PBXACT

IP-PBX

User Guide

OVERVIEW:

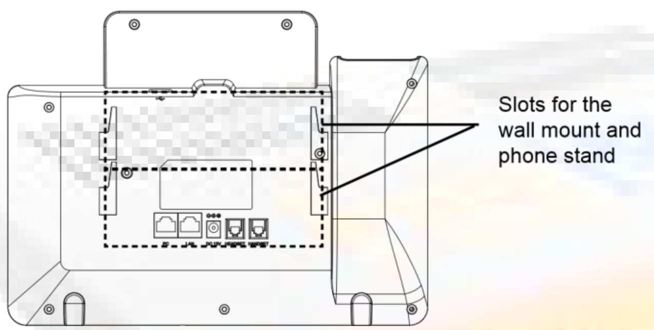
PBXact IP-PBX

PBXact is a product of Schmooze.com, a leader in creating PBX platforms. With PBXact, Schmooze.com has more than one million systems in production across the globe, with 20,000 new systems added each month. As an open source, web-based PBX solution, PBXact is easy to customize and adapt to your changing needs. PBXact can run in the cloud or on-site, and is currently being used to manage the business communications of all sizes and types of businesses from small one person SOHO businesses, to multi-location corporations and call centers. The PBXact EcoSystem provides you with the Freedom and Flexibility to custom design business communications around your needs.

Grandstream GXP2140 is a next generation enterprise grand IP Phone that features up to 4 lines, 4.3 inch LCD, 5 XML programmable context-sensitive soft keys, dual Gigabit network ports, integrated PoE and Bluetooth, 5-way conference, and Electronic Hook Switch(EHS). The GXP2140 also supports automated provisioning for easy deployment, advanced security protection for privacy, and broad interoperability with most 3rd party SIP devices and leading SIP/NGN/IMS platforms.GXP2140 is the perfect choice for enterprise users looking for a high quality, feature rich multiline executive IP phone with advanced functionalities and performance.

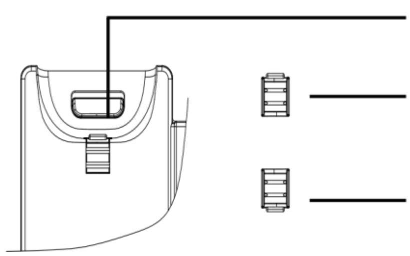
CONTENTS

PHONE SETUP:



Installing the Phone (Wall Mount):

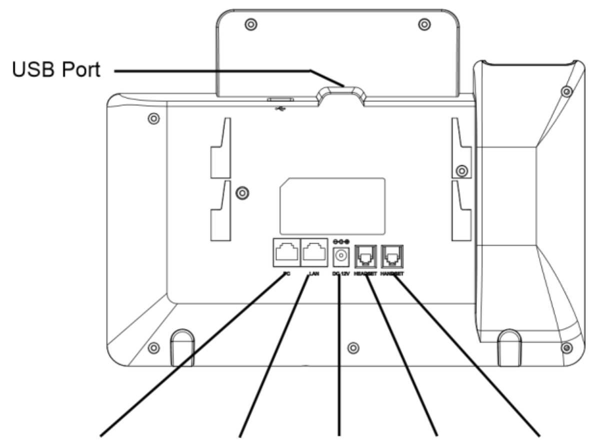
1. Attach the wall mount to the slot on the back of the phone.
2. Attach the phone to the wall via the wall mount hole.
3. Pull out the tab from the handset cradle (See figure below).
4. Rotate the tab and plug it back into the slot with the extension up to hold the handset while the phone is mounted on the wall (See figure below).



Installing the Phone (Phone Stand):

For installing the phone on the table with the phone stand, attach the phone stand to the bottom of the phone where there is a slot for the phone stand (upper part, bottom part).

CONNECTING THE PHONE:



PC Port LAN Port PowerHeadset Port Handset Port

To setup the GXP2140, follow the steps below:

1. Connect the handset and main phone case with the phone cord.
2. Connect the LAN port of the phone to the RJ-45 socket of a hub/switch or a router (LAN side of the router) using the Ethernet cable.
3. Connect the 12V DC output plug to the power jack on the phone; plug the power adapter into an electrical outlet.
4. The LCD will display provisioning or firmware upgrade information. Before continuing, please wait for the date/time display to show up.

GETTING TO KNOW GXP2140

IDLE SCREEN

GXP2140 screen displays differently depending on whether the phone is idle or in use (active). The following figures show the idle screen of GXP2140. Not all idle screens are the same, yours may appear differently.

Figure 4: GXP2140 Idle Screen

The following table describes the items displayed on the GXP2130/GXP2140/GXP2140 idle screen.

Table 9: LCD DISPLAY DEFINITIONS

DATE AND TIME	Displays the current date and time. It can be synchronized with Internet time servers.
NETWORK ICON	Shows the status of network. It will indicate whether the network is down or starting.
STATUS ICON	Shows the status of the phone for registration status, call features and etc, using icons as shown in the next table.
LINE STATUS INDICATOR	Displays the name of the account that is in use.

SOFTKEYS in Idle Screen	The softkeys are context sensitive and will change depending on the status of the phone. Typical functions assigned to softkeys are: • **SwitchSCR/NEXTSCR** Toggles between different idle screens. For example, for GXP2130/GXP2140/GXP2140, pressing most left soft key (switch screen) will toggle among default idle screen, weather information, currency information and Grandstream Upcoming Events; • **ForwardAll** Unconditionally forwards the phone line (account 1) to another phone. • **MissedCalls** Shows up unanswered calls to this phone. • **Redial** Redials the last dialed number when there is existed dialed call log.

Table 10: GXP2140 LCD ICONS

	**Network Status.** OFF - Network connection is up ON - Network connection is down
	**DND Status.** OFF - Do Not Disturb disabled ON - Do Not Disturb enabled
	**Call Forward All Status.** OFF - Call Forward All feature disabled ON - Call Forward All feature enabled
	Call Forward Busy Status. OFF - Call Forward Busy feature disabled ON - Call Forward Busy feature enabled

	Call Forward No Answer Status. OFF - Call Forward No Answer feature disabled ON - Call Forward No Answer feature enabled
	Call Forward Busy and Call Forward No Answer Status. OFF - Call Forward All and Call Forward No Answer feature disabled ON - Call Forward All and Call Forward No Answer feature enabled

	Missed Call Status. OFF - No missed call ON - New missed call
	Handset Status. OFF - Handset is not in use ON - Handset is in use
	Headset Status. OFF - Headset is not in use ON - Headset is in use
	Microphone MUTE Status. OFF - No muted ON - Muted
	Bluetooth Status. (GXP2130v2/GX2140/GXP2140) OFF - Bluetooth icon disappears ON - Bluetooth icon appears Paired – Bluetooth icon turns bright
	USB Status. (GX2140/GXP2140) OFF - No USB connection ON - USB connected
	Incoming Call. The current call is an incoming call

	**Outgoing Call.** The current call is an outgoing call
	**Call On Hold.** OFF - No call on hold ON – Call on hold
	**Call Connect.** OFF - No call ON - Call connected
	**Call Conference.** OFF - No Conference call ON - Conference call is established
	**Click Hand** In call screen, this icon shows on the line available for transfer or conference.
	**IP Call Status** The current call is an IP call.
	**SIP Call** Enter number for initiate call. The current call is a SIP call.
	**Call Time** During an active call, this icon shows the call time.
	**LCD Brightness Up** Brightness is increasing
	**LCD Brightness Down** Brightness is decreasing
	**Speaker Volume Up** Call screen icon. Speaker volume is increasing

	**Speaker Volume Down** Call screen icon. Speaker volume is decreasing
	**Handset Volume Up** Call screen icon. Handset volume is increasing
	**Handset Volume Down** Call screen icon. Handset volume is decreasing
	**Ringtone Volume Down** Call screen icon. The volume of ringtone is decreasing
	**Ringtone Volume Up** Call screen icon. The volume of ringtone is increasing
	**Ringtone Volume Up** Call screen icon. The volume of ringtone is increasing
	**Ringtone Volume Down** Call screen icon. The volume of ringtone is decreasing
	**VOC status** Call screen icon. OFF - VOC is off. ON - VOC is on.

USING THE KEYPAD

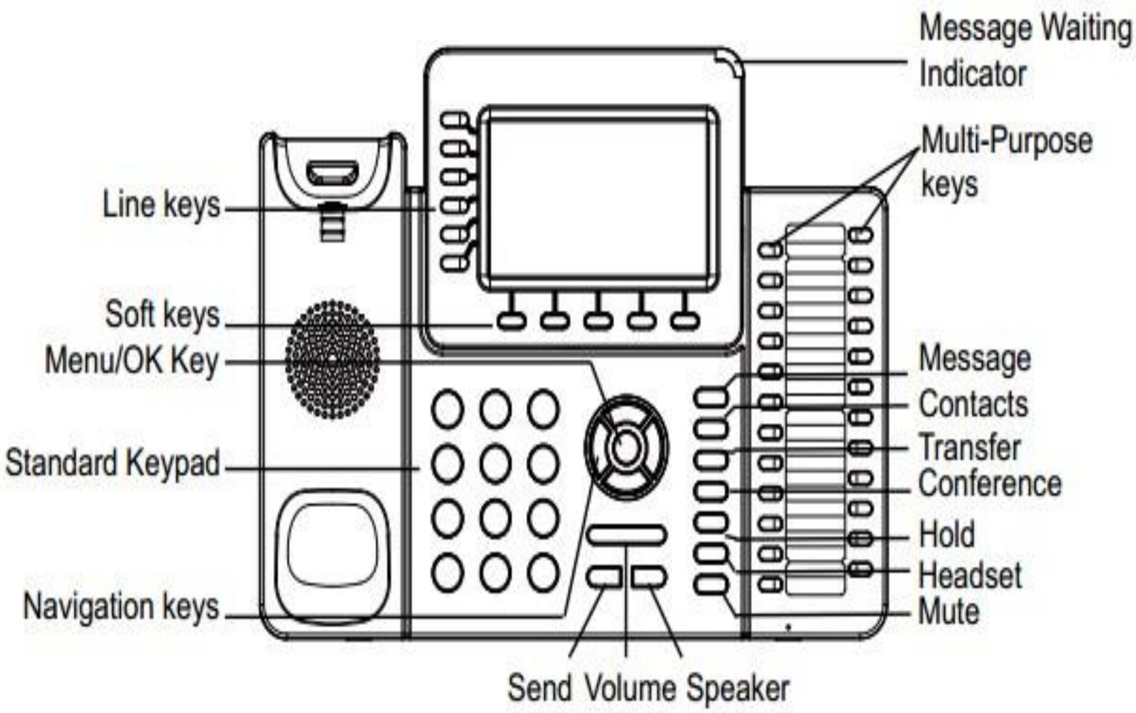
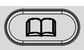
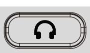
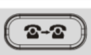


Table 11: GXP2130/GXP2140/GXP2140 KEYPAD BUTTONS

	**Contacts**. Press to view and edit contact information.
	**Hold**. Press to put call on hold or resume the call.
	**Mute**. Press to mute or unmute the call.
	**Headset**. Press to switch to headset mode.
	**Message**. Press to view voicemail messages.
	**Transfer**. Press to transfer call.
	**Conference**. Press to conference call.
	**Speaker**.
	**Send/Redial**.
	**Volume**.
	**Up Navigation key.** In idle screen, press to see the IP.

MAKING PHONE CALLS

HANDSET, SPEAKER AND HEADSET MODE

The GXP2140 allows users to switch among handset, speaker or headset when making calls. Lift the handset; press the Headset button to switch to headset; or press the Speaker button to switch to speaker. COMPLETING CALLS

There are several ways to make a call.

On hook dialing. Enter the number when the phone is on hook and then send out.

- When the phone is in idle, enter the number to be dialed out; or

- Take handset off hook; or
  - Press Speaker button; or
  - Press Headset button with headset plugged in; or
  - Select the Dial soft key:
- The call will dial out

Off hook and dial. Off hook the phone, enter the number and send out.
- Take handset off hook; or
  - Press Speaker button; or
  - Press Headset button with headset plugged in; or
  - Press an available LINE key to activate speaker;
- You shall hear dial tone after off hook;
- Enter the number;
- Press SEND key or # to dial out.

Redial. Redial the last dialed number.
- Take handset off hook; or
  - Press Speaker button; or
  - Press Headset button with headset plugged in; or
  - Press an available LINE key to activate speaker;
    or When the phone is in idle;
- Press SEND key, or the REDIAL soft key.

Via Call History. Dial the number logged in phone's call history.
- Press MENU button to bring up the main menu;
- Enter Call History;
- Select the entry you would like to call using the navigation arrow keys; Press SEND button to dial out.

ANSWERING PHONE CALLS

RECEIVING CALLS

- **Single incoming call**. Phone rings with selected ring tone. The corresponding LINE key will flash in red. Answer call by taking handset off hook, or using Speaker/Headset, or pressing the flashing LINE key;
- **Multiple incoming calls**. When another call comes in while having an active call, the phone will produce a Call Waiting tone (stutter tone). The other LINE key will flash in red. Answer the incoming call by pressing the flashing LINE key. The current active call will be put on hold automatically.

DO NOT DISTURB

Do Not Disturb can be enabled/disabled from phone's Speed Dial keys by following the steps below:

Press the Speed Dial key labeled as DND, or.

- Press the Menu button and select "Preference" using navigation keys;
- Press Menu button again to get into Preference options;
- When "Do Not Disturb" is highlighted, press Left/Right key to disable/enable DND; Press “Save” soft key to save the change.

When Do Not Disturb feature is turned on, the DND Multipurpose key will appear red. The incoming call will not be accepted or the call will directly go into voicemail.

DURING A PHONE CALL

CALL WAITING/CALL HOLD

- **Hold**. Place a call on hold by pressing the HOLD button. The active LINE key will blink in green;
- **Resume**. Resume call by pressing the blinking LINE key;
- **Multiple calls**. Automatically place active call on hold or switch between calls by pressing the LINE key. Call waiting tone (stutter tone) will be audible on new incoming call during the active call.

MUTE

During an active call, press the MUTE button to mute/unmute the microphone. The LCD will show the Mute icon on the top of screen, when the call is muted.

CALL TRANSFER

GXP2140 supports Blind Transfer and Attended Transfer.

Blind Transfer.

- During the first active call, press TRANSFER and dial the number to transfer to;
- Press SEND key or # to complete transfer of active call.

Attended Transfer.

- During the first active call, press LINE key. The first call will be put on hold;
- Enter the number for the second call in the new line and establish the call;
- Press TRANSFER;
- Press the other LINE key which is on hold to transfer the call.

Transfer to Voice Mail.

- During the first active call, press TRANSFER and dial the Voice Mail Direct Dial Prefix "*" and the extension number to transfer to;
- Press SEND key or # to complete transfer of active call.

4-WAY/ 5-WAY CONFERENCING

GXP2140 can host up to 5-way conference call. You may also use the Conference Bridge feature part of PBXact phone system. To see how look further down.

Easy Conference Mode, which can be used combined with the traditional way to establish the conference.

Initiate a conference call.

- Establish 1 call;
- Press CONF key and a new line will be brought up using the same account;
- Dial the number and press SEND key to establish the second call;
- Press CONF key or press the ConfCall softkey to establish the conference.

Join more parties in established conference call.

- Establish conference call;
- Press CONF key and a new line will be brought up using the same account;
- Dial the number and press SEND key to establish the second call;
- Press CONF key or press the ConfCall softkey to join the new party in the established conference.

Split and Re-conference.

- During the conference, press HOLD key. The conference call will be split and both calls will be put on hold separately with 2 LINE keys blinking in green;
- Select 1 LINE key and press to resume the 2-way conversation;
- If users would like to re-establish conference call, before 1 separate LINE is selected, press the ReConf softkey right after the conference call is split.

Cancel Conference.

- If users decides not to conference after establishing the second call, press EndCall softkey instead of the ConfCall softkey/CONF key;
- This will end the second call and the screen will show the first call on hold.

End Conference.

- Press HOLD key to split the conference call. The conference call will be ended with both calls on hold; Or

- Users could press the EndCall softkey or simply hang up the call to terminate the conference call.

Note:

The party that starts the conference call has to remain in the conference for its entire duration, you can put the party on mute but it must remain in the conversation. Also, this is not applicable when the feature "Transfer on Conference Hang-up" is turned on.

The option "Disable Conference" has to be set to "No" to establish conference.

