



# **Hosted Phone System Initial Setup & Orientation Guide**

**“Your Whole Office Solution Provider”**



<b>WELCOME</b>	<b>7</b>
<b>OVERVIEW</b>	<b>9</b>
How it works	9
ON-SITE	9
REMOTE SITE	9
HOSTED	10
PRICING	10
LINES	11
PER MINUTE	11
Why it's better:	12
<b>ENVIRONMENT EVALUATION</b>	<b>13</b>
Devices/Locations/Use	13
Data Availability/distribution	13
Redundancy & Backup (power/internet)	14
Fax	14
Paging	15
<b>Call Flow / Management</b>	<b>16</b>
Conditions	16
Multiple Extension Status	16
Holidays	17
Hours	17
Hunt List	17
Queues	18
IVR (Auto Attendant)	19
End Destination Management	19
<b>MEDIA MANAGEMENT</b>	<b>20</b>
<b>VOICEMAIL</b>	<b>20</b>
Notification	20
EMAIL	21
SMS	21
AUDIO NOTIFICATION	21
<b>FAX</b>	<b>21</b>
<b>CALL RECORDING</b>	<b>22</b>



<b>Phone Setup / Daily Use</b>	<b>23</b>
STATUS LIGHT	23
DSS-KEYS	23
LINE:	24
SPEED DIAL:	24
BLF:	24
PARK	24
SOFTKEYS	25
DIRECTORY	25
MESSAGE	25
CONFERENCE	26
HOLD	26
MUTE	26
TRANSFER	26
REDIAL	27
VOLUME	27
CALL HISTORY	27
BUTTON LAYOUT	27
EXTENSIONS	27
PARK	27
SPEED DIALS	28
CALL MANAGEMENT	28
<b>Web Portal Daily Use (Status)</b>	<b>30</b>
CALL HISTORY	31
Recording Retrieval	32
IVR/Que Log	32
Faxes	32
Stats	33
<b>External Device Integration</b>	<b>35</b>
External Destinations	35
Mobile App	35
SMS App	36



## WELCOME

The following has a intent to arm you, the client, with the knowledge and understanding of the full scope and capabilities of the PE Telecommunications Hosted Phone Platform. It is our purpose to make every aspect of its power within your reach to use and take advantage of. While nearly all of the system is fully accessible for you to configure and maintain, we do want to make it very clear. When you became a client of PEOffices.com you were not only getting a state of the art phone system but ALL of the support and deployment service. Not only for the initial setup but for as long as you are client. Whether small name changes or complete structural overhaul, ALL service & support of the system is COMPLETELY free of charge and is, in fact, INCLUDED.

Please use the which ever contact method is most convenient for you, in all cases your support request or information inquiries will be addressed with utmost importance and care.

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# OVERVIEW

## How it works

Let us start by talking about What a Hosted Digital Phone System is. For some context let's discuss a bit the different kind of phone environments that exist. DIRECT, ON SITE, REMOTE SITE, & HOSTED. In a direct environment, this is where phone lines are ordered from a provider and are plugged directly into the phone/phones that you answer. In this method, we would call the, NO SYSTEM, system. In this setup, if you have voicemail it would only be by an additional “answering machine” physically plugged into your phone line. In the same manner if you have more than 1 phone, they are all sharing physically the same phone lines.

### ON-SITE

In this deployment a given number of traditional phone lines are plugged into a management system onsite, or PBX. This PBX is in control of all the on site phone features, and it alone determines what features if any that your phones have. It has be to configured locally (typically from a series of phone digit dials and complicated series of audio menus). Examples would be Avaya, Panasonic Hybrid and many Cisco...

### REMOTE SITE

These systems operate much like the On-site systems, with many of the same limitations on volume, configuration however the PBX is hosted at another physical location. These systems would typically be in place where a corporate office wants to be in control and manage all the call paths for their organization while utilizing on ON-SITE system. They operate with VPN or other WAN networking standards to securely join offsite systems into the main office system. In these systems, the remote offices typically have zero access to configuration and ALL system changes even for the main office have to be completed by very experienced system engineers.



## **HOSTED**

A hosted phone system combines many of the benefits from all of the categories while eliminating a plethora of complications present in all of them. A hosted system is your system, decentralized. Each phone communicates directly with the cloud based phone system via the internet. All configurations, changes and capabilities are managed through a secure web portal.

An important difference with our hosted phone platform is in the technical term of Ethernet. While many of the existing phone system infrastructure operated on “phone lines” with consisted of a pair of wires. Digital phones operate much like a computer, and require the same ethernet cables to each phone. This is especially important to know prior to the phones installation. In most cases you will not be plugging the phones into the same lines that were going to your old phones. While this is not specifically traumatic, is is important to ensure a proper site survey has been completed prior to phone installation, as it can affect the install price, or at least the timeline.

## **How its different.**

There are an increasing number of companies offering this HOSTED style of platform. In fact it is quickly becoming the standard for communications. Offering both large and small businesses the flexibility and scalability that cannot be matched. How is PE different from the ever growing pool of communication companies offering a hosted platform however? There are a few BIG differences, both is marketing and deployment.

