



Polycom VVX 201
User Guide

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Installation

Desk Setup

1. Connect the Polycom VVX 201 as shown in the diagram below.

NOTE: Depending on your preference, it may be easier to attach the stand to the phone first (see step 2 below), and then connect the headset, Ethernet cables, and AC adapter (*Figure 1-1*).

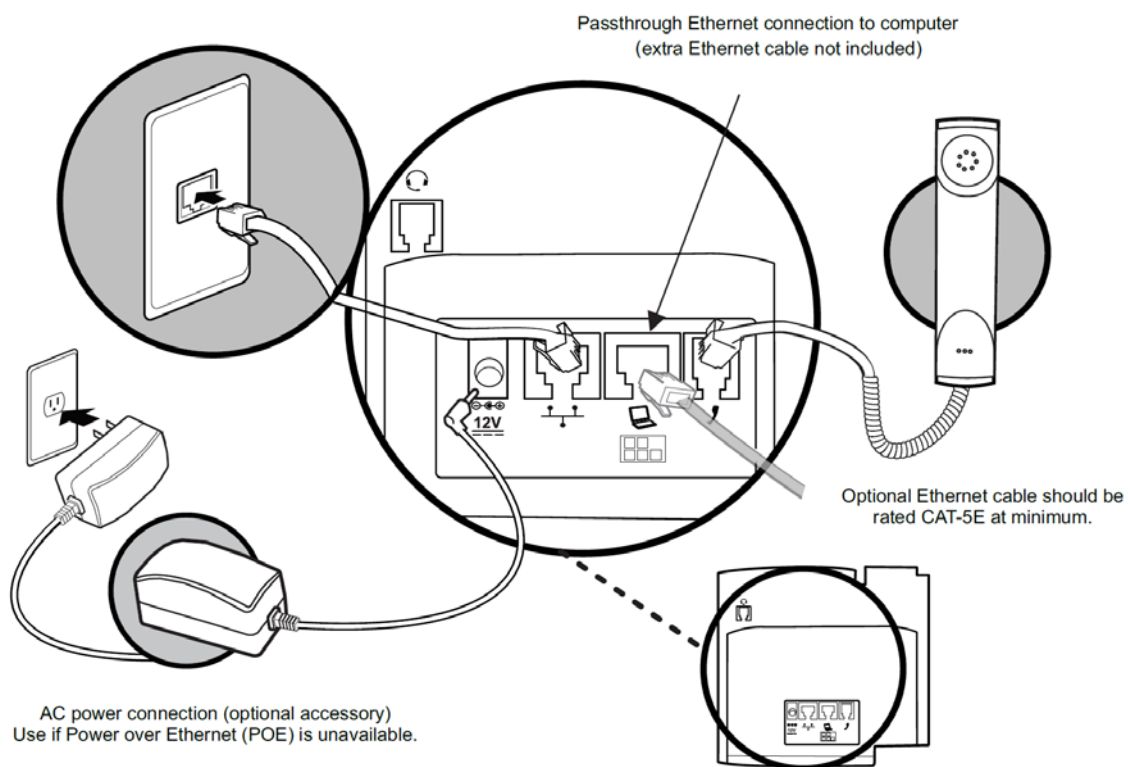


Figure 1-1: Attaching the Cables

2. Connect the stand to the phone as shown in the diagram in *Figure 1-2*.

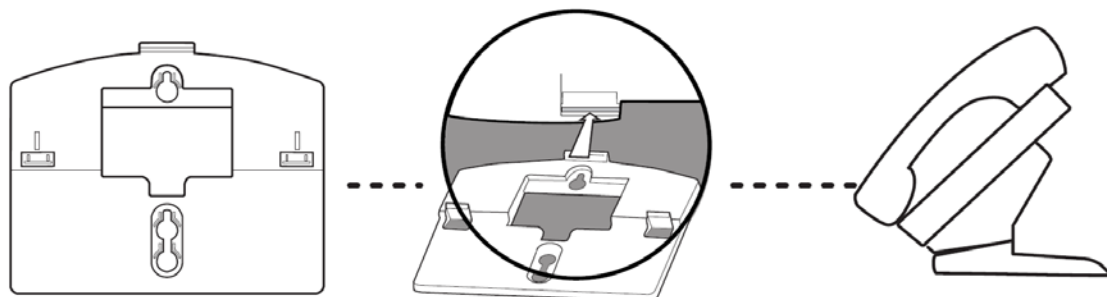


Figure 1-2: Attaching the Stand

3. If using an optional headset, follow the diagram in *Figure 1-3* to connect the headset.

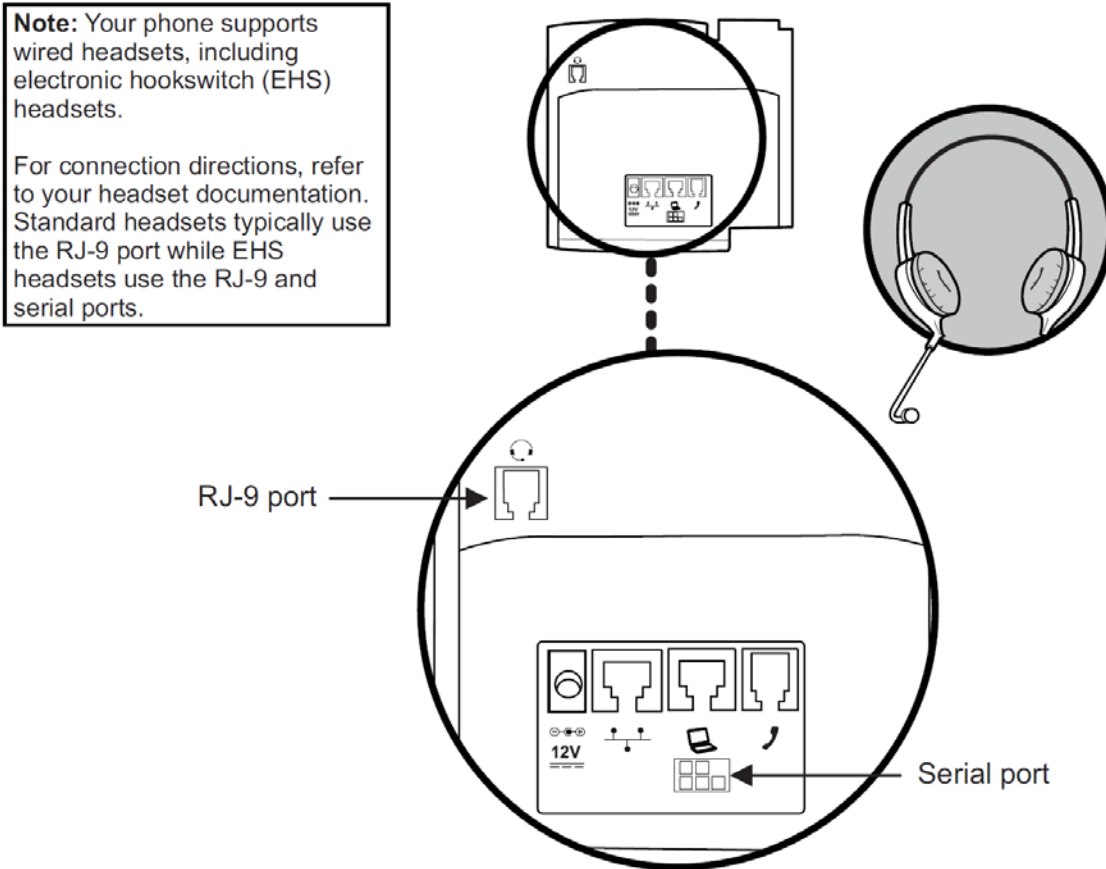


Figure 1-3: Optional Headset Attachment

Wall Mounting

Follow the diagram below to mount the Polycom VVX 201 to a wall (*Figure 1-4*).

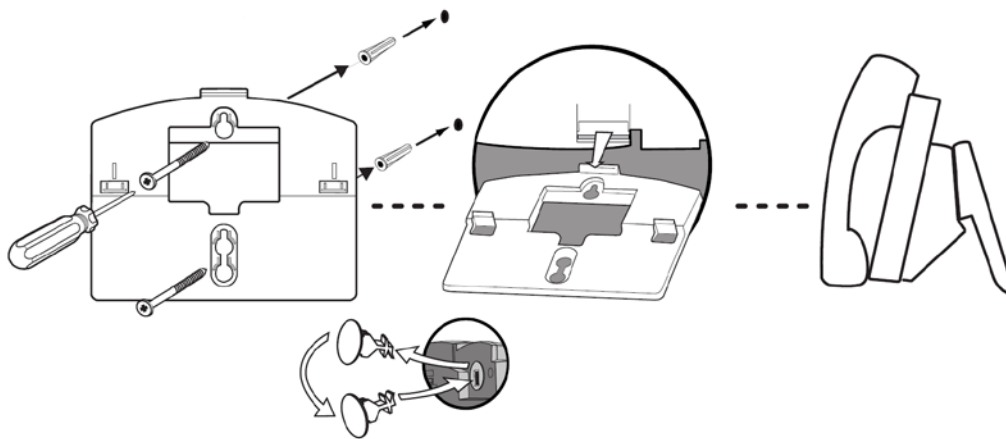


Figure 1-4: Mounting to the wall

Location of Controls

The features of the Polycom VVX 201 phone are shown below (*Figure 2-1*).

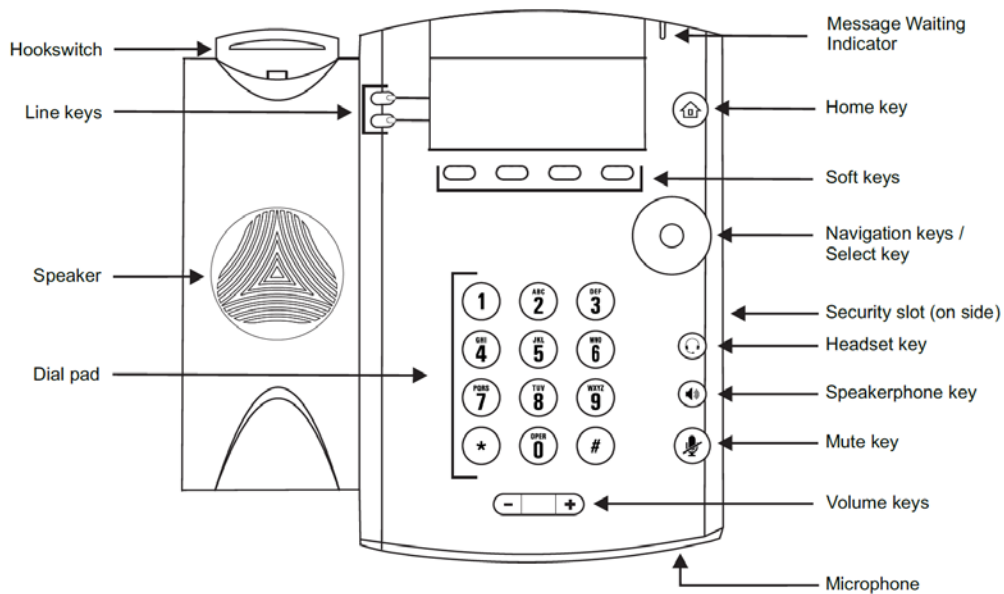


Figure 2-1: Phone Layout

Provisioning Instructions

Before you can make calls with the Polycom VVX 201, it must be added to your Nextiva account, assigned to a user, and provisioned. Follow the instructions below to complete these tasks.

Using the NextOS 3.0 Beta Portal

1. For Administrators, log in to the NextOS Beta 3.0 portal by visiting www.nextiva.com and clicking on the customer Login found at the top right.
2. Log in to the NextOS 3.0 Beta portal with your login credentials.
3. From the main dashboard, click **Manage** in the **Users** tile (*Figure 3-1*).

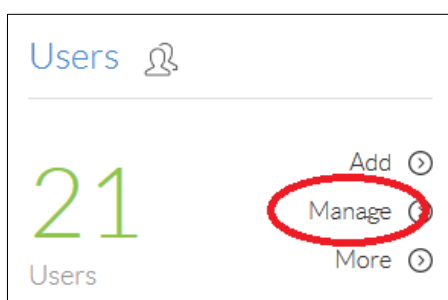


Figure 3-1: Users Tile

4. Hover your cursor over the user to whom you are assigning the device, and click the **pencil icon** that appears to the right of their name (*Figure 3-2*).

