Setting Up Your Cordless Desk Phone and Base Station for your OfficeSuite® Phone
Welcome to OfficeSuite® Phone

Your new 100 percent cloud-based system, OfficeSuite® Phone includes hundreds of advanced features and the latest technology to keep you in touch with your customers and employees, no matter where you are or what device you use.

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What is in the Box

All of the items below are included in this box. If you are missing any items, please be sure to contact us immediately at 1-888.623.VOIP (8647).

Available Cordless Phones

CORDLESS PHONE

Put cordless phones anywhere you need them and give your employees the freedom to move around the office.

BASE STATION

Connect up to 12 phones within 150 feet using two base stations.

CORDLESS DESK PHONE

Cordless desk phones feature an enhanced speakerphone and 12 additional one-click speed dials that put your employees in control.
Connecting Your Desk Phone and Base Station

Installing the OfficeSuite® Phone system is easy and should only take a few minutes. It is important that you follow these steps in order. Instructional videos are also available by clicking on the Support tab on the MyOfficeSuite™ portal or by visiting http://MyOfficeSuite.broadviewnet.com.

1. Use the included Ethernet cable (or equivalent) to connect the base station to your Internet router or to your local area network for Internet access.

2. Use the included power adapter to connect the base station to a wall outlet.
**SYSTEM UPDATES**

From time to time, Broadview Networks will make updates to your system via software changes on our network. To ensure your system is up-to-date with the most current release of software, momentarily disconnect power from the base station (leave the Ethernet cable connected) and then reapply power. The base station will automatically download and install new software if a newer version is available. If newer software is downloading the LED will flash blue. This process takes 3 to 4 minutes and it is important that you do NOT remove power again while software is updated. Wait until the LED is steady **amber** (not blinking) for two minutes before making calls.

**DO NOT REMOVE POWER DURING THE PROCESS.** Wait until the LED on the base station glows steady **amber** for a few minutes and the phone display has returned to normal before making any calls. You may repeat this process occasionally to be sure your software is always up-to-date.

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**SET UP THE PHONE**

Connect the power adapter to the phone and plug it into a wall outlet, no more than 150 feet from the base station. Connect the short end of the phone cord to the bottom of the handset and the long end into the port on the back of the desk phone.

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**INSTALLING THE PHONE STAND**

There are two options for attaching the stand to the phone:

To have your phone display in a more upright position: Insert the connector tab on the stand with the square cutouts into the large opening on the top of the back of the phone, be sure it locks in place.

To have your phone display at a lower angled position: Insert the connector tab on the stand with the square cutouts directly underneath the large opening on the back of the phone, be sure it locks in place.

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**CONNECTING YOUR DESK PHONE AND BASE STATION**

Follow the instructions on the next few pages for **Setting Up Your Systems and Features** through the MyOfficeSuite™ portal.
Sign in to your MyOfficeSuite™ account at MyOfficesuite.broadviewnet.com with your username and password that you created when you first logged into your MyOfficeSuite™ account. If you forgot your password, you may click Forgot your password to reset it.

Once logged in, you are presented with the Dashboard from which you manage the phone system and your services. Across the top of the Dashboard is a series of tabs with different functions and in the center of the Dashboard are widgets from which you can make changes to the system and services. Each widget has an information icon describing its function. To customize the presentation of the Dashboard, click on Customize Dashboard to add, remove, or reorder the widgets according to your preference.

**Setting Up How Calls Come Into Your System**

All incoming phone calls are sent to a specific phone number in the system. Calls can be sent to individual phones, to an auto attendant, or to a call group. The first step is to make sure that your phones and phone numbers are set up the way you wish.

**Assigning Phones to Your Extensions**

OfficeSuite® Phone is so flexible that any phone can be assigned to any extension. To assign or change phones and extensions, go to the Cordless Phone widget within the MyOfficeSuite™ portal and select a location from the drop-down list at which you want to manage your cordless phones. Then, press Change Configuration.

A single phone can be assigned an extension (dedicated) or multiple phones can be assigned to the same extension (shared). All phones with the same extension will ring when the extension is called. As long as a line is available, even if a shared extension is in use, other phones with the same extension can continue to make and receive calls.

**Changing the Name Displayed on Your Phone**

To change the name displayed on any phone, click on the Phone System tab, then click on Phones and choose the Cordless Phone Manager. Select the site at which you want to manage your phones and click on Actions. Here, you will select Personalize Phones to change the name display on your phone.
CONFIRE CORDLESS PHONES

From the top tabs, select **Phone System** – **Phones** – **Cordless Phone Manager** or Select the **Cordless Phone** widget from your dashboard.

Select the site at which you want to manage cordless phones from the drop list.

If the site already has a base station registered and phones connected, it will show the registered base stations.

