

# Setting the Phone Terminal Extension

This page describes how to create and configure a Phone Terminal Extension.

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## Overview

A phone terminal is a SIP phone connected to the 4PSA VoipNow server using the network.

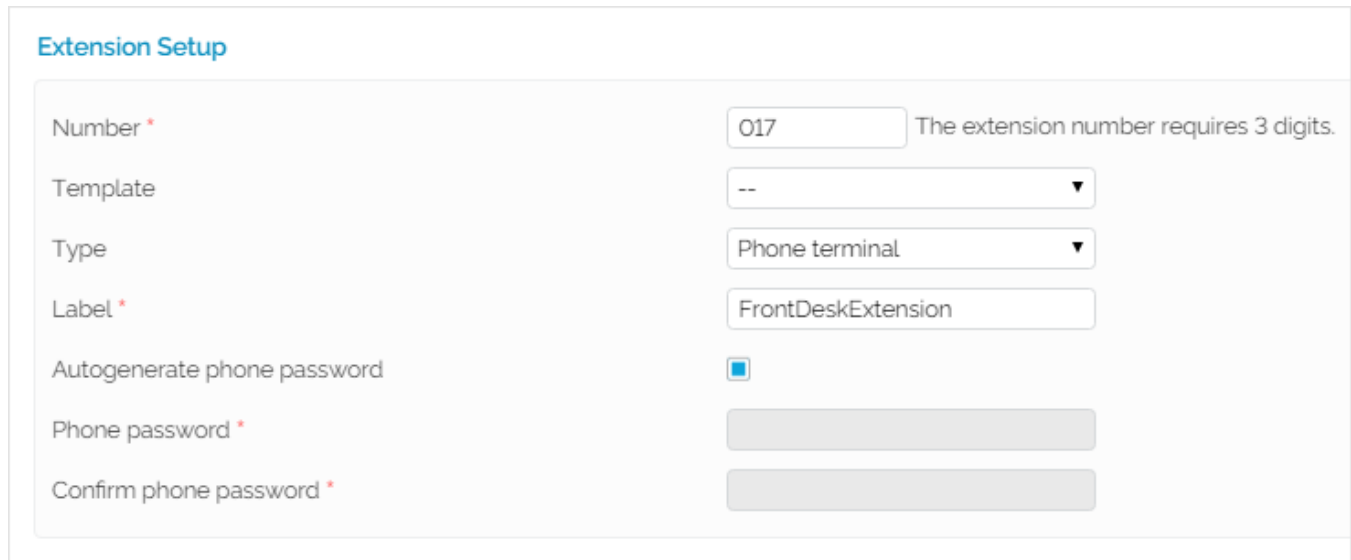
By default, after filling in the extension's [basic information](#), you can start setting up the options specific to type of extension you have chosen. If you do not want to finalize the process now, you may skip this step and come back any time later on. Just click the [Phone Terminal Setup](#) icon available in the extension's management page.

In case you need to automatically configure SIP devices associated to a Phone Terminal extension, the [SIP Preferences](#) section offers a detailed description of the process. In the sections below, you will find detailed information about extension options that you can configure according to your needs.

## Basic settings

The system can send the **CallerID name** [set by server](#) and the **CallerID number** [set by user](#) or vice-versa.

If you choose either the [Set by equipment](#) or the [Set by user](#) options, 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.



Screenshot: Extension Form

- **Default Music on Hold Folder:** This folder contains the sound files that will be played in turn whenever the caller is on hold or the extension waits for an operation to be performed. Click the icon to view the folders available. A pop-up window allowing you to select the desired default music on hold folder will be displayed. Click the folder name link to view the music on hold files:
  - **Listen:** Use the available controls to listen to the message; the total length of the sound will be displayed as well using the `hh:mm:ss` format.
  - **Sounds inside folder <path>:** The sound files available in the chosen folder. The path will display the folder name and also its origin. "/" placed before the name of a folder signals the current account's default folder. For every "/" added, you go up an account level.
- **CallerID Name in Public Calls:** You have three options to customize the CallerID name that will be displayed on the callee's screen when the extension is calling public destinations:
  - **Set by server:** If it supports the CallerID function, the callee's phone terminal will display the extension owner's Contact name.
  - **Set by equipment:** - If it supports the CallerID function, the callee's phone terminal will display the caller's name as set up from the phone terminal device.
  - **Set by user:** If enabled, a text box will be displayed allowing you to set the CallerID name to a custom alphanumeric value. If the CallerID function is supported, the value defined here will be displayed by the callee's phone terminal. By default, the text box contains the extension's **Contact name**.

