

1 ACCESS YOUR DASHBOARD

1.1 ACCESS YOUR DASHBOARD

After you have successfully registered and placed an order, you will receive an email with your order and login details.

Follow the steps below to login to your account:

1. Navigate to <https://www.virtualnumber.co.za>.
2. Click on the 'My Account' link.
3. Enter you username and password as received in your registration email.
4. Your Dashboard will be displayed.

Note: To setup your number you need to open your Virtual PBX by clicking on the 'Launch Setup' link on your dashboard.



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2 MOBILE APPLICATIONS

2.1 INSTALLING PHONE.SYSTEMS APP

INSTALLING THE PHONE SYSTEMS APPLICATION

Help Guide



Phone.Systems is our free Softphone trusted by millions of users worldwide.

By using the Phone.Systems mobile application, you can receive incoming calls to your mobile via the mobile applications without paying for any call forwarding costs. Follow the steps below to install the Phone.Systems mobile application:

Step 1

Download the application by using any of the below links:



[https://play.google.com/store/apps/details?](https://play.google.com/store/apps/details?id=com.pbxwww.mobile.app&hl=en)

[id=com.pbxwww.mobile.app&hl=en\)](https://play.google.com/store/apps/details?id=com.pbxwww.mobile.app&hl=en)



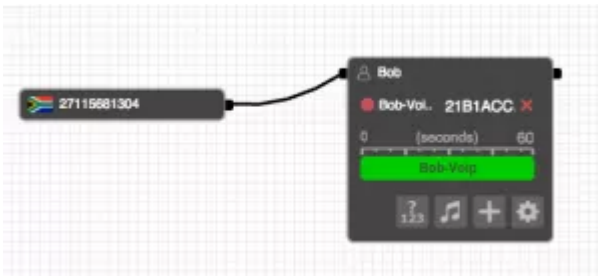
[https://itunes.apple.com/us/app/phone.systems-pbx-mobile-client/id708733931?s=1&mt=8\)](https://itunes.apple.com/us/app/phone.systems-pbx-mobile-client/id708733931?s=1&mt=8)

Step 2

[Login \(https://www.virtualnumber.co.za/oldsite/pbx/\)](https://www.virtualnumber.co.za/oldsite/pbx/) to your account and click on the launch setup link. Your setup will now open.

Step 3

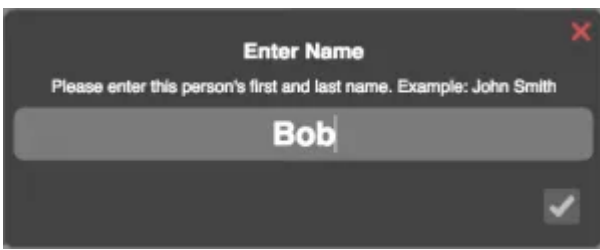
A basic setup should have a 'Number' object (Your Virtual Number) as well as a 'Person' object on the canvas. Connect the Virtual Number and the Person object by dragging a cable and click on the 'Gear Icon' to configure the 'Person' object. See image below:



** Note if you already have a person object with a mobile number please expand your object and click on the '+' sign to add a new contact method.

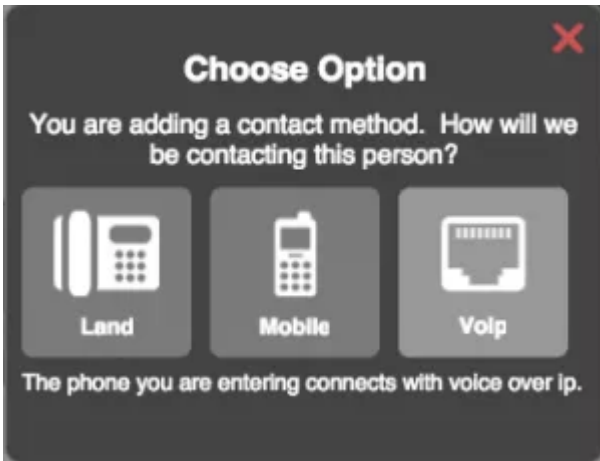
Step 4

Start by giving the 'Person' object a unique name (Bob in the image below).



Step 5

Next select 'Voip' as the forwarding method.



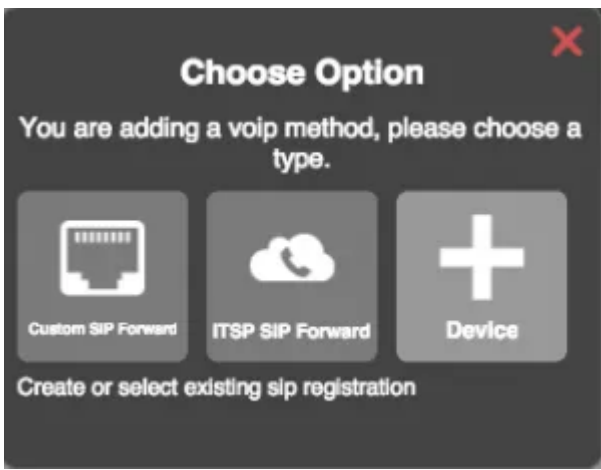
Step 6

Give the forwarding method a unique name (Bob-Voip in the image below).



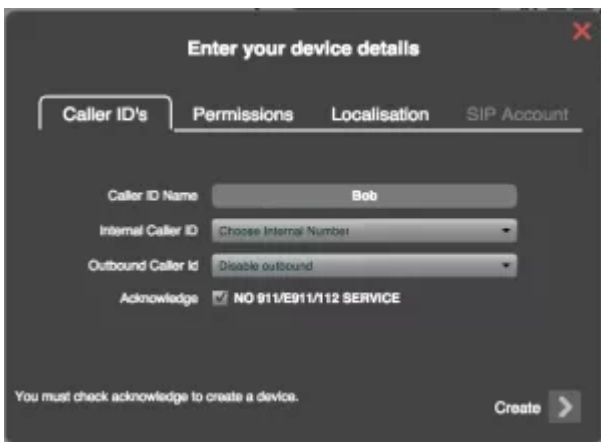
Step 7

Select 'Device' as the forwarding option.



Step 8

On the next screen select an 'Outbound Caller ID' if you would like to enable outbound calls and tick the 'Acknowledge' check box. When done, click on the 'Create' button.



** Note that outbound calls are charged using our call rates.

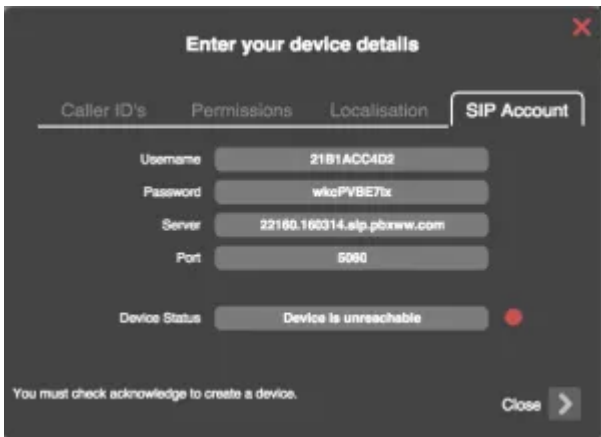
Step 9

On the 'Permissions' tab, select whether you would like to enable outbound recording. (only available if you have selected to enable outbound calls). Next click the 'Create' button.



Step 10

When the 'SIP Account' tab opens you can click on the close button with the arrow to save the mobile app connection. Now open the Phone.Systems mobile application on your mobile phone.



Step 11

From the Phone.Systems App Menu, select the 'Device Authorization' menu and click 'Authorize'.

What is phone.systems Mobile?

This application is the mobile extension of your phone.systems cloud-based phone system. It offers special features that are usually available only to phones located in your office or at your home.

www.phone.systems



Cancel

Authorize

Step 12

Next select the option 'Scan QR code'. The QR code scanner will now launch on your mobile phone.

