



---

# Switchvox 4.5

## Extension Owner User Guide

---



Switchvox®

## Switchvox User Manual

601-00014-A  
January 25, 2010

# Getting Started

Welcome to Switchvox, the world's most powerful, yet easy to configure IP-PBX. This document describes how to use the Web-based Switchvox User Tool Suite.

Throughout this document, we refer to the User Suite menu options as a path, using '>'. Instead of saying "select the Modify Account option from the Settings menu in the navigation bar, we say "select **Settings > Modify Account.**"

**IMPORTANT:** You may find some features described in this document that are not available to you. This is determined by the version of Switchvox you are using, and what features your Switchvox administrator has given you permission to use. Please contact your administrator if you have any questions.

## What is New in Version 4.5?

Version 4.5 offers great new features for your phone, additional profile information with a picture, and a language setting.

### Phone Feature Packs: Ringtones, Tools, and Display Options

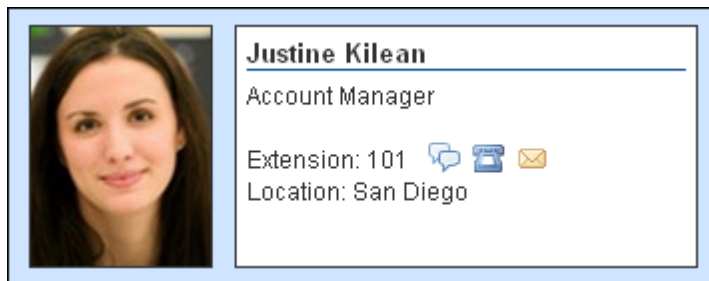
The following features come with a Phone Feature Pack:

- Upload Distinctive Ringtones to Switchvox
- Use Ringtones and other options to identify different types of incoming calls
- Define several items on your phone's display
- Access Switchvox tools right from your phone  
Directory, Voicemail Mailbox, Parking Lots, Phonebooks, and Record Call.



For details, see [Phone Features](#).

### Profiles



An Extension Profile includes some or all of the following:

- Image
- First and Last Name
- Title
- Location
- Extension Number

Profiles can be shown in the Switchboard and on a phone that uses a Phone Feature Pack. For details, see [Your Phone Feature Pack](#).

## Language Setting

You can select a language preference for the User Suite, which will also set your Sound preference. For details, see [Language Setting](#).

# About the User Suite

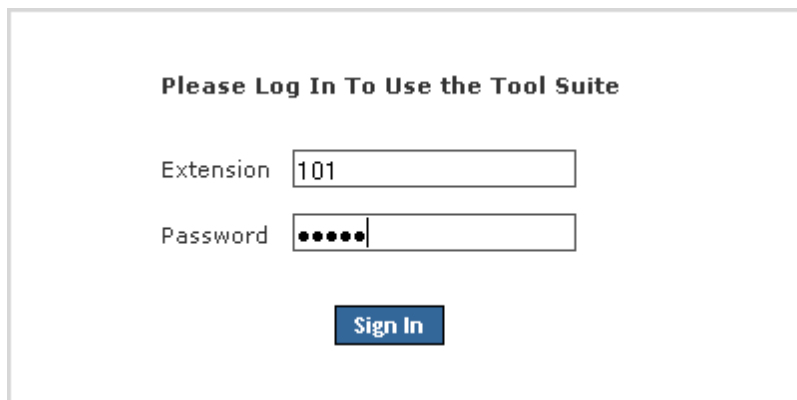
Each user has a Switchvox account that is his or her phone extension, and a password for that account. Ask your Switchvox administrator for your extension number and password, and for the URL of your Switchvox User Tool Suite (the User Suite).

## Logging Into the User Suite

On a computer that is on the same network as Switchvox, open a Web browser and enter the URL of the User Suite:

`https://YourServerIPAddress/main`

The Login page is displayed.



**Please Log In To Use the Tool Suite**

Extension

Password

**Sign In**

Enter your extension and password (provided by your administrator). Once you are logged in, you may have to change your password. If you do, the strength of your new password is indicated, to help you create a good password. The next time you go to the User Suite, log in using your new password.

To log out of the User Suite, click **Logout** (located in the upper right-hand corner).

## User Suite Navigation

The User Suite navigation bar contains the following dropdown menus:

### [Settings](#)

Set up your account, specify how you want to handle calls, manage your Phonebooks, and set up your own conference room.

### [Voicemail / Fax](#)

Manage incoming and outgoing voicemail and faxes, set up voicemail greetings, and customize email notifications for voicemail.

#### [Call History](#)

See logs of all calls to and from your extension and run usage reports.

## Getting Help

Click any help link to open a pop-up window with information about a particular tool. Help links are available as question-mark icons and as text links.



[How do I use this page?](#)

If a pop-up window does not display, set your Web browser to allow pop-ups from the domain of your Switchvox server.

# Settings

The Settings area is where you set up your account, specify how you want to handle calls, manage your Phonebooks, and set up your own conference room.

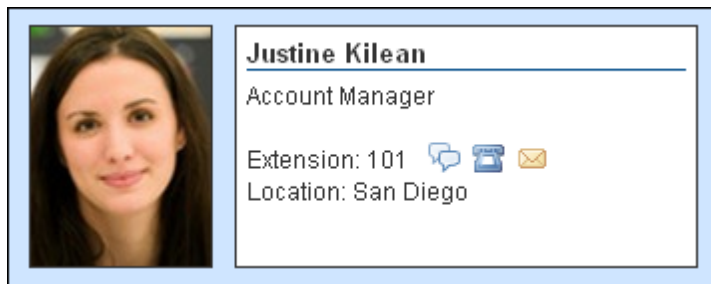
## Modify Account

This section lists basic information about your Switchvox account.

Your administrator may have given you permission to change this information. If you do make changes, click **Modify Extension** to save those changes. The page is refreshed, and a message indicates that your changes were successfully saved.

If you are changing your password, the strength of your new password is indicated as you type, to help you create a good password. The next time you go to the User Suite, log in using your new password.

## Your Profile



An Extension Profile includes some or all of the following:

- Image
- First and Last Name
- Title
- Location
- Extension Number

Profiles can be shown in the Switchboard and on a phone that uses a Phone Feature Pack. For details, see [Your Phone Feature Pack](#).

## Profile Picture

To add a picture:

1. Click **Add an image**.
2. Click **Browse**, and then find the image file on your computer.  
Images must be at least 75x100 pixels, and must be in jpg format.
3. Click **Upload**.  
The image is uploaded and displayed with the crop area that will be used to make a 75x100 image. You

can move the crop area around to choose the best portion of the picture. The Preview on the right shows you what the picture will look like once it is cropped.






4. Click **Save Image**.
5. Click **Save Extension Settings**.

To upload a different picture, re-crop the existing picture, or delete the existing picture:

1. Click **View Image**.
2. Click **ReCrop**, or **Delete**.  
If you want to upload a different image, **Delete** this image now, and then click **Add an image** to start again.
3. Confirm your changes.
4. Click **Save Extension Settings**.

## Language Setting

The Switchvox web-based tool suite is available in several languages:

-  English for United States
-  English for United Kingdom
-  Spanish for Spain
-  Spanish for Mexico
-  Italian

To set your preferred language:

1. Select a language from the dropdown.
2. Select a locale for that language.

If you choose to use a language other than English for US, there are some important issues to be aware of:

- **Dates**  
All other languages and locales handle dates with the format of day, then month, then year (as opposed to mm/dd/yyyy).
- **Sound Packs**  
There are Sound Packs available for each Language preference. Once you select a language, Switchvox serves you the sounds from that language's soundpack. For example, if you switch to the Italian language, and then you call the voicemail access extension, the prompts will be in Italian. Soundpacks must be installed by the Switchvox administrator (see the Admin Suite [Digium Addon Products](#)).

## Call Rules

Call Rules control how your calls are handled. Here are some examples:

- When I'm on the phone, go straight to voicemail
- If I don't answer, 'cascade' calls to my mobile phone then my home phone

- Forward all my calls to another extension
- On weekends and evenings, forward all my calls to another extension
- Hang up on calls from a certain phone number

Settings	Voicemail / Fax	Call History
<h2>Call Rules</h2> <div> <div>1</div> <div>Call Rule Sets ?</div> </div>		
<h3>Unanswered Call Rule Sets</h3> <div>Add New Rule Set</div> <div># Rule Set Information</div> <div> <b>Name:</b> Forward to my mobile <b>Time Frame:</b> Outside Business Hours         </div> <div>           1. <b>Cascade</b> direct calls to 916195551234 immediately and attempt to preserve caller id.            2. Send direct calls <b>to voicemail</b> after 4 rings.         </div>		
<h3>Busy Call Rule Sets</h3> <div>Add New Busy Rule Set</div> <div>-OR-</div> <div> <input checked="" type="checkbox"/> Use my unanswered call rule sets <div>Save</div> </div> <div>You currently do not have any rule sets defined in this section.</div>		
<div> <div>2</div> <div>Call Blocking ?</div> </div>		
<div>Add Call Block Rule</div> <div># Move Unanswered Call Rule Sets</div> <div> <div>1</div> <div> <div>↕</div> <div>Block</div> <div>Phone Number ▼</div> <div>918585551234</div> <div>And Then</div> <div>Send to Voicemail ▼</div> </div> <div>when time is</div> <div>Always ▼</div> </div>		
<div> <div>3</div> <div>Messages/Prompts</div> </div>		
<div> <div>Secret Code</div> <div>"Please enter your password followed by the pound key."</div> <div></div> </div>		
<div> <div>Secret Code</div> <div>"Password incorrect. Please enter your password followed by the pound key."</div> <div></div> </div>		



# Call Rule Sets

**Unanswered Call Rule Sets** specify how a call is handled after a certain number of rings. **Busy Call Rule Sets** specify how a call is handled when your line is busy. You can set up different rules for those situations, or use the same rules.

When a call is unanswered or your line is busy, Switchvox evaluates each of your Call Rules in the order listed. The first set is evaluated in order, then the second set, and so on. That means that the 'During Business Hours' rule that forwards a call to your mobile phone must come before the 'Anytime' rule that sends a call straight to your voicemail.

