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## Virtual PBX Planning Instructions

Before you begin filling out the forms that follow, take a moment to plan out how your Virtual PBX will function. Descriptions of the different PBX options are listed below, and a drawn example of a Virtual PBX is also included on the following page.

### **Extensions**

Extensions can be dialed at any time within the Virtual PBX to send the caller directly to the desired person or group. Each extension can have multiple numbers defined for it to hunt through for as many rings as you choose, until the call is answered. If the call is not answered by any of the numbers defined, you can choose to send the call someplace else, or to the extension's voice mail box. Extensions can be 3 - 9 digits long, but all extensions within a Virtual PBX must be the same length.

### **Menus**

All calls are sent to the Main Menu first and branch out from there depending on what menu digit is pressed or if an extension is dialed. You can assign an action to menu digits 1-9, and also the \* and # keys. (Such as press 1 for sales, 2 for customer service, 3 for tech support, or press the # key to repeat this menu).

### **Hunt Groups**

Extensions already have the ability to hunt through a list of numbers until a call is answered. If you require a more complex type of hunting such as Call Distribution where calls are distributed equally among a list of numbers, you can set up a hunt group. Hunt groups are set up by logging into your normal Kall8 account, and clicking on the Hunt Group option located near the bottom of the left hand column of the Account Main screen under 'Features & Services'. Once a hunt group is set up, you will be able to send calls to it from your Virtual PBX.

### **Call Recording**

Virtual PBX calls can be recorded for quality assurance, training, and/or purchase verification purposes. To set up call recording, log into your normal Kall8 account, and click on the call recording tab at the top of the screen.

