

# Phone Terminal Setup

This page contains instructions on how to customize Phone terminal extension parameters.

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## Overview


The Phone Terminal extension is used to connect phone devices to the system.

After having defined the [general settings](#), you can start setting up the options specific to the phone terminal extension type. At the same time, you may skip this step and come back any time later on by clicking the [Phone terminal setup](#) icon available in the extension's management page.

In the sections below, you will find detailed information about options available for configuration in order to suit your needs.

## Basic settings

This section allows to set up CallerID related and extension on hold options for your Phone Terminal extension.


Option	Details
<b>Default music on hold folder</b>	<p>This folder contains the sound files that will be played in order when the caller is on hold or when the extension waits for an operation to be performed.</p> <p>Click the  icon to view the available folders. A pop-up window that allows you to select the desired default music on hold folder will be displayed. You can read more about the Music on Hold Manager in the <a href="#">Appendix</a>.</p>
<b>CallerID name in public calls</b>	<p>Customize the CallerID name shown on the callee's screen, when the extension is calling public destinations. If the receiving party supports CallerID, the following name is displayed:</p> <ul style="list-style-type: none"><li>• <b>Set by server:</b> The extension owner's contact name</li><li>• <b>Set by equipment:</b> The caller's name as set up from the phone terminal device</li><li>• <b>Set by user:</b> A custom ID, set by the user. By default, the text box contains the owner's contact name, but you can set the CallerID name to a custom alphanumeric value.</li></ul>
<b>CallerID number in public calls</b>	<p>Customize the CallerID number shown on the callee's screen, when the extension is calling public destinations. If the receiving party supports Caller ID, the following number is displayed:</p> <ul style="list-style-type: none"><li>• <b>Set by server:</b> The extension's public phone number</li><li>• <b>Set by equipment:</b> The phone number of the phone terminal device</li><li>• <b>Set by user:</b> A custom ID, set by the user. By default, the text box contains the extension's phone number, but you can set the CallerID number to a custom numeric value with three or more digits.</li></ul> <p>The system can send the CallerID name Set by server and the CallerID number Set by user or viceversa. No matter if you choose the Set by equipment or the Set by user, the Currently using CallerID numbers line will be disabled. You will not be able to select a CallerID to be associated with the extension's outgoing calls.</p>

