# Telair Hosted Voice

# uPBX Cloud Telephony Administrator Guide

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### Notice For uPBX

*Please be advised as uPBX shares the same family of technology as MyCloud PBX. As such, common features like the MyCloud portal and URLs will be used for both products e.g.* **ps.mycloudpbx.com.au.** *Please note that this is correct and should not be changed.*

# Features

## Feature Overview

### Multiple Offices
*Create individual offices each with their own operating hours and caller ID.*

### Smart Calling
*Never miss a call again by forwarding calls to your mobile and your extension simultaneously.*

### Auto Provisioning
*Automatically configure and update handset configurations across an entire organisation from one central location.*

### Voicemail/Voicemail to Email
*Voicemail is stored in the cloud and can be sent as an email attachment.*

### Call Security
*Limit International and premium service calls based on user profile.*

### Direct Inward Dialling
*Map external numbers directly to an individual extension.*

### Day/Night Conditions
*Configure day/night conditions placing the system into night mode automatically.*

### Ring Groups
*Set a group of phones/extensions to ring when a call is received.*

### Call Transfer
*Transfer calls between extensions or to external numbers.*

### Virtual Extension
*Map a commonly dialled number to a virtual extension allowing you to call external numbers just as if they were extension on the PBX.*

### Valet Parking
*Calls can be placed in a valet park slot and retrieved from another extension.*

## User Interface Overview

**1.  Offices & Users**
Add/create or edit an Office or User.

**2.  Call Routing**
Setup Call Routing.

**3.  Day/Night**
Configure the opening hours of the office.

**4.  Holidays**
Configure when the office will be closed for a holiday.

**5.  Ring Groups**
Set a group of phones/extensions to ring when a call is received.

**6.  Call Queues**
Inbound calls are "queued" and sent to an available "agent".

**7.  Valet Parking**
Use Valet Parking to place a call on hold whilst you continue to call or answer another number. The call can be retrieved from another extension.

**8.  Recorded Sounds**
Upload and configure a recording.

**9.  Music on Hold**
Upload and configure the Music on Hold used throughout the system.

**10. Announcements**
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**11. Virtual Extensions**
Virtual Extensions are actions that have been assigned a number, calling the assigned number will execute the action.

**12. Blacklist**
Block numbers from calling your PBX, useful for stopping nuisance callers (e.g. telemarketers).

**13. Auto Attendant**
Virtual receptionist for your PBX (also known as IVR), route calls to different departments without user intervention.

**14. Reporting**
Analytics and raw call data.

**15. Call Data**
Itemised billing information.

**16. Add-ons**
Enable/Disable or Manage PBX add-ons

**17. Apply PBX Changes**
After making a configuration change click "Apply PBX Changes" to update the running configuration.

## Offices and Users
## Offices

Offices are used to group users that share configuration settings such as caller ID, area code or time zone. Offices are not tied to a geographical location, however, grouping users based on their location can be useful for administrative purposes.



| | | | | | | |
|---|---|---|---|---|---|---|
| | Offices: | | | | | 1 |
| | | | | | Add Office | |
| **Ashgrove** | | | | ⚙ 2 | ➕ 3 | 🔽 |
| Default Phone: 0731051301  Default Area Code: 07  Timezone: GMT+10:00  Hold Music: Default | | | | | | |
| **Toowong** | | | | ⚙ | ➕ | 🔼 |
| Default Phone: 0731051300  Default Area Code: 07  Timezone: GMT+10:00  Hold Music: Default | | | | | | 4 |
| **302 (Mark)** | | | | | | ✖ |
| **303 (Chris)** | | | | | | ✖ |
| **305 (Simon)** | | | | | | ✖ |

| | |
|---|---|
| **1.** | **Office**<br>Offices are used to define groups of extensions with common configuration for example outbound number, area code and operating hours. |
| **2.** | **Office Settings**<br>Configure the global office settings including outbound call ID, time zone and hold music. |
| **3.** | **Add User**<br>Add a new user extension to the office. |
| **4.** | **Office Details**<br>Shows the current office default details.<br>Call ID: The default number presented on outbound calls.<br>Area Code: Default area code used when 8 digit numbers are dialled.<br>Time zone: Local time zone used to set local time on auto-provisioned handsets.<br>Hold Music: Hold music stream used by this office. |

## Users

Each user on the system is assigned an extension number. When calling this user internally the caller will dial the extension number to speak to that user directly. To dial the extension directly from an external number a direct indial number must be configured. If a user is configured to be a member of a ring group than the ring time (seconds) field will be ignored and instead the phone will ring for the time specified within the ring group.



| | |
|---|---|
| 1. **Extension Number**<br>Enter a 3 or 4 digit extension number. See 'Numbering Plan' for best practice. | |
| 2. **Name**<br>Name used to identify the extension & displayed on auto-provisioned phones. | |
| 3. **Password**<br>Password for the extension. Use the arrow button to generate. | |
| 4. **Ring Time**<br>Default ring time before forwarding the call to voicemail. | |
| 5. **Office/Location**<br>Current office user is assigned too. To move a user, select office from drop down. | |
| 6. **Outbound Caller ID**<br>Specify the outbound caller ID presented on outbound calls. | |
| 7. **Pickup Group**<br>A pickup group lets other members of that pickup group answer a call even if they are not part of the same Ring Group. A Pickup Group should be configured before a Ring Group. | |
| 8. **Extension Behind Firewall**<br>Enable firewall compatibility for phones connecting behind a firewall. | |

**9. Current Routes**
Routes used by this extension.

**1.** *See* **Auto Provisioning.**

**1. Enable Direct Dialling**
Select an available number from the list to create an inbound route direct to this user.

| |
|---|
| **1. Smart Call Timeout (seconds)**<br>Set the timeout, in seconds, before the Smart Call Number is dialled. |
| **2. Smart Call Type**<br>Sequential: Call is received on the desk phone, if not answered after the timeout the call is transferred to the "Smart Call Number"<br>Parallel: Call is received on both the desk phone and "Smart Call Number".<br>Parallel Delayed: Call received on desk phone then after timeout to the "Smart Call Number". |



| |
|---|
| **1. Enabled Calls**<br>Set the timeout Local: local calls only (based on office area code)<br>National: Australia wide calls.<br>Mobile: Australian based mobile numbers.<br>International: 0011 International calls.<br>Premium: Premium service numbers (19xx number for example)<br>Other: Other numbers including 13, 1300 numbers. |
| **2. Update Settings via Handset**<br>Allow the user to update settings via the handset. A practical example of this is allowing a user to use Dial Codes. |
| **3. Toggle Day/Night Mode**<br>Allow the user to update the day/night modem using the handset. |

> **4. Update Recordings via Handset**
> Allow the user to update system recordings using the sound recording system on a handset.

## Call Routing

Each time a call enters the phone system the destination number is matched against the list of configured inbound routes. Once a destination is matched the call will continue along what's known as a "call flow".

As call routes are sent to a destination you will typically need to setup the "destination" (for example handsets, Day/Night condition, announcements, recorded sounds, IVR, etc.) before creating the route. Configuring the call route is typically the last step taken when creating a new call flow within a PBX. Typically a Call Route will use a Day/Night condition or Holidays condition as its next activity type, for example.



> **1. Phone Number**
> List of phone numbers available to select from.

> **2. Time Zone**
> Time zone observed by this route.

> **3. On Hold Music**
> Ringing: Standard "ringing" sound is played to replicate a traditional call.
> Default: Calls inbound to this number will play the default on-hold music.

> **4. Call Alert Name**
> Visual alert shown on compatible phone handsets during an incoming call.

| | |
|---|---|
| 1. | **Enable Virtual Fax**<br>Tick this option to activate Virtual Fax. Virtual Fax allows for a fax to be received electronically to nominated email addresses. |
| 2. | **Email Address**<br>Enter the nominated email address, or addresses, to which an electronic fax will be delivered. |



| | |
|---|---|
| 1. | **Enable Holiday**<br>Select a holiday condition from the drop down list. Holiday conditions are configured using the Holiday screen. A single holiday condition can be used for multiple inbound routes. |



| | |
|---|---|
| 1. | **Caller Passcode**<br>Selecting this option will activate Caller Passcode. An example of using Caller Passcode is when configuring a Call Route for conference calls. To restrict who is allowed to participate on the conference call, activate Caller Passcode. Only people with the passcode will be allowed to dial in to the conference. |
| 2. | **Passcode**<br>Nominate a passcode to use. Further to the above example, this is the passcode users will need to dial to enter the conference call. |

| 1. | **Emergency Extension List** |
|---|---|
| | Select up to 3 extensions to be monitored. Monitored extensions are used to determine if a site is "online". If a site is determined to be "offline" call routing will be dynamically updated using the "Emergency Activity". |
| 2. | **Emergency Activity Type/Emergency Activity** |
| | Select the emergency activity routing type and destination. |



| 1. | **Emergency Email** |
|---|---|
| | In the event the Emergency Activity is used an email alert will be sent on the first use of the emergency route. Further emails will be sent every 10 minutes until the emergency extensions are registered. |



| 1. | **Enable Forward All** |
|---|---|
| | Selecting this option enables Forward All. Using Forward All allows all incoming calls to that call route to be forwarded to a specific Extension, Virtual Extension, or External Number. Only handsets with the ability to update settings via the handset (as configured in offices and users) are capable of using this Dial Code. |
| 2. | **Allocated Dial Code** |
| | The allocated Dial Code is used to enable or disable call forwarding via the handset. |

