



USER GUIDE

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# Poly CCX Business Media Phones with Skype for Business

## Getting Help

For more information about installing, configuring, and administering Poly/Polycom products or services, go to Polycom Support.

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# Before You Begin

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## Topics:

- [Audience, Purpose, and Required Skills](#)
- [Related Poly and Partner Resources](#)

This user guide helps you configure Poly settings available on your CCX business media phone when running Microsoft Skype for Business.

This user guide supports the following Poly phones with Skype for Business enabled:

- CCX 500 business media phones

## Audience, Purpose, and Required Skills

This guide is intended for Poly phone users running Skype for Business. Administrators and users can refer to this guide to configure Poly settings available on the phone's local interface.

## Related Poly and Partner Resources

See the following sites for information related to this product.

- The [Polycom Support Site](#) is the entry point to online product, service, and solution support information including **Licensing & Product Registration**, **Self-Service**, **Account Management**, **Product-Related Legal Notices**, and **Documents & Software** downloads.
- The [Polycom Document Library](#) provides support documentation for active products, services, and solutions. The documentation displays in responsive HTML5 format so that you can easily access and view installation, configuration, or administration content from any online device.
- The [Polycom Community](#) provides access to the latest developer and support information. Create an account to access Poly support personnel and participate in developer and support forums. You can find the latest information on hardware, software, and partner solutions topics, share ideas, and solve problems with your colleagues.
- The [Polycom Partner Network](#) are industry leaders who natively integrate the Poly standards-based RealPresence Platform with their customers' current UC infrastructures, making it easy for you to communicate face-to-face with the applications and devices you use every day.
- The [Polycom Collaboration Services](#) help your business succeed and get the most out of your investment through the benefits of collaboration.

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# Getting Started

## Topics:

- [Product Overview of Poly CCX Business Media Phones](#)
- [Logging In to and Locking Your Phone](#)
- [Accessibility Features](#)

This section provides information on getting started with your Poly CCX business media phones running Skype for Business.

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**Note:** As you read this guide, keep in mind that your system administrator configures certain features or your network environment may determine them. As a result, some features may not be enabled or may operate differently on your device. Additionally, the examples and graphics in this guide may not directly reflect available options or what your device screen displays.

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# Product Overview of Poly CCX Business Media Phones

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## Topics:

- [CCX Phone Hardware Overview](#)
- [Navigating Poly CCX Business Media Phones](#)
- [Using a Phone as a Common Area Phone](#)
- [Enter Information Using the Onscreen Keyboard](#)

Poly CCX Business Media Phones with Skype for Business support audio-only conference calls.

The following features are available on CCX series phones with Skype for Business:

- Placing, answering, and managing audio calls
- Initiating, joining, and managing audio conference calls
- Recording audio calls with USB flash drives
- Viewing and joining scheduled calendar meetings
- Managing contacts, call lists, and directories
- Adjusting call and phone settings
- Pairing with Bluetooth-enabled devices
- Checking voicemail messages
- Connecting to a computer over USB

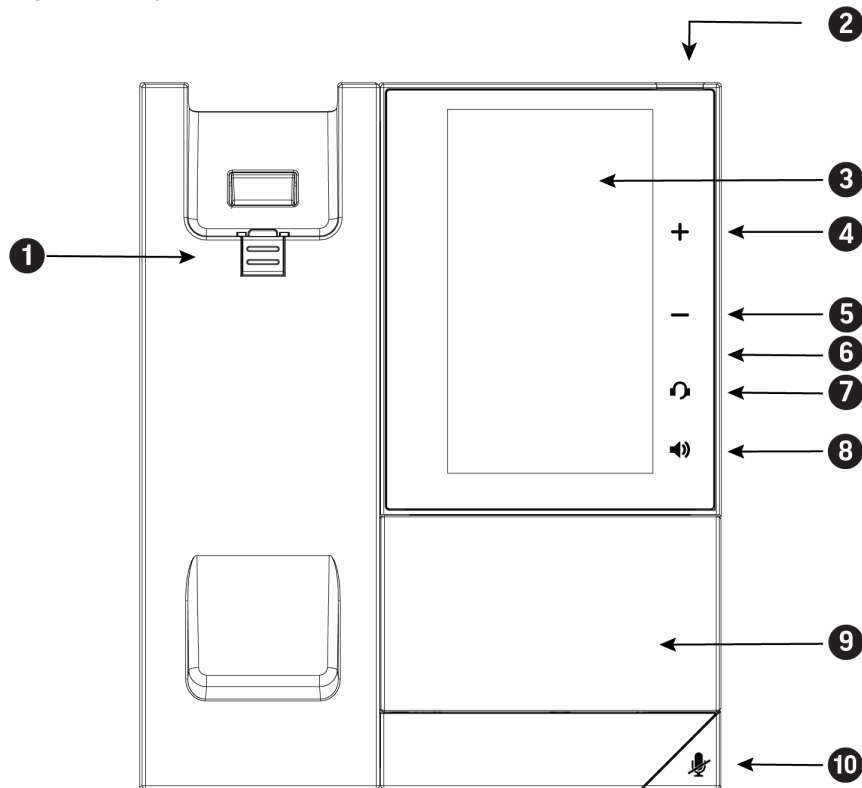
## CCX Phone Hardware Overview

The following topics describe the hardware features for Poly CCX Business Media Phones.

### Poly CCX 500 Business Media Phone Hardware

The following figure displays the hardware features on Poly CCX 500 Business Media Phones. The table lists each feature numbered in the figure.

**Figure 1: Poly CCX 500 phone hardware features**



**Poly CCX 500 Phone Hardware Feature Descriptions**

Reference Number	Feature	Feature Description
1	Reversible tab	Secures the handset in the cradle when you position your phone stand at a high angle. To secure the handset, remove the tab, reverse it so the protrusion points up, and reinsert it. Position the handset so the protrusion on the tab fits into the slot on the handset.
2	Message waiting indicator	Flashes to indicate when you have an incoming call. Flashes red to indicate when you have new messages.
3	Touchscreen	Enables you to select items and navigate menus on the touch-sensitive screen.

Reference Number	Feature	Feature Description
4,5	Volume keys	Adjusts the volume of the handset, headset, speaker, and ringer.
6	USB port(s)	Enables you to attach a USB flash drive or USB headset. Poly CCX 500 phones include one USB-A port and one USB-C port.
7	Headset indicator	Displays when the phone is powered on. The icon glows green or blue when a headset is connected and activated.
8	Speakerphone indicator	Displays when the phone is powered on. The icon glows green when activated.
9	Speaker	Provides ringer and speakerphone audio output.
10	Mute key	Mutes local audio during calls and conferences.

## LED Indicators on CCX Series Phones

CCX series phone LEDs indicate phone and accessory states.

### CCX Series Phones LED Descriptions

LED	Color State and Description
Speakerphone	Off – Phone is in sleep mode. White – Speakerphone is off, but the phone is active. Green – Speakerphone is on.
Headset	Off - Phone is in sleep mode. White – No headset is active. Green – An electronic hookswitch (EHS) headset is connected and activated. Blue – A USB or Bluetooth headset is connected and activated.
Mute	Off – No call is active. Red – The phone microphone is muted.
Message Waiting Indicator (MWI)	Off – No new messages are available. Blinking Red – New or unread voicemails are available, incoming call and missed call.

# Navigating Poly CCX Business Media Phones

The phone has icons, status indicators, and user screens to help you navigate and understand important information on the state of your phone.



## CCX Phone Screens

You can access various phone screens from the **Home** screen or from the **Menu** ≡ in the upper-left corner of the display.

### Access the Home Screen

The **Home** screen on CCX series phones with Skype for Business display the icons you can select to access features, settings, and other information; additional registered lines; and favorites you can save to quickly call contacts.

#### Procedure

- » Do one of the following:
  - Select **Home** .
  - Select **Menu** ≡ > **Home** .

### Access the Dial a Number Screen

From the **Dial a Number** screen, you can also access the dialpad, **Directories**, **Recent Calls**, and **Meetings**.

Your system administrator can also configure your phone to display the **Dial a Number** screen when the phone is idle.

#### Procedure

- » Do one of the following:
  - On the **Home** screen, select **Dial a Number**.
  - Select **Menu** ≡ > **Dial a Number**.

### Accessing the Calls Screen

The **Calls** screen on CCX phones automatically displays when you place a call and you have an active call in progress.







When you have an active call in progress, the name and number of the contact you are talking with and the duration of the call displays on the **Calls** screen.

You can also view active and held calls in progress on the phone. If the phone has multiple lines, active and held calls display under the associated line.

## Icons and Status Indicators

The following table displays the icons and status indicators that display on your phone.

### Icons and Status Indicators

Icon	Description	Icon	Description
	Registered Line		Do Not Disturb enabled
	Unregistered Line		Call Forwarding enabled
	Paired device		Bluetooth

## Using a Phone as a Common Area Phone

Your system administrator can set up phones in your environment as Common Area Phones (CAP) to enable you to use the phone as a CAP user.

When your admin sets up a phone as a Common Area Phone, you can access only the following features:

- Flexible Line Keys
- Better Together over Ethernet
- Address Book Service search

## Enter Information Using the Onscreen Keyboard

The onscreen keyboard available on supported phones enables you to enter information into text fields using the touchscreen.

The onscreen keyboard displays automatically at the bottom of the screen when a text field is shown. When a text field requires only numbers, the onscreen keyboard displays only numbers.

### Procedure

1. Tap the text input field.
2. Press your finger on each character you want to enter.
3. When you finish, tap ✓.



# Logging In to and Locking Your Phone

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## Topics:

- [Signing In to Skype for Business on Poly CCX Business Media Phones](#)
- [Signing In to a Phone as a Guest User](#)
- [Locking Your Phone](#)

You can sign in to your phone with your Skype for Business credentials and lock your phone using a lock code.

## Signing In to Skype for Business on Poly CCX Business Media Phones

You can use one of the following methods to sign in to a Poly phone with your Skype for Business credentials:

- **User ID**—Enter your user credentials.
- **PIN**—Enter your PIN Authentication credentials, if enabled.
- **Web Sign In**—Sign in to your Skype for Business Online account on your computer using the web address shown on the phone.

### Sign In Using Your Skype for Business User Credentials

You can sign in to your Skype for Business account using your login credentials, which includes your domain, email, username, and password.

Your system administrator provides you with your login credentials.

#### Procedure

1. Select **Sign In**, or navigate to **Settings > Features > Skype for Business > Sign In**.
2. Select **User ID**.
3. Enter your Skype for Business account user credentials and select **Sign In**.

A confirmation message is displayed when the phone successfully signs into Skype for Business.

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**Note:** If you input the wrong credentials and lock your account, contact your system administrator.

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### Sign in to Skype for Business on Your Computer Using BToE

When your phone is connected to your computer and paired using Better Together over Ethernet (BToE), you can sign in to the phone using the Skype for Business client on your computer.

#### Procedure

1. Select **Sign In**, or navigate to **Settings > Features > Skype for Business > Sign In**.
2. Select **Via PC** or **Paired with Client**.

3. In the Skype for Business client on your computer, enter your login credentials.

A confirmation message is displayed when the phone successfully signs into Skype for Business.

## Sign In Using Your Skype for Business PIN Authentication

You can sign in to your Skype for Business account using your PIN Authentication credentials, which your system administrator provides.

### Procedure

1. Select **Sign In**, or navigate to **Settings > Features > Skype for Business > Sign In**.
2. Select **PIN Authentication**.
3. Enter your PIN Authentication credentials for your Skype for Business account, then select **Sign In**.

A confirmation message is displayed when the phone successfully signs into Skype for Business.

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**Note:** If you input the wrong credentials and lock your account, contact your system administrator.

---

## Sign in to Skype for Business Using Web Sign In

Use the Web Sign In method to sign in to a phone with your Skype for Business Online account using a web browser.

### Procedure

1. Select **Sign In**, or navigate to **Settings > Features > Skype for Business > Sign In**.
  2. Select **Web Sign In**.
- A web address displays.
3. Enter the URL into the web browser on your computer.
  4. On the Skype for Business Authentication website, enter your email address then select **Verify Email**.

5. Enter the PIN generated on the phone into the web browser.

A confirmation message is displayed when the phone successfully signs into Skype for Business.

## Set the Time and Date Format

After you sign in to your phone with your Skype for Business credentials, you have the option to set the time zone and select a time and date format.

If you choose to not set up your phone when you first sign in, you can set the time and date formats later.

### Procedure

1. After you sign in to Skype for Business on your phone, select **Next**.
2. On the Customize Time Zone screen, select your time zone and press **Next**.
3. On the Customize Time Format, choose a time format and press **Next**.
4. On the Customize Date Format screen, choose a date format and press **Next**.

## Sign Out of Skype for Business

If you are signed in to Skype for Business on a public phone, make sure you sign out of your account after you finish using it.

After you sign out of Skype for Business, you cannot call or view your Skype for Business contacts. However, you can still use other available features.

### Procedure

- » Select **Sign Out** or navigate to **Settings > Features > Skype for Business > Sign Out**.

## Signing In to a Phone as a Guest User

When your system administrator enables the hot desking feature, you can sign in to a phone as a guest user using your Skype for Business credentials or PIN.

The following features are available when you are signed in as a guest user:

- Flexible Line Key (FLK)
- Device Lock
- Address Book Service search
- Do Not Disturb status
- Call Forward
- Basic Settings menu
- Advanced Settings menu
- Sign In/ Sign Out
- System Web Interface
- Exchange Calendar
- Exchange Contacts
- Exchange Applications
- Exchange Voicemail
- Better Together over Ethernet

These features maintain the default settings while you are signed in as a guest user. When you sign out, any changes you made on the phone while signed in are removed and the host user settings are restored.

## Sign In as a Guest User Using User Credentials

You can sign into Skype for Business on your phone or common area phone as a guest user with your login credentials.

### Procedure

1. On the phone, select the **Guest** soft key.
2. Select **Yes** to sign out the host user.
3. Select **User ID**.
4. Enter your Skype for Business account user credentials and select **Sign In**.

A confirmation message is displayed when the phone successfully signs into Skype for Business.

## Sign In as a Guest User Using PIN Authentication

You can sign into Skype for Business on your phone or common area phone as a guest user with your PIN Authentication credentials.

### Procedure

1. On the phone, select the **Guest** soft key.
2. Select **Yes** to sign out the host user.
3. Select **PIN Authentication**.
4. Enter your PIN Authentication credentials for your Skype for Business account, then select **Sign In**.

A confirmation message is displayed when the phone successfully signs into Skype for Business.

## Sign In as a Guest Using Web Sign In

You can sign into your Skype for Business Online account as a guest user using the Web Sign In method, which allows you to sign into the phone with your Skype for Business Online account using a web browser.

### Procedure

1. On the phone, select the **Guest** soft key.
2. Select **Yes** to sign out the host user.
3. Select **Web Sign In**.  
A web address displays.
4. Enter the URL into the web browser on your computer.
5. On the Skype for Business Authentication website, enter your email address then select **Verify Email**.
6. Enter the PIN generated on the phone into the web browser.

A confirmation message is displayed when the phone successfully signs into Skype for Business.

## Sign Into Skype for Business as a Guest Using BToE on Your Computer

When your phone is connected to your computer and paired using Better Together over Ethernet, you can sign in to a phone as a guest user using the Skype for Business client on your computer.

### Procedure

1. On the phone, select the **Guest** soft key.
2. Select **Yes** to sign out the host user.
3. Select **Via PC** or **Paired with Client**.
4. In the Skype for Business client on your computer, enter your login credentials.

