Abacus Hosted PBX Solution
Polycom IP550/560 Phone Training

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Getting to know your Polycom IP 550/560

- **Soft Keys**
  - Shortcut to call logs
  - Menu navigation arrows
  - ✓ = select
  - X = backspace, delete

- **3 Line Buttons**

- **Programmable Speed Dial Buttons**

- **Hold Button**

- **Feature & Function Buttons**

- **Speakerphone Button**

- **Mute Button**

- **Headset Button**

- **AbacusGroup**
Throughout this training and in the user guides, we will refer to both Buttons and Soft Keys

🔹 **Buttons:**
  - Refers to the physical buttons on the phone. These vary depending on the phone model, but are labeled with the name of the function or feature they perform. They always perform the same function/feature.

🔹 **Soft Keys:**
  - Refers to the keys that appear below the LCD screen on your IP Phone. These are called “soft” because the function they perform changes depending on the state of the phone. You will notice different options appearing on the soft keys when you are on-hook versus on a call, as well as when you are using the soft keys to perform certain tasks.
Placing a Call

❖ Preferred Method
  - Enter number, with handset still in cradle, and
  - Pick up handset (you will be in handset mode),
    or
  - Press “Dial” soft key or button (you will be in speakerphone mode)

❖ Option 2:
  - Pick up handset and dial the number
    • NOTE: A digit error while dialing off-hook can be corrected by using the “X” key under the Navigation Arrow keys.
Placing a Call (continued)

- **Do Not** dial “9” to get an outside line
  - If you do dial “9” to get an outside line and then dial the phone number the system will consider this a “Misdial”

- **Do Not** dial “1” before making a local or long distance call
  - Like using a cell phone a “1” is not needed when dialing. If you do dial a “1”, don’t worry, the call will still go through

- **Always** dial the full 10 digit number when placing any call for North America including your own state

- **International Calling is optional as a company wide feature.**
  - Cost of International phone calls is posted on the Abacus Group website [www.abacusgroup.com](http://www.abacusgroup.com)
  - In order to place International calls your Administrator must request that this feature be enabled.
Answering a Call

- Pick up the Handset
- Press the Speaker button
- Press the Headset button
- Press the Line key for the line that is ringing (this will activate the speakerphone)
- Answer or Reject soft key
  - Answer soft key will answer the ringing line and put your phone in speakerphone mode
  - Reject soft key will stop the call from ringing at your phone and either send it to Voicemail or the next number in your call forwarding sequence, if you have one set up
Answering multiple Calls

- If you are on line 1 and another call comes in, it will ring on line 2
  - You will hear a beep and the LED next to line 2 will flash
- Press the Line 2 button to answer that call. *This will automatically put the party on line 1 on hold*
  - If you are done with the party on Line 1, you can press the “End Call” soft key before answering the second call
- Use the Line Buttons to toggle back and forth between the active calls you have. The LCD screen will update to show you who is on each line
- When you are done with a call, press the “End Call” soft key to disconnect that call.
Directories Polycom IP 550/560

- Press Directories button
  - Contact Directory
  - Call list

- Can also access call lists from navigation arrows
  - Bottom = Missed Calls
  - Left = Received Calls
  - Right = Placed Calls
  - Top = phone directory speed dial list. These are contacts you have added to your contact directory
Press the “Directories” button, then select “Call Lists” then select the list you want to review (Missed Calls, Received Calls, Placed Calls or Clear)

Scroll to find the caller you want to call

Press the “Dial” Soft Key, which will activate your speaker phone or pickup the handset

Note: The arrows on the silver disk act as short cuts to your Call Lists.

- Down Arrow: Missed Calls
- Left Arrow: Received Calls
- Right Arrow: Placed Calls
- Up Arrow: Speed Dial (these are the people you entered in your contact directory).
- You can auto dial a Contact by Pressing the Up Arrow and Dialing the single or multi digit number assigned to each Contact.
Adding a Contact to your Directory

- Press the **Directories** button, choose **Contact Directory**
- Press the **More** Soft Key, then the **Add** Soft Key
- Enter the Contact’s name and phone number
  - Enter the characters like you would when using text messaging on a cell phone without a QWERTY (full) keyboard, i.e. press the 7 key four times for the letter “S”, etc
- Users who have been entered in your contact directory will be accessible using the “up” arrow on the silver disk on your phone
  - To call a contact in your directory, highlight their name and press the **Dial** soft key
  - Or dial the “Index” number associated to the speed dial Contact number
The first time you call into your voicemail, you will be asked to:

1. Change Your Password (this is mandatory before you can continue)
   - The default Password for all new users is your extension #
   - Your new Password can be between 3 or 4 digits and not be your extension #

2. Record Your Name Announcement (this is required to be listed in the company dial by name directory)

3. Record Your Unavailable Greeting

4. Record Your Busy Greeting (this is not necessary but does no harm)

Note: Please do the FIRST THREE!

