MAX Communication Server

Polycom VVX User Guide

November 2019

This guide is provided for end-users. It shows the basics of using Polycom VVX model phones with MAXCS Release 8.5 and later.

Before you can use your Polycom phone with MAXCS clients, your administrator must configure your phone to work with MAXCS system.

Refer to the documentation that came with your Polycom phone to connect the cables and power supply to your phone, and for any other basic phone information.

Note: MaxCS supports the Polycom D60 handset configured with a single VVX extension; refer to the separate guide, *MaxCS Polycom D60 Configuration Guide*, for details.
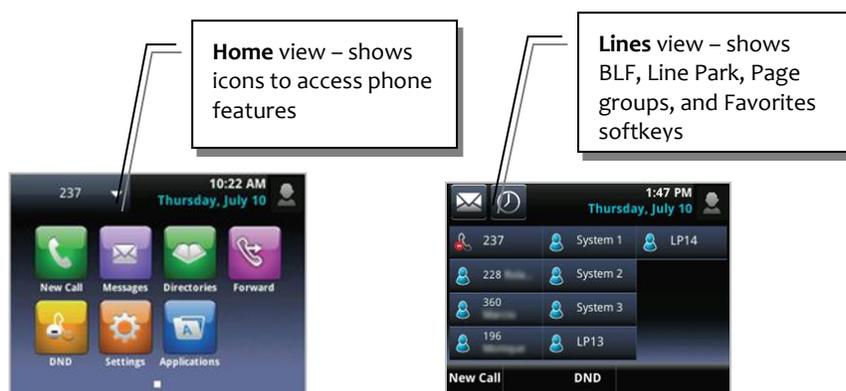
Logging In

Your administrator has configured your Polycom phone for you. When you plug in your phone, you may see a message asking you to press some keys to register the phone. If you see this message, follow these steps to have your phone download the correct settings:
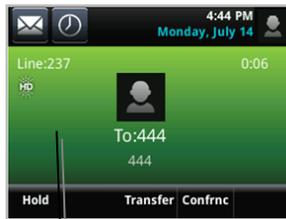
1   Press the **Speaker** button or pick up the handset. You should hear a dial tone.

2   Press **# 1 7**.

3   When you are prompted, enter your extension number and your voicemail password.

4   Follow any remaining prompts that appear.

The phone should restart and then download your system information and any features that your administrator has configured for you. Some phone models will restart more than once; the entire download process, including any restarts, can take up to four minutes to complete.

Views

Press the phone's **Home** key to switch among the various views.

Home view – shows icons to access phone features

Lines view – shows BLF, Line Park, Page groups, and Favorites softkeys

Active Call view – shows only the active call

Calls view – shows all calls

Softkeys

Several softkeys appear throughout the views:

 Calls the number

 Opens information about the entry

 Edits details of the entry

 Deletes the entry

Be aware that some VVX models have softkeys on the touch screen; other models have physical keys to press. If your model is not a touch-screen model, press the physical phone button instead of a softkey.

Answer Incoming Calls

There are several ways to answer an incoming call.

1   Press the **Speaker** button, pick up the handset, or tap **Answer**. (To reject the call, tap **Reject**.)

2   To end the call, press the **Speaker** button or hang up the handset. On some models, you can tap **End Call**.

Note: You cannot tap the **Forward** softkey to forward an incoming call.

With multiple calls, if you pick up the handset, you will answer the first incoming call. However, if you press the **Answer** button, you will answer whichever call is highlighted.

Make Outgoing Calls

To place a call, you can start dialing the number from any screen. As you type, the phone automatically checks your Directory and Call Log to auto-filter entries to find the contact. Once you see the contact, you can tap it to dial (or press the key beside it).