It's a good idea to test your rules by calling your extension from another phone.

## Creating a New Call Rule Set

To create a new Call Rule Set under **Unanswered** or **Busy**, click the appropriate **New Rule Set** button. To create a new Busy Call Rule Set, you must first un-check the box **Use my unanswered call rule sets**. That makes the **Add New Busy Rule Set** button active (it turns blue), so you can click it and create a new rule set.

When the settings are correct, click on **Save Ruleset Settings** to create the new rule set and add its rules.

1. Select the type of rule to add from the dropdown
2. Click **Add Rule**.
3. Specify whether the rule applies to *direct calls*, *queue calls*, or *all calls*.
4. Depending on the type of rule you are adding, enter the appropriate extensions or phone numbers.
5. If you are adding a Secret Code rule, enter 1 to 10 digits.
6. If you are creating an Unanswered rule, specify the number of times to ring your phone before following this rule.

1

Rule Set Rules?

Send To Voicemail

Add Rule

# Move Call Rules

1

Cascade

direct calls

to

916195551234

after

Immediately

☒ Attempt to preserve caller id.

2

Send

direct calls

to voicemail

after

4 rings

2

Rule Set Settings

Rule Set Name

Forward to my mobile

Example: On Vacation

Rule Set Time Frame

Outside Business Hours

When is this rule set used?

Modify Ruleset Settings

### Rule Set Name

Enter a unique name for this rule set.

### Rule Set Time Frame

Select a time frame from the dropdown. Switchvox evaluates the current date and time against this time frame, and if they match then the rule is followed. If they do not match, Switchvox moves on to the next rule. See [Time Frames](#) for more information.

### Send to Voicemail

This rule sends a call to your voicemail so the caller can leave a message.

### Call Forward

This rule forwards a call to another Switchvox extension. The extension can be another phone, a call queue, or any other type of extension. Once a call is forwarded to the extension, the call rules for that extension are followed.

### Call Cascade

This rule rings another extension or an external phone number (i.e., your mobile phone), and if the call isn't answered then it is passed on to the next rule in the set. This action depends on your Outgoing Call Provider, but if your provider supports it, you can stack several rules that try and reach you at several phone numbers.

**Note:** If you are cascading a call to an external phone number, be sure to add a '9' or other necessary digits that you normally use to dial out.

### Secret Code

This rule prompts the caller to enter a secret code, then passes the caller to the next rule in the set. If the caller cannot enter the correct secret code after the specified number of tries, then you can specify what to do with the call.

### Ring All

This rule simultaneously rings up to 3 extensions or external phone numbers. **Note:** If you are ringing an external phone number, be sure to add a '9' or other necessary digits that you normally use to dial out.

## Managing Call Rule Sets

If you have multiple Rule Sets, you can drag and drop them to prioritize them appropriately, or you can delete them and replace them with new rules. Your rules need to be put in order because they are executed from top to bottom.

You can have different rule sets for different times, and activate or deactivate them as you see fit. In order to activate a rule set, click on the Activate button to the right of the rule, and fill in the time you want the rule to occur. The active rule set will be highlighted yellow and will display how long it will be active on the right side. This process is the same for Unanswered or Busy Call Rule Sets.

## Call Blocking

Switchvox lets you specify phone numbers that you do not want to accept calls from. You can block specific phone numbers, or any numbers that begin with the same prefix, and you can block them at all times or during specified time frames. You can also choose how Switchvox handles the blocked calls.

Click **Add Call Block Rule** and a new blank rule section appears. Select *Phone Number* or *Prefix* from the dropdown, then enter the number. Be careful entering a prefix; if you put in the wrong prefix you might end up blocking more calls than you expected. Select the action Switchvox should take with the blocked call, then select a Time Frame if you want to control when these calls are blocked. Click **Save** to save your changes to the Call Block Rule.

## Messages/Prompts

If you use the *Secret Code* feature in a Call Rule, the default sound prompts are provided here. You can change the prompts by recording your own sound over your phone, or uploading a new sound file.

To add or change your own sound, click the prompt's **New** button. To play the sound, click the prompt's **Play** button. To remove a sound that you created, and go back to the default sound, click the prompt's **Use Default** button.

## Time Frames

Switchvox can operate differently based on the date, day, and time. You can set up your Call Rules to check for a Time Frame, and then act accordingly.

Your Switchvox administrator maintains a set of default time frames that you can use, or you can create, edit, and delete your own time frames.

A time frame is considered valid when the current date and time match any one of a Time Frame's rules. Not all of the rules have to match.


Settings

Voicemail / Fax

Call History

### Time Frames

#### Create A New Time Frame


 What are Time Frames for?

Time Frame Name  Create New

#### Modify Your Time Frames

WeeklyMeeting Edit Delete

#### View Default Time Frames

 What are default Time Frames?

During Business Hours View

Outside Business Hours View

Weekends Only View

## Creating a New Time Frame

To create a new time frame, enter a unique name and click **Create New**. Enter any appropriate Start and End Dates, Start and End Days, and Start and End times, then click **Add**.

Continue adding rules until you have completed the Time Frame definition.

The following are sample time frame definitions:

Start Date	End Date	Start Day	End Day	Start Time	End Time
-	-	Monday	Monday	-	-
-	-	Wednesday	Wednesday	-	-

**Mondays 12:01AM to 12:00PM, and Wednesdays 12:01AM to 12:00PM**

Start Date	End Date	Start Day	End Day	Start Time	End Time
-	-	-	-	3:00 AM	6:00 AM

**Early Morning**

Start Date	End Date	Start Day	End Day	Start Time	End Time
07/01/2009	07/07/2009	-	-	-	-

### The First Week in July 2009

Start Date	End Date	Start Day	End Day	Start Time	End Time
01/21/2009	-	-	-	-	-


After January 21, 2009



Start Date	End Date	Start Day	End Day	Start Time	End Time
02/01/2009	02/28/2009	Monday	Friday	6:00 AM	7:00 AM

Weekdays in February, 2009 between 6:00 and 7:00 in the morning

## Editing a Time Frame

To change a time frame, click its **Edit** button. This displays the Manage This Time Frame page. Create a new rule, or multiple rules, and delete any rules that you do not want to include in this time frame. (You cannot edit a rule.)

**Manage this Time Frame**  
 [How does this work?](#)

Start Date	End Date	Start Day	End Day	Start Time	End Time
-	-	Monday	Friday	9:00 am	5:00 pm
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Midnight = 12:00 AM  
Noon = 12:00 PM

## Deleting a Time Frame

To delete a time frame, click its **Delete** button. Be sure that you do indeed want to delete this time frame, then click **Yes, Delete Time Frame**. The Time Frames main page is deleted with a message that the time frame was deleted.

Before you delete a Time Frame, be sure you do not have any IVR Menus or Call Rules that depend on it.

# Phonebooks

Your Switchvox Phonebooks let you organize your contacts so that you can easily access them from your Switchboard. Phonebooks can include your fellow Switchvox users, and external contacts.


**Settings**Voicemail / FaxCall History

**Phonebooks**

**Add Phonebook Entries** ?


Entry Type: System Extension ▼

Phonebook: Default ▼

Extension(s):  













Permission Type: ? ☒ Normal ☐ Extended

**Add to Phonebook**

 **Phone Provisioning Options** ?

**Default** *New Phonebook*

Your Default Phonebook ( 1 to 12 ) of 12

# ▼	Move	Number	Name	Type	Additional Numbers
<b>Extended Permission Entries</b>					
1		102	Jane Doeson	SIP Extension	<b>Show</b>
2		103	John Smith	SIP Extension	<b>Show</b>
3		104	Gilbert Brown	SIP Extension	<b>Show</b>
5		106	Spencer Flemming	SIP Extension	<b>Show</b>
8		109	Posey Podolsky	SIP Extension	<b>Show</b>
9		110	Ortiz Schuster	SIP Extension	<b>Show</b>
12		113	Morris Madsen	SIP Extension	<b>Show</b>
13		114	Moon Bradley	SIP Extension	<b>Show</b>
18		119	Windham Stephens	SIP Extension	<b>Show</b>
<b>Normal Permission Entries</b>					
21		611	Customer Service	Call Queue	<b>Show</b>
22		612	Technical Support	Call Queue	<b>Show</b>
25		899	Voicemail	Voicemail	<b>Show</b>

# Adding Phonebook Entries

There are different types of Phonebook entries, depending on whether the entry is known within Switchvox, or is an external phone number.

## System Extension Entries

System Extension Entries are other Switchvox extensions. You can add user-type extensions, and other types of extensions such as queues or IVRs.

### Phonebook

Select the Phonebook this entry belongs in. To create a new Phonebook, use the **New Phonebook** tab.

### Extension(s)

Enter at least one extension here. To enter multiple extensions, put a comma (,) after each extension. Click the people icon to see a directory of your Switchvox extensions. Hold down *Ctrl* to select many extensions, or hold down *Shift* to select a block of extensions.

### Permission Type

*Normal:* Shows the user's Presence, and whether or not he or she is on the phone. Also includes a dropdown that lets you open a chat, call additional numbers, or Intercom the person.

*Extended:* Shows the Normal features, plus the caller ID name and number of the user's active calls. It also includes options to monitor, record, whisper, barge into, or pick up the user's calls.

Only phone-type extensions can be Extended Permission entries. If you try to add any other type of extension (e.g., a Call Queue), it is added as a Normal entry.

You can change an entry's permission type at any time.

If you cannot see or use an option in an Extended Entry, your Switchvox administrator has not given you permission to do so.

## External Number Entries

External Number Entries are for names and phone numbers other than Switchvox extensions. Once you add an external entry, you will also be able to put [Additional Numbers](#) into that entry.

Make sure to enter external phone numbers as you would dial them from your phone. For example, if you must dial 9 to get an external line, this entry must begin with a 9.

### Phonebook

Select the Phonebook this entry belongs in. To create a new Phonebook, use the **New Phonebook** tab.

### Number

Enter the phone number.

### Name

Enter a name.

### Jabber ID

Enter this person's Jabber ID to display his Jabber presence on your Switchboard in his Phonebook entry.

