PERFECT PBX
User Training Guide

➡ Voice and Data Experts

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Since 1995

Communications Simplified® **FORE**THOUGHT.net

Quick Tips

Manage your Voice Mail Online

Just login to perfectpbx.forethought.net. Your user name is your account number + ext (if applicable) and your password is your extension.

How To Set Up Call Forwarding / Find Me Follow Me

Login to your account. Go to voicemail settings and specify up to 5 different number. You will never miss a call if you don't want to.

Reviewing Messages

Did you know that you can manage your voice mail via email? Simply check "Notify by email" in the voice mail settings. You can now get your voice mail anytime anywhere.

Call History Information

Login to your account and click call history to find all the calls you made as well as the calls to your extension. You can even sort records by clicking on the header.

Call Screening / Blocking

Want to screen or block your calls? It is easy with PerfectPBX. Simply login to your account click either call screening or blocking and add the numbers you want to avoid. Introduction to Perfect PBX

Thank You

for choosing FORETHOUGHT.net PerfectPBX. We know you are going to enjoy the 100% guaranteed landline quality along with over 20 productivity-enhancing features you can access anywhere anytime at perfectpbx.forethought.net.

The following pages will be a useful reference guide to set up your new system. If you need additional help, please contact us and we will gladly walk you through it.

Thanks again,

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In This **Guide**

Introduction to Perfect PBX

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Hosted PBX

A hosted PBX is a business communications web service, delivered over a data connection. This is a unique web service with no PBX hardware to manage at the customer end. Instead, the PBX service is managed on a single platform at the vendor location..

User Portal

The Perfect PBX user portal enables users to manage features on their own extension. Users are able to enable and disable these features as well as make configuration changes.

Access to web Portal

One of the biggest advantages of our hosted PBX platform is the ability for users to access their features from anywhere. As long as you have access to the internet, you can access the web portal to make changes to your extension.

Login
Information

Login URL

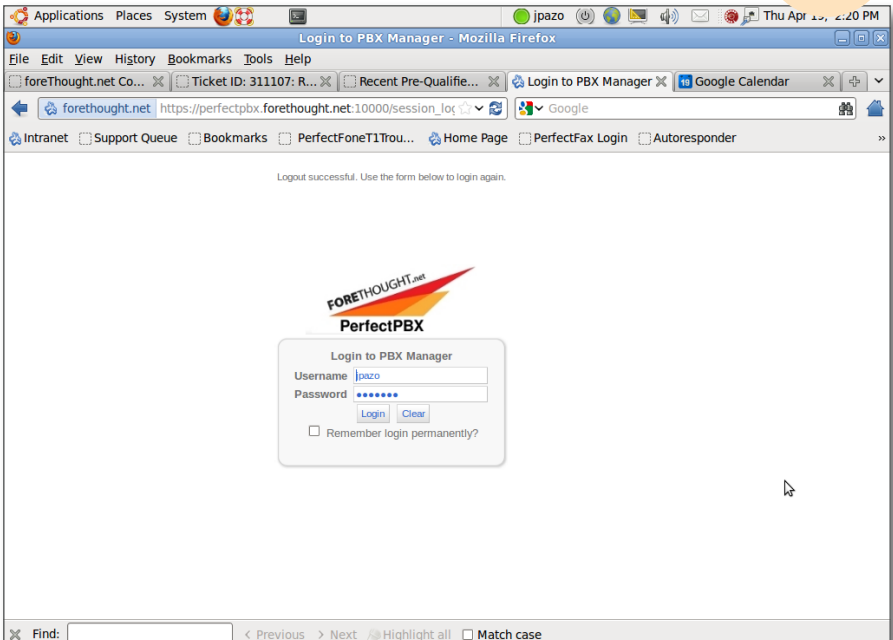http://perfectpbx.forethought.net

Username/Password

Example:
Username:
xxxxxx-101 (your account number – your phone extension)
Passwords: 101 (your phone extension)

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User Feature List

Voicemail Settings
Gives you the ability to set your preferences for handling voice mail calls.

Call Forwarding
Allows you to configure call forwarding rules

Call Screening
Allows you to configure the rules for screening inbound calls.