When using **Easy Conference Mode**, use SEND key to dial out the second call instead of using #, even when # could be used as SEND in normal phone calls.

Conference Bridge

PBXact in addition to Grandstream features also has Call Conference capabilities. Called Conference Bridge. With Conference Bridge you can easily setup Conference Calls similar to websites like “GoToMeeting”.

To setup a Conference Bridge.

- During the active call, press TRANSFER and dial 7101. The only limitation to the number of members you can add to the Conference Bridge is the number of open channels or lines you have going to your system.
- Press SEND key or # to complete transfer.
- The system will ask for a PIN number: 36742
- The system will have the caller say their name.
- Then the system will announce how many caller are in the Conference Bridge.
- The Caller will then enter into the Conference Bridge.
- While in the Conference Bridge the user can press the “*” key to access the menu. Please see the following for more information.

Conference User Guide

Meetme Menus if enabled (press * to access the menu)

DIGIT	ADMIN USER	NON-ADMIN USER
1	Mute/Un-Mute Self	Mute/Un-Mute Self
2	Lock/Unlock Conference	Disabled
3	Eject last user who joined conference	Disabled
4	Decrease Listen Volume of Conference with each 4 you press - end with 8	Same for user
5	Disabled	Disabled
6	Increase Listen Volume of Conference with each 4 you press - end with 8	Same for user
7	Decrease Talk volume - end with 8	Same for user

DIGIT	ADMIN USER	NON-ADMIN USER
8	More options menu (see below) / End volume adjustment	Exit this menu / End volume adjustment
9	Increase Talk volume - end with 8	Same for user
0	Disabled	Disabled
*	Play menu options	Same for user
#	Disabled	Disabled
	"8" MORE OPTIONS MENU FOR ADMINISTRATORS	
1	List users currently in the conference	
2	Kick out all non-administrator users	
3	Mute or unmute all non-administrator users	
4	Record this conference	

Paging & Intercom Module

What is the Paging & Intercom Module used for?

The Paging & Intercom Module is used to set-up an extension number that your users can dial in order to place an intercom call to multiple phones on your system at the same time.

For example, in a small office you might set-up a Page Group with extension number "00." When 00 is dialed by a local user, all of the phones in the office would go off-hook, and you could speak to everyone at every extension at the same time. Alternatively, you could set-up Page Groups with different extension numbers for each department in the office, i.e. 100 for Sales, 110 for Service, and so on.

How Do I Use the Paging & Intercom

To Page throughout the Office.

- ➢ Take handset off hook; or
  - Press Speaker button; or
  - Press Headset button with headset plugged in; or
  - Press an available LINE key to activate speaker;
- ➢ Dial “4” from the dial pad.
- ➢ Press SEND key or # to complete the page.

To Intercom another extension on the system.

- ➢ Take handset off hook; or
  - Press Speaker button; or
  - Press Headset button with headset plugged in; or
  - Press an available LINE key to activate speaker;
- ➢ Dial *80 + extension number.
- ➢ Press SEND key or # to complete the page.

On some systems all you have to do is press the associated DSS/BLF key of the extension you wish to reach.

Call Park

To set Call Park.

- During the active call, press TRANSFER and dial 70.
- Press SEND key or # to complete transfer of active call the first Park location.
- The system will announce which Call Park location the Call is in.

Answer Call Park.

- Press the associates Call Park Feature Key, or.
- Dial the Call Park Location manually, normally 71-78, yours may be different. Check with your Administrator for more information.
- You will hear a splash tone when you have successfully pick up a parked call.

Voicemail User Guide

How to access your Voicemail

To check your voicemail from outside the office:

- Dial phone number 947-3054
- Wait for the IVR/Automated Attendant to answer;
- Dial *98;
- Enter your Extension number
- Enter your Password.

To check your voicemail from your phone:

- Press the Voicemail button , or dial *97 from your phone;
- Enter your Password.

To check your voicemail from a different phone in the office:

- Dial *98;
- Enter your Extension number
- Enter your Password.

Voicemail Main Menu

To listen to the current Voicemail press 1

While listening to a Message you can execute the following commands:

- Play Previous Message press 4
- Play next message press 6
- Forward Message press 8
- Fast Forward 3 seconds press #
- Repeat current message press 5
- Delete current message press 7
- Save current message press 9
- Rewind 3 seconds press *

After listening to all of your Messages you can execute the following commands:

- Play Previous Messages press 4
- Play next message press 6
- Forward Message press 8
- To exit press #
- Repeat current message press 5
- Delete current message press 7
- Save current message press 9
- For help press *

To Change Voicemail Folders press 2

You can pick which folder you would like to listen to voicemails in:

- Place a call press 4
- To leave Voicemail for other user press 5
- To return to the Main Menu press *

For Advanced Options press 3

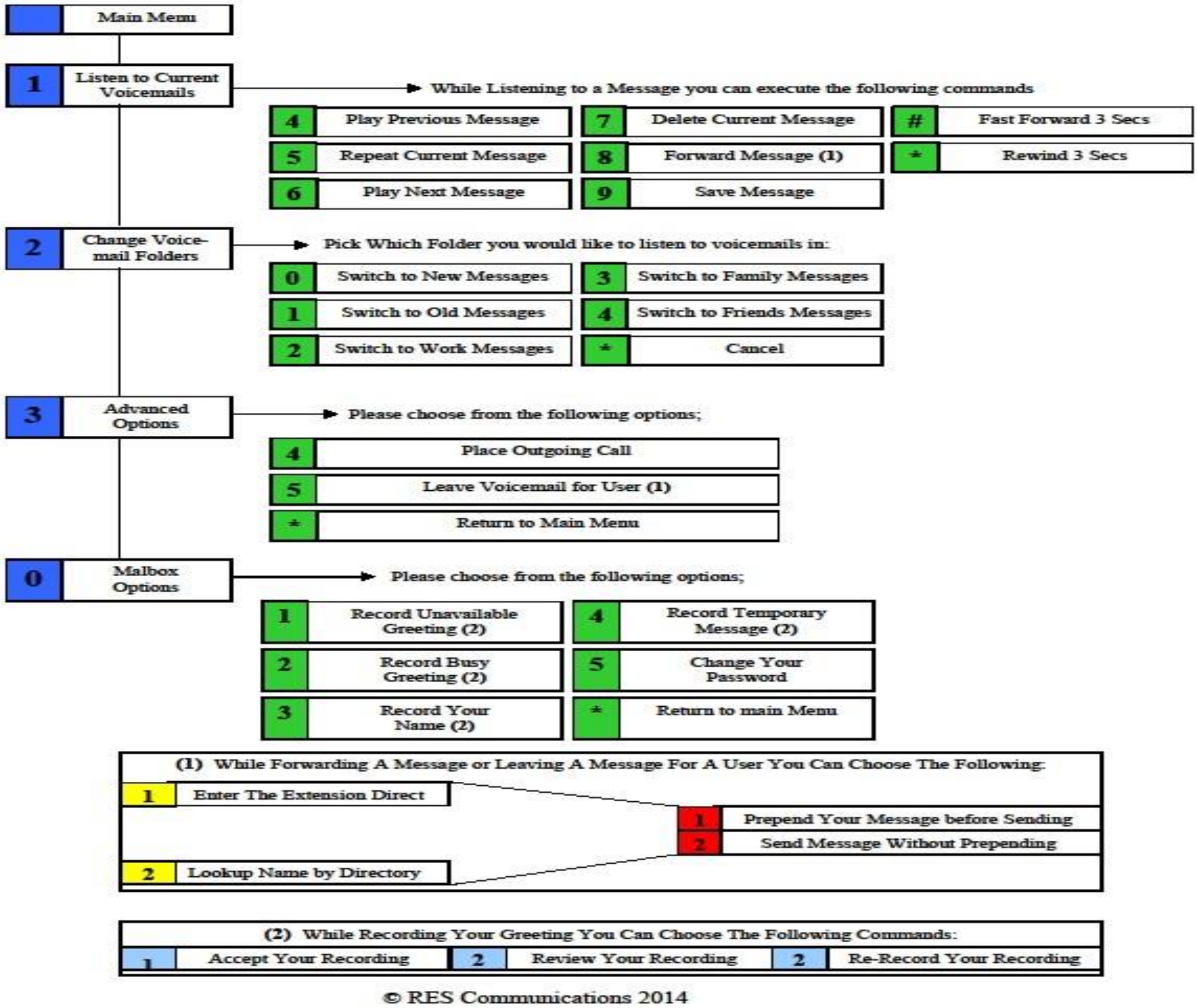
You can choose from the following options:

- To Place outgoing call press 0
- To leave voicemail for another user press 1
- To return to the main menu press *

For Mailbox Options press 0

Please choose from the following options:

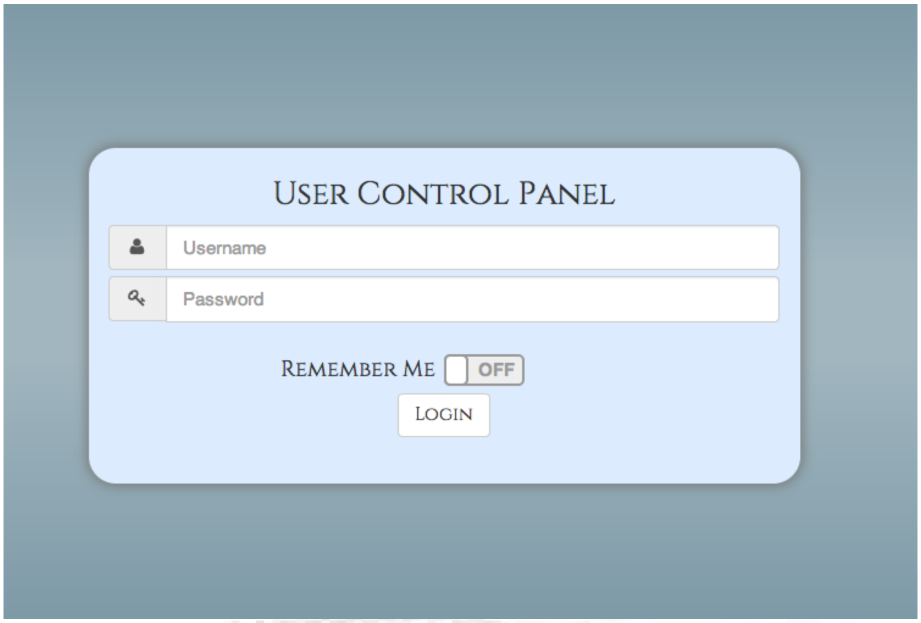
- To record your unavailable greeting press 1
- To record your Busy Greeting press 2
- To record your name press 3
- To record your Temporary Message press 4
- To Change your Password press 5
- To return to the main Menu press *



User Control Panel

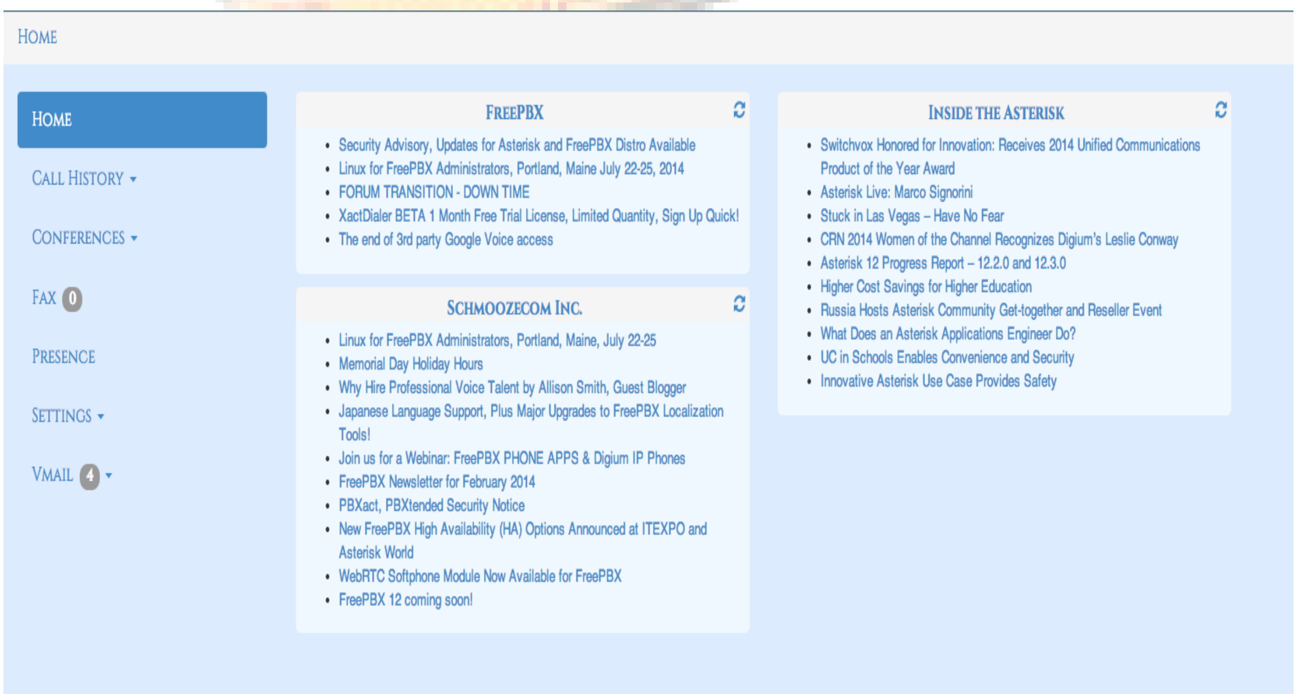
The user control panel is a way for users to control call handling and personal settings from a web browser. You can login to the User Control Panel by pointing your browser to the IP Address of your PBX and picking the User Control Panel Option. Administrators can login using the admin username and password that is used to access the PBXact Administration section. Individual users can login using their extension number and voicemail password.

The Login Screen is where you enter your user name and password. Normally your extension number and voice mail password.



Home Page

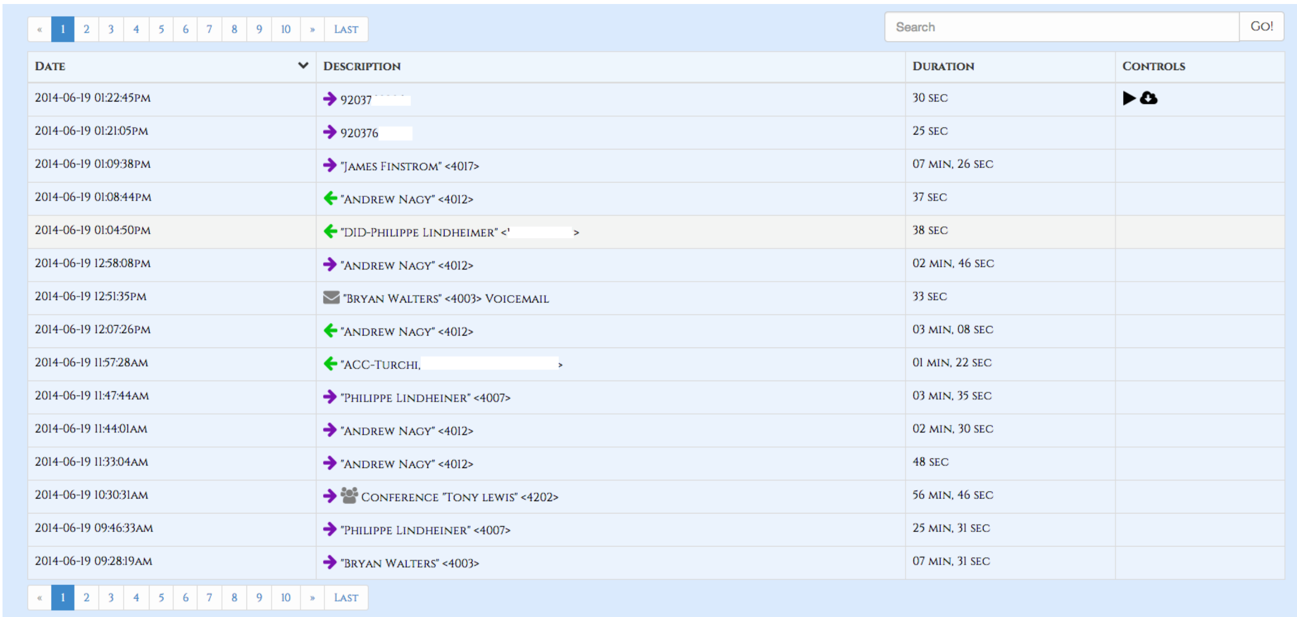
The Home page is where we land each time we log into UCP. From here you can access your Call History, Conference Rooms, Device Management, FAX management, Presence setting for your extension, Settings like Follow Me and DND, and Voice Mail messages. To the top right of your Home Page



Call History

The Call History section allows you to see all inbound and outbound calls for your user and listen to any call recordings that are associated with that call.

