IPPBX

User Manual

Version 20201010

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Your IP-PBX

Congratulations! Your company has chosen an Internet-based, hosted Private Branch Exchange (PBX) to serve its telecommunications needs. To use the PBX, you will use the touch pad of your telephone and the PBX VoIP Control Panel (VCP) - a web interface that allows you to easily manage your PBX account.

Who Should Read this Manual

This manual describes the user features of the PBX and VCP and how to use them. The manual is intended for end users who want to manage their existing PBX account.

Note: PBX Administrators should consult the IP-PBX Administrator Manual for more advanced functionality and provisioning instructions.

PBX Basic Features

- Browser-based VoIP Control Panel (VCP) for managing all features
- Voicemail sent to email as MP3 attachment
- Voicemail notification sent to alpha pager or SMS-enabled cell phone
- Voicemail access from email, VCP, any phone
- Videomail as MPEG4 attachment (if caller has a compatible video device or video softphone)
- Message-waiting indicator (MWI)
- Direct Inward Dial (DID) numbers with any desired area code or even many different countries for any or all extensions
- Any number of DIDs per user all ring to the same extension
- Unlimited, free extension-to-extension dialing anywhere in the world
- Music on hold
- Call park/Call pick-up
- Do not disturb (DND)
- Multiple call appearances on multi-line phone
- Local time zone management
- Call transfer (blind and supervised)
- CallBlast – intelligent combination of “find me / follow me” and call forwarding
- 3-way conferencing
- Call waiting
- Caller ID and call waiting Caller ID
- Caller Name (if supported by your phone)
- Customizable call allow/restrict rules per extension
- Softphone can be used as a “roaming” extension anywhere on the planet
- Full 911 coverage in US and Canada
- Both broadcast and direct intercom - direct intercom can be public or private (devices must have a speakerphone)
- Auto-attendant (company directory configured by first or last name)
- Custom prompts on auto-attendant
- Multi-level prompt menus

PBX Optional Features

- Toll-free number rings to the same phone
- Inbound faxes sent to email as PDF attachment
- Call Groups (either Ring or Hunt)
- Automatic Call Distribution (ACD) queues and reports
- Custom messaging or music on hold for individual ACD queues
- Conference bridge
- Operator station with over 100 extensions in a busy-lamp field either as a software dashboard or a physical Enterprise IP phone with expansion modules

Terminology

The following terms are important to know when using the PBX and VCP.

Account — Where basic information is stored (e.g., name, password, phone number(s), and feature set).

Mailbox — Where callers leave you voicemail.

Extension — A three to five-digit number that is linked to your physical phone(s). Shorter, one and two-digit extensions are generally used for special purposes, such as Call Park, Call Groups, ACD Queues and Broadcast Intercom.

Numbers – Existing phone numbers that have been transferred, new DIDs (even from outside the US and Canada), and new or transferred Toll-free numbers (TFNs) can all belong to your account.

Note: Any user can have one or more accounts, mailboxes, numbers and/or extensions.

Your PBX Account

To use the system, your PBX administrator must first create your account. You are assigned a permanent user ID (usually your phone number or your extension), an extension number, a temporary password, and possibly a personal phone and/or fax number.

Once you log in to your account, you will use your permanent ID and temporary password to access your voicemail box on both your phone and the VCP.

You can also access your voicemail as well as change settings and greetings from any IP, landline, or even cell phone regardless of where that phone is on the planet.

Next, we'll go through all the details of how to set up and use your voicemail.

Voicemail Set Up and Use

To set up your voicemail, use the password given to you by your PBX administrator. With the PBX you can set up your voicemail box from any of the following handsets:

- An IP Phone residing on your organization's IP-PBX
- Any external IP Phone
- Any internal or external phone including cell phones.

Choose how you will set up voicemail from the options in the following table and dial the appropriate number.

Table 1 - Voicemail Access

Access Type	Number to Dial
Your assigned IP Phone residing on your organization's PBX	00
A landline or cell phone, Method 1	Dial your full 10-digit number. Wait for the auto attendant, press the * key and enter your password when prompted.
A landline or cell phone, Method 2	Dial your main PBX number, and then dial 00 and your extension – e.g., 00xxxx. Wait for the auto attendant, press the * key and enter your password when prompted.

You are now in the voicemail main menu. Press 2 to create a personalized voicemail greeting. Follow the prompts to record your first, last name and greetings.

Once you have recorded your greeting, select one of the following options.

Table 2 - Recording Menu

Key	Option
1	Play the recording.
4	Cancel the custom recording and return to the default system settings.
7	Redo the recording.

*	Cancel the recording and return to the Main menu.
#	Use the recording and return to the Main menu.

Once you have set up your personal greetings, return to the Main menu and select from one of the following options.

Table 3 - Main Menu

Key	Option
1	Enter the Message Center (Message Center menu).
2	Change your greeting (Recording menu).
3	Change your password.
4	Change your name (Recording menu).
5	Enter the Features menu.
#	End the call.

Note: We recommend that you press 3 and change your temporary password when you initially configure your voicemail.

Accessing the Message Center

The Message Center allows you to listen to your current, saved and deleted messages. Select option 1 from the Main menu to enter the Message Center. Then select from the following options:

Table 4 - Message Center Menu (1 of 2)

Key	Option
1	Listen to your messages (Message menu for regular messages).
2	Listen to your saved messages (Message menu for saved messages).
3	Listen to your deleted messages (Message menu for deleted messages).
*	Return the voicemail Main menu.
#	End the call.

Once you listen to your message, select from the following options.

Table 5 - Message Center Menu (2 of 2)

Key	Option
1	Listen to the previous message.
3	Listen to the next message.
5	Repeat the message.

Key	Option
7	Delete the message (not available for previously deleted messages).
9	Save the message (not available for previously deleted and saved messages).
00	Forward the message to a mailbox.
*	Return to the Main menu.
#	End the call.

Other Useful PBX Features

Extension-to-extension dialing — Enables you to reach anyone else on your PBX just by dialing their three to five digits extension.

Call transfer — Enables you to transfer a call from one phone to another. You can transfer calls in two ways:

- Blind transfer — when you do not wait for the person to whom you are transferring the call to answer the call before you transfer it.
- Supervised transfer -- when you wait for the person to whom you are transferring the call to answer so that you can announce the call.

Three-way calling — Enables you to talk with two other people at a time.

Call waiting — Enables you to put a caller on hold while you answer another.

Call park — Enables you to transfer the call in progress to a special Call Park extension (usually 99). The call can then be picked up by anyone else on the PBX.

