![Polycom logo]

L Lync

Polycom® CX3000 IP Conference Phone

Quick User Guide

For use with Microsoft® Lync™.

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About Your Phone

The Polycom CX3000 IP Conference delivers exceptional conference calls in Microsoft Lync environments.
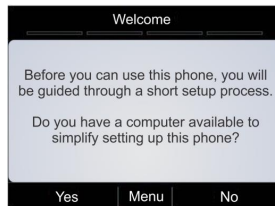
Signing In to the CX3000

You can sign in to the CX3000 phone in Basic or Enhanced mode. Basic mode provides you with access to your contacts, local call logs, and voicemail. Enhanced mode provides you with access to all of the Lync features available for your phone and requires you to connect your phone to your computer and sign in to Lync.

To sign-in using Basic mode:

1 In Desk Phone Setup, enter your phone number or extension and select **Next**.

2 Enter your six-digit PIN number and select **Sign in**.

To sign-in using Enhanced mode:

1 On the Welcome screen, select **Yes**, as shown next.

Welcome
Before you can use this phone, you will be guided through a short setup process.
Do you have a computer available to simplify setting up this phone?
Yes	Menu	No

2 Connect a USB cable from your computer to the USB port on the phone.

3 Press **Sign in** on the phone.

4 Enter to enter your login credentials—username and password—into the Lync client on your computer.

You only need to connect the phone to your computer the first time you sign-in using Enhanced mode.

After you connect your phone to your computer, set your phone as your primary device in the Lync client.

To set your phone as your primary device:

In the Lync client, click **Tools** > **Audio Device Settings**, and select **Polycom CX3000** as your primary audio device.
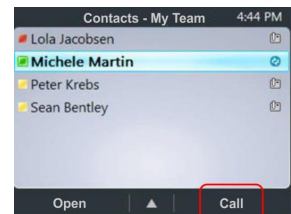
Making Calls

You can make phone calls in the following ways:

• Pick up the handset and dialing a contact.

• Call a contact from the Contact screen.

• Call a contact by searching for a contact using the keypad.

• Call from the Lync client on your computer.

To call from the Contacts screen:

1 From Home, select the **Contacts** icon.

2 From the Contact Groups screen, select the group of a contact.

3 Select a contact, and select **Call**, as shown next.

Contacts - My Team	4:44 PM
Lola Jacobsen	
Michele Martin	
Peter Krebs	
Sean Bentley	
Open	▲	Call

To call by searching for a contact:

1 Enter your contact's name or phone extension using the phone's keypad.

To enter a contact's name, press the numbers on the key pad that correspond to the letters in your contact's name. For example, press 8669*76484 to enter the name Tony Smith using the star key (*) for the space between the first and last name.

2 When you find your contact, select **Call**.

To call from Microsoft Lync:

1 Open the Lync client on your computer, select a contact or search for a contact by name.

2 Click **Call** next to your contact's name, as shown next.

The call displays on your phone and in the Lync client.
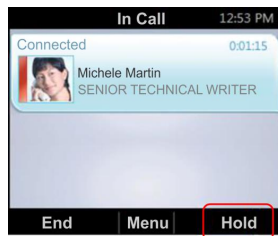
Answering and Holding Calls

You can respond to incoming calls by picking up the handset, selecting **Answer,** or selecting **To Voice Mail** on the Incoming Call screen, as shown below.
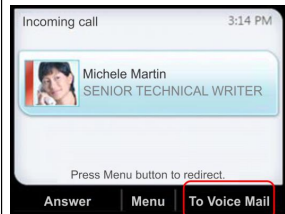
After you answer an incoming call, the call is active. You can place multiple active calls on hold in the In Call screen.

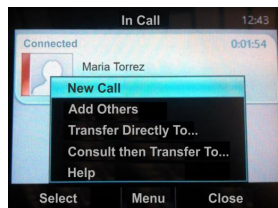**To place an active call on hold:**

» Select **Hold**, as shown next.

To switch between active and held calls:

» Press 🏠 , select **Active Call**, select a held call, and select **Resume**.

You can also make new calls during an active call.

To make a new call during an active call:

1 From the **In Call** screen, select **Menu** > **New Call**. The active call is placed on hold.
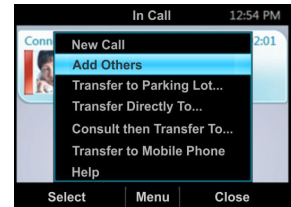

2 Enter a phone number or select a contact and select **Call**.

Managing Conference Calls

You can add multiple participants to an active call to initiate a conference call.

To initiate a conference call:

1 During an active call, select **Menu** > **Add Others**, as shown next. The active call is placed on hold.

2 Enter a phone number or select a contact and select **Add**.
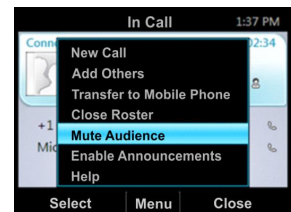
During a conference call, you can mute your audio or mute the audio from the call participants, or audience.

To mute your audio during a call:

» Press 🎤 . Your audio is muted and the call participants cannot hear you.

To mute the audience during a conference call:

Select **Menu** > **Mute Audience**, as shown next. You can no longer hear the audio from the other call participants.

You can also remove a participant from a conference call at any time.

