

PBNEXT

Call Log

Joe Somebody	Connected
Joe Somebody	Ringing
Joe Somebody	On Hold



Software User Manual

Connected Call - 08:25

Joe Somebody
From: (949) 555-1234
Routing: Customer support

Buttons: Disconnect, Transfer..., Hold

Call Log

Name	From / (To)	Routing	Status
New Customer	(949) 552-1212	(Direct)	Hold 2 minutes
Tin Panther	(949) 555-1234	Customer Sup...	Ringing

Buttons: Instant Dial...

Connected to server

Software User Manual

VERSION 1.6
Windows 9x, Me/2000/XP/2003

PBNEXT

For installation instructions, see your Installation Guide. For help, visit our website at www.pbnxt.com or call 1-877-7-PBNEXT.

Getting Started

Thank you for choosing *PBNext*, the #1 choice for small business communications! *PBNext* is a complete phone system that allows you to:

- Promote a more professional atmosphere and company image
- Improve your sales process
- Enhance office productivity
- Manage multiple incoming calls from your PC
- Access your service from anywhere
- Save money

SYSTEM REQUIREMENTS FOR THE SOFTWARE

PBNext supports any computer that meets the following requirements:


- Microsoft Windows 98, Windows Millennium Edition (Windows Me), Windows 2000, Windows XP
- The latest Windows service packs and critical updates applicable to your operating system available from Microsoft
- Intel Pentium class processor (90 MHz or faster recommended)
- 32 megabytes of RAM (64 megabytes or higher recommended)
- 10-100 megabytes free on hard disk space, depending on your system's configuration (an additional 100 megabytes may be required during the installation process)
- Video card and monitor that support 800x600 resolution, 256 colors at 96 DPI
- An available phone line
- Internet Access (High speed or dial-up internet access.)

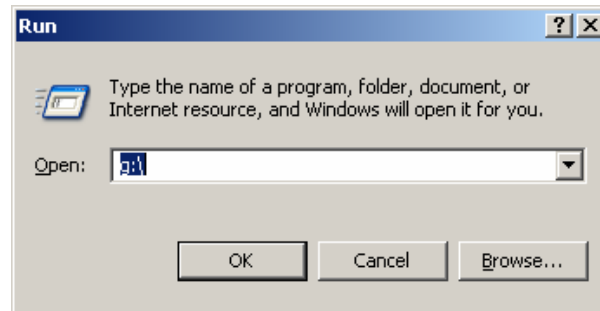
NOTE: If a customer has dial-up internet access and only one phone line, *PBNext* will work, but only for incoming call routing otherwise known as "forwarding." Customer service can help setup this for you, or see "Call Forwarding" in the mypbnext.com manual.

INSTALLING YOUR *PBNext* SOFTWARE

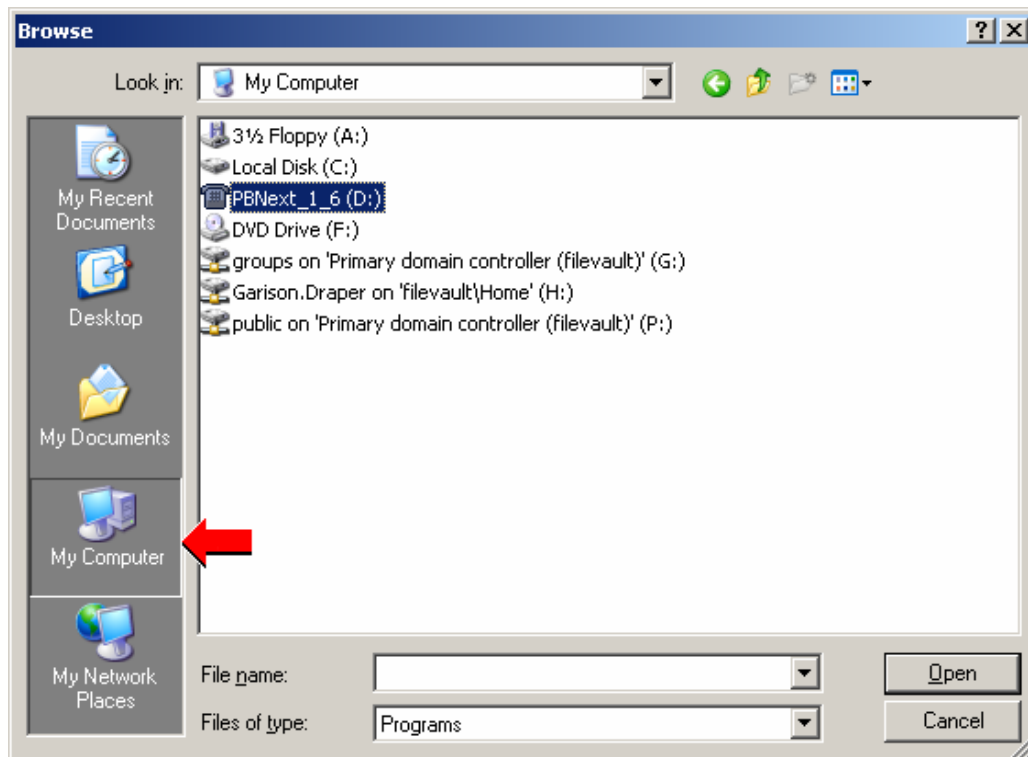
Close all running programs.


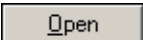
Insert the *PBNext* CD into your computer's CD-ROM or DVD drive. The *PBNext* installer should start automatically. If it does not start automatically continue on below, otherwise proceed onto the next section titled "Starting *PBNext*."

- On the Windows taskbar, click  then click **Run** on the Start menu. The **Run** pop-up window will appear:





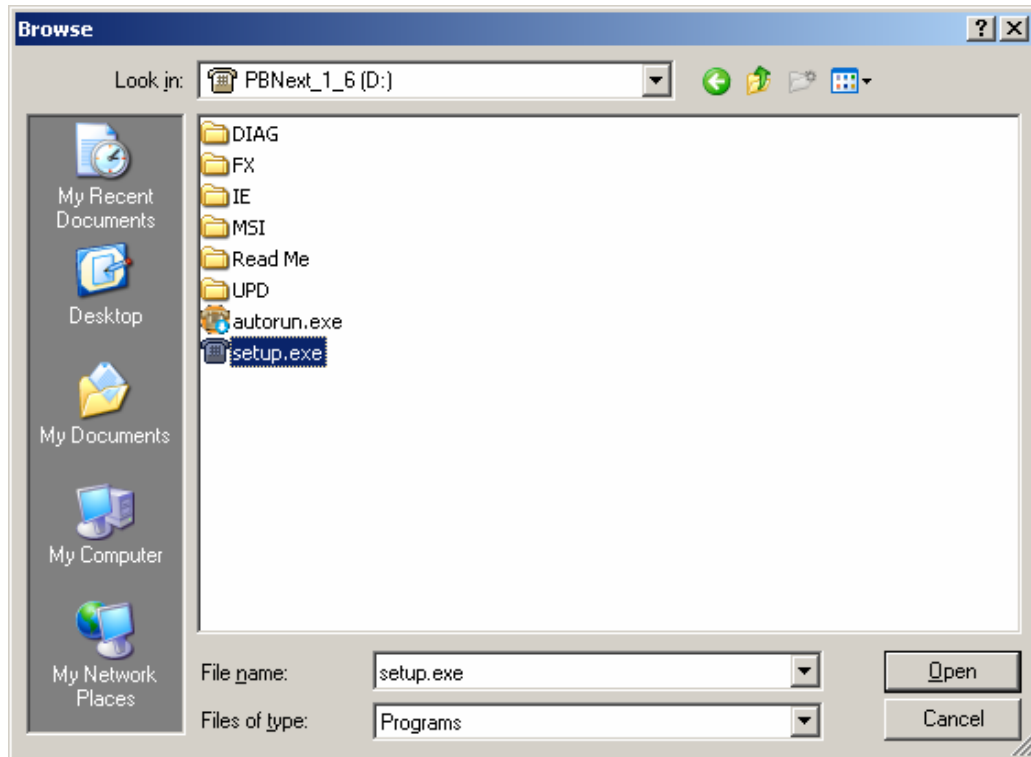
- Click on the  button. The **Browse** menu will appear:




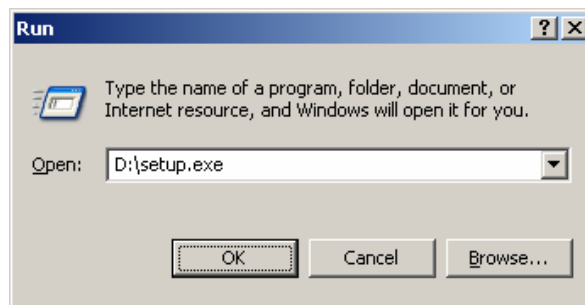
- Click on the **My Computer** icon then select the drive labeled  ***PBNext_1_6***.
- Click on the  button.

INSTALLING YOUR *PBNext* SOFTWARE (CONTINUED)

- Select the file  **setup.exe** then click on the  button.





- Back at the **Run** pop-up window, setup.exe will appear in the Open box. Click the  button.



Follow the on-screen instructions to complete the *PBNext* software installation on your computer. The installer will automatically update your computer's other software if necessary (this may take several minutes and may reboot your computer up to two times depending on your operating system).

STARTING *PBNext*

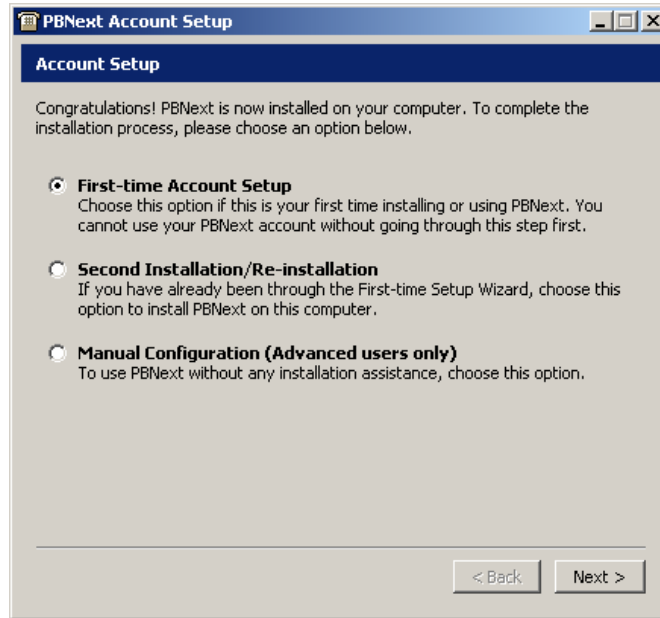



When installation is complete, you will see *PBNext* icons on your desktop  and in your Start menu . Log onto the internet, and then double-click the icon on your desktop to start *PBNext* manually. After your initial login, *PBNext* will automatically start each time you logon to your computer.

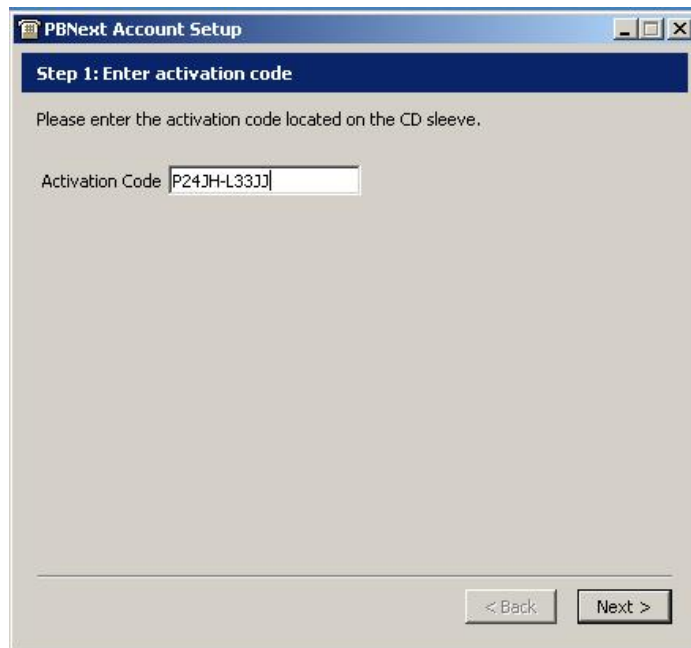
SETTING UP YOUR *PBNext* ACCOUNT




The *PBNext* Account Setup Wizard will take you through the process of preparing your *PBNext* account. You will only need to fill in this information once. Set up your account as follows:

- After you logon the first time, the **Account Setup** window will appear, please read and select the appropriate choice then click the  button to continue.




- For First-time Account Setup locate your activation code (it will be on the CD sleeve, your order form, or your welcome letter). At the **Enter activation code** screen, type your activation or registration code into the box and click the  button to continue. If you can't locate your activation code please contact Customer Support at 1-877-7-PBNext.
- If this is your Second Installation or Re-installation you will need your account ID, username and password information, not your original activation code
- For Manual Configuration, please contact Customer Support at 1-877-7-PBNext.



- At the **About to Begin** and **Account Overview** windows, read the information and click on the  buttons to continue.
- At the **Terms of Service** window, read through the terms of service and select the box indicating you understand the terms of agreement. Click on the  button to continue.
- At the **Account Information** screen, copy your account ID, Username, and Password. Be sure you write down this information and save a copy. Click on the  button to continue.



- In the **Startup Preferences** window, type in the phone number of the phone you wish to receive your calls (include the area code), typically the nearest phone to the computer you are going to run *PBNNext* on. You may also make a selection to have *PBNNext* start automatically when you start your computer. Click on the  button to continue.



- Your setup is now complete. Click the **Finish** button when you're ready to enjoy all the features of *PBNext*!

LOGGING IN TO *PBNEXT*

To login to *PBNext*, type the following information (found inside your Welcome Kit) into the boxes on the login screen:

- Account ID
- Username
- Password

The screenshot shows a window titled "PBNEXT Login". The window has a blue header with the "PBNEXT" logo. Below the header is a "Login" section with four input fields: "Account ID" (55555), "Username" (admin), "Password" (*****), and "Local Phone Number" ((949) 000 0000). Each of the last three fields has a "Remember" checkbox checked. Below the input fields are three buttons: "Quit", "Options <<", and "Login". At the bottom, there is a "Status" section displaying "Disconnected" and a checkbox for "Automatically log in next time" which is checked.

The first time you log in, click on the **>> Options** button and type in the phone number (including the area code) of the phone nearest the computer you are going to run *PBNext* on. If you need to change this number in the future, you may click on the Options button when you login and type in the new number.

