

SCOPSERV
INTERNATIONAL INC.

ScopTEL IP PBX Polycom End-User Training



The ScopTel IP PBX includes a Web based user interface:

- For checking voicemail messages and managing your voice mailbox
- For checking call detail records (call history)
- For changing call forwarding and find-me follow-me rules



First Time Voicemail Setup

1. Log into your voicemail by pressing the “Messages” button on your phone. Enter your administrator assigned voicemail password and press the # key:
 - Press 0, then 5
 - Follow the prompts to change your password.
2. Record your unavailable message:
 - Press 0, then 1
 - Follow the prompts
3. Record your busy message:
 - Press 0, then 2
 - Follow the prompts
4. Record your name prompt:
 - Press 0, then 3
 - Follow the prompts
 - Make sure you say your Name AND Extension
5. If you record your temporary greeting this will override your busy or unavailable message.



Dialling Out

- Polycom phones use “soft keys” for call control. The display on your phone will change depending on call status.
- To make an internal call dial any digits.
- To make an outside call dial 9 plus any digits.
- Long distance calls may require your pin code after you dial.
- If you don't select hands free or pick up the handset before dialling then you must press dial after entering the phone number to complete your call.



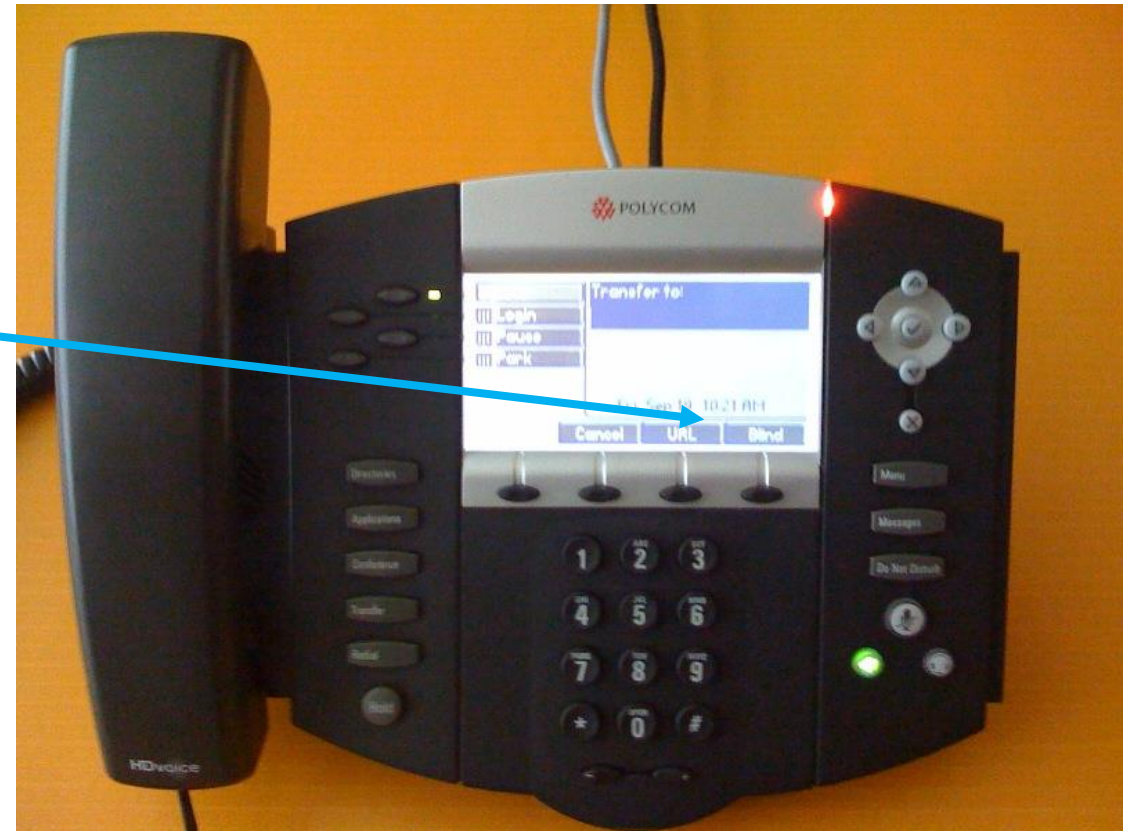
Transferring calls

- There are two kinds of transfers; “screened” and blind”.
- To start a transfer press the “**transfer**” button.



Blind Transfer

- There are two kinds of transfers; “screened” and “blind”.
- To make a blind transfer:
 - press the transfer
 - press “**blind**” button
 - dial the extension number or press the correct speed dial key to complete the transfer.