Login to your existing phone.systems account

Scan QR Code

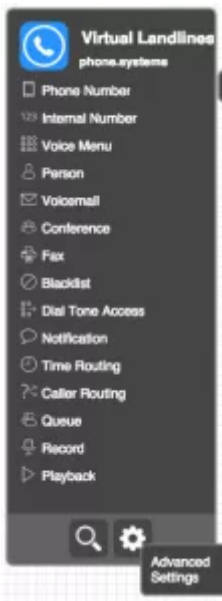
Enter PIN Code

Explain how?

Cancel

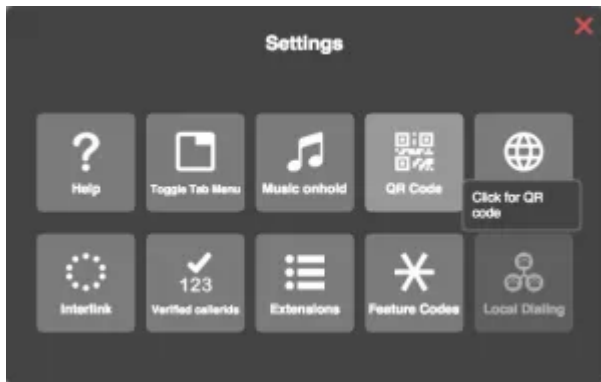
Step 13

Navigate back to your setup panel and click on the settings 'Gear' icon on the left hand bottom under all the object menu's.



Step 14

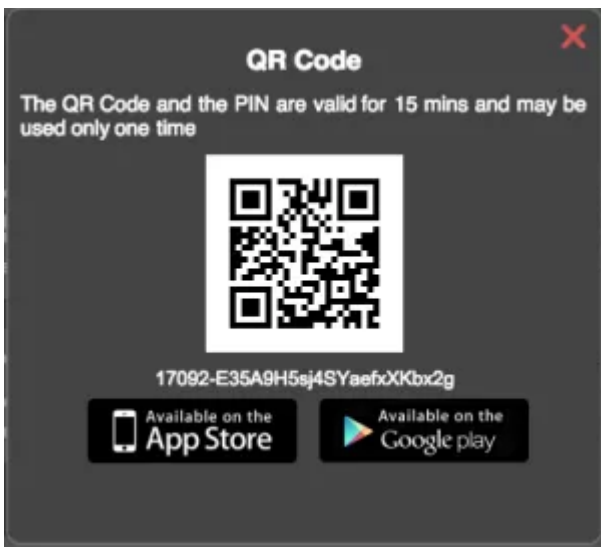
Select 'QR Code' from the menu. The QR code will then be displayed.



Step 15

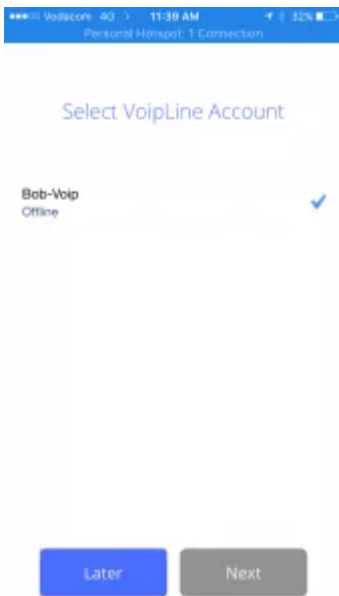
Using your mobile phone (which should have the QR scanner open – refer to step 12), scan the QR code displayed on your screen.

** Note, the below QR code is an example only and the QR code on your own setup panel needs to be scanned.



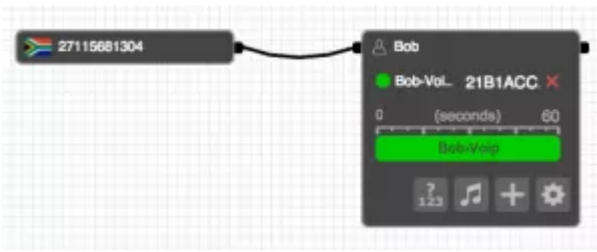
Step 16

Next you will be prompted to select the Voip Account you created in Step 6.



Step 17

Your application should now be active and all calls will be transferred to Phone.Systems. To confirm that the application is correctly set up, your setup panel should have a green light next to the device. See image below.



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2.2 INSTALLING ZOIPER APP



Zoiper is a free Softphone trusted by millions of users worldwide.

By using the Zoiper mobile application you can receive incoming calls to your mobile via the mobile applications without paying for any call forwarding costs. Follow the steps below to install the Zoiper mobile application:

Step 1

Download the application by using any of the below links:



<https://itunes.apple.com/za/app/zoiper-sip-softphone->

[for-voip/id438949960?mt=8\)](https://itunes.apple.com/za/app/zoiper-sip-softphone-for-voip/id438949960?mt=8)



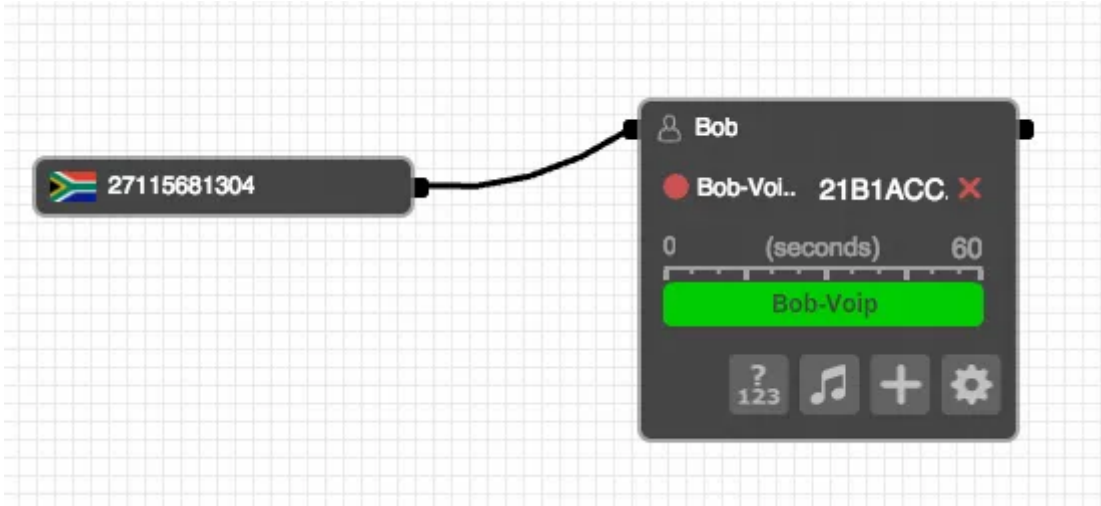
[https://play.google.com/store/apps/details?id=com.zoiper.android.noinapp.app&hl=en\)](https://play.google.com/store/apps/details?id=com.zoiper.android.noinapp.app&hl=en)

Step 2

Login (<https://www.virtualnumber.co.za/oldsite/pbx/>) to your account and click on the launch setup link. Your setup will now open.

Step 3

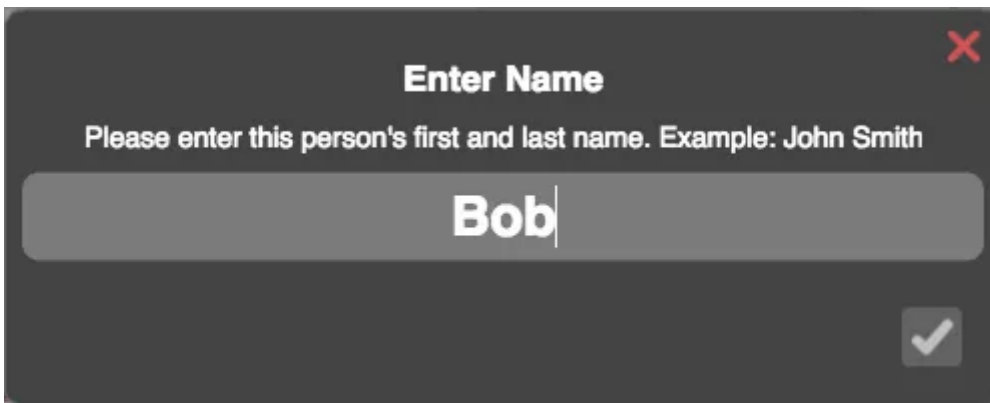
A basic setup should have a 'Number' object (Your Virtual Number) as well as a 'Person' object on the canvas. Connect the Virtual Number and the Person object by dragging a cable and click on the 'Gear Icon' to configure the 'Person' object. See image below:



** Note if you already have a person object with a mobile number please expand your object and click on the '+' sign to add a new contact method.