Broadcast and direct intercom — Enables you to make an announcement to a group of extensions by dialing the special broadcast intercom extension number, or to intercom someone directly by dialing 01 and their extension number (e.g., 01xxxx). The device(s) must have a speakerphone and cannot be on another call when dialing an intercom.

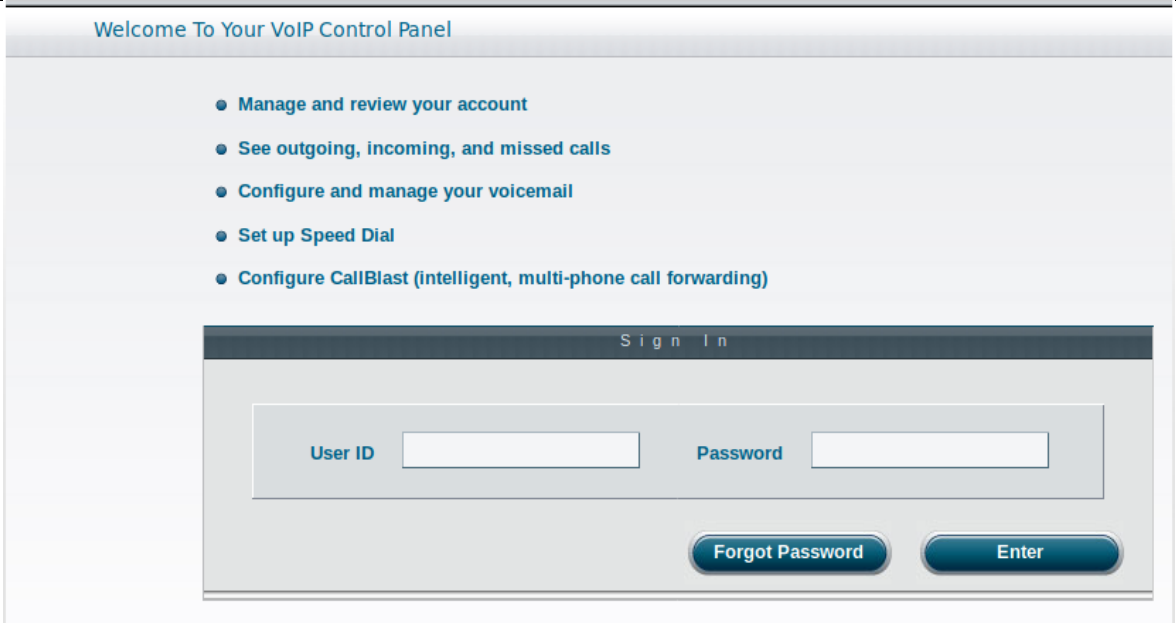
Star key (*) features – For information on how to use these features from your phone, review the section later in this manual.

Login to Your PBX VCP

Once you have set up your voicemail, you manage your account with the PBX VCP, a browser-based interface. To access your VCP, contact your PBX administrator for the web address.

Note: The VCP is best used with Google Chrome or with Firefox browsers.

The first page that appears is the login screen:



VCP Login Screen

To login to your VCP:

- Enter your **User ID** (your main VoIP phone number).
- Enter the **Password** you chose or had assigned to you.
- Click the **Enter** button.

Forgot Your Password?

If you have forgotten your password, click the “Forgot Password” button, then enter your User ID and account’s email address, and a new password will be emailed to you immediately. Otherwise contact your PBX administrator.

Note: The password reset process changes your password completely, so you’ll have to remember this new one going forward or change it using the appropriate page in VCP

Managing Your Account

Once you successfully login, you will see the VCP Main Screen, as shown below. This screen has a series of tabs, each designed to give you information about and control over your account.

Account — change your account information or password.

Call Activity — view and/or export the calls you have made and received.

Messages — listen to, save, or delete your voicemail.

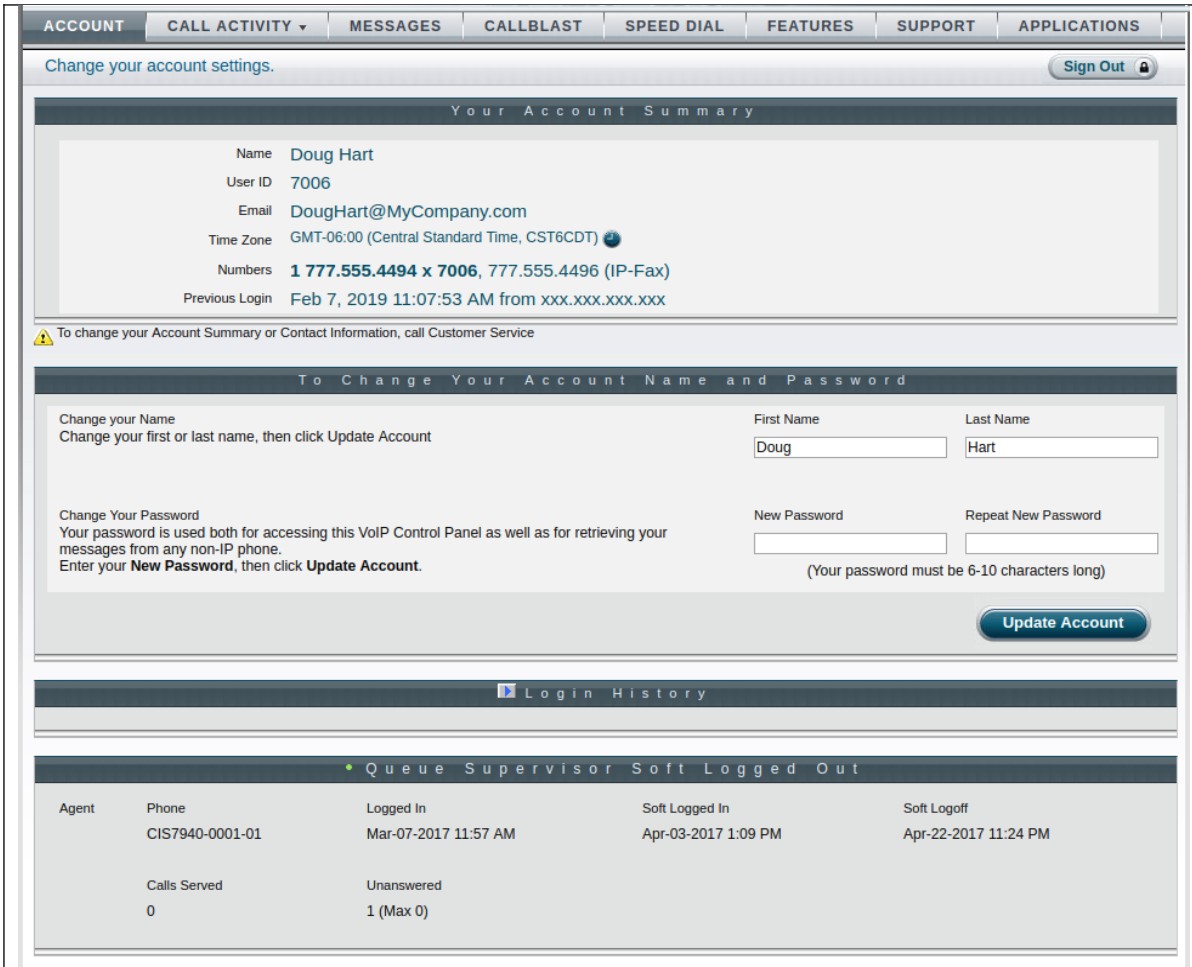
CallBlast — enter up to four different phone numbers that will ring whenever your VoIP number is dialed.