A confirmation message is displayed when the phone successfully signs into Skype for Business.

## Locking Your Phone

Your system administrator provides you with a user password that you can use to unlock the phone.

Consider locking your phone if you want to:

- Prevent unauthorized outgoing calls.
- Allow only authorized people to answer calls.
- Prevent people from viewing or modifying phone information, such as your directory, call lists, or favorites.

When your phone is locked, you can:

- Place outgoing calls to emergency and authorized numbers only.
- Place outgoing calls to a contact, unless your system administrator restricts your phone to placing calls to emergency and authorized numbers only.
- Enter a password to answer incoming calls.
- Answer incoming calls, unless your administrator has set your phone to require a password to answer calls.

When your phone is locked, a message displays on the status bar informing you that the phone is locked and that only authorized calls are allowed. Any messages that displayed before the phone was locked do not display.

## Set a Lock Code

When you sign in to your Skype for Business account, you are prompted to set a lock code. After you set a lock code, you can use the code to unlock your phone.

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**Note:** You cannot dismiss the prompt to create a lock, however, the prompt will disappear if you do not create a lock code in a set amount of time. If you do not create a lock code when prompted, you will be automatically signed out of the phone and must create a lock code the next time you sign in.

---

### Procedure

1. Create and enter a numerical lock code.
2. Confirm your lock code.

Your lock code is set and you can use your lock code to unlock your phone.

## Lock Your Phone

After you create a lock code, you can lock your phone anytime you leave your desk. Your phone automatically locks after being idle for a set amount of time, which is set by your system administrator.

### Procedure


- » Do one of the following:
  - Select the **Lock** soft key.
  - On the **Home** screen, select **Lock**.

- Go to **Settings > Advanced > Administration Settings > Device Lock** and select **Lock Now**.

## Unlock the Phone

You can use your lock code to unlock your phone.

### Procedure

- » Enter your lock code and select **Unlock** or tap .

## Change Your Lock Code

You can change your lock code at any time while signed in to your Skype for Business account.

### Procedure

1. Navigate to **Settings > Advanced > Administration Settings > Device Lock**.
2. Select **Change Lock Code** and enter your current lock code.
3. Enter a new lock code and confirm your new lock code.
4. Select **Submit**.

## Reset Your Lock Code

If you forget your lock code, you can reset the code from a phone using your login password.

### Procedure

1. On the Lock screen, select **Forgot**.
2. On the Forgot Lock Code screen, enter your login password or PIN for your Skype for Business account.
3. Enter and confirm your new lock code.

## Disable Device Lock

Device Lock is enabled by default. However, if you do not want to lock your phone, you can disable Device Lock.

### Procedure

1. Navigate to **Settings > Advanced > Administration Settings > Device Lock**.
2. Select **Device Lock: Enabled**, and select **Disabled**.

# Accessibility Features

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## Topics:

- [Features for Hearing-Impaired Users](#)
- [Features for Mobility-Impaired Users](#)
- [Features for Vision-Impaired and Blind Users](#)

Poly products include a number of features to accommodate hearing-, vision-, mobility-, or cognitively-impaired users.

## Features for Hearing-Impaired Users

Your phone includes many features that enable users with hearing impairments to use various features on the phone.

The following table lists the accessibility features for hearing-impaired users.

### Accessibility Features for Hearing-Impaired Users

Accessibility Feature	Description
Visual message indicators	An indicator light on the phone indicates that new messages are waiting. Icons on the screen also indicate that the phone has new messages.
Adjustable ring tone and volume	You can choose from a variety of ring tones for the phone. You can also change the volume of the ringer to suit your needs and choose different ring tones for contacts.
Adjustable call volume	While in a call, you can raise or lower the volume of the device.
Visual notifications	Status and icon indicators let you know when you have incoming, outgoing, active, or held calls. Indicators also alert you of the device's status and when features are enabled.
Headset memory mode	If you use a headset, you can set up your phone to use your headset for all calls.
TTY support	The phones supports commercial TTY devices such as Ultratec Superprint. Additionally, the phones provide acoustic coupled TTY support.

## Features for Mobility-Impaired Users

Your phone includes features that enable users with mobility impairments to perform various functions on the phone.

The following table lists the accessibility features for mobility-impaired users.

### Accessibility Features for Mobility-Impaired Users

Accessibility Feature	Description
Auto-answering	You can enable the phone to auto-answer calls.
Touchscreen	The large touchscreen enables you to select, swipe, and press the screen to perform functions and activate features.
Built-in speakerphone	A built-in speakerphone allows you to hear audio on the device without having to use headset.

## Features for Vision-Impaired and Blind Users

Poly phones include various features that enable users with visual impairments to use many of the features on the phone.

The following table lists the accessibility features for visually-impaired and blind users.

### Accessibility Features for Vision-Impaired and Blind Users

Accessibility Feature	Description
Adjustable backlight settings	You can change the brightness of the screen by adjusting backlight intensity settings.
Auto-answering	You can enable the phone to auto-answer calls.
Illuminated feature keys	Many feature keys illuminate when activated to alert you when a feature is enabled.



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# Calling

## Topics:

- [Audio Calls](#)
- [Conference Calls](#)
- [Shared Lines](#)
- [Call Lists and Directories](#)
- [Recording Audio Calls](#)
- [Voicemail and Pages](#)

This section provides information on placing audio calls, conference calls, using shared lines, and calling contacts from the **Directory**.

# Audio Calls

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## Topics:

- [Placing Audio Calls](#)
- [Redial a Number](#)
- [Answering Audio Calls](#)
- [Decline an Incoming Call](#)
- [End an Audio Call](#)
- [Holding and Resuming Calls](#)
- [Transferring Calls](#)
- [Rejecting Calls with Do Not Disturb](#)
- [Forwarding Incoming Skype for Business Calls](#)
- [Managing Multiple Calls](#)
- [Mute the Microphones](#)
- [Unmute the Microphone](#)

By default, your phone has one registered line. You can manage a maximum of 24 active, incoming, or held audio calls at a time on the line. However, you can have only one active call in progress with numerous other incoming calls or calls on hold.



## Placing Audio Calls

You can place calls on your phone in numerous ways, including local and international calls, calls from Recent Calls or directories, calls to contacts or favorites, or calls to authorized numbers on a locked phone.

### Place an Audio Call

You can call a contact using a number or IP address using the dialpad.

#### Procedure

1. Select **Dial a Number**.
2. Enter your contact's number, or select the onscreen keyboard  and enter an IP address.
3. Select **Dial** .


### Place an International Call

You can place calls to international phone numbers on your phone.

#### Procedure

1. On the dial pad, quickly press the **star key** \* twice.

A plus sign + is displayed.



2. Enter the phone number with the country code and select **Dial** .

The phone plays a tone and the contact's phone answers the call automatically.

## Place a Call from Recent Calls

You can place calls to contacts from the Recent Calls list, which contains calls that were recently placed, answered, or missed.

### Procedure

1. Do one of the following:
  - From the Home screen, select **Recent Calls** .
  - From the Place a Call screen, select **Recent Calls** .


2. Select a contact.

The call is placed automatically after you select a contact.

## Place Calls to Skype for Business Contacts

When you are signed into your Skype for Business account, any contacts you add as favorites in the Skype for Business client display on the phone in the **Contacts** list. You can call your Skype for Business favorites from the **Contacts** list on the phone.

### Procedure

1. Do one of the following:
  - Go to **Contacts > Contacts**.
  - Go to **Place a Call** and select **Contacts** .
2. Select a contact and select **Dial**.

## Place a Skype for Business Audio Call over USB

When you connect your phone to a computer with the Skype for Business client, you can use the phone as the audio device for your Skype for Business calls.

You can also hold, resume, and mute your audio for Skype for Business calls from the phone.

### Procedure

1. Connect the USB cable from your computer to the micro USB port on the phone.
2. In the Skype for Business client, select a contact.
3. Right-click on the contact and click **Call > Skype for Business Call**.

## Place a Call over Bluetooth

You can pair and connect your phone with a Bluetooth-enabled mobile phone or tablet to place a call on your device and use the phone as a speakerphone for the call.

### Procedure

1. Connect your device with the phone over Bluetooth.

2. On your device, place a call to a contact and select **CCX business media phone** as your audio source.

## Call a Favorite

Contacts you add as favorites display at the bottom of the Home screen with an avatar. You can place a call to favorites by selecting a favorite's avatar on the Home screen.

### Procedure

- » On the Home screen, tap a favorite.



## Calling Contacts from the Directory

You can search for and call contacts in your Contact Directory, the Corporate Directory, and the Skype for Business Directory. You can also search for distribution lists and call a member of a distribution list.

### Call a Contact from a Directory

You can place a call to a contact directly from your directory or you can select contacts in your directory to call from the Dial a Number screen.


### Procedure

1. Do one of the following:
  - Go to **Contacts** and select a directory.
  - Go to **Dial a Number**, select **Contacts** , and select a directory.
2. Select a contact.
3. From the Details screen, select **Call**  next to the number you want to call.

### Call a Contact from a Directory Search

You can search for and call contacts from the Search screen in your directory.

### Procedure

1. Select **Contacts** and select a directory.
2. In the Search field, enter your contact's name.  
Results matching your search display automatically.
3. Select a contact.
4. From the Details screen, select **Call**  next to the number you want to call.

## Place a Call from a Locked Phone

When the phone is locked, you can place outgoing calls to any contact unless your system administrator restricts your phone to placing calls only to emergency numbers, such as 911, and authorized numbers that your system administrator can set up.

### Procedure

- » From the **Place an Authorized Call** screen, select a number and select **Dial**.

## Placing Intercom Calls

The intercom feature enables you to place a call to a contact that is answered automatically on the contact's phone as long as the contact is not in an active call. Check with your system administrator to find out if this feature is available on your phone.

If the contact is in an active call, the contact can choose to answer the intercom call, or the intercom call is answered automatically after the active call ends.

### Place an Intercom Call


You can place an intercom call from your phone to quickly relay a message to a contact.

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**Tip:** Your system administrator can set up your phone to automatically call a specific contact when you select **Intercom**. If your phone is set up this way, select **Intercom** and wait for your contact to answer before speaking your message.

---


#### Procedure

1. Select **Intercom**.
2. Enter a number or select a contact.
3. Select Dial .
4. The phone plays a tone and the contact's phone answers the call automatically.
5. After the call is answered, speak your message then select **End Call**.

### Place an Intercom Call During a Call

You can place an intercom call to another contact during an active call.

#### Procedure

1. Select **Hold > Intercom**.  
The active call is placed on hold and the dialpad is displayed.
2. Enter a number or select a contact.
3. Select **Dial** .
4. The phone plays a tone and the contact's phone answers the call automatically.
5. After the call is answered, speak your message and select **End Call**.
6. Select **Resume**.

## Redial a Number

Your phone automatically keeps a record of all calls placed. You can recall the last contact you called using Redial, if enabled by your system administrator.

#### Procedure

- » Select **Redial**

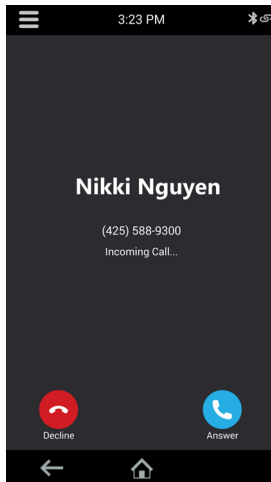
## Answering Audio Calls

When you receive an incoming call, you can choose to answer the call in various ways, including answering calls automatically, in the Incoming Calls screen, in the Calls screen, and during a call.

### Answer an Incoming Call

When you receive an incoming call, the phone rings and an Incoming Call screen is displayed. In the Incoming Call screen, you can choose to answer or reject the incoming call.

**Figure 2: Incoming Call screen**




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**Note:** Your system administrator can enable the screen to flash bright orange when you have an incoming call. The screen continues to flash until the Home or Calls screen displays the incoming call. For more information about this feature, contact your system administrator.

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#### Procedure

- » Select **Answer** .

If enabled, you can also answer calls with **Mute** buttons.

### Answer a Call When in a Call

When you're in an active call and an incoming call arrives on the same or a different line, a call waiting tone beeps, and the Incoming Call screen is displayed.

#### Procedure

- » Select **Answer**.

This places the active call on hold, and the incoming call becomes active.

## Answer Calls Automatically

You can set up your phone to automatically answer calls using the Auto Answer feature.

When enabled, the phone automatically answers all incoming calls using the speakerphone. Your system administrator sets how many times the phone rings before the call is automatically answered.

When Auto Answer is enabled and you receive an incoming call while in a call, the incoming call is not answered until you end or hold the current call.

### Procedure

1. Go to **Settings > Basic > Preferences**.
2. Select **Auto Answer**.
3. Select **Auto Answer SIP Calls** and select **Yes**.
4. Select **Microphone Muted** and choose **Yes** (the default setting) to mute the microphone for auto-answered calls.
5. Select **Save**.

## Answer a Call on a Locked Phone

When you set up your phone to accept incoming calls when it is locked, you can answer the calls by entering a user password.

### Procedure

1. On the Incoming Call screen, select **Answer**.
2. Enter your user password and select **Enter**.


The call connects.

## Answer an Intercom Call

When you receive an intercom call, the call is answered automatically using the speakerphone.

If the phone is set up to answer intercom calls with your microphone muted, you need to unmute your microphone before responding to the call.

### Procedure


- » After the call is answered, press **Mute**  and reply.

## Decline an Incoming Call

You can decline an incoming call and send the call directly to voicemail.

Declined calls display in the Missed Calls list in Recent Calls. You cannot decline calls for shared lines.




### Procedure

- » In the **Incoming Call** screen, select  **Decline**.

## End an Audio Call

You can end active calls at any time, however, you must resume held calls before you can end a call.

### Procedure

- » Do one of the following:
  - Select **Hang Up** .
  - On the Calls screen, select the call and select **Hang Up** .
  - On the Calls screen, select a held call, select **Resume**, and select **Hang Up** .


## Holding and Resuming Calls

When you are in a call, you can place an active audio call on hold and resume the call.

### Hold a Call

You can place any active call on hold.

### Procedure

- » During an active call, select **Hold**.  
If you're in the Calls screen, select the call first.  
A **Hold**  icon displays on the line of the held call, and a red LED flashes on the line key for all phones.

### Resume a Call

You can view and resume all held calls on the phone.

### Procedure

- » Do one of the following:
  - Select **Resume**.
  - From the Calls screen, select the call and select **Resume**.

## Transferring Calls

You can transfer active or held calls to another person using the following transfer types:

- Blind transfer—Transfers the call directly to another line without speaking with the other party first.
- Consultative transfer—Enables you to speak with the other party before completing the transfer.



## Choose a Default Transfer Type

You can choose a default transfer type to use for all calls on your phone.

When you choose a default transfer type, the phone uses the selected transfer type for all calls. Consultative is the default transfer type.

### Procedure

1. Go to **Settings > Basic > Preferences**.
2. Select **Default Transfer Type** and choose a transfer type.

The selected transfer type is used for all calls.

## Transfer a Call

How you transfer a call varies depending on the default transfer type.

### Procedure

- » During a call, do one of the following:
  - When the default type is Blind, select **Transfer** (↔) and dial a number or select a contact from Recent Calls or Contacts.
  - When the default type is Consultative, select **Menu** ≡ and select **Transfer** (↔). Dial a number or select a contact from Recent Calls or Contacts.

The call is transferred automatically.

## Transfer a Call using Consultative Transfer

How you transfer a call using Consultative Transfer varies depending on the default transfer type set on the phone.

