

## SIP-T40P IP Phone

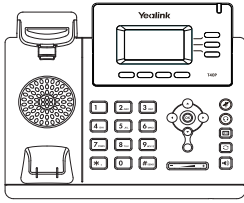
Microsoft<sup>®</sup> Skype for Business<sup>™</sup> Edition



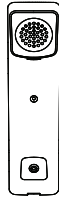
## Quick Start Guide (V8.21)

## Packaging Contents

The following items are included in your package. If you find anything missing, contact your system administrator.



IP Phone



Handset



Handset Cord



Ethernet Cable



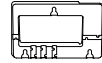
Stand



Quick Start Guide



Power Adapter  
(Optional)

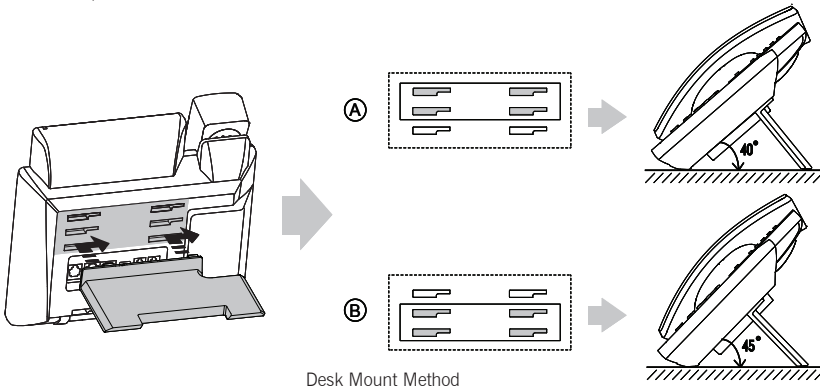


Wall Mount Bracket  
(Optional)

Note: We recommend that you use the accessories provided or approved by Yealink. The use of unapproved third-party accessories may result in reduced performance.

## Assembling the Phone

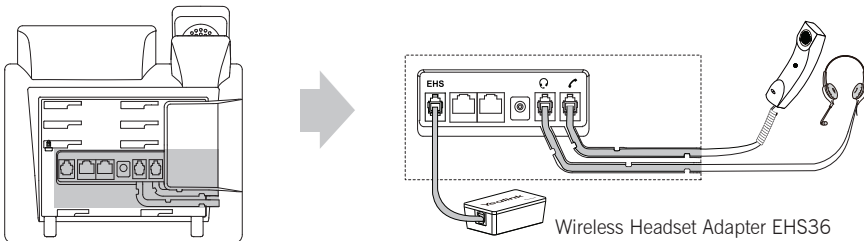
1. Attach the stand, as shown below:



Desk Mount Method

Note: You can also mount the phone to a wall. For more information on how to attach the wall mount bracket, refer to Yealink Wall Mount Quick Installation Guide for Yealink IP Phones.