Speed Dial — enter up to 20 numbers that will be called whenever you dial the corresponding code from your VoIP device.

Features — send voicemail as an MP3 attachment to your email address, and/or get voicemail notification to an alphanumeric pager or cell phone via SMS; manage enhanced features, such as Caller ID, Call Waiting and DND or change your current time zone so that your calls and voicemails will be appropriately time-stamped.

Support — download add-ons, products that enhance VoIP functionality and manuals such as this one. You also may have reports here.

Applications — access Attendant Console for monitoring the status of the PBX, ACD Monitor, Web Phone and more.



VCP Account Tab

Suggested Order of Use

We suggest that you follow the order below when using the VCP:

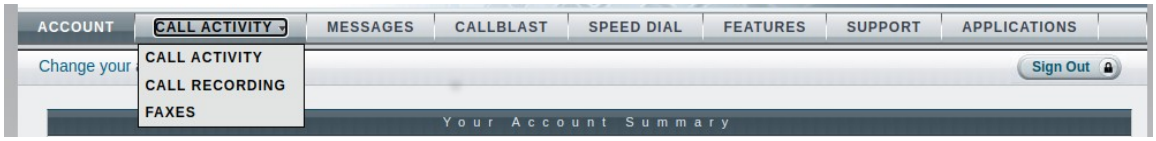
- Change your password, if you want to, using the **Account** tab.
- Set up and manage your CallBlast from the **CallBlast** tab.
- View and manage your voicemail using the **Messages** tab.
- View and export all your calls from the **Call Activity** tab.

Account Tab

The **Account** tab appears by default after you login to the VCP. It has the following areas.

- **Account Summary.** The Account tab also provides a Summary of Account details including: Account Name, Account Number, and all Numbers and Extensions in your account.
- **Change Your Account Name and Password**. Here you can modify your account name and/or password. Enter the new information and then click the Update Account button. A password must be between 6-10 characters and should be numeric because you will also use it to retrieve voicemail via a telephone keypad.
- **Login History.** Click on the expand icon ( ). You can review your login history to verify others are not accessing your account. If you feel someone is accessing your account without permission, change your password.
- **ACD Agent Status**. You can view your status as an ACD agent.

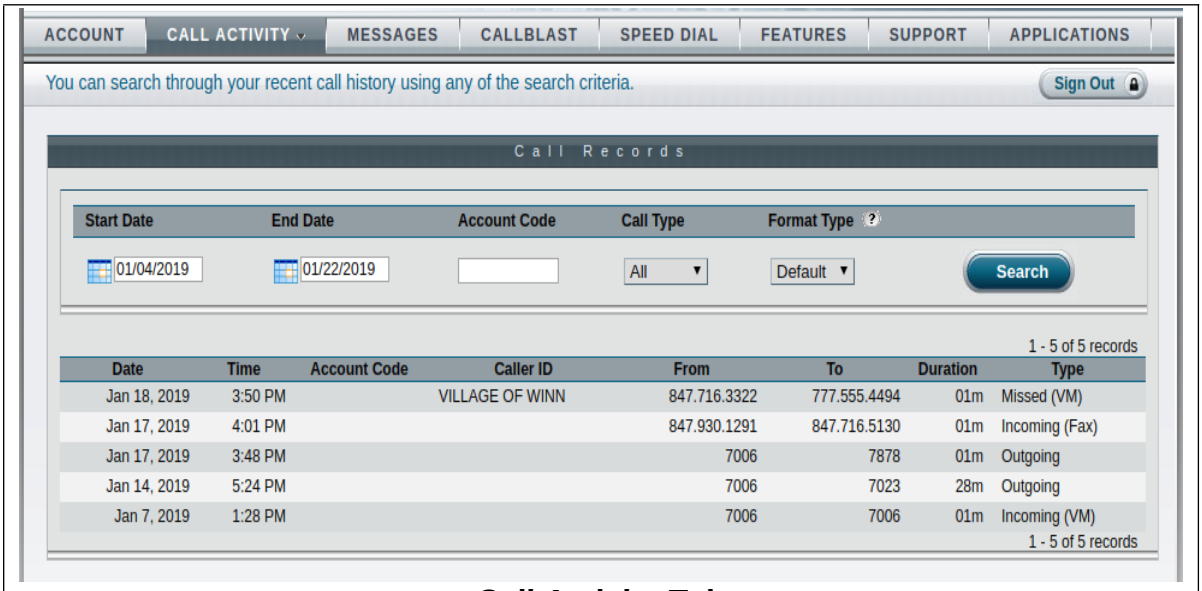
Call Activity Menu



Clicking on the **CALL ACTIVITY** menu may show a drop down list of various options (if available). Here you can click on Call Activity (CDRs), Call Recordings or Faxes.

Call Activity Tab

The **Call Activity** tab allows you to view all calls you placed or received over the past period of time. You can also search through your call history using call type and date criteria. Clicking on the Call Activity tab brings up the screen below.



Call Activity Tab

Call data includes **Date** and **Time**, **From, To**, **Duration** and **Type** (Incoming, Outgoing, Missed).

From this page you can review particular calls by the following process:

- Choose what **Call Type** you want to view - All, Incoming, Outgoing or Missed.
- Choose the **Start Date**, which is the date up to (and including) which the search will take into account.
- Choose **End Date** – the time period from one day to one month that you wish to search.
- Select the desired **Format Type** – Default will show the results on your screen, whereas Excel and CSV will export the results as an XLS or CSV format file, respectively.
- Click **Search**.

