Reference Guide

IP Phone/Calling Features • Voice Mail • Personal Assistant Toolbar

Dialing

To dial phone number or extension

Lift your handset and dial the phone number, (OR, with handset on-hook, dial number and press **Dial** or press **Speakerphone** button (◀))). For:

- **Local call** – dial the 7-digit local number
- **Long distance** – dial the 10-digit phone number (area code + local number)
- **International** – dial 011 + country code + city code + number
- **Internal extension** – dial the 4-digit extension

To Speed Dial – (requires set up)

1) Press 1-digit code, or # plus 2-digit code assigned to the number you want to dial.
2) Then lift handset, press **Speakerphone** button or press **Dial**.

Note: If account codes are assigned to your phone, you may be prompted to enter a code to complete the call.

Phone Guide

Polycom SoundPoint 550 model phone

Main Keys

 Hold   Headset

 Mute   Speakerphone
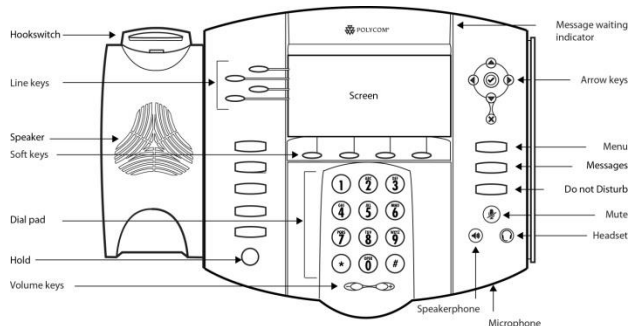
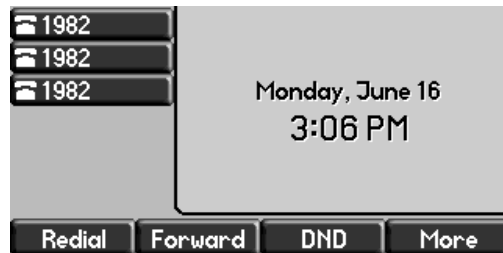*NOTE: Be sure to use a surge protector with your phone.*

Your Phone Calling Features

Phone Views

Your phone has three main Views: Calls, Active Call, and Lines View (the default).

Lines View

Lines View displays your phone Lines, monitored Lines (if enabled), Favorites, and soft keys.

If your phone is idle, you can:

- Press a Line key to access the dialer.
- Press a monitored Line or Favorite to call that number. *A monitored line (BLF Key) will show a flashing green bar if it is ringing and a solid red bar if it is on a call.*

Calls View

You can access Calls View if your phone has multiple calls in progress, or you have one held call.

Calls View displays a list of all your calls.
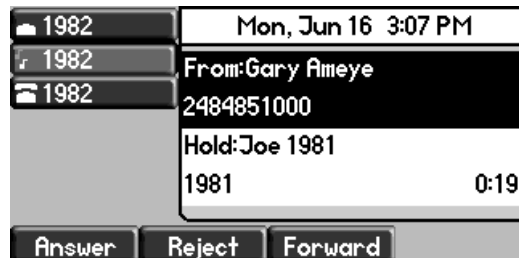
Call color indicates status:

- **Dark gray:** Active call
- **Light gray:** Incoming call
- **Light gray:** Held call

Use the up and down arrow keys to select a call (highlight it). The soft keys control the highlighted call

Entering Data

Use the dialpad keys to enter information.

- To backspace, press ⟨⟨
- To type with the dialpad keys, press a key repeatedly to view the character options and stop to select.
- To type other characters, press **Encoding** or **1/A/a**. When using the dialpad keys, use the 1, **✱**, 0, and **#** keys.

About Calls

- Only one call can be active at a time.
- You can use the handset, speakerphone, or headset for calls.
- During a call, you can change modes by picking up the handset, or by pressing 🔊 or 🎧.

Placing Calls

1) Pick up the handset, or press 🔊 or 🎧.
2) Enter the phone number, and press **Dial**.

- **From Lines View**: Press the phone line key, enter the phone number, and press **Dial** .

> **Timesaver: Placing Calls Quickly**
>
> Select a recent call, monitored line (if enabled), or favorite, or select a contact's phone number in the contact directory.

Redial

- To redial the last call placed, press **Redial** button or softkey.

