

**Polycom[®] Trio 8500
Conference Telephone
Quick Start Guide**



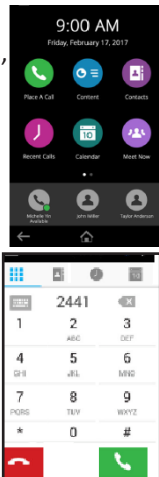
This guide covers the basic features and operation of the Polycom[®] Trio 8500 with Polycom[®] UC Firmware 5.5.1 or later and SIP 5.8.0 or later.

For more information, refer to the Star2Star Knowledge Base.

Phone Screens

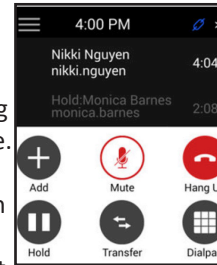
Three main touchscreens are available for the phone:

- **Main Menu/Home Screen** - Displays messages and icons to access features, settings, information, additional lines and Favorites to call Contacts.
 - Press **Home** or **Menu** to access.
 - Tap **Page Indicator** to expand/contract Home page, to control how many icons display on Home screen.
- **Place a Call Screen** - Enables quick access to Dial Pad, Recent Calls, Contacts and Calendar.
 - Tap **Place a Call** from **Home** screen or when phone is idle.



















Phone Screens - continued

- **Calls Screen** - Automatically displays list of Active and Held calls.
- Number of calls displays under associated Line.
- Maximum of 12 Active, Incoming or Held calls allowed at one time.
- **On-screen Keyboard** - Enables entering of text field information with touchscreen.
 - Displays automatically for text field.
 - If text field requires only numbers, keyboard displays only numbers.



Phone Icons Legend

The following keys or icons display on phone:

Keys	Functions
	Displays Home screen or Main Menu.
	Contacts
	Places a Call/Answers a call.
	Hangs Up a call.
	Dials a call.
	Mutes/unmutes phone speaker.
	Holds a call. Resumes a held call.
	Transfers calls to another person.
	Indicates calls are being forwarded.
	Accesses voicemail.
	Opens additional features Menu.
	Merges separate calls into a Conference.
	Adds a Contact to a Conference or Directory.
	Indicates a Favorite contact.
	Displays Recent Calls list.
	Adjusts the volume.

Place a Call

Only one call can be Active (in progress) at a time, and a maximum of 12 Active, Incoming or Held audio calls.

Do **one** of the following to place a call:

- From **Home** > **Place a Call**. Enter a phone number and **Dial**.
- From **Home**, select a **Favorite**.
- From **Contacts**, select a Directory, a Contact and **Call**.
- From **Recent Calls** and select a Contact. The Contact is dialed automatically.

Answer a Call

Incoming calls can be answered in various ways: during a call, in the Incoming Calls screen or in the Calls screen.

During an Active call a call waiting tone beeps and the **Incoming Call** screen displays.

Select **Answer**. The Active call is placed on Hold and the Incoming call becomes Active.

Conference Calls

On-phone conferencing feature is limited. To Conference up to 150 participants, contact an administrator to set up StarConference™.

Initiate a Conference call:

1. Call a Contact.
2. After the Contact answers, tap **Add**.
3. Enter another number or select **Contacts** or **Recent Calls**. The Contact is added after answering.

Add participants during a Conference call:

1. Tap **Add Participants**.
2. Enter number or select **Contacts** or **Recent Calls**.
3. Select **Dial**. The Contact is added after answering.

Merge an Active call and a Held call:

1. While in Active call, on **Calls** screen, select **Held** call.
2. Press **Merge**. The calls are merged. A Conference call is initiated.

Manage Conference options:

- **Hold** - Suspends all Conference participants.
- **Res (Resume)** - Resumes all participants.
- **Split** - Places participants on Hold in separate calls.
- **Mute** - Silences your phone microphone.
- **End** - Removes you from a Conference call. By default, when you end a Conference call, your connection to the call ends and the other participants remain in the call.

Recent Calls

The **Recent Calls** list holds up to 100 missed, received and placed calls. Follow the steps below to view, save, edit or delete a call record:

1. Navigate to **Home > Recent Calls**.
2. Select a call record and press:
 - **Info > Save** to add the caller to the Directory. If the number is not a **Favorite**, **Add to Favorites** displays.
 - **Info > Edit** to edit the number and **Dial**.
 - **Info > Delete Call** to remove a call.

Hold and Resume a Call

Active calls can be placed on Hold. During an Active call, press **Hold**. Press **Resume** to resume call.