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| | |
|---|---|
| **1. Activity Type** <br> The Activity Type is the next activity that will be taken when a call enters the call route and has passed the initial holiday and emergency routing conditions. | |
| **2. Activity** <br> Further to the Activity Type, the "activity" option can be enabled in some instances where further customisation of the activity type is required. For instance, when selecting the Advanced Day/Night Control activity type the activity allows the user to specify which Day/Night condition to use as the next step in the call flow. | |
| **3. "Next Activity" Cog** <br> This cog will take the user directly to the configuration page for the corresponding activity. In this instance, it would take the user to the configuration page for the selected Day/Night condition. | |

## Day/Night

Day/Night mode allows for the configuration of office hours. It can be set to automatically detect transitions between configured day time and night time hours, or, a dial code can be used to switch between day/night modes. It is possible to forward calls to specified numbers when night mode is activated. Multiple Day/Night configurations can be created on a single Call Route, allowing for extensive control over how a call is routed on each day of the week during different hours of the day.



| 1. | **Name** |
|---|---|
| | Day/Night condition name, this will be used to identify this condition throughout the PBX options. |
| 2. | **Allocated Dial Code** |
| | Short code assigned to the Day/Night condition, dial this code to enable/disable the condition "ad-hoc". Only handsets with the ability to update settings via the handset (as configured in offices and users) are capable of using this Dial Code |
| 3. | **Automatically detect Day/Night** |
| | Set an automatic day/night schedule. Setting the schedule will place the office in day or night mode automatically at the specified times. |
| 4. | **Time** |
| | Enter the open/close times in 24 hour format. |

☐ Allow Night mode configuration in **Real-time** **1**

In this scenario calls will be forwarded to a specified phone number when entering Night mode. To specify this phone number dial **\*907** and follow the prompts.

| | |
|---|---|
| **1.** | **Allow Night Mode Configuration in Real-time**<br>Enable/disable night mode configuration using the allocated dial code, as well as forward all incoming calls to the allocated number. |

Day Activity Type   **1**
Announcement ▼
Day Activity
Initial Greeting ▼ ⚙

Night Activity Type   **2**
Choose... ▼
Night Activity
▼

| | |
|---|---|
| **1.** | **Day Activity Type**<br>Select a Day Activity Type. An Activity Type is a function that will execute when the condition (day time) is met. |
| **2.** | **Night Activity Type**<br>Select a Night Activity Type. An Activity Type is a function that will execute when the condition (night time) is met. |

*Quick Tip*

*You can click the ⚙ icon to be taken to the next activity*

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## Holidays

When a holiday is detected an activity type will be activated. Some activity types, such as an announcement, will allow for further configuration of an audio file to be played during the activity.  It is possible to manually turn holiday mode on or off on a handset by using a dial code on an extension with the "update settings via handset" option enabled.



| 1. | **Current State** |
|---|---|
| | Displays the current state of the Holiday condition. |
| | Office Open: Normal call flow will be active. |
| | Office Closed: Holiday activity will be used. |
| **2.** | **Name** |
| | Name of the condition, set a name to describe the Holidays defined. |
| **3.** | **Allocated Dial Code** |
| | Use this dial code on a handset to manually turn Holiday mode on or off. |
| **4.** | **New Holiday Date** |
| | Create a new Holiday. |
| **5.** | **Name** |
| | Name a Holiday. All characters, numbers and symbols are allowed. |
| **6.** | **Start and end dates** |
| | Choose the start and end dates of each created Holiday. |

| | |
|---|---|
| 1. | **Holiday Activity Type**<br>Select an Activity Type. An Activity Type is a function that will execute when the condition (a holiday) is met. |
| 2. | **Holiday Activity**<br>Action that will be executed depending on the specific Activity Type that has been selected. An example of this is an announcement audio file playing. |

## Ring Groups

Ring Groups allow for a group of phones/extensions to ring simultaneously when a call is received. Multiple ring groups can be configured within a single call route. An extension can be a member of multiple ring groups or of a single ring group. If a call enters a ring group and times out the "next activity type" will be initiated, for example, a call may be passed to another ring group, a call queue, or even forwarded to an external mobile number to name just a few options. Multiple ring groups can be configured to loop calls between themselves until either the call is answered or the caller terminates the call.



1. **Name**
   The name of the Ring Group.
2. **Pre Ring Ring time**
   The amount of time the incoming caller will hear a ring tone before a call connects to the Ring Group.
3. **Ring Time**
   The amount of time a call will ring for once it reaches the Ring Group.
4. **Pickup Group**
   Select a Pickup Group to be used by this Ring Group.
5. **Valet Park**
   Select a Valet Park group to be used by this Ring Group.
6. **Initial Recording**
   The initial recording that will play when a call first enters the Ring Group. This

| |
|---|
| is commonly a welcome message. |
| **7. Music On Hold**<br>Music on hold stream used for callers when waiting to be answered. |
| **8. Next Activity Type**<br>The type of activity that will occur when the maximum ring time has been exceeded. For example, the caller may be placed in a Valet Park. |
| **9. Next Activity**<br>Further to the next activity type, this enables further action to occur when the activity type is activated. Further to the above example, you may specify which Valet Park to place a caller in. |
| **10. Enable Direct Dialling**<br>If selected, this option allows people to dial the Ring Group directly from the outside. |



| |
|---|
| **1. Ring Group Extensions**<br>Select the extensions you wish to participate in this Ring Group. |

## Call Queues

Call Queues are an alternative to a Ring Group. As opposed to an incoming number causing all extensions to ring at the same time (as occurs with a Ring Group) a Call Queue places the incoming call into a queue. The queue works on a 'first in first out' principle; the first call in the queue is the first call to be given to an "agent". Using a Call Queue enables options such as Wrap-up Time to be configured. When the caller times out of the call queue the "next activity type" will be initiated.



| | |
|---|---|
| 1. **Name** | Call queue name, this will be used to identify this condition throughout the PBX options. |
| 2. **Exit Key** | Give callers the ability to exit the queue by pressing "1", users will be transferred to the Next Activity (voicemail, as an example). |
| 3. **Timeout** (**minutes**) | Maximum time caller is held in the queue before being transferred to the Next Activity (voicemail, as an example). |
| 4. **Wrap-up Time** (**seconds**) | Number of seconds before a new call will be transferred to a user after completing a call. |
| 5. **Announce Position in Queue** | Once enabled callers will be given their position in the queue as calls advance. |
| 6. **Pickup Group** | Enable a pickup group for this call queue. |
| 7. **Valet Park** | Set a valet park slot for the queue. |

| | |
|---|---|
| 1. | **On Hold Music**<br>Hold music used for callers in the queue. |
| 2. | **Initial Recording**<br>Select a recording to be played as a caller enters the queue. |
| 3. | **First Chime Recording**<br>Recording played before queue position announcement (if enabled). |
| 4. | **Second Chime Recording**<br>Recording played after queue position announcement (if enabled). |



| | |
|---|---|
| 1. | **Activity Type**<br>Select the activity type for the call queue, used if a caller exits the queue by pressing 1 (if enabled) or the call times out. (for example, voicemail) |
| 2. | **Activity**<br>Select the activity for the call queue. This activity may not always be available, depending on the selected |
| 3. | **Login Dial Code**<br>Short code dialled by PBX agents to "login" to the queue. |
| 4. | **Logout Dial Code**<br>Short code dialled by PBX agents to "logout" of the queue. |
| 5. | **Enable Direct Dialling** |

> Configure a direct in-dial for this call queue.

## Valet Parking

Use Valet Parking to place a call on hold whilst you continue to call or answer another number. The call can be retrieved from another extension or the same extension that placed the call in the park. Upon placing a call in a Valet Park a slot number is read back which can be dialled to retrieve the call. For example the user may dial 9000 to send a call to the Valet Park and will be informed before finalising the transfer that the slot number is 9001. To retrieve that particular call the user would dial 9001.



| | | |
|---|---|---|
| 1. | **Name** | Valet Park name, this will be used to identify this condition throughout the PBX options. |
| 2. | **Status** | Current status of the Valet Park |
| 3. | **Send To Number** | Number used to transfer calls into the Valet Park slot, slow number is announced when call is transferred. |

# Auto Attendant (IVR)

Auto attendant is a virtual receptionist that allows the caller to route their call to a particular destination based on the options presented to them by the auto attendant and the caller's own requirements. Caller options are configurable in numerous ways and are selected via input from the caller's phone pad. The audio file that is played to the caller is also configurable and can be recorded from a handset (see recorded sounds for more information).



1. **Name**
   Auto Attended name. This will be used to identify this condition throughout the PBX options.

2. **Greeting**
   Greeting played when the caller first enters the auto attendant. This would typically be the list of options available to the caller.

3. **Pre Ring Ring Time (seconds)**
   The amount of time the incoming caller will hear a ring tone before a call connects to the Auto Attendant.

4. **Timeout (seconds)**
   Time in seconds before the timeout activity is used.

5. **Repeat IVR (times)**
   The amount of times the IVR will repeat all of the options to the customer.

6. **Activity Type (timeout activity)**
   An Activity Type is a function that will execute when the condition (timeout) is met.

7. **Activity (timeout activity)**
   A further activity that can be selected depending on the Activity Type that is being configured.

