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# **Guide to Using PBX Wizard for Cheetah PBX Installation**

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# 1 About This Document

## 1.1 Intended Audience


This document is intended for PBX installers and system administrators. It has been designed to guide you through installation and configuration of your Cheetah 1000 PBX.


Having a basic knowledge of a PBX or IVR, Linux and Microsoft® Windows® is helpful but not required.

## 1.2 Conventions Used In This Document

This manual uses several conventions to help you learn to use the program quickly and easily.

Menus and dialog options that have an underlined letter in their name represent the shortcut key assigned to the menu or option. Pressing the shortcut keys assigned to the menu or option is equivalent to clicking the menu or option. For example, the following figure shows a sample menu that uses shortcut keys. Procedures in this manual reflect shortcut keys if they are available.

The Caution and Warning symbol, , indicates information or a step that could be potentially dangerous, such as a step that could permanently affect the database or a user's access to the program.

The light bulb, , indicates a tip or information that will help you in using this document.

## 1.3 Disclaimer

This document is provided to you for informational purposes only and is believed to be accurate as of the date of its publication, and is subject to change without notice. Telegato LLC assumes no responsibility for any errors or omissions in this document and shall have no obligation to you as a result of having made this document available to you or based upon the information it contains.

## 1.4 Logging In

To log in to the System Management Console refer to the Logging In Guide.

## 2 General

The Cheetah 1000 is a flexible, self-contained PBX. The Cheetah 1000 accommodates VoIP traffic, and up to two line interface modules.

This document will show you how to perform the necessary configuration to prepare your system to answer inbound calls and provide the many features available to those callers as well as people using the internal VoIP phones.

### 2.1 Auto-attendants

An auto-attendant differs from an IVR in that it typically only provides basic menus, plays audio files, and transfers callers. An IVR can:

- Use customer databases to provide callers information and updates databases.
- Record various messages from the caller such as name, address, reason for a call, etc.
- Send XML requests to other servers and read XML data returned in order to provide information to a caller.
- Execute complicated logic based on acquired caller data.
- Provide any number of menus to any depth.

### 2.2 Types of Auto-Attendants

There are generally two types of call treatments provided to inbound callers. The first is the most common and handles the needs of most businesses:

1. When the call arrives, a determination is made as to where the call going. We call these Work Groups. A Work Group is designed to handle calls for a logical group of extensions such as sales, billing, support, etc.
2. A determination is made, based on day of week and time of day, as to whether the Work Group is considered in normal working hours.
3. If in normal working hours:
  - a. The caller is played a welcome message specified in the Work Group configuration.
  - b. A simple menu of options is played to the caller.
  - c. The caller enters a digit and the PBX performs the operation specified by the menu option such as transfer the caller, play an audio message, etc.

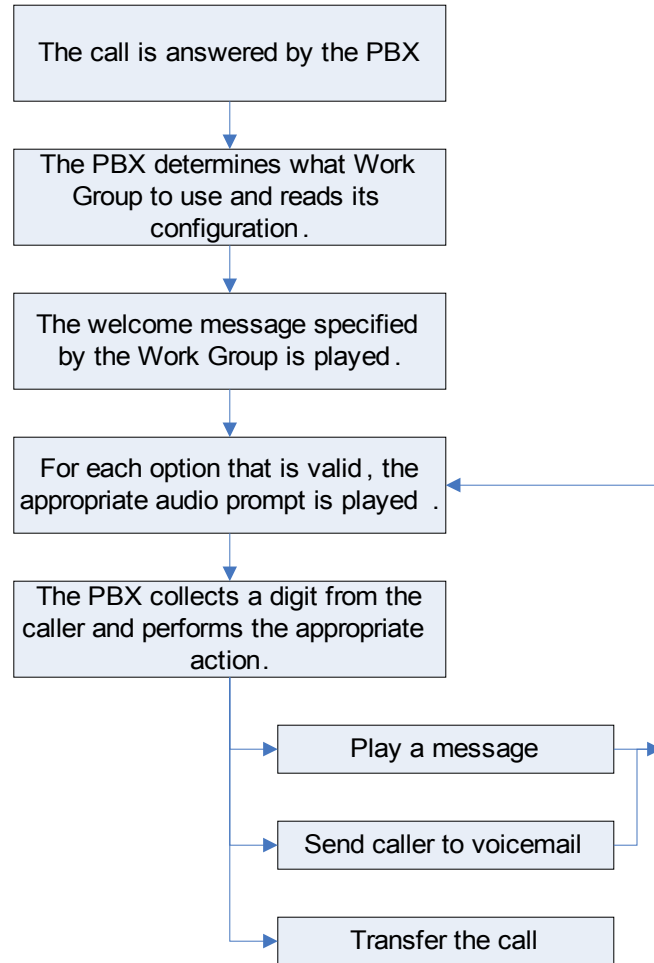
- d. Everything repeats start with b. above until the caller is transferred or hangs up.

