

Polycom VVX 301 & VVX 401

Long Format Guide

The Long Format Guide has detailed information on the most popular features. There are also videos and quick tips available at impulse.net/begin.

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Phone Layout



Reading the Guide

The guide is dense with instruction. We've tried to make it clear for you. Here's a hint. We will refer to four kinds of buttons:

- *Softkeys*: are context sensitive and lined up along the bottom of the display. *Softkeys* will be *italicized* and labeled softkeys
- Pre-programmed buttons: are hard keys on the phone, like speakerphone. We will refer to these simply as buttons
- Keypad: These are just the numbers 1-9 plus * 0 #
- On-Screen objects will be in **bold** like **Settings**

How to Use Your ClearStar Phone

The phone is menu driven. There are softkeys and a set of arrows located on a dial with the center being "Select".

Placing a Call

To place a call or dial an extension when the phone is idle, dial the extension or telephone number. Lift the handset or press the Speakerphone button.

Answering the Phone

When you are receiving a call, the phone will ring and the display will identify the incoming caller by name and number when available. To answer:

- Pick up the handset or
- Press the Speakerphone button or
- Press the Headset button or
- Press the *Answer* softkey

To mute a call, press the Mute button. The Mute button will turn red.

TO ANSWER A SECOND CALL/CALL WAITING

A second incoming call will be indicated by both an audible beep and an onscreen display of **Incoming Call**. To answer the second call:

- Let your first caller know you want to pick up another call, then
- Press the *Answer* softkey

The active call will be displayed on the screen above the held call.

- To resume the original call, press the down arrow, and then press the *Resume* softkey
- Your second call will remain on hold and you must press the *Resume* softkey to return to it
- Press the *End Call* softkey on an active call to disconnect that call

Call Hold

To put an active call on hold, press the *Hold* softkey.

To pick up the call from hold, press the *Resume* softkey then pick up the handset.

Voicemail

The first time you call your voicemail, you will need to set up a new passcode and record your name (not a greeting, just your name). Simply follow the prompts. You should have received a Welcome Letter with your temporary passcode. Ask your administrator for the voicemail portal phone number to check messages from home.

FROM YOUR VOIP PHONE

- Press the **Envelope** button
- Enter your passcode and press Pound (#)

FROM ANY PHONE

- Dial your extension or personal direct telephone number and wait for voicemail to pick up • Press Star (*)
- Enter your passcode and press Pound (#)

OR

- Dial the voicemail portal telephone number
- Enter your extension
- Enter your passcode and press Pound (#)

TO CHECK A GENERAL VOICEMAIL BOX

- Press the **Envelope** button
- Press Star (*)
- Dial the general voicemail box extension, then the passcode followed by Pound (#)

Note: To clear the Message Waiting indicator

- Dial *99
- Press the Speakerphone button
- Listen for “Voice Message Waiting Indicator has been cleared”
- The call will automatically disconnect

Call Transfer

Call Transfer is used to move an active call to another phone or into voicemail. There are three types of Call Transfer:

- Consulted/Regular Transfer
- Blind Transfer
- Direct Transfer to Voicemail

You decide which one is best for the business scenario at hand. The default transfer type is consulted.

CONSULTED TRANSFER

This will allow you to let the person receiving the call know who is on the line before completing the transfer. YOUR Caller ID information will be presented to the receiving party.

- While on a call, press the *Transfer* softkey
- Dial extension (or phone number) you want to send the held call to
- Remain on the line until the person answers
- Announce the name of the person who would like to be transferred
- If accepted, press the *Transfer* softkey to complete transfer
- You may hang up the handset at this time
- If the call is not accepted, press the *Cancel* softkey to return to the caller and ask if they wish to be transferred directly into voicemail

BLIND TRANSFER

This will allow you to send a call directly without any introduction. If unanswered, the call will go into voicemail (or forward if that is programmed). This transfer will pass through the Caller ID information of the caller (NOT yours).

- While on a call, press and hold the *Transfer* softkey
- Press 2 to highlight **Blind**
- Press the *Select* softkey
- Dial the extension
- Press Pound (#) to send the digits immediately
 - You may now hang up the handset

DIRECT TRANSFER TO VOICE MAIL

If a coworker is out of the office or does not want to be interrupted, you may send a call directly into voicemail. The receiving extension will not ring and will not show a missed call. If the caller leaves a message, the message will be delivered in the usual way.

- While on a call, press the *Transfer* softkey
- Dial *55
- Dial the extension number
- Press Pound (#)
- You may now hang up the handset

CHANGING TRANSFER DEFAULT

If you do many more blind transfers than consulted transfers, you can change the default transfer type to blind.