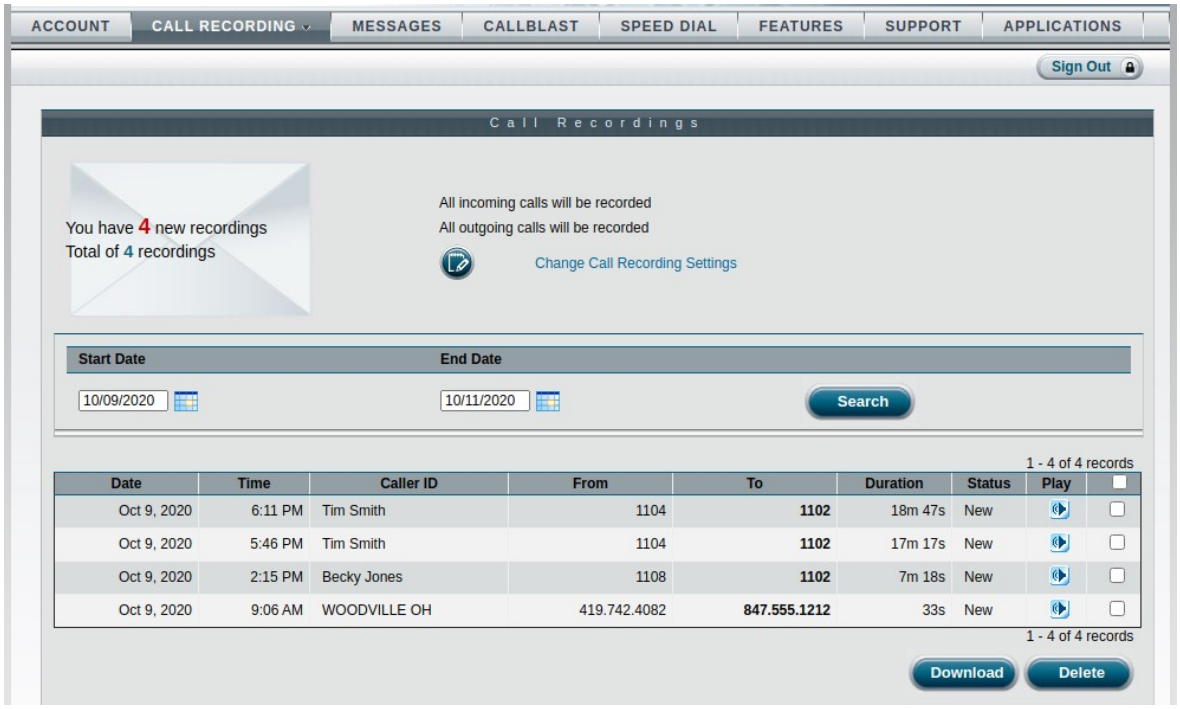
On-screen results are displayed 100 records to a page (if more than 100 were found in your Search).

Note: In some cases a Caller ID and Account Code is not provided.

Call Recording Tab

The **Call Recording** tab allows you to view your call recordings you have over a period of time. Clicking on the Call Recording tab brings up the screen below.

Note: Call Recording is an optional feature.



Call Recording Tab

Call data includes **Date** and **Time, Caller ID, From, To, Duration.**

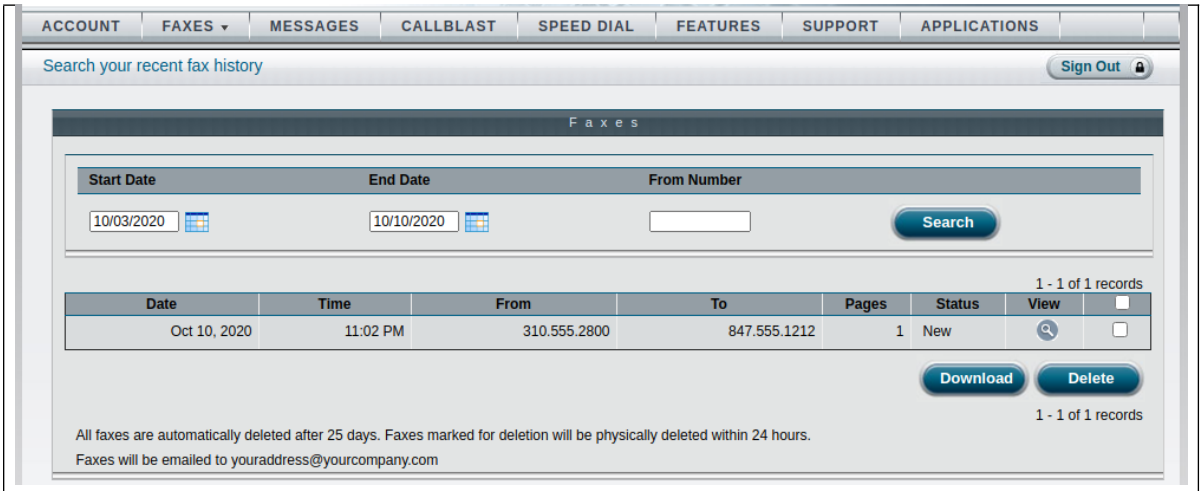
From this page you can play a recording or download it. You can also download multiple recordings combined into a zip file file. The zip file size is limited, so you may need to reduce the number of recordings your attempting to download in one go if you get an error.

You may also adjust your call recording settings from this page.

Faxes Tab

The **Faxes** tab allows you to view your faxes you have received over a period of time. Clicking on the Faxes tab brings up the screen below.

Note: Faxes is an optional feature.



Faxes Tab

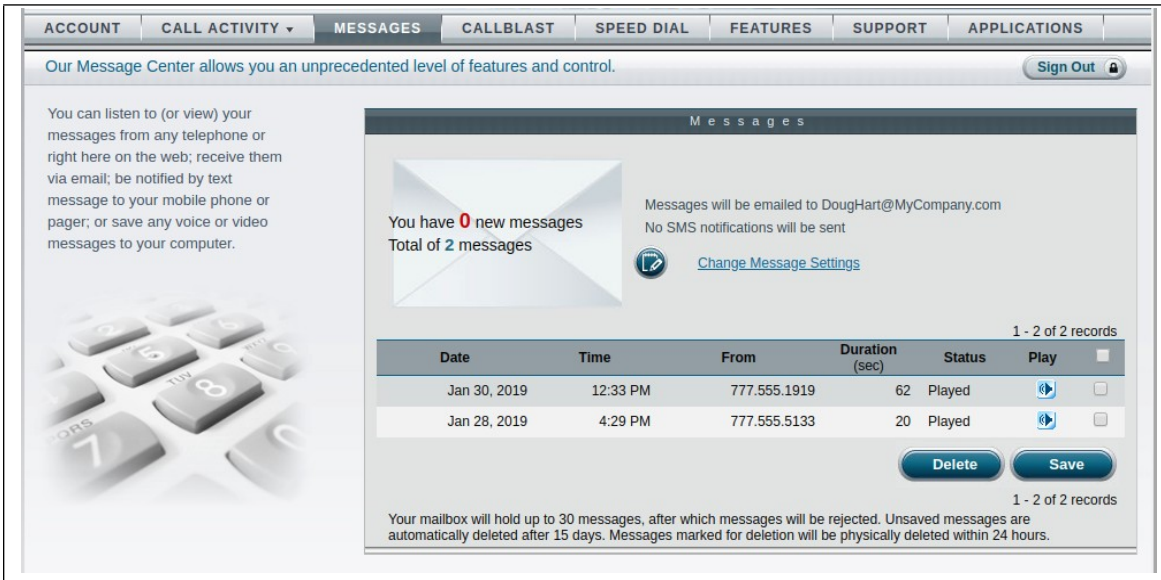
Call data includes **Date** and **Time, From, To, Pages.**

