HOSTED PBX GET STARTED GUIDE

Step 1 – Add users

Step 2 – Setup phone numbers

Step 3 – Configure phones

Optional and End User features:
- Setup Voice Menu (Auto Attendant)
- Setup Hunt Groups
- Setup Lync Calling
- Setup Voice Mail
- Setup Find Me Follow Me (forward calls to another number)

GETTING STARTED WITH HOSTED PBX

The following overview helps you get started with your new Hosted PBX service. It includes links to more detailed technical information. The steps for setting up your Hosted PBX service include the following, which are detailed further in the subsequent sections.

1. Add users. Enable Hosted PBX service for existing users or create new users and enable Hosted PBX for them. **Note:** Your account is charged per user, per month each user comes with a phone number. Additional phone numbers are available at an additional cost.
2. Choose phone numbers. Choose phone numbers for your account and assign them to your users
3. Configure IP or soft phones for users.
4. Optionally, you can then set up auto attendant Voice Menu, Hunt Groups, and Music-on-Hold.
5. After the basic setup is complete, you can set up end-user features like voice mail and Find Me, Follow Me for your users or allow users to configure those settings in My Services.

For more information about setting up and managing Hosted PBX, please refer to the Hosted PBX section in our Knowledge Base.

MAIN FEATURES

## STEP 1: ADD USERS
To enable Hosted PBX for existing users:
1. Log in to End user Control Panel
2. Navigate to the **Users** menu on the left
3. Click the **Hosted PBX** tab
4. In the **Hosted PBX** column, select checkboxes for the users you wish to enable Hosted PBX *(as shown below)*
5. Click **Proceed** to apply changes *(as shown below)*

To enable Hosted PBX while creating a new user:

1. Log in to End user Control Panel
2. Navigate to **Users** menu on the left
3. Click **Create User** (as shown below)
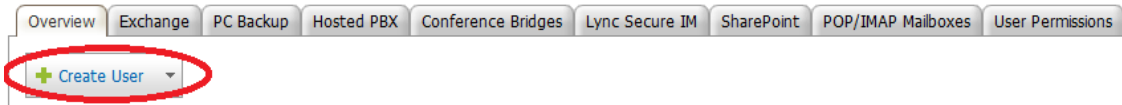
4. When setting up the user information, select the **Hosted PBX** checkbox in the **Services** list (as shown below) to enable Hosted PBX service for the new user. Please enter the Hosted PBX extension that this user will use at this point, if can be changed in the future:

5. After the user is created, navigate to the **Hosted PBX** tab for further actions; **Note:** You can also enable the Hosted PBX service for users during mass user import; **Note:** Each user with Hosted PBX service enabled will receive an email with information on how to configure their phones (see STEP 4)

STEP 2: SETUP PHONE NUMBERS

To set up phone numbers, you will first add phone numbers to your account and then assign them to your users. Make sure that Hosted PBX is enabled for each user to which you will assign a number (see STEP 1).

To add phone numbers to your account:
1. After completing Step 1, go to **Users** menu > **Hosted PBX** tab
2. Click **Phone Numbers** (as shown below)
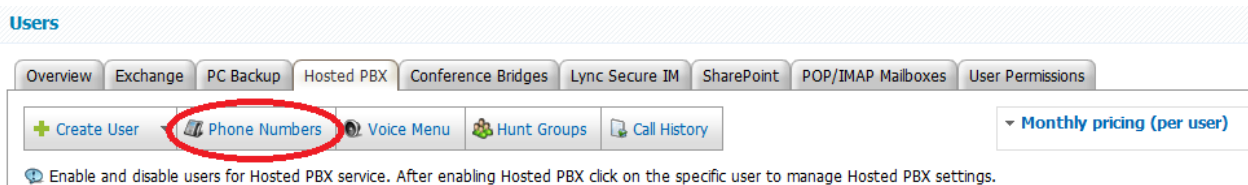
3. Click **Choose New Numbers** *(as shown below)*