Usage



DATE	DESCRIPTION	DURATION	CONTROLS
2014-06-19 01:22:45PM	92037	30 SEC	
2014-06-19 01:21:05PM	920376	25 SEC	
2014-06-19 01:09:38PM	"JAMES FINSTROM" <4017>	07 MIN, 26 SEC	
2014-06-19 01:08:44PM	"ANDREW NAGY" <4012>	37 SEC	
2014-06-19 01:04:50PM	"DID-PHILIPPE LINDHEIMER" <" >	38 SEC	
2014-06-19 12:58:08PM	"ANDREW NAGY" <4012>	02 MIN, 46 SEC	
2014-06-19 12:51:35PM	"BRYAN WALTERS" <4003> VOICEMAIL	33 SEC	
2014-06-19 12:07:26PM	"ANDREW NAGY" <4012>	03 MIN, 08 SEC	
2014-06-19 11:57:28AM	"ACC-TURCHI, >	01 MIN, 22 SEC	
2014-06-19 11:47:44AM	"PHILIPPE LINDHEINER" <4007>	03 MIN, 35 SEC	
2014-06-19 11:44:01AM	"ANDREW NAGY" <4012>	02 MIN, 30 SEC	
2014-06-19 11:33:04AM	"ANDREW NAGY" <4012>	48 SEC	
2014-06-19 10:30:31AM	CONFERENCE "TONY LEWIS" <4202>	56 MIN, 46 SEC	
2014-06-19 09:46:33AM	"PHILIPPE LINDHEINER" <4007>	25 MIN, 31 SEC	
2014-06-19 09:28:19AM	"BRYAN WALTERS" <4003>	07 MIN, 31 SEC	

For each Call record we have the following

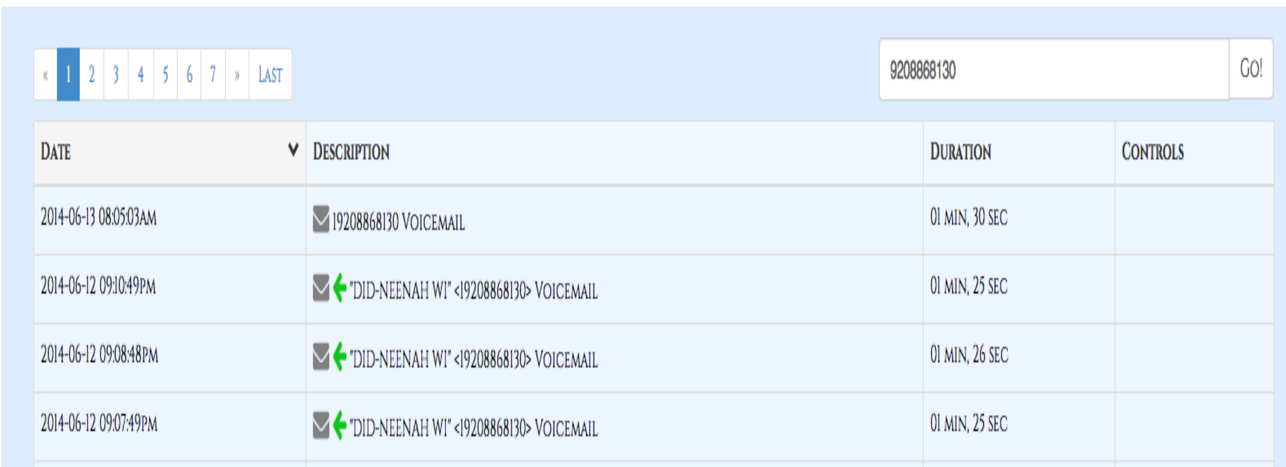
- **Date**- Date and Time call was received or placed.
- **Description**-For each call we have the following icons under the Description
- **Duration**- Length of call in Hours- Minutes-Seconds
- **Controls**- If the call has a Call Recording associated with it you will get a play and download icon for the Call Recording.

You can search for any call by using the Search bar at the top and putting in the number of the person you called or who called you and pressing GO **Duration**- Length of call in Hours- Minutes-Seconds

ICON	MEANING
	Outbound Call
	Inbound Call

ICON	MEANING
	Call went to Voicemail
	Call to Conference Room

You can search for any call by using the Search bar at the top and putting in the number of the person you called or who called you and pressing GO



Conferences - UCP

Usage

Empty

When the conference room is empty you will see the page below

Users Present

When users are present you will see users and be able to perform various actions on those users

Mute User

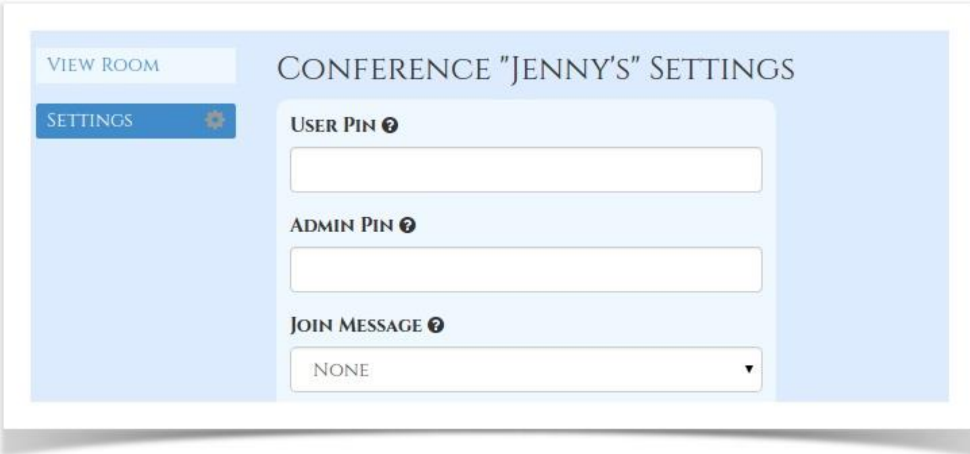
To mute a user click the "speaker" icon next to their name.

Kick User

To remove a user from the conference click the "**X**" next to their name. The system will inform them they have been kicked then drop them.

Settings

On this tab you can change settings for the chosen conference room.



User Pin

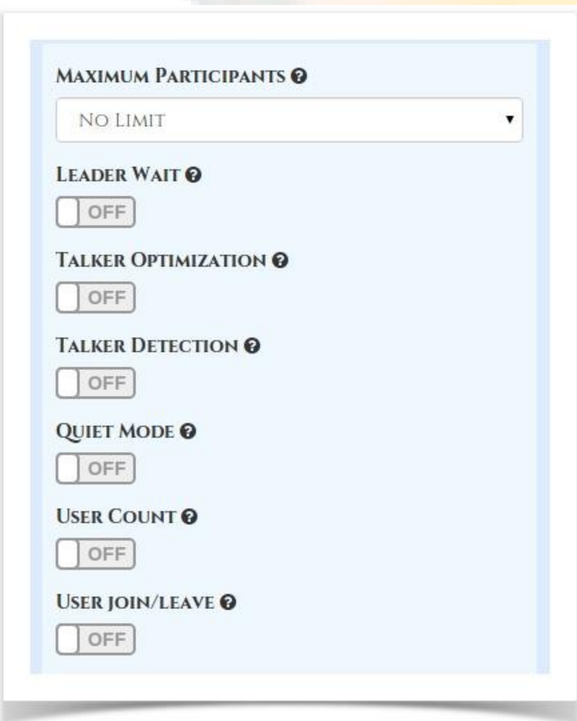
You can require callers to enter a password before they can enter this conference. Leave this blank for none

Admin Pin

Enter a PIN number for the admin user.

Join Message

A message to be played to the caller before joining the conference.



Leader Wait

Wait until the conference leader (admin user) arrives before starting the conference.

Talker Optimization

Turns on talker optimization. With talker optimization, Asterisk treats talkers who are not speaking as being muted, meaning that no encoding is done on transmission and that received audio that is not registered as talking is omitted, causing no buildup in background noise

Talker Detection

Sets talker detection. Asterisk will sends events on the Manager Interface identifying the channel that is talking. The talker will also be identified on the output of the meetme list CLI command.

Quiet Mode

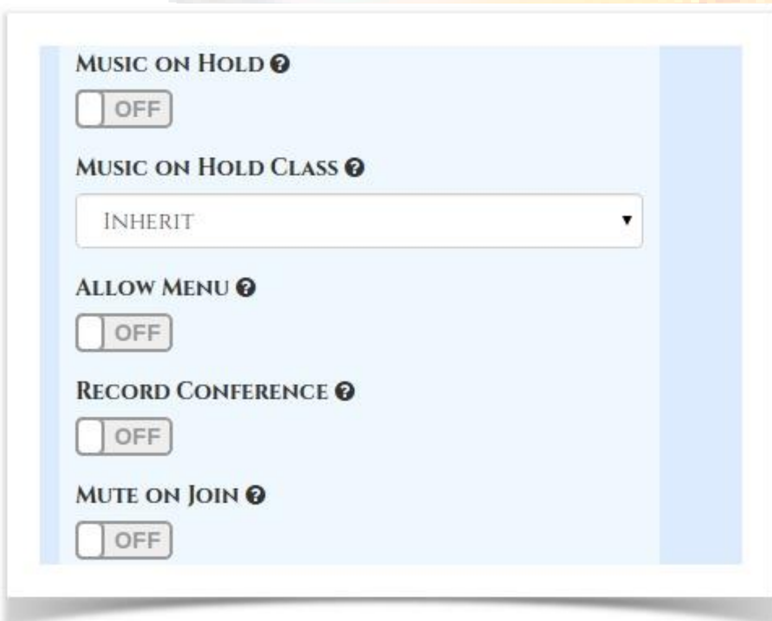
Quiet mode (do not play enter/leave sounds)

User Count

Announce user(s) count on joining conference

User Join/Leave

Announce user join/leave



Music On Hold

Enable Music On Hold when the conference has a single caller

Music On Hold Class

Music (or Commercial) played to the caller while they wait in line for the conference to start. Choose "Inherit" if you want the MoH class to be what is currently selected, such as by the inbound route.

Allow Menu

Present Menu (user or admin) when '*' is received ('send' to menu)

Record Conference

Record the conferences.

Mute on Join

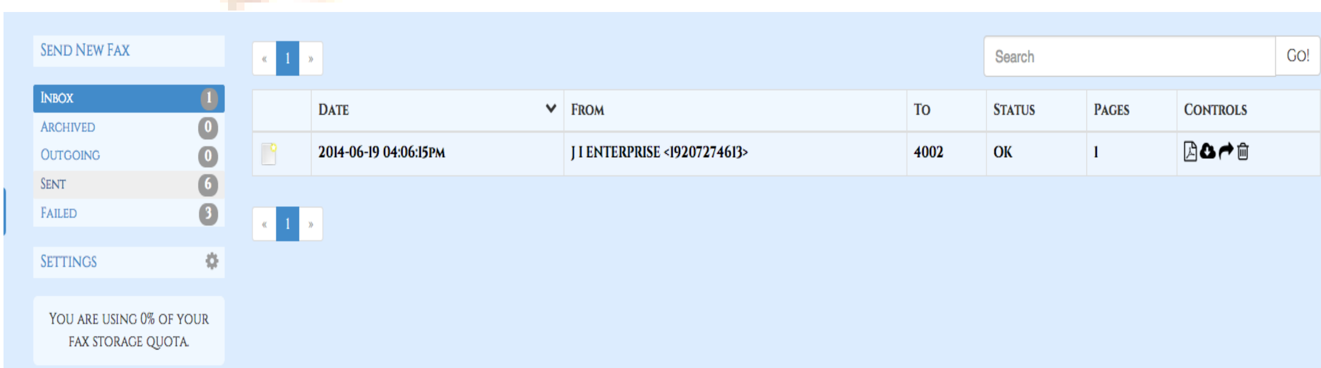
Mute users when they enter the conference

Fax - UCP

Viewing Faxes

Faxes can be filed under the following Folders

- **Inbox**- These are faxes that have not been viewed yet.
- **Archived**- These are faxes that you have viewed but not deleted.
- **Outgoing- F**axes that are in progress of being sent.
- **Sent**- Faxes that have successfully sent.
- **Failed**- Faxes that were sent and failed out.

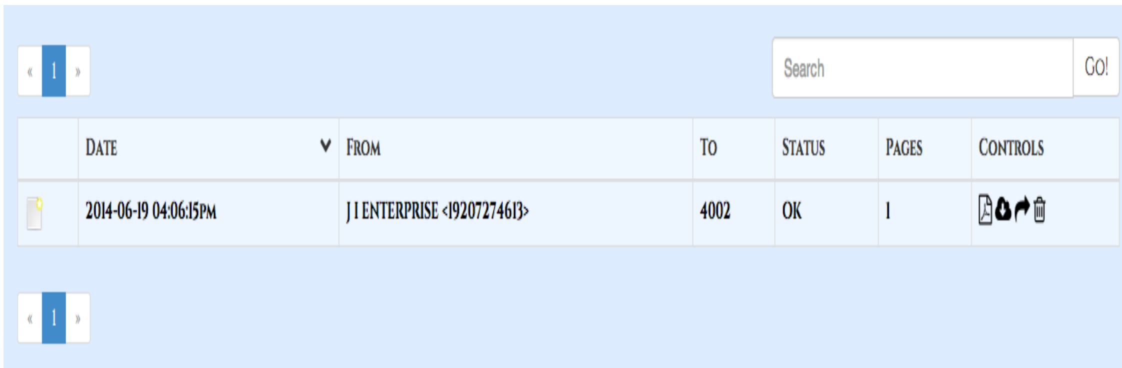


For each fax we can see the following;

- Date- Date Fax was received to sent.
- From- The Caller ID who sent the fax
- To- The number or extension the fax was sent to.
- Status- The status as reported by Asterisk of the fax.

- Pages- Number of pages Asterisk reports the fax is.
- Controls- Controls for this fax

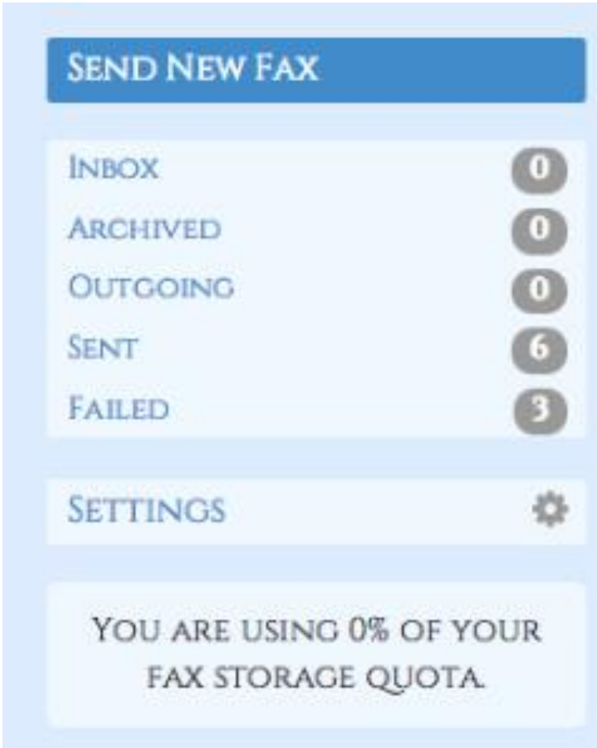
  - View the fax
  - Download the fax onto your computer
  - Forward the fax to another number
  - Delete the fax from the system.



