

# GlobalTone

## Installation Process Overview



**Welcome!** We wish to make your GlobalTone Hosted PBX installation process smooth and trouble free. Please familiarize yourself with this document, which will outline the installation process.

**Contacts:** Please designate one person as your project coordinator. GlobalPhone will assign a project coordinator to manage the project. All project decisions be coordinated through or copied to GlobalPhone's designated project manager.

**Installation Process** The following events will occur during the installation process. We will require your active and timely participation in this effort. All of the data gathering forms to be completed are found at:

<http://www.gphone.com/support> (click on **Installation** page)

1. **Site Survey** – You are required to fill out a site survey for each physical location where phones will be located. This is for establishing the 911 emergency service street addresses and documenting your LAN/Internet connectivity. You may need assistance from your LAN administrator to answer the technical questions. A person at each physical site must also complete a **VOIP Quality Test** by clicking on the link at the implementation website.
2. **Number Porting** – If you wish to port your existing phone numbers to your PBX, you must fax a Letter of Agency (LOA) form and send us your most recent phone bills from your current carriers, in their entirety. The phone numbers you wish to port must be visible somewhere on the phone bill. The LOA form is attachment A below
3. **Provisioning Spreadsheet:** Please download and complete a provisioning spreadsheet form at the implementation website. This form lets you designate the phone number or extension designated for each employee their name, location and email. Please note: this process sometimes causes changes to the quantities of seats and phone numbers in the original price quote. The final installation and monthly charges will be adjusted accordingly at the quoted prices.
4. **Auto Attendant Design** – If you have purchased an Auto Attendant, please complete the Auto Attendant design form in the implementation website. A description of the auto-attendant capabilities is shown below.
5. **Physical Installation and Service Turn up** Equipment will be shipped by fed-ex or UPS, upon receipt of your signed order, to the locations that you designate. If you have purchased a Call Quality Manager (Edgewater router), this device must first be installed. This device will be preprogrammed or easy installation using an IP address that you designate. After the Call Quality Manager is installed, you must unpack the phones and install them on each desk. When you unbox and connect a new phone to the network, our Plug and Dial system will simply prompt you for the extension to assign to the phone.

For sites without an Edgemark router, GlobalPhone will create a configuration file for each phone and place them on our public FTP server. The installer will go through the menu on the phone to input the correct FTP address. Once a phone is rebooted it will download its new configuration from our FTP server.

6. **End User Training** – End user training and orientation lasting approximately one hour will be conducted via conference and desktop sharing.

## **Attachments**

- A Letter of Agency**
- B Auto Attendant Instructions**
- C Call Quality Manager Installation**



Attachment A

### Letter of Agency

A Letter of Agency (LOA) must be completed by the end-user and supplied to GlobalPhone upon request. The LOA must contain the name and current service address of the end-user and the numbers that will be ported to GlobalPhone from the end-user's current carrier. The LOA used must comply with FCC regulations and must be dated and signed by the end-user or a person who has the authority to act as a legal agent.

**Dear Customer,**

Thank you for choosing **GlobalPhone Coop. (GlobalPhone)** as your network carrier. As you are aware, you may continue to use your existing telephone number with **GlobalPhone**. In order to transition your current telephone number to the **GlobalPhone** network, **GlobalPhone** must work with your previous service provider to ensure that your service is uninterrupted, and where applicable, to ensure that your number is transferred.

Your prior service provider requires this letter as proof that you have explicitly authorized and requested that your service and current telephone number be transferred to another service provider. By filling in all the information requested below and signing and dating this letter, you provide us with the authorization to initiate the process of transferring your service and telephone number to **GlobalPhone**. You will then be able to use your old number with the **GlobalPhone** network.

Please ensure the following information is completed accurately to prevent possible delays.

**End-User Name (Business or Residential):** \_\_\_\_\_

Person authorized to make this request if a business: \_\_\_\_\_

Service Street Address: \_\_\_\_\_ Suite or Apartment No: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP Code: \_\_\_\_\_

Current Service Provider: \_\_\_\_\_

*\*Note that all Telephone Numbers listed below must be associated with this Name.*

Beginning Range TN	End Range TN	Billing (main acct) TN for porting TNs

PLEASE REMOVE ANY FEATURES (i.e., Hunt Group) ASSOCIATED WITH THESE NUMBERS PRIOR TO SUBMITTING THIS LOA. ADDITIONALLY, PLEASE DO NOT PLACE ANY NEW SERVICE ORDERS OR DISCONNECTS WITH YOUR CURRENT SERVICE PROVIDER ON THIS ACCOUNT, AS THIS WILL CAUSE A DELAY IN PORTING YOUR NUMBERS.