4. In the **Choose Phone Numbers** pop-up, enter the quantity of phone numbers you want to create, and select the area code you want the new numbers to have *(as shown below)*. If you need to create numbers in different 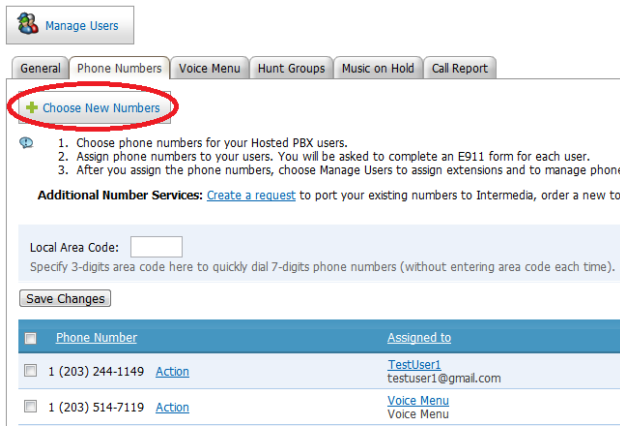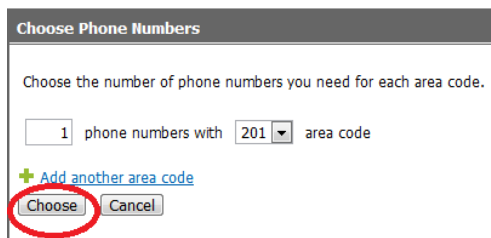area codes, click **+ Add another area code**. This adds another line where you can specify the quantity to add in a different area code. Note: . If you do not see the required Area Code, please contact Support.

5. Click **Choose** *(as shown below)*

6. You will now see the new numbers listed on the **Phone Numbers** tab.

Note: You can choose the area code to create numbers in, but the individual phone numbers will be automatically assigned.

To assign a phone number to a user:

1. After phone numbers as outlined in the steps above, you will see the list of phone numbers in **Hosted PBX** > **Phone Numbers**

2. Numbers which are available to be assigned to your Hosted PBX users will have an **Assign to** link in the **Action** column. To assign a phone number to a user, click **Assign to** for the desired number *(as shown below)*
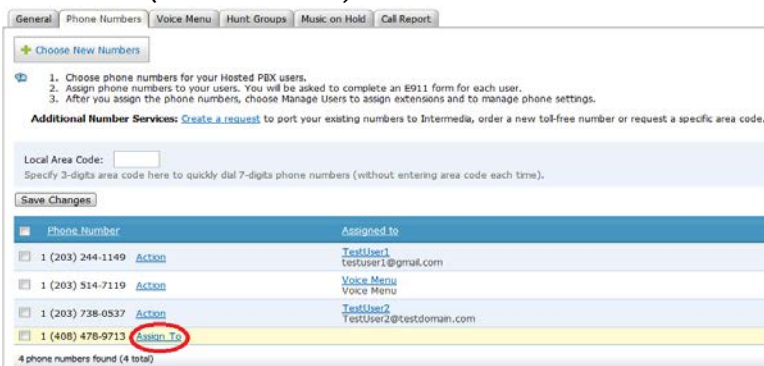
3. A new window will open asking where you'd like to assign the number to a User, Hunt Group or Voice Menu. Based on your selection, a new window will display a list of Hunt Groups, your Voice Menu or users who have Hosted PBX service enabled (If the desired user is not in the list, you need to first enable Hosted PBX for the user); Select a user to assign the phone number to and click **Select** *(as shown below)*
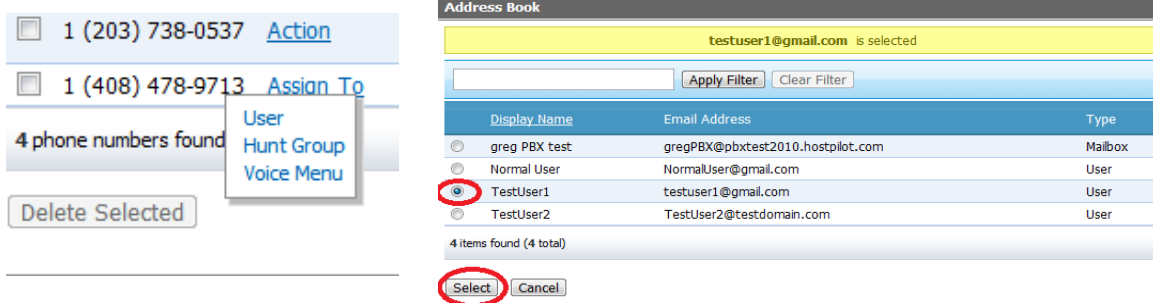
4. Complete the 911 location information by entering the address for this user and click **Accept & Save Changes** *(as shown below)*; **NOTE**: Make sure the address is complete and correct as this is the information that is provided to emergency services and is used when someone dials 911 from this phone.