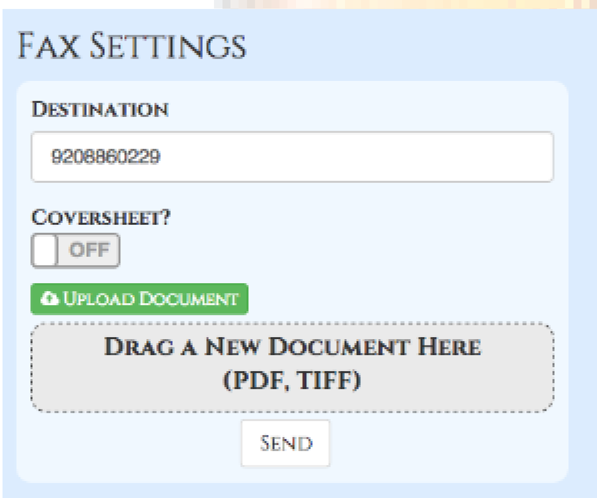
	Date	From	To	Status	Pages	Controls
	2014-06-19 04:06:15PM	J I ENTERPRISE <19207274613>	4002	OK	1	

Sending Faxes

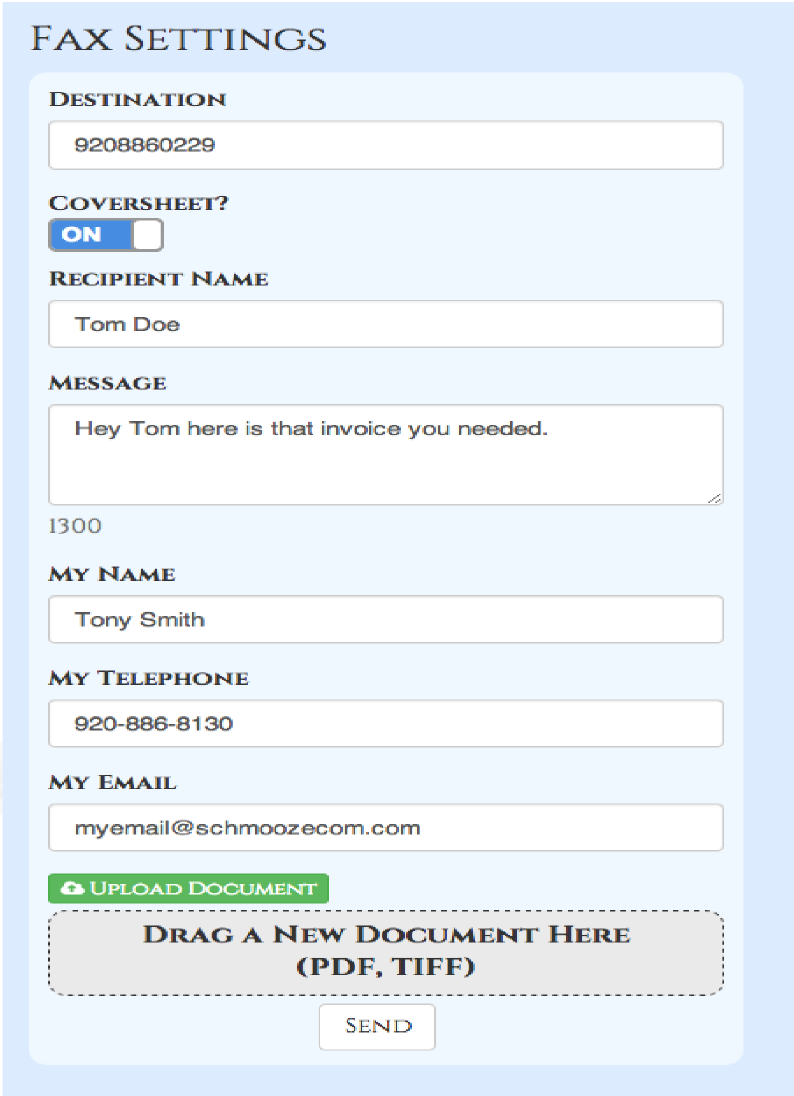
To send a fax choose the "Send New Fax" option at the top



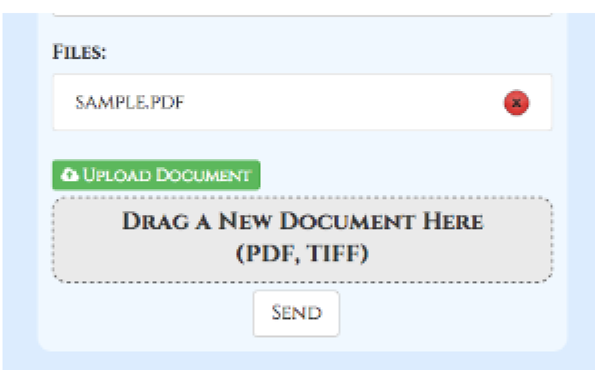
From here define the Fax Number we are sending the Fax to.



We can now optionally include the Fax Cover sheet. Please see the Fax Configuration module in your PBX Admin GUI on how to setup the Company wide Cover Sheet.



Either drag the documents you want to fax or use the "UPLOAD DOCUMENT" button. You can upload 1 or more documents and as they are uploaded they will be listed under the Files Section.

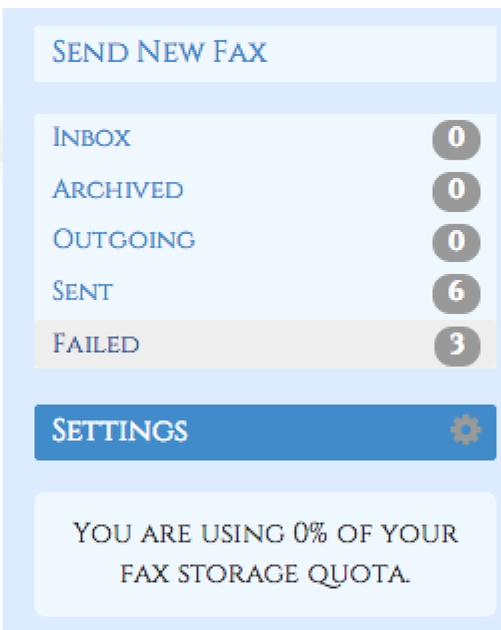


Press Send when done to send the fax. To view the status of any pending outbound fax click on the Outgoing mailbox.

When a Fax has successfully been sent it will be moved to the Sent Folder. If it fails to send after all the retries have been exhausted it will be moved to the Failed Folder.

Fax Settings

To manage the Fax settings related to your user press the Settings Option in Fax.



You can set the following options for your user.

- **Fax Email**- Email to send inbound Faxes to when this user receives a Fax
- **Attachment Format**- When a email is sent do you want the Fax Attached as a PDF or TIFF
- **Store Locally**- When a inbound fax is received should it store it locally to be viewed in UCP or delete it after emailing? Choose On to store locally.
- **Outgoing Station ID**- The Fax Number that should be displayed at the top of each outbound ax page.
- **Outgoing Header**- The name that should be displayed at the top of each outbound fax page.

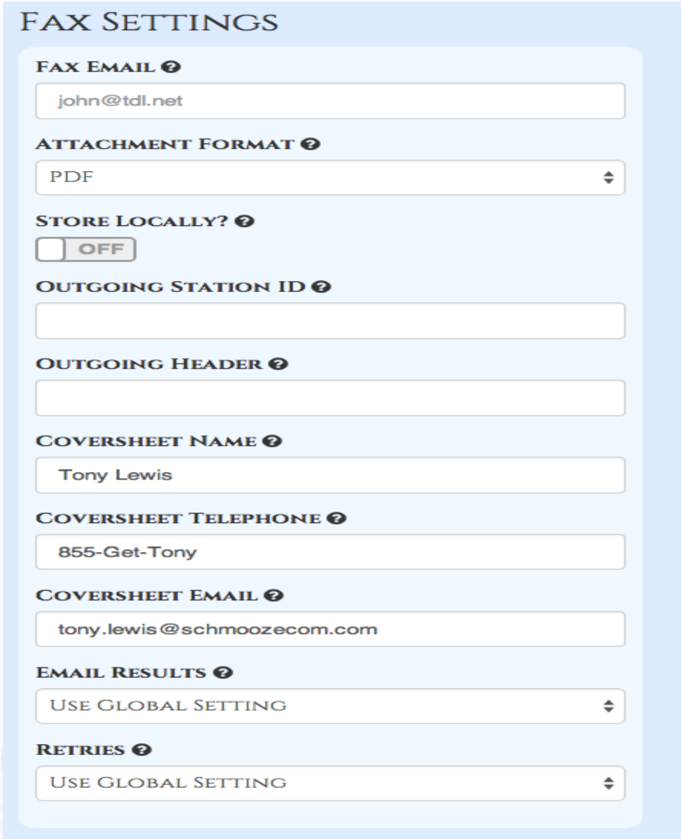
- **Coversheet Name-** Your personal name to be displayed on the Coversheet as to who the fax came from.
- **Coversheet Email**- Your personal email to be displayed on the coversheet as who the fax came from.

Email Results- On outbound fax do you want a email of the results.

- **Never-** Never send email on results of outbound fax
- **Always-** Always send email on results of outbound fax
- **On Success**-Only send email if fax is successful
- **On Failure**- Only send email if the fax fails on sending after all retires have been exhausted.
- **Use Global**- Use the settings that is defined globally in the Fax Module in the PBX Admin GUI.

Retries- If a outbound fax fails to get confirmation on being successful how many times do you want to retry to send the fax.

- **0-** Don't try and retry sending the fax.
- **1**- Try 1 time resending a failed fax.
- **2-** Try up to 2 times to resend a failed fax.
- **3**- Try up to 3 times to resend a failed fax.
- **Use Global**- Use the settings that is defined globally in the Fax Module in the PBX Admin G



Presence - UCP

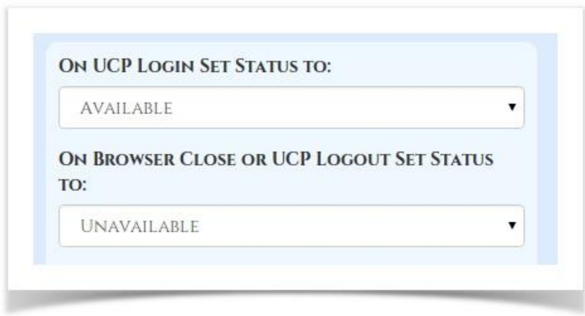
Changing your status

View the wiki here on how to change your presence on the fly anytime.

Usage

For any given setting you can automatically set a presence state or choose to do nothing.

Available states are set by the PBX administrator in the Presence State Module



On UCP Login Set Status To

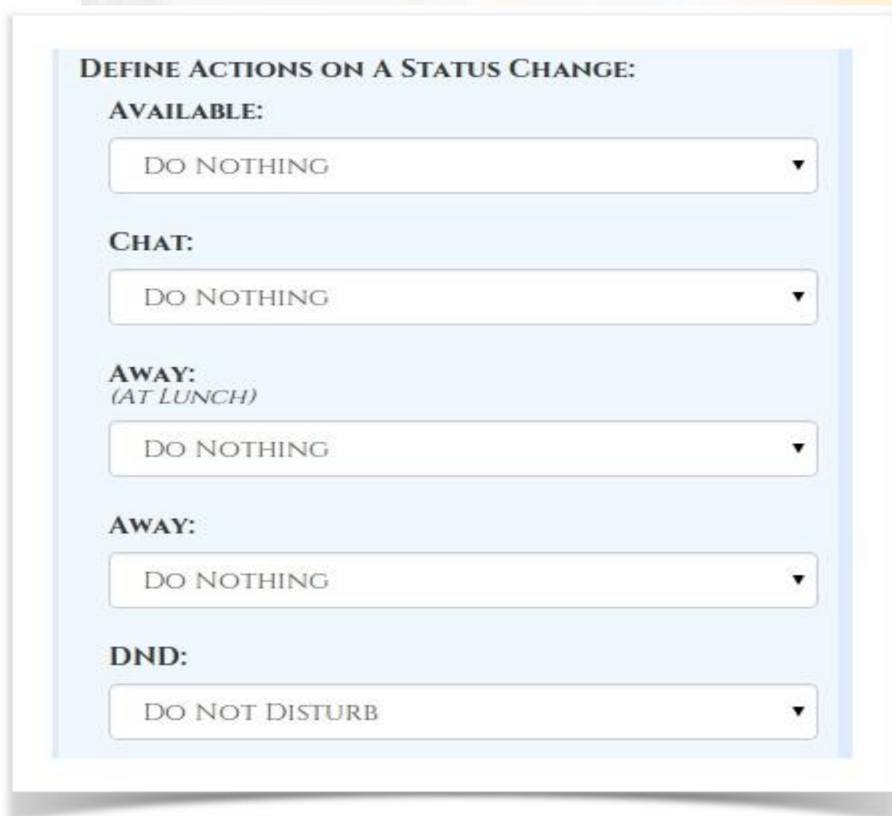
When you log in to the User Control Panel perform the selected action

On Browser Close or UCP Logout Set Status To

When you close your browser (or tab) for the User Control Panel or Log off perform the selected action

Automatic Actions based on status type

On a change to the selected status type you can have the system enable certain modes such as "Do Not Disturb" or "Find Me/Follow Me"



Available

When available do the following

Chat

When in Chat do the following

Away

When Away do the following

DND

When in DND do the following

Extended Away

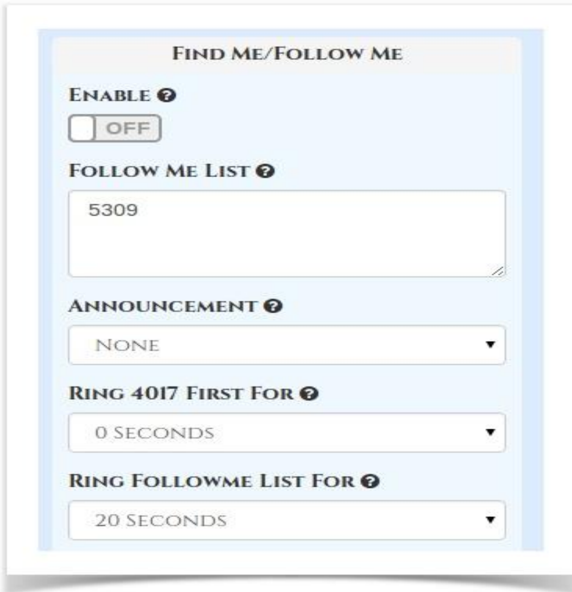
When Extended Away do the following

Unavailable

Follow Me Settings - UCP

Usage

Find Me/Follow Me



Enable

Should Find Me/Follow Me be enabled for this user

Follow Me List

List extensions to ring, one per line. You can include an extension on a remote system, or an external number by suffixing a number with a pound (#). ex: 2448089# would dial 2448089.

Announcement

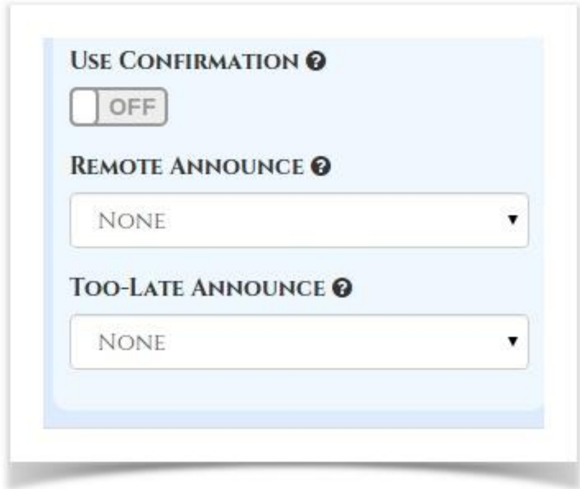
Message to be played to the caller before dialing this group.

Ring <Exten> First For

This is the number of seconds to ring the primary extension prior to proceeding to the follow-me list. The extension can also be included in the follow-me list. A 0 setting will bypass this.

Ring Followme List For

Time in seconds that the phones on the follow me list will ring. The number of rings will depend on region. Example: If a phone rings for 1 second then waits 2, each ring is 3 seconds.



Use Confirmation

Enable this if you're calling external numbers that need confirmation - eg, a mobile phone may go to voicemail which will pick up the call. Enabling this requires the remote side push 1 on their phone before the call is put through. Example "Press 1 to accept.

