



417 2<sup>nd</sup> Avenue West Seattle, WA 98119  
Email: [service@kall8.com](mailto:service@kall8.com)  
Phone: 206-479-2600 or 866-222-1818  
FAX: 206-479-2616 or 800-760-4583

## Planning Instructions for Kall8 Virtual PBX

Before you begin filling out the forms that follow, you will need to plan how your Virtual PBX will work. It may be necessary to have multiple Virtual PBX's. For example: a main PBX for business hours, one for the evening and weekends, and possibly one for holidays. Or you may need to setup your PBX based on location. Such as West Coast, East Coast, etc.

### Menus

Please use the following pages for your menu options. You may make as many copies of the menu forms as needed to complete your Virtual PBX. There is no limit on how many menus your Virtual PBX may have, but over 50 menus may incur an extra cost. 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.

### 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. By using extensions, you may "roll through" multiple numbers per in a single extension (up to 5 numbers per extension, plus one voice mail).

### Hunt Groups

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 calls is answered, goes to voice mail, or is terminated. There is no limit as to how many phone numbers the Virtual PBX can "roll through". Please see the examples following the menu forms.

Extensions may be used to "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, they may log in and out of the system by using their phone. Thus providing you with more coverage in varying time zones. Feel free to contact a Virtual PBX technician 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 the website, delivered by email, or both. Please visit [www.kall8.com/call\\_recording.php](http://www.kall8.com/call_recording.php) for more information regarding this feature.

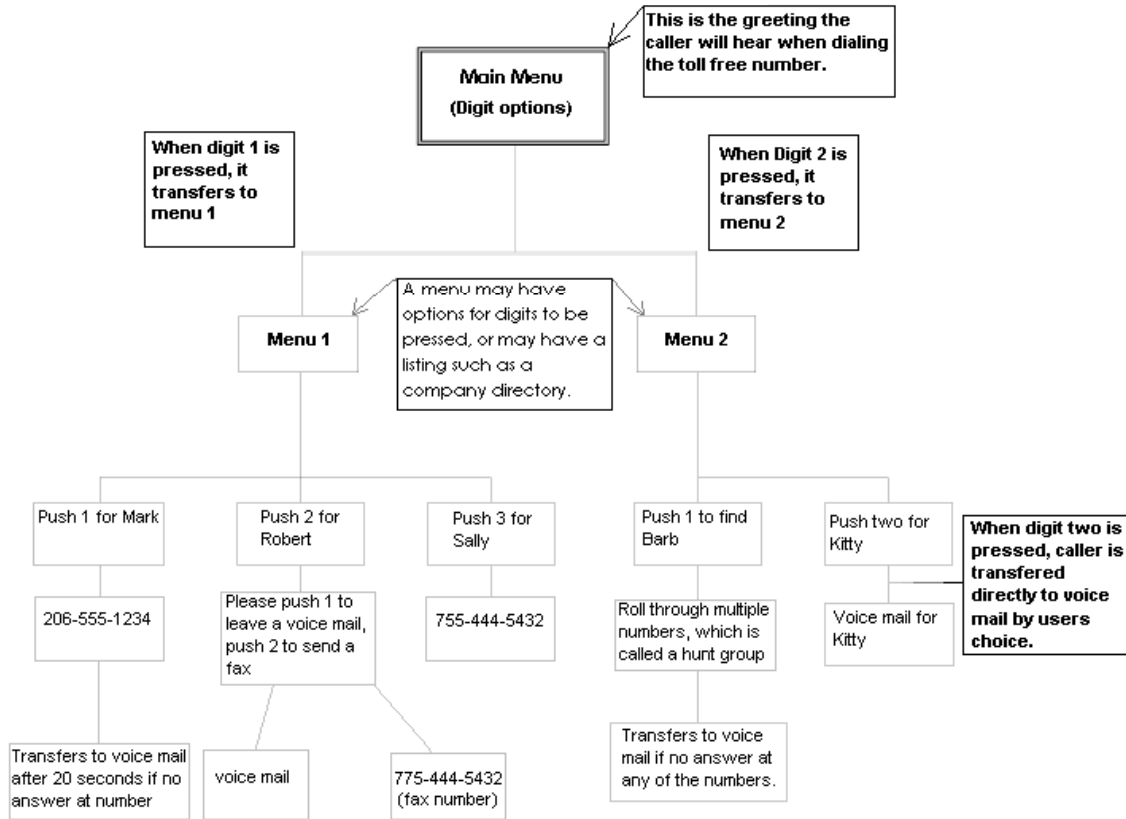
### Voice Mail

**Extension Voicemail:** Each extension has the option to have their own voice mail box. The voice mails would then be delivered to an email address as a .wav file so that they can be listened to anywhere your email is accessible. In order to listen to voice mails, you will need a computer equipped with a sound card and speakers.