- Press the Home button
- Press the right arrow about five times to highlight **Settings** (the **Gear** icon)
- Press 1 on keypad, or scroll to and select onscreen **Basic**
- Press 1 on keypad, or scroll to and select onscreen **Preferences**
- Press 10 on keypad, or scroll to and select onscreen **Default Transfer Type**
- Use the up and down arrows to scroll to **Blind**
- Press the *Select* softkey to choose **Blind**
- Now you can swap the above instructions for blind and consulted transfer

Three-Way Calling/Conference Call

This is a standard function that allows you to talk to two parties at the same time. If your account is configured as an Executive User, you may speak to up to five parties at once.

- While on an active call, let Caller A know you'll be right back with Caller B
- Press the *Confrnc* softkey (this puts Caller A on hold)
- Dial Caller B's number, press Pound (#) to send the digits immediately
- After Caller B answers, let him know you will be conferencing in Caller A
- Press the *Confrnc* softkey
- Now everyone is together
- Your display will show Conference

When you have finished speaking with everyone, press the *End Call* softkey to be certain everyone is disconnected.

You can also join an incoming call with an active call

- While on a call with Caller A, you get a call from Caller B
- To include Caller B, let A know you'll be right back with B
- Press Answer softkey (This puts A on hold and answers B)
- Press More softkey and Join softkey ;
- Now everyone is together
- Your display will show Conference

When you are finished with the call and would like to disconnect everyone, press *End Call*.

If you have the Executive Seat six-way calling feature, you may simply continue this process as needed.

SIX-WAY CALLING

If you have the executive seat, you have six-way calling. To create a six-way call:

- Place your first call
- Press *Conference*
- Place your second call
- Once it is answered, press *More* and press *Conference*
- Press *Hold*
- Press *New Call* • Place third call
- When answered, press *Join*
- Press *Hold*
- Press *New Call*
- Dial fourth call
- When answered, press *Join*
- Press *Hold*
- Press *New Call*
- Place fifth call
- When answered, press *Join*

When you are finished with the call and would like to disconnect everyone, press *End Call*.

Call Forward

If you will be out of the office, you may send your calls to another extension or a number outside of the office system, including your mobile number. Any new voicemail messages will be left on the forwarding destination voicemail, not your office line. There are two types of Call Forward:

- Call Forward Always — Forwards all calls immediately
- Call Forward No Answer — Forwards all calls after ringing the desk phone

If you have a second phone programmed with your extension, you will not have a *Forward* softkey. You will need to use Feature Access Codes (see below under **Multi-Phone Users**).

CALL FORWARD FOR SINGLE PHONE USERS

To Enable/Disable Call Forwarding

- Press the *Forward* softkey to view this menu:
 1. Call Forward “Always”
 2. Call Forward “No Answer”
- Press 1 or 2
- Enter the Call Forward destination (phone number)
- Press the *Enable* or *Disable* softkey
- There will be a Forward message displayed near your extension at the top left

CALL FORWARDING FOR MULTI-PHONE USERS

Call Forward Always

To enable

- Dial *72
- Enter the number you want to forward to
- Press the Speakerphone button
- Listen for the prompt, “Call Forwarding Always Service has been activated successfully. Thank you.”
- The call will automatically disconnect

To disable

- Dial *73
- Press the Speakerphone button

- Listen for the prompt, “Call Forwarding Always Service has been deactivated successfully. Thank you.”
- The call will automatically disconnect
- To confirm the Call Forward Always setting, dial *21*
- Press the Speakerphone button
- Listen for the information.
- Call Forward Always is off by default
- The call will automatically disconnect

Call Forward No Answer

To enable

- Dial *92
- Enter the number you want to forward to
- Press the Speakerphone button
- Listen for the prompt, “Call Forwarding No Answer Service has been activated successfully. Thank you.”
- The call will automatically disconnect

To disable

- Dial *93
- Press the Speakerphone button
- Listen for the prompt, “Call Forwarding No Answer Service has been deactivated successfully. Thank you.”
- The call will automatically disconnect

To confirm the Call Forward No Answer setting

- Dial *61*
- Press the Speakerphone button
- Listen for the information.
- Call Forward No Answer is activated to voicemail by default.
- The call will automatically disconnect

Call Park

Call Park can be a confusing concept, but is actually very simple to use. Call Park places a call on a special type of hold that allows it to be picked up from any phone throughout your office, rather than only from YOUR phone. This feature allows you to “park” a call, walk to any other phone, then retrieve that call from your new location.

There are two types of Call Park: **System Park** and **Park Zones**. If you have Park buttons on your phone, you’ll use Park Zone. Otherwise, use System Park.

System Park

When parking a call, you must assign an extension to that call so you can retrieve it after you move to another phone. ANY extension may be used, as this is just a placeholder to retrieve the call later. For simplicity, park the call at the extension of the person the call is for.