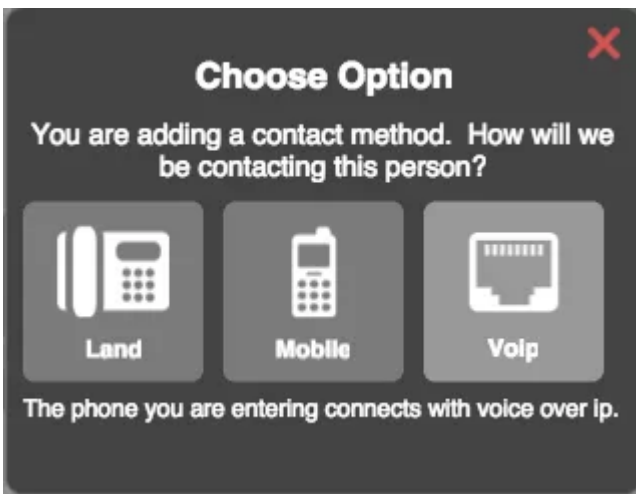
Step 4

Start by giving the 'Person' object a unique name (Bob in the image below).



Step 5

Next select 'Voip' as the forwarding method.



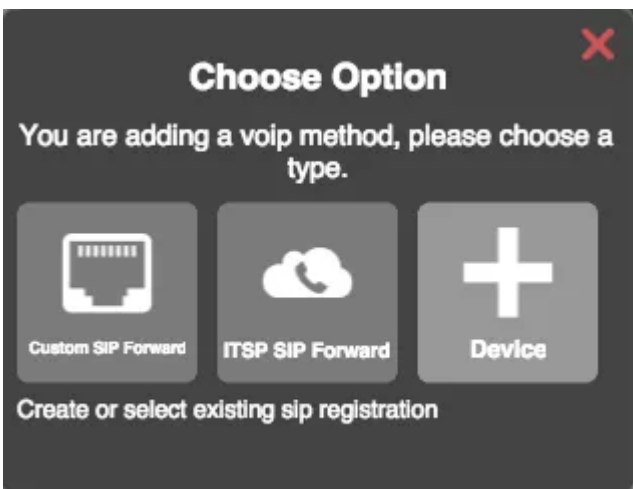
Step 6

Give the forwarding method a unique name (Bob-Voip in the image below).



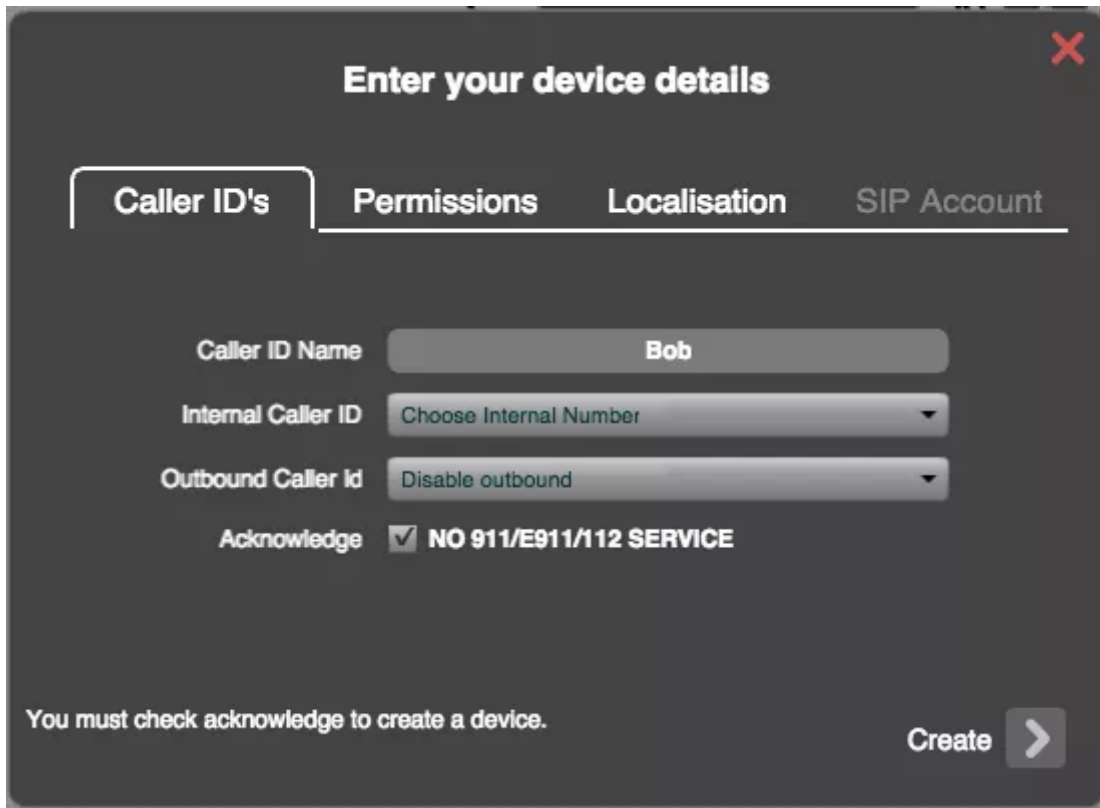
Step 7

Select 'Device' as the forwarding option.



Step 8

On the next screen select an 'Outbound Caller ID' if you would like to enable outbound calls and tick the 'Acknowledge' check box. When done, click on the 'Create' button.



The screenshot shows a dark-themed form titled "Enter your device details" with a red close button in the top right corner. The form has four tabs: "Caller ID's" (selected), "Permissions", "Localisation", and "SIP Account". Under the "Caller ID's" tab, there are four fields: "Caller ID Name" with a text input containing "Bob"; "Internal Caller ID" with a dropdown menu showing "Choose Internal Number"; "Outbound Caller Id" with a dropdown menu showing "Disable outbound"; and "Acknowledge" with a checked checkbox and the text "NO 911/E911/112 SERVICE". At the bottom left, a message reads "You must check acknowledge to create a device." At the bottom right, there is a "Create" button with a right-pointing arrow.