The Jabber ID has a user ID (the extension) and a Jabber Hostname. For example,  
**101@jabber.peeredswitchvox.com.**

## Status Indicator Entries

These entries are only available for Polycom and snom phones that Switchvox has configured in the **Phone Setup** tool. If you don't see this type of entry, check with your Switchvox administrator.

A Status Indicator entry controls a line status indicator light on your phone.

### Phonebook

Select the Phonebook this entry belongs in. To create a new Phonebook, use the **New Phonebook** tab.

**IMPORTANT:** This must be the same Phonebook as the one in the [Phone Features Options](#) for this entry to affect your phone. Also, it must be one of the first entries in the Phonebook if you want it to display without having to scroll through the entries on your phone.

### Entry Name

Enter a name for this entry. This isn't required, as you don't see the entry in your Switchboard.

### Monitor Type

*Parking Lot:* This lights up the line status indicator on your phone when a caller is waiting in the specified **Parking Lot Extension**.

*Queue Login Status:* This lights up the line status indicator on your phone when you are logged into the specified queue. Enter the **Agent Login Extension** that you use to log into this queue, and the queue that you want to monitor.

## Switchvox-Peer Entries

If your Switchvox is peered with another Switchvox, you can include the peered Switchvox extensions in your Phonebook.

For peered extensions, use the **External Number** entry type (because this extension is not on your Switchvox).

### Phonebook

Select the Phonebook this entry belongs in. To create a new Phonebook, use the **New Phonebook** tab.

### Number

Enter the extension number from the peered Switchvox, just as you would dial it on your phone. Peered extensions might start with a different number than yours, or have more digits.

### Name

Enter a name for this entry.

### Jabber ID

Enter this person's Jabber ID to display his Jabber presence on your Switchboard in his Phonebook entry.

The Jabber ID has a user ID (the extension) and a Jabber Hostname. For example, **101@jabber.peeredswitchvox.com**.

## Managing Phonebooks

To create a new Phonebook, click the **New Phonebook** tab. Enter a unique name for this Phonebook, and click **Create New Phonebook**. This Phonebook is created and is now available in the Phonebook dropdown when you create a new entry.

To move an entry back and forth as a Normal or Extended entry, drag the entry's green arrow icon.



To delete an entry, click its **Delete** button. Be sure that you do indeed want to delete this entry, then click **Yes, Delete**. The Phonebook is refreshed, and this entry is gone.

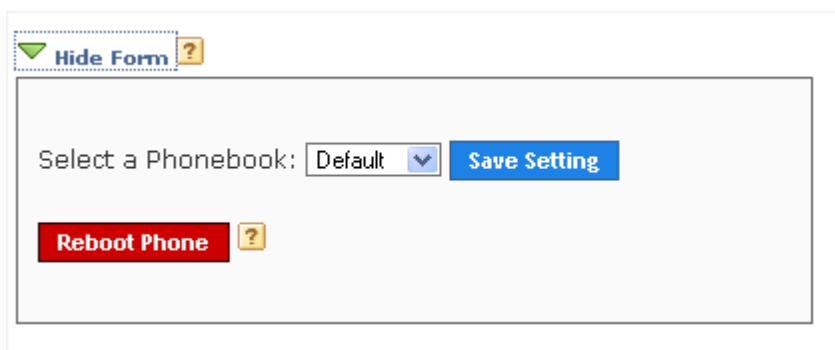
To delete a Phonebook, click its **X** icon. Be sure that you do indeed want to delete the Phonebook, then click **Yes, Delete**.

## Phone Features Options

The **Phone Features Options** let you specify a Phonebook to push out to your phone. Your phone must have a Phone Feature Pack, otherwise these settings are not available. For details, see [Your Phone Feature Pack](#).

When you make changes to a Phonebook, or you want to change the Phonebook that is already on your phone, click **Reboot Phone** to send the correct Phonebook out to your phone. Rebooting your phone takes a few minutes, and you will not be able to make or receive calls while it is rebooting.

**Note:** If the phone is not on the same network as Switchvox, the phone might not be rebooted. In that case, you must reboot the phone manually.



## Additional Numbers

Each Phonebook entry is based on one main extension or phone number, but it can also have additional numbers associated with it. This way, you can have one Phonebook entry for a person, and have all of their contact numbers included in that entry. The Additional Numbers are available via a dropdown (the blue plus sign) in the Switchboard Phonebook entry.

To see and modify Additional Numbers for an entry, click the entry's **Show** button.

2

104

Gilbert Brown

SIP Extension

Hide

Additional Numbers:

Move	Icon	Title	Number	Edit	Delete	Hide	Copy
		Mobile	5552223456			<input type="checkbox"/>	
Add A Number							










Additional Numbers can be entered by an extension owner, or you can enter them in your Phonebook entry.

Additional Numbers entered by an extension owner are available when you add the extension to your Phonebook. These numbers appear as locked and cannot be edited, but you can choose to hide them in the Switchboard.

Additional numbers that you add to your Phonebook entry can be edited and deleted. You can also copy any Additional Numbers (including the owner's numbers), and then edit or delete the copy.

# Additional Info

Your account and profile include Additional information that is used to help others in your organization find you when you are away from your desk. For example, you can add your mobile phone number, your home phone number, or even another extension that you use frequently. Numbers added here are shown in your co-workers' Phonebook entries.

Settings	Voicemail / Fax	Call History			
<b>Additional Info</b>					
<b>? Additional Numbers</b>					
Move	Icon	Title	Number	Edit	Delete
		Mobile	912225551234		
		Lab	523		
 <b>Add A Number</b>					

To create a new number, click **Add A Number**. You can set an icon, title, and a phone number or extension. The icon and title are displayed in your co-workers' Phonebook entries. To change the icon for an entry, click the icon.

**IMPORTANT:** Make sure to enter the number as you would dial it from your phone. For example, begin with a 9 if that's how you would normally dial that number.

Click the pencil icon to change a number, or the red X to delete a number. Drag the green arrows to change the order that your numbers are shown in.

## Conference Setup


This section lets you create your own conference room. Ask your Switchvox Administrator for the main conference room extension number. When a caller dials that number, he or she can access your conference room by dialing your conference room number.

## Conference Setup

1

## General Settings


 What is this for?

Your Conference Room Number:    
5 digits

☒ Play sound when people enter/leave

Sound type:  

☐ Play Music On Hold when only 1 member is in the conference

Conference members may press # and be sent to extension  

2

## Admin Settings

 Tell me more about admins

## All Available Accounts

103 "John Smith"  
104 "Gilbert Brown"  
105 "Agner Witt"  
106 "Spencer Flemming"  
107 "Newton Degenhardt"  
108 "Webster Savage"  
109 "Posey Podolsky"  
110 "Ortiz Schuster"  
111 "Harvey Culver"  
112 "Webb Sanderson"

## Conference Admins

101 "Justine Kilean"  
102 "Jane Doeson"

☐ Only allow conference admins to talk

☐ Hang up conference when all conference admins leave

☐ Users can not talk until a conference admin is in the conference room

**Save Conference Settings**

# General Settings

You can change the behavior of your conference room using several options.

## Your Conference Room Number

Enter a unique 5-digit number for your conference room. This is the number that you give to callers so they can access your conference room. Click the green arrow to have the system pick a random, unused room number for you.

## Play sound when people enter/leave

Check this box and select a sound to play to all members of the conference room when a new caller enters the room. There are three options for the sound type that is played when a caller enters and exits your conference room:

*Only Sound:* Only a sound is played, no information about the caller.

*Sound with Caller Name:* The caller is prompted to record his or her name. The recorded name is then played along with a sound.

*Sound with Caller Name (user review option):* This is the same as *Sound with Caller Name*, but it gives the caller an opportunity to listen to the recorded name, then accept or re-record it before joining the conference room.

## Play Music On Hold when only 1 member is in the conference room

Check the box if you want this to be true.

## Conference members may press # and be sent to extension ☐

Enter an extension here, so that when member hit the # key, they are transferred to that extension.

# Admin Settings

Admins are special members of a conference room who have additional privileges. Use the lists in this section to identify which extensions are treated as admins of your conference room, and set the options for your admins.

## Only allow conference admins to talk

Check this box to make all non-admin callers listen-only.

## Hang up conference when all conference admins leave

Check this box to ensure that your conference room is closed down after the conference is over.

## Users cannot talk until a conference admin is in the conference room

Check this box to keep callers mute until an admin is in the room. Callers can join the room, but they cannot speak to each other.

# Phone Features

Use the Phone Features page to customize the way your phone works. Your phone must have a Phone Feature Pack, otherwise these settings are not available. For details, see [Your Phone Feature Pack](#).

**IMPORTANT:** If you make changes to any of these settings, you must reboot your phone for the changes to take affect.



# Phone Options

Phone Options let you set up the behavior of your phone. Your phone must have a Phone Feature Pack, otherwise these settings are not available. For details, see [Your Phone Feature Pack](#).

## General Options

General options can be set for snom phones and Polycom phones.

### Line Label

This is the set of letters and/or numbers that are shown on the line for your extension. By default, this is your extension number.

### Auto-answer Switchboard initiated calls

This sets your phone to automatically answer Switchboard-initiated calls. If you click on a Switchboard phonebook entry, normally your phone rings and you have to pick it up, then Switchvox dials the number for that entry. If this box is checked, your phone rings and then automatically goes to Intercom mode and answers the Switchboard, and you hear the phone ringing for the call to your phonebook entry.

### Hide missed calls

This turns off the **missed calls** notification. You can turn this back on but you will have to restart your phone, so any calls you have missed in the meantime will be ignored, and you will not have a missed call notification after the phone is restarted.

## Polycom Options

Polycom Options are for Polycom phones only.

### Line keys per registration

This sets the number of buttoned-lines on your phone that are set to this extension. For example, if you have a 3-line phone, you can set all 3 lines to your extension. That way, you can have an active call and 2 calls on hold, and use the buttons to manage those calls.

Any line on the phone that is not used for your own extension will be automatically filled with your Phonebook entries. For details, see [Phone Features Options](#).

### Do not show caller profile on phone during incoming/outgoing calls

This turns off the Switchvox Profile feature. For details on profiles, see [Your Profile](#).