5. You should now see the user's name in the **Assigned To** column for the phone number; **Note**: Each user can only have one phone number

STEP 3: CONFIGURE PHONES

At this point you have have enabled Hosted PBX for and assigned phone numbers and/or extensions to them. The next step is to configure IP desk phones or soft phones for each user so they can make and receive calls.

1. To configure a phone, you need to know the following information:
   - Phone device ID
   - Phone password
   - PBX server name

   This information is located in the **Edit Selected User** page for each user (**Users** > **Hosted PBX** > click on a user) and under **Settings** for a Phone Device. It is also sent by email to each user that has Hosted PBX service enabled.

2. The first phone device is created by default and is called "Phone #1." You can rename it and you can also create additional phone devices for each user by clicking **Add another phone device** link. You will need to create as many phone devices for each user for as many actual phones this user is going to use. For example, if a user has one IP desk phone at work, another IP desk phone at home and a soft phone installed on his or her computer, you should create three phone devices in HostPilot. Different device settings should be used to configure each phone.

3. To configure phone devices use Device Setup Instructions:

   - located in the **General Tab under Get Started**:

     - Choose your device and follow the steps based on your device and instructions or select a user for specific settings

4. Below are links to the Knowledge Base articles on setting up the types of phones supported by Voice Services. (Other IP phones, softphones or applications that support SIP protocol may be used, however we cannot guarantee they will work with Hosted PBX.)
   o Cisco/Linksys SPA IP phones
   o Polycom IP phones
   o X-Lite Soft phone

If you need to order IP desk phones, you can contact your Support desk.

OPTIONAL FEATURES

## SET UP A VOICE MENU (AUTO ATTENDANT)

A voice menu is an automated system that answers calls for your company and allows callers to navigate through a set of options by pressing keys on a touchtone phone. From the voice menu, calls can be directed to a specific user, to a hunt group (if configured) or callers can choose to dial a user's extension directly. You can only have one voice menu. The phone number for the voice menu is generated automatically after you select the area code of your main business operation location. The voice menu phone number will not be listed on the Phone Numbers tab and it cannot be assigned to users. The basic steps for setting up a voice menu are:

1. Enable the voice menu and generate a phone number for it
2. Set menu options that will correspond to the keys callers press
3. Record and upload a greeting, which tells callers what the menu options are
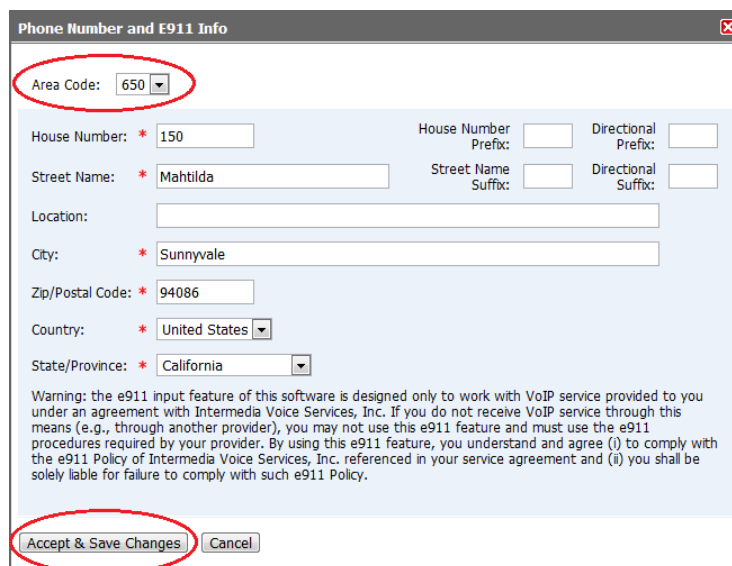
Note: If you want to redirect callers to a particular user and/or a hunt group, you will need to assign an extension to a user and/or create a hunt group before configuring the voice menu options.

