



Transferring Calls on the Polycom Handset

The Polycom VVX 501 telephone handset built for Skype for Business features a touchscreen that can perform a range of advanced call handling tasks with only one or two quick taps.

The most common advanced feature utilized by University faculty and staff is the blind transfer of a call to a different number. On the old Avaya system, this was performed by depressing the phone's swichhook (or pressing a dedicated transfer key) and then entering the five-digit destination address after a stutter tone. On the Polycom VVX 501 handset, these types of transfers are managed by tapping the buttons on the phone screen, not the phone's keypad.

These instructions cover performing both "blind" and "consultative" call transfers as well as conference calls.

- On a **blind** transfer, the person answering the call transfers it to another extension without checking first to see if the other party is available or wants to take a call. The call rings at the new number and is no longer audible on the original extension. If the call is not answered, it is logged as a missed call at the transferred extension.
- A **consultative** transfer involves putting the incoming caller on hold and ringing a destination person to see if they want to take the call. If yes, the call is transferred away from the person who originally answered the call. If the transferred call is not answered, it is directed back to the original recipient.
- A third option is when the call answerer connects the caller and the destination person but stays on the line to make the introduction. This is essentially a three-way **conference call**.

All of these procedures are documented in the sections below. The last section documents how to change the settings on your VVX 501 handset so that the default transfer mode is blind.

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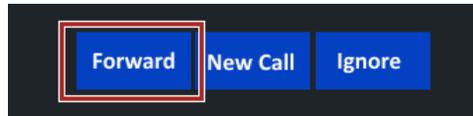
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Transferring a Call (Blind) to Another Number Without Picking Up

The Need: An incoming call rings on your phone. The Caller ID information indicates that the call should be routed to another extension. You don't need to answer the call or check to see if the destination person is available or wants to accept a call.

How to Do It in Three Easy Steps:

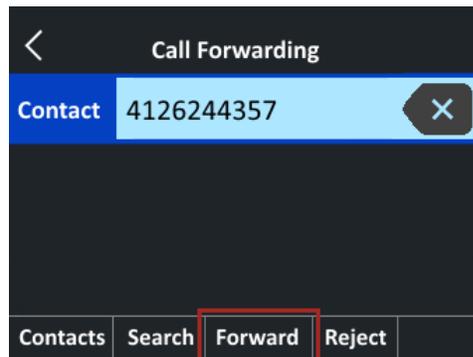
1. Tap the **Forward** button that is visible on the phone screen.



2. Use the phone keypad to enter the five or ten-digit number into the "Contact" field.



3. Tap the **Forward** button.



The call will ring at the destination number and will go to their voicemail (and will be logged as a missed call if they do not pick up).

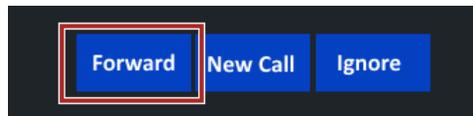


Transferring a Call (Blind) to a Contacts Listing Without Picking Up

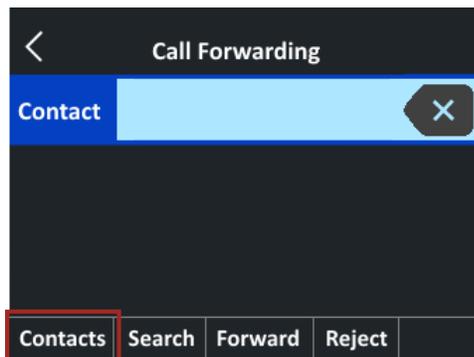
The Need: An incoming call rings on your phone. The Caller ID information indicates that the call should be routed to the extension you are covering. You don't need to answer the call or check to see if the destination person is available or wants to accept a call. You wish to transfer the call to a Skype Favorites or Contacts listing instead of entering in the phone number on the phone keypad.

How to Do It in Four Easy Steps:

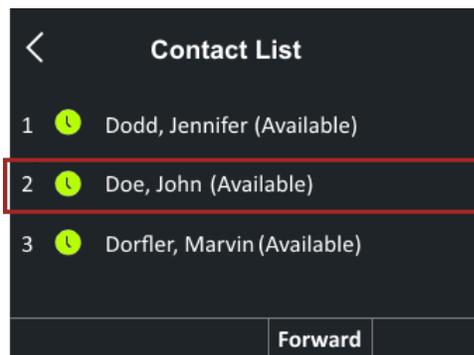
1. Tap the **Forward** button that is visible on the phone screen.



