Extensions

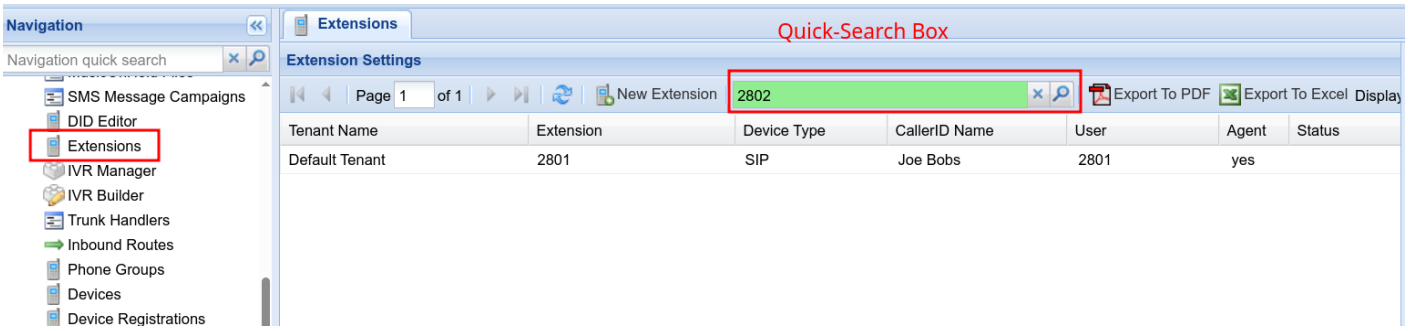
- IntellaPhone Setup Instructions
- Extensions (Archive)
- Overview

IntellaPhone Setup Instructions

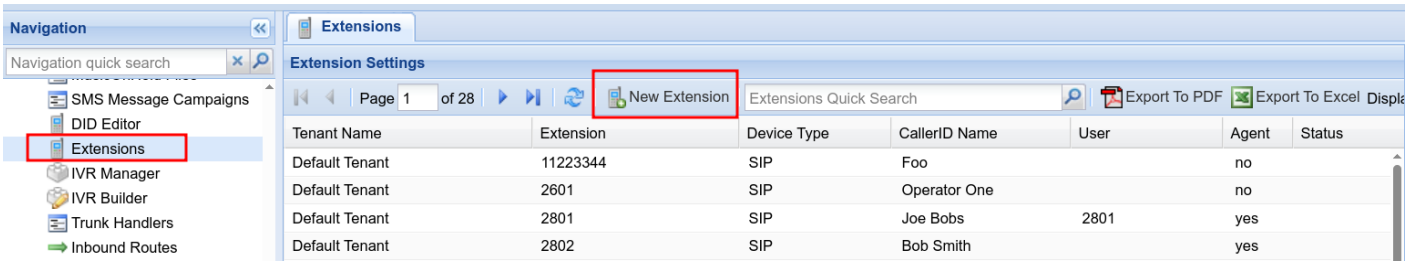
First: Choose Extension or Create New

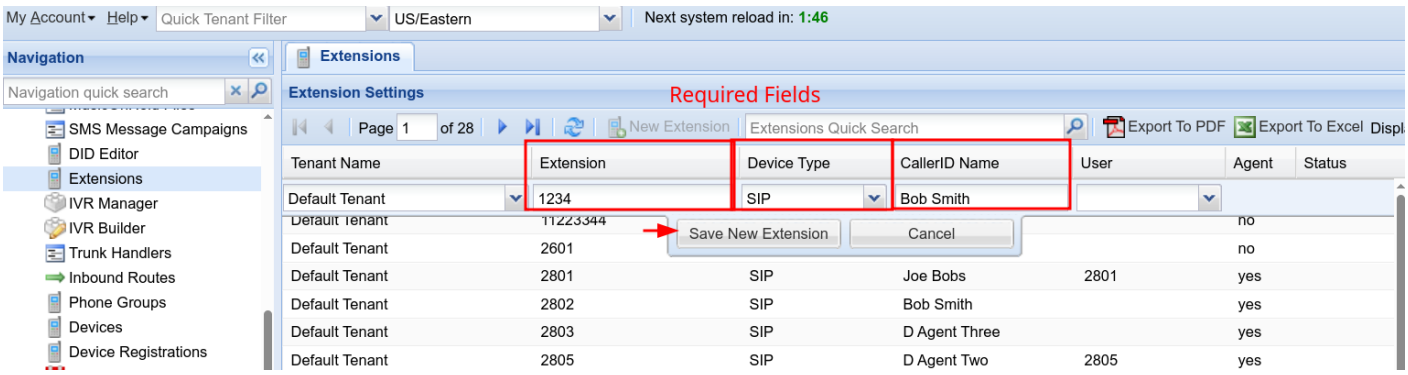
1) Locate Extensions, and then find the Extension to set as a SoftPhone
 or
2) Use the 'New Extension' button

Locate



Create New





Next: Set CallerID Name and Phone

Make/Model

1) Set CallerID name
2) Enable Voicemail (optional)
3) Set Email Address (optional, for voicemail)
4) Set Phone Make: IntellaPhone
5) Set Phone Model: IntellaPhone PC

1.png

Second Step: Send the Invitation Email

2.png

Third Step: Wait for Email to be Sent. This may take 30 seconds or more.

Fourth Step:The user will receive an email that looks like the following

3.png

The above link is purely an example. It is important to use the exact link that was sent in the email in order to proceed to the next step.

Fifth Step: The user will visit the URL in the email and install the application

Once installed, the user will then copy and paste the Username and Password into the matching fields of the application logon



1) Download and install the IntellaPhone Application

2) Once installed, copy the Username from this web page into the Username field of the Account Box

3) Followed by, copy the Password from this web page into the Password field of the Account Box

4) Leave 'Remember Details' checked

Extensions (Archive)

The **Extensions** screen allows you to associate **Extensions** with phones. A phone must have an **Extension** associated with them to receive calls. **Extensions** can be associated with physical phones, soft phones, or voicemail boxes.