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| Dial# **1** | Activity Type **2** | Activity **3** | Label **4** | Delete **5** |
|---|---|---|---|---|
| 9 ▼ | Replay Options ▼ | | replay | ✖ |
| 1 ▼ | Conference ▼ | Room 1 ▼ | conf. call | ✖ |
| 2 ▼ | Extension ▼ | 101 (Test101) ▼ | ext. | ✖ |
| 4 ▼ | RingGroup ▼ | Test1-Group ▼ | ring group | ✖ |

1. **Dial**
   The dial number is the number the caller will press on their keypad to choose a particular option. For instance, in this example, the caller would press "9" to replay the options available to them.

2. **Activity Type**
   The activity type is the type of activity that will be initiated when its corresponding dial# is selected by the caller. For instance, in this example, pressing "9" on the caller's keypad would initiate the "replay options" activity type.

3. **Activity**
   Some activity types allow for a further action. An example of this is the conference room option. When a caller presses "1" on their keypad the "conference" activity type is initiated. This then forwards the caller to conference room 1.

4. **Label**
   The label is for administrative purposes only. It allows for the PBX administrator to label each option in a way that helps to identify its purpose.

5. **Delete**
   The delete option will remove the selected line.



1. **Enable Direct Dialling**
   It is possible to directly dial the IVR by selecting this option. Upon selection, a Dial Code unique to the selected IVR will be generated. Dialling this number externally will take the user directly to the IVR options.

## Recorded Sounds

These sounds are utilised as part of call flows on the phone system. These sounds may be recorded, uploaded or altered. These sounds can either be recorded using the system dial code on an enabled handset, or uploaded to the phone system as a pre-recorded sound file.

*Example Scenario:* A sound is required as an initial greeting message on a phone system.



|     |     |
| --- | --- |
| 1. | **Name** <br> Used to identify the recording throughout the PBX options. |
| 2. | **System Dial Code** <br> Dial code assigned to this recording, dial this code from any enabled handset to update the recoding using sound manager. |
| 3. | **Upload File** <br> Select a local file to upload. |

| Name 1 | System Dial Code 2 | Download File 3 | Delete 4 |
| --- | --- | --- | --- |
| BusyAnnouncement (view/edit) | *903 | Download | Delete |
| After Hours IVR (view/edit) | *904 | Download | Delete |
| Call Queue (view/edit) | *905 | Download | Delete |
| Holiday Announcement (view/edit) | *906 | Download | Delete |

|     |     |
| --- | --- |
| 1. | **Name** <br> The name of the recorded sound. |
| 2. | **System Dial Code** <br> The System Dial Code that is used to record the sound on a handset. |
| 3. | **Download File** <br> Use this link to download the file to the local machine. |
| 4. | **Delete** <br> To delete the recorded sound from the PBX. |

## Announcements

Announcements are used to play Recorded Sounds as part of a call flow.

*Example Scenario:* An inbound call to a ring group is not answered, the call moves to a second ring group with more users, an announcement can be played before the call enters the second ring group reassuring the caller they will be answered shortly. Alternatively, an announcement can be used at the start of a call flow to inform callers of current events (i.e. service outages).



| | | |
|---|---|---|
| 1. | **Name** | Used to identify the recording throughout the PBX options. This is primarily for administrative purposes. |
| 2. | **Next Activity Type** | After the announcement has been played to the caller the next activity type will be initiated. In this example, the caller will be taken to a ring group. |
| 3. | **Next Activity** | Further to the next activity type, the activity option is an additional option. In this example, the activity specifies which ring group the caller will be sent to after the announcement has been played. |
| 4. | **Sound File** | Select an audio file to play during the announcement. |
| 5. | **Enable Direct Dialling** | Map a direct indial number to this announcement. Dialling the number externally will take the caller directly to the announcement. |

## Music on Hold

Music on hold is an audio file that is played back to the caller. Music on hold can be played back to the caller while they are waiting to be answered by a ring group or while they are waiting in a call queue. It can be played back to the caller when they are placed on hold during a call. Multiple Music on Hold streams can be created, to which audio files can be uploaded.

| Files in this stream: | | |
| --- | --- | --- |
| Name **1** | Listen **2** | Delete **3** |
| ponce-preludio-in-e-major.wav | Download | Delete |

| | |
| --- | --- |
| **1. Name** | |
| The name of the audio file in the Music on Hold stream. | |
| **2. Listen** | |
| This option allows the PBX administrator to download and listen to the audio file in the Music on Hold stream. | |
| **3. Delete** | |
| To delete the audio file in the Music on Hold stream. | |

| Add Music to this stream: |
| --- |
| Select **1** |
| Upload    Cancel |
| **2**         **3** |

| |
| --- |
| **1. Select** |
| Use the select option to navigate through the local computer directories to an audio file. |
| **2. Upload** |
| To upload the selected audio file to the Music on Hold stream being configured. |
| **3. Cancel** |
| To cancel the process of uploading a new audio file. This will exit without performing any uploading. |

## Virtual Extensions

A virtual extension functions similarly to a physical handset, but with some limitations. The virtual extension is assigned an extension number and also given a name. However the virtual handset can only be dialled from an internal number. Upon dialling the virtual handset an activity is initiated. This can be anything from entering a conference call room to dialling an external phone number, or even checking against a Day/Night condition.

*Note: The timeout of the virtual extension needs to be greater than the time taken to initiate the next activity. For example, if calling an external number, the timeout must take into consideration the time taken to connect the call.*



| | |
|---|---|
| **1. Name** | Used to identify the virtual extension throughout the PBX options. |
| **2. Extension Number** | A 3 or 4 digit extension number assigned to the virtual extension. |
| **3. Activity Type** | Activity for the selected virtual extension. An example of this might be dialling an external phone number. |
| **4. Activity** | Further to the activity type, this enables for further configuration. In this example it allows the PBX administrator to specify which external number to dial upon dialling the virtual extension. |

## Blacklist

Block unwelcome callers from entering your hosted PBX by adding the number to the blacklist. Inbound callers listed on the blacklist will hear a busy tone when attempting to call.

Note: Calls from private numbers cannot be blocked.

| Blacklist: | |
|---|---|
| | 1 Add Blacklist |
| Phone Number 2 | Delete |
| 0400000000 | Delete |
| 0700000000 | Delete |

| | |
|---|---|
| 1. **Add Blacklist** <br> Add a number to the Blacklist. The number will hear a busy tone when attempting to call. |
| 2. **List of Blacklist Numbers** <br> List of numbers that have been added to the Blacklist. They can be deleted using the delete option on the relevant line. |

## Conference calling

Conference calling can be enabled via the call routing option in the PBX configuration page.

When inside the call routing option, first select the phone number to be used for the conference room:

General

Phone Number

0737263163

Then, optionally, enable the caller passcode feature. External callers will be required to enter the caller passcode before being permitted to the conference call. The external callers will need to be told what the passcode is prior to their making the call.

Caller Passcode

☑ Enable inbound route passcode for a caller

Passcode

Then, finally, choose the conference (basic) option as the activity type and the conference room number as the activity.

Activity

Activity Type

Conference (Basic)

Activity

Room 1

Alternatively, if the conference room will be accessed by internal users only, a virtual extension can be created to take users directly to a nominated conference room.

The conference room in this example can be reached by dialling '123'. Users will be taken to conference room 2.

Add Virtual Extension:

Name

conference

Extension Number

123

Activity Type

Conference (Basic)

Activity

Room 2

# Initial Configuration

The following steps will walk you through setting up a new PBX call flow from scratch, adding some extensions and testing the functionality of the new call flow. Before setting up the PBX there are a few things you need to know:

## Call Flow Design

- Ideally this needs to be drawn as a flow chart. The more work that is put into this stage, the easier it will be to configure the call flow in PBX.
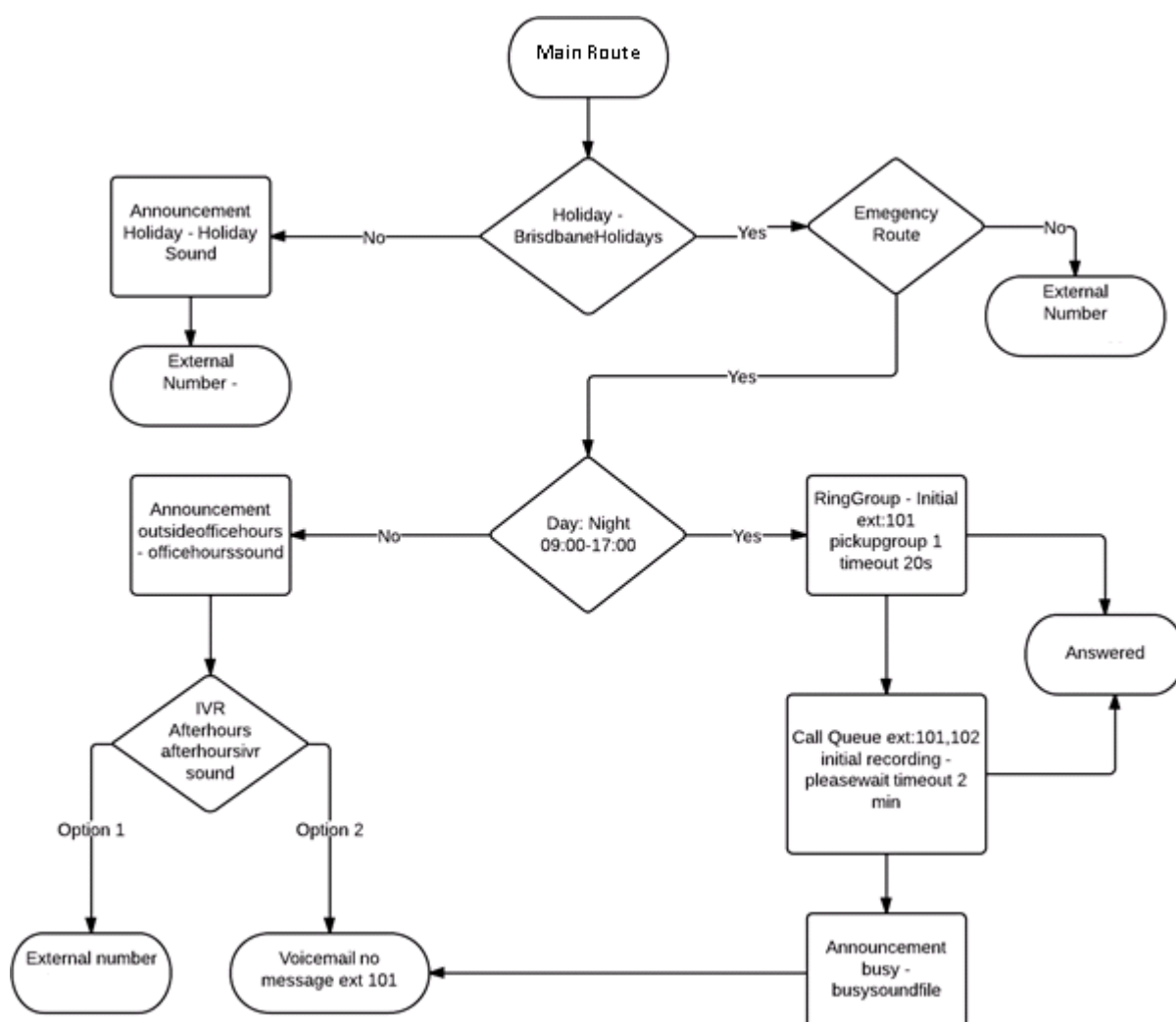


The above call flow diagram provides an example of a complete call flow. It is similar to many actual production deployments and will also serve as the basis for the following configuration steps.

## Data Capture

A full data collection worksheet should be completed prior to the configuration of any PBX. The data collection worksheet will need to gather the following information/criteria;

## Offices & Users:

- Length of extension numbers and numbering plan.
- Names of users.
- Basic extension functionality.
- What types of phones are being deployed? (I.E Cisco SPA504G)
- Will Auto Provisioning be used? (preferred method)

## Recorded Sounds:

- Identify on the call flow where a sound file will be required and what its purpose is. For example, an announcement to be played when the office is away on a public holiday will require an appropriate audio file.

## Phone Numbers:

- Identify which phone number the office will be using.

## Music on Hold:

- Identify where music on hold will be required and what audio file will be used. In this example music on hold is required for the ring group and the call queue.

## Announcements:

- Where will announcements be used in the call flow?
- What purpose will each announcement serve?

## Ring Groups:

- Identify which extensions will participate in the ring group. What will be the ring group's next action if the call times out? How long will the ring group ring for? What music on hold file will be played while the caller is waiting to be answered?

## Holidays:

- Identify what days the office will be closed due to public holidays or other types of holidays. What will be the next action if the office is closed due to a holiday? What will be the next action if the office is not closed?

## IVRs

- Will an IVR be used and, if so, what options will it present to the caller? What will trigger the use of an IVR?
- Remember an audio file will need to be recorded for the IVR. The audio file can be recorded from an extension if it is configured with the "update recordings via handset" option.

## Day/Night Modes:

- Which days will the office be open or closed?
- Between what hours will the office be open?
- What will be the next activity if the office is open? Will it lead to another Day/Night condition, a holiday condition, or will it lead to a ring group?
- What will be the next activity if the office is closed? Will it lead to an announcement followed by leaving a voicemail message, or will it lead to an IVR?

## PBX Build Order

After obtaining this information, the next step is to identify the order in which PBX elements will be configured. Certain PBX elements cannot be configured until all subsequent elements have been configured.

For example, in this call flow you cannot configure the ring group before you have configured the call queue. The call queue cannot be configured until the busy announcement has been recorded and configured. The busy announcement cannot be configured until extension 101 has been created with voicemail. Therefore, in this call flow, the first step will be to create extension 101 followed by the busy announcement, then the call queue, and then finally the ring group.

It is advisable to start building a call flow in PBX from the bottom up. This means that the various elements of a PBX system can be divided into categories of primary, secondary, and finishing.

Primary Elements:

Extensions

Recorded Sounds

Phone Numbers

Music on hold

Secondary Elements:

Announcements

Virtual Extensions

Ring Groups/ Call Queues

IVRs

Finishing Elements:

Holidays

Day Night Modes

Call Routes

These categories are primarily a guide and are not necessarily to be followed strictly. Depending on the exact configurations of the call flow, different elements may move to different categories.

# Configuring the PBX

## Creating Offices and Users



Offices & Users

Creating the office and configuring user handsets is the first step to configuring a new PBX system. An Office is used to group users who share common configurations together.

To create a new office
- Select **Offices & Users.**
- Select **Add Office.**
- Configure the settings within the **Add Office** view.
- Select **Save** after making the configurations.

*Note: To make changes to the Office after the initial configuration, use the **View/Edit Office** tool.*

To configure a user's handset in the newly created office

- Select **Add User to Office**
- Configure the settings for the handset, making sure to use auto provision if you are using a supported handset.
- Save the configuration using the **Save** button

*Note: For the purpose of this example, configure at least two phones in the same pickup group and enable at least one of these phones with the "update recordings via handset" option. This example will assume the use of extensions 101 and 102*

## Creating Recorded Sounds



Recorded sounds are used in a number of call flow items, For example: Auto Attendant for Announcements. A recorded sound can be uploaded using a sound file recorded on a PC, mobile device or recorded via a handset using the assigned dial code.

*Note: Supported file formats for upload: wav, mp3, mp4, m4a*

Creating recorded sounds is the next step towards configuring the call flow. In this example, recorded sounds will be used for announcements, the IVR and the initial greeting message for the call queue.

To create a recorded sound:

- Select **Recorded Sounds.**
- Select **Add Recording.**
- Give the recording an appropriate name to help identify its purpose. The name is for administrative purposes only. For example "Busy Announcement" or "After Hours IVR".
- Choose a system dial code for the sound. This is the code that will be used when recording the sound via a handset. Alternatively a sound file can be uploaded.
- Select **Save & Upload** when you wish to save the configuration for that sound.

To record a sound for a recorded sound file from a handset:

- Using a registered handset with "update recordings via handset" enabled, dial the system dial code.
- You will be prompted on when to begin the recording and how to specify the end of the recording.

*Note: In this example, the following recorded sounds are assumed: "Busy Announcement", "Holidays Announcement", "After Hours Announcement", "After Hours IVR", "Call Queue".*

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## Creating an IVR



Auto Attendant

The next step in this call flow is to create the IVR. The IVR is essentially a virtual receptionist that presents the caller with pre-configured options.

To create the IVR:

- Select **Auto Attendant** from the main screen in PBX.
- Select **Add IVR.**
- Configure the IVR.

*Note: Remember that the "pre ring ring time" is how long the caller hears a ring tone for before connecting to the IVR. The "Timeout (seconds)" is how long the IVR waits before repeating the options to the caller.*

For the purpose of this example call flow, configure the IVR with two options; one option will let the caller leave a voicemail message on an extension and the second option will connect the caller with a nominated external number.

| Dial# | Activity Type | Activity | Label | Delete |
|---|---|---|---|---|
| 1 ▼ | VoicemailNoMsg ▼ | 101 (Test101) ▼ | Voice Mail | ✖ |
| 4 ▼ | ExternalPhoneNumber ▼ | 0000000000 | Emergency Contact | ✖ |

Name
AfterHoursIVR

Greeting Recording
After Hours IVR ▼

Pre Ring Ring Time (seconds)
5 ▼

Timeout (seconds)
20 ▼

Repeat IVR (times)
2 ▼

┌ Next Activity (Timeout Activity) ─
Activity Type
Hangup ▼
Activity
▼

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## Creating Announcements


Announcements

There is now sufficient configuration to begin creating the announcements used by this call flow. Three announcements will be created. An announcement will play the **Recorded Sound** then execute an activity.

*Note: The available destination will be filtered to only show valid destinations*

Create an Announcement:

- Select **Announcements > Add Announcement**
- Enter a name to identify the announcement
- Select an **Activity Type**
- Select an **Activity**
- Select an available Sound File from the list of sound file available on your PBX

Optionally you can enable "Direct Dialling", this will set up a call route direct to the configured announcement.

*Note: Although the "direct dial" feature is available it is not recommended to send calls directly to an announcement but to use the announcement as part of a call flow*

The Announcements used in this example call flow are configured as follows:

| Name | Recording Name | Next Activity Type |
|---|---|---|
| Busy (view/edit) | BusyAnnouncement | VoicemailNoMsg |
| Holiday Announcement (view/edit) | Holiday Announcement | ExternalPhoneNumber |
| After Hours Announcement (view/edit) | After Hours Announcement | IVR |

A "Busy" announcement that plays the "Busy Announcement" recorded sound. Its next activity is to leave a voicemail message on an extension.

A "Holiday Announcement" that plays a recorded sound of the same name. Its next activity is to dial an external mobile phone number.