2. Tap the **Contacts** button at the bottom of the "Call Forwarding" screen.

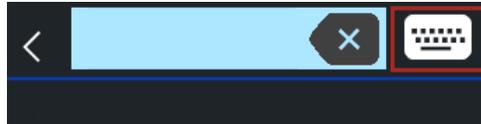


3. A list of forwarding choices will fill the phone screen. These will be pulled from your Skype Favorites list as well as from recent calls. These listings can be names, phone numbers or email addresses. You may have to swipe up and down on the screen to see all of the choices. To select a listing, tap once on it so that it is highlighted.

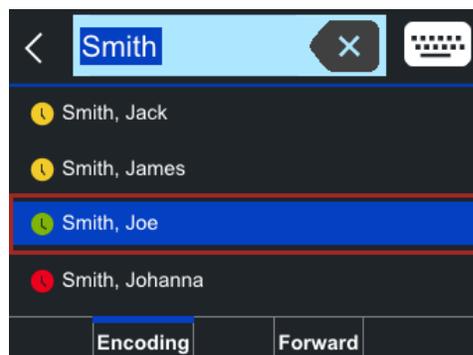


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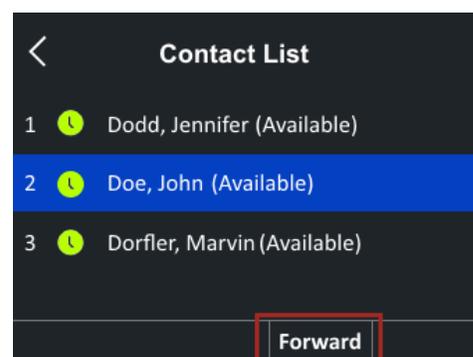
You can also use the **Search** button on the "**Call Forwarding**" screen to look for a contact by last name, email address or username. This will bring up a blank screen with a search field on top. Tap the keyboard icon to the right of the field to bring up a QWERTY display that you can use to enter a name. If you don't see the keyboard icon, tap **ABC**.



Tap the checkmark after you enter a last name, email address or username. The phone will present possible matches from the global University directory on the screen. When you see the listing that you want, tap once on it so it is highlighted.



4. Once you have selected a listing, tap **Forward** to complete the blind transfer.



The call will ring at the destination extension and will go to their voicemail (and will be logged as a missed call) if they do not pick up.

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Transferring a Call (Blind) to Another Number After Answering

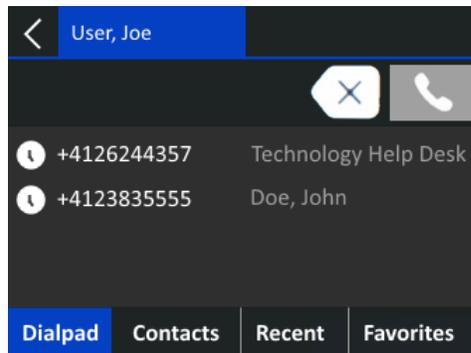
The Need: Once a call has been answered, it needs to be transferred to another number entered on the phone keypad. You don't need to check to see if the destination person is available or wants to accept a call.

How to Do It in Three Easy Steps:

1. Answer the incoming call by picking up the receiver and pressing the **Answer Call** button on the screen if necessary.
2. Press the *and hold* the **Transfer** button that appears at the bottom of the screen...



...until the screen changes. The new screen will feature a black field next to a gray phone icon. Recently-accessed extensions will be listed underneath.



3. Enter the five or ten-digit number where you wish to direct the call using the phone keypad. As soon as you begin entering numbers, the gray phone icon will turn blue. You can tap the phone icon to send the call but the phone will route it anyway about three seconds after you stop entering numbers.



The call will ring at the destination number. If the other party answers, the call will be recorded on their call log. If they do not answer, the call will be logged as a missed call to your number.



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NOTE: If you wish to blind transfer calls with a single tap of the **Transfer** button on the display (without holding it down), you need to change the default transfer type setting on your phone. This procedure is documented in the [last section](#) of this document.