** Note that outbound calls are charged using our call rates.

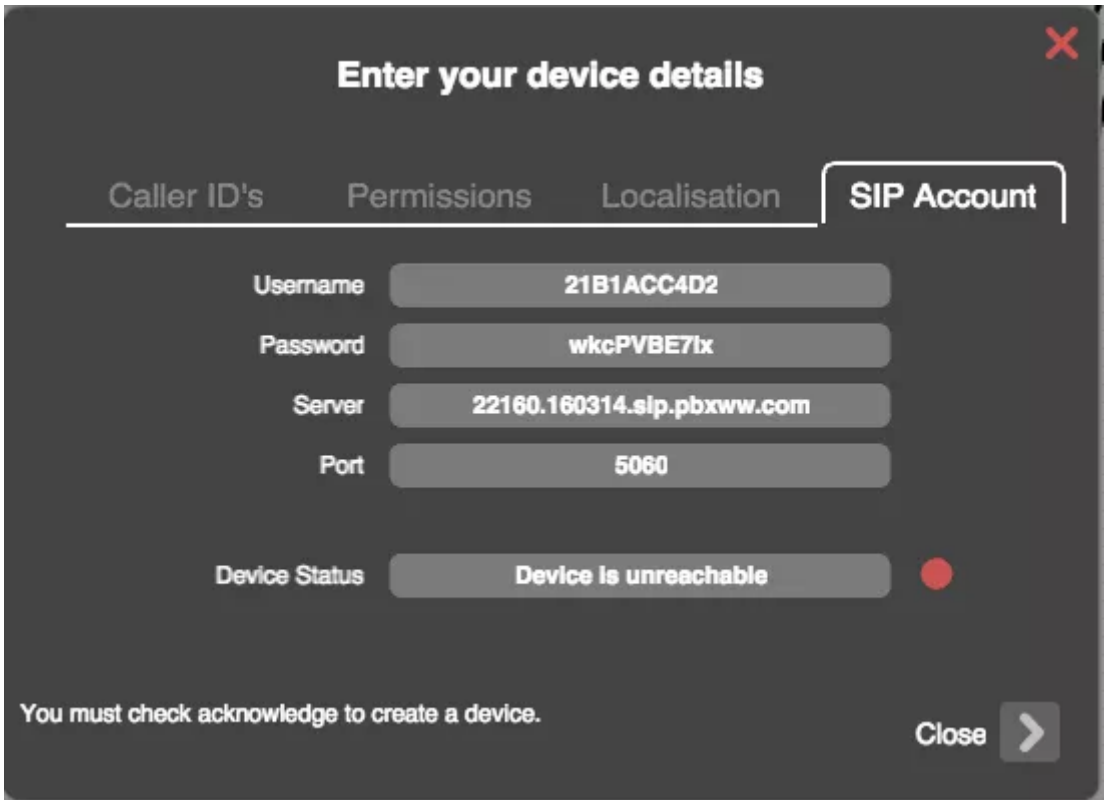
Step 9

On the 'Permissions' tab, select whether you would like to enable outbound recording. (only available if you have selected to enable outbound calls). Next click the 'Create' button.



Step 10

When the 'SIP Account' tab opens you would need to **keep this screen open** and open the Zoiper application on your mobile phone.



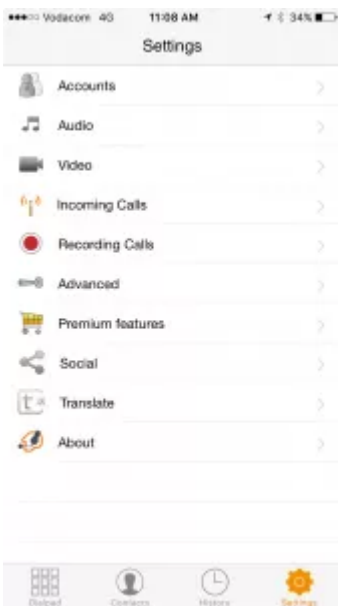
Step 11

From the Zoiper App Menu, select the 'Settings Tab'



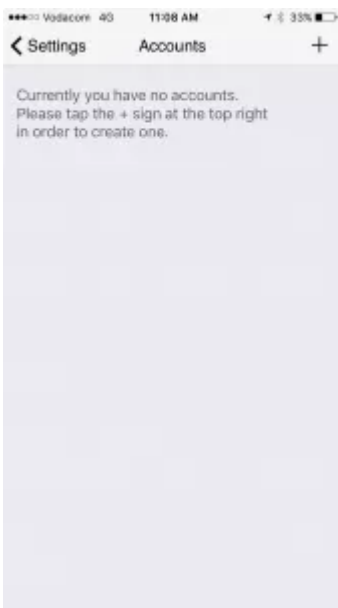
Step 12

Click on the Account menu item.



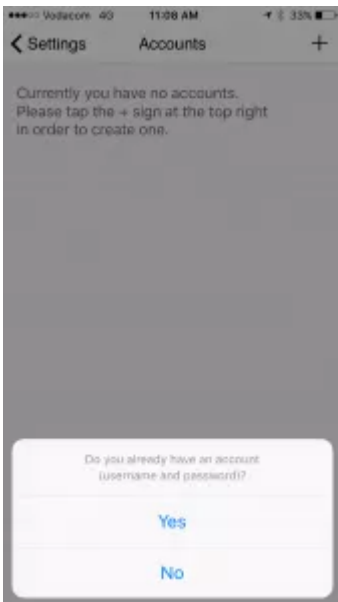
Step 13

Click on the plus sign to create a new account.



Step 14

When prompted 'Do you already have an account?' select Yes.



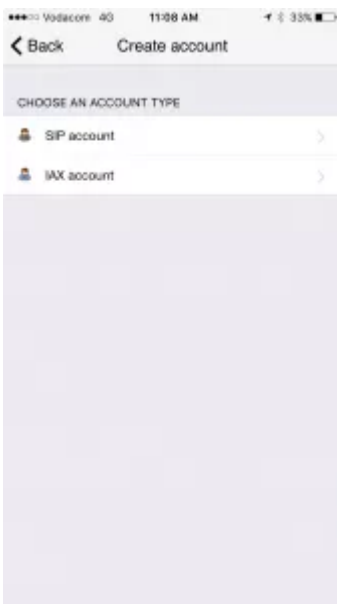
Step 15

Select 'Manual Configuration' from the menu.



Step 16

Select 'SIP Account'



Step 17

Now you will need to enter the information from your setup panel (Refer to step 10) into the mobile application:

Account Name: Your Unique Name

Domain: 'Server' in Step 10

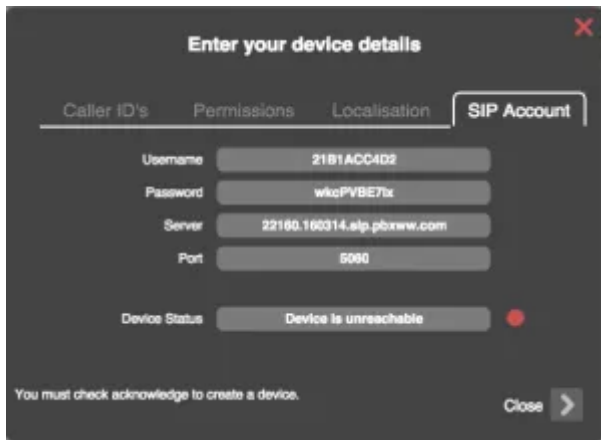
Username: 'Username' in Step 10

Password: 'Password' in Step 10

Caller ID: Your Virtual Landline Number

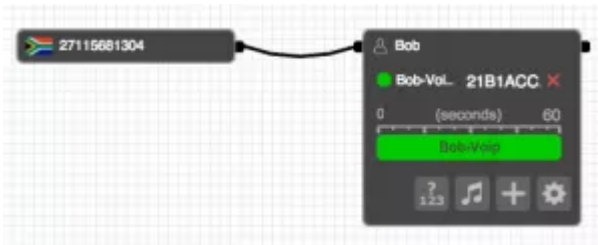
TIP: If you are using the iPhone application, please scroll down to 'Network Settings' and select 'TCP' under Transports. This will ensure calls are always presented when iPhone is locked.

When done, click on the 'Create' button on your PBX Setup Panel and then on Zoiper, click the Register button.



Step 11

Your application should now be active and all calls will be transferred to Zoiper. To confirm that the application is correctly set up, your setup panel should have a green light next to the device. See image below.



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3 OVERVIEW

3.1 VIRTUAL PBX OVERVIEW

Virtual Landlines Virtual PBX is a fully-featured, cloud-based virtual PBX that is fully compatible with all landlines, mobile phones, SIP devices and VoIM applications such as Google Talk. Multiple users, remote offices and telecommuters become part of a highly flexible, scalable and cost-effective phone system, supported by essential PBX services such as voice menus, voicemail to email, conferencing, queuing, time and caller routing, internal extensions, dial tone access and more.

Full mobile access is supported through iOS and Android-based applications, making smart phones an integral part of the Virtual PBX phone system. In addition, separate instances of your voice systems may be simply and securely interconnected wherever they are in the world via the Cable Interlink feature, allowing your remote offices and users to behave as a single telephone network.

The user interface for the Virtual PBX is specifically designed for simplicity and ease-of-use. No special training or expertise is required, and call flows are configured in an intuitive manner via a graphical web interface.