You can also use the softkeys to place calls:

1 Tap **New Call**.

2 Enter the number and tap **Call**.

To place a call from an entry in your Directory,

1 Tap **Directories**.

2 Tap an entry in your Directory.

3 Tap the green softkey to place the call.
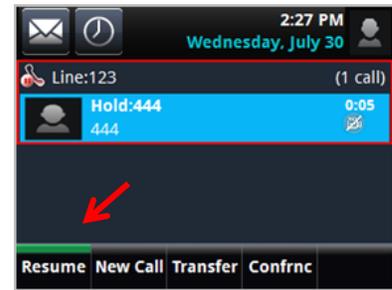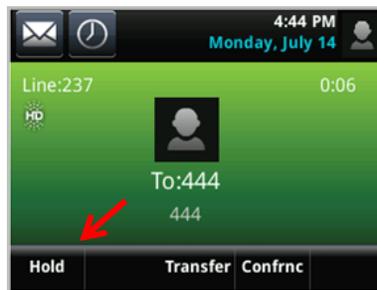
To place a call from an entry in your Recent list,

1 Tap **Directories**.

2 Tap **Recent**.

3 Tap the entry to place the call.

You can add contacts as *Favorites,* so that you can tap the name to call from *Lines* view.

Place Calls on Hold

1 Tap **Hold**.

2 To pick the call up again, tap the call and tap **Resume**.
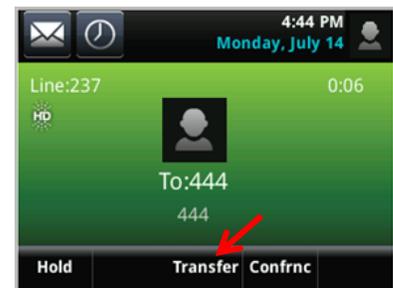
Transfer Calls

The method for transferring a call will vary, depending upon your intent:

- When transferring a call to a live person and you want to introduce the call before switching it over, use what is commonly referred to as a *Supervised transfer*.

- In all other scenarios, we recommend that you perform a *Blind transfer* instead of a *Supervised* transfer. This includes transfers to Workgroup queues, voicemail systems, and so on.

If your administrator has assigned a *Polycom Advanced Features* license to your extension, see page 11 for more options.

Supervised Transfers

1 While on a call, tap **Transfer**. The call is placed on hold.

2 To use the dial pad, enter the number.

To use the Directory, tap **Directory**, and tap the entry.

To use the Favorites list, tap **Directory**, tap **Favorites**, and then tap the entry.

3 Tap the green **Call** softkey.

4 After speaking with the recipient, tap **Transfer**.

Blind Transfers

1. While on a call, tap **Transfer**. The call is placed on hold.

2. Tap **Blind**. (On some VVX models, you must tap **More** and then tap **Blind**.)

3. Enter the extension number or choose the number from the Directory or Favorites list.

4. Hang up; the call will automatically transfer. You do not need to wait to hear ringing on the line.

To cancel a transfer in progress:

- VVX 310/400 – Tap **Cancel**. You automatically reconnect to the call.

- VVX 500/600 – Tap the red phone icon. You automatically reconnect to the call.

Notes:

With Polycom phones, you cannot make the following types of transfers. If you try to make these types of transfers, then the call will remain on your extension, on hold.

- You cannot transfer a call to a personal or workgroup queue (in other words you cannot transfer a call to a workgroup with no available agents

- You cannot transfer a call to a line park, voicemail, or AA

- Your phone has a default transfer mode (Supervised or Blind). Refer to your phone's documentation to learn how to set this. To make a transfer of the non-default type, perform a long-press on the Transfer key.

Transfers to an Extension's Voicemail

1   Tap **Transfer**. Press **# 1 8**.

2   Enter the user's extension. In other words, to transfer a call to extension 912's voicemail, enter **9 1 2**.

3   When prompted, you can either press **Transfer** again or hang up.

Make Conference Calls

If your administrator has assigned a *Polycom Advanced Features* license to your extension, see page 11 for more options.

1   Call the first conference member.

2   Tap **Conference**.

3   Call the next participant and tap **Conference**.

4   To add additional participants (up to six participants per conference call) tap **Hold**, dial the number, and tap **Join**. (Do not use the **Conference** key after the third participant has joined.)
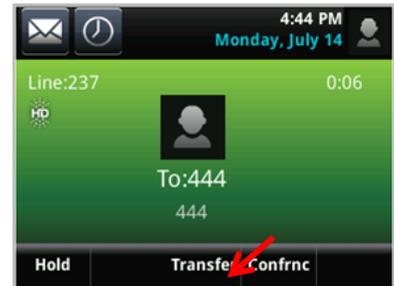
If you have *joined* a conference call on a Polycom phone, (in other words, if you did not initiate the conference call) to add another member you must tap **Join** instead of tapping **Conference**.

