



# MyPBX Client User Manual

Version 1.0.0.4

**Yeastar Information Technology Co. Ltd.**

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# Part 1 How To Activate MyPBX Client Addon

## 1 Activate MyPBX Client Addon

To activate client Addon, you should provide your MyPBX LAN MAC address. You can find it on the motherboard or the enclosure of MyPBX.

Here is a screenshot of a MAC address:



(Figure 1-1)

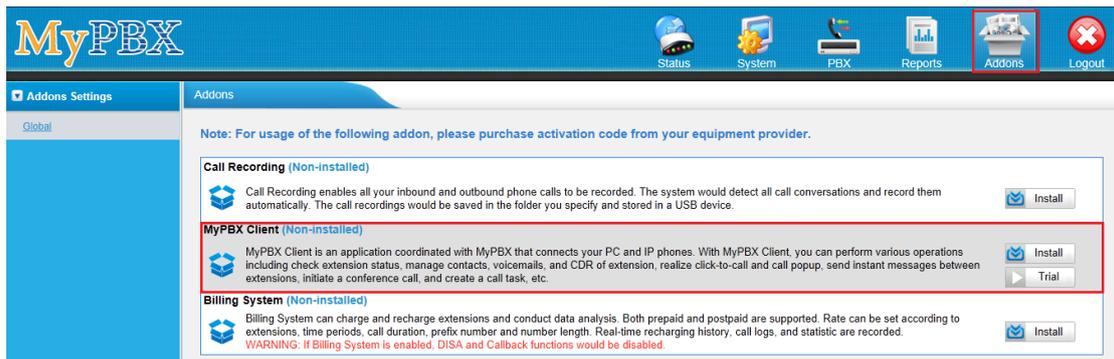
Notes:

1. Client addon is available on MyPBX Enterprise/U100/U200/U300/U5XX series only now.
2. LAN MAC is the key to get license.

Please contact the reseller/dealer from whom you got the MyPBX to purchase activation license.

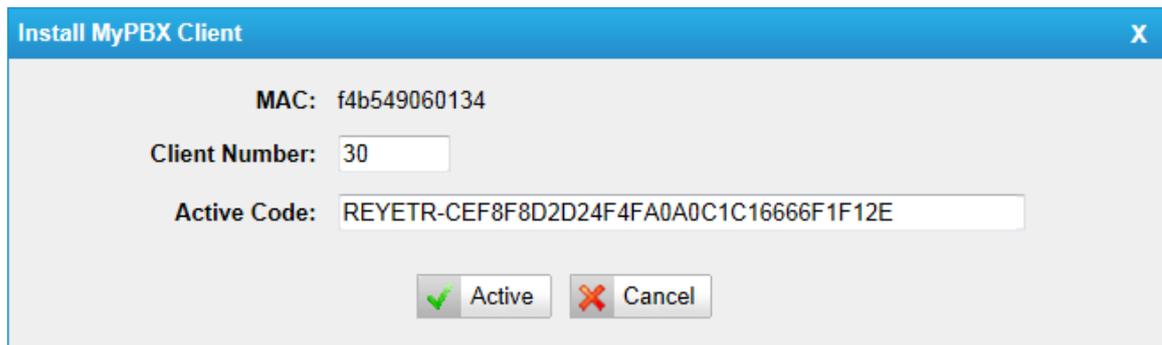
Below is the steps to activate the Client addon:

Step 1. Click "Addons" to switch to the Client addon activation page.



(Figure 1-2)

Step 2. Click “Install” and enter the activation code you purchased, then click “Active”.



(Figure 1-3)

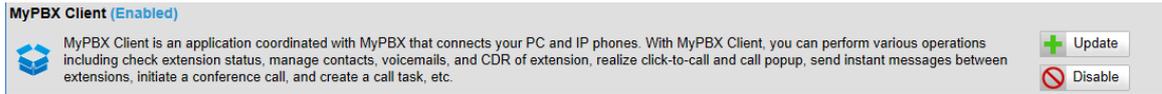
Step 3. After you click “Active”, MyPBX will pop up a reboot tag. Click “Reboot now”, the activation will take effect permanently after the MyPBX reboots.

#### Notes:

1. Activation is permanent in MyPBX even if you make a factory reset on MyPBX. If you want to change the number of client, you should enter the activation code again and confirm the number of client.
2. By default, MyPBX can support 2 clients even if you don't activate it.
3. When you purchase activation code, you can ask for another developer, which is “yea” by default.
4. You can't install the activation code on another MyPBX.

## 2 MyPBX Client Addon Settings

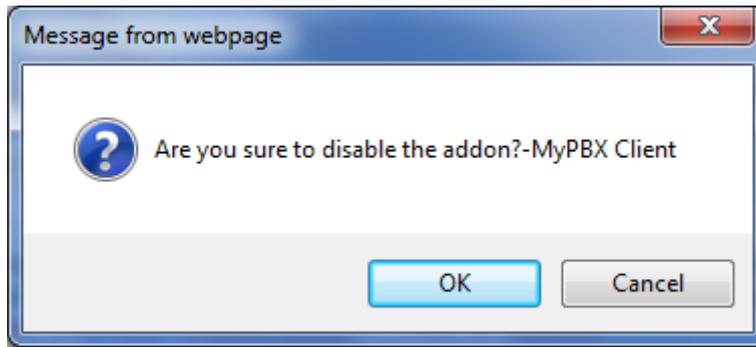
You can disable/enable/update the addon after it is activated successfully.



(Figure 2-1)

### Disable MyPBX Client addon

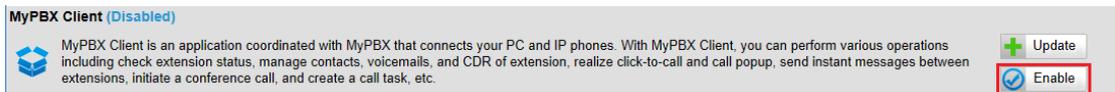
You can click “Disable” to disable MyPBX client addon temporarily. Click “Disable”, MyPBX will pop up the window below, and then click “OK” to disable it.



(Figure 2-2)

### Enable MyPBX Client addon

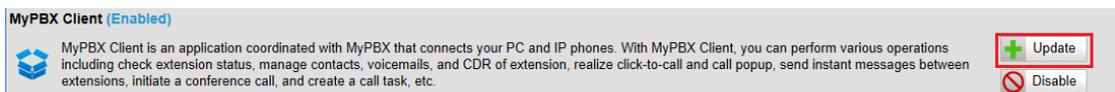
If you have disabled MyPBX client addon, you can enable it again by clicking “Enable”.



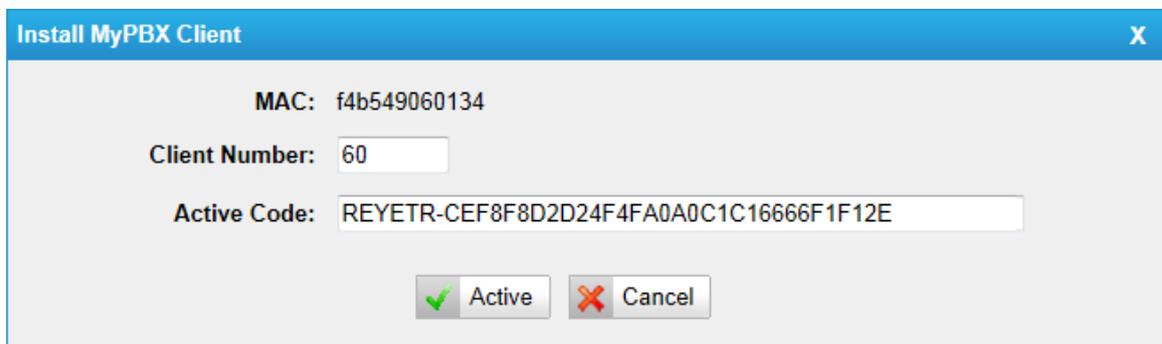
(Figure 2-3)

### Update MyPBX client addon license

If you want to change the number of client which MyPBX supports, click “Update” and enter the activation code and client number to active it again.



(Figure 2-4)



(Figure 2-5)

# Part 2 How to use Client software

## 1 Introduction

MyPBX Client has clean and user-friendly interface as well as lovely icons. The simple and human-based practices allow users to click to call out so easily that they don't need to remember any number; when users engaged themselves in thinking, no need to be disturbed or annoyed by constant ringing tones, just give a "command" and MyPBX Client will help you to politely decline incoming calls; when users are absent, no need to worry about missing any important calls, MyPBX Client can help record voice messages.

Not only is MyPBX Client with call management functions that can easily manage the call conference, voicemails and call recordings, but also a unified communication terminal that can send internal instant messages.

## 2 Install MyPBX Client

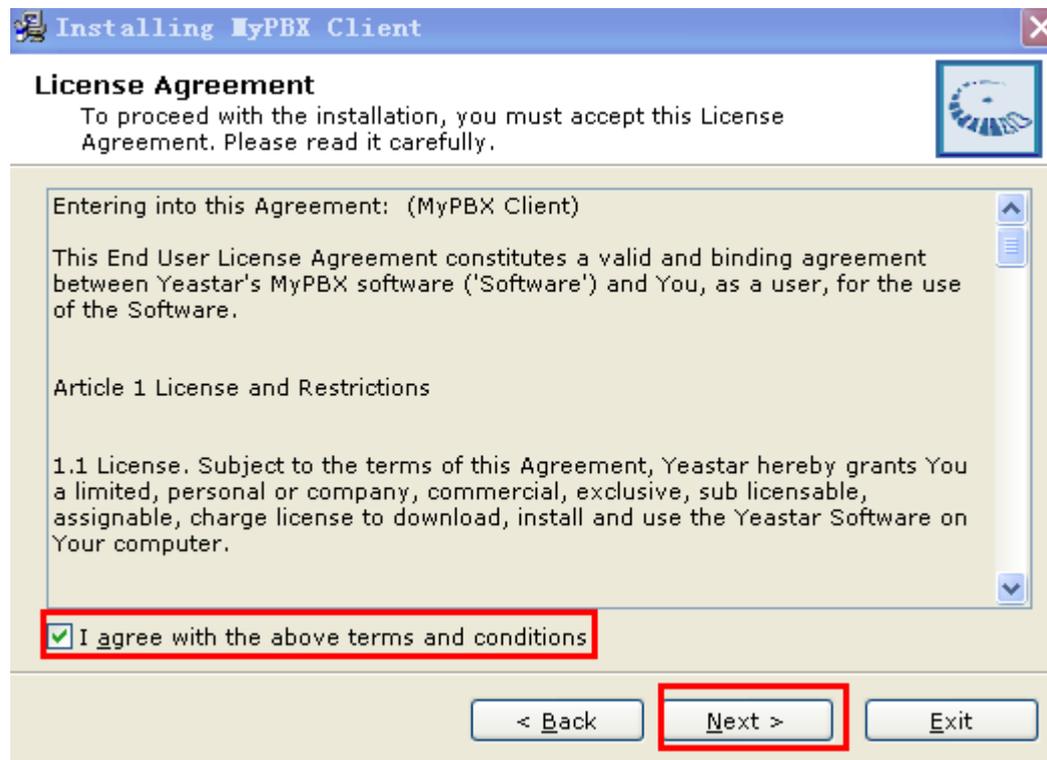
This section shows how to install MyPBX Client software on the PC.

1. Download the MyPBX from  
<http://www.yeostar.com/download/MyPBX-Client/MyPBXClientSetup1.0.0.4.exe>
2. Double click the "MyPBX ClientSetup1.0.0.4.exe", "Welcome to the MyPBX Client Installation" screen will come up. Click "Next" to continue.



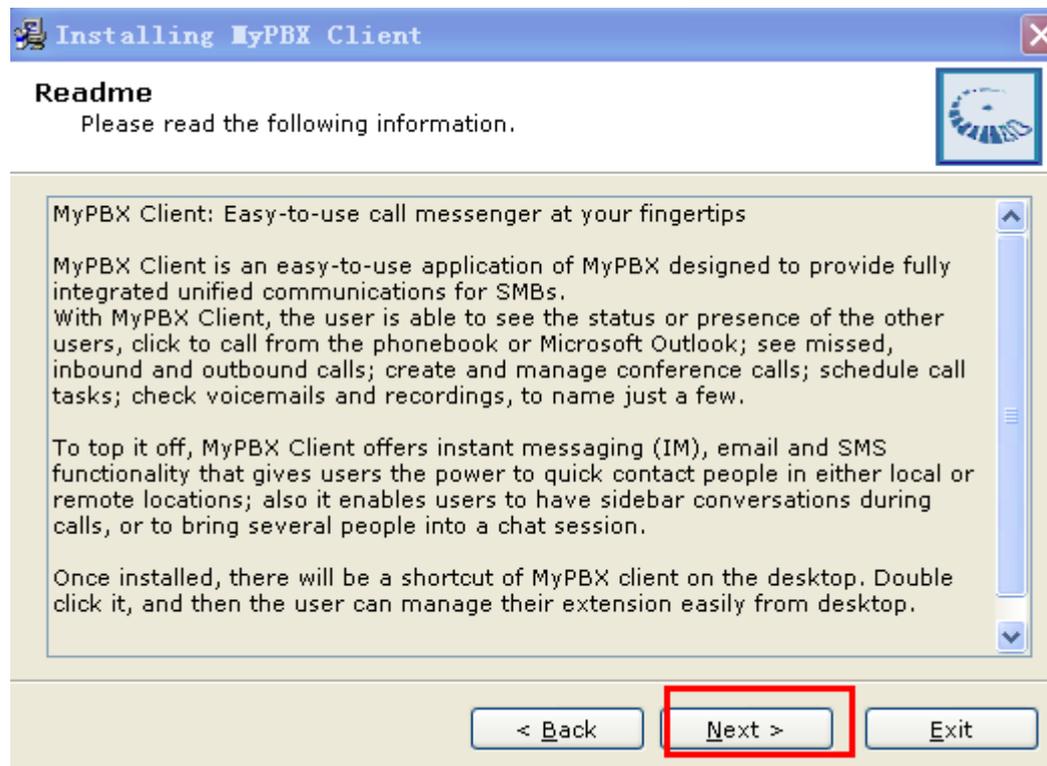
(Figure 2-1)

3. Read through the software License Agreement, select “I agree with the above terms and conditions”, and then click **Next** to continue. See Figure2-2.



(Figure 2-2)

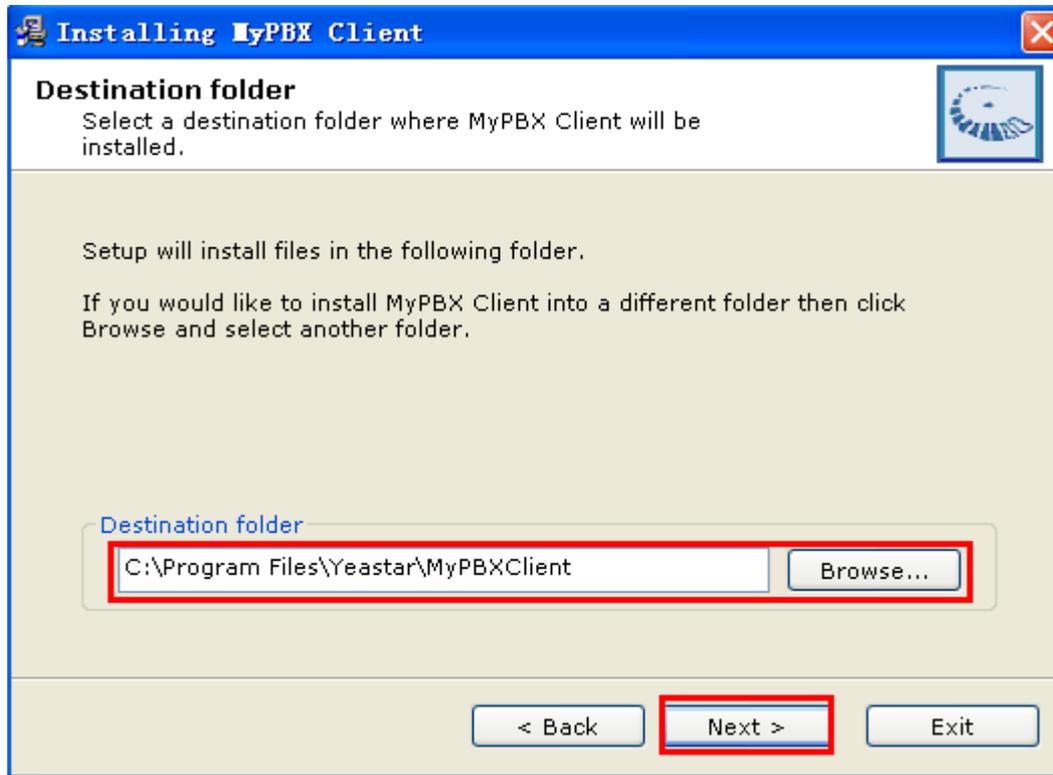
4. Click **Next** after going over the provisions.



0

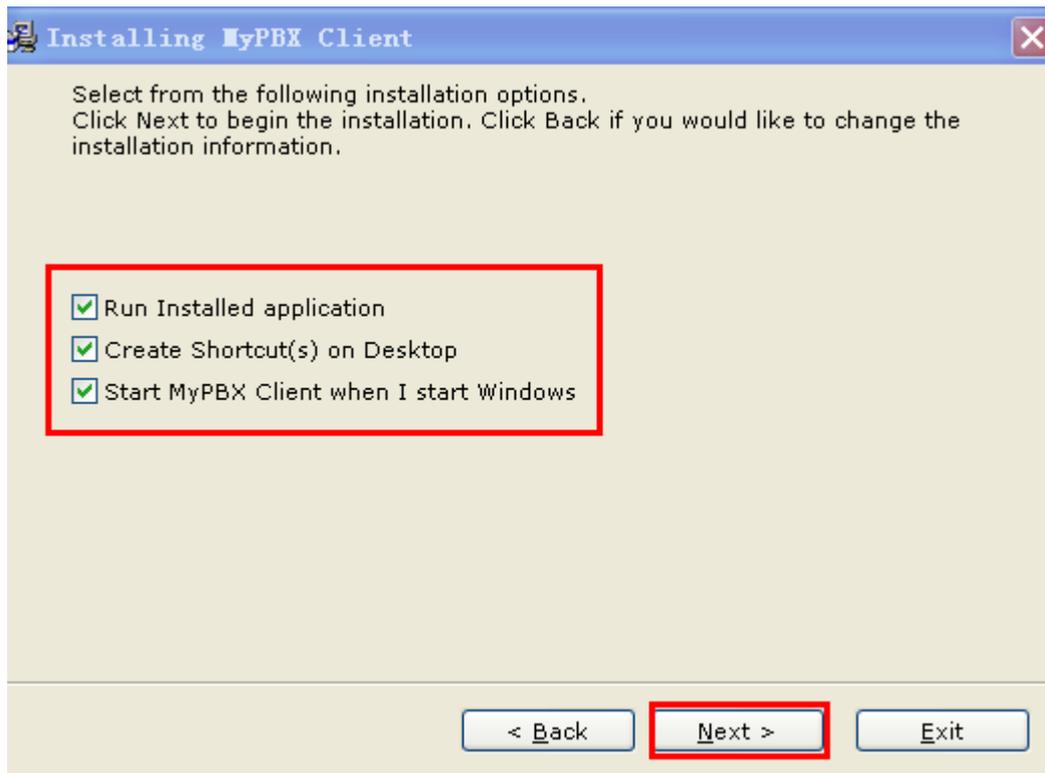
(Figure 2-3)

5. The Destination folder screen allows you to decide where to store MyPBX Client on your computer. Click **"Next"** to continue.



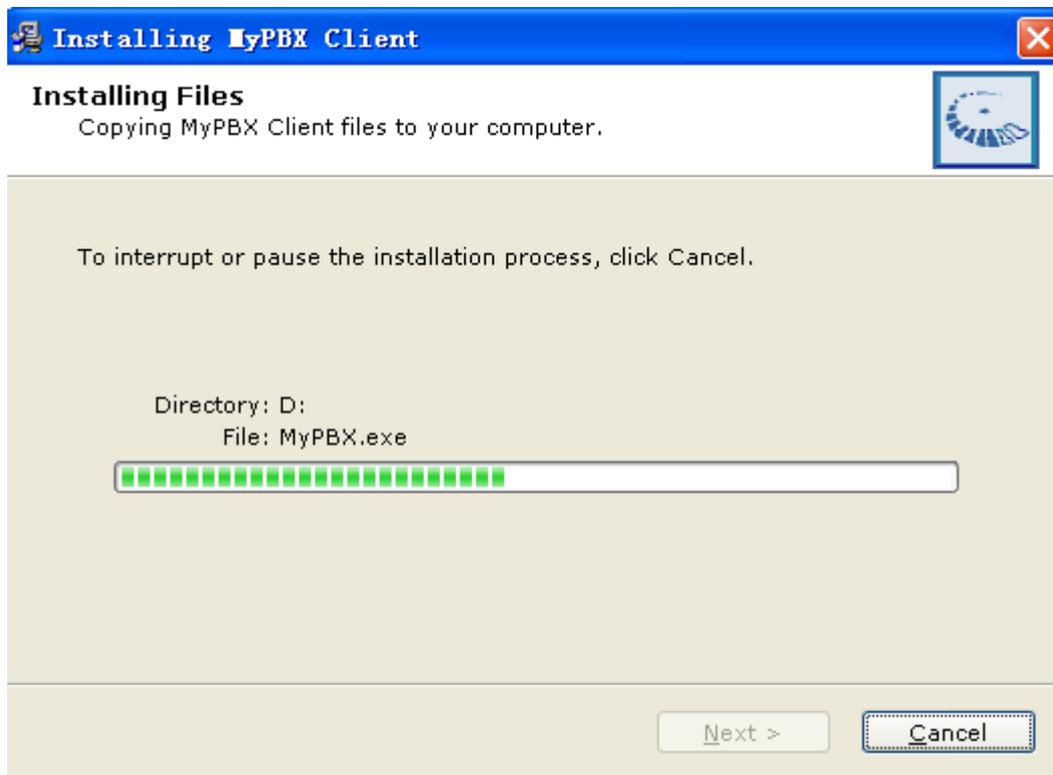
(Figure 2-4)

6. A screen pops up to notify you that:
  - (1) Run Installed application
  - (2) Create Shortcut(s) on Desktop
  - (3) Start MyPBX Client when I start WindowsEnable the options as you wish, and then click **'Next'**.



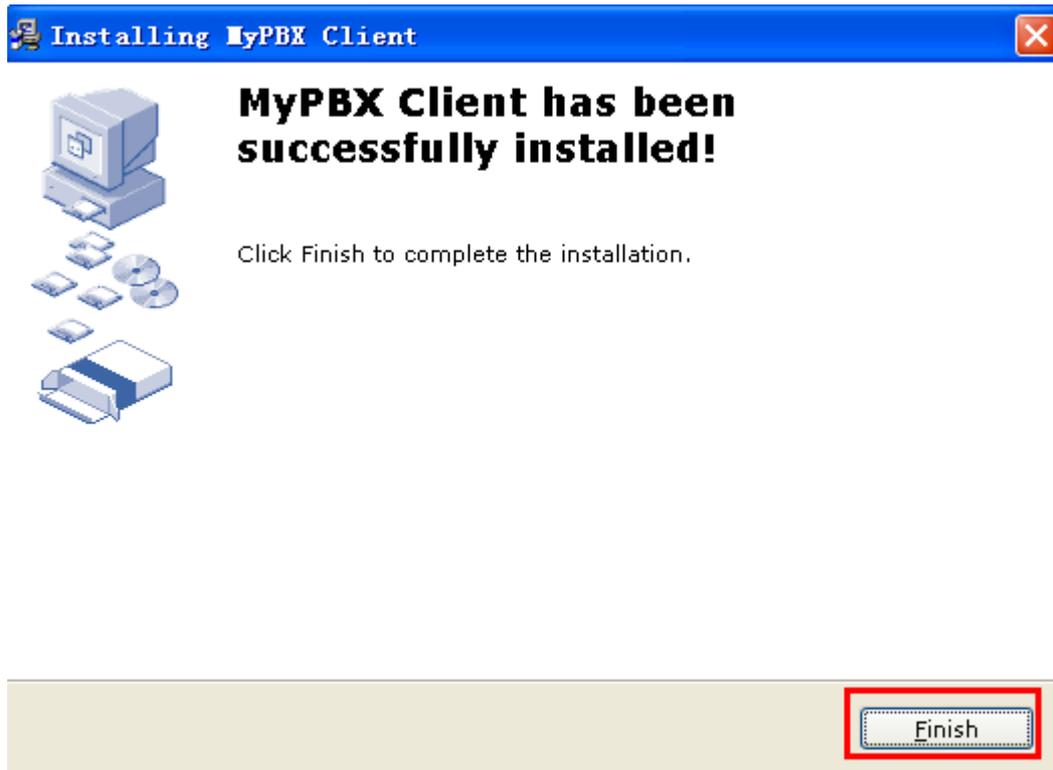
(Figure 2-5)

7. Enter into the “Installing Files” page. The system begins the installation, which will take a while.



(Figure 2-6)

8. When the installation is complete, a screen will pop up to notify you that the software is installed successfully. Click **Finish**.

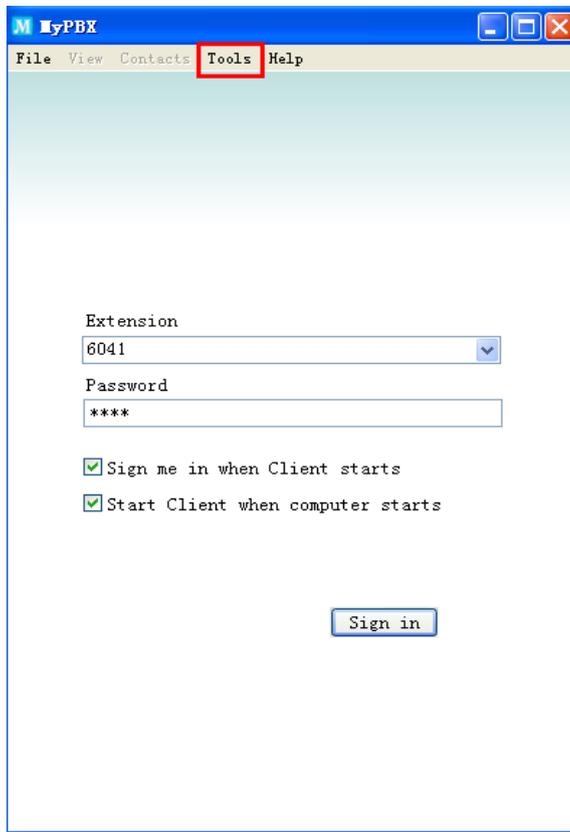


(Figure 2-7)

### 3 Log in MyPBX Client

After the installation, you can enjoy the powerful functions MyPBX Client offers.

Double-click shortcut  and launch MyPBX Client. Please enter your Ext. number and password and then click “Sign In”, see Figure 3-1.