## Distinctive Ringtones

Switchvox can store and play distinctive ringtones that can be used on your Polycom phone. Your phone must have a Phone Feature Pack, otherwise these settings are not available. For details, see [Your Phone Feature Pack](#).

## Add a Ringtone

You can add as many ringtones to Switchvox as you want. However, each phone has two important limitations for supporting ringtones that do not come standard on the phone: Maximum disk-use of 300 kilobytes for all ringtones Maximum of 8 ringtones

### Add a Ringtone

Ringtone File (.WAV file):

Name:

To add a ringtone:

1. Click **Browse**, and find the file on your computer.
2. In the **Name** field, enter a name for this ringtone.
3. Click **Add Ringtone**.

The Distinctive Ringtones list is refreshed, with your new ringtone listed.

## Distinctive Ringtones List

This list shows the ringtones that you have uploaded to Switchvox, and the ringtones that come with a Polycom phone. (If you have added ringtones directly to your phone, those are not included in this list.) Depending on the permissions you have on each ringtone, you can do the following:

 **Play** the ringtone.

The audio file is downloaded to your computer, then played using your default audio player for .WAV files.

 **Edit** the ringtone.

You can upload a new file, or change the **Name**.

 **Delete** the ringtone.

You must verify that you want the ringtone deleted. If you delete a ringtone, every Ring-Rule that uses that ringtone is also deleted.

## Distinctive Ring Rules

These rules control what happens when you get an incoming call on your Polycom phone. Your phone must have a Phone Feature Pack, otherwise these settings are not available. For details, see [Your Phone Feature Pack](#).

Ring Rules define conditions for callers or kinds of calls, and then define what the phone does when those calls come in. Here are the actions the phone can take if a call meets your conditions:

- Ring with the specified ringtone
- Auto-answer in Intercom mode
- Ring and auto-answer
- Mute the ring (your line still blinks)

To add a new Ring Rule:

1. Enter a Rule Name.
2. Select the action your phone should take (Ring Type).


**Distinctive Ring Rules**

*(only available for Polycom phones)*

---

**Add a Ring Rule:**

Rule Name:

Ring Type:  

Ringtone:  



Using 8% of



0%

3. Select a Ringtone, if you have chosen a Ring action.

4. Click Add Ringtone Rule.

The new rule is created, with a link to **Modify Rule Conditions**.

5. Click **Modify Rule Conditions**.

The Rule Condition window is displayed.

6. Select a Call Type and set the **Conditions**

- Extension

If the incoming call is from any one of these extensions, the condition is met. This can be one or many extensions.

- Caller ID Number Range

If the incoming caller ID number is equal to one of these numbers, or it falls between them, the condition is met.

- Caller ID Number Pattern

If the incoming caller ID number matches this number pattern, the condition is met.

Use the asterisk (\*) to indicate that "any number matches." For example, **619555\*** matches every call with area code 619 and prefix 555.

- Caller ID Name Pattern

If the incoming caller ID name matches this text pattern, the condition is met.

Use the asterisk (\*) to indicate that "any letter matches." For example, \*Smith matches every call from a name that ends with Smith.

- Ring Hint

If the incoming call has this Ring Hint associated with it, the condition is met.

Ring Hints are created and managed by your Switchvox administrator. They can indicate almost anything, so check with your administrator before using this condition.

- Queue Calls

If the incoming call comes from any queue, the condition is met.

- Direct Calls

If the incoming call was made directly to your extension (or to a DID that is directly routed to your extension), the condition is met.

- Internal Calls

If the incoming call originated in Switchvox, the condition is met.

- External Calls

If the incoming call originated outside of Switchvox, the condition is met.

When you have created the conditions that you want, click **Close**.

7. Restart the phone.

Once you have set up Ring Rules and restarted your phone, your ringtone disk space usage is displayed. This is specific to your phone, and can help you decide which ringtones to use for your Ring Rules. You can add as many ringtones to Switchvox as you want. However, each phone has two important limitations for supporting ringtones that do not come standard on the phone: Maximum disk-use of 300 kilobytes for all ringtones  
Maximum of 8 ringtones

To change existing Ring Rules or Conditions:



Edit

Click the Edit button to change the details of a rule, or of one condition in a rule.



Save

Click the Save button to save the changes that you made.



Delete

Click the delete button to delete a Ring Rule, or to delete one condition in a rule.

## Your Phone Feature Pack

If your phone does not have a Phone Feature Pack, please see your Switchvox administrator.

A Switchvox Phone Feature Pack offers the following features:

- Customized phone displays

Customize some of the information displayed on your phone. See [Phone Options](#).

- Status Indicators

Set a line status indicator light on your phone. This can show whether a call is waiting in a parking lot, or whether you are logged into a queue. See [Status Indicator Entries](#).

- Distinctive Ringtones

Set the audio file of your choice to ring on incoming calls, depending on the caller. See [Distinctive Ring Rules](#).

- Auto-answer

Set an automatic answer in Intercom mode, depending on your caller. See [Distinctive Ring Rules](#).

- Combine Ringtones and Auto-answer

Combine a ringtone and auto-answer, depending on the caller. See [Distinctive Ring Rules](#).

- [Phone Applications](#)

Access many of the Switchvox features right from your phone.

◦



The Phone Features available on your phone will vary, depending on the type of phone you have.

- The **General Options** are available on snom and Polycom phones.
- The other features are only available on Polycom phones. If you have a newer Polycom phone with three or more lines (e.g., the VVX 1500 or SoundPoint 450, 550, 560, 650, or 670) you should be able to take full advantage of your Phone Feature Pack. Other Polycom phones may not offer all of the features.

## Phone Applications

To use the Switchvox Applications on your Polycom phone:

1. Press the **Applications** key on your phone.

If your phone does not have that key, press the **Services** key.

2. If necessary, log into **Applications** by entering your password.

You will need to log into the Applications area if you have logged out, or if your phone has been logged into a different extension.

Press the alpha/numeric soft key until it is set to numeric, then enter your password (the same numeric password that you use to log into the Switchvox User Suite and your Voicemail). When your password is correct, press the **Right Arrow** key to highlight **Login**, then press the **Select** key (this is probably a Checkmark on your phone).



3. Select the **Application** that you want to use.

Press the **Arrow** keys to move up and down in the list of Applications, and press the **Select** key for the Application that you want to use.

4. You can log out of Applications at any time. Use the **Arrow** keys to navigate to **Log Out**, then press **Select**.

**Note:** Depending on your phone, navigating with the arrow keys might work differently. Also, when you first press the **Applications** key on your phone, the display will show the last page that was available. For example, you might see the profile of your last incoming caller.

The following Switchvox Applications are available:



Directory Access

Access the Switchvox Directory right from your phone.



Parking Lots

View and pick up parked calls.



Phonebooks

Access your Switchvox Phonebooks from your phone.



Record Call

Record your active call. (Call recordings are found in your [Mailbox](#)).



Voicemail

View and listen to your Switchvox voicemail.



Log Out

Log out of these Switchvox Applications.

Within each Application, you can use your phone's soft keys.



#### Home

Return to the list of applications.

#### Exit

Exit Switchvox Applications and return to the default screen for your phone.

#### Refresh

Refresh the information on the screen. For example, you might press Refresh in Parking Lots, to see if a call was just parked.

#### Back

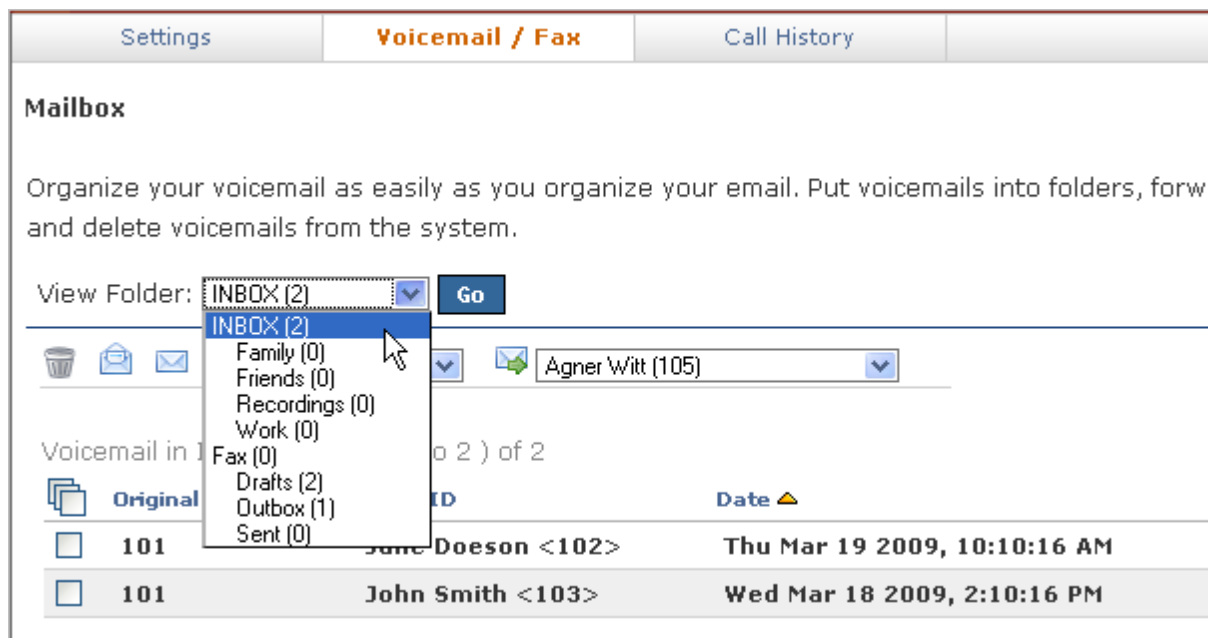
Go back to the previous screen that you used. For example, if you navigated through your Phonebooks to a Phonebook entry, Back would return you to the list of Phonebook entries.

# Voicemail / Fax

This area lets you set up your voicemail and fax options, and manage incoming and outgoing voicemail and faxes.

## Mailbox

Your Mailbox lets you manage your voicemail and faxes in Switchvox.