- Adding an Extension
- Additional Extension Settings
- Removing an Extension

Adding an Extension

Start by navigating to the **Extensions** screen via the **Navigation Panel.** Next click **New Extension** button. A row editor will appear in the grid below.

	Field	**Type**	**Description**
Required	Extension	Numeric	Extension number
	Device Type	List	Type of Device the extension will be associated with
	CallerID Name	Field	Caller ID name, this may be overwritten depending on system settings

Optional	User	List	Portal users to be associated with this extension
	Voicemail	Checkbox	Enables or disables voicemail
	Voicemail Pin	Numeric	Pin number to access voicemail, will only show if voicemail has been enabled.
View Only	Agent (further explained below)	Value	Yes/ no value, states whether or not this extension is associated with an Agent (part of the IntellaQueue/call center settings)
	Status (further explained below)	Value	Status of device registered to server.
	IP (further explained below)	Numeric	Internet Protocol address of the extension.
	Port (further explained below)	Numeric	Protocol port that the extension residents on

Start by navigating to the **Extensions** screen via the **Navigation Panel.** Next click **New Extension** button. A row editor will appear in the grid below.

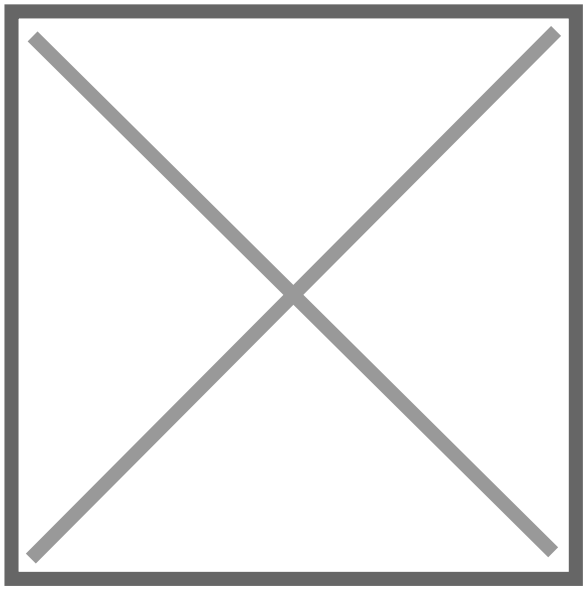
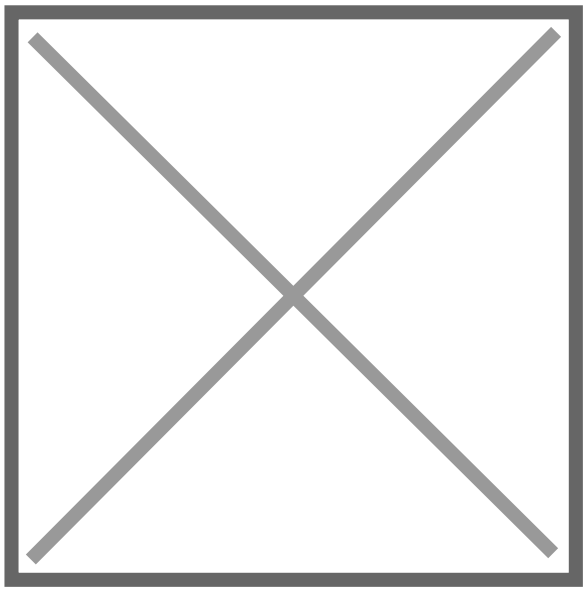


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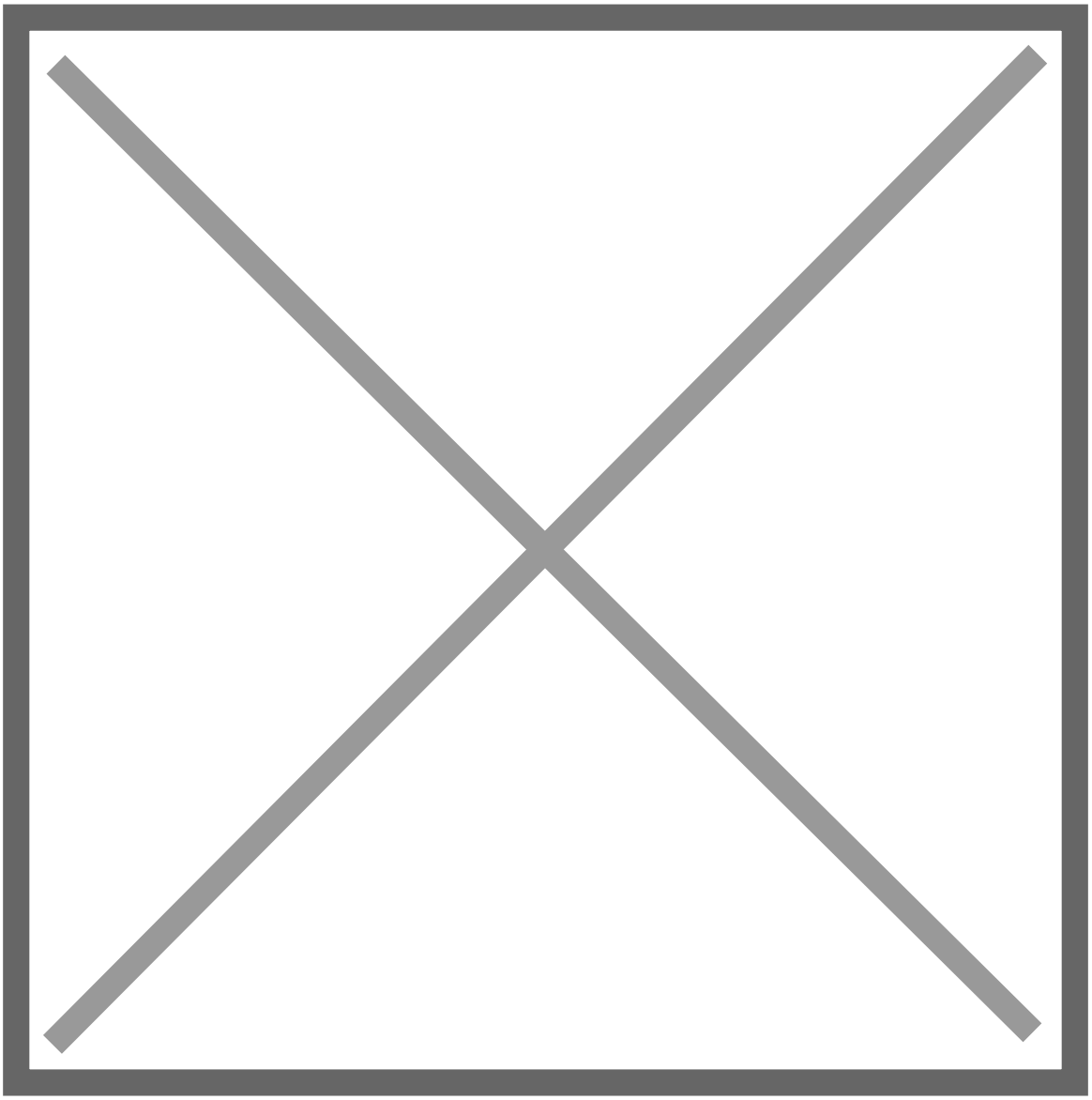
image.png



