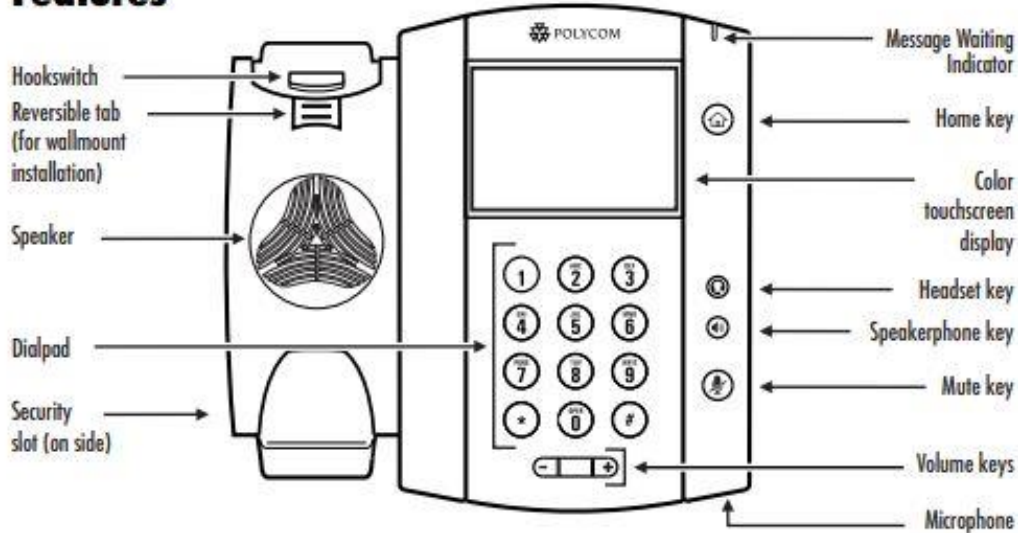# Function Guide for Users of Polycom Model 501 (Touchscreen) Phone at SEBTS

Contents:

Features

1. **Setting up your phone:**
   a. Change your **Ring Type**:
      - Home Key (Icons view) – Settings – Basic – Ring Type – Select a Line – Select a Ring Type
        - [Press the Home key or touch the back arrow to exit]
   b. Select your default **Transfer Type** (Consultative or Blind), depending on whether you normally want to talk to the transferred-to party or not
      - Use the Home button to go to the Home Icons view
      - Touch the Settings icon
      - Touch Basic – Preferences – scroll down (swipe up) to Default Transfer Type – Select your choice
        - [Your selected preference will be the default when transferring a call, but the other type will show at the top of the screen so you can select it if desired for a particular transfer].

2. **Setting up your Voicemail:**
   a. Recording your **name**:
      - From either home screen (Icons or Lines View) touch the Messages icon (envelope)
      - Touch Message Center
      - Enter your password (the first time, enter phone extension and create a password)
      - Press 0 (Mailbox Options) – Press 3 (Record your name) – follow prompts

   b. Recording your **greetings**:
      - Touch the Messages icon
      - Enter your password at the prompt
      - Press 0 (Mailbox Options) and choose which greetings to record:
        - Press 1 (Unavailable message)
        - Press 2 (Busy message)
        - Press 4 (Temporary greeting)

   c. Change your **password**:
      - From Mailbox Options (as above) – Press 5 (Change password)

3. **Personalizing your phone with the Star2Star Portal:**

The Star2Star Portal has several settings, and you may find some are useful to you:

URL: https://portal.star2star.com/

If you have not logged in and set your password, click the "Forgot Password?" link and set one up.

a. **Configuration tab**
   o **Speed Dials** – set up to 9 numbers you can dial with your line buttons or Favorites Directory
   o **Phone Options** – several customizations for your phone
   o **User Info** – your displayed name and number (you can add additional numbers like your cell and home phone to use with Find-Me / Follow-Me)
   o **Find-Me / Follow-Me** – Explains the options and provides settings for ringing your extension and the other numbers you defined in User Info
   o **Voicemail** – some customizations (please note the following)
   - You can have voicemails sent to your email or cell phone
   - You can make listening to your Voicemails faster by turning off Caller ID and Date/Time information. You will still be able to hear these if you press '33' while listening to a message.
   - CallerID Blocking
   - Print Company Directory – a nice listing of the SEBTS directory (printing is an option)

b. **Reports tab**
   o Select your extension in the pull-down to see calling history

