



Switchboard

User Guide



The Switchboard helps to view and manage calls and queues very efficiently. You can pair the Switchboard with your Desk Phone or Softphone Apps! A great tool for call control as well as for remote workers!

Switchboard is more advanced and efficient call management!

Log onto your **Switchvox** User Portal.

Once logged onto the website, click here to load the **Switchboard**:



You will see a **Tool Bar** on top right of screen.



Your Account.
Go back to User portal /
Log out of Switchvox



Tour: Link that directs you to Sangoma **Switchvox Switchboard** Training Videos.



Layouts: Create/Edit personal Widget Layouts on Home Screen.
(See **Switchboard Layouts**)



Status: Update your Status. You can also add personal messages to your status for a more detailed explanation.



Settings: Choose the type of notifications you would like to get. Edit which device you would like to make call through Switchboard.



Notifications: See notifications that have occurred in the past.

Switchboard *Device Setup / Dialing*

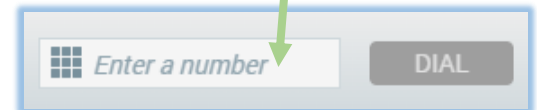
The Switchboard can pair up with any device associated with an extension. Once the device is paired, you can then use the Switchboard dial pad to make calls with that device!

Click  to access **Settings**.

Under “Additional Phones”, choose the device you want paired with **Switchboard**



Use the Dial Pad (on top of screen) to make calls from that device.

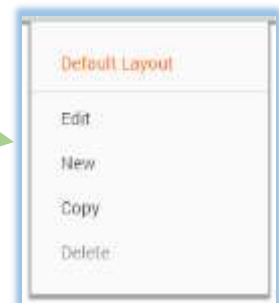


Switchboard *Layouts:*

Unless your local Admin has created a default Switchboard layout, your main Switchboard screen will be blank. You will need to populate the screen with the widgets that you find useful for your operations.

To add widgets to your page, click on the “**Layouts**” icon. 

A tab will open where you can edit, delete, copy the current layout, or create a new one. Since this is a blank layout, we can choose “edit”.



You will see a “**Layout Editor**” toolbar on the top of page.



Select “**Add Widget**”.

You will get a list of available widgets you can add to your main page. Once added to screen, you can then:

Move widget around page



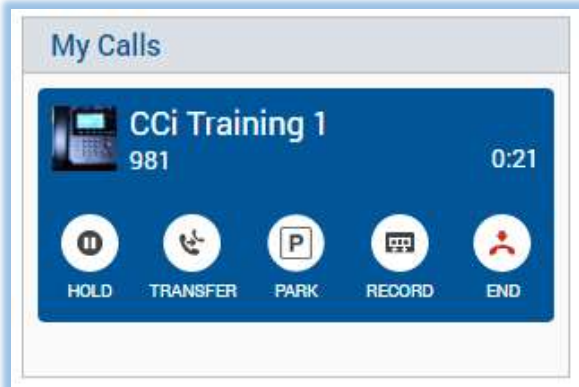
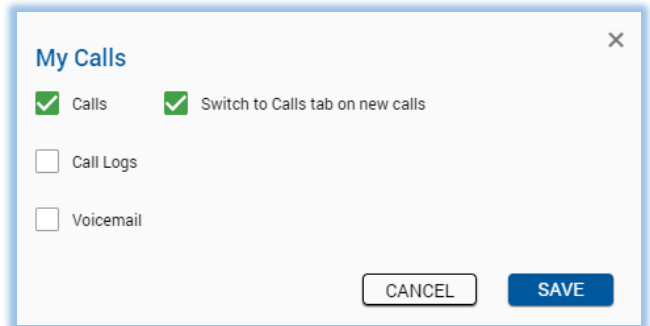
Remove Widget from page.

Edit settings of widget.
(see *Widgets*. Next section)

Switchboard Widgets:

My Calls

When adding the **My Calls** widget, you can choose what features you would like on the widget. You can also have the **Voicemail** and **Call Log** as separate widgets.