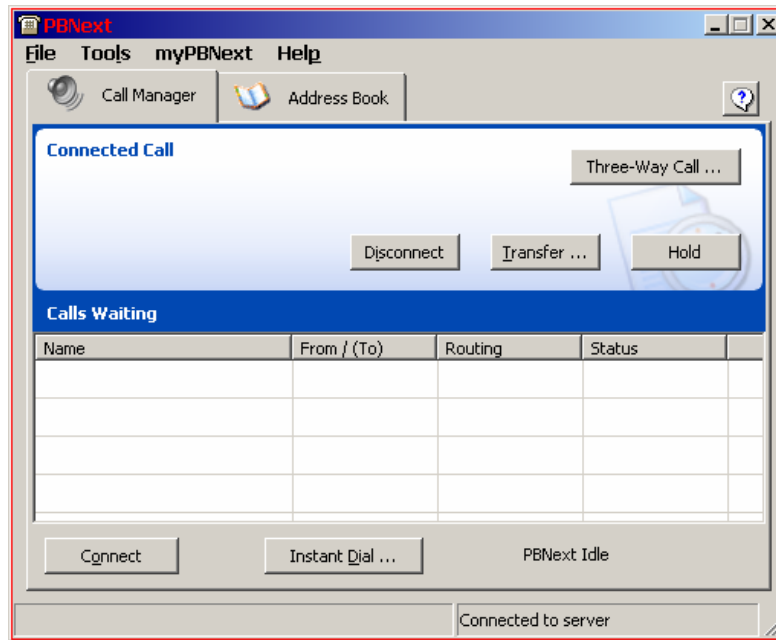
You may also make a selection to have *PBNext* start automatically when you start your computer.

Once you have completed this step and after logging onto the internet, click the **Login** button to proceed.

Using *PBNext*

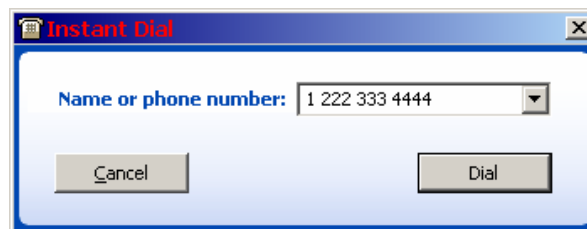
CALL MANAGER


The *PBNext* main screen is the Call Manager. This is the screen that appears when you click on the *PBNext* icon on your desktop or in the lower-right corner of your screen. All *PBNext* features are easily accessible from the Call Manager. You can make and receive phone calls, manage and connect waiting calls, place calls on hold, transfer calls, and start a conference or three-way call.



MAKING CALLS

To make a phone call, click the **Instant Dial ...** button in your call manager or select **Tools** from the Call Manager menu then select **Instant Dial**. The **Instant Dial** pop-up window will appear:

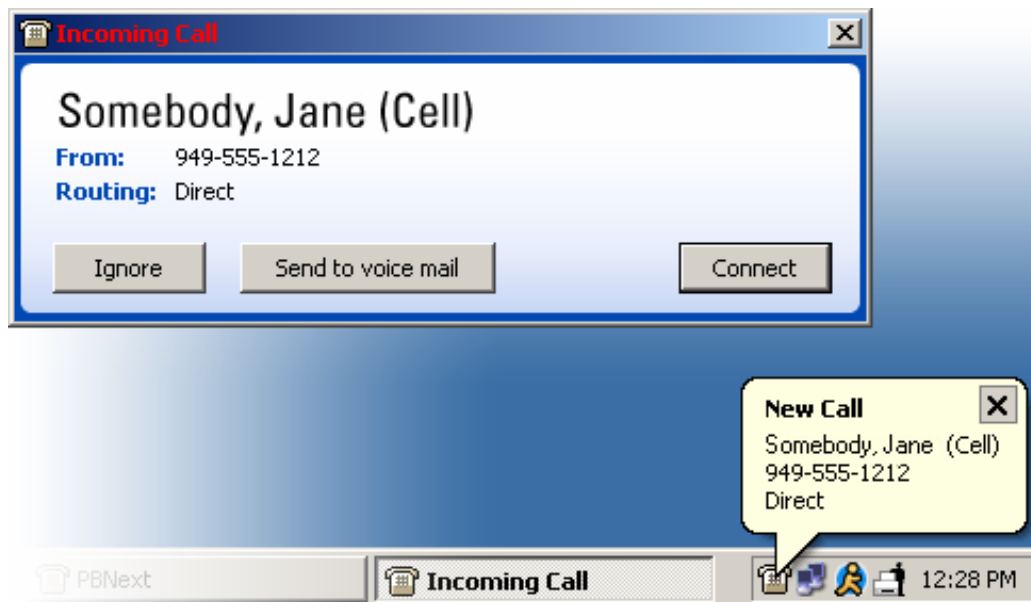


To dial a phone number, type in the phone number or use the arrow  button to select a phone number from the drop-down menu. Press Enter on your keyboard (or click the **Dial** button).

After you click the Dial button, you must wait for the *PBNext* system to call you on the phone number you entered during setup. When your phone rings pick up the receiver, *PBNext* will then call the person you selected. This will happen instantly, you will hear ringing as soon as you pick up.

RECEIVING CALLS

When someone calls your *PBNext* phone number and enters your extension number (or is placed in one of your queues), the incoming call pop-up window will appear:



- You may receive the call by clicking the **Connect** button or simply hitting the Enter key on your keyboard. Your phone will then ring, and you will be connected to the caller when you pick it up.
- You may ignore the call by clicking the **Ignore** button. If you ignore a call, it will be placed into your call waiting queue. The caller will continue to hear hold music while remaining available for other users to answer the call. (To manage your call waiting, see the next section, Call Waiting/Simultaneous Calls.)
- You may send the call to voice mail by clicking the **Send to voice mail** button. If you send a call to voice mail, the caller will be redirected to your voice mailbox. Calls sent to voicemail will not be available for answer to any user.
- To accept an incoming call when you are already on the line, click the **Connect** button. You will automatically connect to the new incoming caller and your original caller will be placed on hold in your call waiting log.

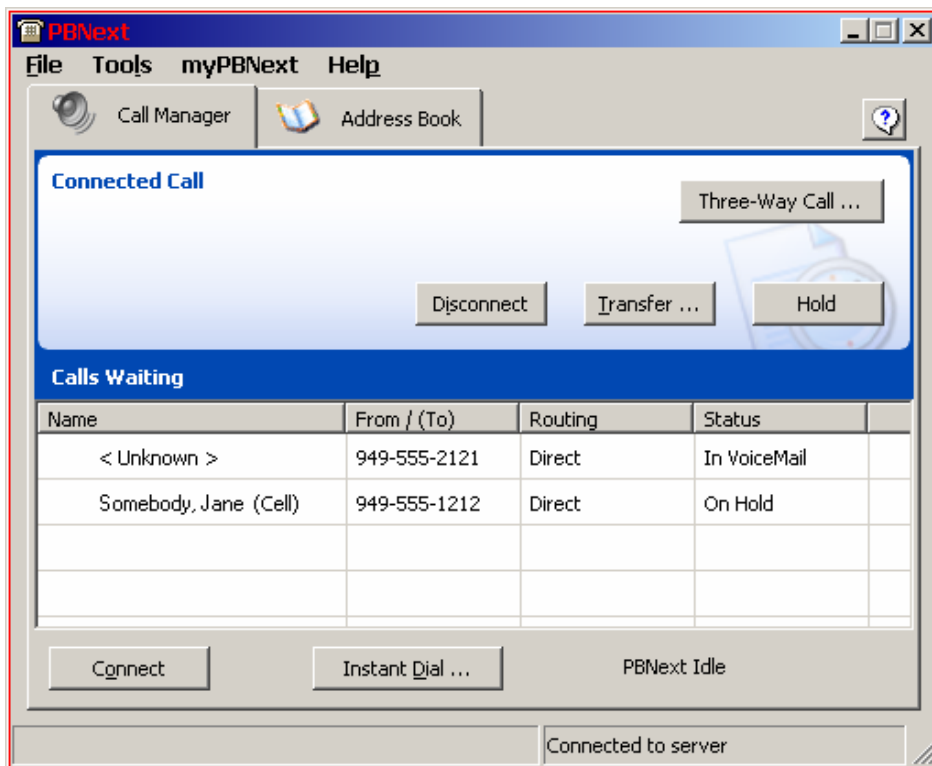
Note: If you don't take action on the incoming call, it will be automatically sent to voice mail.