### Procedure

- » During a call, do one of the following:
  - If the default type is Consultative, select **Consult** (o) and dial a number or select a contact from Recent Calls or Contacts. Select **Complete Transfer** (↔) after speaking with the contact.
  - If the default type is Blind, select **Menu** ≡ and select **Consult** (o). Dial a number or select a contact from Recent Calls or Contacts and select **Complete Transfer** (↔) after speaking with the contact.

## Cancel a Transfer

If a contact does not answer the transfer or you want to remain speaking with the contact on your line, you can cancel the transfer before it is complete.


### Procedure

- » Select **Cancel**.
- The call is not transferred and becomes active.

## Rejecting Calls with Do Not Disturb

Do Not Disturb (DND) enables you to set your phone to automatically reject calls when you don't want to be interrupted.

When you enable DND, you see the following:

- The DND icon  displays in the status bar.
- When the phone is idle, the DND icon displays next to your phone line.
- When the administrator enables hybrid line registration on the phone, you can choose **All** to enable DND on all the registered lines.
- If you have new messages or you have enabled call forwarding, the messages or forwarding icon display instead of the DND icon.

---

**Note:** When you set your presence status to Do Not Disturb and enable DND on your phone, a message stating that your status is set to Do Not Disturb scrolls under the time display, and the DND icon does not display in the status bar.

---

## Enable Do Not Disturb

You can enable DND to prevent your phone from ringing and to send all incoming calls directly to voicemail. All calls you receive while DND is enabled are logged in the Recent Calls list.

Enabling DND on shared lines disables ringing only. A visual notification of the call still displays, and you have the option to answer or ignore the call.

### Procedure

- » Do one of the following:
  - Select **DND** on the Home screen, if enabled by your system administrator.
  - Navigate to **Settings > Features > Do Not Disturb**, and select **Enable**.

## Disable Do Not Disturb

You can disable DND when you are ready to resume receiving calls again.

### Procedure

- » Go to **Settings > Features > Do Not Disturb** and select **Disable**.


## Forwarding Incoming Skype for Business Calls

You have more options for forwarding calls when your phone is registered with the Skype for Business Server; you can forward calls to contacts, voicemail, or a group of contacts.

### Simultaneously Ring a Group of Contacts

In the Skype for Business client, you can choose to simultaneously ring a group of Skype for Business contacts when you receive incoming calls.

#### Procedure

1. In the Skype for Business client, click **Settings**  and select **Tools > Call Forwarding Settings**.
2. Select **Simultaneously Ring > My Team-Call Group**.
3. In the **Call Forwarding - My Team-Call Group** dialog box, click **Add**.
4. In the **Choose a Team-Call Group Member** dialog box, select the contacts you want to add and click **OK**.

The contacts you add as group members are displayed in the **Call Forwarding - Team-Call Group** dialog box.

5. Click the **Ring your team-call group after this many seconds** drop-down menu to determine when your contacts' phones ring.

Simultaneous ringing is enabled for all assigned team-call members. If your line receives an incoming call, everyone in the team-call group's phone rings.

### Forward a Skype for Business Call to a Contact

You can set up a phone to forward all your calls to one of your Skype for Business contacts.

#### Procedure

1. Go to **Settings > Features > Forward**.
2. Select **Forward to Contact**.
3. Do one of the following:
  - Enter a contact's number and select **OK**.
  - Select **Search**, search for and select your contact, and select **Forward**.
  - Select **Contacts**, choose a contact, and select **Forward**.

A scrolling message showing that you have forwarded all incoming calls to your contact is displayed in the status bar.

### Forward a Call to Voicemail

When you are signed into Skype for Business, you have the option to forward calls directly to your voicemail.

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**Note:** The Forward to Voicemail option is available only when voicemail is enabled. If voicemail is disabled, you can't select the Forward to Voicemail option.

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## Procedure

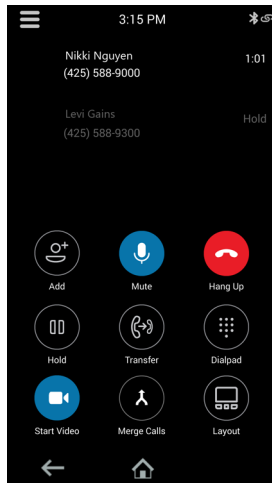
1. Go to **Settings > Features > Forward**.
2. Select **Forward to Voicemail**.  
All incoming calls are sent directly to your voicemail.

## Managing Multiple Calls

You can manage multiple calls that are active, incoming, or held on the phone.

In the Calls screen, you can view active and held calls, including conference calls. The following figure shows an active call and a held call.

**Figure 3: Multiple Calls on the Calls screen**



## Manage a Call from the Calls Screen

From the Calls screen, you can manage a call by holding, resuming, or transferring the call.




## Procedure

1. Select a call.
2. Do one of the following:
  - Select **Hold** to place an active call on hold.
  - Select **Resume** to make a held call active.
  - Select **End Call** to end a call with a contact. You can end active calls only, so resume the held call first before ending it.
  - Select **Transfer** to send the call to another contact.

## Mute the Microphones

You can mute the microphone so other parties can't hear you.




### Procedure

- » Do one of the following:
  - Select **Mute** .
  - Select the Mute key  on the phone.
  - Select the Mute key  on the microphone.

## Unmute the Microphone

Unmute your audio when you are ready to speak and let others on the call hear you.

### Procedure

- » Do one of the following:
  - Select **Unmute** .
  - Select the Mute key  on the phone.
  - Select the Mute key  on the microphone.

# Conference Calls

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## Topics:

- [Initiating a Skype for Business Conference Call](#)
- [Add Contacts to a Skype for Business Conference Call](#)
- [Send Contacts Active Conference Information](#)
- [Viewing a List of Skype for Business Conference Participants](#)
- [Managing Skype for Business Conference Participants](#)

You can initiate and manage a maximum of 24 Skype for Business conference calls on the Poly CCX Business Media Phones, however, you can have only one active conference call in progress.

You can also manage individual participants, enable announcements, and lock a conference.

## Initiating a Skype for Business Conference Call

When registered with Skype for Business, you can initiate Skype for Business conference calls on supported Poly phones.

### Initiate a Skype for Business Conference

You can initiate a Skype for Business conference call, add and invite contacts to a conference call, and manage up to 24 conference calls.

You can only select one contact at a time to add to the conference call.

#### Procedure

1. Select **Meet Now > Invite**.
2. Enter a contact's number or select a contact from Contacts or Recent Calls and select **Dial**.  
The contact is added to the call after answering.
3. Select **Invite** to add additional contacts to the conference call.

### Initiate a Conference Call during a Call

During a Skype for Business call, you can add contacts to the call to initiate a conference call.

#### Procedure

1. Select **Add** and enter a contact's number or select a contact from Contacts or Recent Calls.
2. Select **Add Participants** to add additional participants to the conference call.

## Initiate a Group Conference Call

You can initiate conference call with a group of Skype for Business contacts from a supported CCX business media phone.

### Procedure

1. Go to **Contacts > Groups**.
2. On the **Groups** screen, select a group.
3. Select **Dial All**.
4. Choose **Yes** to confirm that you want to dial all contacts in the group.

Each contact in the group is called one at a time.

## Add Contacts to a Skype for Business Conference Call

During a conference call, any participant can invite additional contacts to the call.

### Procedure

1. During a conference call, select **Invite**.
2. Select a contact to invite to the conference call.

When the contact joins the conference, a tone plays.

## Send Contacts Active Conference Information

If you are a conference participant, you can send the conference dial-in number and conference ID to contacts you want to join the call. You can view the conference contact information during an active conference call.

When a contact dials into a conference using the conference dial-in number and conference ID, the contact is added to the conference call immediately unless the conference call is locked. When the conference call is locked, the contact must wait for the conference presenter to admit them to the call.

### Procedure

- » Copy the information and send it to the contacts you want to join the conference.

## Viewing a List of Skype for Business Conference Participants

When you initiate or join a conference call, the conference participants automatically display in a conference participant list.

The list only displays participants in the conference call; it does not display any calls on hold, as shown next.

## Exit the Participants List

You can exit the Participants list to view the Home screen or navigate to menu options.

### Procedure

- » Select **Back** ← .


## Return to the Participants List

You can return to the Participants list at any time during an active conference on your phone.

### Procedure

- » Select **Participants** .

# Managing Skype for Business Conference Participants

When you initiate a conference call, you and all conference participants are listed as presenters. Conference participants with the Presenter icon  next to their name are presenters and can manage other conference participants.


As a presenter, you can manage call participants in the following ways:

- Mute all participants or individual participants.
- Remove participants from the conference call.
- Demote a presenter to an attendee or promote an attendee to presenter.
- Enable or disable conference announcements.
- Lock or unlock a conference.

These options do not display for attendees.

## Muting Conference Participants

Only presenters can mute and unmute conference participants.

If a presenter mutes your audio, a notification is displayed on your device and a Mute icon  is displayed next to each person who is muted. When a presenter mutes your audio in the Skype for Business client, it takes one second for the mute icon to display on your device.

You must wait for the presenter to unmute your audio before you can speak in the conference again.

## Mute and Unmute All Conference Participants

Presenters can mute and unmute all conference participants at one time.

### Procedure

1. Select **Mute All**.

A notification is displayed on the participants' phones informing them that the presenter has muted the audience.



2. Select **Unmute All** to enable participants to speak in the conference.

A notification is displayed on the participants' phones informing them that the presenter has unmuted the audience.

## Mute and Unmute Individual Conference Participants

Presenters can choose to mute and unmute individual participants during conferences.

### Procedure

1. Select a participant and select **Mute**.

A notification is displayed on the participant's phone informing him or her that the presenter has muted the participant.

2. Select the muted participant and select **Unmute**.

A notification is displayed on the participant's phone informing him or her that the presenter has unmuted the participant.

## Demote or Promote Conference Participants

Presenters can promote conference participants from an attendee to a presenter or demote conference participants from a presenter to an attendee.

### Procedure

- » Select a conference participant and do one of the following:

- Select **Host** to promote a participant to presenter.
- Select **Attendee** to demote a host to attendee.

The participant is now an attendee or presenter and can manage conference participants.

## Enable and Disable Conference Announcements

When enabled, announcements play whenever a host mutes or unmutes the audience, locks or unlocks the conference, removes a conference participant, or when a new person joins the conference. Presenters can choose to enable or disable announcements during a Skype for Business conference call.

### Procedure

- » During a conference call, do one of the following:

- Select **Ena.Anc** to enable announcements.
- Select **Dis.Anc** to disable announcements.

## Remove Conference Participants

A presenter can remove any participant, excluding the conference initiator, from the conference call.

### Procedure

- » Select a participant and select **Remove**.

A notification is displayed on the participant's phone informing him or her that the host has removed them from the conference.

## Lock and Unlock a Conference Call

Presenters can lock a conference call to prevent people from joining the conference call without approval.

When a conference is unlocked, anyone on the network can join a conference call automatically with the conference dial-in number and ID. When the conference is locked, a contact must wait for the main presenter, the person who initiated the conference call, to admit the contact to the meeting.

### Procedure

1. During an active conference, select **Lock**.


The conference is locked, and anyone that tries to join the call must be admitted by the main presenter.

2. When you're ready to enable people to join the conference, select **Unlock**.

The conference is unlocked, and anyone can join the conference call.

## Admit or Deny Participants to a Locked Conference Call

When you lock a conference, you can decide whether to admit or deny any new participants to the call.

Any contacts that are trying to enter a locked conference call are displayed in the conference participant list with an alert icon  on the main host's phone, as shown next.

### Procedure

- » Select the participant and do one of the following:
  - Select **Admit**.
  - Select **Deny**.

# Shared Lines

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## Topics:

- [Shared Line Limitations](#)
- [Missed and Received Calls on Shared Lines](#)
- [Hold a Call Privately on a Shared Line](#)
- [Shared Line Appearance for Skype for Business](#)
- [Boss-Admin for Skype for Business](#)

All CCX business media phone support multiple and shared lines. Your administrator can customize your phone so that you have multiple shared lines enabled.

## Shared Line Limitations

The following features are not available or have limitations on CCX business media phone with shared lines:

- Forwarding an incoming call is not available.
- Ignoring or rejecting an incoming call on shared lines disables ringing only.
- Enabling Do Not Disturb on shared lines disables ringing only and a visual notification of the call is displayed with the option to answer the call.

## Missed and Received Calls on Shared Lines

When you have an incoming call on a shared line, which none of the phones answer, the call is displayed in the Missed Calls list on all the phones. If you have an incoming call on a shared line and you or any of the other phones answer the call, the call is not logged as missed on any phone.

Your administrator can configure the phones so that if you have an incoming call on a shared line and one phone answers, the other phones log the call as a received call. That way, if another phone on a shared line answers an incoming call, you can still view the call information from your phone's call lists even if you did not answer the call.

## Hold a Call Privately on a Shared Line

You can hold a call privately on a shared line using the Private Hold feature, which places the call on hold and displays the line as busy on the other phones on the shared line.

By default, when you place a call on hold on a shared line, all of the phones registered with that line are notified of the call's held status. When the Private Hold feature is enabled, the Pvt Hold soft key is displayed, and you can hold a call privately, transfer a call, or initiate a conference call without notifying others on the shared line of the call's held state.

Check with your system administrator to find out if this feature is available on your phone.

## Procedure

- » During a call, press **More > Pvt Hold**.

The call is held on your phone, and the line shows as busy on the other shared line users' phones.

When you hold a call privately, other users on the shared line cannot resume or pick up the call. However, users on the shared line can barge in on privately held calls. In order to allow other users to resume the call, you have to publicly hold the call by pressing the Hold key or soft key.

When Private Hold is enabled, you can also transfer a call or initiate a conference call without the other shared line users being notified of the call's status. When you press the Transfer or Conference soft key on the shared line, the call is held privately. If you press Hold before you transfer a call or initiate a conference, the other users on the shared line are notified of the call's held status.

## Shared Line Appearance for Skype for Business

When your phone is registered with the Skype for Business Server, you can use the Shared Line Appearance (SLA) feature to share a single line with other contacts as a member of a group. System administrators assign members to SLA groups.

Any SLA group member can place, answer, hold, or resume calls on the line, and all group members can view the status of a call on the shared line on their phones. Each line supports up to 24 call appearances. Only one call at a time can be active on the shared line appearance. If a call is placed to a shared line with an active call in place, the incoming call is sent to another shared line.

Check with your system administrator to find out if this feature is available on your phone.

## Shared Line Appearance Limitations

The following features are not available or have limitations on lines for secondary SLA group members:

- Outgoing calls are not supported.
- Better Together is not supported.
- Conference calling is not available.
- Parking calls is not supported.

## Answering SLA Calls

An incoming call to a shared line will ring on all group members' phones simultaneously, and the call is displayed on all members' screens along with a green LED light that flashes on the line key of each members' phone.

Any group member can respond to an incoming call to the shared line. When a group member answers an incoming call, the line key's LED indicator on all phones changes to a steady red light to indicate the call was answered. Members can also view the status of a call on the shared line by pressing and holding the corresponding line key for one second. The call's status displays for five seconds.

## Resume Held SLA Calls

Any SLA member can resume a held call on the shared line.

When an active call is placed on hold on the shared line, all group members are notified of the call's new status by a flashing red LED light on the line key on all members' phones, if enabled by your system

administrator. When a held call is resumed by another SLA member, the other group members are notified of the call's new status with a steady red LED light on the line key on the members phones.

### Procedure

- » Select the corresponding line key and lift the handset.

