

# Phone Configuration

## Overview

The **Devices** screen is for adding physical phones to the system, removing them from the system, or attaching them to an extension.

The **Extensions** screen is for managing the properties of individual extensions.

The **Phone Buttons** screen is for programming the function buttons on a phone.

The **Device Registrations** screen provides configuration options for phones.

The **Phone Groups** screen (not fully supported) is for creating groups of extensions that share some properties.

- [Overview](#)
- [Adding and configuring a new phone](#)
- [Devices](#)
- [Extensions](#)
- [Phone Buttons](#)
- [Device Registrations](#)
- [Phone Groups](#)
- [Removing a Phone](#)

## Adding and configuring a new phone

1) First, create a new extension on the **Extensions** screen.

- "Extension" can be any unused extension.
- "Device Type" should usually be SIP.

- "CallerID Name" should be something that identifies the phone.
- All other fields are optional. For more information, see [Extensions](#).

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If you get the error "**No valid Data Center license found**", please go to [Atlassian Marketplace](#) to purchase or evaluate the Refined Toolkit for Confluence Data Center. Please read this [document](#) to get more information about the newly released Data Center version.

2) Create a new device on the **Devices** screen.

- "MAC" should be the MAC address of the new phone.
- "Main Extension" should be the extension created in Step 1.
- "Phone Type" is the manufacturer of the phone; either POLYCOM or YEALINK.
- All other fields are optional. For more information, see [Devices](#).

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If you get the error "**No valid Data Center license found**", see above.

3) Configure the device on the **Device Registrations** screen.

- For information about the specific fields, see [Device Registrations](#).

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# Devices

The **Devices** screen consists of two panels: "Device Settings" and "Additional Device Settings".

## Device Settings

Name	Description (What it does)	Properties (How you interact with it)
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MAC	The MAC address of a physical phone.	Every device must have a unique, properly formatted MAC address.
Main Extension	The device's assigned phone line. A device must have an extension to make or receive calls.	Extensions can be created on the <b>Extensions</b> screen. Two devices cannot have the same extension.
Main CallerID	Internal CallerID. This is seen only by phones on the same network.	Auto-filled based on assigned extension. Can be configured on the <b>Extensions</b> screen.
Main PhoneGroup Name	The PhoneGroup of the selected extension. Extensions in the same PhoneGroup will have some shared properties.	Auto-filled based on extension. PhoneGroup can be created on the <b>Phone Groups</b> screen and assigned on the <b>Extensions</b> screen.
Phone Name	A name assigned to the phone.	An optional field used only for bookkeeping.
Phone Type	The manufacturer of the phone.	Must be POLYCOM or YEALINK.

## Additional Device Settings

Name	Description	Properties
Phone Model	The model number of the phone.	An optional field used only for bookkeeping.
NTP Server	The address of the time server used to update this device's clock.	Optional. If blank, a default NTP server will be used. Typically only necessary for off-site phones.
Secure Provision	Determines whether this phone encrypts its provisioning information. Turning this on requires additional setup.	Off by default. Typically only necessary for phones using off-site or publicly accessible networks.

## Extensions

The **Extensions** screen consists of three panels: "Extension Settings", "Additional Extension Settings", and "Notes".

## Extension Settings

Name	Description	Properties
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Extension	An extension.	Must be unique. Can be assigned to a phone on the Devices screen.
Device Type	The communication protocol used by this extension.	Once set, this is typically not changed. Usually it should be SIP. IAX2 is used for high volume networks. DAHDI is rarely used. VIRTUAL is used for call forwarding or mailboxes. SIP-VIRTUAL allows one phone to have multiple attached extensions.
CallerID Name	The internal CallerID for this extension. Only visible on internal calls (calls between phones registered on the portal).	No technical restrictions. This should be some descriptive identifier, such as the name of the phone's primary user.
User	The web portal account assigned to this extension.	Optional. If set, this allows a user-level account to manage their assigned extensions through the web portal.
Agent	Shows whether this extension is assigned to a registered Call Center Agent.	Read-only. This is set on the Agent Allocation screen and may not be available on all systems.
Status	OK: this extension is reachable through the network. UNREACHABLE: this extension is not responding to network activity. UNKNOWN: there is no registered associated device.	Read-only.
IP	The network address used by this extension's associated device.	Read-only. This is typically a dynamic address and may change.
Port	The network port used by this device.	Read-only. This is assigned by the host and typically not changed.
Voicemail	Controls whether or not this extension has a voicemail box.	
Voicemail PIN	The password for this extension's voicemail box.	Must be defined if voicemail is enabled. It can be any numeric string and should be at least 3 digits long.
Voicemail Email	Voicemail notifications are sent to this email address.	Optional. This should be a working email address.

