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IP PHONE QUICK START GUIDE SERIES

YOUR GUIDE FOR:

Polycom IP 33x

CloudBusinessPhone.com

Polycom 2-Line Desk Phone Quick Reference Guide IP331 / IP335

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1. Getting Started

Your Polycom 2-Line Desk Phone (IP331/IP335) is a full-featured, Voice-Over-IP (VoIP) phone with unique features accessible both on the device itself, and online.



We have developed proprietary software that your phone will download when you plug it in to your local network with access to the Internet.

To get started, **here is a quick, 3-step process** to start using your new phone:

1. Installing / Hooking Up Your Phone
2. Activating Your Phone and Line of Service
3. Setting Up Your Voicemail Box

1.1 Installing / Hooking Up Your Device

This Quick Reference Guide will cover the basic steps to hook up your phone. You may also refer to the **Quick Install Guide**, which is included in the box.

The first-time setup of the phone will involve downloading files from the Internet. **Please allow 4-5 minutes** for the phone to download its configuration when it is first connected.

1. **Remove the following equipment** from the box:
   - The desk phone, stand,
   - handset, power cable,
   - RJ-9 handset cable, and
   - RJ-45 Ethernet cable.
2. Using the RJ-9 handset cable, **connect the phone's handset** to the port on the back of the phone labeled "Handset." **Caution**: Be sure to *avoid* accidentally plugging the handset into the port labeled "Headset."
3. Using the RJ-45 Ethernet cable, **connect your phone to your Local Area Network**. Plug the cable into the port labeled "LAN" on the back of your phone.
4. Using the power cable, **connect the phone to an electrical outlet**.
5. **Attach the stand** to the phone so that the stand rests firmly on a flat surface, with the cables running between the phone and the stand.
6. **Allow 4-5 minutes** for the phone to download its configuration files.
7. When ready, the phone will display its **extension number** and the **current date and time**.

Problems installing or hooking up your phone? Refer to the '**Additional Support**' section.

1.2 Activating Your Device and Line of Service

NOTE: Activating a Line of Service will immediately begin the billing for that Line of Service.

Activating Lines

1. Log in to your Control Panel, and select **Manage Voice Services**.
2. Click on the "**Activation**" tab.
3. Under "Line Activation", **select the checkbox** for one or more Lines of Service, and press the "**Activate**" button.

Activating Phones

If you have purchased your phone from us, then these steps are not required.

If you are adopting a phone that you have purchased yourself through the Bring Your Own Phone (BYOP) program, then your phone will require activation through Control Panel.

1. Log in to your Control Panel, and select Manage Voice Services.
2. Click on the "**Activation**" tab.
3. Under "Phone Activation", **enter the MAC Address(es)** of the pre-purchased phones.
4. When all MAC Addresses have been entered, press "**Save Changes**".

1.3 Setting Up Your Voicemail Box

Recording an Outbound Voicemail Greeting

1. Press the Message soft key.
2. Press 1 for Messages.
3. Press the Connect soft key.
4. Enter your PIN when prompted. The first-time PIN is '0000'.
5. Follow the prompts to set up the following:
    a. Your new PIN
    b. Your recorded name
    c. Your outbound voicemail greeting

2. The Basics

This section provides quick, step-by-step instructions for many of the most-used features of the phone, including placing and receiving calls, placing callers on hold, changing call volumes, and more.

2.1 Changing Your PIN

Changing the PIN from the phone

Note that this PIN is used for checking voicemail, logging into Command Mode, and logging into the Teleweb for your phone. Changing the PIN in one place will take effect in all of those places.

1. Press the **Menu** button.
2. Press 1 for **Features**.
3. Press 1 for **Messages**.
4. Press 1 for **Message Center**.
5. Press the **Connct** soft key.
6. Enter your PIN when prompted.
7. Select option **8** for User Options.
8. Select option **3** to Change the PIN.
9. Enter the new PIN when prompted.

Your new PIN:

- Must be between 6 and 10 numeric-only digits
- Must not start with “0”.
- Must not contain sequential digits, such as “123”.
- Must not contain repeating digits, such as “111”.

You can also reset your desk phone’s PIN online.

2.2 Placing Outbound Calls

When the phone is not in use

1. Pick up the handset or press the speakerphone button.
2. Dial your desired party's 3-digit extension number or phone number.

When you are already on a call

1. To place your current caller on hold on Line 1, and get dial tone for an outbound call on Line 2, press the "Line 2" button while the second line is not in use..
2. Dial your desired party's 3-digit extension number or phone number.
3. You can resume the original call by pressing "Line 1" button again.

2.3 Handling Inbound Calls

When an inbound call rings on a Polycom 2-Line Desk Phone, the screen will display soft keys with the options to "Answer", "Reject", or “Ignore” the call.