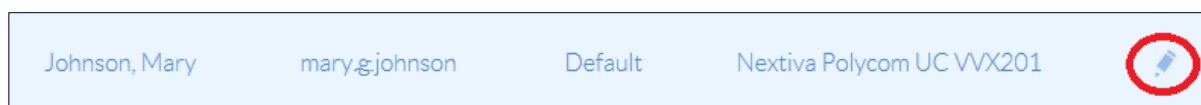
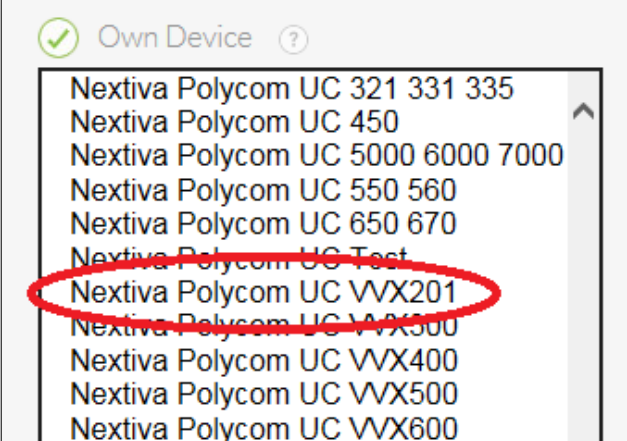


Figure 3-2: User Edit

5. Scroll down, and click the **Devices** section.
6. Select the **Own Device** radio button.

7. Select the Polycom VVX 201 phone from the drop-down list below the **Own Device** radio button (Figure 3-3).

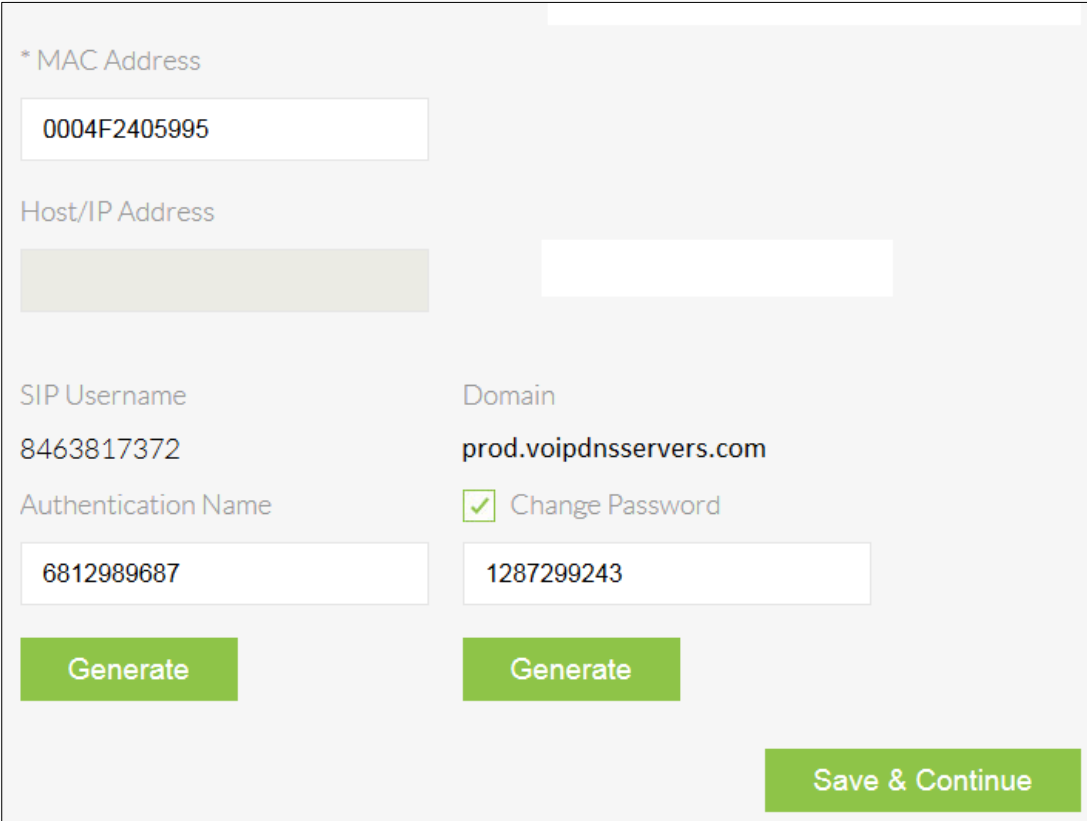


Own Device ?

- Nextiva Polycom UC 321 331 335
- Nextiva Polycom UC 450
- Nextiva Polycom UC 5000 6000 7000
- Nextiva Polycom UC 550 560
- Nextiva Polycom UC 650 670
- Nextiva Polycom UC Test
- Nextiva Polycom UC VVX201
- Nextiva Polycom UC VVX300
- Nextiva Polycom UC VVX400
- Nextiva Polycom UC VVX500
- Nextiva Polycom UC VVX600

Figure 3-3: Selecting the Make and Model

8. Enter the MAC address in the **MAC Address** text box (Figure 3-4).
9. Click the green **Generate** button under both the Authentication Name and Authentication Password text boxes.



* MAC Address

0004F2405995

Host/IP Address

SIP Username: 8463817372

Domain: prod.voipdnsservers.com

Authentication Name: 6812989687

Change Password

1287299243

Generate Generate

Save & Continue

Figure 3-4: Generating Authentication Details

10. Click **Save & Continue**. A pop-up message appears confirming that the transaction has been processed (*Figure 3-5*).

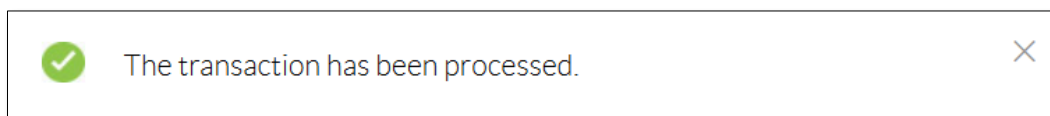


Figure 3-5: Confirmation Message

Entering the Provisioning Server

If the Polycom VVX 201 phone was purchased from Nextiva, then the phone will arrive with the provisioning address already programmed into the phone. If the phone was purchased from a third party, or if the phone required a factory reset, you will need to manually enter the provisioning address into the phone. Follow the instructions below to do this.

From the Phone's Menu:

1. Press the **Home** button on the right side of the phone.
2. Select **Settings** → **Advanced...** from the menu.
3. Enter **456** as the password, and press the **Enter** softkey at the bottom of the screen (*Figure 3-6*).



Figure 3-6: Enter Password

NOTE: If the phone does not accept 456 as the password, you will need to contact the provider with whom this phone last had service to obtain the password, or factory reset the phone using the instructions found later in this guide.

4. Select **Admin Settings...** → **Network Config...** → **Provisioning Server...** from the menu. You will know if you are on the correct screen because the top option on the Provisioning Server menu says DHCP Menu (Figure 3-7).



Figure 3-7: Provisioning Server Menu

5. Select the **Server Type** field to edit it, and then select **HTTP** (Figure 3-8).



Figure 3-8: Server Type

6. Select the **Sever Addr** field to edit it, and enter **dc.nextiva.com/ucvvx201/** as the server address. Press the **OK** softkey at the bottom of the screen when you are done typing (Figure 3-9).



Figure 3-9: Server Address

NOTE: To enter a period (.), press the * key once. To enter a forward slash (/), press the # key once (Figure 3-10).

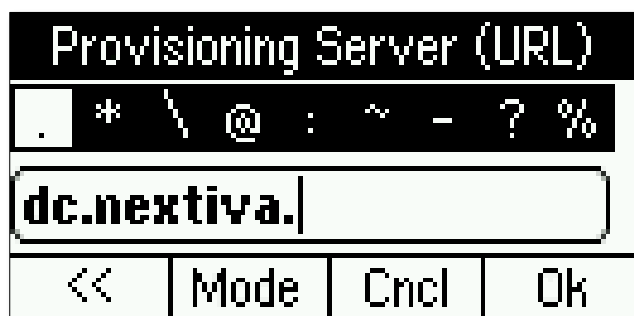


Figure 3-10: Special Characters

7. Press the **Back** softkey at the bottom of the screen, and scroll down using the directional pad until you see **Tag SN to UA**.
8. Set this option to **Enabled** (Figure 3-11).

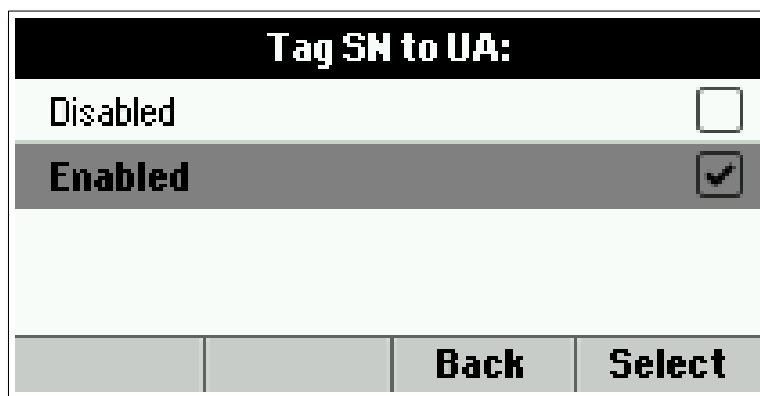


Figure 3-11: Enable Tag SN to UA

9. Press the **Back** softkey twice until the **Save Config** option appears on the screen.
10. Press the **Sel** softkey at the bottom of the screen to save the configuration. The phone will reboot, provision and register (Figure 3-12).

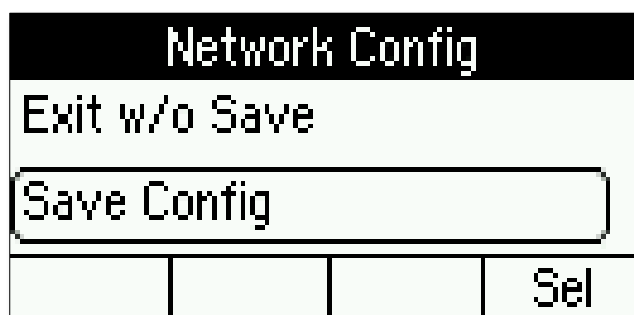


Figure 3-12: Save Config

To determine if the phone is registered (which is necessary to make and receive calls), examine the phone screen. It should display the extension on the left side of the screen, along with a check mark (Figure 3-13).



Figure 3-13: Active Line

From the Phone's Web Configuration Portal:

1. Press and hold the **1**, **4**, and **7** keys on the phone. The phone's IP address and MAC address display on the screen (Figure 3-14).



Figure 3-14: Phone Details

2. Enter the IP address into the address bar of your **web browser**. For best results, use either Google Chrome® or Mozilla Firefox® (Figure 3-15).

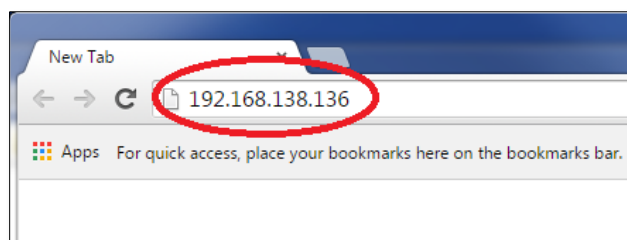


Figure 3-15: Navigate to the IP Address

NOTE: If you are unable to access the phone using the IP address, the Web Configuration Utility may be disabled. Follow the instructions in the “Enabling the Web Configuration Utility” section to enable this.

3. Make sure that **Admin** is selected as the login type, and enter **456** as the password (Figure 3-16).

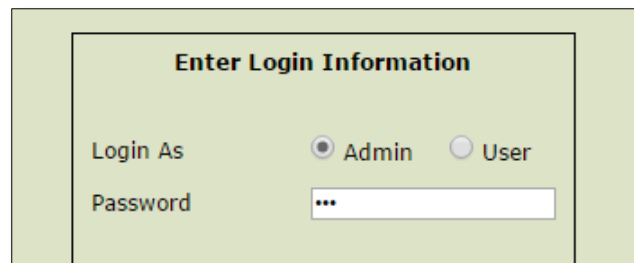


Figure 3-16: Log in to the Phone's Interface

4. Click the **Submit** button at the bottom of the screen (Figure 3-17).

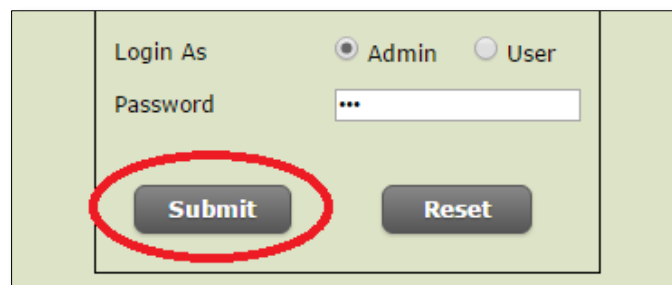


Figure 3-17: Submit

5. Hover your cursor over the **Settings** option on the main menu bar at the top of the screen, and select **Provisioning Server** from the hover-over menu (Figure 3-18).