Remote Announce

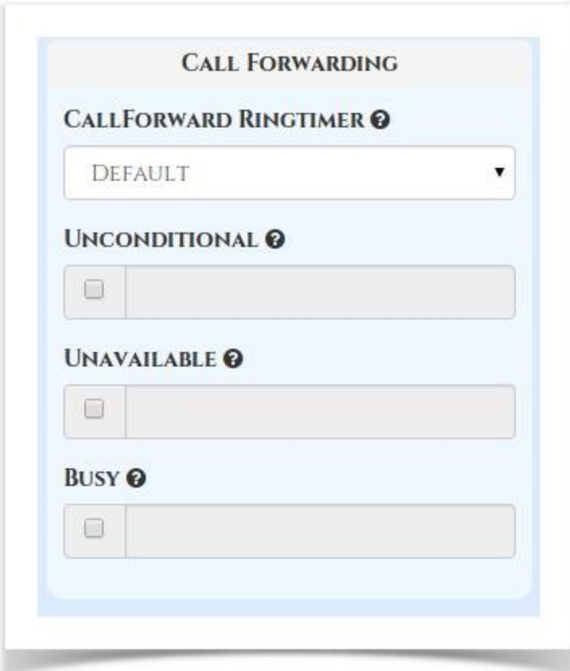
Message to be played to the person RECEIVING the call, if 'Confirm Calls' is enabled

Too-Late Announce

Message to be played to the person RECEIVING the call, if the call has already been accepted before they push 1.

Call Forwarding

Whether or not to forward calls in a given state. Check the box and enter the destination in the text field.



CallForward Ringtimer

Number of seconds to ring prior to going to voicemail or other fail over destinations that may be setup by an administrator on this account. The Always setting will ring the call forward destination until answered or the caller hangs up. The Default setting will use the value set in Ring Time. Your setting here will be forced to Always if there is no Voicemail or alternative fail over destination for a call to go to.

Unconditional

Forward calls immediately regardless of current state of line/PBX to the number entered.

Unavailable

Preconfigured number to which calls are forwarded if the customer endpoint becomes unresponsive due to an Internet outage or software/configuration failure of endpoint

Busy

Preconfigured number to which calls are forwarded if the customer endpoint is busy, usually due to being on an active call

Do Not Disturb

Used to indicate that this user does not wish to be disturbed.

Call Waiting

A weather this user making a telephone call should be notified of an incoming call and is able to place the first call on hold while answering the second.

Where is save button?

All settings are updated and applied in real time. No need to press save.

SMS - UCP

- This feature requires SIPStation Service
- This feature requires PBXact 12 and UCP
- This feature requires the SIPStation module
- This feature requires the SMS module

Enabling a User to send or receive SMS's

- Log in to the PBXact UI
- On the top menu click **Admin**
- In the drop down click **User Management**
- In the right navigation pane click on the user you wish to edit.

- In their settings you will see **SIPStation SMS DIDs**, Check the box next to the desired numbers
- Click **Submit** at the bottom

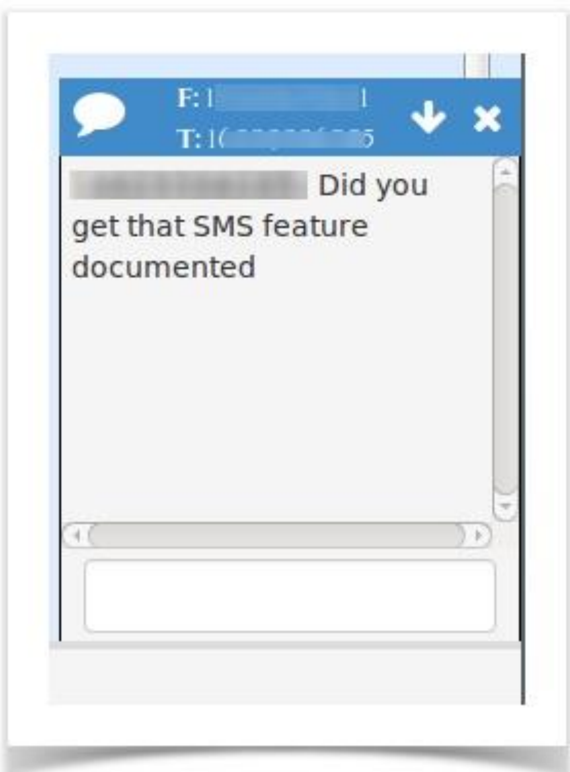
Sending an SMS

Login to the User Control Panel

On the top right click on the colored dot.

Click **New SMS**
A pop-up will appear

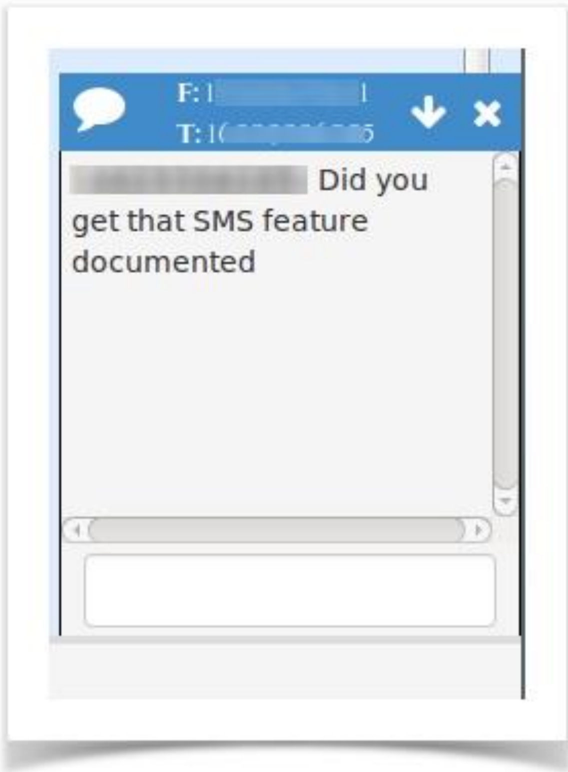
In the **From** drop down there will be a list of numbers available to this user
Choose the number you wish to send your SMS from.
In the **To** box put in the Destination number.
Press **INITIATE**
This will open a chat box. Note: this box will also appear if you receive a SMS while logged in.



You may now interact with the message as if it were any other chat.

Receiving SMS Messages

When a user sends a TXT message to a number that is assigned to you. You will get a chat style box when logged in

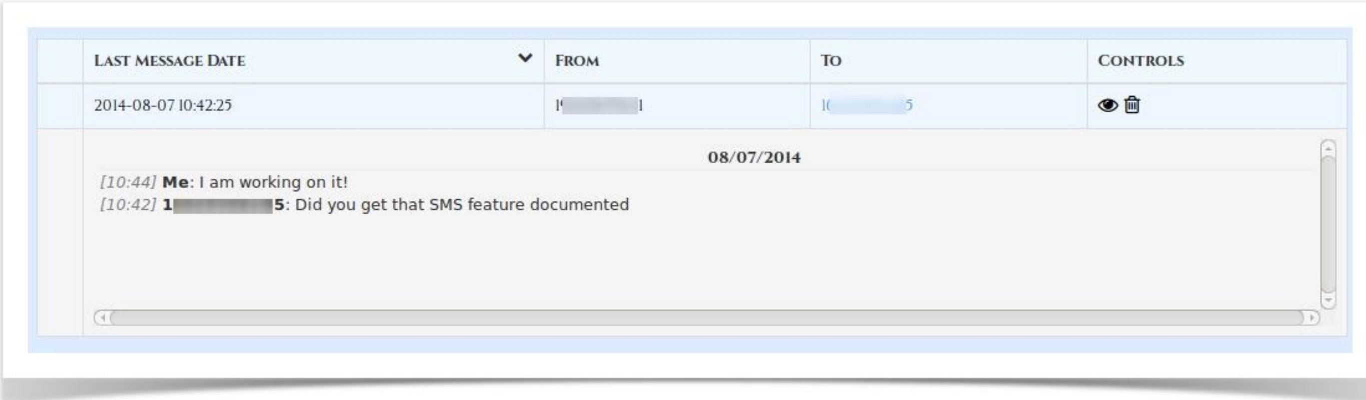


You can then respond as any other chat conversation and the user will receive your message as a text message.

If you are Not logged in your messages will be under the SMS tab

	Last Message Date	From	To	Controls
	2014-08-07 10:42:25	1[redacted]1	1[redacted]5	

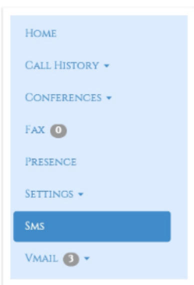
You can click the eye icon to view the message



You can click on the number under **To**, to open up the chat window and respond.
You can click the trash can to delete.

Viewing SMS History

Your SMS History is available in the SMS tab.



SMS Information

In the SMS tab you can do see the following for each message

Date

Date of when the last SMS was sent or received for this thread

From

What DID of yours the SMS thread was from

To

Who the message thread was to. Clicking on the To Number will bring up the SMS box to allow you to reply to the SMS.

Controls

- **View** (eye) the history of the message
- **Delete** (trash) the message

Voicemail - UCP

Managing Voicemail Messages

For each extension we can see all our voicemails.

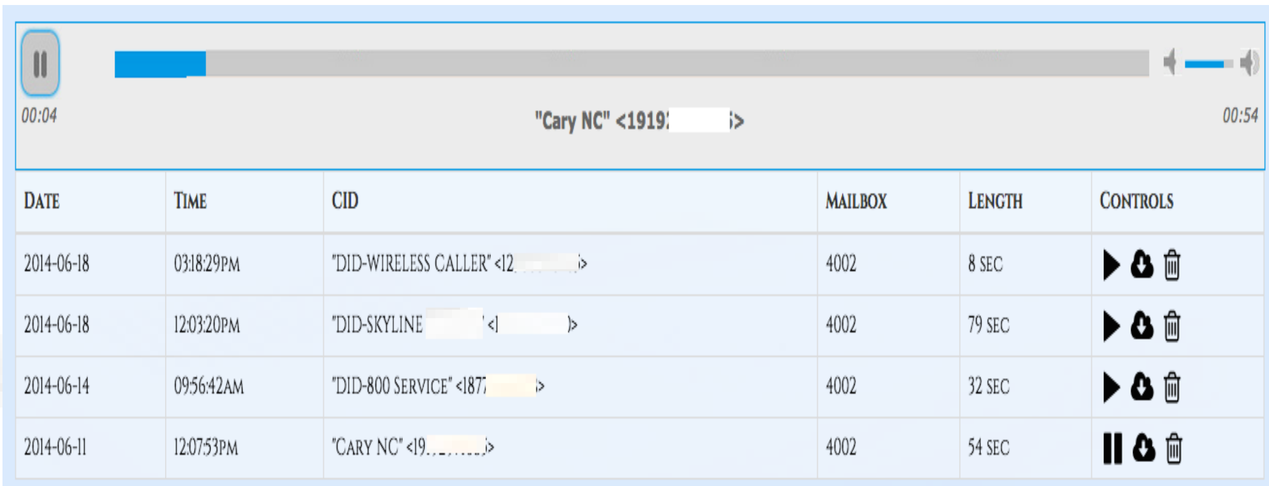
For each voicemail we can see the following;

- **Date**- Date voicemail was left
- **Time**- Time voicemail was left
- **CID**- Caller ID of who left the voicemail if supplied
- **Mailbox**- Extension number where voicemail was left
- **Length**- Length in Mins and Seconds of the message
- **Controls**- For each message we can choose any of the following Controls

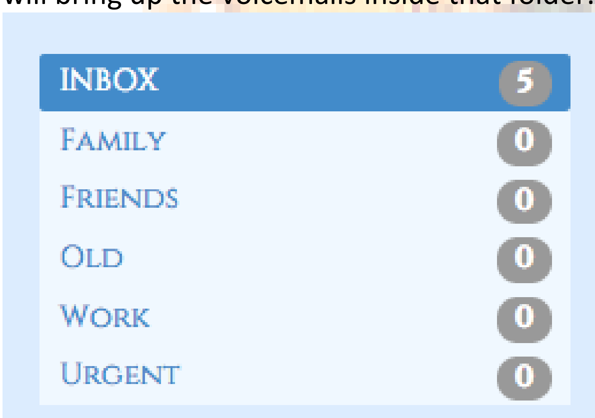
ICON	PURPOSE
	Play the voicemail message in your browser

ICON	PURPOSE
	Download the voicemail message onto your computer
	Delete the voicemail message from the system.

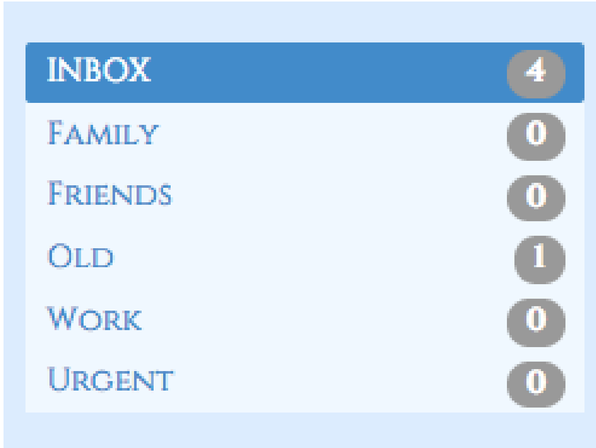
➢ While playing a voicemail you can use normal player controls to pause, fast-forward and rewind the message inside your browser.



➢ On the left side are a list of folders that voicemails can be moved to. Clicking on any folder will bring up the voicemails inside that folder.

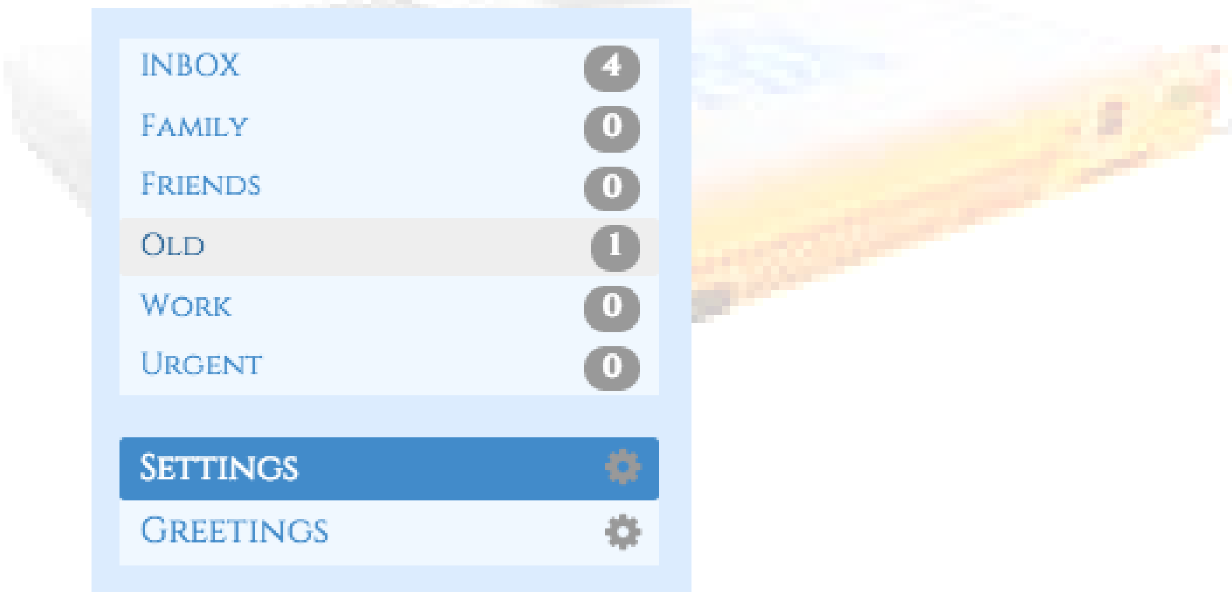


- At anytime you can drag a voicemail from any folder into any other folder and the message count next to each folder will auto update.

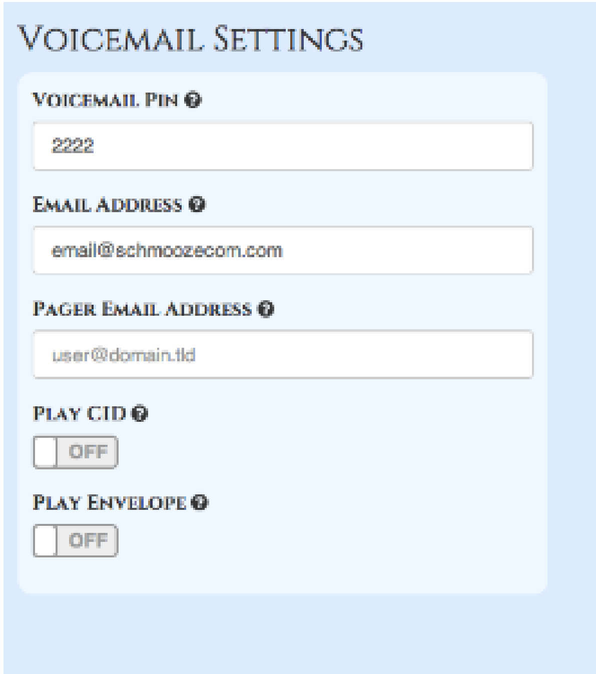


Managing Voicemail Settings.