You can access your Mailbox here in the User Suite, or from your desktop email application. See [Putting the Mailbox on Your Desktop](#) for more information about using your desktop email application.

## Voicemail

Your voicemail comes into the INBOX folder. Each message displays the original mailbox the message was left in (the message might have been forwarded to you by a co-worker), the caller ID of the caller (if it was available), the date and time the message was left, and the duration of the message.

To play or download a message, click its **Play** button. This marks the message as **Read** (it is no longer shown as bold, and the message-waiting indicator light on your phone would go off if this was your only unread message).

To delete messages, or mark them as *read* or *unread*, check the box for each message that you want to affect. Then, click the appropriate icon (at the top of the list). If you delete messages, you are prompted to verify the action. Be sure that you do indeed want to delete the messages, then click **Yes, Delete**.

To move messages to a different folder, check the box for each message that you want to move, select the folder where the messages belong, then click **Move To Folder**.

To forward messages to another Switchvox user, check the box for each message that you want to forward, select the extension to forward them to, then click **Forward To**.

To sort by column in the message list, click the column name.

**Note:** You can also manage your voicemail from your phone by dialing the voicemail access extension (default is 899). Follow the prompts to give your password and check your messages. Or, your phone may have a **Messages** button that dials the voicemail access extension for you.

## Faxes

Your faxes come into the *Fax* folder. Your outgoing faxes are stored in the folders *Drafts*, *Outbox*, and *Sent*. The *Drafts* folder includes the files that you have printed to your Switchvox fax printer. The *Outbox* folder includes faxes that Switchvox is currently trying to send (or was unable to send). The *Sent* folder includes faxes that Switchvox has successfully sent.

A fax license and the fax software must be installed to make faxing available. For details, ask your Switchvox administrator.

To send a fax, check its box (you can only send one fax at a time) then click the fax machine icon (at the top of the list). You are prompted to enter a fax number. Enter the number for the fax machine you want to send this fax to, then click **Send Fax**.

**IMPORTANT:** When you enter the fax number, be sure to prefix any digits that you normally use to dial out.

Your fax is in the *Outbox* folder while it is being sent, and moved to the *Sent* folder when it has been successfully sent. If Switchvox cannot reach the other fax number to send your fax successfully, it remains in the *Outbox* folder.

**Note:** Switchvox sends fax notification email messages. These notification messages show the status of your fax. A *Pending* fax is still being sent (a fax may be Pending for a little while if Switchvox has to try multiple times), a *Sent* fax has been sent successfully, and a *Failed* fax was never received by the fax machine at the number you indicated. For details on setting up fax notifications, see [Fax Options](#).

To preview page 1 of a fax, click **Preview**.

To view or download an entire fax, click **Download**. This marks the fax as **Read** (it is no longer shown as bold).

To delete faxes, or mark them as *read* or *unread*, check the box for each fax that you want to affect. Then, click the appropriate icon (at the top of the list). If you delete faxes, you are prompted to verify the action. Be sure that you do indeed want to delete the faxes, then click **Yes, Delete**.

To move faxes to a different folder, check the box for each fax that you want to move, select the folder where the faxes belong, then click **Move To Folder**.

To forward faxes to another Switchvox user, check the box for each fax that you want to forward, select the extension to forward them to, then click **Forward To**.

To sort by column in the message list, click the column name.

For more information about faxing, see [Creating & Sending a Fax](#).

## Putting the Mailbox on Your Desktop

Your Switchvox Mailbox uses IMAP, a protocol that lets your desktop email application access remote messages as if they were stored on your computer. In this case, it means that you can access your voicemail and faxes in your Switchvox Mailbox using your regular email application (e.g., Microsoft Outlook or Mozilla Thunderbird).

Your Switchvox Mailbox does not offer outgoing mail service, so if you want to forward a message or a fax, you need to use your regular email account.

To set up your Switchvox IMAP Mailbox in your desktop email application, you'll need the following information:

- The IP address or domain name of your Switchvox mail server. This is the same IP or name that you use for the Switchvox User Suite.
- Your 'email address,' which in this case is your extension number, the @ sign, then your IP address or domain name. For example: 101@192.168.0.100, or 101@pbx.mybusiness.com.
- Your 'user name', which in this case is your extension number.
- Your password, which is the same password that you use to log into the Switchvox User Suite and to collect your voicemail.

**IMPORTANT:** If you are having trouble using your Switchvox IMAP account in your email application, check with your Switchvox administrator. It's possible that you need to use a different port number than the default (143), or that you need to set specific security options.

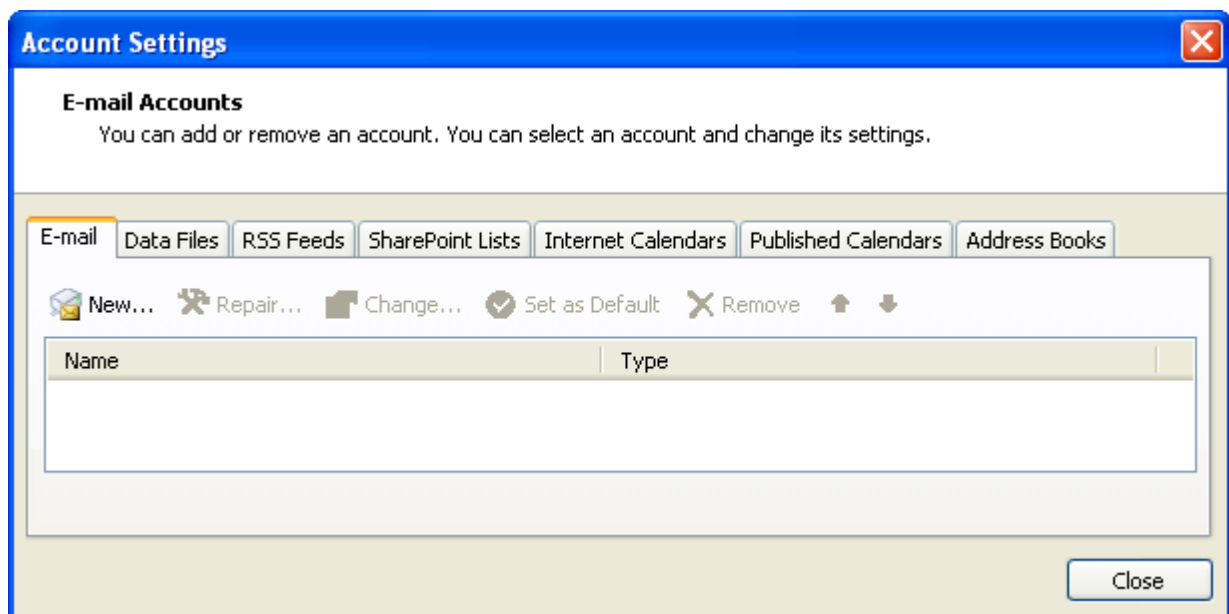
In your email application, start the process to create a new Internet email account. When you are prompted to enter the type of incoming mail server for the account, choose IMAP. Enter the rest of the information as prompted.

## Sample IMAP Setup

The following gives an example of creating an IMAP account in Microsoft Office Outlook 2007, running on the operating system Windows XP Professional.

1. Open Microsoft Outlook, and select **Tools > Account Settings**.

The *E-mail Accounts* window is displayed.



2. Click **New** to create a new e-mail account.
3. The *Auto Account Setup* window is displayed.

**Add New E-mail Account**

**Auto Account Setup**

Your Name:   
Example: Barbara Sankovic

E-mail Address:   
Example: barbara@contoso.com

Password:

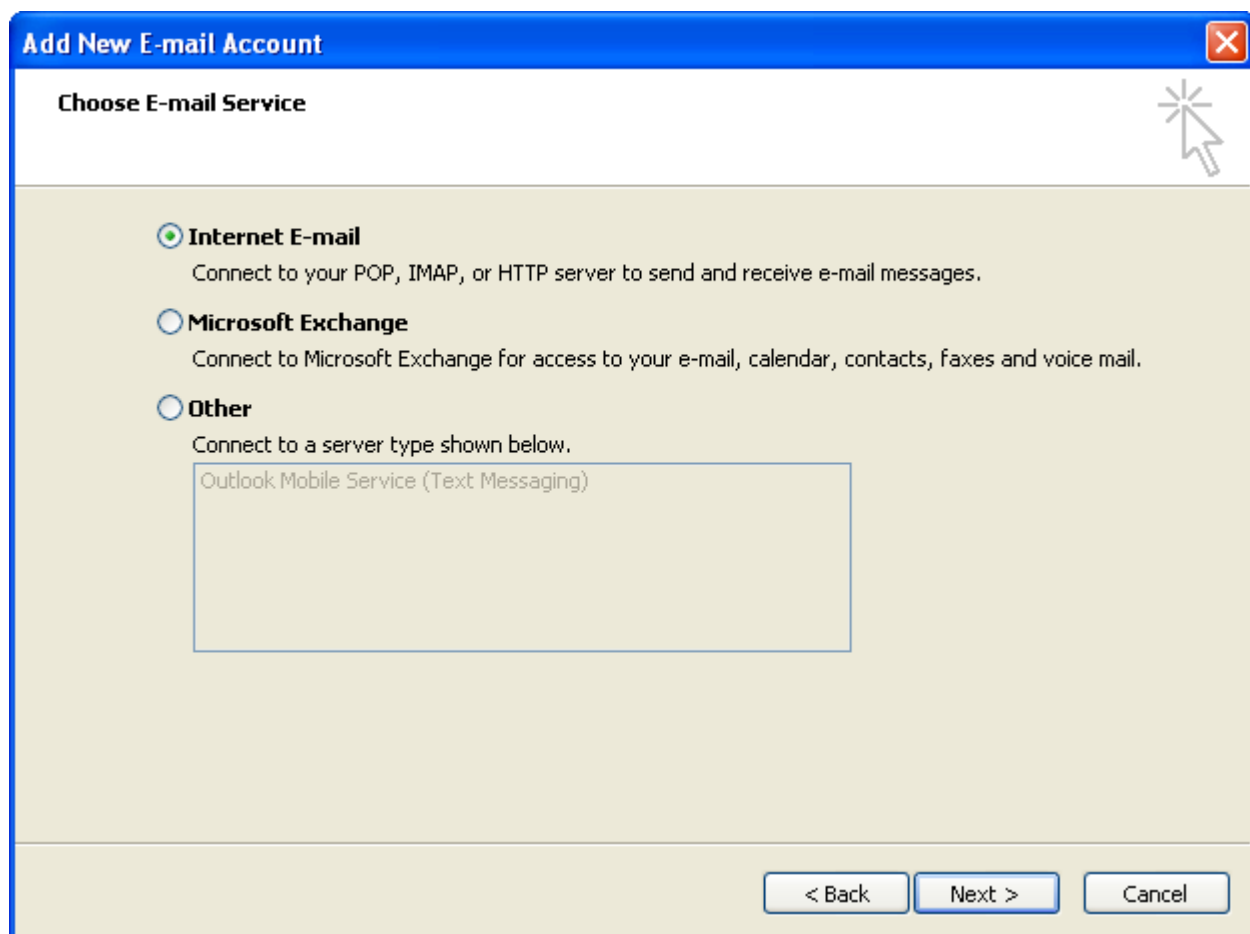
Retype Password:   
Type the password your Internet service provider has given you.

