

FreePBX Phone System Project ReadMe

Requirements

1. Business Scenario
 - a. Dental Management Group
 - b. Manage 2 offices plus central call facility
 - c. Each Office Front Desk is actually 3 desks and currently 3 desk phones
 - d. Ring pattern should be:
 - i. 1st Attempt : Call Center ACD
 - ii. 2nd Attempt: First Attempt + Office 1 Front Desk + Office 2 Front Desk
 - iii. 3rd Attempt: All of 2nd Attempt + Managers Desk Phones
2. Installation
 - a. Need full step by step instructions starting from Windows Server 2016 Hyper V
 - b. Dedicated NIC on the HyperV Server to the FreePBX Server
 - c. Server Hardware (Hyper V Host) Dell PowerEdge with dual power and SSD's
3. ACH Call Distribution Groups (Essential)
 - a. Users ability to sign into groups / call queues to start and stop receiving calls
 - b. Overflow to other extensions when the call queue is not covered by any agents or call wait time is long
 - c. Caller notification of position in the queue and wait time
 - d. Ability to call the caller back. (not required)
4. Reports
 - a. By Agent (**important**)
 - i. Time logged into Distribution Group / ACD
 - ii. Total Calls Handled
 - iii. Calls Not Answered (rang but let go unanswered)
5. Trunks
 - a. Twilio.com will provide Sip Trunks

6. Phones

- a. YeaLink mostly
- b. Polycom VVX600

7. Outbound Dialing

- a. We have 3 office locations , when agents are dialing out we need to be able to dial from the local office phone number if possible.

8. Softphones

- a. We are leaning towards using SoftPhones more and more on each desktop and user's laptops
- b. Can SoftPhones and Desktop phones be used side by side, how does that work with Call Queues etc. If a user has both SoftPhone on their laptop and DeskPhone at the same time. How does it ring? Which one rings?
- c. What softphone clients are recommended?

9. Floating Desks

- a. More of our workstations are becoming floating. The phone are labeled Phone 101, 102, 103
- b. We need agent to be able to sit at any desk and log into their Queues etc
- c. Curious how this works with a soft phone and desk phone at the same time.

10. Deliverables

- a. Fully Setup FreePBX System
 - i. Twilio Trunks
 - ii. Phone Config Instructions
- b. Documentation on Installation
 - i. Starting from Blank Windows 2016 Server
 - ii. Where to download files
 - iii. License Keys in this doc
 - iv. 3rd party Add-ons needed
- c. Documentation on Backup Procedure
- d. Documentation on Disaster Recovery
- e. List of Add Ons needed for FreePBX to work as desired

11. FailOver Internet Outage

- a. Decide what happens when internet at PBX Site fails over

12. Server

- a. Windows Server 2016 Hyper Host

- i. Guest will be Linux for FreePBX
- ii. Any ram or resources needed
- iii. WE can dedicate NICS for Trunks and or internal phones,
 - 1. Host server has a ton of NICs

13. Consulting Questions

- a. What 3rd party Add-ons will we need for advanced features like Call Distribution Groups and the needed reports above?

14. Number of Agents

- a. Approx 10
- b. Maximum 20