



Before the Installation

Review End User Training Packet

Login to Web Portal with End User Credentials

Web Portal Username _____

Web Portal Default Password _____

New Web Portal Password _____

1. Go to tdsmanagedip.com.

2. Enter Username and Default Password.

3. You will be prompted to change password.

Must be a minimum of 8 characters in length, cannot contain your login ID, cannot be the old password (or reverse), must contain 1 number, must contain 1 upper case and 2 lower case alpha characters.

4. Enter **new** web portal password and click **Save**.

Complete the section "To install the toolbar" on page 4 of training packet

Listen to saved messages in current voice mail system

Note: Old messages will not be available after the installation of new phone system

Day of Installation

Attend TDS training session and bring the End User Training Packet

Setup Voice Mail with End User Credentials

Voice Portal Number _____

Voice Portal Default Password _____

New Voice Portal Password _____

1. Press the **Messages** hard key or touch the **Envelope** soft key (Depending on phone model).

2. Enter the default password followed by #.

3. You will be prompted to change password.

Must be a minimum of 5 characters in length, maximum of 8, cannot be a single repeated digit, sequential numbers, repeating sequences (i.e. 11111, 12345, 121212), cannot be or contain the user's phone number or extension (or reverse), cannot be the old passcode (or reverse).

4. Enter the **new** voice portal password.

5. Record your name.

6. Setup *No Answer Greeting* (Callers hear when a call is rejected or phone is not answered).

7. Setup *Busy Greeting* (Callers will hear when Do Not Disturb is on).

Note: If no greetings are recorded, callers will hear the system default greeting

8. Create contact in cellphone of Voice Portal number to access or update when out of the office

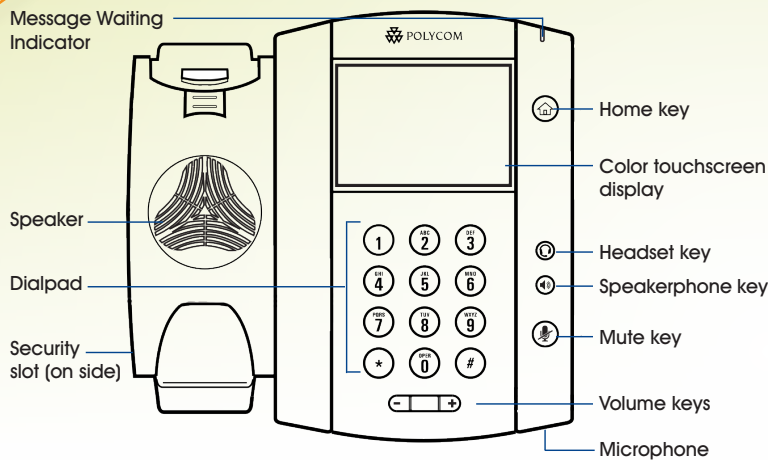
Complete page 3 of training packet - Web Portal/Toolbar Quick Start

Complete the section "To activate the toolbar" on page 4 of the training packet



TDS® managedIP Hosted

Polycom WX500 Quick Start



Call Handling

To answer a call

- Pick up handset or
- Touch **'Answer'** soft key or speakerphone key

To answer when on an active call

- Select the call
- Touch **'Answer'** soft key
- First caller will be put on hold

To place a call

- Dial number, pick up handset or
- Dial number, touch **'Green Phone'** soft key or
- Pick up handset, dial number, touch **'Green Phone'** soft key

To place a call on Hold and Resume the call

- Touch the **'Hold'** soft key
- Touch the **'Resume'** soft key

To park a call

- Touch **'Park'** soft key
- Dial **extension** to park call against
- Touch **'Enter'** soft key

To retrieve a parked call

- Touch **'More'** soft key
- Touch **'Retrieve'** soft key
- Dial **extension** call is parked against
- Touch **'Enter'** soft key

Feature	Code
Call Pick-Up - longest ringing call	*98
Call Return	*69
Calling Line ID Blocking	*67
Push to Talk	*50
Group Call Park	#58

Transfer

To place a consultative/warm transfer

- Touch **'Transfer'** soft key
- Dial 2nd number, touch **'Green Phone'** soft key
- Announce the caller
- Touch **'Transfer'** soft key

To place a blind transfer

- Touch **'Transfer'** soft key
- Touch **'Blind'** soft key
- Dial 2nd number
- Touch **'Green Phone'** soft key

To transfer directly to voicemail

- Touch **'Transfer'** soft key
- Touch ***55**
- Dial **extension** followed by the **'#'** key

Conference

To place a conference call

- Touch **'Confrc'** soft key
- Dial 2nd number, touch **'Green Phone'** soft key
- Touch **'Confrc'** (Appears when 3rd party answers)
- All parties are together