Transferring a Call (Blind) to a Skype Contact After Answering

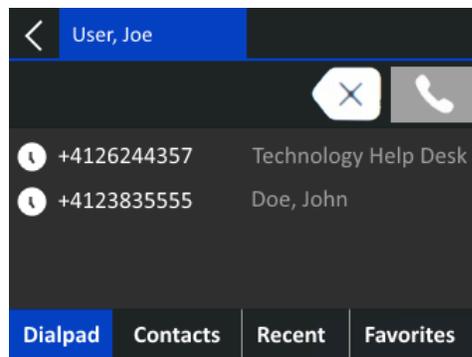
The Need: Once a call has been answered, it needs to be transferred to a listing from your Skype Favorites or Contacts. You don't need to check to see if the destination person is available or wants to accept a call.

How to Do it in Five Easy Steps:

1. Answer the incoming call by picking up the receiver and pressing the **Answer Call** button on the screen if necessary.
2. Press the *and hold* the **Transfer** button that appears at the bottom of the screen...



...until the screen changes. The new screen will feature a black field next to a gray phone icon. Recently-accessed extensions will be listed underneath.

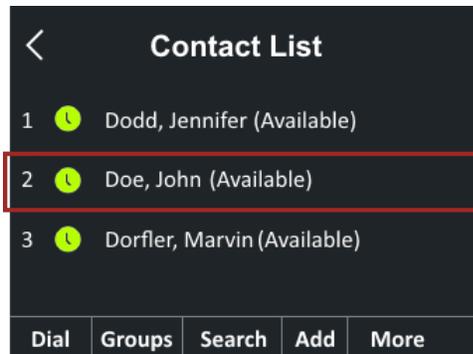


3. Tap the **Contacts** button at the bottom of the phone screen.

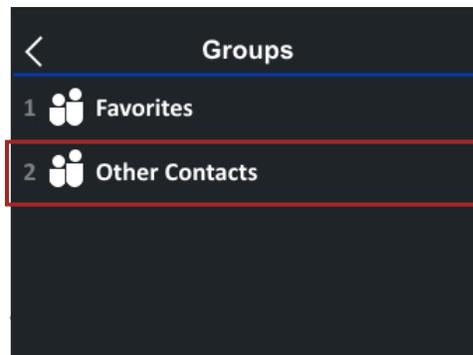


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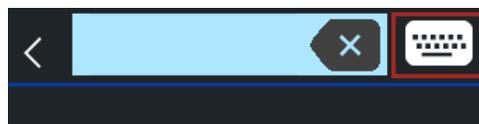
4. A list of contacts will appear on the phone screen. Look for the listing of the destination identity/number where you want to transfer the call. This list will be a combination of your Skype Favorites and your most recently-dialed University extensions. You may have to swipe up and down on the screen to see all of the choices. To select a listing, tap once on it so that it is highlighted.



To see a list of choices pulled exclusively from your Skype Favorites or from your Contacts, tap the **Groups** button and select either **Favorites** or **Other Contacts**.



You can also use the **Search** button on the "Contact List" screen to look for a contact by last name, email address or username. This will bring up a blank screen with a search field on top. Tap the keyboard icon to the right of the field to bring up a QWERTY display that you can use to enter a name. If you don't see the keyboard icon, tap **ABC**.

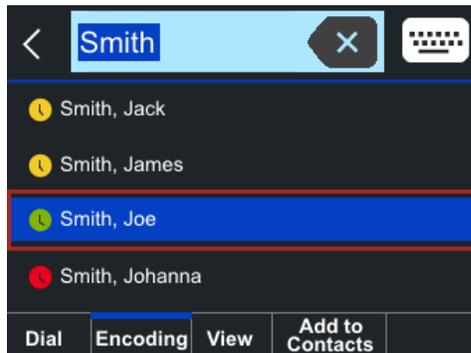




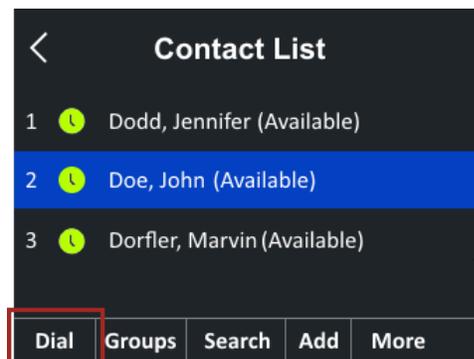
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Tap the checkmark after you enter a last name, email address or username. The phone will present possible matches from the global University directory on the screen. When you see the listing that you want, tap once on it so it is highlighted.



5. Once you have selected a listing, tap **Dial** to complete the blind transfer.



The call will ring at the destination number.