Answer Calls

- Press 🔊 or **Answer** and pick up the handset, or press 🎧.
- To answer a new call while on an active call, press **Answer**. The current call will be held.

Hold Calls

- From Calls View, press Hold or ⌾. Remember to highlight the call first.
- To resume a held call, press **Resume** or ⌾ again.

Transfer Calls

From Lines or Calls View

1) Press **Trnsfer,** dial the other party and press **Send**. Active call is held.
2) When you hear the ring back sound, or after you talk with the other party, press **Trnsfer** again.

NOTE: If you hang up after hearing ring back sound, the call will be transferred blindly/immediately without speaking to other party.

End Calls

- **To end an active call**, replace the handset, press 🔊, or press 🎧. Or, press **End Call**.
- **To end a held call**, highlight the held call. Press **Resume**, and press **End Call**.

Transfer Call direct to Voice Mail

To transfer directly to voicemail:

1) During a live call, press **More** then **VMxfr**.
2) Enter the extension number and press **Enter**.

Park and Unpark Calls (If Enabled)

To park a live call,

1) Press **More,** then press **Park**.
2) Listen to the announcement which identifies the extension the call is parked to.
3) Notify the intended recipient(s) that a call is parked at specified extension.

To unpark a call

1) Recipient presses **More**, then **Unpark**.
2) Recipient dials the extension to which call was parked, and then presses **Enter**.

Forward Calls

NOTE: Please see Quick Dial and Personal Assistant Toolbar sections of this guide for additional Call Forwarding options and methods.

To enable call forwarding (phone based):

1) Press **Forward**, then **Select** (Always is highlighted)
2) Type a forwarding number, then press **Enable**.

To disable phone-based call forwarding:

1) Press **Forward**.
2) Select the forwarding type to disable, and press **Disable**.

Return Calls

To select from list of recent missed incoming calls

1) Press **Menu** button and press **Select** softkey (with Features option highlighted),
2) Press down arrow three times to highlight **Call Lists** and then press **Select** softkey.
3) Press **Select** softkey (Missed Calls is highlighted).
4) Press down/up arrows to navigate to desired call.
5) Press **Dial** to place call.

Another way to access Call Return:

1) Dial ✱69 and the system will announce the last incoming number, then **dial 1** to place call to that number.

Conference Calls

To conduct conference calls:

1) Call the first party.
2) From Lines or Active Call View, press **More**, then **Confrnc**.
3) Dial the other party and press **Send**. Wait for other party to answer and then press **Confrnc**.

From Lines or Calls View, you can:

- Press **Hold** to hold the conference.
- Press **End Call** to end the conference.
- Press **Join** to join together two held calls.

🕐	Timesaver: Placing Conference Calls
	If you have an active and a held call, press **More**, then **Join** to set up a conference.

Paging and Intercom Features

Intercom

To intercom an extension (connect directly to other party's speakerphone)

1) Press **More**, then **Intercom** from Lines View.
2) Dial the number to which you wish to intercom, then press **Enter**.

NOTE: If you are receiving an intercom call, the phone beeps, then the caller automatically connects to your speakerphone.

Zone Paging (If Enabled)

Zone Paging enables you to intercom to all extensions in a pre-defined group at once.

1) Press **More**, **More**, **Paging**
2) Select the group you want to page, then press **Page**.
3) You can then begin speaking.

NOTE: If you are receiving a paging call, the phone beeps, then caller automatically connects to your speakerphone.

Viewing Recent Calls

To view your **Recent Calls** list

1) Press **Menu** button and press **Select** softkey (with Features option highlighted),
2) Press down arrow three times to highlight **Call Lists** and then press **Select** softkey.
3) Press down/up arrows to navigate to Missed Calls, Received Callls or Placed Calls.
4) Press down/up arrows to navigate to desired call.

While in Lines View:
1) Press down navigation button for missed calls
2) Press left navigation button for received calls
3) Press right navigation button for placed calls

Select the desired call record and press **Dial.**

Contacts

Contact Directory

To view your directory

1) Press **Menu** button, followed by **Select** (Features is highlighted).
2) Press down arrow twice to highlight **Contact Directory**.
3) Press **Select.**

To add a contact

1) Press **More**, then press **Add**.
2) Type the contact's information, and press **Save**. The phone number should be added to the **Contact** field.

