



## VirtualPBX Deployment Guide

Thank you for choosing VirtualPBX! We want to ensure you have a smooth transition and have designed this guide to assist you as you implement your new business phone service. Deploying VoIP in your business successfully consists of the following phases. Please review them and should you have any questions, feel free to contact us.

- 1. Network Preparation:** Ensure the highest quality VoIP calls by testing your current system and aligning it with network requirements.
  - 2. System Setup:** Prepare your system by defining business hours, configuring call routing, selecting phones and attending trainings.
  - 3. Transfer Number(s):** Move your existing toll-free and/or local phone numbers to your new system.
  - 4. Feature Review:** Take advantage of top features and configure them to your liking.
  - 5. Onboarding:** Review your system and make adjustments with our onboarding specialist.
- OR Concierge Service:** Want a professional to take over system setup from here? Meet your VirtualPBX Concierge.

## Department Contact Information

All departments are open Monday - Thursday 7am-5pm Pacific, and Friday 7am - 4pm Pacific.

### Sales

888-825-0800 Option 1  
[Sales@VirtualPBX.com](mailto:Sales@VirtualPBX.com)

### Account Services

888-825-0800 Option 4  
[AccountServices@VirtualPBX.com](mailto:AccountServices@VirtualPBX.com)

### Technical Support

888-825-0800 Option 2  
[Support@VirtualPBX.com](mailto:Support@VirtualPBX.com)

### Billing

888-825-0800 Option 5  
[Billing@VirtualPBX.com](mailto:Billing@VirtualPBX.com)

### Porting

888-825-0800 Option 2  
[Porting@VirtualPBX.com](mailto:Porting@VirtualPBX.com)

[VirtualPBX.com](http://VirtualPBX.com) | 111 N. Market St., Suite 1000, San Jose, CA 95113 | Toll Free: 800.914.VPBX | Fax: 888.825.0800

# 1. Network Preparation

By choosing business phone services from VirtualPBX, you receive the benefits of our co-located datacenter, maximum network security, overall reliability with no planned downtime, and 360 degrees of service. To ensure you receive these benefits with no disruption in service, check each step below and make any necessary changes to guarantee your network will be ready when you go live with your new phone system. Note that not all networks automatically have the minimum requirements.

**Ensure your system meets the following service requirements.**

<b>Processor</b>	Minimum: Pentium 4® 2.4 GHz or equivalent Optimal: Intel Core 2 Duo or equivalent, Video Card with DirectX 9.0c support
<b>Memory</b>	Minimum: 1 GB RAM Optimal: 2 GB RAM
<b>Hard Disk Space</b>	400 MB (Install/Upgrade, 200 MB operation)
<b>Operating System</b>	Mac OS X 10.9 or 10.10 (Yosemite) Microsoft Windows Vista Microsoft Windows 7 Microsoft Windows 8 (Desktop mode) Microsoft Windows 8.1 (Desktop mode)
<b>Browser</b>	Google Chrome: version 41 or higher Microsoft IE version 9 or higher Mozilla Firefox version 37 or higher Safari version 8 or higher
<b>Connection</b>	IP network connection (broadband, LAN, wireless); constant internet connection
<b>Sound Card</b>	Full-duplex, 16-bit or use USB headset (VoIP devices)

- Choose a strong password and stress that your users do the same.** Strong passwords consist of upper and lower case letters, numbers, at least eight characters, and no easily accessible personal information. After logging into the system for the first time, make sure to change both your phone and web password.
- Test your internet connection.** Test the connection from your existing ISP (internet service provider) here: [virtualpbx.com/services/voip-speed-test/](http://virtualpbx.com/services/voip-speed-test/). Our team will review your results with you and determine whether your network has the capacity to deliver high quality calls or if additional steps need to be pursued.
- Verify your router's compatibility.** We recommend the Netgear AC1200 for homes and small offices as well as the Netgear AC1900 for large home offices and small to medium sized businesses. If you are unsure of your router's compatibility, contact us at [Support@VirtualPBX.com](mailto:Support@VirtualPBX.com). In some cases a new router will need to be purchased, we offer a few of our tested routers here: [virtualpbx.com/services/recommended-routers/](http://virtualpbx.com/services/recommended-routers/).

