

# Phone Features Integrated with BroadWorks User Guide

# Introduction

This document describes how to configure and use the following features integrated with BroadWorks on the Yealink IP phones.

- Busy Lamp Field (BLF) List
- Shared Call Appearance(SCA)
- Feature Key Synchronization
- Automatic Call Distribution (ACD)
- Network Conference
- BroadSoft Phonebook
- BroadSoft Call Log

The features introduced in this document apply to Yealink IP phones (except SIP-T3xG and VP530 IP phones) running software V70 or higher.

Note

The configurations described in this document take the Yealink SIP-T28P IP phone as an example.

# **Changes from Previous Versions**

# **Changes from V1.1**

Major updates have occurred to the following sections:

- Busy Lamp Field (BLF) List on page 5
- Feature Synchronization on page 16
- BroadSoft Phonebook on page 24

# **Changes from V1.2**

Major updates have occurred to the following sections:

- Busy Lamp Field (BLF) List on page 5
- Shared Call Appearance (SCA) on page 9

# **LED Instruction**

#### Line key LED (private line)

LED Status	Description
Solid green	The line is in conversation.
Fast flashing green	The line receives an incoming call.
Slow flashing green	The call is placed on hold.
Off	The line is inactive.

#### Line key LED (shared line)

LED Status	Description
Solid green	The shared line is seized.
	The shared line is in conversation.
	Some party receives ringback.
Slow flashing green	The shared line conversation is placed on public
	hold.
	The shared line conversation is placed on private
	hold.
Fast flashing green	The shared line receives an incoming call.
	For a multi-party call, all the parties place the shared
	line conversation on hold.
Off	The shared line is idle.

#### Line key LED (configured as BLF List key)

LED Status	Description
Solid green	The monitored user is idle.
Fast flashing green	The monitored user receives an incoming call.
Slow flashing green	The monitored user is busy.
Off	The monitored user does not exist.

#### Memory key LED (configured as BLF List key)

LED Status	Description
Solid green	The monitored user is idle.
Flashing red	The monitored user receives an incoming call.
Solid red	The monitored user is busy.
Off	The monitored user does not exist.

### Memory key / Line key LED (configured as ACD key)

LED State	Description
Solid green	The ACD state is available.
Flashing green	The ACD state is unavailable.
Off	Log out the ACD system.

# **Busy Lamp Field (BLF) List**

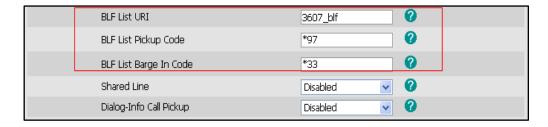
You can use the BLF List feature to monitor a list of users defined by your system administrator on BroadWorks. For example, your system administrator creates a BLF List URI (e.g., blf\_list@as.iop1.broadworks.net) on the BroadWorks server. The monitored users include a list of user1, user2, user3 and user4 on the BroadWorks server. The BLF List keys on the IP phone can present the status of user1, user2, user3 and user4. The key LEDs illuminate either flashing or solid depending on the status of the monitored users. For more BLF List key LED indications, refer to LED Instruction on page 3.

# Configuring the BLF List Feature on the IP phone

You need to configure the IP phone that performs the BLF monitoring. The IP phones being monitored do not require any configuration.

#### To configure the BLF List settings via web user interface:

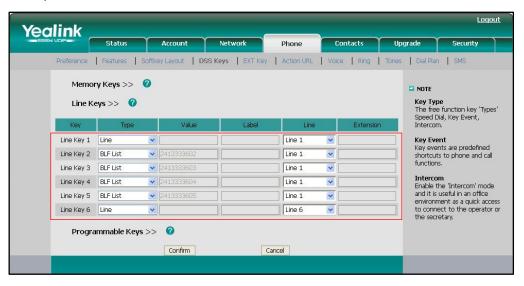
- 1. Click on Account.
- 2. Select the account from the pull-down list of **Account**, which has been configured the BLF List feature on the BroadWorks server.
- 3. Click on Advanced>>.
- 4. Enter the BLF List URI in the BLF List URI field.
- 5. (Optional.) Enter the pickup code in the BLF List Pickup Code field.
- 6. (Optional.) Enter the barge-in code in the **BLF List Barge In Code** field.



