

Quick Tips for Using Polycom[®] RealPresence Trio[™] Solution in a Microsoft[®] Lync[®] Environment

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This Quick Tips applies to Polycom[®] RealPresence Trio[™] 8800 conference phones signed into the Microsoft[®] Lync[®] Server 2013.

View the *Polycom RealPresence Trio Solution User Guide* on [Polycom Voice Support](#) for more information on available Lync features.

Sign into Lync

You can sign into your Lync account on the system using your login credentials.

To sign into Lync:

- 1 Tap **Sign In**.
- 2 Complete the required sign-in fields with your login credentials.
- 3 Tap **Sign In**.

Your Lync favorites display on the Home screen, view your Lync contacts in the Contacts list, and view your meetings in the Calendar.

To sign out of Lync:

- » Tap **Sign Out**.

Add Lync Favorites

You can add Lync contacts as favorites to display on the Home screen.

To add Lync contacts as favorites:

- » In the Lync client on your computer, right-click on a contact and click **Add to Favorites**.

Add Lync Contacts

You can add your Lync contacts to a Contacts list on your phone.


To add Lync contacts to your phone:

- 1 Tap **Contacts > Contacts > Search**.
- 2 In the Search field, enter your contact's name.
- 3 Select your contact and tap **Add to Contacts**.

View Lync Contacts' Information

You can view a contact's name, presence status, organization, work number, mobile number, and voicemail from the Contact Details screen.

To view the contact details:

- 1 Navigate to **Contacts > Contacts**.
- 2 Select a contact, tap  and tap **Info**.

Update Your Presence Status

Your presence status information displays your availability and activity to your contacts. Your presence automatically updates when you are actively using the system or it's inactive.

To update your presence status:


- » Navigate to **Settings > Features > My Status** and select your desired status.

You can change your status to Available from any other status by selecting **Reset**.

Initiate a Lync Conference Call

You can initiate a Lync conference call with Lync contacts on the system.

To initiate a Lync conference call:

- 1 Tap **Meet Now > Add**.
- 2 Enter the number for a contact and tap  or select a contact from Contacts or Recent Calls.
- 3 Tap **Add** to add additional contacts.

Initiate a Conference with a Lync Group

You can also initiate a Lync conference call with all Lync contacts in a group.

To initiate a conference call with a group of Lync contacts:

- 1 Tap **Contacts > Contacts > Groups**.
- 2 Select a group and tap **Dial All**.
- 3 Tap **Yes** to confirm you want to dial all contacts in the group.

Each contact in the group is called one at a time.

Join a Scheduled Meeting

A meeting notification displays on the phone 15 minutes before a meeting starts. You can join a meeting from the calendar or the meeting reminder on the conference phone.

To join a meeting from the calendar:

- » Tap **Calendar** and tap **Join** for your meeting.

To join a meeting from the meeting reminder:

- » When the meeting reminder displays, tap **Join**.

Forward Calls

You can forward your incoming calls to another Lync contact or to your voicemail.

To forward incoming calls to a contact:

- 1 Navigate to **Settings > Features > Forward > Forward to Contact**.
- 2 Enter your contacts number and tap **OK**, or tap **Contacts**, choose a contact, and tap **Forward**.

To forward incoming calls to voicemail:

- » Press **Forward > Forward to Voicemail**.

Search for Lync Contacts

You can search for Lync contacts in the Contacts list on the system.

To search the Lync Directory:

- 1 Select **Contacts > Contacts**.
- 2 Enter your contacts first or last name. The search automatically displays search results.

You can call contacts or add them to your Contacts list.

To call contacts from a Lync Contacts search:

- » Select your contact then tap **Dial**.


To save a contact from a Lync Contacts search:

- » Select your contact then tap **Add to Contacts**.

Show Content during Video Calls

When a RealPresence Trio Visual+ is connected to a monitor and paired with RealPresence Trio 8800, you can show content during Lync video calls using the Lync client.


To show content during a video call:

- 1 Tap **Add** on the RealPresence Trio 8800 and enter your Lync username (username@domain.com).
- 2 Answer the call in the Lync client on your laptop.
- 3 In the conversation window, click  and choose how you want to show content.

Show Content during a Lync Online Meeting

When you join a Lync Online Meeting from the RealPresence Trio 8800, you can show content by joining the meeting from the invite on your laptop.


To show content during a Lync Online Meeting:

- 1 On your laptop, open the meeting invite and click **Join Lync Meeting**.
- 2 In the conversation window, click  and choose how you want to show content.

Show Content when Not in a Call

You can show content during in-person meetings when you're not in an audio or video call using the Lync client.

To show content when not in a call:

- 1 In the Lync client, enter the name of the conference room in the Search field, right-click on the conference room, and click **Send an IM**.
- 2 In the conversation window, click  and choose how you want to show content.