Voice Message Retrieval

To retrieve a voice message

- Press the **'Envelope'** soft key and follow the menu

Play Message	1
# Save	6 Jump to End
1 Rewind	7 Delete Individual Message
2 Pause/Resume	9 Additional Options
3 Skip Forward	1 Reply to Message
4 Jump to Beginning	2 Forward Message
5 Play Message Envelope	
Change Busy Greeting	2
Change No Answer Greeting	3
Compose Message	5
Delete All Messages	7
Return to Previous Menu	*
Repeat Menu	#

1-866-9-TDSBIZ
tdsbusiness.com



Web Portal

To login to the Web Portal






1. Go to tdsmanagedip.com.
2. Enter User ID.
3. Enter **new** web portal password.

To configure basic Web Portal settings

1. Go to the Profile Page.
 - Verify Name is how you want it to appear in the Group Directory
 - Enter email address where you desire web portal password resets to be sent
 - Enter cell phone number (with no dashes)

To configure calling feature settings

1. Hover over Calling Features and click **All Services**.
2. Program desired features, most popular outlined below.

Feature	Feature Description	Toolbar Icon
Call Forward Always	Enter number (with no dashes) calls should forward to when this feature is activated	
Call Forward No Answer	Enter the number of times the phone will ring before it goes to Voice Messaging	
Simultaneous Ring	Enter number that should ring at the same time the desk phone rings (Premium Users Only)	
Personal Phone List	Enter personal contacts that can be called with the Click to Dial feature on the toolbar	
Speed Dial 8/100	Enter contacts that can be called with the Click to Dial feature or speed dialed from the phone	
Remote Office	Populate telephone number of remote location (Premium Users Only)	
Aliases	Enter numbers that the Voice Portal will recognize as the User and not ask for mailbox ID	
Voice Management	Make selections on how to receive voice messages (wav file in email, phone, both)	
Voice Portal	Disable voice message password if desired by checking Auto Login	

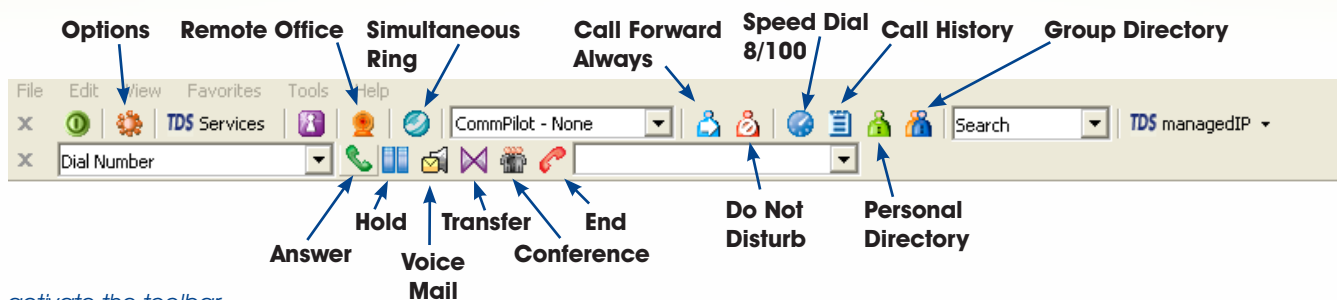
Visit the Support Site for User Guides, Training Videos, & other resources at support.tdsmanagedip.com



Toolbar Installation

To install the toolbar

1. Log out of all applications.
2. Open a web browser and go to support.tdsmanagedip.com/hosted/
3. Click **Download** in the toolbar section.
4. The toolbar installation will be displayed. Click **Run** to install.
5. Click **Run** to verify the installation.
6. Click **Next** to continue installation.
7. Click **Next** to select the default Destination Folder.
8. Click **Next** to select the Complete Installation Type.
9. When the installation is successfully completed, click **Finish**.



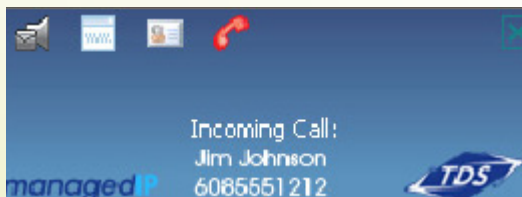
To activate the toolbar

1. Click the **Options** button on the toolbar.
2. From left menu, Click **Account**.
3. Enter your Username and new web portal password.
4. Check the boxes to *Save Username* and *Save Password*.
5. From left menu, Click **General**.
6. Check box to *Auto login when connected to network*.
7. Click **Apply**.
8. Click **OK**.

Call Notification (Web Screen Pop-Up)

To handle incoming calls with pop-up notification

- Click on the caller's **Name & Phone Number** in the pop-up to answer hands free or with headset
- Click **Grey Envelope/Speaker** icon to transfer the call immediately to voice mail
- Click **Business Card** icon during a call to save the caller's information as a vCard in Outlook
- Click **Red Phone** icon to silence the phone and transfer caller to voice mail upon completion of ring cycle



To disable web screen pop-up notification

1. Click **Options** icon on the toolbar.
2. Click **General** and check *Hide call notifications*.
3. Click **OK**.