



## Net-PBX User Interface Guide

Revision 1.1 for Net-PBX version 2.1

For latest version please go to [www.net-voice.net/documentation.php](http://www.net-voice.net/documentation.php)

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# Index

<b>1.</b>	<b>Overview .....</b>	<b>1</b>
1.1.	Log In .....	1
1.2.	Web Interface .....	1
<b>2.</b>	<b>Basic Functions .....</b>	<b>3</b>
2.1.	Header .....	3
2.2.	Status .....	3
2.3.	Logging Off .....	3
<b>3.</b>	<b>Call Status.....</b>	<b>4</b>
3.1.	Call Options.....	4
3.2.	Incoming Call .....	4
3.3.	Making a Call.....	5
3.4.	Call Park .....	5
3.5.	Call Hold .....	5
3.6.	Remove Call State .....	5
3.7.	Transfer to Voicemail .....	6
3.8.	Blind Transfer.....	6
3.9.	Consultative Transfer .....	6
3.10.	Multiple Calls.....	7
<b>4.</b>	<b>Favourites .....</b>	<b>8</b>
4.1.	Status .....	8
4.2.	Ring Back When Free.....	9
4.3.	Favourites Extended Menu .....	9
4.4.	Indicators.....	10
4.4.1.	Missed Calls.....	10
4.4.2.	Voicemail.....	10
4.4.3.	New Message .....	10
4.5.	Calling .....	10
<b>5.</b>	<b>Configuration .....</b>	<b>11</b>
5.1.	Addresses .....	11
5.2.	History.....	12
5.2.1.	Missed Calls .....	12
5.2.2.	Voicemail.....	13
5.2.3.	Messages .....	13
5.3.	Settings .....	14
5.3.1.	Favourites .....	15
5.3.2.	Forward Rules.....	15
5.3.3.	Do Not Disturb.....	16
5.3.4.	Out Of Office .....	16
5.3.5.	Login / Logout Options .....	17
5.3.6.	View Options .....	17

5.3.7. Voicemail Options .....	18
5.3.8. Screen Settings.....	19
5.4. Conferencing.....	19

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# 1. Overview

This document describes the functionality of the Net-PBX User Interface.

Each section deals with the purpose, functionality and usage of an area of the User Interface. Screen shots of important web pages are shown but it is recommended that you read this document while the Net-PBX User interface is available and open in front of you.

You will be shown how to access the Net-PBX User Interface during your introduction to the PBX; otherwise, please contact your system administrator.

## 1.1. Log In

Open a web browser and enter the address of the Net-PBX into the address bar. This address will be given to you by your system administrator. You will be presented with the following page:



Enter the 'Username' and 'Password' supplied to you for your account. Once you have entered your username and password click on the 'Login' Button.


From the next screen, you have the option of opening either the 'Admin Interface' or the 'User Interface'. For the purposes of this document, select the 'User Interface' option. An additional option is to have the User Interface launch automatically the next time you login. If this option is checked the 'User Interface' will pop up automatically.

**Note:** Some browsers may block pop-up windows so you will need to set your browser to allow them for the Net-PBX address.

## 1.2. Web Interface

The User Interface is a web window which shows the status of your phone, any current calls and other relevant information. The interface has four distinct areas, which are described below.



- This top section shows the user you are currently logged in as and the associated phone number: in the picture opposite, user 'peterac' is logged on with phone number '777'. Clicking the door symbol  logs you out from, and will close, the interface.
- The 'My Calls' section shows the current status of any calls associated with your phone number.
- The 'Favourites' section shows the status of users you have chosen to display here (see the 'Settings' menu).
- There is also a 'Call' feature, where you can enter the number of the person you want to contact.
- The bottom section provides access to configuration options for your interface.


## 2. Basic Functions

This section describes the functionality and usage of the top portion of the User Interface.


### 2.1. Header

In the header bar of this window you can see the IP address (or name) of the Net-PBX to which you are registered (in this case pbx.net-work.net).



Using standard Microsoft Windows functionality, you can minimise this interface by clicking on the minimise icon  in the top right corner. The interface then shows as an additional taskbar item at the bottom of your

screen.

Clicking on the  in the top corner of the window will log you off from the User Interface (UI) in the same way as clicking on the door symbol.

Clicking on the UI item in the taskbar returns the UI to full size on your screen. If a call is received while the UI is minimised then the taskbar item will flash to alert you to the incoming call. You can configure how the UI should act when a new call is received: please see [5.3.7 'View Options'](#) for details.

You can maximise the UI or specify it to run in a fixed-size window. To change the size of the window see section [5.3.9 'Screen Settings'](#).

### 2.2. Status

This section of the user interface shows the name of the user you are currently logged in as (oakhouse1) and the associated extension number (300).

### 2.3. Logging Off




Clicking the door symbol  or the  symbol will log you off the User Interface and will close the screen.

### 3. Call Status

This section shows the behaviour of the UI under different call conditions.







This example shows an active call between the person logged in and the caller 'C460IP'. The speech bubble indicates that this call is active and changes depending on the status of the call.

The call options are shown below the name of the caller. In the example shown above you can choose to 'Park'  the call, put the call on 'Hold'  or 'Delete'  the call: you may need to 'Delete' a call in exceptional circumstances – for example if a call remains displayed in the 'My Calls' section after it has ended (known as a 'stale call'), for reasons outside of the PBX's control. Clicking the 'Delete' icon will clear the display and remove the stale call. Please see [3.6 'Remove Call State'](#).

Depending on the information received about the call, the name or number will be displayed as the caller. If neither is available then 'unknown' will be displayed. If you have selected 'Do Not Disturb' or 'Out Of Office' then an icon will be displayed indicating your current status. Please see [5.3.4 'Out Of Office'](#) for details.

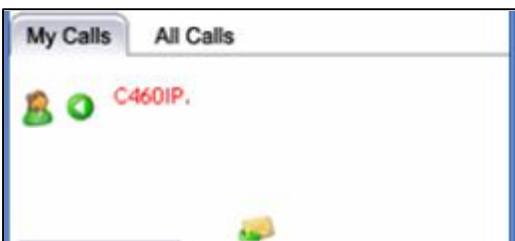
#### 3.1. Call Options

When you are in a call, as shown in the previous screenshot, you can perform the following actions by clicking on the relevant icon:


-  'Park' the call – places the call on 'Hold' so that any Net-PBX user can pick it up later
-  place the caller on 'Hold' – allows you to leave the active call and come back to it later
-  remove call- clicking on the 'Delete'  icon removes a stale call from the display

These options are described in detail below.

#### 3.2. Incoming Call

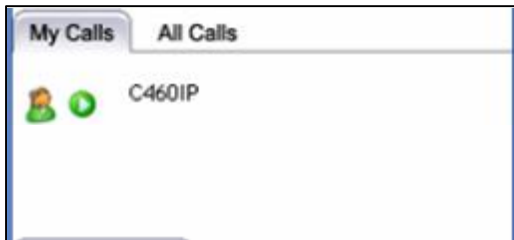


The following screen shows an incoming call from an internal extension called 'C460IP'. The direction of the green arrow (left) indicates that the call is incoming. At this point your phone or software client will be alerting you to the incoming call.



Clicking the 'mail' icon  will send this caller to Voicemail without you having to answer the call.

### 3.3. Making a Call

The following screen shows that the user has dialled the extension 'C460IP' from their phone; the call should now be ringing. As before, the direction of the green arrow (right) indicates that the call is outgoing to the user 'C460IP'.





### 3.4. Call Park


To place a call on 'Park' click on the Park symbol . You can retrieve calls placed on Park by clicking on the Park symbol  in the 'All Calls' panel of your User Interface. Parked calls can be retrieved by any user on the Net-PBX through the 'All Calls' tab. Call park lets you park a call, inform another person of the call and then let them pick it up.

While the call is parked the caller will hear the system's 'music on hold' as set by the PBX administrator. Once a call has been held its 'Slot' number will be shown and announced. This slot number allows you to retrieve the call from a handset using the key sequence \*70<slot>#.


### 3.5. Call Hold

To place a call on hold, click on the 'Hold' symbol . You can retrieve calls placed on hold by clicking on the 'Hold' symbol  in the 'My Calls' panel of your User Interface. While the caller is on hold they will hear the 'Music on Hold' as set by the PBX administrator


### 3.6. Remove Call State

The primary role of this function is to allow a user to stop the call state being displayed in the My Calls window. To do this, click on the 'Delete'  icon. The icon also allows you to remove a 'stale call'. A 'stale call' is when call details still remain displayed in your 'My Calls' window even though a call is not in progress (this can sometimes happen due to poor computer network performance).

### 3.7. Transfer to Voicemail

An incoming call can be transferred to Voicemail while it is still ringing by clicking on the Voicemail icon  in the 'My Calls' section of the User Interface. This will send the caller to your Voicemail box without you having to answer the call.

### 3.8. Blind Transfer


Blind Transfers send the call to the destination without you needing to talk to the party to whom the call is transferred. While in a call you can choose to transfer it to one of your favourites by clicking on the status icon  associated with their name. You will hear a 'busy' signal on your phone, and the caller will be transferred to the destination you selected.

Once the call has been transferred it will be treated as any other incoming call for the party you are transferring to. This may result in the call being forwarded, transferred again, or sent to Voicemail.

### 3.9. Consultative Transfer

This type of transfer allows you to speak to the party to whom you are transferring the caller: this might be to check if they want to accept the call or to relay further information about the call.

The caller will hear the 'Music on Hold' while you are talking to the party to whom the call is being transferred. Once this conversation is complete, you can 'release' this call, retrieve the original call and then proceed with the transfer.

To perform a transfer, click on the **name** of the favourite, i.e. **Airs**, that you want to transfer the call to, **not** the status icon  next to their name (which performs a blind transfer as described in [3.8 'Blind Transfer'](#)). If you want to transfer the call somewhere else, enter the phone number into the call box and click on the 'Call' button or go to 'Addresses' and the parties available to transfer to will have a 'Transfer' link next to their name. Clicking on this link will transfer the call to that party.



This screen is displayed showing that user 'peterac' is transferring the call from 'Airs'

to extension '429' and is ready to transfer the call. At this point 'Airs' is held, and the call to '429' is active.

The original call can be 'Retrieved' if you want to speak to the caller again, or 'Transferred' immediately.

For example, if you wish to speak to '429' then wait until he answers and relay the information about the call to be transferred. Once you are ready to transfer the call to '429' after speaking to him, then you can either click on 'Transfer' or hang up. This will complete the transfer and your 'My Calls' information will then clear.

### **3.10. Multiple Calls**

If your extension is set up to allow multiple incoming calls then all calls will be displayed in the call status section of your User Interface. Each call is a separate entity and can be treated independently. To switch between calls you will need to place the currently active call (ie the person you are talking to) on 'Hold' or 'Park'. You can then deal with the next call as appropriate.

## 4. Favourites











This section of the User Interface provides quick access to your most frequently called and most important contacts.

You can define which contacts appear in this area and you can include any extensions and external numbers you use frequently. For full details please see [5.3.1 'Favourites'](#).

### 4.1. Status

Each defined entry in the Favourites section has a status icon next to it. In the above example:


-  'Airs' is available.
-  'Karova' is not currently logged on to the Net-PBX, so is not available.
-  'DECT phone' is being forwarded.
-  'Peter Mobile' is an external number so the status is not known.
-  A favourite that is currently in a call is shown as forwarded.
-  A favourite that is currently in a call will have a speech bubble icon next to their name.
-  A favourite that has set 'Do Not Disturb' status for their phone will be shown with this icon.
-  A favourite that has set 'Out Of Office' status for their phone will be shown with this icon.

## 4.2. Ring Back When Free




If a contact or favourite is busy when you check their status and you want to talk to them, clicking on their **name** link, will display the screen shown here.

From this screen, full details of the extension are displayed, including where calls are being forwarded to and their current status.

From this screen you can call the contact back by clicking on the brown arrow icon . Once the party you are ringing back becomes available your phone will ring. After answering your phone, a call will be placed to the party you have requested to 'Ring Back' and

you will here their line ringing.

In addition, the Voicemail icon  allows you to leave a voice message in the selected contact's mailbox. You can also send a message to the contact by typing it into the text box provided. The message can be assigned a priority. When you have finished writing the message, click on the 'Send' link to send it. A 'Message waiting' icon will then be displayed in the recipient's User Interface.


## 4.3. Favourites Extended Menu



Each of the defined names in your favourites list is a link. Clicking on this link (when you are not in a call) displays an additional menu of options allowing you to choose how to interact with that person.

The status of the contact is shown, including their full name and number, if they are online (meaning their User Interface is open), and whether their phone is attached ('attached' means that the contact's phone is registered with the PBX).

The contact's status is shown as 'Available' in this case and the contact

can be called by clicking on the green arrow . Your phone will then ring and, once picked up, will complete a call to the contact.

## 4.4. Indicators



There are three indicator icons which will be displayed just above the 'Call' section, to indicate if: you have missed any calls, have new Voicemail, or if you have new Instant Messages. These are discussed in detail in [5.2 'History'](#).

### 4.4.1. Missed Calls

Clicking on the 'Missed Call' indicator will display the details of the calls that you have missed.

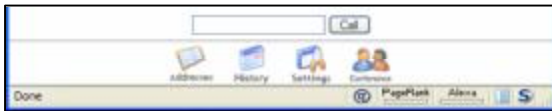
### 4.4.2. Voicemail

Clicking on the 'Voicemail' indicator will display the details of any new Voicemails that have been left for you.

### 4.4.3. New Message

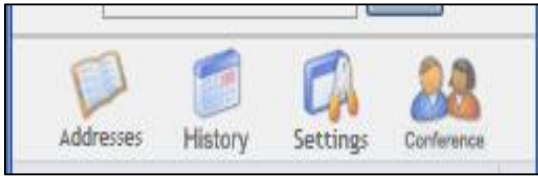
Clicking on the 'Message' indicator will display the details of any new Instant Messages that have been left for you.

## 4.5. Calling



At the bottom of the 'Favourites' screen is a text box where you can enter an extension or external phone number to call. Once entered, click on the 'Call' button. Your phone will then ring. After you pick up the phone, a call will be initiated and if the other party is available you will hear ringing. You can then complete the call normally.

## 5. Configuration



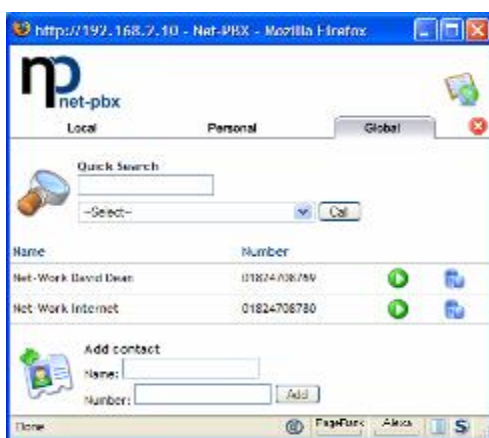
The bottom section of the User Interface allows you to customise your interface and to change personal options. The four sections are described below.

### 5.1. Addresses



The screen on the left is a typical 'Address' screen. The 'Local' tab shows all the addresses on the PBX that you are connected to. These are defined as all users of the PBX. As such, they can only be changed by the system administrator.

The screen on the left is a typical 'Personal' screen. The 'Personal' tab shows your customisable contact list. From this screen you can call contacts or delete them from the list. Adding a contact is simple: fill in the name and number and then click on the 'Add' button. The 'Quick Search' facility allows you to quickly find a personal contact if you have a large number of contacts in your personal address book.



The 'Global' list shows any contacts that are relevant to all users and are available to all users. You can call or delete these from your address list. Deleting entries from the Global list will mean that they will not be available to any user on the PBX. In general, contacts that are relevant only to you should be added to your 'Personal' address list (as described above). Contacts relevant to anybody in the organisation, for example 'Reception', should be entered in the 'Global' address list.

On both the 'Personal' and 'Global' lists there is a search function available: enter the required information and the entry will be displayed. Pressing the 'enter' key on your keyboard or clicking on the 'Call' button will call that entry.

Clicking the red 'X' symbol  on the screen will close it.

## 5.2. History


The History section, which appears at the bottom of the User Interface, allows you to view records of your calls and messages in the following categories:





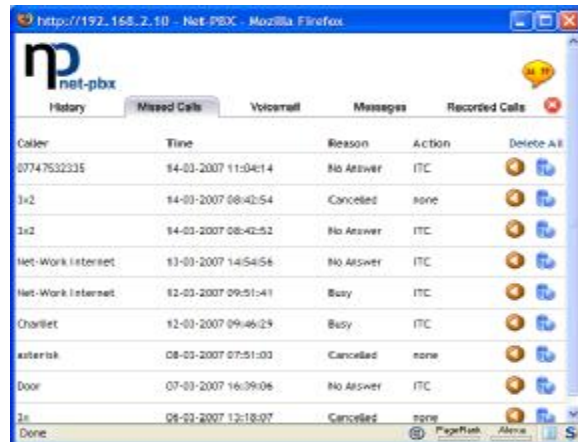
Missed Calls, Voicemail, Messages and Recorded Calls. In the Favourites section, if you have for example a missed call or a message, a link will be displayed as described below. Clicking on this link will display the History page, shown opposite. Under the History tab you can see two further tabs: 'Full View' and 'Simple View'. 'Full View' is shown here. This provides you with a detailed history of call activity for your extension.

### 5.2.1. Missed Calls




If you have a missed call you will be notified by the 'Missed Call' link . To view the details simply click on the link.





This will present you with the 'History' window, as described above, but open in the 'Missed Call' tab window; from here you can see the details of the missed calls, delete the entries by clicking on the delete icon , or call them back by clicking the brown arrow  (if the relevant number is available to the Net-PBX; it might not be available if, for example, the caller withheld their number).

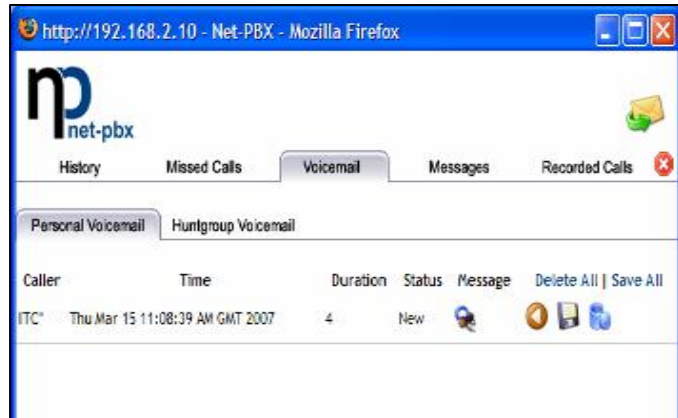


### 5.2.2. Voicemail



If you have new Voicemail you are notified by the 'Voicemail' link  as shown opposite.



Clicking on the link will display the 'History' screen, open in the 'Voicemail' tab. From here you can manage your Voicemails by clicking on the icons, with options to save , delete , listen  (speakers required on your PC) or call back  the caller.

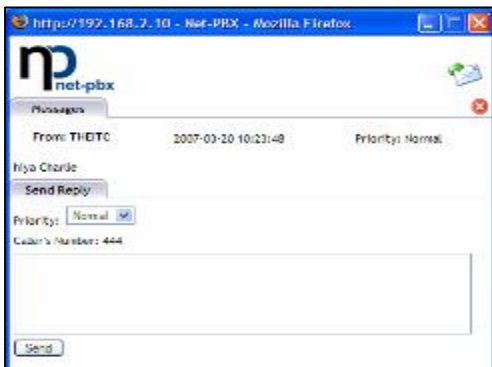
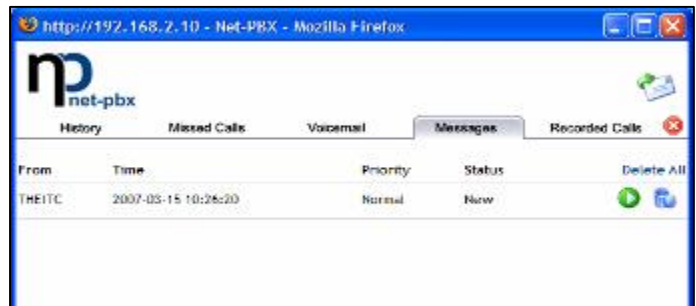


### 5.2.3. Messages



The 'Messages' link tells you if you have received any new Instant Messages.

Clicking on the 'Messages' link will display the 'History' screen, open in the Messages tab. From here you can read your messages by clicking on the Icon  which will open a Messages screen as shown below. You can delete the message by clicking on the delete icon .



In this screen you can read and reply to message and see full details of who sent the message and when it was sent.

### 5.2.4 Recorded Calls



This screen shows details of recorded calls. You can record a call through the telephone handset by transferring the call to \*63. Transferring the call through the telephone handset is described in the telephone user guide for your specific handset.

### 5.3. Settings

Click on the 'Settings' icon at the bottom of the UI screen to display the Settings menu. The Settings menu has several sections, which are described below.



### 5.3.1. Favourites

Clicking on the 'Favourites' Tab will display the favourites as shown above. From here you can 'Update' and 'Remove' entries from your favourites as well as add new entries.

The 'Select Contact' drop down menu shows a list of all the defined extensions on your Net-PBX. To add one of these to your list of favourites just click on the entry and then click 'Add'.

External contacts can be added by leaving the drop down box as 'External' and filling in the other three fields, and then clicking 'Add'.

The 'Nick Name' field allows you to add a familiar name for the contact. This name will determine the display order of your favourites in your UI (i.e. Nick Names starting with 'A' appear first).

These updates will be displayed on the main screen of your User Interface.

### 5.3.2. Forward Rules

This section allows you to define how incoming calls are handled when your phone is busy, not answered, or unattached. You can also set an 'unconditional forward', which means that all your calls are forwarded without your phone ringing. Priority is given to the 'Unconditional' forward rule: if this is set then it overrides all other forward rules.




Valid entries for the fields are 'blank', meaning forwarding will be automatically to voicemail (except for the Unconditional field), 'voicemail' meaning the call is sent to your Voicemail box, to an extension on the Net-PBX, or to an external number.

The 'Go Remote' option allows the PBX to send all your calls to a remote-capable device, if that device is available to the Net-PBX. It overrides all other options programmed. For example, even if you set unconditional forward to another number your calls will still be sent to the 'Go Remote' device. For details of this feature see your system administrator.

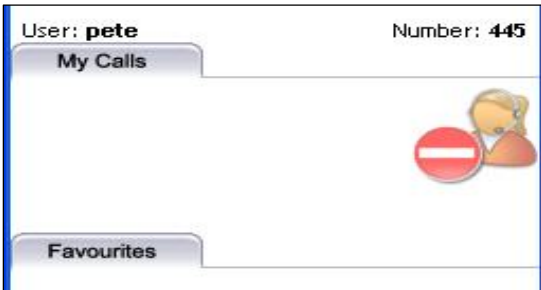
### 5.3.3. Do Not Disturb




This option allows you to control your 'Do Not Disturb' (DND) function. If 'DND' is enabled then all calls are sent to the destination defined in the 'Forward Calls to' field. The default option is 'Voicemail' if this field is left blank.

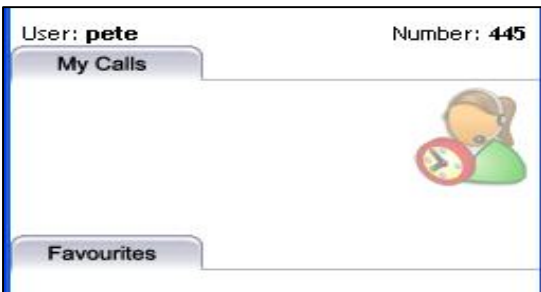
An exception list can be built up by defining numbers that will be allowed to call your phone even if 'DND' is enabled. These entries can be removed by clicking on the delete icon .


The hunt group skip function allows you to enable 'DND' if you are part of a Hunt Group so calls would skip your extension and go to the next extension in the Hunt Group.



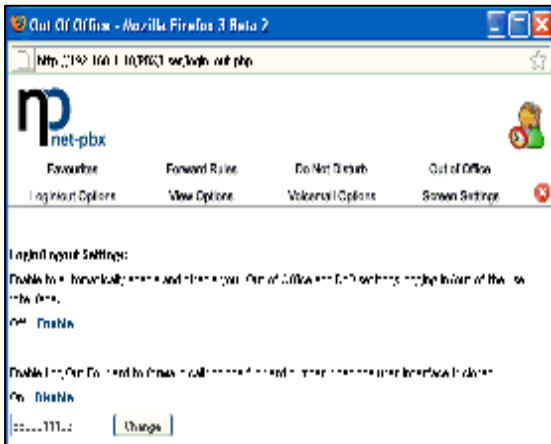
If 'DND' is active the main window of the User Interface will show a status icon as opposite. Your status shown to other users in their User Interfaces will show this icon .

### 5.3.4. Out Of Office



This feature allows you to direct all your incoming calls to another destination while you are out of the office. When 'Out Of Office' is enabled your status shown to other users in their User Interfaces will show this icon .

### 5.3.5. Login / Logout Options

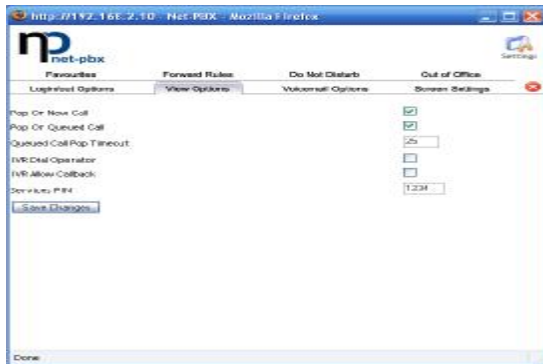


This feature allows you to automatically enable and disable your Out Of Office and DND settings to on or off when logging out or logging in.

The Log Out Forward option allows you to set a number to divert your calls to after you have logged out. This feature can be enabled/disabled as required.

Take care when using these features, as it is easy to forget which options you set the last time you logged out.

### 5.3.6. View Options



This section allows you to define how your User Interface reacts when new call events occur. 'Pop On New Call' allows the UI to open and come to the top of your desktop when you have an incoming call.

'Pop On Queued Call' does the same as above for a call which is Parked or on Hold. 'Queued Call Pop Timeout' defines how often the UI will pop on top when a

call is placed in the queue. The visibility of the Pop-up browser window is dependent on the settings of other application windows that are open on your screen at the same time. For instance some application may not allow the Pop-up browser window to come to the front of the screen, so the window will Pop but it might be behind an already open screen.

The 'IVR Dial Operator' option allows you to add the option of callers being able to dial through to the operator rather than just leaving a Voicemail message.

'IVR allow Callback' allows a caller to request a 'Callback' if your extension is busy, as an alternative to leaving a Voicemail message. The caller must have Caller Line Identity enabled for this function to work.

Services PIN defines the PIN you must enter to use the '\*' code services that require it, including Voicemail.

Once you have made your changes click the 'Save Changes' button.

### 5.3.7. Voicemail Options

You can choose if the caller's number should be included in the messages informing you of a new Voicemail.



The method of delivery of Voicemails can also be changed from the dropdown list.

You can choose to:

- Send the Voicemail as an eMail attachment and delete the Voicemail from the PBX.
- Send the Voicemail as an eMail attachment and save it on the PBX.
- Send a notification of a new Voicemail to your eMail account and save the Voicemail on the PBX.
- Save the Voicemail on the PBX without any eMail action.

The destination eMail address to send the Voicemail to can be set and changed on this page. Click on the 'Set' button to apply any changes you have made.

You can also listen to or delete your personal Voicemail greeting on this page by clicking the listen or delete link. To record a voicemail greeting dial \*65# and choose option 1.

### 5.3.8. Screen Settings



This screen allows you to change the dimensions of the User Interface. Various fixed sizes are available to allow you to customise the amount of screen space the User Interface window takes up and the amount of information you can see without needing to scroll.

### 5.4. Conferencing



To initiate a conference you need to establish a list of participants. To add a participant you can either enter a 'Number' and then click on 'Add' or click on the Address Book icon, which opens the system address book for you to choose participants from.

Participants can be deleted from a conference invitation list by selecting them and then clicking on the 'Delete Item' button.

To start the conference, simply click on the 'Start Conference' button. You and all the participants on the list will be called and automatically added to the conference once they, and you, have answered the call and confirmed that they wish to participate.

Participation is confirmed by pressing '1' on the phone.