7. Click **Confirm** to accept the change.

According to the response message from the BroadWorks server, the IP phone will automatically configure the BLF List keys beginning from the first unused DSS key.

For example, Yealink3607 user on BroadWorks is configured the BLF List feature. The BLF List URI is "3607\_blf". The available monitored users include Yealink 3602, Yealink 3603, Yealink 3604, Yealink 3605. The IP phone registers the BroadWorks user Yealink 3607 on Line 1 and configures the BLF List URI for Line 1. When the phone receives the BLF List response from the BroadWorks server successfully, it will automatically assign the BLF List keys as follows:



# Using the BLF List Feature on the IP phone

You can use the BLF List key in the following ways:

- To place a call to the monitored user.
- To pick up an incoming call received by the monitored user.
- To barge in an active call of the monitored user.

When the monitored user is idle, you can use the BLF List key in the following ways:

#### To place a call to the monitored user when the IP phone is idle:

Press the BLF List key.

The IP phone dials out the phone number of the monitored user.

#### To handle the active call when there is an active call on the IP phone:

When there is an active call on the IP phone, you can handle the active call by pressing the BLF List key differently depending on the transfer mode on DSS key. Depending on your selection:

- If you select Blind Transfer, press the BLF List key to complete a Blind Transfer to the monitored phone number.
- If you select Attended Transfer, press the BLF List key to dial out the monitored phone number and then you can perform an Attended or a Semi-Attended Transfer.
- If you select **New Call**, press the BLF List key to place a new call to the monitored

#### To configure the transfer mode on DSS key via web user interface:

- Click on Phone->Features ->Transfer Settings>>.
- Select the desired transfer mode from the pull-down list of Transfer Mode via DSSkey.
- **3.** Click **Confirm** to accept the change.

When the monitored user receives an incoming call, you can use the BLF List key in the following ways:

#### To pick up the incoming call when the IP phone is idle:

1. Press the BLF List key.

The incoming call of the monitored user is answered on the IP phone.

#### To pick up the incoming call when there is an active call on the IP phone:

1. Press the BLF List key.

The incoming call of the monitored user is answered on the IP phone. The original call is placed on hold.

When the monitored user is during an active call, you can use the BLF List key in the following ways:

#### To interrupt the active call when the IP phone is idle:

1. Press the BLF List key.

The IP phone dials out the barge-in code followed by the extension of the monitored user, and then you can interrupt the call. Each of the three parties can hear the other two parties in the conference.

- Press the Hold or the Cancel soft key.
  - If any party in the conference call presses the Hold soft key, two-way voice can be heard between the remaining parties.

- If any party in the conference call presses the **cancel** soft key, the remaining parties are still connected.

#### To interrupt the active call when there is an active call on the IP phone:

1. Press the BLF List key.

The IP phone dials out the barge-in code followed by the extension of the monitored user, and then you interrupt the call. Each of the three parties can hear the other two parties in the conference. The original call is placed on hold.

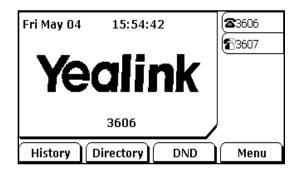
- 2. Press the Hold or the Cancel soft key.
  - If any party in the conference call presses the **Hold** soft key, two-way voice can be heard between the remaining parties.
  - If any party in the conference call presses the **cancel** soft key, the remaining parties are still connected.

#### Note

In order to use the pickup and barge-in features on the IP phone, make sure you have correctly configured the BLF List Pickup Code and BLF List Barge In Code parameters.

# **Shared Call Appearance (SCA)**

You can use the Shared Call Appearance (SCA) feature to share an extension which can be registered on two or more IP phones at the same time. The shared line is indicated by a different line icon. In the following figure, the first line is private and the second line is shared.

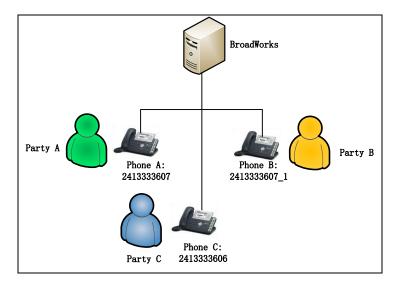


If two phones share a line, an incoming call to this extension will cause both phones to ring simultaneously. The incoming call can be answered on either phone but not both.