(Figure 3-1)

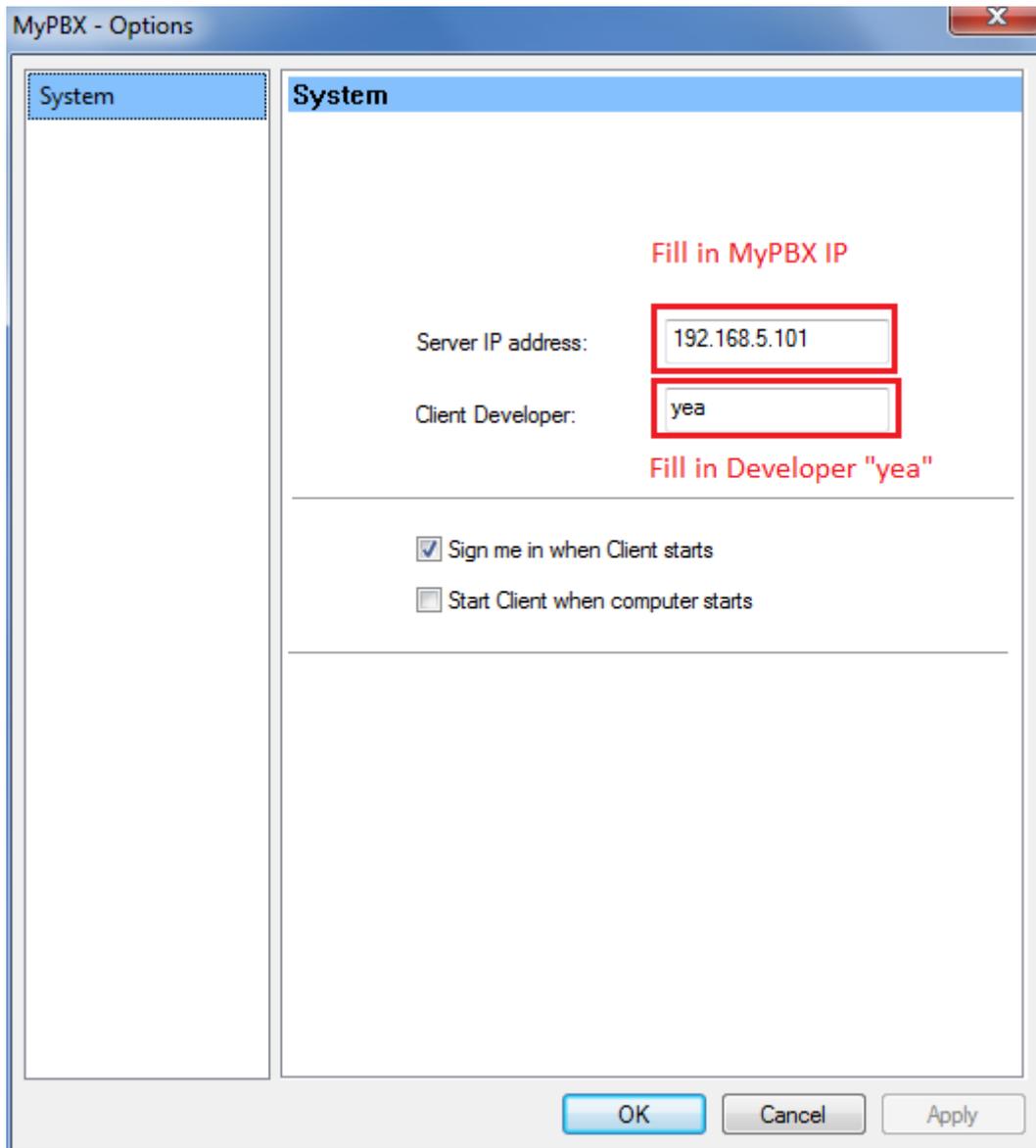
**Please pay attention when you log in for the first time:**

Please click “Tools” on menu→Options, and enter the IP address of MyPBX Server and Client Developer on Figure 3-2. You can get this IP and developer from Admin.

**About Ext. and Password**

Obtain the Extension and Password from your system Admin before you log in MyPBX Client. The password for extension is the voicemail PIN. Check it on the extension edit page on MyPBX.

If you want to modify



(Figure 3-2)

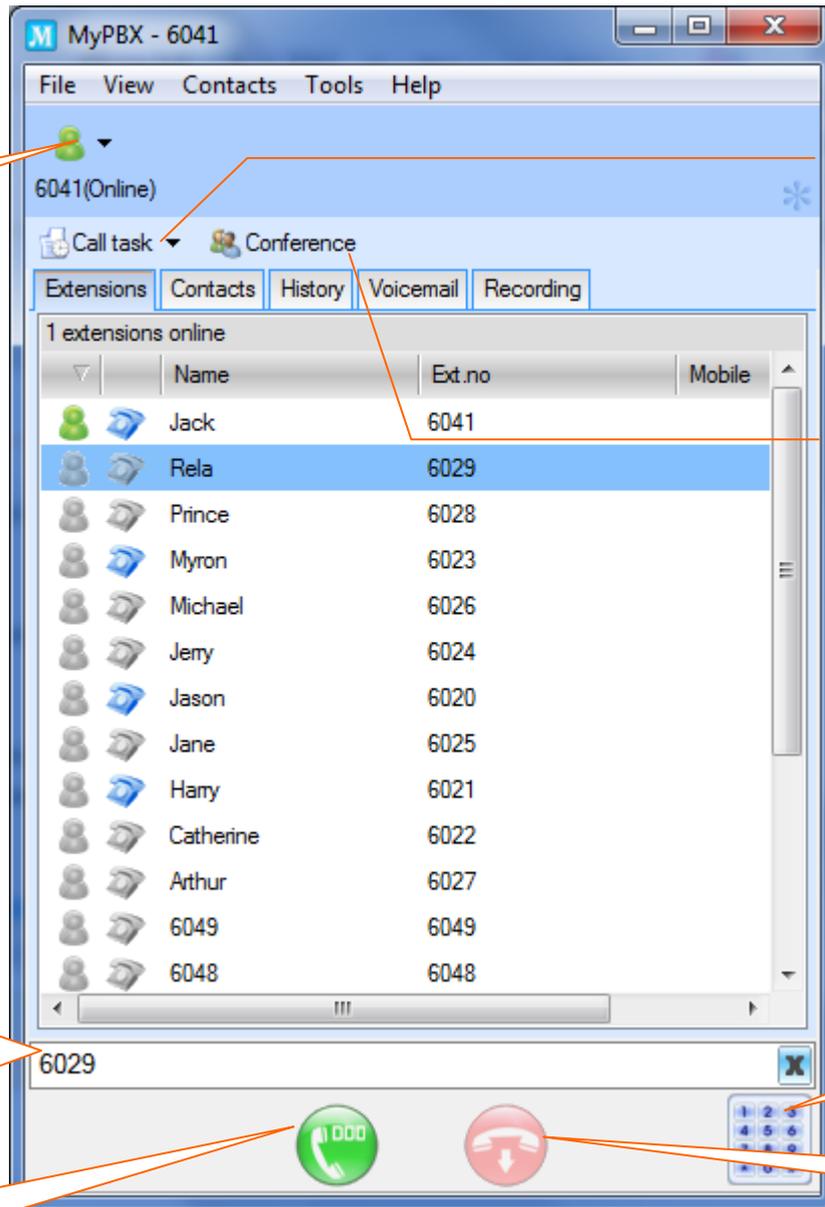
**Note:** On Sign in screen, you can also enable following settings:

- Sign me in when Client starts
- Start Client when computer starts

## 4 Managing MyPBX Client

### 4.1 Extension Management

When sign in MyPBX, system opens a main screen → Extension screen as Figure 4-1 shows.



Here you can edit your profile.

**Call Task (pull-down)**  
You can create, show,

**Conference**  
Open a conference window with selected

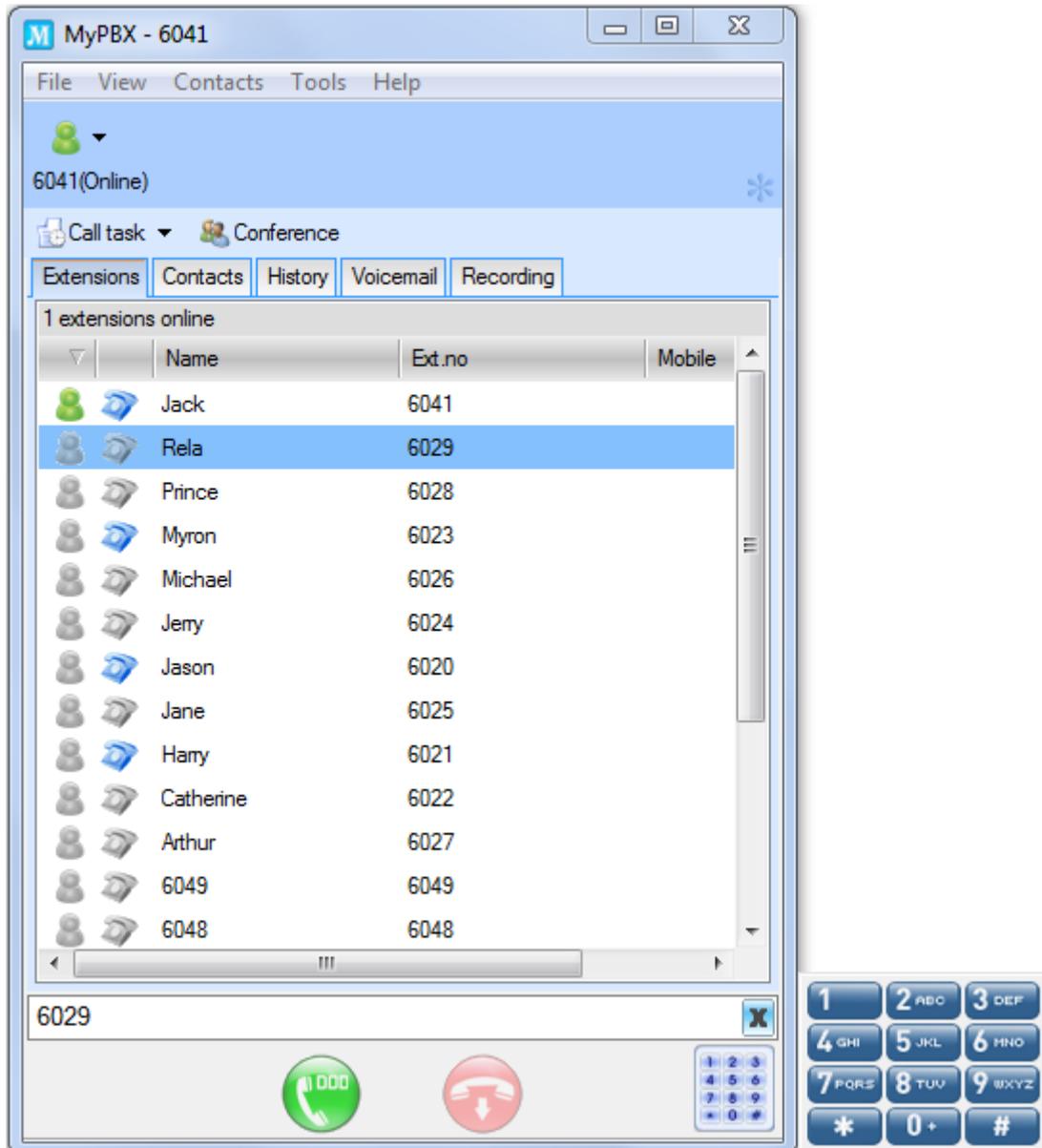
Enter the ext. number you want to call here, or choose a dialed number through the pull-down

Click here you can show or hide keyboard (Figure

Call button, call the number entered in the

End call

(Figure 4-1)

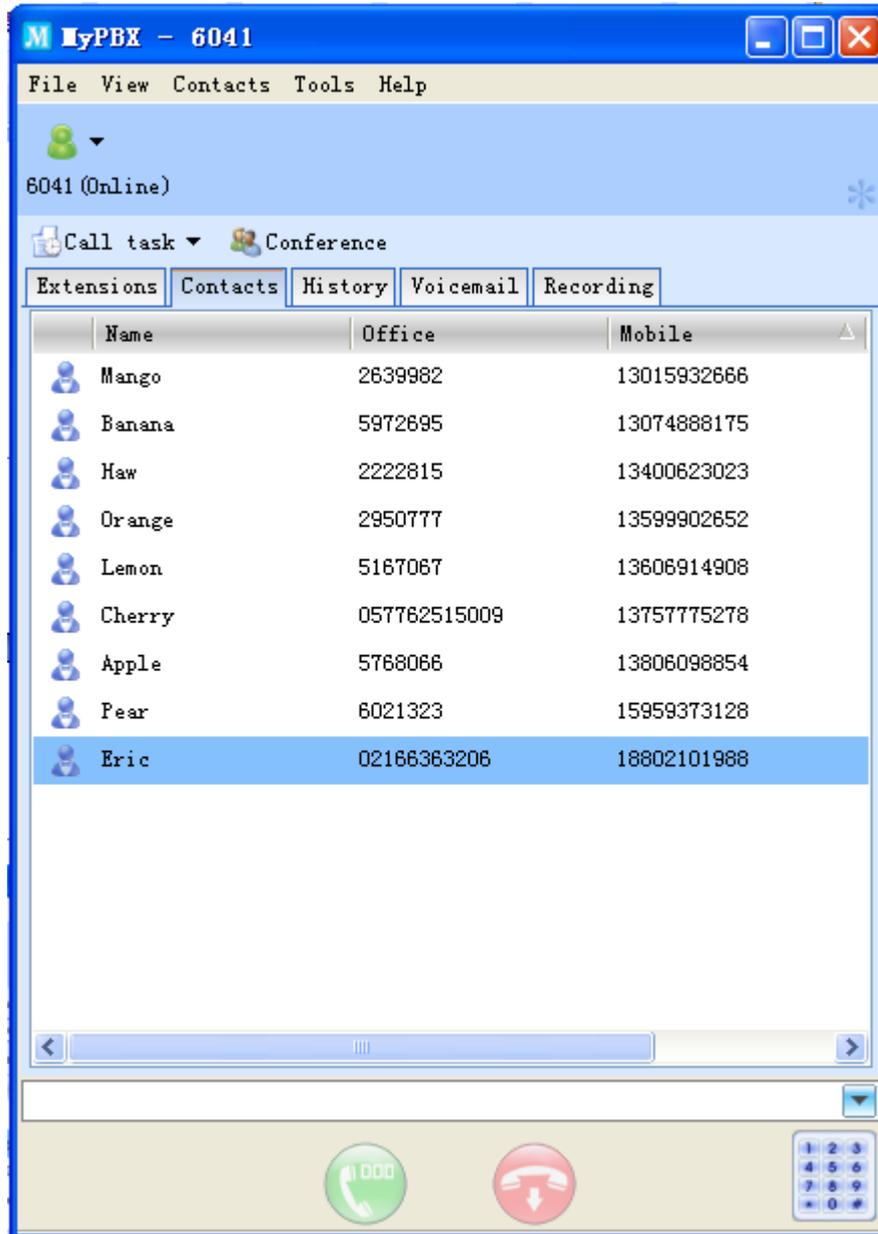


(Figure 4-2)

-  Indicates client user is offline
-  Indicates client user is online
-  Indicates extension is unregistered or unavailable
-  Indicates extension is idle
-  Indicates extension is ringing
-  Indicates extension is busy

## 4.2 Contacts Management

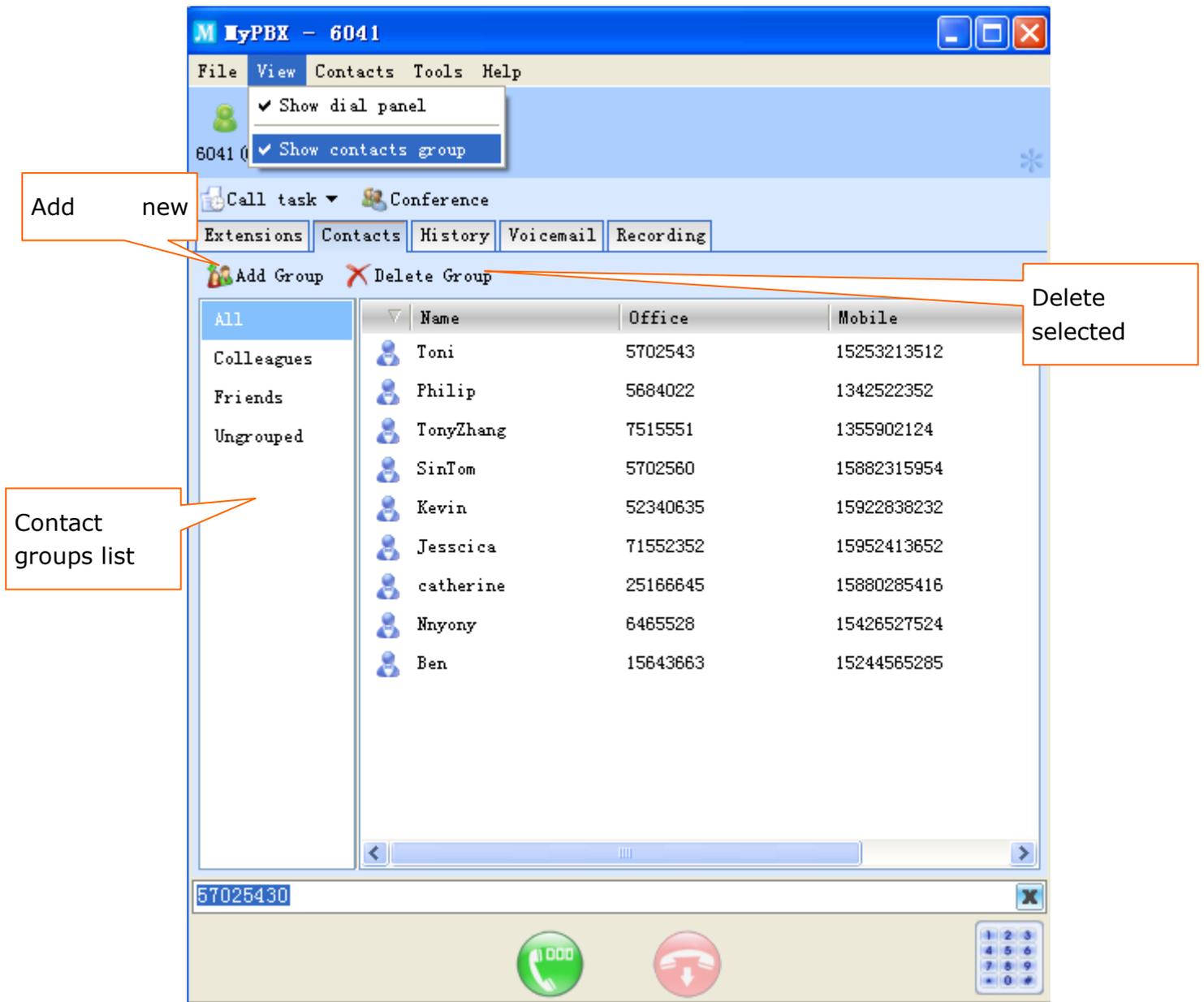
After signed in MyPBX Client, you can see “Contacts” tag as Figure 4-3 shows. Here, you can add, edit, delete, send, import and export your private contacts.



(Figure 4-3)

### 4.2.1 Contacts Group Management

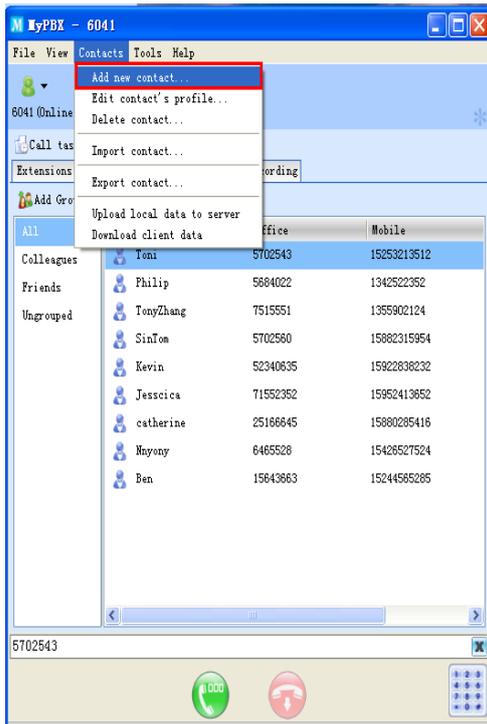
You can see contacts in group through “View” → “Show Contacts Group” (see Figure 4-4).



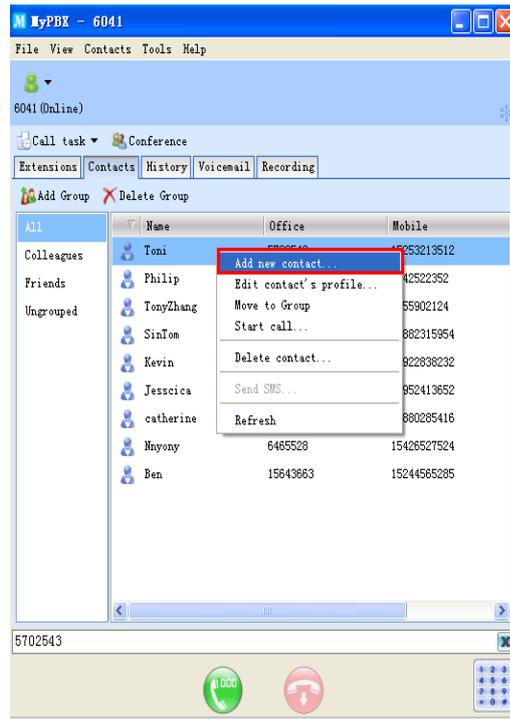
(Figure 4-4)

#### 4.2.2 Add New Contact

1. You can add new contact through Menu→Add New Contact (Figure 4-5a) or click the mouse to open the adding screen as Figure 4-5b shows.

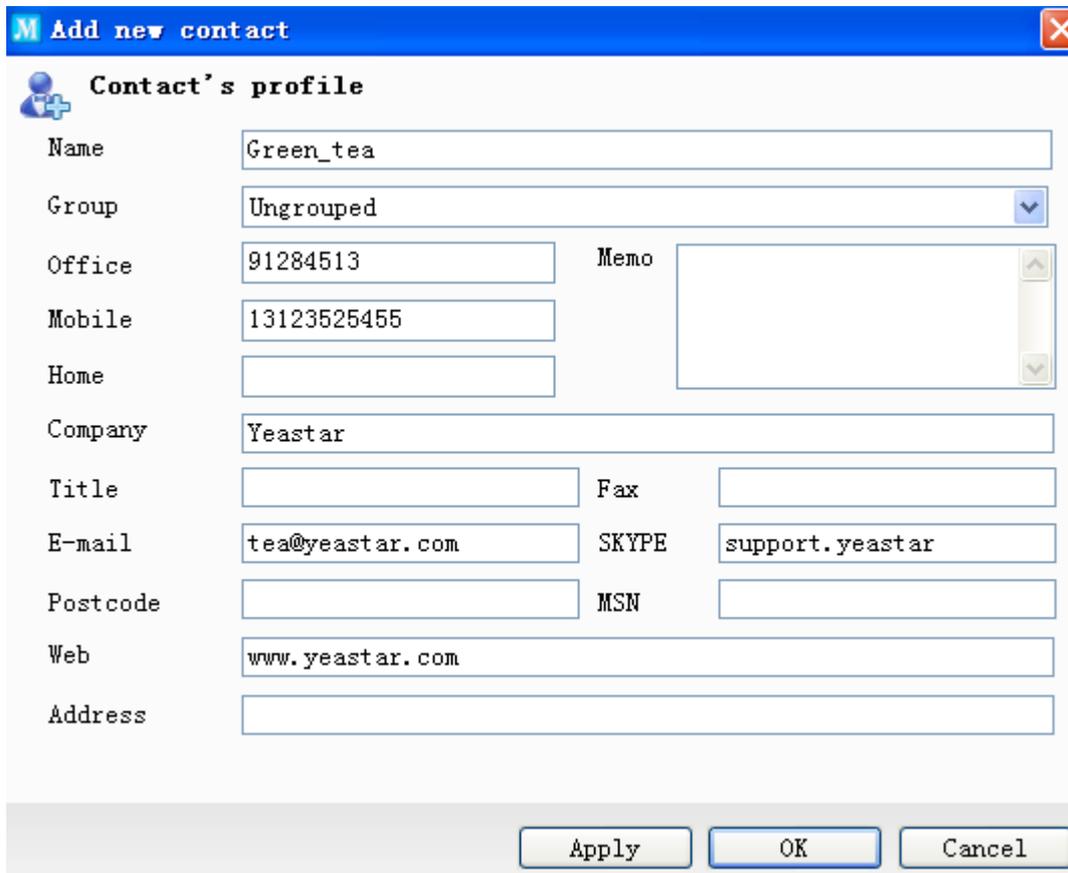


(Figure 4-5a)



(Figure 4-5b)

2. Please edit contact's profile on the following screen; the details include name, office phone, and company name and so on. (Figure 4-6)



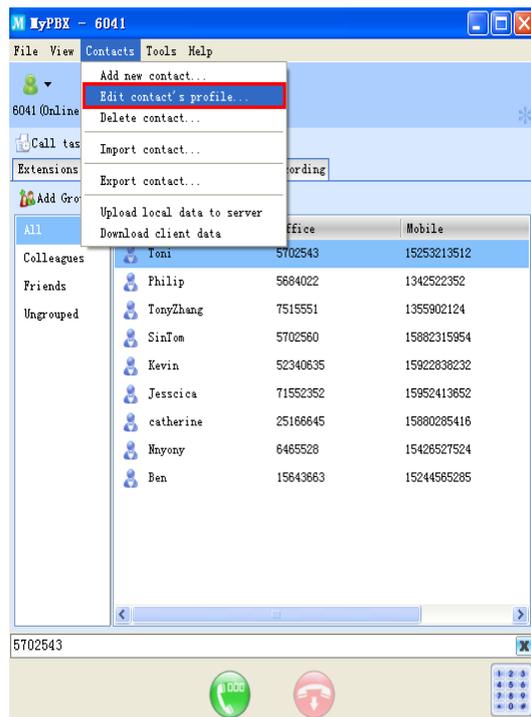
(Figure 4-6)

3. Click “Ok” or “Apply” to add new contact.

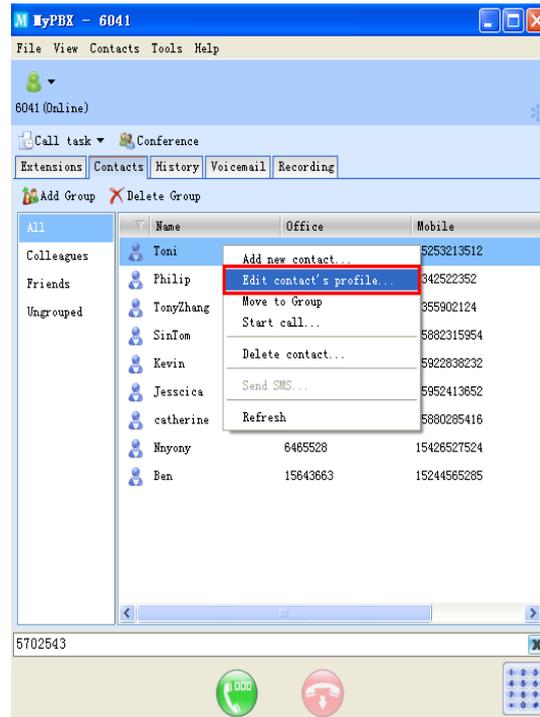
**Note:** On call history, right click on the item and from the menu you can “Save Number” to your contacts.

### 4.2.3 Edit Contact’s Profile

1. Click on the chosen contact, and open the “Contact” menu→ “Edit contact’s profile” as Figure 4-7a shows or right click to open the menu as Figure 4-7b shows.