From this page you can view your fax or download it. You can also download multiple faxes combined into a zip file file. The zip file size is limited, so you may need to reduce the number of faxes your attempting to download in one go if you get an error.

Messages Tab

The Messages tab displays your voicemails, allows you to listen to your voicemail, and allows you to change message settings.

Note: You must set up your voicemail greeting via a telephone, not from the Messages tab in your VCP.



Messages Tab

The Messages tab allows you to:

- Listen to your voicemail from the VCP.
- Save voicemail messages indefinitely within the VCP. You can also save messages to your local computer using the download icon.
- Delete unwanted voicemail messages (they will disappear overnight).
- Set up delivery of voicemail to your email as an MP3 attachment, or notification of voicemail to an alpha pager or via SMS to your cell phone
- The voicemail table has the following fields for each record:
    1. **Date, Time and Duration.**
    2. **From** – who left the voicemail
    3. **Status** – New, Played, Deleted or Saved.
    4. **Play** – clicking which plays the Voicemail.
    5. **Checkbox** – used to select voicemails to be Saved or Deleted.

    Click the upper right checkbox to select all voicemail records.

Note: The capacity of your mailbox and the length of time unsaved messages are kept are noted at the bottom of the page.

You can change your email address and if you want the message to be included as an attachment or a link by clicking on the “Change Message Settings”, it will display the same dialog seen later in the manual in the Features section.

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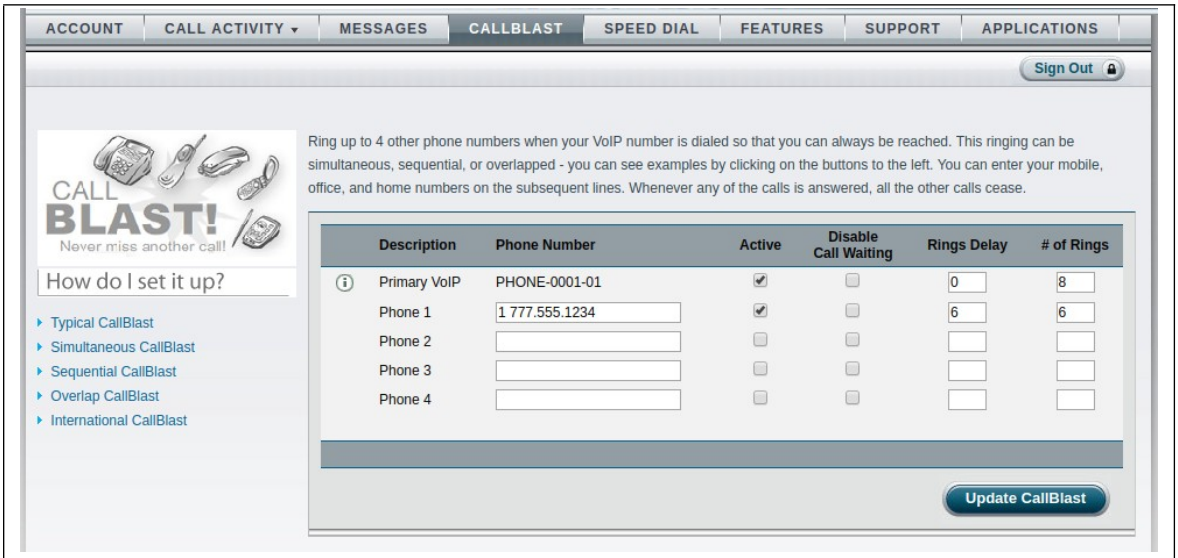
CallBlast Tab

The CallBlast feature gives you the option to route your incoming calls to up to four different phone numbers simultaneously and/ or sequentially so that you can answer the call from wherever you may happen to be.

Any phone can be used as a destination - your home phone, another VoIP phone, your cell phone or computer with a Softphone, regardless of where the device is located.

Examples of different CallBlast setups – Typical, Simultaneous, Sequential, Overlap, and International - are on the CallBlast tab, as shown below.



CallBlast Tab

The above CallBlast configuration would work like this:

- Ring the Primary VoIP line of extension 4708 for 8 rings.
- If the Primary line hasn't been answered after six rings, begin ringing 7775551234, and ring that for 6 rings before stopping.
- If neither phone has picked up we send the call to voicemail.

Warning: If any of your CallBlast phones has voicemail that picks up before the call is answered or goes to VoIP voicemail, your voicemails will all be on that other phone's messaging system!

This means, for example, if your cell phone is set to 0 rings and you have it turned off, many of your calls may go to your cell phone voicemail.

We recommend having at least 2 Rings Delay for your cell phone, which will mean that your VoIP phone will ring roughly 3 times before your cell phone begins to ring since it takes 1-2 rings on your VoIP for a CallBlasted phone to begin ringing even if you have the Rings Delay set to 0.

CallBlast to IP Phones

To include an IP phone as one of your CallBlast numbers, enter the IP Device ID, which is usually in the form of a URI. A SIP URI is the ID and network address of the IP phone and may bear no resemblance to a "normal" telephone number.

CallBlast to a Different Extension

To include a different extension on your PBX as one of your CallBlast numbers, enter the extension number – e.g., 4906 or 5520 – as an extension is a valid dialable number.