This feature is very useful in the boss and secretary scenario. For example, the secretary can share the boss's extension on her phone. When there is an incoming call to the extension of the boss, both the phones of the boss and the secretary will ring simultaneously. Either the boss or the secretary can answer the call. Calls on the shared line can be placed on hold or barged in.

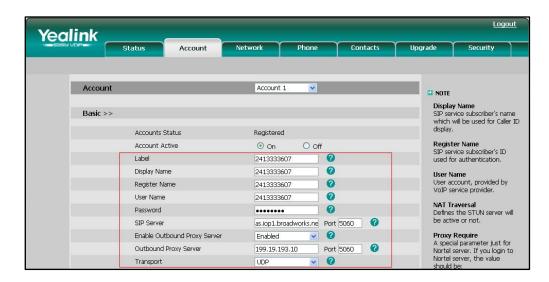
# **Configuring the SCA Feature on the IP Phone**

You can configure a primary account on the IP phone and many alternate accounts on the other IP phones. In the example, party A, party B share the account 2413333607, phone A's line registers the primary account 2413333607, phone B's line registers the alternate account 2413333606.

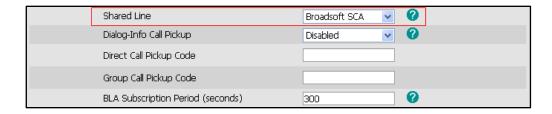


#### To configure the Shared Line settings on phone A via web user interface:

1. Register the primary account 2413333607.



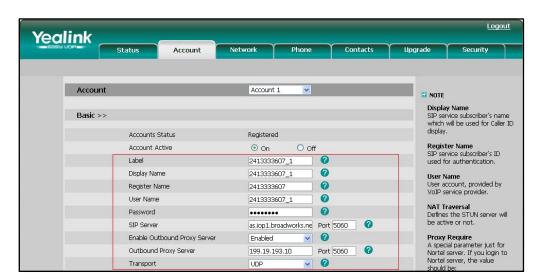
2. Click on Advanced>>, Select Broadsoft SCA from the pull-down list of Shared Line.



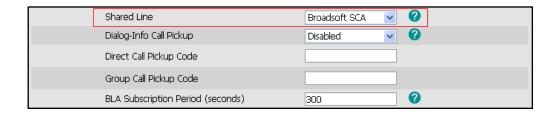
Click Confirm to accept the change.

#### To configure the Shared Line settings on phone B via web user interface:

Register the alternate account 2413333607\_1.
 (Enter the primary account 2413333607 in the Register Name field.)



2. Click on Advanced>>, Select Broadsoft SCA from the pull-down list of Shared Line.



3. Click **Confirm** to accept the change.

### Using the SCA Feature on the IP Phone

#### To place a call on the shared line:

- 1. Press the line key.
- 2. Enter the desired number using the keypad.
- 3. Press (OK), #BODO, or the **Send** soft key.

#### To place multiple calls on the shared line:

You can have more than one call on the shared line. To place a new call when there is an active call on the shared line, do as follows:

- 1. Press the line key.
- 2. The original call is placed on hold.
- 3. Enter the desired number using the keypad.
- 4. Press (ok), #seno), or the **Send** soft key.

#### To answer another call on the shared line:

An incoming call arrives on the shared line when phone A has an active call on the shared line, both phone A and phone B will receive the incoming call. You can answer the incoming call on either phone A or phone B but not both. The LCD screen of phone A displays the information of the incoming call (e.g. "Incoming Call: 3602 yealink").



Do one of the following on phone A:

- Press the **Answer** soft key.

The incoming call is answered and the original call is placed on hold.

- Press ( • ) to access the new call.

Press (ok) or the **Answer** soft key.

The incoming call is answered and the original call is placed on hold.

#### Note

Make sure the call waiting feature is enabled on phone A.

#### To place a call on public hold:

1. Press or the **Hold** soft key on phone A when party A and party C are talking.



The line key LED illuminates flashing green when the shared line call is placed on public hold.

#### To retrieve a call placed on public hold:

You can retrieve the public held call on either phone A or phone B.

#### To retrieve the call on phone A:

1. Press the line key or the **Resume** soft key.

The conversation between phone A and phone C is retrieved.