To make a contact a Favorite

1) Press and hold the desired line key.
2) Enter the contact's information and press **Save**. The phone number should be added to the **Contact** field.

To update contact information

1) Navigate to your Contact Directory and select the contact.
2) Press **Edit**, update the contact's information, and press **Save**.

To delete a contact

1) Navigate to your Contact Directory and select the contact.
2) Press **More**, press **Delete**, and press **Yes** to confirm.

To search for a contact

1) Navigate to your Contact Directory and press **More**, then press **Search**.
2) Enter search criteria, and press **Search**.

To dial a contact from your directory

1) Navigate to your Contact Directory and select the contact.
2) Press **Dial**.

Notes

- **Monitored Lines (BLF Keys)** are part of an optional add-on, and are managed by your phone system administrator. Up to 2 can be configured.
- **Line Appearance Keys** (2 standard) can independently handle live calls. With the add-on up to 1 Line Appearance Keys can be configured. These are also managed by your phone system administrator.

ACD Call Queues (If Enabled)

To log into a Call Queue

1) Press **More, More** and then press **ASignIn**. When you are signed into a call queue, a green icon will be displayed next to your line*.*

To log out of a Call Queue

1) Press **More, More** and then press **ASignOut**. After logging out, a gray icon will be displayed next to your line.

To change your agent state to unavailable while logged in:

1) Press **More, More** and then **Unavailable**.
2) Press the status that best describes the reason for not being available (e.g., out to lunch, in a meeting, etc.).

Additional Phone Features

Muting the Microphone

- During a call, press 🎤 (Mute button) so other parties can't hear you.
- To disable Mute, press 🎤 again.

Do Not Disturb

- To disable ringing, press **DND.** The LCD display will show a DND icon and any incoming calls will be directed to voicemail.
- Press **DND** again to re-enable ringing.

Change Volume

- **To change call volume**, press ⊖⬛⊕ during a call.
- **To change the ringer volume**, press ⊖⬛⊕ when the phone is idle or ringing.

Update Ringtone

To change the incoming call ringtone

1) Press **Menu** button, then **Settings**.
2) Press **Basic** > then **Ring Type**.
3) Press **Default.**
4) Navigate using up/down arrows to and then **Select** the desired ringtone.
5) Press **Play** to hear ringtone (the last played ringtone will be saved).

Access Voice Messages

1) Press the **Messages** button.
2) Follow prompts to play messages, record greetings, etc. *(See Voice Messaging section for more options.).*

Account Codes

- If account codes are enabled on your phone, you will be prompted to enter a non-validated code after dialing the desired number.

> **IMPORTANT NOTE about 911:** *Because VOIP (Voice over Internet Protocol) service works differently than traditional phone service, VOIP E911 service may also work differently. To understand limitations and to be prepared should you need to make a 911 call from your IP phone, please read the TelNet E911 Emergency Service Advisory Notification at www.telnetww.com/TelNet911Advisory.pdf*

Quick Dial Calling Features

Call Forwarding

Forward all incoming calls to another number or voice mail, forward calls only when your line is busy, or when calls go unanswered. As part of your business continuity plan, have Call Forwarding Not Reachable feature set to automatically forward all calls if something prevents calls from completing, (e.g. power failure or loss of Internet connectivity).

To activate Call Forwarding

1) Lift handset. Press the ✱ **code** (noted below).
2) Enter phone number to which calls will be forwarded. (Or forward to Voicemail)
3) Press # and replace handset. The service is on.

To deactivate Call Forwarding

1) Lift handset. Press the ✱ or **# code** (below).
2) Replace handset. The service is off.

Call Forwarding	Activate	Deactivate
All Calls	✱72	✱73
All Calls to Voicemail	✱21	#21
*When Busy	✱90	✱91
*Busy to Voicemail	✱40	#40
*When No Answer to Voicemail	✱41	#41
Not Reachable (for business continuity plan – requires set up)	✱94	✱95

*Note: Call forwarding options marked with * require call waiting to be disabled to function properly.*

Call Waiting

Be notified of other calls coming in while you are on the line.

To activate Call Waiting for All Calls

1) Lift handset. Press ✱43.
2) The Call Waiting service is turned on for all calls.

To deactivate Call Waiting for All Calls

1) Lift handset. Press #43.
2) The Call Waiting service is turned off for all calls.