You can also tap **Join** to join together one held and one active call.

Notes:

If the conference initiator hangs up the call and there are only two parties left on the conference call, then the call reverts to a direct call.

However, if the conference initiator is one of the two remaining callers, the call will remain a conference call. In this scenario, neither party can transfer the call to another party. If the conference initiator wants to transfer the call, the initiator must conference in the other party and then drop off.
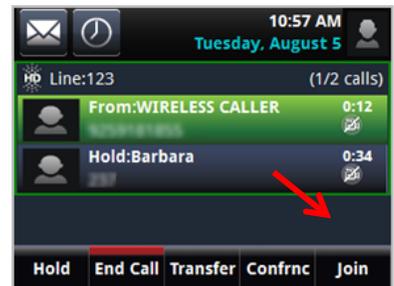
Work with the Directory

Tap **Directories** to open the screen.

Favorites – Numbers you add to this list appear as softkeys in *Lines* view.

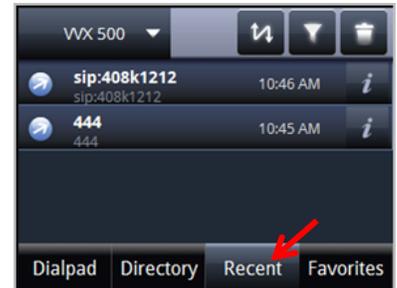**Recents** – Shows your recent calls.

To save a recent call to your Directory,

1   In Home view, tap **Directories**.

2   Tap **Recent**.

3   Tap the *Information* icon beside the entry that you want to save.

4   Tap the *Edit* icon. Edit the name and any other information.

5   Tap **Save.**

To manually enter a contact,

1   Tap **Directories**.

2   Tap the plus sign.

3   Enter the information and tap **Save**.

If you need to update information in the Directory, find the entry and tap the pencil icon to edit the fields.

Set Up Favorites (Speed Dial)

Favorites are like Speed Dial entries. When you add a contact as a Favorite, you add a softkey for that contact to the phone's *Lines* view.

1   In *Home* view, tap **Directories**.

2   Tap the entry in your Directory.

3   Tap **Add to Favorites**.

4   Tap again to accept the assigned softkey slot.

The contact will now appear in *Lines* view.

To add a recent caller as a Favorite,

1   In *Home* view, tap **Directories**.

2   Tap **Recent**.

3   Tap the *Information* icon beside the entry that you want to save.

4   Tap **Add to Favorites**.

5   Tap again to accept the assigned softkey slot.

Manage Multiple Calls

In order to handle multiple calls, your Administrator must enable your Enable *Multiple Call Waiting* or *Enable Live Call Handling* option.

Your Polycom phone can handle multiple calls in a 'queue.' You can switch from one call to another, and even join several queued calls into a conference call.

If you are on a call and a second call comes in, the call will appear on your phone in a ringing state. After no answer, the call will go into a waiting queue; you will see the call in *Lines* view.

To accept the incoming call and place the current call on hold, tap **Answer**.

To send the incoming call to your extension's "Ring No Answer" handling rule, tap **Reject**.
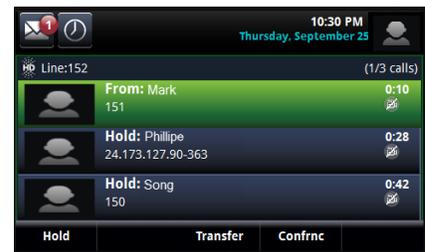
Switch Phone Locations

If you have several work locations with phones assigned to you, you can switch your extension between them as needed. For example, you may have one phone at work and one phone at home.

To switch your extension to your other phone,

1   On the Polycom phone, tap #17.

2   When prompted, enter your extension and password.

MAXCS will verify your credentials, log your extension off of the previous phone, and then reboot this phone.

