



# **Guide to Planning and Installing Your Bizfon System**



# Guide to Planning and Installing Your Bizfon System

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## TABLE OF CONTENTS

<b>CUSTOMER SITE SURVEY</b> .....	<b>1</b>
<b>CUSTOMER INFORMATION</b> .....	<b>1</b>
<b>PART 1 – EMPLOYEE AND LOCATION INFORMATION</b> .....	<b>2</b>
<b>PART 2 – PHONE SYSTEM</b> .....	<b>3</b>
VOICE SERVICE DELIVERY .....	3
CURRENT PHONE SYSTEM .....	4
BIZFON SYSTEM CONFIGURATION.....	5
PHONE SYSTEM FEATURES .....	7
BIZFON PHONE DEFINITIONS .....	9
BIZTOUCH™ IP2 CONFIGURATION .....	11
<b>PART 3 – IT ENVIRONMENT</b> .....	<b>16</b>
<b>PART 4 – UNIFIED MESSAGING</b> .....	<b>19</b>
<b>PART 5 – PHYSICAL INFRASTRUCTURE</b> .....	<b>20</b>
<b>PART 6 – DOCUMENTATION</b> .....	<b>21</b>



## Guide to Planning and Installing Your Bizfon System

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### CUSTOMER SITE SURVEY

#### CUSTOMER INFORMATION

**NOTE: Affix Contact's business card here if available:**

Company Name:

Primary Contact/Title:

Address:

Phone/Fax Number:

E-mail Address:

Company Website URL:

Business Type:



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### **PART 1 – EMPLOYEE AND LOCATION INFORMATION**

1. Number of locations:
  
2. Address of locations:
  
3. Number of Employees:
  
4. Client Information: Please list Employee Information, including name and title, contact information, and e-mail address:
  
5. Are there multiple offices - Will you be interconnecting locations using our site-to-site feature (requires multiple Bizfon 7000 Servers and a VOIP key)?
  
6. Are you going to have remote users or satellite offices (Requires multiple Bizfon Servers and a VOIP key)?
  
7. What is your current site-to-site connection method (for example, VPN)?



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### PART 2 – PHONE SYSTEM

#### Voice Service Delivery

1. Who currently is your supplier for Voice Service?
2. How is the current voice service delivered from your provider?
3. Do you currently send your voice over the Internet (VOIP, i.e., Vonage, CallVantage)?
4. If so, who is your Internet Telephony Service Provider (ITSP)?
5. How many outside lines (also known as Central Office Lines) do you currently have?
6. How are the lines provisioned (DID, Inbound vs. Outbound)
7. What features do you get from your telephone service provider?
8. How many Fax Lines do you currently have?
9. How many Alarm Lines do you currently have?
10. Will the Fax or alarm lines be connected through the Bizfon 7000 server?



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### Current Phone System

1. What is the manufacturer and model number of your current phone system (for example, Toshiba, Nortel, etc.)?
2. When did you purchase your existing system?
3. What do you like about your current system?
4. What do you dislike about your current system?
5. What is the manufacturer and model number of your phones (handsets)?  
**NOTE: Proprietary handsets are not reusable in the Bizfon system.**
6. How many phones do you currently have?
7. What is the manufacturer and model number of your Wireless and Cellular phone?
8. How many Wireless/Cellular phones do you currently have?
9. How do you currently answer incoming calls?