View the *call* that you are on.
(Using desk phone, **Sangoma Talk**, or **Sangoma Phone** for desktop).

Manage multiple calls more efficiently.

Full call control:
Hold – Transfer – Park – Record – End Call



- Click to place caller on hold. Click  to retrieve caller from Hold.



- Click to start the Transfer process. Click  to cancel Transfer.



- Click to park the call in an extension. Use the **Park Calls** widget to retrieve caller!



(If allowed by your local Admin) - Click to start recording the call. Click  or  to stop the recording.

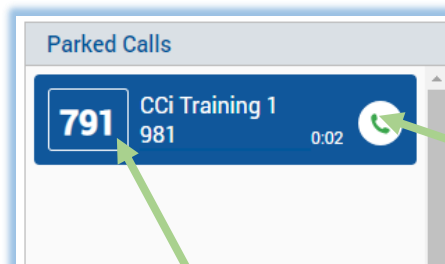
** Recordings are saved in your Voicemail Recordings folder. Can be accessed by desk phone or user portal. **



- Click to end call

Parked Calls

When adding the **Parked Calls** widget, you can easily retrieve any call that is parked by your business

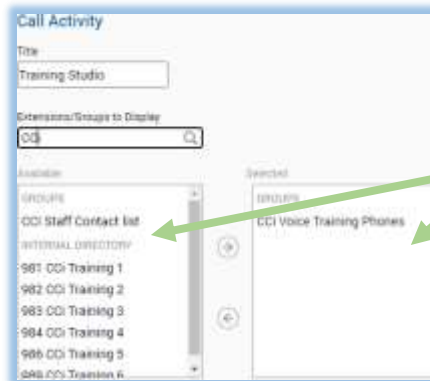


Click to answer
Parked Call

Parking Lot Ext # caller is in.
(You can also dial this number to retrieve call)

Call Activity

See, in real time, coworkers' statuses.
Who is on a call and for how long.
Open up their "Call Card" to get their information and perform phone operations (Dial, Transfer, etc)



Add from your Contacts who you would like on your Call Activity Widget
(Click from contact window on left and add to widget window on right)

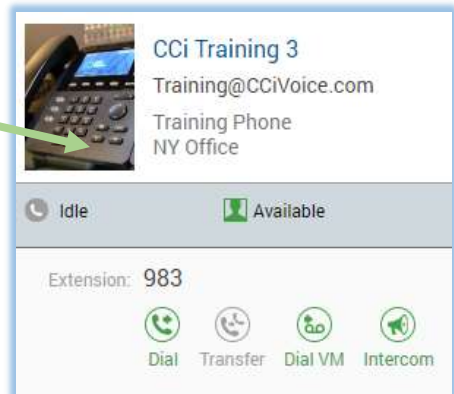
See coworker's **status** in real time

Training Studio			
MEMBER		CALLER	DURATION
CCi Training 1	981	-	-
CCi Training 2	987	-	-
CCi Training 3	983	-	0:15
CCi Training 4	984	-	-
CCi Training 5	986	-	1:07
CCi Training 6	989	-	-

See who is on the phone at that moment and how long they are on call.

Clicking on the Contact's name will bring up their **Call Card**.

- See their Contact info
- See if they are busy on phone
- See their Status
- Dial their ext. - Dial their VM - Intercom



Queues

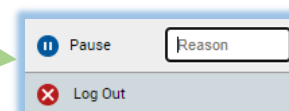
If you are member of a Call Queue (Hunt Group) you can easily monitor your queue calls. You can also set alerts to notify you if a caller has been waiting a certain amount of time!

My Queues: See your activity in queue you are part of.
(Taken/Missed Calls, "Wrap-Up" time.)

QUEUE	WRAP-UP	LOG IN	TAKEN	MISSED
All Queues				
Test Queue			5	1

My Queues
Queue Overview
Queue Calls Waiting
Queue Member Activity
Wallboard

If you are a "Log In" member of a queue, you can **Log Out** or **Pause** your queue calls.



