

OVERVIEW & REQUIREMENTS

This guide explains how to configure the **Poly Trio 8300** smart conference phone to register with the PBX, using either manual configuration or auto provisioning.

IDENTIFY YOUR PHONE MODEL

Check the label on the back of the phone to confirm the exact model. Polycom models can differ in requirements and setup procedure — confirming the model first avoids failed registrations.

PHONE FIRMWARE

- Required firmware version: **7.0.0.4265**.
- To check: press **Home**, then go to **Settings** → **Status** → **Platform** → **Application** → **Main**. The firmware is displayed under **Version**.

DHCP SERVER

A fully configured and operational DHCP server on the network.

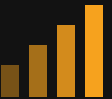
PBX VERSION

A PBX version **5.3.9** or newer is required.



CHECKING THE PBX VERSION

Log in to the PBX and navigate to **Settings** → **About**. The top of the About page shows a line similar to **Edition: Multi-Tenant Release: 5.3.9.0** — **Release** denotes the current version.



INSTALLATION

POWER ADAPTER

- Connect the DC plug on the power adapter to the DC port on the phone, and plug the other end into an electrical outlet.
- Connect the Ethernet cable between the **Internet** port on the phone and a network port on your router or switch.

POWER OVER ETHERNET (POE)

- Using a regular Ethernet cable, the phone can be powered directly from a PoE-compliant router or switch.
- Connect the Ethernet cable between the **Internet** port on the phone and an available port on the in-line power switch.

NOTE: If you are using Power over Ethernet, do not connect the AC adapter. Make sure the Ethernet cable and the router or switch are PoE compliant.

FIND THE PHONE IP ADDRESS

Press **Home**, then go to **Settings** → **Status** → **Platform** → **Phone**. The IP address is displayed at the top of the screen.

RESET TO FACTORY SETTINGS

Not required for brand-new phones — but if the phone has been used before, a factory reset is a must.

FROM THE PHONE

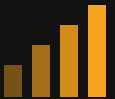
- Press **Home**, go to **Settings** → **Advanced**, and enter the password (default: **456**).
- Go to **Administration Settings** → **Reset to Defaults** → **Reset To Factory** and press **Select**.
- Allow time for the device to reboot.

NOTE: Do not unplug or remove power from the phone while it is updating firmware and configuration.



Poly Trio 8300

PHONE CONFIGURATION GUIDE



MANUAL CONFIGURATION

1 · UAD SETTINGS

- Browse to the PBX (example: `http://192.168.1.10`) and log in with your e-mail address and password.
- Navigate to **Settings** → **UAD** and make sure the Polycom UAD is enabled — click the **edit** icon for your Polycom phone.
- Set **Status = Active**, **Auto provisioning = No**, **DHCP = Yes**.
- Click **Save**.

2 · CREATING THE EXTENSION

- Navigate to **Extensions** and click **Add Extension**.
- Select the Polycom phone model in the **UAD** select box.
- Select Location: **Local** (LAN) or **Remote** (WAN/Internet), then click **Next step**.
- Enter **Name** (e.g. John Smith), **E-mail** (e.g. john.smith@yourdomain.com — receives system notifications), and **Department** (e.g. Sales), then click **Save**.

NOTE: Depending on the Polycom device and its firmware, the web interface settings may vary.

UAD SETTINGS — MANUAL CONFIGURATION

ADD EXTENSION



REGISTERING THE DEVICE

METHOD A — WEB INTERFACE (SIMPLE SETUP)

Find the phone IP (**Home** → **Settings** → **Status** → **Network** → **TCP/IP Parameters**), browse to it, and enter the password (default: **456**). Then select **Simple Setup** and enter:

SIP Server → Address	The PBX IP address. Example: 192.168.1.10
SIP Server → Port	5060
IP Line Identification → Address	The Extension number. Example: 1003
Authentication User ID	The Extension number.
Authentication Password	The Extension Secret from the extension e-mail. Example: %3DfChBz59

Press **Save**. The phone registers after a few seconds — if not, reboot the phone.

METHOD B — ON THE PHONE

Line configuration:

- **Home** → **Settings** → **Advanced** — enter password (default **456**).
- **Administration Settings** → **Line Configuration** → **Line 1**.
- **Address** — enter the Extension number (e.g. **1003**).
- **Authentication** → **User ID** — the Extension number; **Password** — the Extension Secret.
- Press **Back** three times, then **Save Config**.

Call server:

- **Home** → **Settings** → **Advanced** (password **456**) → **Administration Settings** → **Call Server Configuration** → **SIP** → **Server 1**.
- **Address** — enter the PBX IP address (e.g. **192.168.1.10**).
- Press **Back** three times, then **Save Config**.

Dial ***123** to verify registration.

AUTO PROVISIONING — SETUP

1 • UAD SETTINGS

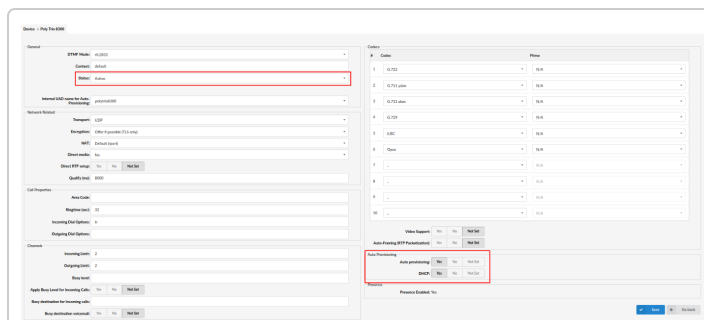
- Log in to the PBX and navigate to **Settings** → **UAD**.
- Edit the Polycom UAD and set **Status = Active**, **Auto provisioning = Yes**, **DHCP = Yes**.
- Click **Save**.