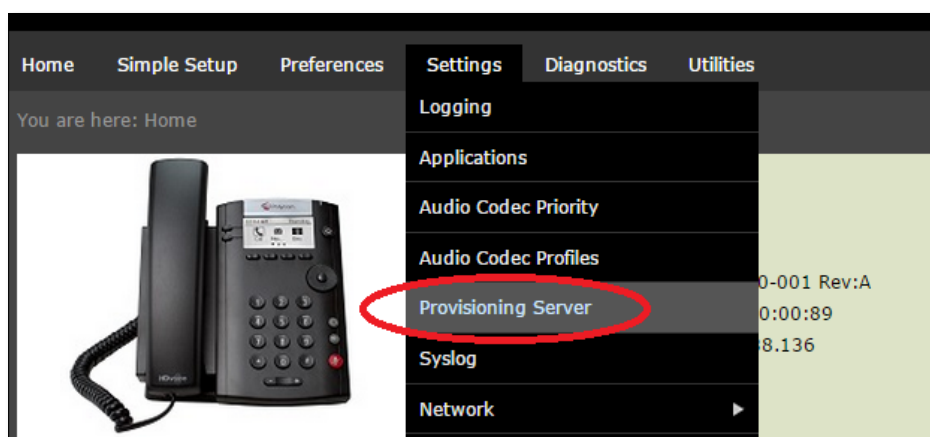
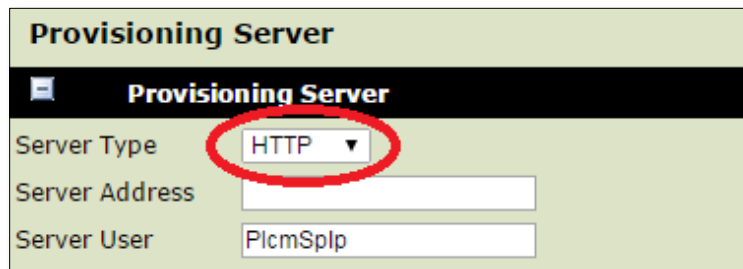


Figure 3-18: Settings Hover-Over List

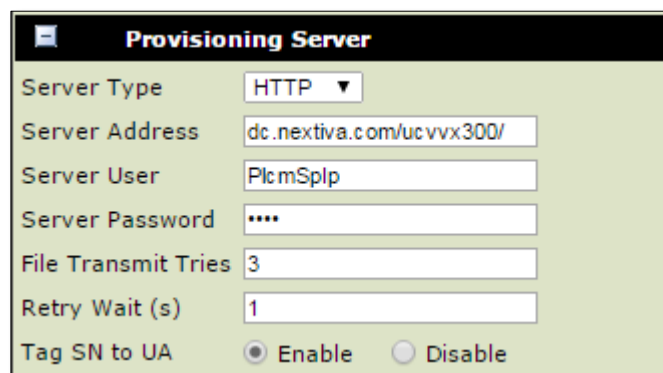
6. Select **HTTP** in the **Server Type** drop-down list at the top of the screen (*Figure 3-19*).



The screenshot shows the 'Provisioning Server' configuration window. The 'Server Type' dropdown menu is highlighted with a red circle and is set to 'HTTP'. Below it, the 'Server Address' field is empty, and the 'Server User' field contains 'PlcmSplp'.

Figure 3-19: Server Type

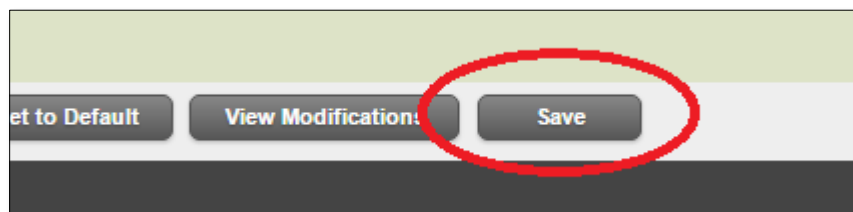
7. Enter **dc.nextiva.com/ucvvx201/** in the **Server Address** text box and set **Tag SN to UA** to **Enabled**. It is not necessary to edit any of the other fields on this screen (*Figure 3-20*).



The screenshot shows the 'Provisioning Server' configuration window with several fields updated. The 'Server Address' field now contains 'dc.nextiva.com/ucvvx300/'. The 'Tag SN to UA' option is set to 'Enable' (radio button selected). Other fields include 'Server Type' (HTTP), 'Server User' (PlcmSplp), 'Server Password' (masked with ****), 'File Transmit Tries' (3), and 'Retry Wait (s)' (1).

Figure 3-20: Provisioning Server Changes

8. Click the **Save** button at the bottom of the screen (*Figure 3-21*).



The screenshot shows the bottom of the configuration window with three buttons: 'Set to Default', 'View Modifications', and 'Save'. The 'Save' button is highlighted with a red circle.

Figure 3-21: Save Changes

9. Click the **Yes** button when the pop-up message appears asking if you want to save the configuration changes (Figure 3-22). The phone should reboot, provision and register. If it does not reboot, proceed to step 10.

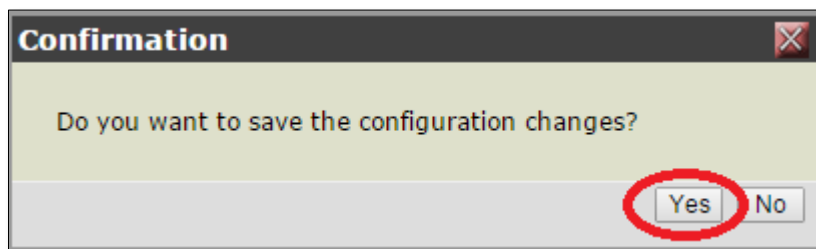


Figure 3-22: Confirmation Window

10. Go **off-hook**.
11. Press and hold the **0**, **1** and **3** keys until the phone reboots.
12. Go **on-hook**.

NOTE: In this guide, **off-hook** is used to describe when a phone is in use or has a dial tone before a call is made. **On-hook** describes when a phone is idle.

To determine if the phone is registered (which is necessary to make and receive calls), examine the phone screen. It should display the extension on the left side of the screen along with a check mark (Figure 3-23).



Figure 3-23: Active Line

Enabling the Web Configuration Utility

When the device reprograms itself as a part of provisioning process, the web configuration utility will be disabled. This is a default action done to protect your phone from outside influence. If the IP address does not load the phone's web interface, follow the steps below to enable the web configuration utility.

1. Press the **HOME** button on the upper-right of the phone.

2. Select **Settings** → **Advanced...** from the menu (Figure 3-24).



Figure 3-24: Advanced Settings

3. Enter **456** for the password, and then press the **Enter** softkey at the bottom of the screen (Figure 3-25).



Figure 3-25: Enter Password

NOTE: If the phone displays "Sorry, try again" when entering 456 as the password, you will need to contact your previous service provider to obtain the password, or factory reset the phone using the instructions in the "Factory Reset" section of this guide (Figure 3-26).



Figure 3-26: Incorrect Password

4. Select **Admin Settings** → **Web Server Config...** from the menu (Figure 3-27).



Figure 3-27: Admin Settings

5. Set the **Web Server** to **Enabled** and the **Web Config** to **HTTP/HTTPS** (Figure 3-28).

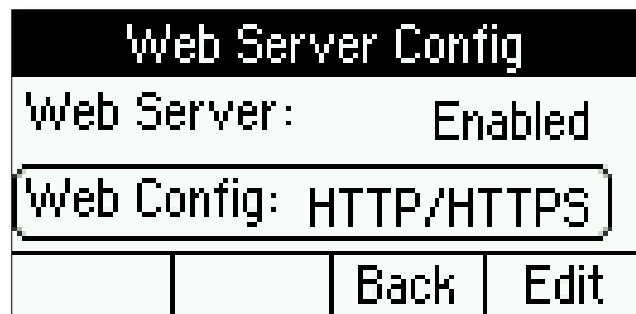


Figure 3-28: Web Server Config

6. Press the **Back** softkey at the bottom of the screen once, then select **Save config**. The phone should reboot. After the phone is finished rebooting, you will be able to access the phone through a web browser on your computer (Figure 3-29).



Figure 3-29: Save Config

Additional Setup Options

Correcting the Time

If the Polycom VVX 201 does not display the correct time, first check the time zone assigned to the user in the NextOS 3.0 Beta portal. If the time zone is correct, you will need to contact Nextiva Support. A technician will assist in programming the phone to correct the time.

Line Mirroring

Line mirroring enables line 2 on the Polycom VVX 201 phone so that you can make and receive calls on that line. Any calls made or received from line 2 will use the same extension and phone number as line 1. Follow the instructions below to configure line mirroring.

1. Press the **Home** button on the right side of the phone.
2. Select **Settings** → **Advanced...** from the menu.
3. Enter **456** as the password, and press the **Enter** softkey at the bottom of the screen (*Figure 4-1*).



Figure 4-1: Enter Password

NOTE: If the phone displays “Sorry, try again” when entering 456 as the password, you will need to contact your previous service provider to obtain the password, or factory reset the phone using the instructions in the “Factory Reset” section of this guide (*Figure 4-2*).



Figure 4-2: Incorrect Password

4. Select **Admin Settings...** → **Line Configuration...** → **Line 1...** from the menu. You will know if you are on the correct screen because the top option on the Line 1 menu displays the name of the user (*Figure 4-3*).

Line 1			
Disp Name: Mary Johnson			
Address: 6871679132			
		Back	Edit

Figure 4-3: Line Configuration

5. Select **Line Keys** → **Num Line Keys** from the menu.
6. Enter **2** as the number of line keys, and then press the **Ok** softkey at the bottom of the screen (*Figure 4-4*).

Line Keys (123T)			
2			
Calls Per Line Key: 8			
<<		Cncl	Ok

Figure 4-4: Line Keys

7. Press the **Back** softkey at the bottom of the screen three times until the **Save Config** option appears on the screen.
8. Press the **Sel** softkey at the bottom of the screen to save the configuration. The phone will return to the main screen, and the extension on line 1 will be “mirrored” to line 2 (*Figure 4-5*).

Line Configuration			
Exit w/o Save			
Save Config			
			Sel

Figure 4-5: Save Config

Busy Lamp Field (BLF)

BLF is not supported on the Polycom VVX 201.

Configuring Directories

The Polycom VVX 201 phone supports remote directories including Common and Personal Phone Lists (third-party contacts) as well as Custom Contact Directories (internal users). While some of the remote directory configuration can be performed by you, it cannot be completed without the help of a Nextiva Technician. As a user, you can create a list of contacts as a CSV file that a Nextiva Technician can use to integrate into a directory. Follow the steps below to create a CSV file of contacts ready for upload:

Creating a List of Contacts:

Up to 500 third-party contacts to be imported to the account at one time. Each account can have up to 10,000 contacts total. However, the Polycom VVX 201 phone will only store a maximum of 99 contacts at a time.

To avoid errors when uploading a contact list, the list needs to be formatted as a **.csv** file. The names and numbers should be entered as shown below (*Figure 4-6*). For best results, use a simple text editor such as Microsoft Notepad®. Using Microsoft Office® programs such as Excel® and Word® may cause errors due to additional formatting added by those programs.

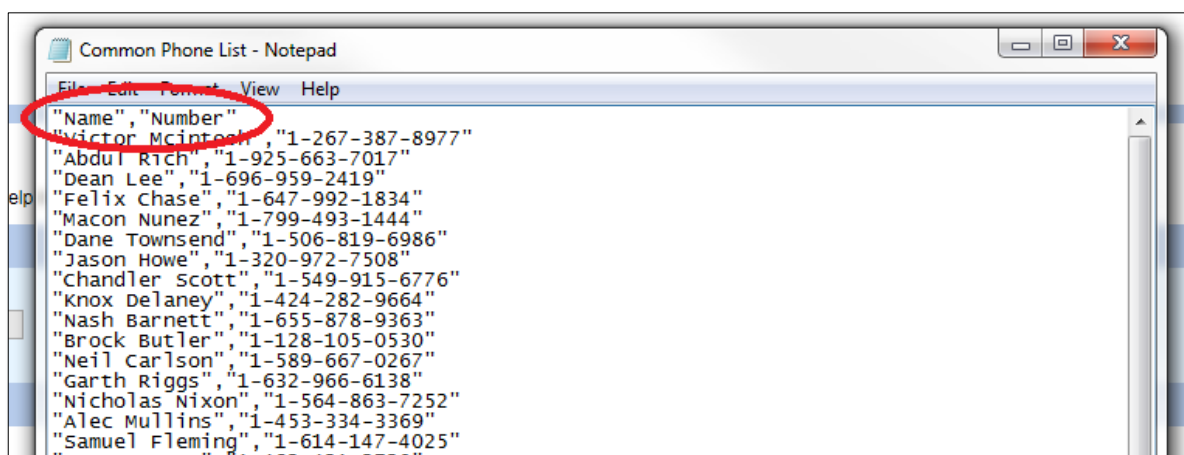


Figure 4-6: Example CSV Contact List

Speed Dials

While it is possible to set up speed dials through the menu on the Polycom VVX 201, setting up speed dials using Nextiva's included speed dial features, Speed Dial 8 or Speed Dial 100, is preferred. Doing so will ensure your speed dials are not lost in the event of device hardware failure. Follow the instructions below to set up Speed Dial 8, which will allow the user to dial frequently called numbers using 2 through 9 on their keypad.

From the Polycom VVX 201 Phone:

1. Go **off-hook**.
2. Dial ***74** from the phone.
3. After the beeps, enter the number to be used for the speed dial, then the phone number or extension, followed by #.

EXAMPLE: to set up the number 3 as a speed dial to 4805551234, first enter 3, then 4805551234, then # (34805551234#).

4. Go **on-hook**.

For instructions on how to use Speed Dial 8, see the section titled

Speed Dials under Basic Phone Usage later in this guide.

From the NextOS 3.0 Portal

1. For Administrators, log in to the NextOS 3.0 Beta portal by visiting www.nextiva.com and clicking on the customer Login found at the top right.
2. Log in to the NextOS 3.0 Beta portal with your login credentials.
3. From the main dashboard, click **Manage** in the **Users** tile (*Figure 4-7*).

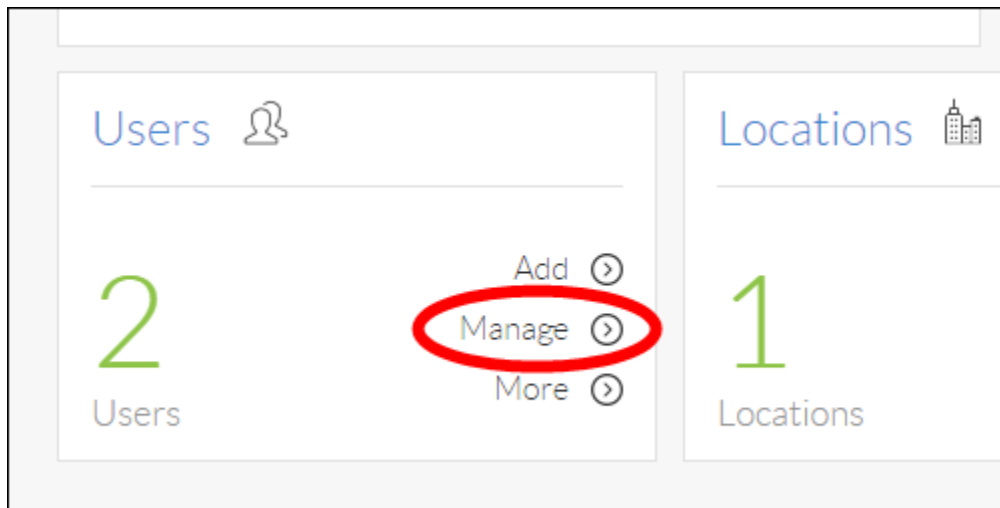


Figure 4-7: Manage Users

4. Hover your cursor over the user you want to set up speed dials for, and click the **pencil icon** to the right (*Figure 4-8*).

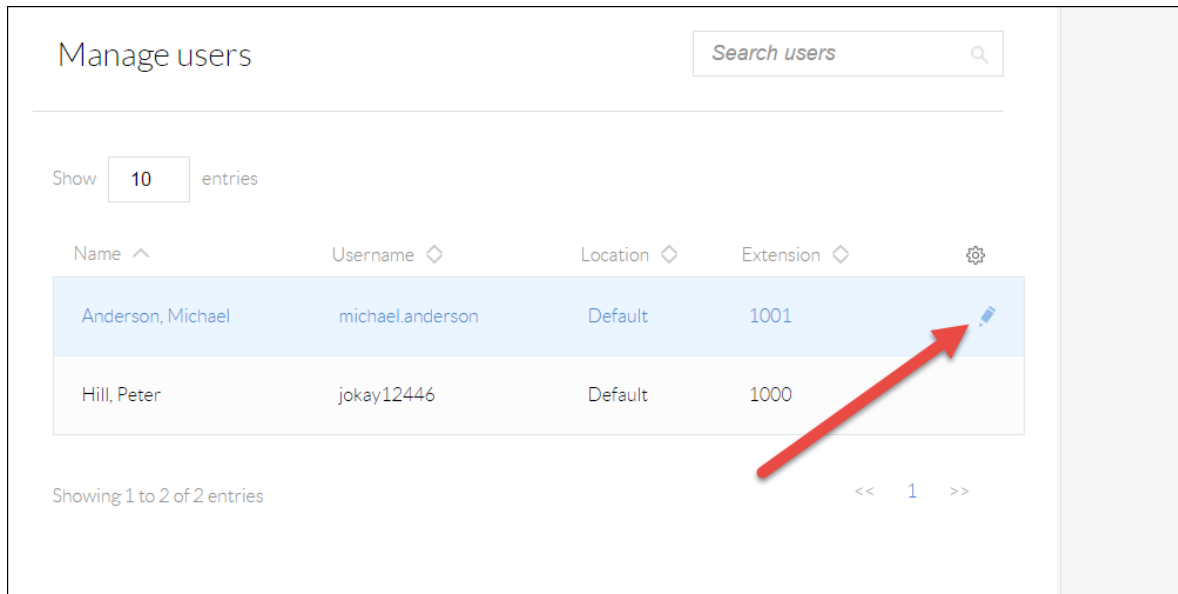


Figure 4-8: Edit User

5. Scroll down and select the **Routing** section (*Figure 4-9*).

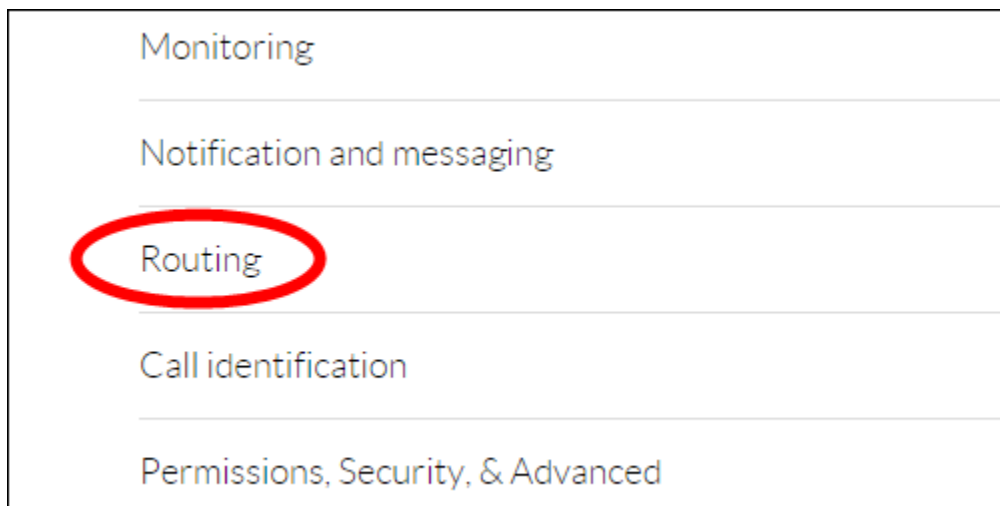


Figure 4-9: Routing Section

6. Click the **pencil icon** to the right of Speed dial (*Figure 4-10*).

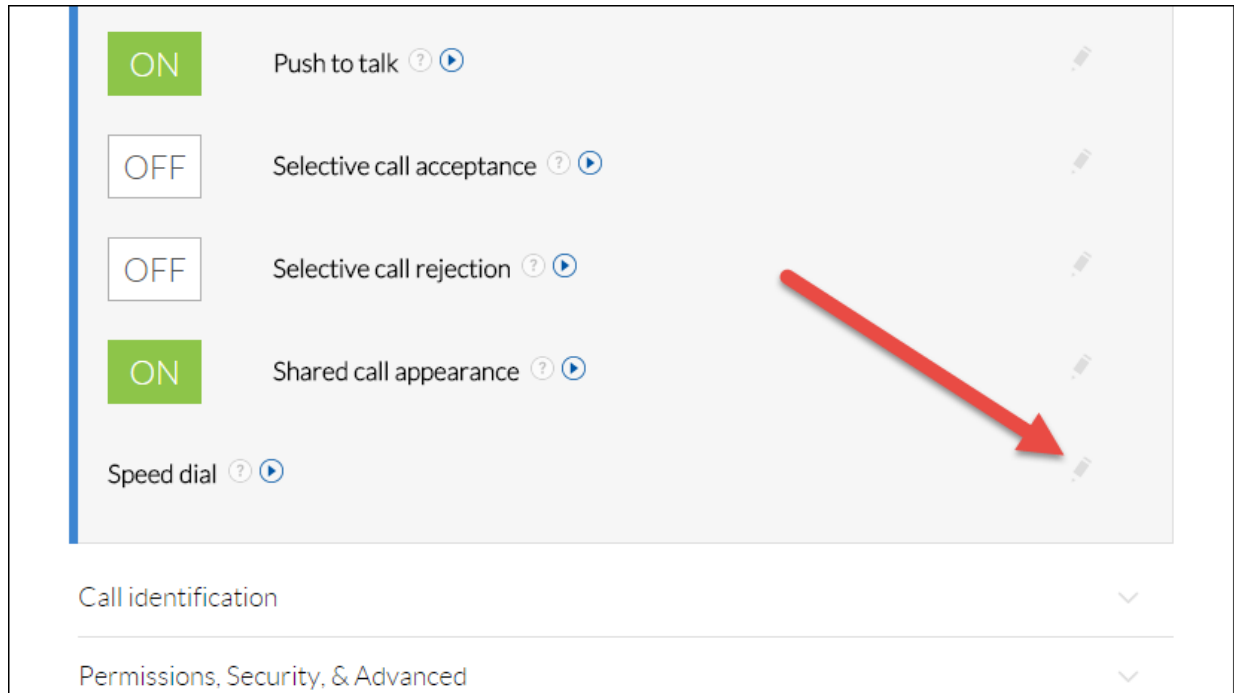


Figure 4-10: Speed Dial

7. Click the **plus sign** at the bottom-right (*Figure 4-11*).

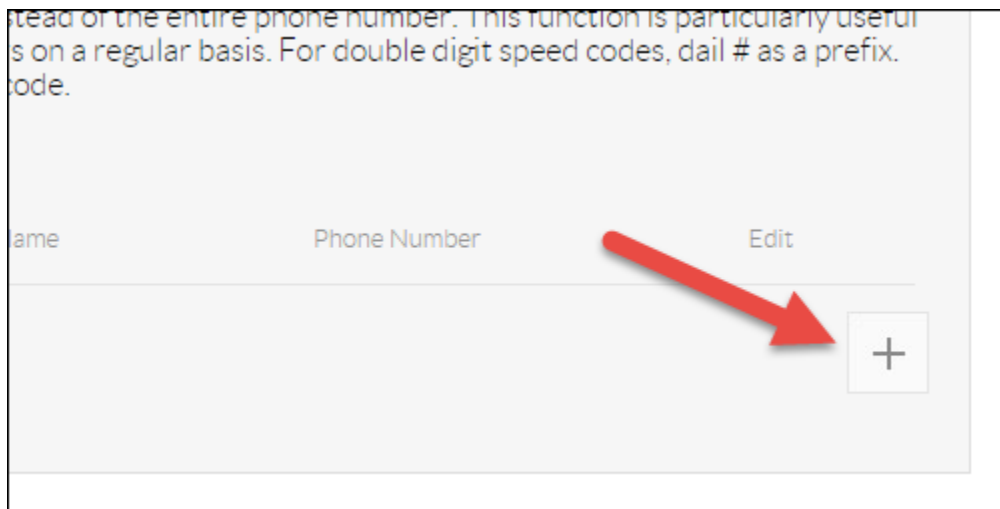
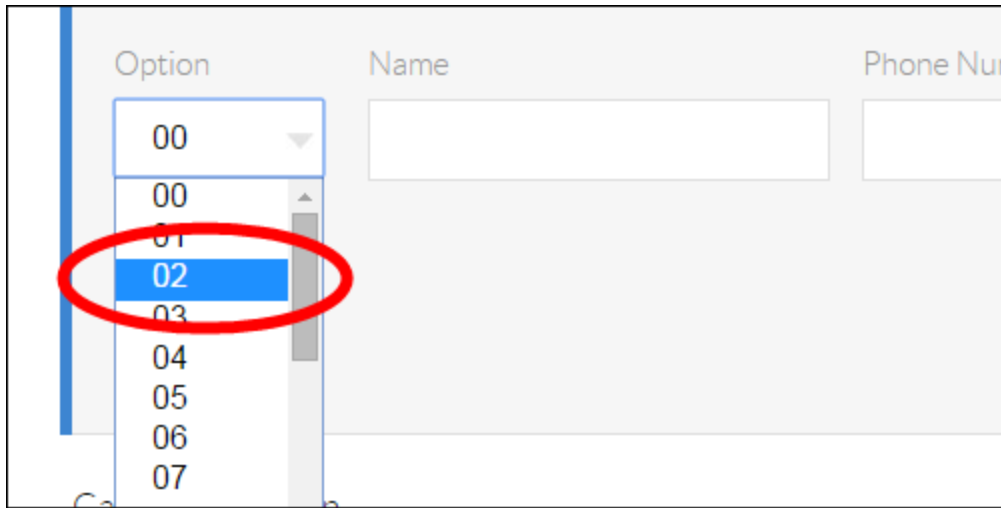


Figure 4-11: Add Speed Dial

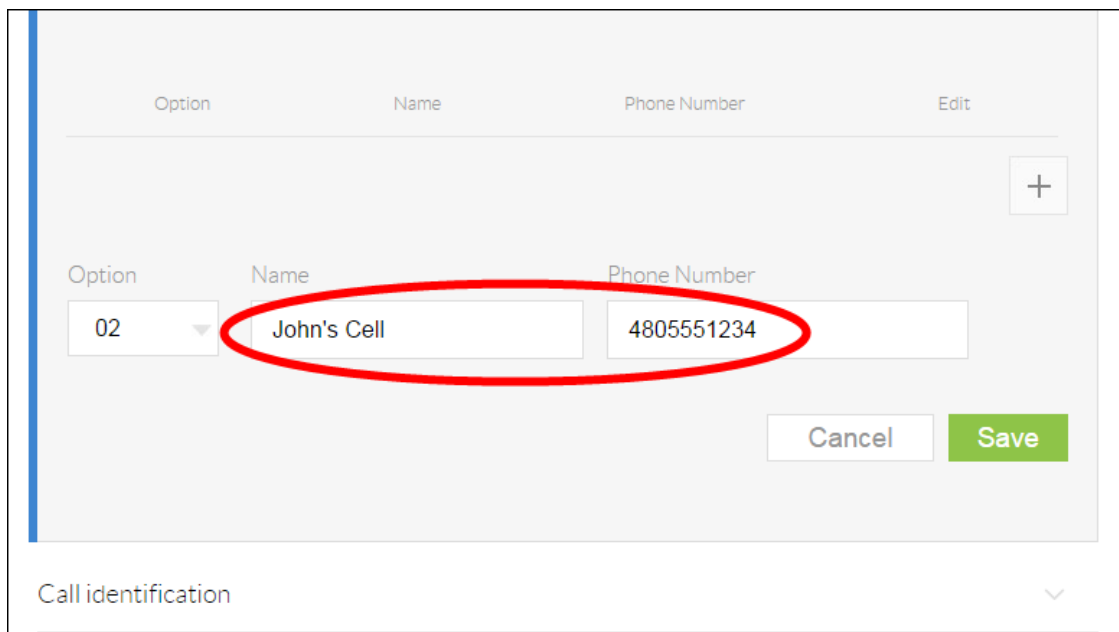
8. Select the speed dial number from the **Option** drop-down list (Figure 4-12).



The screenshot shows a form with three columns: 'Option', 'Name', and 'Phone Number'. The 'Option' dropdown menu is open, displaying a list of numbers from 00 to 07. The number '02' is highlighted in blue and circled in red. The 'Name' and 'Phone Number' text boxes are empty.

Figure 4-12: Select Speed Dial Number

9. Enter a descriptive name for the speed dial in the **Name** text box, and then enter the phone number or extension in the **Phone Number** text box. Please note that special characters or spaces are not supported for the speed dial descriptive name (Figure 4-13).



The screenshot shows the same form as Figure 4-12, but now with data entered. The 'Option' dropdown is set to '02'. The 'Name' text box contains 'John's Cell' and the 'Phone Number' text box contains '4805551234'. Both the 'Name' and 'Phone Number' fields are circled in red. At the bottom right, there are 'Cancel' and 'Save' buttons. At the bottom left, there is a 'Call identification' dropdown menu.

Figure 4-13: Configure Speed Dial

10. Click the green **Save** button at the bottom-right of the Speed dial menu. A pop-up message appears stating that the speed dial 100 settings have been saved successfully (*Figure 4-14*).

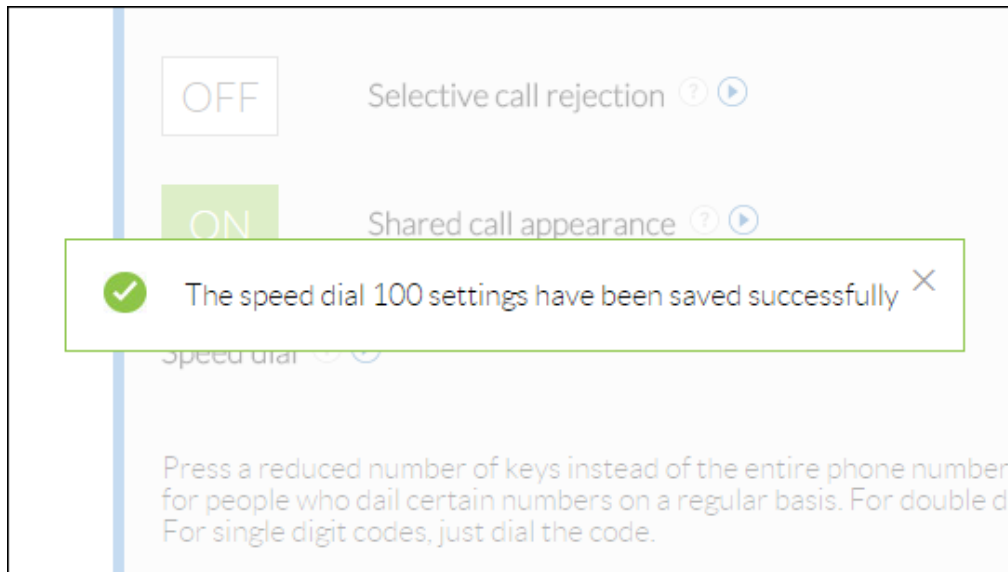


Figure 4-14: Confirmation Message

For instructions on how to use Speed Dial 8, see the section titled “

Speed Dials” in this guide.

Automatic Call Distribution (ACD)

The Polycom VVX 201 supports phone integration with Nextiva Call Center Pro and Nextiva Call Center Enterprise’s ACD states, allowing the users to sign in, sign out or go unavailable in a Call Center from their phone’s interface. To set up this feature, contact Nextiva Support.

Conferencing Setup

By default, when the initiating party on a conference call disconnects, the remaining two parties will still be able to speak to each other. To change this default behavior, contact Nextiva Support

Basic Phone Usage

Making a Call

NOTE: If you dial the full 10-digit phone number of the party you want to call, the Polycom VVX 201 will automatically start dialing, so pressing the Send softkey is not necessary.

Using the Handset:

1. Go **off-hook**.
2. Dial the phone number or extension of the party you want to call, and press the **Send** softkey at the bottom of the screen (*Figure 5-1*).



Figure 5-1: Dialed Numbers

3. When finished, go **on-hook** to disconnect the call.

Using the Speakerphone:

1. Press the **SPEAKERPHONE** button on the bottom-right of the phone.
2. Dial the phone number or extension of the party you want to call, and press the **Send** softkey at the bottom of the screen (*Figure 5-2*).



Figure 5-2: Dialed Numbers

3. When finished, press the **SPEAKERPHONE** button on the bottom-right of the phone to disconnect the call.

Using a Headset (optional):

1. Press the **HEADSET** button on the bottom-right of the phone.
2. Dial the phone number or extension of the party you want to call, and press the **Send** softkey (*Figure 5-3*).

*Figure 5-3: Dialed Numbers*

3. When finished, press the **HEADSET** button on the bottom-right of the phone to disconnect the call.

Making a Second Call

Before attempting to make a second call, you must set up line mirroring using the instructions in the “Line Mirroring” section. You will not be able to make a second outbound call unless this feature is setup. After you have initiated a second call, you can press the **Line 1** and **Line 2** keys to switch back and forth between the two calls.

Using the Handset:

1. While on a call, press the **Line 2** key on the left side of the phone. The first party is automatically put on hold.
2. Dial the phone number or extension of the party you want to call, and press the **Send** softkey at the bottom of the screen. If you dial the full 10 digit number of the party you want to call, the Polycom VVX 201 phone will automatically start dialing, so pressing the Send softkey is not necessary (*Figure 5-4*).

*Figure 5-4: Dialed Numbers*

- When finished, go **on-hook** or press the **End** softkey at the bottom of the screen to disconnect the call with the party to whom you are speaking (Figure 5-5).



Figure 5-5: End One Line

- To return to the other call, press the **Res** softkey at the bottom of the screen.



Figure 5-6: Resume Other Line

Using the Speakerphone:

- While on a call, press the **Line 2** key on the left side of the screen. The first call is automatically put on hold.
- Dial the phone number or extension of the party you want to call, and press the **Send** softkey. If you dial the full 10 digit number of the party you want to call, the Polycom VVX 201 phone will automatically start dialing, so pressing the Send softkey is not necessary (Figure 5-7).



Figure 5-7: Dialed Numbers

- When finished, press the **SPEAKERPHONE** button on the bottom-right of the phone or press the **End** softkey at the bottom of the screen to disconnect the call with the party to whom you are speaking (Figure 5-8).



Figure 5-8: End One Line

- To return to the other call, press the **Res** softkey at the bottom of the screen (Figure 5-9).



Figure 5-9: Resume Other Line

Using a Headset (optional):

- While on a call, press the **Line 2** key on the left side of the screen. The first party is automatically put on hold.
- Dial the phone number or extension of the party you want to call, and press the **Send** softkey. If you dial the full 10 digit number of the party you want to call, the Polycom VVX 201 phone will automatically start dialing, so pressing the Send softkey is not necessary (Figure 5-10).



Figure 5-10: Dialed Numbers

- When finished, press the **HEADSET** button on the bottom-right of the phone, or press the **End** softkey at the bottom of the screen to disconnect the call with the party to whom you are speaking (Figure 5-11).



Figure 5-11: End One Line

- To return to the other call, press the **Res** softkey at the bottom of the screen (Figure 5-12).

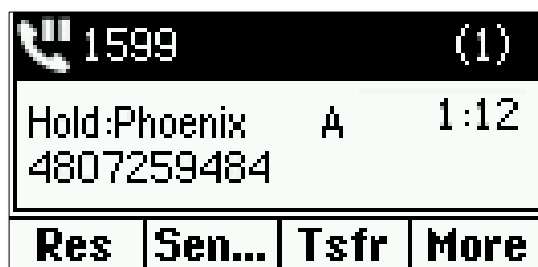


Figure 5-12: Resume Other Line

Accepting a Call

Using the Handset:

- While the phone is ringing, go **off-hook**.

Using the Speakerphone:

- While the phone is ringing, press the **SPEAKERPHONE** button on the bottom-right of the phone, or press the **Ans** softkey at the bottom of the screen (Figure 5-13).



Figure 5-13: Incoming Call

Using a Headset (optional):

1. While the phone is ringing, press the **HEADSET** button on the bottom-right of the phone.

Accepting a Second Call**Using the Handset:**

1. When you hear the call waiting tone through the handset, press the **Ans** softkey on the bottom of the screen. The first party is put on hold, and you are connected to the second call through the handset (*Figure 5-14*).

*Figure 5-14: Incoming Call*

2. To return to the first call, press the **Line 1** key on the left side of the screen. Press the **Line 2** key to return to the second call.
3. When finished speaking to the second party, go **on-hook** to disconnect the call, and then press the **Res** softkey at the bottom of the screen to return to the first call (*Figure 5-15*).

*Figure 5-15: Resume Original Call*

Using the Speakerphone:

1. When you see the second incoming call on the screen, press the **Ans** softkey on the bottom of the screen. The first party is put on hold, and you are connected to the second call through the speakerphone (*Figure 5-16*).



Figure 5-16: Incoming Calls

2. To return to the first call, press the **Line 1** key on the left side of the screen. Press the **Line 2** key to return to the second call.
3. When finished speaking to the second party, press the **SPEAKERPHONE** button on the bottom-right of the phone or press the **End** softkey at the bottom of the screen to disconnect the call. Then press the **Res** softkey to return to the first call (*Figure 5-17*).



Figure 5-17: Resume Original Call

Using a Headset (optional):

1. When you see the second incoming call on the screen, press the **Ans** softkey on the bottom of the screen. The first party is put on hold, and you are connected to the second call through the headset (*Figure 5-18*).



5-18: Incoming Call

2. To return to the first call, press the **Line 1** key on the left side of the screen. Press the **Line 2** key to return to the second call.
3. When finished speaking to the second party, press the **HEADSET** button on the bottom-right of the phone, or press the **End** softkey at the bottom of the screen to disconnect the call. Then press the **Res** softkey to return to the first call (*Figure-19*).



5-19: Resume Original Call

Terminating a Call

Using the Handset:

1. While on a call, go **on-hook** or press the **End** softkey at the bottom of the screen (*Figure 5-20*).



Figure 5-20: End Call

Using the Speakerphone:

1. While on a call, press the **SPEAKERPHONE** button on the bottom-right of the phone, or press the **End** softkey at the bottom of the screen (*Figure 5-20*).



Figure 5-21: End Call

Using a Headset (optional):

1. While on a call, press the **HEADSET** button on the bottom-right of the phone, or press the **End** softkey at the bottom of the screen (*Figure 5-22*).



Figure 5-22: End Call

Transferring a Call

There are two types of transfers – a warm transfer (attended) and a blind transfer (unattended). A warm transfer occurs when you speak with the party you are transferring the call to before you transfer the call to them. With a blind transfer you do not speak with the receiving party.

Warm Transferring:

1. While on a call, press the **Tsfr** softkey at the bottom of the screen. The party you were speaking to is put on hold, and you will hear a dial tone (*Figure 5-23*).

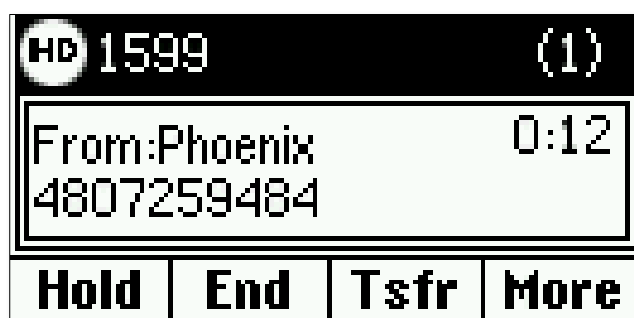


Figure 5-23: Transfer Call

2. **Dial** the phone number or extension of the party to whom you want to transfer the call, and press the **Send** softkey at the bottom of the screen. Wait for the other party to answer, so you can speak with them before transferring the call (*Figure 5-24*).



Figure 5-24: Dial Second Number

NOTE: To cancel the transfer and return to the original party, press the **Cncl** softkey at the bottom of the screen (*Figure 5-25*).

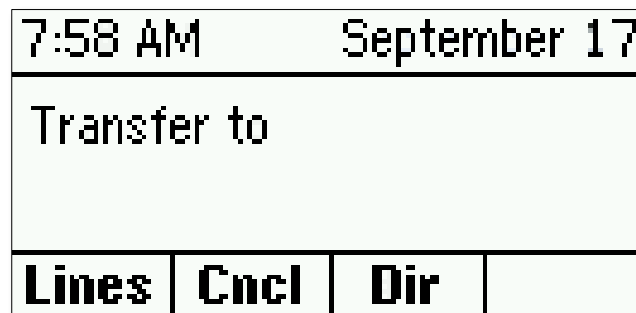


Figure 5-25: Cancel Option

3. When the other party is ready to accept the call, press the **Tsfr** softkey at the bottom of the screen again.

Blind Transferring:

1. While on a call, press the **More** softkey at the bottom of the screen twice, and then press the **BlindX** softkey at the bottom of the screen (*Figure 5-26*).



Figure 5-26: BlindX

2. **Dial** the phone number or extension of the party to whom you want to transfer, and press the **Enter** softkey at the bottom of the screen. If you dial the full 10 digit number of the party you want to call, the Polycom VVX 201 phone will automatically start dialing, so pressing the Enter softkey is not necessary (*Figure 5-27*).



Figure 5-27: Blind Transfer

NOTE: To cancel the transfer and return to the original party, press the **Cncl** softkey at the bottom of the screen.

Conferencing

1. While on a call, press the **More** softkey at the bottom of the screen once. Then press the **Conf** softkey at the bottom of the screen. The party you were speaking to is put on hold, and you will hear a dial tone (Figure 5-28).

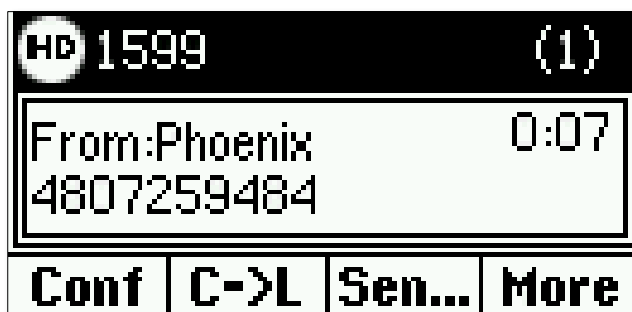


Figure 5-28: Conference Softkey

2. **Dial** the phone number or extension of the party you want to add to the conversation, and press the **Send** softkey at the bottom of the screen. Wait for the other party to answer, so you can speak with them before conferencing in the original party (Figure 5-29).



Figure 5-29: Enter Second Number

NOTE: If you dial the full 10-digit phone number of the party you want to call, the Polycom VVX 201 will automatically start dialing, so pressing the Send softkey is not necessary.

3. Press the **More** softkey again, and then press the **Conf** softkey again to add the original party to the conversation.

NOTE: By default, when you disconnect the call, the other two parties can still speak to each other until either party disconnects. This behavior can be changed by contacting Nextiva Support.

Checking Voicemail

When you have a new unread voicemail message, the message waiting indicator light on the upper-right of the Polycom VVX 201 phone **flashes red**. The icon to the left of the extension on the screen changes to an envelope, and the number of unread messages you have is displayed in the upper-right corner of the screen (*Figure 5-30*).

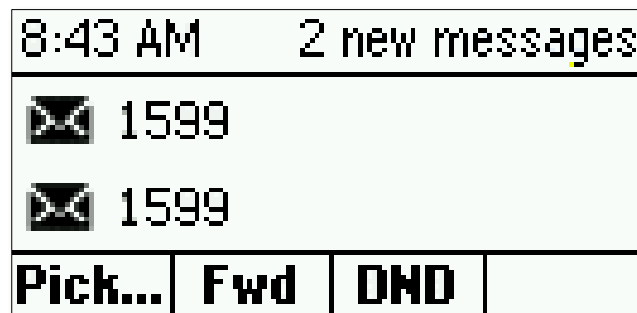


Figure 5-31: New Messages Notification

Before you can check your voicemail messages, you must set up your voicemail box. This requires changing your voicemail password and recording your name (e.g., John Smith). Follow the instructions below to complete the initial setup of your voicemail box.

1. Dial extension 9999 from your Polycom VVX 201 phone using the instructions in Making a Call.
2. Enter your password when prompted. The default password is **0000#**.
3. If this is your first time checking your voicemail, follow the prompts to change your password, and record your name.
4. Press **1** to access your voicemail box.
5. Press **1** to listen to your messages.
6. When finished, hang up the call, or proceed to the instructions below.

By default, if you do not answer your phone after 3 rings, the call will be forwarded to voicemail, and callers will hear your recorded name followed by a message saying “is not available to take your call, please leave a message after the beep.” If desired, you can set up a longer, more personal greeting after the initial voicemail setup is complete. Follow the instructions below to do this.

Recording a Custom Voicemail Greeting

To set up a custom No Answer greeting, which is the default greeting that plays if you do not answer your phone after 3 rings, follow the instructions below.

1. Dial extension 9999 from the Polycom VVX 201 phone using the instructions using the instructions in Making a Call.
2. Enter your password when prompted to.
3. Press **1** to access your voicemail box.
4. Press **3** to record a No Answer greeting.
5. Press **1** to record a new No Answer greeting, and press **#** when you are done speaking.
6. When finished, **hang up** the call.

Using Directories

The Polycom VVX 201 phone supports remote directories, including Common and Personal Phone Lists (third-party contacts), as well as Custom Contact Directories (internal users). When downloaded to the phone, all of these directories are combined together and can be accessed from the same menu on the phone.

Making a New Call

1. Press the **HOME** button on the upper-right of the phone.
2. Select **Dirs** → **Contact Dir...** from the menu. The list of contacts appears on the screen alphabetically by last name (*Figure 5-32*).

Contact Directory			
Ahmed Carver		131595...	
John Cell		60240...	
Dial	Srch	Add	Info

Figure 5-32: Contact Directory

3. Scroll through the list of names. Select the contact you would like to call, and then press the **Dial** softkey at the bottom of the screen.

NOTE: By default, the phone will dial out using the speakerphone. To switch to handset or headset mode, go **off-hook** or press the **HEADSET** button.

- When finished, press the **End** softkey at the bottom of the screen to disconnect the call (Figure 5-33).



Figure 5-33: End Call

During a Transfer

- While on a call, press the **Tsfr** softkey at the bottom of the screen. The party you were speaking to is put on hold, and you will hear a dial tone (Figure 5-34).



Figure 5-34: Transfer Call

NOTE: To cancel the transfer and return to the original party, press the **Cncl** softkey at the bottom of the screen (Figure 5-35).

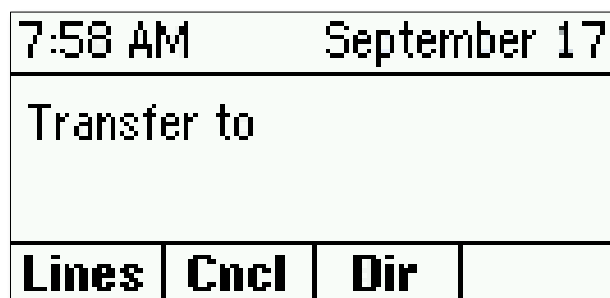


Figure 5-35: Transfer Destination

- Press the **Dir** softkey at the bottom of the screen.

3. Select **Contact Dir...** from the menu (Figure 5-36).



Figure 5-36: Contact Directory

4. Scroll through the list of names. Select the contact you would like to call, and press the **Dial** softkey at the bottom of the screen. Wait for the other party to answer, so you can speak to them before transferring the call (Figure 5-37).



Figure 5-37: Directory Selection

NOTE: To cancel the transfer at this point, press the **HOME** button on the upper-right of the phone twice to return to the **Transfer to** screen. Then press the **Cncl** softkey at the bottom of the screen (Figure 5-38).

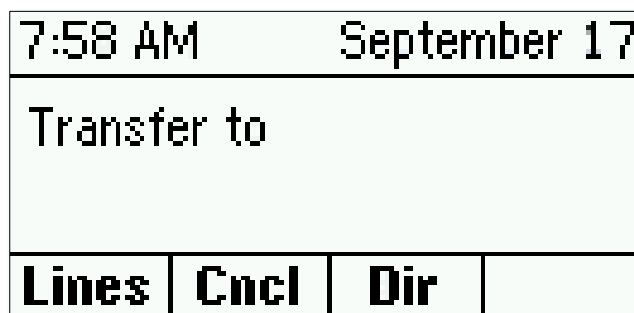


Figure 5-38: Option to Cancel

5. When the other party is ready to accept the call, press the **Tsfr** softkey at the bottom of the screen again.

During a Conference Call

1. While on a call, press the **More** softkey at the bottom of the screen once. Then press the **Conf** softkey at the bottom of the screen. The party you were speaking to is put on hold, and you will hear a dial tone (Figure 5-39).

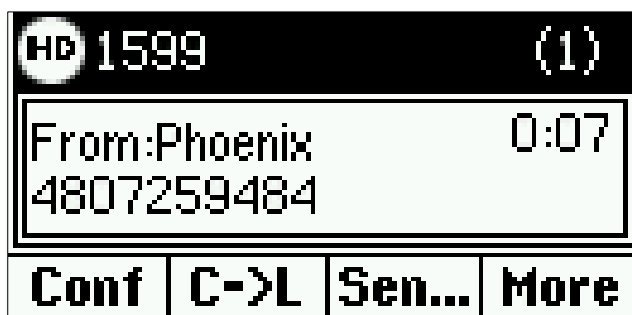


Figure 5-39: Conference Call

NOTE: To cancel the conference call and return to the original party, press the **Cncl** softkey at the bottom of the screen (Figure 5-40).

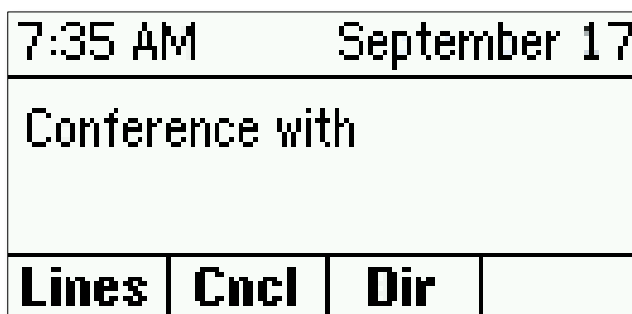


Figure 5-40: Conference Destination

2. Press the **Dir** softkey at the bottom of the screen.
3. Select **Contact Dir...** from the menu (Figure 5-41).



Figure 5-41: Contact Directory

4. Scroll through the list of names, select the contact you would like to call, and then press the **Dial** softkey at the bottom of the screen. Wait for the other party to answer, so you can speak to them before transferring the call (Figure 5-42).



Figure 5-42: Directory Selection

NOTE: To cancel the conference call at this point, press the **HOME** button on the upper-right of the phone twice to return to the **Conference with** screen. Then press the **Cncl** softkey at the bottom of the screen (Figure 5-43).

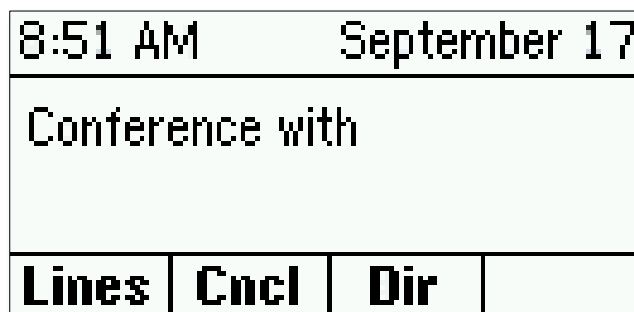


Figure 5-43: Cancel Option

5. Press the **More** softkey again, and then press the **Conf** softkey again to add the original party to the conversation.

NOTE: By default, when you disconnect the call, the other two parties can still speak to each other until either party disconnects. This behaviour can be changed by contacting Nextiva Support.

Call Lists

While Not On a Call:

1. Use the navigation keys on the right side of the phone to access the call lists.
 - Press the **down** ↓ navigation key to view the **missed calls**.
 - Press the **left** ← navigation key to view the **received (incoming) calls**.
 - Press the **right** → navigation key to view the **placed (outgoing) calls**.

- If you have more than one call, use the **up** ↑ and **down** ↓ navigation keys to scroll through the list of calls select the contact you would like to call back, and press the **Dial** softkey at the bottom of the screen (Figure 5-44).

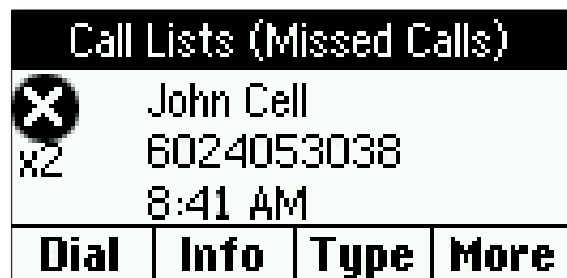


Figure 5-44: Dial from Missed Call List

NOTE: By default, the phone will dial out using the speakerphone. To switch to handset or headset mode, go **off-hook** or press the **HEADSET** button.

Making a Second Call

- While on a call, press the **HOME** button on the upper-right of the phone twice, and then select **Dir's** from the menu (Figure 5-45).

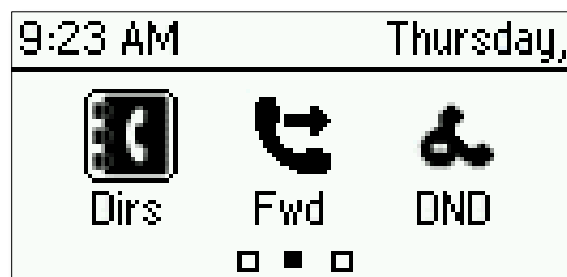


Figure 5-45: Directory in the Menu

- Select **Recent Calls...** from the menu (Figure 5-46).



Figure 5-46: Recent Calls

The Call Lists screen shows all of your missed calls, received (incoming) calls, and placed (outgoing) calls. To distinguish between them, use the icon to the left of the call. Missed calls display an **X** to the left of the call. Received calls display a **downward-left ↙** arrow, and placed calls display an **upward-right ↗** arrow (Figure 5-47).

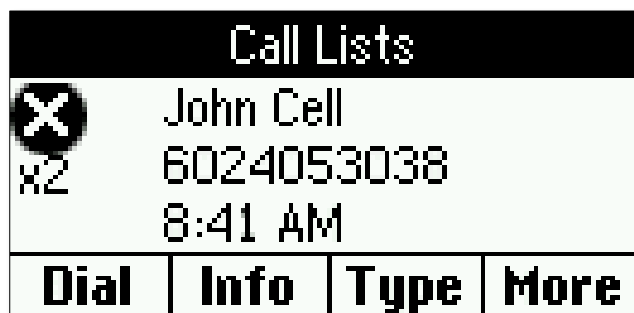


Figure 5-47: Recent Calls List

- Use the **up ↑** and **down ↓** navigation keys to scroll through the list of calls. Select the contact you would like to call, and then press the **Dial** softkey at the bottom of the screen (Figure 5-48).

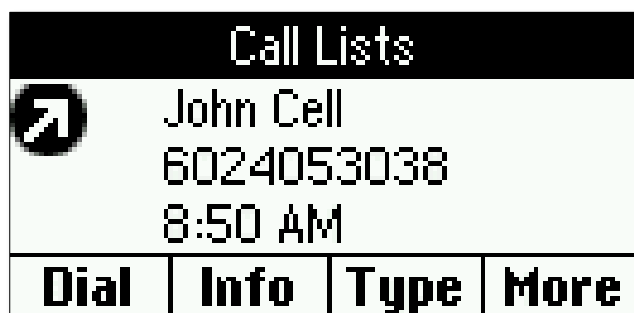


Figure5-48: Dial from Recent Calls List

- When finished, press the **End** softkey at the bottom of the screen to disconnect the call (Figure 5-49).



Figure 5-49: End Call

- To return to the original party, press the **Res** softkey at the bottom of the screen (*Figure 5-50*).



Figure 5-50: Resume Previous Call

During a Transfer

- While on a call, press the **Tsfr** softkey at the bottom of the screen. The party you were speaking to is put on hold, and you will hear a dial tone (*Figure 5-51*).

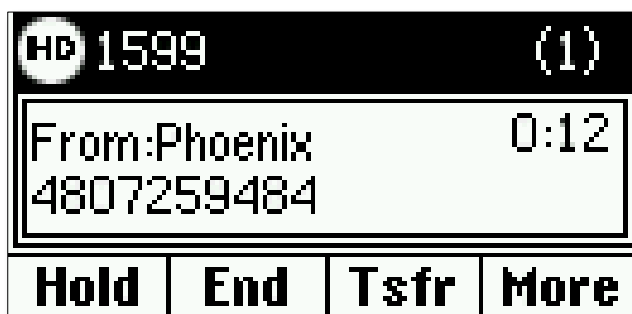


Figure 5-51: Transfer Call

NOTE: To cancel the transfer and return to the original party, press the **Cncl** softkey at the bottom of the screen (*Figure 5-52*).

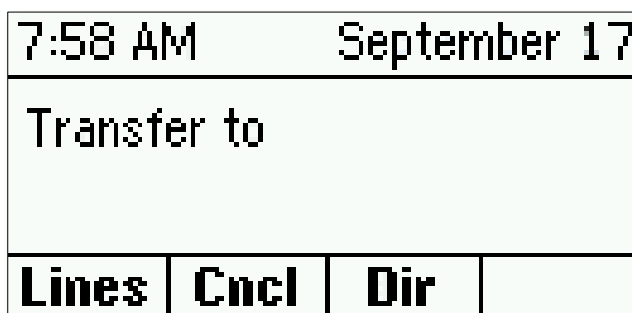


Figure 5-52: Transfer Destination

- Press the **Dir** softkey at the bottom of the screen.

3. Select **Recent Calls...** from the menu (Figure 5-53).



Figure 5-53: Recent Calls List

NOTE: To cancel the transfer at this point, press the **HOME** button on the upper-right of the phone twice to return to the **Transfer to** screen, and then press the **Cncl** softkey at the bottom of the screen (Figure 5-54).

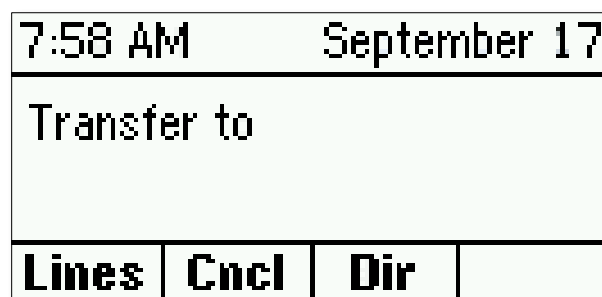


Figure 5-54: Cancel Option

4. The Call Lists screen shows all of your missed calls, received (incoming) calls, and placed (outgoing) calls. To distinguish between them, use the icon to the left of the call. Missed calls display an **X** to the left of the call, received calls display a **downward-left** ↙ arrow, and placed calls display an **upward-right** ↗ arrow (Figure 5-55).

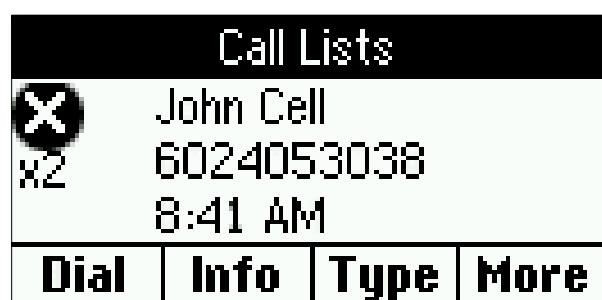


Figure 5-55: Recent Call List Selection

- Use the **up** ↑ and **down** ↓ navigation keys to scroll through the list of calls. Select the contact you would like to call, and then press the **Dial** softkey at the bottom of the screen (Figure 5-56).

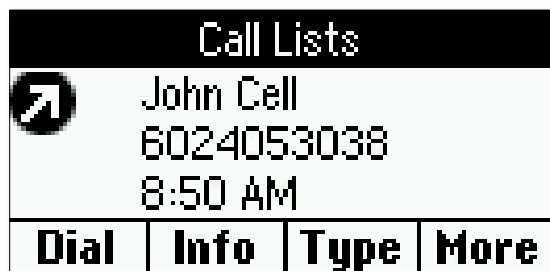


Figure 5-56: Dial from Recent Call List

- When the other party is ready to accept the call, press the **Tsfr** softkey at the bottom of the screen again.

During a Conference Call

- While on a call, press the **More** softkey at the bottom of the screen once, and then press the **Conf** softkey at the bottom of the screen. The party you were speaking to is put on hold, and you will hear a dial tone (Figure 5-57).

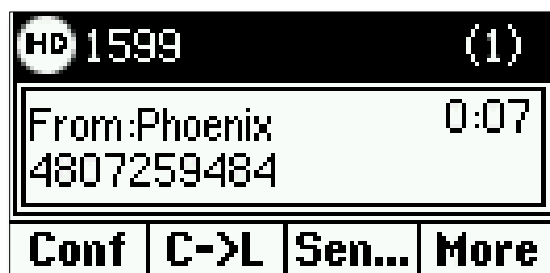


Figure 5-57: Conference Call

NOTE: To cancel the conference call and return to the original party, press the **Cncl** softkey at the bottom of the screen (Figure 5-58).



Figure 5-58: Conference Destination

2. Press the **Dir** softkey at the bottom of the screen.
3. Select **Recent Calls...** from the menu (Figure 5-59).



Figure 5-59: Recent Calls List

NOTE: To cancel the conference call at this point, press the **HOME** button on the upper-right of the phone twice to return to the **Conference with** screen, and then press the **Cncl** softkey at the bottom of the screen (Figure 5-60).

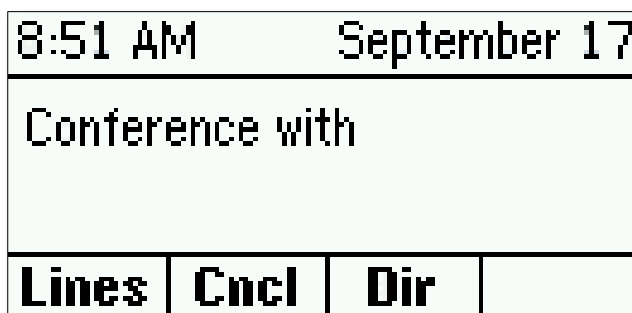


Figure 5-60: Cancel Option

4. The Call Lists screen shows all of your missed calls, received (incoming) calls, and placed (outgoing) calls. To distinguish between them, use the icon to the left of the call. Missed calls display an **X** to the left of the call, received calls display a **downward-left** ↙ arrow, and placed calls display an **upward-right** ↗ arrow (Figure 5-61).

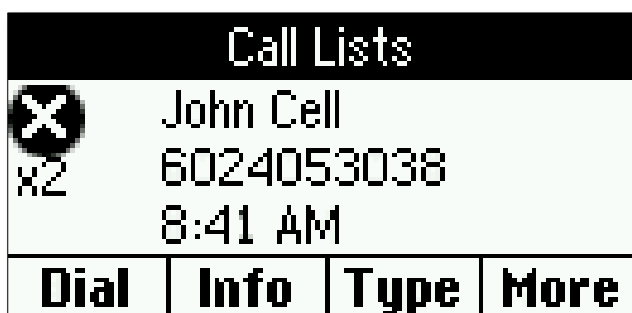
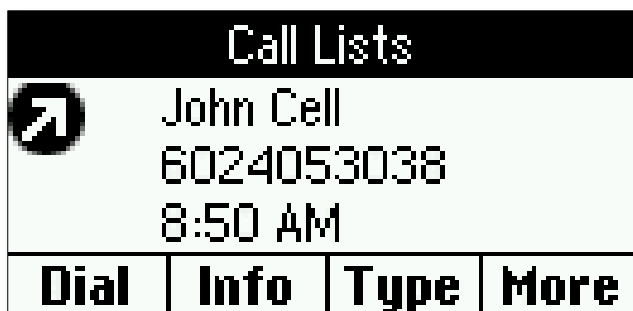


Figure 5-61: Recent Call List Selection

- Use the **up** ↑ and **down** ↓ navigation keys to scroll through the list of calls. Select the contact you would like to call, and then press the **Dial** softkey at the bottom of the screen. Wait for the other party to answer so you can speak to them before conferencing in the original party (Figure 5-62).



5-62: Dial from Recent Call List

- Press the **More** softkey again, and then press the **Conf** softkey again to add the original party to the conversation.

NOTE: By default, when you disconnect the call, the other two parties can still speak to each other until either party disconnects. This behaviour can be changed by contacting Nextiva Support.

Speed Dials

Using the Handset:

- Go **off-hook**.
- Enter** the speed dial number on the keypad, and press the **Send** softkey at the bottom of the screen (Figure 5-63).



Figure 5-63: Speed Dial Number

- When finished, go **on-hook** or press the **End** softkey at the bottom of the screen to disconnect the call (Figure 5-64).



Figure 5-64: End Call

Using the Speakerphone:

- Press the **SPEAKERPHONE** button on the bottom-right of the phone.
- Enter** the speed dial number on the keypad, and press the **Send** softkey at the bottom of the screen (Figure 5-65).



Figure 5-65: Speed Dial Number

- When finished, press the **SPEAKERPHONE** button on the bottom-right of the phone, or press the **End** softkey at the bottom of the screen to disconnect the call (Figure 5-66).



Figure 5-66: End Call

Using a Headset (optional):

1. Press the **HEADSET** button on the bottom-right of the phone.
2. **Enter** the speed dial number on the keypad, and press the **Send** softkey at the bottom of the screen (*Figure 5-67*).



Figure 5-67: Speed Dial Number

3. When finished, press the **HEADSET** button on the bottom-right of the phone, or press the **End** softkey at the bottom of the screen to disconnect the call (*Figure 5-68*).



Figure 5-68: End Call

Changing ACD States

In order for an agent to change their ACD state from a Polycom VVX 201 phone, ACD functionality needs to be enabled on the phone. To do this, please contact Nextiva Support.

Signing In

To sign in to a queue, press the **ASnIn** softkey at the bottom of the screen (*Figure 6-1*).

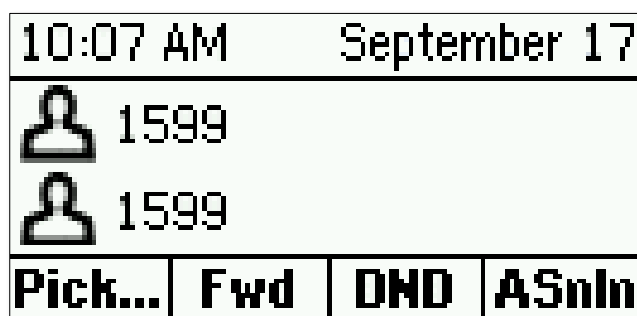


Figure 6-1: ACD Sign In Softkey

After signing in to the queue, the icon to the left of the extension changes to reflect the new status, and the Agent State displays as **Available** in the upper-right corner of the screen. From this point on, the agent will receive calls from any queues to which they are assigned (*Figure 6-2*).