2. Connect the handset and optional headset, as shown below:

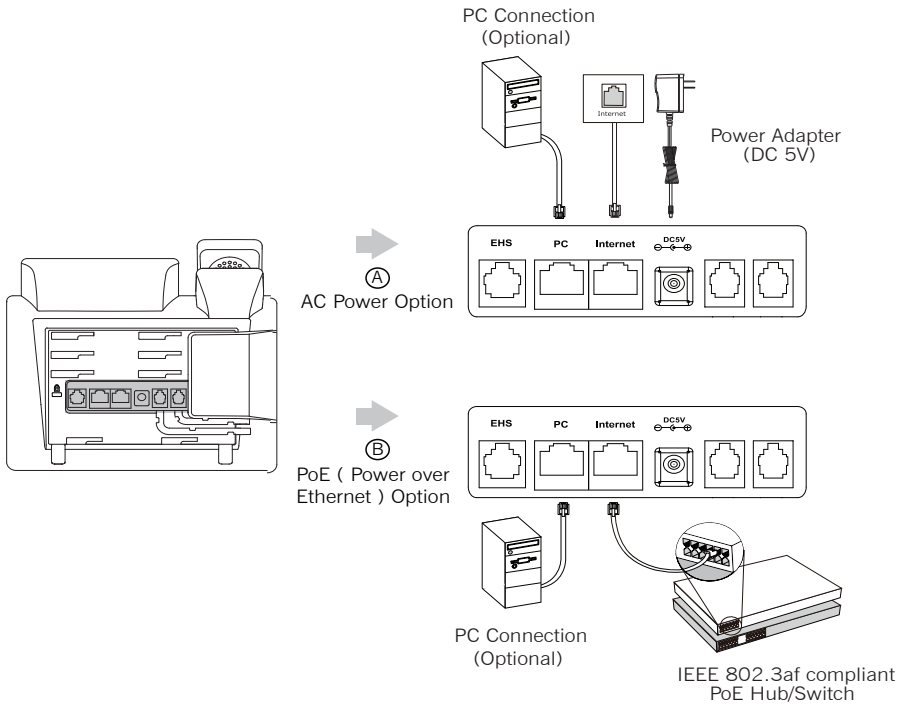


Wireless Headset Adapter EHS36

Note: The headset or wireless headset adapter EHS36 should be purchased separately. EHS36 is used for connecting the phone and a compatible wireless headset. For more information on how to use the EHS36, refer to Yealink EHS36 User Guide.

### 3. Connect the network and power, as shown below:

You have two options for network and power connections. Your system administrator will advise you which one to use.



Note: The IP phone should be used with Yealink original power adapter (5V/600mA) only. The use of the third-party power adapter may cause the damage to the phone.  
If inline power (PoE) is provided, you don't need to connect the power adapter. Make sure the hub/switch is PoE-compliant.



## Startup

After the IP phone is connected to the network and supplied with power, it automatically begins the initialization process. After startup, the sign-in screen appears on the phone LCD screen. Refer to **Sign-in** on page 3 to sign into Skype for Business Server.

Welcome  
Initializing... please wait

## Sign-in



The sign-in screen displays after initializing. You can sign into Skype for Business Server using **PIN Authentication**, **User Sign in** or **Device Pairing for Online** method.

1. Press the **Sign in** soft key to enter the sign-in screen.
2. Press  or  to select the desired sign-in method.
  - a. If you select **PIN Authentication** (Only applicable to Onprem account):
    - 1) Enter the extension and extension PIN in the corresponding field. If **Remember pwd** is enabled, the extension PIN will be filled automatically when you enter the extension next time.
    - 2) Press the **Sign in** soft key.
  - b. If you select **User Sign in** (Applicable to Onprem account and Online account):
    - 1) Enter the user's sign-in address, name and password in the corresponding field. If **Remember pwd** is enabled, the user name and password will be filled automatically when you enter the sign-in address next time.
    - 2) Press the **Sign in** soft key.
  - c. If you select **Device Pairing for Online** (Only applicable to Online account):
    - 1) Select the desired country, and then press the **Sign in** soft key, the LCD screen will show the pairing code and URL.
    - 2) Enter the URL in the address bar of the web browser on your PC, and then press **Enter**.
    - 3) Enter your email address to check its validity. If your email address passes validation, enter your Online account and password, and then enter the pairing code to pair with the phone. The phone will sign into the Skype for Business Server automatically.

If the Skype for Business Server is configured to forcibly lock the phone. You need to configure an unlock PIN at the initial sign-in.



Note: Make sure the network connection is correct before login. By default, the phone attempts to contact a DHCP server in your network to obtain its valid network settings. Contact your system administrator for more information.

### To sign out of the Skype for Business Server:

1. Press the **Status** soft key when the phone is idle.
2. Press  or  to select **Sign out**.

### Change Presence Status

Your presence status is constantly updated by the Skype for Business Server. The presence status on the phone is synchronized with the Skype for Business Server. You can manually change your presence status on the phone.

1. Press the **Status** soft key when the phone is idle.
2. Press  or  to select the desired presence status.

You can select **Reset Status** to reset the presence status to "Available".

### Presence Status Icons on the LCD Screen:



Available



Busy



DND



Unknown



Be Right Back/Off Work/Away



Off Line

Note: Contact your system administrator if any error appears during the sign-in process or if a specific configuration is required.