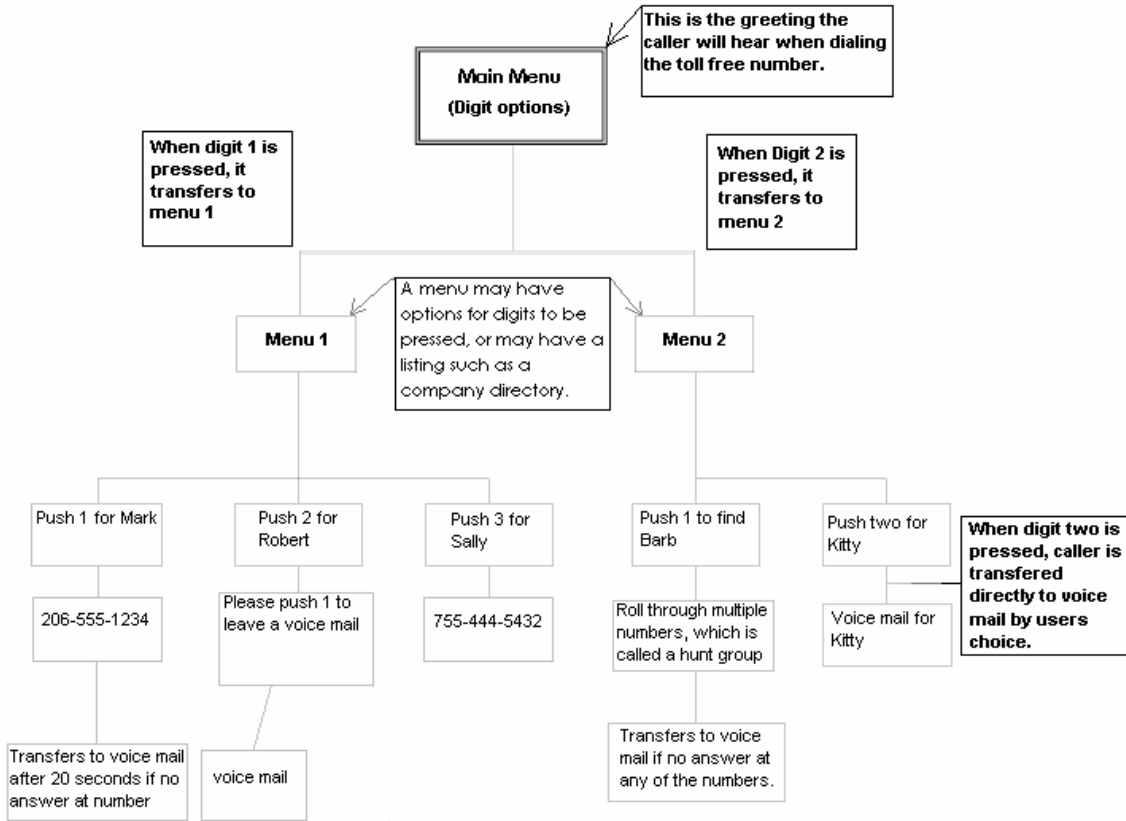
### **Voice Mail**

**Main PBX Voice Mail:** Each PBX has a global Voice Mail box that calls can be sent to from any menu or extension. You can choose to have these Voice Mails sent to an email address, listen to them on the website, or listen to them over the phone using the administrator's 4-digit password.

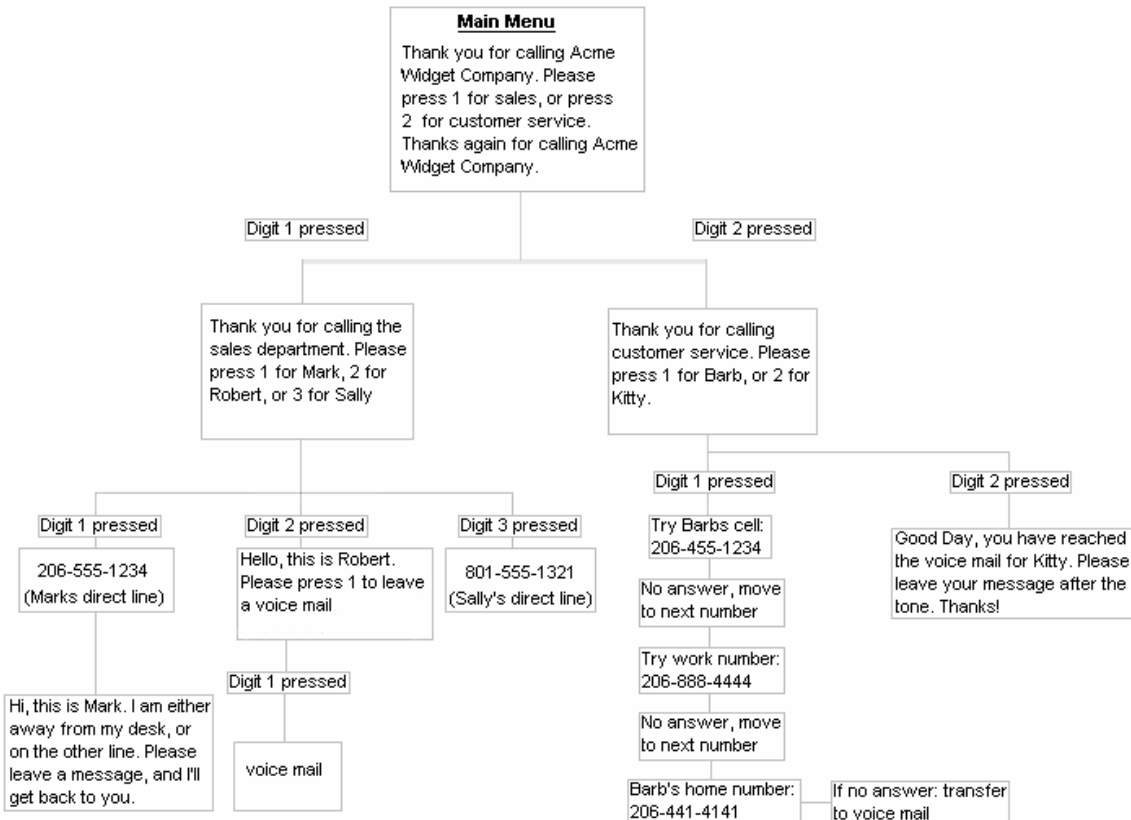
**Extension Voicemail:** Each extension also has the option to have it's own Voice Mail box. A different email address and 4-digit password can be defined for each extension so that each person can retrieve their own voice mail.