To cancel Call Waiting for a Single Call

1) Lift handset. Press ✱70.
2) The Call Waiting service is turned off so that you can make an uninterrupted phone call. The Call Waiting service will be back on after the next outgoing phone call.

Directed Call Pickup

Intercept or pick up a call coming in on another phone in your call pickup group.

1) Press **More**, then **Pickup**.
2) Dial the extension of the phone that is ringing and then press **Enter**.

OR, you may
1) Lift handset. Press **✱**97.
2) Enter the extension of the phone that is ringing and then press the **#** key. The call will be redirected to your extension and you will be connected to the call.

Speed Dial 8 (1-digit codes)

Set up and update 1-digit speed dial codes for frequently dialed numbers; directory is active on both your phone and Personal Assistant Toolbar for fast, easy dialing.

To set up/update Speed Dial 8 (1-digit codes)

From your phone

1) Dial **✱74** and listen for tone.
2) Enter the 1-digit code plus the 10-digit phone number you would like assigned followed by #. *(Recorded message confirms code was programmed.)*

From your Personal Assistant Toolbar

1) Click **Portal Auto-Login** button on toolbar.
2) Select Outgoing Calls, then Speed Dial 8.
3) Enter the 10-digit phone number next to the code you would like assigned. (Optional – add description.)
4) Click **Apply**.

To place call using Speed Dial 8

From your phone

1) Press the 1-digit **speed dial code**, then press **Dial** or **Send**.

From Personal Assistant Toolbar

1) Click on Speed Dial Directory icon.
2) Click on the number you wish to dial.

Speed Dial 100 (2-digit codes)

Set up and update 2-digit speed dial codes for frequently dialed numbers; active on both your phone and Personal Assistant Toolbar for fast, easy dialing.

To set up/update Speed Dial 100 (2-digit codes)

From your phone

1) Dial **✱75,** press **#** and listen for tone.
2) Enter the 2-digit code plus the 10-digit phone number you would like assigned followed by **#**. *(Recorded message confirms code was programmed.)*

From Personal Assistant Toolbar

1) Click Portal Auto-Login button on toolbar.
2) Select Outgoing Calls, then Speed Dial 100.
3) Click Add, then select 2-digit code from pull-down list.
4) Enter Description (optional) and 10-digit phone number you would like assigned.
5) Click OK.

To place call using Speed Dial 100

From phone

1) Press **#** plus the 2-digit speed dial code, then press **Dial**.

Quick Dial Guide

	On	Off
Call Forward		
All Calls	Forward or **✱72**	Forward or **✱73**
All Calls to Voicemail	**✱21**	#21
When Busy	**✱90**	**✱91**
Busy to Voicemail	**✱40**	#40
When No Answer to Voicemail	**✱41**	#41
Not Reachable (for business continuity plan – requires set up)	**✱94**	**✱95**
Check Not Reachable Status	**✱63✱**	
Call Waiting	**✱43**	#43
Cancel for single call		**✱70**
Call Return (last inbound number)	**✱69**	
Directed Call Pickup (intercept)	**✱97**	
Redial (last outbound number)	**✱66**	or Redial
Access Voicemail	**✱86**	or MESSAGE
Transfer Call	**Transfer**	
Call Hold	**Hold**	Resume
Do Not Disturb	DND or **✱78**	DND or **✱79**
Three-way Call	**Confrnc**	(repeat to add)
N-way Call (more than 3)	**Confrnc**	(repeat to add)
Speakerphone	**Speaker**	(again for off)
Mute	**Mute**	(again for off)
Music On Hold Deactivation (per-call deactivation)		**✱60**
Clear Message Waiting Indicator	**✱99**	
Change Number of Rings before voicemail picks up	**✱610**	

Accessing Voicemail and Your Voice Portal

You can access your Voice Mail and personal Voice Portal using your own phone:

- Press **Messages**.
- OR - Dial ✱86 from your phone.

Your administrator provides you with the phone number/ extension for the group Voice Portal (referred to as the Voice Portal general access number/extension.)

Initial Voicemail set up

1) First time logging in, press **Messages,** OR ✱86 from your phone, and then:
2) Enter a new passcode at the prompt, followed by **#.**
3) Re-enter your passcode at the prompt followed by **#.**
4) Record your name at the prompt and press **#**. Your Voice Portal is setup and ready for use.
5) Your voice mail password must be 6 digits in length and cannot be your phone number. Do not use weak passwords (e.g., not sequential or repeating digits).