## Additional Extension Settings

Name	Description	Properties
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DID	This extension's direct line.	Optional. If provided, this must be a working phone number assigned to your system.
Hunt Other	Incoming calls to this extension will simultaneously ring the number listed here, and will be transferred to whichever line first picks up.	Optional. This may be another registered extension, or any external number (such as a cell phone).
Twinning #	Incoming calls to this extension, if not picked up, will stop ringing the main extension and instead transfer to the number listed here.	Optional. This may be another registered extension, or any external number (such as a cell phone).
Phone Make	The type of phone assigned to this extension.	Rarely used. This should usually be "Generic". Selecting "Soft Phone" populates the "Secret" field, allowing for setup of a simulated soft phone.
Phone Model	The assigned phone's model number.	Very rarely used. This should almost always be "Generic Phone".
MAC	The assigned phone's MAC address.	Information displayed here for ease of access. The assigned device can be changed here, but should normally be changed on the <b>Devices</b> screen.
Phone Reg #	This extension's list placement on the associated device's display.	Information displayed here for ease of access. This is typically "1" for all phones using only a single extension. Phones with multiple extensions should normally be managed on the <b>Device Registrations</b> screen.
Shared Line Label	If this extension is configured as a shared line, this will be its default display name. See <b>Shared Lines</b> for more information.	Information displayed here for ease of access. The <b>Phone Buttons</b> screen should be used for all shared line management. Changes made here <i>will not</i> update the <b>Phone Buttons</b> screen, potentially leading to mismatched and broken configurations.
Shared Lines	If this extension is configured as a shared line, this will be the maximum allowed number of concurrent calls. See <b>Shared Lines</b> for more information.	Information displayed here for ease of access. The <b>Phone Buttons</b> screen should be used for all shared line management. Changes made here <i>will not</i> update the <b>Phone Buttons</b> screen, potentially leading to mismatched and broken configurations.
Shared Line Default	If this extension's assigned phone has shared lines, this will be the default line used for outgoing calls. See <b>Shared Lines</b> for more information.	This is normally blank. It should be set if this is the primary extension of a phone that uses shared lines. An extension is a primary extension if the value of "Phone Reg #" is "1".

Note: PortID	The switch port used by this extension's assigned phone.	Optional. This is used exclusively for bookkeeping and can be any value.
External CallerID		
Internal CallerID		
Override Extension		
All Call Forward		
Class of Service		
Phone Group		
VM Subscribe Override		
VM Retention Days		
Secret		
Account Code		
Directory Includes		

## Notes

The notes section is a textbox where you can write notes about an extension.

## Phone Buttons

The Phone Buttons screen consists of two panels: "Included Extensions", and "Available Extensions".

## Included Extensions

Name	Description	Properties
Position		
Button Type		
Button Value		
Name		

Name	Description	Properties
Extension		
Override First Name		
Override Last Name		
Override Phone Number		
Label		

## Available Extensions

Name	Description	Properties
Name		
Type		
Extension		
PhoneGroup		

## Device Registrations

The Device Registrations screen consists of two panels: "Device Registrations", and "Additional Registration Settings".

## Device Settings

Name	Description	Properties
Reg #		
Extension		
Calls Per Line Key		
Line Keys		

Name	Description	Properties
Missed Call Tracking		
Ring Type		

## Additional Device Settings

Name	Description	Properties
Missed Call Tracking		
Override Display Name		
Override Label		
Override Username		
Override Password		
Override Server		
Override Port		
Override VMail		
Override PBX Transport		

## Phone Groups

The Phone Groups screen consists of a single panel: "Phone Groups".

## Phone Groups

Name	Description	Properties
Phone Group Name		
Description		
CallerID Name		
CallerID Number		
Record		
Operator Extension		

Name	Description	Properties
Operator Context		
Music On Hold		

# Removing a Phone

Caution should always be taken when removing a [Physical Phone Device]. Even if a phone may not be actively used by someone for placing calls, it may have a [Call Forward] in place. Ensure that all functions related to this phone are unused or unneeded before removing it.

- 1) Navigate to the **Phone Configuration** screen from the **Navigation Panel**.
- 2) Click on the phone you wish to delete and ensure that it's highlighted in blue
- 3) Next click the red **X** in the **Delete** column.
- 4) 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**.

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