☒ Manually configure server settings or additional server types

< Back   Next >   Cancel

4. Check the box for **Manually configure server settings or additional server types**.
5. Click **Next**.

The *Choose E-mail Service* window is displayed.



6. Select **Internet E-mail**.

7. Click **Next**.

The *Internet E-mail Settings* window is displayed.

**Add New E-mail Account**

**Internet E-mail Settings**  
Each of these settings are required to get your e-mail account working.

**User Information**

Your Name: Justine Kilean

E-mail Address: 101@192.168.0.100

**Server Information**

Account Type: IMAP

Incoming mail server: 192.168.0.100

Outgoing mail server (SMTP): 192.168.0.100

**Logon Information**

User Name: 101

Password: \*\*\*\*

☒ Remember password

☐ Require logon using Secure Password Authentication (SPA)

**Test Account Settings**

After filling out the information on this screen, we recommend you test your account by clicking the button below. (Requires network connection)

Test Account Settings ...

More Settings ...

< Back   Next >   Cancel

8. Enter your name and your email address in the **User Information** section.

9. Select the Account Type IMAP, and enter the IP address or domain name of your Switchvox mail server in the **Server Information** section.

10. Enter your user name and password in the **Logon Information** section.

Check the box **Remember password** if you don't want to have to enter your password each time you access your email.

11. Click **Next**.

You're finished adding this account.

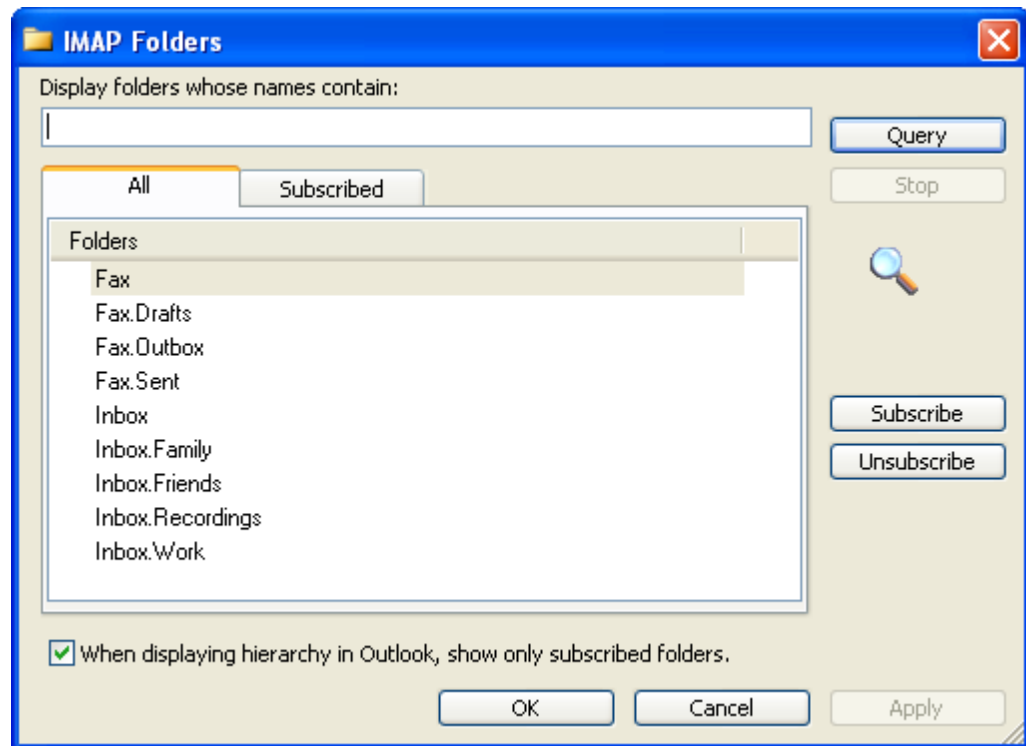
## Subscribing to Folders

When you have your Switchvox IMAP account set up in your desktop email application, you can manage the same folders that are in the Switchvox User Suite Mailbox (**Voicemail / Fax > Mailbox**).

You can 'subscribe' to all of the folders, or just the ones you want to use. If you 'unsubscribe' to a folder, it still exists in your IMAP account, it just isn't shown in your email application. You can always subscribe to it again later.

You can also create folders using your desktop application, and those folders are accessible in your User Suite Mailbox.

To subscribe to your IMAP folders in Microsoft Outlook, highlight your Switchvox IMAP Inbox and select **Tools > IMAP Folders...** The *IMAP Folders* window is displayed, shown here:



In Mozilla Thunderbird, highlight the account and select **File > Subscribe**. In either case, a list of folders is displayed that lets you subscribe and unsubscribe.

## Voicemail Options

Your Voicemail Options include setting up your voicemail greetings and defining how you want to receive notifications of a new voicemail message.

### Managing Greetings

Manage Voicemail Greetings lets you set up all of your greetings that might be played to a caller when you don't answer the phone. You can upload a sound file from your computer, or record a greeting using your phone.

The default greeting, in every situation, is for Switchvox to read your extension digits and then let the caller record a voicemail message. You can record or upload your name, and multiple custom messages for when you don't answer the phone, or you are already on a call and don't answer the phone. If you don't want to distinguish between those situations, make sure you have created an Unavailable Voicemail greeting, then check the box under the "Busy" voicemail greeting, **Use Unavailable voicemail greeting**.





## Manage Voicemail Greetings

Full name.

This recording is used in the company directory and by the default Unavailable and Busy greetings.

In Use	Greeting Name
<input type="radio"/>	<i>Read Extension Digits</i>
<input checked="" type="radio"/>	Standard



Record New Greeting

"Unavailable" voicemail greeting.

This recording is played to prompt callers to leave you a voicemail message when you do not answer your phone.

In Use	Greeting Name
<input type="radio"/>	<i>Default Unavailable Message</i>
<input checked="" type="radio"/>	Standard



Record New Greeting

"Busy" voicemail greeting.

This recording is played to prompt callers to leave you a voicemail message when you are already on a call waiting.

☐ Use Unavailable voicemail greeting.

In Use	Greeting Name
<input checked="" type="radio"/>	<i>Default Busy Message</i>

Record New Greeting

## Setting Notifications

Voicemail notification options let you customize how you want to receive a notification when you get a voicemail message. You can set up multiple email addresses, each with an email template and instructions for attaching the voicemail as a WAV file.

**Note:** Notification email messages do not synchronize with your Switchvox Mailbox. That means that if you listen to a voicemail WAV file attached to a notification message, Switchvox does not know that you have ‘read’ the voicemail.

2

**Voicemail Notification Options**

?

Tell me more about this

Add New Notification Email

#	Template	Email	Attach WAV File	Modify/D
1	Default	local copy	Yes	<div>Edit</div>
2	External	justine@mybiz.com	Yes	<div>Edit</div>

☐

Delete local copy of voicemail.

?

Tell me more about this

To add a new notification option, click **Add New Notification Email**. Enter your Email address, select a template, and select *Yes* or *No* to indicate whether or not to attach the voicemail WAV file to the email message.

To edit a notification option, click its **Edit** button.

To delete a notification option, click its **Delete** button. You cannot delete the **local copy** option (that is the copy in your Switchvox IMAP mailbox), but you can change the template. This is the template that you will see if you subscribe to your Switchvox IMAP mailbox using your desktop email application.

## Delete local copy of voicemail

To delete the Switchvox copy of the voicemail once its sent to your email address(es), check the box **Delete local copy of voicemail**. This option lets you handle your voicemail entirely through your own email account.

## Managing Notification Templates

Voicemail Email Templates let you customize your voicemail notification email messages. You can create multiple templates and tailor them to different types of email accounts. These custom templates are available (along with default templates) when you create or edit a Voicemail Notification Option.



## Voicemail Email Templates

---



[Tell me more about this](#)

### Create A New Voicemail Email Template

Template Name:

**Create New**

### View Default Voicemail Email Templates

Default



**View**

You can use variables in your template that are substituted with real values when the email gets sent. For example, %VM\_CALLERID% in a template prints as the caller's name and phone number. There is a full list of these variables on the pages where you create or edit a template.



'Customer Service.' Callers can leave messages on one extension, then all of those messages are forwarded to the appropriate people. This is also useful internally, if you want to send a message to everyone in a group.


To define a specific set of extensions to receive the forwarded voicemail, select **Individual Extensions**, and move the appropriate extensions into the box on the right.

To specify an Extension Group to receive the forwarded voicemail, select **Predefined Group**, then choose an Extension Group from the dropdown.

To delete each message from this extension's Mailbox after the message is forwarded, check the box **Delete on Forward**.

To send forwarded messages to all of the recipients, choose *Send to All* from the **Forwarding Type** dropdown. To send forwarded messages to one recipient at a time, choose *Round Robin*. With *Round Robin*, Switchvox forwards each message to the next recipient, moving through the list of recipients in the same order as they are listed (in the extensions box above, or in the Extension Group).

