

# Hosted Phone System Guide

YEALINK  
Admin Version



# Index

## CommPortal Management

- MaX UC App ..... 3
- Announcements..... 3
- Call History ..... 4
- Forward Calls ..... 4
- Hunt Groups | Change Rotation ..... 4
- Hunt Groups | Log In or Out..... 5
- Intercom | Automatic Answer ..... 5
- Kari’s Law (9-1-1) ..... 6
- Keys..... 7
- Missed Call Notification ..... 7
- Music On Hold ..... 7
- Priority Callers..... 8
- Schedule Adjustments | Auto Attendant Answer ..... 8
- Schedule Adjustments | Live Answer ..... 9
- Speed Dials & Short Codes ..... 10
- Voicemail | Greeting..... 10
- Voicemail | Email Notification ..... 11
- Voicemail | Message to Email ..... 11

## Using Your Phone

- Phone Keys & Hardware..... 12
- Make a Call..... 12
- Conference Call..... 12
- Forward Call..... 12
- Transfer a Call ..... 13
- Call History ..... 13
- Missed Call Notification ..... 13
- Voicemail ..... 14
- Voicemail | Greeting..... 14
- Voicemail to Email..... 14
- Headset Configuration..... 15
- Connect a Wireless Speaker..... 15
- MaX UC Mobile App..... 15

# Index Continued

## Troubleshooting

Headset Noise.....	16
Reboot Phone.....	16

## FAQs

Call Ring Back.....	17
Dialing 911.....	17

# COMMPORTAL MANAGEMENT

Access the CommPortal at <https://commportal.wabash.com>. Then log in using your given credentials.

## MaX UC App (Premium Attendant Only)

To download the MaX UC app to your computer, in the CommPortal:

1. Near the bottom of the page under support, select *Downloads*
2. Select *On your Computer*
3. Select *OK*
4. Follow the on-screen instructions, using your credentials

## Announcements

You must be logged in as the Administrator using <https://commportal.wabash.com/bg>

There are two ways to add or change announcements/recordings.

- Using a Headset or Microphone

1. In the CommPortal, select *Attendants* on the left side
2. Select either *Easy* or *Premium Attendants*
3. Select *Open in New Window*
4. Select *Announcements*
  - i. Add new Announcement
  - ii. Name your recording
  - iii. Record your announcement
  - iv. Save
  - v. Add

- Using a Handset

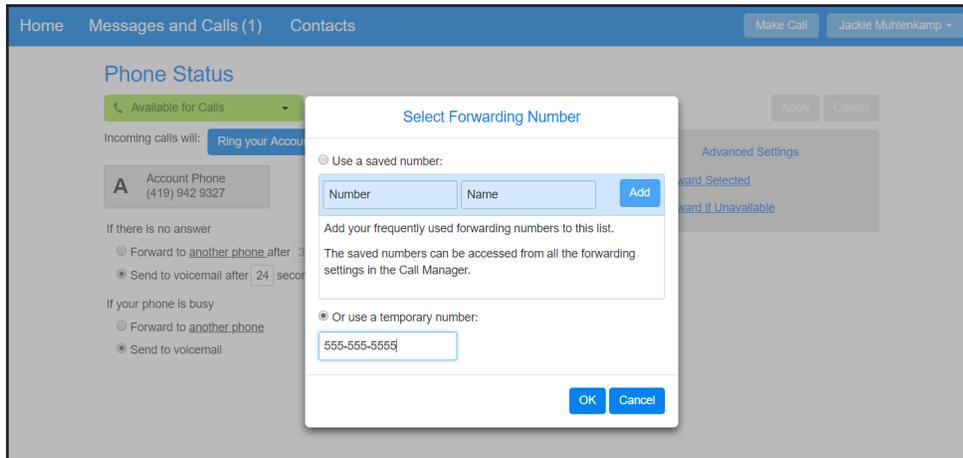
1. Dial your Auto Attendant number
2. Dial \*6 (ignore the active/inactive message)
3. Enter the pin number
4. Follow the prompts to record
5. Go to the CommPortal to set

## Call History

To view your call history in the CommPortal:

1. Select *Messages and Calls* from the top of the page
2. Toggle between the options to view the history

\*To view your call history from your desk phone, please see the Call History topic in the Using Your Phone section.