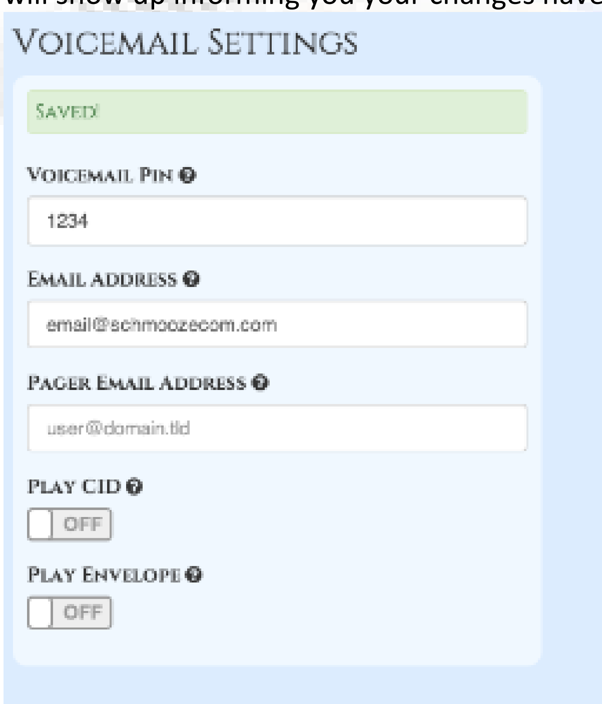
- On the left side of our voicemail section we have a option called Settings.



- Settings is where we can manage the following options for our voicemail box.
  - **Pin/Password**- The password for our voicemail box.
  - **Email Address-** Email address if defined where to send voicemails to.
  - **Play CID**- Play the Caller ID of who left the voicemail anytime you listen to the voicemail
  - **Play Envelope-** Play the date and time stamp of when the voicemail was left anytime you listen to the voicemail.

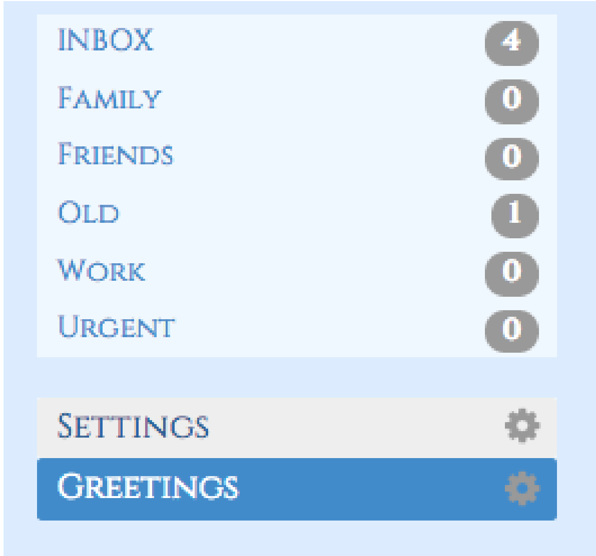


- Anytime you make a change there is no save button. All changes are instant and a greenbox will show up informing you your changes have been saved



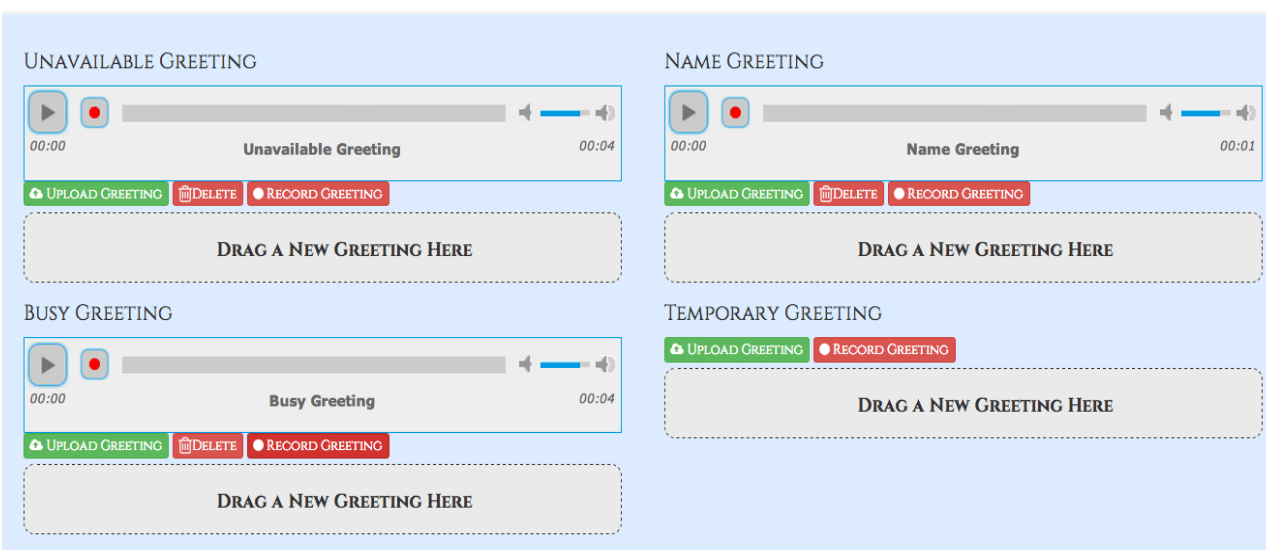
Managing Voicemail Greetings.

➤ On the left side of our voicemail section we have a option called for Greetings

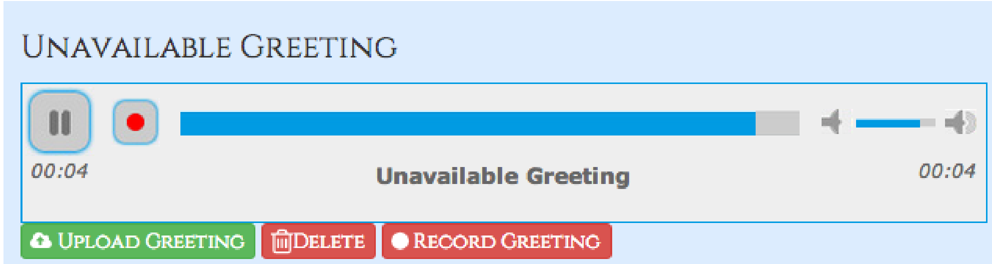


❖ Greetings are where we can control the announcement that is played to callers with our personal message. Your PBX has the following types of greetings.

- **Unavailable**- The greeting that is played to callers when you are not available to take their call and they go to your voicemail box.
- **Busy**- The greeting that is played to callers when you are not available to take their call and you are on another call already.
- **Name**- This is a recording of your name and used mainly for things like the Company Directory and other modules.
- **Temp**- A Temp greeting when recorded will be played instead of the Unavailable or Busy greeting. When you delete the greeting your other greetings will be played again.



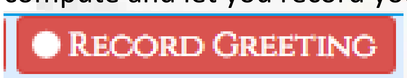
- For each greeting you can press the Play button to listen to the Greeting.



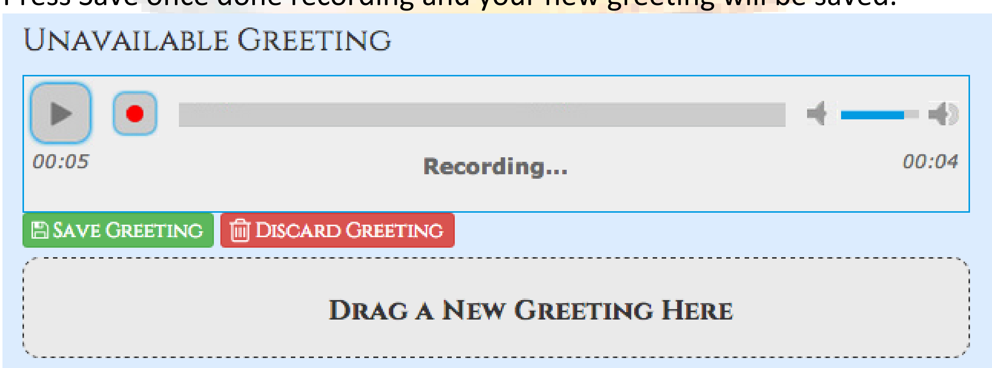
- You can press the Green "UPLOAD GREETING" button to upload a new audio file for your greeting or you can drag your audio file from your computer into the "Drag A NEW GREETING HERE" box to upload a new greeting.

- Pressing the red "DELTE" button will delete the voicemail greeting.

- Pressing the Red "RECORD GREETING" button will prompt you to enable your Mic on your compute and let you record your greeting.



Press Save once done recording and your new greeting will be saved.



- If you would like to copy your unavailable greeting to also be your busy greeting simply drag the Unavailable Greeting to the "Drag Box" of the Busy greeting as shown below.

iSymphony User's Guide

Connecting To The Client Interface

The iSymphony Client Interface allows end Users to interact with the core features of iSymphony (Call Management, Presence Management, Voicemail Management, Recording Management ect.). iSymphony 3.0 utilizes a web based Client Interface.

Browser Access

The Client Interface can be accessed by going to the following URL in your browser.

http://<10.0.8.1>:50001/client/client

The port **50001** is the default web port for the iSymphony server. This port may vary depending on configuration.

Login

When accessing the Client Interface you will be prompted to enter a username and password.

User Credentials

Dashboards and Layout - iSymphony 3.1 Documentation

The iSymphony Client Interface allows Users to create several Dashboards containing Layouts tailored to the User's needs. Each Dashboard can have its own custom Layout and contain Widgets of the User's choosing.

Each Dashboard can be configured separately from other dashboards and allow Users to have different views of the system available to them at any given time.

Adding New Dashboards

Users can create new Dashboards by selecting the **Plus Icon** at the top right hand corner of the Dashboard area in the client.

Removing Dashboards

Users can remove existing Dashboards by selecting the **Lock Icon** on the top right hand corner of the Dashboard area in the client. This will unlock the Dashboards and allow you to remove any Dashboard of your choosing by selecting the **X Button** on the Dashboard tab you wish to remove. You can re-lock the Dashboards by selecting the **Lock Icon** once more.

Renaming Dashboards

Users can rename the currently selected dashboard by selecting the **Pencil Icon** on the top right hand corner of the Dashboard area in the client.

Users can modify the Layout of a Dashboard to fit their needs by splitting existing Panels in the Layout horizontally and vertically or by removing Panels completely from the Layout.

Locking and Unlocking

Users can lock and unlock the Layout by selecting the **Lock Icon** on the top right hand corner of the Dashboard area in the client. When a Layout is unlocked the user has access to modify the Layout. If locked the Layout cannot be modified.

Panel Management

Panels in the Layout provide Users a place to insert Widgets. Each Panel in the Layout can hold exactly one Widget. If the Layout is unlocked or there is a Panel that does not currently contain a Widget the user will have access to the Panel actions via the three buttons on that appear on the top right hand corner of the Panel. These action will allow the user to create new Panels by splitting existing ones or remove Panels all together.

Panels that do not contain a Widget can be modified at any time despite the current Layout lock state.

Vertical Split

If the User selects the **Vertical Split Icon** the Panel will be split into two Panels along the vertical axis of the existing Panel.

Horizontal Split

If the User selects the **Horizontal Split Icon** the Panel will be split into two Panels along the horizontal axis of the existing Panel.

Removing Panels

If the User selects the **X Icon** the current Panel will be removed from the Layout including the Widget that was inside the Panel.

Widgets are used to present the core functionality of the Panel to the end Users via user interface. There are different Widgets available to the Users that provide different functionality. For a list of all available Widgets in the system see Widgets.

Adding A Widget To A Panel

Empty Panels in the Layout will have a **+ Icon** in the center of them. You can click anywhere in the empty Panel and the Widget Selection Dialog will open. From this dialog the User can search for and select which Widget to add to the current Panel.

Removing A Widget From A Panel

Users can remove existing Widgets from a Panel by selecting the **X Button** on the top right hand corner of the Widget header. Removing a Widget from a Panel will open up the Panel in order to place a different Widget inside.

Moving Widgets to Other Panels

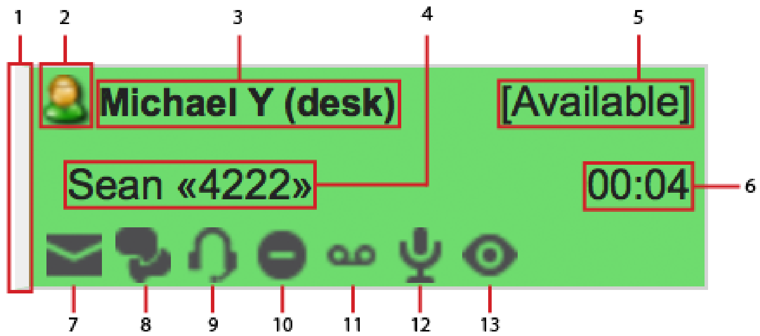
Users can drag and drop a Widget header to another empty Panel in order to move the Widget from one Panel to another.

If the destination Panel already contains a Widget the destination Panel will automatically perform a vertical split to make room for the dragged Widget.

Users Widget

The Users widget allows you to view the state of other Users in the system along with Extension State, Call State and Presence. You can also filter and sort the list of Users to your liking.

1. **User login status**
2. **Presence status icon**
3. **User name**
4. **Caller ID of call**
5. **Presence status text**
6. **Call time**



7. **E-mail icon**
8. **Chat**
9. **Agent button**
10. **Do Not Disturb toggle**
11. **Voicemail**
12. **Record**
13. **Barge**

User Boxes

The Users Widget will have a User box for each user in the system (excluding your own). This box provides a display of the User's Accounts, Calls and Presence state while providing functionality to interact with and manage the User's Accounts, Calls and Presence.

User Login Status

The bar on the left hand side of the User box will display the current iSymphony login status of the User. By default logged out Users will be grey and logged in Users will be green.

Call and Extension Status

The user boxes will change color to show the users current call or extension registration status. For a list of default status colors and what they represent see Call Status.

User Registration Status

A general registration status will show on the User Box for all of the user's extensions.

- The User Box itself will show the registered status color if the user has at least one extension assigned to them that is registered.
- The unregistered status will show on the User Box only if all the user's extensions are unregistered.

Overall registration state for the user will not be shown if the user is on an active call.

Extension Registration Status

You can view individual extension registration status for each of a user's assigned extensions by selecting the user's name in the User Box in order to open the Account Selection List.

User Actions

There are several buttons that will appear on a User box that will allow other Users in the system to perform actions on that User.

- Email: If the User has a configured email address you can select the email button to initiate a mailto for that address. This will utilize the default email client on your OS.
- Chat: This button allows a User to start a Chat session with this User. See Chat for more information.

Sorting and Filtering

The Users Widget allows for sorting and filtering of the listed Users. The Sort and Filter bar can be opened and closed via the **Magnifying Glass Icon** on the top right in the Users Widget header.

Sorting

You can sort the user list by several different user properties. The **Arrow** to the left of the sort dropdown can be used to change the sort direction from Descending to Ascending.

- None: No sorting.
- Availability Status: Sorts by the current Status set on the User. See Presence for more information.
- Call Status: Sorts by the User's Account call status.
- Caller ID (Name): Sorts by the User's Account call Caller ID name.
- Caller ID (Number): Sorts by the User's Account call Caller ID number.
- Login: Sorts by the User's iSymphony login status.
- Name: Sorts by the User's display name.
- Talk Time: Sorts by the Users Account Call time.

Filtering

You can utilize the **Search** field in the Sort and Filter bar to search for specific Users and Accounts. The text entered in the **Search** field will match on the following.

- User Display name.
- Account Display name.
- Account number.

You can also select an Extension Group from the dropdown on the right corner of the Sort and Filter bar. This will only show Users and Accounts for Extensions that are in the selected Extension Group. See Extension Groups for more information.

It is possible to filter out specific extensions on a User to the point where the Account List on a User box does not list all Accounts for that User. For example, if a User has Extension 100 and Extension 200 as Accounts and you enter "100" in the **Search** field the User box will show in the User list but he Account list in the User box will only show Extension 100 and not 200.