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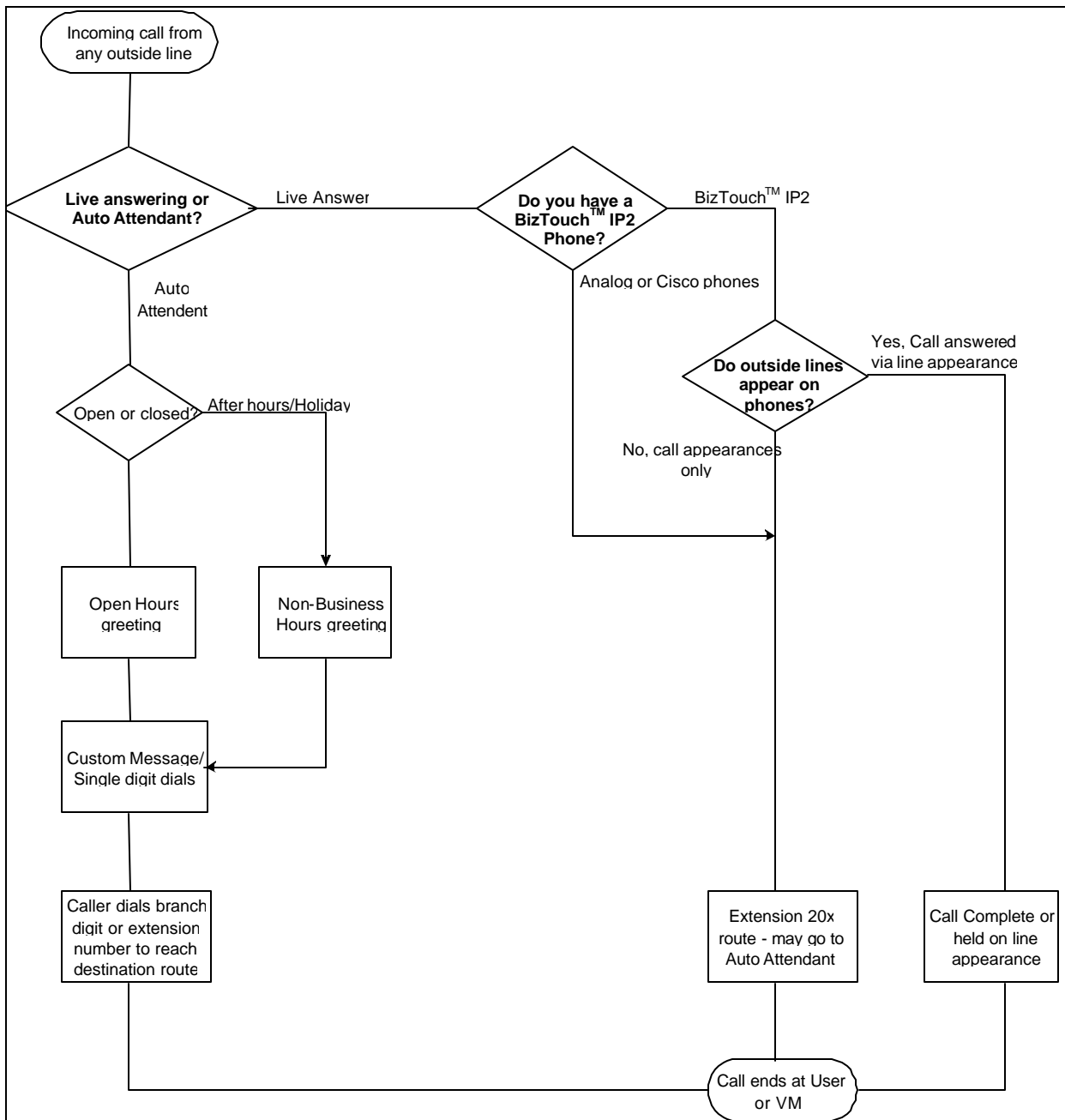
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### Bizfon System Configuration

1. Describe how incomings calls will be handled during business and after hours. (Use diagram on following page).
2. How many users/extensions will be required?
3. How many system extensions such as Conference rooms, Lobby phones, etc. will be required?
4. What is the total number of phones required?
5. Are there special handset restrictions required (private lines or separate businesses)?
6. Will you require Service groups for Least Cost Long Distance route (outside resource seize order)?
7. Are there any Local Area Code dialing requirements (7, 10, or 11 digits)? If so, please specify:



# Guide to Planning and Installing Your Bizfon System







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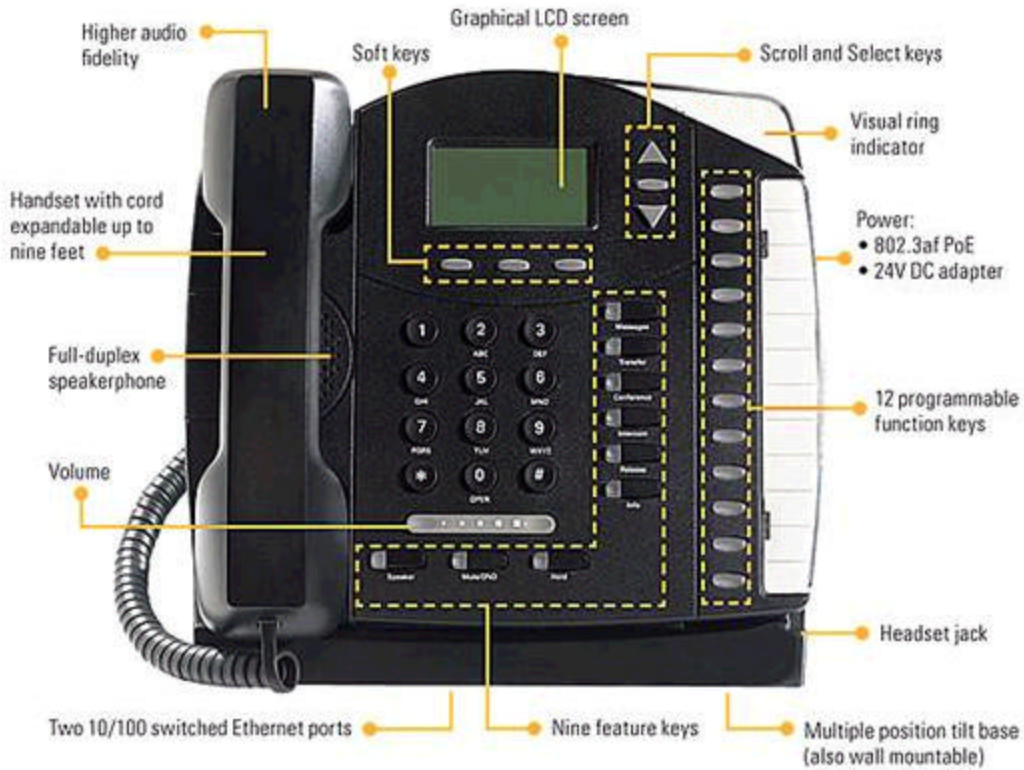
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### Phone System Features

<b>Feature</b>	<b>Current System Yes/No</b>	<b>Desired Yes/No</b>
Auto Attendant		
Call detail records		
Call Park/Retrieve		
Call Transfer (Blind/Announced)		
Call Waiting		
Caller ID		
Conference Calling		
Group Extensions/mailboxes. such as sales, service, etc.		
Handset-Handset(s) paging		
Multiple Auto Attendants		
Music On-Hold/Custom On-Hold messages		
Overhead Paging		
Restricted outbound calling		
Shortcuts from Auto Attendants – single digit shortcuts such as sales, support, billing, etc.		
Voice Mail for users/# of ports		



## BizTouch™ IP2





### Bizfon Phone Definitions

**Programmable Feature Keys (PFKs)** – These are the buttons that will be programmed by your System Administrator in the configuration that best suits your needs. The BizTouch™ IP2 model has twelve programmable buttons. The following definitions, describe (in order of how they appear in the Web Administration on the Server) how each button can be configured. Following the descriptions is a worksheet that should be filled out for each user.

**Line Appearance** – When defined as a Line Appearance button, the user has the ability to monitor a specific outside line (FXO/DID loops). With an incoming call, all the users monitoring that specific outside line will have their phones ring. Unless you use the Hold function, selecting another line appearance line means that you will hang up on the first Line Appearance call. This is typically a Key System function. Line Appearance has a Ring Type associated with it and must be specified.

**Ring Type** – Bizfon phones can ring with different patterns and tones. Ring Types are associated with Line Appearance and Call Appearance and must be specified.

**Direct Station Selection/Busy Lamp Field (DSS/BLF)** – When defined as a DSS/BLF button, you will have the ability to connect to another user's phone using the intercom channel and the ability to monitor the status of that user's phone.

**NOTE: In order for this button to work in DSS/BLF mode, the System Administrator must select Key System Mode when configuring the buttons.**

**Speed Dial/Busy Lamp Field** – When defined as a SD/BLF button, you will have the ability to ring another user's extension and the ability to monitor the status of that user's phone.