**Note:** If it is not in normal working hours, then the Work Group configuration may specify a different operation such as played a business is closed message and then either going to the normal hours menu, going to voicemail, or hanging up.

The second type requires an IVR and must be scripted using a special IVR script language. While this can be done by anyone familiar with basic programming concepts, it is advised that the PBX end user seek professional services as very complicated IVR treatments can require writing several hundred line of IVR script code.

## 2.2.1 Call Flow of a Simple Auto-attendant

The following flow chart shows how the PBX treats a new inbound call for a simple call model:



This document will only address how to create the above simple call model. As noted earlier, any desire to provide more sophisticated call treatments should be discussed with a trained IVR specialist.

## 3 Preparation

### 3.1 Basic Preparation

At this point, all installation should have been completed. The system's IP address should have been set and your Ethernet network should be in place.

To make sure your PBX is on your network and functioning, please go to a PC, open a command window and type:

```
ping <pbx>
```

where <pbx> is the IP address you assigned to your PBX. You should see a response similar to this:

```
Reply from 192.168.1.13: bytes=32 time=45ms TTL=128
```

If instead you see something like this:

```
Request timed out.
```

Then there is a problem with your PBX in that it is either not connected to the same network your PC is connected to or the IP address is not what you thought. Please go back through the installation and verify the IP address and network connection.

### 3.2 Detailed Preparation

It is usually best to write down all your decisions about your configuration so that you have something to refer to when needed. Appendix A contains a complete checklist and form to help you organize your configuration information and decisions made along the way.

### 3.3 Network Settings

In order to allow your phones to use DHCP, you will need to configure your DHCP server (usually your firewall) Option 150 with the IP Static address assigned to the PBX. If your DHCP server does not support option 150, then it is best to manually configure your phones.

### 3.4 Phones

This section pertains to questions 1 and 2 on the form in Appendix A.

The first step in getting ready is to know how many VoIP telephones you want to configure and what extension range to use. Many small offices that have less than 25 people use a three digit extension number series. It is very common to see an office utilize extension numbers from 100 to 124 or 25 extensions. It is not necessary to configure all the extensions you plan to use right now as extensions can be added at any time as long as you don't exceed the maximum number of extensions allowed for the Cheetah PBX you've purchased.



Remember that the total number of VoIP phones connected to your PBX can never be more than 25.

### 3.5 PSTN Trunks

This section pertains to questions 3 and 4 on the form in Appendix A.

A PSTN trunk is a connection from your telephone service provider. The Cheetah 1000 only support analog connections and SIP trunks. Each analog connection is the same as you might have at your home and is plugged into a connector in the rear of the PBX.

A SIP trunk is connected using your Ethernet network. How many simultaneous calls you can receive or place using your SIP trunk is up to you and your SIP trunk provider.



Remember that the total PSTN trunks and calls received by your SIP trunks can never be more than 8.

## 4 Configuring the PBX

There are two ways to configure the PBX:

1. Use the PBX Wizard.
2. Use the configuration detail pages.

The PBX Wizard is by far the simplest and fastest way to configure the PBX and user are encouraged to utilize this tool for all or at least a start of their configuration.

## 4.1 Logging In

To get to the PBX Wizard, you must open a browser window and type the network name or IP address of your PBX and press the Go button or the 'Enter' key on your keyboard. You will then see a login dialog like this:



The image shows a login dialog box with a title bar that says "Please log in.". Below the title bar, there are two radio buttons for "Login Type": "User" (which is unselected) and "Administrator" (which is selected). Below the radio buttons, there are two text input fields: "User ID" containing the text "admin" and "Password" containing five dots. At the bottom of the dialog is a "Log In" button.

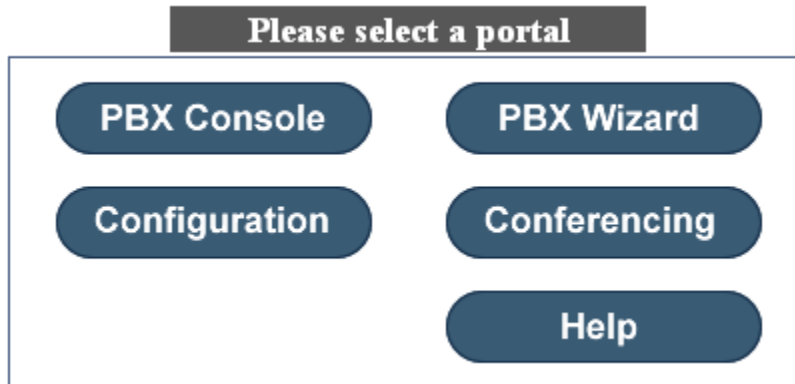
In this dialog you must click the Administrator radio button and enter the administrative credentials. The default is:

User ID: admin  
Password: mypbx

After typing the user ID and password, either click the Log In button or press the 'Enter' key on your keyboard.