## Basic Call Features

### Placing a Call

#### Using the handset:

1. Pick up the handset.
2. Enter the number, and then press the **Send** soft key.

#### Using the speakerphone:



1. With the handset on-hook, press .
2. Enter the number, and then press the **Send** soft key.

#### Using the headset:

1. With the headset connected, press  to activate the headset mode.
2. Enter the number, and then press the **Send** soft key.


Note: During a call, you can alternate between the headset, hands-free speakerphone and handset modes by pressing the **HEADSET** key, the **Speakerphone** key or by picking up the handset. Headset mode requires a connected headset.

### Answering a Call






- If you are using the handset, pick up the handset or press the **Answer** soft key.
- If you are using the speakerphone, press  or press the **Answer** soft key.
- If you are using the headset, press  or press the **Answer** soft key.

Note: You can reject an incoming call by pressing **More->Reject**.



### Ending a Call

- If you are using the handset, hang up the handset or press the **HangUp** soft key.
- If you are using the speakerphone, press  or the **HangUp** soft key.
- If you are using the headset, press the **HangUp** soft key.

### Redial

- Press  to enter the **Placed Calls** list, press  or  to select the desired entry, and then press  or the **Call** soft key.
- Press  twice when the phone is idle to dial out the last dialed number.

### Call Mute and Un-mute

- Press  to mute the microphone during a call.
- Press  again to un-mute the call.



### Call Hold and Resume

#### To place a call on hold:

1. Press the **Hold** soft key during an active call. The first line key LED slowly flashes green.

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### To resume the call, do one of the following:

- If there is only one call on hold, press the **Resume** soft key.
- If there is more than one call on hold, press  or  to select the desired call, and then press the **Resume** soft key.



### Call Transfer

You can transfer a call in the following ways:

#### Blind Transfer:

1. Press the **Tran** soft key during an active call. The call is placed on hold.
2. Enter the number or press the **Dir** soft key to select the desired contact from the contact list you want to transfer to.
3. Press the **Tran** soft key.

#### Attended Transfer:

1. Press the **Tran** soft key during an active call. The call is placed on hold.
2. Enter the number or press the **Dir** soft key to select the desired contact from the contact list you want to transfer to, and then press  or .
3. Press the **Tran** soft key when the second party answers.

### Call Forward

#### To enable call forward:

1. When the phone is idle, press **Menu->Features->Call Forward**.
2. Do one of the following:
  - a. Select **Forward to Voice Mail**.  
Incoming calls will be forwarded to voice mail automatically.
  - b. Select **Forward Calls to Number**.  
Enter the desired number or press the **Dir** soft key to select the desired contact in the **Forward to** field.  
Incoming calls will be forwarded to the preset number automatically.
  - c. Select **Simultaneously Call**.  
Enter the desired number or press the **Dir** soft key to select the desired contact in the **Simultaneously Ring** field.  
The preset number will ring simultaneously when the phone receives an incoming call.
3. Press the **OK** soft key to accept the change.

#### To disable call forward:

1. When the phone is idle, press **Menu->Features->Call Forward**.
2. Select **Forward off**.
3. Press **OK** soft key to accept the change.

#### To forward an incoming call to a number dynamically:

1. Press the **FWD** soft key when the phone receives an incoming call.
2. Do one of the following:
  - Enter the number you want to forward the incoming call to, and then press the **Send** soft key.
  - Press the **Dir** soft key to select the desired contact from the contact list, and then press the **FWD** soft key.



#### To forward an incoming call to the voice mail dynamically:

1. Press **More->FWD VM** to forward an incoming call to voice mail directly.

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## Skype for Business Conference



### To initiate a Skype for Business conference call from the phone:

1. Press **Menu**->**Meet Now** to initiate a Skype for Business conference call directly.
2. Press the **Add** soft key to invite a new party.
3. Enter the number of the new party, and then press  ,  or the **Send** soft key.  
The new party answers the call to join the conference automatically.
4. Repeat the steps 2-3 to add more parties to the conference.
5. During the Skype for Business conference, you can hold the conference, view the conference participants, mute or unmute the participants, promote or demote conference participants, remove conference participants, enable or disable the announcement, lock or unlock the conference and view the dial-in number and conference ID.