- A Virtual PBX is limited to 3 menus and 25 extensions. If you require more menus and extensions, please contact customer service at 1-866-222-1818 for special pricing.

# Virtual PBX Example



**Below you will find a working example of the technical layout above**



# Worksheet for Virtual PBX Programming

Before we can set up a Virtual PBX for you, you will need to have a Kall8 account. If you do not have a Kall8 account, please return to the home page at [www.kall8.com](http://www.kall8.com) and sign up for an account.

\*\*\*Rates: There is a one-time \$50 setup fee and a \$25 monthly fee per Virtual PBX.

What would you like to name your Virtual PBX: \_\_\_\_\_

What Kall8 Number(s) will forward to this Virtual PBX? \_\_\_\_\_

\_\_\_\_\_

Contact person coordinating PBX Planning: \_\_\_\_\_

Contact Phone: \_\_\_\_\_ E-mail Address: \_\_\_\_\_

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## **PBX Voice Mail**

Enter the 4-digit administrator password and email address to use for retrieving your PBX's Voice Mail:

4-Digit Administrator Password: \_\_\_\_\_ Email Address: \_\_\_\_\_

## **Hours of Operation:**

Will your PBX be active 24hours/day, 7 days a week?     Yes     No

If not, please list your hours of operation:

Monday      From \_\_\_\_\_ To \_\_\_\_\_ Notes? \_\_\_\_\_

Tuesday      From \_\_\_\_\_ To \_\_\_\_\_ Notes? \_\_\_\_\_

Wednesday      From \_\_\_\_\_ To \_\_\_\_\_ Notes? \_\_\_\_\_

Thursday      From \_\_\_\_\_ To \_\_\_\_\_ Notes? \_\_\_\_\_

Friday      From \_\_\_\_\_ To \_\_\_\_\_ Notes? \_\_\_\_\_

Saturday      From \_\_\_\_\_ To \_\_\_\_\_ Notes? \_\_\_\_\_

Sunday      From \_\_\_\_\_ To \_\_\_\_\_ Notes? \_\_\_\_\_

Time Zone in which Virtual PBX(s) will be operating (Choose One):

Eastern     Central     Mountain     Pacific     Other \_\_\_\_\_

## EXTENSIONS

### GLOBAL SETTINGS

How many digits long will your extensions be? \_\_\_\_\_ (3 or 4 digits is recommended)

When dialing an extension, callers will hear:  Music  Ringing  Please Hold Message, then Music

**Common Extension Digit:** All extensions should begin with the same digit. Please select your common extension digit \_\_\_\_\_ (A digit between 5-9 is recommended)

**EXTENSION NUMBER:** \_\_\_\_ \_\_\_\_\_ (write in the common extension digit first)

**Extension/User Name:** \_\_\_\_\_ **Email Address:** \_\_\_\_\_

<b>PHONE NUMBERS</b>	<b>TIMEOUT SETTING</b>
<p>Enter a list of numbers for the PBX to hunt through, or leave blank to go immediately to the timeout setting to the right.</p> <p><b>Phone Number 1:</b> _____ for _____ Rings</p> <p><b>Phone Number 2:</b> _____ for _____ Rings</p> <p><b>Phone Number 3:</b> _____ for _____ Rings</p> <p><b>Phone Number 4:</b> _____ for _____ Rings</p> <p><b>Phone Number 5:</b> _____ for _____ Rings</p>	<p>If the call is not answered, send to:</p> <p><input type="checkbox"/> This Ext.'s Voice Mail</p> <p><input type="checkbox"/> To another Ext. # _____</p> <p><input type="checkbox"/> Another Ext.'s Voice Mail # _____</p> <p><input type="checkbox"/> To the Main PBX Voice Mail</p> <p><input type="checkbox"/> To Menu # _____</p> <p><input type="checkbox"/> To Hunt Group _____</p> <p><input type="checkbox"/> Disconnect Call</p>

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**EXTENSION NUMBER:** \_\_\_\_ \_\_\_\_\_ (write in the common extension digit first)