Work With Voicemail Messages

To hear voicemail messages,

1   In *Home* view, tap **Messages** and **Message Center**. (Or tap the envelope in the upper corner.) Some models have a Voicemail key.

    You see a breakdown of Urgent, New, and Old messages.

2   Tap **Connect.**

3   Enter your password and respond to the prompts in the voicemail system.
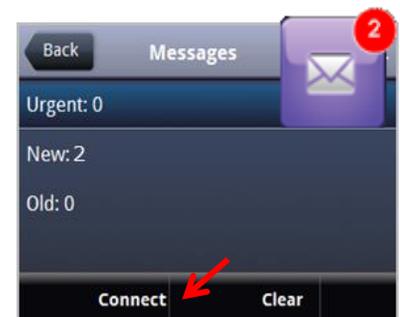
The Old Message count on Polycom phones is equivalent to MAXCS Total – MAXCS New count.

Advanced Features

If your administrator assigned a *Polycom Advanced Features* license to your extension, you have many additional features to work with.

For example, with a *Polycom Advanced Features* license, your clients are now synchronized with your Polycom phone. For example, regardless whether you used the client or your phone to place a call on hold, you can retrieve the call from either the client or your phone.

DND Synchronization (Advanced Features License required)

When you toggle *Do Not Disturb* mode on and off via the phone display or via MaxAgent or another client, all devices and clients will synchronize the DND status.
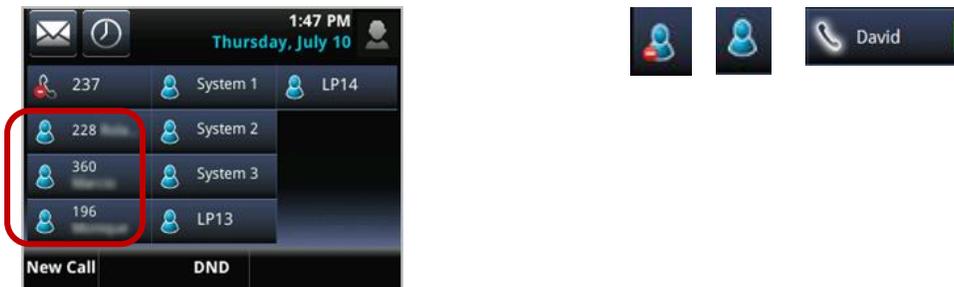
When you tap **DND**, the line icon in *Home* view shows a red circle.

To turn DND off, tap the **DND** softkey on the phone or turn it off via your MAXCS client.

Line Monitoring / BLF (Advanced Features License required)

If your administrator configured your extension to monitor other extensions, you will see those monitored extensions as softkeys in *Lines* view.

- Red LED - That extension is connected to a call (or the extension is not registered with MAXCS yet)
- No LED - That extension is idle
- Green flashing LED – That extension is ringing

When a monitored extension is ringing, tap its softkey once to pick up the call. Tap only once - tapping twice will connect and then immediately disconnect the call.

If your Administrator configured a "Splash Display" feature for you, you will briefly see an alert on your phone when the monitored extension rings.

You can call a monitored extension by tapping it.

When a monitored extension is ringing, you can take these actions (if the administrator enabled the *Splash Ring* feature for you):

- Tap **Pickup** to answer the incoming call
- Tap **Ignore** to dismiss the ring display and silence the ring
- Tap **Silence** to silence the ring
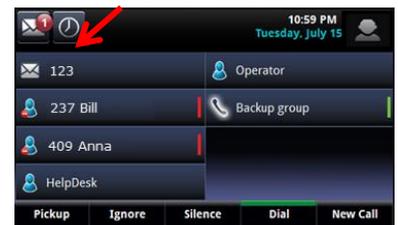
Notes:

- Your administrator can set a Global extension as a BLF softkey for your phone. However, you will be able to only *monitor* that global BLF; you will not be able to *answer* a Global BLF call by pressing that BLF button.

- If you tap a BLF softkey twice (the second time when the phone is ringing), the call may be disconnected.

Expanded Conference Methods (Advanced Features License required)

Users with a *Polycom Advanced Features* license assigned to their extension have additional ways to join and initiate conference calls within MaxAgent, MaxOutlook, MaxCommunicator, and AltiConsole.