#### To retrieve the call on phone B:

1. Press the line key.

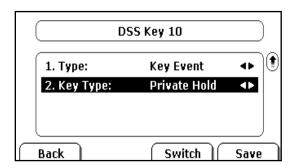
The conversation is established between phone B and phone C, phone A disconnects the call.

To place the call on private hold, you should configure a private hold key in advance.

#### To configure a private hold key on phone A:

- 1. Press Menu->Features->DSS Keys->Memory Keys (or Line Keys).
- 2. Select the desired DSS key.
- **3.** Press (•) or (•), or the **Switch** soft key to select **Key Event** from the Type field.

**4.** Press or , or the **Switch** soft key to select **Private Hold** from the **Key Type** field.



5. Press the **Save** soft key to accept the change.

#### To place a call on private hold:

1. Press the private hold key on phone A when phone A has an active call on the shared line.



The line key LED illuminates flashing green when the shared line call is placed on private hold.

#### To retrieve a call placed on private hold:

The private held call can be only retrieved by the hold party (party A).

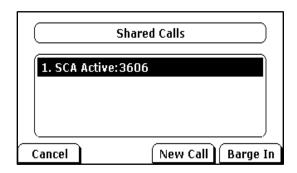
1. Press , the line key or the **Resume** soft key on phone A.

#### To interrupt the active call on the shared line:

If phone A has only one active call, do the following:

1. Long press the line key on phone B.

The Barge In, New Call and Cancel soft keys appear on the LCD screen of phone B.



2. Press the Barge In soft key to interrupt the active call of phone A.

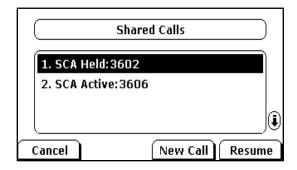
Party B may hear a warning tone and then set up a conference call with the other parties in the active call.

- 3. Press the Hold or the Cancel soft key.
  - If any party in the conference call presses the **Hold** soft key, two-way voice can be heard between the remaining parties.
  - If party A or party B presses the **Cancel** soft key, the remaining parties are still connected. If the other party (not the shared line party) presses the **Cancel** soft key, the conference call is ended.

If phone A has more than one call, do the following:

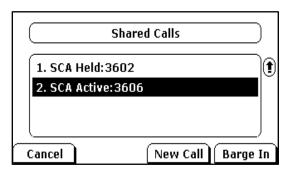
1. Long press the line key on phone B.

The list of calls appears on the LCD screen of phone B.



2. Press ( ) or ( ) to select the active call.

The **Barge In**, **New Call** and **Cancel** soft keys appear when the active call is highlighted.



- 3. Press the **Barge In** soft key to interrupt the active call of phone A.
  - Party B may hear a warning tone and then set up a conference call with the other parties of the active call.
- 4. Press the **Hold** or the **Cancel** soft key.
  - If any party in the conference call presses the **Hold** soft key, two-way voice can be heard between the remaining parties.
  - If party A or the party B presses the Cancel soft key, the remaining parties are still connected. If the other party (not the shared line party) presses the Cancel soft key, the conference call is ended.

For more Line key LED indications, refer to LED Instruction on page 3.

# **Feature Synchronization**

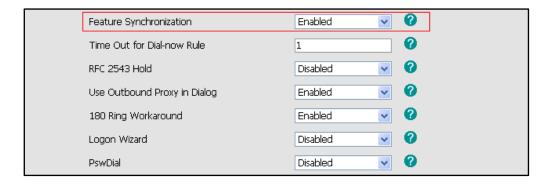
Feature Synchronization provides the capability to synchronize the following BroadWorks feature status with the IP phone.

- Do Not Disturb
- Call Forwarding Always (CFA)
- Call Forwarding Busy (CFB)
- Call Forwarding No Answer (CFNA)
- ACD state

### **Configuring the Feature Synchronization on the IP Phone**

To configure the Feature Sync via web user interface:

- 1. Click on Phone->Features ->General Information>>.
- 2. Select **Enabled** from the pull-down list of **Feature Synchronization**.



3. Click Confirm to accept the change.

### Using the Feature Synchronization on the IP Phone

You can enable/disable the DND/CFWD feature for the phone, or you can customize the DND/CFWD feature for each account or all accounts. The following describes the DND/CFWD key modes:

- Phone (default): Allows you to configure the DND/CFWD feature on a global basis that applies to all accounts.
- Custom: Allows you to configure the DND/CFWD feature for each account or all accounts.