Transferring Calls on the Polycom Handset

Transferring a Call (Consultative) to Another Number

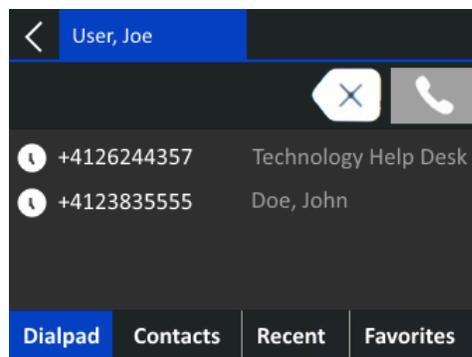
The Need: After a call is answered, it needs to be transferred to another number. However, before you transfer the call, you need to ring the destination extension to make sure that it answers and the person wishes to accept the transferred call.

How to Do It in Four Easy Steps:

1. Answer the incoming call by picking up the receiver and pressing the **Answer Call** button on the screen if necessary.
2. Tap the **Transfer** button that appears at the bottom of the screen.



The new screen will feature a black field next to a gray phone icon. Recently-accessed extensions will be listed underneath.



3. Enter the five or ten-digit number on the phone keypad. As soon as you begin entering numbers, the gray phone icon will turn blue. You can tap the phone icon to send the call but the phone will route it anyway about three seconds after you stop entering numbers.

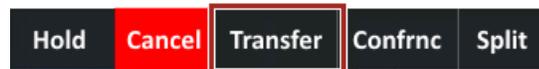




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4. The call will ring at the destination number. When the other party picks up, ask them if they wish to speak with the first caller (on hold). If they say yes, tap **Transfer** at the bottom of the screen.



At this point, the call should be transferred and should no longer be audible on your handset.

NOTE: If you change the default transfer type setting on your phone to "Blind," then you will need to hold down the **Transfer** button at step 2 in order to set up a consultative transfer. The procedure for changing the default transfer type setting on your phone is documented in the [last section](#) of this document.



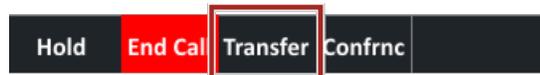


Transferring a Call (Consultative) to a Skype Contact

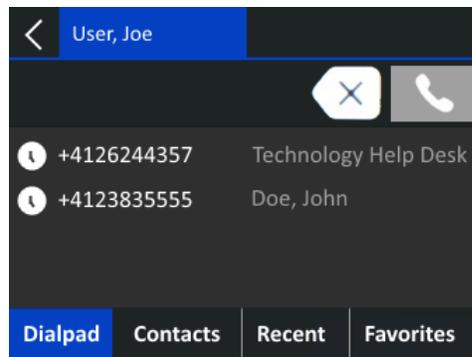
The Need: After a call is answered, it needs to be transferred to a number/account that is listed in your Skype contacts. However, before you transfer the call, you need to ring the destination to make sure that it answers and the person answering wishes to accept the transferred call.

How to Do It in Five Easy Steps:

1. Answer the incoming call by picking up the receiver and pressing the **Answer Call** button on the screen if necessary.
2. Tap the **Transfer** button that appears at the bottom of the screen.



The new screen will feature a black field next to a gray phone icon. Recently-accessed extensions will be listed underneath.

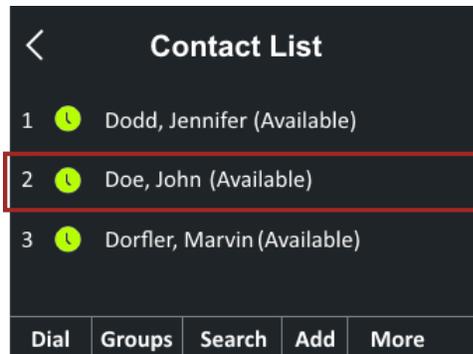


3. Tap the **Contacts** button at the bottom of the phone screen.

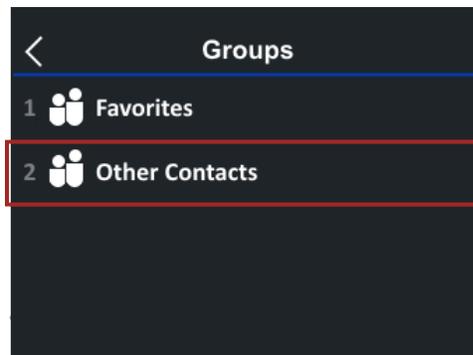


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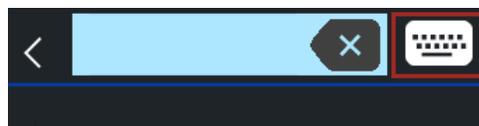
4. A list of contacts will appear on the phone screen. Look for the listing of the destination identity/number where you want to transfer the call. This list will be a combination of your Skype Favorites and your most recently-dialed University extensions. You may have to swipe up and down on the screen to see all of the choices. To select a listing, tap once on it so that it is highlighted.