An "After Hours Announcement" that plays a recording of the same name. Its next activity is to activate the IVR that was previously created and configured.

## Creating Call Queues


Call Queues

A call queue is an alternative to a ring group. It places the caller in a queue that works on a "first in, first out" basis; the first caller into the queue is also the first caller out of the queue. When configuring a call queue as the next activity for a ring group, as per the example call flow, the call queue must be configured first.

*Note: The call queue can be configured to play an initial announcement informing the caller that they are in the queue, followed by playing them a "music on hold" audio file.*



To create the call queue:

- Select **Call Queues** from the main screen in PBX
- Select **Add Call Queue**
- Name the queue, and configure its other settings

*Note: The "timeout (minutes)" option is how long the caller will be in the queue before the "next activity" option is initiated. The "wrap-up time" option is how long an agents phone will wait before ringing again after finishing a call.*

- Configure the **advanced** call queue options. As per the call flow, the next activity type is an announcement that plays the "busy" recorded sound.



- Select the extensions that will participate in the call queue. These extensions will then make use of specific call queue configurations such as wrap-up time.

*Note: A handset can be configured to be part of both a ring group and a call queue.*

## Creating a Ring Group



Ring Groups

Ring Groups allow for a group of phones/extensions to ring simultaneously when a call is received. Multiple ring groups can be configured within a single call route. An extension can be a member of multiple ring groups or of a single ring group. If a call enters a ring group and times out the "next activity type" will be initiated, for example, a call may be passed to another ring group, a call queue, or even forwarded to an external mobile number to name just a few options.

*Note: For the purpose of this example, the ring group will use the newly created call queue as its "next activity" type.*

To create and configure the ring group:

- Select **Ring Groups** from the main PBX screen.
- Select **Add Ring Group**
- Configure the ring group options including name, ring time (seconds), and next activity type.

*Note: Remember that the ring time (seconds) is how long the ring group will ring for before initiating the "next activity" for that ring group. In this case, a call queue. Also remember that if no pre ring ring time has been configured it is best to use the "ringing" audio file for the on hold music option.*



- Select the handsets that will be participating in this ring group.

## Creating a Day/Night condition


Day/Night

Day/Night mode allows for the configuration of office hours. When the office is detected as being open (day mode) a configurable activity will then be initiated. When the office is detected as being closed (night mode) a separate configurable activity will be initiated. Multiple day night modes can be configured one after another in the call flow, allowing for a different activity to occur on different days of the week. This is also known as Day/Night condition nesting.

To create a Day/Night condition:

- Select **Day/Night** from the main PBX screen
- Select **Add Condition** to start configuring a new day/night condition
- Allocate a name for the condition and configure the office hours

*Note: It is recommended that you use the automatic detection of day/night hours feature.*

- Assign a day condition activity. For the purpose of this example, the day condition activity will be to send the caller to the ring group.
- Assign a night condition activity. For the purpose of this example, the night condition activity will be to play the afterhours announcement to the caller.



| DayNightOne (view/edit) | RingGroup | Announcement |
|---|---|---|

Day Activity Type
Ring Group ▼
Day Activity
RingGroup1 ▼ ⚙

Night Activity Type
Announcement ▼
Night Activity
After Hours Announcement ▼ ⚙

*Quick Tip*

*You can click the ⚙ icon to be taken to the next activity*

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## Creating Holidays


Holidays

The Hosted PBX system can be automatically placed into a holiday mode by using a holiday schedule. When the holiday mode schedule has been enabled, calls will be routed via the Holiday Activity.

### Configure a Holiday Condition Group

It is recommended to set up one holiday condition group per office, this gives the ability to set a unique destination for calls directed to each office.

To create a new holiday condition group
- Select **Holidays**
- Select **Add Condition**
- Enter a name for the new holiday group
- Populate the holiday group with **Holiday Dates**
- Set **Activity Type**
- **Save**

### Add Holiday Dates

The dates listed are used by the system to enable/disable the holiday call flow. To add a new Holiday Date use the green + button and enter:
- Name (for example: Boxing Day)
- Start Date (example 26/12/2013)
- End Date (example: 26/12/2013)



### Holiday Activity

This is the action performed when a holiday is matched.
Example options are as follows:
- External Phone Number
- Hangup
- Annoucement
- Day/Night Control
- Extension
- Ringgroup
- Virtual Extension
- Voicemail (Main/Alternate/No Message)

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*Note: The available destination will be filtered to only show valid destinations*



Holiday Activity Screen

## Automatic Mode

By default, once a Holiday Condition Group is created it will be set to 'manual mode'. To enable automatic mode for a call route:

- Select **Call Routing**
- From the list of call routes select an external number (example: 0731051300)
- From the Call Route screen select **Enable Holiday**
- From the drop down select the **Holiday Condition Group**

Once enabled the 'Holiday Condition Group' selected on a Call Route will be used.
The same Holiday Condition Group can be used on multiple Call Routes.



## Manual Mode

Holiday conditions can be enabled/disabled manually using the assigned dial code. This dial code will be listed in the web interface under the Holiday Condition Group.
*In the following example the assigned code is \*944*

## Creating a call route



Call Routing

The call route is now ready to be configured. Once the call route has been configured it will be possible to dial the route number and test the functionality of the call flow.

To configure the call route:

- Select **Call Routing** from the main PBX screen
- Select **Add Call Route**
- Choose a number to use for the call route from the drop down box.
- Select the time zone and any other advanced features. For this example, enable the holiday condition check.



- Choose any emergency extensions to monitor and the emergency activity. In this case extension 101 is the emergency extension and the emergency activity is to dial an external number.



- Select the next activity to occur during normal operations of the call route.



*Note: Multiple call routes can be configured to use the same call flow.*

## Forward all

To temporarily forward inbound calls to a full national number:

- Select "Enable Forward All" under the call route.
- Note the allocated dial code (in this example *920)
- From any phone with "Update settings via handset" enabled dial the allocated code
- At the prompt enter the number you would like calls to forward to

- To cancel the call forward, dial the allocated dial code

☐ Enable Forward All

You can forward all calls to an Extension, Virtual Extension or External Number.
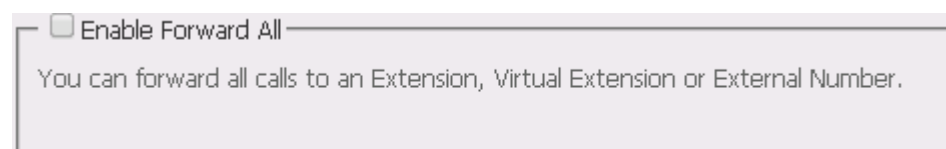
## Pickup Group configuration

Phones configured under the same pickup group can retrieve inbound calls from one another, regardless of which phones are ringing or not ringing. There are a few rules to keep in mind when configuring pickup groups:

- It is recommended the phones be configured in the same office
- Phones must be configured under the same pickup group number if they are not in a ring group
- Phones in a ring group will use the ring group's pickup group number by default
- Phones outside a ring group that want to take calls from a particular ring group must be configured with the same pickup group number used by the ring group
- Pickup groups are disabled by default. Configuration will need to occur after setting up handsets and/or ring groups.

Phones can be configured to use a pickup group via the extension configuration page. Select a pickup group number from the pickup group option:



*Default configuration of a new handset. By Default, pickup groups are not enabled.*

When a phone is not in a pickup group and also not in a ring group it cannot retrieve calls ringing on any other phones.

Ring groups can be configured to participate in a pickup group. All phones inside that ring group will then also participate in the same pickup group.



*Pickup group option, configurable within a ring group. In this case all phones active in the ring group would now participate in pickup group 7.*

To retrieve a call from a phone in the same pickup group, dial ** from the phone you wish to take the call on.

If the phone being used has not been auto-provisioned via option 66, the dial string may need to be manually updated. The correct dial string is:

**(*xx|xx.|**|*xx.|**xx.)**

## Nested day/night conditions

Multiple day/night conditions can be nested to provide extensive control over call flows. A prime example of nested day/night conditions is the ability to divert phone calls when the usual answer point is unattended.