## **PRICING**

The way we have structured our marketing is one of the biggest thing that sets us apart from the hoards of competition. Rather than adopting the same business practices of the industry we sell you a phone system for a single BASE price, with allows for UNLIMITED devices, without ANY per device charge. This seemingly small adjustment allows for your



business to truly take the benefits to all parts of your business without the concern of use time / cost evaluations. Convenience and productivity are now the biggest concerns, rather than the monthly added costs of additional devices. This structural difference in our billing platform allows the small offices to benefit from the immense increases in productivity without stifling growth with cost prohibitive tiers. We have further broken the traditional telecom mold, by offering our FULL phone platform with ALL of its features and capabilities without any EXTRA charges. If the system offers the capabilities, you have access to them for no additional monthly charges. Call recording, Auto Attendant, Voicemail transcription, Call Que, Call Back Systems, SMS, Call campaigns, API integration. ALL WITHOUT ADDITIONAL FEES.

### **LINES**

Say goodbye to the term lines, this is actually the biggest hurdle for many clients in the first few weeks and months. In the pursuit of fully unlocking the potential of a modern phone system, the limiting enclosure of “lines of service” is no more. The most common way prospective clients describe their phone systems have always started with “We have “x” lines and a fax line...” To simplify the change, if you think of your phone number as a WEB address, you do not NEED a different domain name for every visitor. It is the same with our Fully Digital infrastructure. You no longer need hunt list numbers and roll over lines. The phone number becomes just the means of your customers to access your phone system. It is in fact your businesses phone system address.

### **PER MINUTE**

It almost feels like a throwback to an old way, however we have found that in pairing with the departure from PER DEVICE, the only alternative is Per minute. This is the most honest and cost effective way to bill a phone platform. For background purposes it is important to know, that all calls COST, hundreds of call centers and carriers worldwide deploy & maintain the infrastructure that facilitates phone calling. Even in a digital world of facebook messaging and facetime, while significantly reduced the facilities cost cannot be ignored. Then you also have taxes. Back to the billing structure however, inbound calls have



traditionally always been cheaper, since the majority of the pathways costs are paid by the caller. In that vein we have made the decision to NOT bill for inbound calls. Therefore what is left, is billing only for outbound calls. This model allows your bills to grow organically WITH your business rather than in large steps. Plainly your phone bill only increases, as your business volume increases. In a traditional model of PER LINE, you are essentially renting 24/7 365 a phone line. With this the phone companies have to price that, using a worst case scenario model, to make sure that they still make their profit margin regardless of use. In our per minute model, you are only paying for the phone “line” usage on a per second basis when you are using it. Finally to simplify and bring honesty to your bill, there is nothing extra added on... No use tax, federal tax, securities fees... EVERYTHING is bundled in the low per minute charge.

### **What's the same:**

You will still continue to have customers reach you with the same numbers they have always used. If you had currently been using another phone system, with little reservation we can assure you that ALL the features your have been accustomed to are available to you now.

### **Why it's better:**

In summary, the PE Telecommunications Hosted Phone System allows you to have unlimited access to all the phone features imaginable within an environment of cost effective sustainable growth structure, all while ensuring secure, un-interrupted customer access to your business. The decentralized nature of our system allows your business to add locations, new buildings, remote offices and even equipment at your home, without any complicated setups of costly fees. Keeping you with a unified business presence, ensuring your clients with the best experience.



## ENVIRONMENT EVALUATION

To ensure a successful initial setup, and enduring quality of service a thoughtful analysis of the installation environment is very important. In the following sections, and their supporting attachments we hope to facilitate a complete scope of work assessment. This will be a great resource for the initial installation but also as an ongoing reference for future needs. All of the following sections should be completed to the best of your ability within the [[SiteSurvey Document]]

### Devices/Locations/Use

As with most, there are several things to take into consideration when deploying new equipment. Knowledge of a few categories can ensure that the equipment specifications and use needs are a match. On the Site Survey, please complete a simple floor plan which locates the existing (and new) Phones. In the Device section of the [Site Survey Document] please fill out the sections with the same labels as in the floor plan, please specify the USE of the phone (scale of 1-5, 1 rarely used to 5, reception heavy use)

### Data Availability/distribution

Digital phones require computer rated ethernet to each phone, NOT the old telephone wires. If you can, please label the location of existing DATA jacks (the outlets that you plug your computers into) This is very important to know where if any new data runs we will need to facilitate for your new system. On top of data being required, the digital phones should be powered via POE (Power of Ethernet). For both ease and better data practices, it is much preferred to have a single piece of POE hardware. MOST office environments do not currently have POE standard. Please specify on the form if you do however. Also included in this section you can describe any new needs related to your computer network. WIFI access points etc...



