

MAXCS 7.5 Polycom® VVX Phone User Guide

This guide shows the basics of using Polycom VVX model phones with MAXCS Release 7.5.

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.

Views

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



Softkeys

Several softkeys appear throughout the views:



Calls the number



Opens information about the entry



Edits details of the entry



Deletes the entry

Operational Notes

- Note that the following feature codes do not work on Polycom phones: #12, #26, #27, #44, #45, #46, #81, #82
- Forwarding calls is not supported.

Basic Features

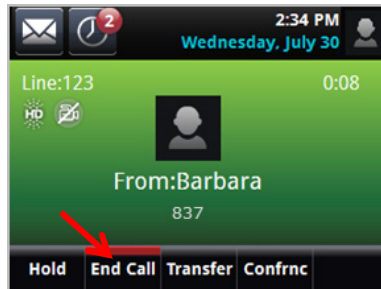
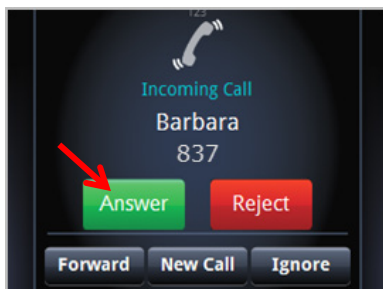
The following features are available for all Polycom VVX phones.

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, just press the physical phone button instead of a softkey.

Answer Incoming Calls

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**.



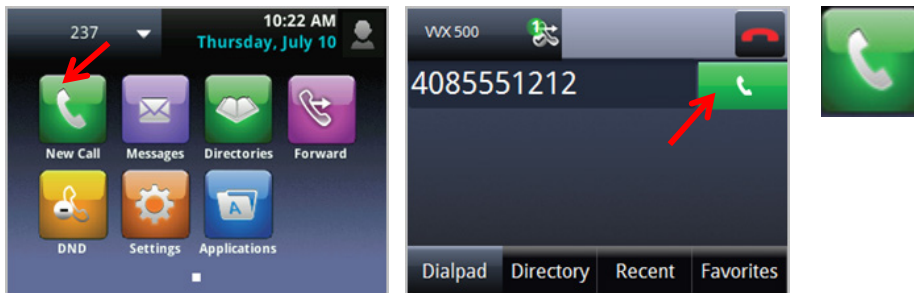
Note: You cannot tap the **Forward** softkey to forward an incoming call.

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.

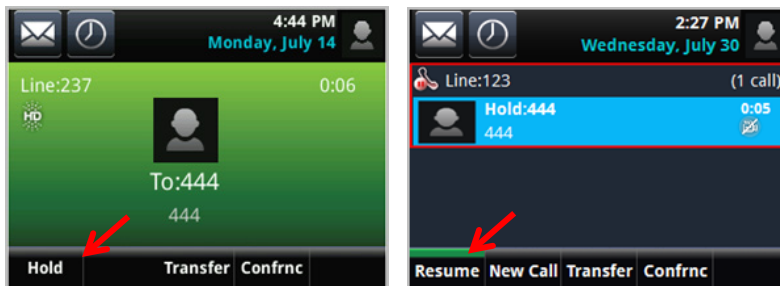
To place a call from an entry in your Recent list,

- 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

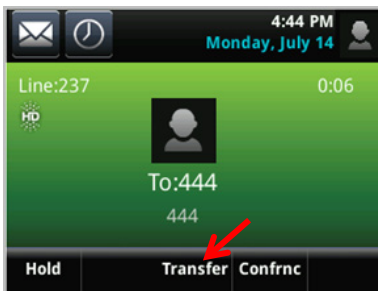
Note: When transferring calls to or from a Polycom phone, in some scenarios the Caller ID will show as your ID instead of that of the original call.

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.