Accounts

Just like in the My Stream Widget the User boxes in the Users Widget will display information about all the specified User's Accounts.

Selecting the Active Account

The selected Account on a User box determines what Account the action buttons of the User box and drag and drop actions will effect. For example, if I select the User's Extension 100 Account and a call is dropped on the User box the call will be transferred to Extension 100. You can select the active Account by clicking on the header, where the User name is displayed, which will open a drop down menu of all available Accounts for you to select from.

Unlike the My Stream Widget the selected Account will not affect what calls are displayed for that User. All calls for all Accounts on that User will be displayed at all times.

The "User" Account

All Users will have one Account labeled **User** in the Account list. This Account is the default selection for all User boxes and will allow you to perform actions on whatever Account is currently selected as the User's Default Account. See the **Default Account Selection** section on the My Stream Widget page for more information.

Drag from Accounts

Users can drag Extension Accounts from the User box to the following destinations in order to originate calls from the dragged Account to the dropped destination. The Account that is currently selected in the User box will determine which Account is dragged to perform the origination.

The location where you drag from in the User box will determine what object is dragged.

- Drag from the User box header: Will drag the Account for origination. The drag image will be that of the entire User box.
- Drag from non-header areas in the User box: Will drag the call that the User is on for transferring. The drag image will be the caller id of the call only.
- Users
- User Extensions
- User Alternative Phone Numbers
- User Voicemail Box
- Conference Rooms

Drag To Accounts

Users can drop Accounts from the other User boxes or the My Stream Widget on Accounts in the User box in order to perform an origination from the Account that was dropped to the Account that was dropped on. The Account that is currently selected in the User box will determine which Account is the destination Account for the origination.

Users can drop calls from the following locations on Accounts in the User box in order to transfer that call to the Account that was dropped on. The Account that is currently selected in the User box will determine which Account is the destination Account for the transfer.

- Users
- Queues
- Parking Lots
- Conference Rooms

During a drag to a User box you can hover over the header in the User box to open the Account list. From here you can drop on a specific Account in the list in order to perform an origination or transfer to that Account without having to select it beforehand.

Account Actions

Several buttons will appear on the User box that will allow you to perform actions on the currently selected Account.

- Agent: Allows you to manage this Account's agent login along with pause state and penalty.
- DND: Allows you to toggle this Account's DND status.
- Voicemail: Allows you to originate and transfer calls directly to this Account's voicemail box.

    - If clicked a call will be originated to the Account's voicemail box using your selected Default Account.
    - If an Account is dropped on the button a call will be originated from the dropped Account to the Account's voicemail box.
    - If a call is dropped on the button the call will be transferred directly to the Account's voicemail box.
    - Actions using the voicemail button will not ring the extension.

Calls

The User box will display all active calls for the User's Accounts and allow you to manage those calls.

Selecting the Active Call

The User box will only show one call at a time and allow you to manage that call. There may be a case where a user is on multiple calls across one or more Accounts. If the User has more than one active call **up** and **down** arrows will appear to the right of the caller ID section in the User box which will allow you to select the current active call. The currently selected call will specify which call the User box call actions and drags will be performed on.

Dragging Calls

Users can drag calls from the User boxes to the following locations in order to transfer that call to the destination.

- Users (can utilize the Default Account, See **The "User" Account** section above and My Stream Widget for more information)
- User Extensions
- User Alternative Phone Numbers
- User Voicemail Boxes (will not ring destination extension)
- Conference Rooms
- Parking Lots
- Queues

Call Actions

Several buttons will appear on the User box that will allow you to perform actions on the currently selected Call. If there are no calls for the User no call action buttons will be visible on the User box.

- Record: Toggle on demand recording of this call on and off.
- Barge: Allows users to barge in on this call. See My Stream Widget for more information on barge types.

Presence

Users can view and manage other Users presence from a User box. See Presence for more information.

Settings

Settings for the Users Widget can be access by clicking the cog icon in the top right hand corner of the Users Widget.

User Box Width: Allows you to specify the width of the user boxes in pixels.

Voicemail Widget

The Voicemail Widget allows you to view and manage voicemail for your Accounts.

Filtering

You can filter the vociemail list by voicemail box or folder by selecting a voicemail box or folder from the list on the left. Selecting **All Voicemails** will allow you to see all voicemail in all voicemail boxes and folders.

Properties

Name

The caller ID name and number of the call that left the voicemail.

Time

The Date and Time the voicemail was left along with the length of the voicemail.

Actions

Play Back

Users can play back voicemail in one of two ways.

In Browser

If you select a voicemail a play back bar will appear under the voicemail list. You can use this bar to pause, play and seek throug the voicemail.

On The Phone

If you select the **Play Button** on a voicemail your Default Account (See My Stream for more information) will be called and the voicemal will be played back to you over the phone.

Delete

You can permanently delete a voicemail by selecting the **Delete Button** on the Voicemail. You can delete multiple voicemails at once by using **Ctrl-Click** or **Shift-Click** and hitting the **Delete Key**.

Call Back

The **Call Back Button** will allow you to originate a call to the caller id number of the call that left the voicemail via your Default Account (See My Stream for more information).

Move

The **Move Button** allows you to move voicemail between one of the predefined voicemail folders.

Forward

The **Forward Button** allows you to forward the voicemail to one or more users in the system.

Recordings Widget

The Recordings Widget allows you to view and manage recordings for your Accounts.

Properties

Tag

The tag of the voicemail. See Recording Agents for more information.

Caller ID

The caller ID name and number of the recorded call.

Source

The source extension number of the recording.

Destination

The destination extension of the recording.

Duration

The duration of the call the recording was made from.
The duration is not the length of the recording.
Date/Time

The Date and Time of the call the recording was made from.

Actions

Play Back

Users can play back Recordings in one of two ways.
In Browser
If you select a recording a play back bar will appear under the recording list. You can use this bar to pause, play and seek through the recording.
On The Phone
If you select the Play Button on a recording your Default Account (See My Stream for more information) will be called and the recording will be played back to you over the phone.
Delete

You can permanently delete a recording by selecting the **Delete Button** on the Recording. You can delete multiple recordings at once by using **Ctrl-Click** or **Shift-Click** and hitting the **Delete Key**.

Conference Room Widget

The Conference Room Widget allows you to view and manage users in a Conference Room.
Properties

Caller ID

The caller ID name and number of the Conference Room user.
Duration

The amount of time that the user has been in the Conference Room.
Actions

Mute/Unmute

You can use the **Mute/Unmute Button** to Mute or Unmute the Conference Room User.

Kick

You can use the **Kick Button** to remove the user from the Conference Room.

Drag An Drop

Users can drag Users, Accounts, and calls to the Conference Room Widget to add them to the Conference Room. Users can also drag calls away from the Conference Room in order to transfer them to other locations in the system.

Parking Lot Widget

The Parking Lot Widget allows you to view and manage calls that are currently on hold in a give Parking Lot.

Properties

Lot #

This is the lot number of the parked call. Any extension in the system can dial this number to pick up the call.

Caller ID

The caller ID name and number of the parked call.

Parked By

The caller ID name and number of the person who placed the call in the parking lot.

Duration

The amount of time that the call has been in the parking lot.

Actions

You can double click on any parked call to transfer that call to your Default Account (See My Stream Widget).

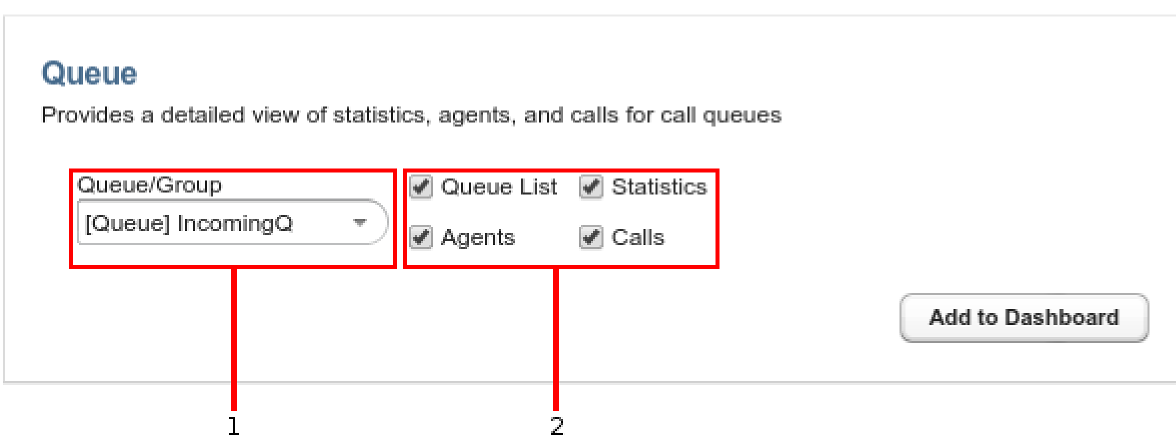
Drag An Drop

Users can drag calls to the Parking Lot Widget to place them in the Parking Lot. Users can also drag calls away from the Parking Lot in order to transfer them to other locations in the system.

Queue Widget

The Queue Widget displays detailed information about all queues in the system. The information includes calls currently waiting in the queue, agents logged into the queue, and statistical information about the queue and agent performance.

Initial Options



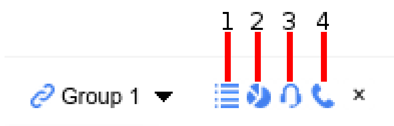
When adding the Queue Widget to a dashboard you can specify options, in the widget chooser, before it is added.

1. Specifies the selected queue or queue group (See Queue Widget Groups Below) the widget will have selected when added to the dashboard.
2. Specifies the sections that will be visible when the widget is added to the dashboard.

Sections

The queue widget is divided into several sections each providing specific information about the queue(s).

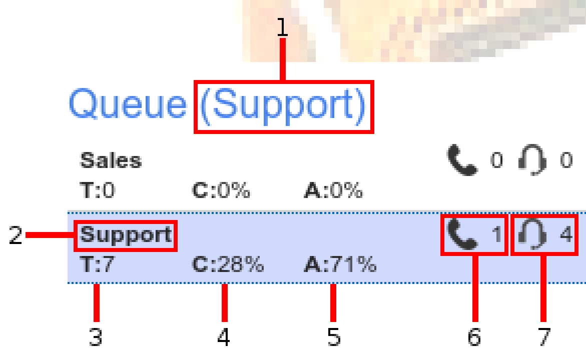
Enabling/Disabling Sections



Users can choose which sections are visible via the toggle buttons on the top right hand corner of the queue widget:

1. **Queue List:** Shows or hides the Queue List section.
2. **Statistics Section:** Shows or hides the Statistics section.
3. **Agents Section:** Shows or hides the Agents section.
4. **Calls Section:** Shows or hides the Calls section.

Queue List Section

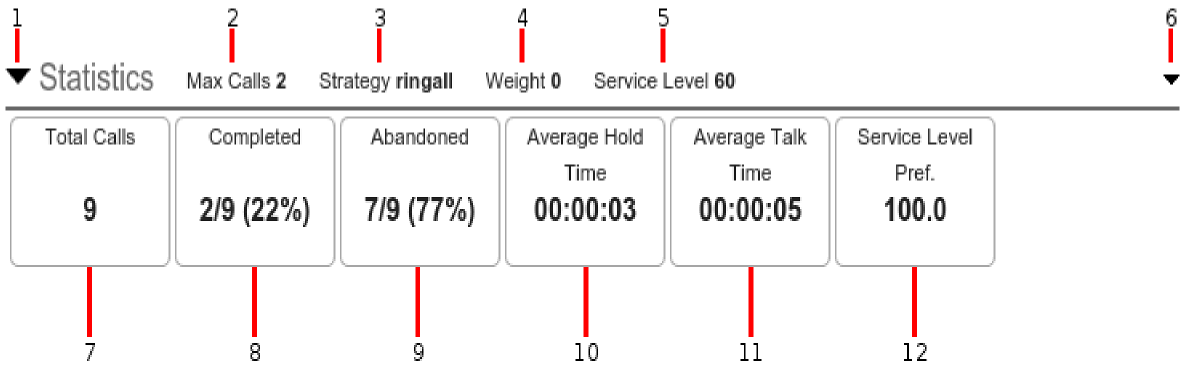


This section displays a list of all queues in the system that are available to the user along with a statistical overview of the queues. Users can use this list to select a queue to view detail on.

1. The display name of the currently selected queue.
2. The display name of the queue.
3. The total number of calls that the queue has processed.
4. The number of "completed calls" the queue has processed. Completed calls are calls that were answered by an agent.

5. The number of "abandoned calls" the queue has processed. Abandoned calls are calls that left the queue before they were answered by an agent.
6. The number of calls currently waiting in the queue.
7. The number of agents currently logged into the queue.

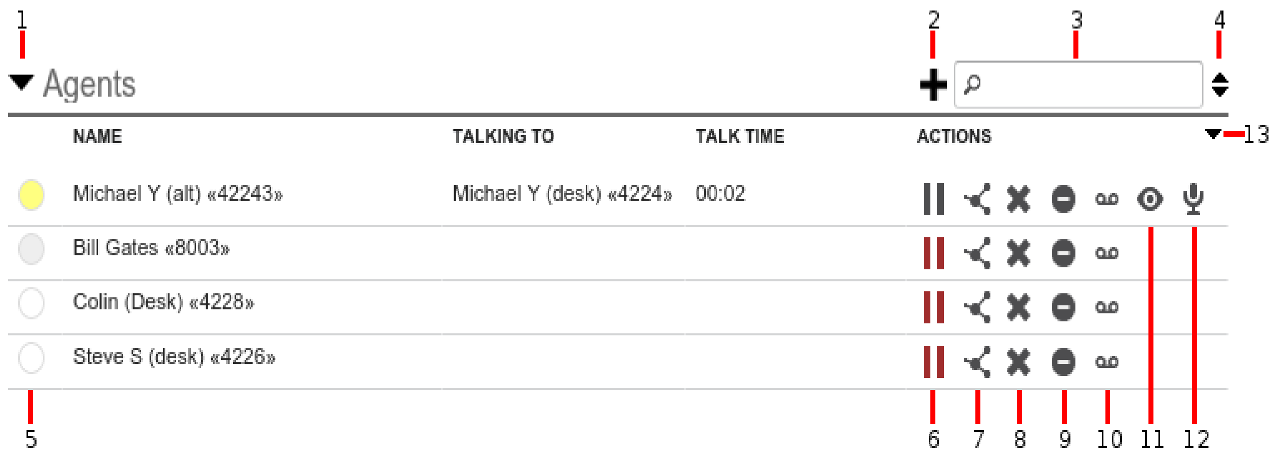
Statistics Section



This section displays a detailed view of the selected queue's properties and statistics.

1. Collapses or expands this section.
2. Property that specifies the maximum number of calls that are allowed in the queue.
3. Property that specifies the ring strategy set on the queue.
4. Property that specifies the weight of the queue. Ensure calls waiting in a higher priority queue will deliver its calls first if there are agents common to both queues.
5. Property that specifies the service level of the queue, in seconds. Used for service level statistics (calls answered within service level time frame).
6. Moves this section up or down in the section display order.
7. Statistic that specifies the total number of calls that the queue has processed.
8. Statistic that specifies the number of "completed calls" the queue has processed. Completed calls are calls that were answered by an agent.
9. Statistic that specifies the number of "abandoned calls" the queue has processed. Abandoned calls are calls that left the queue before they were answered by an agent.
10. Statistic that specifies the average time calls have been waiting in the queue before they are answered by an agent.
11. Statistic that specifies the average time agents spend speaking to callers that were processed by the queue.
12. Statistic that specifies the percentage of calls that have been answered within the time specified by the service level of the queue.

Agents Section



This section displays all agents that are currently logged into the selected queue. Displays information about the agent's current call status and the call they are currently on, including the caller id of the call and how long the agent has been on the line with the caller. Also provides actions to control the agent and it's relative extension.

1. Collapses or expands this section.
2. Allows users to search for and login a specified extension into the queue.
3. Filters the agent list based on the agent name.
4. Moves this section up or down in the section display order.
5. Icon that displays the current call state of the agent.
6. Pause/Unpause the agent.
7. Sets the agent penalty. Allows specification of ring priority for an agent in a queue.
8. Logs the agent out of the queue.
9. Toggles the agent's DND state on and off.
10. Represents the agents voicemail box. Users can click this icon to origination a call from their extension directly to the agent's voicemail box. Users can also drag and drop calls on this icon to transfer the call directly to the agent's voicemail box.
11. Allows a user to barge in on the call the agent is currently on. Only visible when the agent is on a call.
12. Allows a user to record the call the agent is currently on. Only visible when the agent is on a call.
13. Controls the visible columns in the agent table (Only visible when hovering over the table header).