If you wish to select **GlobalPhone** as your new service provider for the telephone number listed on this form, you will need to sign your initials on the THREE (3) lines below, as applicable:

- I select \_\_\_\_\_ (initials) **GlobalPhone** as the network carrier for all **local calls** for this number.
- I select \_\_\_\_\_ (initials) **GlobalPhone** as the network carrier for all **intrastate toll calls** for this number.
- I select \_\_\_\_\_ (initials) **GlobalPhone** as the network carrier for all **interstate toll and international calls** for this number.

If you want to receive service on the **GlobalPhone** network, you will need to select GlobalPhone in ALL THREE (3) spaces above. You may not have more than one carrier for each TYPE of service above.

By signing below, I designate **GlobalPhone** to transfer my service from my current provider to **GlobalPhone**. By signing below, I also authorize **GlobalPhone** to transfer my current telephone number used to provide service so that **GlobalPhone** may provide its network service to me. By signing below, I also authorize **GlobalPhone** to obtain billing information, customer service records, and other information required to provide me with service on the **GlobalPhone** network. I understand that I may consult with **GlobalPhone** as to whether a fee will apply to the change.

Printed End-User Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Please sign and date, then e-mail a properly named digital version (pdf, gif, tif, jpg, htm) of this form to: **provisioning@gphone.com** or fax it to **703-531-6000**.



## Auto-Attendant Planning Instructions

Your auto attendant is the most important function in your Hosted PBX. It determines how calls will be answered and the voice prompts associated with your menu choices. You will need to plan how your auto attendant will work. Complete the auto-attendant design online at <http://www.gphone.com/support/globaltone.asp> (click on **Implementation**)

### **Menus**

You may have one main auto attendant menu or multiple auto-attendant menus that cascade to each other. For example: you may need to setup separate menus based on location, such as West Coast, East Coast, based on department, i.e. Software Sales, Technical Support etc, or by language, i.e. English, Spanish etc. There is no limit on how many menus, or levels, your PBX may have, however there is additional cost per month for each auto attendant. Please use the attached worksheet to plan your menu options. You may make as copies of the menu forms as needed to complete your Virtual PBX. Fill in the number of the menu in the blank space provided, and check the box next to the action that you would like to take place.

### **Recording the Menus**

As part of our implementation, GlobalPhone will record the menus for you in English. Other languages will incur professional service fees. If you wish to use your own voice, you may simply call your voicemail and record it there. The file will be emailed to you if you are set up for voicemail to email service and you can forward it on to [provisioning@gphone.com](mailto:provisioning@gphone.com). For higher quality sound, you may use Windows Recorder or another program or professional service. Save the file as CCITT u-Law or A-Law 8.000 kHz 8 bit Mono .WAV file type.

### **Holiday and Business Hours**

Each greeting has an alternate message and action for business hours or holidays. For example, after business hours, you may want to go directly to voicemail or forward calls to a call center or West Coast office that stays open later. If you require different greetings, you must specify the alternate greetings and the business hours and holidays you wish to implement.

### **Extensions**

Extensions can be dialed at any time within the Virtual PBX to send the caller directly to the desired person or group. Extensions can be 3 - 9 digits long, but all extensions within a Virtual PBX must be the same length. An extension can go to a user, a hunt group or a voice mailbox. All end users have an extension. End users may also have a direct dial phone number that can be called from outside without passing through the auto-attendant, but this is optional.

### **Company Directory**

The auto attendant typically provides callers an option to listen to a company directory or dial by name, for example, the first three letters of the first or last name. Individuals may be removed from the directory so that callers may not directly call their lines. You may wish to prevent outside callers to call your company President or individual technical support representatives.

### **Voice Mail**

Each extension has the option to have a voice mail box. Voice mail may be listened to directly from the telephone (a voicemail indicator light will illuminate), or the user may remotely dial into is/her voice mail box. Voice mails may be also delivered to an email address as a .wav file so that they can be listened to anywhere your email is accessible (requires sound card and speakers on the PC). You must provide us with the email addresses associated with each extension.

**Company Voicemail:** You may have your voicemail sent to a "master" voicemail address called the Company Voicemail. This would be used as a global voice mailbox that a group of individuals are responsible for checking. In this way you do not rely on one individual to respond to voicemail.

### **Music on Hold**

When a caller is put on hold, music will play to the caller to let them know they are on hold. The auto attendant comes with default music, however you have the ability to play customized music- on-hold, containing your advertising messages or product information. GlobalPhone does not provide music-on-hold recording services, however there are many services available and they may be found by simply googleing **music on hold recording service**. Once you have recorded your music on hold, email the audio file (.WAV format) to [provisioning@gphone.com](mailto:provisioning@gphone.com).

### **Call Center Option**

GlobalTone provides an optional Call Center software capability which provides call queuing and routing features. Call center representatives “log in” or “log out” of a queue. By using your touch-tone phone, you may activate or remove an extension from the queue. For example: if there are multiple representatives answering your sales calls, but work different hours or in different physical locations, they may log in and out of the system by using their phone or a web application, thus providing you with more coverage in varying time zones. The call center option provides statistical reports on the call activity. Feel free to contact a Globaltone support for more information on setting this up.