- **CallerID Number in Public Calls:** You have three options to customize the CallerID number that will be displayed on the callee's screen when the extension is calling public destinations:
  - **Set by server:** If it supports the CallerID function, the callee's phone terminal will display the extension's public phone number.
  - **Set by equipment:** If it supports the CallerID function, the callee's phone terminal will display the phone number of that particular phone terminal device.
  - **Set by user:** If enabled, a text box will be displayed allowing you to set the CallerID number to a custom numeric value with three or more digits.  
If the CallerID function is supported, the value defined here will be displayed by the callee's phone terminal. By default, the text box contains the extension's phone number.
- **Currently Using CallerID Numbers:** Choose one or several CallerID numbers that will be sent when an outgoing call is initiated. The available numbers 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. To add a CallerID number, click the [Change](#) link and a pop-up window will be displayed allowing you to manage the CallerIDs. Please read the [Public Phone Numbers](#) section below, for more information.
- **Do Not Send CallerID on Public Calls:** Select if you do not want your CallerID to be sent to public destinations. If it supports the CallerID function, the callee's phone terminal will display the `Anonymous` string.
- **Send Public CallerID on Internal Calls:** Enable if you want the public CallerID (when available), to be used for local and extended local calls as well. When enabled, this option allows the association between the Phone terminal user's CallerID and an existing card code defined for the same CallerID.
- **Preserve Original CallerID on Transferred Calls:** Enable this option if you want VoipNow to keep the original CallerID when the call is forwarded between destinations.
- **Send SIP P-Asserted-Identity Header:** When enabled, a header is added to all outgoing INVITE requests sent from this extension. The header contains the extension's caller ID number. e.g. P-Asserted-Identity: `sip:0003*003@localhost.localdomain`.
- **Hangup When Extension Does Not Answer in <x> Seconds:** Define the time interval a call is allowed to ring before being terminated by the VoipNow server. Default: 30 seconds.
- **Do Not Keep Calls in Parking Lots for More than <x> Seconds:** Define 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.

## Set public phone numbers

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 client that owns this extension.

It is possible to assign CallerIDs associated with DIDs that are on the client pool, but they cannot be already assigned to any extension.

Select a CallerID Number from the Pool

Search
Show All
Remove Selected
Assign CallerIDs

CallerID Number	User	Rings Back to ^	Resource	Default	
1-23321	James Prad	ext_001 (001)	Resource #14	-	<input type="checkbox"/>
234-234-32476	Tom Wilkinson	ext_014 (014)	Resource #3	-	<input type="checkbox"/>
6756-756-75567	Diane Stein	ext_001 (001)	Resource #3	-	<input type="checkbox"/>
6-68116	Fabio Ranieri	ext_002 (002)	Resource #14	-	<input type="checkbox"/>
1111	Dominique Brown	ext_004 (004)	Resource #2	-	<input type="checkbox"/>
1-01010	Polly Swans	ext_004 (004)	Resource #14	-	<input type="checkbox"/>
3-453-45345	Adam Nielson	ext_005 (005)	Resource #5	-	<input type="checkbox"/>
8-98989	Sam Mitchels	ext_028 (028)	Resource #14	-	<input type="checkbox"/>

8 phone number(s)
Number of entries per page: 10 25 100

Screenshot: Public Phone Numbers Selection Pop-Up

- **CallerID number:** The CallerID of the DID assigned to the client that owns this extension. It is the Caller ID number displayed by the callee's phone terminal when receiving a call from this extension. Public phone numbers can be defined for a certain channel from the **Channels Channel <channel\_name> management Add public phone numbers to channel <channel\_name>** page. For more info, you may also check the [Add Public Phone Numbers](#) section.
- **Rings back to:** 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 extension from the **Roles and Phone Numbers for Extension <extension\_name>** page.
- **Resource:** The ID of the channel the public phone number was defined for.
- **Default:** This area defines the CallerID's status. A CallerID can be set as default even if it has not been assigned to the extension's DID pool!
  - 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.