**Extension/User Name:** \_\_\_\_\_ **Email Address:** \_\_\_\_\_

<b>PHONE NUMBERS</b>	<b>TIMEOUT SETTING</b>
<p>Enter a list of numbers for the PBX to hunt through, or leave blank to go immediately to the timeout setting to the right.</p> <p><b>Phone Number 1:</b> _____ for _____ Rings</p> <p><b>Phone Number 2:</b> _____ for _____ Rings</p> <p><b>Phone Number 3:</b> _____ for _____ Rings</p> <p><b>Phone Number 4:</b> _____ for _____ Rings</p> <p><b>Phone Number 5:</b> _____ for _____ Rings</p>	<p>If the call is not answered, send to:</p> <p><input type="checkbox"/> This Ext.'s Voice Mail</p> <p><input type="checkbox"/> To another Ext. # _____</p> <p><input type="checkbox"/> Another Ext.'s Voice Mail # _____</p> <p><input type="checkbox"/> To the Main PBX Voice Mail</p> <p><input type="checkbox"/> To Menu # _____</p> <p><input type="checkbox"/> To Hunt Group _____</p> <p><input type="checkbox"/> Disconnect Call</p>

## EXTENSIONS (additional pages)

Print out additional copies of this page if you have more extensions than the four provided in this packet.

**EXTENSION NUMBER:** \_\_\_\_ (write in the common extension digit first)

**Extension/User Name:** \_\_\_\_\_ **Email Address:** \_\_\_\_\_

<b>PHONE NUMBERS</b>	<b>TIMEOUT SETTING</b>
<p>Enter a list of numbers for the PBX to hunt through, or leave blank to go immediately to the timeout setting to the right.</p> <p><b>Phone Number 1:</b> _____ for ____ Rings</p> <p><b>Phone Number 2:</b> _____ for ____ Rings</p> <p><b>Phone Number 3:</b> _____ for ____ Rings</p> <p><b>Phone Number 4:</b> _____ for ____ Rings</p> <p><b>Phone Number 5:</b> _____ for ____ Rings</p>	<p>If the call is not answered, send to:</p> <p><input type="checkbox"/> This Ext.'s Voice Mail</p> <p><input type="checkbox"/> To another Ext. # _____</p> <p><input type="checkbox"/> Another Ext.'s Voice Mail # _____</p> <p><input type="checkbox"/> To the Main PBX Voice Mail</p> <p><input type="checkbox"/> To Menu # _____</p> <p><input type="checkbox"/> To Hunt Group _____</p> <p><input type="checkbox"/> Disconnect Call</p>

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**EXTENSION NUMBER:** \_\_\_\_ (write in the common extension digit first)

**Extension/User Name:** \_\_\_\_\_ **Email Address:** \_\_\_\_\_

<b>PHONE NUMBERS</b>	<b>TIMEOUT SETTING</b>
<p>Enter a list of numbers for the PBX to hunt through, or leave blank to go immediately to the timeout setting to the right.</p> <p><b>Phone Number 1:</b> _____ for ____ Rings</p> <p><b>Phone Number 2:</b> _____ for ____ Rings</p> <p><b>Phone Number 3:</b> _____ for ____ Rings</p> <p><b>Phone Number 4:</b> _____ for ____ Rings</p> <p><b>Phone Number 5:</b> _____ for ____ Rings</p>	<p>If the call is not answered, send to:</p> <p><input type="checkbox"/> This Ext.'s Voice Mail</p> <p><input type="checkbox"/> To another Ext. # _____</p> <p><input type="checkbox"/> Another Ext.'s Voice Mail # _____</p> <p><input type="checkbox"/> To the Main PBX Voice Mail</p> <p><input type="checkbox"/> To Menu # _____</p> <p><input type="checkbox"/> To Hunt Group _____</p> <p><input type="checkbox"/> Disconnect Call</p>

## MAIN MENU (all calls are sent here first)

Initial Menu Greeting: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Enter an action for each menu digit that you would like to use. (Leave blank if you do not want to include the digit.)