If the site has no base station yet, then you can register a new base station.

Once a base station is registered, manage phones at that site by dragging and dropping phones onto extensions. You can have up to 6 phones per base and up to two base stations per site. Phones connected to a base can each have their own extension, or all 6 can share one extension, or any combination of phones and extensions up to a maximum of 6.
Using the MyOfficeSuite™ portal

All six phones share one extension. Press Add a Desk Phone or Add Handset accordingly.

A mix of phones and extensions (maximum of 6).

Press Save to save all your phone and extension assignments. You will be prompted to restart the base station for the changes to take effect. Momentarily remove the power cord from the base station (DO NOT remove the Ethernet cable) and then restore power. The update make take several minutes to take effect. DO NOT REMOVE POWER DURING THE UPDATE.
After you assign phones to extensions, you may wish to personalize them with the name of the person to whom they are assigned. Press the **Actions** button and select **Personalize phones**.

From the same **Actions** menu, you can also synchronize phone settings between the server and the base station, or reset, remove, or replace a base station.

To add a second base station, enter a MAC address from the second device in the appropriate field and press **Verify and Add Base Station**.
Using Your Phone

PERSONAL PROGRAMMABLE KEYS
The cordless desk phone has twelve programmable memory keys that can be used as one-touch speed dials. To program memory keys:

Press the Menu soft key on your phone and select option 1 for Services. Then, select option 8 for Direct Access Key, followed by option 1 for Program. Select one of the programmable keys (1-12), then select option 2 for Speed Dials. Scroll to option 2 called Enter Name and use the phone keypad to enter the first 5 characters of the name. Then select option 3 called Enter Number and using the phone keypad, enter the number or extension and press Save. Repeat these instructions to program each memory key.

To make a call via the Memory Keys, long press the key, or press any one of the twelve keys to display the status of each one on the LCD screen, and then press the appropriate key to call the party.

MAKING AND RECEIVING CALLS
Your system includes unlimited calls within the office and across the United States, Canada, Puerto Rico and the US Virgin Islands. For International calls, charges apply and you must first dial 011, then the country code, then the number.

MAKING A CALL
You can make a call by picking up the handset and dialing directly or by using the programmed memory keys.

To place a call via the speakerphone, enter the number or select a record in the phonebook/call log list. Then, press the Send soft key or OK key. If the phone is assigned with a single line, it will be selected automatically to make a call. If multiple lines are assigned, the default outgoing line will be selected automatically for the call.

You can also press the Speakerphone key first and then dial the number.

MAKING A CALL FROM ANOTHER LINE
If your phone has multiple lines associated with it and you would like to use a line other than the default line, then you must select the second Line Appearance key before dialing. You may also select a record from the Calls Log or Phonebook and then press the second Line Appearance key.
USING THE SPEAKERPHONE
During any call, simply press the speakerphone icon to enable the speakerphone. The speakerphone is located on the lower right corner below the volume settings and the microphone is located below the keypad. The speakerphone is full duplex, meaning that you can have a two-way conversation instead of waiting for the other party to finish speaking.

ANSWERING CALLS
When there is an incoming call, pick up the handset and press the Accept soft key or the Speakerphone On/Off key.

If you want to continue a call in speaker mode having originally answered it via the handset, then press the Speakerphone On/Off key and return the handset to the cradle.

If Using a Headset
Making a Call: Enter the phone number and press OK or Send, then press .
Accepting a Call: Press or Reject.

REJECTING CALLS
When there is an incoming call, press the Silence soft key or Reject soft key to reject the call. When you reject a call, calls will be unanswered and are forwarded to your pre-set forwarding destination.

USING YOUR PHONE’S INTERCOM
Phones connected to the same base station can instantly connect by pressing the Menu key and selecting option 1 for services, then option 5 for intercom. Then, use the directional navigation to select the target phone (e.g., HS2, HS3, HS4) and press OK. If the other phones on your system have individual extensions, you may also opt to dial them by their three-digit extension.

CALLING ANOTHER EXTENSION ON THE SYSTEM
Instantly connect with any extensions on the system by simply dialing the extension (e.g., 102) and pressing the Send soft key or Speakerphone key. Remember that multiple phones can have the same extension, so multiple phones may be called.

MUTE
The mute button is located in the lower right corner of the phone next to the speakerphone button and below the volume controls. Press the Mute button. A microphone icon with a slash through it appears on the display. Press the button again to unmute and the microphone icon disappears.

CALL WAITING
Enable or disable your call waiting tone via the Menu key. First, select option 1 for Services, then select option 3 for Call waiting. Make your selection and press Save when you are done.

With call waiting enabled, when a second call comes in, you will hear a call waiting tone and then you can:
• Press the Accept soft key to answer the second call and put the current call on hold.
• Press the Reject soft key to reject the call and send it to your forwarding destination.