## Boss-Admin for Skype for Business

The Boss-Admin feature enables you to manage phones on your network and see when there is an answered call, when a call is on hold, or when a call has ended on a boss or delegate line.

When your phone is registered with the Skype for Business server, you can use the Boss-Admin feature to manage shared lines. A boss can assign delegates, and delegates can manage calls on behalf of the boss's line.


### Add Delegates

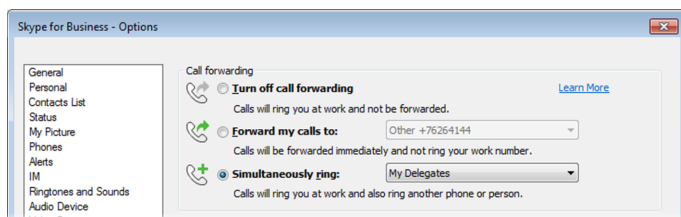
You can add delegates from your phone local interface or from the Skype for Business client.

#### Add Delegates from Skype for Business Client

You can assign up to 25 delegates to your line using your Skype for Business client; however, you cannot assign yourself as a delegate to a boss's line. You can have delegates and be a delegate for another boss's line, and you can assign your bosses as delegates for your line.

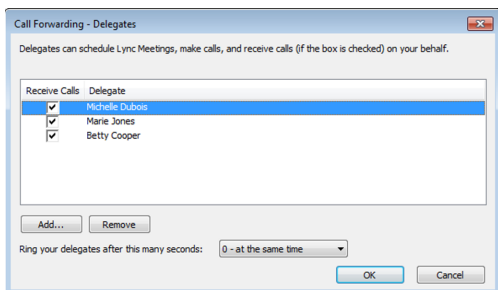
### Procedure

1. In your Skype for Business client, click **Settings**  and select **Tools > Call Forwarding Settings**.
2. Select **Simultaneously Ring > My Delegates**, as shown next.



3. In the **Call Forwarding - Delegates** dialog box, click **Add** to add contacts as delegates for your calls.
4. In the **Choose a Delegate** dialog box, select the contact you want to add as a delegate and click **Ok**.

The contacts you add as delegates display in the **Call Forwarding - Delegates** dialog box, as shown next.




5. Click **OK** when you have finished assigning contacts as delegates.

Simultaneous ringing is enabled for all assigned delegates. If the boss's line receives an incoming call, both the boss and delegate's phones ring.

You can change when your delegates' phones ring in the **Call Forwarding - Delegates** dialog box.

When you assign delegates to your line, your phone displays a notification that you have added a contact as a delegate, and a scrolling message "Simultaneous Ringing is activated" is displayed in the status bar.

When you are added as a delegate, a notification displays on your phone and in the Skype for Business client. The **Boss**  icon displays on the boss's line. The **Boss** icon changes color to reflect the boss's presence status.

## Add Delegates from Phone Local Interface

You can add delegates from the phone local interface.

### Procedure

1. From the phone home screen, navigate to **Forward > Forwarding Type Select**.
2. Tap **Edit Delegates**.
3. Tap **Add**.
4. Search for a contact of your choice in the search box and tap **Select**.

## View the Delegates Group

Your delegates are automatically added to the Delegates group on your phone and in the Skype for Business client.

### Procedure

1. Navigate to **Contacts > Groups**.
2. Select **Delegates**.

All assigned delegates are displayed in order by last name.

## Delete Delegates from Phone Local Interface

You can delete a delegate from phone local interface.

### Procedure

1. From phone home screen, navigate to **Forward > Forwarding Type Select**.
2. Tap **Edit Delegates**.
3. Select delegates you want to delete.

4. Tap **Remove**.

## Maximum Number of Boss Lines

The following table lists the maximum number of Boss lines that can be assigned to an Admin phone.

**Maximum Number of Boss Lines Assigned to an Admin Phone**

Phone Model	Maximum Bosses Assigned
Poly CCX 500 business media phones	23 of 24 lines

## View the Boss Group

You can view the contacts for which you are assigned as a delegate in the group **People I Manage Calls For** on your phone and in the **Skype for Business** client.

### Procedure

1. Navigate to **Contacts > Groups**.
2. Select **People I Manage Calls For**.

All assigned bosses are displayed in order by last name.

## Set a Ringtone for Boss Calls

As a delegate, you can set a distinct ringtone for incoming calls on each of your assigned bosses' lines.


### Procedure

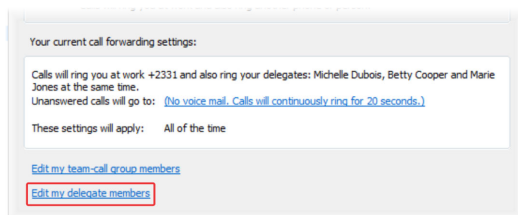
1. Navigate to **Settings > Basic > Ring Type > Boss Ring Type**.
2. Select a boss and select a ring tone.

## Edit the Delegates Group

You cannot edit the Delegates group on your phone. If you want to add or remove delegates, you need to edit the Delegates group in your **Skype for Business** client.

### Procedure

1. In your **Skype for Business** client, click **Settings**  and select **Tools > Call Forwarding Settings**.
2. Select **Edit my delegate members**, as shown next.



3. Do one of the following:

- Select **Add** to add delegates.
- Select a delegate and click **Remove** to delete the delegate from the group.

Delegates removed from the Delegates group can no longer monitor call activity on a boss's line.

## Sort Boss-Admin Lines

When a Boss assigns lines to three or more Admins or an Admin is assigned to three or more different Bosses, a **Sort** icon displays on the Boss or Admin phone. Bosses can sort Admin lines and Admins can sort Boss lines by activity and presence status.

Boss-Admin lines are sorted in the following priority order:

- Calls on hold
- Active calls
- Available
- Away
- Offline
- Status Unknown

### Procedure

1. Press the **Sort** icon.
2. Select one of the following:
  - Select **Sort** to sort lines.
  - Select **Fixed Position** to leave lines as is.

## Managing Calls on the Boss's Line

A boss can monitor calls on the delegate's line, and delegates can place, answer, hold, transfer and monitor call status, set ringtones on the Boss line, and send a call to voicemail or intercom.

### Respond to Incoming Boss Calls

When a call is placed to the boss's line, the call is displayed on the boss and delegate's phones. As a delegate, you can answer an incoming call on a boss's line, reject the call, or forward the call directly to the boss's voicemail.

If an incoming call for a boss is answered by a delegate or the boss answers the incoming call, a notification is displayed on the boss and delegate's phones.

### Procedure

- » Do one of the following:
  - Select **Answer**.
  - Select **Dismiss** or **Ignore**.
  - Select **Boss VM**.



## Viewing Call Status on the Boss's Line

A boss and delegate can both view the status of any call on the other's phone.

Bosses can see when a delegate answers or holds a call, which delegate answered the call, and the call information of the caller. Delegates can see when a boss is in an active call or has placed a call on hold. Bosses and delegates can also resume calls held on the other's line.

Bosses and delegates can both view the count of inbound calls on boss's and delegates lines. Count will be updated based on the boss's number of active calls.

The next figure displays a active call on the boss's line on an admin's CCX business media phone.



## View Held Boss Calls

Bosses and delegates can both view held calls on the boss's line.

A flashing red bar or LED light indicates that a call is on hold on a boss's line.

### Procedure

- » Press and hold the boss's line key.

## Resume Held Boss Calls

Any assigned delegate can resume held calls on the boss's line.

### Procedure

1. Press and hold the boss's line key.
2. Select the call and select **Pickup**.

## Transferring Boss Calls

After a delegate answers a delegation call, the delegate can transfer the call to the boss's phone using the Safe Transfer feature, or transfer the call directly to the boss's voicemail if the boss is unavailable.

### Transfer a Boss Call

After a delegate answers a delegation call, the delegate can transfer the call to the boss's phone using Safe Transfer, which enables the delegate to transfer the call to the boss's phone and prevent the call from going to voicemail if the boss does not answer the call.

#### Procedure

- » During a delegation call, press **More > Safe Xfer** .

The call is transferred to the boss's phone.

### Resume a Transferred Boss Call

If the boss is not available to answer the transferred call, the call is returned to the delegate's phone.

When the transferred call is returned, the phone displays a notification stating that the call was not answered and a tone plays on the delegate's phone.

After the call is returned, the delegate can resume the call and either try the Safe Transfer again or transfer the call to the boss's voicemail.

#### Procedure

- » Select the returned call and select **Resume**.

### Transfer a Call to a Boss's Voicemail

If a boss is unavailable to take calls, delegates can transfer the calls directly to the voicemail of the boss.

#### Procedure

- » During a delegation call, press **Boss VM**.

## Place a Call on Behalf of a Boss

As a delegate, you can make calls on behalf of your assigned boss on their lines.

When a call is made on the boss's line, a solid red bar is displayed on the line key on the boss's phone.

#### Procedure

1. Press and hold the boss's line key.
2. Select **On behalf**.
3. Select a contact, then select **Dial**.

The delegate and third-party phones display a notification indicating that a delegate is calling on behalf of a boss.

## Join Conference Calls for a Boss

You can join an incoming conference call on behalf of a boss on their line and add the boss to the conference call.

### Procedure

1. Press the **Conference** soft key.
2. Dial the boss's number or select the contact.
3. After the call is answered, press the **Conference** soft key.
4. After you have connected the boss's line to the conference call, press **End Call** to leave the conference call.

# Call Lists and Directories

---

## Topics:

- [Recent Calls](#)
- [Local Directory](#)
- [Local Directory Favorites](#)
- [Corporate Directory](#)
- [Skype for Business Contacts](#)

Poly phones support a Recent Calls list, a Local Directory, and a Corporate Directory. Your phone can also support a Skype for Business Directory, depending on your server and if enabled by your system administrator.

---

**Note:** The phone may not support all of the features described in this section. Check with your system administrator to find out which features are available.

---

## Recent Calls

The Recent Calls list on Poly CCX Business Media Phones includes missed, received, and placed calls. Each list holds up to 100 entries.

When the phone is registered with the Skype for Business Server, you can view the last 99 Skype for Business calls in the Recent Calls list on the phone, in the Skype for Business client on the Conversations tab, or in Microsoft® Outlook® in the Conversation History folder.

You can perform the following tasks from the Recent Calls list:

- Remove calls from the list.
- Select a call record to view call details.
- Select a call record to automatically call a contact.

## View Recent Calls

In the Recent Calls list, you can view a list of up to 100 missed, received, and placed call entries.

### Procedure


- » On the Home screen, tap **Recent Calls**.

## Edit a Recent Call Entry

You can edit a contact's phone number stored in your Recent Calls list before returning the contact's call.

### Procedure

1. Tap **Info** ⓘ next to a call entry.

2. Tap **Edit** .
3. Edit the number then select **Dial**.

## Delete a Recent Call Entry

You can delete any call entry from the Recent Calls list.

If you delete or move call entries on the phone, if enabled, the changes are made on the phone only. If you delete call entries in the Skype for Business client, the changes are made on the phone and in the Skype for Business client.


### Procedure

1. Tap **Info**  next to a call entry.
2. Select **Delete Call** .

## Delete All Recent Call Entries

You can delete all recent call entries or delete a type of call entries, such as Missed Calls.

### Procedure

1. Select **Delete** .
2. Select one of the following:
  - **All**
  - **Missed Calls**
  - **Placed Calls**
  - **Received Calls**

## Local Directory

You can add and save contacts in the phone's Local Directory, if allowed by your system administrator.

Your system administrator can set the Local Directory as read-only or require a password for access to the directory. Contact your system administrator for assistance accessing or updating the Local Directory.

## Search for a Local Directory Contact

In the Local Directory, you can enter a search criteria to find your desired contact.

### Procedure

1. Navigate to **Contacts > Local Directory**.
2. In the Search field, enter your contact's name.  
Results matching your search display automatically.

## Add a Contact to the Local Directory

When you add a contact to your Local Directory, you can choose how much information you want to enter for your contact. You are required to only enter a contact number for each new contact.

### Procedure

1. In the Local Directory, select **Add +**.
2. From the **Add Contact** screen, enter your contact's information in the available fields.
3. Select **Save**.

## View Contact Details

From your Local Directory, you can view information for any contacts saved to the directory.


### Procedure

1. Navigate to **Contacts > Local Directory**.
2. In the Local Directory, select a contact.  
The Details screen is displayed with the contact's name, number, and any additional information, such as a job title or email address.

## Update a Local Directory Contact's Information

After you add a contact to your Local Directory, you can update the contact's information.

### Procedure

1. From the Local Directory, select a contact.
2. On the Details screen, select **Edit** .
3. On the Edit Contact screen, update the contact's information.
4. Select **Save**.

## Delete a Local Directory Contact

You can delete any contact from the Local Directory.

### Procedure

1. From the Local Directory, select a contact.
2. On the Details screen, select **Delete Contact**.
3. Select **Yes** to delete the contact.

## Local Directory Favorites

Favorites are the contacts in your Local Directory that you call most often.

Contacts that you add as favorites display on the Home screen. Only three favorites display onscreen at a time, however, you can swipe the screen from right to left to display additional favorites. Favorites also display at the top of the list of contacts in the Local Directory.

## Add Favorites

You can add any contact in the local directory as a favorite.

When you add a contact as a favorite, the contact displays on the Home screen.

### Procedure

1. Navigate to **Contacts > Local Directory**.
2. Select a contact.
3. On the Details screen, select **Favorite** ★.

## Remove a Favorite

You can remove a favorite contact to make room for a new favorite.

When you remove a contact from your favorites, the contact is removed from the Home screen.

### Procedure

1. Navigate to **Contacts > Local Directory**.
2. Select a contact.
3. On the Details screen, select **Favorite** ★.

## Corporate Directory

Your system administrator can set up your phone so that you can access a Corporate Directory, which lists contacts and groups within your company.

However, you cannot update the Corporate Directory, and your system administrator determines which contacts you can see. Check with your system administrator to find out if this feature is available.

---

**Note:** You may need to enter your user credentials to access the directory for the first time, if set by your system administrator.

---

## Search the Corporate Directory

You can search for contacts in the Corporate Directory using either their first name or last name.

### Procedure

1. Navigate to **Contacts > Corporate Directory**.
2. In the search field, enter your search criteria and select **Submit**.
3. Select a contact and select **View** to view the contact's information.

## Perform an Advanced Search of the Corporate Directory

An advanced search enables you to choose to search for contacts by first name, last name, or phone number.

**Procedure**

1. Navigate to **Contacts > Corporate Directory**.
2. In the **Corporate Directory**, select **AdvFind**.
3. In the search field, enter your search criteria and select **Submit**.
4. Select a contact and select **View** to view the contact's information.

**Add Corporate Directory Contacts to the Contact Directory**

You can add contacts in the Corporate Directory to the Contact Directory.

When you save a Corporate Directory contact to the Contact Directory, the first name, last name, and phone number of the contact are automatically saved to the directory. You can add additional contact information after the contact is saved to the directory.

**Procedure**

1. In the **Corporate Directory**, search for a contact.
2. From the search results, select the contact and select **View**.
3. Select **Save**.
4. Enter any additional contact information and select **Save**.

**Skype for Business Contacts**

When you're signed into your Skype for Business account on a Poly phone, your phone displays up to 3,000 contacts and groups created in your Skype for Business client in the Contacts list.

You can view Skype for Business contacts, search for contacts, add additional contacts, call contacts, and view presence information for all Skype for Business contacts on the phone.

**Unified Contact Store**

After your administrator unifies your contacts on the Skype for Business Server, you can access and manage your contacts from any application or device you are signed into with your Skype for Business account, including a Poly phone, Skype for Business client, Outlook, or Outlook Web Application.