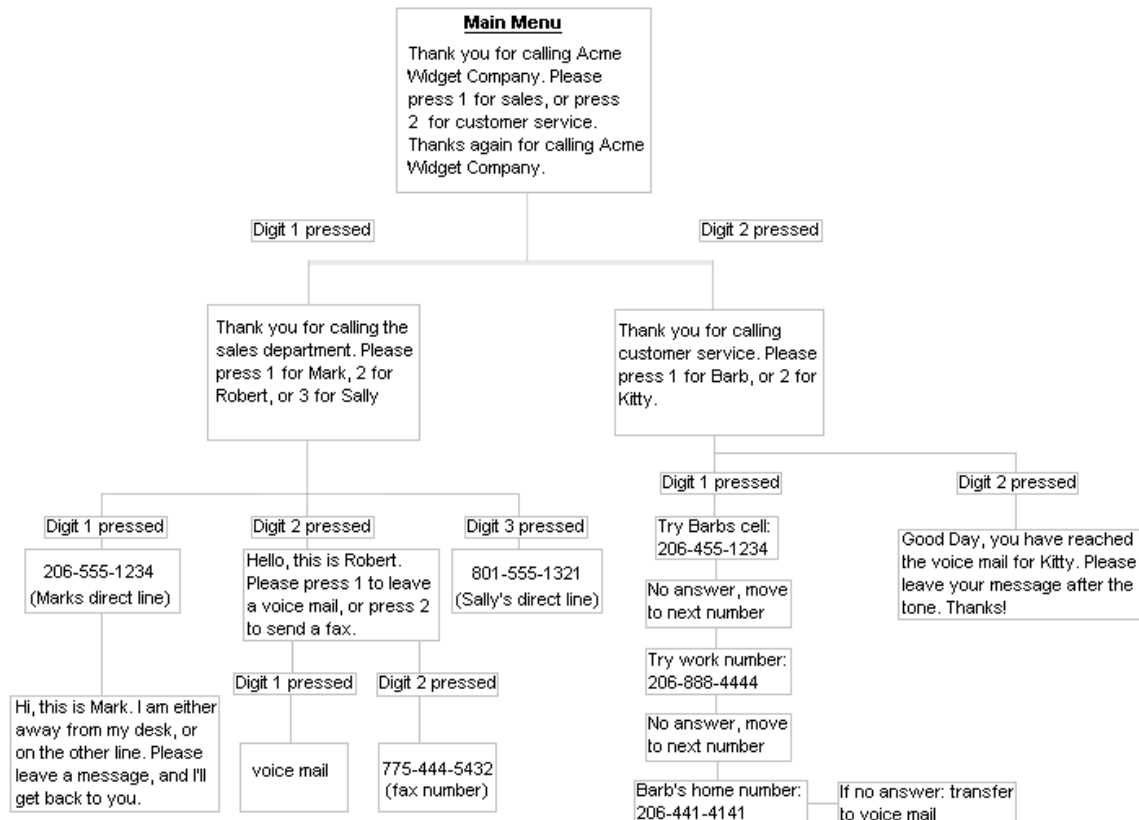
**Company Voicemail:** There is also the option of having your emails sent to a "master" email address called the Company Voicemail. This would be used as a global email address for all of your voicemails to be delivered to. For example; if you wanted to appear to have a large presence, and have multiple extensions (one for customer service, sales, etc..) you may have all extensions terminate to the same email address. That way all of the voice mails would be retrievable via one email address, and you would be providing a "corporate" appearance to your callers.

\*\*\*Some people are more visual than verbal. It might help you to plan your Virtual PBX by drawing out how you would like it to flow. An example of a simple Virtual PBX flow chart follows.

# 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 go back to the home page on [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.