## Forward Calls

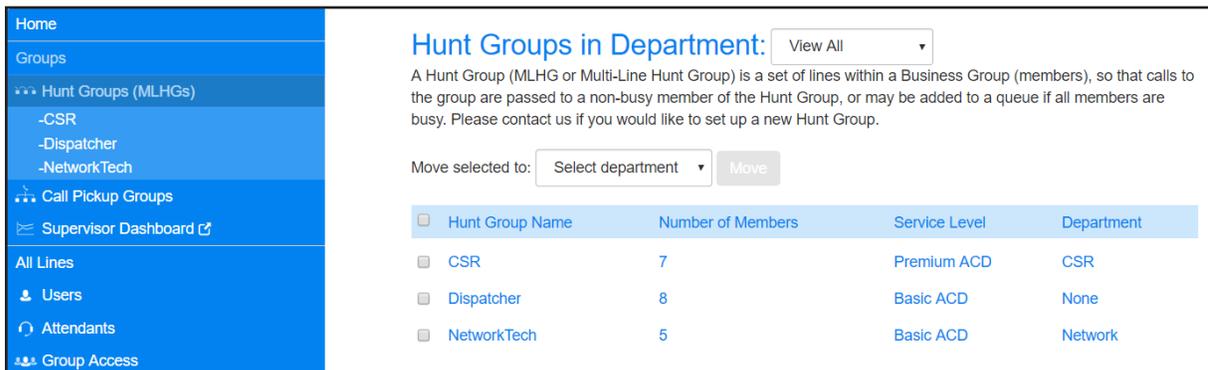
To forward calls to another phone instead of voicemail, follow these steps in the CommPortal:

1. On the main screen, under *If there is no answer*, select the button next to *Forward to another phone*
2. Select another phone
3. Add the number you would like the call to forward to, then select *OK*

## Hunt Groups | Change Rotation (Admin Only)

To change the rotation of the calls in the hunt group, follow these steps in the CommPortal:

1. After logging into the CommPortal, select *Hunt Groups* on the left
2. Select the hunt group you would like to adjust



Hunt Group Name	Number of Members	Service Level	Department
CSR	7	Premium ACD	CSR
Dispatcher	8	Basic ACD	None
NetworkTech	5	Basic ACD	Network

3. Select *Settings*
4. Select *Hunt Settings* to change the following:

**Hunt Group CSR in Department: CSR**

Hunt Group Pilots    Hunt Group Members    **Settings**

Preferences    **Hunt Settings**

Apply    Cancel

This page shows the settings for the Multi Line Hunt Group. Hunting is applied to all calls to pilot numbers. Hunting is optionally applied to direct-dialed calls to busy Hunt Group members.

Settings	Value
Call Distribution Algorithm	Uniform (Longest idle) ▾
Maximum queue length	16
Is line hunting applied to direct-dialed calls?	<input type="checkbox"/>
Is the Pilot's information delivered as the Caller ID?	<input type="checkbox"/>
Ring each member for (secs)	12
If a member does not answer, do not call again for (secs)	36

- Call Distribution Algorithm
  - Linear
  - Circular
  - Uniform (Round robin): Randomly chooses who will receive the call
  - Uniform (Longest idle): Will ring the person who has been off of the phone the longest
  - Ring all: All calls will ring in the hunt group
- Ring Each Member for (Sec)
  - Adjust the amount of time for the call to ring each person before moving to the next

## Hunt Groups | Log In or Out

If a user is part of a hunt group, they are able to change their status to log in or out of the group.

1. After logging into the CommPortal, select *Groups*
2. Within the group, change your status to *Login* or *Logout*

\*Users can see other users status on this screen.

\*Admin users can access all CommPortal user accounts to change their status.

## Intercom | Automatic Answer

The automatic answer setting determines whether the phone may answer certain types of calls, (usually this is used for intercom calls). To change this setting, follow these steps:

1. After logging into the CommPortal, select *Devices* at the bottom left
2. Select *Set Keys*
3. Below the image of the desk phone, select *Edit*
4. Select *User* and then *Call Services*
5. Change the Automatic Answer radio button to *No* to turn off auto answering, or *Yes* to turn on