If the phone is currently idle, the phone will ring at the set volume. If the phone is currently in use, then a second incoming call will be indicated by a call waiting beep.

Answering an Inbound Call…

…On The Handset

- Pick up the handset to answer the call, and begin speaking.

…On A Headset

- When a headset is connected to the Headset jack, press the "Answer" soft key to answer calls on the headset.

…On Speakerphone

- Press the Speakerphone button (or the "Answer" soft key) to answer the call, and begin speaking.

Rejecting an Inbound Call

- Press the "Reject" soft key to immediately send the caller to the phone's No Answer Forwarding destination (default: voicemail).

Ignoring an Inbound Call

- Press the "Ignore" soft key to send the caller to the phone's No Answer Forwarding destination (default: voicemail). The caller will first continue to hear ringing for the specified amount of time, defined in the phone’s No Answer Forwarding settings.

2.4 Volume and Mute Controls

Adjusting Volumes

In-Call Volumes

- While on a call, press the "**+**" and "**-**" buttons to make your own and/or the other party's volumes louder or softer as desired.

Ringer Volume

- While the phone is not in use, press the "**+**" and "**-**" buttons to adjust the volume of the ringer on the phone.

Using Mute

1. To mute the microphone on an active phone call, press the Mute button.
2. To un-mute the line, press the Mute button again.

2.5 Checking Voicemail

To access new voicemails on a Polycom 2-Line Desk Phone…

1. Press the **Menu** button.
2. Press 1 for **Features**.
3. Press 1 for **Messages**.
4. Press 1 for **Message Center**.
5. Press the **Connct** soft key.
6. Press 1 to listen to Voicemails.

2.6 Handling Call Waiting

When an inbound call rings on a Polycom 2-Line Desk Phone, the screen will display soft keys with the options to either "Answer" or "Reject" the call. You will also hear a single tone emitted by your phone, either through the handset, or through the speakerphone.

To Answer The Second Call

1. Press the flashing "Line 2" button to access that call. The current call will be placed on hold on Line 1.
2. Once the second call has ended, the phone will display the option to resume the original call with the "Resume" soft key. Alternatively, you can press the flashing "Line 1" button to resume the first call.

To Reject The Second Call

- Press the “Reject” soft key to immediately send the caller to the phone’s No Answer Forwarding destination (default: voicemail).
- Your original call will continue uninterrupted.

To Ignore The Second Call

- Press the "Ignore" soft key to send the caller to the phone's No Answer Forwarding destination (default: voicemail). The caller will first continue to hear ringing for the specified amount of time, defined in the phone’s No Answer Forwarding settings.
- Your original call will continue uninterrupted.

2.7 Utilizing Speakerphone

While the phone is not in use

- Press the speakerphone button to activate the speakerphone and get dial tone for an outbound call.

While on a call on the handset / headset

- Press the speakerphone button to continue the current call on the speakerphone.

While a call on speakerphone is active

- To hang up the current call, press the speakerphone button.

2.8 Transferring Calls In Progress

Blind Transfers

1. While on a call, press the **Trnsfr** soft key.
2. Press the **Blind** soft key.
3. At the sound of the dial tone, dial the desired phone number or extension number.
4. The call is automatically transferred, and you may now safely hang up the phone.

Attended Transfers

1. While on a call, press the **Trnsfr** soft key.
2. At the sound of the dial tone, dial the desired phone number or extension number.

3. Wait for the terminating party to answer, and tell the terminating party that you are transferring the call to them.
4. Hang up the phone to perform the transfer.

3. More Features

3.1 Placing / Retrieving Calls On Hold

Placing Calls On Hold

- While on a call, press the Hold button.

Retrieving Calls On Hold

- Press the Resume soft key to resume the holding call on that line OR
- Press the Line button with the red flashing light, indicating that a call is holding

3.2 Placing / Retrieving Calls On Park

Placing Calls On Park

Method 1

1. While on a call, press the **More** soft key, followed by the **Park** soft key. (The default Call Park Group Number is '9000'.)
2. Listen and watch for the Call Park Slot Number that the caller was parked on (For example, this might be '9001', '9002', or etc.). Make note of this Call Park Slot Number. If the code is forgotten, there is no other way to retrieve the caller on Park.

Method 2

1. While on a call, transfer the caller to the desired Call Park Group Number. (The default Call Park Group Number is '9000'.)
2. Listen and watch for the Call Park Slot Number that the caller was parked on (For example, this might be '9001', '9002', or etc.). Make note of this Call Park Slot Number. If the code is forgotten, there is no other way to retrieve the caller on Park.

Retrieving Calls On Park

- To be connected to a parked caller, pick up the phone, and dial the desired Call Park Slot Number.