<b>Currently using CallerID numbers</b>	<p>Choose one or several CallerID numbers to send when an outgoing call is initiated. The numbers available are the ones defined for the channel(s) (resource) used for routing the calls to public destinations. The custom text box displays the CallerID number(s) currently in use. the default number is displayed using bold characters.</p> <p>To add a CallerID number, click the <a href="#">Change</a> link and a pop-up window will be displayed allowing you to manage the CallerIDs. In order to be displayed in this list, the public phone number(s) defined for the channels (resources) used for routing the calls to public destinations must be assigned to the organization owning this extension. It is possible to assign CallerIDs associated with DIDs that are on the user pool, but that have not been assigned to any extension.</p> <p>Please note that a CallerID can be set as default even if it has not been assigned to the extension's DID pool.</p> <table border="1"> <thead> <tr> <th>Field</th><th>Description</th></tr> </thead> <tbody> <tr> <td><b>CallerID Number</b></td><td>The CallerID of the DID assigned to the user that owns this extension. It is the Caller ID number displayed by the callee's phone terminal upon receiving a call from this extension. Public phone numbers can be defined for a certain channel from the <b>Channels Channel &lt;channel_name&gt; management Add phone numbers</b> page. For more information, you may also check <a href="#">Manage Public Numbers</a> section.</td></tr> <tr> <td><b>User</b></td><td>The user to whom the number was assigned.</td></tr> <tr> <td><b>Rings Back to</b></td><td>The extension that rings the DID associated with this CallerID. If the CallerID was not assigned to the extension, then '-' is displayed. The public phone numbers can be assigned to the user from the <b>Roles and Phone Numbers for &lt;user_name&gt;</b> page. For more information see the <a href="#">Set Up User Roles</a> section.</td></tr> <tr> <td><b>Resource</b></td><td>The ID of the channel the public phone number was defined for.</td></tr> <tr> <td><b>Default</b></td><td>This area defines the CallerID's status. It can be Set as default if it is associated with the extension and if it is not the default CallerID. It can be set to Yes if the CallerID is associated with the extension and it is the default one. It can be set to - if the CallerID has not been associated with this extension and cannot be used for outgoing calls.</td></tr> </tbody> </table>	Field	Description	<b>CallerID Number</b>	The CallerID of the DID assigned to the user that owns this extension. It is the Caller ID number displayed by the callee's phone terminal upon receiving a call from this extension. Public phone numbers can be defined for a certain channel from the <b>Channels Channel &lt;channel_name&gt; management Add phone numbers</b> page. For more information, you may also check <a href="#">Manage Public Numbers</a> section.	<b>User</b>	The user to whom the number was assigned.	<b>Rings Back to</b>	The extension that rings the DID associated with this CallerID. If the CallerID was not assigned to the extension, then '-' is displayed. The public phone numbers can be assigned to the user from the <b>Roles and Phone Numbers for &lt;user_name&gt;</b> page. For more information see the <a href="#">Set Up User Roles</a> section.	<b>Resource</b>	The ID of the channel the public phone number was defined for.	<b>Default</b>	This area defines the CallerID's status. It can be Set as default if it is associated with the extension and if it is not the default CallerID. It can be set to Yes if the CallerID is associated with the extension and it is the default one. It can be set to - if the CallerID has not been associated with this extension and cannot be used for outgoing calls.
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	<p>To <b>associate</b> a CallerID with the extension, you need to select the corresponding checkbox and click the <a href="#">Assign CallerIDs</a> link. To <b>disassociate</b> a CallerID, you need to select the corresponding checkbox and click the <a href="#">Remove selected</a> link.</p> <p>1. If you have selected more than one CallerIDs for a resource (channel), the system will send a random one to the public destination. Let us assume that the outgoing calls are routed through a resource (channel), Resource #1, for which three public phone numbers have been defined and assigned to the user's organization: 1123, 345876 and 2854478. If you associate all three of them with the extension and initiate an outgoing call, the callee's phone terminal will display one of the three numbers (if it supports the CallerID function).</p> <p>2. If you have selected CallerIDs for more than one resource (channel), the system will send the CallerID of the resource that routes the call. Let us assume that the outgoing calls are routed through Resource #1, for which one public number has been defined and assigned to the user's organization: 2255. You associate this number with the user plus another one, 6987560, defined for Resource #2. If you initiate an outgoing call, the callee's phone terminal will display 2255 (if it supports the CallerID function).</p> <p>3. If calls are routed through a resource that does not have a public phone number assigned and you have a CallerID that belongs to another resource set as default, the system will send the default CallerID. Let us assume that the outgoing calls are routed through a resource (channel), Resource #1, for which no public phone numbers have been defined. Your default CallerID is set to 3689, which belongs to another resource (channel), Resource #2. If you initiate an outgoing call, the callee's phone terminal will display 3689 (if it supports the CallerID function).</p>												
<b>Do not send CallerID on public calls</b>	Applies if you do not want your CallerID to be sent to public destinations. If the callee's phone terminal supports the CallerID function, it will display the Anonymous string.												
<b>Send public CallerID on internal calls</b>	Applies if you want the public CallerID (when available) to be used for local and extended local calls as well. It allows the association between the CallerID of the Phone terminal user and an existing card code defined for the same CallerID.												
<b>Preserve original CallerID on transferred calls</b>	Applies if you want VoipNow to keep the original CallerID when the call is forwarded between destinations.												
<b>Send SIP P-Asserted-Identity and P-Preferred-Identity headers</b>	Allows the headers to be added to all outgoing INVITE requests sent from this extension. The SIP P-Asserted-Identity header contains the caller ID number of the extension, e.g. P-Asserted-Identity: sip:0003*003@localhost.localdomain. The P-Preferred-Identity header is sometimes used to indicate an additional identity of preference when there is a choice. These headers are preserved only on outgoing external calls, e.g. P-Preferred-Identity: "John White" <sip:johnny@somedomain.org>.												

<b>Hangup when extension does not answer in &lt;x&gt; seconds</b>	Refers to the time interval a call is allowed to ring before being terminated by the VoipNow system. Default: 30 seconds.
<b>Do not keep calls in parking lots for more than &lt;x&gt; seconds</b>	Refers the time interval a call is allowed to remain in the parking lot before being transferred back to the extension that parked the call. Default: 180 seconds.


## Calling features

- **Call waiting active:** Allows the user to answer multiple calls using the phone's call waiting features. Calls are not rejected when the extension is busy.
- **Do not disturb function active:** Gets calls rejected and a custom sound file played to the callers trying to contact the extension.
- **Play sound <file\_name> when DND is activated:** Enable if you want a sound to be played to the callers trying to contact the extension while the

**Do not disturb function active** is enabled. Click the  icon to view the available sound files or manually fill in the file location. A popup window listing all the sounds matching the name specified in the text box will be displayed. You can read more about the Sound Manager in the [Appendix](#).