**NOTE: In order for this button to work in SD/BLF mode, the System Administrator must select PBX Mode when configuring the buttons.**

**Speed Dial** – When defined as a Speed Dial button, you will have the ability to ring another user's extension without having to dial the extension number.

**Call Appearance** – When defined as a Call Appearance button, you will have the ability to receive calls targeted for your extension. You may have multiple buttons configured for Call Appearance, which you can manage individually. For example, each call can be put on hold or transferred to another extension. Call Appearance has a Ring Type associated with it. Please see the description above for the Ring Types.

**Function**– A programmable button can be defined as a Function with the choices being Centrex Flash, Headset, Personal Speed Dial, and Redial. When defined as line flash, you can directly flash an outside phone line to access services provided by your phone company, such as call forwarding, conferencing, etc.

**Headset** – When defined as a Headset function, this button will allow you to transfer your conversation to a headset if connected.

**Personal Speed Dial** – When defined as a Personal Speed Dial function, this button will call your personal contacts, such as home, a supplier, or customer. The user, within the Configuration menu on the phone defines Personal Speed Dial numbers.



## Guide to Planning and Installing Your Bizfon System

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**Redial** – When defined as a Redial function, this button will redial the last call made by the user.

**Not Used** – When defined as Not Used, this button will not be usable by the user.



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### BizTouch™ IP2 Configuration

Employee Name: \_\_\_\_\_

Employee Location: \_\_\_\_\_

Button	Selection
PFK #12	<ul style="list-style-type: none"><li><input type="radio"/> BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode)</li><li><input type="radio"/> Call Appearance (include Ring Type)</li><li><input type="radio"/> Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)</li><li><input type="radio"/> Line Appearance (include Ring Type)</li><li><input type="radio"/> Not Used</li><li><input type="radio"/> Queue Appearance</li><li><input type="radio"/> Speed Dial</li></ul>
PFK #11	<ul style="list-style-type: none"><li><input type="radio"/> BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode)</li><li><input type="radio"/> Call Appearance (include Ring Type)</li><li><input type="radio"/> Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)</li><li><input type="radio"/> Line Appearance (include Ring Type)</li><li><input type="radio"/> Not Used</li><li><input type="radio"/> Queue Appearance</li><li><input type="radio"/> Speed Dial</li></ul>



## Guide to Planning and Installing Your Bizfon System

PFK #10	<ul style="list-style-type: none"><li>○ BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode)</li><li>○ Call Appearance (Include Ring Type)</li><li>○ Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)</li><li>○ Line Appearance (include Ring Type)</li><li>○ Not Used</li><li>○ Queue Appearance</li><li>○ Speed Dial</li></ul>
PFK #9	<ul style="list-style-type: none"><li>○ BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode)</li><li>○ Call Appearance (include Ring Type)</li><li>○ Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)</li><li>○ Line Appearance (include Ring Type)</li><li>○ Not Used</li><li>○ Queue Appearance</li><li>○ Speed Dial</li></ul>
PFK #8	<ul style="list-style-type: none"><li>○ BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode)</li><li>○ Call Appearance (include Ring Type)</li><li>○ Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)</li><li>○ Line Appearance (include Ring Type)</li><li>○ Not Used</li><li>○ Queue Appearance</li><li>○ Speed Dial</li></ul>



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PFK #7	<ul style="list-style-type: none"><li>○ BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode)</li><li>○ Call Appearance (include Ring Type)</li><li>○ Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)</li><li>○ Line Appearance (include Ring Type)</li><li>○ Not Used</li><li>○ Queue Appearance</li><li>○ Speed Dial</li></ul>
PFK #6	<ul style="list-style-type: none"><li>○ BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode)</li><li>○ Call Appearance (include Ring Type)</li><li>○ Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)</li><li>○ Line Appearance (include Ring Type)</li><li>○ Not Used</li><li>○ Queue Appearance</li><li>○ Speed Dial</li></ul>
PFK #5	<ul style="list-style-type: none"><li>○ BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode)</li><li>○ Call Appearance (include Ring Type)</li><li>○ Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)</li><li>○ Line Appearance (include Ring Type)</li><li>○ Not Used</li><li>○ Queue Appearance</li><li>○ Speed Dial</li></ul>