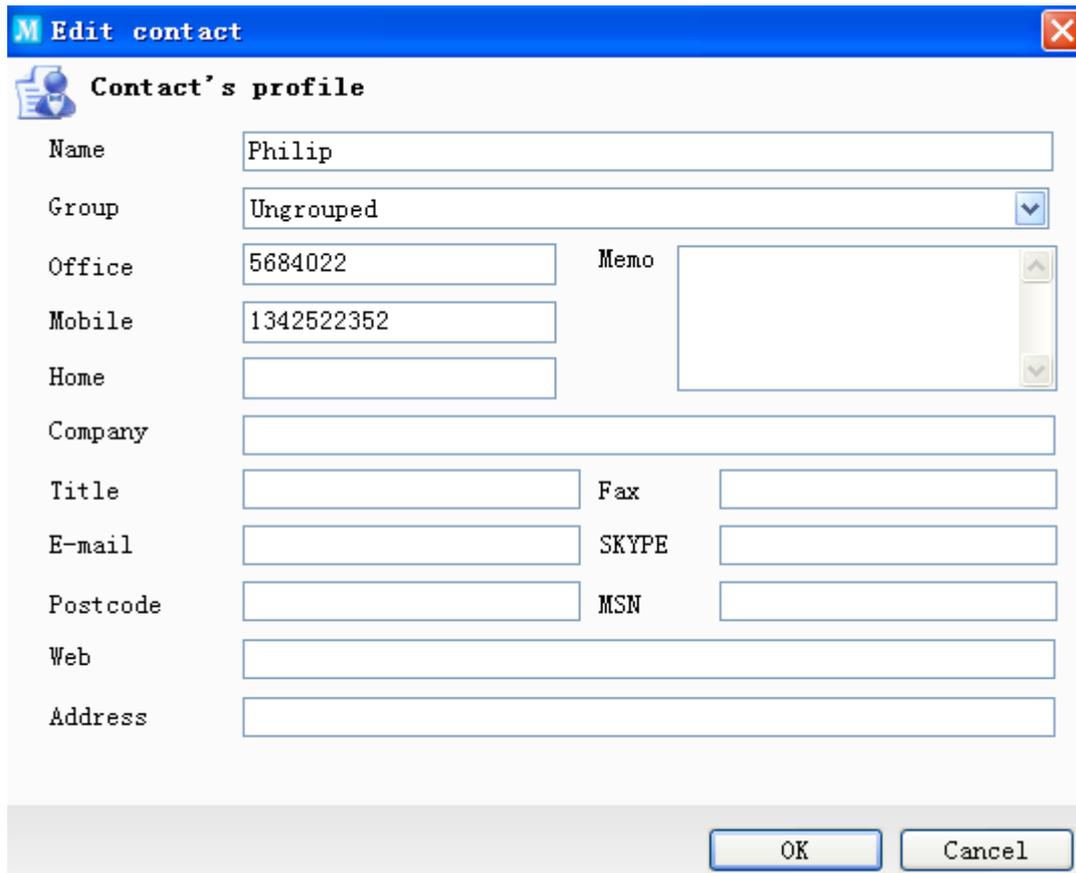


(Figure 4-7a)



(Figure 4-7b)

2. Here you can modify the contact’s information. See Figure 4-8.



The screenshot shows a window titled "Edit contact" with a close button in the top right corner. Below the title bar is a section labeled "Contact's profile" with a contact icon. The form contains the following fields:

Name	Philip		
Group	Ungrouped		
Office	5684022	Memo	
Mobile	1342522352		
Home			
Company			
Title		Fax	
E-mail		SKYPE	
Postcode		MSN	
Web			
Address			

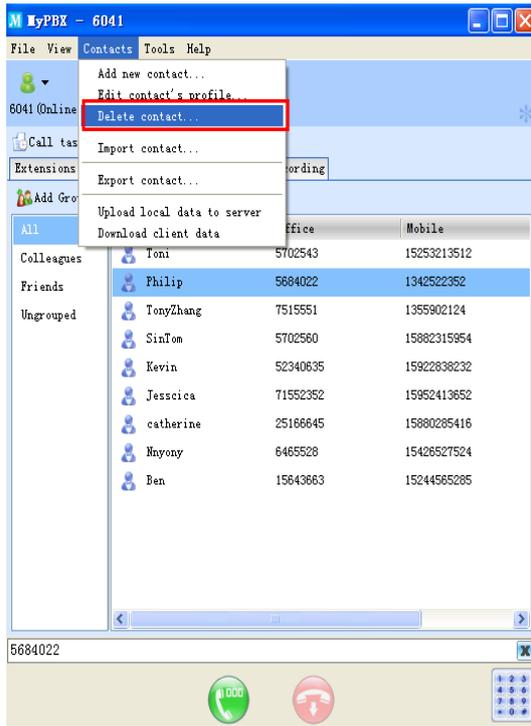
At the bottom right of the dialog are "OK" and "Cancel" buttons.

(Figure 4-8)

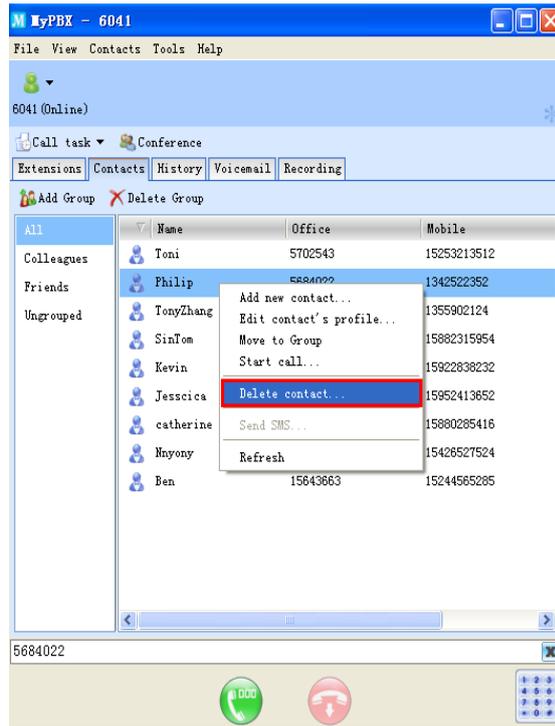
3. Click "OK" to save the changes.

#### 4.2.4 Delete Contact

1. You can delete the chosen contact through menu "Contacts" → "Delete contact" or click on right mouse to delete directly.

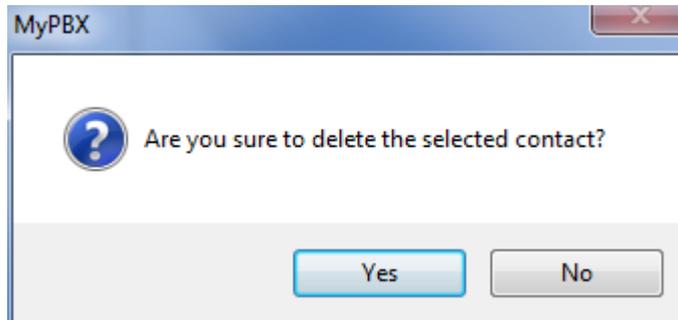


(Figure 4-9a)



(Figure 4-9b)

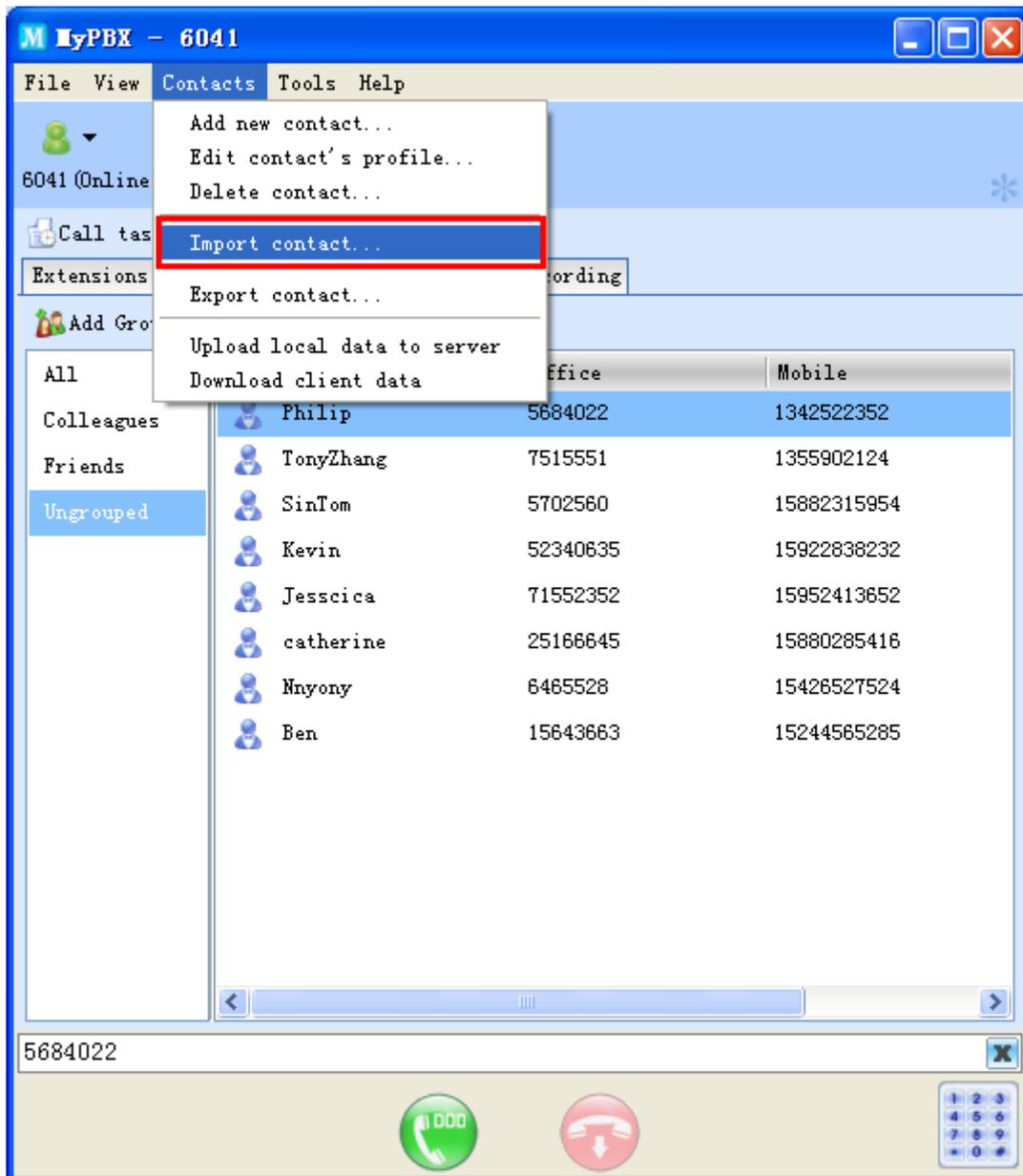
2. Click “Yes” to delete this contact as Figure 4-10 shows.



(Figure 4-10)

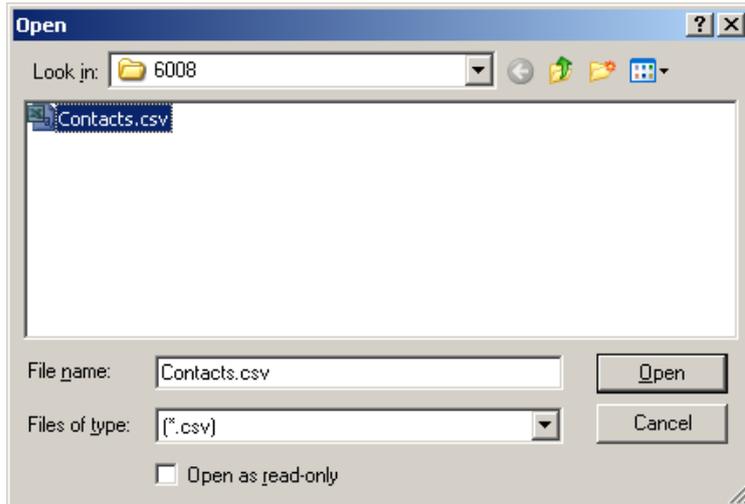
#### 4.2.5 Import Contact

1. You can import contacts from menu “Contacts” --> “Import Contact”.



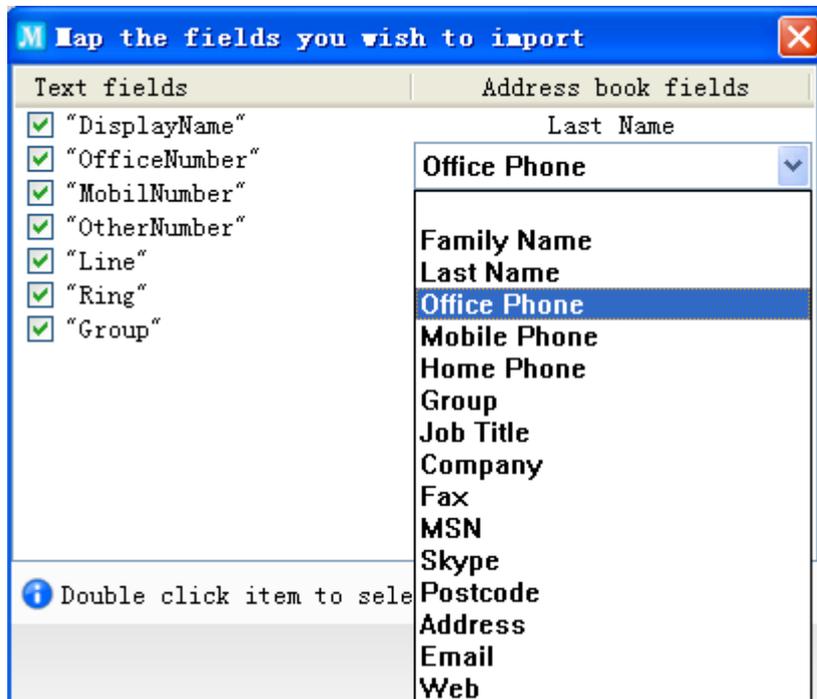
(Figure 4-11)

2. Select the file (.csv) you want to import and click "Open" button (figure 4-12).



(Figure 4-12)

3. Double click the item to select corresponding address, see Figure 4-13.

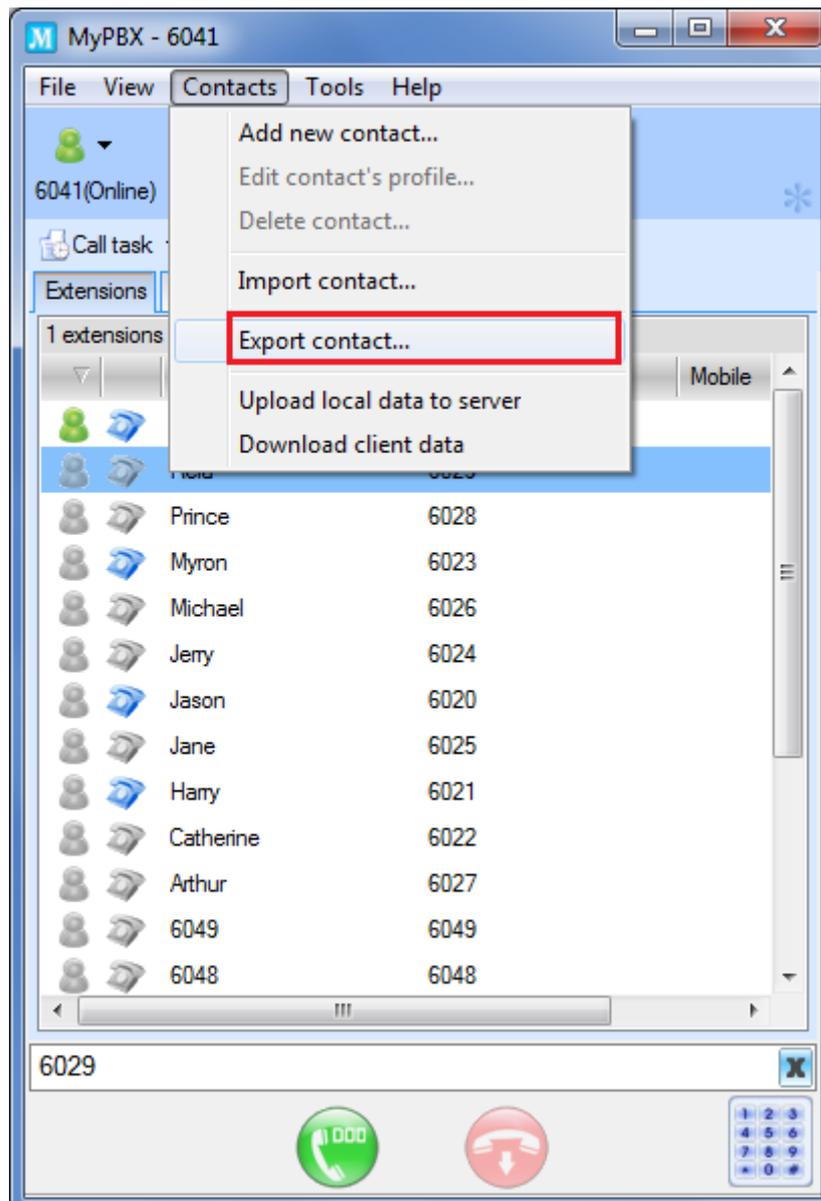


(Figure 4-13)

4. Click "OK" to finish this step.

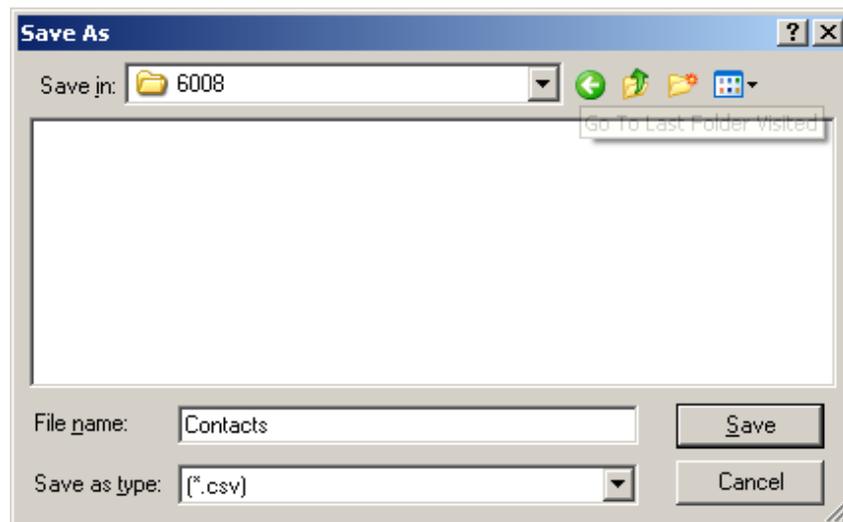
#### 4.2.6 Export Contacts

1. You can export contacts to save on computer as well. See Figure 4-14.



(Figure 4-14)

2. Select the routing that you want to save, and then click "Save" to finish as Figure 4-15 shows.

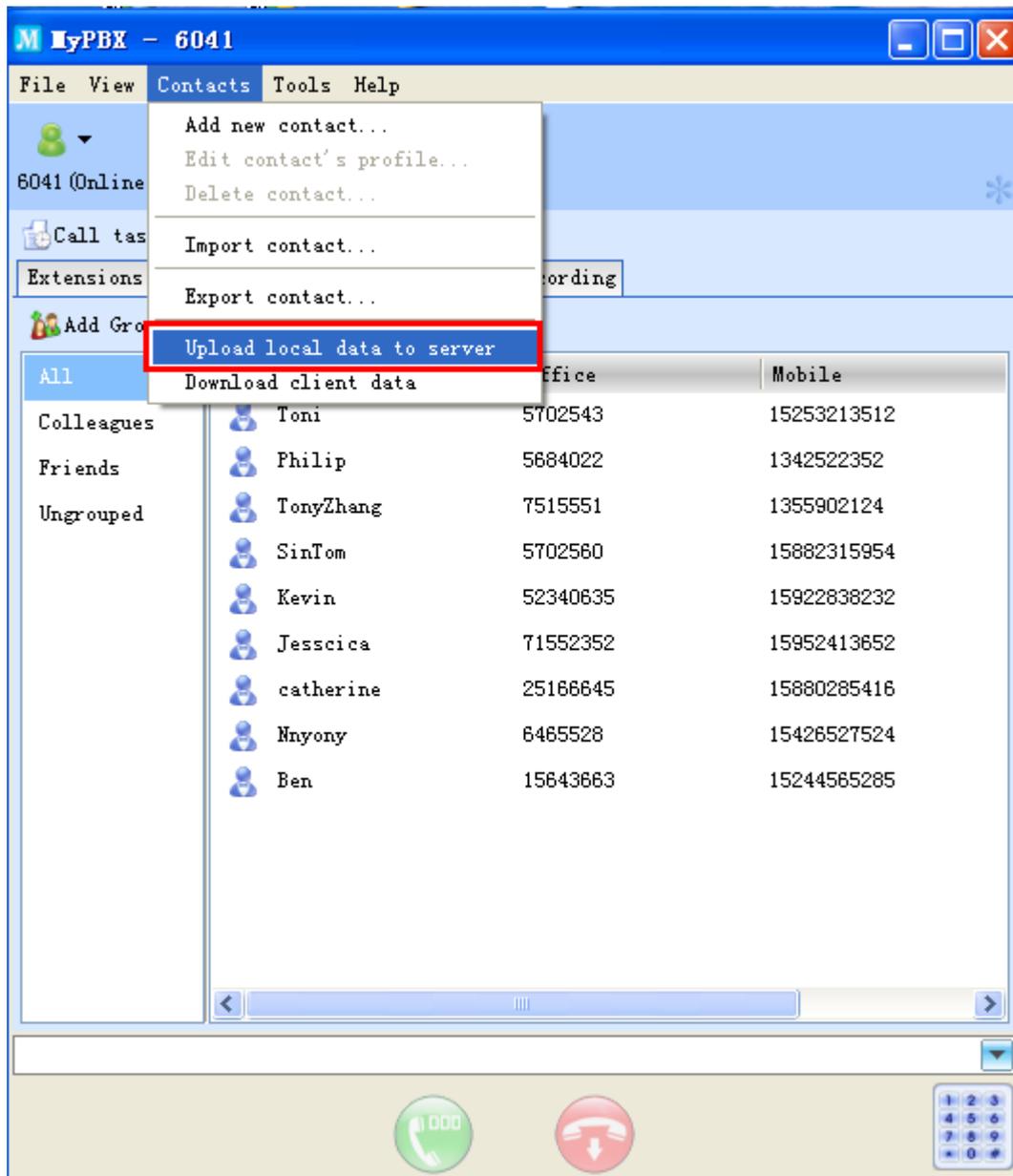


(Figure 4-15)

#### 4.2.7 Upload local data to server

You can upload local data to MyPBX server to save it. See Figure 4-16.

**Note:** If you have uploaded local data to MyPBX server and you want to upload it again, your data on MyPBX server will be covered with new data.

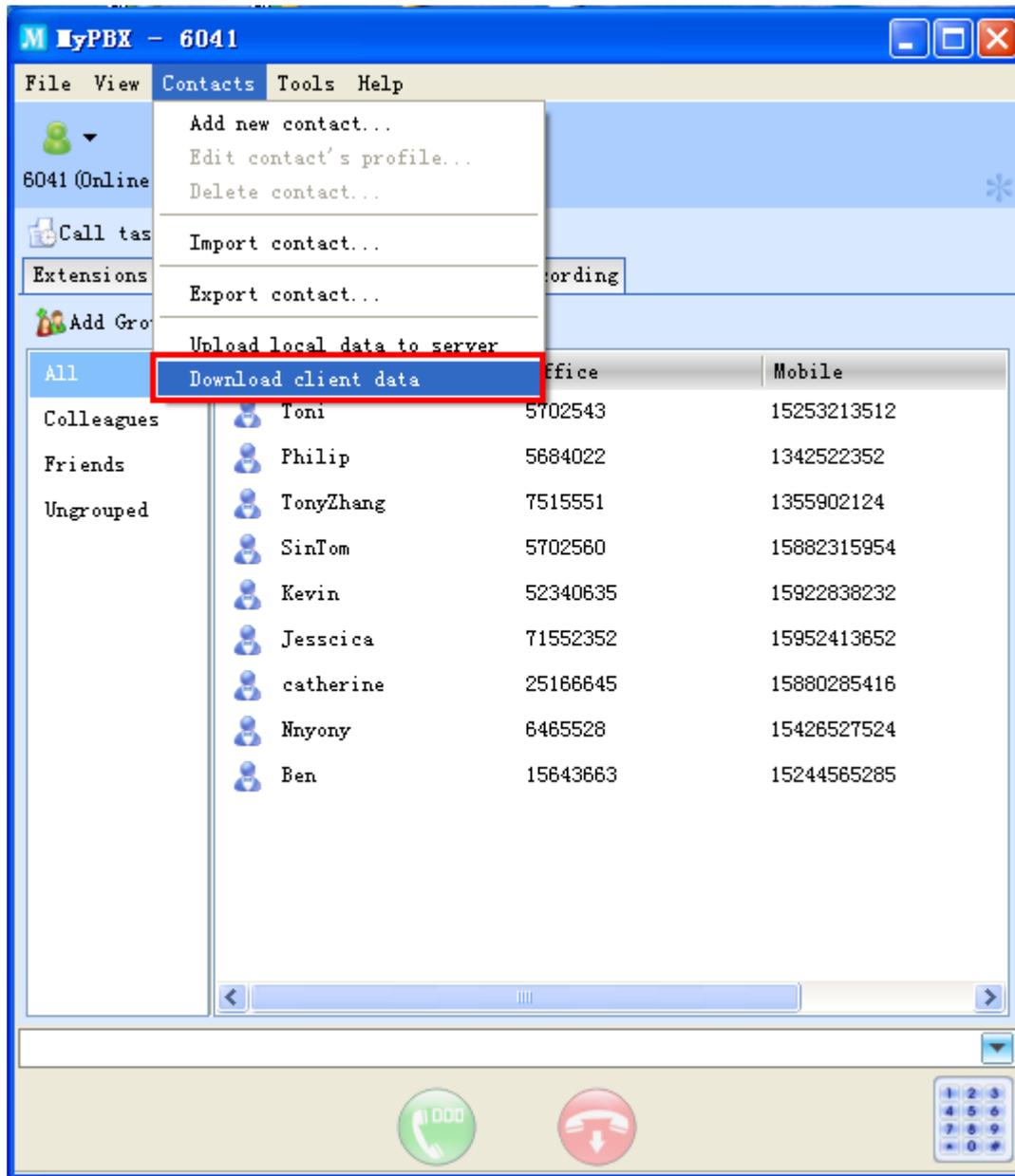


(Figure 4-16)

#### 4.2.8 Download client data

Since you have uploaded local data to MyPBX server, the next time you change a PC to log in MyPBX Client, you can download client data from MyPBX server using the same username. The operation is also used in case of losing data.

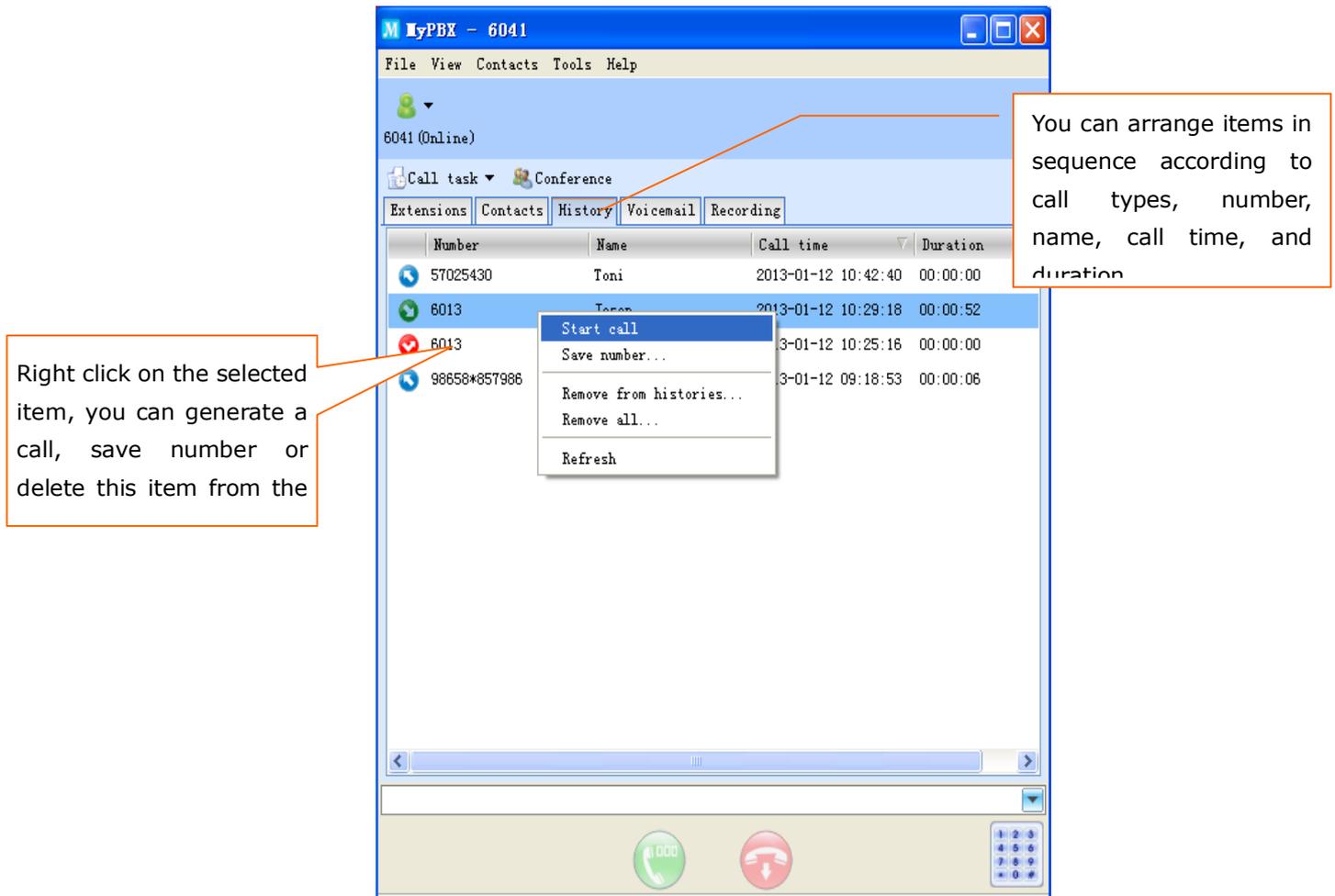
**Note:** If you download client data, the local data on PC will be covered.