## **Redundancy & Backup (power/internet)**

While there are many options at your disposal with our hosted phone system to handle the possible down internet, or power. (Specifically conditions to route calls differently to other locations or even cell phones). If continuity of on site service is highly important to you, we do have several options to eliminate or greatly reduce the possibility of outage. From simply a battery backup system to keep the phones and internet up and running during a limited power outage, or redundant internet providers, Cable & Cellular integrated with one hardware to virtually eliminate downtime due to internet outages.

## **Fax**

An often overlooked element of your office environment concerning telephones is your fax. While some offices as eliminated them entirely, some continue to rely on them heavily. With our hosted phone system, it includes some new options, but each come with differing setup. There are 3 setup options. #1 TRADITIONAL, in this setup an analog adapter will be installed onsite to provide traditional dial tone to your fax machine, all operations will remain identical. (PLEASE remember to locate the fax machine on your plan. #2 Hybrid In this setup, and analog adapter will be used, the same as the traditional setup, however the faxes will be initially received by our system, allowing for a 2nd tier of features. This is the most common setup for our clients. Most typically faxes are received and sent to email, freeing up the fax machine to only be used for outbound faxes. However it could also be configured to send the faxes to email AND continue to send the faxes also to your fax machine. #3 DIGITAL this is perfect for the office that does not currently have, or would like to convert to a completely paperless setup. Faxes are received by the system and forward to email or saved on the server for retrieval. Faxes are sent via the web interface. Please complete the FAX section appropriately.



## **Paging**

Loudspeaker, Intercom, Ringer all of these are terms under the paging section. If you currently have, or are wanting to implement this, it is very important to locate on your floor plan the SPEAKERS, and PA system (if existing) If you are looking for new, please make sure to specify that. We will reach out to you, if your system configuration is not apparent or for more details.



## Call Flow / Management

The following section on call flow & management should accompany the [worksheet] It is effectively the meat and potatoes of your phone system, especially how your clients interact with your system. The proper completion of the [worksheet] will allow us to effectively set up your system in the most optimum way, for both your usage and your callers interactions. Once you are finished you should have a really good feeling for how all the features, settings and conditions work together to make an automated personal and well functioning system.

### Conditions

are a powerful component of your phone system. Simply stated it is automating something based on “if then” conditions. In every situation you are left with a match or does not match situation. So a choice of 2 destinations are fulfilled. We will touch on a few of the most often used ones and their implementation. From an application standpoint conditions are applied to sort actions based on scenarios during different dates, times, event, and with those met follow a different plan of action. The following 3 conditions we most typically use, and are most often setup together in order FIRST above all other call flow options.

#### Multiple Extension Status

while this is a mouthful simply when a call passes the this condition it checks the selected status (offline, online, busy etc.) of 1 or more extensions. In most every situation this condition is used to detect power or internet failures. E.g. If all the extensions on your system are offline then it can be assumed that there has been a network or power outage. In these cases your system would route calls differently if all the extensions are offline. There are unlimited number of possible configurations however most commonly system setups would direct calls to designated cell phones or a hunt list of cell numbers, OR simply given a message of “temporary outage” and directed to leave a voicemail. In either case the callers will NEVER be lost due to an on site outage, unlike if you had an onsite or traditional system.



## **Holidays**

next in the conditions list would typically follow, IF all the extensions are online, THEN check the Holidays condition. Technically “holiday” is not a condition, this is just the most practical application for the Calendar or Date conditions. In the Date condition you will be given 4 slots to select dates to check. In the Calendar you will be able to add dates, with times and date ranges in a traditional calendar interface. This would allow you to plan a full year or more of system “holidays” Once the condition is met, typically the calls would be directed to a message or call list indicating that you are closed for the holiday. In any case it would be another layer of sorting.

## **Hours**

finally in our 3 tier traditional setup would be your business hours condition. Here you will see a MON - SUN time block where you can specify the hours each week. Typically used for select what happens after business hours, or during business hours. This would typically end the sorting conditions of the call flow. This final condition if met will direct the call to the next stage of the call flow.

In most all situations after the initial conditions are met calls would move on to some form or dial in method, Call Que, Hunt, IVR (auto attendant) it is in these sections that calls are now given direction to end user extensions or voicemails , cell phone etc.

## **Hunt List**

this is the most traditional and basic of call flow/management once a call makes it here calls are directed to ring a list of extensions or external numbers. This takes place until one of two things happens, either the call is answered or the timeout is met. If the timeout is met then the call proceeds to the timeout destination. In the situation of a huntlist, most typically the call would be directed to voicemail or an IVR especially when more than 1 voicemail box exist within your phone system. Again, this is typical, but your configuration could be completely different, upon timeout the call could



be directed to a different hunt list, or to a condition, like hours, or day of the week, endless possibilities. In the huntline configuration you are able to define which destination it will attempt to ring and how long until the “timeout”.