To enable the Voice Menu:

1. Navigate to the **Hosted PBX** menu item on the left
2. Click on **Voice Menu**
3. Click **Enable Voice Menu** *(as shown below)*
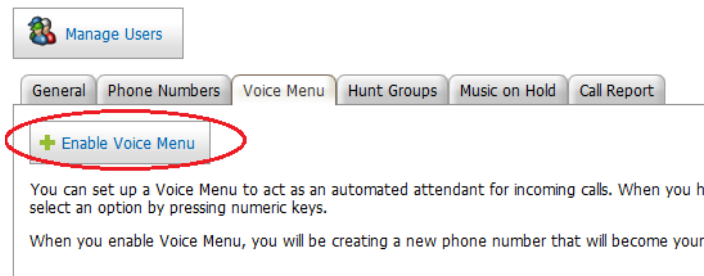
4. In the **Set Up Voice Menu** pop-up window, choose the **Voice Menu Area Code** *(as shown below)* – the area code for your primary business location; The phone number will be generated automatically in this area code (you cannot choose the number) and assigned to your voice menu
5. Enter the 911 location information; **NOTE**: Make sure the address is complete and correct as this is the information that is provided to emergency services *(as shown below)*
6. Click **Accept & Save Changes** *(as shown below)*

7. You are returned to the **Voice Menu** tab where you can configure your voice menu options; You can see the phone number that was generated for the voice menu in the **Voice Menu number** field *(as shown below)*

To set Voice Menu options:
1. On the lower half of the same page (**Hosted PBX** > **Voice Menu**), choose a phone key and select a desired action for it from the drop-down boxes (see the list below for all options); Repeat this action for each key you want to use as an option in the voice menu *(as shown below)*

Available Voice Menu actions are:

- **Forward to Hunt Group:** When selected, a box is displayed to the right that lists all existing hunt groups. Select a hunt group where calls should be redirected when a caller selects the corresponding key. (This option is not available if you do not have any hunt groups created. Follow instructions of the next section to create hunt groups.)
- **Forward to User:** When selected, a box is displayed to the right that lists all users who have an extension assigned. Select which user to redirect the call to when a caller pushes the corresponding key. (This option is not available if you do not have any users with extensions.)
- **Dial by Name Directory:** When selected, this option allows callers to select who they want to speak with without having to know their Extension number. When the Dial By Name feature is enabled, your caller will be asked to press the first few letters of the first or last name of the person they are trying to reach.
- **Forward to Company Voice Mail:** When selected, the assigned button will redirect the call to voice mail and the recorded messages will be sent to the email address set up for Voice Menu voice mail.
- **Play Announcement:** If you select this option, it will allow you to upload an announcement you have recorded, you are able to upload different announcements based on key selection.

2. When you have set the desired keys and actions, click **Save Changes**
3. You may want to call the voice menu phone number and make sure the options work as you want; You can also listen to the default greeting before you replace it with your own greeting.

NOTE: Direct Extension Dialing is always available in the voice menu. Callers can enter an extension at any time if they already know the extension they want to reach. The call will be transferred to the extension.

<u>**To record and upload a greeting**</u>:
1. Record and save your greeting using any voice recording program (like Windows Sound Recorder). To do this, you will need a microphone as well as headphones or speakers) or Text to Speech tools. The file must be in either .WAV or .OGG format and cannot be larger than 16 MB. A standard template for a voice menu greeting that you may want to refer to is below. Customize it based on your needs:
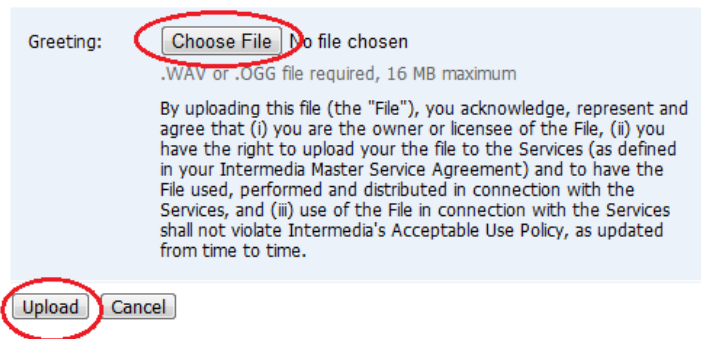
   Thank you for calling [Your Company Name]. Visit us on the web at www.your_web_site.com. If you know your party's extension, you may dial it at any time. Otherwise, please choose from one of the following options. For sales, press '1'. For customer service, press '2'. For purchasing or accounting, press '3'. For technical support, press '4'. If you would like to talk to the receptionist, press '0' and one of our friendly staff members will assist you shortly. Thank you for calling the [Your Company Name].