## 4.2 The Administrator Portal

After you've logged in you will see the administrator's portal which looks like this:



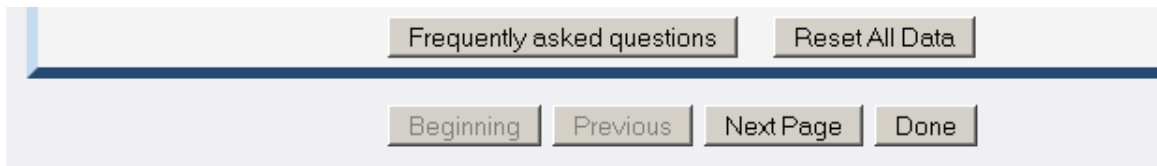
Click the button labeled PBX Wizard. You will now see a status bar that says Checking Existing Configuration. This will take a few seconds. If this is not the first time using this tool, then any existing configuration will be read in.

At the top of you web page you will now see the following:

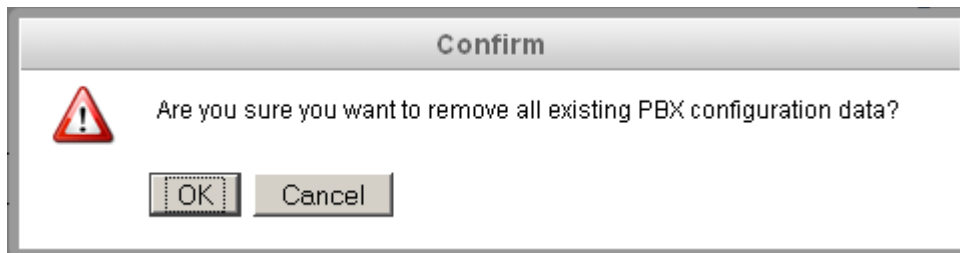


The colored buttons are the names of each section in the PBX Wizard. While you can click on any of them at any time, it is advised that if this is your first time that you only use the bottom navigation buttons.

The middle of the page will contain some basic terms and at the bottom of your page you will see:



To reset all you configuration data to its default state, press the Reset All Data button. If you press this button you will be prompted to confirm your action with the following dialog:



Pressing OK at this point will destroy any existing configuration data and is not recoverable.

The Frequently Asked Question button will pop up some often asked questions and the answers. If you discover you have a question that is not answered here, feel free to send it to us and suggest we add it to the list.

At the bottom of each page you will see the following page navigation buttons:

Button Name	Description
Beginning	This will take back to the first page regardless of what page you are on.
Previous	The will take you back to the previous section.
Next Page	This will take you to the next section.
Done	This will take you to the summary page in preparation to submitting all your data to the PBX.

If you are ready, you can press the Next Page button.

### 4.2.1 PBX Defaults

You will now see the following questions:

**PBX Defaults**

This step defines the defaults used in your PBX.

Number of digits in extensions  ?

Music On Hold File  ?

Operator Extension  ?

Log all inbound calls  ?

Log all outbound calls  ?

**SMTP Settings**

Enable Email  ?

SMTP Server  ?

Email Account  ?

Email User ID  ?


Email Password  ?

On this page answer the following questions:

**Q:** Number of digits in extensions

**A:** This will default to 3 but you can choose 2, 3, or 4. If you want your first (lowest) extension number to be 500, your selection would be 3. If you wanted to use 5000, your answer should be 4, etc.

**Q:** Music On Hold File

**A:** Select one of the music on hold names. To preview a selection, press the green speaker  button.

**Q:** Operator Extension

**A:** Enter the extension that will be your attendant or operator.

**Q:** Log all inbound calls

**A:** If you want all inbound calls logged, then check this item.

**Q:** Log all outbound calls

**A:** you want all outbound (dialed) calls logged, then check this item.

**Q:** Enable email

**A:** If you plan on having any user's voicemail messages sent to their email, then you should check this item and fill in the next 4 questions.

**Q:** SMTP Server

**A:** The network name, DNS name, or IP address of your mail server. This would typically be the same as you use in Outlook, Eudora, or any desktop email client.

**Q:** Email Account

**A:** This is the email address of the account you wish to use to send emails. You may consider creating a special one just for this purpose.

**Q:** Email User ID

**A:** This is the login ID used to log into this email account when sending email. If you do not have authentication turned on you can skip this step though it is highly recommended that you always use authentication.

**Q:** Email Password

**A:** This is the password used to log into this email account when sending email. If you do not have authentication turned on you can skip this step.

When finished, press the Next Page button.

## 4.2.2 Spoken Languages

You will now see the following questions:

**Spoken Languages**

This step defines the primary and optional secondary language spoken by your callers.

