POLYCOM CALL PROCEDURES SUMMARY

This document provides instructions for completing the common call-processing procedures using the <u>*Polycom phones*</u> *and the Voice-Axis software on our hosted platform. The following tasks are covered. For complete instructions refer to the Polycom User Guide for your specific phone model.*

1. TRANSFER A CALLER DIRECTLY TO A USER'S VOICEMAIL TO LEAVE A MESSAGE

Press either the **TRANSFER** softkey or the **TRANSFER** button if one is present

Press **BLIND** softkey

Enter the **#** of the mailbox followed by the ***** key

Press **DIAL or SEND**

Hang up and the caller will be transferred and will be listening to the greeting, which proceeds leaving a message.

2. TRANSFER A USER DIRECTLY TO HIS OR HER OWN VOICEMAIL BOX TO RETRIEVE MESSAGES.

Press either **TRANSFER** softkey or **TRANSFER** button if one is present

Press **BLIND** softkey

Enter ***5000**

Press **DIAL or SEND** and the caller will be transferred to the voicemail system

The caller will be prompted for the # of the voice-mail box

The caller will be prompted for the voicemail box password (if one is programmed)

Messages will be played. Use the following prompts for navigation.

> Press 3 for advanced options
> Press 4 to hear the previous message
> Press 5 to repeat the current message
> Press 6 to hear the next message
> Press 7 to delete the current message
> Press 8 to forward the current message to another user

3. RETRIEVE YOUR OWN VOICEMAIL MESSAGES FROM YOUR OWN PHONE.

A. From Polycom 321, 331 and 335 phones

Press **✻** followed by the **#** of the voicemail box

The caller will be prompted for the voicemail box password (if one is programmed)

Messages will be played: Same prompts as #2 above.

B. From Polycom 450, 550, 560, 650, and 670 phones

Press the **MESSAGE** button, enter password when prompted and messages will be played

Same prompts as #2 above

4. RETRIEVE YOUR OWN VOICEMAIL MESSAGES FROM ANY PHONE ON THE SYSTEM

Press **✻** key followed by your extension **#.** Messages will be played. Same prompts as #2 above.

5. RETRIEVE YOUR OWN VOICEMAIL MESSAGES FROM OUTSIDE THE SYSTEM.

Dial into the system and access any auto-attendant

Press **#** key

The caller will be prompted for the voicemail box #

The caller will be prompted for the voice-mail box password (if one is programmed)

Messages will be played. Same prompts as #2 above.

6. TRANSFER A CALL TO A SPECIFIC EXTENSION OR GROUP.

Press **TRANSFER** soft key or **TRANSFER** button if one is present

Select either **BLIND** softkey or **NORMAL** softkey

Enter the # of the extension to which you want transfer the call

Pres **DIAL or SEND**

If you selected **NORMAL**, you will be able to announce the call (screened or supervised transfer)

> Once announced you can hang up to initiate the transfer

> Press the **CANCEL** softkey to reject the transfer and return to the caller

If you selected **BLIND** the call will be transferred to the designated extension and you can hang up.

7. CREATE A THREE-WAY CONFERENCE CALL.

When a call is in progress, a **CONFERENCE** softkey should appear.

Press **CONFERENCE** softkey to get a 2nd dial tone

Dial the 2nd number

Press **DIAL or SEND** to connect to the 3rd party and a **CONFERENCE** softkey should appear after the third party is on the call.

Press **CONFERENCE** softkey to create the a 3–Way conference

When conferenced, a **SPLIT** softkey should appear

To end the conference and/or remain with only one party press the **SPLIT** softkey and the two calls will go onto hold on separate intercom buttons

Hang up on or both and/or rejoin one of the callers by using the **INTERCOM** buttons

8. PARK A CALL

Press **TRANSFER** softkey or **TRANSFER** button if one is present

Press ***70**

Press **DIAL or SEND**

Note the assigned Park-Extension (1-9) announced by the system

The caller will hear the ON-HOLD recording

(see Special Speed-dial buttons below)

9. RETRIEVE A PREVIOUSLY PARKED CALL. (you must know the assigned Park-Extension)

Press ***71** followed by the number of the Park-Extension selected by the system when the call was parked.

(see Special Speed-dial buttons below)

10. PROGRAM AN AVAILABLE BUTTON AS A DSS OR SPEED-DIAL
From all Polycom phones with available buttons
Note: keys are automatically selected in order from left to right and top to bottom on phone and then on "sidecars"
Press **MENU**   Select **FEATURES**   Select **CONTACT DIRECTORY**
Select **MORE**   Select **ADD**   Enter text for the label in the First Name field from the phone keypad
Enter the extension # (for a DSS) or a 10 digit phone number (for a speed-dial) in the Contact field.
Scroll down (using the up and down arrow keys on the phone) to the Watch Buddy field and, using the arrow keys on the phone,
(**>** and **<)** select **DISABLED** for a speed-dial or **ENABLED** for a DSS.
Select **SAVE**
Press **MENU** to exit or **MORE** to program another button and follow the above steps again

11. DIRECTED CALL PICKUP

When another extension is ringing

Press ***** and **8** followed by the # of the extension which is ringing and you will answer that extension

12. TRANSFER A CALL TO AN OUTSIDE NUMBER

While connected to caller press **TRANSFER** and dial number you want to transfer caller to.

When answered, press **TRANSFER** and hang up – caller will be transferred.

13. CALL ANOTHER STATION USING THAT STATION'S SPEAKER WITH HANDS FREE ANSWER

Press ***** and **1** followed by the # of the extension and then press **DIAL or SEND**. You will be connected to that station

When you talk, you will be heard through the other station's speaker.

Someone at that other station can talk to you using that station's microphone.

14. USEFUL SPEED-DIAL BUTTONS - On some phones we have programmed special speed-dial buttons to facilitate easy access to some frequently used features such as:

CALL PARK – When you want to park the call you are on, first press **TRANSFER** and then hit the **CALL PARK** speed-dial button. The system will then place the call in a park-orbit and will announce to you the number of that park-orbit. You can then hang up and the call will remain on park. The parked call will recall to the phone where it was placed on park after a period of time which is initially set at 240 seconds

PICKUP PARK 1 (or 2) When you want to pick up a call previously placed in either park-orbit 1 or park-orbit 2, press the appropriate button. (either *Pickup Park 1* or *Pickup park 2*)

(see sections above on Parking a call and Picking up a previously parked call)

15. SYSTEM NOTES

1. Initial voicemail passwords are set to match the associated extension number. Initial passwords MUST be changed by the user to a secure password of his or her choosing.

2. Conference Bridge access = extension # ____ or select ___ from main greeting

3. Conference bridge password = ____

4. Main greeting - dial extension # ____

5. When dialing while on "speaker" you can dial the number and then hit **#** to send the call

6. 7 digit (where allowed) 10 digit and 11 digit dialing is permissible

7. Paging Access (if available) – press ____ and then press **#**. Wait to hear a ring and then a beep in the earpiece – then speak over the paging system

8. Emergency Voicemail Box (if used) is ____ and the password is ___