Screened Transfer

- There are two kinds of transfers; “screened” and “blind”.
- Screened transfers are useful when you want to announce the outside caller first to the intended user.
 - First press the “transfer” button and using the “Transfer to:” option dial the extension number or soft key to enter the desired extension number.
 - When the party picks up announce the caller.
 - To complete the transfer then press “transfer” or “join”.



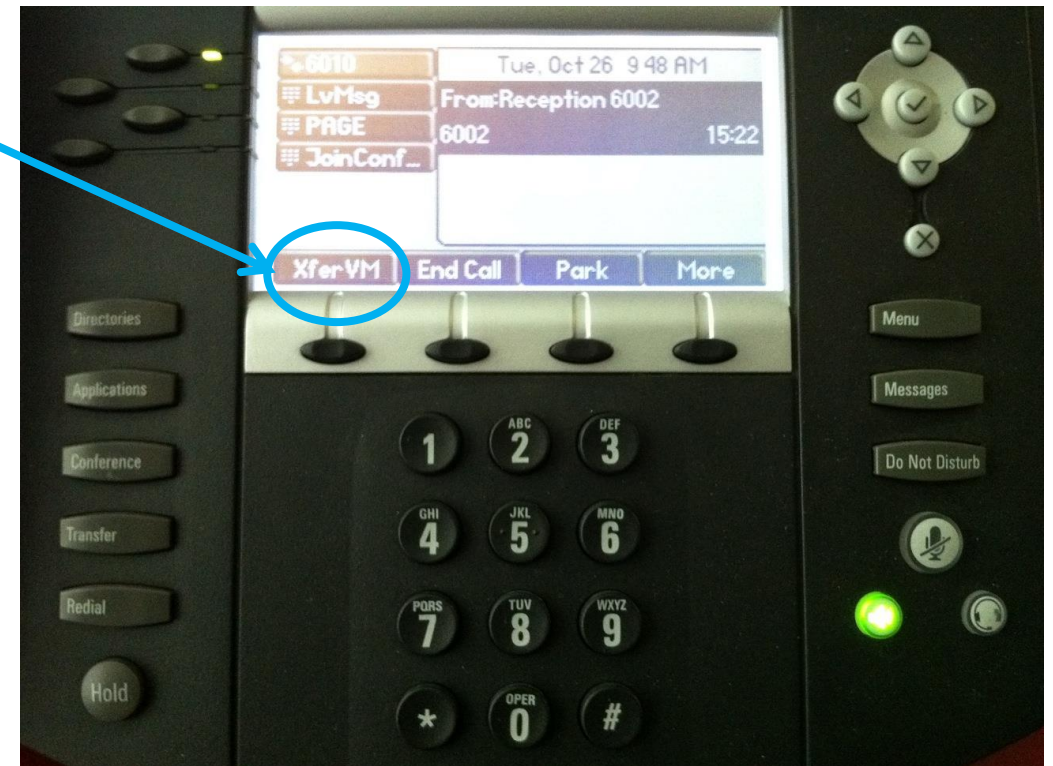
Handling multiple calls

- Each line key on a Polycom phone can handle multiple calls as defined by the system administrator.
- To control multiple calls use the up and down arrow navigation keys. Use the “resume” button to retrieve a held call.
- Even with many calls on hold you can still make an outgoing phone by using the keypad. Just make sure that all active calls are on hold first.