CALL WAITING/TRANSFER/SIMULTANEOUS CALLS


PBNext allows you to manage simultaneous calls by putting them into your **Calls Waiting** log. The Calls Waiting log holds a list of all of the callers that are currently waiting to connect to you.

In addition to identifying calls via Caller ID, you can also see where the incoming call is routed. For example, if you are set up to answer phone calls on a Sales line and a Customer Support line, you may be waiting for a particular incoming sales call. The incoming call pop-up window will tell you where each call is directed, and you can act accordingly. *PBNext* puts you in control.

To place a call on hold, click the  button. When you place a call on hold it appears in your Calls Waiting log.



You have two options to reconnect to the call:

- If you hang up your phone, highlight the caller you wish to reconnect and then click the  button. The *PBNext* system will then call your phone; pick it up to be reconnected to the caller.
- If you didn't hang up your phone, highlight and double click the caller and your call will instantly reconnect.

PBNext allows you to **transfer** a call to another extension. This is very helpful if a caller has reached the incorrect extension and needs to speak to another user. To transfer a connected call, click the **Transfer ...** button. The following pop-up window will appear:



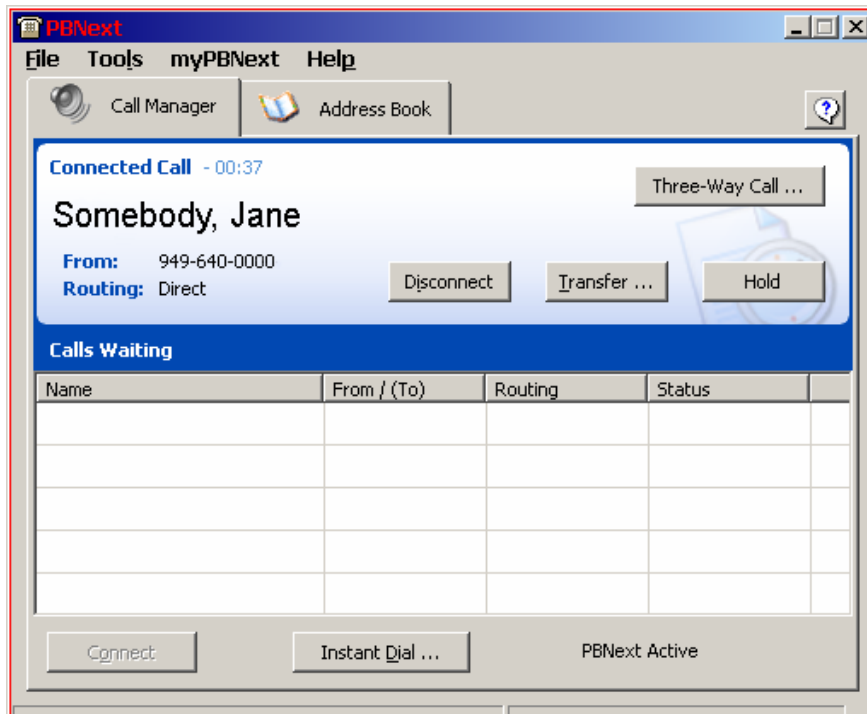
You may enter an extension number or select a name from the pull down menu. Once you have entered the appropriate extension number or name, click **Transfer ...** to send the call to that extension.

Note: *PBNext* does not support transferring calls directly to another phone number. You will have to either create a conference, or have a pre-set queue with call forwarding enabled.

THREE WAY & CONFERENCE CALLING

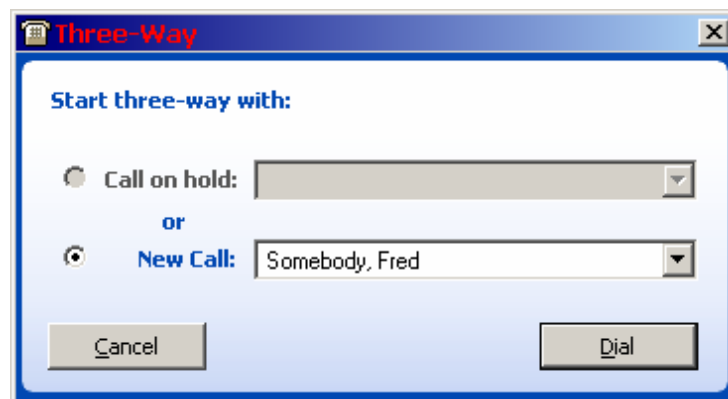
The Three Way & Conference Calling feature works in conjunction with the Call Managers' call waiting log. A conference call is similar to a three-way call, except it allows for up to eight simultaneous callers to speak to each other. If your call has a total of three callers including yourself, it's considered a three-way call. Adding the fourth caller automatically creates a conference call.

You may initiate a three-way or conference call whenever you have a caller connected. When that is the case the **Three-Way Call ...** button is enabled on the Call Manager screen (as shown below).



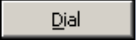


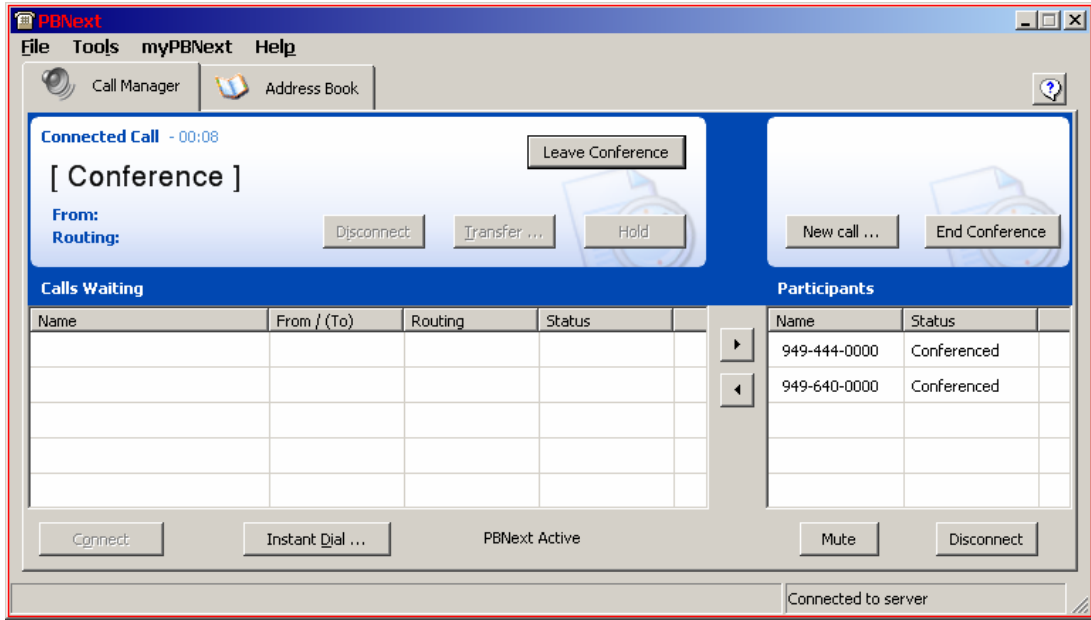
To create a three-way call:

- Click the **Three-Way Call ...** button. The **Three-Way** pop-up window will appear:



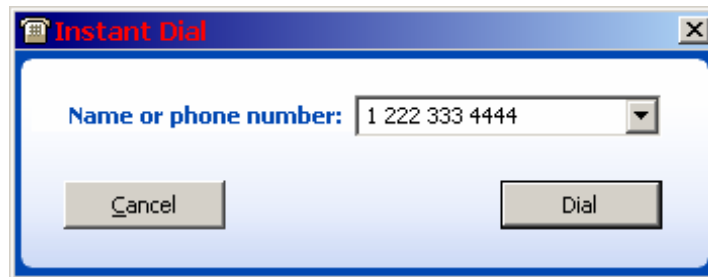
THREE WAY & CONFERENCE CALLING (CONTINUED)


- Select  **New Call**.
- Type in the phone number you want or, using the arrow  button, select a name from the drop down list.
- Click the  button. The Call Manager screen will expand to show the conference call area and both you and the original caller will hear the phone ringing the third party's number.