Primary Spoken Language  

Secondary Spoken Language  

On this page answer the following questions:

**Q:** Primary Spoken Language

**A:** This should be the default language all your audio prompts are recorded in. By default, this is English..

**Q:** Secondary Spoken Language


**A:** If you will have a second language recorded, then enter it here..


The language(s) selected here will determine what your callers will be allowed to select.

When finished, press the Next Page button.

## 4.2.3 Extensions

You will now see the following questions:

First Extension Number  

Number of Phones  

On this page answer the following questions:

**Q:** First Extension Number

**A:** This can be any number that matches that length you specified on the Defaults page. For example, 500, 5000, etc.

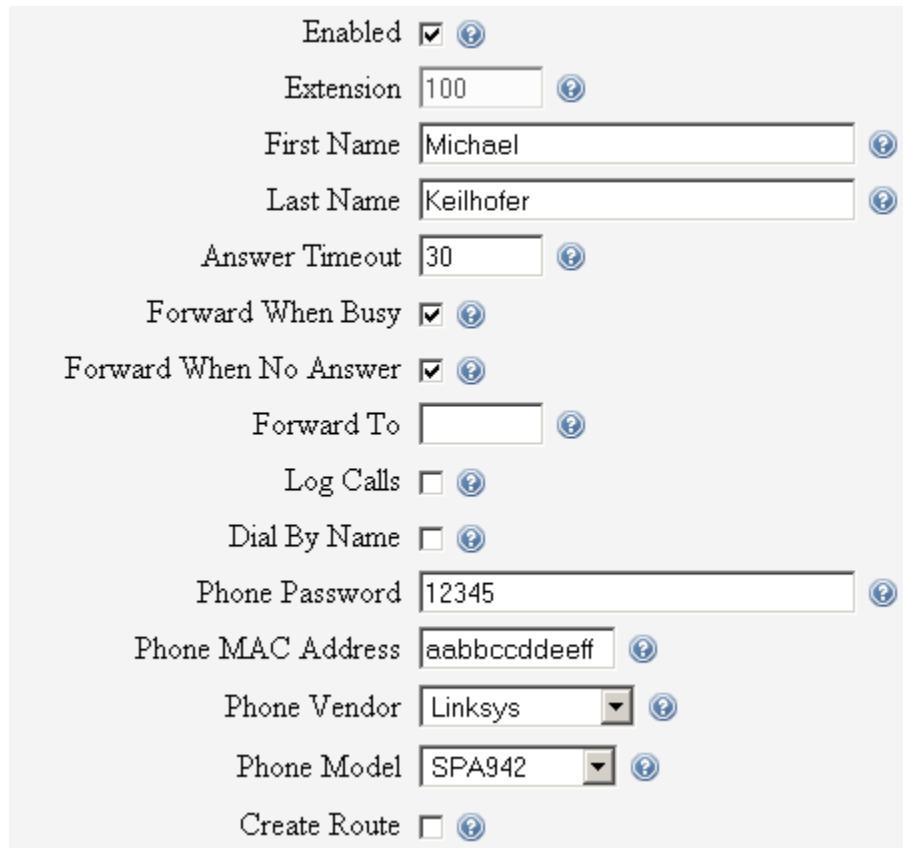
**Q:** Number of Phones

**A:** This is the number of extensions you wish to configure at this time. This should be a number that is the total of the Appendix A questions 1 and 2. Keep in mind that you can change this number at any time. If you choose to define a number larger than the number of phones you have then those extensions can be disabled until later.

When finished, press the Next Page button.

## 4.2.4 Extension Definitions

You will now see the following questions for each extension:



The screenshot shows a configuration form for an extension. The fields and their values are: Enabled (checked), Extension (100), First Name (Michael), Last Name (Keilhofer), Answer Timeout (30), Forward When Busy (checked), Forward When No Answer (checked), Forward To (empty), Log Calls (unchecked), Dial By Name (unchecked), Phone Password (12345), Phone MAC Address (aabbccddeeff), Phone Vendor (Linksys), Phone Model (SPA942), and Create Route (unchecked). Each field has a help icon to its right.

On this page answer the following questions for each extension:

**Q:** Enabled

**A:** If this extension will be used now, check this. Otherwise, Uncheck it.

**Q:** Extension

**A:** This will be filled in for you and serves as a reference only.

**Q:** First Name

**A:** The first name of the user that will use this extension.

**Q:** Last Name

**A:** The last name of the user that will use this extension.

**Q: Answer Timeout**

**A:** The number of seconds that this extension will be allowed to ring before considering it not answered. Enter zero (0) to disable this timeout. i.e., Zero means it is never considered not answered.

**Q: Forward When Busy**

**A:** Check this if you want calls sent somewhere else when this extension is busy.

**Q: Forward When No Answer**

**A:** Check this if you specified a number greater than zero for Answer Timeout and you want calls sent somewhere else when a call not answered.