4. **Phone operation:**

   a. **Home key** (house icon) toggles between Lines View and Home Icon view

      NOTE: You can use the Home key at any time to return to the home screen

   b. **Do Not Disturb**
      o Touch DND icon (or DND soft key from the Lines View) [Toggles DND on and off]

      [Notice that your displayed extensions will have a small red marker when in DND and a green marker when it is off]

   c. **View recent calls** (Missed, Received, Placed)

      o From the Home icon view: Touch Directories – Recent

        OR - From the Lines view: Touch the clock icon near the top left

      o To select the recent call *type,* touch the Filter icon (funnel) at the top of the screen

        • Select All Calls or Missed, Received, or Placed Calls

        • Select All Lines or select the one you want

              [NOTE: Your selections will remain until modified]

   d. **Directory search**

      o Touch Directories from Home icons, or touch the Directory soft key from Lines View

      o To search for a name, touch the Search soft key (top of screen)

      o Enter a few letters from either the First Name or Last Name you want to find (you do not have to enter both names). [Also, Search is not case-sensitive].

        • To enter a letter, multi-press the number corresponding to its letter on the keypad (Ex: for the letter V, press the 8 key three times)

        • If you need to erase a letter, touch the back-erase icon on the right side of the entry field as needed

        • Touch the Search soft key to see the search results

        • Touch the name you want, and from the window that appears touch the number to start the call from speaker OR pick up the handset to make the call without using the speaker

e. **Transfer a call using the keypad**

   o   After answering the incoming call you want to transfer – Press the Transfer soft key

      •   (Option) If you want to change the Transfer Type from the default, touch the soft key at the top of screen for the alternate type (Blind or Consultative) [See explanation in section 1.b.]

   o   Use the keypad to dial the transfer-to extension

         NOTE: If you want to transfer the caller directly to the transfer-to party's <u>voicemail</u>, simply precede the extension with a '6' (i.e., 6xxxx)

      •   If the selected Transfer Type is Blind, the call is immediately transferred

      •   If the selected Transfer Type is Consultative, you will be connected to the transferred-to party to discuss the call

            ▪   If the party wants to accept, press End Call to connect the parties (you will drop off the call)

            ▪   If the party refuses or doesn't answer

                  –   Touch Cancel to return to the calling party

                  –   If the party's voicemail begins, you can connect the calling party to the voicemail by touching Transfer

f. **Transfer a call using the Directory**

   o   Touch Transfer – Directory

   o   Search for the contact (see Directory Search above)

   o   When found, touch the contact, touch the number in the window that appears, then touch **Transfer** to connect the caller to the contact OR touch **Cancel** to cancel the transfer and return to the caller

g. **Forward your phone extension**

- o Touch the Forward soft key

- o Select the line you want to forward

- o Touch Always, No Answer or Busy

- o Enter the extension number where you want to forward your phone

- o Touch Enable (you will see a different icon on the Line View for that line)

h. **Disable forwarding of your phone extension**

- o Do the first 3 steps above, then touch Disable

5. **Notes regarding handling your Voicemail Messages:**

   a. **Retrieving Caller ID and Date/Time from a message**

   - o If you set Caller ID and Date/Time information to OFF in the Star2Star Portal, you can get this information when listening to a message by pressing '33' on the keypad

   b. **Forwarding a message to another extension**

   - o While listening to the message follow the voicemail prompts this way:

     - Press 8 to transfer

     - Press 1 to enter an extension (or 2 to use the Voicemail Directory) - [See * Note below]

     - Key in the extension followed by # (xxxx#)

     - Press # to continue (or 1 to enter an additional extension)

     - Press 2 to send the message (or 1 if you want to prepend a message before it)

   * **NOTE:** Using the Voicemail Directory

   When you select the prompt for using the Directory in Voicemail, please note the following:

   - Using the Voicemail Directory is different from using the phone Directory in that you only enter one keypad touch per letter (as opposed to the multi-touch method).

6. **References** (access with links in electronic version of this document)**:**

   a. **User Guides (touchscreen model)**

      o VVX **501 Quick User Guide**

   b. **Detailed guide to all functions**

      o Polycom **VVX Business Media Phones**

         [NOTE: This guide provides detailed information, but covers all of the VVX models. It often distinguishes differences based on model, so read carefully. You may find that using the find function (Ctrl-f) is helpful for finding information on specific features].