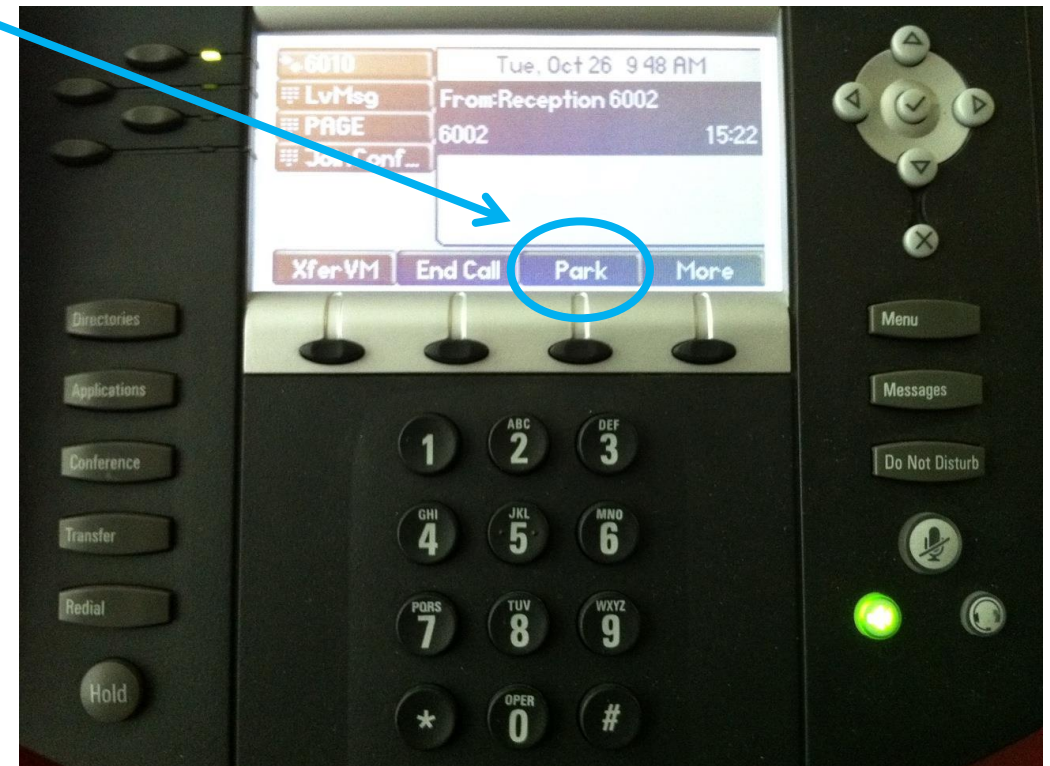
Direct Transfer to Mailbox (DTMB/XferVM)

To transfer a caller to a voicemail box press the **XferVM softkey** and then use the keypad to enter the voicemail box number followed by the # key.



Parking calls Polycom

- To Park a call on the Polycom press the **Park softkey**.
- You will hear a parking lot announcement telling you where the call is parked.
- Announce the parking lot number to the intended party so they can pick up the parked call by dialling the parking lot number from any phone on the system.



Recording a Phone Call

If your administrator allows you to record your phone calls then press the Record softkey to record your active call. Note: This will play a beep when you activate the record feature and a beep if you press the record softkey again to stop the recording.

The system only records the portion of the call between beeps. If you only activate the record feature once and do not press the softkey a second time the call will be recorded until you hang up.

Recorded calls are visible in the reporting section of the ScopTEL web interface in the Call Details reports. The administrator has access to these files. Your administrator must give you web login access if you wish to see these reports yourself.

Recordings are saved as .WAV files in the ScopTEL hard drive(s).



Conference Group Feature

The Conference Group Feature allows you to create ad hoc conference calls on your phone without any limit on the number of participants.

- Start out by making one call. Then press the **ConfGrp softkey**.
- You will be prompted for a room number.
- Use the keypad to enter any room number from 00-99.
- Hang up.

Note: You can have up to 100 separate conference groups in use at any given time. So use one conference room number per conference.

- Make another call and press the **ConfGrp softkey** again.
- You will be prompted for a room number.
- Use the keypad to enter the same room number as before to join this caller to the same conference group.
- Hang up.
- Press the **JoinConf button** and use the keypad to dial the conference room number to join yourself to an active conference.



Voicemail Login: checking messages from your phone

- To check your voicemail box from your own extension press the “**Messages**” key. You will be prompted for your password.





Dialing in from an outside phone to access Voicemail Main and Check messages

- To check your voicemail box from outside dial the backdoor “voicemail main” number or an operator can transfer you to the “voicemail main” extension.
- The administrator can set up an Auto Attendant with a menu option to access the “voicemail main” application remotely. This is especially useful if a toll free number is used.
- When the “voicemail main” application answers:
 - You will be prompted for your extension number followed by the # key.
 - Next you will be prompted for your password followed by the # key.



Viewing Call Log Polycom

- To see your Call Log press the “**Directories**” key.
- Press “2. Call Lists” to access your call history.



Viewing Phone Status and ACD Wallboard

- The Polycom 4/5/6xx series phones show your phone status on screen.
- The screen updates every 15 seconds by default if activated by the system administrator.
- This is especially useful if you are logged in as a contact center agent and wish to see agent ACD status and calls status.



Using the XML phone directory

- If this feature is enabled on your phone you can scroll through the directory and call other extensions.
- Press the directories key.
- You can also use the “Buddies” key.
- Use the directional arrows to see the extensions in the directory.
- Press the “Dial” soft key to call the selected extension.
- The Polycom 6xx series phones support up to three 14 button expansion modules.
- You can also build your own custom directory entries.