Initiate an Ad-Hoc Conference

Method 1: Conference button

1 Call the third party.

2 Highlight the connected call and click **Conference**.

3 Select one of the conference entries on hold and click **Conference**.

Method 2: Conference button

1 Call the third party. Put the call on hold.

2 Highlight the call on hold and click **Conference**.

Method 3: Right-click menu

1 Call the third party. Put the call on hold.

2 Right-click the call on hold and select **Join To Conference**.

Method 4: Drag & Drop (not supported by AltiConsole)

1 Call the third party.

2 Drag a connected call entry onto a call on hold, or drag a call on hold entry onto a connected call entry.

Join a Call to an Existing Conference

Method 1: Conference button

1 Call the next party.

2 Highlight the connected call.

3 Click **Conference**.

Method 2: Right-click menu

1 Call the next party.

2 Right-click the connected call and select **Join To Conference**.

Method 3: Drag & Drop (not supported by AltiConsole)

1 Call the new party.

2 Drag the connected call entry onto any of the hold conference entries.

Expanded Transfer Methods (Advanced Features License required)

Users with a *Polycom Advanced Features* license have additional ways to transfer calls within MaxAgent, MaxOutlook, MaxCommunicator, and AltiConsole.

Blind Call Transfer

With a *Polycom Advanced Features* license, you have additional ways to perform a blind transfer.

Method 1: Transfer button

1 Highlight the connected call.

2 Enter the number or contact in the dial pad to indicate where to transfer the call.

3 Click **Transfer**. (In AltiConsole, click **Blind Transfer**).

Method 2: Right-click menu

1 Highlight the connected call.

2 Right-click a dialable entry and select **Blind Transfer**.

Method 3: Drag and Drop, Directory tab

- Drag a call to an extension on the *Directory* tab. This will perform a blind transfer.

Supervised Call Transfer

With a *Polycom Advanced Features* license, you have additional ways to perform a supervised transfer.

Method 1: Transfer button

1 Call the third party.

2 Highlight the call on hold.

3 Click **Transfer**.

Method 2: Transfer button (not supported in AltiConsole)

1 Call the third party. After discussion, place that call on hold.

2 Pick up the other call.

3 Highlight the connected call.

4 Click **Transfer**.

5 Select the transfer target from the list of calls on hold.

6 Click **Transfer**.

Method 3: Right-click menu

1 Call the third party.

2 Right-click the call on hold and select **Call Transfer**.

3 Right click the original call (which is on hold) and select **Transfer**.

You can also transfer calls to other calls that are on hold:

- While on a call, if you highlight *a call on hold* and press **Transfer**, the held call will be transferred to the current call.

- If you highlight *the connected call* and press **Transfer**, the system will open a pop-up listing the calls on hold. The user can select one of those on-hold calls to complete the transfer.

Directory Dialing (Advanced Features License required)

You can choose contacts from a company directory to place calls, transfer calls, and perform other basic functions.

In order to use this feature, your administrator must set up one or more company directories, and must enable your extension for directory dialing.

If your administrator enabled company directory dialing for you, you can tap the **Directory** softkey to display contacts within the directory. You can also search the directory to find a contact.

Note   Your company directory is different from the standard "Directories" button on Polycom phones, which shows recent calls.

Using the Company Directory to Transfer Calls

To use the Directory to transfer a call to another contact, follow these steps.

1. While on the active call, select **Directory**. Navigate the list to locate the transfer target, but **do not** select that entry.

2. If your phone is a model VVX 300, VVX 400, or VVX 1500, press the physical **Transfer** key on the phone.

   If your phone is a model VVX 500 or VVX 600, press the **Home** button a few times until the Transfer soft key appears along the bottom of the display. Then tap the **Transfer** softkey.

3. Press the **Home** button and select **Application**. If you performed step 2, the Directory page will open to show the target extension. If you did not perform step 2, you will need to scroll to find the target extension.

4. Choose the target extension and select the "call" softkey. The line will ring. Either wait for the agent to pick up the call and then choose **Transfer** (for a *Supervised* transfer), or choose **Transfer** while the line is ringing for a *Blind* transfer.