## Voicemail

This feature allows callers to leave voice messages when the extension is unavailable or busy.

Option	Details
<b>Enable voicemail</b>	Allows the extension to use the Voicemail function. Enabling the Voicemail recording will allow you to manage the extension's voicemails sharing by editing its <b>Roles and phone numbers</b> . For more details, see the <a href="#">Add Extension</a> section.
<b>Auto delete messages older than &lt;x&gt; days</b>	Specify after how many days all messages will be auto-deleted. Accepted values: from 1 to 999.
<b>New message notification</b>	Choose the action that VoipNow will perform when the extension receives a new voicemail message: <ul style="list-style-type: none"> <li>• <b>Send alert email:</b> Allows the extension owner to receive an email notifying them about a new voicemail message.</li> <li>• <b>Send message by email:</b> Allows the extension owner to receive the new voicemail message file by email.</li> </ul>
<b>Voicemail password</b>	The password requested when the mailbox is accessed over the phone. If you do not set a password for the voice mailbox, the extension owner will not be able to access their mailbox over the phone. However, the owner will still be able to manage the voice mailbox through the VoipNow interface.
<b>Voicemail automatically answers after &lt;x&gt; seconds</b>	If enabled and the extension user does not answer in <x> seconds, the call will be transferred to <b>Voicemail</b> .
<b>Exit to operator on key press</b>	With a simple press on 0, this option allows the caller to exit Voicemail and connect to an Operator, i.e. another extension available to take the call. This option is suitable for callers who do not want to leave a voicemail message and would rather have their call taken over by an Operator.  To set an Operator, click the  icon and select an extension of your choice from the list. Please note that the extension can function as an Operator if the user it belongs to is multiuser aware.
<b>Add extension to company directory</b>	Adds the extension to the list containing the company's extension numbers.  The company directory has a functionality similar to a phone agenda and can be accessed either directly from the keypad by dialing *22 or by using a specially designed IVR action called <b>Play company directory</b> .  It can be used if you want to call a certain user, but you do not know his extension number. You are asked for the name you are looking for. The user's full name and his extension is played and you are redirected to him. Please read the <a href="#">Phone Quick Setup Guide</a> for more information.  Also, please note that it is recommended for users to register only one extension in the company directory, the extension they wish to be contacted on.
<b>Do not read message envelope when accessing the mailbox over the phone</b>	If this checkbox is selected, the user will no longer hear voicemail message details such its position, the date and time the message was received, the Caller ID information, the duration of the message.

## Conference settings


This feature allows more than two extension owners to take part in the same phone conversation.

The **Conference** function is only available for extensions that belong to users with an enabled **User is multi-user aware** permission.

Option	Details
<b>Conference function enabled</b>	When enabled, this option allows the extension to create and join conference calls.
<b>Conference room size</b>	Set the maximum number of users that can join the conversation; between 2 and 99.
<b>Timeout on empty conference room &lt;x&gt; seconds</b>	Set the timeout before the conference ends (in case there are no participants left); between 1 and 9,999; If the conference is scheduled to close when all moderators exit, this option will be ignored.
<b>Enable music on hold</b>	When enabled, this option allows VoipNow to play the files located in the <b>Default music on hold</b> folder if there is only one user present in the conference.
<b>Prompt for PIN on conference creation</b>	When enabled, VoipNow asks the conference creator to set a password; all the users that join the conference have to dial this password in order to access the conference.
<b>Close the conference when all conference moderators exit</b>	When enabled, VoipNow terminates all the calls the moment all conference moderators exit the conference.
<b>Announce user count on joining conference</b>	When enabled, VoipNow announces any new participant about the number of users present in the conference call.
<b>Announce users joining/leaving</b>	When enabled, VoipNow announces the users about any participant joining or leaving the conference call.


## Fax center

This feature allows the extension to receive faxes and manage them by using the extension account.