The following options will be dependent on your organizations needs, so it is important to consult with your system administrator during your initial setup of your IntellaSoft web portal, or making any changes thereafter. Start by adding an appropriate **Extension** number, afterwards select the type of device you are creating the extension form. Several options are available from the drop down men.

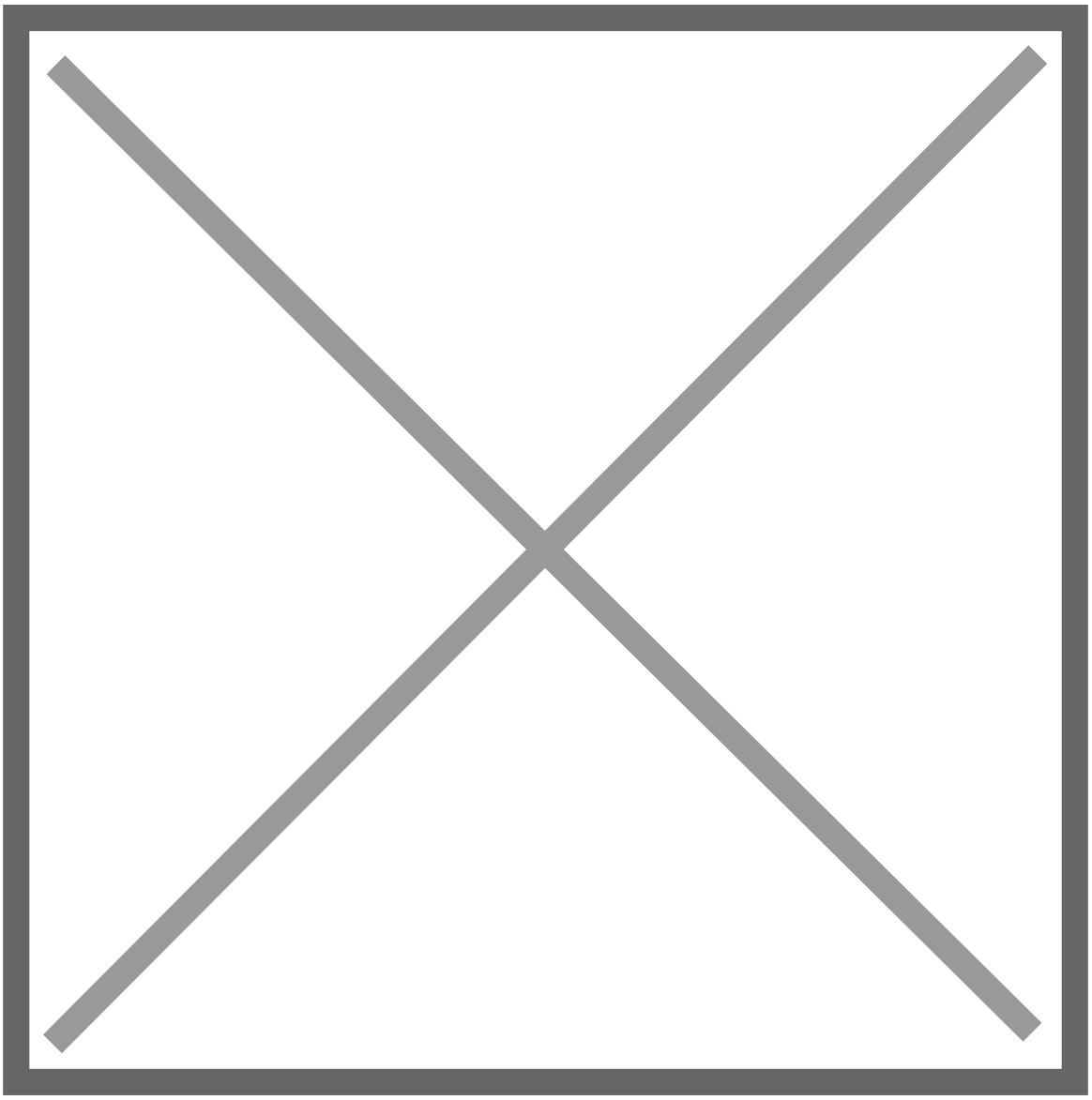
image.png

Afterwards, select a **CallerID Name**, this is what will appear when this extension attempts to call others within the organization.