- Configure your modem/router.** Verify your modem is in bridge mode or ISP pass through (you may need to contact your ISP for instructions) and follow the configuration outlined here: <http://info2.virtualpbx.com/NetworkConfigurationForVoIPphones.pdf>. If you have an MRC (Modem Router Combo), we highly recommend that you purchase a stand-alone router. Doing this can resolve issues like not being able to receive calls, not being able to transfer calls, or not being able to get multiple phones up and running at one time. Bridge mode converts your device into a modem only. More specifically, your ISP will be turning off the NAT system, firewall, and DHCP, functions that your new, stand-alone router will handle.
- Connect phones to your network.** Test and verify all network settings by plugging phones directly into the network and plugging network cables into the back of phones. If you are waiting on phones from VirtualPBX, please confirm the shipping address for all phones you have ordered and ensure a team member is available to accept the UPS package. Standard time of arrival is 5 business days.

## 2. System Setup

Prior to VoIP phones arriving or your numbers transferring, setting up the VirtualPBX system is one of the most important tasks. This step allows you and your organization to configure the many different options available to best suit your business needs. We encourage you to get to know your system and will reach out ten days from your signup date to assist with any questions you may have.

*Don't have time to configure your system alone? Our Concierge Service Team will work with you to strategize your ideal setup and then deploy your system setup for you.*

- Attend Training Sessions and share resources with your users.**
  - Self-guided training for system users and administrators: [virtualpbx.com/support/online-training/basic-training/](http://virtualpbx.com/support/online-training/basic-training/)
  - Weekly system administrator training via webinar Thursdays at 10am Pacific: [virtualpbx.com/support/online-training/advanced-admin-training/](http://virtualpbx.com/support/online-training/advanced-admin-training/)
  - Quick reference document library for help on particular topics: [virtualpbx.com/support/support-forms-documents/](http://virtualpbx.com/support/support-forms-documents/)
- Check that your phone system is in the correct timezone.** Login to the vConsole as a system administrator and click the “Admin” tab, then “Advanced Configuration.” At the bottom of the page, click “Get Offset” and then “Update.”
- Set your business hours.** Login to the vConsole as a system administrator and click the “Admin” tab, then “Day/Night Mode” and define call routing during and after business hours.
- Configure auto attendant.** Create or order the recording(s) that greet and direct callers as they enter your system as well as on hold music or information.
- Choose VoIP phones for yourself and your users.** We promote a select list of VoIP phones that have been tested with the VirtualPBX system, but we can also accommodate analog phones with an adapter and smartphones/devices with a softphone app. Learn more here: [virtualpbx.com/plans/voip-phone-list/](http://virtualpbx.com/plans/voip-phone-list/)

### 3. Transfer Number(s)

Confirm that any numbers you would like to transfer to VirtualPBX are portable with the current carrier. Items such as ownership, contracts, incorrect information on a Letter of Agency (LOA) and other inaccurate details can delay your transfer process. If you have DSL service and do not want to lose it, call your DSL service provider for a new number before you submit your transfer, or you may lose your DSL service entirely.

- Prepare your old phone number for your new system before you submit a porting request.** Cancel any special features or pending service orders from your current provider attached to this phone number (like call forwarding). Do not cancel your former phone service at this point. Porting (transferring your number(s)) can take up to a few weeks to complete. Make sure that you wait until the port is complete to cancel.
- Submit a request to port your number(s).** Fill out the correct LOA along with a bill copy dated in the past 60 days. The information that you provide must match the current carrier's records. VirtualPBX will take the documents you have provided and submit them to your current carrier.
  - Toll-Free Number LOA form: [virtualpbx.com/files/vpbx.tfLOA.pdf](https://virtualpbx.com/files/vpbx.tfLOA.pdf)
  - Local Number LOA form: [virtualpbx.com/files/vpbx.localLOA.pdf](https://virtualpbx.com/files/vpbx.localLOA.pdf)
- Test out system settings and features while waiting for your number to port.** Upon signup, VirtualPBX will provide you with an assigned number to use prior to a port completing to create your account.
- Receive notification that your transfer has completed.** The main contact will be alerted via email that the number is ready for use in your VirtualPBX system.
- Remove your temporarily assigned number.** If you no longer want or need the number that was assigned to you during the transfer process, you will be provided with instructions to remove it.