## **Queues**

similar to a huntlist with however with a few very useful differences. A call queue is most often used to manage larger call volumes. For this example we will assume that you have only 2 extensions assigned to ring when callers enter the Que. First of all the default setup for a call queue is MUSIC ON HOLD. Effectively once the caller enters the que they are placed on hold to wait for the next available representative. Because of this typically the caller will have already been greeted with a recording of some sort. I.e. “thank you for calling acme company, please stay on the line someone will answer your call shortly”. The benefits of a call queue over hunt list cannot be understated. The statistics are overwhelming, how much longer a caller will contently wait in a que VS ringing, or even being answered by an agent, then put on hold ( this one is even more frustrating to the caller then just ringing and going to voicemail) In addition to the on hold music, which could be your own company advertisements, periodically the caller can also receive a recorded message that may also give them a number to press, to escape the que (typically to a VOICEMAIL). A call que gives you a lot of call management options AND reporting options after the fact. You also have the option to announce to the caller things like “There are currently x people ahead of you” or other things like that, which you have probably heard calling other large businesses. Most typically these are disabled however. From a business aspect, they are really convenient to know, the callers have been answered, and you do not have to rush to answer the phone just cause it is ringing... you can finish you work and answer the call when you are actually ready to deal with the next caller.



## **IVR (Auto Attendant)**

stands for Interactive Voice Response, but most people just call them attendant menus. This would be your quintessential CALL TREE. “for x press y” your call tree can have as many branches as you want. You have several options including destinations for wrong key press. Time out, etc... you can have the message loop or hangup etc. every option can go to virtually any destination, HUNT list, Que, Voicemail, directly to a particular extension, forward to an external number (cell phone). Literally endless possibilities.

## **End Destination Management**

while this is not a specific feature of the phone system, it is an often overlooked area in a phone system deployment. In nearly every system deployment the client has more than 1 device ringing and has more than 1 voicemail account configured. This presents a problem. If the call is not answered (timeout) where does this call go. You can only send the call to 1 specific destination. Many times it is overlooked and the call actually goes NOWHERE. This results in the call just hanging up after the timeout period. While some clients want this, MOST do not. For this you have to have an end destination management. Commonly an IVR is used. For this example let us assume that there are 6 extensions and 6 voicemail accounts. A good end destination management option would be when the timeout is reached on the HUNT (or que) its destination is set for “Selection” IVR where the caller is given the choice between the 6 voicemail destination. Even in phone environments where there is only 1 voicemail, often, a IVR should be used to filter out the callers who are not interested in leaving a voicemail, or are automated calls (telemarketers) This would typically be a simple IVR giving them only 1 number to press “to leave us a message, press 1”

## **MEDIA MANAGEMENT**

a very important aspect of the setup of your phone system is the audio files which will be used within it. Everything within the phone system that gives audio information to the caller must have a



linked audio file. Each IVR has its own audio file, each Greeting message, has an audio file. Each Custom Music on Hold, has a file. If you decide to manage your own backend this is fairly simple process however from an initial setup standpoint, we utilize IBM Watson for Text to voice speech generation. With little exception, it works wonderfully especially for its initial setup. On the Call Flow Management Worksheet, Every, greeting, IVR, etc, must have the wording for what messages you want to use, OR attach audio files for each. If you opt to have real recorded audio any audio files can be submitted to our team to deploy for you in your system. After the initial setup feature codes can be assigned to re-record these messages from your phone... e.g Dialing \*211 will re-record the Initial greeting message, where \*212 will re-record the Selection IVR message. Once you have your system setup these feature codes can be created for you by our team.

## **VOICEMAIL**

the most recognized feature of a “phone system” mostly unchanged for years. In our system you can assign as many voicemail accounts and desired. They can be attached to existing extension, or they can be independent of any devices on your system. Upon creation a random pin number will be assigned, however if you wish to change it, this is easily accomplished.

### **Notification**

most the options within voicemail configuration center around notifications. Notably, how is the end user notified that a voicemail has been received. If an extension has a voicemail assigned to it, the voicemail light will be illuminated, however some times this is not sufficient.

### **EMAIL**

by assigning an email address, an email will be generated by the system including the audio file attached with a transcription of the call in the body of the email and the caller id.

### **SMS**

similarly you could also have text messaging be the standard for new voicemail messages. A custom message can be programmed which has whatever



information you wish to include, Transcription text, CALLER ID, TIME, NUMBER, any or all of this information. You could also just have a notification without any specifics “a message has been received for you”

#### AUDIO NOTIFICATION

Like text messages, you can also have the system forward the voicemail directly to an external number, for example: upon receiving a voicemail the system will call the designated cell phone, wait until answered then play the audio message that was left.

### **FAX**

another important part of phone system in call configuration that needs to be configured is FAX. This is usually fairly straight forward, as stated in the environment evaluation section, how you want to handle faxes plays a big factor in its setup. Either fax calls are directly pathed to the analog adapter device, or they are set to be received by the system directly, then forwarded on to either the analog adapter or simply to email. In certain HIPAA situations received calls will be stored on the backend to be retrieved by the client. An email will not contain the attached fax, as email does not always meet certain security requirements. In those cases the email notification would only be to inform the client that a fax is waiting to be downloaded in the backend.