2. On **Hosted PBX** > **Voice Menu**, click the green replace greeting icon *(as shown below)*

   Greeting: greeting.ogg   Edit
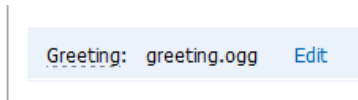
3. Click **Browse** to find the file on your computer *(as shown below)*
4. When choosing files to upload, be aware that you are responsible for copyright regulations and the Voice Services Acceptable Use Policy. Please read the agreement carefully and click **Upload** *(as shown below)*

   Upload Greeting

   Greeting: Choose File No file chosen
   .WAV or .OGG file required, 16 MB maximum

   By uploading this file (the "File"), you acknowledge, represent and agree that (i) you are the owner or licensee of the File, (ii) you have the right to upload your file to the Services (as defined in your Intermedia Master Service Agreement) and to have the File used, performed and distributed in connection with the Services, and (iii) use of the File in connection with the Services shall not violate Intermedia's Acceptable Use Policy, as updated from time to time.

   Upload Cancel

5. Call the Voice Menu phone number and listen to and confirm the greeting

NOTE: There is a default greeting for the voice menu, which is erased when you upload your own file. Make sure your greeting explains each option and corresponding key that you have set up. You may also want the greeting to explain that callers can dial an extension at any time, and that they can press the star key (*) to cancel or go back.

SET UP HUNT GROUPS

A **Hunt Group** is an automated way of handling incoming calls to specific groups in your organization. When callers dial a phone number that is assigned to a hunt group, their calls are automatically distributed to a group of *agents*. *Agents* are users who are members of a hunt group. Each hunt group can have any number of agents. Agents cannot change their own hunt group membership or hunt group settings. However, agents do need to log in to a hunt group in My Services so they can receive calls for the hunt group. In order to participate as a hunt group agent, a user must:

- Have Hosted PBX service enabled and a phone device configured
- Have an extension assigned
- Be assigned to the hunt group as an agent
- Log in to the hunt group

 To set up a hunt group, you need to:
1. Create the hunt group
2. Add agents to the hunt group
3. Set up a voice menu and forward calls to the hunt group (see instructions for the section above)
4. Optionally: set up music-on-hold

To create a hunt group:
1. Navigate to **Hosted PBX** > **Hunt Groups**
2. Click **Create Hunt Group** *(as shown below)*
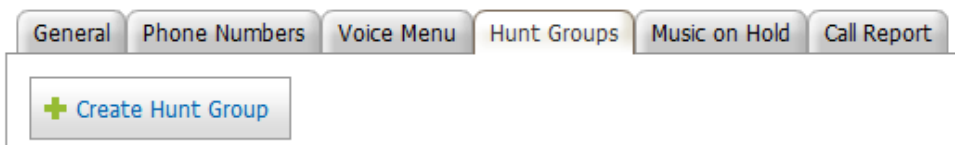
1. Enter the hunt group settings:

   o **Hunt Group Name:** Choose a meaningful name for the group, for example, *Sales* or *Customer Service*
   o **Extension:** Type a an extension that has not been already assigned to a user or another hunt group
   o **Ringing Order:** Select the way calls will be distributed among agents
      o **Longest Idle:** An incoming call goes to the agent who has not been on the phone for the longest period of time
      o **Round-Robin:** Distributes the calls in a sequential order, ringing each agent on the list until the call is answered
      o **Ring all:** An incoming call rings all agents at the same time until the call is answered by an available agent.
   o **Default Wrap-Up Time:** The number of seconds an agent is considered "unavailable" after hanging up the phone; Calls will not be directed to the agent during this time - this allows the agent to make notes and prepare for the next call

NOTE: You can create five hunt groups for your account as part of your plan. You may create additional hunt groups for an additional monthly charge.