### 4. Feature Review

We're proud to offer a strong feature set and want to make sure that you take full advantage of the features that best suit your business. Take some time to review the below features and should you need help configuring them, feel free to reach out. We have also created a library of guides to offer step-by-step instructions on specific features, available here: [virtualpbx.com/support/support-forms-documents/](https://virtualpbx.com/support/support-forms-documents/)

- Call Recording:** select which lines will automatically record calls.
- Conferencing:** every VirtualPBX system comes with conferencing – removing the need for third party services that add more complexity and cost to your business communication needs.
- VirtualPBX Softphone App:** turn your smartphone, tablet, or computer into a fully-featured VoIP PBX phone that makes and receives calls over your data connection, through your VirtualPBX system.
- VirtualPBX Extension Manager App:** stay connected on the go with control over extension settings like call routing, logging in and out of ACD Queues, and more.
- TrueACD Queues:** route callers to a specific extension or department. Common executions include queues for billing, sales, and service; but your TrueACD Queue(s) can be configured to fit your business needs.
- Follow-Me Calling:** forward your calls to a list of phone numbers you have designated, until it is answered, so you never miss a call or surrender your personal phone number.

- Voicemail and Fax Forwarding:** provide copies of each voicemail and fax that an employee or team receives to a designated email address.
- Dialed Number Identification Service (DNIS):** give a product, team, or promotion its own number and capitalize on unique answering, monitoring, and reporting.
- Mail-Only/Information Extensions:** record any message you choose, like hours of operation or directions to your business, and route callers back to the auto-attendant or to voicemail when the message finishes.
- Online/Paperless Fax:** send faxes without a fax machine or paper.
- Advanced Call Routing:** define how callers are routed once they reach your system with triggers based on geography and user input.
- Other Features:** visit our feature page for more detail at [virtualpbx.com/services/features/](https://virtualpbx.com/services/features/)

## 5. Onboarding

We want to make sure that you start your VirtualPBX service off on the right foot. An onboarding specialist will review your system, help you make adjustments and answer any questions you may have. Within your first few weeks with VirtualPBX, an onboarding specialist will reach out to get started. If you need help in advance, or at any point, you may create a case with our support team by sending an email to [Support@VirtualPBX.com](mailto:Support@VirtualPBX.com).

## Upgrade to Concierge Service

Above and beyond typical onboarding, our Concierge Service can help you manage your system, including:

- **Strategy:** We'll help you assess how best to manage your users, call volume, message handling, routing, administrator settings, and more.
- **Setup:** Here's the best part – we'll set your system up for you, to your specifications.
- **Monitoring:** We'll stay in touch to make sure your kick-off goes smoothly and check in on a monthly basis.

Call 888.825.0800, email [Concierge@VirtualPBX.com](mailto:Concierge@VirtualPBX.com) or visit us at [virtualpbx.com/plans/concierge-service/](https://virtualpbx.com/plans/concierge-service/) to add the VirtualPBX Concierge Service to your plan for \$49/month. Setup fee for new system configuration is a one time charge of \$50.

## Having Network Problems?

We want you to get the most out of your VirtualPBX system and our ProSIP Services Team is available to ensure your network can handle high quality VoIP calls without a hitch. But it doesn't stop there. Our team is ready to help even if you're experiencing issues on your network not related to VoIP or VirtualPBX. Some key indicators of a network in need of assistance include choppy sound, dropped calls, static, one way or no audio.

If your network is experiencing these issues, please make a record of the date and time of the call as well as information on the call's destination and origin. This will help us diagnose your issue. You can create a case by emailing [Support@VirtualPBX.com](mailto:Support@VirtualPBX.com) or speak with your VirtualPBX Concierge for help.