Queue Overview: See the activity of the members in the queue you are part of. See other members Login Status as well.

QUEUE	WAITING		MEMBERS		PAST CALLS				
	CALLS	TIME	IN	BUSY	TAKEN	MISSED	ABD	AVG	
Test Queue [A]	0	-	2	0	8	10	6	0:16	
CCi Training 1			✓		6	10			
CCi Training 2			✗		0	0			
CCi Training 3			✓		2	0			
CCi Training 4			✗		0	0			

Queue Calls Waiting: See all callers on line that have not been answered yet.

CALLER	PHONE	WAIT
1 CCI Training 2	982	0:23

As a user, you have the ability to get notified on your computer if a caller has been waiting in the queue for a defined amount of time.

In the **Queue Calls Waiting** widget's settings, you can enter the amount of time the caller waits until you get a notification.

Waiting time threshold (seconds)

☐ Raise notification when threshold is passed

CANCEL SAVE

Click to receive an audible alert on your computer

Click to save settings

Queue Member Activity: Similar to the **Call Activity** widget. This will show members of your Call Queue only.

Queue Member Activity - Test Queue				
MEMBER NAME	LOGIN	CALLER	DURATION	
1 CCI Training 1	981 ✓	-	-	

Wallboard: Great for CSRs and Call center users. Has clearly defined information board about status of queue(s).

Calls Waiting		members		Past Calls			
WAITING	MAX WAIT TIME	LOGGED IN	BUSY	TAKEN	MISSED	ABANDONED	AVERAGE WAIT TIME
0	-	2 / 4	0	8	10	6	0:16

You also have the ability to set a "Waiting Time Threshold". Similar to **Queue Calls Waiting** widget, you can get a notification from the Wallboard that a caller has been waiting a certain amount of time

Quick Dial: Contacts / Rapid Dials

Add / edit a list of contacts (custom or same layout as your desk phone's Rapid Dials) for expedited options during/making a call.

- See coworkers' status
- Dial contact
- Transfer to contact (during a call)
- Dial coworker's voicemail

Training Phones			
MEMBERS			
CCi Training 2 982			
CCi Training 3 983			
CCi Training 4 984			
CCi Training 5 986			
CCi Training 6 989			

Conference Room

Once you have created your own **MeetMe Conference Room** Number (via User Portal) you can now monitor and control your own Conferences directly through the **Switchboard**!

When you want to start a conference, press "Join" next to your **Conference Room** Number you created in your User Portal.

Conference Room

34045

Duration: 00:00:00
Users: 0

The device you have paired with your **Switchboard** will then start the conference call.

- Mute All
- End Whole Conference

All callers in your current **Conference Room**

Conference Room		
34045	Duration: 0:45 Users: 4	MUTE OTHERS END CONF
MEMBERS	TIME	CONTROLS
CCi Training 1 981	0:42	
CCi Training 2 982	0:17	
CCi Training 3 983	0:33	
CCi Training 4 984	0:24	

Mute/Kick
Individual callers

Switchboard Call Control:

Once you have created your own Switchvox **Switchboard** Layout and saved it, you can now utilize all the **Call Control** advantages it has. Handle ALL phone operations such as:

Incoming Calls – Warm/Cold Transfers - Parked Calls – Voicemails - Status

The screenshot displays the Switchboard interface with four main panels:

- My Calls:** Shows a call from 'CCi Training 2' (982) with a duration of 0:05. Below the call information are buttons for HOLD, TRANSFER, PARK, RECORD, and END.
- Training Phones:** A table listing members and their status. The table has columns for MEMBER, CALLER, and DURATION.
- Call Logs:** A list of recent calls with columns for CALLER, TIME, and DURATION.
- Training Studio:** A table showing training sessions with columns for MEMBER, CALLER, and DURATION.

