



SoundPoint® IP 550/560

Quick User Guide for 8x8 Virtual Office

Applies to phones running Polycom
Software 3.2.3.x.

NAVIGATION

Scrolling: or

Step in/out of menus, toggle
enabled/disabled: or

Enter/Select:

Back/Delete:



BASIC PHONE FEATURES

PLACING A CALL

Using the Handset:

Pick up the handset and dial the number. Or dial the number first, and then pick up the handset.

Using the hands-free Speakerphone:

- With the handset on-hook, press any assigned line key, or the **NewCall** softkey. Then dial the number.
- Or dial the number, then press the **Dial** soft key.

Using the optional Headset:

- With the headset connected, press any assigned line key, or the **NewCall** soft key.
- Press and dial the number. Or dial the number, and then press .

During a call, you can alternate between handset, headset, or hands-free modes by pressing the or keys, or picking up the handset.

ANSWERING A CALL

Handset: Pick up the handset.

Speakerphone: Press , or the line key, or the **Answer** soft key.

Headset (optional): Press .

*Incoming calls can be sent directly to voicemail by pressing the **Reject** soft key. The call can also be ignored by pressing . To turn off , press the button again.*

ENDING A CALL

Using the Handset:

Hang up or press the **EndCall** soft key.

Using the Speakerphone:

Press or the **EndCall** soft key.

Using the optional Headset:

Press or the **EndCall** soft key.

REDIAL

Press to redial the most recently dialed number.

LOCAL CONFERENCE CALLS

To create a three-way local conference call:

1. Call the first party.
2. Press or the **Confnc** soft key to create a new call (the active call is placed on hold).
3. Place a call to the second party.
4. When the second party answers, press or the **Confnc** soft key again to join all parties in the conference.

Conference Behavior:

- Placing the conference call on hold will place the other conference parties on hold.
- Pressing the **Split** soft key will split the conference into two separate calls on hold.

A conference may be created between an active call and a call on hold by pressing the **Join** soft key.

CONFERENCE BRIDGE

To call into a conference:

1. Find the **ConfServ** soft key by pressing the **More** soft key.
2. Follow the Conference Bridge voice prompts.

CALL TRANSFER

1. During a call, press or the **Trnsfer** soft key (the active call is placed on hold).
2. Place a call to the party to whom you want to transfer the call.
3. After speaking with the second party, press or the **Trnsfer** soft key to complete the transfer.

*Press the **Blind** soft key to transfer the call without speaking to the second party.*

*Transfer can be cancelled by pressing the **Cancel** soft key.*

CALL FORWARDING

8x8 recommends using online call forwarding instead of phone-based call forwarding so your call forwarding instructions are stored online instead of on your phone. If you set your call forwarding rules on your phone, they will not be in effect if your phone is disconnected from an Internet connection.

To enable online call forwarding (Virtual Office):

1. Log on to your Virtual Office Online dashboard at <http://virtualoffice.8x8.com>
 2. Select **Settings** then **Call Forwarding**, then select the **My Rules** tab.
 3. Update your Call Forwarding Rules and press **Save**.
- You can return to Virtual Office Online at any time to update your Call Forwarding Rules.


To enable call forwarding (phone-based):


1. Press the **Forward** soft key from the phone's idle display or press and select **Features > Forward**.
2. Select a **Forwarding Type** from **Always, No Answer, and Busy**.
3. For all types, enter a number to forward all future calls to. For **No Answer**, enter the number of rings before forwarding.
4. Press the **Enable** soft key to confirm Call Forwarding. A moving arrow icon appears for that line.
5. To disable call forwarding, perform steps 1 and 2, but select **Disable**.

DO NOT DISTURB



- Press to prevent the phone from ringing on incoming calls. A Do Not Disturb icon appears for all lines to confirm that Do Not Disturb is enabled.
- Press again to turn off Do Not Disturb.

MICROPHONE MUTE

During a call, press . Mute applies to all modes: handset, headset, and hands-free. You can hear all other parties while Mute is enabled.

To turn off Mute, press  again.

CALL HOLD AND RESUME

1. During a call, press .
2. Press  again, the **Resume** soft key, or the line key to resume the call.

LCR – LAST CALL RETURN

1. Press the **More** soft key, then the **LCR** soft key.
2. You can pick up the handset first, then press **LCR** to place the call on your handset

INTERCOM

1. Press **More** soft key, then the **InterCom** soft key.
2. Dial the number you wish to Intercom to and then press the **Enter** soft key. If you are receiving an intercom call, the phone rings, then automatically connects to your speakerphone.

AUTO ATTENDANT


To access the Auto Attendant:

1. Press the **AA** soft key. (Press the **More** soft key if the AA softkey is hidden.)
2. Follow Auto Attendant voice prompts.

CALL PARK


- During a call, press the **More** soft key, then the **Park** soft key. A recording will tell you which extension the call is parked on (your other party is placed on hold until the parked call is picked up).
- To pick up a parked call, just dial the extension the call is parked at.

CORPORATE DIRECTORY


1. Press  and select **Applications** then select **Apps Home**, then **Corporate Directory Listing**.
2. Browse up and down the directory list and select the person you wish to call (speed dial).

CORPORATE DIRECTORY SEARCH

For long directories, you can search for a user in the directory and then select their name to speed dial them.

1. Press  and select **Applications**, then **Apps Home** then **Corporate Directory Search**.
2. Input name, extension, or other data into the search field, then scroll down and select **Search**.
3. Select the matching entry to speed dial the user (or select **Back** to do a new search).