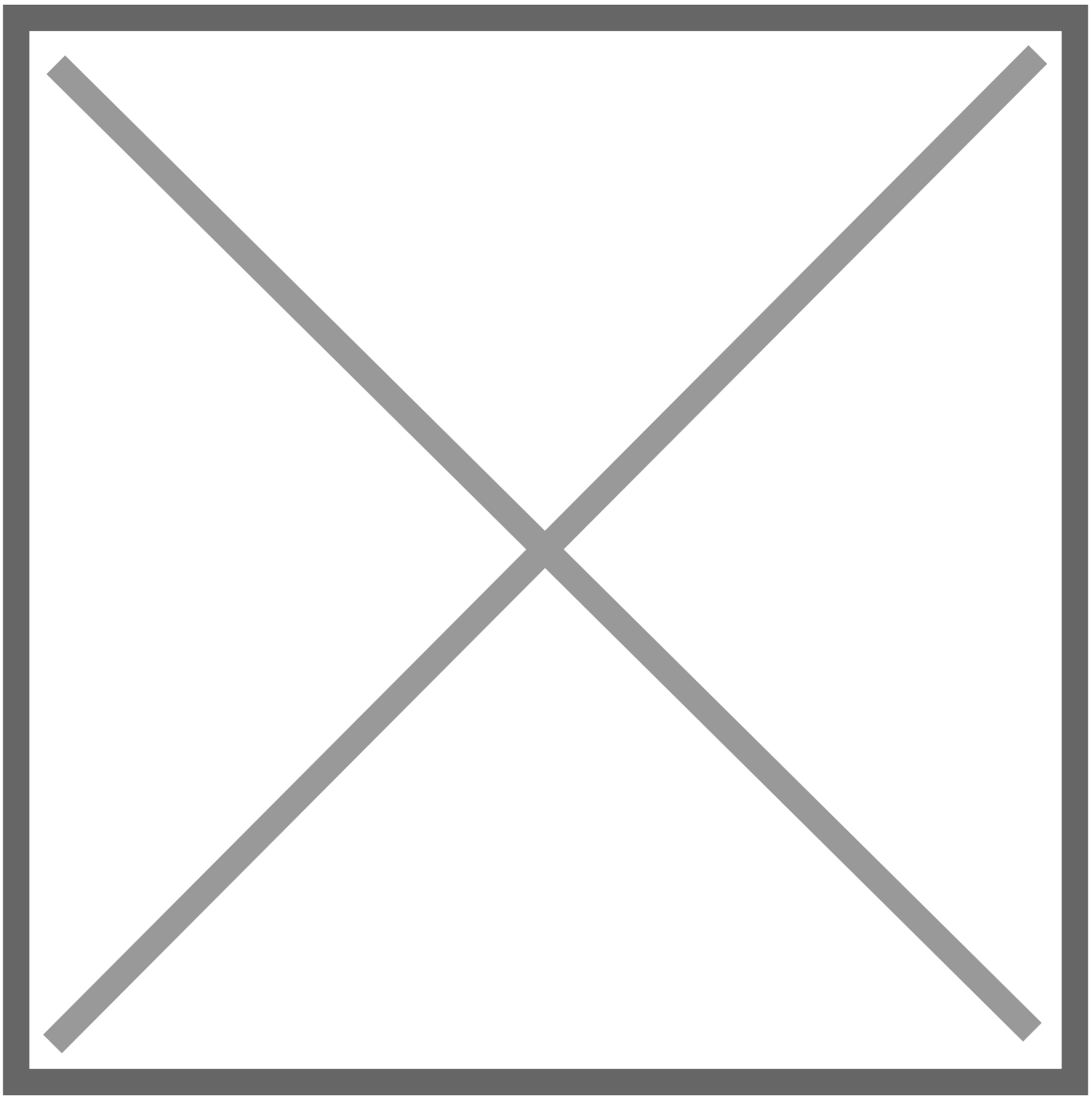
SITUATION DEPENDENT: If the **Extension** you are adding will also have a **User** that requires permission access (see **Users** page for more information on configuring users), select the appropriate **User** from the drop down menu. If this does not apply **skip to step 6**.