To see a list of choices pulled exclusively from your Skype Favorites or from your Contacts, tap the **Groups** button and select either **Favorites** or **Other Contacts**.



You can also use the **Search** button on the "Contact List" screen to look for a contact by last name, email address or username. This will bring up a blank screen with a search field on top. Tap the keyboard icon to the right of the field to bring up a QWERTY display that you can use to enter a name. If you don't see the keyboard icon, tap **ABC**.

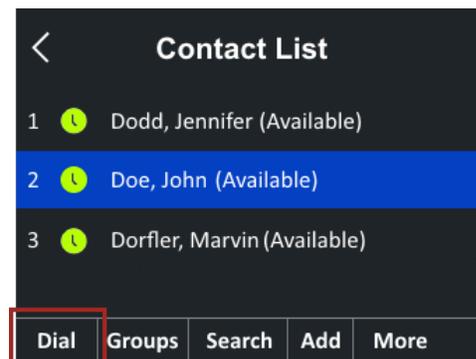


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Tap the checkmark after you enter a last name, email address or username. The phone will present possible matches from the global University directory on the screen. When you see the listing that you want, tap once on it so it is highlighted.



5. Once you have selected a listing, tap **Dial** to complete the consultative transfer.



6. The call will ring at the destination address. When the other party picks up, ask them if they wish to speak with the first caller (on hold). If they say yes, tap **Transfer** at the bottom of the screen.



At this point, the call should be transferred and should no longer be audible on your handset.

NOTE: If you change the default transfer type setting on your phone to "Blind," then you will need to hold down the **Transfer** button at step 2 in order to set up a consultative transfer. The procedure for changing the default transfer type setting on your phone is documented in the [last section](#) of this document.

Transferring Calls on the Polycom Handset

Creating a Conference Call with Another Number

The Need: After answering a call, you decide to transfer it to another number. Except that instead of doing a blind or consultative transfer, you decide to stay on the line long enough to make introductions. These instructions essentially describe how to create a conference call out of what begins as a one-on-one conversation.

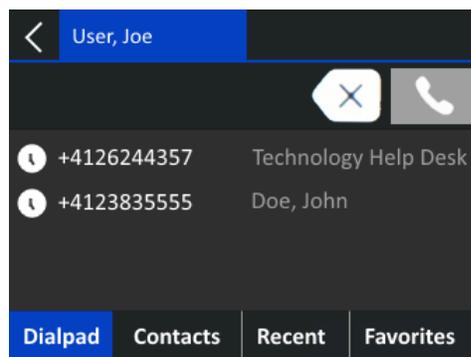
You can repeat these steps to add as many as 249 people to a Skype call. Although if you have a need for more than just a small number of people on a call, consider creating a meeting in Outlook and adding the "Skype Meeting" option.

How to Do It in Two Easy Steps (With a Call Already in Progress):

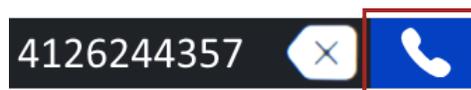
1. Press the **Confnc** button that appears at the bottom of the screen.



The new screen will feature a black field next to a gray phone icon. Recently-accessed extensions will be listed underneath.



2. Enter the five or ten-digit number of the party that you wish to conference with using the phone keypad. As soon as you begin entering numbers, the gray phone icon will turn blue. You can tap the phone icon to send the conference call request but the phone will route it anyway about three seconds after you stop entering numbers.



The call request will ring at the destination number. If the other party answers, the phone will add them to the conference call.



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Creating a Conference Call with a Skype Contact

The Need: After answering a call, you decide to transfer it to another extension from your Skype Contacts or Favorites list. Except that instead of doing a blind or consultative transfer, you decide to stay on the line long enough to make introductions.

These instructions essentially describe how to create a conference call out of what begins as a one-on-one conversation.