#### To use Feature key Sync in phone mode:

When you change the DND/CFWD status of the IP phone, the phone will notify the BroadWorks server of the status change and BroadWorks changes the DND/CFWD

status for users registered on the IP phone. Conversely, if you change a user's DND/CFWD status via the BroadWorks web portal or feature access code (FAC), the BroadWorks server will notify the IP phone of the status change and the IP phone changes the DND/CFWD status applies to all users.

#### To use Feature Sync in custom mode:

When you change a user's DND/CFWD status of the IP phone, the phone will notify the BroadWorks server of the status change and BroadWorks changes the DND/CFWD status for the user. Conversely, if you change a user's DND/CFWD status via the BroadWorks web portal or feature access code (FAC), the BroadWorks server will notify the phone of the status change and the phone changes the DND/CFWD status for the user.

For the information on how to enable the DND, Call Forwarding Always (CFA), Call Forwarding Busy (CFB) and Call Forwarding No Answer (CFNA) features, refer to the Yealink IP phones User Guide at: http://www.yealink.com/index.php/Support/.

For the information on how to use the Feature Synchronized ACD, refer to Automatic Call Distribution (ACD) on page 18.

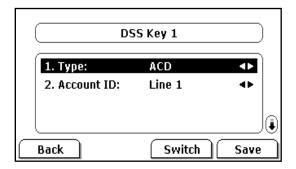
# **Automatic Call Distribution (ACD)**

Automatic Call Distribution (ACD) feature is often used in offices for customer service, such as call center. The ACD system handles incoming calls by automatically queuing and directing calls to available agents. The ACD feature on the IP phone allows the ACD system to distribute calls from large volumes of incoming calls to the registered users. To use the ACD feature, you should configure an ACD key in advance.

### Configuring the ACD Key on the IP phone

To configure an ACD key via phone user interface:

- 1. Press Menu->Features->DSS Keys->Memory Keys (or Line Keys).
- 2. Select the desired DSS key.
- 3. Press ( ) or ( ) , or the **Switch** soft key to select **ACD** from the **Type** field.
- 4. Press or , or the **Switch** soft key to select the desired line from the **Account ID** field.



5. Press the **Save** soft key to accept the change or the **Back** soft key to cancel.

You can enable the Feature Synchronization to synchronize with the ACD state on the BroadWorks server. For the information on how to enable this feature, refer to Feature Synchronization on page 16.

Note

Feature synchronized ACD is not supported on shared line. If shared line is configured in that way, unexpected behavior could result.

# Using the ACD Feature on the IP Phone

If you enable the ACD feature on the IP phone, you will be able to:

- Log in and log out as an agent
- Change the ACD state using the soft keys

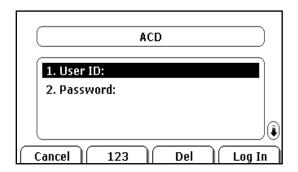
#### To log in using the ACD key:

1. Press the ACD key when the IP phone is idle.

The LCD screen of the IP phone prompts you the following information:

User ID: the user identity used to log in the ACD system.

Password: the password used to log in the ACD system.



2. Press the Log In soft key to log in the ACD system.

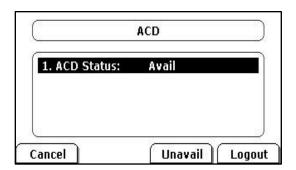
The ACD key LED illuminates flashing green indicates that the ACD state is unavailable. By default the initial state is unavailable.

#### To log out using the soft key:

Press the Logout soft key when the IP phone logs in.
 The ACD key LED turns off when the IP phone logs out.

#### To change the ACD state using the soft keys:

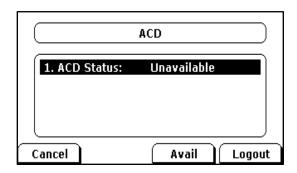
Press the Avail soft key when the phone logs in.
 The ACD key LED illuminates solid green indicates that the ACD state is available.



When you set the phone to available, the ACD key LED illuminates solid green, and then the server begins distributing calls to the IP phone.

#### 2. Press the Unavail soft key.

The ACD key LED illuminates flashing green indicates that the ACD state is unavailable.