**4 Voicemail Forwarding**

 [Tell me more about this](#)

☐ Enable Voicemail Forwarding

☒ Individual Extensions

All Available Accounts

101 "Justine Kilean"  
102 "Jane Doeson"  
103 "John Smith"  
104 "Gilbert Brown"  
105 "Agner Witt"  
106 "Spencer Flemming"  
107 "Newton Degenhardt"  
108 "Webster Savage"  
109 "Posey Podolsky"  
110 "Ortiz Schuster"

Forward to Members

-OR-

☐ Predefined Group: Default Group

☐ Delete on Forward

Forwarding Type: Send to All

**Save Forward Settings**

## Fax Options

Fax Options let you 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.

A fax license and the fax software must be installed to make faxing available. For details, ask your Switchvox administrator.

[Settings](#) [Voicemail / Fax](#) [Call History](#)

### Fax Options

**1** Fax Notification Options ?

Add New Notification Email

#	Email	Modify/Delete
1	justine@mybiz.com	<a href="#">Edit</a> <a href="#">Delete</a>

**2** Receiving / Sending Options ?

☐ This extension only sends faxes.

Fax Header

[Show Advanced Options](#)

Save Fax Options

## Fax Notification Options

Add, Edit, or Delete the email addresses that you want to receive notifications of a new incoming fax.

This is useful if you want to be notified at both your work and personal email addresses, or if you want your administrative assistant to be notified.

## This extension only sends faxes

If this extension is really a fax machine and won't make any voice calls, check the box **This extension only sends faxes**.

Switchvox handles all outgoing activity as a fax:

- Print a fax-file
- Put it in the *Fax.Outbox* folder in that extensions's Mailbox
- Send the fax

# Fax Header

Enter a Fax Header to be sent with each fax that you send. For example:

Digium, Inc. | 877.546.8963 | Fax: 858.555.1212

This is the information that is printed along the very top of your fax pages (not to be confused with a cover page).

## Advanced Options

It is unusual to change the Advanced Options, so they are hidden. If you find that you need to change an Advanced Option, click **Show Advanced Options**.

### Local Station ID

Text string that identifies the sender identification to the remote side of the fax transmission. Default is to leave blank.

### Disable Error Correction Mode (ECM) for G711 fax sessions

Disable error correction mode (ECM). The default is to leave this feature enabled.

### Minimum transfer rate for fax transmissions

Minimum transfer rate used during fax rate negotiation. The default minimum transfer rate is 2400.

### Maximum transfer rate for fax transmissions

Maximum transfer rate used during fax rate negotiation. The default maximum transfer rate is 14400.

### Number of redundant signal packets for T38 fax sessions

T38 Error Correction Code (ECC) Signal Redundancy. This option specifies the number of redundant signal packets contained in a T38 signal frame. The default value is 3.

### Number of redundant image packets for T38 fax sessions

T38 Error Correction Code (ECC) Data Redundancy. This option specifies the number of redundant image packets contained in a T38 image frame. The default value is 1.

### Number of maximum expected T38 packet delay

Maximum expected T38 packet delay in milliseconds. The result of this specification is all T38 packets are padded to prepare the fax stack for the specified delay. As long as the packet delay is less than or equal to the specified value, the fax stack will not realize that there is an actual packet delay because of the packet padding. The default value of 800 milliseconds should cover most use cases.

# Creating & Sending a Fax

Sending a fax from your desktop computer using Switchvox is a two-step process:

1. Open a file in any application and print it to the Switchvox fax printer.

This stores a copy of the file in your Switchvox Mailbox *Fax Drafts* folder.

2. Go to the Switchvox User Suite **Voicemail / Fax > Mailbox**, select the *Fax Drafts* folder, and click the fax machine icon (at the top of the list) to send that file to a fax machine. For details, see [Faxes](#).

A fax license and the fax software must be installed to make faxing available. For details, ask your Switchvox administrator.

## Setting up a Fax Printer

To make faxes for Switchvox, you need to first set up a generic printer that you can use from any application. You only have to do this once.

Depending on your desktop environment there are many ways to set up a printer, but there is some specific information that you need to set up a Switchvox Fax Printer:

- For **Windows-based operating systems**, the URL is

```
http://YourDomain:631/printers/faxprinter
```

Where *YourDomain* is the domain that you normally use to go to your Switchvox User Suite. This may be an IP address or a domain name.

- For **Linux- or Macintosh-based operating systems**, the URL is

```
http://ext:password@YourDomain:631/printers/faxprinter
```

Where *ext* is your extension, *password* is the password that you use to log into the Switchvox User Suite or to collect your voicemail, and *YourDomain* is the domain that you normally use to go to your Switchvox User Suite. This may be an IP address or a domain name.

- For **any** operating system, use a generic postscript printer driver.

Our suggestion for Windows-based operating systems is the driver from IBM: *IBM Network Printer 17 PS*. For Linux- and Macintosh-based operating systems you should choose a generic postscript printer driver.

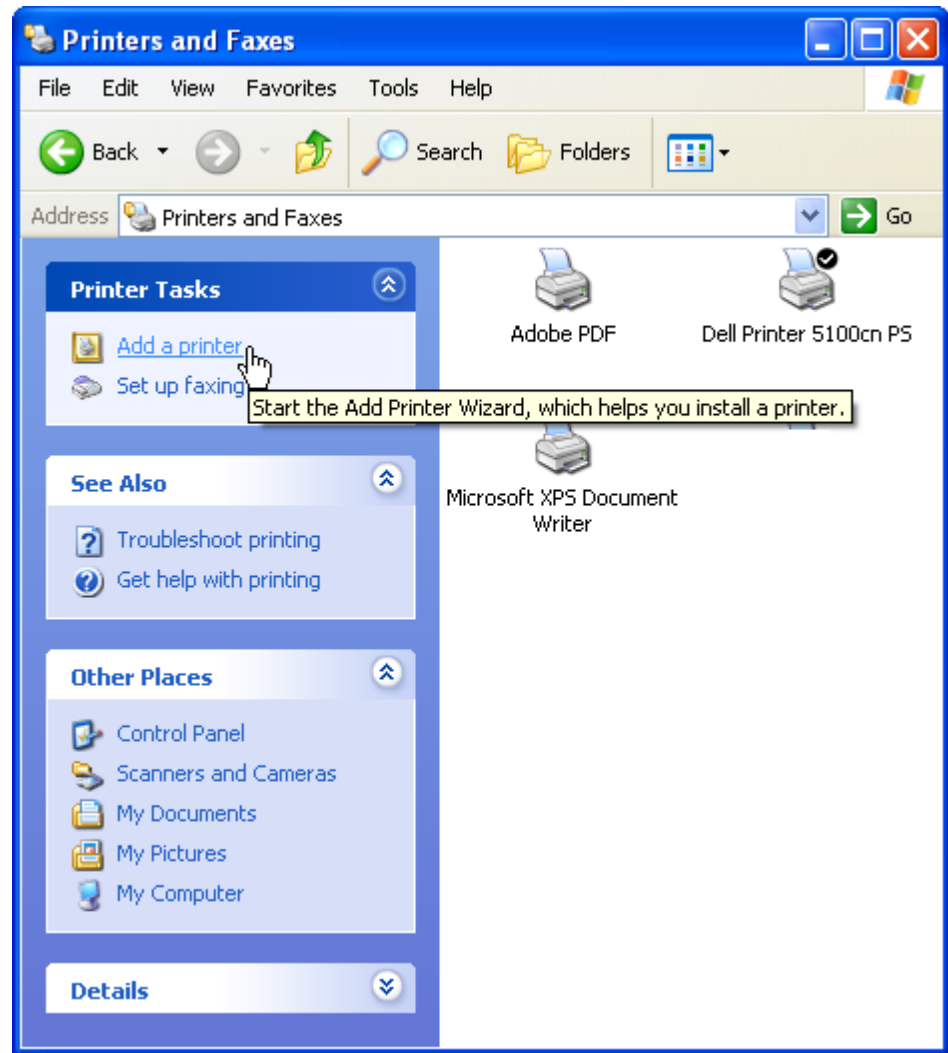
## Sample Printer Setup

The following gives an example of setting up a Switchvox fax printer for a computer running a Windows XP Professional operating system.

1. From the **Start** menu, go to **Printers and Faxes**.

The Printers and Faxes window is displayed.





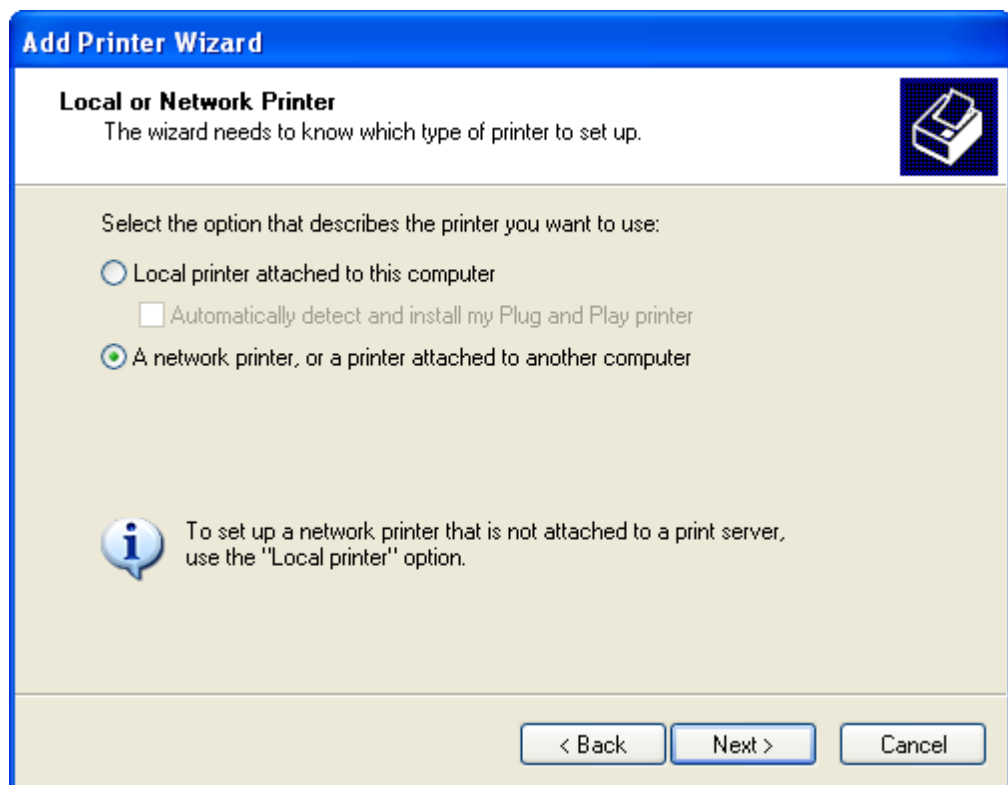
2. Click **Add a Printer**.