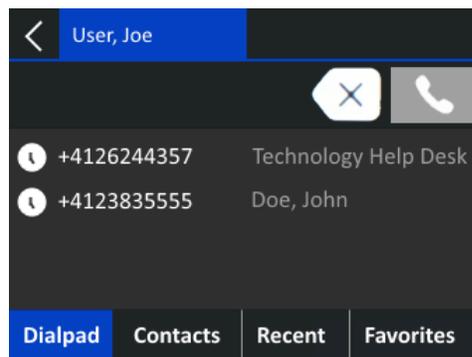
You can repeat these steps to add as many as 249 people to a Skype call. Although if you have a need for more than just a small number of people on a call, consider creating a meeting in Outlook and adding the "Skype Meeting" option.

How to Do It in Four Easy Steps (With a Call Already in Progress):

1. Press the **Confnc** button that appears at the bottom of the screen.



The new screen will feature a black field next to a gray phone icon. Recently-accessed extensions will be listed underneath.

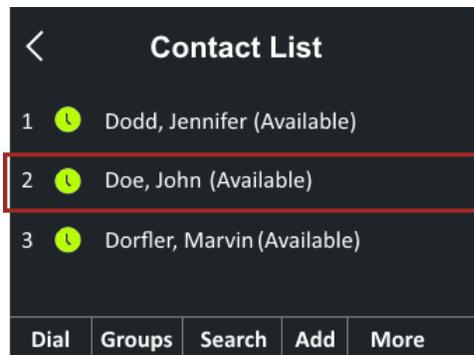


2. Tap the **Contacts** button at the bottom of the phone screen.



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3. A list of contacts will appear on the phone screen. Look for the listing of the destination identity/number that you wish to include in the conference call. You may have to swipe up and down on the screen to see all of your contacts. To select a listing, tap once on it so that it is highlighted.



You can also use the **Search** button on the "Contact List" screen to look for a contact by last name, email address or username. This will bring up a blank screen with a search field on top. Tap the keyboard icon to the right of the field to bring up a QWERTY display that you can use to enter a name.



Tap the checkmark after you enter a last name, email address or username. The phone will present possible matches from the global University directory on the screen. When you see the listing that you want, tap once on it so it is highlighted.

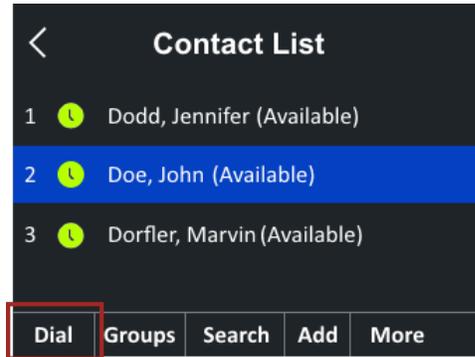




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4. Once you have selected a listing, tap **Dial** to complete the conference call request.



The call request will ring at the destination address. If the other party answers, the phone will add them to the conference call.





Changing the Default Transfer Type to Blind

The Need: You wish to change the default call transfer setting so that you can blind transfer calls with a single tap of the **Transfer** button. By default, you have to hold down the **Transfer** button to get to blind transfer mode.

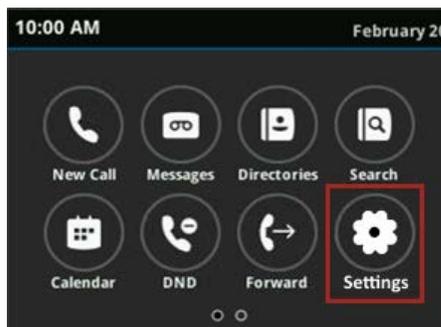
Changing this setting will also change the process for initiating a consultative transfer. Once the change is made, you will have to hold down the **Transfer** button to set up a consultative call transfer.

How to Do It in Five Easy Steps

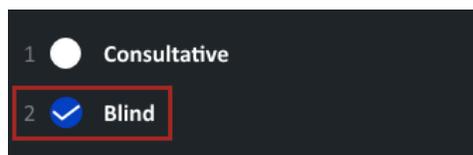
1. Press the Home button on the right side of your phone.



2. Tap the "**Settings**" (gear) icon. You may need to swipe right on the screen to make it visible.



3. Tap **Basic**, and then **Preferences**, followed by **Default Transfer Type** to get to the "Default Transfer Type" screen.
4. Tap **Blind** so that a checkmark appears in the circle next to the text.



5. Press the Home button twice to exit from the Settings menu.