MENU DIGITS:	AVAILABLE ACTIONS:
Digit 1: _____	<ul style="list-style-type: none"> <li>• Dial Phone a Number: _____</li> <li>• Transfer to an Extension #: _____</li> <li>• Transfer to a Menu #: _____</li> <li>• Transfer to PBX Voice Mail</li> <li>• Transfer to Extension # _____'s Voice Mail</li> <li>• Send to a Hunt Group (include list of numbers or hunt group name)</li> </ul> <p style="text-align: center;">-----</p> <p>If you would like to play a message before the action takes place, write <b>PLAY MSG</b> first, then the action from the list above.</p>
Digit 2: _____	
Digit 3: _____	
Digit 4: _____	
Digit 5: _____	
Digit 6: _____	
Digit 7: _____	
Digit 8: _____	
Digit 9: _____	
# Key: <u>Repeat Menu (default)</u>	
* Key: _____	

**If no digit is pressed:** Repeat Menu \_\_\_\_\_ Times, then send to:

- |   |                                       |   |
|---|---------------------------------------|---|
| <input type="checkbox"/> Main PBX Voice Mail      | <input type="checkbox"/> Menu # _____ | <input type="checkbox"/> Disconnect Call  |
| <input type="checkbox"/> Ext # _____'s Voice Mail | <input type="checkbox"/> Ext # _____  | <input type="checkbox"/> Hunt Group _____ |

### OPTIONAL MESSAGES

If you chose the **PLAY MSG** option to take place before an action, please enter your message text below:

Optional Message 1: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Optional Message 2: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## MENU1 (optional)

Initial Menu Greeting: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Enter an action for each menu digit that you would like to use. (Leave blank if you do not want to include the digit.)

MENU DIGITS:	AVAILABLE ACTIONS:
Digit 1: _____	• Dial Phone a Number: _____
Digit 2: _____	• Transfer to an Extension #: _____
Digit 3: _____	• Transfer to a Menu #: _____
Digit 4: _____	• Transfer to PBX Voice Mail
Digit 5: _____	• Transfer to Extension # _____'s Voice Mail
Digit 6: _____	• Send to a Hunt Group (include list of numbers or hunt group name)
Digit 7: _____	-----
Digit 8: _____	If you would like to play a message before the action takes place, write <b>PLAY MSG</b> first, then the action from the list above.
Digit 9: _____	
# Key: <u>Repeat Menu (default)</u>	
* Key: _____	

**If no digit is pressed:** Repeat Menu \_\_\_\_\_ Times, then send to:

- Main PBX Voice Mail       Menu # \_\_\_\_\_       Disconnect Call
- Ext # \_\_\_\_\_'s Voice Mail       Ext # \_\_\_\_\_       Hunt Group \_\_\_\_\_

### **OPTIONAL MESSAGES**

If you chose the **PLAY MSG** option to take place before an action, please enter your message text below:

Optional Message 1: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Optional Message 2: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## MENU2 (optional)

Initial Menu Greeting: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Enter an action for each menu digit that you would like to use. (Leave blank if you do not want to include the digit.)

MENU DIGITS:	AVAILABLE ACTIONS:
Digit 1: _____	• Dial Phone a Number: _____
Digit 2: _____	• Transfer to an Extension #: _____
Digit 3: _____	• Transfer to a Menu #: _____
Digit 4: _____	• Transfer to PBX Voice Mail
Digit 5: _____	• Transfer to Extension # _____'s Voice Mail
Digit 6: _____	• Send to a Hunt Group (include list of numbers or hunt group name)
Digit 7: _____	-----
Digit 8: _____	If you would like to play a message before the action takes place, write <b>PLAY MSG</b> first, then the action from the list above.
Digit 9: _____	
# Key: Repeat Menu (default) _____	
* Key: _____	

**If no digit is pressed: Repeat Menu \_\_\_\_\_ Times, then send to:**

- Main PBX Voice Mail       Menu # \_\_\_\_\_       Disconnect Call
- Ext # \_\_\_\_\_'s Voice Mail       Ext # \_\_\_\_\_       Hunt Group \_\_\_\_\_

### OPTIONAL MESSAGES

If you chose the **PLAY MSG** option to take place before an action, please enter your message text below:

Optional Message 1: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Optional Message 2: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_