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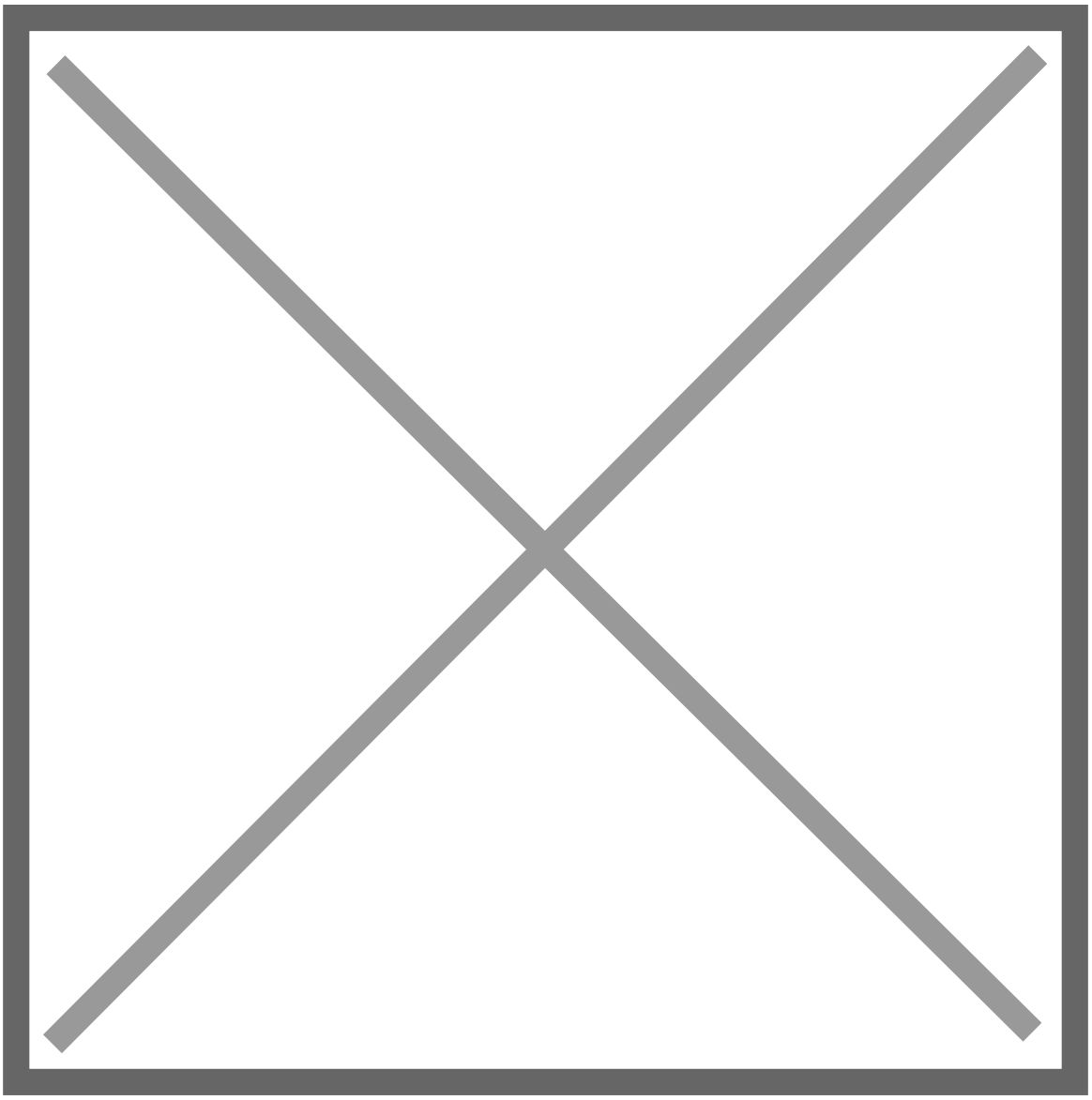
At this point, you will also have the option to setup a **voicemail** for the **Extension.** If the extension does not require a voicemail go ahead and click **Save New Extension** (if you go ahead and save you will see a message stating **Changes Saved)**; otherwise move on to step 7. To enable voicemail, click the checkbox in the **Voicemail** column, afterwards select a numerical **PIN** for the voicemail, we recommenced something memorable between 4-8 digits.

image.png



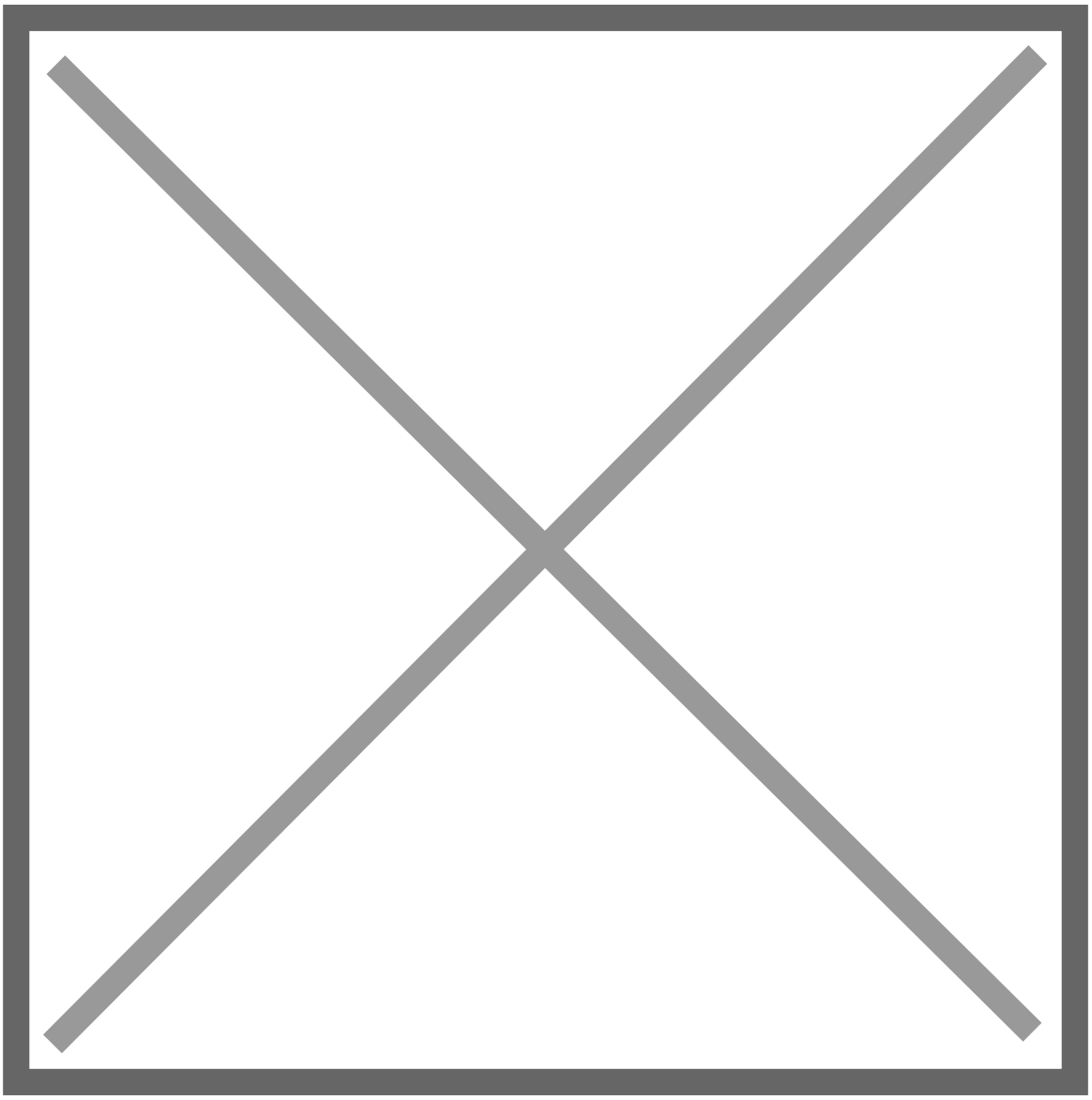
Next, you also have the option to have voicemail notifications and recording sent to email, in the following box simply input the desired email address that voicemail recordings and notifications can be sent to. **Important:** Ensure that the email address you have inserted is correct.

