My Hosted PBX Portal
User Guide
https://mypbx.primus.ca/

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BUSINESS SERVICES

Welcome to Primus Canada's Hosted PBX Portal (https://mypbx.primus.ca)!

This hands-on portal guide will lead you with, step-by-step instruction, through the innovative and beneficial features of your new Hosted PBX phone.

There are many features available to you through the My Hosted PBX Portal so let's get started!

Getting Started

Once you have successfully registered and logged in you are ready to begin exploring the features and functionalities of the **My Hosted PBX Portal**.

Within the portal are 6 tabs; Call Log, Directory, Voice Mail, Phone Control, Concierge and Options. We will review the features and functions of each tab beginning with Call Log.

Call Log Tab

Under the Call Log tab you can view all calls made from, and received on, your Hosted PBX phone. Additional features allow you to:

1. **Refresh:** Updates the portal with the most recent call details.
2. **Export Call Logs:** Call logs can be exported to an Excel document.
3. **Sort:** You can sort your call logs by Date/Time, Caller Name, Caller Number, or Duration.

4. **Reverse:** This function will reverse the order of the Sort function as described above.
5. **Function:** Options include deleting the call, call screen and add to directory.

Directory Tab

Under the directory tab you can add records from your call logs, input records manually and/or import your personal contacts from your mail client (currently Outlook Express is not supported).

- Adding a directory record from your call log is outlined in the image below.

- Importing a contact list from Outlook is outlined in the image below.

Click to upload your MS Outlook exported contacts. File must be in the Outlook CSV format.

Search your directory records by first or last name.

From within your Outlook application, create a CSV format export of your desired contacts. Browse and upload from your local exported Outlook file. Click on "Import Records" and your contacts will be imported. Optionally replace duplicates or append to My Hosted PBX portal directory.

Voice Mail Tab

Here you can view the details of your voice mail messages; the name and number of the caller, the date, the time and the duration of the voice mail message.

Scroll over icons to identify functionality.

Within this tab you have the option to listen to your voice mail, to archive the message, email the message as a wav attachment or to delete the voice mail. Additional features include:

- **Saved Messages:** This view shows all archived messages.
- **Delete All:** Allows you to delete all voice mails inclusively.
- **Notification and Options:** Use this link to personalize your voice mail notification options. Messages can be sent via email or to a pager.
- **Play-Back Options:** Select the order in which your voice mails are played.

Phone Control Tab

This feature will allow you to use the phone control to make a call without using the handset of the Hosted PBX phone.

Concierge Tab

Manage your incoming calls based on Caller ID, by time of day and time of week under the Concierge tab.

The Concierge function provides a flexible method of screening and forwarding calls anytime or at specific times and on certain days of the week.

Concierge Tab > Menu Bar > Call treatments

Available call treatments are outlined below:

- **Call Block:** Block this incoming number
- **Forward to Number:** Forward this call to another phone number
- **Forward to Voice mail:** Forward this call directly to voice mail
- **Find Me:** Select a Find-Me Follow-Me list that you have pre-defined
- **Priority Call:** Incoming call will be accepted even if Do Not Disturb (DND) is activated
- **Urgent Call:** Using this feature will identify the caller as "URGENT" in your call display
- **Virtual Ring:** You can route calls to an indefinite ring which will never receive your voice mail or ring your Hosted PBX phone
- **Forward when Busy:** If the call comes in while you are on the phone, you can forward the call to another number
- **Forward when no Answer:** If there is no answer, forward this call to another number

Call Log   **Directory**   **Voice Mail**   **Phone Control**   **Conci...**

Refresh

TOR962-1932 (416) 855-1932

Add Concierge Task

Enter a Name for your Concierge record and the Incoming Number you wish to screen in the provided spaces.

Time of Day specific Call treatment of incoming calls can be accomplished by properly configuring the provided Actions.

Start by selecting the desired Action. Next provide a Forwarding Number if required.

Select a Start Time and End Time for this Action to cover. Finally, select the Days that Screening Action should occur on. Clicking the Everyday link will cause all Days to be selected.

A Default Action can also be specified, and will be used whenever the specific Time of Day configurations do not apply.