**Q: Forward To**

**A:** Enter the telephone number of extension where calls should be sent that are forwarded because of an answer timeout or busy.

**Q: Log Calls**

**A:** Check this if you want all inbound and outbound calls logged for this extension.

**Q: Dial By Name**

**A:** Check this if you want this extension accessible when callers use dial-by-name.

**Q: Phone Password**

**A:** This is the authentication password the phone will send when registering.

**Q: Phone Vendor**

**A:** This is the manufacturer of the phone that will use this extension.

**Q: Phone Model**

**A:** This is the phone model.

**Q: Create Route**

**A:** Check this if calls will be sent to this phone from a menu.

When finished, press the Next Page button.

## 4.2.5 Voice Mail

You will now see the following questions:

Number VoiceMail Boxes  ?

On this page answer the following question:

**Q:** Number Voice Mail Boxes

**A:** Enter the number you entered into #3 in Appendix A.

When finished, press the Next Page button.

## 4.2.6 Voice Mail Definitions

You will now see the following questions:

Enabled  ?

VoiceMail ID  ?

Password  ?

First Name  ?

Last Name  ?

Forward Messages To Email  ?

Forward To Email Address  ?

Include VoiceMail Message  ?

Max Days Messages Can Exist  ?

Create Route  ?

On this page answer the following questions for each Voice Mail box:

**Q:** Enabled

**A:** If this Voice Mail box will be used now, check this. Otherwise, Uncheck it.

**Q:** Voice Mail ID

**A:** This will be filled in for you up to the number of extensions. After that, you may number the Voice Mail boxes as you chose staying within the range of extensions being used. i.e., If your extension start with 500, then you can number your Voice Mail boxes from 500 through 599.

**Q:** First Name

**A:** The first name of the user that will use this extension. If this Voice Mail box is the same as an extension, then the first name should be filled in for you.

**Q:** Last Name

**A:** The last name of the user that will use this extension. If this Voice Mail box is the same as an extension, then the last name should be filled in for you.

**Q:** Forward Messages To Email

**A:** Check this is you want your Voice Mail messages sent to your email.

**Q:** Forward To Email Address

**A:** If you checked . "Forward Messages To Email" then enter your email address.

**Q:** Include Voice Mail Message

**A:** Check this is you want your Voice Mail messages included in the message sent to your email. If this is not checked, the email will serve as a notification but not include an audio file of the actual message that was left.

**Q:** Max Days Messages Can Exist

**A:** Messages will be automatically removed after this number of days whether they have been heard or not. To leave message on the system forever, enter zero (0).


**Q:** Create Route

**A:** Check this if you want to send caller to this Voice Mail box from the main menu.

When finished, press the Next Page button.

## 4.2.7 Hunt Groups

You will now see the following question:

Number of Hunt Groups  

On this page answer the following question:

**Q:** Number of Hunt Groups

**A:** Enter the number of desired Hunt Groups from Appendix A #10.

When finished, press the Next Page button.

## 4.2.8 Hunt Group Definitions

You will now see the following questions for each Hunt Group:

The screenshot shows a web form for defining a Hunt Group. The fields and their values are: Enabled (checked), Name (sales), Description (empty), Hunt Type (Fewest Calls), Extension Ring Time (15 seconds), Overflow After (1 minute), Overflow To (HG - sales), Assigned Extensions (100 (Michael Keilhofer), 101 (Brigid O'Conner)), Music On Hold File (Dispersion Relation), VoiceMail Box (empty), and Create Route (checked). Each field has a help icon (question mark in a circle) to its right.

On this page answer the following questions for each Hunt Group:

**Q:** Enabled

**A:** Check this if you want to use the Hunt Group now.

**Q:** Name

**A:** Enter a name for this Hunt Group such as Sales, Support, Billing, Customer Service, etc.

**Q:** Description

**A:** Enter a description for this Hunt Group.

**Q:** Hunt Type

**A:** Select the type of hunting you want. The hunt types are:

Fewest Calls – the extension that has answered the fewest number of calls today will receive the next call.

From First – extensions will be called in the order they are listed as members of this Hunt Group.

Longest Idle – the extension with the longest time since last hanging up will receive the next call.

Round Robin – the extension to receive the next call will be the one after the extension that received the last call as assigned in the Hunt Group members list.

**Q:** Extension Ring Time

**A:** The number of seconds each extension in the member list will ring before trying the next extension.



**Q:** Overflow After

**A:** Select the amount of elapsed time that calls can remain waiting to be answered before being sent somewhere else. This action is called overflow.


**Q:** Overflow To

**A:** Select the Route where calls that overflow should be sent.

**Q:** Assigned Extensions

**A:** The left panel shows all enabled extensions. To assign an extension to this Hunt Group, select one in the left panel and press the  button. DO this for each extension that should be part of this Hunt Group. To remove an extension from this Hunt Group, select the extension in the left panel and press the  button.