Call Blocking
Allows you to block calls from certain numbers and specify what to do when the caller ID is not known.

Call Recording
Allows you to set rules for call forwarding.

Contact & Directory
Allows you to make calls by selecting phone numbers from the company directory and create and manage your own personal contacts.

Voice Mail
Gives you the ability to access and manage voice mail messages

Recorded Calls
Allows you to access and manage recorded calls.

Call History
Gives the ability to view all the calls to and from your extension

Preferences
Allows you to modify and change your personal settings an web interface preferences

Voicemail Settings

PIN. Personal identification number for accessing voicemail.

Notify by email. Check this if you would like to be notified about new voicemail messages via email.

Email address. Your email address.

Attach messages to email. Check this if you would like the voicemail message to be sent to your email address you provided.

Delete after delivery. Check this if you would like voicemail messages to be deleted after they are delivered to your email.

Notify by pager. Check this if you would like to be notified about new voicemail messages via pager.

Pager. Pager address.
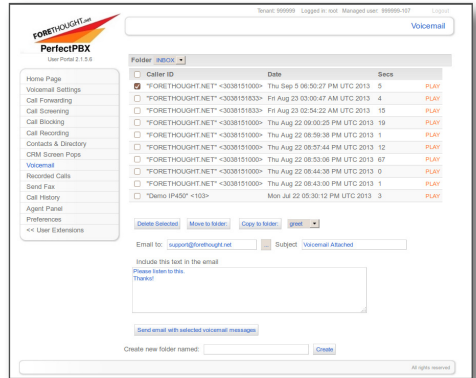
Call Forwarding

This section allows you to specify call forwarding rules and enable call forwarding.

Voicemail. Specify whether incoming calls should forward to voicemail and how long the phone should ring before being sent to voicemail.

Call forwarding always. Allows you to forward all incoming calls to a different phone number. Note that if this is enabled, it will take precedence over Find me / Follow me.

Call forwarding busy. Allows you to forward all incoming calls to a different phone number if your phone is busy. Use this when you would rather have the call sent to another number instead of going to voicemail.

Find me / Follow me. Allows you to forward your incoming calls to different phone numbers. You can specify up to 5 different numbers which can be dialed simultaneously or sequentially. You can enable the feature for all incoming calls, or only from specific numbers.
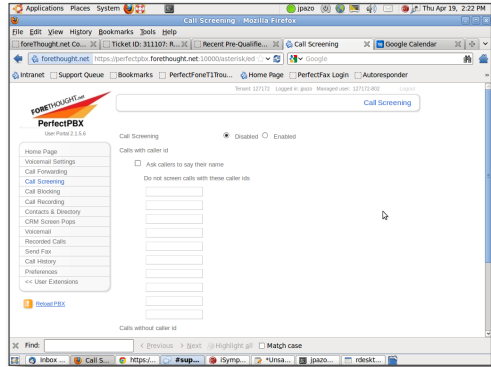
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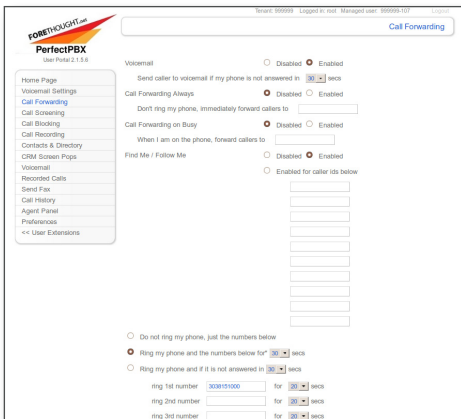
Call Screening

This screen allows you to specify call screening rules and enable call screening.

You can specify call screening options for calls with or without a caller ID. For calls with caller ID, you can request the callers to announce themselves. You can also enter a list of caller ID's for the callers you would like to exclude from screening.

For calls without caller ID, you can request that the callers announce themselves and/or enter their caller ID. Note that you can enter the information once, and then enable/disable the screening as needed.

Call Blocking

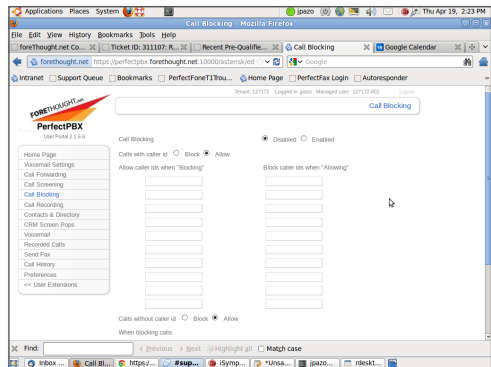This screen allows you to specify call blocking rules and enable call blocking

You can specify call blocking options for calls with or without a caller ID.
For calls with caller ID, the option are "block" or "allow"

If you are blocking calls, you can enter the caller ID's of callers to be excluded from blocking.

If you are not blocking calls, you can enter the caller ID's of callers that you want to block.

You can specify how the blocked calls are to be handled by choosing for the list of "when blocking calls" options.

Note that can enter the information once and then enable/disable the blocking as needed.

Call Recording

This screen (if enabled) allows you to specify whether the calls to and from your extension will be recorded.

The options are to record all calls, not record calls, or record calls selectively by pressing a key sequence. By default the key sequence is #9.

Recorded calls stay on the system for 30 days. You can download recorded calls to save your important recordings for longer.
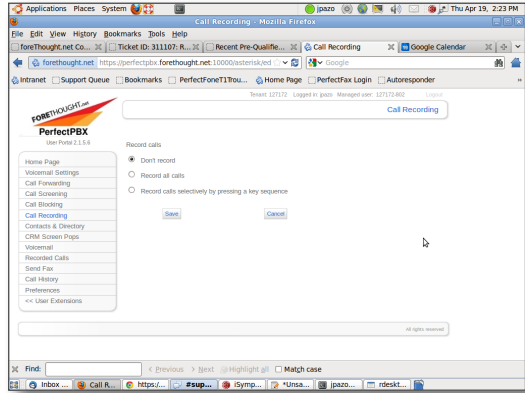
Voicemail

This screen allows you to manage your voice mail messages.

To listen to a voicemail message, click PLAY, and the message will be downloaded and played (providing you have appropriate player software on your PC).

To delete a voicemail message, select it using the check box on the left and click on Delete Selected.

Voicemail messages can be organized into folders. To create a new folder, you can enter its name and click Create button. To move or copy messages to a folder, select it using the check box on the left, select target folder from the top drop down menu list and click on either move or copy to folder button.

You can send your messages to other people via email. Simply select the desired messages by clicking the check box next to the message, enter the email address in the "email to" field, and subject (optional), click the send email button.

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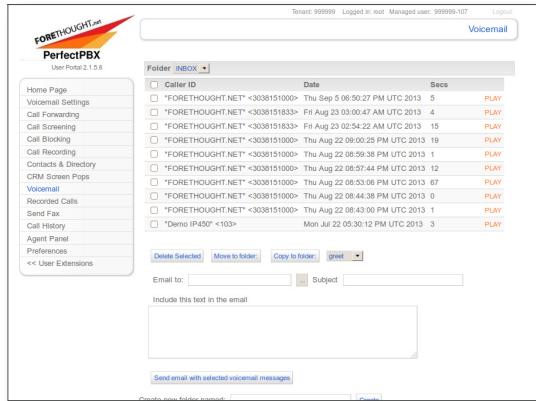
Recorded Calls

This screen (if enabled) allows you to manage your recorded calls.

To listen to a recorded call, click on PLAY (provided you have appropriate
player software on your PC).

To delete a recorded call, select it using the check box on the left and click on Delete Selected.

You can also forward your recorded calls to other people via email. Simply select the recorded calls by clicking the check box next to the message, enter the email address in the "email to" field, and subject (optional), click the send email button.
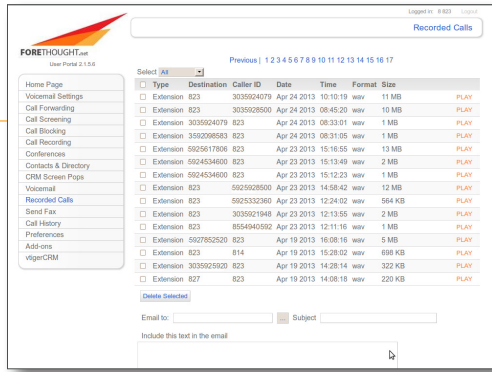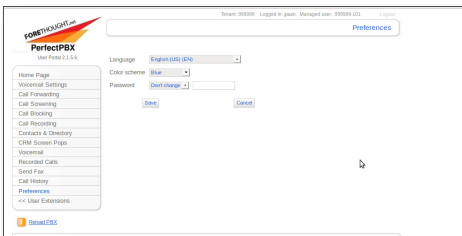
Call History

This screen shows you the calls you made as well as the calls to your extension.

You can specify a selection filter to be applied. You can filter by a range of dates, caller ID, and source and destination.
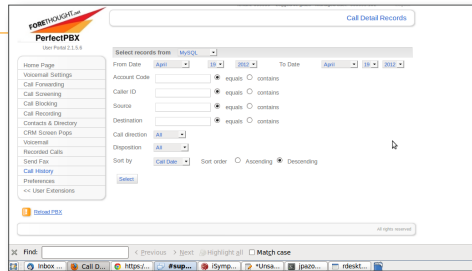
You can sort records by clicking on the headers of any column; clicking on the same header again reverses the sort order.

Preferences

This Language. Your preferred language for the User Portal web interface.

Color Scheme. Your preferred color scheme for the User Portal web interface.

Password. Your password for accessing the User Portal web interface.

Polycom Quick
Reference Guide

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Getting familiar with Polycom

Setting up voicemail

Checking voicemail

Placing a call on hold

YOUR EXTENSION

SOFT BUTTONS

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Getting Familiar with the Polycom

The Soft Button Concept: Your phone has Soft Buttons (noted in picture). These buttons change depending on whether you are idle or on a call.

Idle:

New Call: Press to initiate a new call (or pickup receiver and dial)

DirPckUp: Directed Call Pickup – This button is to answer a call that's ringing another extension.

Intercom: Direct to extension's speaker phone. 2 way communication

More: Loads next menu of soft buttons available

Buddies: Shows if other extensions are on the phone (Buddies list must be manually created)

Page All: Pages all extension's speaker phone. One way communication

Unpark: Unpark's call that has been parked by another extension

In Call:

Hold/Resume: Places call on hold, other party will hear Music On Hold. Resume to rejoin call

End Call: Hangs up call

Transfer: Allows you to ask another extension if they'd like to take a call, then transfer

More: loads next menu of soft buttons

Confrnc: Allows you to 3-way conference 2 calls with "Join" button

Record: Press at any time during call to begin recording

Xfer2VM: Transfer call direct to another extension's voicemail

BlindXfer: Transfer call direct to another extension (without asking if they'd like to take call)

Park: Park call to be picked up at another extension

Setting up Voicemail

Start by logging in to your Voicemail and recording your unavailable greeting and name.

Press the "Messages" button on your phone,

Log in with your password (default is same as extension) followed by the pound key when prompted

Press "0" for advanced options

Press "1" to record your Unavailable Message (default greeting, used for busy if no busy greeting is recorded)

Press "3" to record your Name (as will be played in directory)

Optionally, Press "2" to record a unique busy message for when you are currently on the phone.

Checking Voicemail

Press "Messages" button on the phone and enter password when prompted

Placing a call on hold

When on a call, press the "hold" button, click "Resume" to return to call

If multiple calls are on hold, use arrow to select which call to resume

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About FORETHOUGHT.net

FORETHOUGHT.net is a leading locally owned and operated IT and communications service provider, offering a portfolio of enterprise-level cloud-computing, Internet, voice and data solutions so you can focus on your business, not your technology. Established in 1995, FORETHOUGHT.net provides superior high-performance technology, scalable services and world-class support at a fraction of the expense of traditional models. This commitment to the highest level of technical expertise, security, reliability and responsiveness results in high client loyalty and satisfaction.

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