MEMBERS	CALLER	DURATION
CCi Training 2 982		
CCi Training 3 983		
CCi Training 4 984		
CCi Training 5 986		

CALLER	TIME	DURATION
CCi Training 2 982	11/18/22, 12:56 PM	0:12
CCi Training 4 984	11/18/22, 12:55 PM	0:04
CCi Training 3 983	11/18/22, 12:55 PM	0:02
CCi Training 2		0:02

MEMBER	CALLER	DURATION
CCi Training 1 981	CCi Training 2 982	0:05
CCi Training 2 982		0:05
CCi Training 3 983		-
CCi Training 4 984		-
CCi Training 5 986		-
CCi Training 6 989		-

Incoming Calls

When you are receiving an incoming call on your device (Desk Phone, Mobile App, Desktop App) the **My Calls** Widget displays the caller's ID and some options.

You will still need to answer the call with either the Desk Phone's handset, headset, speaker, or the Mobile/Desktop Apps. (Depending on what you have paired with **Switchboard**)

If you choose not to answer call, **Switchboard** allows you to:

The diagram illustrates the 'My Calls' widget with three call control options highlighted by callouts:

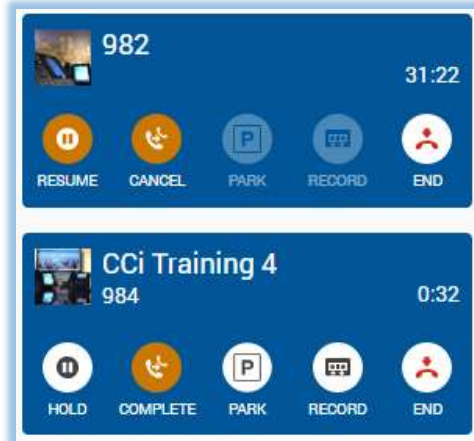
- Transfer call to another extension.** (Points to the TRANSFER button)
- Send caller directly to your Voicemail.** (Points to the VOICEMAIL button)
- Ignore Call (Stops ringing at your desk, keeps ringing for caller until they go to voicemail)** (Points to the IGNORE CALL button)

The 'My Calls' widget shows a call from 'CCi Training 2' (982) with a duration of 0:02. Below the call information are buttons for TRANSFER, VOICEMAIL, and IGNORE CALL.

Transfers

Perform **Cold** “Blind”, **Warm** “Assisted” Transfers, and Transfer to Voicemail with the Switchboard!

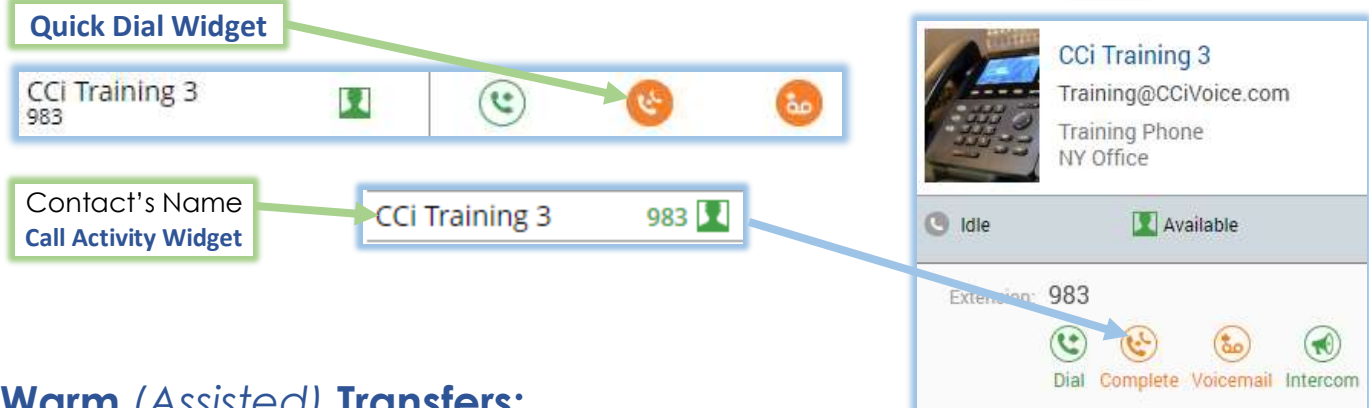
While on a call, click  to start the Transfer process.