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

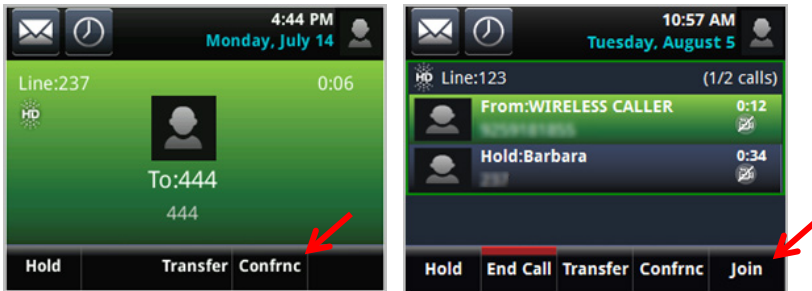
1. While on a call, tap **Transfer**. The call is placed on hold.
2. Tap **Blind**. (On some VVX models, you must tap **More** and then tap **Blind**.)
3. Enter the extension number or choose the number from the Directory or Favorites list.
4. Hang up; the call will automatically transfer. You do not 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.

Conferencing Calls

- 1 Call the first conference member.
- 2 Tap **Conference**.
- 3 Call the next participant and tap **Conference**.



- 4 To add additional participants (up to 6 participants per conference call) tap **Hold**, dial the number, and tap **Join**. (Do not use the **Conference** key after the third participant has joined.)

Note: 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.

Directory

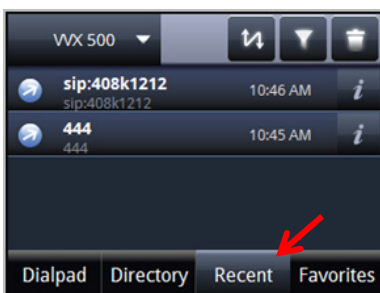
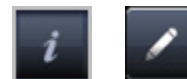
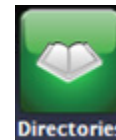
Tap **Directories** to open the screen.

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.



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,

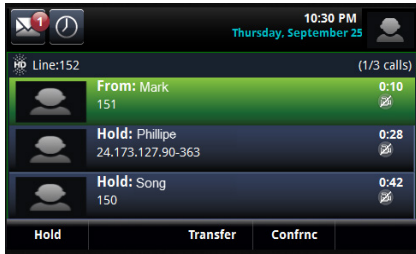
- 1 In *Home* view, tap **Directories**.
- 2 Tap **Recent**.
- 3 Tap the *Information* icon beside the entry that you want to save.
- 4 Tap **Add to Favorites**.
- 5 Tap again to accept the assigned softkey slot.



Multiple Call Handling

(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**.

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.

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.

Note: The #17 feature requires a SIP-Tie trunk to communicate with the server.

Working with MAXCS Clients

You can perform many actions via your phone or via MaxAgent (or another client). Whichever device you initially use, you must continue using that device until all calls drop or only one call is connected.

For example, if you put a call on hold via MaxAgent, to resume the call use MaxAgent. Likewise, if you answer multiple calls via your phone, to release calls (or perform other actions), use your phone.

Voicemail

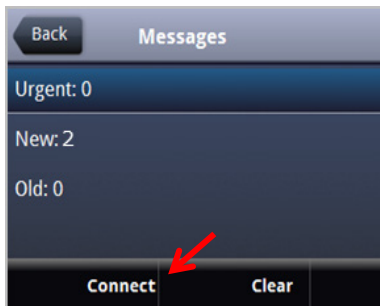
To hear voicemail messages,

- 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.

(The Old message count on Polycom phones is equivalent to MAXCS Total – MAXCS New.)

- 2 Tap **Connect**.
- 3 Enter your password and respond to the prompts in the voicemail system.

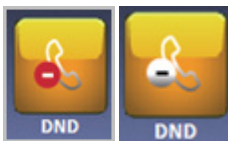


Advanced Features

In order to use the following features, your administrator must have already assigned a *Polycom Advanced Features* license to your extension.

DND Synchronization (Advanced 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.

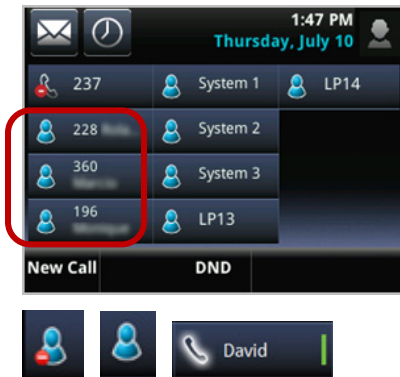


When you tap **DND**, the line icon in *Home* view shows a red circle.