The following diagram illustrates nested day/night conditions:
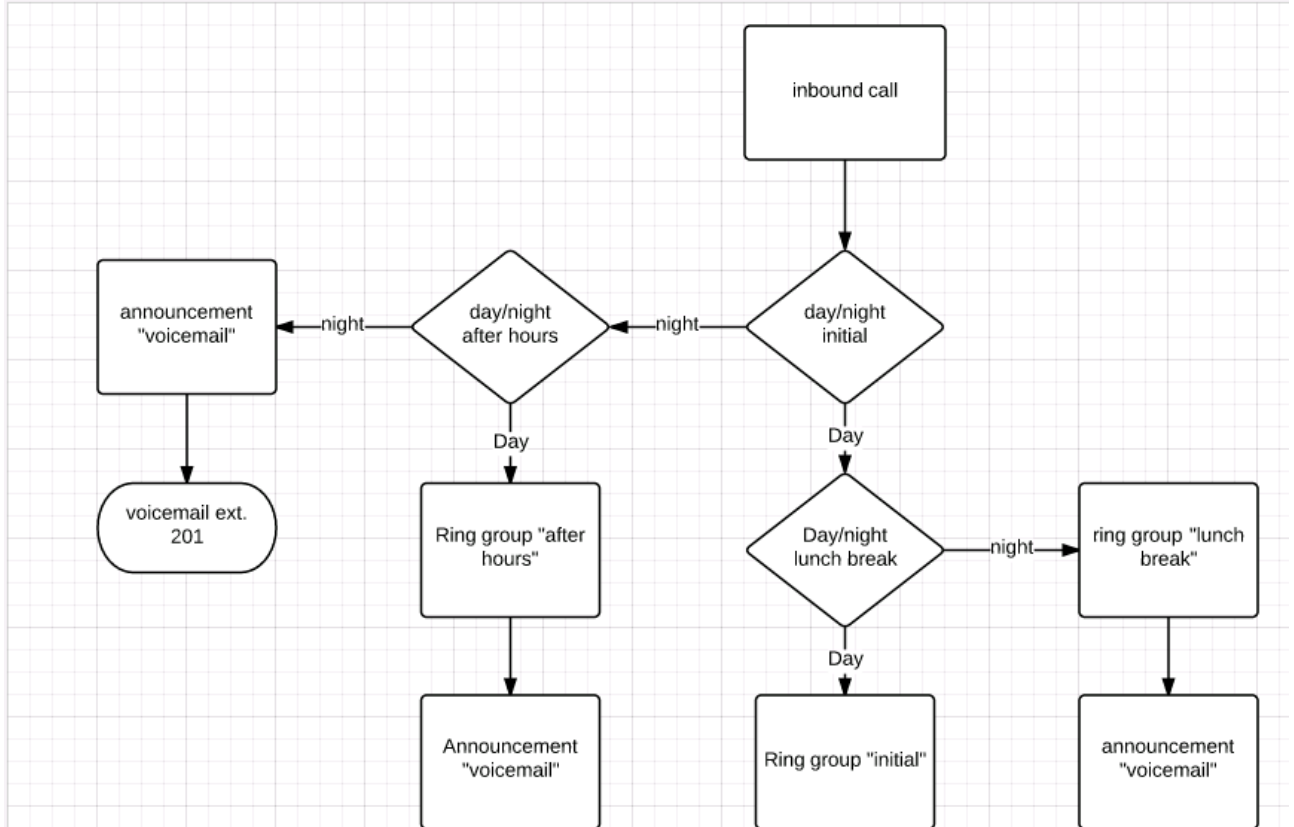


An inbound call is first processed by the "initial" day/night condition. When the office is determined to be open, the call is then processed by the "lunch break" day/night condition. If the "lunch break" day/night condition is in day mode than the call is received at the company's primary answer point (a receptionist for example). If the "lunch break" day/night condition is in night mode (the receptionist may be on lunch or away from the phone) than the calls are diverted to a completely different answering point.

A second nested day/night condition called "after hours" can be seen in this diagram. Its purpose is to process calls when the "initial" day/night condition is in night mode, but there may be after hours support available on certain days of the week.

The configuration on the "initial" day/night mode will have office hours selected with automatic day/night detection and will use the "after hours" and "lunch break" day/night conditions as its next activities.

## Voicemail

By default voicemail is disabled. To enable voicemail on an extension, tick the "**enable voicemail**" option on the extension configuration page.



Voicemail messages will be stored locally on the phones mailbox. This is accessible by either dialling 777 or by pressing the shortcut key on Cisco SPA phones (this key has an envelope icon on it).

Voicemail messages can be sent to a nominated email address if the "**send messages to my mailbox**" option is enabled.



Messages can then be automatically deleted from the phones local mailbox after the message has been sent via email in a **.wav** format. *Note: This feature is optional.*

When accessing voicemail on a phone the user must dial their pin code correctly and then dial the # key. For example: 5114#.

Messages on a phones local mailbox can be saved or deleted after being heard for the first time. Pressing 7 will delete the message while pressing 0 will save the message.

To configure the greeting that will be heard when a caller leaves a voicemail message, dial 777 and press 5 to access advanced voicemail features. From here, press 1 to record a greeting and then choose a number from 1 to 9. Up to 9 greetings can be pre-recorded in this way.

To listen back to a pre-recorded greeting from the advanced voicemail features menu, press 2 and then select a greeting from 1 through 9.

To record your name press 3 when at the advanced voicemail features menu.

## Account Code Dialling
*Enabling and configuring Account Code Dialling*

To enable the Account Code Dial feature, navigate to the PBX configuration page through the MY Telair portal and select "add-ons" from the configuration main screen. Then, select "configure add-ons".



Once inside the add-ons screen, select the "enable cost centre plugin" option.



After selecting this option press 'save' at the bottom of the page. You'll be taken back to the main PBX configuration page. Mouse over the 'add-ons' configuration option and select 'account code dialling'.

Tick the 'enable account code dialling' option to enable the feature.



Once enabled you will be able to configure a prefix, an account code length, and a delimiter.

## An example configuration:



Once you have configured the prefix and saved the configuration, select the 'account codes' tab.



From here you will be able to configure the account codes that users will need to dial in order to make an outbound call.

## An example configuration:



*Note: remember to save the configuration as you progress through this setup.*

If you would like to **exclude** certain users from needing to use the account code dialling feature, you can do so through the handset configuration page accessed from the 'offices & users' configuration screen.

An example configuration of a phone that is set to **bypass** the account code dialling feature. *Note that this is **not** bypassed by default:*

# Add-ons

Additional PBX functionality is available by enabling one or more of the available add-ons.

## Cost Centres

Enables account code dialling and reporting. Once enabled account codes can be created that are dialled prior to calling an outside number. Reporting is available summarise dialled numbers by account code including breakdown by local, long distance, mobile and other call types. In addition call costs can be allocated against each call type to allow billing breakdown of each account code.

## GSM Gateway

Once enabled specific mobile numbers can be added to a list allowing those allowed numbers to dial via a GSM Gateway. GSM gateway functionality requires the installation of GSM hardware and SIM Cards into the Hosted Voice platform. Typical use case is a fleet mobile where a customer provides 1 or more Mobile SIM cards to allow free call dialling from the Hosted Voice platform to their mobile Fleet. Please contact your provider to arrange this installation.

## Virtual Fax setup

The Virtual Fax add-on is an advanced feature providing the facility to send and receive a fax electronically and have it sent/delivered by email to a nominated Email address. The Virtual Fax feature is provided on an as-is basis without warranty or expectation of usability. As the Virtual Fax feature operates over a Voice over IP network there may be certain circumstances where fax receive fails. When this occurs there is no Ability for Telair to correct, recover or improve the facility. No notification of failure will be forwarded nor does Telair provide any logging or remedy for such Events.

## Virtual Fax Configuration

**To Enable Virtual Fax**
- Accept the terms of service by selecting "I agree"
- Select "Enable Virtual Fax"
- Select **Save**

The virtual fax addon has now been enabled

**Inbound Fax (Receive)**
- From the main PBX screen select **Call Routing**
- Select **Add Call Route**
- From the list of available numbers select a number
- Select **Enable Virtual Fax**
- Enter receiving email address

Separate multiple addresses with a comma (,).



**Outbound Fax (Send)**

All fax by email senders must be an authorised, follow the instructions below to authorise an email address.

From the main PBX screen select **Addons > Virtual Fax**
Select **Add Fax Sender**
Enter receivers email address
Set the **Outbound Caller ID**
Click **Save**



*Note: Outbound caller ID should be set to a valid fax number as this will be displayed on outgoing faxes*

## Advanced Outbound Call Control

The advanced outbound call control feature allows the ability to dynamically set the outbound caller ID per call. This feature supports up to 9 numbers.

Use: A receptionist located in Brisbane wants to display the outbound number from Sydney.

Dial the prefix number for the corresponding office number you wish to make the call from, followed by the number you wish to call.

## Sending a virtual fax

Virtual faxes are sent via emails. Prior to this, your email address must be allowed to send virtual faxes. To find out if your email address is allowed please check the PBX configuration *(see the section "virtual fax setup" for more information on this topic).*

**To:** fax@mycloudpbx.com.au

**Subject**: [target number eg 0731051300]

**Attachment**: [fax document].pdf

**Body**: Fax header page

The document you wish to fax must be in PDF format on your computer. To send the document as a fax open a new email. Use the following format for your new email:

| | | |
|---|---|---|
| Send | To... | fax@mycloudpbx.com.au |
| | Cc... | |
| | Subject | 1300790112 |
| | Attached | Test fax.pdf (84 KB) |

This is the fax header page.

At this point you are now able to press send. The attached PDF document will be received by the target fax number as a normal fax.

# Auto Provisioning

Cisco, Polycom and Yealink IP phones can be configured automatically by the Hosted PBX. Auto provisioning reduces initial deployment time and enables configuration updates for deployed phones with little or no end user interaction.