When the Unified Contact Store is enabled, you can add or delete contacts and distribution lists or copy and move contacts across groups. Any changes made to your contacts are synchronized across all devices and applications. For example, if you delete a contact from your phone, the contact is also deleted in the Skype for Business client.

---

**Note:** You can copy and move contacts across groups only in the Skype for Business client. Any contacts copied or moved across groups in the client are automatically updated on the phone. You cannot copy or move contacts across groups on the phone.

---



## View Skype for Business Contacts

You can view a list of up to 200 Skype for Business contacts in the Contacts list on your phone.

---

**Note:** During a network outage, the Contacts menu option does not display, and you can view only the Local Directory. If the Local Directory or another server-based directory is not enabled, a message displays indicating that only limited functionality is available during an outage when you try to access the Contacts menu.

---

### Procedure

- » From the Home screen, navigate to **Contacts > Contacts**.

## View a Skype for Business Contact's Information

You can view contact information for each of your Skype for Business contacts on supported Poly phones, and make calls directly to any of the available numbers for your contact, including directly to a contact's voicemail.

You can view the following detailed information for Skype for Business contacts, depending on the privacy relationship:

- Name
- Presence Status
- Organization
- Email address
- Work number
- Mobile number
- Home number
- Voicemail

### Procedure

1. From the Home screen, navigate to **Contacts > Contacts**.
2. From the Contacts list, select a contact.
3. Select **Menu** ≡ and select **Info**.

Your contact's presence status and information displays.

## Update a Skype for Business Contact's Information

You can update a Skype for Business contact's information from the phone, if enabled by your administrator.

### Procedure

1. From the Home screen, navigate to **Contacts > Contacts**.
2. From the Contacts list, select a contact.
3. Select **Menu** ≡ and select **Info**.

Your contact's presence status and information displays.

4. Update the contact's information.

5. Select **Save**.

## View Skype for Business Contact Groups

You can view groups created in your Skype for Business client on your phone.

### Procedure








1. From the Home screen, navigate to **Contacts > Contacts**.
2. Select **Groups**.

## Skype for Business Contact Presence Information

You can view a contact's presence information on the Home screen or in the Contacts list on your phone.

Presence information includes your contact's availability and an activity description. The following table shows the presence icons and descriptions that display for Skype for Business contacts.

### Presence Icons

Icons	Description
	Available
	Busy, In a Call, In a Meeting, In a Conference Call
	Away, Be Right Back, Inactive, Off Work
	Do Not Disturb, Presenting, In Presentation
	Offline
	Unknown
	Out of Office

## Search for Skype for Business Contacts

When the Skype for Business Address Book Service (ABS) is enabled on CCX business media phone, you can search for Skype for Business and Microsoft Outlook contacts in the Skype for Business Directory.

### Procedure

1. Navigate to **Contacts**.
2. In the Search field, enter your contact's name.  
Results matching your search display automatically.

## Add Skype for Business Contacts to the Contact List

You can search for Skype for Business contacts on the phone and add those contacts to the Contacts list. When you add a contact, you can view contact and presence information for that contact on the phone.

### Procedure

1. Navigate to **Contacts**.
2. In the Search field, enter your contact's name.  
Results matching your search display automatically.
3. Select your contact and select **Add to Contacts**.  
The contact is added to the Contact list on the phone.

# Recording Audio Calls

---

## Topics:

- [Guidelines When Recording Calls](#)
- [Record a Call](#)
- [Pause a Recording](#)
- [Resume a Recording](#)
- [Stop Recording](#)
- [Browse Recorded Calls](#)
- [Play a Recorded Call](#)
- [Pause and Resume Played Recordings](#)
- [Stop Playing a Recording](#)
- [Rename a Recording](#)
- [Delete a Recording](#)

On CCX phones, you can record audio calls onto a USB flash drive connected to your phone.

Recordings are stored as .wav files on the USB flash drive, and you can record up to four hours in one file. You can replay recordings on the phone or on a computer.

For a list of supported USB flash drives to record phone audio, see *Technical Bulletin 38084: Supported USB Devices* at [Polycom Support](#).

---

**Note:** If your phone doesn't detect the USB device when you insert it into the USB port, the USB port on your phone may be disabled. Contact your system administrator for assistance using the USB port.

---

## Guidelines When Recording Calls

Use the following guidelines when recording audio calls on your phone.

- Inform contacts when you are recording a call.
- Make sure you mute your audio when you are placed on hold while recording the call.
- During an active call, pause your recording before answering incoming calls. All incoming calls you answer after you start recording are also recorded in the same file. For example, on June 22, 2019, at 11:22 a.m., you answer a call from person A. During your call with person A, you answer calls from person B and person C. All three calls are recorded in the same file.

## Record a Call

You can record all active audio calls on the phone. Make sure to inform your contacts on the call before you begin recording.

Some things to note about recording:

- You can't record when there are no connected calls, when you place a new call to transfer a call or initiate a conference, or when you have an incoming call.
- Your phone records some tones that your contact's phone makes.
- When you mute your microphone while recording, the phone doesn't record your audio and records only the other participants' audio.

### Procedure

- » During an active call, select **Menu**  > **Start Recording** .

The recording icon displays at the top of the **Call** screen.

## Pause a Recording

During a call, you can pause a recording while the call is active.

### Procedure

- » Select **Menu** > **Pause Recording** .

The message `Recording Paused` displays in the status bar.

## Resume a Recording

After you pause and then resume recording, recording continues in the same file.

### Procedure

- » Select **Menu**  > **Resume Recording** .

## Stop Recording

You can stop recording a call before the call ends. The recording also stops when the active call ends, no matter who ended the call.

---

**Caution:** Do not remove the USB flash drive while recording. The file being recorded will be incomplete and cannot be played back later. Removing the USB flash drive while recording can also damage the flash drive.

---

### Procedure

- » Do one of the following:

- Select **Menu** ≡ > **Stop Recording** ■ .
- Select **Back** > **End Call**.

When you stop recording, the USB icon displays in the status bar.

## Browse Recorded Calls

You can browse recorded files stored on the USB flash drive connected to supported Poly CCX Business Media Phones.

### Procedure

- » Go to **Settings** > **Features** > **Removable Storage Media** > **Browse Recordings**.

A list of recordings display.

## Play a Recorded Call

You can play back calls that you recorded on a USB flash drive connected to Poly CCX Business Media Phones.

---

**Note:** You can't open and play recordings when you are in an active call or if you're recording a call. If you try to, the phone cancels the action. Place the call on hold before playing recordings. The recording stops playing when you resume the call.

---

### Procedure

1. Go to **Settings** > **Features** > **Removable Storage Media** > **Browse Recordings**.  
A list of recordings display.
2. Select a recording.
3. Select **Open** > **Play**.

The length of the recording and a progress bar is displayed as the recording plays.

## Pause and Resume Played Recordings

While playing a recording, you can pause the recording, perform another task on the phone, and resume the recording at any time.

When you receive an incoming call while playing a recording, the phone automatically pauses the recording playback. If you don't answer or reject the incoming call, the recording remains paused until you select **Resume**.

### Procedure

1. To pause the recording, select **Pause**.
2. Select **Resume** to continue playing the recording.

## Stop Playing a Recording

When you are finished listening to a recording, you can stop playing it by exiting the recording.

### Procedure

- » Select **Exit**.

## Rename a Recording

By default, recordings are labeled with the date of the recording. You can rename recordings to provide them with more meaningful names.

### Procedure

1. Go to **Settings > Features > Removable Storage Media > Browse Recordings**.  
A list of recordings display.
2. Select a recording.
3. Select **Rename**, update the file name, and select **OK**.

## Delete a Recording

When you have played a recording or need additional space on your USB drive, you can delete recordings from the phone.

### Procedure

1. Go to **Settings > Features > Removable Storage Media > Browse Recordings**.  
A list of recordings display.
2. Select a recording.
3. Select **Delete**.

# Voicemail and Pages

---

## Topics:

- [Access Skype for Business Voicemail Messages](#)
- [Managing Skype for Business Voicemail Messages](#)
- [Receiving Messages with Group Paging](#)

You can send, broadcast, and access a variety of audio messages on the phone.

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**Note:** Your phone may not support all of the features described in this section. Check with your system administrator to find out which features are available.

---

## Access Skype for Business Voicemail Messages

You can view individual voicemail messages for Skype for Business calls on CCX business media phone. For each voicemail message, you can view the contact who left the message, the contact's presence status, and the status of the voicemail message.

### Procedure

1. Select **Menu** and select **Voicemail** or navigate to **Settings > Features > Voicemail**.
2. Select a message and select **Play**.

## Managing Skype for Business Voicemail Messages

From the Skype for Business Voicemail screen, you can call a contact, delete messages, or mark messages as read.

### Call a Contact from Voicemail

After you listen to a contact's voicemail, you can call the contact from the Voicemail screen.

### Procedure

- » Select a message and select **Call**.

### Delete Voicemail Messages

After you listen to a message, you can delete the message.

### Procedure

- » Select a message and select **Delete**.



## Mark Message as Read

You can choose to mark unread messages that you do not want to listen to as read. Marking a message as read removes the message alert.

### Procedure

- » Select a message and select **Mark As Read**.

## Receiving Messages with Group Paging

You can receive pages from any paging groups you are subscribed to. By default, you are subscribed to groups 1, 24 (designated for Priority pages), and 25 (designated for Emergency pages).

How you receive a page depends on the priority of the page, whether you are in an active call, and whether the phone is set to receive a page during an active call. When you receive a page, the page is always played through the speakerphone.

Your system administrator can define up to 25 paging groups and assign a label to each group to identify the phones in the group, such as All, HR Dept, Shipping Staff, or Executives.

Each group has one of the following priorities:

- Normal—By default, broadcasts sent to groups 1 to 23 are considered Normal broadcasts. By default, all phones are configured to receive broadcasts sent to group 1.
- Priority—By default, broadcasts sent to group 24 are considered Priority broadcasts. A Priority broadcast interrupts Normal broadcasts or active calls. All phones receive Priority broadcasts unless Do Not Disturb is enabled.
- Emergency—By default, broadcasts sent to group 25 are considered Emergency broadcasts. An Emergency broadcast interrupts Normal broadcasts, Priority broadcasts, and active calls and plays out at near maximum volume even if Do Not Disturb is enabled.

When you enable Do Not Disturb, you receive only Emergency broadcasts, and non-emergency broadcasts do not play or display.

## Listen to a Page During an Active Call

How you handle a page when you are in an active call depends on the page priority and whether the phone is set up to receive a page during active calls.

The following occurs when you receive a page during a call:

- For Normal pages, the page immediately plays, and you hear audio from both the active call and the page.
- For Priority or Emergency page, the page immediately plays. You hear audio from the active call and the page.
- If the phone is not set up to receive Normal pages during active calls, the page is displayed as Pending.

---

**Note:** You adjust the volume of a Normal, non-emergency page while it plays, and the phone uses the adjusted volume for all subsequent non-emergency pages. However, only your system administrator can change the volume of an Emergency page.

---

## Procedure

- » Do one of the following:
  - For pages that play automatically during a call, hold the call to hear only the page.
  - For Pending pages, select **Accept** or hold the call.

## Receiving Pages When You're Not in an Active Call

When you receive a page and you are not in an active call, the page immediately plays, regardless of the paging priority.

While a page plays, you can:

- Hold the page.
- End the page. This ends the page at your phone only.
- Place a new call.

---

# Settings, Applications, and Accessories

## Topics:

- [Poly CCX Business Media Phones Settings](#)
- [Using BToE to Manage Calls on Your Phone and Skype for Business Client](#)
- [Using Bluetooth Devices on Poly CCX Phones](#)
- [Phone Applications](#)
- [Phone Accessories and Computer Applications](#)

This section provides information on phone settings as well as applications and accessories you can use with your phone.

# Poly CCX Business Media Phones Settings

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## Topics:

- [Password Required to Access Basic Settings](#)
- [Set the Language](#)
- [Time and Date Display](#)
- [Backlight Intensity and Timeout](#)
- [Customizing Line Keys](#)
- [Power-Saving Mode](#)
- [Changing Audio Settings](#)
- [Update Your Skype for Business Presence](#)
- [Adding a Profile Photo to Display on the Lock Screen](#)
- [Disable Hot Desking](#)
- [Clear Call Logs and Contacts](#)
- [Restrict Call Log and Contact Uploads](#)
- [Format Numbers](#)

You can make some basic customizations on the phone, which includes changing the time and date format, setting a language, and adjusting the screen brightness.

## Password Required to Access Basic Settings

Many of the features available on Poly CCX Business Media Phones can be enabled or customized from the Basic settings menu. However, if your system administrator has set up the phone to require a password to access the Basic settings menu, you cannot change settings without the permission of your system administrator. Contact your system administrator for assistance enabling or customizing features.

## Set the Language

Poly phones support several languages that you can choose to display on the phone.

Check with your system administrator to find out exactly which languages are supported on your phone.

### Procedure

1. Go to **Settings > Basic > Preferences**.
2. Select **Language** and select a language.  
The language on the phone updates immediately.

## Time and Date Display

The time and date display in the status bar. When the phone cannot obtain a time and date, the time and date display flashes. If this happens, or if the time and date are incorrect, contact your system administrator.

### Change the Time and Date Format

You can customize the time and date by choosing between a variety of time and date formats, including options to display the day, month, or year.

#### Procedure

1. Go to **Settings > Basic > Preferences**.
2. Select **Time & Date** and select one of the following:
  - Select **Clock Date** to change the date format.
  - Select **Clock Time** to change the time format.
3. From the **Clock Date**, **Clock Time**, or **Clock Order** screen, select the format you want.

### Disable the Time and Date Display

You can turn off the time and date display so that they do not display at all.

#### Procedure

1. Go to **Settings > Basic > Preferences**.
2. Select **Time & Date** and select **Disable**.

## Backlight Intensity and Timeout

You can change settings for the following backlight components:

- **Backlight Intensity**—The brightness of the screen during phone activity and inactivity.
- **Backlight Timeout**—The number of seconds the phone is inactive before the backlight dims to its Backlight Idle intensity. The backlight timeout period begins after your last activity, such as an incoming call.

Backlight Intensity includes the following settings you can choose from:

- **Backlight On**—The brightness of the screen when there is activity.
- **Backlight Idle**—The brightness of the screen when there is no activity.
- **Maximum Intensity**—The brightness scale that applies to both Backlight On and Backlight Idle intensities.

### Set the Backlight Intensity

You can change the Backlight On intensity and the Backlight Idle intensity separately. You can also choose a high, medium, or low intensity, or turn off the backlight entirely. When you change the Maximum Intensity, you modify the entire backlight intensity scale. For example, if you decrease the Maximum Intensity, the low, medium, and high levels for both Backlight On and Backlight Idle intensities decrease.

**Procedure**

1. Go to **Settings > Basic**.
2. Select **Backlight Intensity > Backlight On Intensity**.
3. Select the intensity you want, and select **Back**.
4. From the **Backlight Intensity** screen, select **Backlight Idle Intensity**.
5. Select the intensity you want, and select **Back**.
6. From the **Backlight Intensity** screen, select **Maximum Intensity**.
7. Select **Up** or **Down**, or drag your finger along the slider to increase or decrease the maximum intensity.

**Set the Backlight Timeout**

The backlight automatically turns on with any phone activity. By setting the Backlight Timeout, you can determine how long the phone should be idle before the backlight dims to its Backlight Idle intensity. By default, the backlight dims after the phone is idle for 40 seconds.