▼ User

► Preferences

► Locale

▼ Call Services

\*Automatic answer  Yes  No

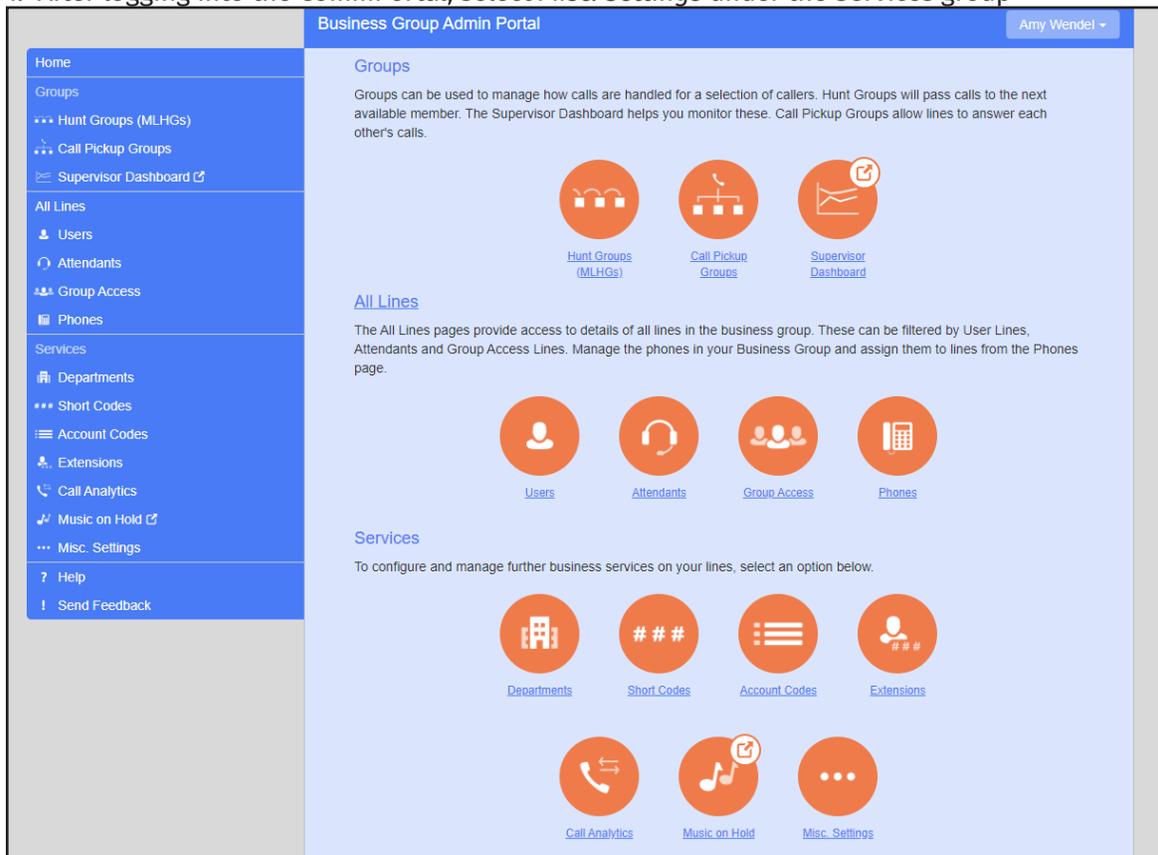
6. Select *Save Changes*

## Kari's Law (9-1-1) (Admin Only)

Kari's Law is legislation in the United States that requires multi-line telephone systems to route 9-1-1 emergency service calls through the phone systems automatically. Kari's Law mandates that the electronics and software used in multi-line systems support direct-dial-to-emergency-services, even if the system normally requires the caller to enter an additional digit for an outside line. Under this law, Wabash is subject to alert the front desk line that someone in the building/facility has called 9-1-1. This will also pinpoint the extension that made the phone call.

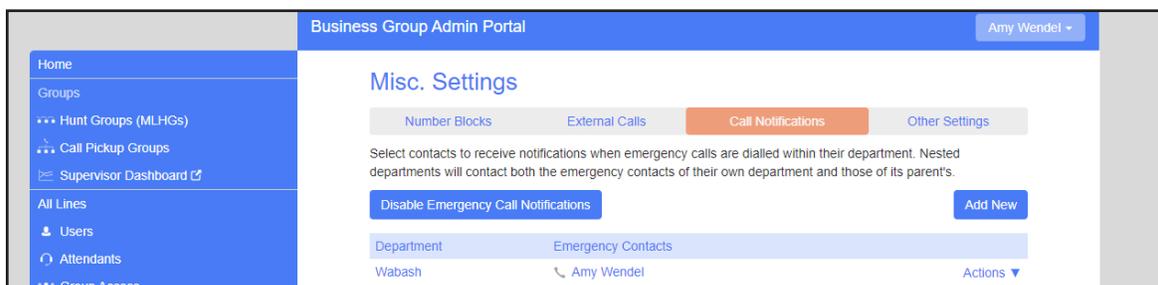
To update the details, follow these instructions:

1. After logging into the CommPortal, select *Misc. Settings* under the Services group



The screenshot shows the Business Group Admin Portal interface. On the left is a navigation menu with categories: Home, Groups (Hunt Groups (MLHGs), Call Pickup Groups, Supervisor Dashboard), All Lines (Users, Attendants, Group Access, Phones), Services (Departments, Short Codes, Account Codes, Extensions, Call Analytics, Music on Hold, Misc. Settings), Help, and Send Feedback. The main content area is titled 'Business Group Admin Portal' and 'Amy Wendel'. It features a 'Groups' section with icons for Hunt Groups (MLHGs), Call Pickup Groups, and Supervisor Dashboard. Below that is an 'All Lines' section with icons for Users, Attendants, Group Access, and Phones. The 'Services' section is active, showing icons for Departments, Short Codes, Account Codes, Extensions, Call Analytics, Music on Hold, and Misc. Settings. The 'Misc. Settings' page is displayed, with tabs for Number Blocks, External Calls, Call Notifications, and Other Settings. The 'Call Notifications' tab is selected, showing a 'Disable Emergency Call Notifications' button and an 'Add New' button. Below is a table with columns for Department and Emergency Contacts. The table shows 'Wabash' as the department and 'Amy Wendel' as the emergency contact.

2. Select Call Notifications



This screenshot is identical to the previous one, but it highlights the 'Call Notifications' tab in the 'Misc. Settings' section. The 'Add New' button is also highlighted.

3. Select *Add New*, then add the person(s) that should receive the notifications.  
- Notifications can be by email or by phone

## Keys

Each key on your desk phone can be customized to give you quick access to options you use most, including speed dialing. Keys can be changed in your CommPortal.

1. At the bottom of the CommPortal page, select *Devices* from the Personal Details column.
2. A window will pop-up with the devices you are able to edit. Select *set keys*.
3. Select the *Edit* button under the phone you would like to edit.
4. Select Programmable Line Keys and see the following images to program the keys:

- Inner Company Extension

▼Key 7 Shop Phone	
Soft key action	Enhanced Monitor Extension <input type="button" value="Reset"/>
Line	Line 1
Extension	409
Label	Shop Phone

- External Number (ie Cell Phone)

- Be sure to add "91" before the 10-digit number, just as you would normally dial.

▼Key 8 Charlie Cell	
Soft key action	Speed Dial <input type="button" value="Reset"/>
Line	Line 1
*Number	4199429340
*Label	Charlie Cell

6. Save. Your phone will reboot.

## Missed Call Notification

To disable the "Missed Calls" notification message on your desk phone:

1. At the bottom of the CommPortal page, select *Devices* from the Personal Details column.
2. A window will pop-up with the devices you are able to edit. Select *set keys*.
3. Select the *Edit* button under the phone you would like to edit.
4. Select *Features*
5. Select *Notification Popups*
6. Find the "Display missed call popups" topic and select *No*.

To disable the "Missed Call" flash indicator your desk phone:

1. At the bottom of the CommPortal page, select *Devices* from the Personal Details column.
2. A window will pop-up with the devices you are able to edit. Select *set keys*.
3. Select the *Edit* button under the phone you would like to edit.
4. Select *Preferences*
5. Select *Power LED*
6. Find the "Power LED flash for missed calls enable or disable" topic and press *Apply*.

## Music On Hold (Admin Only)

To add or edit music on hold, use the following steps:

1. In the CommPortal, select *Music on hold* on the left side
2. Select *Edit/Add* on the right side

## Priority Callers

To set allow specific callers to ring through when on Do Not Disturb (DND), follow these steps.

1. In the CommPortal, change the Phone Status to Do Not Disturb.
  2. Select Priority Callers to set numbers that can ring through. Add contacts and select OK.
  3. Select Apply to save your changes.
- To answer a call when on DND, select the answer button or your number button (top left on phone).
  - If you are using the Max UC app, you will answer as normal.

**Phone Status**

Do Not Disturb [Apply] [Cancel]