image.png



Lastly; review **all** of the information submitted from **Extension Number** to **Voicemail Email,** once you have ensured all of the data is correct and accurate click **Save New Extension.** Afterwards you will see a message stating **Changes Saved.**

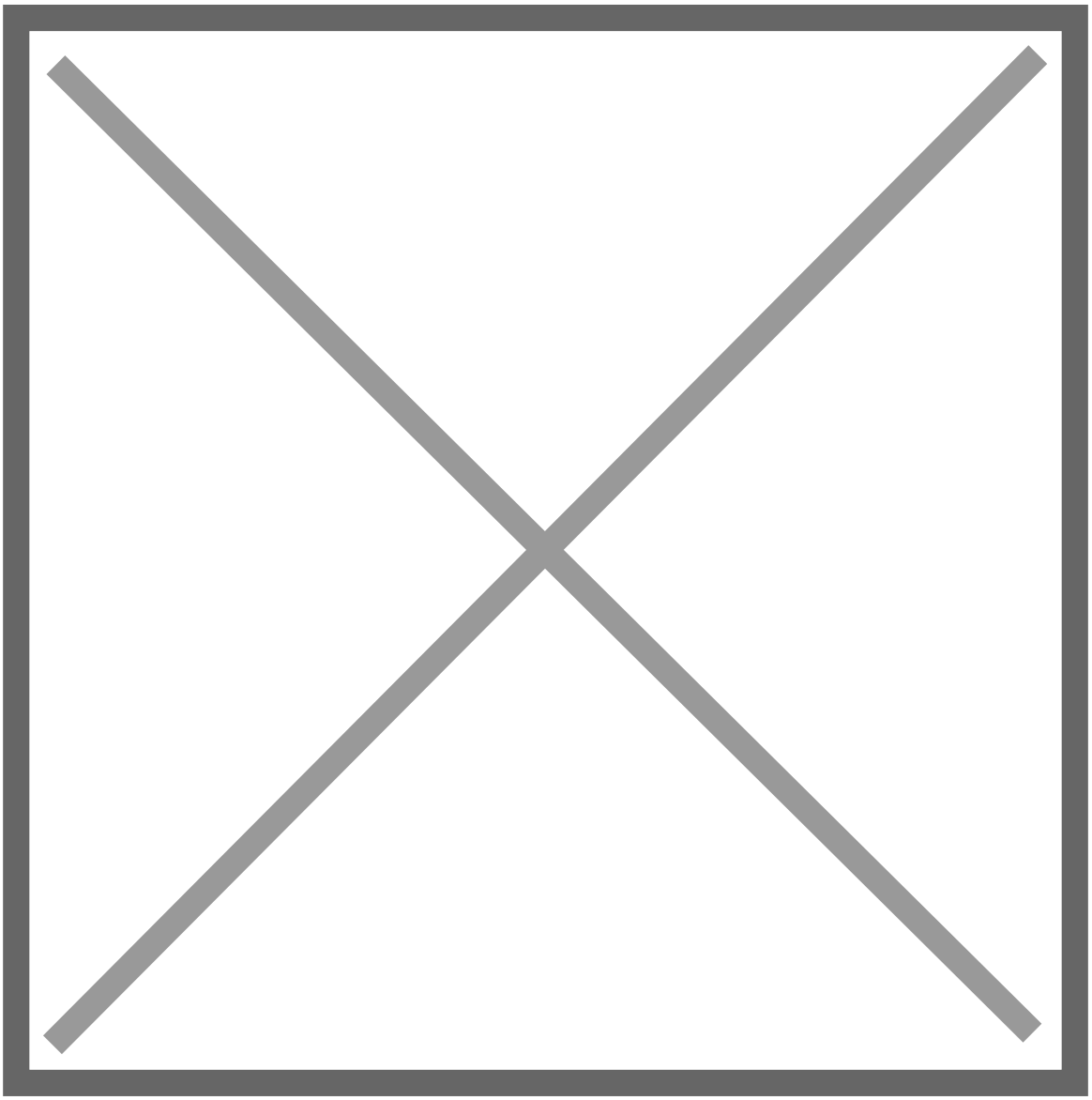
image.png



There are several important limitations to keep in mind regarding **Extension**.

Firstly, the number of **Extensions** depends on the licensing of your IntellaSoft web portal. Depending on the number purchased during your initial setup of your IntellaSoft system you may need to be purchase additional licenses to gain access to more extensions. We are working on a way to make this process seamless, but for now you will need contact your IntellaSoft Sales representative who will be more than happy to assist you during that process. If you see an error such as the one below, this means you have reached the maximum number of **Extensions** your licenses allow for.

image.png



Next, you may have noticed 4 columns with information that you cannot edit. This is simply information that the **IntellaSoft** web portal is reading from the server, and are explained below.

image.png

Agent: In this column it will simply state **Yes** or **No. Agents** are are specific the **Call Center** options of IntellaSoft Web Portal**.** This information is helpful in large organizations with multiple departments including ones that have a dedicated call center with live **Agents**, whether or not an **Extension** is identified as an agent depends on your licensing configuration and organizations needs. If you are needing add a call center to your IntellaSoft Communications Platform**,** contact your IntellaSoft representative to discuss options.

