

Switchvox® User Portal Guide

A web-based dashboard that lets individual phone extension users manage personal communication settings, check voicemails, and configure call rules.

Access your **User Portal** →

https:// _____



Switchvox®

Extension

Password

Sign in

Log in with your:
Extension Number
 &
 Portal Password:
Changeme12#
 (default/case sensitive)

Once logged into your **Switchvox User Portal** you will see a **menu** on top of the home screen.



Open web-based version of
Sangoma Phone for Desktop App.
 (Needs to be installed on device before
 use)



Log out of Switchvox

Change Your **Status**

Access Switchvox **Switchboard**

Features

Features Tab:

Call Rules: Control what happens to your incoming calls. (See *Call Rules User Guide*)

My External Contacts: Create and maintain **External Contacts** for personal use. These cannot be seen by other phone-users. By default, all internal contacts (*coworkers*) will be programmed in your phone. You will need to add any external contacts with this feature.

Additional Phones: Users can have up to (6) devices tied to their extension. Each of the devices has a label, so that it can be identified in your Call Rules. Each device has a TRANSFER KEY #. This allows users to “hand off” calls from one device to another. *(By pressing “**” then the Transfer Key #)*

Conference Room: This section lets you set up your own conference room. Ask your *Switchvox Administrator* for the main conference room extension number. When a caller dials that number, they can access your conference room by dialing your conference room number, then the pound key (#).

Phone Features:

(4 tabs)



Phone Settings: - **Personalize your Phone:** Adjust brightness - Change Ringtone - Phone Background Image - Visual Voicemail, etc.

Ringtone: - **Choose Your Ringtone** from default list or upload your OWN ringtone with downloaded **.wav** file.

Ring Rules: - Different Ringtone for different Contacts - Auto Answer features.

Rapid Dial Favorites: - **Choose items for one-touch dialing.** - Switchvox Extensions - External Contacts. *(You can use your own)* - Status Indicators, which indicate your queue login status, or that there is a Parked call waiting. *(See Contacts/Rapid Dials User Guide)*

Time Frames: Switchvox can operate differently based on the date, day, and time. A *time frame* is considered valid when the current date and time match any one of the Time Frame’s conditions. Not all the rules must be matched. *(See Time Frames User Guide)*

Status Options: Your Personal *Status Options* are created under one of the main Status types: **Available**, **Away**, **Prefer Chat**, **Extended Away**, or **Do Not Disturb**. You can create new statuses that you can apply specific Call/Greeting Rules to.

My Account: Enter/edit basic information about your **Switchvox** account. Voicemail PIN, User Portal Password, Your Position at Business, Location, Profile Picture, etc.

Additional Numbers: Numbers added here are shown in your co-workers’ contacts. Ex: Home phone # or personal cell #.

Voicemail / Fax

Voicemail/Fax Tab:

Mailbox: Manage your Voicemails directly from your **Switchvox User Portal**. *Play, delete, move to another folder, forward to another extension, mark as read, mark unread. Etc.*

Voicemail Options:

(5 Tabs)



Recordings: – Record your greeting: Greetings in your own voice that can be played when a caller reaches your voicemail. Your Full Name (*spoken in your own voice*), which is used in the company directory, and as your voicemail greeting if you have not created and specified a recorded greeting. Recordings can be uploaded from your computer (.wav) or recorded over your phone. (See *Voicemail Options Guide*)

Greeting Rules: – Determine which recorded greeting plays when someone reaches your voicemail
(See *Voicemail Options Guide*)

Voicemail Notifications: – Emailed Voicemails: Customize how you want to receive a notification when you get a voicemail message in Switchvox. By Default, Voicemails get emailed with a .wav file of recorded voicemail.

Notification Templates: – Customize how you want to receive a notification when you get a voicemail message in Switchvox.

Forwarding: – Forwarding Voicemails: You can automatically forward all of this extension’s voicemail messages to other extensions in Switchvox. This is helpful for generic extensions such as ‘Accounting,’ or ‘Shipping,’ or for queue extensions such as ‘Customer Service.’ Callers can leave a message on one extension, then the message is forwarded to the appropriate people. This is also useful internally, if you want to send a message to everyone in a group.

Fax Options: Set up your faxing environment. You can enter multiple email addresses to receive notifications of a new incoming fax, create a fax header, and define this extension as only sending faxes.
(See *E- Fax Corporate User Guide*)

Reporting

Reporting Tab:

Call Logs: A simple list of the calls that have been made to or by your extension. You can select a date range by setting the **From** and **To** dates. Click **View Log** to see the log within the browser window or click **Output to .xls file** to download an Excel spreadsheet.

*Example of a **Call Log:**

Date ▼	From	To	Type	Call Time	Talk Time	Actions
6/15/2026 12:34 PM	CCi Training 1 <981>	8004444444	outgoing	1m, 57s	1m, 55s	

To see all details of the call, from the moment the number was dialed, to the moment a caller hangs up, click on the  icon on far right of **Call Log**.

Call Reports: This lets you generate a report about call activity. Call reports are generated for the date-range and criteria that you specify and include the fields that you specify. Reports can be shown in a chart, viewed as a list on the browser page, or downloaded as .xls. (*Excel spreadsheet*)
(See *Reporting Guide* for details on type of reports that can be processed_

Switchvox is a very “user friendly” system. If you ever need additional information about a specific feature, click on the “?” icon located on every page!