Kall8 Number(s) for which the Virtual PBX is being programmed:

\_\_\_\_\_

Company/Virtual PBX Owner: \_\_\_\_\_

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

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

Will the same program operate 24hours/day, 7 days a week?  Yes  No

If No, will you be needing more than one Virtual PBX?  Yes  No

If you will only need one Virtual PBX, what would you like to call it? (Each Virtual PBX needs a name. 4 - 20 characters max)

\_\_\_\_\_  
\_\_\_\_\_

If you will need more than one Virtual PBX, please complete the following for the times you would like each Virtual PBX to be active:

Name of Virtual PBX	Times for Virtual PBX to be active
_____	From _____ To _____
_____	From _____ To _____

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

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

Do you want to record your calls?  Yes  No

If yes, do you want to be on the high volume or low volume program? (Go to [http://www.kall8.com/call\\_recording.php](http://www.kall8.com/call_recording.php) for pricing.) High Volume  Low Volume

## Main Menu

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

**If the Caller Presses 1** : (choose one of the following options and fill in where required)

- Go to Menu # \_\_\_\_\_ ;or  
 Transfer to ring-to number \_\_\_\_\_ or extension number: \_\_\_\_\_  
 Transfer to voicemail (check one)  Company voicemail  Ext. voicemail – Ext. # \_\_\_\_\_  
 Play a message which says: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Then transfer to:  Number \_\_\_\_\_  Ext.# \_\_\_\_\_  Menu# \_\_\_\_\_  
 Company voicemail  Ext. voicemail–Ext.# \_\_\_\_\_  Disconnect Call

**If the Caller Presses 2** : (choose one of the following options and fill in where required)

- Go to Menu # \_\_\_\_\_ ;or  
 Transfer to ring-to number \_\_\_\_\_ or extension number: \_\_\_\_\_  
 Transfer to voicemail (check one)  Company voicemail  Ext. voicemail – Ext. # \_\_\_\_\_  
 Play a message which says: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Then transfer to:  Number \_\_\_\_\_  Ext.# \_\_\_\_\_  Menu# \_\_\_\_\_  
 Company voicemail  Ext. voicemail–Ext.# \_\_\_\_\_  Disconnect Call

**If the Caller Presses 3** : (choose one of the following options and fill in where required)

- Go to Menu # \_\_\_\_\_ ;or  
 Transfer to ring-to number \_\_\_\_\_ or extension number: \_\_\_\_\_  
 Transfer to voicemail (check one)  Company voicemail  Ext. voicemail – Ext. # \_\_\_\_\_  
 Play a message which says: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Then transfer to:  Number \_\_\_\_\_  Ext.# \_\_\_\_\_  Menu# \_\_\_\_\_  
 Company voicemail  Ext. voicemail–Ext.# \_\_\_\_\_  Disconnect Call

If more than three digits are needed, please use copies of this sheet to complete the number of digits needed. Each menu has digits 0 through 9, as well as the \* and # keys available.

**\*\*HINT:** The \* and # keys are typically used for repeating the current menu (#), and returning to the main menu (\*).

**Menu #**

**Menu Greeting (optional):** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**If the Caller Presses 1 :** (choose one of the following options and fill in where required)

- Go to Menu # \_\_\_\_\_ ;or
- Transfer to ring-to number \_\_\_\_\_ or extension number: \_\_\_\_\_
- Transfer to voicemail (check one)    Company voicemail    Ext. voicemail – Ext. # \_\_\_\_\_
- Play a message which says: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Then transfer to:    Number \_\_\_\_\_    Ext.# \_\_\_\_\_    Menu# \_\_\_\_\_  
                           Company voicemail    Ext. voicemail–Ext.# \_\_\_\_\_    Disconnect Call

**If the Caller Presses 2 :** (choose one of the following options and fill in where required)

- Go to Menu # \_\_\_\_\_ ;or
- Transfer to ring-to number \_\_\_\_\_ or extension number: \_\_\_\_\_
- Transfer to voicemail (check one)    Company voicemail    Ext. voicemail – Ext. # \_\_\_\_\_
- Play a message which says: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Then transfer to:    Number \_\_\_\_\_    Ext.# \_\_\_\_\_    Menu# \_\_\_\_\_  
                           Company voicemail    Ext. voicemail–Ext.# \_\_\_\_\_    Disconnect Call

**If the Caller Presses 3 :** (choose one of the following options and fill in where required)

- Go to Menu # \_\_\_\_\_ ;or
- Transfer to ring-to number \_\_\_\_\_ or extension number: \_\_\_\_\_
- Transfer to voicemail (check one)    Company voicemail    Ext. voicemail – Ext. # \_\_\_\_\_
- Play a message which says: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Then transfer to:    Number \_\_\_\_\_    Ext.# \_\_\_\_\_    Menu# \_\_\_\_\_  
                           Company voicemail    Ext. voicemail–Ext.# \_\_\_\_\_    Disconnect Call

If more than three digits are needed, please use copies of this sheet to complete the number of digits needed. Each menu has digits 0 through 9, as well as the \* and # keys available.

