MAXCS
Polycom® SoundPoint Phone User Guide

This guide shows how to use the following Polycom® SoundPoint model phones with MAXCS Release 8.5 (and later) client applications.

- IP331
- IP450
- IP550*

- IP560*
- IP650*
- IP670*

These models support advanced features via the MAXCS Polycom Advanced Features license.

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 to your phone, and for any other basic phone information.

Some SoundPoint models offer softkeys; unless otherwise noted, press either the softkey or the physical phone key as noted in this guide.

Known Limitations

- 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.

- 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.

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.

Navigation

To scroll, use ▲ or ▼ .

To move between menu levels, use ◀ or ▶ .

To disable or enable a setting, use ◀ or ▶ .

To enter data or select an entry, press ✓ .

To delete a character, press ✕ .

Answer Incoming Calls

To answer an incoming call,

1   Press **Answer**, press **Speaker,** or pick up the handset. If you have a headset connected, press **Headset**.

2   To end the call, press **Speaker** or hang up the handset. If you are using a headset, press **Headset**.
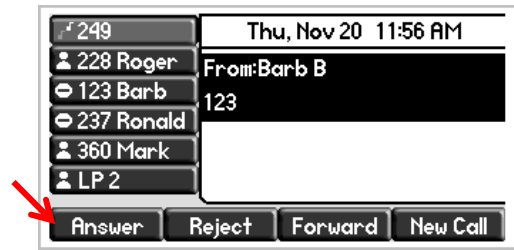
Make Outgoing Calls

To place a call, press **New Call**, lift the handset, or press **Speaker** and start dialing.

If you have a headset connected, press **Headset** and start dialing.

To place a call from an entry in your Directory (more on the Directory on page 4),

1   Press **Directories**. Select **Contact Directory**.

2   Select the entry and press **Dial**.

To place a call from an entry in your Call List,

1   Press **Directories**. Select **Call Lists**.

2   Select either **Missed Calls**, **Received Calls**, or **Placed Calls**.

3   Choose an entry and press **Dial**.

Place Calls on Hold

To place an active call on hold,

1   Press **Hold**.

2   To retrieve the call, press **Resume**.

Transfer Calls

Note: When transferring calls to or from a Polycom phone, in some scenarios the Caller ID will show as your caller ID instead of that of the original call.

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

- •   When you are 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.

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

Supervised Transfers

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

2   Call the person to whom you want to transfer this call.

3   After speaking with the recipient, press **Transfer** again.

To cancel a transfer, press **Cancel**. You will automatically reconnect with the call.

Blind Transfers

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

2   Tap **More**. 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.

Conference Calls

To initiate a conference,

1   Call the first conference member.

2   While connected, press **Conference**. The active call will automatically be placed on hold.

3   Call the next participant and press **Conference** again.

4   To add additional participants (up to 6 participants per conference call), repeat these steps.
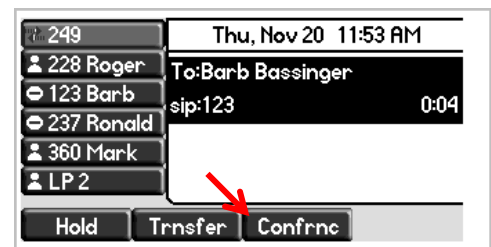
Directory

To enter names and phone numbers in the Directory you will use the number keypad:

- Toggle between the three entry modes (numbers, uppercase letters, and lowercase letters) by pressing the **I/A/a** key. The top line of your display will indicate your current entry mode.

- To move to the next field, press the down arrow key.

To add a contact to your Directory,

- Press **Directories**. Select **Contact Directory**.

- Select **More**. Select **Add**.

- Enter the contact's name. Press down arrow to move to the *Last Name* field.

- Press the **I/A/a** key to switch to number entry mode for the *Contact* (phone number) field.

- (Optional) Specify a speed dial number.

- Press **Save**. Press **Directories** to close the menus.

To save a recent caller to your Contact Directory,

1. Press **Directories**. Select **Call Lists**.

2. Select either **Missed**, **Received**, or **Placed Calls**.

3. Select the entry that you want to save.

4. Select **More**. Select **Save** to store the contact in to your Directory.

5. Press **Directories** to close the menus.

Multiple Call Handling

If your administrator has enabled *Multiple Call Waiting* for your extension, then 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 new call comes in, the incoming call will appear on your phone display.

To answer the new call, select it and press **Answer**. The first call will automatically be placed on hold.

