



# 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.