### **CALL RECORDING**

while not directly related to call flow, its implementation does directly affect it. The PE Telecommunications Hosted Phone System offers its clients full use of call recording. From a call path perspective, it is important to specify your needs or wants in regards to call recordings. In most states it is required to notify the calling party if you will be recording the call. Typically accomplished with the phrase “this call may be monitored or recorded” If used at the beginning greeting message, this satisfies the notification legality. However this only works for inbound calls. It is for this reason,



that by default call recordings are only automatically performed at an option on inbound calls. For outbound recording it is most common to activate this feature manually only on calls that are deemed needed to record, after you have notified them about the call being recorded. Alternatively individual extensions can be configured to record ALL calls, can call pathing can be set that whenever calls go to that extension it plays a message first notifying that these calls are being recorded. When configured on an extension basis, call recordings can be setup to be emailed. Otherwise the recordings should be retrieved from the backend and stored when deemed necessary, call recordings are only stored for 30 days on our phone system.

## **Phone Setup / Daily Use**

In the following section we touch on the general phone features and daily use situations. It is intended to give you a confident understanding of the how and why for most given interactions on a daily basis. For purpose of this document we will be referencing the most common phone model that we have on deployment. Regardless of the phone model nearly all of the features will work identically from model to model.



## STATUS LIGHT

this light is quite simply to grab your attention to a possible issue that may need to be address. Most typically it is a visual indication of missed calls.

## DSS-KEYS

also referred to as multifunction keys, these are the top 8 keys on this phone. While there are only 8 buttons on this model, the last key (bottom right) also works as a page turn button with 3 pages, totalling 21 different programmable buttons. They are programed with many different destination and function keys. The following are the most common key functions and their basic use.

### LINE:

line keys can be programmed to allow the user to easy select which account to use for outbound calls. This is specifically useful in situations where a client is operating several businesses from one phone.



#### SPEED DIAL:

little description is needed for this. Simply put the programmed number is executed when the button is pressed. However a very convenient programming in our system allows for smart execution. If the phone is in ready state, (NOT on a call) pressing the speed dial will start a call to the designated destination. If however you are on a call, pressing the speed dial will automatically Blind transfer the call to the specified number in the button.

#### BLF:

i.e Busy Lamp Field monitoring. This is a multi use button, which operates two main functions. BLF keys monitor the status of a specified digital extension. This is accomplished with the following illuminations on the button **SOLID GREEN** - available **SOLID RED** - In Use **BLINKING RED** - ringing. The 2nd function is that of a speed dial. These buttons can be used to call or transfer calls to the designated buttons. One additional configured use is call pickup, if a monitored button is blinking red (or ringing) the call pickup feature can be initiated simply by pressing the blinking button.

#### **PARK**

call parking, while not directly related to BLF, is monitored by it thus we are going to for organization talk about it here. Call parking is a creature of a multiline or unlimited line system environment, and specifically NEEDED in a hosted phone system. Unlike a traditional phone system, a call placed on hold is NOT able to be picked up on another phone in the office. In a hosted secure phone system, the call cannot be picked up by another phone unless it is transferred to them. The call parking is a solution to this. When you have a call that needs to be answered at another phone or you need to page someone in the building to answer the call. Simply transfer the caller to a designated parking lot. The BLF light will turn RED. Now from any phone with that Parking lot programmed they can simply press the RED light associated with the correct parking lot to retrieve the call.



## **SOFTKEYS**

these 4 button under the main screen are software keys (softkeys) basically their operation changes depending on the state of the phone. E.g During a call the buttons are different, give your different options, than when the phone is at ready state (no calls)

## **DIRECTORY**

under the soft keys at the ready state is directory. Here is an address book that can be customized from the phonebook section of the back office. This allows a company wide directory or per department/phone to be provisioned, with nearly unlimited allowances.

## **MESSAGE**

the message light will illuminate in green when there is a new voicemail available. Pressing the button will take you to the voicemail management menu. Where you can retrieve your messages or access the mailbox options menu to record your voicemail greeting.

## **CONFERENCE**

the button is how you initiate a 3 way call. Operated by getting the first party on the phone, press the conf button will give you dial tone. Connect with the next party and join the 2 together by pressing the conf button again.

## **HOLD**

simply, will put the active caller on hold. To answer this call back again you will have to use the SOFTKEYS and press "resume" These phones can have multiple callers on hold. You navigate when calls you which to resume using the up and down arrows.

## **MUTE**

pressing this button toggles the mic state. On and off



## **TRANSFER**

this button initiates a transfer, when you talking with a caller, pressing transfer will automatically place the caller on hold, while you complete the transfer. The transfer can be completed in 1 of 2 methods (BLIND or ATTENDED) Blind transfer is simply [TRANS-->Number-->TRANS] as soon as the transfer key is pressed the 2nd time the caller is transferred to the destination number including the callers original CALLER ID. This means that the receiving number will see the caller ID of the original caller NOT you, the one who transferred it. ATTENDED transfers are made by [TRANS--->Number---> WAIT ---> INTRODUCE--->HANG UP] When the after pressing Transfer and dialing the destination number, after 4 seconds the dialed number will begin to ring, when they answer you can introduce the caller you are going to transfer. The call will be transferred when you hang up OR press the transfer button again. HOWEVER in this method if give you continued controls. In the dial party does not want to take the call, you can press the cancel softkey, the original caller will return to you, and you can finalize that call differently than transfer.