If you do not answer the incoming call, it will follow your extension's *Ring No Answer* call handling rules.
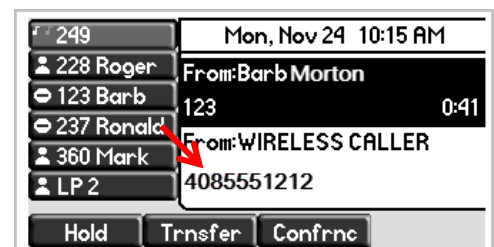
Station Login

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.

Before you can use this feature you must have already completed the initial configuration of the Polycom phone, including the MAXCS server address and third-party phone password.

To switch your extension to your other phone, follow the process described on page 1.

Voicemail

To hear voicemail messages,

1   Press **Messages**.

2   Select **Connect**.

3   When prompted, enter your password and respond to the prompts in the voicemail system.
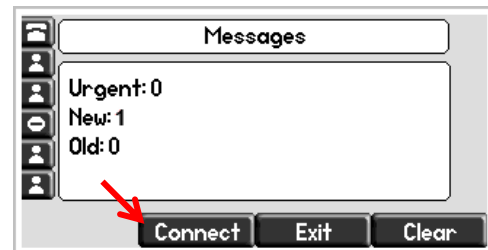
Advanced Features

Some models support extra functionality, if the phone has been assigned a MAXCS *Polycom Advanced Features* license:

- Polycom paging
- DND Synchronization
- BLF / Line Monitoring
- Line Park

Paging

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

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

- Group 1 (the default) 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.
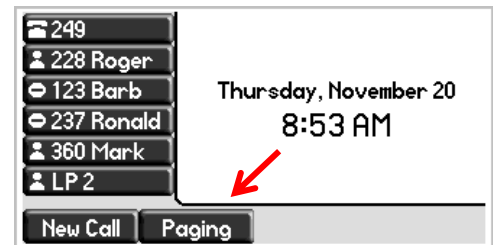
To send a page,

1   Press **Paging**. (If you do not see this key, then your Administrator has not configured paging for your extension.)

2   Select the group that you want to page. Press **Page**.

3   Wait a few seconds, and then begin speaking.

4   When you finish speaking, press the **End Page** button.
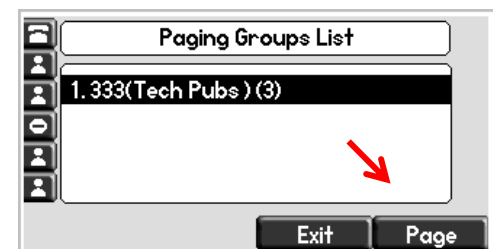
If you receive a page, your phone will play a brief tone, and then you will hear the page.

DND Synchronization

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.

To turn on DND,

1   Press the **Do Not Disturb** button.

2   To cancel your DND state and accept calls again, tap the button again.

Line Monitoring / BLF

If your administrator configured your extension to monitor other extensions, you will see those extensions on your display.

Your extension (if you have enabled *Do Not Disturb*, you will see an X here).

Monitored extensions (4)

Line Park slots
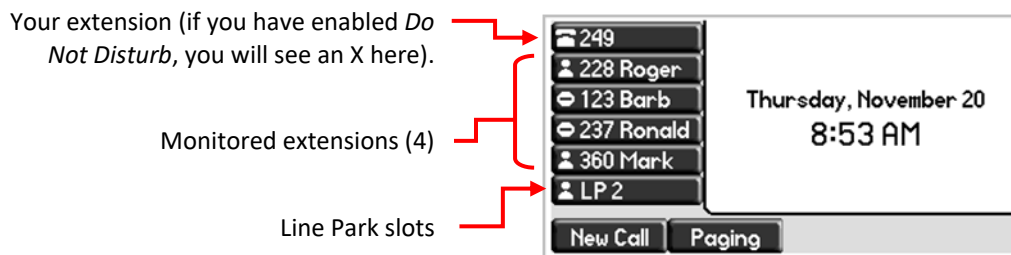
Colors indicate the state of each monitored extension:

- Fast flashing green—The extension has an incoming (ringing) call.
- Solid red—The extension has an active call.

⊖ – This symbol on your screen indicates that the extension is not registered to the MAXCS system.

To pick up an incoming call to a monitored extension, press the key for that extension.

To dial a monitored extension (when the line is not ringing), press the key for that extension.

Note: Pressing the BLF key twice will place the call on hold.

Line Park

To park a call,

1   While on a call, press any available **Line Park** button.

2   When you are ready the retrieve the parked call, press the **Line Park** button again.