Cold (Blind) Transfers:

After clicking the **Transfer** button, choose a Contact from your **Contacts Window** (on right side of Switchboard), **Quick Dials** Widget, or click on the Contacts name in their **Call Activity** Widget!

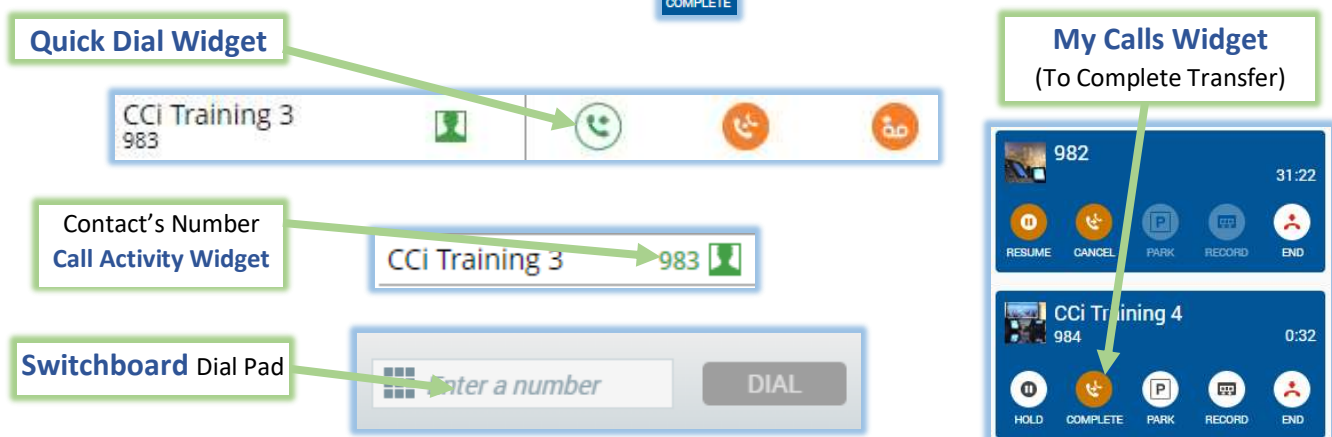
After you choose who you would like to “Cold” transfer to, click the  icon to send the caller to that contact's extension.



Warm (Assisted) Transfers:

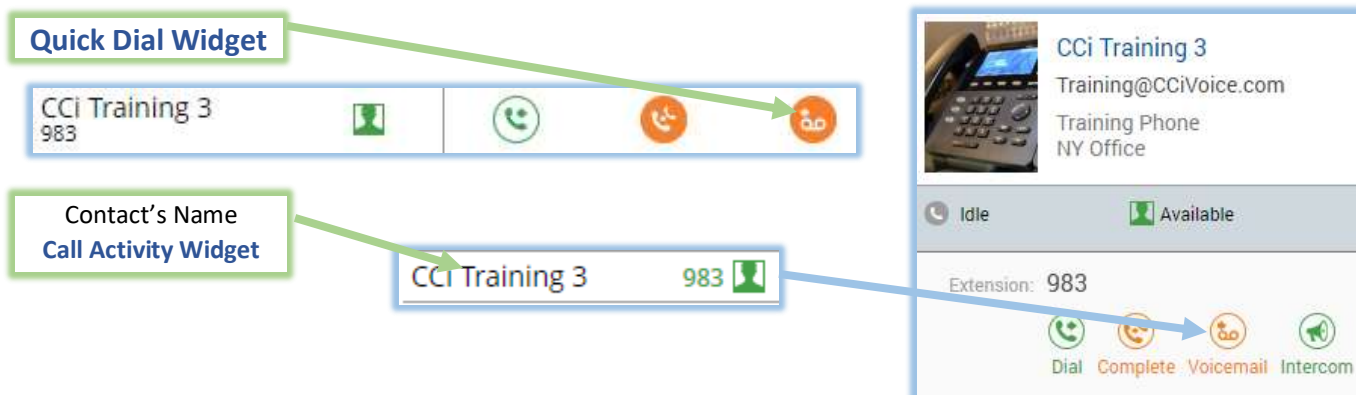
After clicking the **Transfer** button, choose a Contact from your **Contacts Window** (on right side of Switchboard), **Quick Dials** Widget, the Contacts number in their **Call Activity** Widget, or dial their number directly from the **Dial Pad**!