### **Call Recording**

Will you want to record your calls for quality assurance, training, and/or purchase verification? We offer call recording which records all of your calls and makes them available on our website. Additional fees apply for this service. For more information regarding this feature, please visit <http://www.gphone.com/service/globalrecording/index.asp>

### **Hunt Groups**

Hunt Groups are a vital part of your PBX. They define how incoming calls will be distributed between groups of users. A combination of extensions can be used to create hunt groups. A hunt group consists of more than one extension number and is able to try each extension in succession until the call is answered, goes to voice mail, or is sent to another number or hunt group. For example, you may wish to create a hunt group for your sales personnel so that any sales person may answer the sales line. There is no limit as to how many phone numbers the hunt group can “roll through.” Hunt groups may be set up for simultaneous ring or sequential ring. You must fill out a hunt group order form for each hunt group.

You can have many Hunt Groups and a single phone can be a part of several Hunts groups for example:

The Department Sales has three users

Paul x101, Hank x102, and Sasha x103

The Department Service has 5 users

Paul x101, Sasha x 103 Peter x 104, Malcolm x105, and Hussein x 106

Notice that both Sales and Service has 2 users in common.

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Hunt groups can distribute call 4 different ways based on your company needs.

Without a Hunt Group incoming calls would normally go to each person individually but in the example above you would like anyone in sales to answer your incoming calls. You can set up the group behavior so that:

- ❖ Linear Ringing - All phones ring serially one at a time starting with the first number in the group - you can specify the number of rings per phone before the rollover occurs. If a line becomes available during a rollover and it is higher in the group it will not be rung again. Once all phones have been rung the call leaves the Hunt Group to either a forwarding number [you select] or a general sales VM.
- ❖ Simultaneous Ringing- All users phones ring at the same time and whoever picks up first wins. The user answering will not be able to answer another call if occupied. You cannot put the call on hold and answer another. If you wish to answer multiple calls then your Gtone seat must be a Premium Seat and must be shared with others. After all phones have been rung the call leaves the Hunt Group to either a forwarding number [you select] or a general sales VM.
- ❖ Circular Ringing - Calls roll over to the next available number starting with the first available number. In this case the rollover does not have to start with the first line. For example; if line 101 is busy but then becomes available during the rollover it will ring even though it is higher in the group. This is what makes circular different than Linear. After all phones have been rung the call leaves the Hunt Group to either a forwarding number [you select] or a general sales VM.
- ❖ Uniform Ringing – Calls are distributed based on number of calls received. This option will load balance the group so one user does not get all the calls. After all phones have been rung (x) times the call leaves the Hunt Group to either a forwarding number [you select] or a general sales VM.

## Attachment C                      Setting up the Edgemark Router

### a. Introduction to the Edgemark Router

90% of problems with VOIP phone systems occur in the last mile of the network. GlobalPhone provides a business-class managed service that allows GlobalPhone to prevent, or diagnose and fix problems with your phone system. The phone system is core infrastructure to your business and it needs a professional solution. The GlobalTone Solution:



GlobalPhone installs call Quality management devices from Edgewater Networks at every site where there is a concentration of phones. The device allows GlobalPhone to prioritize voice packets, remotely manage your phones and remotely alert and troubleshoot problems when they occur. Here are the highlights of its features:

Function	Purpose
Prioritize Voice Packets over Data	Eliminates packet delay and contention associated with shared data/voice networks. Large file downloads, web browsing and email get lower priority than voice conversations.
Serves as a local file server (FTP) for phones	Makes phones easy to install, easy to upgrade to the latest revision of software, and easy to reboot in case of loss of power. There is no need to go over the internet to retrieve the operating system and configuration information of a phone that lost power.
Automated Phone Configuration	GlobalPhone's pushes the configuration into the phone when it is plugged into the network, simplifying setup and allowing us to quickly drop ship phones directly to your location without pre-staging.
Firewall and Network Address Translation	Protects your network from the internet and lets your phone work behind your firewalls.
Call Trace Logging	Makes problem diagnosis easy when we can analyze the call setup handshaking that the phone is passing.
Mean Opinion Scoring (MOS) and other statistics	Telephone industry standard MOS scoring automatically alerts GlobalPhone if quality drops to substandard levels
Real Time Visual and Email Alerts using the EdgeView Network Monitoring system	GlobalPhone's Network Operations Center (NOC) performs 24/7 visual monitoring of its phone network. We see visual alarms when your phones go down and email alerts keep our NOC staff on top of the problems.

### How to setup your new Edgemark Router with GlobalPhones Hosted PBX service.

Using the information from your site survey, GlobalPhone will pre-configure the Edgemark to work with your ISP, such that you will need only to connect it to the internet and power it on. Our support engineers will be able to perform the rest of the configuration remotely.

Call 703-584-4375 Global Phone support line to have the rest of the installation performed by a support engineer.