## Associate CallerID

To associate a CallerID with the extension, select the corresponding check box(es). Click the [Assign CallerIDs](#) link.

## Dissociate CallerID

To disassociate a CallerID, select the corresponding check box(es). Click the [Remove selected](#) link. You will be asked to confirm the action.

## Associate several CallerIDs

Keep in mind the following:


- If you have selected more than one CallerIDs for a resource (channel), then the system will send a random one to the public destination.  
**Example:** 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 client that owns the extension: `1123`, `345876` and `2854478`. If you associate all three of them with the extension, when initiating an outgoing call, the callee's phone terminal will display, if it supports the CallerID function, one of the three numbers.
- If you have selected CallerIDs for more than one resource (channel), then the system will send the CallerID of the resource that routes the call.  
**Example:** Let us assume that the outgoing calls are routed through `Resource #1`, for which one public number has been defined and assigned to the client who owns the extension: `2255`. You associate this number with the extension and another one, `6987560`, defined for `Resource #2`. If it supports the CallerID function, when initiating an outgoing call, the callee's phone terminal will display `2255`.
- 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, then the system will send the default CallerID.  
**Example:** 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 it supports the CallerID function, when initiating an outgoing call, the callee's phone terminal will display `3689`.

## Calling features

- **Call Waiting Active:** Calls are not rejected when the extension is busy. When enabled, this option will allow the user to answer multiple calls using the phone's call waiting features.
- **Do Not Disturb Function Active:** When enabled, this option will have 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 is enabled. Click the icon to view the available sound files or manually fill in the file's location. A pop-up window listing all the sounds matching the name specified in the text box will be displayed.
  - **Listen:** Use the available controls to listen to the message; the sound's total length is displayed as well using the `hh:mm:ss` format. If you want to download the sound on your hard drive, click the [Download](#) icon and confirm your choice.
  - **Name:** The name of the sound file. Click the link to select it.
  - **Folder:** This column displays the file's folder location. The path will display the folder name and also its origin. "/" placed before the name of a folder signals the current account's default folder. For every "/" added, you go up an account level.

## Voicemail

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

- **Enable Voicemail:** 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 Roles and phone numbers.
- **Mailbox Storage Space:** The space limit allowed for the mailbox. Specify the number of Mb that the mailbox should not exceed. If you do not want to set a size limit, select the Unlimited checkbox.
- **Auto Delete Messages Older than <x> Days:** Specify after how many days all messages will be auto-deleted. Between 1 and 999.
- **New Message Notification:** Choose the action that VoipNow will perform when the extension receives a new voicemail message:
  - **Send alert email** - Allows the extension owner to receive an email notifying them about a new voicemail message.
  - **Send message by email** - Allows the extension owner to receive the new voicemail message file by email.
- **Voicemail Password:** 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.
- **Voicemail Automatically Answers After <x> Seconds:** If enabled and the extension user does not answer in <x> seconds, the call will be transferred to Voicemail.
- **Exit to operator on key press:** 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 only extensions with an enabled multiuser aware permission can function as Operators.
- **Add Extension to Company Directory:** Add 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 **Play company directory**; It can be used if you want to call a certain extension, but you do not know its number; you will be asked for the name you are looking for and all the numbers matching that key combination will be played. It is not mandatory to add the extension to the company directory. Therefore, have in mind that the extension's number will not be returned as a search result when someone is looking for it if you did not previously add it to the list.