CALL LISTS

Press  followed by **Call Lists** and **Missed**, **Received**, or **Placed Calls**, as desired. Information on respective calls will be displayed. **From this screen, choose the appropriate soft key:**

1. **Edit** to amend the contact number before dialing.
2. **Dial** to place the call.


Or press **More**, then:

1. **Info** to view detailed call information.
2. **Save** to store the contact to the Contact Directory.
3. **Clear** to delete the call from the list. Press **Back** and **Exit** soft keys to return to the idle display.

VOICE MAIL

A voice mail icon on the screen, a flashing line key, and a stutter dial tone indicate one or more new voice mail messages.

To listen to voice messages:

1. Press  and then the **Connect** soft key.
2. Follow voice prompts to listen to messages.

TRANSFER CALL TO VOICEMAIL

1. During a call, select the **xferVM** soft key.
2. Enter the extension of the person you want to transfer the caller to.
3. The caller is transferred directly to the voicemail box at that extension.

CALL RECORD ON/OFF

(Virtual Office Pro users only)

Call Record On/Off is available to Virtual Office Pro users when the Call Recording feature is set to **Record Calls On Demand**.

- To turn on Call Recording during a call, press the **More** soft key to find the **CallRecrd** soft key.


You will see a **Recording is On** confirmation message on the phone screen.

- To turn Call Recording off, press the **Exit** soft key, then press the **More** softkey to find the **CallRecrd** softkey again.

Once you press the **CallRecrd** softkey, you will see a **Recording is Off** confirmation message.

CALL QUEUE IN/OUT (Call Queue Users Only)

Phones in 8x8 Call Queues can log in and out of Call Queues if the Call Queue Admin has granted log in/out permission to the user.

1. To enter or exit a Call Queue, press  and select **Applications > Apps Home** (or if you just recently used Call Queue, you can select **Apps Continue**).
2. Select **Call Queues > Log In All** to enter all your Call Queues (or **Log Out** to exit your Call Queues). If you are not a member of a Call Queue set up by your administrator, you will get a message saying you do not belong to any Call Queues.

SPEED DIALING

To assign a speed dial index, see the **CONTACT DIRECTORY** section. To dial a contact assigned to a line key, press the corresponding line key.

CUSTOMIZING YOUR PHONE

CONTACT DIRECTORY

To add a contact in your local phone directory:

1. Press **Directories**, and then select **Contact Directory**.
2. Press the **More** soft key, then the **Add** soft key to enter another contact into the phone's database.
3. Enter first and/or last name from the dial pad. Press the **1/A/a** soft key to select between numeric and upper / lower case alphanumeric modes. Press the **Encoding** soft key to access special characters in other languages if necessary.
4. Enter a unique contact phone number (not already in the directory).
5. Change the Speed Dial Index if desired. It will automatically be assigned to the next available index value.
6. Modify the remainder of the fields (Ring Type, Divert Contact, Auto Reject, and Auto Divert) if desired.
7. Press the **Save** soft key to confirm or the **Cancel** soft key to abandon the changes, then press **Directories** or the **Exit** soft keys to return to the idle display.

Contacts can be easily added from Call Lists. For more information, see **CALL LISTS** section above.


To search for a contact:

1. Press **Directories**, and then select **Contact Directory**.
2. Press the **More** soft key, and then the **Search** soft key.
3. Using the dial pad, enter the first few characters for First or Last names.
4. Press the **Search** soft key to search for contacts. Dial successful matches from the resulting search screen.

To edit a contact:

1. Press **Directories**, and then select **Contact Directory**.
2. Search for the contact (see above).
3. Press the **Edit** soft key and make the necessary changes.
4. Press the **Save** soft key to confirm or the **Cancel** soft key to abandon the changes, then press **Directories** to return to the idle display.

VOLUME ADJUSTMENT

Press the  volume keys to adjust handset, headset, and hands-free speaker volume during a call. Pressing these keys in idle state adjusts the ringer volume.

RING TYPE

You can select different rings to match your preferences and distinguish between calls on lines.

To change the incoming ring:

1. Press **Menu** then select **Settings > Basic > Ring Type**.
2. Using **▲** or **▼**, highlight the desired ring type. Press the **Play** soft key to hear the selected ring type.
3. Press the **Select** soft key to change to the selected ring type.
4. Press **Menu** to return to the idle display.

AUDIBLE RINGER

You can select the default alerting destination for incoming calls.

To change the audible ringer:

1. Press **Menu**, and then select **Settings > Basic > Preferences > Alerting Destination**.
2. Scroll to highlight the desired alerting destination for incoming calls.
3. Select the desired destination, and then press **Menu** to return to the idle screen.



DISTINCTIVE RINGING / CALL TREATMENT

You can set distinctive incoming ring tones for different contacts in your local directory.

To set a distinctive ring for a local contact:

1. Press **Directories**, and then select **Contact Directory**.
2. Search for the contact (see **CONTACT DIRECTORY** above).
3. Press the **Edit** soft key and scroll down to Ring Type.
4. Enter a number corresponding to one of the ring types available (see **RING TYPE** section).
5. Press the **Save** soft key or the **Cancel** soft key to abandon the change, then press **Directories** to return to the idle display.


HEADSET MEMORY MODE

For frequent headset users, there is an option to default all calls to the headset.

To enable Headset Memory Mode:

1. Press **Menu** and select **Settings > Basic > Preferences > Headset > Headset Memory**.
2. Use the **Up** or **Down** arrow keys and press the **Select** soft key to enable Headset Memory Mode.

To disable Headset Memory Mode: Repeat steps 1 and 2 and select **Disabled**.

To activate Headset Memory Mode: Press  twice.