

# USER GUIDE

# YipTel Desktop

Name:

Phone/User #:

Password:

VM Pin:

**Training Video Available** | Go to [www.yiptel.com](http://www.yiptel.com) and click on Resources, Training Center, then select YipTel Cloud. On this page, you will find YipTel Desktop training videos. For additional questions, call (800)752-6110 or email [myservice@yiptel.com](mailto:myservice@yiptel.com).

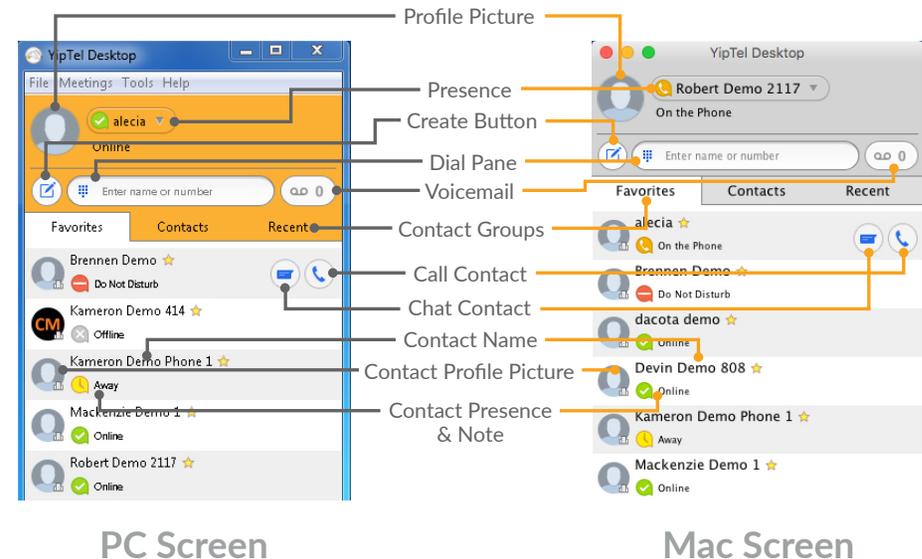
**To Access The Online User Portal** | Open a web browser and go to [portal.yiptel.com](http://portal.yiptel.com). Enter your phone number (without dashes) and password as listed above, then click **Login**.

**To Download The YipTel Desktop Application** | Once you are logged into the portal, select the **Apps** tab. Click the section to install **'On your Computer.'** Select your computer type. Click the link to download and install the software. Once you have the desktop application installed, it will ask you to log in with the same phone number and password provided above.

**Set Up Audio Settings** | Set up your audio settings by clicking the **Tools Menu** then **Options**, then click on the **Audio** icon. Mac Users: click **YipTel Desktop**, then **Preferences**. Ensure the audio devices you plan to use are correctly listed.

**To Set Up Your Voice Mail** | Dial **\*86** from your Dial Pane on your YipTel Desktop app. It will ask for a PIN. Your PIN is listed at the top of this page.

## YipTel Desktop Layout



PC Screen

Mac Screen

**Answer** | To Answer an incoming call, click on the **Accept** button.

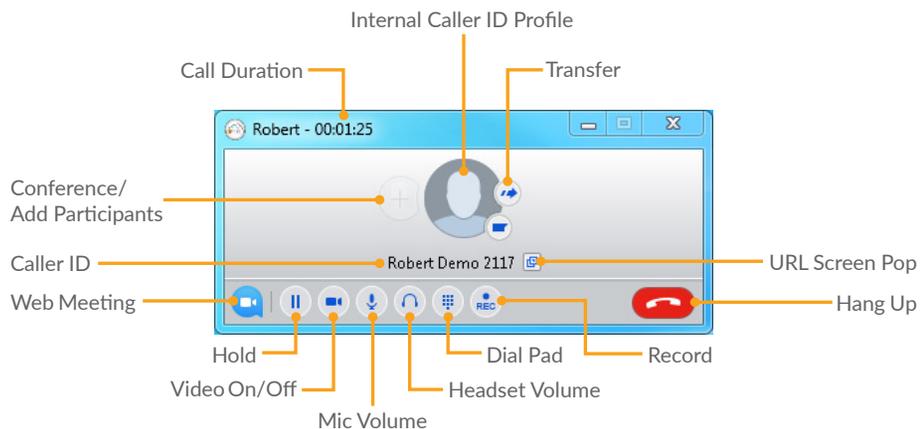


**To Make An External Call** | From the Dial Pane, type in the phone number to call and press **Enter**.



**To Make An Internal Call** | From the Dial Pane, type in the person's name, mouse over the name from the list, click on the phone icon and select the phone number you would like to dial.

## Call Window Layout



**Answer While On A Call** | Press the **Accept** button in the second pop up display. The current call you are on will be placed on hold automatically, and you will be connected to the incoming call.