To add up to eight additional callers repeat the process below for each new caller you wish to add:

- Click the  button. The **Instant Dial** pop-up window will appear:

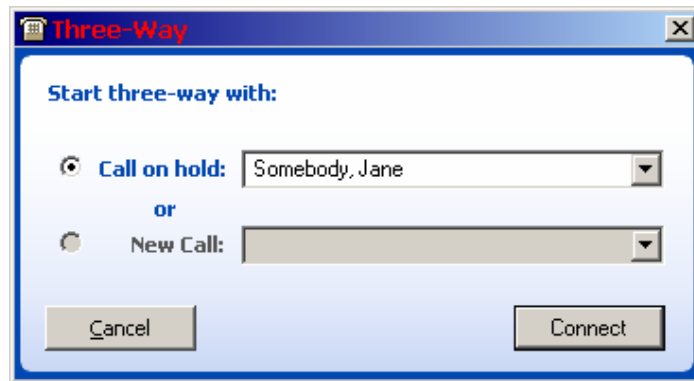


- Type in the phone number or use the arrow  button to select a phone number from the drop-down menu. Press Enter on your keyboard (or click the  button). After you click the Dial button, *PBNext* will call the person you selected.

THREE WAY & CONFERENCE CALLING (CONTINUED)

If you have callers on hold that you want connected to your three-way or conference call:

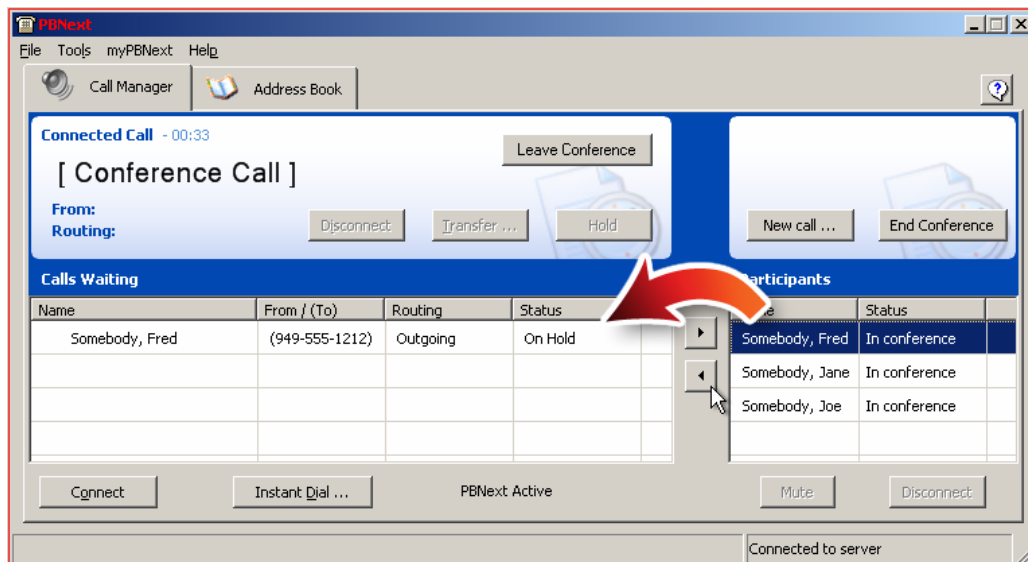
- Select the callers name from the Calls Waiting list and click on the **Three-Way Call ...** button. The **Three-Way** pop-up window will appear:



- Select **Call on Hold**.
- Using the arrow button, select the caller from the drop down list and then click the button.


If you want to disconnect someone from a three-way or conference call,

- Highlight the caller in the Participants list. To do so, click on the button.




- Click the left arrow button (located between the Calls Waiting list and Participants list). The caller will be placed on hold in your Calls Waiting list.

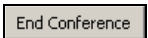
THREE WAY & CONFERENCE CALLING (CONTINUED)

- To bring the caller back, highlight the caller in the Calls Waiting list and click the right arrow  button.

If you want to leave the conference call temporarily,

- Click the  button. Everyone else will remain in your conference call, and will be listed in your call waiting log. You can reconnect to the conference call the same way you connect other users on hold.


If you are ready to end your conference call

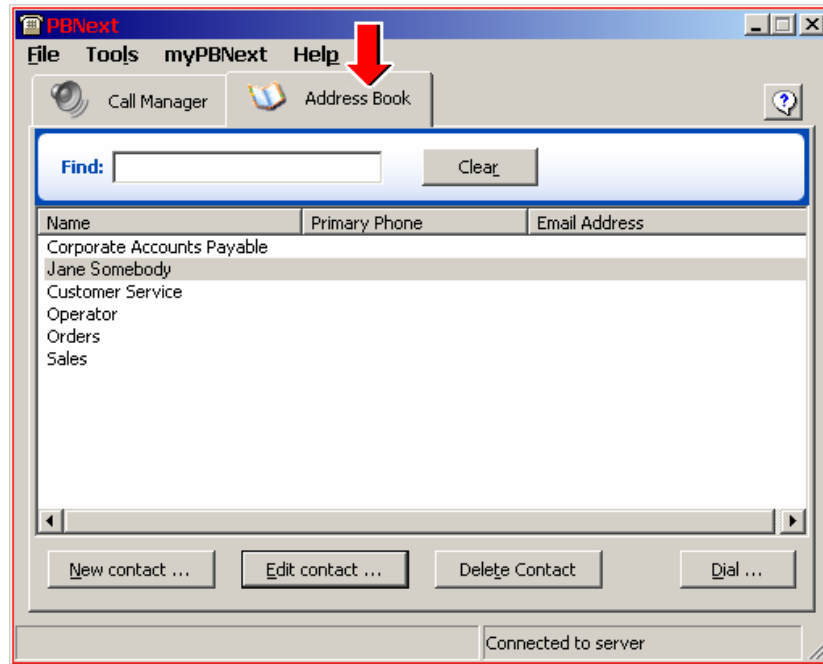
- To disconnect a caller, highlight the caller and click the Disconnect button. To end a conference and hang up on all callers, click  button.

Note: Make sure you disconnect all callers. If you don't disconnect them, the callers that remain on the line can continue to talk to each other. Usage charges still apply until all callers have hung up or "End Conference" is clicked.