To access your Voicemail and Voice Portal

From your own phone:

1) First time logging in, press **Messages,** OR dial ✱**86**.
2) Enter your passcode followed by #. (Skip step if auto login is enabled.)
3) Follow prompts of the **Voice Messaging Main Menu**.

From another phone within your group:

1) Dial your phone number or extension.
2) Press ✱ during your greeting to reach the login prompt.
3) Enter your passcode followed by **#** to reach **Voice Messaging Main Menu**.
4) At the Voice Messaging menu, make selection, (or press ✱ to reach the **Voice Portal Main Menu.**)

From a phone outside of your group:

1) Dial the Voice Portal general access phone number/extension
2) Enter your mailbox number (typically your phone number).
3) Enter your passcode followed by **#**.
4) Follow prompts of the **Voice Portal Main Menu**.

Voice Messaging Main Menu

1	**Listen to Messages**
2	**Busy Greeting Menu**
3	**No Answer Greeting Menu**
5	**Compose Message Menu**
7	**Delete All Messages**
✱	**Voice Portal main menu (see below)**
#	**Repeat menu**

"Play Message" options

While listening to message		Between messages	
1	Skip Back	**#**	Save
2	Pause/Resume	**7**	Delete
3	Skip Forward	**2**	Repeat
4	Jump to Beginning	**5**	Envelope Info
6	Jump to End	**6**	Play Next Msg
Anytime		**8**	Callback Caller
✱	Return to prev menu	**9**	Add'l Options

1	Reply to message
2	Forward
✱	Return to prev menu
#	Repeat

Voice Portal Main Menu

1	**Access Voice Mailbox**
2	**Change Profile**
3	**Record Personalized Name**
5	**Change Passcode**
6	**Exit**
#	**Repeat menu**

Note: Message waiting indicator light may stay on if messages are not deleted. To clear message waiting indicator, dial ✱99.

Personal Assistant Toolbar

The Personal Assistant Toolbar allows you to control much of your OfficeEdge Complete phone and call management functionality right from your PC through Microsoft Outlook or Microsoft Internet Explorer. You can manage your incoming and outgoing messages, maintain up-to-date connection information, and configure controls on your calls and voice mail.

First Time Login

Logging in to the Personal Assistant Toolbar connects you to the servers that manage your phone services. This is so you can receive, initiate, and control calls directly from your computer.

When you log in for the first time, you will need to configure your connection settings.

1) Click **Login** icon on the toolbar to view Options.

2) Click **Account**.

3) To configure your account settings, enter the **username** and **initial password** provided by your administrator for your Personal Assistant Toolbar account in the provided fields.

4) First time you login, you'll be prompted to enter a new password. Enter the **initial password**, then your **new password** (in two fields) and click **OK**:
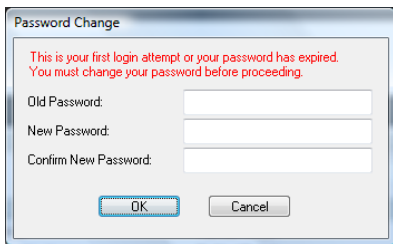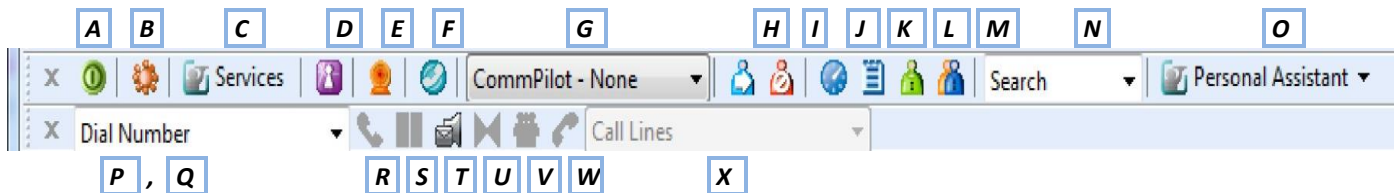
5) Check the *Save Username* and *Save Password* options if you want to avoid being prompted for this information next time you log in. Your password is encrypted for greater security.