**\*\*HINT: The \* and # keys are typically used for repeating the current menu (#), and returning to the main menu (\*).**

**Menu #**

**Menu Greeting (optional):** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**If the Caller Presses 1** : (choose one of the following options and fill in where required)

- Go to Menu # \_\_\_\_\_ ;or
- Transfer to ring-to number \_\_\_\_\_ or extension number: \_\_\_\_\_
- Transfer to voicemail (check one)    Company voicemail    Ext. voicemail – Ext. # \_\_\_\_\_
- Play a message which says: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Then transfer to:    Number \_\_\_\_\_    Ext.# \_\_\_\_\_    Menu# \_\_\_\_\_  
                           Company voicemail    Ext. voicemail–Ext.# \_\_\_\_\_    Disconnect Call

**If the Caller Presses 2** : (choose one of the following options and fill in where required)

- Go to Menu # \_\_\_\_\_ ;or
- Transfer to ring-to number \_\_\_\_\_ or extension number: \_\_\_\_\_
- Transfer to voicemail (check one)    Company voicemail    Ext. voicemail – Ext. # \_\_\_\_\_
- Play a message which says: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Then transfer to:    Number \_\_\_\_\_    Ext.# \_\_\_\_\_    Menu# \_\_\_\_\_  
                           Company voicemail    Ext. voicemail–Ext.# \_\_\_\_\_    Disconnect Call

**If the Caller Presses 3** : (choose one of the following options and fill in where required)

- Go to Menu # \_\_\_\_\_ ;or
- Transfer to ring-to number \_\_\_\_\_ or extension number: \_\_\_\_\_
- Transfer to voicemail (check one)    Company voicemail    Ext. voicemail – Ext. # \_\_\_\_\_
- Play a message which says: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Then transfer to:    Number \_\_\_\_\_    Ext.# \_\_\_\_\_    Menu# \_\_\_\_\_  
                           Company voicemail    Ext. voicemail–Ext.# \_\_\_\_\_    Disconnect Call

If more than three digits are needed, please use copies of this sheet to complete the number of digits needed. Each menu has digits 0 through 9, as well as the \* and # keys available.

**\*\*HINT: The \* and # keys are typically used for repeating the current menu (#), and returning to the main menu (\*).**

## Extension Setup Example

**EXTENSION:** 1001      **NUMBERS TO TRY**      **SECONDS TO WAIT FOR ANSWER**  
 \*\*\*NOTE: Each ring is approx 4 seconds

Phone Number: <u>2065551213</u>	# of Seconds <u>20</u>
Phone Number: <u>2064441234</u>	# of Seconds <u>10</u>
Phone Number: <u>2065551213</u>	# of Seconds <u>12</u>
Phone Number: _____	# of Seconds _____
Phone Number: _____	# of Seconds _____
Ext. #: _____	# of Seconds _____
Private Voicemail #: _____	# of Seconds _____

-OR-

Kall8 Voicemail:       Company Voicemail       Ext. Voicemail – Ext. #: \_\_\_\_\_  
 Email address to receive voice mails: \_\_\_\_\_

When an extension is dialed, the system will hunt through the numbers in the order that they are entered. You may enter as many as 5 phone numbers for the Virtual PBX to attempt.

The lower the seconds in the “Seconds to wait for answer”, the sooner the call will roll to the next number. Not all fields need to have a value. A single number may be entered into the first phone number field, and then after that number is tried for say 20 seconds, the call could then roll to voice mail. If none of the numbers are available in a given extension, there is the option to move to another extension or pass on to voice mail. In the example above, the Virtual PBX will attempt the first number for 20 seconds, the second number for 10 seconds, the third number for 12 seconds, then go to the company voice mail.

The voice mail may be an already established voice mail system (Private Voicemail), or you may wish to have your voice mails delivered via email from our Kall8 voice mail system. If this is the case, please include the email address you would like to receive the voice mails at.