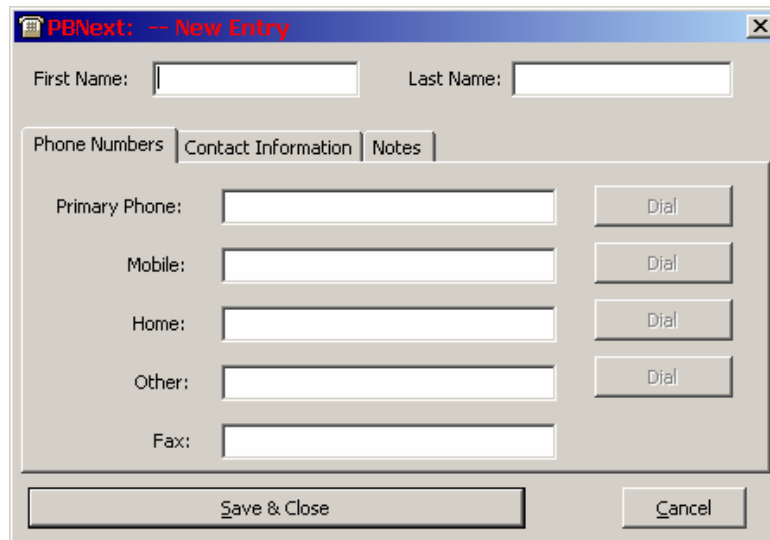
USING THE ADDRESS BOOK

PBNext includes a full-featured address book that's always just one click away. Here's how to manage your address book:

- In the *PBNext* window, click on the  Address Book tab.




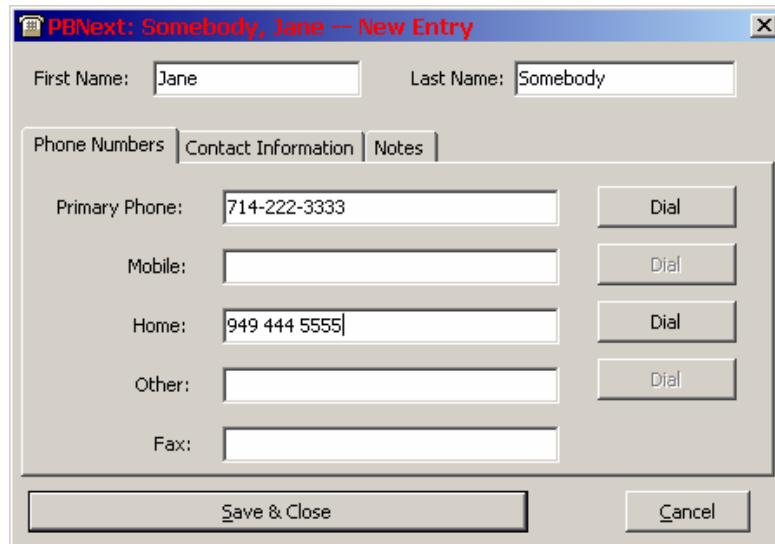
- To add a new contact to your address book, click on the  button. The New Entry window (shown below) will appear.





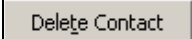
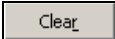

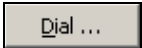
- Select the **Phone Numbers**, **Contact Information**, or **Notes** tab and type in your contact's information. Click the  button to finish.

USING THE ADDRESS BOOK (CONTINUED)

- To edit an existing contact, click the name in the contact list you would like to update and then click the  button. The **New Entry** window (shown below) will appear.



The screenshot shows a window titled "PBNext: Somebody, Jane -- New Entry". It contains fields for "First Name" (Jane) and "Last Name" (Somebody). Below these are three tabs: "Phone Numbers", "Contact Information", and "Notes". The "Phone Numbers" tab is active, showing fields for "Primary Phone" (714-222-3333), "Mobile", "Home" (949 444 5555), "Other", and "Fax". Each phone number field has a "Dial" button next to it. At the bottom of the window are "Save & Close" and "Cancel" buttons.

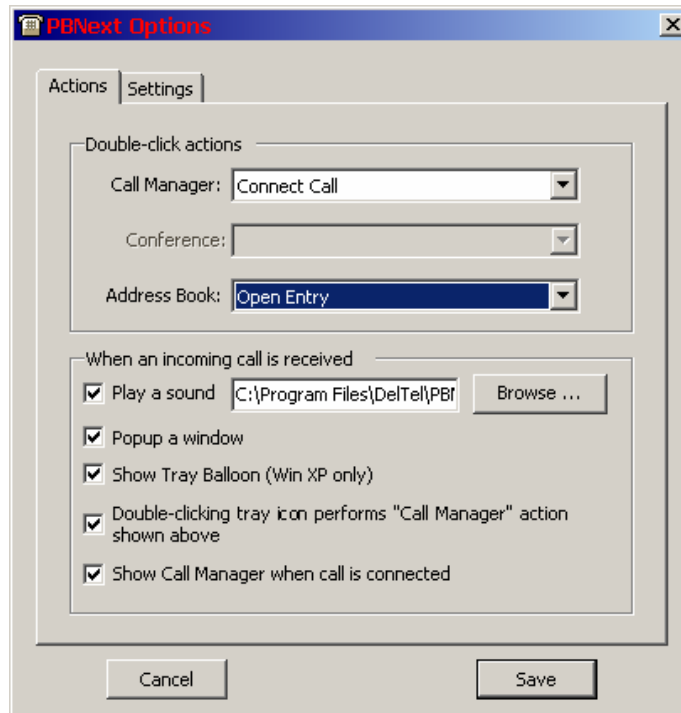
- Select the **Phone Numbers**, **Contact Information**, or **Notes** tab and type your new information in the **New Entry** window. Click the  button to finish.
- You can view details for each contact at any time by clicking on a name in the contact list and pressing the Enter key on your keyboard. The **New Entry** window will appear. You can dial the person selected using any of the phone numbers listed for them by clicking the  buttons next to each number.
- To delete a contact, click the name in the contact list you would like to delete and then click the  button.
- To find a contact without having to scroll through the list, type the first few letters of the entry you are looking for into the **Find:** box. *PBNext* automatically narrows down the list to match your criteria. You may clear the name from the **Find:** box by clicking on the  button.
- To phone a contact from the  **Address Book** tab, select an entry from the contact list and click on the  button.
- Administrators may update the addresses in the company directory by logging on to www.myPBNext.com. See the myPBNext.com User Manual for instructions.

Note: If you are not the administrator of your *PBNext* account, you will not be able to update or delete any entries created under the company directory. These entries are viewable in your personal address book by all members of a company, but are only editable by administrators.


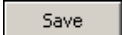


OPTIONS

The *PBNext* Options window allows you to set up options for sounds, your mouse, pop-up windows, change your local telephone number, and more.

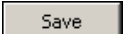
To set up options for various actions, select **Tools** from the Call Manager menu then select **Options**. The *PBNext Options* window shown below will appear. Select the **Actions** tab.



Double-click Options

- To determine what action will be performed when you double-click on a contact in the call manager contact list, use the arrow  button to select the action you want from the **Call Manager:** drop down menu then click the  button.
- To determine what action will be performed when you double-click on a contact in the address book contact list, use the arrow  button to select the action you want from the **Address Book:** drop down menu then click the  button.

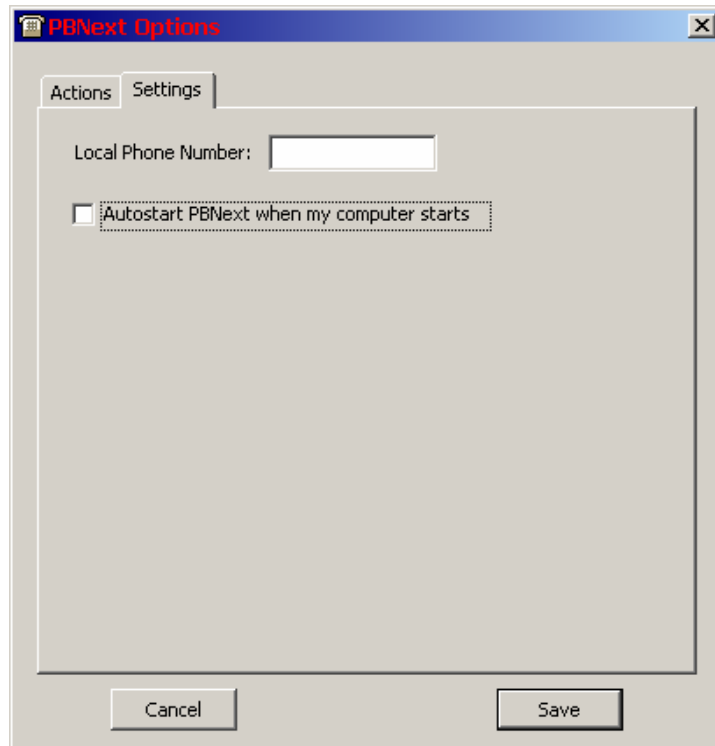
Incoming Call Options

- To determine incoming call options, read and check the options you want in the **When an incoming call is received** area, then click the  button.