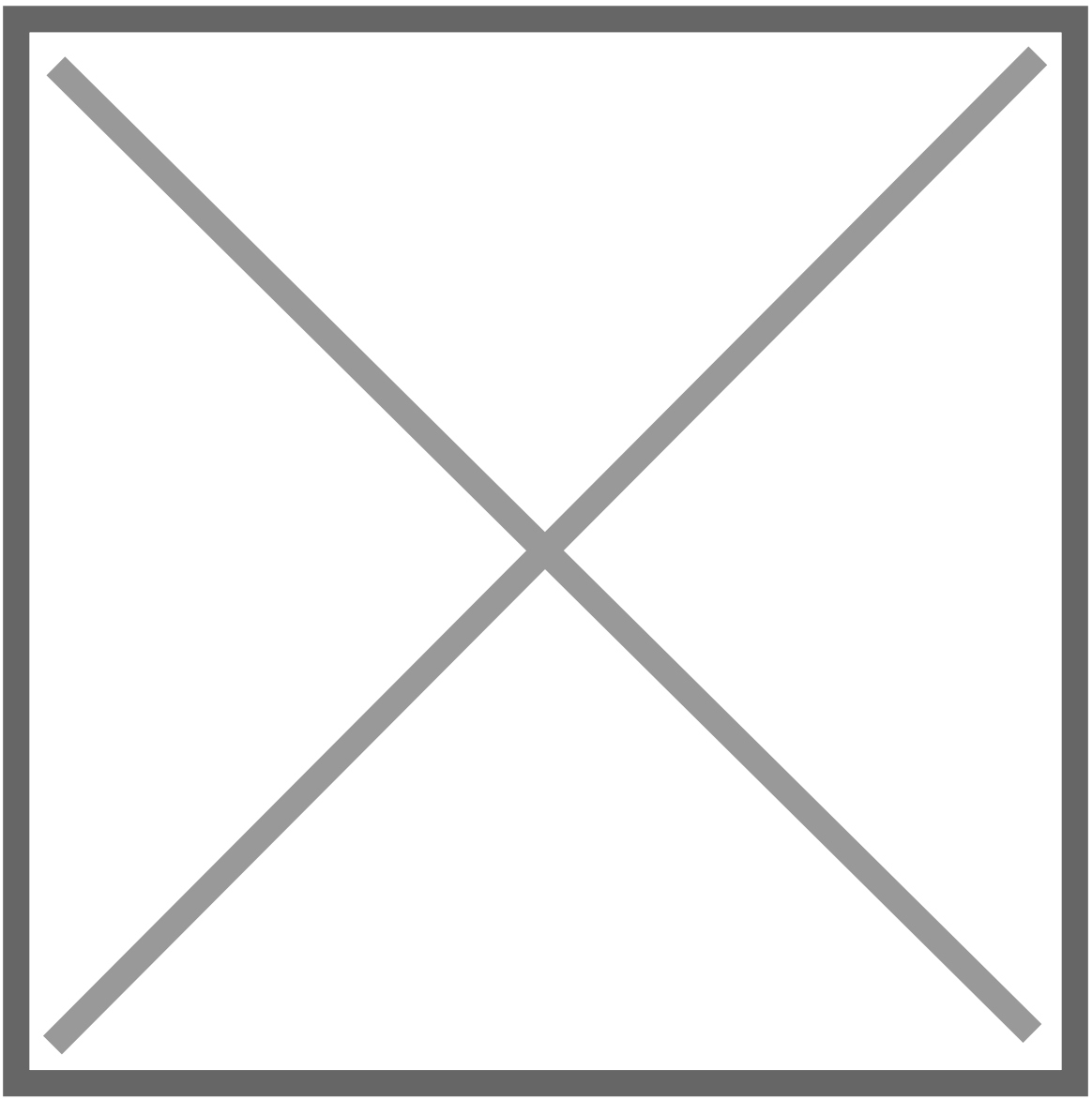
Status: See the table below

Status	Definition

OK	The end-point is registered and properly running on the server (you should see an **IP** and **Port** associated with the extension). An end-point can represent a physical phone, software phone, PA speaker, as well numerous other physical or virtual communication devices.
UNREACHABLE	The system cannot reach the phone, but the phone has been registered prior. This usually indicates that there may be an issue. Contact your system administrator for assistance.
UNKNOWN	This will be the status of the endpoint when it was previously UNREACHABLE, and the system has given up trying to contact the endpoint.
UNMONITORED	This means that the endpoint has intentionally been set so it does not monitor status. The IP and PORT will only be populated if these are configured. Despite being Unmonitored, the endpoint can still be called. When this endpoint is called, the system will try to reach it until the system defined timeout is reached. If the endpoint is unresponsive at the time of the call, the call will fail.
BLANK	No phone has been registered to this extension. There could be several reasons for this, the phone could simply not be plugged in or programmed to this extension. The Contact your system administrator if you suspect a problem.

IP: This columns refers to the IP (or Internet Protocol) Address that the extensions lies on. This information is automatically updated based on the current server information. Generally speaking this is utilized by IntellaSoft staff, your organizations IT or System Administration to diagnose potential problems, should they arise. If you have questions regarding this, please direct them to your System Administrator. IP of the phone itself

Port: Port that the phone resides on.



Additional Extension Settings

Extensions may have to have additional information about them, this will depend on your organizations needs. Contact your system administrator for more information.

Name	Definition
DID	Inbound DID
Twinning #	Twinning number. Ring an external number such as a cell phone.
Phone make	Make of the phone in question
Phone Model	Model of the phone in question
MAC	MAC address of the phone, if registered to a physical phone
Phone Reg #	Registration number on the physical phone (ie: polycom reg number)
External CallerID	What callerid to use when the extension dials out a route
All Call Forward	Call forwarding
Class of Service	Class of service when this extension makes a call

Phone Group	Phonegroup that this extension is a member of
Secet	Secret password to use for incoming and outgoing requests, unless overridden using 'auth'

image.png

Removing an Extension

Navigate to the **Extensions** screen. Select the **Extension** you wish to delete, and then click on the red **X** in the **controls** column.