The Virtual PBX is applicable for both personal and business use, and configurations cover a wide range of applications from simple home use through to complex, multi-branch voice systems.

- By using the Virtual PBC setup panel, you are easily able to do the following:
- Receive calls from one or many local landline numbers;
- Make outbound calls via the mobile applications;
- Assign internal extension numbers that can reach users anywhere in the world;
- Forward calls to any phone number or VoIP destination;
- Play back custom recorded messages to callers;
- Direct calls using extension numbers;
- Send calls to a voicemail box;
- Send voicemail messages to selected email addresses;
- Receive faxes and forward them to an email address;
- Implement time and caller routing scenarios;
- Receive notifications for specified call events;
- Host conference calls;
- Implement blacklists to block incoming calls;
- Define custom SIP devices;
- Interconnect multiple PBX systems;
- Purchase voice services.

4 USER GUIDE

4.1 VIRTUAL PBX MOBILE APPLICATIONS

The Virtual PBX Mobile Application allows your smart phone to function as a mobile extension of your Virtual PBX phone system. You may dial your internal PBX numbers from your mobile device just as if you were in your office or home, and this application allows you to display any one of your virtual (local) phone numbers (for example, your business phone number) as the caller ID when making outbound calls from your mobile.



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4.2 ATTENDED TRANSFERS

Attended transfers are used if the call should be transferred only after first speaking with the person to whom the call will be forwarded. These transfers are achieved by pressing *2 on the phone keypad, or by using the transfer (xfer) button if available on an IP or soft phone.

- If a transfer (xfer) button is available, answer the incoming call, put that call on hold, call the required Internal Number (extension) on a second line, speak with the person to whom the call is to be transferred, press the transfer button and the call is immediately transferred. Note that the call may have to be

manually disconnected from the first line if your device does not do this automatically.

- If a transfer button is not available, answer the incoming call, enter *2 on the dial pad and then enter the required Internal Number (extension) when prompted. Once the call has been answered and you have spoken with the person to whom the call is to be transferred, simply hang up and the call will automatically be established between the caller and the required extension.



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4.3 BLIND TRANSFERS

Blind transfers are used if the call should be transferred without first speaking with the person to whom the call will be forwarded. These transfers are achieved by pressing *1 on the phone keypad, or by using the transfer (xfer) button if available on an IP or soft phone.

- If a transfer (xfer) button is available, answer the incoming call, press the transfer button, enter the required Internal Number (extension) and the call is immediately transferred.
- If a transfer button is not available, answer the incoming call, enter *1 on the dial pad and then enter the Internal Number (extension) when prompted. The call will then be transferred. Note that the Internal Number should be entered immediately after the transfer prompt.

While the call is being transferred, on-hold music is played to the caller. Once that call has been answered, the call is automatically disconnected from the person who originally answered that call.



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4.4 TRANSFERRING CALLS USING VIRTUAL PBX

Virtual PBX allows you to transfer calls anywhere within the PBX system such as to another employee, to the operator or to queue attendants, even if they are in different locations. Both “blind” and “attended” transfers are supported, allowing you to transfer the call with or without first speaking to the person to

whom the call will be transferred.

The Virtual PBX call transfer feature is available for connected SIP devices, PSTN and mobile phones, VoIP (ITSP) as well as the Virtual PBX Mobile Application, and uses assigned Internal Numbers for call transfers.



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4.5 THE WORKSPACE TAB MENU AND MULTIPLE PAGES

Virtual PBX allows you to split up your voice system into logical groups and functions that may be arranged over multiple workspace pages. This feature is very useful when building complex voice systems, such as a PBX for a multi-branch business. The various workspace pages are accessed via the tabs on the Workspace Tab Menu, and the tabs may be labeled so as to define the functionality of each workspace page.

Existing tabs may be deleted by double-clicking on a highlighted tab, and then clicking on the “X” on the right-hand corner of that tab.

In addition, tabs may be moved to different positions on the Workspace Tab Menu by clicking on the required tab and then dragging that tab along the Workspace Tab Menu.

Note that the visibility of the Workspace Tab Menu may be toggled on and off by using the icon at the bottom of the Palette menu.



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4.6 MOVING OBJECTS AROUND THE WORKSPACE

Once objects have been positioned on the workspace, they may be moved around and re-positioned as required. Each object may be moved individually by selecting the object with the mouse (depressing the left-hand button), and then dragging that object to the required position on the page. Note that if the object being moved is connected to any other objects, then the connecting cables will be “stretched” and re-positioned in order to preserve the PBX configuration.

Virtual PBX also allows you to drag multiple objects around the workspace in groups using a single mouse movement, allowing easy maintenance and modification of complex voice systems.

Groups of connected objects may be moved in two different ways:

- Move all connected objects – holding down the “Shift” key while dragging a specific object, moves all the objects that are logically connected to that selected object, including those objects that are not directly connected (are indirectly connected via secondary, tertiary, etc. cables) . The relative positions between all the objects are preserved.
- Move all child blocks – holding down the “a” key while dragging a specific object, moves all the objects that are connected to the right-hand side of that selected object, including those objects that are not directly connected. The relative positions between all the child objects are preserved.

In order to facilitate more complex voice systems, the actual workspace canvas is significantly larger than may be viewed in a single page. The canvas position may be moved by placing the mouse at any blank position on the workspace, and then dragging the mouse in the required direction.

Note that the X and Y coordinates of the current workspace are displayed at the top right-hand corner of the screen when dragging objects off the default workspace position, so as to assist in the navigation process.

Yellow arrowheads appear at the edge of the page when “dragging” the workspace canvas to indicate the number of objects that are not currently visible due to them being “off the page”.



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4.7 PLAYBACK

Playback allows you to create a voice recording for later playback to callers. This object also functions as a text-to-speech utility.

The information to be entered for this object is:

The name of the Playback object.

An option to record/upload an audio message or use the text-to-speech utility for creating a voice message.

The text-to-speech option allows you to enter text that will be converted into speech. Over forty different languages are currently supported, and auto-fill fields (caller's name, caller's number and called number) are included so as to provide additional important details.

Firstly, select the language into which the entered text should be converted prior to playback.

You are required to enter a text message that will be converted to speech. Note the availability of optional auto-fill fields.

If you wish to create a voice recording for later playback, select the "Audio Message" option. You are given the option of creating a new recording, or uploading an existing voice message.

In order to record a message, follow the simple instructions shown. On completion of your recording, the message will be automatically uploaded to the Virtual PBX server.

Alternatively, a voice message file in .mp3 or .wav format may be uploaded.

Once the voice message has been recorded or uploaded, its length in seconds will be displayed on the right-hand side of the configured Playback object. To play the message back, click the arrowhead icon seen on the message timeline.



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4.8 RECORD

The Record object allows you to record phone calls. The call contents are sent to a predefined email address as an attachment immediately after the termination of each call.

The information to be entered for this object is:

A valid email address must be entered to which the call contents will be sent.

A usage example for the Record object is, where this object is inserted between a Phone Number and Person object so that all incoming calls forwarded to Mike Brown are recorded.

4.9 QUEUE

The Queue object causes incoming calls to be placed in a queue, allowing a large number of calls to be handled, such as in a call center. This object includes a ring strategy that is used to define how those calls are divided between queue members. Music or other messages may be played to callers while they are waiting in the queue. In addition, the name of the queue is passed as part of the Caller ID to queue members using SIP devices. This feature is useful in the case of an agent who serves multiple queues (such as sales and technical support), and it allows that agent to determine from which queue the call is being forwarded.

The Queue object is connected to multiple queue members to whom calls are forwarded as per the defined ring strategy. It is important to note that when connecting cables from the right hand side of the Queue object to other objects, all cables are automatically labeled "Member". However, there is an option to generate a "No Answer" cable, which should be connected to the object (such as voice mail) to which calls are to be forwarded if the queue wait time exceeds the maximum configured value.

The caller also has the option of exiting the queue at any time by pressing the "0" key on their dial pad. You may inform callers of queue instructions by inserting a Voice Menu or Playback object with a voice recording in front of the Queue object.