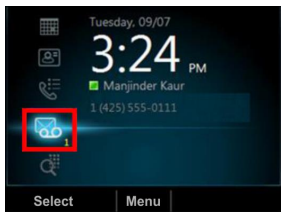**To remove a participant from a conference call:**

1 Select a participant.

2 Press **Menu** > **Remove**, as shown next.

The participant is removed from the conference call.

Checking Voicemail

If you have new voicemail messages, the number of messages displays below the voicemail icon on the Home screen, as shown next.

To check your voicemail:

1 On the Home page, select , or press and hold **1** on the keypad.
The voicemail screen displays with a list of contacts who have left messages.

2 Select a contact and select **Play**.

3 Enter your PIN number to hear the message.

Transferring Calls

You can transfer active calls directly to a contact, to your mobile phone, or to a parking lot on the Lync server. The following are three methods for transferring calls:

- **Transfer Directly To**   Transfer the call directly to a contact without speaking to the contact first.
- **Consult then Transfer To**   Speak with a contact before transferring the call.
- **Transfer to Mobile Phone**   Transfer the call to your mobile phone.

To transfer a call:

1 In the In Call screen, select **Menu**, and select a transfer method. For example, select **Transfer Directly To**, as shown next.
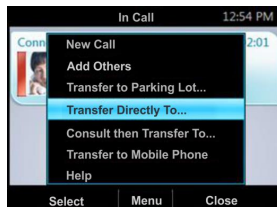
2 Depending on your transfer method, do the following:

➢ For **Transfer Directly To**, enter a phone number or select a contact, and select **Call**.

➢ For **Consult then Transfer To**, enter a phone number or select a contact, select **Call**, and select **Complete Transfer** after you speak with the contact.

➢ For **Transfer to Mobile Phone**, answer the transferred call on your mobile phone. You need to have your mobile number saved on your phone to use this option.

You can also transfer calls to a parking lot that places the call on hold on the Lync server. Calls transferred to the parking lot are

given a retrieval number that any contact can use to retrieve the call from the parking lot.

Transferring calls to the parking lot enables you to remove the call from your line so you can make additional calls or resume a held call.

To transfer a call to a Parking Lot:

1 From the In Call screen, select **Menu** > **Transfer to Parking Lot**.
The call is placed in the parking lot and the In Call screen displays, as shown next.
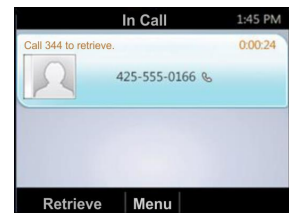
2 Provide a contact with the retrieval number for the parked call. For example, if Sarah needs to retrieve the parked call, instant message Sarah with the **344** retrieval number for the call.

Joining Meetings from the Calendar

You can view your Microsoft® Outlook® calendar and appointments on your phone and directly join meetings from appointments listed on your calendar.

To join a meeting from your calendar:

1 From Home, select the **Calendar** icon .

2 From Today's Calendar, select a meeting and select **Join**, as shown next.

Today's Calendar	2:25 PM
Staff Meeting	⊗
7:00 AM - 8:00 AM	Conference Room 50...
Staff Meeting	
8:00 AM - 9:00 AM	Conference Room 35...
Details Menu **Join**	

Your phone dials into the meeting.

Changing Your Presence Status

Your presence status automatically changes based on your calendar events or phone activity. For example, if you are in a meeting or a call, your presence status displays as Busy on your phone and your Lync client. However, you can change your presence status manually at any time.

To change your presence status on your phone:

1 From Home, select **Menu** > **My Status**.

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2 On the My Status screen, select a presence status, as shown next. The check mark indicates your current status.

My Status	3:01 PM
⊖ Do Not Disturb	
✓ ▪ Available	
▪ Busy	
▪ Be Right Back	
▪ Appear Away	
Reset Status	
Select Menu	

Your new presence status displays on your phone and Lync client.

Viewing Contact Cards

A contact card provides a contact's availability, presence, phone number, schedule information, the most recent call, or a personal note, if available. Note that contacts display in a contact group.
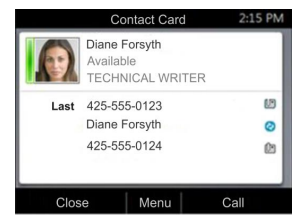
To view a contact card:

1 From Home, select the **Contacts** icon .

2 From the Contact Groups screen, select a contact's group, as shown next.

Contact Groups	3:01 PM
Frequent Groups	
My Team	
Other Contacts	
Personal	
Sales Team	
Select Menu	

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3 Select a contact.
   The Contact Card screen displays, as shown next.

Contact Card	2:15 PM
Diane Forsyth	
Available	
TECHNICAL WRITER	
Last 425-555-0123	
Diane Forsyth	
425-555-0124	
Close Menu Call	

Viewing Call Logs

You can view a history of incoming, outgoing, and missed calls on Call Logs screen.

To view call logs:

1 From Home, select the **Call Logs** icon .

2 From the All Calls screen, select **Menu** and select the call log you want to view. For example, select **View Missed Calls**, as shown next.

All Calls	1:21 PM
View Missed Calls	
View Incoming Calls	
View Outgoing Calls	
Help	
Select Menu Close	

The chosen call list displays.