PARKING A CALL

- While on a call, press the *Transfer* softkey
- Dial *68
- Enter the extension (of whom the call is for) followed by Pound (#)
- The parked caller will now be placed on hold
- Hang up

PARK PICKUP

To retrieve a parked call

- Dial *88
- Enter the extension where the call was parked or pick up the handset and continue your call

Park Zone

When using Park Zones, the Park Zone button(s) will appear below your extension. The benefit of this feature is the buttons appear on all phones across the office, and a parked call will light up red on each of them.

PARK ZONE - PARK

While engaged in one call:

- Press *Transfer* softkey
- Press *Blind* softkey
- Press any of the Park Zones that are unlit
- Hang up the handset

PARK ZONE - UNPARK

From any phone

- Lift telephone handset
- Press the lit Park Zone to be connected

Blocking Caller ID

If you want to place a call and block your caller ID name and number

- Dial *67
- Dial the number you want to call

Note: Some numbers do not accept calls from blocked numbers.

Mute Music on Hold

If you are calling into a bridge and you expect you will want to pick up your call waiting, use this feature to mute your music on hold for this call.

- Dial *60
- Dial the number you want to call

Phone-Top Features

Adjusting the Volume on the Phone

Note: These buttons are located at the bottom of the phone.

- While the phone is idle, the Volume buttons adjust the ringer
- While on the Handset, Headset or Speakerphone, the Volume buttons adjust the volume for that mode

Changing the Ring Type

To change the ring type

- Press the Home button
- Press the right arrow several times to highlight **Settings** (the **Gear** icon)
- Press Select
- Press 1 on keypad, or scroll to and select onscreen **Basic**
- Press 5 on keypad, or scroll to and select onscreen **Ring Type**
- Press 1 on keypad, or scroll to and select onscreen **Default**
- Use the up and down arrows to scroll through the list of ring types
- Press the *Play* softkey to hear the ringtones
- Select your preferred ring tone
- The active ring tone will have a check mark in the box in front of it

Missed Calls - Clearing Alert

When you have missed calls, the date will scroll and display the number of missed calls (see top right of screen).

To clear, you must review your list of missed calls. While the phone is idle, the easiest way is to press the down arrow key. This brings you to a list of your recently missed calls. If you press the left arrow, you will be back at the Home screen. If you press the right arrow, you will place a call to the number selected.

Directory

There are two separate directories the phone can access. The first directory is the phone's native directory labeled **Contact Directory**. You can save numbers yourself by directly entering them or saving them from *Recent* calls. See below for details. The second directory is the **ClearStar Directory**. This can be searched in real time.

- The *Directory* softkey will get you to the menu, or
- Press the Home button
- Scroll to **Directories** and press Select

To view your personal directory entries,

- Press **1 Contact Directory**
- For quick results, press *Search* softkey to find a specific name or number
- Scroll to preferred entry, then press *Dial* softkey to call

To reach the live, searchable system directory

- Press the Home button to the right of the display
- Tap the **Phone Book** icon labeled **Directories**
- Press 4 on keypad for "**4 ClearStar Directory**"
- Type the name using the keypad
- Press *Submit* softkey
- Scroll to preferred entry, then press *More* softkey and *Dial* softkey to call

Favorites

Favorites are useful if you have a small group of telephone numbers you call regularly. You can save a phone number or a Feature Access Code (like *98) to the phone and arrange them into a **Favorites Index**.

The easiest way to access your Favorites list is by pressing the up arrow while the phone is idle. You may also access your Favorites list from the Directory.

SAVING NUMBERS FROM RECENT CALLS AS FAVORITES

- Press the Home button
- Scroll to **Directories** and press Select
- Scroll to **Recent Calls** and press Select
- Scroll to the number you want to save
- Press the *Info* softkey
- Press the *Save* softkey
- Make changes to the First Name, Last Name and Contact (telephone number) as needed
- Scroll down and add to Favorite Index (starting with 1)
- Press *Save* softkey
- Press Home button to exit

SAVING NUMBERS FROM DIRECTORIES TO FAVORITES

- Press the Home button
- Scroll to **Directories** and press Select
- Press Select for **Contact Directory**
- Press the *Add* softkey
- Enter the First and Last name with keypad
- Enter the phone number (or feature access code) under **Contact**
- Enter a number into the **Favorite Index** (If this is your first one, enter 1)
- Press the *Save* softkey

CALLING FAVORITES

- Press the Up arrow
- Scroll to the name and press the *Dial* softkey

Phone Reboot

Periodically, the phone may need to be rebooted. Reasons for this include accepting a new configuration, new software upgrade, or restoring Busy Lamp Field appearances after Impulse maintenance.

There are two ways to reboot the phone:

- Unplug the power supply
 - Wait two seconds
 - Plug in the power supply
- OR
- Press and hold the following numbers: 1, 3 and 8 until the phone beeps and shows **Restarting Phone.**

Note: The reboot process is complete when the idle display and current time are on the screen.