Tip: If you use the "*" in the number you specify, all numbers beginning with the digits prior to the "*" will be treated as specified. e.g. If you specify "416*" to be

* **Name**   Office
* **Incoming Number**   (416) 236-3636
  Time of Day Action 1   Disabled
                             Disabled
                             Call Block
                             Forward to Number
                             Forward to Voice M
  Time of Day Action 2   Find Me
                             Priority Call
                             Urgent Call
  Time of Day Action 3   Virtual Ring
                             Forward when Busy
                             Forward when no Answer

  Default Action   Disabled

* **Required Information**

[Cancel]   [Save Record]

> Enter a descriptive name for the incoming call on which you will be adding the call treatment

> Enter the incoming phone number that you are screening

> Select the call treatment

> Click "Save Record" to confirm the call treatment

Once you've selected a call treatment option, you need to establish the time of day and days of the week where this action will occur. You have the option of making this action active for "All Day" and "Everyday" or selecting a range of days with start/stop times. It is possible to setup a concierge task that will provide special handling for up to three different date/time settings.

Add Concierge Task

Enter a Name for your Concierge record and the Incoming Number you wish to screen in the provided spaces.

Time of Day specific Call treatment of incoming calls can be accomplished by properly configuring the provided Actions.

Start by selecting the desired Action. Next provide a Forwarding Number if required.

Select a Start Time and End Time for this Action to cover. Finally, select the Days that Screening Action should occur on. Clicking the Everyday link will cause all Days to be selected.

A Default Action can also be specified, and will be used whenever the specific Time of Day configurations do not apply.

Tip: If you use the "*" in the number you specify, all numbers beginning with the digits prior to the "*" will be treated as specified. e.g. If you specify "416*" to be forwarded to your cellular number, then all calls coming from area code 416 will be forwarded.

* **Name**   Office
* **Incoming Number**   (416) 236-3636
  Time of Day Action 1   Forward to Number
  Forward to   (416) 207-1111
  All Day   ☐
  Start Time   0 : 00
  End Time   0 : 00
  Everyday   ☐
  ┌─**Days**──────────────────
  │ ☐ Mon   ☐ Tue   ☐ We
  │ ☐ Thur
  │ ☐ Fri   ☐ Sat   ☐ Su

  Time of Day Action 2   Disabled

  Time of Day Action 3   Disabled

  Default Action   Disabled

* **Required Information**

[Cancel]   [Save Record]

> The *Call Treatment* feature allows you to specify when the action will be applied. All day and everyday options are available, or you can select specific days of the week and start/end times (in quarterly increments).

Once this task is saved, it will take effect immediately.

You can edit your concierge task anytime and there is no real limitation on the number of tasks you create, but only one action can be applied per incoming number.

Concierge Tab > Menu Bar > Find Me – Follow Me

This feature can be set-up to ring alternate telephone numbers (simultaneously or sequentially), in an attempt to locate you when you are unable to answer, or are away from, your Hosted PBX phone. The image below provides a step-by-step overview of the Find-Me functionality.

STEP 1: Click on "Add Find Me Record"

STEP 2: Fill in new "Find-Me List Name". You can easily edit this information at anytime.

STEP 3: Select "Save Record" to confirm your new "Find-Me List Name"

STEP 4: To add phone numbers, select your new "Find-Me List"

STEP 5: Select "Add Number"

| Call Log | Directory | Voice Mail | Phone Control | Con |

Find Me - Follow Me | View list numbers | Refresh

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Add a new Find-Me Number

Enter the required information, and then click the **Save** button to create a new Find-Me Number.

No Answer Timeout is the number of seconds the system will attempt to connect to this phone number.

Name: Blackberry

Phone Number: 4164441234

No Answer Timeout: 15 s

Save Record

STEP 6: Add the name and phone number details. Use a descriptive name to help identify it in your list

STEP 7: Select "Save Record"

The "No Answer Timeout" can be set for each phone number in the list. It refers to the number of seconds the phone will ring before forwarding to the next number in your Find-Me List.

You can create several Find Me lists so it is important to identify each with a descriptive list name.

When the other phones in your Find Me list ring, you will be prompted with a recorded greeting advising you of the number of the caller and asking if you wish to accept or ignore the call.

It is important to note that each phone number should not have voice mail enabled. The search will stop if voice mail picks up before the call skips to the next phone number on your Find Me list. Alternatively, you can set the number of rings before forwarding to bypass the voice mail.