2 • CREATING THE EXTENSION

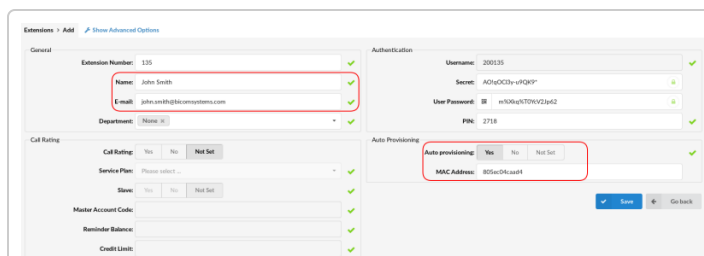
- Navigate to **Extensions** → **Add Extension**, select the Polycom model and Location, then click **Next step**.
- Enter **Name** and **E-mail** as usual, then set:
- Auto Provisioning = Yes**.
- MAC Address** — found on the label on the back of the phone.
Example: **001565FF1536**.
- Click **Save**.

3 • DHCP (OPTION 66)

Make sure your DHCP router uses **option 66** to automatically hand phones the auto-provisioning URL. Provisioning runs at first boot or on a user-initiated reboot — the DHCP server tells the phone where to pick up its configuration file. Dial ***123** to verify registration.



UAD SETTINGS — AUTO PROVISIONING



EXTENSION — AUTO PROVISIONING & MAC ADDRESS

AUTO PROVISIONING — TFTP, HTTP & HTTPS

PHONE-SIDE PROVISIONING SETUP

- Browse to the phone IP (example: `https://192.168.1.22`), enter the password (default **456**) and press **Submit**.
- Click the **Settings** tab, then **Provisioning Server**.
- Choose the **server type**: HTTP, HTTPS, or Trivial FTP. **HTTP is recommended**.
- Enter the Auto Provisioning username and password into the **User Name** and **Password** fields.
- Click **Save** and confirm with **Yes**; allow the phone to reboot. The phone picks up its configuration file from the PBX during reboot.

PROVISIONING ADDRESS FORMATS

For **HTTP / HTTPS**, enter the protocol, then the hostname or IP, then **/prov**:

```
http://pbx.yourdomain.com/prov
https://pbx.yourdomain.com/prov
http://192.168.1.10/prov
https://192.168.1.10/prov
```

For **TFTP**, enter **tftp://** followed by the hostname or IP:

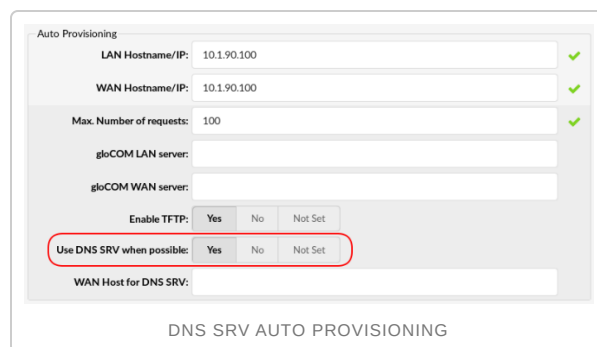
```
tftp://pbx.yourdomain.com
tftp://192.168.1.10
```

AUTO PROVISIONING — DNS SRV

PROVISIONING VIA DNS SRV

A DNS SRV record can specify the location of the PBX. The DNS server must be configured correctly for this to work — your service provider can assist with this setup.

- In the PBX, navigate to **Settings** → **Servers**, click **Edit**, and in the **Auto Provisioning** group set **Use DNS SRV when possible** = **Yes**, then **Save**. *You must re-save all extensions configured for auto provisioning.*
- On the phone: **Menu** → **Settings** → **Advanced** (password **456**) → **Admin Settings** → **Line Configuration** → **Line 1** → **Server 1**.
- **Address** — enter the PBX Hostname (example: `pbx.yourdomain.com`). The DNS server must route registration to the PBX even if it lives under another domain.
- **Authentication** → **User ID** — the Extension number (e.g. **1003**); **Password** — the Extension Secret (e.g. `%3DfChBz59`).
- Press **Back** twice, then **Save Configuration**. The phone pulls its configuration during reboot. Dial ***123** to verify.



The screenshot shows the 'Auto Provisioning' configuration page. It includes fields for LAN Hostname/IP (10.1.90.100), WAN Hostname/IP (10.1.90.100), Max. Number of requests (100), gLoCOM LAN server, and gLoCOM WAN server. There are three rows of radio buttons for 'Enable TFTP' and 'Use DNS SRV when possible'. The 'Use DNS SRV when possible' row has 'Yes' selected. Below these is a field for 'WAN Host for DNS SRV'. The page is titled 'DNS SRV AUTO PROVISIONING' at the bottom.