When you set the phone to unavailable, the ACD key LED illuminates flashing green, and then the server temporarily stops distributing calls to the IP phone.

If you enable the Feature Key Synchronisation on the IP phone, the ACD state on the IP phone is synchronized with the ACD state on the BroadWorks server. When you set the ACD state to available on the BroadWorks server, the ACD state on the IP phone will change to available and the ACD key illuminates solid green. Conversely, when you set the ACD state to available on the IP phone, the ACD state on the BroadWorks server will change to available.

For more Line key LED indications, refer to LED Instruction on page 3.

### **Network Conference**

You can use network conference feature to conduct a conference with multiple participants. The maximum of the participants depend on the BroadWorks server.

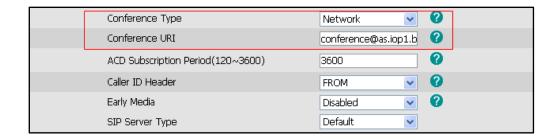
This feature allows you to perform the following:

- Join two calls together into a conference call.
- Invite another party into an active conference call.

# Configuring the network conference on the IP Phone

To configure the network conference via web user interface:

- 1. Click on Account.
- 2. Select the desired account from the pull-down list of Account.
- Click on Advanced>>, Select Network from the pull-down list of Conference Type, and enter the conference URI in the Conference URI field.



4. Click Confirm to accept the change.

**Note** 

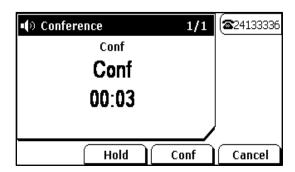
Please contact your system administrator for the conference URI.

# Using the network conference on the IP Phone

To set up a network conference call:

- 1. Place a call to the first party.
- Press or the Conf soft key to create a new call.
  The active call is placed on hold.
- **3.** Enter the number of the second party and press  $(o_K)$ ,  $\#_{soo}$ , or the **Send** soft key.

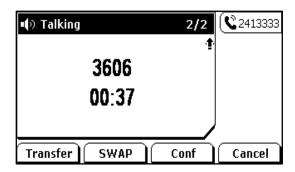
**4.** When the second party answers the call, press or the **Conf** soft key to add the second party to the conference.



5. Press the Conf soft key to create a new call.

The conference is placed on hold.

- **6.** Enter the number of the new party and then press (0K),  $(\#_{MN})$ , or the **Send** soft key.
- 7. When the new party answers the call, press or the **Conf** soft key to add the new party to the conference.



8. Repeat steps 5 to 7 to add more parties.

#### To join two calls together into a conference call:

- 1. Place a call to the first party.
- 2. Press the line key to create a new call.
- 3. The active call is placed on hold.
- 4. Enter the number of the second party and press (ok), (#sso), or the **Send** soft key.
- 5. When the second party answers the call, press or the **Conf** soft key to join two calls into a conference call.

#### To invite another party into an active conference call:

Before the following steps, at least one active conference call must exist on your IP phone.

- 1. Press the line key to create a new call.
- 2. The conference call is placed on hold.
- 3. Enter the number of the new party and then press (N), (H), or the **Send** soft key.
- 4. When the new party answers the call, press  $\bigcirc$  or the **Conf** soft key to add the

new party to the conference.

#### To place the active conference call on hold:

All the parties in the conference call press the Hold soft key.
 If partial parties in the conference call press the Hold soft key, two-way voice can be heard between the remaining parties.

#### To end the conference call on the IP phone:

The conference initiator presses the Cancel soft key.
 If any other party in the conference call presses the Cancel soft key, the remaining parties are still connected.

### **BroadSoft Phonebook**

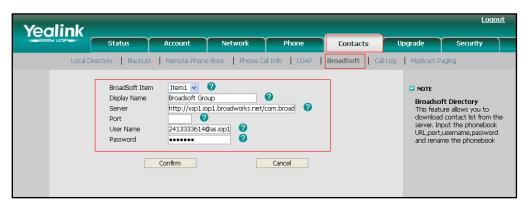
You can access the BroadSoft directory through the IP phone. You can add local contacts from the BroadSoft directory. You can also dial a contact from the BroadSoft directory.

You can configure the IP phone to access up to 6 directory items.