Call Log	Directory	Voice Mail	Phone Control	**Concierge**	Forum	Op

Add Concierge Task | Add Find Me Record | Refresh

> Create a new Find-Me List Record

> Shows the number of phone numbers assigned to this Find-Me List
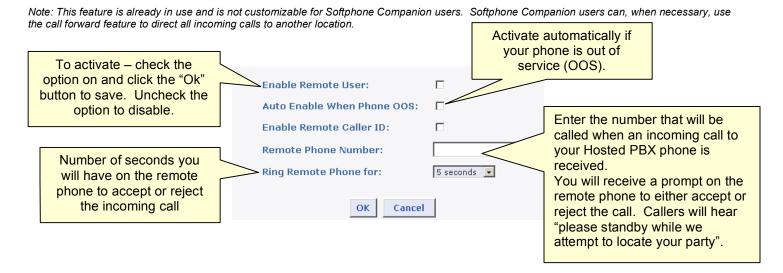
	Find-Me List Name	Numb		Caller ID	Function		
☐	On-Call FindMe	3	Ring All	Show	Edit	Delete	List
☐	Find-Me List 2	0	Sequential	Show	Edit	Delete	List
☐	Find-Me List 3	1	Sequential	Show	Edit	Delete	List
☐	Find-Me Weekends	2	Ring All	Show	Edit	Delete	List
☐	Find-Me List4	3	Sequential	Hide	Edit	Delete	List

> User-Defined names for the Find-Me Lists

> Ring all phones simultaneously or sequentially after defined time limit

> Edit Record:
>
> Change Name, Ring Option and if Caller ID should be shown

Find-Me List Name   On-Call FindMe

Ring Option   ○ Sequential
                     ● Ring All

Show Caller ID   ☑

Save Record

> Find-Me List - Click on "List"
>
> Shows the list of numbers and options. You can edit the record, add another number or delete it from the list.

	Sequence	Name	Phone Number	No Answer Timeout	Menu Timeout	Function	
☐	1	home	(905) 820-1234	15	15	Edit	Delete
☐	2	two	(416) 456-8900	15	15	Edit	Delete
☐	3	three	(416) 967-1111	15	15	Edit	Delete

> Add or Edit Phone Number on List

Name   Home Phone

Phone Number   (416) 456-8900

No Answer Timeout   15 seconds ▼

Menu Timeout   15 seconds ▼

Save Record

> Shows detail when adding or editing a phone number in the list. Use a Name that is descriptive.

Concierge Tab > *Menu Bar* > *Remote Phone*

The **Remote Phone** feature provides you with the flexibility to use your Hosted PBX phone when you are not at the same physical location as your Hosted PBX phone.

When enabled, incoming calls will go to your Hosted PBX phone as well as the configured remote phone number. You can then decide to accept or reject the call. You can also make outgoing calls from your remote phone that will appear to be coming from your Hosted PBX phone.

Note: This feature is already in use and is not customizable for Softphone Companion users. Softphone Companion users can, when necessary, use the call forward feature to direct all incoming calls to another location.

> Activate automatically if your phone is out of service (OOS).

> To activate – check the option on and click the "Ok" button to save. Uncheck the option to disable.

Enable Remote User:

Auto Enable When Phone OOS:

Enable Remote Caller ID:

Remote Phone Number:

Ring Remote Phone for: 5 seconds

OK   Cancel

> Enter the number that will be called when an incoming call to your Hosted PBX phone is received.
> You will receive a prompt on the remote phone to either accept or reject the call. Callers will hear "please standby while we attempt to locate your party".

> Number of seconds you will have on the remote phone to accept or reject the incoming call

Using the Remote Phone allows you to make outgoing calls that will appear to be coming from your Hosted PBX phone number.

Once you have entered your Remote Phone Number, simply use your call logs or directory to place an outgoing call that will appear to be coming from your Hosted PBX phone.

Concierge Tab > *Menu Bar* > **Call Forward**

In addition to the star codes (see user guide) **Call Forward** can also be programmed within the portal. Available call forwarding options include call forward all numbers and call forward busy/no answer.

Manage Account Information   Logout

| Call Log | Directory | Voice Mail | Phone Control | Concierge | Forum | Options |

Refresh

EMILY BUGG (416) 207-3394

Change your Default Call Fwd Feature

Change the default handling for your number.

Options are:
- Disabled
- Forward to another number
- Forward only when Busy or No-Answer

Call Answer Ring Time: 25   (seconds)

Default Action: Disabled

Disabled
Forward to Number
Forward Busy/No Answer

OK   Cancel

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Concierge Tab > Menu Bar > Backup Call Forward

It is important to be prepared for all situations, including the possibility of your Hosted PBX phone not being accessible due to a power or equipment related issue. Configuring your **Backup Call Forward** number on your *first* visit to the portal will ensure that should the situation arise no call will go unanswered.

Options Tab

- **Web Profile:** Customize your Hosted PBX portal profile (i.e. portal homepage, email)
- **Change Password:** Reset your Hosted PBX portal password
- **Language:** Select the language of the recorded messages when accessing your Hosted   PBX features
- **On-Hold Music:** You can select the hold music callers will hear when on hold
- **Audio Settings:** Users with Linksys phones can modify the phone headset or handset microphone volumes
- **User Guide:** View and/or download a copy of the My Hosted PBX Portal Guide