## Voice Mail


When receiving a new voice mail, the phone will play a warning tone. The power LED will be slowly flashing red, and the LCD screen will prompt “n New Voice Mail(s)”.

### When you sign into the phone using User Sign in/Device Pairing for Online method:

1. Press **Menu**->**View Voice Mail**.
2. Press  or  to select the desired voice mail, you can do one of the following:
  - Press the **Msg** soft key to enter the Message Center.
  - Press the **Detail** soft key to view the detailed information about the voice mail.  
Press the **Mark** soft key to mark the unread voice mail as read.  
Press the **Send** soft key to redial the one who leaves the voice mail.
  - Press the **Play** soft key to listen to the selected voice mail.



### When you sign into the phone using PIN Authentication method:

1. Press **Menu**->**View Voice Mail**.
2. Press the **Connect** soft key.
3. Follow the voice prompts to listen to your voice mails.

Note: You can following the voice prompts to listen to the voice mail by pressing  .

## Phone Features

### Call History

1. Press the **History** soft key when the phone is idle, press  or  to select the desired list.
2. Select an entry from the list, you can do one of the following:
  - Press the **Call** soft key to place a call.
  - Press the **Delete** soft key to delete the entry from the list.
  - Press the **Detail** soft key to view detailed information about the entry.

### Directory

The directory list displays Skype for Business directory and local directory. You can only manage Skype for Business directory through the Skype for Business client and manage the local directory on the phone.

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## Skype for Business Directory

### To add a Skype for Business contact:

1. Open your Skype for Business client, and then enter the number of the desired contact in the search field.
2. Right-click the avatar of a contact, and then click **Add to Contacts List**.
3. Click the desired group.  
The contact is added to the selected group.

If you want to add the Skype for Business contacts as favorites, do the following:

1. Right-click the avatar of contact.
2. Click **Add to Favorites**.  
The contact will be added to the phone at the path: **Dir->SFB Directory->Favorites**.

### To search for contacts in the Skype for Business directory:



1. Press **Dir->SFB Directory**.
2. Press the **Search** soft key.
3. Enter the first few continuous characters of the contact name or the contact number (e.g., press the digit key 5 to search the letter "5, j, k and l"). The entries whose name or phone number matches the characters entered will appear on the LCD screen.

## Local Directory



### To add a local contact:

1. Press **Dir->Local Directory->All Contacts**.
2. Press the **Add** soft key.
3. Enter a unique contact name in the **Name** field and other information in the corresponding fields.
4. Press the **Save** soft key to accept the change.

### To edit a local contact:

1. Press **Dir->Local Directory->All Contacts**.
2. Press  or  to highlight the desired contact.
3. Press the **Option** soft key and then select **Detail**.
4. Edit the contact's information.
5. Press the **Save** soft key to accept the change.

### To delete a local contact:



1. Press **Dir->Local Directory->All Contacts**.
2. Press  or  to highlight the desired contact.
3. Press the **Option** soft key and then select **Delete**.
4. Press the **OK** soft key when the LCD screen prompts "Delete selected item?".

Note: You can also delete all contacts by pressing the **Option** soft key, and then select **Delete All**.

## Local Favorites

Local favorites are the contacts in your local directory that you call most often.



### To add a local favorite via phone user interface:

1. Press **Dir->Local Directory->Favorites**.
2. Press the **Add** soft key.
3. Enter a unique contact name in the **Name** field and other information in the corresponding fields.
4. Press ,  or the **Switch** soft key to elect the priority number from the **Priority** field.  
Local favorites display consecutively, according to their priority number. The contact with the lowest number displays first. If you select **None** from the **Priority** field, the contact displays first.
5. Press the **Save** soft key to accept the change.



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## Volume Adjustment

- Press  during a call to adjust the receiver volume of the handset/speakerphone/headset.
- Press  to adjust the ringer volume when the phone is idle or ringing.