We recommend that you perform step 1 to avoid hearing a constant dial tone while searching for the contact in step 4.

Using the Directory to Conference Calls

To use the company directory to choose a contact for a conference call, follow these steps.

1. While you are on a call, select **Directory**. Navigate the list to locate the contact, but **do not** select that entry.

2. If your phone is a model VVX 300, VVX 400, or VVX 1500, press the physical **Conf** key on the phone.

   If your phone is a model VVX 500 or VVX 600, press the **Home** button a few times until the Conf softkey appears along the bottom of the display. Then tap the **Conf** softkey.

3. Press the **Home** button and choose **Application**. If you performed step 2, the Directory page will open to show the target extension. If you did not perform step 2, you will need to scroll to find the target extension.

4. Choose the contact and tap the "call" softkey.

We recommend that you perform step 1 to avoid hearing a constant dial tone while searching for the contact in step 4.

Call Record Button (Advanced Features License required)

If your administrator has enabled a Record softkey for your extension, you can record calls by tapping a button on your phone. To record a call in progress, tap the **Record** softkey, and then tap **Record** on the next screen.

Line Park (Advanced Features License required)

To park a call,

1   While on a call, press the **Home** button to switch to *Home* view.

2   Tap any **Line Park** softkey to park the call on that line. Note that you will not hear a confirmation announcement.

   If your Administrator configured a "Splash Display" feature for you, you will see an alert with the caller name, and you may hear a ring tone for a few seconds.

3   When you are ready to retrieve a parked call, tap **Pickup**.

While a call is parked:

- The Line Park softkey will flash green.

- You can tap and hold that **Line Park** softkey to reveal the Caller's information.

- You can tap **Ignore** to dismiss the ring display and silence the ring, or tap **Silence** to silence the ring.

Transfer a Line-Parked Call (Advanced Features License required)

See the discussion on page 6 about *Supervised* transfers versus *Blind* transfers. The same guidelines apply when transferring line-parked calls: to speak with the recipient, use a *Supervised* transfer; in all other scenarios, use a *Blind* transfer.

To transfer a line-parked call in cases where you need to speak with the recipient before releasing the call (a *Supervised* transfer), follow this procedure.

1   After picking up the call, tap **Transfer.**

2   Tap **More.** Tap **Number.**

3   Enter the extension number or choose the number from the Directory or Favorites list.

4   After speaking with the recipient, tap **Transfer**.

To perform a *Blind* transfer:

1   After picking up the call, tap **Transfer.**

2   Tap **Blind**. (On some VVX models, you must tap **More** and then tap **Blind**.)

3   Enter the extension number or choose the number from the Directory or Favorites list.

4   Hang up; the call will automatically transfer. You do not need to wait to hear ringing on the line.

Paging (Advanced Features License required)

If your Administrator included you in a Polycom paging group, you can page other Polycom users in that group.

Be aware that Polycom paging works *only* between Polycom phones that are on the same network.

- Group 1 is the default, and appears at the top of the paging group list.
- Group 24 (Priority group) will override any active calls.
- Group 25 is the Emergency paging group.
- Other paging groups that your Administrator has set up are numbered 2-23.

1 In Lines view, tap **Paging**. (This softkey is enabled only if you Administrator added you to Polycom paging groups.)

2 Tap the paging group that you want to page.

3 Tap **Page**. Wait a few seconds, and then begin speaking.

4 When you finish speaking, tap **End Page**.

If you receive a page, your phone will play a brief tone, and then you will hear the page.

Auto-Answer via Clients (Advanced Features License required)

You can configure MaxAgent, MaxCommunicator, AltiConsole, and MaxOutlook to automatically answer or place calls.

This Auto-Answer feature is available only when the **Use Polycom phone to make or answer calls** option is enabled by your administrator.

If your administrator has enabled the option for you, you can adjust two aspects of this feature.

Customize How Quickly Calls Are Answered

The first aspect that you can customize is how quickly calls should be answered. You set this in your client application.

- In AltiConsole, the Auto-answer setting is under **Setup** > **General**.
- In MaxAgent and in MaxCommunicator, the Auto-answer setting is under **Configuration** > **Extension** > **Call Handling**.
- In MaxOutlook, the setting is **Configuration** > **General**.