**Personal Hold** | While on a call, click the **Hold** button. To resume the call, click the **Hold** button again.

**Park** | (System-wide Hold)

While on a call, select **Call Park** from the **Tools Menu**, then choose the slot to park your call, by clicking on **Park Call Here**.



**UnPark** |

From the **Tools Menu**, choose the **Call Park** option. This will open the Call Park window. Choose the call park orbit desired by clicking on the button marked **Pick Up Call**.



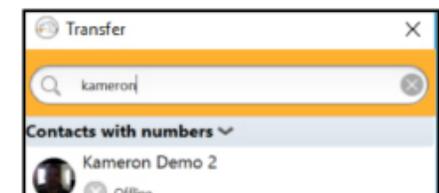
\*\*Call Park and UnPark must be enabled by going to Tools/Options/Calls and clicking on the Enable Call Park check box. Mac Users:

click YipTel Desktop, then Preferences, and click Enable Call Park check box.\*\*

**Blind Transfer** |

(You do not wish to announce the transfer to the party) While on the phone with the caller, press the **Transfer** button. Input a phone number, extension, or name into the transfer window.

You may choose to finish typing the number, or click on the options presented below and then click on **Transfer Call** on the bottom of the transfer window.



**Supervised Transfer** |

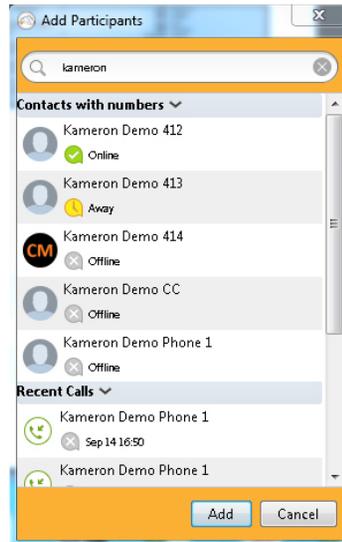
(You wish to announce the transfer to the party) While on the phone with the caller, enter another number in the Dial Pane and press **Enter/Return**. This will put the first caller on hold and call the 2<sup>nd</sup> party. When they answer, click the **Transfer** button on the original call window and choose the other party from the drop down menu .



Transfer Button

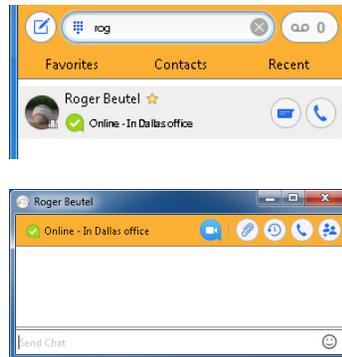
If the caller chooses not to take the call, you may hang up on the 2<sup>nd</sup> caller and resume the first call by pressing the **Hold** button.

**Conference A Call** | (Add participants) Call the first party, then press **Add Participants**. Input a phone number, an extension number, or type a name into the Add Participants window. It will auto search all contacts and you may click on the number or name below. Once the Contact is selected, click the **Add** button on the bottom of the Add Participants window. This will create a 3 party conference.



**Call Pickup** | To pick up any ringing phone in your department, dial **\*11** in your dial pane then click **Dial**. To pick up a call ringing at a specific extension, dial **\*12** followed by the extension number of the ringing phone and press **Enter**.

**Chat** | Begin by typing the name of the person you wish to chat with in the dial pane. When they appear in the contacts list below, click on the **Chat** icon just to the right of their name.



Type your message in the bottom section of the chat window and press **Enter** to send.

**Group Chat** | To create a new group chat, click **File** and select **New Group Chat**.

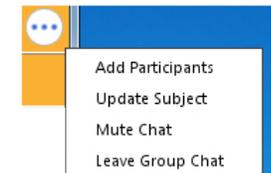
You can update the name of the group by changing the text in the subject line.



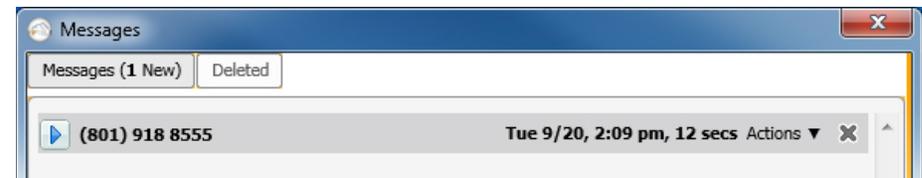
Then start typing the names of the contacts you wish to group chat with. Check the check box on the right to add them to the group chat. Continue this process to search and select the additional parties. Then select the **Create Group Chat** button below.



During a group chat, you can click on the menu button for additional options.



**Check Voice Mail** | To check your voice mail messages, click the



**Voicemail Indicator** button. Then click **Play** to hear your messages. You can click on the **Actions** button for additional options or on the **X** to delete your messages.