Incoming calls will be forwarded to voicemail

Allow priority callers to ring when in Do Not Disturb

Incoming calls will: Ring your Account Phone

Account Phone (419) 942 9327

If there is no answer

Forward to another phone after 36 seconds

Send to voicemail after 24 seconds

If your phone is busy

Forward to another phone

Send to voicemail

Advanced Settings

Forward Selected

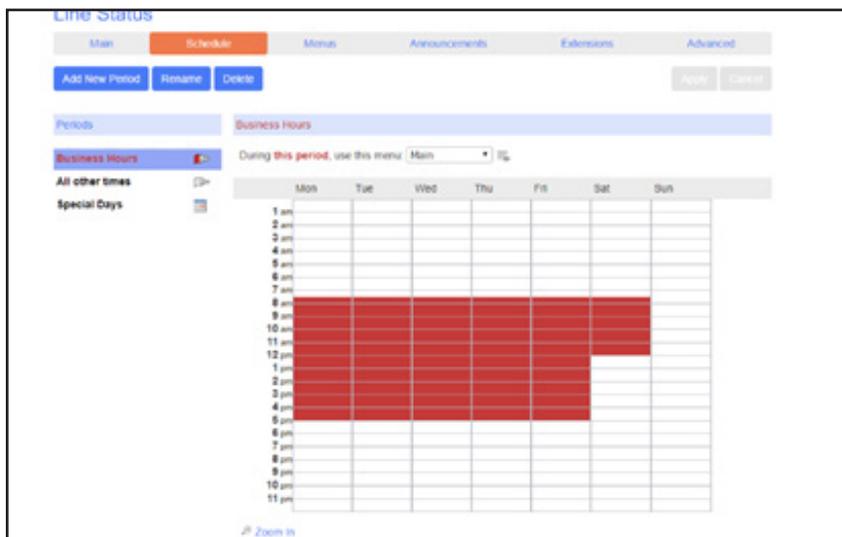
Forward if Unavailable

## Schedule Adjustments | Auto Attendant Answer (Premium Attendant Only, Admin Only)

To set or edit the time your phone rings or when the call is answered by the auto attendant (ie. for office hours, holidays, etc.), follow these steps:

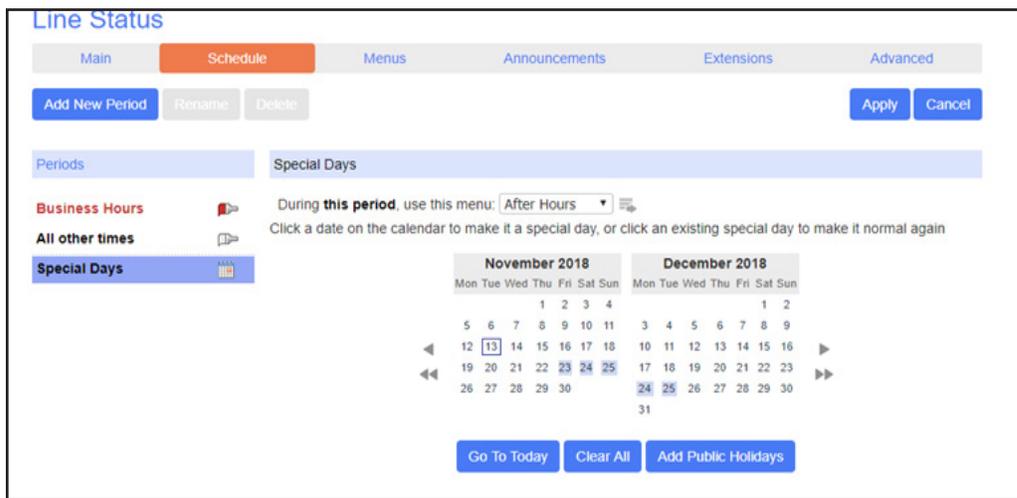
1. In the CommPortal, select Attendant on the left
  2. Select Premium Attendant
  3. A new window will open
  4. Select Schedule
  5. Adjust the office hours
- To add the holidays, select Special Days

Below is the screen you will see. The red indicates time when the phone will ring through. The white indicates the call is answered by the auto attendant.



Below is the screen you will see for Special Days. Notice November 23, 24 & 25 and December 24 & 25 are grayed. This indicates the phones will go to auto attendant automatically.

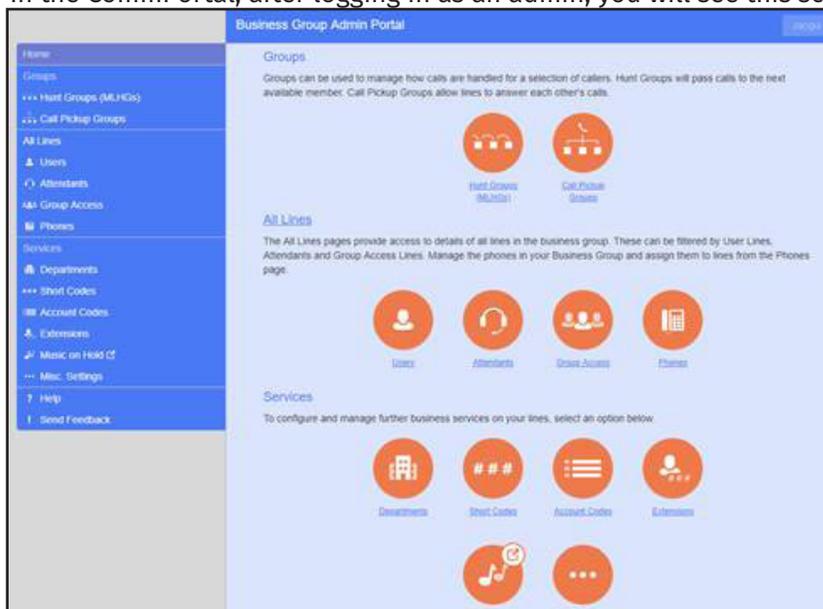
\*Note that the calendar week begins on a Monday.