**Procedure**

1. Go to **Settings > Basic**.
2. Select **Backlight Timeout**.
3. Select the number of seconds the phone is idle before the backlight dims.

**Customizing Line Keys**

You can customize the line keys that display on the Lines screen.

- Set a transparent background to show for line keys
- Choose the number of columns that display
- Assign a contact to a line on the phone or an expansion module for up to 100 contacts
- Display only your line registration on the Lines screen
- Insert an empty line between line keys
- Clear a contact from a line key or delete a line key
- Reset all custom line keys

**Enable Line Key Customization**

When you are signed in to Skype for Business on your phone, you can enable the Line Key Customization feature and choose which contacts are assigned to which line keys on the phone.

**Procedure**

1. Go to **Settings > Features > Line Key Customization**.
2. Select **Customize Line Keys: Disabled** and select **Enabled**.

## Insert an Empty Line Key

By default, the phone inserts new or empty lines below previously added lines. If you want to place space between line keys, you can insert an empty line key above or below other line keys on the phone.

When you insert an empty line, all following line keys are moved down a line and the last contact is removed from the Lines screen.

### Procedure

1. Go to **Settings > Features > Line Key Customization**.
2. Select a line and select **Insert**.  
By default, the new line is inserted above the selected line.
3. Select **Below** to move the line below the selected line.

## Clear a Line Key

You can clear a contact from a line to make the line blank. Clearing a contact does not change the position of other contacts.

### Procedure

1. Go to **Settings > Features > Line Key Customization**.
2. Select a line and press **Clear**.

## Delete a Line Key

Instead of clearing a line key, you can delete a contact and the assigned line key. When you delete a line key, all line keys below move up one line.

When you delete a contact from the Skype for Business client on your computer, the contact is removed from the line key but the line key is not deleted from the phone.

### Procedure

1. Go to **Settings > Features > Line Key Customization**.
2. Select a line and press **Delete**.

## Reset Customized Line Keys

If you need to remove all of the customized line keys you set, you can reset the line keys on your phone.

### Procedure

1. Go to **Settings > Features > Line Key Customization**.
2. Select **Reset Customization**.

## Power-Saving Mode

By default, Poly phones are set to enter power-saving mode and turn off the screen after being idle for a certain period of time to conserve energy.

You can determine the period of time that the phone is idle before the screen turns off, and you can set different idle timeouts for office hours and off hours, such as evenings and weekends. When power-saving mode is activated, the phone exits power-saving mode if an event occurs—for example, if there is an incoming call or message. If a screen saver is enabled, power-saving mode still occurs.

You can update the following power-saving settings:

- **Office Hours**—When you start work and how long you're in the office each day.
- **Timeouts**—The period of time the phone should be idle before the screen turns off.

### Change Your Office Hours for Power-Saving Mode

When you update your office hours, you specify when you start and how long you work each day. After your work hours, the phone is idle and goes into power-saving mode.

#### Procedure

1. Go to **Settings > Basic**.
2. Select **Power Saving > Office Hours** and select **Start Hour**.
3. Select a day of the week, and using the 24-hour clock, enter a start time from 0 to 23.
4. Select **Save**.
5. From the **Office Hours** screen, select **Duration**.
6. Select a day of the week and enter a duration of 0 to 12 hours per day.
7. Select **Save**.

### Change Idle Timeouts for Power-Saving Mode

You can update the period of time the phone is idle before the screen turns off.

You can specify different timeouts for office hours (Office Hours Idle Timeout) and non-office hours (Off Hours Idle Timeout). By default, the Office Hours Idle Timeout is much longer than the Off Hours Idle Timeout.

You can also specify a separate timeout period that applies after you press a key or tap the screen (on touchscreen models). This is called the User Input Idle Timeout. You can choose to set a higher User Input Idle Timeout than the Office Hours and Off Hours Idle Timeouts so that when you're actively using the phone, power-saving mode doesn't initiate as often.

---

**Tip:** If you press a key or tap the screen (on touchscreen models), the idle timeout period that applies (User Input Idle Timeout or Office Hours/Off Hours Idle Timeout) is the timeout with the highest value.

---

#### Procedure

1. Go to **Settings > Basic**.
2. Select **Power Saving > Timeouts**.



3. Select **Office Hours Idle Timeout** and enter the number of minutes (1 to 600 minutes) the phone should wait during office hours before starting power-saving mode.
4. Select **Off Hours Idle Timeout** and enter the number of minutes (1 to 10 minutes) the phone should wait during off-hours before starting power-saving mode.
5. Select **User Input Idle Timeout** and enter the number of minutes (1 to 10 minutes) the phone should wait after a key press or screen select before starting power-saving mode.
6. Select **Save**.

## Changing Audio Settings

You control certain audio settings on your phone, including the ringtone for incoming calls from all contacts or a specific contact, where call notifications play, and the volume of the ringtone or call audio.

### Change Incoming Call Notifications

You can choose whether you hear sound effects—all phone sounds except call audio—from the handset, headset, speaker, or the active audio device you set.

For example, you can configure your phone to ring on your headset instead of the speaker. By default, you hear all sound effects from the speaker.

#### Procedure

1. Go to **Settings > Basic > Preferences**.
2. Select **Audible Ringer** and select a location to hear sound effects.

### Set a Ringtone for Incoming Calls

A simple way to personalize your phone is to change the ringtone. You can pick unique ringtones for the different lines on the phone. The default ringtone is Low Trill.


#### Procedure

1. Go to **Settings > Basic > Preferences**.
2. Select **Ring Type**.
3. From the **Ring Type** screen, select a ringtone.
4. Select **Play** to hear the ringtone.

### Set a Ringtone for Individual Contacts

To help you quickly identify callers, you can select unique ringtones for contacts in your directory.

#### Procedure

1. Navigate to **Directories > Contact Directory**.
2. From the **Contact Directory**, select a contact.
3. From the **Contact Information** screen, select **Edit** .
4. From the **Edit Contact** screen, select **Ring Type** and select a ringtone.
5. Select **Play** to hear the ringtone.
6. Select **Save**.

## Change the Volume

You can increase the volume of your ringtone and the audio during a call.

### Procedure

- » Press one of the Volume keys  to increase or decrease the audio.

## Enable Acoustic Fence

Acoustic Fence suppresses background noise while you are on a call, which enhances call audio quality for call participants.

The Acoustic Fence setting does not display on the phone by default, so if your system administrator has enabled the feature option to display on your phone, you can enable or disable Acoustic Fence.

Acoustic Fence works with handsets or headsets. However, only headsets connected to the RJ-9 port on the phone support Acoustic Fence. Acoustic Fence is enabled by default on the handset, disabled by default for a connected headset, and not supported with USB or Bluetooth headsets.

### Procedure

1. Go to **Settings > Basic > Preferences**.
2. Select **Acoustic Fence** and select **Enable**.

## Update Your Skype for Business Presence

You can update your Skype for Business presence status and presence information on the phone. When you change your presence on any device, the information is automatically updated in the Skype for Business client.

### Procedure

- » Choose your desired presence status.

You can change your status to Available from any other status by pressing **Reset Status**.

## Adding a Profile Photo to Display on the Lock Screen

If you do not have a profile photo set for your Skype for Business or Microsoft Exchange accounts, an avatar displays on the Lock screen when you lock your phone. You can add a profile photo in the Skype for Business client, and the photo will display on the phone.

For help with setting a profile photo, refer to the [Set My Picture options in Skype for Business](https://support.office.com/en-us/skype-for-business) topic on <https://support.office.com/en-us/skype-for-business>.

## Disable Hot Desking

You can disable the Hot Desking feature that enables you to sign in as a guest on a phone using your Skype for Business credentials.

The Hot Desking feature is enabled by default.

**Procedure**

1. Navigate to **Settings > Features > Hot Desking**.
2. Select **Disable**.

## Clear Call Logs and Contacts

By default, your call logs and contacts you save are stored on the phone and a server. You can clear your personal history of stored call logs and contacts from the phone.

**Procedure**

1. On the phone, go to **Settings > Basic > Clear Personal Information**.
2. Select **Yes**.

## Restrict Call Log and Contact Uploads

By default, your call logs and contacts you save are stored on the phone and uploaded to a server. You can restrict the phone from uploading your call logs and contacts to the server.

**Procedure**

1. On the phone, go to **Settings > Basic > Preferences > Restrict Personal Data Upload**.
2. Select **Enable**.

## Format Numbers

By default, the phone automatically formats phone numbers based on the amount of numbers entered. For example, 17135439078 is reformatted as +1 (713) 543-9078.

**Procedure**

1. Go to **Settings > Basic > Preferences**.
2. Select **Number Formatting**.
3. Select **Enable** or **Disable**.

# Using BToE to Manage Calls on Your Phone and Skype for Business Client

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## Topics:

- [Answer BToE Calls](#)
- [Place BToE Calls](#)
- [Pause and Resume BToE Calls](#)
- [Move Call Audio between Your Phone and Computer](#)

After you pair your phone with your computer, you can manage audio and video calls with your Skype for Business contacts on your phone and in the Skype for Business client on your computer.

Using any registered phone as your primary audio device, you can place and answer audio and video calls, hold and resume audio calls, and pause and resume video calls. You can use BToE with your phone for all Skype for Business calls even if you are not signed in to your Skype for Business account on the phone. When you connect a phone that is registered to another user to your computer, the phone acts as a speakerphone for all audio and video calls initiated in the Skype for Business client on your computer.

You can have only video call between you and one other person when BToE is enabled. Calls with three or more people are audio-only.

---

**Note:** If you want to route audio from media that uses the computer's speakers, such as web videos or media players, you must manually change the computer's default audio speaker device to use CCX business media phone.


---

## Answer BToE Calls

When you are signed in to the Skype for Business client and the connected phone with the same account, the way you answer calls is different than if the Skype for Business client and the connected phone were signed in with different accounts.

### Procedure

- » Do one of the following:
  - If signed in with the same user account, press the **Answer** soft key on your phone or click **Answer** in the Skype for Business client.
  - If signed in with different user accounts and the incoming call is for the account signed in to Skype for Business, click **Answer** in the Skype for Business client.

The call is displayed on the phone and Skype for Business client. On the phone, the PC audio icon  is displayed next to the Skype for Business call and the audio for the call is played through the phone's speakerphone.

- If signed in with different user accounts and the incoming call is for the account signed in to the phone, press the **Answer** soft key on the phone.

The call is displayed on the phone only.

## Place BToE Calls

You can place calls to Skype for Business contacts in the Skype for Business client and on your phone.

### Procedure

- » Choose a contact and select **Call**.

## Pause and Resume BToE Calls

You can pause active audio and video Skype for Business calls on your phone when you are signed in to different user accounts on your phone and the Skype for Business client. You can also pause video calls when you are signed in to the same user account on the phone and in the client. However, when you pause an audio or a video call on your phone, the call remains active in the Skype for Business client on your computer.


### Procedure

1. Select **Pause** on your phone.  
The audio or video call is paused on your phone but not in the Skype for Business client on your computer.
2. Press **Resume** on your phone.

## Move Call Audio between Your Phone and Computer

During an active Skype for Business call, you can move the call audio from your phone to your computer or from your computer to your phone.

### Procedure

1. During an active call in the Skype for Business client, click **Audio Device Settings** .
2. Click **Devices** and do one of the following:
  - Click **Handset** to move the call audio from your computer to your phone.
  - Click **PC Mic and Speakers** to move the call audio from your phone to your computer.

# Using Bluetooth Devices on Poly CCX Phones

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## Topics:

- [Using Bluetooth Headsets](#)
- [Pairing a Smartphone to Your Phone](#)
- [Disconnect and Remove Your Bluetooth Device](#)
- [Edit Your Phone's Bluetooth Device Name](#)
- [DTMF Dialing](#)
- [Play Audio from a Bluetooth Device](#)

You can pair and connect compatible Bluetooth devices such as a mobile phone, tablet, laptop, or headset with your Poly CCX phone. You can also pair and connect a Poly CCX phone with one of your own Bluetooth devices.


By default, Bluetooth is disabled on the CCX phone. After your system administrator has enabled this feature, you can discover Bluetooth devices by enabling the Bluetooth feature on the CCX phone.

You can pair and cache Bluetooth devices with the CCX phone and connect a maximum of two devices to a CCX phone at a time.

When you pair your Bluetooth headset to the CCX phone, you can use your headset to manage call audio for CCX phone calls. When you pair the CCX phone to your PC, tablet, or mobile phone, you can use the CCX phone to answer a call, end a call, or reject a call.

## Using Bluetooth Headsets

If your system administrator has enabled Bluetooth capability for your phone, you can use a Bluetooth headset to handle calls.

When a Bluetooth headset is connected and in use, the headset key  glows blue. If you have multiple types of headsets connected to your phone, the Bluetooth headset is used automatically for all calls.

This section provides you with information on how to enable Bluetooth on your CCX business media phone, how to pair and connect your Bluetooth headset, how to use your Bluetooth headset with your phones, and how to disconnect and remove your headset.

### Enable Bluetooth and Connect a Headset


To use a Bluetooth headset with your phone, you need to enable Bluetooth, pair your headset, and connect your Bluetooth device to your phone. You can pair up to five Bluetooth headsets with your phone; however, you can connect only one headset at a time.

The following instructions are intended as a guide and do not apply to all Bluetooth devices. You can usually find instructions for your headset on the device manufacturer's web site.

## Procedure

1. Navigate to **Settings > Basic > Bluetooth Settings**.

2. Select **Bluetooth** then select **On**.

The Bluetooth icon  is displayed in the status bar. After the icon displays, you can pair and connect your Bluetooth-enabled device.

3. Turn your Bluetooth device on and place the device in Discovery mode.

Refer to your Bluetooth device's documentation for information on how to place your device in discovery mode.


4. Return to **Bluetooth Settings** and select **Manage Devices**.


5. Tap **Scan** to find your Bluetooth device.

6. Select your headset in the scanned list in the **Manage Devices** screen.

7. Tap **Pair** in the **Available Devices** screen to begin the pairing process.

8. Select **Connect** to connect the paired device.



The Bluetooth Headset icon  along with a message that the device is connected displays in the **Manage Devices** screen and in the status bar of the phone.

The Bluetooth icon  along with a message that the device is connected displays in the **Manage Devices** screen and in the status bar of the phone.

After you connect a Bluetooth device to your phone, the phone automatically connects to the last connected Bluetooth device after a reboot or restart.

## Managing Calls with Your Bluetooth Headset

When your Bluetooth headset is turned on, paired, and connected with your phone, you can perform the following tasks:

- Use the headset to handle calls, including muting and adjusting the call volume.
- Initiate and end calls on your headset by pressing the Headset key , or using a control on the headset.
- Switch to handset or speakerphone mode during a headset call by picking up the handset or pressing the Speakerphone key .

When you turn the headset off, the headset is no longer connected but remains paired to your phone. When you turn the headset back on, the headset is reconnected.

## Pairing a Smartphone to Your Phone

When your system administrator has enabled Bluetooth on your phone, you can pair your phone to a Bluetooth-enabled smartphone.


After you pair a smartphone to your phone, you can use your phone to handle call controls for the smartphone, including muting the microphone and adjusting call volume.

## Enable Bluetooth and Connect a Smartphone

You can enable the Bluetooth feature and connect a smartphone to your CCX business media phone and select a smartphone to connect with in the list of available devices.

You can pair up to five smartphones with your CCX business media phone; however, you can connect only one smartphone at a time.