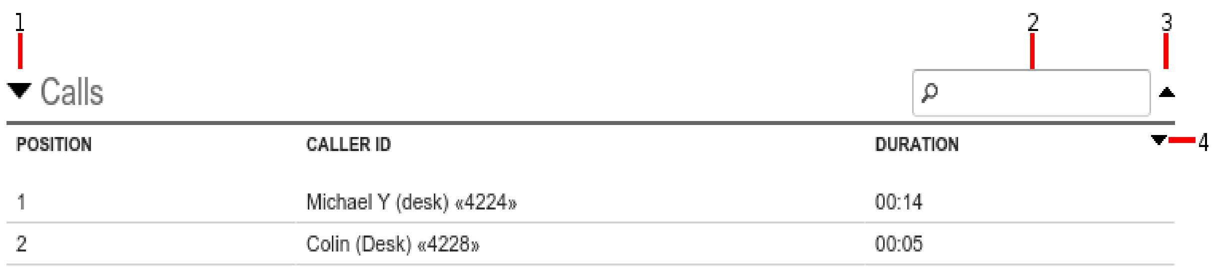
Table Columns

The agent section table has several columns available. Some columns are hidden by default.

- **Name:** The display name of the agent's extension.
- **Talking To:** The caller ID of the call the agent is currently on the phone with.
- **Talk Time:** The time the agent has been on the line with the caller.
- **Agent Name:** The agent's name as reported by Asterisk.
- **Agent Status:** The agent's status as reported by Asterisk.
- **Calls Taken:** The number of calls the agent has answered from the queue.

- **Last Call Time:** The date and time the agent was last on a call.
- **Penalty:** The agent's currently set penalty.
- **Actions:** Actions for the agent and its extension.

Calls Section



This section displays calls that are waiting, in the selected queue, to be answered by an agent.

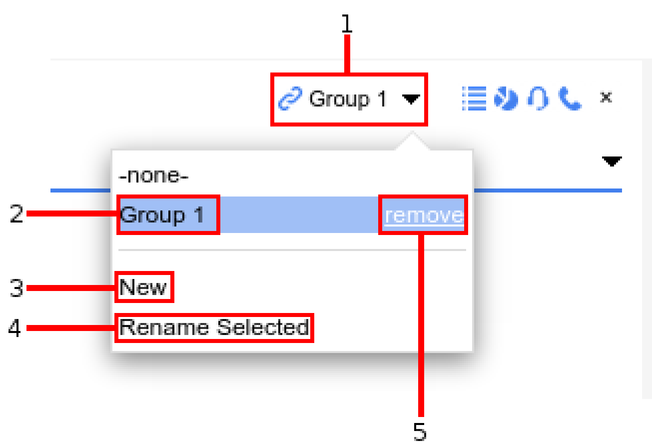
1. Collapses or expands this section.
2. Filters the call list based on the caller id of the caller.
3. Moves this section up or down in the section display order.

Table Columns

The agent section table has several columns available. All columns are visible by default.

- **Position:** The calls position in the queue.
- **Caller ID:** The caller ID of the call.
- **Duration:** The time the call has been waiting in the queue.

Queue Widget Groups



Queue widget groups allow users to link several queue widgets together so they can synchronize their currently selected queue. This means that if two queue widgets are assigned to the same group and the user selects a queue in one widget the other widget's selected queue will also change. This feature can be used to create your own layout of the queue sections by breaking them into separate queue widgets while only having to select the desired queue in one of the widgets. There is no limit to how many widgets can be linked to a group.

Users can manage the queue widget groups along with which group the widget is linked to via the group dropdown menu in the top right hand corner of the widget.

1. Opens the menu that allows management of the queue widget groups as well as selection of the assigned group for the widget.
2. The name of the group.
3. Creates a new group.
4. Renames the currently selected group.
5. Removes the group.

Drag And Drop

Specific sections in the queue widget are drag and drop enabled.

Drag

- Users can drag calls from the agents section to steal calls away from agents.
- Users can drag calls from the calls section to transfer the call away from the queue to another location.

  Dragging a call away from the queue will mark that call as **Abandoned** even if you drop it on an agent in the queue.

Drop

- Users can drop calls on the queue list or the calls section to transfer the call to the queue.
- Users can drop calls on agents in the agent section to transfer the call to the agent's extension.
- Users can drop calls on the agent's voicemail box icon to transfer the call to the agent's extension voicemail box.

CRM Widget

The CRM widget allows users to open specified URLs on incoming call activity. This widget is useful if you wish to open web based CRM or other records based on incoming call information. Although this widget is called the CRM widget it can be used to open any type of web page.

By default the CRM widget will want to open the URL in an embedded iframe inside the widget. Some web pages specify X-Frame-Options which prevent themselves from being embeddable in an iframe. This issue is identified by a blank page showing in the CRM widget when it should be populated by the web page. If you cannot modify the destination webpage's X-Frame-Options to allow embedding from the iSymphony application you will have to use the **Open URL in new window** option.

Open URL on Demand

If you do not wish to open a URL on call events but wish to open them on demand you can use the CRM button in the My Stream Widget. See My Stream Widget for more information.

Settings

Settings for the CRM Widget can be access by clicking the cog icon in the top right hand corner of the CRM Widget. The settings dialog will also open automatically when adding the CRM Widget to the dashboard for the first time.

Name:	The name of this CRM widget. This name is use to identify which CRM window to open when using the Open CRM button in My Stream.
Open On:	Specifies when to open the specified URL. ➢ **Never:** Disable this CRM widget. ➢ **Ring**: Open when you have an incoming ringing call. ➢ **Answer**: Open when you answer an incoming call.
Open URL in new window:	When checked the specified URL will open in a new browser popup window instead of inside the widget. This can be used for web pages that do now allow themselves to be embedded in iframes.
Open on calls from internal extensions:	When checked the specified URL will open on calls from internal extensions.
URL:	The URL to open. The following variables can be used in the URL which will be replaced with information from the call. ➢ **${CALLER_ID_NAME}:** The caller ID name of the incoming call. ➢ **${CALLER_ID_NUMBER}:** The caller ID number of the incoming call. ➢ **${DID}:** The phone number this call initially dialed to enter the phone system. ➢ **${USER}:** The username of the current user. ➢ **${PBX(*key*)}:**The phone system variable with the given key that is attached to the incoming call. If the variable does not exist on the incoming call the value will be set to a blank string.

Call Status

Here are several places in the application that show call status. These include the My Stream Widget, Users Widget, and Queue Agents Widget.

Call Status Colors

Call status is represented in the application by changing the color of specific objects like Calls, Accounts, Users and Agents. The system has several default colors for each call status. These colors can be customized by the Administrator (See Users for more information).

White

A white color signifies that an extension is currently registered but idle.

Light Grey

A light grey color signifies that an extension is currently unregistered.

Dark Grey

A dark grey color signifies that a call is currently on hold.

Yellow

A yellow color signifies a ringing call. This is used for both incoming and outgoing rings.

By default both incoming and outgoing ringing state is represented by the same color however the colors for these states can be defined independently.

Light Green

A light green color signifies a linked call with an outside line.

Dark Green

A dark green color signifies a linked call with a local phone system destination (e.g. Extensions to Extension, Extension to Conference Room, Extension to Voicemail box).

Orange

An orange color signifies a call that came from a queue.

Call Control

Managing calls is one of the main aspects of the iSymphony system. All iSymhony call management is handled in the iSymphony Client Interface via Click and Drag and Drop actions in the Client UI.

Originating Calls

There are several methods to origination calls in the iSymphony Client Interface.

Double Click Users

If you double click a User box in the Users Widget the system will originate a call from your Default Account (See My Stream Widget for more information) to the Account of the User that was double clicked.

The account that is currently selected on the User box will determine the destination for the origination. See Users Widget for more information.

Call Action

The **Call Button** at the top of the iSymphony Client Interface will allow Users to originate calls to specific destinations in the system or to arbitrary external numbers. See Actions for more information.

Drag and Drop

Users can drag and drop extension Accounts to other extension or alternative phone number Accounts in order to originate a call between the two. See My Stream Widget, Users Widget and Queue Agents Widget for more information.

Transferring Calls

There are several methods used to transfer calls in the iSymphony Client Interface.

Transfer Action

The Transfer Button at the top of the iSymphony Client Interface will allow Users to transfer one of their calls to another location in the system or arbitrary external number. See Actions for more information.

Drag and Drop

Calls can be transferred to different locations in the system by simply dragging the call to the desired destination within the iSymphony Client Interface. The following Widgets allow for transferring of calls between them. See the specific Widget documentation for more details on drag and drop behavior.

- My Stream Widget
- Users Widget
- Parking Lot Widget
- Conference Room Widget
- Queue Widget

Placing Calls On Hold

Users can use the **Hold Button** in the My Stream Widget and User boxes in the Users Widget in order to toggle a calls hold state.

Parking Calls

Users can park calls using the **Park Button** in the My Stream Widget or by dragging and dropping the call into the Parking Lot Widget.

Barging Calls

In iSymphony, a user can barge a call to listen in, coach an agent, or join the conversation.

Initiating a Barge

When a user is on a call, a barge button will be added to their user box, in the Users Widget. When you select the barge button your phone will ring. When you pick up you will be barged in on the agent's call. You will automatically be muted, and the other parties will not be able to hear you.

Switching Barge Modes

Once you are on a barge call, you will see a barged call item in your My Stream. This call item will have a new button that will allow you to switch between the following barge modes:

- Mute : The other parties on the call will not be able to hear you.
- Agent Only : Only the agent, you started the barge on, will be able to hear you.
- Unmuted : All parties on the call will be able to hear you.

Actions

There are several buttons at the top of the iSymphony Client Interface that allow the user to perform several actions in the panel. These actions also have hot keys associated with them for easy access.

My Stream (Hot Key: M)

Provides quick temporary access to the My Stream widget without adding it to the Dashboard Layout.

Sometimes accounts that require attention will cause the My Stream action button to show a notification number. This number represents the number of accounts that require attention. For Example if you do not have the My Stream Widget open in your Dashboard and you receive an incoming chat message the My Stream action button notification count will appear and show "1" to indicate that your chat account requires attention.

Call (Hot Key: C)

Used to create a call from one of your **Source Extensions** to a specified **Destination**.

If the search field does not match on any known destinations and the call is initiated the system will assume that your are attempting to dial an arbitrary outside number.

Transfer (Hot Key: T)

Used to transfer the selected **Call** to a specified **Destination.**

If the search field does not match on any known destinations and the transfer is initiated the system will assume that your are attempting to transfer to an arbitrary outside number.

If the Transfer Type in the Call Settings is set to **Ask** an **Attended** check box will appear in the Transfer Action Panel allowing the User to specify if the transfer should be attended or not. See Preferences for more information.

Hold (Hot Key: H)

Used to toggle the hold state on one of your calls.

Hangup (Hot Key: X)

Used to hangup one of your calls.

Park (Hot Key: P)

Used to park a **Call** in a specific **Parking Lot**.

Conference (Hot Key: R)

Used to create a dynamically generated Conference Room.

Name
The display name of the Conference Room.

Options
The options for the Conference Room.

- Announce User Count: The number of users will be announced when a user enters the Conference Room.
- Announce User Join: The Conference Room will announce when a users are entering and leaving the Conference Room.
- Disable Join Notification: If checked users will be prompted to specify their name before entering the Conference Room.
- Allow Exit Via # Key: If checked users can hit the # key on the phone to exit the Conference Room.
- Music On Hold For One User: Music on hold will be played to the user if they are currently the only one in the Conference Room.
- Present Menu via * Key: If checked users can hit the * key on the phone in order to access the Conference Room menu.
- Record: If checked the Conference Room will be recorded.

Users

Specifies the list of Users that are going to be invited into the Conference room when it is created. The Default Account (See My Stream Widget for more information) will be used for each user when dialing them to enter the Conference Room.

Queue (Hot Key: Q)

Allows users to manage agent queue logins for a specific **Source Extension** in a specific **Queue**. Users can perform the following actions via this action panel.

- Login/Logout a specified extension to and from a Queue.
- Pause/Unpause an agent in a Queue.
- Set the penalty of an agent in a Queue.
- Pause/Unpause ALL of the User's agents in ALL Queues.
- Logout ALL of the User's agents from ALL Queues.

The total number of Agent logins that the user currently has will be displayed in the Queue action button.

Chat

iSymphony comes with a built in Chat system that allows Users to perform simple point to point instant messaging with other Users in the system.

The iSymphony Chat system does not rely on any external chat servers and will function out of the box.

Starting Chat Sessions

Users can click the **Chat Button** on a User Box in the Users Widget in order to start a Chat session with that User. A Chat session Account will be added to the Account List in your My Stream Widget. You can select this Account to view the Chat Panel for the session.

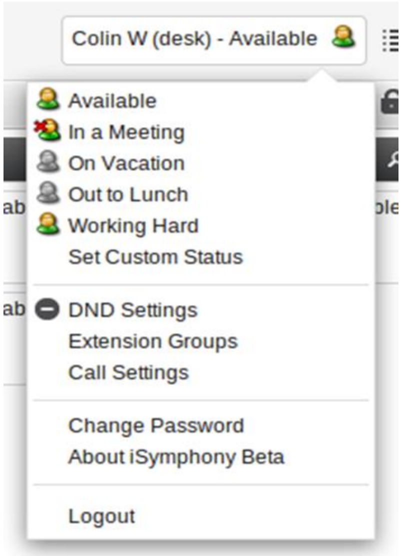
Sending Messages

Once a Chat session is started and you have the Chat Panel open for the session you can enter the text of the message in the text area in the Chat Panel and hit the **Enter Key** to send the message.

To insert line breaks in your Chat messages you can use **Shift-Enter**.

Ending Chat Sessions

When you wish to end a Chat session you can click the **X** button on top right hand corner of the Chat Panel or select the **X** button on the Chat session Account on the Account list in the My Stream



Widget.

User Menu

On this page:

- Status
- DND Settings
- Extension Groups
- Change Password
- Preferences

The iSymphony Client Interface provides a User Menu in the top right corner to allow the logged in user to control their presence and configure options in iSymphony. When the User Menu is closed, it displays the user's display name, along with their current status.

Status

The top section of the user menu lists all the pre-defined status settings for the user, along with an option to set a custom status. Selecting any of the statuses will set the user's current status to that one, and selecting the custom status option will display a dialog box allowing the user to enter their own status. See the Presence Management page more information regarding user statuses.

DND Settings

The **DND Settings** menu item will display a dialog allowing the user to set or unset their extensions in Do Not Disturb mode.

Extension Groups

The **Extension Group** menu item will display a dialog that allows users to create and manage Extension Groups in a similar fashion to the iSymphony Administrator Interface. Users will only have access to the Extension Groups that they have permission to view and manage. See the Extension Group Administration document for more information on the settings available for Extension Groups.

Change Password

This allows the user to change their iSymphony login password.

Preferences

The **Preferences** menu item will open a dialog allowing the user to configure settings to personalize their experience using iSymphony.

PBXact Dial Action Codes

Overview

The Feature Code module is where you can view all the feature codes that are built into your PBX.

Handset Feature Code	Action
*30	Blacklist a number
*31	Remove a number from the blacklist
*32	Blacklist the last caller
*52	Call Forward No Answer/Unavailable Activate
*53	Call Forward No Answer/Unavailable Deactivate
*72	Call Forward All Activate
*73	Call Forward All Deactivate
*74	Call Forward All Prompting Deactivate
*740	Call Forward Toggle
*90	Call Forward Busy Activate
*91	Call Forward Busy Deactivate
*92	Call Forward Busy Prompting Deactivate
*70	Call Waiting - Activate
*71	Call Waiting - Deactivate
*34	Perform dictation
*35	Email completed dictation
*76	DND Toggle
*78	DND Activate
*79	DND Deactivate
666	Dial System FAX
*21	Findme Follow Toggle
*68	Wake Up Calls
411	Phonebook dial-by-name directory
*45	Queue Toggle
*0	Speeddial prefix
*75	Set user speed dial
*97	My Voicemail
*98	Dial Voicemail
*80	Intercom
4	All Page

References

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