## Schedule Adjustments | Live Answer (Admin Only)

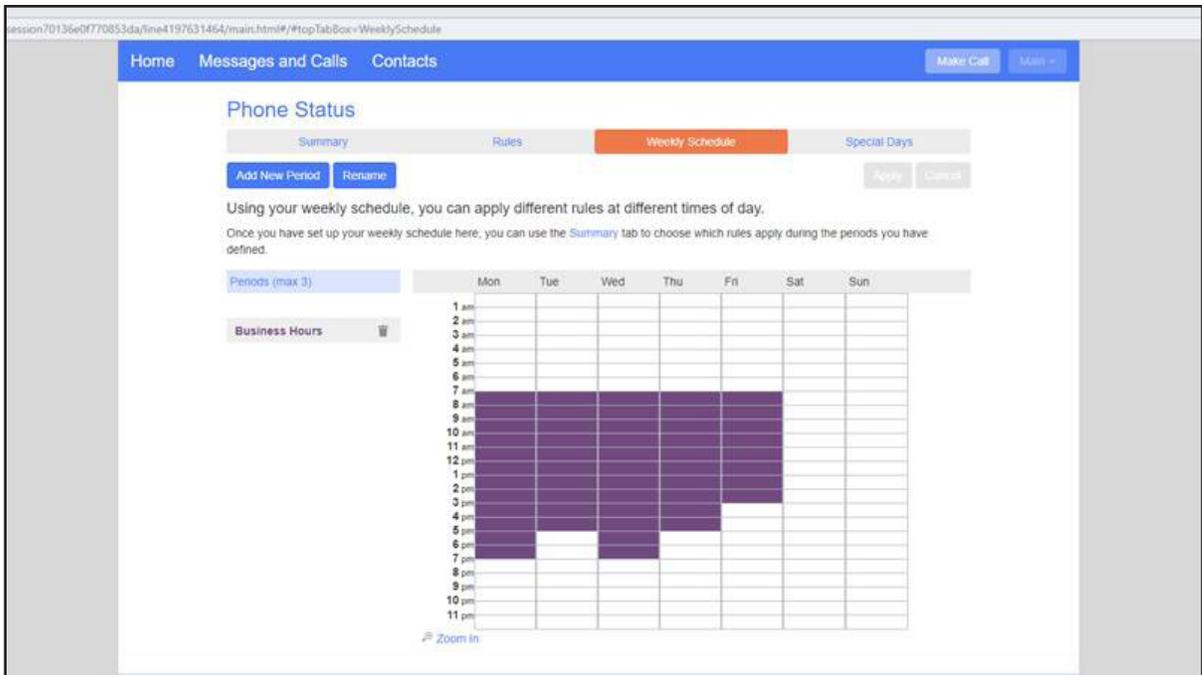
To set or edit the time your phone rings or when the call is answered by the auto attendant (ie. for changed office hours, holidays, etc.), follow these steps:

1. In the CommPortal, after logging in as an admin, you will see this screen:



2. Select Hunt Groups on the left side
3. Select Main Line
4. Select your number near the middle of the page
5. Select Open in a new window
6. Select Weekly Schedule

Below is the screen you will see. The purple indicates when the phone will ring in the office during the selected hours. To add or remove, just select the time area. You can adjust the schedule by 15 minutes if you select the zoom in button.



## Speed Dials & Short Codes (Admin Only)

Speed dials and short codes can be added/edited from the CommPortal.

\* If you have a lot of these to add, Wabash can import them for you.

1. In the CommPortal, select Short Codes
2. Select Add
  - Short Code is the number you want their speed dial to be
  - Telephone number is the phone number the short code will dial

\* The number 9 cannot be used as a speed dial as this is the number used to place an external call.