## Procedure

1. Navigate to **Settings > Basic > Bluetooth Settings**.
2. Select **Bluetooth** then select **On**.  
The Bluetooth icon  is displayed in the status bar. After the icon displays, you can pair and connect your Bluetooth-enabled device.
3. Turn your Bluetooth device on and place the device in Discovery mode.  
Refer to your Bluetooth device's documentation for information on how to place your device in discovery mode.
4. Return to **Bluetooth Settings** and select **Manage Devices**.
5. Tap **Scan** to find your Bluetooth device.
6. Select your smartphone in the scanned list in the **Manage Devices** screen.
7. Tap **Pair** in the **Available Devices** screen to begin the pairing process.  
A pairing request with a pairing code displays on the and the smartphone.
8. Accept the pairing request on both the CCX business media phone and smartphone.  
After the smartphone is paired with the CCX business media phone, the smartphone is displayed along with its icon on the Manage Devices screen.
9. Select **Connect** to connect the paired device.

After you connect a Bluetooth device to CCX business media phone, the phones automatically connect to the last connected Bluetooth device after a reboot or restart.

## Managing Calls with Your Smartphone

When your smartphone is paired and connected with your CCX business media phone, you can perform the following tasks:

- Use the CCX business media phone to handle calls, including muting the microphone and adjusting the call volume.  
Volume control is not specific only to the active calls but to any audio played on the CCX business media phone.
- Answer an incoming call on CCX business media phone.
- Reject the incoming call on CCX business media phone.
- End an active call on the smartphone or on CCX business media phone.

---

**Note:** If you press the volume keys to silence your ringer while receiving an incoming call on your iPhone paired with a CCX phone over Bluetooth, the phone rejects the call.

---

## Disconnect and Remove Your Bluetooth Device

You can disconnect your Bluetooth device from your phone and still keep it paired. When you disconnect a Bluetooth device, it remains paired so that you can reconnect it to your CCX business media phone.

You can also remove your Bluetooth device so that it is no longer paired or connected to the CCX business media phone. When you remove your device, it no longer displays in the Manage Devices screen. To reconnect to your Bluetooth device, you will need to scan for, add, and reconnect with the device from your CCX business media phone.



**Procedure**

1. Navigate to **Settings > Basic > Bluetooth Settings**.
2. On the **Manage Devices** screen, select the connected Bluetooth device and select **Disconnect**.

After you disconnect the device, the device icon changes and "Paired" displays next to the corresponding device on the Manage Devices screen and in the status bar of the CCX business media phone.

3. Select your device and select **Remove**.

Your device is removed from the list and is no longer paired or connected with your CCX business media phone.

---

**Tip:** You can quickly disconnect your Bluetooth device by turning off the device or turning off Bluetooth. When you turn your device back on, it is automatically reconnected to the CCX business media phone.

---

## Edit Your Phone's Bluetooth Device Name

You can change the Bluetooth device name for your CCX business media phone to identify your phone to other devices.

Bluetooth devices use the phone's default device name to identify the phone in the list of available devices, which displays as **Polycom <phone model name>** on Bluetooth devices.

**Procedure**

1. Navigate to **Settings > Basic > Bluetooth Settings**.
2. Ensure that **Bluetooth** is **On**.
3. From the **Bluetooth Settings** screen, select **Device Name**.
4. In the **Device Name** text box, enter the name you want to give for the CCX business media phone.
5. Select **Save**.

## DTMF Dialing

After the phone is successfully connected to a smartphone, you can manage call controls for the paired and connected smartphone, including entering DTMF tones.

During an active call, you can enter DTMF tones from the phone dialer to respond to computer-generated prompts during calls. For example, you can enter DTMF tones to respond to prompts during calls with customer service or technical support numbers.

## Play Audio from a Bluetooth Device

You can use your phone as a Bluetooth speaker for music or videos played on your mobile phone or tablet.

**Procedure**

1. Connect your mobile phone or tablet with the phone.

2. On your mobile phone or tablet, choose the music or video you want to hear.
3. Make sure that the phone is set as your audio device.

The audio plays through the phone's speakers.

# Phone Applications

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## Topics:

- [Using the Calendar](#)

Poly phones can support optional applications configured by your system administrator.

Ask your system administrator if your phone supports any of the applications discussed in this section.

---

**Note:** Some of the features described in this section require access to the Basic settings menu. If your phone requires a password to access the Basic settings menu, contact your system administrator for assistance.

---

## Using the Calendar

When connected to Microsoft Exchange Server, you can view and join meetings scheduled in Microsoft Outlook from your phone.

### Open the Calendar

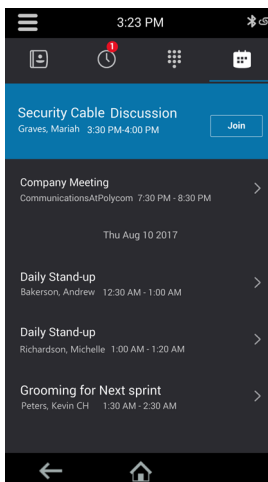
You can access the calendar on to view and join scheduled meetings.

You can view meetings for the current day and upcoming meetings. You cannot view meetings for previous days.

### Procedure

- » On the Home screen, select **Calendar**.

**Figure 4: Calendar view**



The Calendar displays scheduled meetings for the day.

## Navigate Day View

In Day view, you can see your scheduled meetings for the day, and you can navigate to a previous or upcoming day.

### Procedure

- » Do one of the following:
  - To view a meeting, use the Navigation keys to select a meeting or tap the meeting.
  - To view the previous day, select **Previous**.
  - To view an upcoming day, select **Next**.

## Display Meeting View on the Calendar

Meeting view displays the details for a chosen meeting.

From Meeting view, you can view the meeting's start and end time, location, organizer, required attendees, and meeting description; view meeting numbers that you can call to join meetings; and join meetings.

### Procedure

- » Do one of the following:
  - From **Day** view, select a meeting.
  - From **Month** view, select a date and select a meeting.

## Return to Day View

Day view is the default Calendar view. You can return to Day view from Month or Meeting view.

### Procedure

- » Select **Exit** or select **Back** < .

## Meeting Reminders

When you have a scheduled meeting on the calendar, a meeting reminder displays and an alert tone plays 5 minutes and 1 minute before a meeting starts.

From the meeting reminder, you can view meeting details and join the meeting. The following figure shows a meeting reminder that displays before a meeting starts.

---

**Note:** If you have enabled meeting reminders but the reminders do not display before meetings, make sure that your login credentials are correct.

---

## Respond to Meeting Reminders

From the meeting reminder, you can join a meeting, view meeting details, snooze the reminder to temporarily remove it from the screen, and dismiss the reminder to permanently remove it from the screen and stop all future reminders for the meeting.

### Procedure

- » Do one of the following:
  - Select **Join** to join the meeting.
  - Select **Detail** to view information for the meeting.
  - Select **Snooze** to temporarily remove the meeting reminder from your screen for one minute.
  - Select **Dismiss** to permanently remove the reminder for the meeting.

## Choose a Meeting Reminder Type

You can choose a meeting reminder type that determines if an alert tone plays each time a meeting reminder displays.

The following options are available for meeting reminders:

- **Silent**—The meeting reminder displays without an alert tone.
- **Audible Once**—An alert tone plays the first time a meeting reminder displays but does not play for any additional reminders.
- **Audible Always (default)**—An alert tone plays each time a meeting reminder displays.

### Procedure

1. Go to **Settings > Basic > Preferences**.
2. Select **Calendar Settings > Reminder Settings**.
3. Select **Reminder Type** and choose a meeting reminder type.

## Choose a Meeting Alert Tone

You can choose the alert tone that plays for meeting reminders.

### Procedure

1. Go to **Settings > Basic > Preferences**.
2. Select **Calendar Settings > Alert Tone**.
3. Choose an alert tone and select **Play** to hear the tone.

## Disable Meeting Reminders

Meeting reminders are enabled by default and display reminders for all meetings. You can choose to disable meeting reminders so they do not display for any meetings.

### Procedure

1. Go to **Settings > Basic > Preferences**.
2. Select **Calendar Settings > Reminder Settings**.
3. Select **Reminder > Disable**.

## Joining Calendar Meetings

You can join any scheduled meeting from the calendar or from a meeting reminder.

### Join Meetings from the Calendar

You can join meetings on your phone from the Calendar in Meeting view.

#### Procedure

1. From **Day** view, select the meeting.
2. In **Meeting** view, select **Join**.

### Join a Meeting from a Meeting Reminder

You can join a meeting from the meeting reminder when it displays before a meeting, if enabled.

#### Procedure

1. On the meeting reminder, select **Join**.  
The meeting details display.
2. Select **Join** to connect to the meeting.

### Join Skype for Business Meetings from the Calendar

You can join Skype for Business meetings from the Calendar either from meeting reminders or Meeting view.

#### Procedure

1. From **Day** view, select the meeting.
2. In **Meeting** view, select **Join**.

## View a Different Exchange Calendar

If enabled by your system administrator, you can access a Microsoft Outlook calendar that isn't associated with the Skype for Business user account signed into your phone.

To view scheduled meetings on another Outlook calendar, you can sign into a second Exchange Server account on the phone.

#### Procedure

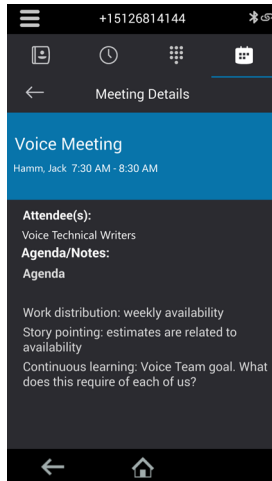
1. Select **Sign In** then select **User Credentials**, if prompted.
2. Enter your Skype for Business login credentials or extension and PIN.
3. Select **Advanced** and complete the following fields to log in to the Exchange Server account:
  - **Exchange User**
  - **Exchange Domain**
  - **Exchange Password**
4. Select **OK** then select **Sign In**.

After several minutes, the calendar information for the Exchange Server account displays on the phone in place of the Skype for Business account associated with the phone.

## View Meeting Details

When you select a meeting on the calendar, you can view the meeting's start and end time, location, organizer, invitees, and meeting description.

**Figure 5: Meeting Details**



### Procedure

- » On the calendar, select a meeting.

# Phone Accessories and Computer Applications

---

## Topics:

- [Using a Headset with Your Phone](#)
- [Connecting a Device using a USB Cable](#)

CCX business media phone support accessories and computer applications that you can use to extend your phone's capabilities.

Your phone may not support all of the accessories or applications described in this section. Check with your system administrator to find out which of these applications or accessories are available on your phone.

---

**Note:** Some of the features described in this section require access to the Basic settings menu. If your phone requires a password to access the Basic settings menu, contact your system administrator for assistance.

---

## Using a Headset with Your Phone

You can connect a headset to your phone and use the headset to place and answer calls, handle all calls using a headset, and use electronic hookswitch (EHS).

See *Feature Profile 37477: Using Headsets with Polycom Phones* on [Polycom Support](#) for a list of compatible headsets.

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**Note:** For information on your headset's features, as well as how to sync your headset with your phone, see your headset's documentation.

---

## Connecting a USB Headset

Your phone does the following when connected to analog and USB headsets:

- When an USB headset is connected and in use, the headset key glows blue.
- When both an analog and USB headset are connected, the USB headset is used automatically for all calls.
- When two USB headsets are connected, the headset you connected first is used automatically for all calls.

After you connect a headset to your phone, you can set up your phone to use the headset automatically when answering and placing calls.

For setup information on how to connect a headset to your phone, see the Setup Sheet for your phone on the [Polycom Voice Support](#) page.



---

**Note:** If your phone does not detect the USB headset when you attach it to your phone, the USB port on your phone may be disabled. Contact your system administrator.

---

## Use Your Headset for All Calls

Using the Headset Memory Mode feature, you can enable your phone so that all incoming and outgoing calls automatically use your headset.

### Procedure

1. Go to **Settings > Basic > Preferences**.
2. Select **Headset > Headset Memory Mode** and select **Enabled**.
3. Press the headset key twice.

The headset key flashes to indicate that Headset Memory Mode is now activated. All calls placed or answered on your phone use your headset automatically.

---

**Note:** If you or your contacts experience audio or echo issues during calls, such as feedback of your voice or of their own voice, you need to enable echo cancellation on your phone.

---

## Reactivate Headset Memory Mode

Switching to the speakerphone or the handset deactivates Headset Memory Mode.

### Procedure

- » Press the headset key twice.

## Using Electronic Hookswitch

When you use a headset that supports electronic hookswitch (EHS), you can place, answer, and end calls by using the controls on your headset.

To use EHS, you need a headset that includes a serial control interface in addition to the standard analog headset jack (RJ-9) interface. The serial control interface requires an EHS adapter that you can purchase from your headset manufacturer.

Headsets that support EHS include a base unit that connects to your phone. The headset connects to the base unit wirelessly, which enables you to use your headset even if you're some distance away from your phone. Typically, you can work wirelessly up to 300 feet (91 meters) from your phone and still use the EHS controls. Check with your headset's user guide for the precise range restrictions.

See *Feature Profile 37477: Using Headsets with Polycom Phones* on [Polycom Support](#) for a list of compatible headsets.

## Setting the Headset Base Unit Options

Before you connect your headset to your phone and use EHS, you need to set the following options for your specific headset model:

- For Jabra headsets, change the headset mode to **DHSG** on the headset base unit. For details, refer to your headset documentation or contact Jabra support.

- For Plantronics headsets, change the coarse receive level to **3** and the transmit level to **B** on the headset base unit. For details, refer to the guide that comes with your headset.
- For Sennheiser headsets, set the first DIP switch labeled **1** (DHSG) to the down position on the back of the headset base unit. For additional details, see your headset's documentation or contact Sennheiser support.

## Enable Electronic Hookswitch

After you set the base unit options for your headset and connect your headset to your phone, you can enable EHS.

### Procedure

1. Connect your headset and EHS adapter to your phone.  
See the Quick Start Guide for your phone on [Polycom Voice Support](#) for information on connecting a headset to your phone.
2. Go to **Settings > Basic > Preferences**.
3. Select **Headset > Hookswitch Mode**.
4. Select one of the below modes for your specific headset:
  - Choose **Jabra** if an EHS-compatible Jabra headset is attached with an EHS cable or adapter.
  - Choose **Plantronics** if an EHS-compatible Plantronics headset is attached with an EHS cable or adapter.
  - Choose **Sennheiser** if an EHS-compatible Sennheiser headset is attached with an EHS cable or adapter. If your phone does not have a menu selection for Sennheiser, select **Jabra** instead.
  - Choose **Regular Mode** (default) if another headset is attached.

## Change the Headset Mode

To control your phone using your headset, the headset must be in soft phone mode.

Headsets that come with a docking station have two modes: soft phone and desk phone mode. If you cannot operate the phone from your headset, it is possible your headset is in desk phone mode.

### Procedure

- » Press and hold the headset hookswitch until you hear a sound or message on the headset.

## Controlling Calls with Electronic Hookswitch

After you have followed the procedures for connecting your headset and enabled EHS, you can use the controls on your headset to answer, mute, and end calls. If supported on your headset, you can also place calls on hold. See your headset's user documentation for information on controlling calls from your headset.

When you are in an active call and you receive an incoming call, you cannot use the hookswitch control on your headset to place the active call on hold and answer the incoming call. Pressing the hookswitch control on the headset ends the active call and answers the incoming call. To place the existing call on hold and answer the incoming call, answer the call on your phone.

## Disconnect Your Headset

If you want to disconnect or change your headset, you need to properly detach your headset from your phone.