End a Call

Use **one** of the following options to end an Active call:

- Tap **Hang Up**.
- From **Calls** screen, select the call and **Hang Up**.

To end a Held call, select call, tap **Resume > Hang Up**.

Redial a Number

Re-call the last called number with **Redial**.

1. Select **Redial > Place a Call > Recent Calls**.
2. Select the first number in the list.

Forward a Call

Manually Forward an incoming call:

1. From **Incoming Call** screen, tap **Menu > Forward**.
2. From **Call Forwarding** screen, enter forwarding number and **Forward**.

Automatically Forward all calls:

1. Select **Forward** or navigate to **Settings > Features > Forward**.
2. On **Forwarding Type Select**, select forwarding type (*Always, Busy, No Answer*). If *No Answer*, enter the number of rings before calls are forwarded.
3. Enter a forwarding number and **Enable**.

The forwarding number or name of selected Contact scrolls in the status bar.

For *Always* forwarding type, the **Forwarding** icon displays on the line.

Disable call forwarding:

1. Navigate to **Settings > Features > Forward**.
2. On **Forwarding Type Select**, select **Disable**.

Forward a Call - continued

Forward a Call with Find Me / Follow Me:

Set up Find Me / Follow Me in [Application Framework](#) or the [portal](#) to forward calls, using the linked instructions.

Transfer a Call

How to **Transfer** calls to another person depends on the default Transfer Type. **Consultative** is the default type, but can be changed as follows:

1. Navigate to **Settings > Basic > Preferences**.
2. Select **Default Transfer Type > Blind** or **Consultative**.

Blind Transfer:

- If default type is **Blind**:
 1. Select **Transfer**.
 2. Dial a number or select from **Recent Calls** or **Contacts**.
- If default type is **Consultative**:
 1. Tap **Menu > Transfer**.
 2. Dial a number or select from **Recent Calls** or **Contacts**.
 3. Select **Complete Transfer** after introducing caller.

Consultative Transfer:

- If default type is **Consultative**:
 1. Select **Consult**.
 2. Dial a number or select from **Recent Calls** or **Contacts**.
 3. Select **Complete Transfer** after introducing caller.
- If the default type is **Blind**:
 1. Tap **Menu > Consult**.
 2. Dial a number or select from **Recent Calls** or **Contacts**.
 3. Select **Complete Transfer** after introducing caller.

Favorites

Favorites are Contacts in the Local Directory called most often. Only 3 **Favorites** display on the **Home** screen. Swipe screen from right to left to display more. **Favorites** also display at the top of the list in the Local Directory.

Add or Delete a Favorite:

1. Navigate to **Contacts > Local Directory** and select a Contact.
2. From **Details** screen, tap **Favorite**.

Mute Microphone

Press **Mute/Unmute** to enable/disable microphone.

Ring Tones

Change **Ring Tones** for Incoming calls as follows:

- Navigate to **Settings > Basic > Preferences > Ring Type**.
- Select a ringtone.
- Select **Play** to hear the ringtone.

Record a Call

If Recording is available, connect a USB flash drive to record and store calls as .wav files. Record up to 4 hours in one file. Replay recordings on the system or computer.

- Start recording - During an Active call, select **Menu > Start Recording**. The Recording icon displays at the top of the **Call** screen.
- Stop recording - **Menu > Pause Recording > Hang Up**.
- Pause recording - **Menu > Pause Recording**.
- Resume recording - **Menu > Resume Recording**.
- Play recording - Navigate to **Settings > Features > Removable Storage Media > Browse Recordings**. Select a file, **Open > Play**.

Do Not Disturb (DND)

When **Do Not Disturb** is enabled, the phone does not ring, and calls follow the next step in the extension's Find Me/Follow Me rule.

- Enable **Do Not Disturb**, using **one** of the following:
 1. Press **DND** from **Home**.
 2. **Settings > Features > Do Not Disturb > Enable**.
- Disable **Do Not Disturb**:
 1. **Settings > Features > Do Not Disturb > Disable**.

Park a Call

Park, if available, is used to place an Active call on Hold at one extension and pick it up at a different extension.

- **Park** an Active call, press the **Park** soft key.
- Retrieve a parked call, press appropriate line or key.

Voicemail

Navigate to **Settings > Features > Voicemail > Message Center > Connect** and follow the prompts to listen to messages.

Adjust Volume

Press **Volume** during a call to change Active call volume, or when the phone is idle or ringing to change Ringer volume.