(Figure 4-17)

### 4.3 Call History

After signed in MyPBX Client, click "History" tag to enter the call log screen (Figure 4-18). Here you can see all the calls that have you made or answered. Call information including callee name, telephone number, call time, and duration will be available on the list.

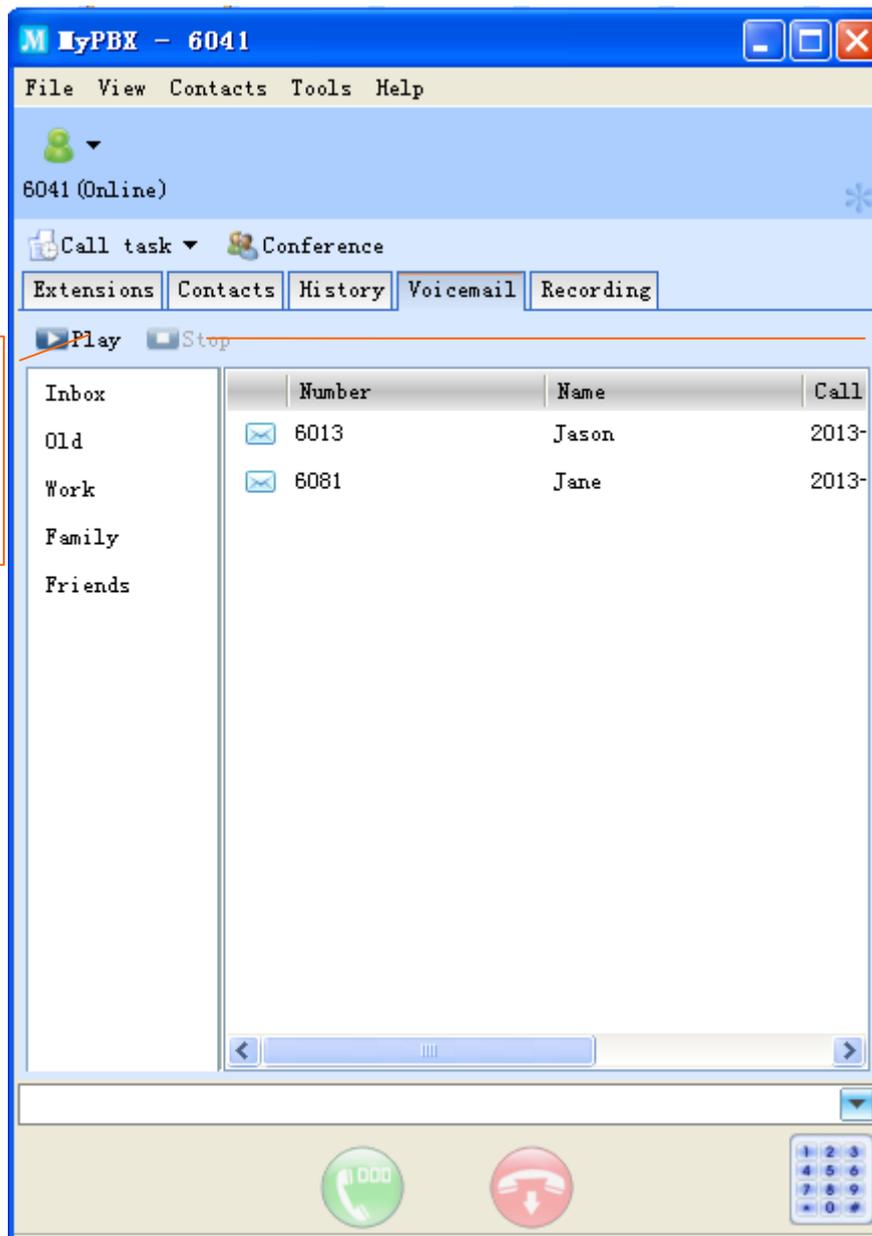


(Figure 4-18)

- Stands for incoming call
- Stands for outgoing call
- Stands for missed call

## 4.4 Voicemail Management

After signed in MyPBX Client, click “Voicemail” tag to enter the voicemail listing screen (Figure 4-19). Here you can see all the caller number, name, call time, and duration.

**Play**

Play selected voicemail. When playing, click the button to pause it.

**Stop Button**

Click this button to stop the playing.

(Figure 4-19)

 Unread message

 Read message

Inbox: the folder where new message is stored

Old: after reading the message, the message will be automatically moved to this folder

Work: after reading the message, the message can be moved to this folder

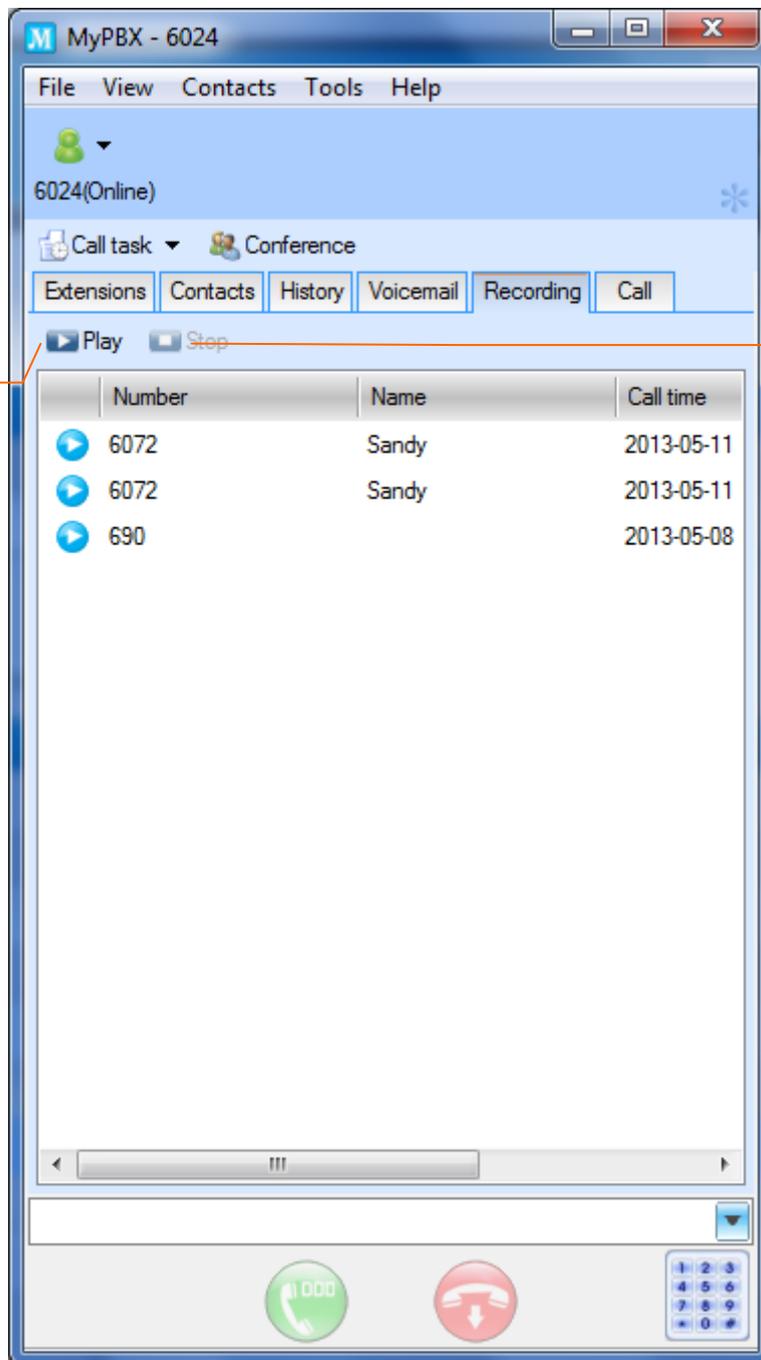
Family: after reading the message, the message can be moved to this folder

Friend: after reading the message, the message can be moved to this folder

**Note:** You can call the number, save or delete the voicemail through right-clicking, but you can't directly move the message to other folders.

## 4.5 Recording Management

After signed in MyPBX Client, click the “Recording” tag to enter the calls reading list screen (Figure 4-20). Here you can see all the status, call time, and duration.



### Play

Play selected recording. When playing, click the button to pause it.

### Stop Button

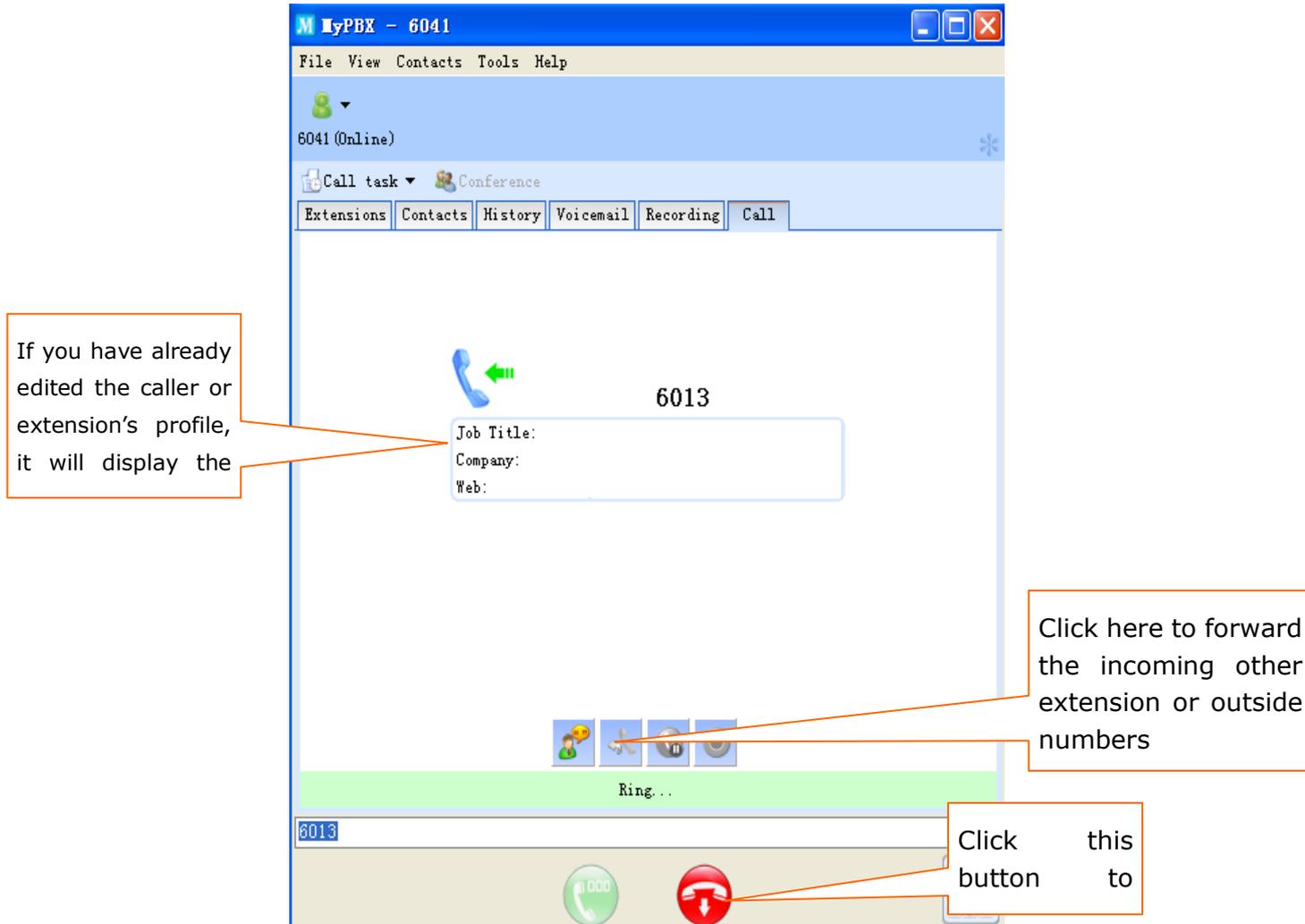
Click this button to stop the recording of the

(Figure 4-20)

**Note:** You can call the number, save or delete the recording through right-clicking.

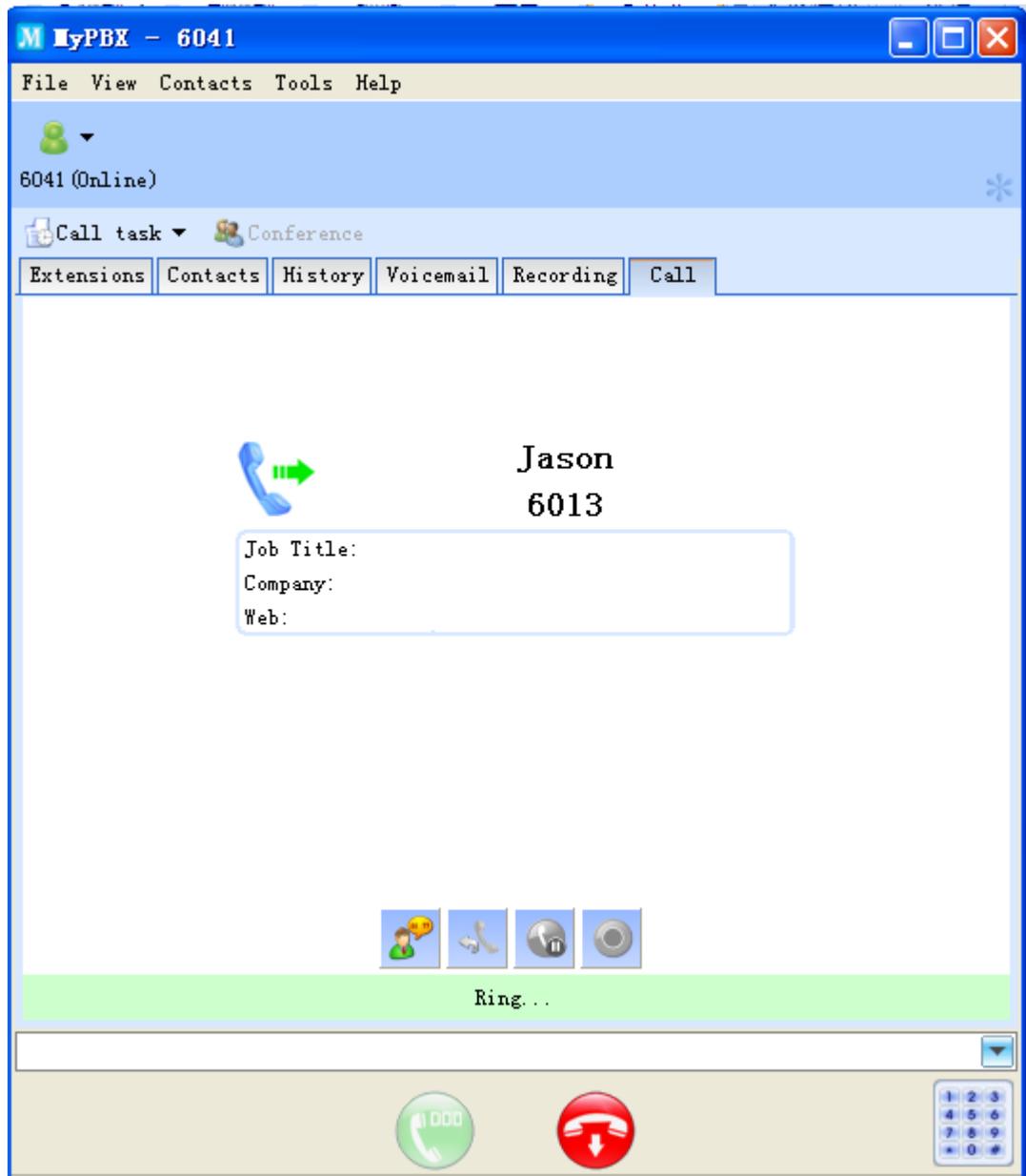
## 4.6 Call Status Management

1. When there's an incoming call, a prompt screen will show the caller's detailed information.



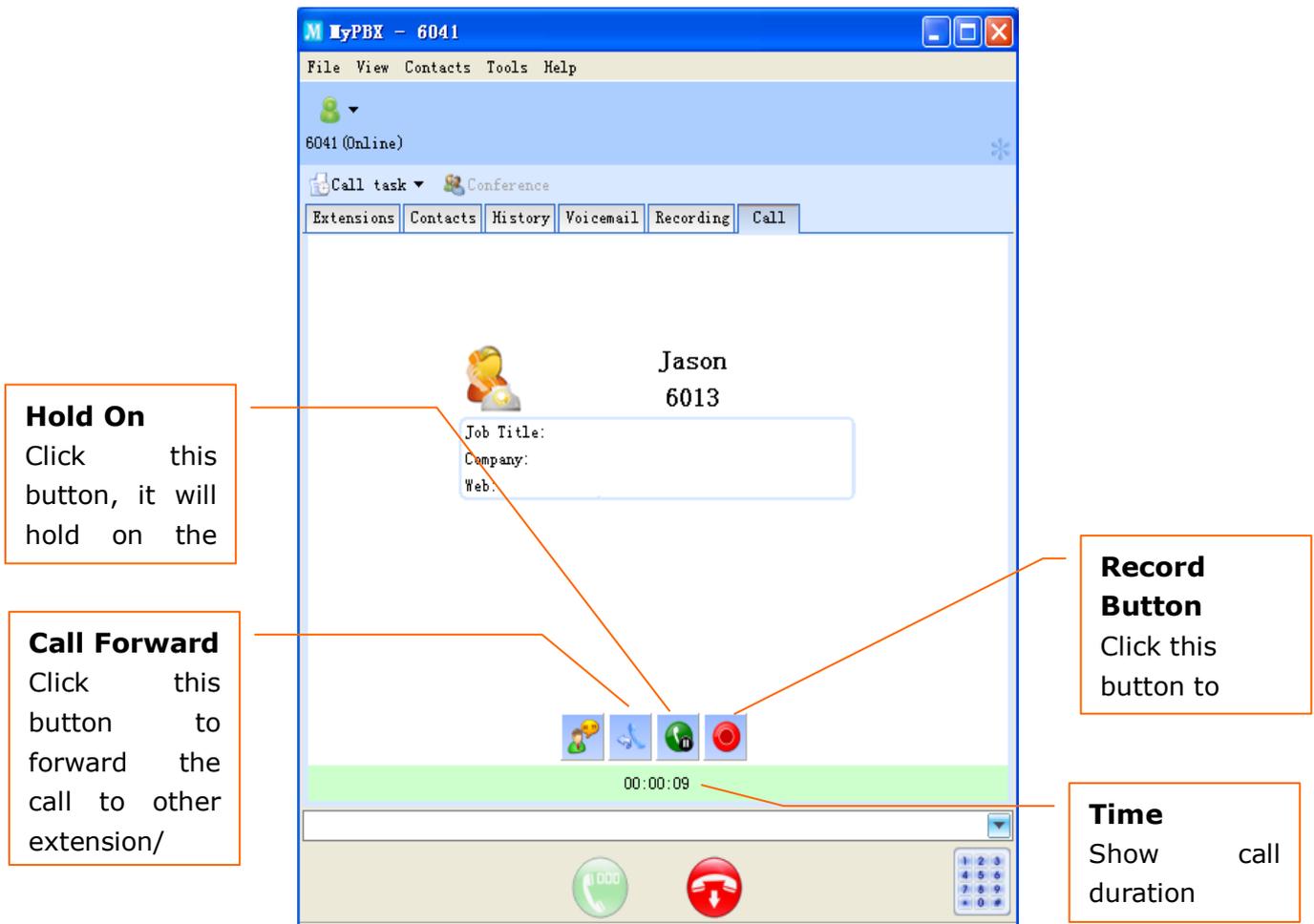
(Figure 4-21)

2. When there's an outgoing call, a prompt window will show the callee's detailed information.



(Figure 4-22)

3. During a call, it prompts as Figure 4-23 shows.

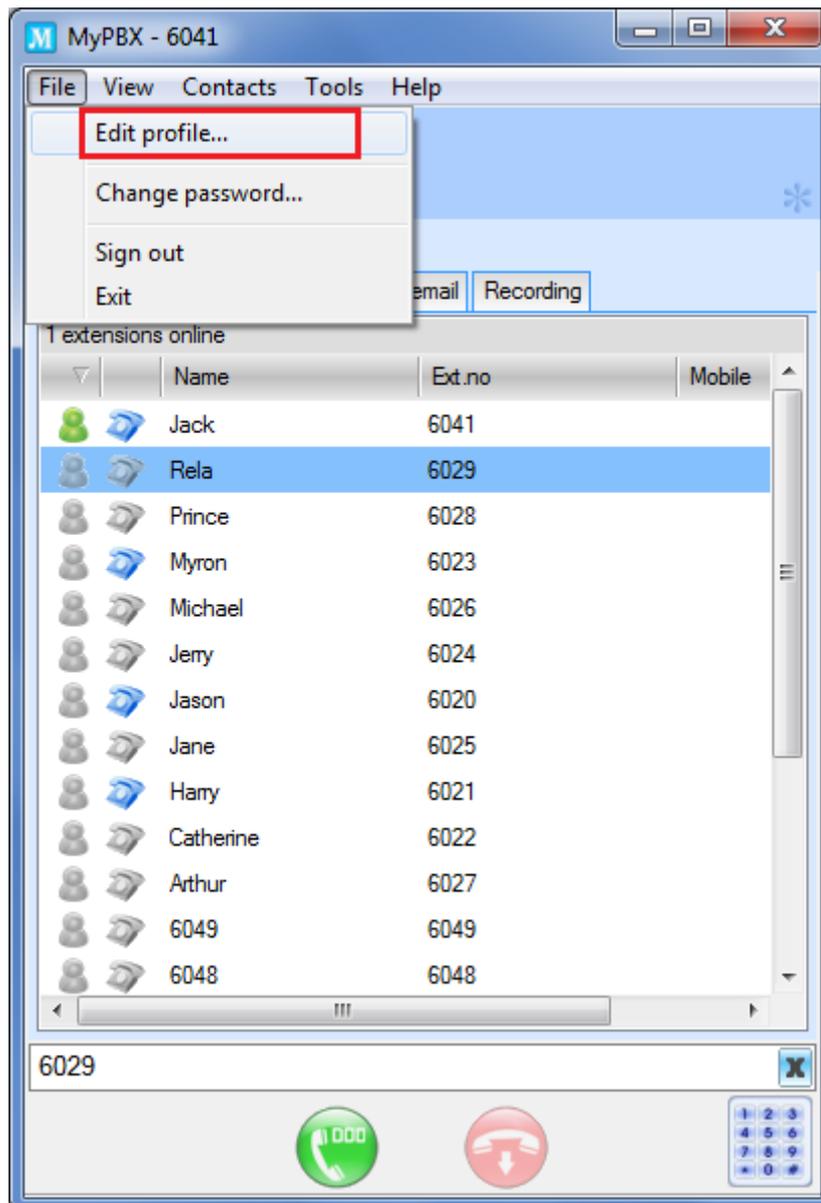


(Figure 4-23)

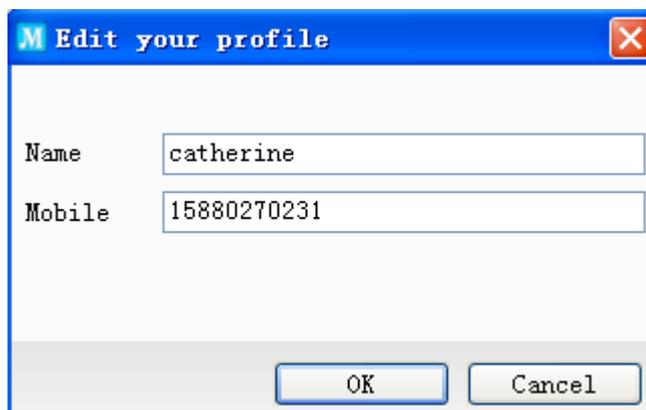
## 4.7 Personal Profile

For the convenient communication with your colleagues and friends, MyPBX Client provides personal information management, so that you can update profile at any time.

After signed in MyPBX Client, click "File" → "Edit profile" to open personal information screen.



(Figure 4-24)



(Figure 4-25)

Here you are allowed to change name, mobile phone number.

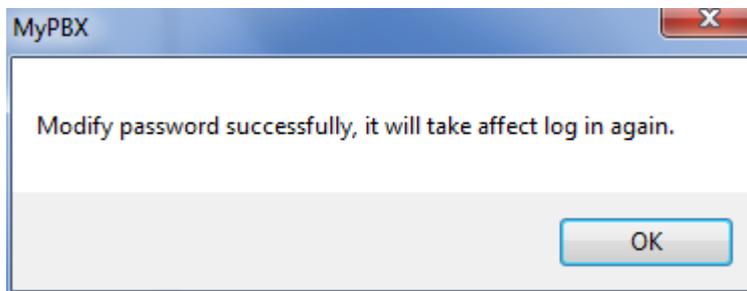
You can change password through "File" → "Change Password" setting as Figure 4-28 shows.

Open the password screen as Figure 4-26 shows and enter both the old and new password, after

which a pop-up will prompt you as Figure 4-27 shows.

A screenshot of a Windows-style dialog box titled "Change password". It has a blue title bar with a close button (X) on the right. The dialog contains three text input fields: "Old password" with "\*\*\*\*", "New password" with "\*\*\*\*", and "Repeat new password" with "\*\*\*\*". At the bottom, there are two buttons: "OK" and "Cancel".

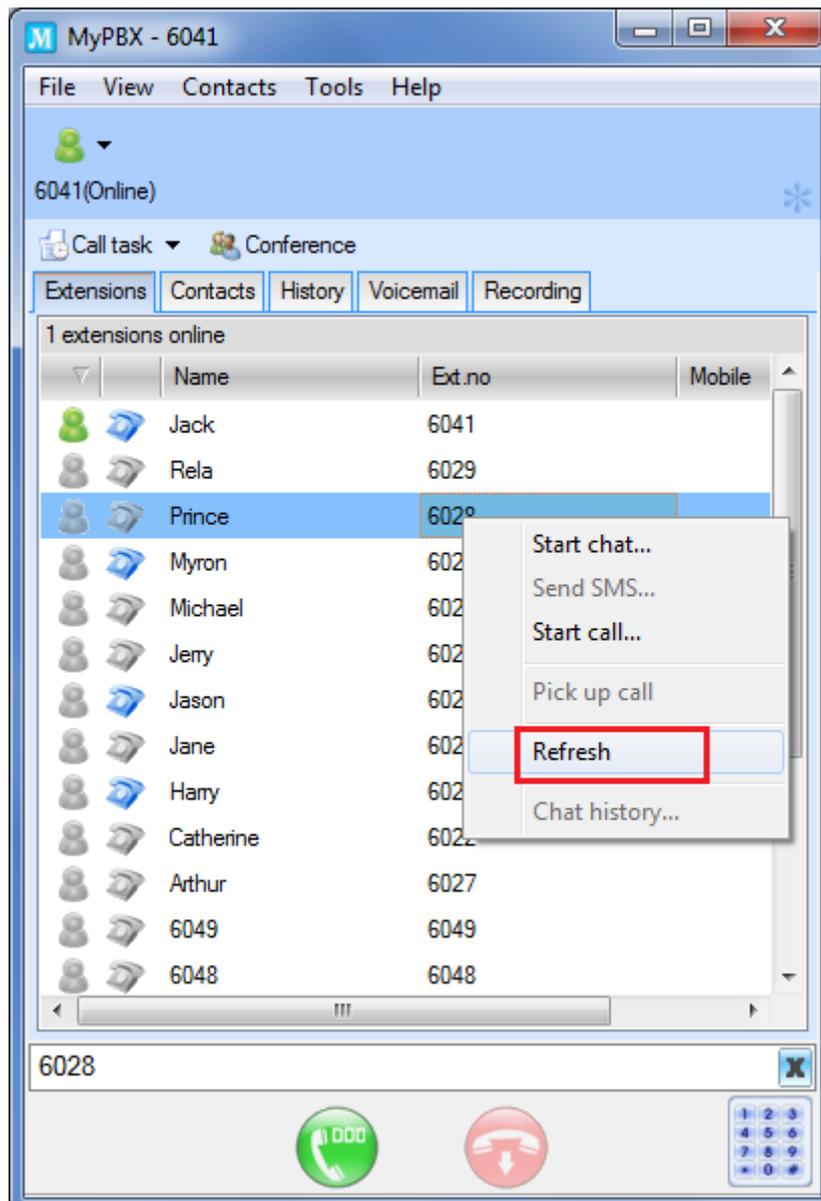
(Figure 4-26)

A screenshot of a dialog box titled "MyPBX". It has a blue title bar with a close button (X) on the right. The main area contains the text "Modify password successfully, it will take affect log in again." At the bottom right, there is an "OK" button.