## Guide to Planning and Installing Your Bizfon System

PFK #4	<ul style="list-style-type: none"><li>○ BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode)</li><li>○ Call Appearance (include Ring Type)</li><li>○ Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)</li><li>○ Line Appearance (include Ring Type)</li><li>○ Not Used</li><li>○ Queue Appearance</li><li>○ Speed Dial</li></ul>
PFK #3	<ul style="list-style-type: none"><li>○ BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode)</li><li>○ Call Appearance (include Ring Type)</li><li>○ Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)</li><li>○ Line Appearance (include Ring Type)</li><li>○ Not Used</li><li>○ Queue Appearance</li><li>○ Speed Dial</li></ul>
PFK #2	<ul style="list-style-type: none"><li>○ BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode)</li><li>○ Call Appearance (include Ring Type)</li><li>○ Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)</li><li>○ Line Appearance (include Ring Type)</li><li>○ Not Used</li><li>○ Queue Appearance</li><li>○ Speed Dial</li></ul>





## Guide to Planning and Installing Your Bizfon System

PFK #1	<ul style="list-style-type: none"><li>○ BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode)</li><li>○ Call Appearance (include Ring Type)</li><li>○ Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)</li><li>○ Line Appearance (include Ring Type)</li><li>○ Queue Appearance</li><li>○ Speed Dial</li><li>○ Not Used</li></ul>
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### PART 3 – IT ENVIRONMENT

*Use the Network Topology diagrams as discussion points and examples of typical configurations, and attach to survey.*

1. Who services your network?
  
2. Who is your Internet Service Provider?
  
3. What type of connection to your site?
  - T1, DSL, Cable Modem
  
  - What is the Speed and Bandwidth?
  
4. What is the manufacturer and model of your modem/IAD?
  
5. Addresses from ISP
  - Static IP address
  - Subnet Mask
  - Primary & Secondary DNS servers
  
6. Do you have any network devices (Firewall, Router, or Switch)?
  
7. If so, what are the manufacturer and model numbers?



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8. Please diagram the network topology.



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9. What is the Network Server?

10. Who hosts your website?

11. What is the format of your website (FrontPage, Coldfusion, etc.)?

12. Where is your e-mail hosted and how do you currently receive you mail?

13. What is the number of e-mail users?

14. Will you use Bizfon 7000 as your primary mail server or web site host?

15. Are there any other Servers/Applications?

16. Will Bizfon be the main gateway to the Internet or will it be a device on another network?

- Main Router/Firewall
- Host on LAN



## Guide to Planning and Installing Your Bizfon System

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### **PART 4 – UNIFIED MESSAGING**

The Unified Messaging allows the user to access and manage their voice and e-mail in one inbox. Unified Messaging requires the use of a messaging POP3 compatible e-mail client tool, such as Microsoft Outlook Express™ or Microsoft Outlook™, or Lotus Notes® and a media player, such as RealAudio™, Liquid Audio™, or Microsoft Player™ (format of audio is .wav), along with a functioning audio card and speakers.



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### PART 5 – PHYSICAL INFRASTRUCTURE

1. Where will the Bizfon 7000 unit be installed?

**NOTE: The Bizfon 7000 unit can be installed in a 19” rack, wall, or tabletop mounted.**

2. Where is the Demarcation Location (Point of phone service delivery):

3. Will new wiring be required?

**NOTE: Bizfon 7000 requires RJ-11 two wire, center pair plugs for all analog telephony connections.**

4. Does any existing wiring need to be re-located?

5. Will new wiring be required for Network or VOIP Phones?

**NOTE: Bizfon 7000 requires CAT5 or better cabling for Network devices.**

6. Is adequate backed up power available (separate breaker recommended with some form of UPS)?



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### PART 6 – DOCUMENTATION

Documentation and software are available at:

<http://www.bizfon.com>

#### Completed

Name: \_\_\_\_\_ Date: \_\_\_\_\_

#### Approved

Name: \_\_\_\_\_ Date: \_\_\_\_\_