- If you don’t record your name announcement, then callers will not be able to access you in the Dial By Name directory of the Auto Attendant
- If you already accessed your mailbox for the first time and didn’t record your name announcement and/or greeting, you can do it now, by logging into your mailbox, Chose “0” for Mailbox options, “1” for Unavailable Message, “2” Busy Message, “3” Name, “4” Temporary Message, “5” Change Password, “*” Main Menu
Checking Voicemail

❖ **How to know you have new Messages:**
  - **Red** Indicator light will blink
  - An Envelope icon will appear next to your extension # on the LCD screen
  - When you pick up the handset will hear stutter dial tone

❖ **To check messages**
  - From your Polycom phone, press *Messages* button, the system will ask for your password
  - From another Abacus phone in your organization, dial * and your Mailbox #, the system will ask for your password, or dial *5000 you will be asked for your Mailbox # then your Password
  - From a phone outside your Abacus PBX system, dial your Auto Attendant or pre-assigned phone number (backdoor access) when you hear the Auto Attendant dial the pre-assigned “Check Voicemail” access assigned by your Administrator. You will be asked for your mailbox # and then your password.
When the “Do Not Disturb” button is pushed:

- A Blinking “X” will show in the display to the left of your Extension numbers.
- All calls when “Do Not Disturb” is activated will go directly to your Voicemail instead of ringing your phone

To turn off “Do Not Disturb”:

- Press the “Do Not Disturb” button again
- The icons to the left of your Extension numbers will return to normal
- Your phone will ring when you get a call instead of going directly to Voicemail
Using Voicemail

- **When listening to your Messages during Playback**
  - Option 1 = Replay all messages w/Time and Date Stamp
  - Option 2 = Replay current message only w/o Time and Date Stamp
  - Option 4 = Play previous message
  - Option 6 = Play next message
  - Option 7 = Delete current message
  - Option 8 = Forward message to another mailbox on the system
    - Press 1 to enter an extension
    - Press 2 to use the Directory
  - Option 9 = Save message in folders
  - Option 0 = Pause and Resume
  - Option * = Back-up
  - Option # = Forward
  - Note: if you don’t want to hear the Envelope information before your messages is played, you can Press 1 again to Skip during playback.
3 Way Conference

- You can Conference 3 people (including yourself)
- During an active call, press *Conference* button or the *Confrnc* soft key
- Enter number of the person you want to bridge in
  - Note: the first person is on hold during this time
- When that person answers, press the *Conference* button or *Confrnc* soft key to join all parties together
- If you would like to “split” the conference into two separate calls, you can press the *split* soft key.
Transferring a Call

Transfer

- **Blind**
  - Answer call
  - Press *Transfer* Button (or Soft key)
  - *Blind* soft key
  - Dial extension you want to transfer to
  - Press *Send* soft key

- **Consultative**
  - Answer call
  - Press *Transfer* Button (or Soft key)
  - Dial the extension you want to transfer to
  - Announce caller (the caller is on hold during this time)
  - Press *Transfer* again to complete the transfer

- **Directly to VM (w/o ringing the extension)**
  - Answer call
  - Press *Transfer* Button (or Soft key)
  - Press *Blind* soft key
  - Dial the extension followed by the * key
  - Press *Send* soft key
Call Forwarding – From the Phone

3 Types of Call Forwarding

- While the phone is in an idle state
- Press the Forward “Soft” key
- Choices are Forward:
  - Always (Enter Phone #)
  - No Answer (After “X” rings)
  - Busy (Enter Phone #)
Redial & Hold Buttons

- **Press “Redial” Button**
  - Redials the last number dialed (if your phone has one)

- **Press “Hold” Button**
  - Press to put call on Hold
  - To Rejoin the call, press Hold again or the flashing line key (if your phone has one)
2 Way Intercom

- Allowed users can initiate
- All users can respond
- Press *1, dial extension #, then press send or dial
- The user on the receiving end will hear a short ring, then their speakerphone/microphone will be activated and they can speak with you hands free
- This is a one to one intercom

**Note:** These features are only available in certain feature packages with the Polycom phone and need to be enabled in your profile (if available), by your administrator.
Transfer a call to a “Parking Spot” to be retrieved at another phone on the Abacus PBX

- **To Park a Call:** *70
  - Transfer + *70 + Send or Dial and wait for the system to give a “Parking Spot Number”, remember it and then hang-up
- **Un-Park a Call:** *71 (From any phone on the Abacus PBX)
  - Dial *71 + the “Parking Spot Number” + Send or Dial to pick-up the call parked in the assigned “Parking Spot”

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Directed Call Pick-Up: *8

- Lets a user retrieve a call that is ringing at another extension by dialing *8, followed by the extension number

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Polycom SoundPoint IP 550/560 Phone

Polycom SoundPoint IP 550/560 Phone Basic Tutorial Link: