

# Polycom VVX Cheat Sheet

## Overview

This page includes some of the most commonly used functions of the Polycom VVX SIP phone (may also be called the VX400 or VX401). Each of the tables represents a set of functions that will be available to you depending on your role within your organization as explained below:

- **General Phone Functions** - Applies to anyone who is using a Polycom VVX400/401 phone.
- **Extended Agent Functions** - Applies to those running a call center Intelliasoft setup. These functions are specific to Agents. The **General Phone Functions** also apply.
- **Extended Supervisor Functions** - Applies to those running a call center Intelliasoft setup. These functions are specific to those in a Supervisory role. The **Extended Agent Functions** and **General Phone Functions** also apply.

## General Phone Functions

| Action                                  | Instruction  |
|---|--|
| Dial                                    | Dial (optional) 9 - 911  |
| Outside Calls - Local                   | Dial (optional) 9 + (7) Digit Local Number   |
| Outside Calls - Long Distance           | Dial (optional) 9 + (10) Digit Long Distance Number  |
| Call Hold Retrieval<br>To Another Phone | Phone One: Place Call on Hold<br>Phone Two: Dial * + PhoneOneExtension where call is holding |

| Action                                    | Instruction  |
|---|--|
| Transfer Call                             | <ul style="list-style-type: none"> <li>• Have a current call active</li> <li>• Press <b>Trnsfr</b> button</li> <li>• Dial Number or press <b>Lines</b> button to select a name</li> <li>• Optionally, wait for dialed number to answer and announce transferred call</li> <li>• Press <b>Trnsfr</b> button again to complete the transfer OR press <b>Cancel</b> button and resume with dial / <b>Lines</b> above</li> </ul> |
| Transfer Call To Voicemail                | <ul style="list-style-type: none"> <li>• Have a current call active</li> <li>• Press <b>Trnsfr</b> Button (you can also place call on Hold)</li> <li>• Dial ** then press <b>Send</b> Button, immediately followed by <b>Trnsfr</b></li> </ul>   |
| Conference Call – Method 1                | <ul style="list-style-type: none"> <li>• Have a current call active</li> <li>• Press <b>Conf</b> Button</li> <li>• Dial Number or press <b>Conf</b> Button to select a name</li> <li>• Optionally, wait for dialed number to answer and announce conference call</li> <li>• Press <b>Conf</b> button again to connect all parties</li> </ul>   |
| Conference Call – Method 2                | <ul style="list-style-type: none"> <li>• Place call on Line 1</li> <li>• Place call on Line 2</li> <li>• Press <b>Join</b> button</li> </ul> <p>You may need to press the <b>More</b> button to see this option</p>  |
| Conference Call – Split Calls             | <ul style="list-style-type: none"> <li>• Press <b>VM</b> Button</li> </ul> <p>Individual calls will be split to different <b>Line</b> buttons</p>  |
| Voicemail<br>(Access from your extension) | <ul style="list-style-type: none"> <li>• Press <b>VM</b> button</li> </ul> <p>You may need to press the <b>More</b> button to see this option</p> <ul style="list-style-type: none"> <li>• Enter your pin number when prompted</li> </ul> <p>If this is your first time setting up your mailbox<br/>Your pin number is the same as your extension number</p>   |

| Action  | Instruction  |
|---|--|
| Voicemail<br>(Access from other extension)          | <ul style="list-style-type: none"> <li>Press <b>VMO</b> button</li> <li>You may need to press the <b>More</b> button to see this option</li> <li>Enter your mailbox number (extension) when prompted.</li> <li>Enter your pin number when prompted</li> </ul> <p>If this is your first time setting up your mailbox<br/>Your pin number is the same as your extension number</p> |
| Arrow Up<br>Arrow Down<br>Arrow Left<br>Arrow Right | <ul style="list-style-type: none"> <li>Press <b>↑</b> button - Favorites</li> <li>Press <b>↓</b> button - Call lists (shows missed calls)</li> <li>Press <b>←</b> button - Received calls</li> <li>Press <b>→</b> button - Placed calls</li> <li>Press <b>↶</b> twice from home screen to redial last # dialer</li> </ul>  |

# Extended Agent Functions

| Action       | Instruction  |
|--------------|--|
| Agent Login  | <ul style="list-style-type: none"> <li>Press the <b>ACD</b> button on the phone.</li> <li>Enter agent number on the phone when prompted</li> </ul>   |
| Agent Pause  | <ul style="list-style-type: none"> <li>Press the <b>PSE</b> button on the phone.</li> <li>You may need to press the <b>More</b> button to see this option</li> <li>Input pause reason code on the phone when prompted.</li> <li>Or, optionally do not enter a pause reason</li> <li>Press the <b>Enter</b> Button</li> <li>If a pause reason was not entered listen to the available pause</li> <li>reasons and then enter the pause reason when prompted</li> </ul> |
| Agent Logoff | <ul style="list-style-type: none"> <li>Press the <b>ACD</b> button on the phone.</li> <li>You will be automatically logged out</li> </ul>  |

# Extended Supervisor Functions

| Agent                                    | Action   |
|--|--|
| Voicemail (Access from your extension)   | <ul style="list-style-type: none"><li>• Press <b>VM</b> button, you may need to press the More button to see this option</li><li>• Enter your pin number when prompted, if this is your first time setting up your mailbox your pin number is the same as your extension number</li></ul>  |
| Voicemail (Access from other extensions) | <ul style="list-style-type: none"><li>• Press <b>VMO</b> button, you may need to press the <b>More</b> button to see this option</li><li>• Enter your mailbox number (extension) when prompted.</li><li>• Enter your pin number when prompted, If this is your first time setting up your mailbox your pin number is the same as your extension number</li></ul>   |
| Call Center Station Monitor              | <ul style="list-style-type: none"><li>• Press <b>Mon</b> button (Only available on Supervisor Stations)</li><li>• Enter your PIN number when prompted (Same pin number as your voicemail PIN)</li><li>• Enter extension number to monitor (If the extension has multiple Lines with calls)</li><li>• Press the # key to switch to the next call</li><li>• Press 8 to whisper to the Agent</li><li>• Press 9 to barge into the call</li></ul> |
| Day / Night                              | <ul style="list-style-type: none"><li>• Press <b>DyNgt</b> button (Depending on configuration, only available on Supervisor Stations)</li><li>• Enter your PIN number when prompted (Same pin number as your voicemail PIN)</li><li>• Follow the spoken instructions for changing your current Day/Night settings</li></ul>  |

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