## **REDIAL**

like the redial command on most any phone, it will redial the last number. However in our system pressing the redial button once will bring up a list of the past dialed numbers. So you can select the number you wish to redial once selected you can press redial again to dial the highlighted number.

## **SPEAKER**

toggle for the speaker phone

## **VOLUME**

this is the volume adjustment for both ringer & earpiece/speaker volume.

## **CALL HISTORY**

from the ready state, one of the soft keys will be for Call History. From here you can easily navigate through recent calls inbound and outbound, and missed calls. You can call them back from this interface easily as well.



## **BUTTON LAYOUT**

in the extension assignment form, in the bottom section, is the button layout section. While you are able to program these buttons in ANY way that you desire, this sections will talk about some common practices that may make your experience the best.

### **EXTENSIONS**

the first consideration is the qty of extension (phones) in your office or phone system. In most small offices, the first button consideration should be 1 for each phone in the office to be configured via BLF

### **PARK**

the next consideration should be for parking lots. A typical rule of thumb, you should always have at least 1 or 2 for offices with 5-10 devices.

### **SPEED DIALS**

after those two then comes customization. For most offices 1 single button layout is used across all phone. However sometimes different layouts are used for different departments or uses.

So with those 3 button consideration you can build a button layout, when you are finished a button layout would have the extensions each with their own BLF key, 1 or 2 park keys and the remaining buttons with Speed Dials of commonly used office numbers. ( employee cell phones, MVP Vendors etc..)

## **CALL MANAGEMENT**

in most offices occasionally you may have to manage multiple inbound calls. Where you are on the phone, but there is another call coming in that must be answered by you. This can be done easily, since we have a digital system there is not a limited number of lines so the process is as follows. If you are on the phone and your phone indicated that you have another call coming in, the soft keys will change, one will now say "answer". If you press it, the caller you were talking to will immediately



be placed on hold and you will now be talking to the new caller. Now if you finish with the 2nd caller, and they hang up, your phone's softkey will now show resume. Pressing it, will resume the call with the 1st caller.

This would be a simple interaction, but the call management comes in when you have this happen with more calls or more variable. If, after answering the 2nd call you wanted to return and finish with the 1st caller before continuing with the 2nd. (the following assumes that you are in an office that does not have more than 1 person to answer the calls at the time) Simply press hold. The 2nd caller & the 1st caller are now on hold on your phone. (this can be done up to 5 callers) now simply use the direction keys to navigate up and down. With each press the caller id of the active caller will change, and when you have the correct caller selected, press the resume soft key.

While this form of call management is actually quite simple, it does illustrate the benefits of a call queue system. A QUE system basically automates the call management process. In a well managed call que environment that same description would have looked like this. I am talking to Caller #1 during the call, caller #2 as arrived in the call que, been greeted and informed that someone will answer them shortly. Then they are entertained with some delightful music on hold. Before #1 call is finished Caller number #3 has shown up. Upon finishing #1 call you hang up, 2 seconds later the #2 caller rings though to your phone. Having already finished with #1 you are fully present to take care of the issues that arise from #2 and #3 will wait patiently until you are finished.



## Web Portal Daily Use (Status)

The web portal is the online interface for any and all changes to the phone system. While some functions have to be done by us, most of your entire phone system is available to you, should you want to perform system changes yourself. That being said, outside of changes to your system there are some powerful archival portions of the web portal that are immensely useful should the need arise. Once you have your login credentials head over to the web portal <http://pepbx.com>

PE Telecommunications



Login

Username

Password

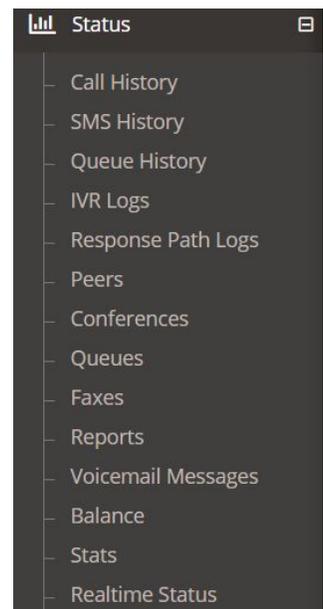
Login

[Change Password](#)

The following portions of this orientation will deal specifically with the STATUS portion of the Web Portal it encompasses most of the day to day needs of the average user. It does not include any bit of changes to your system, but archival statistics and some interactions.

CALL HISTORY | IVR & QUEUE HISTORY | FAXES | STATS

These are the primary areas which will will discuss inside of the web portal.



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## CALL HISTORY

The heart of the status panel, call history is the archival source for your entire phone system, all calls, inbound and outbound. Faxes, missed calls... Everything that happens is recorded here. With that however is a daunting amount of records, sorting and searching becomes a must. Though seemingly innocuous the magnifying glass symbol at the bottom of the page lets you start the parsing prospect.