The information to be entered for this object is:

The name of the Queue object. Note that this field must consist only of printable characters, as the name appears as a prefix in the Caller ID when calls are forwarded from this object to queue members using SIP devices.

The ring strategy to be used for this queue.

The options for the ring strategy are as follows:

- Ring all – ring all available queue members simultaneously until one answers.
- Least recent – ring the member who was least recently called by this queue.
- Fewest calls – ring the member with the fewest completed calls from this Queue object.
- Random – randomly ring a single queue member.
- Round robin – ring members using a round robin policy, noting the last member who answered a call.

When you click on a configured Queue object, the object details are shown, including the selected ring strategy and the maximum time that a caller may wait in a queue without having the call serviced. This timer is configurable for between 0 and 15 minutes (with a resolution of 15 seconds), and may be changed by stretching and dragging the timer icon along the displayed timeline bar. If a call is not serviced within the configured time, then that call is forwarded to the object connected to the “No Answer” cable.

The queue logic for a call wait time that exceeds the maximum configured timeout value is implemented by clicking on the icon. By doing this, the next cable that is generated from the Queue object will be labeled “No Answer” and should be connected to the object (such as voice mail) to which calls are to be forwarded if the queue wait time is exceeded.

Pre-recorded music, commercials or any other sound clip may be played to the caller while they wait in line for an available queue member. Clicking on the music icon on the Queue object, allows the user to create playlists and to add sound files to those configured playlists. Note that sound files to be uploaded must be in .mp3 or .wav format.

Multiple playlists may be created, and each playlist may have many sound files which are played successively and repeatedly to the callers on hold.

Songs, messages and other sound clips may be added to the playlists by clicking on the ‘Music’ button. Playlist items may be deleted by clicking on the icon next to the listed item. To play any listed playlist item, click on the arrowhead icon next to the listed item.

Playlists are activated by clicking on the button. Note that only one playlist may be activated at any one time. Once a playlist has been assigned to a Queue object, then the music icon on that object is highlighted in yellow so as to indicate that a playlist is active.

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4.10 CALLER ROUTING

Caller Routing allows incoming calls to be forwarded to different objects, depending on the originating phone number.

Caller Routing implements a simple “Yes/No” logic based on whether the originating phone number matches a phone number configured in the Caller Routing object. This object must be connected to two child objects such as Person or Voice Menu objects to which calls are forwarded according to this “Yes/No” logic. When the cables to the child objects are generated, they are automatically labeled “Yes”

and “No” respectively. The “Yes” option defines the routing of calls if the originating phone number matches a phone number included in the Caller Routing object, and the “No” option defines the routing in the case of a failure in the phone number match.

The information to be entered for this object is:

The name of the Caller Routing object.

The phone number/s required for the routing logic. Clicking on the icon on this object allows you to add phone numbers for the routing logic.

Phone numbers must be entered in E.164 format E.g. 2782, 2711 etc. and there may be multiple phone numbers per Caller Routing object.

Phone number prefix codes may be used as wildcards (minimum length of 2 numbers), and this is useful for the routing of calls on a geographic basis.

If necessary, phone numbers previously added to the Caller Routing object may be deleted by clicking on the icon to the right of the number.



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4.11 TIME ROUTING

The Time Routing object allows incoming calls to be forwarded to different objects, depending on user-defined day and time specifications.

This object includes flexible time rules, and call routing is based on a simple “Yes/No” logic. The Time Routing object must be connected to two child objects such as Person or Voicemail objects to which calls are forwarded according to this “Yes/No” logic. When the cables to the child objects are generated, they are automatically labeled “Yes” and “No” respectively. The “Yes” option defines the routing of calls if a day/time match occurs, and the “No” option defines the routing in the case of a failure in the day/time match.

The information to be entered for this object is:

The name of the Time Routing object.

The relevant time zone for which the configured time rules will apply.

The time routing logic. Day/time rules are created for each day of the week, defining the start and stop times for which incoming calls will be routed according to “Yes/No” logic. For each time rule, a start and stop time must be configured, and then each day to be included in this time rule must be selected by clicking on that day. The days that are included in the configured time rule are highlighted in blue.

Once a Time Routing object has been configured, clicking on that object displays current day/time rules that have been are created. Additional time rules may be created by clicking on the ‘+’ icon on the object.

Existing time rules may be modified by clicking on part of that rule to activate the time rule editing window. If necessary, previously added time routing rules may be deleted by clicking on the icon next to that rule.

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4.12 NOTIFICATION

The Notification object is used to provide alerts via SMS or email when a specified event occurs. For example, you may wish to be notified via SMS when a caller joins a conference or when a fax is received.

The information to be entered for this object is:

The name of the Notification object.

The notification method (either email or SMS).

For notifications via email, a valid email address must be entered.

Customized text for the notification email or SMS may be entered (up to a maximum of 300 characters), with auto-fill fields (caller’s name, caller’s number and called number) available so as to provide additional important notification details. These fields are inserted into the text by clicking on the required auto-fill field.

For notifications via SMS, a valid phone number must be entered in E.164 format:

E.g. 2782, 2711, 2721.. etc.

The country code is 1-3 digits long, while the city/area code and local number length can vary. Some examples of phone numbers in E.164 are 14162223333 for Toronto, Canada and 60321345678 for Kuala Lumpur, Malaysia.

Please note that any notifications sent via SMS will be automatically billed at a rate equivalent to two minutes of voice calls according to your pricing plan.

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4.13 DIAL TONE ACCESS

The Dial Tone Access object is used to provide outbound dialing access from the Virtual PBX system. Typically, this object will be connected to Phone Number or Internal Number objects, and users calling those numbers will be able to make outbound calls after providing a PIN code. If the PIN authentication is successful, then a dial tone is presented and the user may dial out, with phone numbers being entered in E.164 format E.g. 2782, 2711 etc. This methodology is also known as DISA (Direct System Inward Access).

The information to be entered for this object is:

A PIN code, of minimum length 4 numbers. This code must be correctly entered by the caller before a dial tone is presented for outbound calling.

A simple usage example of the Dial Tone Access object is shown below. Calls made to the Phone Number or Internal Number objects will reach the Dial Tone Access object, and allow that caller to make outbound calls after providing the configured PIN code.

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4.14 BLACKLIST

The Blacklist object is used to block incoming calls received on specified phone numbers.

The information to be entered for this object is:

The name of the blacklist.

Choose whether or not you wish to include the Global Blacklist (an international list of blocked numbers) in your filter.

Add any phone numbers that should be included in the blacklist filter by clicking on the sign and entering the phone number in E.164 format: E.g. 2782, 2721 etc.

Phone numbers that have been added to the blacklist may be deleted by clicking on the sign adjacent to that number.

The inclusion of the Global Blacklist may be simply enabled and disabled by clicking on the Global: ON/OFF status on the Blacklist object.

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4.15 CONFERENCE

The Conference object allows multiple callers to partake in a conference call.

The information to be entered for this object is:

A PIN code for accessing the conference room, with a minimum length of two digits. All callers wishing to take part in the conference must enter this PIN code correctly.

A simple usage example of the Conference object is shown below, where multiple international phone numbers as well as an internal number provide access to the conference facility.

The Virtual PBX includes real-time management of conferences, allowing you to view the names and phone numbers of the participants and also to mute (by using the button) and remove any participant (by using the button).

Note: If configured, the virtual landline will only be used as conference call facility and cannot be used for incoming calls and conference calling at the same time.

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Fax

The Fax object allows faxes to be received and to be forwarded to an email address.

The information to be entered for this object is:

The email address to which the received faxes should be sent.

Note: If configured, the virtual landline will only be used as conference call facility and cannot be used for incoming calls and conference calling at the same time.

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4.16 VOICEMAIL

Voicemail is a mailbox in which callers may leave voice messages, which are then sent to a specified email address on termination of that call.