### Configuring the BroadSoft Phonebook on the IP Phone

To configure the BroadSoft phonebook via web user interface:

- 1. Click on Contacts->BroadSoft.
- 2. Select the desired BroadSoft item from the pull-down list of Broadsoft Item.
- **3.** Enter the parameters: display name, server address, port, username and password in the corresponding fields.
- 4. Click Confirm to accept the change.



Note

Please contact your system administrator for the server URI, user name and password.

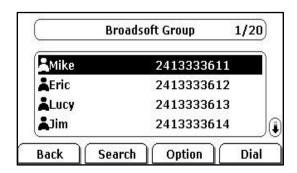
# Using the BroadSoft Phonebook on the IP Phone

To access the BroadSoft phonebook via phone user interface:

1. Press Directory->Broadsoft.

2. Select the desired directory item, and then press the Enter soft key.

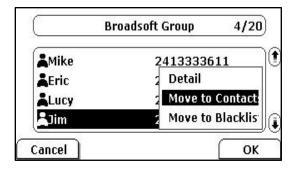
The phone connects to load the BroadSoft phonebook, and then displays the desired contact list on the LCD screen.



3. Press the **Back** soft key to back to the previous interface.

#### To add a contact to the local directory from the BroadSoft directory:

- 1. Press Directory->Broadsoft.
- Select the desired directory item, and then press the Enter soft key to load the BroadSoft directory.
- 3. Select the desired contact in the BroadSoft directory.
- 4. Press the Option soft key and then select Move to Contacts from the prompt list.



- 5. Make the desired changes.
- 6. Press the **Save** soft key to accept the change.
- 7. The entry is successfully saved to the local directory.

#### To place a call from the BroadSoft directory:

- 1. Press Directory->Broadsoft.
- Select the desired directory item, and then press the Enter soft key to load the BroadSoft directory.
- 3. Select the desired contact in the BroadSoft directory.
- 4. Press the **Dial** soft key.

# **BroadSoft Call Log**

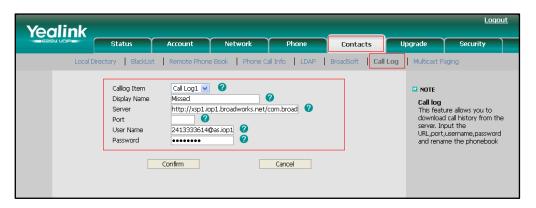
You can access the call log of the BroadSoft user through the IP phone. The call log contains call information such as remote party identification, time and date. You can check the call log and dial a call from the call log list. The BroadSoft call log allows users to view and dial the stored numbers in the following lists: missed, received, and placed.

You can configure the IP phone to access up to 3 call log items.

### Configuring the BroadSoft Call Log on the IP Phone

To configure the BroadSoft call log via web user interface:

- 1. Click on Contacts->Call Log.
- 2. Select the desired call log item from the pull-down list of Callog Item.
- **3.** Enter the parameters: display name, server address, port, username and password in the corresponding fields.
- 4. Click Confirm to accept the change.



Note

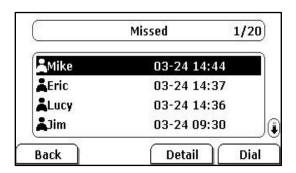
Please contact your system administrator for the server URI, user name and password.

### Using the BroadSoft Call Log on the IP Phone

To access the BroadSoft call log via phone user interface:

1. Press Menu->History Type->Network CallLog.

- 2. Select the desired call log menu, and then press the **Enter** soft key.
- **3.** The phone connects to load the BroadSoft call log, and then displays the desired call log list on the LCD screen.

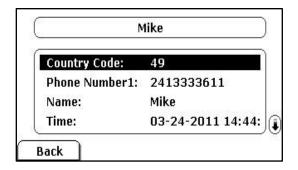


4. Press the **Back** soft key to back to the previous interface.

#### To check the BroadSoft call log:

- 1. Press Menu->History Type->Network CallLog.
- 2. Select the desired call log menu, and then press the **Enter** soft key to load the BroadSoft call log.
- 3. Press the **Detail** soft key.

The detailed information of the entry appears on the LCD screen.



#### To dial a call from the BroadSoft call log list:

- 1. Press Menu->History Type->Network CallLog.
- Select the desired call log menu, and then press the Enter soft key to load the BroadSoft call log.
- 3. Select the desired contact in the BroadSoft call log list.
- 4. Press the **Dial** soft key.