## Conference settings

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

- **Conference Function Enabled:** Allows the extension to create and join conference calls.
- **Conference Room Size:** Set the maximum number of users that can join the conversation; You can fill in any number between 2 and 99.
- **Timeout on Empty Conference Room <seconds> Seconds:** Set the timeout before the conference ends (in case there are no participants left); You can fill in any number between 1 and 9,999; If the conference is scheduled to close when all moderators exit, this option will be ignored.
- **Enable Music on Hold:** Allows VoipNow to play the files located in the Default music on hold folder if there is only one user present in the conference.
- **Prompt for PIN on Conference Creation:** The conference creator is asked to set a password; all the users that join the conference have to dial this password in order to access the conference.
- **Close the Conference when all Conference Moderators Exit:** All the calls are terminated the moment all conference moderators exit the conference.
- **Announce User Count on Joining Conference:** Any new participant is announced about the number of users present in the conference call.
- **Announce Users Joining/Leaving:** The users are announced about any participant joining or leaving the conference call.

The **Conference** function is strictly available for extensions with an enabled **Extension is multi user aware** permission.

## Fax center

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

- **Enable Fax Center:** Allows the extension to receive faxes. Whenever a fax message is received, VoipNow saves it to a file on the server. The extension user 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 sharing by editing its **Roles and phone numbers**.
- **Accept Faxes Sent by Email to:** The extension will accept faxes sent to the administrator's email address, made default at installation.
- **Accept Fax from Email:** Specify the email addresses from which the extension should accept fax messages. Use the minus/plus buttons to remove/add email addresses from the list. This option is not enabled unless the **Accept faxes sent by email** to checkbox has been previously selected.
- **Play Sound <sound> Before Sending Fax:** Choose a sound that will be played before a fax message is sent. Use the icon to view the sound files available or to manually fill in the file's location. A pop-up window will display all the sounds matching the name specified in the text box.
  - **Listen** - Use the available controls to listen to the message. The sound's total length will be displayed as well, using the hh:mm:ss format. If you want to download the sound on your hard drive, click the Download icon and confirm your choice.
  - **Name** - The name of the sound file. Click the link to select it.
  - **Folder** - This column displays the file's folder location. The path will display the folder name and also its origin. "/" placed before the name of a folder signals the current account's default folder. For every "/" added, you go up an account level.
- **Maximum Disk Space for Received faxes:** The space limit allowed for the storage of the received fax files. Specify the number of Mb that the fax files should not exceed; If you do not wish to set a size limit, select the Unlimited option.
- **Auto Delete Received Faxes Older than <x> Days:** Specify after how many days all received faxes will be auto deleted. Between 1 and 999.
- **New Received Fax Notification:** Choose the action that will be performed by VoipNow when the extension receives a new fax message:
  - **Send alert email** - the extension owner receives an email notifying them about a new fax message.
  - **Send fax by email** - the extension owner receives the new fax message file by email.
- **Fax Automatically Answers after <x> Seconds:** If the extension user does not answer in <x> seconds, the server will try to answer in order to detect a fax.
- **If Not a Fax, Send to Voicemail:** When this option is 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:** Allows the user to use the call recording functions. Enabling the call recording will allow you to manage sharing the extension's recordings by editing its **Roles and phone numbers**.
- **Call Recording Storage Space:** Specify the number of Mb that the recorded calls should not exceed. If you do not want to set a size limit, select the Unlimited option.
- **Record Triggered:** Use the options available to specify when and how call recording will be triggered:
  - **Never** - Although the call recording feature is enabled, it is not used.
  - **Only conferences** - VoipNow will record only conference conversations; this option is available only if Conference feature is enabled.
  - **When \*1 is pressed** - the user will be able to start the recording of a conversation by dialing \*1 on their phone pad.
  - **All calls are recorded** - 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. Use the icon to view the available sound files or manually fill in the file's location; A pop-up window will display all the sounds matching the name specified in the text box.
  - **Listen** - Use the available controls to listen to the message. The sound's total length is displayed as well, using the hours : minutes : seconds format. If you want to download the sound on your hard drive, click the Download icon and confirm your choice.
  - **Name** - The name of the sound file. Click the link to select it.
  - **Folder** - This column displays the file's folder location. The path will display the folder name and also its origin. "/" placed before the name of a folder signals the current account's default folder. For every "/" added, you go up an account level.

## 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:** Enable the **Password Protection** feature for this extension. After enabling this feature and defining the required password, the following message will be displayed next to the check box: Currently access to phone is unrestricted; 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 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.

Related topics

[Phone terminal setup](#)