(Figure 4-27)

## 4.8 Refresh

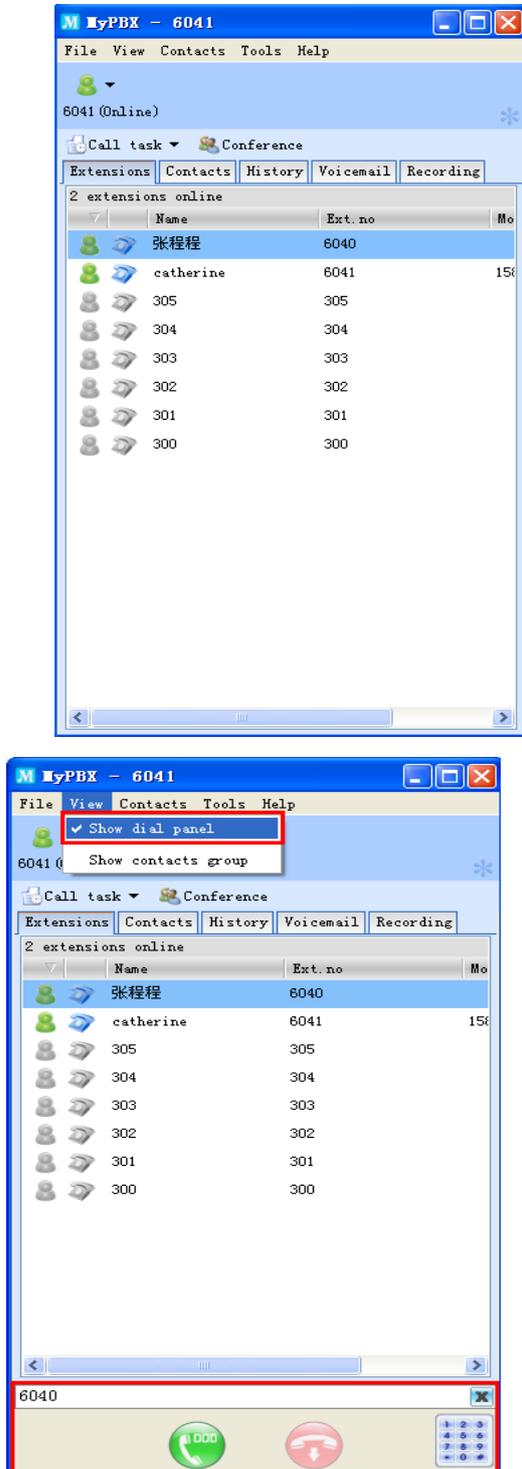
You can right click the mouse and click "Refresh" on menu as Figure 4-28 shows to gain the latest data. For example, the current page shows all extensions, MyPBX Client will get the extension information again after clicking "Refresh".



(Figure 4-28)

## 4.9 Show Dial Panel or Not

You can set up whether or not to show dial panel on menu "View" → "Show dial panel". (Figure 4-29)

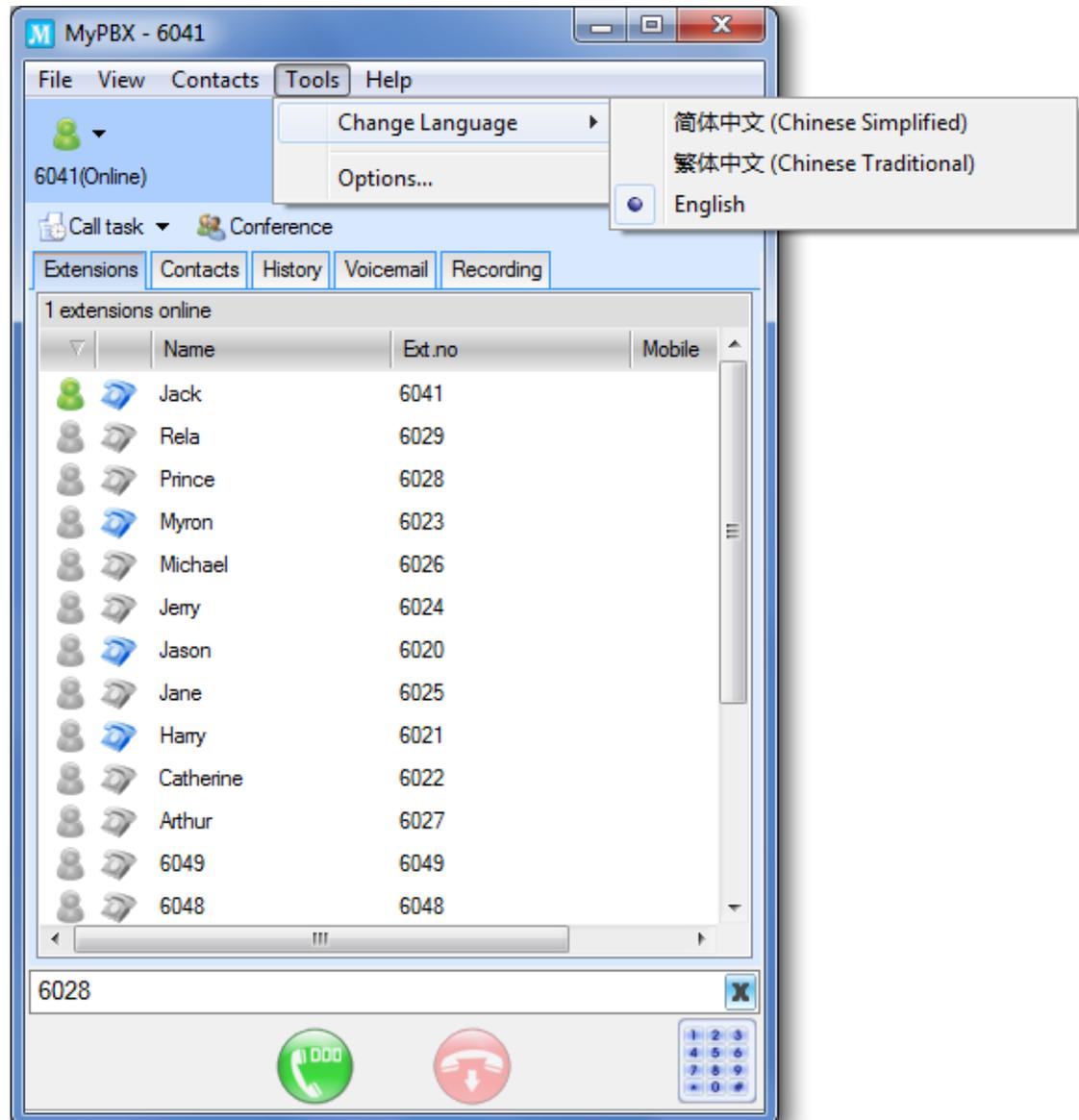


(Figure 4-29)



## 4.10 Change Language

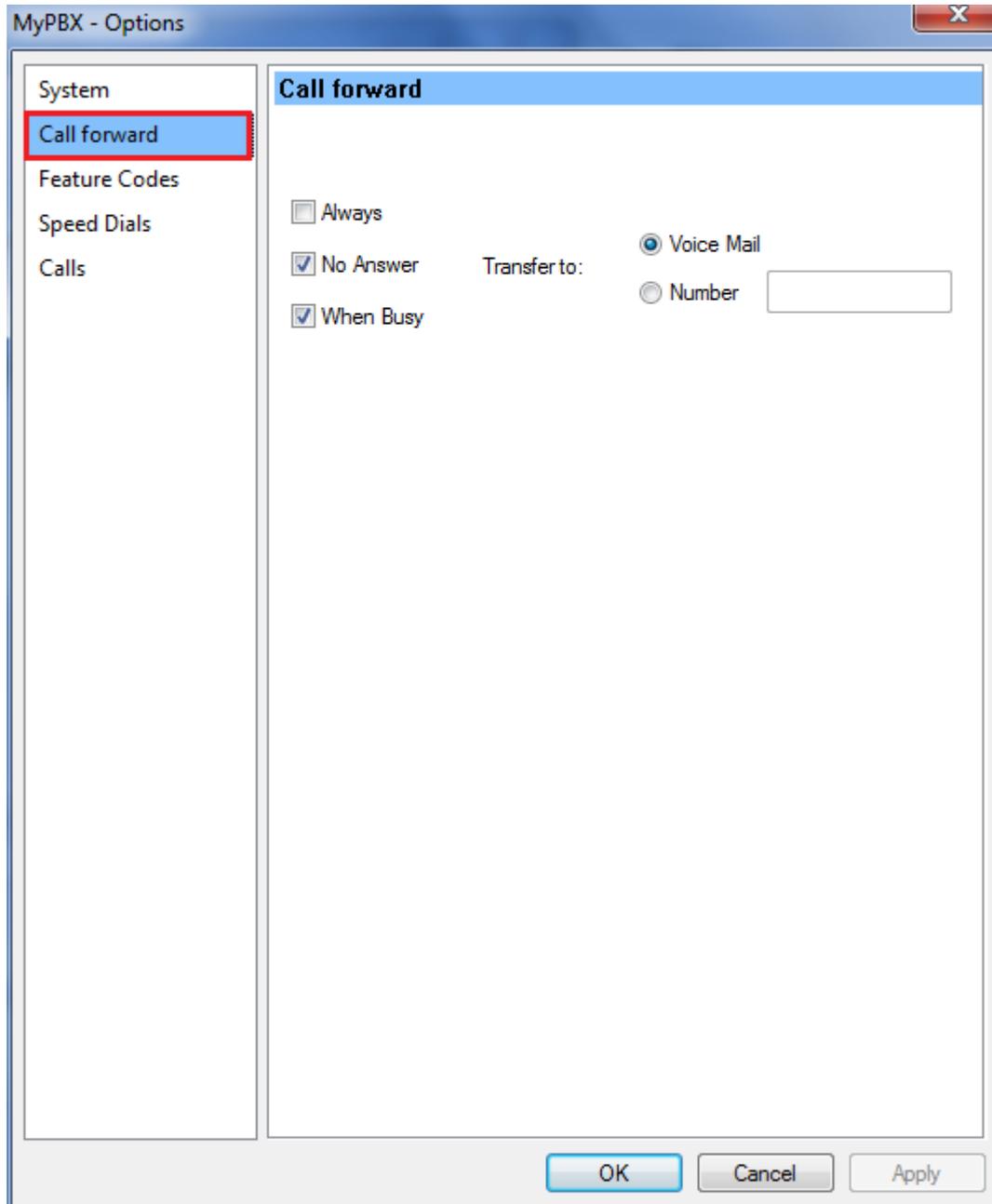
MyPBX Client has multiple language versions. You can change the Client language through “Tools” → “Change Language”. (See Figure 4-30)



(Figure 4-30)

## 4.11 Call Forwarding

You can forward incoming calls at any time. Configure it through “Tools” → “Options” (Figure 4-31).



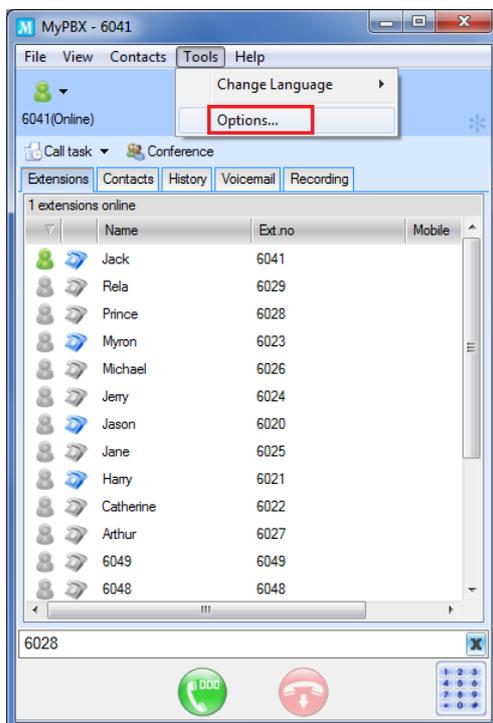
(Figure 4-31)

- Always: Always forward calls
- No answer: If no answer calls will be forwarded to
- When Busy: forward calls when you are busy in a call
- Transfer to: the incoming call will be transferred to “Voice Mail” or the designated “Number” according to your own demands.

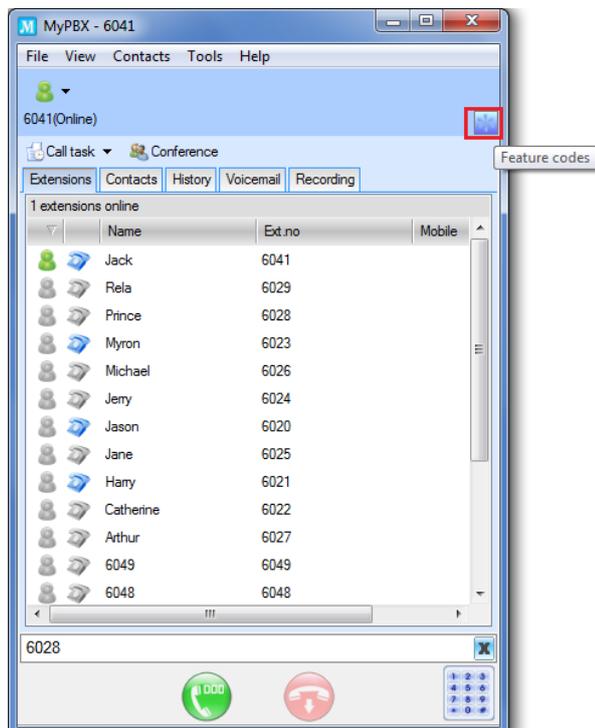
**Note: If call forwarding is set to external line number, please input the prefix before number. For example, “9” stands for PSTN trunk routing, “81” stands for SIP trunk routing, and “7” stands for Skype trunk.**

## 4.12 Feature Codes

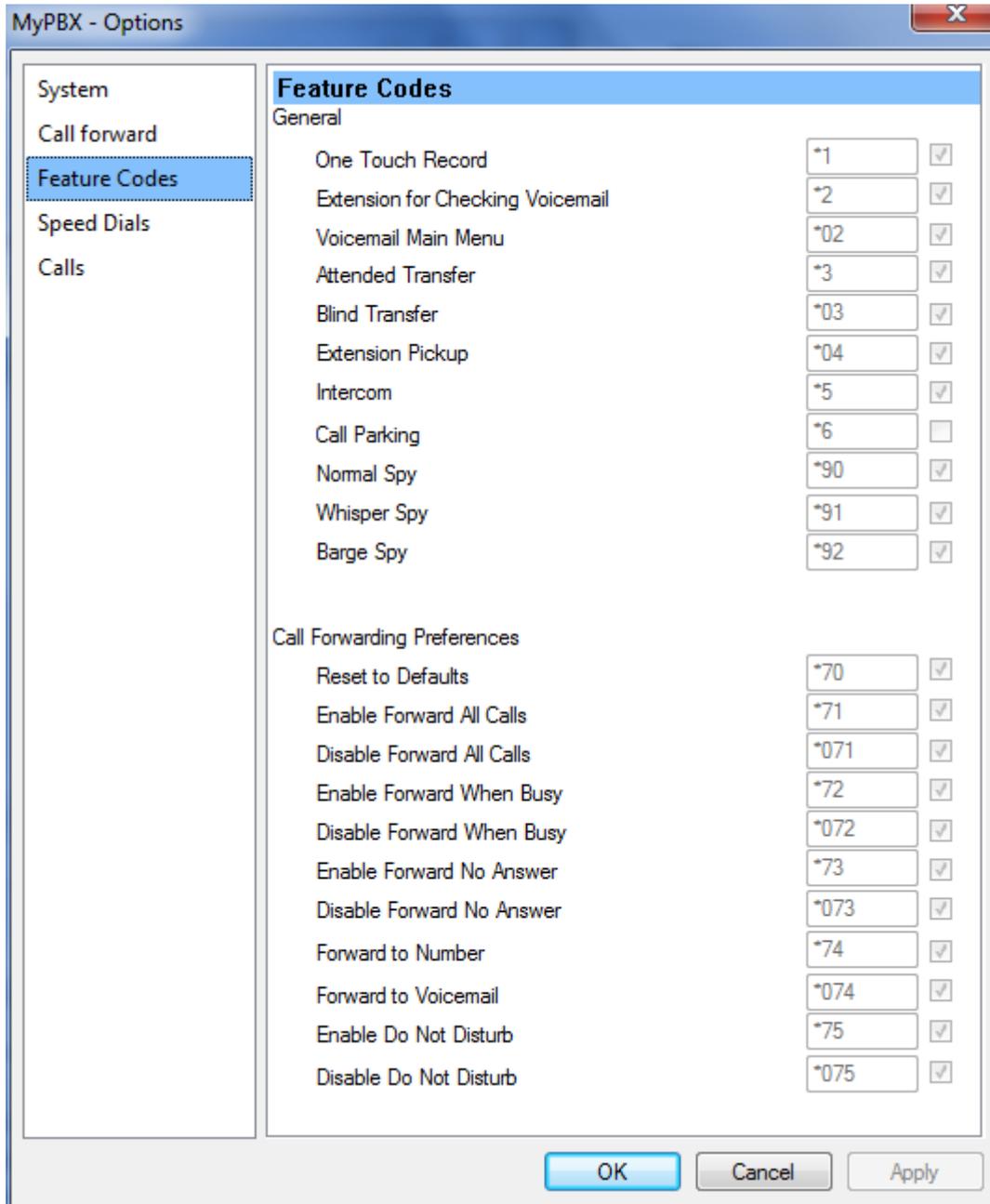
You can check the shortcut operation of call on hold, pick up calls and so on. Click on menu “Tools”→ “Options”→ “Feature Codes” (Figure 4-32a) or click on “Feature codes” on the interface directly as Figure 4-32b shows.



(Figure 4-32a)



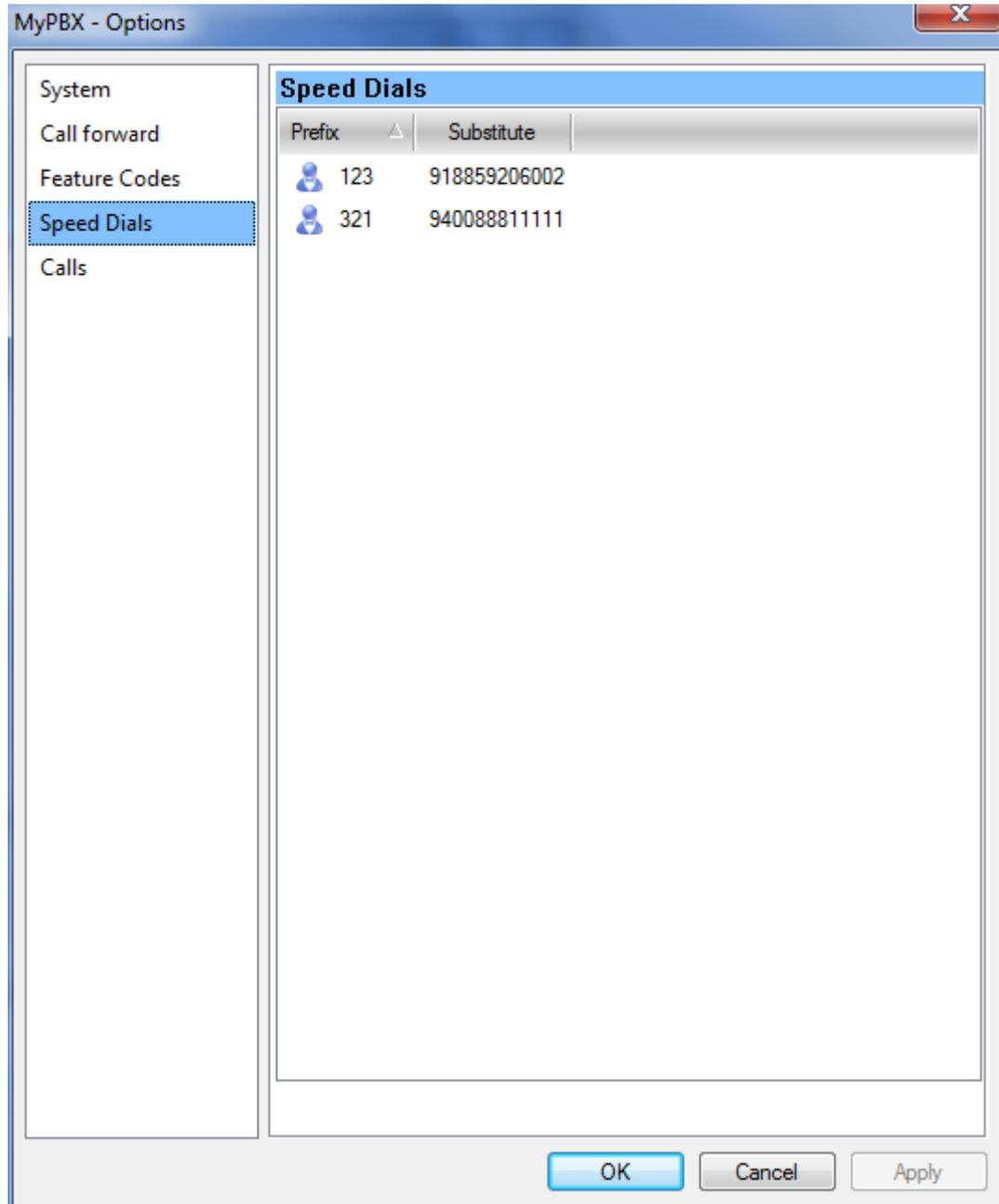
(Figure 4-32b)



(Figure 4-33)

### 4.13 Speed-dial

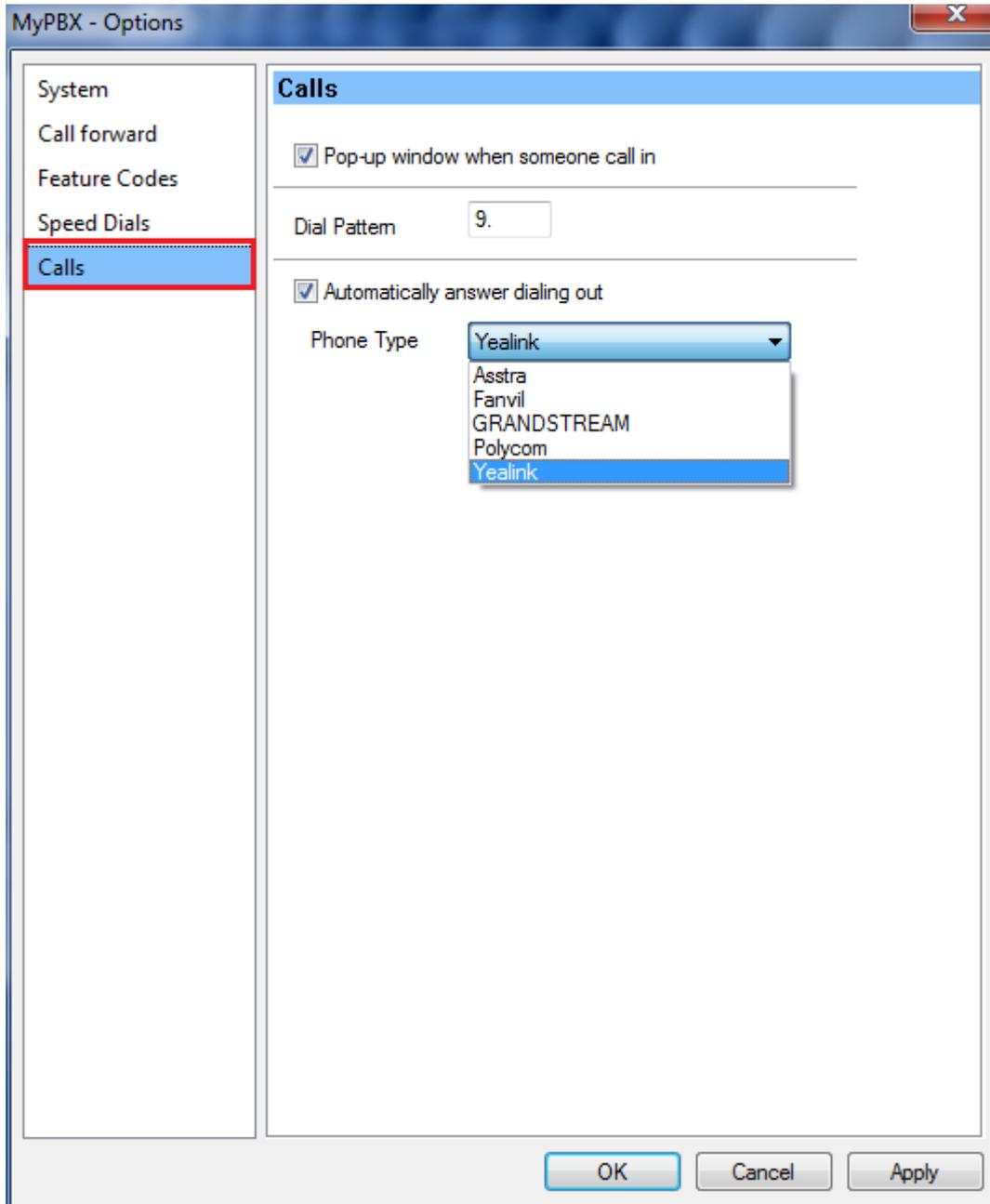
On menu “Tools”→ “Options”→ “Speed Dial”, you can check the speed-dial number on Figure 4-34. For example, if you want to call number 918859206002, then just dial 123 directly.



(Figure 4-34)

## 4.14 Calls

Through the menu “Tools” → “Options” → “Calls” to manage the calls.

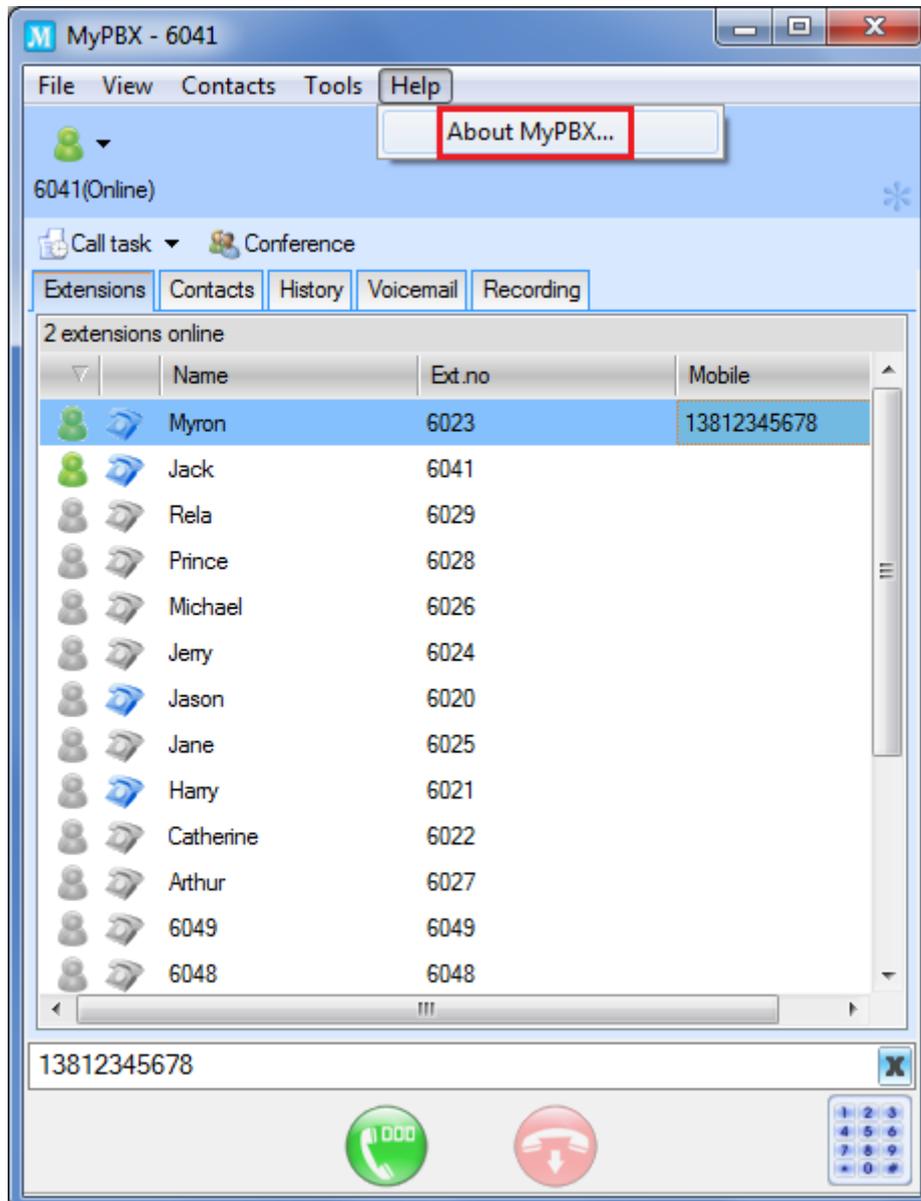


(Figure 4-35)

- Pop-up windows when someone call in: Client will bomb the caller's ID for an incoming call.
- Dial Pattern
- Automatically answer dialing out: When you enable this option and click a number to dial out, your IP phone will answer it first.