## Using the Calendar

To use the calendar feature on your phone, you must sign into the phone using **User Sign in** or **Device Pairing for Online** method. When you set up Skype conferences, appointments, meetings, events, or receive conferences invitation in Outlook® application, your phone will display all schedules in the Calendar menu.

### To view the calendar:

1. Press **Menu**->**Calendar**.
2. Press the **Month** soft key.
3. Press  or  to select the desired month.
4. Press  or  to select the desired day.
5. Press the **Enter** soft key to view schedules of the specific day.
6. Press  or  to select a desired schedule.
7. Press the **Detail** soft key to view details of the specific schedule.

### Schedule reminder


The phone displays a schedule reminder 15 minutes before a schedule starts.

- Press the **Ignore** soft key to permanently remove the reminder and stop reminding.
- Press the **Snooze** soft key to temporarily remove the reminder, until the next schedule reminder. The reminder will appear every 5 minutes before the schedule starts.
- Press the **Detail** soft key to view details of the specific schedule.
- If you receive a Skype conference reminder, press the **Join** soft key to join the Skype conference.

## Boss-Admin

The Boss-Admin feature enables a boss to assign delegates to manage boss's incoming call. A “boss” and a “delegate” phone will ring simultaneously when a user calls the boss.

### To assign delegates in the Skype for Business client:

1. Open Skype for Business client, and then sign into Skype for Business client as the person who wants to assign a delegate.
2. Click  , and then click **Call Forwarding Settings**.
3. Mark the radio box of **Simultaneously ring**.
4. Select **My Delegates** from the pull-down list of **Simultaneously ring**.
5. In the **Delegates** dialog box, click **Add** and select the desired delegates from the **Choose a Delegate** dialog box.

### To view a list of bosses on your phone:

1. Press **Dir**->**SFB Directory**->**Bosses**.

### To view a list of delegates on your phone:

1. Press **Dir**->**SFB Directory**->**Delegates**.

### The boss answers an incoming call for a boss's phone:

1. The boss presses the **Answer** soft key when the boss receives a call. The delegate's phone stops ringing.

### The delegate answers an incoming call for a boss's phone:

1. The delegate presses the **Answer** soft key when the boss receives a call. The boss's phone stops ringing.

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**The boss places a call on hold on a boss's phone:**

1. During a call, the boss presses the **Hold** soft key to place the call on hold. The second line key LED of the delegate's phone flashes green.

**The delegate places a call on hold on a delegate's phone:**

1. During a call, the delegate presses the **Hold** soft key to place the call on hold. The second line key LED of the boss's phone flashes green.

**The boss resumes a call held by a delegate:**

1. Press the flashing line key to view the call that is held by a delegate.
2. Select the desired call.
3. Press the **Resume** soft key.

**The delegate resumes a call held by a boss:**

1. Press the flashing line key to view the call that is held by a boss.
2. Select the desired call.
3. Press the **Resume** soft key.

**The delegate transfers a delegation call to the boss's voice mail, do one of the following:**

- Press the **BossVM** soft key when the phone is ringing.
- Press **More-> BossVM** after the delegate answers the call.

**The delegate makes a safe transfer to a boss's phone:**

1. Press **More-> SafeTr** during a call. The call is placed on hold.

Note: If the boss is not available to answer the transferred call or rejects the transferred call, the delegate's phone displays as "Transfer failed" and the delegate can resume the call.

**The delegate places a call on behalf of an assigned boss:**

1. Press **Dir-> SFB Directory-> Bosses**, and then select the desired boss.
2. Press the **Option** soft key and select **On behalf** from the prompt list.
3. Enter the number or press the **Dir** soft key to select the desired contact.
4. Press the **Send** soft key.  
The call displays as "Calling On behalf of" boss's line on the delegate's phone.

**The delegate adds a boss's line to a Skype for Business conference call:**



1. Press the **Answer** soft key to join an incoming conference call.
2. If you want to invite the boss's line to the conference, press the **Invite** soft key.
3. Press the **OK** soft key to send the invitation.