After you choose the contact you would like to “Warm” transfer to, click the  icon to call that contact. This places the caller on hold. Once you reach that contact/coworker answers, you then click the  icon to complete the transfer



Transfer to Voicemail:

After clicking the **Transfer** button, choose a Contact from your **Contacts Window** (on right side of Switchboard), **Quick Dials** Widget, the Contact's name in their **Call Activity** Widget

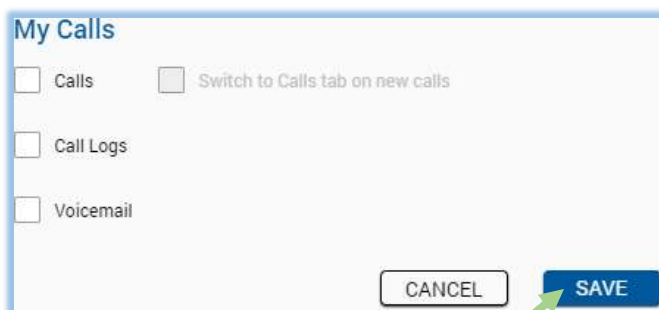


Call Log & Voicemail

Keep track of your *Dialed, Received, and Missed Calls* with the **Call Log**.

Stay on top of your **Voicemails** in a quick and efficient way!

When adding the **My Calls** widget, you can also have the **Voicemail** and **Call Log** as separate widgets.

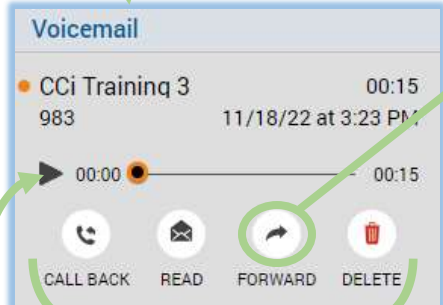


Add both or one individually and click **save** to make it's own separate widget.

Voicemail Widget:

Visual voicemail. See contact's information, play, delete, forward message to coworkers. Call contact back, etc.

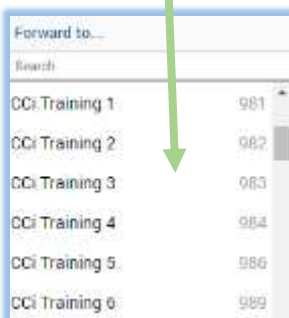
Click to open VM Options



Plays **VM** on computer audio.

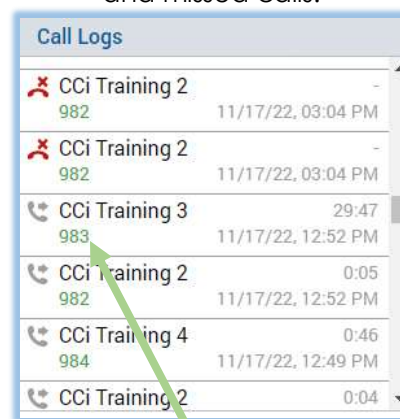
VM Options.

Choose Extension to forward voicemail to.



Call Log Widget:

See log of your dialed, received, and missed calls.



Click on contact's number to call them.