Enable Email for Voice Mail: To Enable Voice Mail for the Hunt Group:

1. On the *Services > Hosted PBX > Hunt Groups* tab, click the name of the Hunt Group to open it for editing.
2. Check the box for **Enable email for voice mail**.
3. **Email for Voice Mail**: Enter the email address you want the voice mail sent.
4. **Timeout**: Enter the number of minutes the phone should ring before being sent to voicemail.
5. **Voice Mail Greeting**: To upload a new voice mail greeting click edit.

3. Click **Create** (If you are adding an additional hunt group, you will see a window with information about charges to your account for this hunt group; Click **Charge** to confirm)
4. You will be redirected to "Agents" tab of your new hunt group

To add agents to a hunt group:

1. To add agents to a hunt group:
   o Create a comma- or semicolon-separated list of display names or email addresses of users who will be agents of this group; Click **Check** to the right of the box to verify that they are correct
   o Alternatively, you can open an address book by clicking on the according book icon and select users from the list

2. Click **Add**; Specified users will be added to a list of agents for this hunt group at the bottom of the page

NOTE: In order to receive hunt group calls, agents need to be logged in to their hunt groups. Agents can log in to hunt groups through My Services, or you can log agents in and out of hunt groups from either the Hunt Groups page or the User Settings page *(as shown below)*.
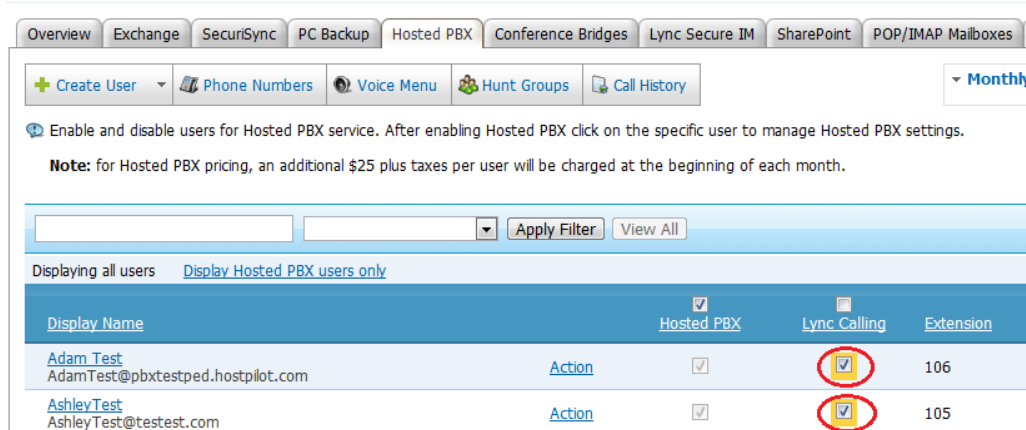
SET UP LYNC CALLING

The Lync Calling add-on integrates the Hosted PBX service with Microsoft Lync 2010. Users can click the Call button to automatically dial a selected contact in Lync. You may use Hosted PBX and/or Lync with or without Lync Calling.

If you want a user to have Lync Calling available:

- Both Lync and Hosted PBX must be enabled for a user
- Lync must be installed on user's PC and at least one phone device should be configured

To enable Lync calling for a user:

1. Navigate to **HostPilot > Users > Hosted PBX**
2. Check the **Lync Calling** box
3. Click **Proceed** at the bottom of the page
4. **Confirm** the charges

To make a call:

1. Find the contact name in Lync (type part of the name in the search box to see a list of matches).

2. Click the Call button to the right of the name.
   Optionally, click the down arrow next to the call button to see a list of phone numbers for this contact, and select which number to dial.

3. **Your phone will ring first.** After you answer your phone, Lync Calling will complete the call and ring the other party.