The information to be entered for this object is:

- The email address to which the voicemail should be sent.
- A voice message that should be played for the caller. Note that this message may either be recorded directly, or may be uploaded from an existing file that is in the .mp3 or .wav format.

Follow the simple instructions to either record or upload a message. Once the message is in place, its length in seconds will be displayed on the right-hand side of the configured Voicemail object. To play the message back, click the arrowhead icon seen on the message timeline.

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4.17 PERSON

The Person object is configured with a single or multiple contact methods to which incoming external or internal calls are forwarded. Contact methods include land lines, mobile phones, VoIP and Google Talk, and up to three contact methods may be configured for each Person object.

An important feature of the Person object is the ability to define custom SIP devices. This facility allows users to call each other directly and to reach selected objects (such as conference and voice menu objects) via internally-assigned extension numbers. In addition, outbound calling may be enabled for custom SIP devices, including the ability to use specific Caller IDs.

Multiple contact methods may be included as a hunt group within a single Person object, and the ring times for each contact method and the ring sequences for the selected contact methods are fully configurable. If the first contact method is busy or remains unanswered for a set time period, the call goes

to the next device, and so on through the list of contact methods. Additionally, unanswered calls may be forwarded to voice mail or other objects.

The Person object includes the ability to configure playlists, so that pre-recorded music, messages, commercials or any other sound clip may be played to callers while they are waiting for their call to be answered.

The information to be entered for this object is:

The name of the person to whom the calls must be forwarded.

The contact method, with the options being Land (land line), Mobile (mobile/cellular phone), VoIP (Voice over IP), Google Talk or Device.

A unique name for this contact method. By default, Virtual PBX provides a name for this contact method consisting of the name entered and the contact method (in this case Mike Brown-Land).

Once you have selected a contact method, you must fill in the necessary information required for that option such as a phone number, SIP URI/SIP device details or an email address for Google Talk.

In order to use Google Talk, please add your personal Gmail contact address and did2gtalk@gmail.com to your (GTalk) contact list.

Note that if the Land or Mobile contact methods are selected, the phone numbers must be entered in E.164 format:

E.g. 2711, 2782, 2721 etc.

The country code is 1-3 digits long, while the length of the city/area code and local number may vary. Some examples of phone numbers in E.164 are 14162223333 for Toronto, Canada and 60321345678 for Kuala Lumpur, Malaysia.

An important feature of the Virtual PBX is the ability to use configured land and mobile phone numbers as the Caller ID that should be displayed when making outbound calls from IP phones. This is achieved via the Virtual PBX secure Caller ID Verification process. When land or mobile contact methods are added to a Person object, you will be asked if you wish to securely verify this number for use as an outbound Caller ID.

If you select the "Yes" option, then a 4-digit PIN will be immediately sent to you on the configured land or mobile number, selectable as either a voice message or an SMS.

Once you have received the PIN information, it should be entered in the verification window. If a correct PIN is entered, then this phone number may be optionally used as the Caller ID to be displayed when making outbound calls from IP phones.

If the VoIP contact method is selected, there are 3 VoIP options: Custom SIP Forward, ITSP SIP Forward and Device.

For the Custom SIP Forward option, you must provide a SIP URI. For the ITSP SIP Forward option, you must provide your username for the ITSP, and then select your ITSP from the dropdown menu of supported ITSPs provided.

The Device contact method allows you to define custom SIP devices, implement an internal dialing system, and enable outbound calling using these custom SIP devices.

In order to implement an internal dialing system, the SIP device details (Username, Password, Server and Port) as well as the Caller ID Name must be entered. Also, a single Internal Caller ID extension number may be selected from the drop-down menu. This number will be used for internal calling and will be displayed instead of your Virtual Number.

IMPORTANT: The Internal Caller ID dropdown list that is displayed consists of the internal numbers (or extensions) entered when the Internal Number objects were previously configured. Therefore, it is recommended that extension numbers be configured using Internal Number objects prior to configuring Person objects.

In order to enable outbound calling via this SIP device, the Enable Outbound Calls option must be selected, and a phone number must be chosen from a drop-down list of previously configured Phone Number objects. This number will act as the caller identification that is displayed when outbound calls are made.

IMPORTANT – there must be at least one configured Phone Number object on the workspace in order to enable outbound calling.

There are two options for the Caller ID that is to be displayed on outbound calling:

If you select a single phone number, then this number will always be displayed as the Caller ID.

If you select the CLID auto match, then an appropriate, country-specific phone number will be automatically displayed, depending on the phone number dialed. For example, if you dial out to the USA, then a USA Virtual Number (if configured) will be displayed as the Caller ID.

IMPORTANT – The Virtual PBX does not support emergency dialing. In order for this device to be created and enabled, you must agree to and accept this condition by selecting the “Acknowledge” option.

Additional configuration options are available for the Device contact method, and may be viewed by clicking on the More Options text. These options include call recording and message recording facilities.

The Enable Outbound Recording option allows all outbound calls made from this device to be recorded. A valid email address must be entered to which recordings will be forwarded on the termination of each call.

The *98 Message Record option allows voice messages for this device to be recorded and maintained by pressing *98 from the keypad on the SIP device. If this option is enabled, the language for the message recording prompts may be selected (options are English, French, Spanish, Portuguese, Russian and Hebrew).

The Device Status indicator serves as an indicator of the current status of this device.

An important feature of the Person object is the ring time/ring sequence options for the configured contact methods. When you click on a configured Person object, the object details are shown, including the ring times for each contact method which are displayed along a 60 second timeline bar. There is a single contact method shown as a yellow "stripe". The ring time is configurable (between 0 and 60 seconds), and may be changed by stretching and dragging the contact icon along the displayed timeline bar.

A Person object may be configured with multiple contact methods by clicking the '+' icon.

It is important to note that ring times and ring sequences may be changed by stretching and dragging the contact icon along the displayed timeline bar.

The configuration parameters for an existing contact method may be edited by clicking on the listing of that contact method on the Person object.

Existing contact methods may be deleted by clicking the 'X' icon next to its listing.

The Person object includes a Call Answer Confirmation feature for Land and Mobile contact methods. If this feature is enabled, then calls forwarded to the landline or mobile device may not be answered until a required code is entered on the phone keypad. This implies that unanswered calls will be directed back to your Virtual PBX call flow, and may then be forwarded to other voice objects such as alternative contact persons or your desk phone voice mailbox. Therefore, incoming calls are prevented from reaching unsuitable destinations, such as your private voice mail. The Call Answer Confirmation feature is enabled by clicking on the '?123' icon.

All of the configured Land and Mobile contact methods for this Person object are listed, and each contact method may be separately enabled or disabled for the Call Answer Confirmation feature. When a call is forwarded to the landline or mobile device using Call Answer Confirmation, the user is automatically prompted to enter a key code, such as "Press 1 to accept the call". This message may be selected from six languages, with the options being English, French, Spanish, Portuguese, Russian and Hebrew. If the correct key is not pressed within 5 seconds, then the call will be directed back to your Virtual PBX logic for further processing.

The Person object includes the facility to configure playlists, so that pre-recorded music, messages, commercials or any other sound clip may be played to callers while they are waiting for their call to be answered. Clicking on the music icon on the Person object allows the user to create playlists and to add sound files to those configured playlists. Note that sound files to be uploaded must be in .mp3 or .wav format.

Multiple playlists may be created, and each playlist may have many sound files which are played successively and repeatedly to the callers on hold. In the figure below, two playlists have been created: “Music on hold” and “Product Announcement”.

Songs, messages and other sound clips may be added to the playlists by clicking on the button. Playlist items may be deleted by clicking on the ‘X’ icon next to the listed item. To play back and listen to any playlist item, click the arrowhead icon next to that item.

Playlists are activated by clicking on the button. Note that only one playlist may be activated at any one time. Once a playlist has been assigned to a Person object, then the music icon on that object is highlighted in yellow to indicate that a playlist is active.

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4.18 VOICE MENU

The Voice Menu object is used for implementing an IVR (Interactive Voice Response) or automated attendant system. The Voice Menu plays a recorded or uploaded message and allows the caller to enter an extension number, with the call then being passed to the connecting object with the matching extension number.