## Step 1

Obtain MAC Address

## Step 2a – New User

Select **Office and Users**, under the office select **Add User**

Select the **Auto Provision** checkbox, complete the following:

- Set the number of **Calls Per Line Keys**

- Select the **Phone Model** from the drop down list

- Add **Expansions Modules** (if applicable)

- Enter the phones **MAC Address**

## Step 2b – Existing User

Select **Office and Users**, under the office select the existing user

Select the **Auto Provision** checkbox, complete the following:

- Set the number of **Calls Per Line Keys**

- Select the **Phone Model** from the drop down list

- Add **Expansions Modules** (if applicable)

- Enter the phones **MAC Address**

## Step 3 – DHCP with option 66

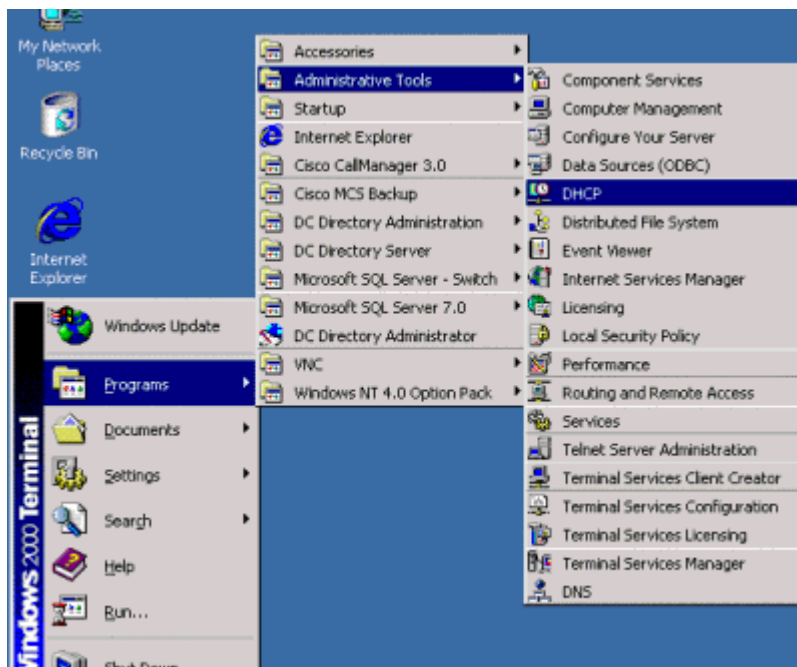Configure the local DHCP server with option 66 setting:
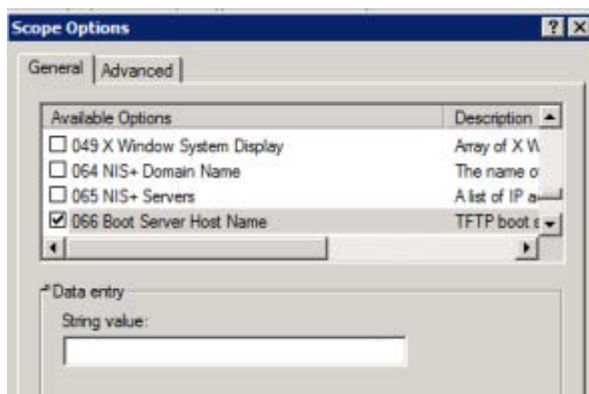
      **ps.mycloudpbx.com.au**

# DHCP Configuration Examples

## Windows Server 2000/2003

- Open the DHCP server management console



- Expand the tree, right click on **Scope Options** and select **Configure Options**
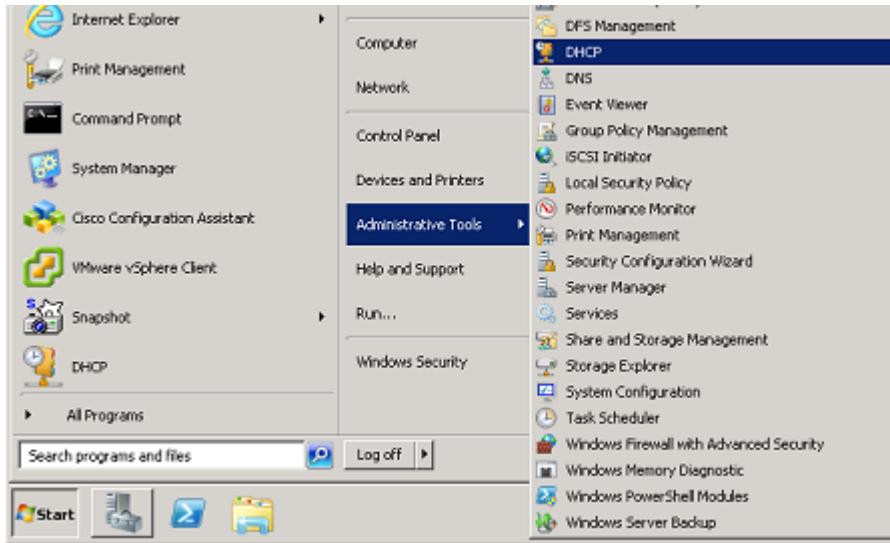


- From the list select **066 Boot Server Host Name** and enter the following string value:
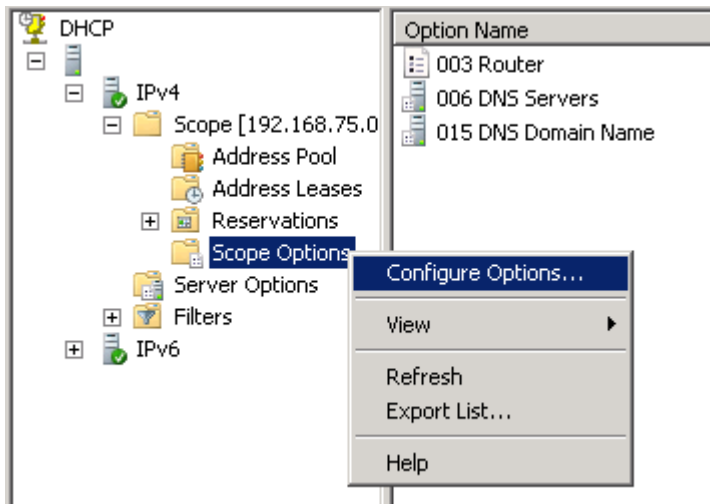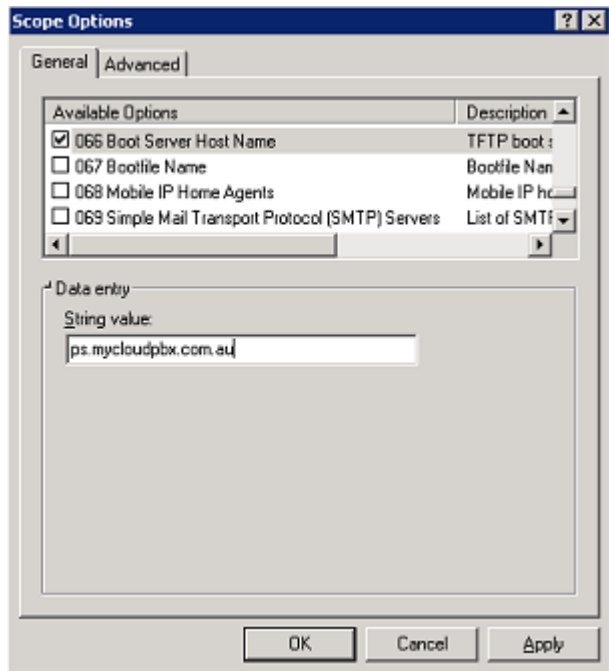
ps.mycloudpbx.com.au

# Windows Server 2008

- Open the DHCP server management console



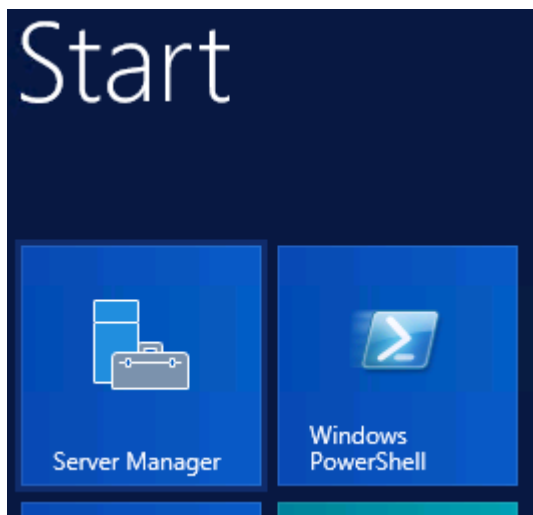- Under **Scope Options** and choose **Action > Configure Options**

- From the list select **066 Boot Server Host Name** and enter the following string value:
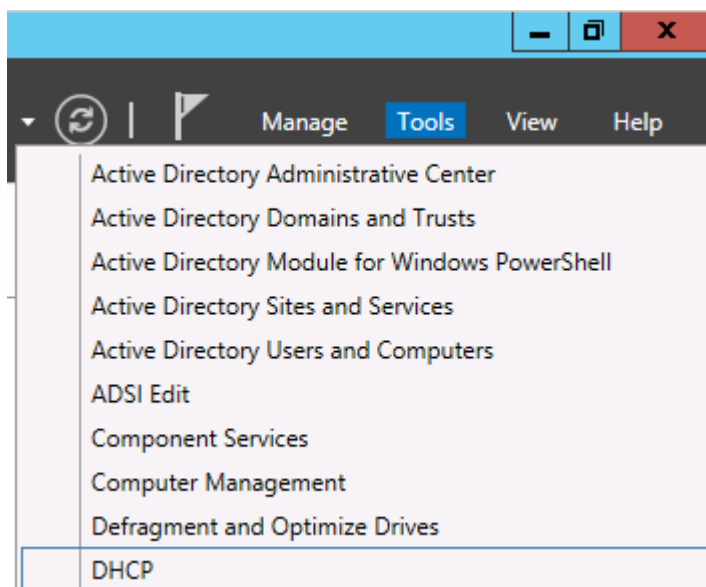
ps.mycloudpbx.com.au