END USER FEATURES

SET UP VOICE MAIL

Calls are redirected to voice mail if they are not answered within 25 seconds. If the Find Me, Follow Me feature is set up for a phone (see instructions in the section below), calls are redirected to the forwarding numbers after 15 seconds, and then sent to voicemail after 30 seconds more. You cannot disable the voice mail system. When Hosted PBX service is enabled for a user, the voice mail PIN is generated automatically using four random numbers and sent to the user's primary email address. The user must enter this PIN when calling the voice mail number to check voicemail over the phone. Voice mail messages are also forwarded to the user's email address as attached sound files. The user must have headphones or speakers for listening to voice mail on the computer.

To change a PIN or an email address for voice mail using HostPilot:
1. Navigate to **Users** > **Hosted PBX**
2. In the list of users, click the display name of the user you want to work with
3. On **Edit Selected User** page, find the **Send Voice Mail To** field; the email displayed is the address where voicemail messages are currently sent to - You cannot view the current PIN
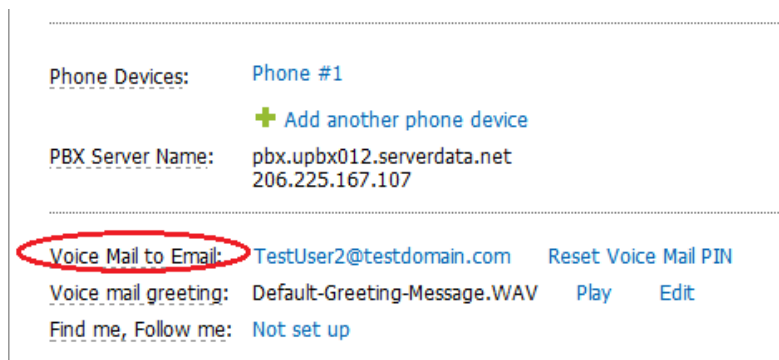
4. To change the email address for receiving voice mails, click **Edit** and type the new address and click **Save Changes**
5. To change the PIN for checking voice mail over the phone, click **Reset PIN,** in Reset Voice Mail PIN window, type the new PIN in both boxes, and click **Reset**; **Note**: The voice mail PIN can only contain digits 0 through 9

Note: All users with Hosted PBX service enabled receive email notifications with their default PINs. End-users can also update their voice mail PINs in My Services

To listen to voice mail messages:
- Voice mail messages are sent to users' email addresses specified in **Send Voice Mail To** section and can be listened to as .wav attachments
- Voice mails can be listened to by dialing user's extension or phone number from user's phone device; extension and PIN is required to listen to voice mails

SET UP FIND ME, FOLLOW ME (FORWARD CALLS TO ANOTHER NUMBER)

The Find Me, Follow Me option is used to redirect user's calls to up to 3 additional phone numbers. As an administrator, you can set up this feature for users in HostPilot or users can set up and manage their own settings through [My Services](#).

When Find Me, Follow Me is enabled, if a call has not been answered on the Hosted PBX device after 15 seconds, it rings to the Find Me, Follow Me phone numbers. If the call is not answered on a Find Me, Follow Me number within 30 seconds, it is redirected to your Hosted PBX voice mail.

To set up Find Me, Follow Me for a user:
1. Navigate to **Users** > **Hosted PBX**
2. In the list of users click the display name of the user you want to work with
3. On the **Edit Selected User** page, click **Edit** to the right of the **Find Me, Follow Me** field
4. In **Find Me, Follow Me** box,
    - Select the ringing mode (**Sequentially**: phones will ring in chosen order or **Simultaneously**: all phone numbers will ring at the same time)
    - Enter the desired phone number or numbers to forward unanswered calls to;
    - Enter the number including the area code and long-distance prefix (for example, 1 212-555-1234). Do not use parentheses, dashes, or other punctuation in the number.
    - Configure **Timeout** for:

        - **Sequentially** mode: The amount of time to wait before forwarding to the next number (after the last number, calls are forwarded to voice mail).
        - **Simultaneously** mode: The amount of time to wait before forwarding calls to voice mail.

5. Make sure the checkbox is selected next to each phone number in the **Edit** window *(as shown below)*

6. Click **Save Changes**