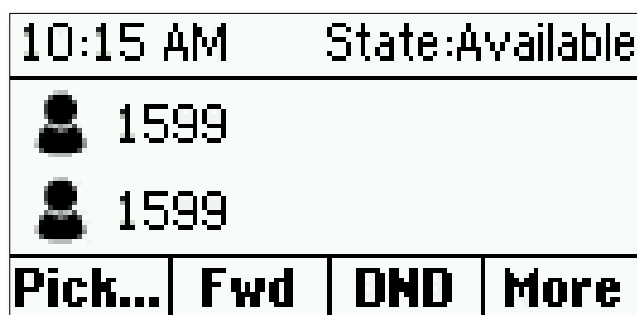


Figure 6-2: Available

Going Unavailable

Changing your ACD state to Unavailable (going unavailable) is typically done when taking a break or when you are away from your phone. To do this, press the **More** softkey at the bottom of the screen once. Then press the **Unavl** softkey at the bottom of the screen to go unavailable. This should only be done after the last active call has ended on the Polycom VVX 201 phone and the phone is idle (Figure 6-3).

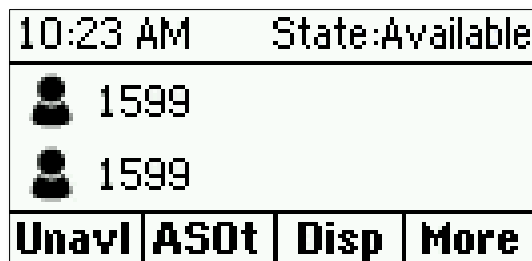


Figure 6-3: Unavailable Softkey

NOTE: At this time, Nextiva does not support the use of custom unavailable codes.

After changing the ACD state to Unavailable, the icon to the left of the extension changes to reflect the new status, and the Agent State displays as **Unavailable** in the upper-right corner of the screen (Figure 6-4).

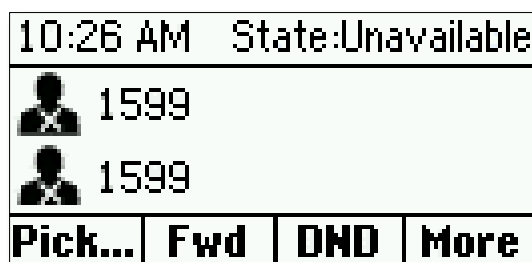


Figure 6-4: Unavailable

Going Available

When returning to your desk from a break, meeting, etc., you need to change your ACD state to Available (go available) again. To do this, press the **More** softkey at the bottom of the screen once. Then press the **Avl** softkey at the bottom of the screen to go Available (*Figure 6-5*).

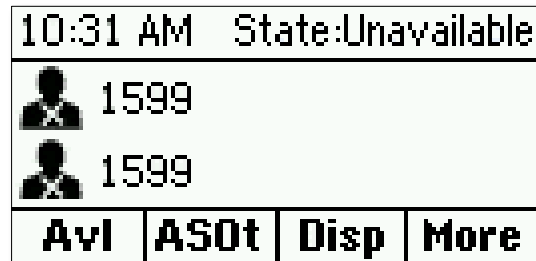


Figure 6-5: Available Softkey

After going Available, the icon to the left of the extension changes to reflect the new status, and the Agent State displays as **Available** in the upper-right corner of the screen (*Figure 6-6*).

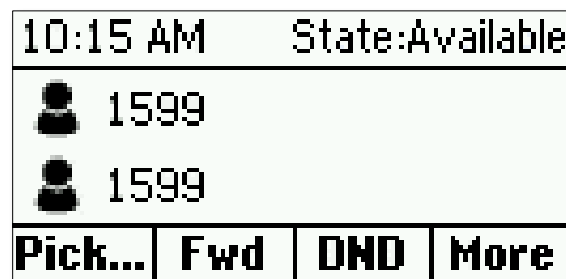


Figure 6-6: Available

Accepting a Call

By default, when a call routes to your Polycom VVX 201 phone, statistics for the queue will display on the screen, and the **Ans** softkey will not be visible without pressing the **Exit** softkey at the bottom of the screen first (Figure 6-7). To answer the call, you can follow the information presented in the Basic Phone Usage section of this guide.

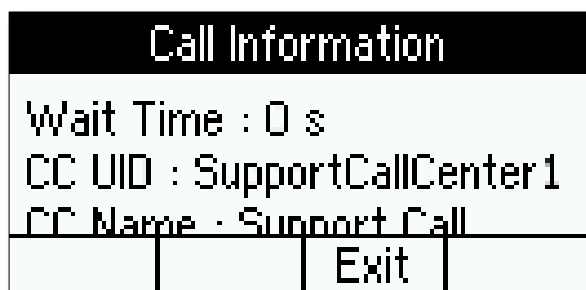


Figure 6-7: Information for Call from Queue

Disposition Codes

Disposition Codes are attributes applied to a call to identify marketing promotions or other topics pertaining to a call. If the administrator for your Nextiva account has enabled disposition codes on your call center, you can apply a Disposition Code to a call while the call is still in progress. Follow the instructions below to do this.

1. While on a call, press the **More** softkey at the bottom of the screen twice, and then press the **Disp** softkey at the bottom of the screen (Figure 6-8).

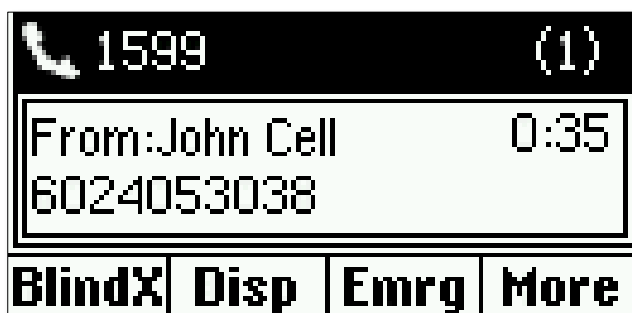


Figure 6-8: Disposition Softkey

2. **Enter** the disposition code given to you by the administrator for your Nextiva account (Figure 6-9).

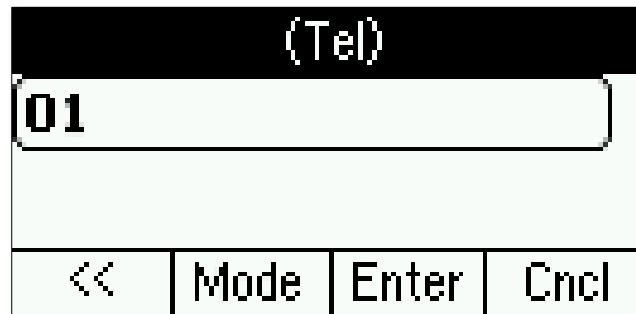


Figure 6-9: Entering the Disposition Code

3. Press the **Enter** softkey at the bottom of the screen. You are taken back to the main screen which shows the caller ID of the incoming call and the running length of the call (Figure 6-10).

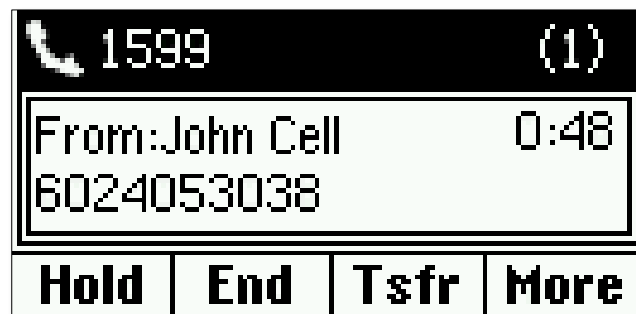


Figure 6-10: Current Call Information

Wrap-Up

Wrap-Up refers to the time after a call ends and before another call is routed to the agent's phone. This is an optional state that can be enabled or disabled for your call center. If the administrator for your Nextiva account has enabled Wrap-Up on the call center, then immediately after the last active call ends on your Polycom VVX-201 phone, the icon to the left of the extension changes to reflect the new Wrap-Up status, and the Agent State displays as **Wrap-Up** in the upper-right corner of the screen (Figure 6-11).

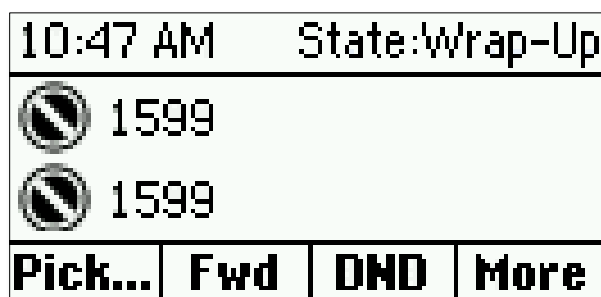


Figure 6-11: Wrap-Up

From here, you can either wait for the default wrap-up time to expire (typically 30 seconds), or you can press the **More** softkey at the bottom of the screen once, and then press the **Avl** softkey at the bottom of the screen to go available immediately (Figure 6-12).

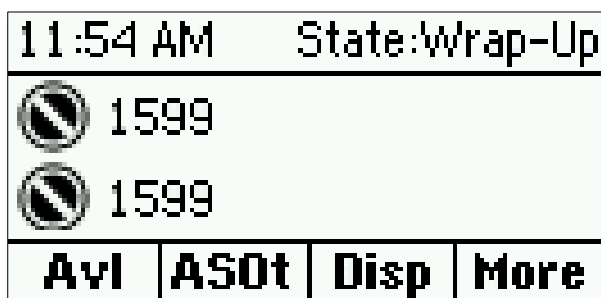


Figure 6-12: Wrap-Up Options

Signing Out

When going to lunch, leaving for the day, etc., you need to sign out of your queues. To do this, press the **More** softkey at the bottom of the screen once, and then press the **ASOt** softkey at the bottom of the screen to sign out. It does not matter whether there is still a call in progress on the Polycom VVX 201 phone when you do this (Figure 6-13).

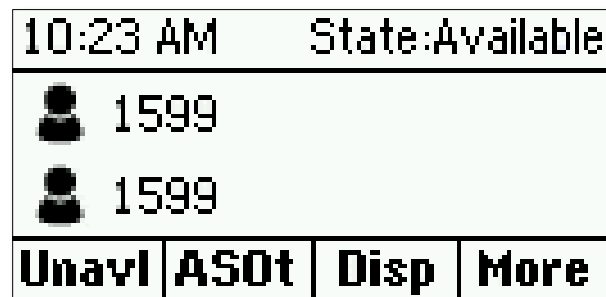


Figure 6-14: ACD Sign Out Softkey

After signing out of the queue, the icon to the left of the extension changes to reflect the new status, and the Agent State no longer displays in the upper-right corner of the screen (Figure 6-15).

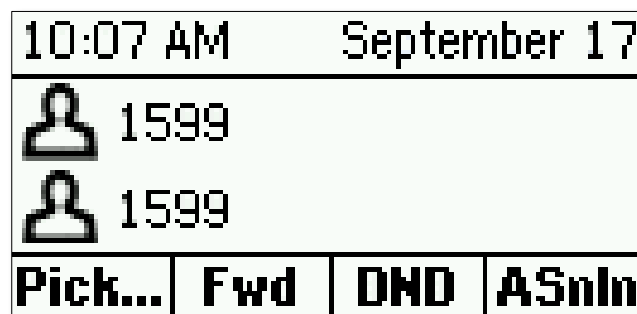


Figure 6-15: Singed Out

Additional Features

Do Not Disturb

By default, the Polycom VVX 201 has a DND softkey on the main screen. To enable and disable DND, follow the instructions below.

1. Press the **DND** softkey at the bottom of the screen to enable DND. The icon to the left of the extension changes to a dash (*Figure 7-1*).

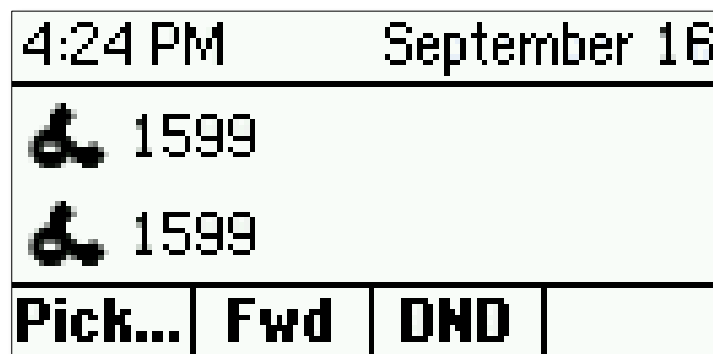


Figure 7-1: On Do Not Disturb

2. Press the **DND** softkey again to disable DND.

Factory Reset

1. Go **off-hook**.
2. Press and hold the **0**, **1**, and **3** keys until the phone starts to reboot.
3. Press the **Cancel** softkey when it appears on the screen (*Figure 8-1*).



Figure 8-1: Factory Reset

4. Press and hold the **1**, **3**, and **5** keys until a password prompt appears.
5. Enter the **MAC address** of the phone as the password. When entering letters, press the **1→Aa** softkey at the bottom of the screen to switch to letters.

NOTE: When entering the password, you will not be able to see what you are typing on the screen. In the case of entering letters, you will need to press the number keys multiple times to switch to different letters. As an example, to enter the letter **E**, first press the **1→Aa** softkey at the bottom of the screen to switch from numbers to letters, and then press the number **3** two times to enter an **E**.

6. Press the **Enter** softkey when you are done entering the password to begin the factory reset. Once the factory reset is complete, you will be able to access the advanced settings on the phone using the default Polycom password of **456**.

NOTE: If the phone does not accept the MAC address as the password, go through the factory reset process a second time. Entering the MAC address is one of the more difficult things to do with the phone, so it may take some practice.