Option	Details
<b>Enable fax center</b>	When enabled, allows the extension to receive faxes. Whenever a fax message is received, VoipNow saves it to a file on the system. The extension's owner will be able to retrieve it at any point later on. Enabling the fax center will allow you to manage the extension's fax messages in the <a href="#">Fax Center</a> section.
<b>Play sound &lt;sound&gt; before sending fax</b>	Select if you want to choose a sound that will be played before a fax message is sent.  Click the  icon to view the available sound files or manually fill in the file location. A popup window listing all the sounds matching the name specified in the text box will be displayed. You can read more about the Sound Manager in the <a href="#">Appendix</a> .
<b>Auto delete received faxes older than &lt;x&gt; days</b>	Specify after how many days all received faxes will be auto deleted. Between 1 and 999.
<b>New received fax notification</b>	Choose the action that will be performed by VoipNow when the extension receives a new fax message: <ul style="list-style-type: none"><li>• <b>Send alert email:</b> When enabled, the extension owner receives an email notifying them about a new fax message.</li><li>• <b>Send fax by email:</b> When enabled, the extension owner receives the new fax message file by email.</li></ul>
<b>Fax automatically answers after &lt;x&gt; seconds</b>	If the extension user does not answer in <x> seconds, the server will try to answer in order to detect a fax.
<b>If not a fax, send to voicemail</b>	When enabled, in case the call is not a fax, the server will transfer the call to the extension's voicemail; otherwise, the system will answer with a fax tone.

## Call recording

This feature allows the user to record phone conversations.

- **Call recording function enabled:** When enabled, allows the user to use the call recording functions on this extension. Click the  icon to view the available sound files or manually fill in the file location. A popup window listing all the sounds matching the name specified in the text box will be displayed. You can read more about **Sound Manager** in the [Appendix](#).
- **Record triggered:** Specify when and how call recording will be triggered:
  - **Never** - Although the call recording feature is enabled, it is not used.
  - **Only conferences** - if enabled, VoipNow will record only conference conversations; this option is available only if Conference feature is enabled.
  - **When \*1 is pressed** - if enabled, the user will be able to start the recording of a conversation by dialing \*1 on their phone pad.
  - **All calls are recorded** - if enabled, VoipNow will record all the conversations of the extension.

- **Play sound <sound> when call recording starts:** When enabled, VoipNow will play the sound each time a recording operation starts.
- **Auto delete recordings older than <X> days:** Specify after how many days all messages will be auto-deleted. Accepted values: from 1 to 999.

## Password protection

This feature allows the extension user to block the access to the phone terminal for a certain period of time. The terminal can be blocked or activated from its keypad by dialing the password set in this section. A blocked phone terminal cannot be used for placing or receiving calls. If the **Voicemail** feature is enabled, then all incoming calls will be redirected to voicemail while the phone terminal is blocked.

- **Protected phone access active:** Select this checkbox if you want to enable the **Password Protection** feature for this extension. After enabling this feature and defining the required password, the **Currently access to phone is unrestricted** message will be displayed next to the checkbox.
  - Click the [Block](#) link to restrict the phone terminal usage. If access is restricted, the **Currently access to phone is blocked** message will be displayed.
  - Click the [Unblock](#) link to allow the extension user to dial/receive calls normally.
- **Old access password:** This line is displayed only when editing the extension's settings and if a password has been previously defined for the **Password Protection** feature.
- **Password to access telephony:** Specify the password the user will have to dial in order to block/activate the access to their phone terminal. The password must be a number between 3 and 12 digits in length. If this feature is enabled and the user want to block/activate the phone terminal, from the terminal keypad they must dial \*11 then the password defined in this section.

To define the behavior of the extension for the case when the user cannot answer a call, you must take into account the following parameters:



- **Consider 'No answer' after <no answer> seconds**
- **Voicemail automatically answers after <voicemail answer> seconds**
- **Fax automatically answers after <fax answer> seconds**
- **If not a fax, send to voicemail**

For a correct behavior, it is recommended that you comply with the following configuration:

- **<no answer> <voicemail answer> <fax answer>.**
- **If not a fax, send to voicemail** checkbox selected.

## Extension virtualization

By virtualization, an extension can be moved to a phone device currently attached to a different extension that is part of the same organization and supports virtualization.

- **Set secret code [ ]:** A numeric code of 4-8 digits, which enables the extension to be moved to any phone device tied to any extension within the same organization that allows virtualization. The code must be kept secret. Once this code is set, the label will change to **Replace secret code**.
- **Existing secret code:** Displayed only if such a code has been previously set.
- **Currently virtualized on <BaseExtension> Return to Base:** Displayed only if this extension is virtualized.
  - **<BaseExtension>** - Stands for the extended number of the base extension where the extension is virtualized.
  - **Return to base** - A link that triggers the return to base of the virtualized extension.

Related topics

[Phone terminal provisioning](#)

[Phone terminal voicemail](#)

[Phone terminal fax](#)

[Conference extension](#)

[How to virtualize an extension](#)