To Set up CallBlast

1. Enter your cell phone, home phone or other numbers in the **Phone 1** thru **Phone 4** fields as shown.
2. You make the number active by checking the **Active** checkbox, or take it out of CallBlast by unchecking the box. If you want calls to go directly to voicemail, you can either turn on the DND feature by pressing *78 on your phone, or you can enter 0 for the number of rings on your Primary VoIP phone, or you can make your Primary VoIP phone not active. You can also enable the DND feature by clicking the Features tab and selecting the DND checkbox.
3. Next, set the **Rings Delay**, which is the number of rings on your Primary VoIP line that CallBlast waits before launching a call to the CallBlasted number(s). Zero is recommended for your Primary VoIP phone. Note: It takes 1-2 rings for a cell phone to begin ringing even if you have the Rings Delay set to 0.
4. Last, set the **# of Rings** for each device, after which the CallBlast call to that device will be stopped. When a call is answered on any of the devices, CallBlast automatically stops ringing all other numbers. If the call is still unanswered after the # of Rings for the Primary VoIP line, the call is delivered to your VoIP voicemail.
5. Click on the **Update CallBlast** button to save all changes.
6. Make a test call to your VoIP number to make sure it works as expected.

Note: If your cell phone is a CallBlast number and you turn off the cell phone, all your calls will go to your cell phone's voicemail. Also, if you immediately push the Ignore Call button on your mobile, the call goes to the mobile's voicemail and not the primary VoIP voicemail.

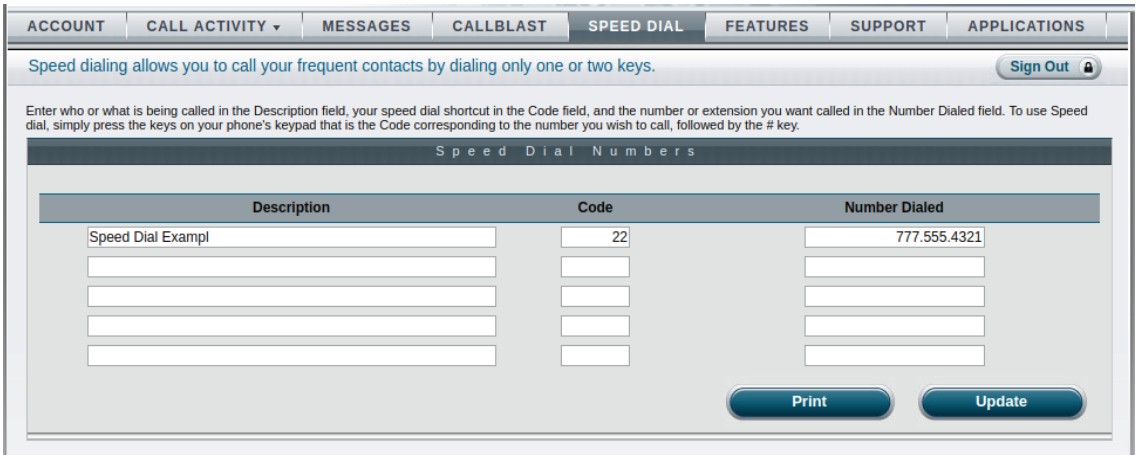
Warning: If any of phones one through four has voicemail set up and their voicemail picks up before the call is answered or goes to you primary VoIP voicemail, your voicemails will be on one of the non-primary phone's message systems.

CallBlast Configuration Examples

The CallBlast tab provides five different sample CallBlast configurations. Look on the left side of the CallBlast tab and click on the button for the type of setup you want. A pop-up window appears and describes the configuration and its results.

Speed Dial Tab

The **Speed Dial** tab allows you to dial up to 20 frequently called numbers by pressing only a few keys. Enter who or what is being called in the **Description** field, the one or two digit speed dial shortcut in the **Code** field, and the number or extension you want to call in the **Number Dialed** field. Then click on **Update Speed Dial** to save your entries and/or changes.



Speed Dial Tab

Printing Speed Dials

If you would like a copy of your Speed Dials to keep by the phone you can use the 'Print' button. It will create a sheet that you can print. You will need to have a PDF file reader like Adobe Acrobat.

Speed Dial Considerations

To speed dial an international number, enter the international access code (011 or 00) followed by the country code and number.

You can enter numbers in US or Canada either with or without the "1" in front of the number.

If you enter any alphabetic characters, they will be changed to the corresponding number on a phone keypad. For example, 1-800-GOF-ORIT would be changed to read 18004636748.

Using Speed Dial

To use Speed Dial, simply press the keys on your phone or softphone keypad that is the Code corresponding to the number you wish to call. To speed the call on its way, you can then press the # key or the Dial key or whatever your phone has that triggers an outbound call.

As a side note – # is a universal "launch this call now" key on all telephones. Use it whenever you dial an international call, for example, to save yourself 4-5 seconds of post dial delay.

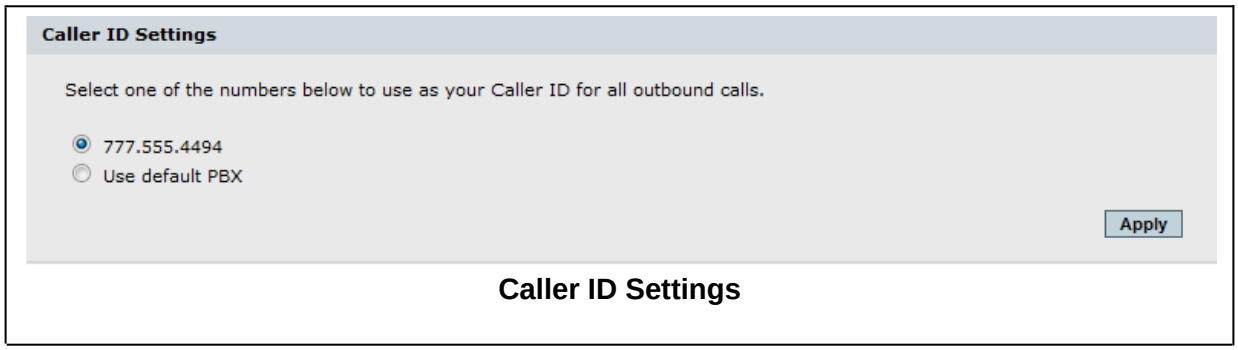
Note: Using code 99 would prevent parking calls if your PBX has 99 as the Call Park code. There are also other codes which are reserved by the PBX.

Features Tab

The **Features** tab allows you to further customize various settings and features including 7-Digit Calling set up, Voicemail Settings, Enhanced Services Settings (e.g., Do Not Disturb or Disable Call Waiting) and the Time Zone used to time-stamp your calls and voicemails.

Caller ID Settings

This is where you choose which of the numbers on your account, including the main number of your PBX, will be used as Caller ID on all your outbound calls. Make your selection and then click the **Apply** button in the Caller ID Settings area. You can come back and change this at any time, and the change is immediately effective.