**Q:** Music On Hold File

**A:** Select one of the music on hold names. To preview a selection, press the green speaker  button

**Q:** Voice Mail Box

**A:** Select the Voice Mail box where calls should go if not answered.

**Q:** Create Route

**A:** Check this is calls will be sent to this phone from a menu

When finished, press the Next Page button.

## 4.2.9 Ring Groups

You will now see the following question:

Number of Ring Groups  ?

On this page answer the following question:

**Q:** Number of Ring Groups

**A:** Enter the number of desired Ring Groups from Appendix A #11.

When finished, press the Next Page button.

## 4.2.10 Ring Group Definitions

You will now see the following questions for each Ring Group:

Enabled  ?

Name  ?

Description  ?

Overflow After  ?

Overflow To  ?

Assigned Extensions  ?

Music On Hold File  ?

VoiceMail Box  ?

Create Route  ?

On this page answer the following questions for each Ring Group:

**Q:** Enabled

**A:** Check this if you want to use the Ring Group now.

**Q:** Name

**A:** Enter a name for this Ring Group such as Sales, Support, Billing, Customer Service, etc.

**Q:** Description

**A:** Enter a description for this Ring Group.

**Q:** Overflow After

**A:** Select the amount of elapsed time that calls can remain waiting to be answered before being sent somewhere else. This action is called overflow.


**Q:** Overflow To

**A:** Select the Route where calls that overflow should be sent.

**Q:** Assigned Extensions

**A:** Select the extensions from the list you want to belong to this Ring Group. To select more than one, press the Control Key and left click to toggle an extension on or off.

**Q:** Music On Hold File

**A:** Select one of the music on hold names. To preview a selection, press the green speaker  button

**Q:** Voice Mail Box

**A:** Select the Voice Mail box where calls should go if not answered.

**Q:** Create Route

**A:** Check this is calls will be sent to this phone from a menu

When finished, press the Next Page button.

### 4.2.11 Work Groups

You will now see the following question:

Number of Work Groups  

On this page answer the following question:

**Q:** Number of Work Groups

**A:** Enter the number of desired Work Groups from Appendix A #6.

When finished, press the Next Page button.

### 4.2.12 Work Group Definitions

You will now see the following questions for each Work Group:

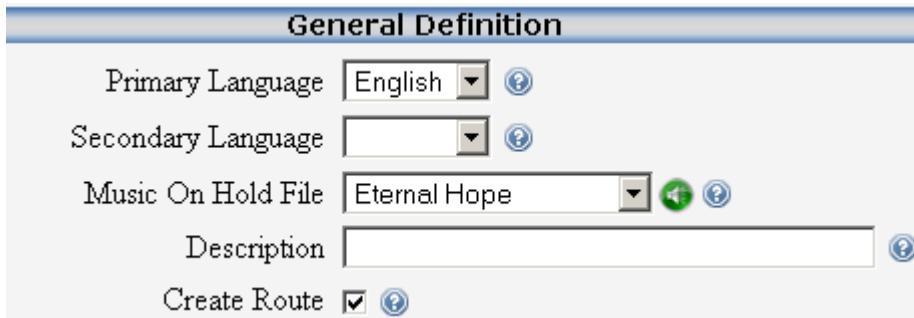
On this page, each blue title bar will open up to questions when clicked. The image above shows the default view as if the General Definition blue bar had been clicked.

### 4.2.12.1 Work Group Name


Name  


The Work Group name will always show at the top of each section. Enter the name you want for this Work Group.



### 4.2.12.2 General Definition





**General Definition**

Primary Language  

Secondary Language  

Music On Hold File   

Description  

Create Route  

On this page answer the following questions for each Work Group definition:


**Q:** Primary Language

**A:** This should be the default language all your audio prompts are recorded in. By default, this is English..

**Q:** Secondary Language

**A:** If you will have a second language recorded, then enter it here..

**Q:** Music On Hold File

**A:** Select one of the music on hold names. To preview a selection, press the green speaker  button.

**Q:** Description

**A:** Enter a description of this Work Group.

**Q:** Create Route

**A:** Check this is calls will be sent to this phone from a menu.

### 4.2.12.3 Normal Hours Schedule

Normal Hours Schedule							
Week					Dual		
Day	Use	Start Time	End Time		Period	Start Time	End Time
Sunday	<input type="checkbox"/>	Midnight	Midnight		<input type="checkbox"/>	Midnight	Midnight
Monday	<input checked="" type="checkbox"/>	09:00 am	01:00 pm		<input checked="" type="checkbox"/>	02:00 pm	06:00 pm
Tuesday	<input checked="" type="checkbox"/>	09:00 am	05:00 pm		<input type="checkbox"/>	Midnight	Midnight
Wednesday	<input checked="" type="checkbox"/>	09:00 am	05:00 pm		<input type="checkbox"/>	Midnight	Midnight
Thursday	<input checked="" type="checkbox"/>	09:00 am	05:00 pm		<input type="checkbox"/>	Midnight	Midnight
Friday	<input checked="" type="checkbox"/>	09:00 am	05:00 pm		<input type="checkbox"/>	Midnight	Midnight
Saturday	<input type="checkbox"/>	Midnight	Midnight		<input type="checkbox"/>	Midnight	Midnight

