Setting up Skype for Business (for the first time)

Follow these instructions to setup Skype for Business on the Polycom Trio for first time use only:

1. Swipe left on the Home screen
2. Tap Settings
3. Tap Advanced
4. Enter the default password 456 (you may be prompted to change the password)
5. Tap Administration Settings
6. Tap Network Configuration
7. Tap Base Profile
8. Change from Generic to Skype for Business
9. Tap ← and select Save Config
The phone will now reboot

Sign into Skype for Business

When you sign into the Polycom Trio 8800 using your Skype for Business log in credentials, the phone becomes an extension of your S4B profile. From the Home screen:

1. Tap Sign In
You will be presented with two sign in options:
   • User Credentials
   • Web Sign in
2. Complete the following fields:
   • Sign in Address
   • Domain
   • User Name
   • Password
3. Press Sign In
4. You will now be prompted to enter a Lock Code (6-15 numbers)
5. Press Next
6. Re-enter Lock Code
7. Press Next
8. Enter your Sign in details and tap Next
The following screen will now appear which means you are signing into Skype for Business. It will take a few minutes for the Skype for Business menu to display on the phone

User Screens

The Skype for Business Home Screen appears showing your current Presence and displays the following icons: Dial a Number, Meetings, Present, Sign Out, Meet Now and Contacts

Swipe left to view more options
Presence
Your profile will appear on the home screen with a Presence icon indicating your current Skype for Business presence as Available, Away or on a Call.

Contacts
Any contacts you have saved in Skype for Business Favorites will also display on the Home screen along with their presence icon.

To add Contacts as Favorites
In the Skype for Business client on your computer:
1. Right-click on a contact and click Add to Favorites

Add Contacts
You can add your Skype for Business contacts to a Contacts list on your phone:
1. Tap Contacts and Add
2. Enter your contact's email address and press Done and Submit

Call a Skype for Business Contact
To search for a contact while placing a call:
1. Tap the Dial a Number icon
2. Tap the Contacts icon at the top-right of the screen
3. Enter the contact name. A list of matches will appear
4. Select the contact and tap Dial

Dial a Number
To place a call:
1. Tap the Dial a Number icon
2. Enter the number and tap the Call icon, or
3. Tap
4. Tap Dial a Number
5. Enter the number
6. Tap the Call icon

Hold and Resume calls
You can place any active audio or video call on hold, and resume when ready:
1. To hold a call, tap Hold
2. To resume, tap Resume

Blind Transfer to a Skype for Business contact
1. While on an active call, press Transfer
2. Enter the number and tap the Call icon, or
3. Press Contacts at the top of the screen
4. Select the contact and then press Dial

The call will be transferred

Initiate a Conference Call
You can initiate a Skype for Business conference call with Skype for Business contacts or a Skype for Business Contact Group from your phone:
1. Press Meet Now (Starting Conference call)
2. Press Add
3. Select a contact from Contacts directory or enter the contacts number
4. Press Dial
5. Press Add Participant to add additional contacts.

To initiate a conference call with a Skype for Business Group:
1. Press Contacts and Groups
2. Select a group and tap Dial

Forward Calls
You can forward your incoming calls to another contact or to your voicemail.
To forward incoming calls to a contact:
1. Swipe left on the Home screen
2. Tap Settings
3. Tap Features
4. Tap Forward
5. Select Forward to a Contact enter number, tap Done, tap OK, or alternatively select Forward to Voicemail

Join a Scheduled Meeting
The Meetings icon will display on your Home screen. Meeting reminder notifications display on your phone 5 minutes before a meeting starts. You can join the meeting from the Calendar or the meeting reminder.

To join from the Calendar:
1. Tap Meetings
2. Tap Join on your meeting

To join from the Meeting Reminder:
1. When the meeting reminder displays, tap Join

Recent Calls
To view your recent calls:
1. Swipe left on the Home screen
2. Tap Recent Calls
A list of recent calls will now be displayed
3. Tap contact or number to call

Sign Out
To sign out of Skype for Business from your handset:
1. Tap the Sign Out icon
2. When prompted Are you sure?, tap Yes

Present
Use Skype for Business on your laptop to Present (see the Skype for Business User Guide).