## Voicemail | Greeting

To set up your voicemail greeting, follow these steps:

1. In the CommPortal, select *Message Settings*
2. Select *Voicemail Greeting*
3. Select the type of greeting from the drop down, then select *edit*
4. Here you can record (red circle) or listen to (play button) your greeting
  - To record, you must give CommPortal permission to your microphone, if asked
5. Select *save*

Voicemail greetings can also be setup and changed using your deskphone. See the *Voicemail | Greeting* topic in the Using Your Phone section.

## **Voicemail | Email Notification**

To receive an email notification of a voicemail message, follow these steps:

1. In the CommPortal, select *Notifications*
2. Select *Email*
3. Select the box next to *Send email notification of incoming messages to the following address*
4. Select *New Entry*, and enter the email address you would like to receive voicemail, select *Add*
5. Select the box under *All Voicemail*
6. Select *Apply*

Multiple email addresses can be added by repeating steps 3-6.

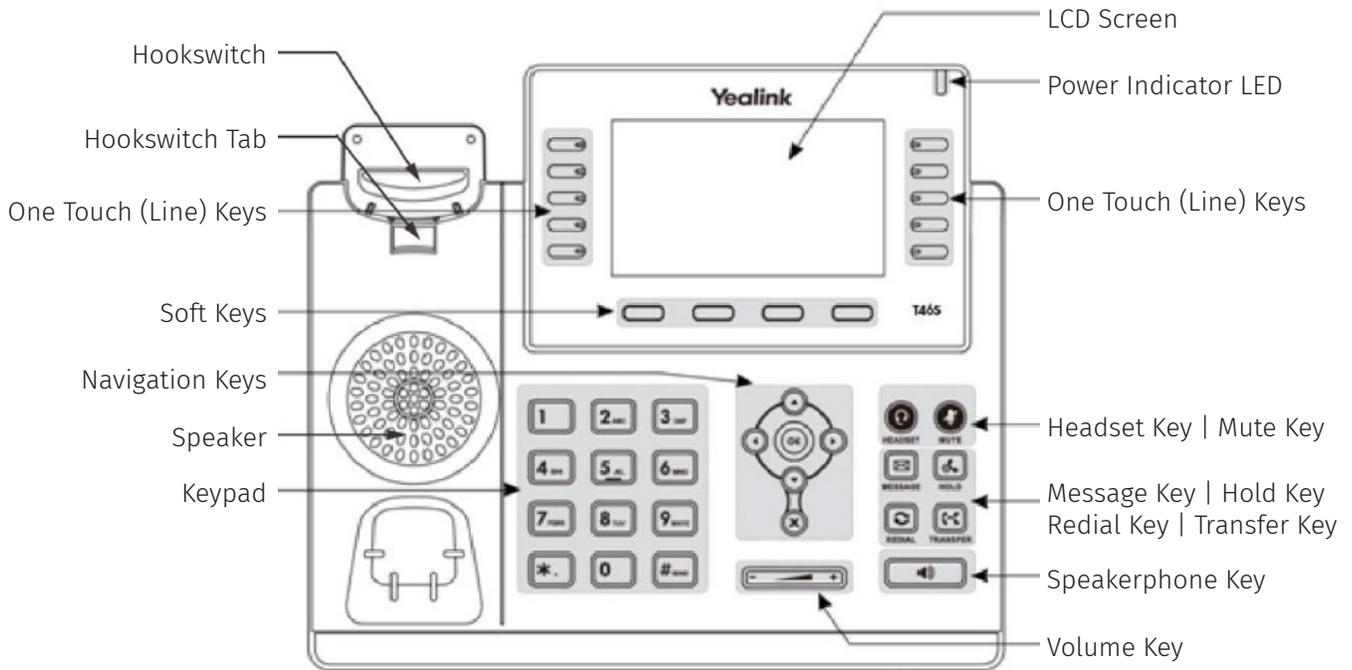
## **Voicemail | Message to Email**

Voicemail messages can be send to an email address as a .wav file. To set up this function:

1. In the CommPortal, select *Message Settings*
2. Under *General*, select the box next to *Forward messages as emails*
3. Select *add an email address*
4. Enter the email address you would like to receive the voicemail, select *Add*
5. Select *Apply* to save the change

# USING YOUR PHONE

## Phone Keys & Hardware



## Make a Call

To make a call from your desk phone, follow these steps:

- Call an External Number
  - Dial the phone number
- Call an Extension
  - Dial the extension number
  - You may need to select *Dial* to begin the phone call if you do not hear a dial tone.
- Call a Speed Dial (*one touch key*)
  - Select the key on your phone/sidecar

## Conference Call

To make a conference call, or add a person to your current call, follow these steps:

1. With one person on the line, select *Conference*
2. Enter the extension or phone number, then select *Send*
3. When connected to the second party, select *Conference*. You will then have both parties.