In the first field you get to select the field you wish, the 2nd gives you a list of options for your results. Begins with, ends with, or contains... In most situations "contains" is a great function to use. (start or end) fields are used when looking for calls that take place in a particular time or date range. CallerID is the field that you want to use when looking for an INBOUND call from a specific number or name. For this best selection would be [CallerID, Contains, (number or part of the number)] then click find.

Start	equal	
Answer	not equal	
End	less	
CallerID	less or equal	
Source	greater	
Destination	greater or equal	
Duration	begins with	
Talk time	does not begin with	
Disposition	ends with	
Cost	does not end with	
Destination Context	contains	
Destination Channel	does not contain	
Userfield	is null	
Unique ID	is not null	
Sequence	is in	
Prev Unique ID	is not in	
Last Dst		
Where Landed		
Dst		
First Dst		

Start    equal    [ ]    [ ]

Reset    Query    Find

You can also ADD additional lines of search this will further limit your search.

So you could have the first row of search be START CONTAINS 02-04-19

For the 2nd line CALLER ID , CONTAINS , 6523924... This would give you search results that show ONLY calls from number containing 6523924 ON the 4th of February. With this is it possible to create complex and simple searches to refine nearly any desired results. Now you can export these results to XLS if desired.



## Recording Retrieval

In the same call history window is the archival and retrieval location for call recordings. The far right column “extra” will be a speaker icon, clicking these will allow you to listen or download the specified call audio.

## IVR/Que Log

The IVR and QUE log is effectively just a pre-parsed and re-formatted call history, for specific uses. For client who use either one of these call management styles will find these logs extremely useful. The IVR logs will show you the specific callers and the options that they chose within the IVR. The Que log, adds the columns of Hold time and call length, as well as the disposition, which tell basically whether or not the caller hung up before being answered. The details link on each call gives you all the information you might want, including length of call. Time on hold, and which agent answered the call.

## Faxes

for the client who have chosen to take advantage of digital faxing. This portal also gives clients a great way to manage their faxes. Much like the call history window, this will give you an easy access

see all inbound and outbound faxes the FILE icon  will allow you to download the faxes in PDF.

The  Send FAX icon will allow you to send faxes from any computer or mobile device.



Number:  

Schedule delivery:

Caller ID:

Fax quality:

Page size:

Page rotate:

File in PDF or TIFF format:  No file chosen

Email status to:

Delete after send

Simply enter the fax number you want to sent to. Schedule date/time if any and upload the PDF file that you want to send. You can also enter your email address to send status updates for that fax. Then click the send button.

## Stats

Finally we will talk about the stats window. This is the multi-purpose powerhouse of the analytical portion of the web portal. Giving you an easy to read report style exports of the usage throughout a specified date range.



Start date:

End date:

DID	Inbound		Inbound Answered		Inbound Busy Qty	Inbound No Answer Qty	Inbound Failed Qty
	Qty	Duration	Qty	Avg Duration			
	33	30	1:14:18	0:02:28		3	
	19	18	0:13:45	0:00:45		1	
	75	44	1:58:52	0:02:42		30	
<b>TOTAL</b>	<b>127</b>	<b>92</b>	<b>3:26:55</b>	<b>0:02:14</b>	<b>0</b>	<b>34</b>	<b>0</b>

Name (Extension)	Outbound Answered				Outbound Busy Qty	Outbound No Answer Qty	Outbound Failed Qty	Outbound Congestion Qty	Outbound TOTAL Qty	Outbound SMS Qty	Inbound Answered			Inbound Busy Qty	Inbound No Answer Qty	Inbound Failed Qty
	Qty	Duration	Avg Duration	Cost							Qty	Duration	Avg Duration			
	19	0:56:54	0:02:59	\$ 1.99148		1			20		27	0:44:44	0:01:39		33	
	3	0:06:46	0:02:15	\$ 0.23683	1				4		3	0:04:25	0:01:28		33	
	36	0:41:50	0:01:09	\$ 1.46419	1	2			39		52	1:43:32	0:01:59		33	
											2	0:00:34	0:00:17		33	
	2	0:03:11	0:01:35	\$ 0.11141	4				6		4	0:04:48	0:01:12			
	7	0:09:43	0:01:23	\$ 0.34008		4		4	15		18	0:13:45	0:00:45		1	
Other (N/A)				0	0	0	0	0	0		0	0:00:00	0:00:00	0	0	0
Local																
Custom																
FMFM																
<b>TOTAL</b>	<b>67</b>	<b>1:58:24</b>	<b>0:01:46</b>	<b>\$ 4.14399</b>	<b>6</b>	<b>7</b>	<b>0</b>	<b>4</b>	<b>84</b>	<b>106</b>	<b>2:51:48</b>	<b>0:01:37</b>	<b>0</b>	<b>133</b>	<b>0</b>	<b>0</b>

There is literally a larger trove of information than can be adequately described. Check it out for yourself.