OPTIONS (CONTINUED)

To set up settings options, select **Tools** from the Call Manager menu then select **Options**. The *PBNext Options* window shown below will appear. Select the **Settings** tab.

- You may change your local telephone number by typing the new number into the box. Remember, the local number entered in this field is where calls will ring when “Connect” is pressed.
- If you want *PBNext* to start automatically when you start your computer, check the appropriate box.



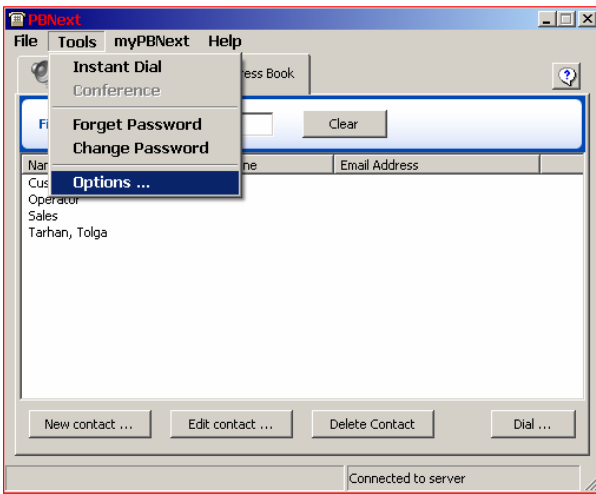
THIRD-PARTY INTEGRATION

PBNext can optionally integrate with third-party applications to provide easy access to *PBNext* functionality from other windows applications.

For example, enabling *PBNext* Internet Explorer integration searches for phone numbers within web pages loaded by Internet Explorer and changes those phone numbers into links. Internet Explorer is enabled by default.

With the *PBNext* third-party integration option enabled you can go to any website and click on a phone number to make a call.

To set the options for third-party integration, open **Tools** and select **Options** from the drop-down menu.



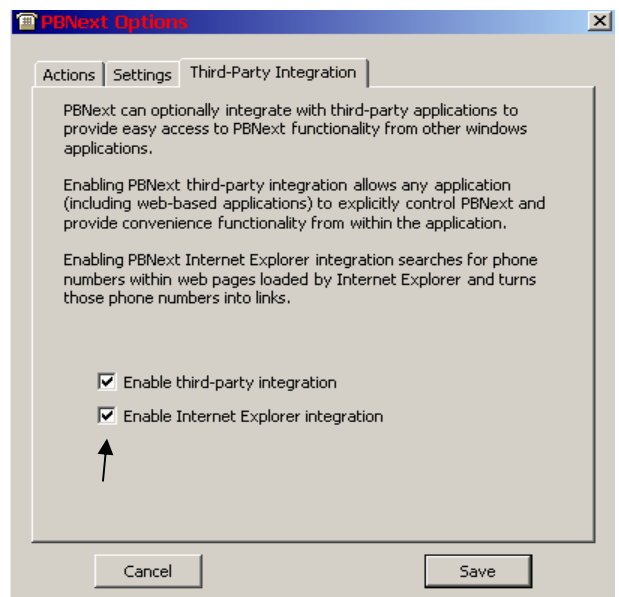
Next, select the **Third-Party Integration** tab. Enable the third-party integration check box. Internet Explorer is enabled by default. You may disable it from the menu by removing the checkmark from the check box.

INTERNET EXPLORER COMPATIBILITY

Sometimes a web page will not be compatible running phone number searches with Internet Explorer. If a page displays errors or a call cannot be made, try disabling Internet Explorer integration.

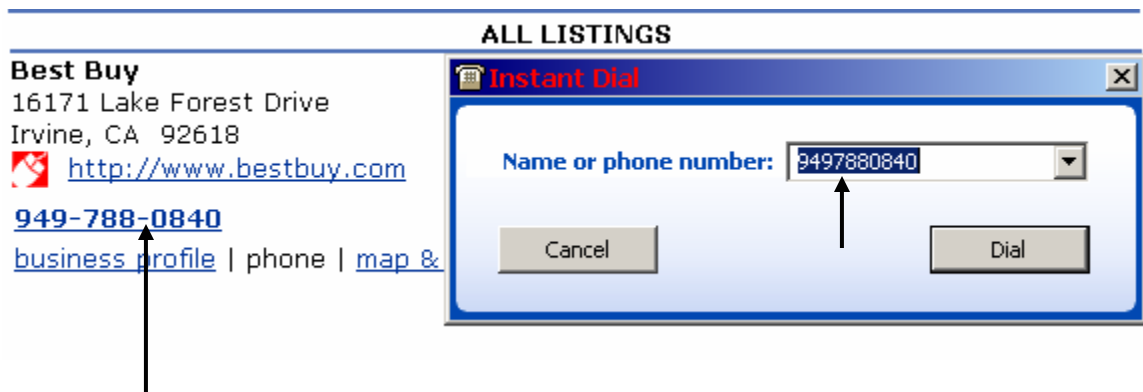
To disable Internet Explorer Integration:

1. Go back to Options and select the **Third-Party Integration** tab.
2. Deselect the checkbox next to **Enable Internet Explorer integration**.



USING INTEGRATION

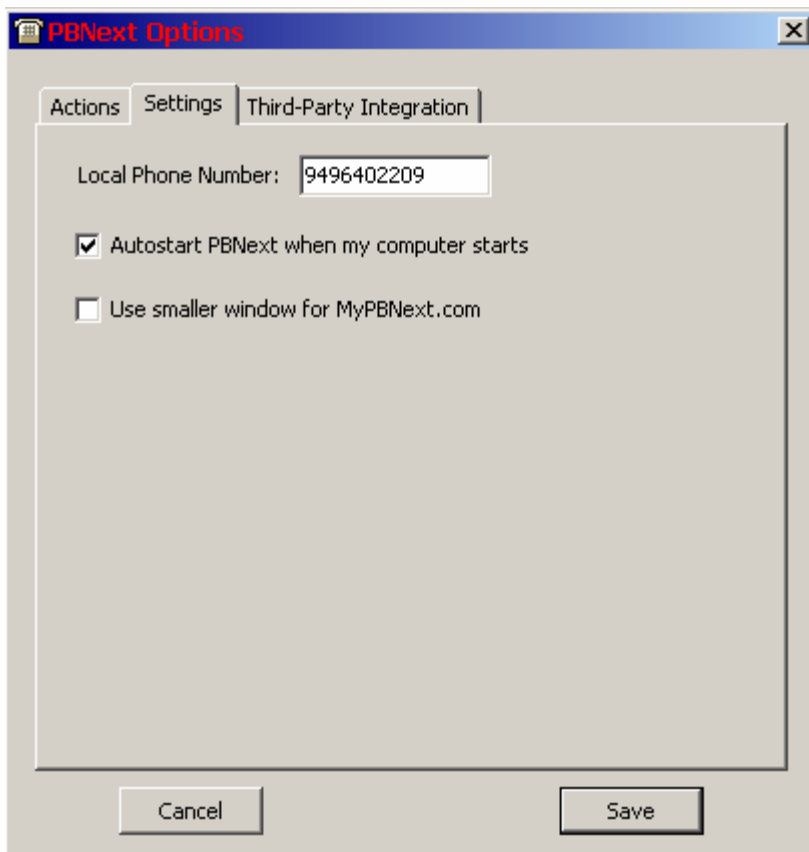
With third-party integration enabled the clickable phone numbers are indicated as an underlined link.