The information to be entered for this object is:

- The name of the Voice Menu.
- A voice message that may either be recorded directly, or may be uploaded from an existing file. Typically this message would include information pertaining to extension numbers that are to be pressed by the caller in order to connect with people or departments.

Alternatively, a voice message in .mp3 or .wav format may be uploaded.

Once the voice message has been recorded or uploaded, its length in seconds will be displayed on the right-hand side of the configured Voice Menu object. To play the message back, click the arrowhead icon seen on the message timeline.

It is important to note that cables connected from the right-hand socket of the Voice Menu object to other objects are automatically numbered, and these numbers correspond to the actual extension to be entered by the caller in order to reach the required destination.

Cable extension numbers may be changed by simply clicking on the extension number on the connecting cable, and editing that number.

To disconnect a previously connected cable, place your mouse over the extension number and click on the “x” that appears below that number.

Two additional important call-processing options are available for the Voice Menu object. By clicking on the ‘!’ icon, the next cable generated from the Voice Menu object will represent the call flow for a call that has timed out (no key is pressed by the caller). For example, such an event may require that the timed-out call be sent to voicemail as shown below.

The ‘Circle’ icon defines the call flow where the caller provides an invalid key input. By clicking on this icon, the next cable generated from the Voice Menu object will define this call flow as shown below, where the call is sent to a Playback object, and a pre-recorded message is played to the caller.



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4.19 INTERNAL NUMBER

The Internal Number object is used for internal dialing and is applicable to SIP/VOIP networks. This facility allows users to call each other directly and to reach selected objects (such as conference and voice menu objects) via internally-assigned extension numbers. Note that one Internal Number object must be created for each internal extension required.

The information to be entered for this object is:

An internal number (extension number) that will be used for internal dialing (1 to 4 digits).

Once an Internal Number object has been configured, clicking on that object allows you to designate this internal number as ‘public’ or ‘private’.

If the symbol is visible (the default option on object configuration), then this internal number is public and is visible to and may be used by all instances of Virtual PBX that are interconnected via the Interlink feature. Alternatively, the internal number may be designated as being private by toggling to the symbol. In this case, the internal number is only visible to and usable by the current instance of Virtual PBX.



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4.20 PHONE NUMBER

This is the first object that needs to be dragged onto the canvas. The Phone Number object is configured with your virtual number previously purchased on which incoming calls are received.

When you open the Phone Number object for configuration, a list of previously purchased, (virtual numbers) will be displayed (including country and area codes). You may click on any of these phone numbers to select the virtual number that must be allocated to this object.

Note that a single phone number should be selected for this object.

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4.21 OBJECT CONFIGURATION

Calls are passed from object to object, with each object performing a specified function or set of functions. Virtual PBX objects fulfill almost any need that you may have on your virtual PBX system.

The functions and configuration options for the different types of objects are detailed below.

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4.22 CABLES

Cables are used to logically connect the objects that have been placed in the workspace area.

To create a cable, click the right-hand socket of an object, and this cable will follow your mouse pointer around the workspace.

In order to connect two objects together, place the mouse pointer with the attached cable over the left socket of the destination object and click on that socket. The objects will now be logically connected as required.

IMPORTANT – The Virtual PBX includes an intelligent cabling configuration assistant that serves to simplify the connection logic between voice objects by indicating possible cable attachment points.

To redirect a previously connected cable (connect that cable to a different object), place the mouse pointer over the cable until it changes color, and then click on that cable. The cable will now become detached and may be “dragged” and connected to other objects.

To permanently remove a previously connected cable, place the pointer over the cable, until it changes color and an “X” symbol is displayed at the centre of the cable. Click on the “X” symbol, and the cable will be deleted.

In some cases, the cables exiting the object (on the right hand side of that object) form part of the call logic. For example, when connecting a voice menu to other objects, the cables exiting the voice menu object are automatically allocated extension numbers (shown as a number in a circle on each cable). This allows you to define how calls should be forwarded according to the extension number entered at the voice prompt.

Note that the extension number may be changed by clicking on the cable number and then entering the required extension number information.

Similarly, when using time or caller routing objects, the two cables exiting the routing object form part of the “Yes/No” logic. The “Yes” option defines the routing of calls if a time or caller match occurs and the “No” option defines routing in the case of a match failure.



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4.23 OBJECT

There are number of different types of objects, each performing a specified function or set of functions. Virtual PBX objects may be arranged and inter-connected in a wide variety of combinations, with calls being passed from one object to another as required.

Objects are dragged from the palette (left menu) to the workspace (right canvas), and once an object has been added to the workspace, it must be configured. Note that unconfigured objects have red borders so as to indicate that user configuration is required before this object is functional.

A single click on the unconfigured object will display a notice “You need to configure this component”. To configure the object, click on the “configure” icon (found on the bottom right corner of that object) and enter the required information.

Configuration options for all objects are specified in the next section of this document.

Each object contains either one or two sockets which are shown as small protrusions on the left and/or right sides of the object.

These sockets are used for connecting the objects together via cables.

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4.24 TRASH

Trash allows you to delete objects that have been previously placed on the workspace. Drag any object over the trash and then release it in order to delete that item.

Note that a counter of the number of items currently in the trash is displayed (in this case).

The trash has a recycle facility, where the last 25 items placed in the bin may be recovered. By clicking on the trash, you may scroll through the deleted items by clicking on the left and right arrows, and recover selected objects by dragging them from the trash to the workspace.

The button serves to permanently delete all objects that are currently in the trash. Note that the trash is emptied on logout, and deleted items may not be recovered on the next login.

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4.25 WORKSPACE TAB MENU

Virtual PBX allows you to split up your voice system into logical groups and functions that may be arranged over multiple workspace pages. This capability is very useful when building complex voice scenarios, such as a PBX for a multi-branch business. The various workspace pages are accessed via the tabs on the Workspace Tab Menu, and the tabs may be labeled so as to define the functionality of each workspace page.

More information regarding this capability is detailed in the section The Workspace Tab Menu and Multiple Pages later in this user guide.

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4.26 WORKSPACE (OPEN SPACE/CANVAS)

Objects are placed onto the workspace and are then logically connected by cables in order to build the required voice system. Each object may be individually moved around the workspace, or multiple objects may be dragged around the workspace in groups.

Detailed information regarding advanced workspace techniques is found in the section [Moving Objects Around the Workspace](#) later in this user guide.

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4.27 PALETTE (LEFT MENU)

The palette serves as a listing of the various objects that may be used in setting up your PBX. In addition, this menu includes options such as support, language selection, Virtual PBX Interlink setup, menu toggling and the QR code for mobile applications.

In order to use a specific object, position your mouse over the listed object on the palette until that object is highlighted. Then press the left-hand button on your mouse, dragging that object from the palette and releasing it over the workspace.

Once objects have been positioned on the workspace, they may be dragged and re-positioned as required. The Virtual PBX also allows you to drag multiple objects around the workspace in groups using a single mouse movement, allowing easy maintenance and modification of complex voice systems.

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4.28 USING THE CONTROL PANEL

Our Virtual PBX is quickly and easily configured via a graphical web interface, with drag-and-drop objects being connected together to control exactly how you wish to handle call flows.

The components used in building applications are as follows:

- Object - there are a number of different objects, with each object performing a specified PBX function such as voicemail, time routing or conferencing.
- Palette – a menu listing the various objects that are used in building your PBX.
- Workspace – an area where the objects are assembled.
- Workspace Tab Menu – for displaying the different pages of your PBX workspace.
- Cable – used to logically connect objects together.
- Trash – used for removing objects from the workspace.

The initial Virtual PBX configuration screen consists of four components: the center Workspace where the PBX logic is assembled, the Palette on the left-hand side of the screen, the Workspace Tab Menu along the top of the screen and Trash in the lower right-hand corner. In addition, there is a Contact Method Counter in the top right-hand corner of the workspace, which keeps track of the number of different contact methods currently being used for this PBX account.



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