## Windows Server 2012

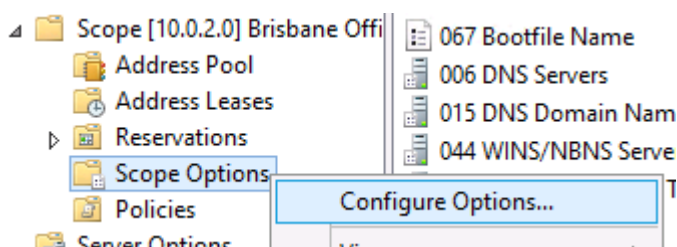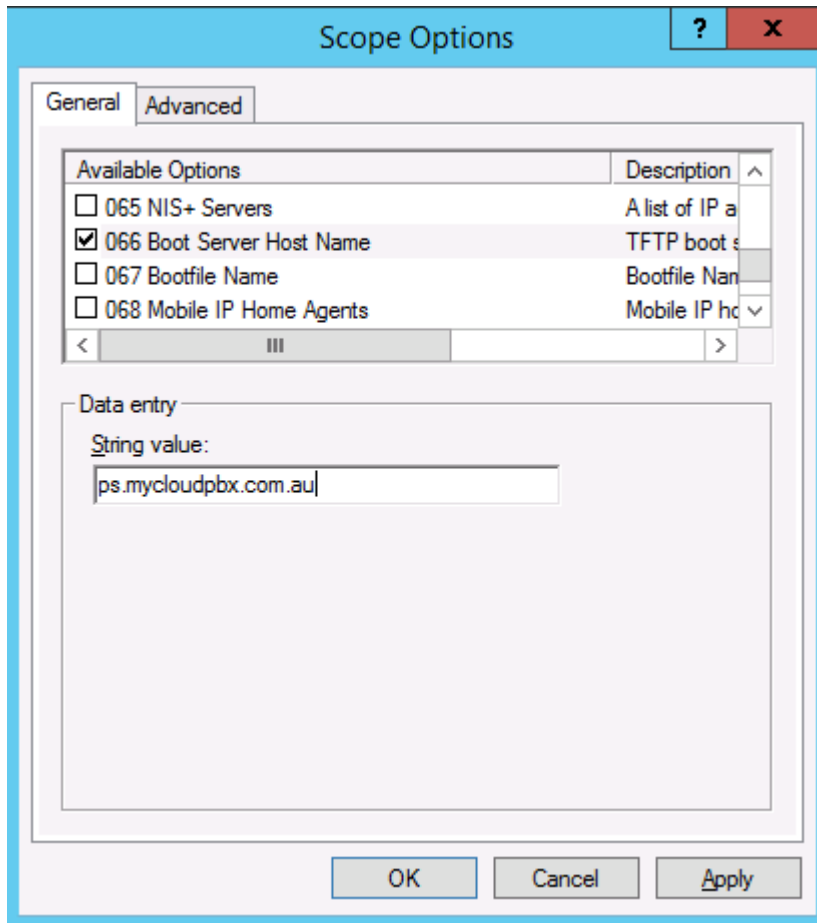Open the DHCP server management console

- Start > Server Manager



- Select Tools > DHCP and Expand the tree



- Under the DHCP scope right click on **Scope Options** and select **Configure Options**

- From the list select **066 Boot Server Host Name** and enter the following string value:

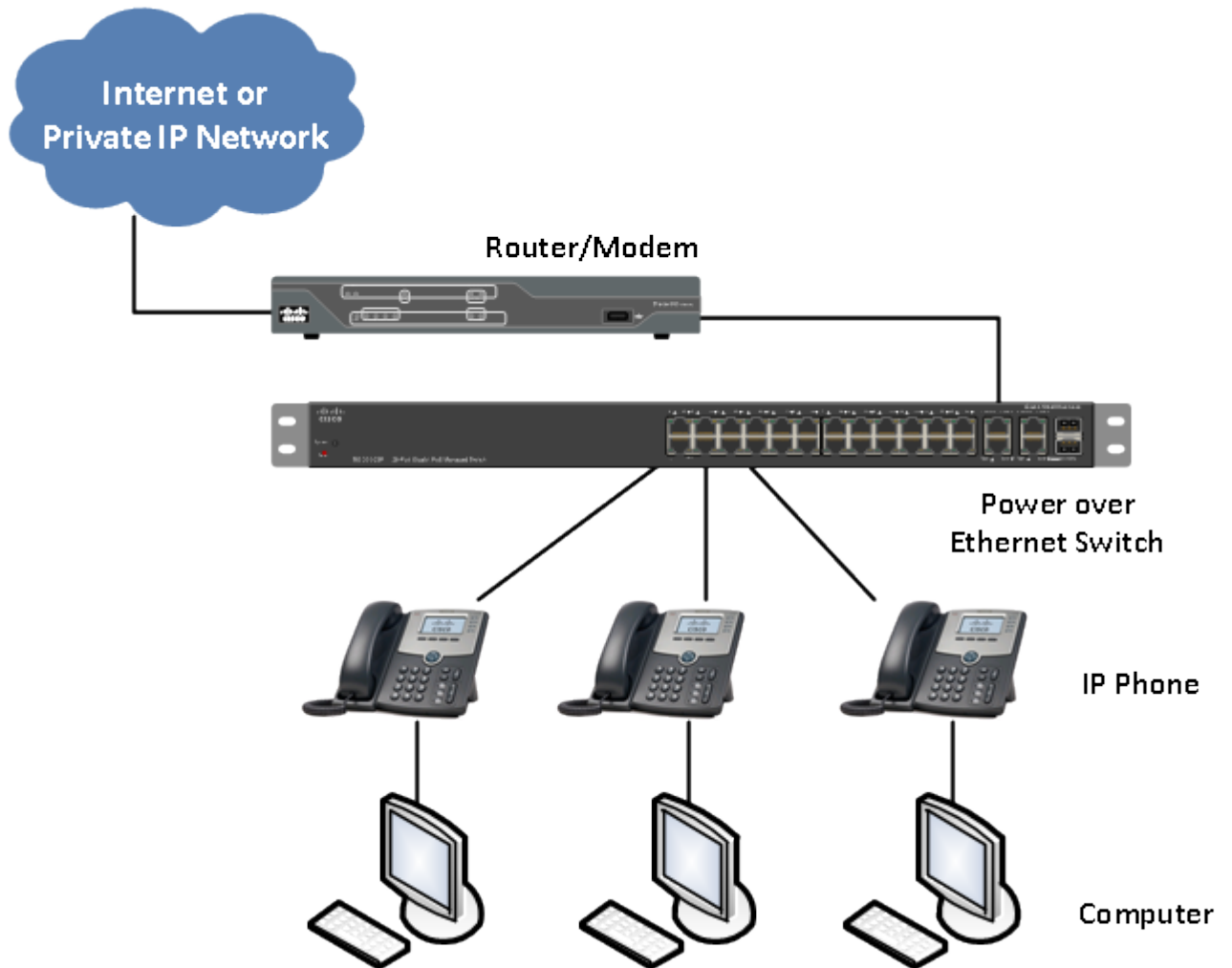  ps.mycloudpbx.com.au

## Cisco Router Example DHCP Configuration

```
ip dhcp excluded-address 192.168.1.1 192.168.1.99
ip dhcp excluded-address 192.168.1.201 192.168.1.255

ip dhcp pool 192.168.1.0/24
network 192.168.1.0 255.255.255.0
default-router 192.168.1.254
dns-server 203.22.70.2
option 66 ascii ps.mycloudpbx.com.au
```

# Network Topology

Example IP telephony network topology:

# Cisco SPA504G IP Phone

## Viewing answered and missed calls

If at any time you wish to view a list of answered calls or missed calls you may do so directly from your Cisco handset.

To access this information you must first press the **menu button** located on the phone, to the left of the **hold** button. The **menu button** has an image of a piece of paper with the top right corner slightly folded down. Pressing this button will change the display on the main screen of the phone to a list of available menu options.

You can use the **arrow keypad** on the Cisco SPA phone (the physical circular keypad with direction arrows) to navigate up and down through the menu options, or press the number of the corresponding option. In this case, navigate to option **3 – Call History.** It may be necessary to press **Select** to access the **Call History** options.

From here you will see **3** available options. You can select between **Redial List, Answered Calls** or **Missed Calls** depending on the information you would like to see. You can use the **arrow keypad** to scroll through the presented information.

To return to the phones normal screen, press **cancel.**

## Transferring phone calls

While on a phone call the phone display screen will display the "**xfer**" option. This option correlates to the 4<sup>th</sup> solid black key on the phone:



*Figure 1: the red highlighted key is the "xfer" option during a call.*

Press "**xfer**" once, and then dial the extension number of the person you wish to transfer the call to. For example: 401. Then press "**dial**". This will dial the extension number you have just specified.

At this stage there are two ways to finish the call transfer:

- To blind transfer a caller, press the "**xfer**" button again before the other user has picked up the phone.
- To warm transfer the caller, wait for the other user to answer their phone and announce that you have a customer to speak to them. Press the "**xfer**" button when ready.

When the call has transferred successfully, the first user will no longer have the customers call on their phone.

A warm transfer can be cancelled either before the other user picks up the phone, or after they have picked up the phone by hanging up the phone to cancel the call. The customer will still be on hold. To speak with the customer again press the "**Hold"** button.

If a call times out while trying to contact another user, a series of beeping tones will be heard for approx. 10 seconds. After these tones are heard, it will be possible to take the customer off hold.