**\*\*REMEMBER:** each extension may have it's own Kall8 voice mail box. This will allow the extension "owner" to receive only their voice mails, and no others.

## Hunt Group Setup

**SYSTEM WILL HUNT:**

EXT. #	TYPE	NUMBERS	SECONDS	ACTIVE/INACTIVE
Ext. 1111	Phone 1	555-555-0001	10	Active
	Phone 2	555-555-0222	10	Active
	Phone 3	555-555-0333	10	Active
Ext. 2222	Phone 1	999-999-5050	20	Active
	Phone 2	999-999-7777	20	Active
	Transfer to:	Voicemail		

In the example above, you can see that the hunt group is rolling through different extensions, and the numbers associated with them. The extensions will always be hunted in the same order, however you can login and set certain extensions to inactive and the system will skip over them when hunting.

Once the hunt group has tried all the numbers, and there wasn't an answer, it will then go on to voice mail. There is the option to have a “No answer time” that will allow you to dictate how long you want to wait on a specific number before moving on. Please discuss your hunt group(s) with your Virtual PBX technician for more detailed information.

## Extension Worksheet

Please follow the model on the Extension Setup page to fill in the below. Feel free to make as many copies of this page as needed.

<b>EXTENSION #:</b> _____	<b>NUMBERS TO TRY</b>	<b>SECONDS TO WAIT</b>
Phone Number: _____		# of Seconds _____
Phone Number: _____		# of Seconds _____
Phone Number: _____		# of Seconds _____
Phone Number: _____		# of Seconds _____
Phone Number: _____		# of Seconds _____
Ext. #: _____		# of Seconds _____
Private Voicemail: _____		# of Seconds _____
-OR-		
Kall8 voicemail: <input type="checkbox"/> Company Voicemail	<input type="checkbox"/> Ext. Voicemail – Ext. # _____	
Email address: _____		

---

<b>EXTENSION #:</b> _____	<b>NUMBERS TO TRY</b>	<b>SECONDS TO WAIT</b>
Phone Number: _____		# of Seconds _____
Phone Number: _____		# of Seconds _____
Phone Number: _____		# of Seconds _____
Phone Number: _____		# of Seconds _____
Phone Number: _____		# of Seconds _____
Ext. #: _____		# of Seconds _____
Private Voicemail: _____		# of Seconds _____
-OR-		
Kall8 voicemail: <input type="checkbox"/> Company Voicemail	<input type="checkbox"/> Ext. Voicemail – Ext. # _____	
Email address: _____		

---

<b>EXTENSION #:</b> _____	<b>NUMBERS TO TRY</b>	<b>SECONDS TO WAIT</b>
Phone Number: _____		# of Seconds _____
Phone Number: _____		# of Seconds _____
Phone Number: _____		# of Seconds _____
Phone Number: _____		# of Seconds _____
Phone Number: _____		# of Seconds _____
Ext. #: _____		# of Seconds _____
Private Voicemail: _____		# of Seconds _____
-OR-		
Kall8 voicemail: <input type="checkbox"/> Company Voicemail	<input type="checkbox"/> Ext. Voicemail – Ext. # _____	
Email address: _____		

---

# Hunt Group Worksheet

## HUNT GROUP SETUP:

Hunt groups are a group of extensions that the Virtual PBX will hunt through. The extensions will always be hunted in the same order, however you can login and set certain extensions to inactive and the system will skip over them when hunting.

Ext #: \_\_\_\_\_  Active  Inactive

Ext #: \_\_\_\_\_  Active  Inactive

Ext #: \_\_\_\_\_  Active  Inactive

Ext #: \_\_\_\_\_  Active  Inactive

Ext #: \_\_\_\_\_  Active  Inactive

Ext #: \_\_\_\_\_  Active  Inactive

Ext #: \_\_\_\_\_  Active  Inactive

Ext #: \_\_\_\_\_  Active  Inactive

Ext #: \_\_\_\_\_  Active  Inactive

Ext #: \_\_\_\_\_  Active  Inactive

If the call isn't answered, you may send it to either a private voicemail or one of your Kall8 voicemail boxes.

Private Voicemail #: \_\_\_\_\_ # of Seconds \_\_\_\_\_

Kall8 Voicemail:  Company voicemail  Ext. voicemail – Ext. # \_\_\_\_\_