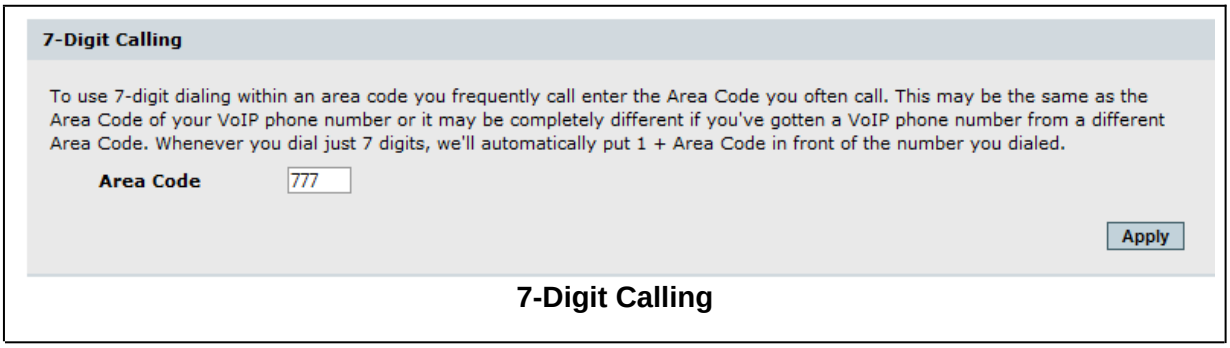


Caller ID Settings

7-Digit Calling

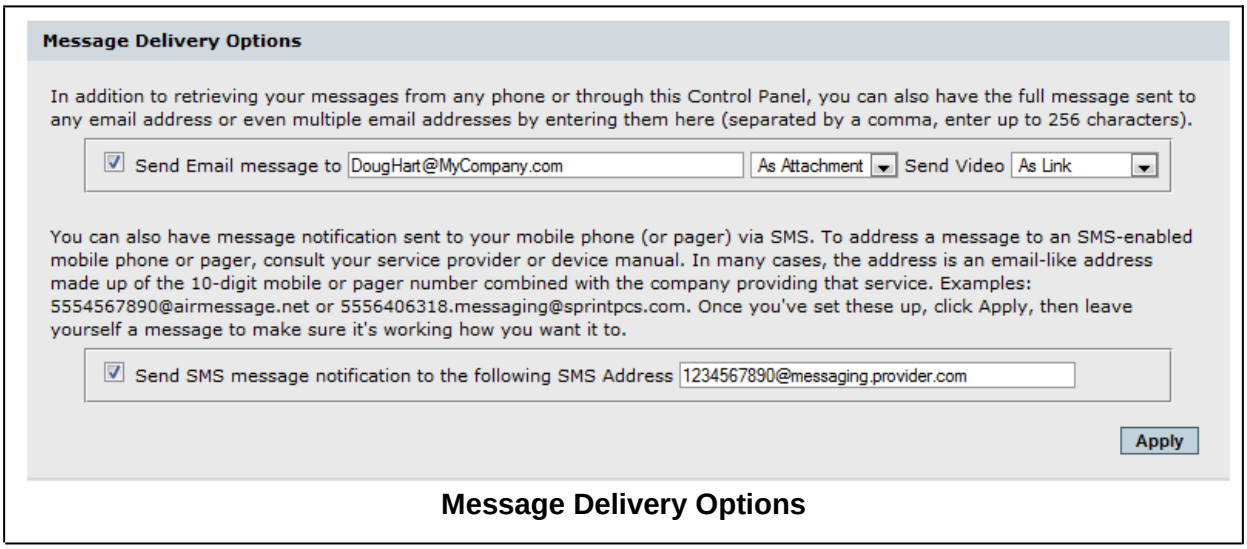
If you make a high percentage of your calls within a single area code of US or Canada, you can save yourself some key presses by leaving the country code field set to 1 and entering that area code in the second field.

It may be the area code of your VoIP phone number or it may be completely different. Whenever you dial just 7 digits, we automatically prepend these two fields (1 + area code) to the number you dialed. Click **Apply** to save your choice.



7-Digit Calling

Message Delivery Options



Message Delivery Options

In addition to retrieving voicemail from any phone or through the VCP, you can have the full voicemail sent to your email address as an MP3 attachment. This is also the easiest way to save your voicemail to your local computer. The email address field here identifies where voicemails (and faxes if you have IP-Fax service on a separate phone number) are sent.

You can also have a notification of each voicemail sent to your cell phone via SMS or to an alphanumeric pager. Pager and SMS notifications are sent to an address in the appropriate field just below the email field.

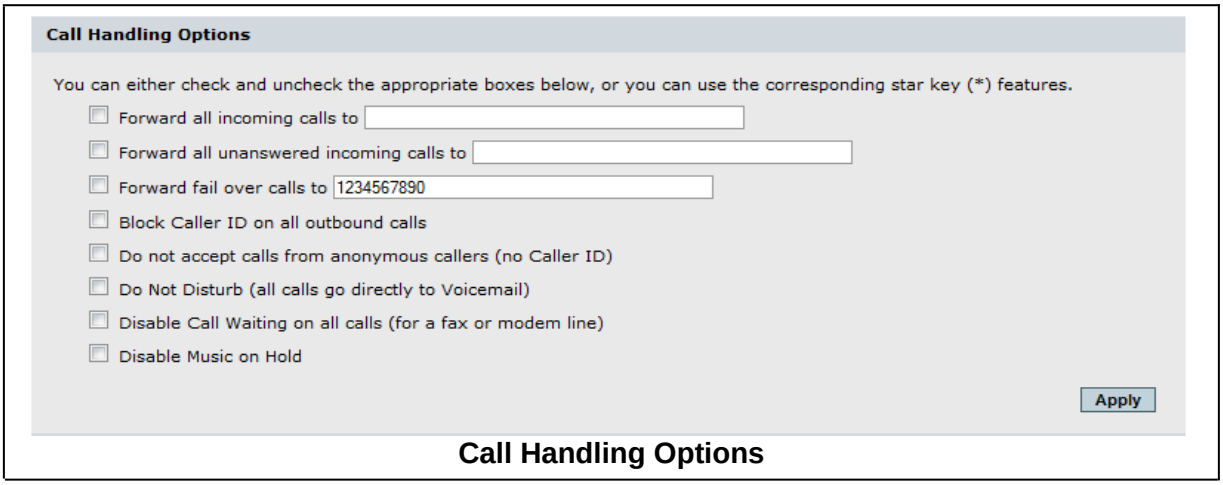
Changing your email address redirects your voicemail. This might be useful if you are traveling and don't have access to your regular email account.

Once set up is complete, click the **Apply** button and leave yourself a test voicemail to make sure it works as desired.