## Forward Calls

To forward calls to another phone instead of voicemail, on your desk phone:

- To enable, dial \*72 and the number to forward calls to
- To disable, dial \*73

## Transfer a Call

There are three options of how to transfer a phone call.

- CONSULTIVE: Speak with the requested party before transferring
  1. Select *Transfer*
  2. Enter the Extension or phone number (do not use one-touch buttons)
  3. Select *Call*
  4. After speaking with the dialed party, select *Transfer*
- BLIND: Transfer the call directly to the requested party, Caller ID will show
  1. Select *Transfer*
  2. Enter the Extension or phone number
  3. Press *B Transfer*
- VOICEMAIL: Transfer the call directly to the requested party's voicemail
  1. Select *Transfer*
  2. Enter 7 + the Extension or phone number
  3. Select *Send*

## Call History

To check your call history on your desk phone, select the History key:

- Navigate between All calls, Missed calls, Placed calls, Received calls, and Forwarded calls

\* To view your call history in the CommPortal, please see the Call History topic in the CommPortal section.

## Missed Call Notification

If you miss a phone call, a “# Missed Calls” notification message will appear on the top right corner of the screen on your desk phone.

- View Missed Calls
  1. Select the down arrow of the circle navigation key
  - \* This will also remove the “# Missed Calls” notification message

\* The “# Missed Calls” notification message can be disabled in the CommPortal. See the Missed Call Notification topic in the CommPortal section.

## Voicemail

When you receive a voicemail, a red light will flash on the top right of your desk phone. There are two ways to check your voicemail:

\* Voicemail must initially be set up on your phone and you will need to change your pin number.

- Phone Key

1. Select the envelope “mail” key on your desk phone (left of the number keys)
2. Enter your pin number

- Dial In

1. Dial \*15
2. Enter your pin number

To check your voicemail when you are away from your desk, on any phone:

1. Dial 419-942-MAIL (6245) and follow the prompts:
2. Dial the number you want to check the voicemail for
3. Enter your pin number

## Voicemail | Greeting

To set up your voicemail greeting, follow these steps:

1. On your desk phone, dial \*15
2. Dial your pin number
3. Dial 3
4. Follow the prompts to record your voicemail greeting

Voicemail greetings can also be setup and changed in the CommPortal. See the *Voicemail | Greeting* topic in the CommPortal section.

## Voicemail to Email

Voicemail messages can be sent to an email address as a .wav file. To set this up, see the *Voicemail | Message to Email* topic in the CommPortal section.

A notification of a voicemail may also be sent to your email. To set this up, see the *Voicemail | Email Notification* in the CommPortal section.

## Headset Configuration

To configure a headset to a desk phone, simply plug the headset in.

## Connect a Wireless Speaker

To connect a wireless speaker, follow these steps:

1. Plug in the USB Bluetooth adaptor to the back of the phone (top goes up)
2. Click Menu
3. Go down to Basic
4. Go down to Bluetooth
5. Click Enter
6. Arrow over (so Bluetooth is "on")
7. Save
8. Turn on Speaker
9. Click Scan on Phone
10. Hold the Bluetooth Button down on Speaker (until it announces Bluetooth Pairing)
11. Click Connect
12. Exit to main screen
13. Click the Headset button when on call and wanting to use the Speaker

## MaX UC Mobile App (Premium Users Only)

MaX UC is a mobile app that allows you to take the functions of your desk phone with you. To get started, follow these steps:

1. Download the MaX UC app from your device's app store. This is a free app.
2. Enter your phone number (DID number)
3. Enter your password
4. Log in

# TROUBLESHOOTING

## Headset Noise

If you experience extra noise or echoing on your headset, you may have interference with another headset.

To fix do the following:

- Check to be sure the bottom dial is set to 2 or 3
- Make sure the slide switch is on "A"

## Restart Phone

If your phone needs to be rebooted, follow these steps:

1. Select the *Menu* button
2. Using the Navigation (arrow) keys, select *Settings*
3. Select *Basic*
4. Navigate down to *#9 (Reboot)*
5. Select *Enter*
6. When asked "Are you sure?" select *OK*

## **FAQs**

### **Call Ring Back**

Do calls ring back after being on hold for a time?

- They can. We can set calls to ring back at your company's choice of length.

### **Dialing 911**

How do I dial 911 in case of emergency?

- To dial 911, simply dial 9-1-1.