3.3 Forwarding Calls

The Polycom 2-Line Desk Phone has three different settings that control call forwarding for different scenarios. They are:

- **"Always Forward"** – Forward all inbound calls without ringing the desk phone first
- **"Forward On Busy"** – Forward inbound calls when the desk phone is busy (on both lines)
- **"Forward On No Answer"** – Forward calls when the desk phone rings, but is not answered.

In this section discussing the Call Forwarding settings, we'll show you:

- Where to locate the settings,
- What the settings do,
- How to toggle the settings On/Off,
- How to change where calls are forwarded, and • How to change the number of rings before transferring.

Where to Locate the Settings

1. Press the **Menu** button
2. Press **1** for **Features**
3. Press **3** for **Forward**

What the Settings Do

"Always Forward" will send all inbound calls directly to the Forwarding Number without ringing the desk phone first.

- By default, this feature is toggled **OFF**.

"Forward On Busy" will send inbound calls to the Forwarding Number if both of the phone's 2 lines are in use.

- By default, this feature is toggled **ON** and calls will be forwarded to the phone's Voicemail.

"Forward On No Answer" will send inbound calls to the Forwarding Number if the call is unanswered after a specified number of seconds.

- By default, this feature is toggled **ON** and calls will be forwarded to the phone's Voicemail.

How to Toggle the Settings On/Off

Each of the three call forwarding settings can be toggled on or off.

1. From inside the Call Forward menu, select the appropriate settings (Always Forward, Forward On Busy, or Forward On No Answer). Use the Up and Down Arrow buttons and the Checkmark button to select.
2. Press the Down Arrow once. The toggle setting will display, showing you the current Toggle setting of either Enabled or Disabled.
3. Press the Checkmark button to modify the Toggle setting, then use the Up and Down Arrow buttons to adjust the value.
4. Press the OK soft key to select the new Toggle setting.
5. Press the Left Arrow button, and when prompted if you would like to save the changes, press the Yes soft key.

How to Change Where Calls Are Forwarded

1. From inside the Call Forward menu, select the appropriate settings (Always Forward, Forward On Busy, or Forward On No Answer). Use the Up and Down Arrow buttons and the Checkmark button to select.
2. The current destination number will be listed here, under “Contact”. To edit this number, press the Checkmark button.
3. Press the “<<” soft key to delete the current number.
4. Enter the new desired destination number, then press the “OK” soft key.*
5. Press the Left Arrow button.
6. When prompted to “Save?” press the “Yes” soft key.

* To forward calls to the phone’s voicemail box, enter the phone’s own DID phone number.

How to Change the Number of Rings before Transferring

1. From inside the Call Forward menu, select Forward On No Answer, then select No Answer Time. Use the Up and Down Arrow buttons and the Checkmark button to select.
2. The current number of rings will be listed here, under “Fwd After Rings”. To edit the number of rings, press the Checkmark button.
3. Press the “<<” soft key to delete the current number.
4. Enter the new desired number of rings, then press the “OK” soft key.
5. Press the Left Arrow button.
6. When prompted to “Save?” press the “Yes” soft key.

3.4 Utilizing the Directory

Contacts in the Directory have the following fields / settings that can be modified:

- First Name
- Last Name
- Contact (the contact phone number)*
- Speed Dial Index
- Label
- Ring Type
- Divert Contact (toggle)
- Auto Reject (toggle)
- Auto Divert (toggle)

* The only required field for a Contact is the “Contact”, or destination number, field.

Navigating to the Directory

1. Press the Menu button
2. Press 1 for Features
3. Press 4 for Contact Directory

Programming a Contact in the Directory

1. From the Contact Directory, press the Up Arrow once to go to “<New Entry>”, and press the Checkmark button.
2. Specify as many values as desired for the new Contact. Only the “Contact” field is required, which is the field for the phone number. Use the Up/Down Arrow buttons to navigate the fields, and use the Checkmark button to edit a field.
3. Press the Left Arrow button when done editing the contact’s information.
4. Press the “Yes” soft key when prompted to save the new contact.

Dialing from the Directory

1. When the phone is not in use, press the “More” soft key, followed by the “Dir” soft key.
2. Find the desired Contact using the Up and Down Arrow buttons, then press the Dial button.

3.5 Full List of Features

The features that we’ve covered in this Quick Reference Guide is not an exhaustive list of all the features this phone supports. To find a full listing of this phone’s features, please refer to this phone’s Owner’s Manual. Many valuable resources are also available on our Knowledge Base.

4. Additional Support

4.1 Utilizing the Knowledge Base

Our Knowledge Base is a valuable resource, full of helpful information.

1. In a web browser, navigate to http://controlpanel.msoutlookonline.net/KB/main/.
2. From the main index, navigate to "**Voice Services** -> **Hosted PBX**".