Warning

Caution should always be exercised when removing an **Extension**. Even if an extension is not physically used and thought to be inactive, or it is not connected -- the associated voicemail box might be being used elsewhere in the system, or the extension may have a [Call Forward] in place. Ensure that it is verified that all functions related to this extension are unused or unneeded before removing.

A confirmation pop up will appear confirming your selection. If you wish to delete click **OK**, you will see a message stating **Changes Saved**, if this is not the entry to wish to delete click **Cancel,** to return to the screen.

image.png

Overview

- Configurations
  - Additional Configurations
- Adding an Extension
- Editing an Extension
- Deleting an Extension
- Additional Notes

An **extension** is an assignment to a physical phone, softphone, voicemail box, or any similar device configured within the system. A phone must have an extension assigned to it to receive calls.

> A user cannot configure his or her extension. Only an administrator can update an extension.

Configuration Options

Field	Type	Description	Required
Extension	Alphanumeric	Extension identifier Numeric digits are recommended if the extension must be dialed from a phone.	Yes

<table>
<tr><th>Field</th><th>Type</th><th>Description</th><th>Required</th></tr>
<tr><td>Device Type</td><td>List</td><td>Extension device type

<table><tr><th>Type</th><th>Description</th></tr><tr><td>SIP</td><td>SIP (Session Initiation Protocol) device</td></tr><tr><td>IAX2</td><td>IAX2 (Inter-Asterisk eXchange) device</td></tr><tr><td>DAHDI</td><td>DAHDI (Digium Asterisk Hardware Device Interface) device</td></tr><tr><td>VIRTUAL</td><td>Voicemail-only or call-forwarding extension, not connected to any physical device or softphone</td></tr><tr><td>SIP-VIRTUAL</td><td>Additional extension on a device that supports multiple extensions</td></tr></table>
VIRTUAL and SIP-VIRTUAL device types do not use extension licenses</td><td>Yes</td></tr>
<tr><td>CallerID Name</td><td>Field</td><td>Caller ID name – displayed on devices that support caller ID</td><td>Yes</td></tr>
<tr><td>User</td><td>List</td><td>The portal user associated with the extension (refer to Users for more information) – select if a specific user requires permission to access

VIRTUAL and SIP-VIRTUAL device types do not use extension licenses.</td><td>Yes</td></tr>
<tr><td>Agent</td><td>Value</td><td>Indicates if the extension is associated with an agent</td><td>Read-only</td></tr>
</table>

<table>
<tr><th>Field</th><th>Type</th><th>Description</th><th>Required</th></tr>
<tr><td>Status</td><td>Value</td><td>Status of the device registered to the server

<table><tr><th>Status</th><th>Description</th></tr><tr><td>OK</td><td>The device is registered and configured

IP and port are always displayed for this status.</td></tr><tr><td>UNREACHABLE</td><td>The system cannot reach a registered device

An UNREACHABLE status could indicate an issue. Contact your system administrator if you suspect a problem.</td></tr><tr><td>UNKNOWN</td><td>The system has given up trying to contact an UNREACHABLE device</td></tr><tr><td>UNMONITORED</td><td>Endpoint is not monitored

IP and port are always displayed for this status. An UNMONITORED endpoint can still be called. When this endpoint is called, the system will try to reach it until it times out. If the endpoint is unresponsive, the call fails.</td></tr><tr><td>BLANK</td><td>No device is registered to this extension

A blank status could indicate an issue.</td></tr></table></td><td>Read-only</td></tr>
</table>

<table>
<tr><th>Field</th><th>Type</th><th>Description</th><th>Required</th></tr>
<tr><td>IP</td><td>Numeric</td><td>Internet protocol address (IPv4 format – e.g. 255.255.255.255) assigned to the extension</td><td>Read-only</td></tr>
<tr><td>Port</td><td>Numeric</td><td>Device signaling port</td><td>Read-only</td></tr>
<tr><td>Voicemail</td><td>Checkbox</td><td>Enables or disables voicemail</td><td>No</td></tr>
<tr><td>Voicemail Pin</td><td>Numeric</td><td>Voicemail PIN – enabled if voicemail is enabled</td><td>Yes if voicemail is enabled</td></tr>
<tr><td>Voicemail Email</td><td>Email</td><td>Email address where voicemail messages are sent – enabled if voicemail is enabled</td><td>No</td></tr>
<tr><td>Controls</td><td>n/a</td><td>Extension tools<table><tr><th>Icon</th><th>Description</th></tr><tr><td>image.png</td><td>Opens the Voicemail configuration manager</td></tr><tr><td>image.png</td><td>Opens the Phone Buttons configuration manager</td></tr><tr><td>image.png</td><td>Delete extension – see Deleting an Extension below</td></tr></table></td><td>n/a</td></tr>
</table>

Additional Configuration

Some extensions require additional configuration, depending on your organizational needs. These configuration options are described under Phone Configuration. Contact your system administrator for more information.

Adding an Extension

1) Click **Extensions** on the Navigation pane. The Extension Settings pane appears.

2) Click **New Extension** on the upper menu.

image.png

3) Enter the fields as required. Refer to Configuration Options above.

4) Click **Save New Extension**.

The new extension has been added.

Editing an Extension

1) Click **Extensions** on the Navigation pane. The Extension Settings pane appears.

2) Double-click the extension row you want to edit. You should see a row editor.

3) Make any desired edits. Refer to Configuration Options above.

4) Click **Save.**

Deleting an Extension

> Warning: Even if an extension is inactive or disconnected, it may have call forwarding enabled, or the associated voicemail box may be used elsewhere. Ensure all functions related to the extension are unused before removing it.

1) Click **Extensions** on the Navigation pane. The Extension Settings should appear.

2) Under the Controls column, click the red **X** for the extension you want to delete.

3) Click **OK** to delete the extension.

Additional Notes

- The number of available extensions depends on your IntellaSoft licensing. You may need to purchase additional licenses to add more extensions. Contact your IntellaSoft sales representative for more information.