On this page answer the following questions for each Work Group definition. You will see the seven days of the week listed with the following questions for each day:

**Q:** Use

**A:** Check this is this day is a day that your business is considered open.

**Q:** Start Time

**A:** Enter the time your business is first open.

**Q:** End Time

**A:** Enter the time when your business is no longer considered open.

**Q:** Dual Period

**A:** Check this is you have two time periods you are open with a time in the middle when you are not. As an example, if you are not open during lunch, check this box.

**Q:** Start Time

**A:** Enter the time your business is open for the second time.

**Q:** End Time

**A:** Enter the time when your business is no longer considered open for the second time.

### 4.2.12.4 Normal Hours Main Menu Definition

**Normal Hours Main Menu Definition**

Initial Greeting  ⓘ

Say Zero Last  ⓘ

Max Retries  ⓘ

Digit	Valid	Prompt	Action	Parameter
1	<input checked="" type="checkbox"/>	<input type="text" value="AA_DialExtensionNow"/>	<input type="text" value="Send to a Route"/>	<input type="text" value="Select a Route"/>
2	<input checked="" type="checkbox"/>	<input type="text" value="undefined"/>	<input type="text" value="Dial By Name"/>	<input type="text"/>
3	<input checked="" type="checkbox"/>	<input type="text" value="undefined"/>	<input type="text" value="Dial By Name"/>	<input type="text"/>
4	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="Dial By Name"/>	<input type="text"/>
5	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="Dial By Name"/>	<input type="text"/>
6	<input checked="" type="checkbox"/>	<input type="text" value="undefined"/>	<input type="text" value="Dial By Name"/>	<input type="text"/>
7	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="Dial By Name"/>	<input type="text"/>
8	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="Dial By Name"/>	<input type="text"/>
9	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="Dial By Name"/>	<input type="text"/>
0	<input checked="" type="checkbox"/>	<input type="text" value="undefined"/>	<input type="text" value="Dial By Name"/>	<input type="text"/>
Star	<input type="checkbox"/>	<input type="text" value="undefined"/>	<input type="text" value="Dial By Name"/>	<input type="text"/>

On this page answer the following questions for each Work Group definition:

**Q:** Initial Greeting

**A:** Enter the name of the audio file that should be played as a welcome message. Leave this blank if you do not want any initial audio message played.

**Q:** Say Zero Last

**A:** If you want to use zero as a menu option and want it played last instead of first, then check this box.

**Q:** Max Retries

**A:** The number of retries refers to the number of times a caller can listen to the menu and either not enter anything or enter an invalid digit and repeat these steps. There is a system defined number of retries that by default is set to 3. If you wanted, for example, to only allow callers one attempt at entering a valid digit, you would enter 1.

You will next see a line for each button on a telephone pad except #. Answer the following questions for each one:

**Q:** Valid

**A:** Check this if the Digits to be considered valid.

**Q:** Prompt

**A:** Enter the name of the audio file that should be played for this Digit.

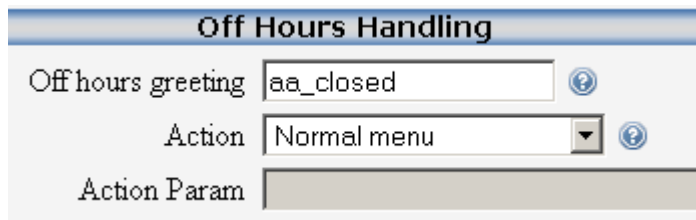
**Q:** Action

**A:** Select the action to take if the caller presses this Digit.

**Q:** Parameter

**A:** If the selected action is Dial By Name then no parameter is used. If the selected action is Play an Audio Message then the parameter is the name of the audio message. If the selected action is Send to a Route then select the Route.

#### 4.2.12.5 Off Hours Handling



Off Hours Handling	
Off hours greeting	<input type="text" value="aa_closed"/> ?
Action	<input type="text" value="Normal menu"/> ?
Action Param	<input type="text"/>

On this page answer the following questions for each Work Group definition:

**Q:** Off hours greeting

**A:** Enter the name of the audio file that should be played as a welcome message when not during normal working hours. Leave this blank if you do not want any initial audio message played.

**Q:** Action

**A:** Select the action to take after playing the audio message.

**Q:** Action Parameter

**A:** If the selected action is Normal Menu then no parameter is used. If the selected action is Play Message or Play Message, hang up then the parameter is the name of the audio message. If the selected action is Send to a Route then select the Route.

When finished, press the Next Page button.