When the boss joins the conference call, the delegate can choose to continue or leave the conference.

**Common Area Phone**

Common area phone is the IP phone that is not associated with an individual user. It is typically located in some places where a large number of people are likely to gather. Common area phone supports the basic call features, including placing a call, answering a call, placing a call on hold, resuming a held call, muting or unmuting a call and ending a call like a regular phone. To use the common area phone, you must sign into the phone using **PIN Authentication** or **Device Pairing for Online** method.

**To switch a CAP account to a Skype for Business account:**

1. Press the **Sign in** soft key when the phone is idle.
2. Press  or  to select the desired sign-in method.
3. Refer to **Sign-in** on page 3 to sign into your Skype for Business account.

No matter whether you sign out of the Skype for Business account, the phone will sign into the last CAP account automatically after a period of time.

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### To sign out of a common area phone:

1. Press **Menu**->**Settings**->**Advanced Settings** (admin or the unlock PIN)->**CAP Sign Out**.


### Better Together over Ethernet (BToE)

When you have enabled BToE to work with your SIP-T40P IP phone, you can place, answer, hold and resume calls on your phone and in the Skype for Business client. You can also change the audio device between your computer and phone in the Skype for Business client.

### To set BToE feature via phone user interface:


1. Press **Menu**->**Settings**->**Advanced Settings** (default password: admin) -> **BToE**.
2. Press  ,  or the **Switch** soft key to select **Enabled** from the **BToE** field.
3. Enter the pairing code (default PIN: 0000) in the **BToE Pairing Pin** field.
4. Press the **Save** soft key.

### To pair your phone with Skype for Business client:


1. Sign into your Skype for Business client.
2. If connect your PC to the PC port on IP phone using an Ethernet cable, the IP address of your phone will be filled automatically. If your computer is not connected to the PC port on the phone, you need to enter the IP address manually.
3. Enter the corresponding PIN (default PIN: 0000) in the **PIN** field.
4. Click **Pair**.
  - If the phone is not signed in, enter the password in the pop-up dialog box on your PC, and then click **OK**.
  - If the Skype for Business client and phone are signed in by different accounts, right-click on  , and then select **Sign in by Lync(L)**, enter the password in the pop-up dialog box on your PC, and then click **OK**.
  - If the Skype for Business client and phone are signed in by the same account, the phone is connected to the Skype for Business server automatically.

### Using Better Together over Ethernet (BToE)


#### To place a call, do one of the following:

- Hover your cursor over the avatar of the contact, and then click  in the Skype for Business client.
- Select a contact or enter the phone number, and then press the **Send** soft key on your phone.

#### To answer a call, do one of the following:

- Click  in the Skype for Business client.
- Press the **Answer** soft key on your phone.

#### To hold a call, do one of the following:

- Click  , and then click  in the Skype for Business client.
- Press the **Hold** soft key on your phone.

#### To resume a call, do one of the following:

- Click  , and then click  in the Skype for Business client.
- Press the **Resume** soft key on your phone.

#### To change the audio device during a call in the Skype for Business client:

1. Click  , and then click  to change the audio device.

## **About us**

Founded in 2001, Yealink, a leading provider of VoIP Phone and IP communication solutions, has been focusing on VoIP products characterized by reliable quality, easy deployment and affordable price for more than a decade. Today, customers from over 140 countries rely on Yealink as the backbone of global collaboration to extend the value of network communications.

## **More about Yealink**

Since 2001, Yealink has continued to develop state-of-the art, hi-tech VoIP communication terminals that include IP video phones, IP phones and USB phones. With a worldwide market in more than 140 countries, the company has also established a first-class international service network.

Our priorities are quality, functionality, ease-of-use, customer support and competitive pricing. To provide new solutions for the future in this fast-evolving sector, Yealink's large, talented and highly-experienced VoIP R&D team is totally committed to the pursuit of excellence.

To date, we have passed more than 80 interoperability tests and meet certification requirements set by leading VoIP system and platforms. Yealink works in close partnership with T-Mobile, Telefonica, Portugal Telecom and other leading telecommunication service providers.



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