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## External Device Integration

The final section of discussion will encompass that of external device integration. In most cases clients use external devices with out system without even knowing it. However there are a few areas that really need to have some attention.

### External Destinations

in many system setups external destinations are a regular thing. Cell phones, other office locations, and numbers... Any phone number not owned and within your system qualifies as an external destination. MOST telecom systems simply do not allow for this integration. With PE telecom however we gladly embrace these challenges. Simple programming on the back end enable out system to seamlessly integrate cell number external phone systems and destinations into nearly any aspect of daily operation IVR destinations even HUNT LISTS can allow for even multiple external destination. E.g. A hunt list could include 3 cell phones to ring at the same time that the 4 physical phone extensions are ringing.

### Mobile App

many times client have the desire or need to make and receive calls on mobile platforms especially cell phones. Allowing outbound calls to be made from the office number rather than exposing you private cell phone number. Also giving your cell phone similar functionality to that of a physical office phone ANYWHERE. With the various devices and platform we do not currently have a branded solution and leave it up to preference for our clients. We have endeavoured to keep our phone platform as universally useable as possible. However and easy to use and fairly universal app that we recommend most often is Grandstream Wave With only a few pieces of information you can quickly have a working mobile app.

The pictures below are the simple process with the installation of the grandstream wave app. When you obtain a username and password from us for your mobile app and install it. Once installed



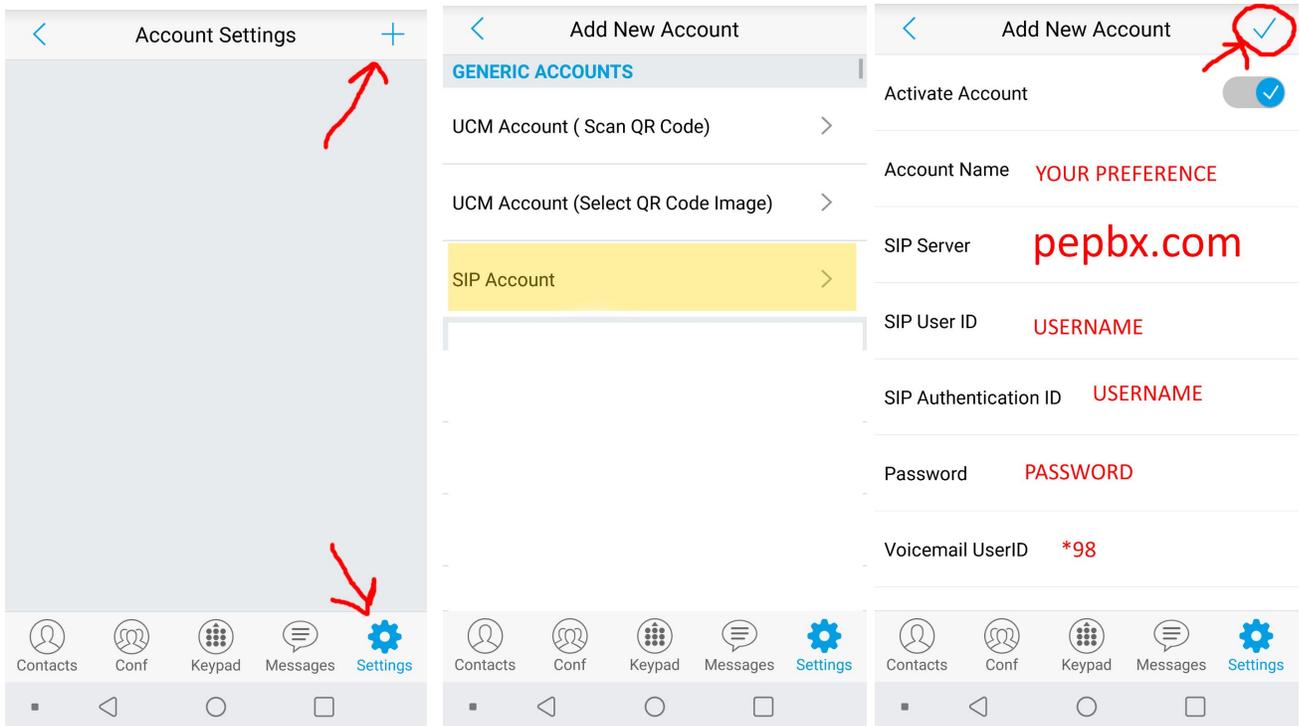
STEP 1 Press Settings

STEP 2 Press the “+”

STEP 3 Press SIP ACCOUNT

STEP 4 Fill in the fields as described

STEP 5 Press the CHECK MARK (top right) to save



## SMS App

another external device that is used from time to time typically PC/MAC based systems. When SMS integration is needed outside of the mass marketing modules of the web portal. Clients will use sms applications or SIP Clients with Messaging capabilities. Setup in the same manner which the mobile apps were installed. LINPHONE is the most prolific and well established software with cross platform functionality. Support in these and other deployments are provided as needed.