Once you’ve accepted the second call, you can switch back and forth between both callers using the Line Appearance keys or Switch soft key. To join the two parties into a 3-way call, press the Conference soft key.

TRANSFERRING A CALL
When active in a call, press the Trans soft key, then enter the full phone number of the party with the area code or three digit extension and press Trans again. The call will be transferred immediately.

If you would like to do a soft transfer so that you can announce the transfer, use the second Line Appearance key to activate a second call. Enter the phone number or extension and press OK or the Dial soft key. Wait for the other party to answer and then highlight Transfer and press OK to transfer the call to the other party.

If you have multiple phones sharing a single extension and wish to transfer a call answered on one phone to another phone with the same extension, press the 2nd Call soft key and then select Intercom from the next screen. Use the up/down navigation to select the handset number (e.g., HS2) and press OK. When the other party answers, highlight Transfer and press OK.

CONFERENCE OR 3-WAY CALLING
When active in a call, select 2nd Call, then External Call. Enter the number of the party to conference and press the Dial soft key. After the call is answered, press the Conf soft key to activate the 3-way conference:

To remove the second party during the call, press the Split soft key and select Release. This will drop the second party and you will remain connected to the first caller.
To remove yourself from the conference and allow the other two parties to continue, press the Split soft key and then select Transfer. You will be dropped from the call and the other two parties will remain connected.

CALL HOLD
To put an active call on hold, press the Hold soft key or the second Line Appearance key. To take the call off hold, highlight Unhold or the first Line Appearance key.

The OfficeSuite® system has many unique features that can be accessed from your phone services menu. To review, edit, or activate these features, click OK on your phone and then select one of the options below.

DO NOT DISTURB
Use the Do Not Disturb feature when you do not want your phone to ring, like during a meeting or when a project is due. Press Menu and select option 1 for services and option 2 for DND, then the account you want to enable/disable DND, then choose the extension you want to enable or disable DND. Press Save to confirm. A DND icon will appear on the phone's LCD screen. All incoming calls will be rejected on this phone until DND is disabled by following the same instructions to turn it on.

You can also turn on Do Not Disturb from the MyOfficeSuite™ Portal. To do this, click the toggle button to on from the Do Not Disturb widget.

Note: Only the master phone on the line may enable/disable DND.

CONTACTS
OfficeSuite® allows you to have a Private Phonebook (phone only) and a Shared Phonebook (for all phones on the system). To access the phonebook, press Menu and select option 2 for Contacts and then select the phonebook you would like to access. You can quickly add, edit, or dial entries in the phonebook.

CALENDAR, ALARM AND NOTES
Use the calendar icon to access the calendar features or to set up an alarm based on time and date. You can also add, edit, or delete notes that you may have saved.

CALL LISTS AND CALL LOGS
The Call List or Logs features allows you to see Missed Calls, Outgoing Calls and Accepted Calls. The Outgoing Calls List can be accessed by pressing the Redial key. The Missed Calls List can be accessed by pressing the Missed Calls button on the phone. You can also press the Logs soft key and then select from all three call lists, or you can press Menu and select option 3 for Calls List. Within any of the calls lists, you may scroll up and down to find the desired party and press the Options soft key to save the number in the phonebook, view the call record, or delete one or all of the records. Finally, you can dial from the calls list by pressing option 5 for Predial and then the Send soft key.

MULTI-DESKING
Multi-desking allows you to log into up to 5 different devices at one time. You can be logged into your cordless handset, your desk phone and your mobile phone all at once! Refer to the MyOfficeSuite™ Administrators Guide for more information about multi-desking.

SETTING UP YOUR TIME AND DATE
The Time and Date is synchronized automatically with Broadview's network. If you would like to edit these settings manually, press Menu and select option 5 for Settings, then select option 1 for Time and Date. From there, you can select Automatic or Manual setting, as well as the date and time format, by following the prompts.

SYSTEM SETTINGS
The System and Status settings found on the phone's menu may be used when troubleshooting issues with a Broadview support representative. DO NOT MAKE ANY CHANGES TO THESE SETTINGS UNLESS INSTRUCTED TO DO SO.

FINDING A MISPLACED PHONE
If you have misplaced a handset, it is easy to page your phones to find the handset. Press and release the Page key (white phone icon) on the side of the base station. This will ring all handsets.

Note that the phones must have battery power in order for this feature to work.
WE ARE HERE TO HELP! PLEASE CONTACT US AT:

Phone: 1-888.623.VOIP (8647)
Email: officesuitesupport@broadviewnet.com
Live Help: Chat live with Broadview for help via the portal.
Just click on Help Chat on top of the MyOfficeSuite™ Dashboard

http://MyOfficeSuite.broadviewnet.com