Check the **Automatically answer after xx seconds** option, and then enter how many seconds the application should wait before answering calls. Note that there may be a few seconds (3-4) of delay answering calls with this feature.
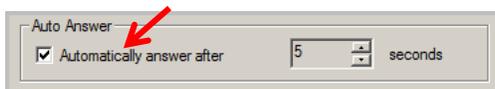
Customize Whether Calls Are Directed to the Speaker or a Headset

The second aspect of this feature that you can customize is whether you want calls to be answered by the phone's speaker or by a headset. By default, calls are directed to the Polycom phone's speaker.

To switch call answering to your headset, press the **Headset** button twice while the phone is idle. The Headset button will begin to blink slowly, to indicate that calls will be answered by the Headset.

To switch call answering back to the speaker, press the **Speaker** button. (There are two other methods you can use to make this change: You can pick up the handset or press the **Headset** button once.)

If you are not sure which path the phone is using, just look at the Headset button; if it is slowly blinking, calls will be directed to the headset. If it is not blinking, calls will be directed to the phone's speaker.

A last note: When you have an incoming call, pressing the Headset button will answer the call but will not reset the answer path to the headset.

Polycom Expansion Module

MaxCS now supports the Polycom VVX Expansion Module, which is a third-party device that is sold by Polycom to work with their model VVX IP phones.

The BLF slots that your administrator has configured for you will overflow from the VVX phone onto the expansion module. In other words, the BLF slots will fill up all available slots on the Polycom phone's LCD display first, then will begin filling up the expansion module

Line Park blinking on the expansion module can become erratic under some specific conditions:

- Line Park can handle a reasonable amount of traffic on the extension being monitored. If the call volume is too high, it will cause high CPU usage and impact the usability of the phone.

- When you answer a call, a popup message may block your BLF and Line Park screens. Press the **Home** button one or more times to switch to the background and to other screens.

- If you have a parked or BLF call, you can press the **BLF/Line park** key for 3 seconds to see the caller ID of the BLF ringing or parked call.

- If your phone switches to power saving mode too often, open the phone's menus and select **Setting** > **Basic** > **Power saving** and adjust the office hours and timeout settings to the maximum value. This will reduce the frequency of the phone switching to power saving mode.

Making Video Calls

Your administrator can enable your phone to make video calls. MaxCS supports video calls on the following Polycom IP phones.

- VVX500
- VVX600
- VVX1500

Refer to the documentation that came with your Polycom phone for instructions on making video calls.

Notes:

- If two Polycom phones are on a video call and one phone conferences in a third participant, you will lose the video. Video will not return even when the third participant drops out of the conference.

- If you transfer a video call to another party, the video will freeze while you are making the transfer. Click **Stop/Start** to resume the video.

General Notes

Following are some general notes about using your Polycom phone with MAXCS clients.

- When an inbound workgroup call is directed to you while you are placing an outbound call, you may not be able to detect the incoming call, and the call will be considered a "Missed" call. This is due to a limitation of Polycom phones, which are designed to not present calls while an outbound call is underway. To alleviate this *missed call scenario*, set your Presence to "*Not Ready*" before you initiate an outbound call.

  In addition, if you place an outgoing call from a Polycom IP phone by dialing the entire string, FIRST, before going Off-Hook, then this too will prevent the issue from occurring. Note: This issue only occurs for inbound calls on Polycom IP phones, when you are off-hook and entering a dialing string to make an outbound call, and then receives a new inbound call to the Polycom phone.

- Some Polycom phone models may respond to your input a bit slowly; please give the phone time to process the digits that you have entered.

- If you have a model VVX 300 or 400, you will not see a **Transfer** or **Hold** softkey. Instead, use the phone's physical buttons for those actions.

- The following feature codes do not work on Polycom phones: #12, #26, #27, #44, #45, #46, #81, #82.

- Some feature codes are not supported for Speed Dial.

- The following features can only be configured from the phone itself: Speed Dial and Admin-defined numbers.

- The Distinctive Ring Tone feature of MaxCS is not supported.

- Forwarding calls is not supported.