Click on a phone number. A message box will prompt you to dial or cancel the call.

USE SMALLER WINDOW (OPTION)

You can enable the **Use smaller window** option for the most optimal viewing experience on your monitor.

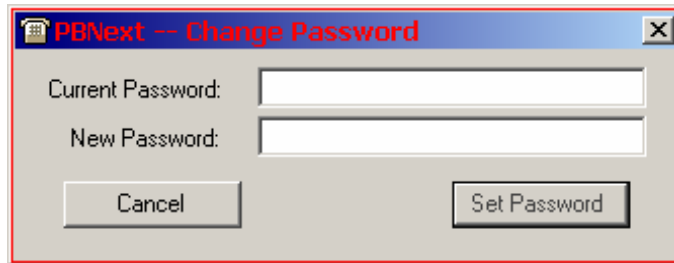


The **Use smaller window for MyPBNext.com** option is by default disabled. You can enable this option by placing a checkmark in the checkbox.

CHANGING YOUR PASSWORD

To change your password:

- Select **Tools** from the Call Manager menu then select **Change Password**. The Change Password pop-up screen will appear.

A screenshot of a Windows-style dialog box titled "PBNNext -- Change Password". The dialog box has a blue title bar with a close button (X) in the top right corner. Inside the dialog, there are two text input fields. The first is labeled "Current Password:" and the second is labeled "New Password:". Below the input fields are two buttons: "Cancel" on the left and "Set Password" on the right. The dialog box is outlined with a red border.

- Type in your current password and your new password and then click the **Set Password** button. Your password will be updated. Click the **Cancel** button to cancel the procedure.

RECORDED GREETINGS

Your *PBNNext* account is setup with default recorded greetings, but you can also contact our Professional Voice Service Department. Our Professional Voice Service Department can create and professionally record custom greetings and menu trees for you for an additional fee.

myPBNNext

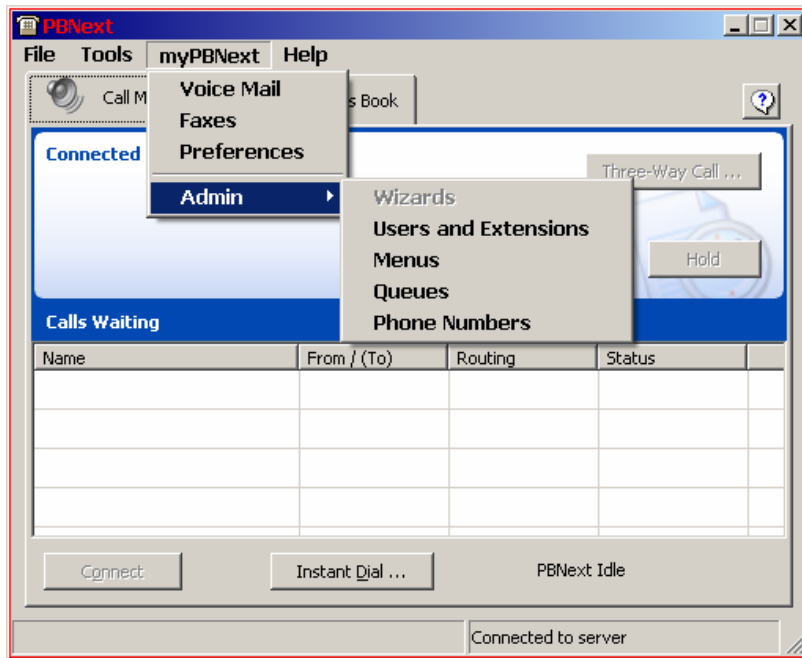
In addition to the Call Manager, *PBNNext* features a website for managing your *PBNNext* account *myPBNNext*. Using *myPBNNext* gives you the ability to:

- Check voicemail log
- Record your personal greetings
- Check inbound faxes
- Forward your calls
- Add detailed information to your address book

...and more

To gain access to *myPBNNext* select **myPBNNext** from the Call Manager menu. Selecting Voice Mail, Faxes, Preferences, or Admin will send you directly to the corresponding feature on the *myPBNNext* website.

For details on how to work with the *myPBNNext* features, see the following Help and Technical Support section for information on how to download the *myPBNNext* manual.

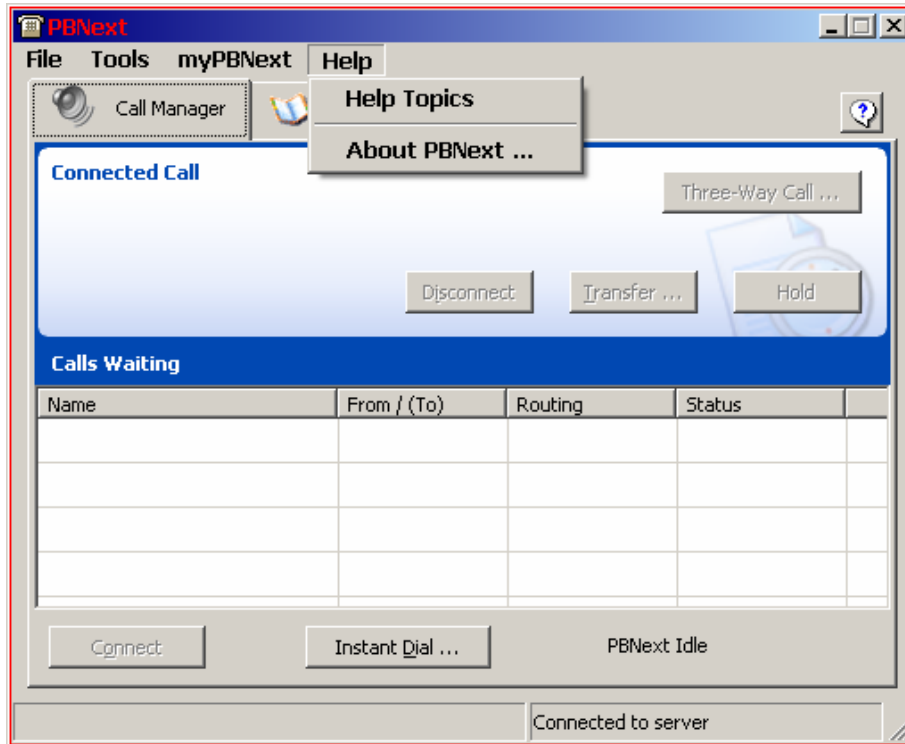


HELP AND TECHNICAL SUPPORT

Any time you need help you can call **1-877-7- PBNEXT**(1-877-772-6398) and the next available Customer Service Representative will assist you. Make sure that you have your **account number, username, and security code** ready, if you ever need to contact our Customer Support Center we will need this information. If we don't already have one on file, our system will also ask for an **email address** to send information to.

CAUTION: Do not share your password! *PBNext* representatives will never ask you for your password.

To download a copy of this manual and Acrobat Reader (if necessary) click on the **Help** icon on the Call Manager menu then click **Help Topics**.



For more information on *PBNext* log onto WWW.PBNEXT.COM. For more information about DelTel, Inc. and other services provided under DelTel, Inc. please log on to www.deltel.com.