Note: You should select your IP phone type correctly. For example, if you are using Yealink IP phone, please select Yealink.

## 4.15 Help



(Figure 4-36)

### 4.15.1 About MyPBX Client

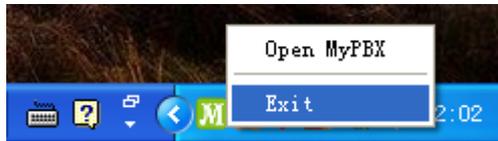
You can know the MyPBX Client version number and copyright through menu "Help" → "About MyPBX Client". See Figure 4-37.



(Figure 4-37)

## 4.16 Sign out & Exit

You can exit from MyPBX Client on menu "File" → "Exit" or you can click on MyPBX icon on right tray and click "Exit" to exit as Figure 4-38 shows.



(Figure 4-38)

## 5 Main Functions

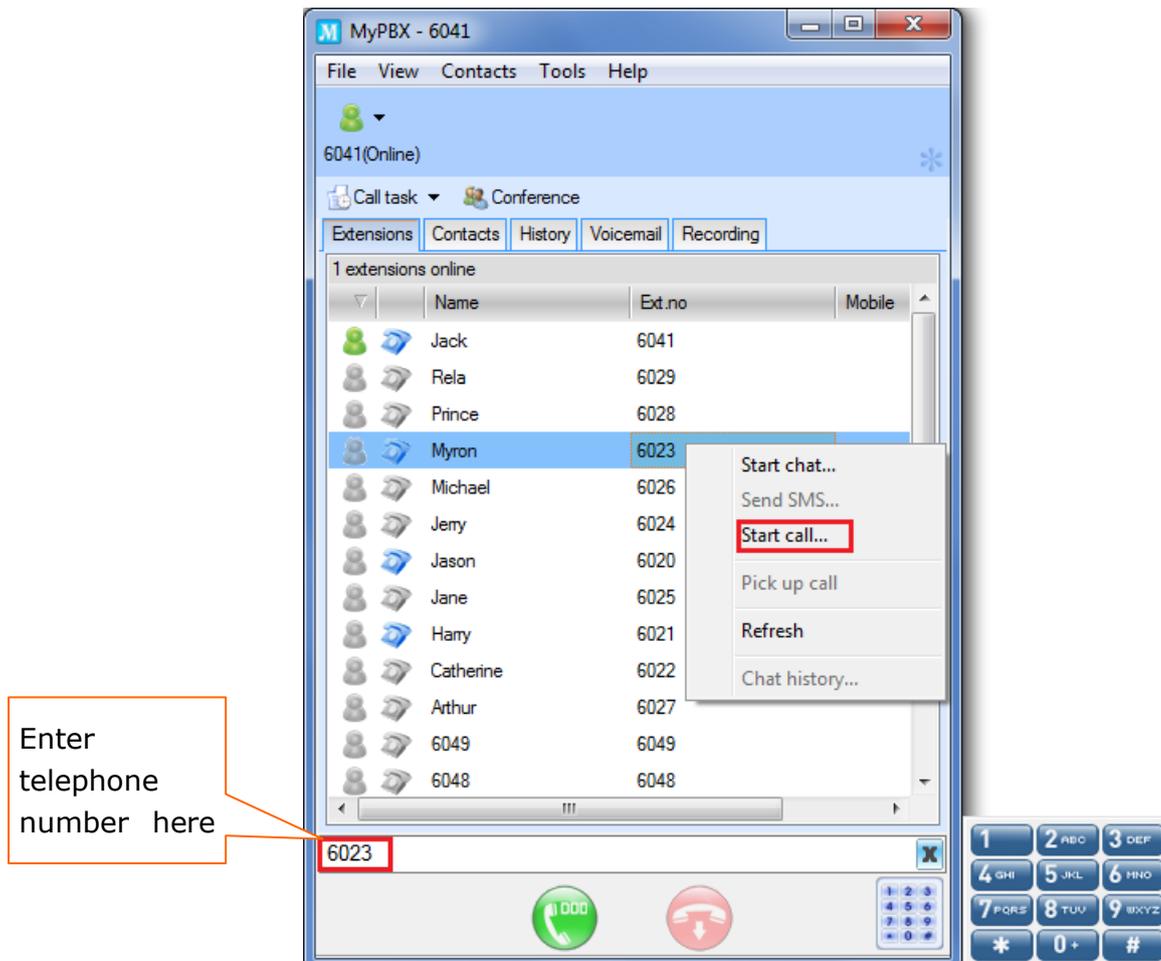
### 5.1 Dialing Call

Press a key to dial out easily on MyPBX Client that simple the dialing procedure and save time. Just move the mouse on the telephone and click it to dial out.

#### 5.1.1 Call Internal Extension Number

You can call an extension number through three ways:

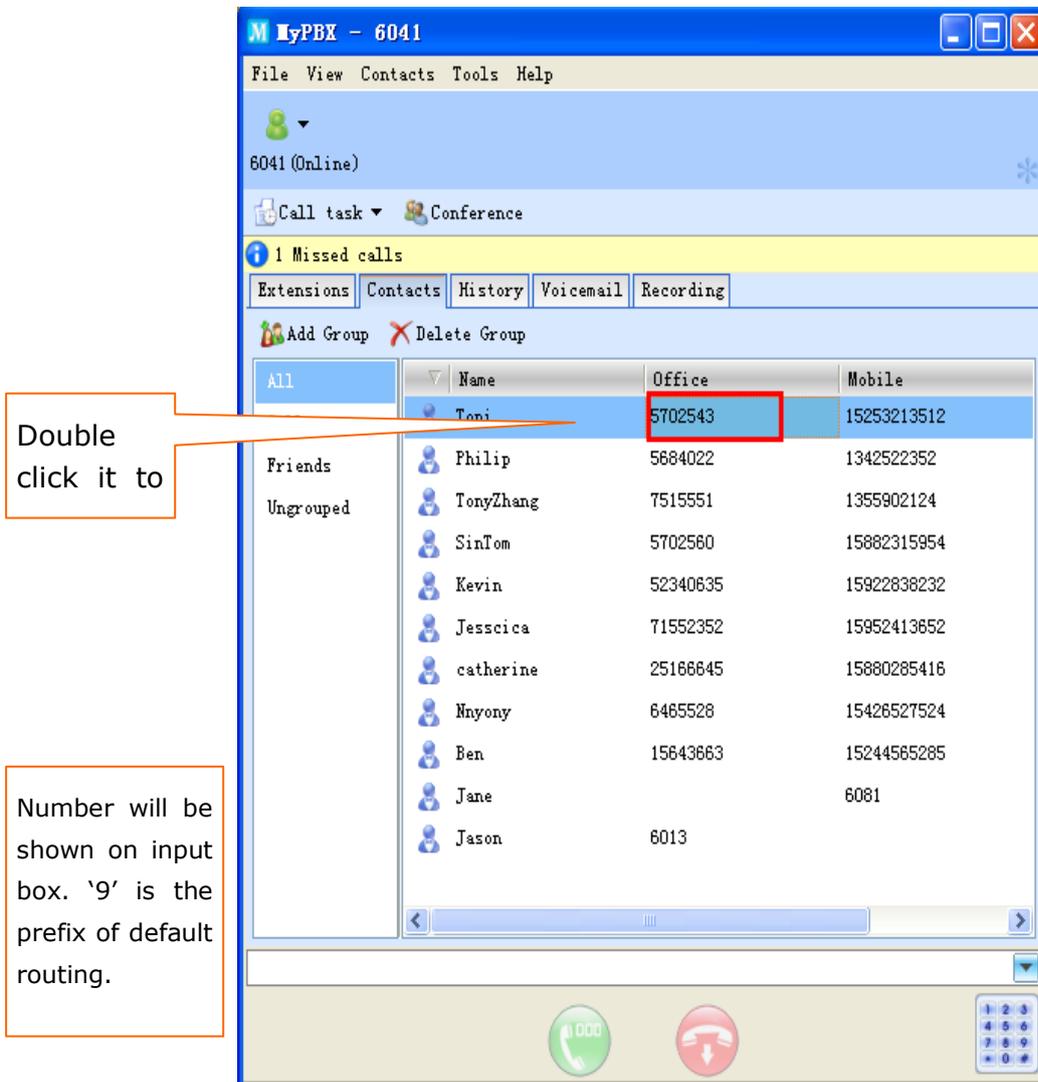
- (1) Double click the selected Ext. number to call out
- (2) Enter the Ext. number on the input box below and click "Call" button or "Enter" to call out
- (3) Click the Ext. number on the panel and then click "Call" or "Enter" to call out



(Figure 5-1)

### 5.1.2 Call External Line Number

(1) Call external line numbers on contacts list: You can double click on the selected number, and the system will call it with default routing. (If you don't want to use the default routing, just select the number and change the prefix on the input box below, system will save this new prefix and apply it to this number when you call it out next time).



(Figure 5-2)

(2) Call external line numbers that are not on contacts list: You can enter the number on the input box and add the prefix to it, such as "9" for PSTN line routing, "81" for SIP routing; you can enquiry Admin for other settings. System will auto call this number out from an idle trunk.

### 5.1.3 Call back a missed call

When you miss the incoming calls, just do as follows:

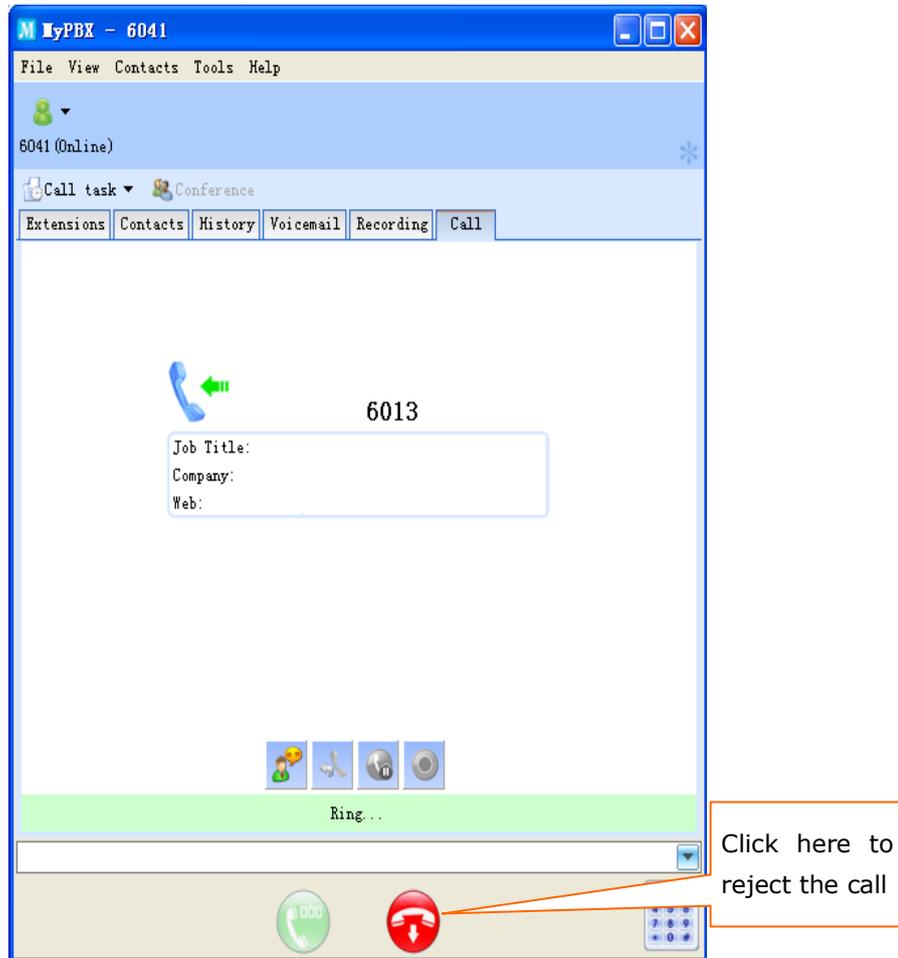
- (1) Double click the number on History list and call out by default routing.
- (2) Select the number on History list and add the prefix on input box to call out through

designated routing.

## 5.2 Incoming Calls

You can execute the following operations for an incoming call:

- reject it



(Figure 5-3)

## 5.3 Call Forward

Do you always encounter the following situations in office?

1. Answered a call only to find that you are not wanted on the phone but your colleague.
2. You are on a call, and there's another incoming call that you don't want to miss.
3. You are busy doing things and have no time to answer calls.
4. You have to go out, but don't want to miss any calls.

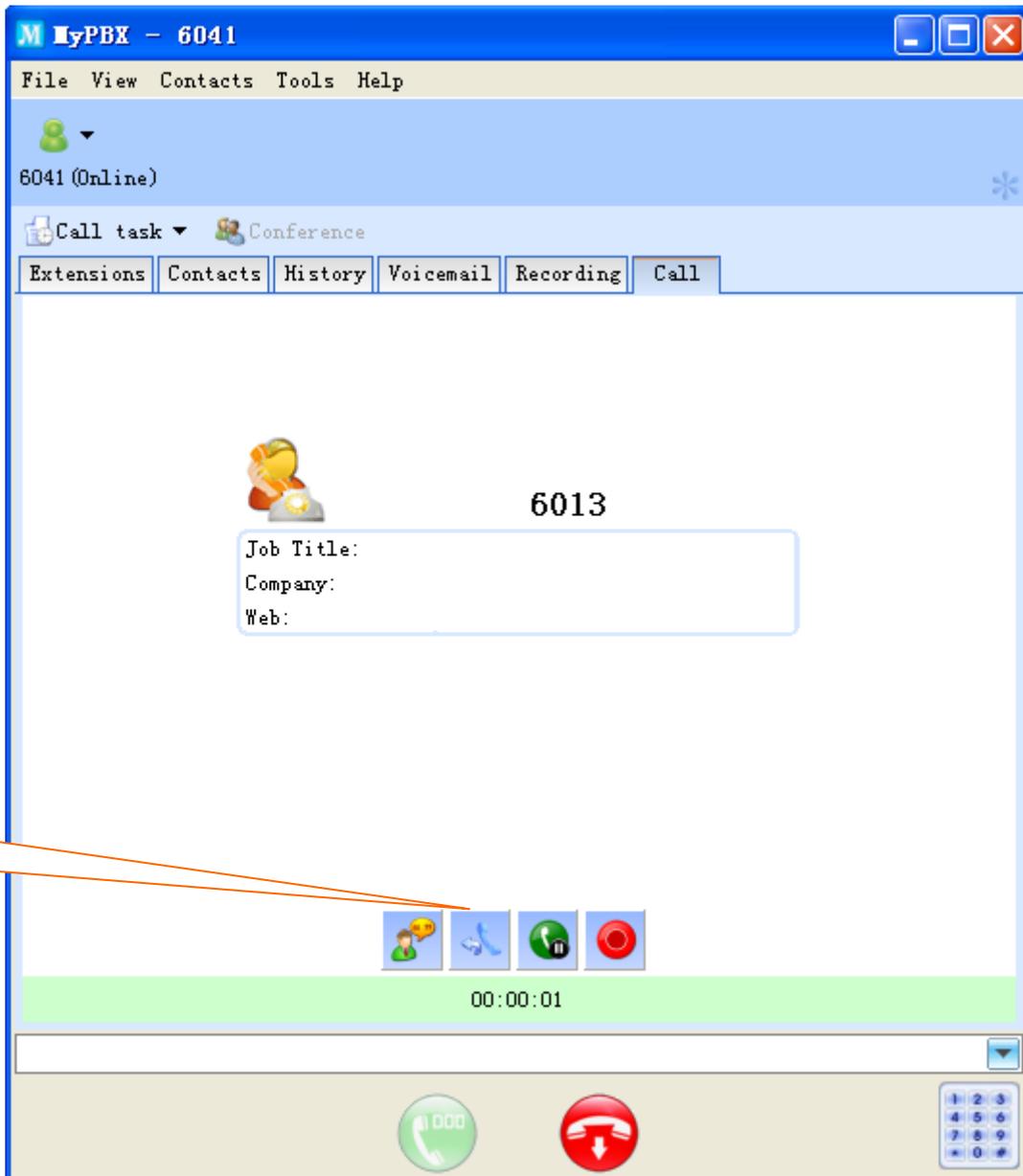
Don't worry. MyPBX Client will help you deal with these.

### 5.3.1 Forward before a call

When you go out or are too busy to answer a call, you can forward incoming calls to your mobile or other number. Please see details on [4.11 Call Forwarding](#).

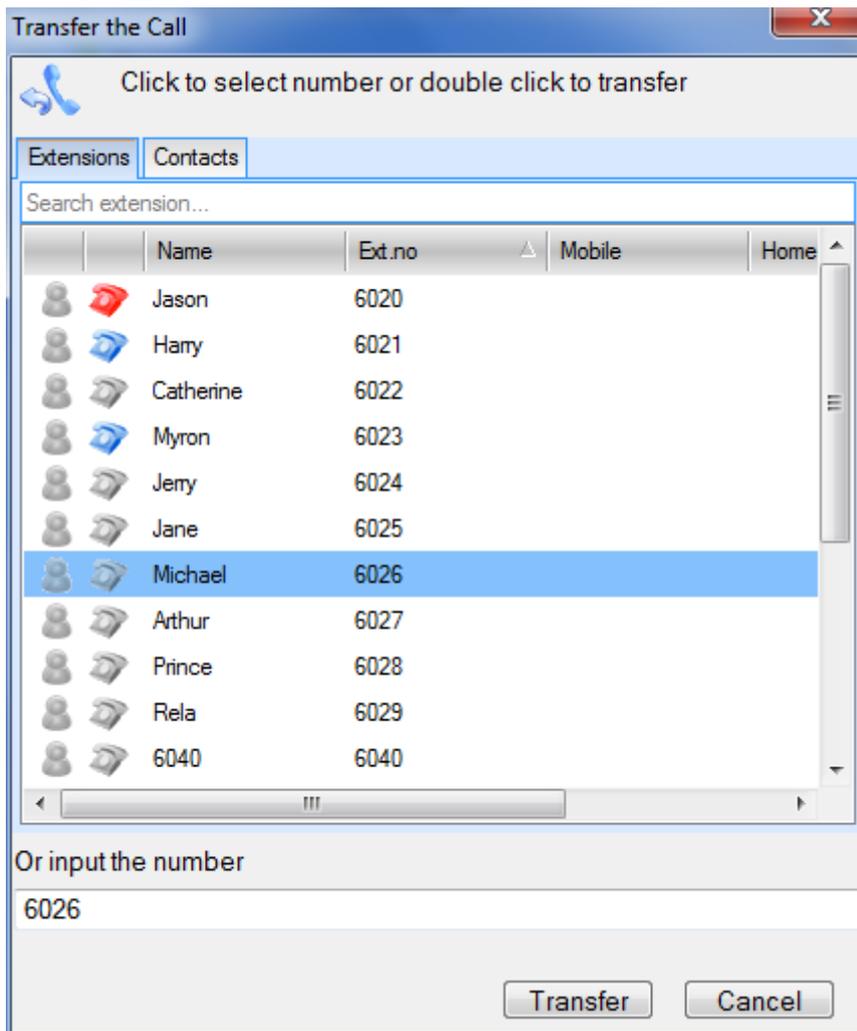
### 5.3.2 Transfer during a call

Step 1: Click the “Transfer call” button as Figure 5-4 shows



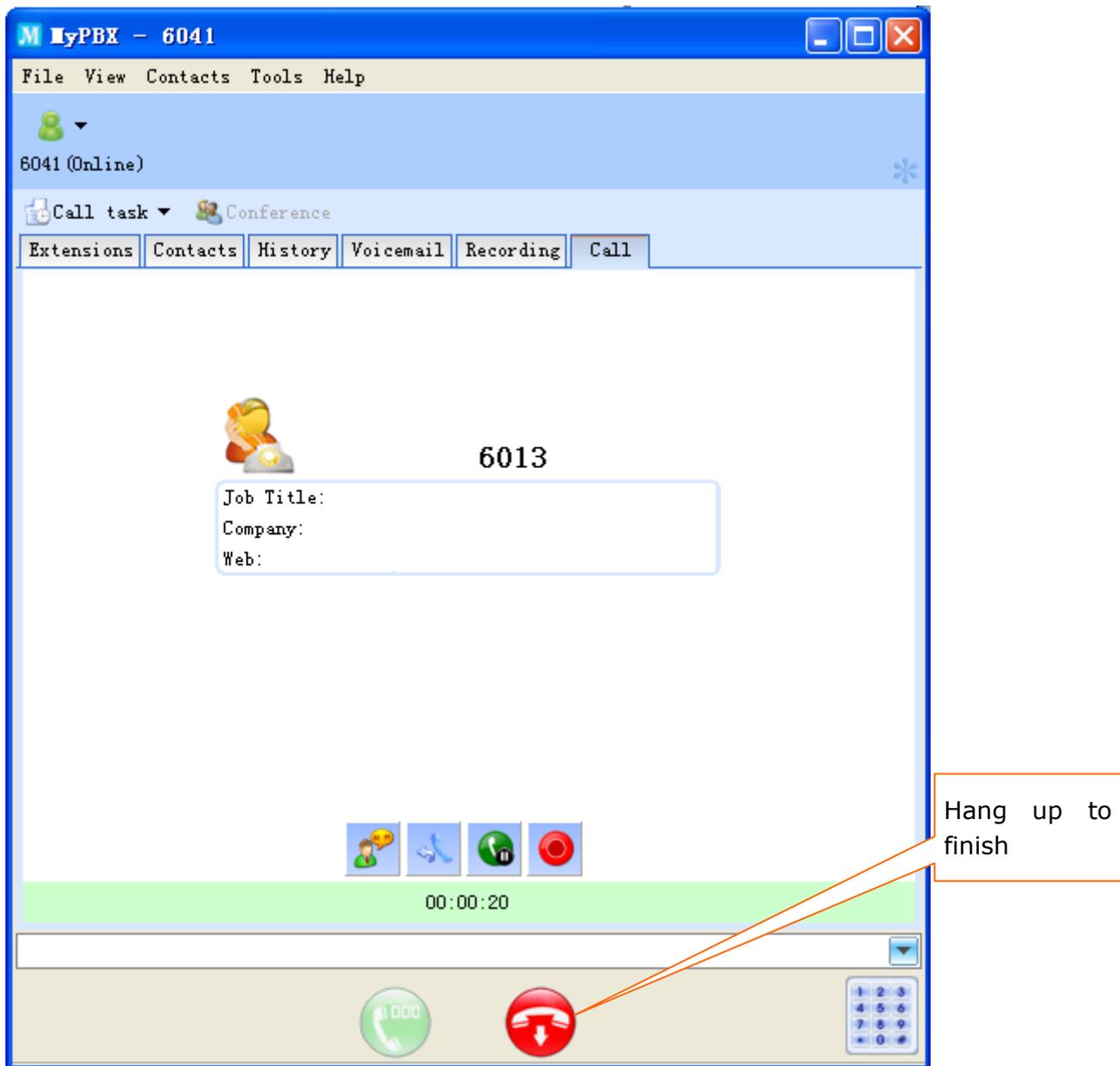
(Figure 5-4)

Step 2: Select the number that you want to forward to on the pop-up screen (Figure 5-5). Click to select a number, double click to forward call directly to this number. You can forward a call to an extension, a contact, a ring group/IVR, or a telephone number entered on the input box. (You need to add a prefix for forwarding to an external line number.)



(Figure 5-5)

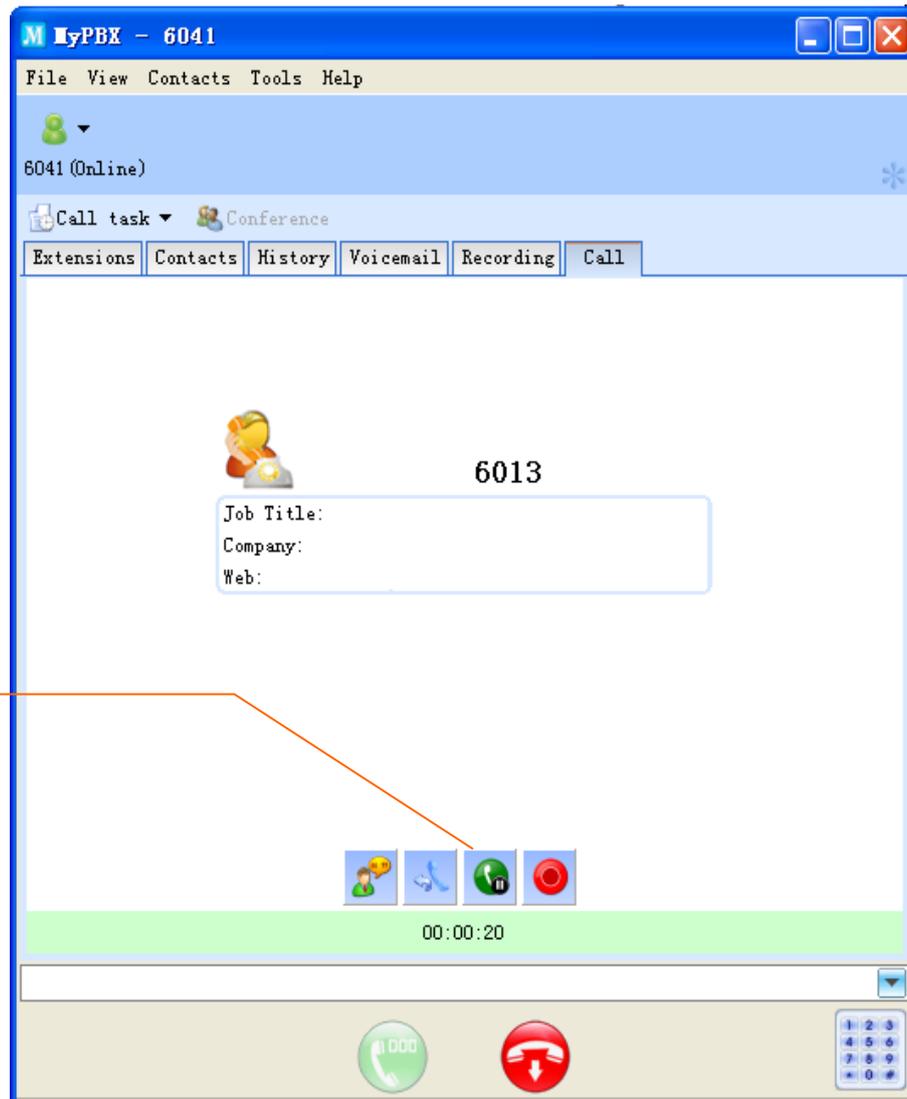
Step 3: Hang up the call to finish transferring or click “Flash” button to intercept a transferred call.



(Figure 5-6)

## 5.4 Call Parking

When you are on a call, you can park the current call on the Client instead of dialing feature code. In this case, you can click the "Call Parking" button and then MyPBX will give you a parking number. Dial this parking number on any extension to continue this call.