Call Handling Options

This area allows you to use check boxes to turn on and off certain star key (*) options, such as:

- Forward all incoming calls to a specific number.
- Forward all unanswered incoming calls to a specific number.
- Failover call forwarding, if your device is not registered (eg lost of internet or power) you can choose to forward to a specific number.
- Block Caller ID for all outbound calls.
- Do not accept calls from anonymous callers (no Caller ID).
- Enable Do Not Disturb
- Disable Call Waiting on all incoming calls on a fax or modem line.

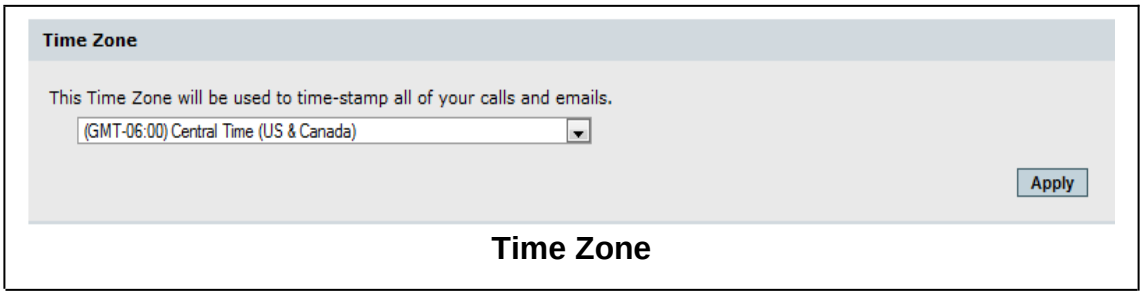


Call Handling Options

Click on the checkbox in front of the option or options you desire and then click the **Apply** button. To reverse the option, uncheck the box and click **Apply**.

Time Zone

This area displays your currently selected time zone, which is used to timestamp all your calls and voicemails. To change your time zone, select a new time zone from the drop down menu and click **Apply**. You can also see your time zone on the Account tab.



Time Zone

Star Codes

Besides using VCP to change the call handling option, you can use the call handling options by using the * key on your phone. See the following table for key information.

Note: Do not enter the voicemail system before using these numbers. Lift the handset and dial them as if you are dialing a regular phone number.

Table 6 - * Key Options Menu

Key	Option
*69	Place a call to the number from which you were last called.
*72<number>	Forward all calls to the number entered after 72.
*73	Cancel forwarding of all calls.
*92<number>	Forward all busy or unanswered calls to the <number> entered after 92.
*93	Cancel forwarding of all busy or unanswered calls.
*94<number>	Forward calls when registration failed to the number entered after *94
*95	Cancel forwarding fail over service
*67	Block Caller ID for all outbound calls.
*82	Unblock Caller ID for all outbound calls.
*67<number>	Block Caller ID for single call to <number>.
*82<number>	Unblock Caller ID for single call to <number>.
*77	Don’t accept calls from anonymous callers (no Caller ID).
*87	Accept calls from anonymous callers (no Caller ID).
*78	Turn on Do Not Disturb (all calls go directly to voicemail).
*79	Cancel Do Not Disturb.
*56	Enable Call Waiting on all calls for this device.
*57	Disable Call Waiting on all calls for this device (for a fax or modem line).
*70<number>	Disable Call Waiting only for this call to <number> (for a single fax or modem call).
*76<number>	Enable Call Waiting only for this call to <number>.
*31	Enable Call Waiting on all calls for all of your devices.
*30	Disable Call Waiting on all calls for all of your devices.
*21	Enable Music On Hold
*20	Disable Music On Hold

Support Tab

From the Support tab you can download add-ons such as softphones, dialers and products that enhance your VoIP service functionality. You will also find various manuals including manuals for application on the Applications Tab. In addition to downloads you may also have Reports available to you.

This tab will looks like this:

Support Tab

Applications Tab

From this tab you can start various web based applications. Documentation for these applications are on the Support tab.

Phone Book

The **Phone Book** allows you to display Mailboxes on the PBX, if your login credentials allow this access. You can also create a directory listing of the whole PBX in PDF format.

Attendant Console

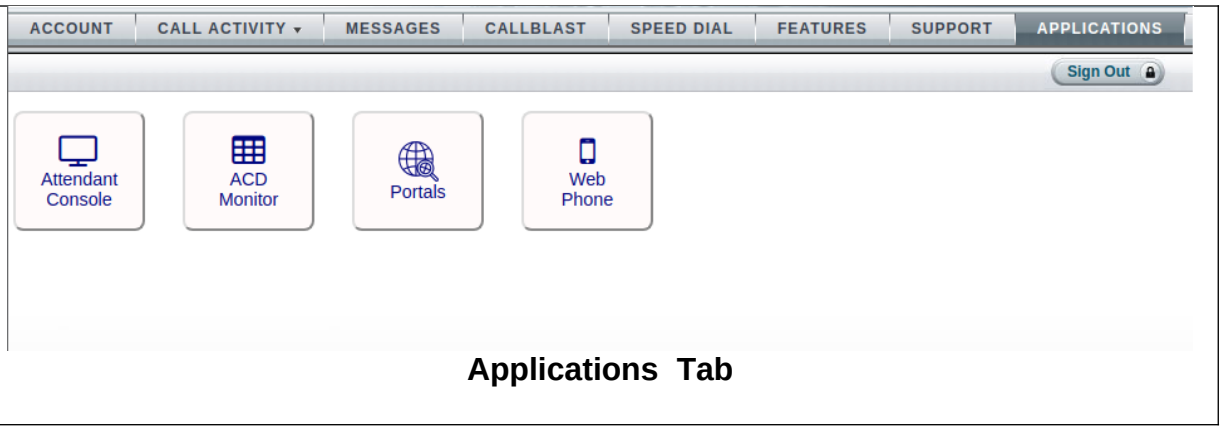
The **Attendant Console** includes the same features as the Phone Book but also allows you to monitor the status of Mailboxes and intercept calls on the PBX, if your login credentials allow this access.

ACD Monitor

The **ACD Monitor** allows an ACD supervisor to watch the activity of ACD Agent and ACD queues, if your login credentials allow this access.

Web Phone

The **Web Phone** allows you to use your web browser to make and receive phone calls, if your login credentials allow this access. Chrome and Firefox web browsers are compatible.



Applications Tab

911 Emergency Calling

Your PBX Administrator is responsible for setting your extension up to be able to dial 911 if an emergency arises.

Warning: 911 dialing is NOT automatic with your IP-PBX service. If your address has never been entered or you move and your Administrator does not change your 911 address, a 911 call from your IP-PBX phone may be significantly delayed or misrouted. You can always call 911 from a regular phone or from a cell phone.

For Further Information

If you have other questions about your IP-PBX service, please contact your PBX Administrator.