### Procedure

1. Go to **Settings > Basic > Preferences**.
2. Select **Headset > Hookswitch Mode**.
3. Select **Regular Mode**.
4. Remove the EHS adapter from the serial port on the back of the phone.

## Connecting a Device using a USB Cable

You can connect your computer, mobile phone, or tablet directly to the phone using a USB cable that connects to the USB port on the phone. When you connect your device to the phone, you can use it as a microphone for calls and as a speaker for audio calls or media played on your device.

When you connect a Microsoft Windows computer to the phone, you can control the volume of audio and video calls from the computer or on the phone. While connected, the call volume is synchronized on both devices.

## Minimum Hardware and Software Laptop Requirements

Before you connect your laptop to the phone, make sure your laptop meets the minimum hardware and software requirements.

### Minimum Hardware and Software Requirements for the Connected Laptop

Category	Requirement
Operating System	<ul style="list-style-type: none"> <li>• Windows 10 (32-bit or 64-bit)</li> <li>• Windows 8.1 (32-bit or 64-bit)</li> <li>• Windows 8 (32-bit or 64-bit)</li> <li>• Windows 7 (32-bit or 64-bit)</li> <li>• OS X 10.9.x (Maverick)</li> <li>• OS X 10.10.x (Yosemite)</li> <li>• OS X 10.11.x (El Capitan)</li> <li>• OS X 10.12.x (Sierra)</li> </ul>
Desktop client or application	<ul style="list-style-type: none"> <li>• Skype for Business</li> </ul>

## Connect a USB Device or Laptop

When you connect your Poly phone to a laptop or mobile device, you can use the phone as a microphone and speaker for audio and video calls, including Skype for Business calls, and to play media including music and videos.

### Procedure

- » Connect a USB cable from your computer or device to the USB port on the phone.  
Connect CCX business media phones with a Type-C USB (USB-C) cable.

## Setting Your Phone as the Audio Device

In order to use your phone to play audio from calls or media on your connected laptop, you need to set the phone as your audio communication device.

The following sections provide information on setting the phone as your audio device for your laptop and communication and collaboration clients.

### Setting the Phone as Your Audio Device for Communication Clients

When your laptop is connected to the phone, you can set the phone as your microphone and speakers for communication and collaboration clients.


Depending on the capabilities of the client, you can use the phone to accept, hold and resume, and end calls placed and received in the client. Note that the status of the calls may differ between the client and the system depending on the capabilities of the client.

### Set the Phone as Your Audio Device in RealPresence Desktop

After you connect your laptop to the phone, you can set the phone as your audio device input and output device in the RealPresence Desktop application to play audio from the meeting using the phone's speakers and use the phone as your microphone.

If you don't have the RealPresence Desktop application, download the application from the [RealPresence Desktop Support](#) page.


### Procedure

1. In RealPresence Desktop, click **Settings**  and click **Audio Device**.
2. For **Audio input device (microphone)**, select the phone you want to use from the drop-down list.
3. For **Audio output device (speakers)**, select the phone you want to use from the drop-down list.
4. Click **OK**.

### Set the Phone as Your Audio Device for Skype for Business

When your laptop is connected to the phone, you can set the phone as your microphone and speakers for Skype for Business calls you place on your laptop.

### Procedure

1. In the Skype for Business client, click **Settings**  and click **Tools > Audio Device Settings**.
2. From the drop-down list, select the phone you want to use for audio calls.

## **Set your Phone as the Default Audio Device for Your Windows Laptop**

When your Windows laptop PC is connected to the phone, you can set it as the default device for your laptop and play audio from music and videos using the phone's speakers.

### **Procedure**

1. On your laptop, click **Start > Control Panel**.
2. In the **Control Panel**, click **Hardware and Sound > Sound**.
3. Select the phone you want to use and click **Set as Default Device**.
4. Click **OK**.

Any audio from music or videos plays on the phone.

---

# Maintenance and Troubleshooting

## Topics:

- [Maintaining Poly CCX Business Media Phones](#)
- [Troubleshooting](#)

This section provides information on maintaining and troubleshooting your phone.

# Maintaining Poly CCX Business Media Phones

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## Topics:

- [Clean the Touchscreen](#)
- [Restart Your Phone](#)
- [Update the Phone's Configuration](#)
- [View Software Details](#)
- [Updating Your Skype for Business Phone Software](#)
- [Reset the Phone to Factory Defaults](#)

When the phone is not operating properly, you can investigate or troubleshoot issues along with any other tasks your administrator may ask you to perform.

## Clean the Touchscreen

The phone screens require minor maintenance, but you may need to clean the screen periodically.

Use a clean, dry, microfiber cloth—the kind you would use to clean glass surfaces—to wipe the screen. Don't use chemicals to clean the screen.

Before you clean the screen, you need to disable it so you don't activate phone functions while you wipe the touchscreen.

### Procedure

1. Go to **Settings > Basic**.
2. Select **Screen Clean**.
3. Wipe the screen with a clean, dry, microfiber cloth.

---

**Note:** If the screen is still dirty after cleaning, dampen a soft, lint-free cloth with an isopropyl alcohol and water solution of 50:50, then wipe the screen with the cloth. Always use the dampened cloth to apply the solution; never apply the solution directly to the screen because the solution could seep inside the screen or stain the phone. Do not use chemicals to clean the screen.

---

4. To enable the touchscreen, follow the on-screen instructions.

## Restart Your Phone

Your system administrator may ask you to restart the phone if it malfunctions or to assist in troubleshooting.

---

**Caution:** Before you restart the phone, contact your system administrator. If the phone is malfunctioning, you may be able to restore normal operation without restarting it. Additionally, your system administrator may want to troubleshoot the phone before you restart it. You do not need to restart the phone to update its configuration.

---

### Procedure

1. Go to **Settings > Basic**.

2. Select **Restart Phone**.

A confirmation message is displayed.

3. Select **Yes**.

The restart process begins, and the process ends when the Home screen is displayed.

## Update the Phone's Configuration

Your system administrator may ask you to update the configuration for your phone to apply any changes to the phone settings, which you can do without rebooting it.

### Procedure

1. Go to **Settings > Basic**.

2. Select **Update Configuration**.

A confirmation message displays.

3. Select **Yes**.

The configuration updates. The phone may reboot, depending on which settings you changed.

## View Software Details

You can view the details for the software version on your phone, the latest software update available for your phone, and the status of the latest update.

### Procedure

» Navigate to **Settings > Status > Software > Update**.

## Updating Your Skype for Business Phone Software

When you are signed into Skype for Business on your phone, you can update your phone with the latest UC Software from the Skype for Business server and view information for the software update.



## View Software Update Information

You can view information about the software update before you update your phone.

### Procedure

- » When prompted to update software, press **Details**.

## Update Your Skype for Business Phone Software

When a software update is available, a notification is displayed on your phone.

### Procedure

- » When prompted to update software, press **Reboot** to restart the phone and get the latest update.

## Update Skype for Business Software Later

If you do not want to update your phone software when prompted, you can choose to cancel the prompt and update the software at a later time. You can press the Dev Updt soft key at any time to update the phone's software.

If your phone is inactive for a long period of time, the phone automatically reboots and updates the phone software.

### Procedure

1. When prompted to update software, press **Cancel**.  
The **Dev Updt** soft key is displayed.
2. Press the **Dev Updt** soft key when you're ready to update your phone's software.

## Reset the Phone to Factory Defaults

You can access the phone reset option without having to enter an administrator password.

After the administrator configures this feature on the phone, you can reset the phone to factory default settings.

### Procedure

- » Go to **Settings > Basic > Reset to Factory**.

# Troubleshooting

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## Topics:

- [Phone Can't Connect to the Network or Repeatedly Restarts](#)
- [Warnings](#)
- [Test the Hardware](#)
- [Speakerphone](#)
- [USB Port](#)
- [Check the Status of the Calendar](#)
- [Troubleshoot Audio and Echo Issues](#)
- [Bluetooth Headset Issues](#)
- [Recording Issues and Solutions](#)
- [Better Together over Ethernet](#)
- [Login Credentials](#)

If you are having issues with your Poly phone, you can try the troubleshooting options and solutions in the following topics to resolve certain issues.

## Phone Can't Connect to the Network or Repeatedly Restarts

### Symptom:

Your phone has one or more of the following issues:

- The phone can't connect to the network.
- The phone doesn't start up properly or continues to restart.

### Problem:

If you connect the wrong power supply to your phone, such as the power supply for a different or older Polycom phone, you may experience problems. The wrong power supply can damage your phone, the phone doesn't work as expected, and it can void your warranty.

### Workaround:


Only use the power supply designed for your phone or check with your system administrator about using Power over Ethernet.

If you are using the correct power supply for your phone, you may need to factory reset your phone to default settings.

## Warnings

The warning icon lets you know that your phone has one or more important issues.

### Investigate Warnings

When a phone is unable to perform certain tasks, a Warning icon  displays in the status bar.

You can view details about the issues from the **Warnings** screen.

#### Procedure

1. Go to **Settings > Status > Diagnostics**.
2. Select **Warnings**.

The **Warnings** screen is displayed listing any issues.

### Remove Warnings

After you view phone warnings, you can temporarily remove the Warning icon from the status bar. However, the warning still displays in the Warnings list until the issue is fixed. The Warning icon is displayed each time your phone has a warning that you haven't viewed.

#### Procedure

- » In the **Warnings** screen, select **Clear Icon** to remove the Warning icon from the status bar.

## Test the Hardware

If your phone is having any issues, your system administrator may ask you to access a diagnostics menu on the phone to test its hardware.

You can test the display, microphones, and speaker. Contact your system administrator for instructions on how to perform these tests.

#### Procedure

1. Go to **Settings > Status > Diagnostics**.
2. Select **Test Hardware** and select one of the following:

## Speakerphone

If your speakerphone doesn't work, your system administrator may have disabled it. If this is the case, a message displays after you press the speakerphone key informing you that Handsfree mode is disabled. In this case, use the handset or a headset to handle calls.

## USB Port

If you attach a USB device to your phone, and the phone does not detect the attached USB device, your system administrator may have disabled the USB port on your phone.

In this case, you cannot attach a USB device to your phone to use the following features:

- Call recording
- Picture frame
- USB headset

Contact your system administrator for help on enabling the USB port on your phone.

## Check the Status of the Calendar

When you do not see the Calendar icon on the Home screen, or if you are not receiving meeting reminders, it is possible that the phone is not connected to the Microsoft Exchange Server.

### Procedure

1. Navigate to **Settings > Calendar**.
2. On the **Calendar** screen, select **Connect**.

## Troubleshoot Audio and Echo Issues

In some cases when you are using your headset during a call, your contacts may experience audio or echo issues, such as feedback of your voice or of their own voice. If your contacts hear an echo during a call when using your headset, enable echo cancellation on your phone.

### Procedure

1. Go to **Settings > Basic > Preferences**.
2. Select **Headset > Echo Cancellation** and select **Enabled**.

## Bluetooth Headset Issues

If you encounter any issues using a Bluetooth headset, see the following table for possible solutions to common problems.

### Common Bluetooth Headset Issues and Solutions

Issue	Corrective Action
The Bluetooth settings do not display on my phone	Do one of the following: <ul style="list-style-type: none"> <li>• Check with your system administrator to see if the Bluetooth feature is enabled on your phone.</li> <li>• Make sure the Bluetooth Radio setting is on.</li> </ul>

Issue	Corrective Action
My headset doesn't pair automatically.	If your headset is an older model, you may need to enter a password before the headset can pair with your phone. Refer to your headset documentation for more information.

## Recording Issues and Solutions

If you encounter any issues recording calls, see the following table for possible solutions to common problems.

### Common Recording Issues and Solutions

Issue	Corrective Action
The message "USB device is full. Recording canceled" is displayed when I pressed Start.	Check that there is sufficient space on the USB flash drive.
The recording stopped during a call.	If the USB flash drive becomes full during recording, recording stops and the message "USB device is full. Recording stopped" is displayed.  Delete previous recordings to make space on the USB drive.
The message "USB device removed unsafely. Recording canceled" displayed when I removed my USB flash drive during a call.	Do not remove the USB flash drive while recording. If you want to remove the drive during a call, press <b>Stop</b> , and then remove the drive.
The message "Unsupported USB device attached" displayed.	Refer to <i>Feature Profile 37477: Using Headsets with Polycom Phones</i> on <a href="#">Polycom Support</a> for a list of USB devices supported on Polycom phones.

## Better Together over Ethernet

Use the following solutions as a guide to resolve certain issues that might arise while installing the BToE Connector or pairing your devices.

### Troubleshoot the BToE Connector Installation

If the BToE Connector fails to install, download and reinstall the application from [Polycom Voice Support](#) on your computer.

If the application installation continues to fail, find the log file for the installation error and call [Polycom Technical Support](#). The technical support representative needs the log file to understand why the installation failed.

If you cannot access the log files, contact your system administrator for assistance.

### Procedure

1. Open the **Start** menu and select your user name.
2. Select the folders `AppData > Local > Temp > MSI* .LOG`.

## Troubleshoot BToE Connector Start Issues

If the BToE Connector successfully installs, but the application fails to start or you experience other application-related failures, uninstall the BToE Connector and reinstall the application.

If the application still does not start or you experience other related issues, find the log file showing the failed to start error and call [Polycom Technical Support](#). The technical support representative needs the log file to understand why the application failed to start.

If you cannot access the log files, contact your system administrator for assistance.

### Procedure

1. Open the **Start** menu and select your user name
2. Select the folders `AppData > Local > Polycom > Polycom BToE Connector`.
3. Click the file `polycom_BTOE_log.txt`.

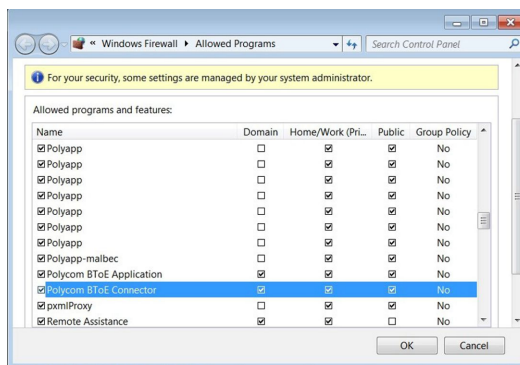
## Troubleshoot Pairing Your Phone with Your Computer

If you are having trouble pairing your phone with your computer, make sure the ethernet cable is plugged into the PC port on the phone.

If the ethernet cable is connected properly and a warning message that the phone was unable to pair continues to display, ensure that BToE Connector is an allowed program in your system's firewall on your computer.

### Procedure

1. Navigate to **Start > Control Panel > System and Security > Windows Firewall > Allow a program through Windows Firewall**.
2. Click **Change Settings**.
3. Search for **Polycom BToE Connector** in the list of applications and click the check boxes for **Domain**, **Home/Work**, and **Public** networks.



4. Click **OK**.

## Regenerate a Pairing Code for Manual BToE Pairing

If you cannot clearly read the pairing code for manually pairing your phone with your computer using Better Together over Ethernet, you can regenerate a code that is easier to read.


### Procedure

1. On the **BToE PC Pairing** screen, select **Pairing Mode**.
2. Select **Auto** then select **Manual**.

A new pairing code is generated.

## Login Credentials

If your phone has incorrect login credentials or you need to resubmit login credentials, one of the following messages or icons is displayed on your phone:

- The message “Login Credentials have failed. Please update them if the information is correct” is displayed on the screen.
- A lock icon  is displayed in the status bar.
- The message “Invalid login credentials” scrolls under the time in the status bar.
- The Calendar icon that displays on the Home screen is not available.