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

Line Monitoring / BLF (Advanced License required)

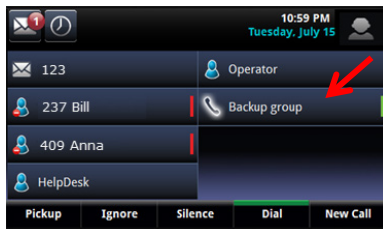
If your administrator configured your extension to monitor other extensions, you will see those monitored extensions as softkeys in *Lines* view.



- 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.

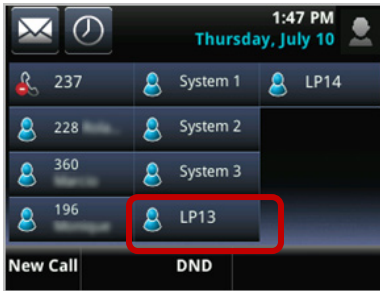
When a monitored extension is ringing, you can take these actions (if the administrator enabled the *Splash Ring* feature for you):

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

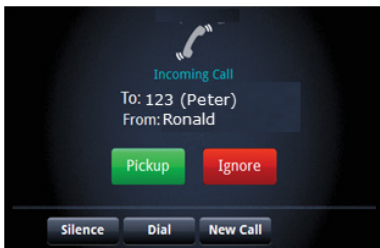
Line Park (Advanced License required)

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.



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.

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

Transfer a Line-parked Call

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

See the discussion on page 4 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**.

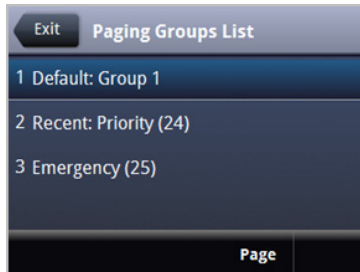
To perform a *Blind* transfer:

- 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 License required)

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 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.

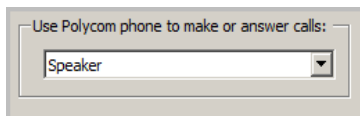
- 1 In Lines view, tap **Paging**. (This softkey is enabled if you Administrator added you to any Polycom paging groups.)
- 2 Tap the paging group that you want to page.
- 3 Tap **Page**. Wait a few seconds, and then begin speaking.
- 4 When you finish speaking, tap **End Page**.

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

Handling Calls via Clients (Advanced License required)

You can configure MaxAgent, MaxCommunicator, AltiConsole, and MaxOutlook to answer or place calls via your Polycom phone.

In MaxAgent and MaxCommunicator, the setting is under **Configuration > Extension: Use Polycom phone to make or answer calls**. In AltiConsole, the setting is under **Setup > General**. In MaxOutlook, the setting is **Configuration > General**.



There are three options for this feature:

- **Disabled** – You must answer and place calls manually.
- **Speaker** – When you click an incoming call from the MAXCS client, the call will be answered by the phone's speaker; outgoing MAXCS client calls will be dialed and directed to the phones' speaker.
- **Headset** – When you click an incoming call from the MAXCS client, the call will be answered by the phone headset; outgoing MAXCS client calls will be dialed and directed to the phones' headset.

This answering feature is enabled only when your phone is on-hook.

Auto-Answer via Clients (Advanced License required)

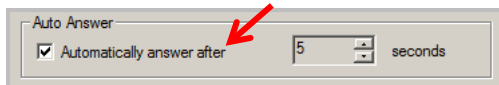
You can configure MaxAgent, MaxCommunicator, AltiConsole, and MaxOutlook to automatically answer calls.

This Auto-Answer feature is available only when the **Use Polycom phone to make or answer calls** option is set to **Speaker** or **Headset**.

In AltiConsole, the setting is under **Setup > General**.

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

Check the **Automatically answer after xx seconds** checkbox, and set the number of seconds before calls are picked up. Note that there may be a few seconds (3-4) of delay answering calls with this feature.



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