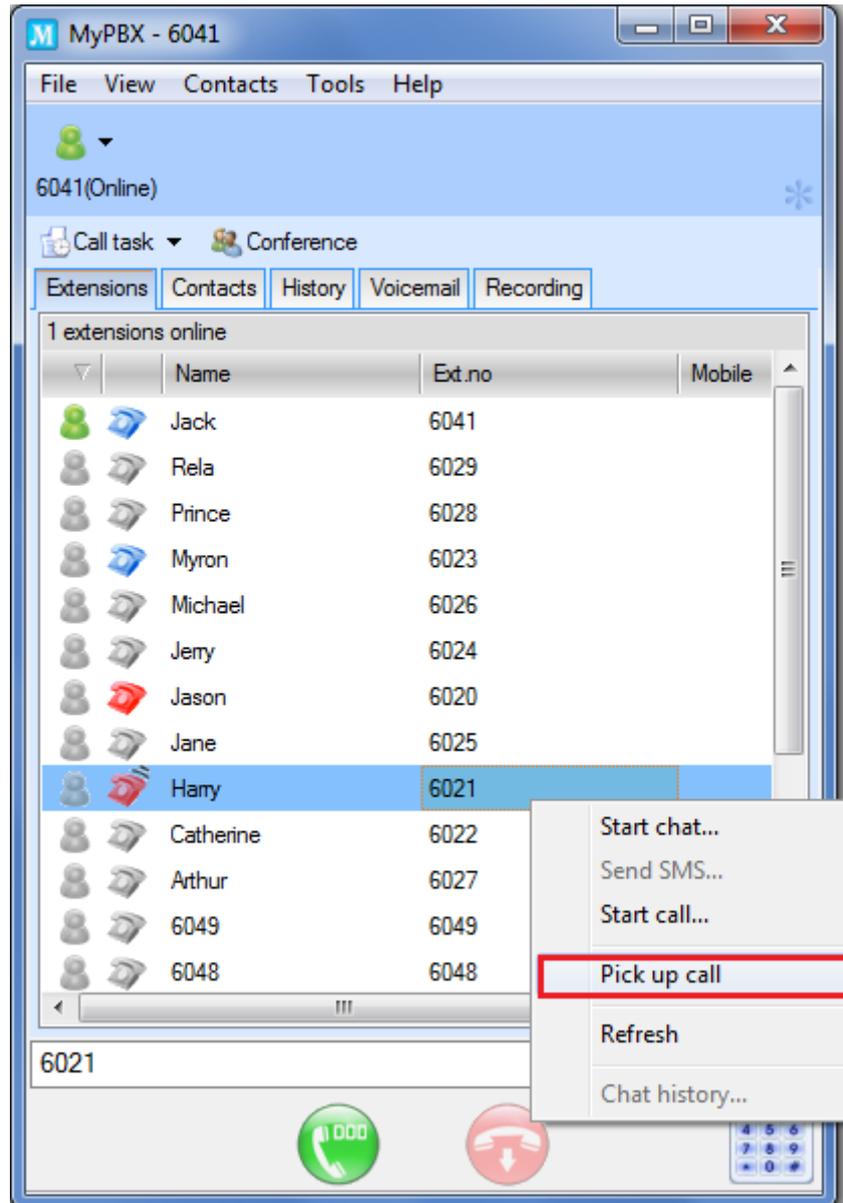
(Figure 5-7)

## 5.5 Pick up a Call

### 5.5.1 Pick up a call from appointed extension

When your colleague is absent, his phone keeps ringing, you can pick up this call through the following way:

On extension list, choose the ringing or on hold extension, right click and click "Pick up Call" on the pop-up screen as Figure 5-8 shows.

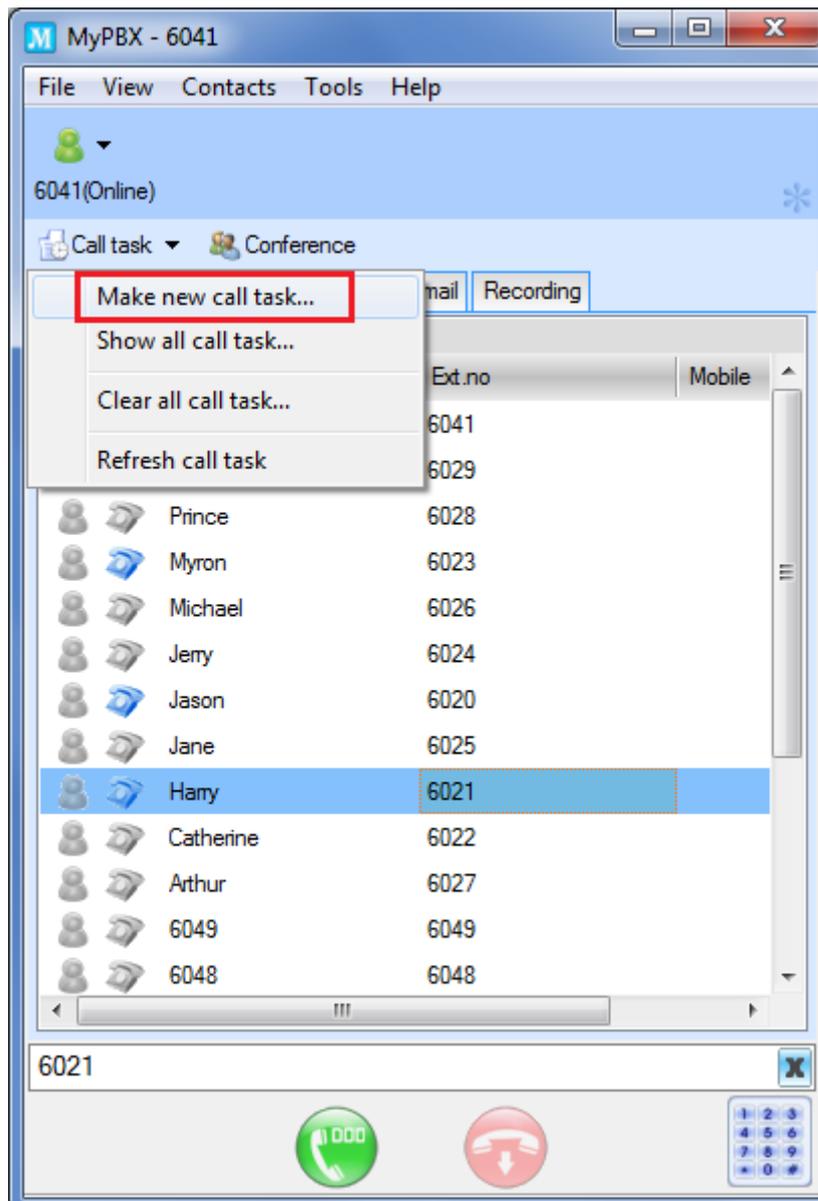


(Figure 5-8)

## 5.6 Call Task

Call Task can help you to call out a number on scheduled time or remind you to make a call to a preset number.

(1) You can conduct the corresponding operation through the drop-down screen as Figure 5-9 shows.



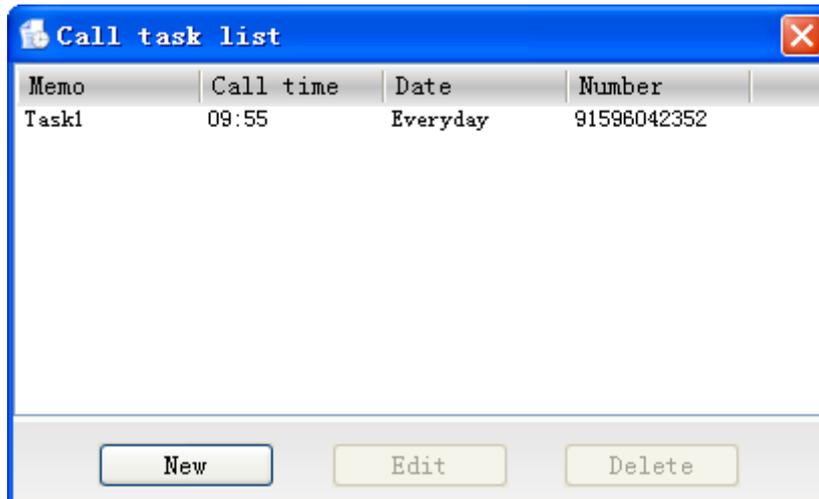
(Figure 5-9)

**Make new call task:** click here to pop-up a screen as Figure 5-11 shows

**Show all call tasks:** click here to open the task list as Figure 5-10 shows

**Clear all call task:** click here to delete all pre-arranged tasks

**Refresh call task:** click here to refresh the tasks list



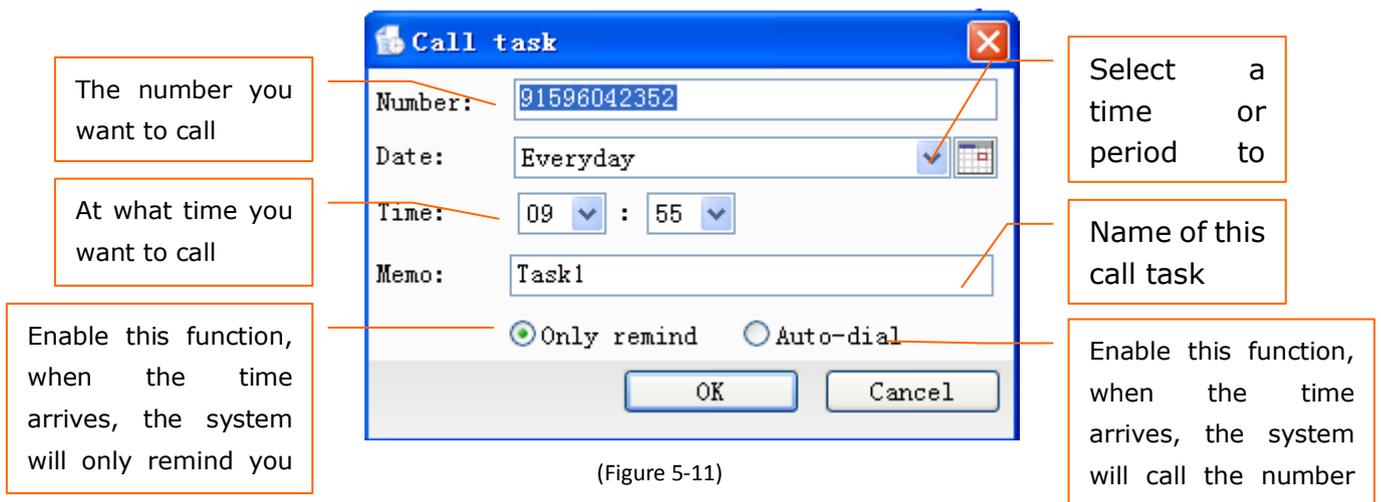
(Figure 5-10)

New: Click here to create a new task as Figure 5-13 shows

Edit: Click here to edit the chosen task item

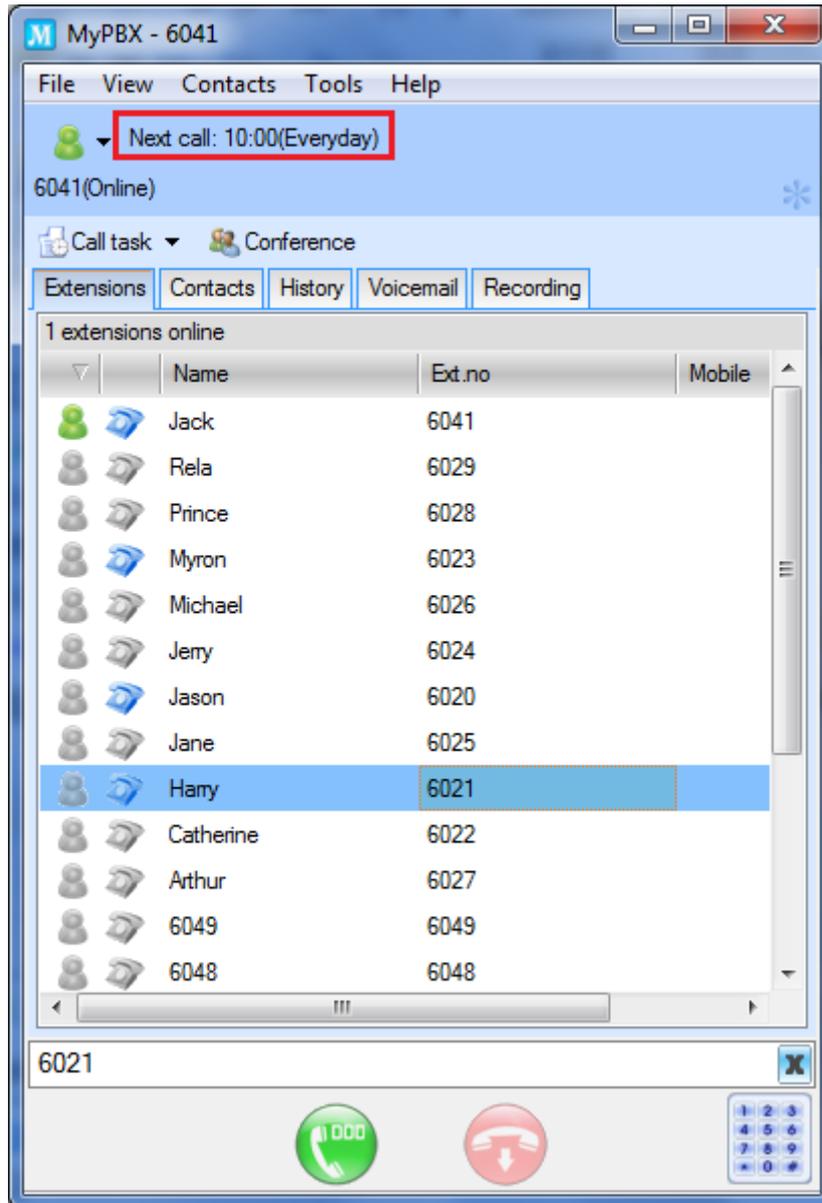
Delete: Click here to remove the selected task item

(2) Input the telephone number, call time, etc on window Figure 5-13.



(Figure 5-11)

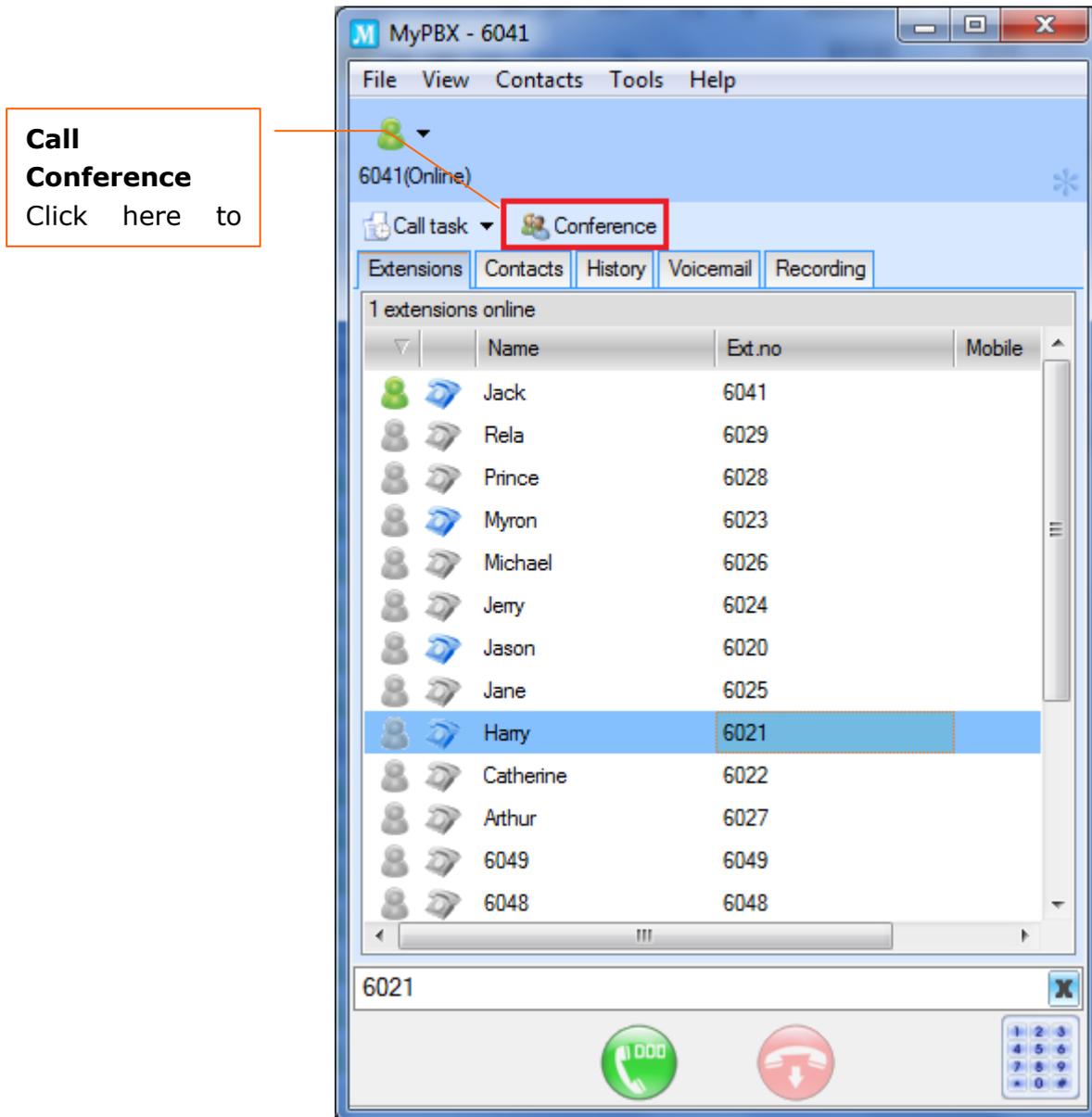
(3) Click "OK" to finish creating or editing task. You will see the latest task on MyPBX Client interface as Figure 5-12 shows.



(Figure 5-12)

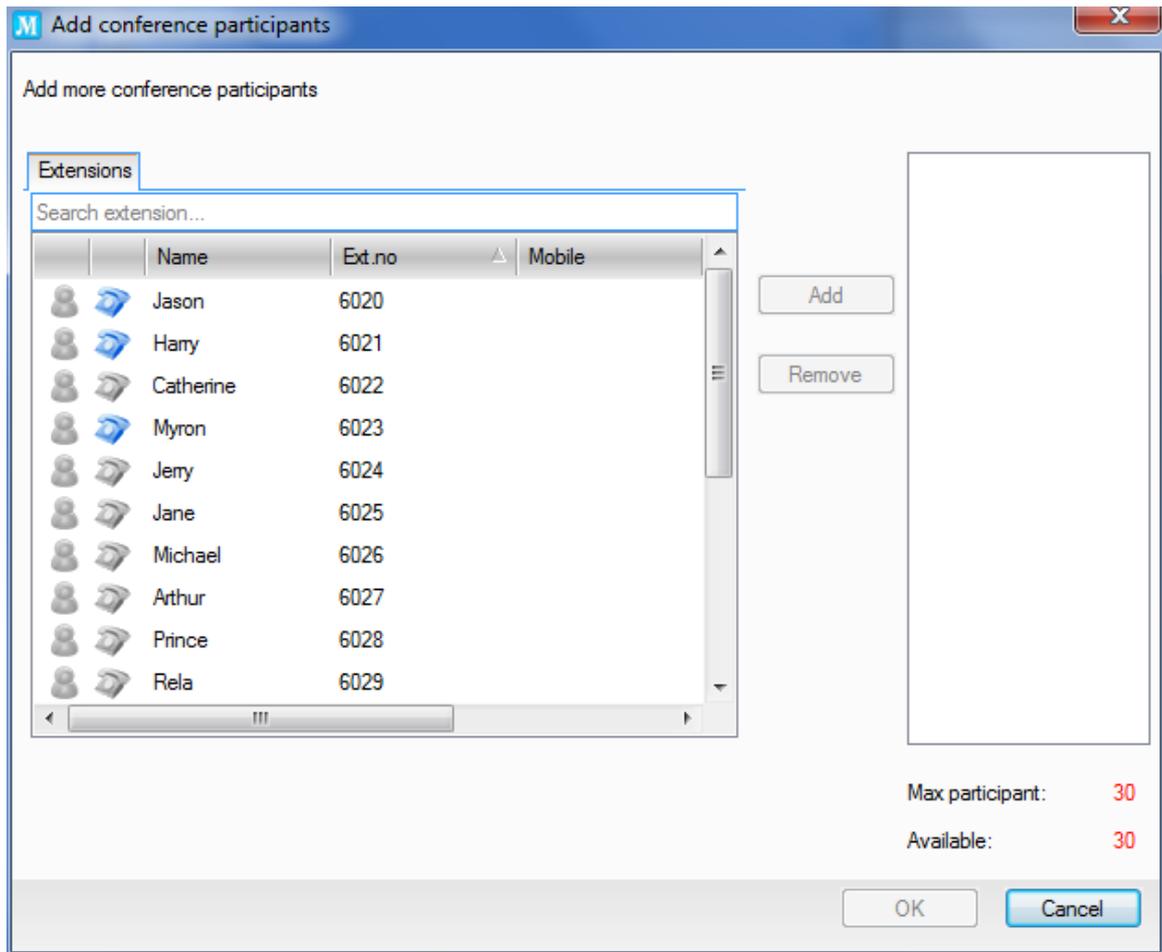
## 5.7 Call Conference

MyPBX provides the call conference for users. You can invite max.30 users to join the conference by MyPBX Client.



(Figure 5-13)

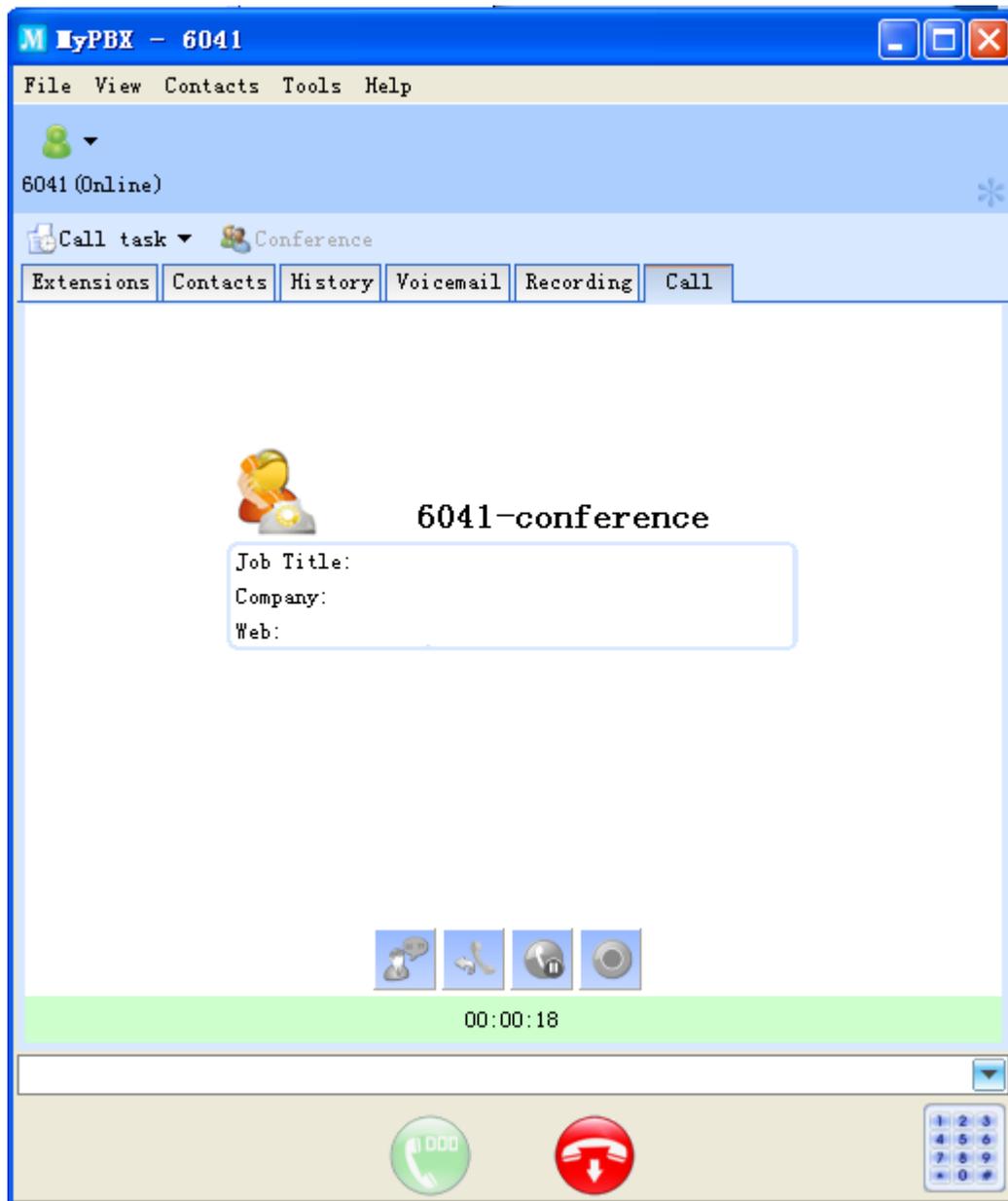
Step 1: Click “Call Conference” button to have the pop-up a screen as Figure 5-14 shows so as to invite people to join a conference.



(Figure 5-14)

Step 3: You are allowed to select people in the extension list to join this conference.

Step 4: Click "OK" to see the conference call interface as Figure 5-15 shows.