6) Click **Apply**, then click **OK**.
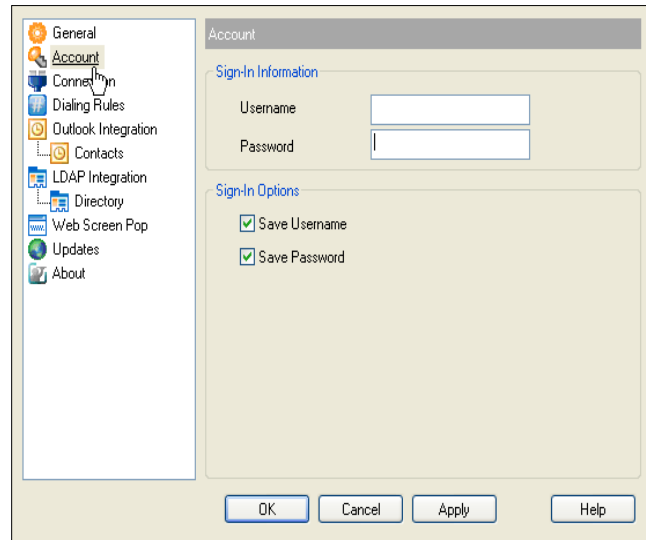
Login Anytime

- Simply click **Login** icon on the toolbar for anytime access.

Personal Assistant Toolbar

Personal Assistant Toolbar Key

A	Login	G	CommPilot Profile	M	Group Directory	S	Hold
B	Configure Options	H	Call Forward Always	N	Search	T	Transfer to Voicemail
C	Configure Services	I	Do Not Disturb	O	Assistant - Web links	U	Blind Transfer
D	Portal Auto-Login	J	Speed Dial Directory	P	Dial Contact - MS Outlook	V	Conference Call
E	Remote Office	K	Call History	Q	Dial Number	W	End Call
F	Simultaneous Ring	L	Personal Directory	R	Answer	X	Calling Line Status

---

Personal Assistant Toolbar Icon Key

Login - log in and out of Assistant. Icon color indicates status. Grey: Not logged in. Green: Logged in. Red: Login attempt failed. A disabled button: Assistant attempting to log in.

Configure Options - configure your account, connection settings, and dialing rules through this dialog.

Configure Services - configure call management services provided by Personal Assistant. Icon is highlighted when in use.

Portal Auto-Login - log in to your Personal Assistant Portal from Microsoft Internet Explorer. Manage your outbound/inbound call features, messaging, conferencing, call control features, speed dial directories and more. (Not available on MS Outlook.)

Remote Office - when activated, this service allows you to use an alternate phone, such as a mobile, home, or hotel phone, as your main business phone.

Simultaneous Ring - set up a list of up to ten additional phone numbers that ring each time you receive a call.
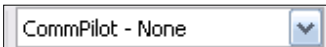
CommPilot Profile - sets the current CommPilot Express profile, which determines the way incoming calls are handled. (Configure your profile settings in the *Services* dialog.)

Call Forward Always - automatically forwards all incoming calls to a specified phone number.

Do Not Disturb - automatically forward all incoming calls to your Voice Messaging service, or play callers a busy tone if you do not have Voice Messaging configured.

Speed Dial Directory - dial phone numbers saved in your speed dial list by clicking them with your mouse.

**Call History** - lists most recent received, missed and dialed calls.

Personal Directory - dial phone numbers saved in your personal directory by clicking them.

**Group Directory -** dial phone numbers in your group directory by clicking them.

Search - searches in the group, personal, Outlook Express, and Lightweight Directory Access Protocol (LDAP) directories for the text you enter.
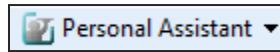
Personal Assistant - dropdown list of useful URL links (e.g., TelNet Digital Fax Portal and TelNet website for other resource materials). Select link to page in web browser.

Dial Contact - dials the business, home, or mobile number of a selected contact within Microsoft Outlook.
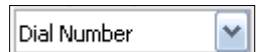
Dial Number - dials a specified number.

Answer - click to answer an incoming call.

Hold - puts current call on hold.

Transfer to Voicemail - transfers current or incoming call to your *Voice Messaging* service.

Blind Transfer - transfers current call to another phone number.

Conference Call - starts a conference; this button is only enabled when you are connected to two other parties at the same time.

End Call - ends current call.

Call Lines - lists phone numbers you are currently connected to.