### 4.2.13 Summary

When you are on Work Groups and press Next Page or you press the Done button at any time you will see a summary of your configuration. If any errors exist you will see the following:

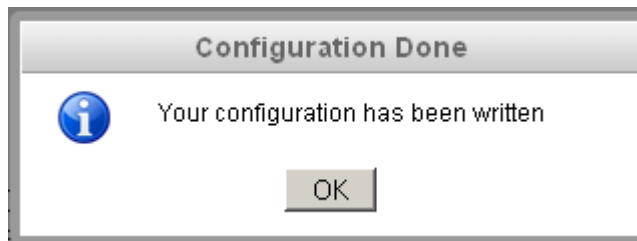


Press the OK button and look for errors shown in red color text. Go back to the appropriate pages, correct the errors and press the Done button again. You will not be able to commit your configuration until all errors have been resolved.

A typical example of an error might be that you specified more Voice Mail boxes than extension. These Voice Mail boxes are enabled by default but do not have any first or last name. The error would look like this:

Voice Mail ID:  
Password: 54321  
**Message Box First Name: is undefined**  
Message Box Last Name:  
Messages will be deleted after 60 days

Once all errors have been resolved you will see a summary page. Review that page. If everything looks correct, then press the Commit button. YOU will then see another dialog with the title Updating Configuration. When finished you will get a confirmation dialog that looks like this:



Click the OK button.

If you have entered phone information (MAC address, vendor, model, etc.) you should now reset your phone. This will allow each phone to acquire a DHCP IP address which will inform them of the IP address of their PBX. Each phone will then retrieve their configuration form the PBX.

You are now finished and can start sending calls to your PBX.

### 4.3 PSTN Trunk Configuration

If you have PSTN trunks you can configure the associated dialed number by using the Configuration web portal. Click the PBX bar and click the PSTN Ports menu. For more information consult the Web Configuration Portal users manual.

### 4.4 Appendix A

The following form can be used to help plan your configuration:

#	Item	Answer	Help
1	Number of phones you plan to connect now		This should be a number between 1 and 25
2	Number of phones you plan to connect in the future		This should be a number between 0 and 24
3	Number of Voice Mail boxes		This should be the number of extensions plus any additional Voice Mail boxes you want
4	Number of PSTN trunks you plan to connect no		This should be a number between 0 and
5	Number of SIP trunks you plan to have send calls to the PBX		This should be a number between 0 and 8
6	Number of Work Groups		Example: A different Work Group could be defined for sales, billing, warehouse, or any logical group of extensions that work together. Enter the Work Group names
7	Your main greeting when a new call arrives		This should be something like "Welcome to Lenny's Pizza Parlor." Even if you don't know exactly what you want to say, pick a name for the audio file
8	Do you want callers to be able to use dial-by-name?		Enter "yes" if you want to allow a caller to enter the first 3 letters of the called person's last or first name and hear a list of potential extensions
9	Do you want to allow callers to press a digit, usually zero, to get		While not necessary, most callers will be annoyed if you

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	connected to an attendant, secretary, or other person that can provide general assistance in routing the call		don't give them the option to press zero or some other digit to get a live person to them
10	How many hunt groups do you want?		A hunt group will ring one extension at a time until answered to find someone to answer an inbound call. Examples of common hunt groups are for billing, sales, and customer service A hunt group can have from one to all of you extensions as members
11	How many ring groups do you want?		A ring group will ring all extensions at the same time until answered to find someone to answer an inbound call. Examples of common hunt groups are for billing, sales, and customer service A hunt group can have from one to all of you extensions as members
12	Do you want voice mail messages forwarded to user's email?		Some people want to listen to their voicemail even when not in the office. If you have any extensions that will utilize this feature, then you will need to acquire the details for an email account that can be used to send the voicemail messages to email
13	Do you have any work groups that will need more than one level of main menu or need to communicate with one of your databases?		If you have a need to multiple levels of menus or need to provide information to callers that comes from one of your databases, you will need to write an IVR script. This can be complex and should only be done by trained personnel
14	Do you have your VoIP phones?		The PBX will configure your phones for you but you will need to enter each phone's MAC address.

# Evaluation

We hope you found this document useful, and easy to use. To help us provide you with the best documentation possible, we would like to get your feedback on this document. Please complete this form and use one of the following methods to return it to us:

- mail it to Telegato LLC  
801 East Campbell Road  
Suite 190  
Richardson, TX 75081
- fax it to (214) 853-5710
- email: support@telegato.com

Please check Yes or No.

- Is this manual technically accurate? Yes  No   
If no, please explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Is information missing? Yes  No   
If yes, please explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Are the organization and layout clear? Yes  No   
If no, please explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Is information easy to find? Yes  No   
If no, please explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- How could we improve this document? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_  
Email: \_\_\_\_\_ Phone: \_\_\_\_\_



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