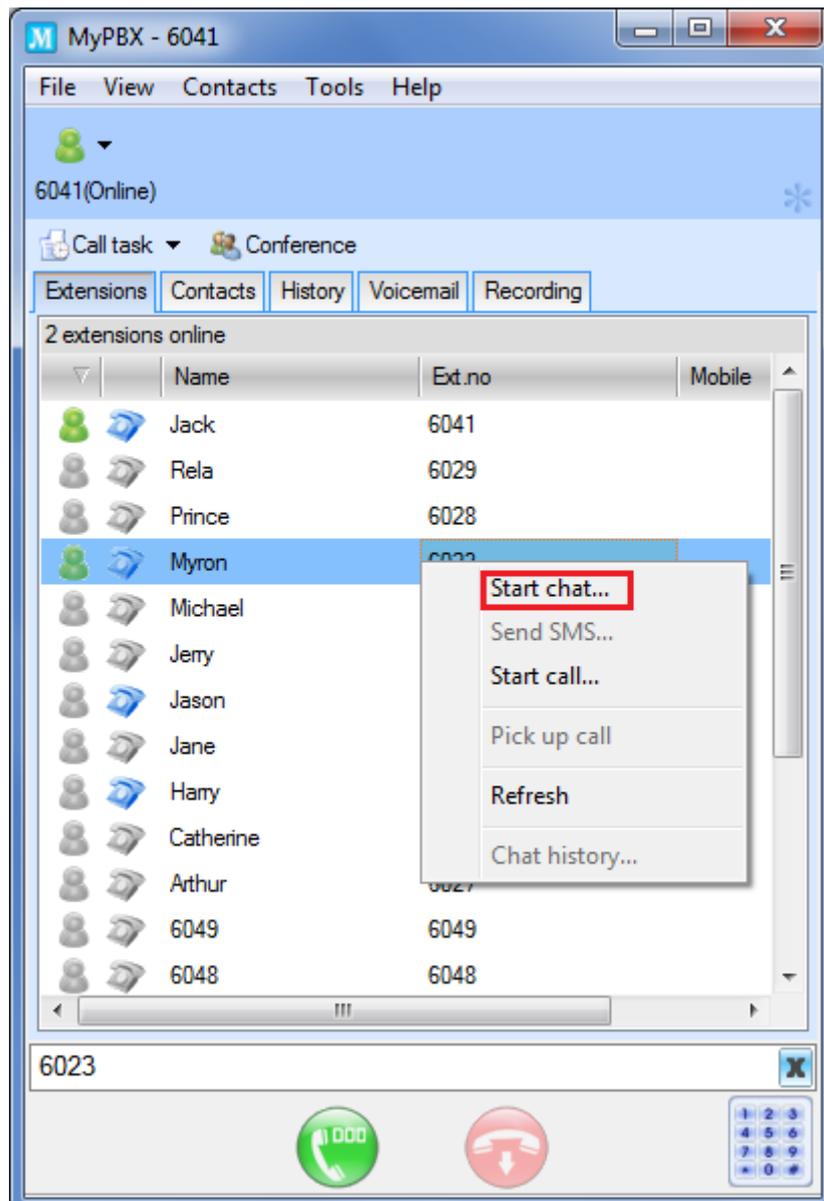


(Figure 5-15)

## 5.8 Internal Instant Message

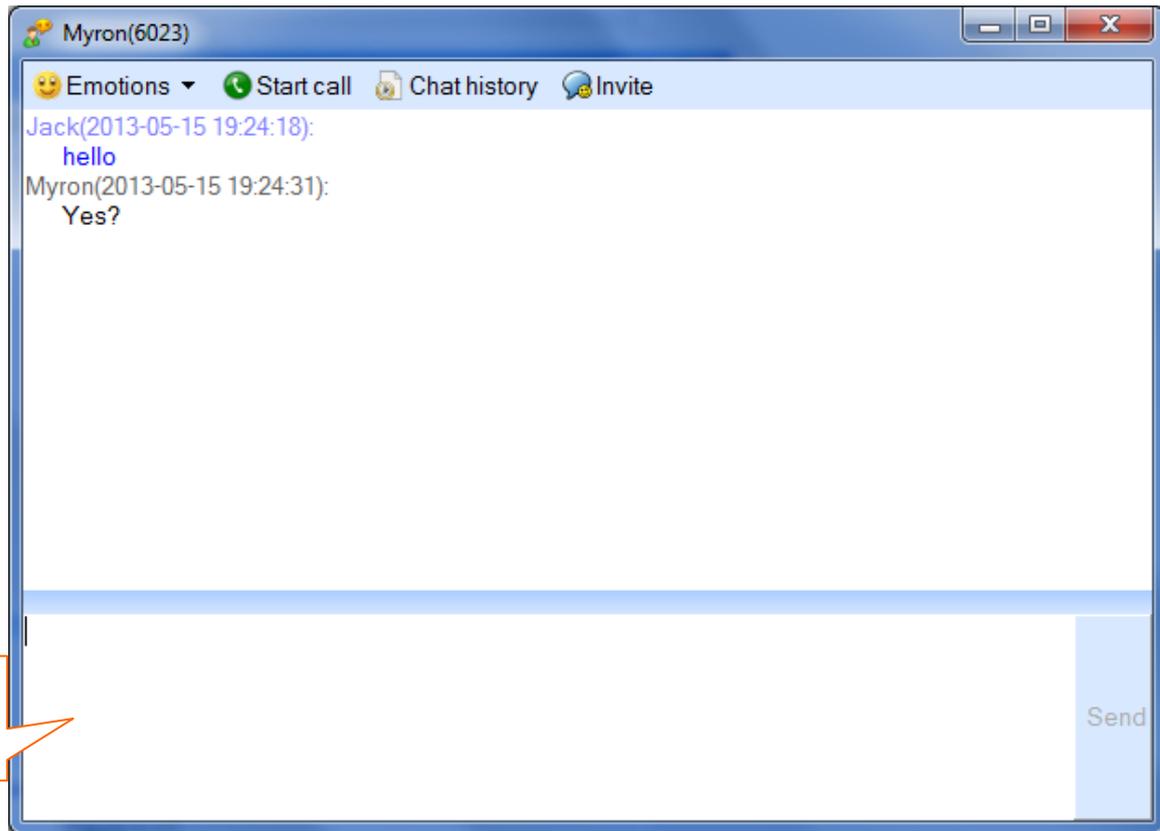
MyPBX Client provides the internal instant message feature for users to chat easily with members on the extensions list.

Step 1: On extensions list, select the member you want to chat with, right click to open the chat screen.



(Figure 5-16)

Step 2: Chat with selected extension user as Figure 5-17 shows.



(Figure 5-17)

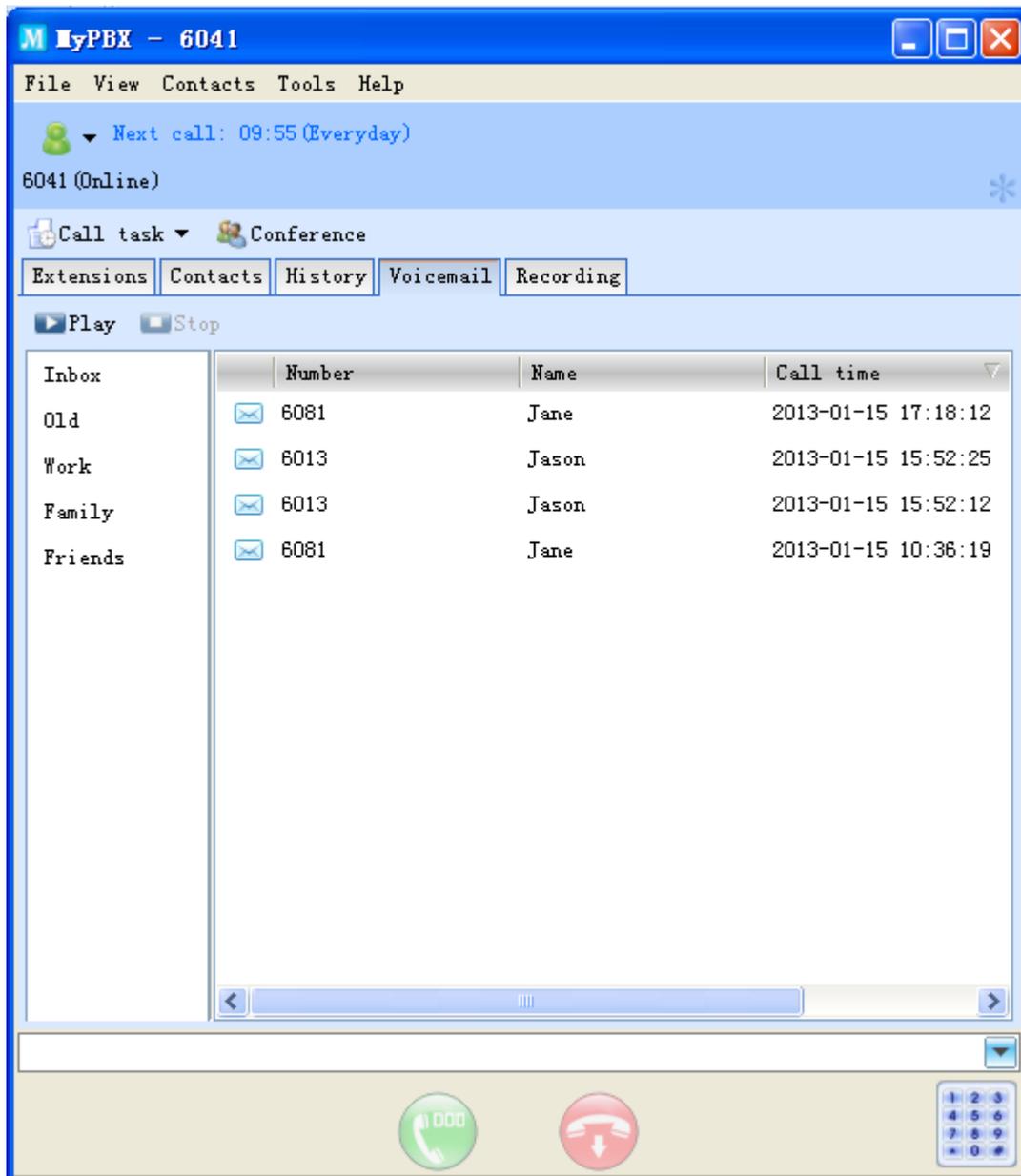
## 5.9 Voicemail

### 5.9.1 Leave a voicemail

Set "Forward to Voicemail": Please check [4.11 Call Forwarding](#)

### 5.9.2 Play a voicemail

When someone leaves a voice message on your voicemail, you can listen to the message directly. Please check [4.4 Voicemail Management](#).



(Figure 5-18)

Step 1: Select a voicemail and click “Play” button or double click the selected item to listen to it.

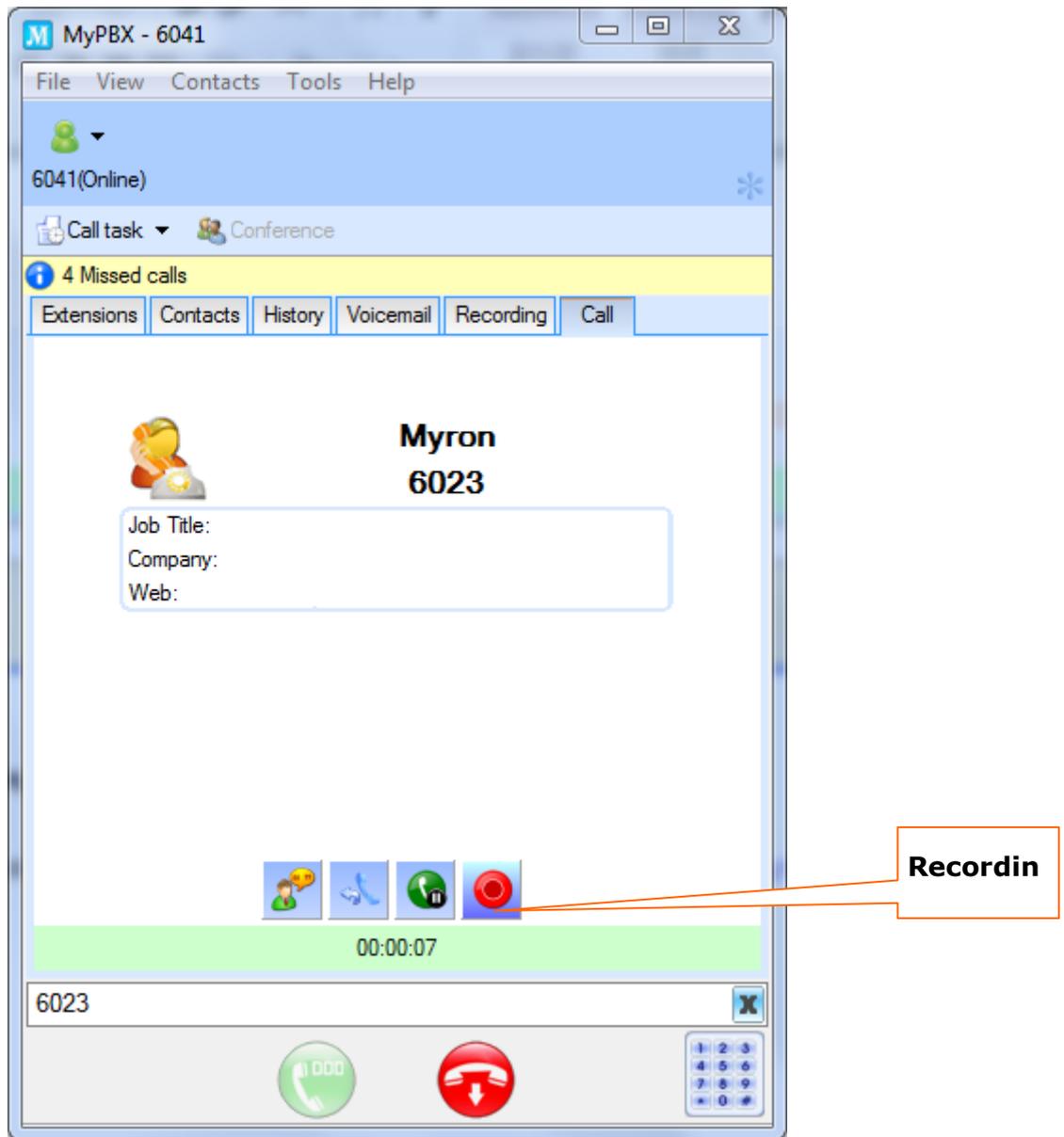
Step 2: You can click “Stop” button or hang up the phone to stop the play.

## 5.10 Recording

### 5.10.1 Record Conversation

MyPBX Client provides recording function for users to record conversation.

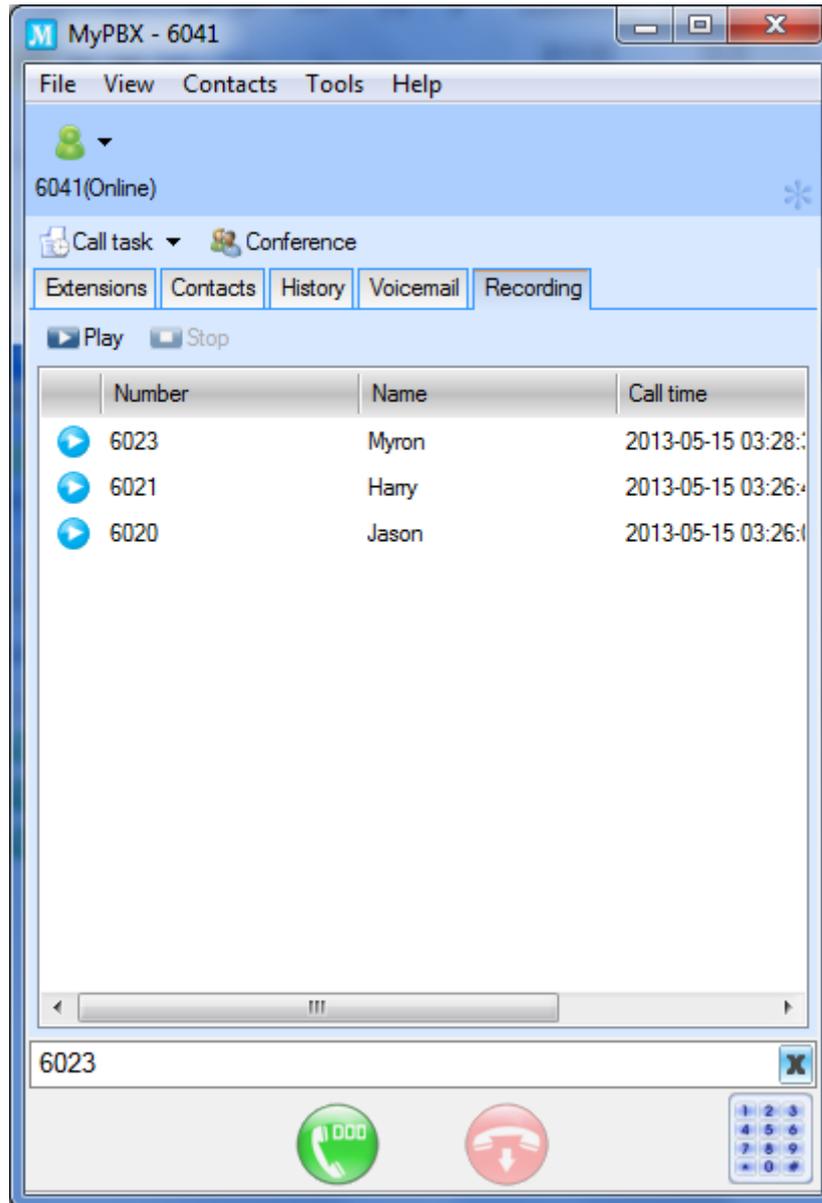
During a call, you can click “Recording” button as Figure 5-19 shows; the system will start the recording this conversation. Click “Stop” button when over; the system will auto finish the recording when you hang up the call.



(Figure 5-19)

### 5.10.2 Play Recording

All recordings will be stored on "Recording" listing, please refer to [4.5 Recording Management](#).

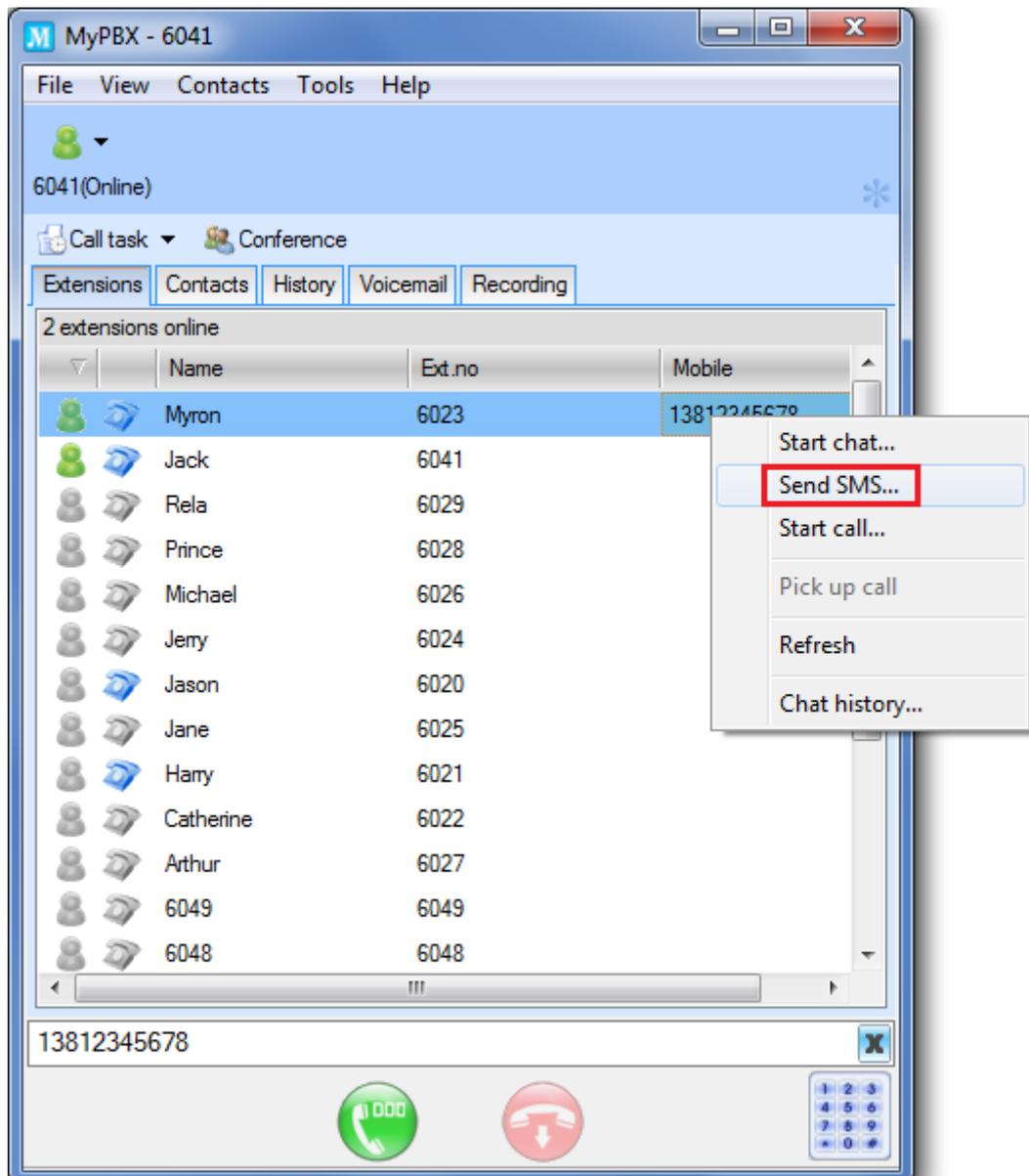


(Figure 5-20)

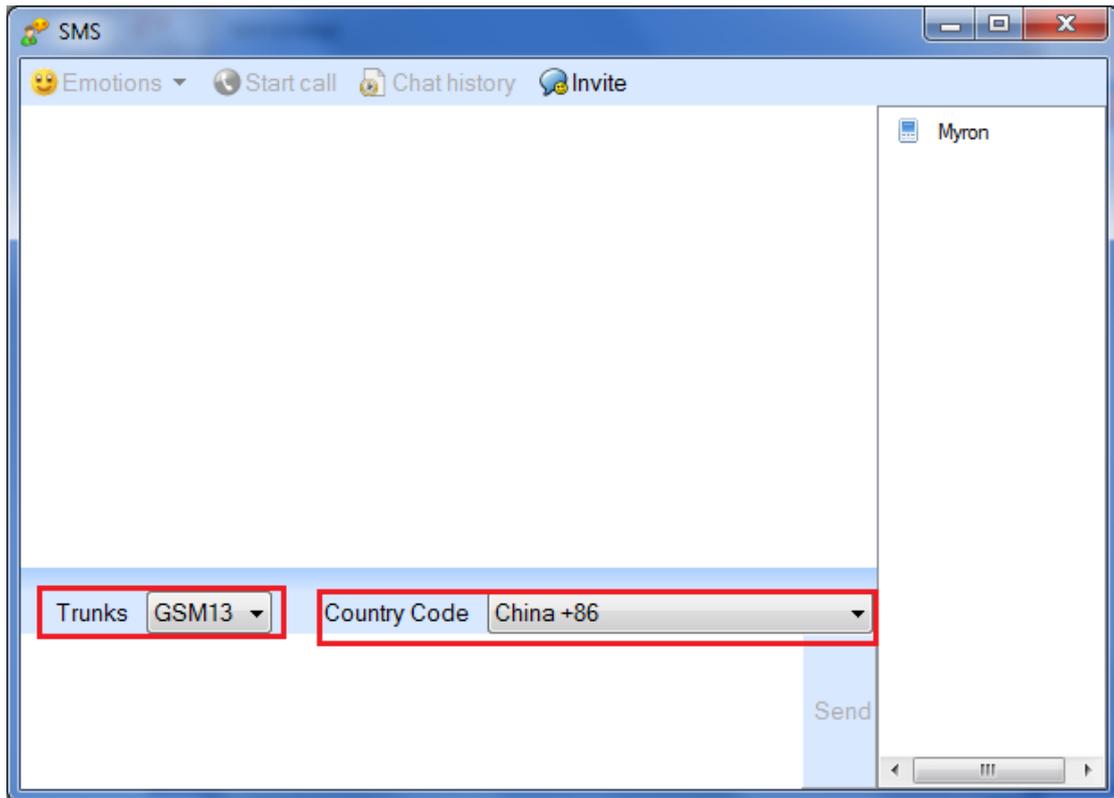
- (1) Select the item that you want to play, click “Play” button or double click on selected item.
- (2) You can click “Stop” button or hang up the phone to stop the play.

## 5.11 SMS

Right click the mouse and click “Send SMS” as Figure 5-21 shows, it will pop-up a window for sending text as Figure 5-22 shows.



(Figure 5-21)



(Figure 5-22)

**Note:** Before sending a SMS, please confirm that the correct configuration of SMS setting is made on MyPBX to make Email to SMS work. Choose one GSM trunk and the corresponding country code on the SMS window first, and send the SMS.

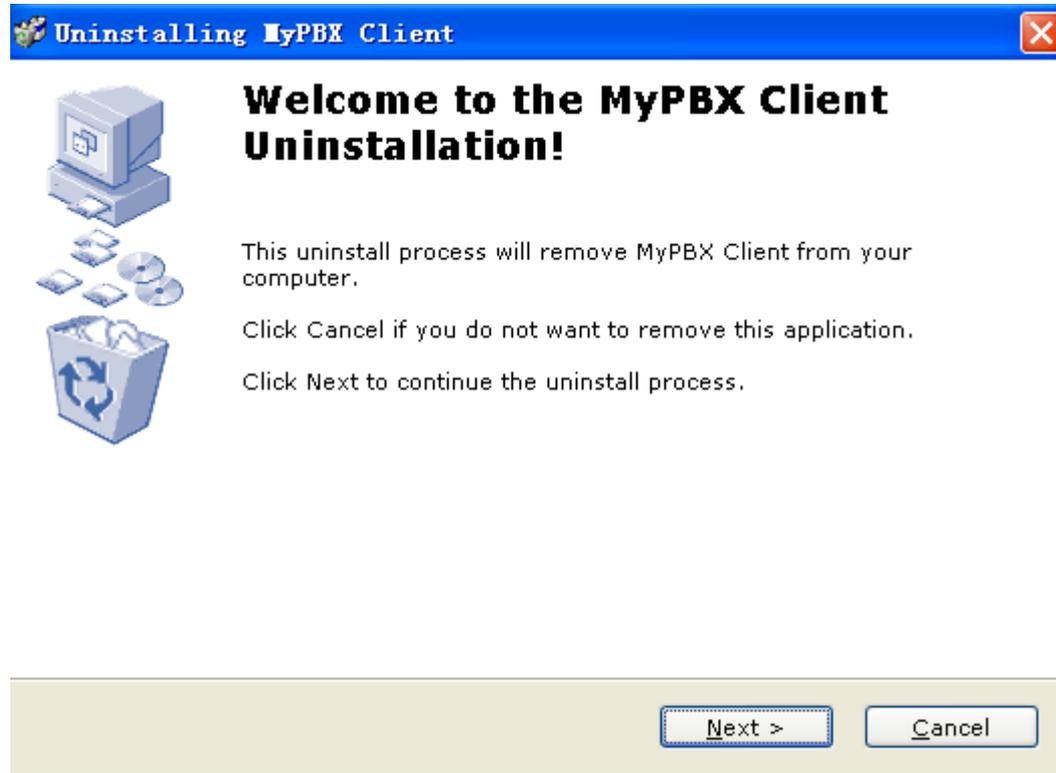
## 6 Uninstall MyPBX Client

Uninstalling MyPBX Client will delete all your data, including contacts number, call log and recorded voicemail on this PC. Before you uninstall MyPBX Client, make sure you have backed up

the data you need.

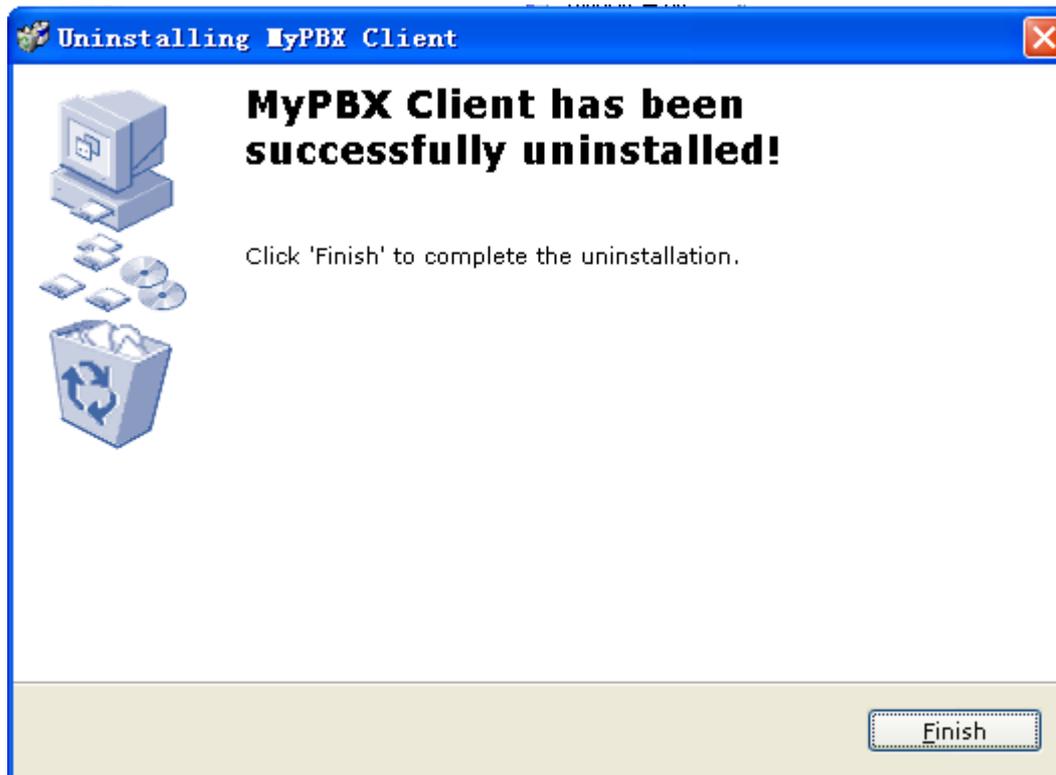
**Method 1:**

1. Go to the Window's Start menu and open MyPBX Client Uninstall
2. The next prompt screen will guide you to close the current running program first. Choose "Next" to continue the uninstallation program.



(Figure 6-1)

3. The Uninstallation progress will delete the MyPBX Client files from your computer. When the uninstallation is complete, the Uninstall Finished screen will pop up. Click Finish button.



(Figure 6-2)

**Method 2:**

1. Go to the Windows Start menu and open the **Control Panel**.
2. Go to the Add or Remove Programs, which will open a new screen with a list of software programs installed on the computer. Scroll down to MyPBX Client and click **Change/Remove** button.

[Finish]