The Add Printer Wizard is displayed.



3. Click **Next**.

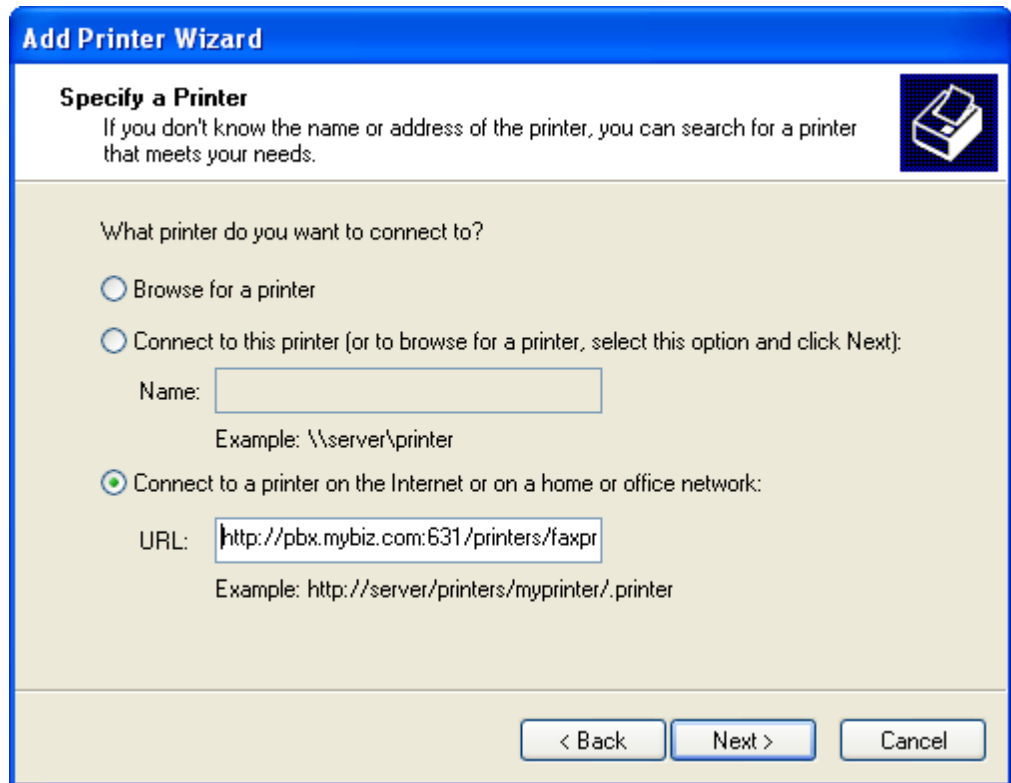
The Local or Network Printer windows is displayed.



4. Select *A Network Printer...*

5. Click **Next**.

The Specify a Printer window is displayed.



The screenshot shows the 'Add Printer Wizard' window with the title bar 'Add Printer Wizard'. The main heading is 'Specify a Printer'. Below it, a text box says: 'If you don't know the name or address of the printer, you can search for a printer that meets your needs.' To the right of this text is a printer icon. The main area contains the question 'What printer do you want to connect to?' followed by three radio button options. The first option is 'Browse for a printer'. The second option is 'Connect to this printer (or to browse for a printer, select this option and click Next):', with a text box labeled 'Name:' and an example '\\server\printer'. The third option is 'Connect to a printer on the Internet or on a home or office network:', with a text box labeled 'URL:' containing 'http://pbx.mybiz.com:631/printers/faxpr' and an example 'http://server/printers/myprinter/.printer'. At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'.

**Add Printer Wizard**

**Specify a Printer**  
If you don't know the name or address of the printer, you can search for a printer that meets your needs.

What printer do you want to connect to?

☐ Browse for a printer

☐ Connect to this printer (or to browse for a printer, select this option and click Next):

Name:

Example: \\server\printer

☒ Connect to a printer on the Internet or on a home or office network:

URL:

Example: http://server/printers/myprinter/.printer

< Back   Next >   Cancel

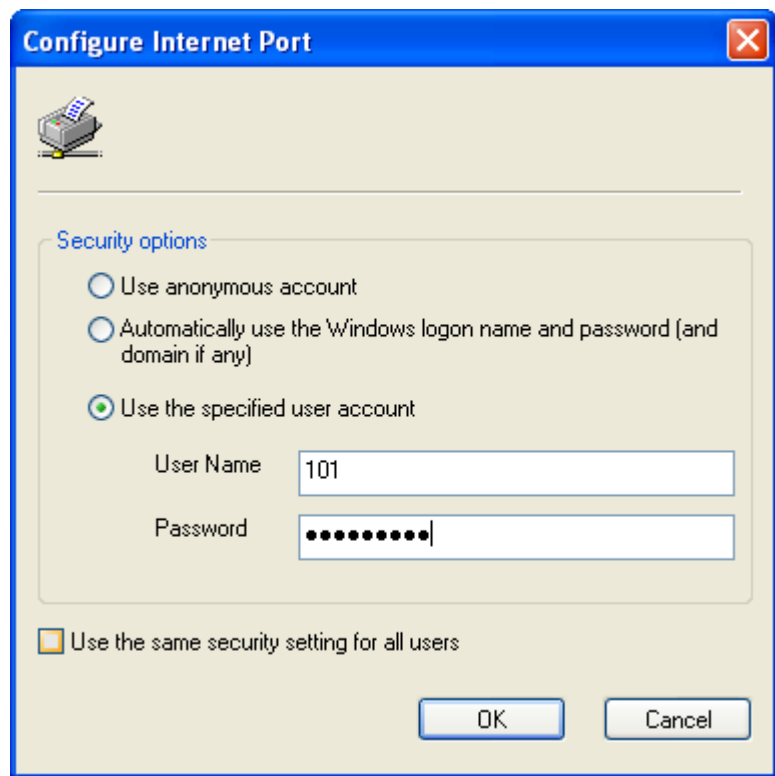
6. Select *Connect to a printer on the Internet or on a home or office network*, and enter the following URL:

`http://YourDomain:631/printers/faxprinter`

Where *YourDomain* is the domain that you normally use to go to your Switchvox User Suite. This may be an IP address or a domain name.

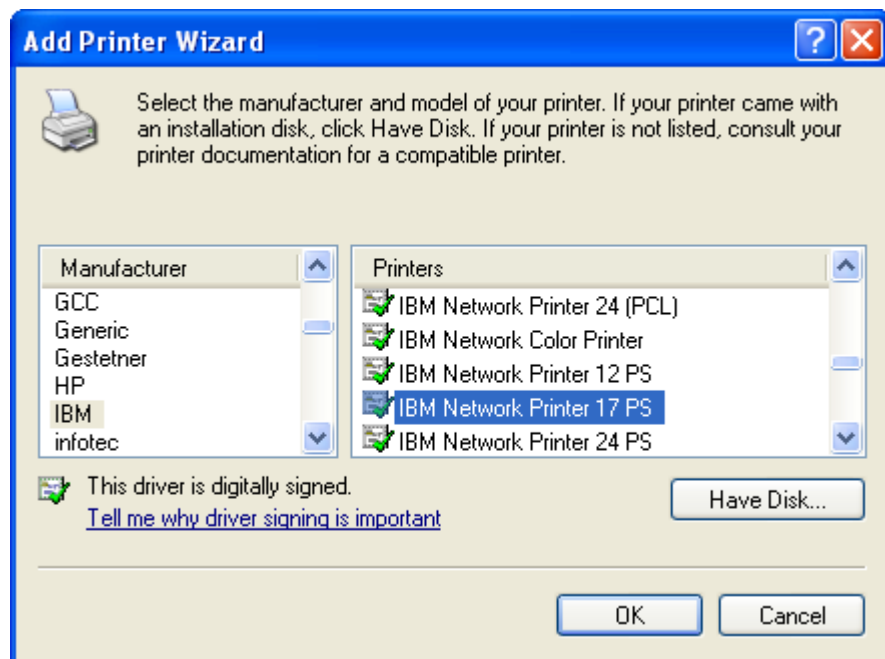
7. Click **Next**.

The **Configure Internet Port** window is displayed.



8. Select *Use the specified user account*, and enter your extension number and your password. This is the same password that you use to log into the Switchvox User Suite or to collect your voicemail.
9. Click **OK**.

The manufacturer and model window is displayed.



10 Select *IBM* from the Manufacturer list on the left, then select *IBM Network Printer 17 PS* from the Printers list on the right.

We suggest this printer driver because it is a widely available, standard printer driver. If you are using a different operating system, choose a generic postscript printer driver.

The Printer Wizard copies the appropriate files for you and sets up your new printer.

Wait until the Default Printer page is displayed, then go on.

11 Select *Yes* or *No*, depending on whether you want this to be your default printer. (You probably want to select *No*).

The final page of the Printer Wizard is displayed.

12 Click **Finish**.

In the Printers and Faxes window, you can see the new printer **faxprinter on http://YourDomain:631**

## Sending a Fax

Now that you have your fax printer set up, you can create a fax from any application.

1. Select the Print option from the application that you are using to view this document. (Or any open file that is handy.) In the Print dialog box, select the new 'faxprinter' as the printer to use, and print the file.
2. In your Switchvox User Suite, go to **Voicemail / Fax > Mailbox**. Select *Fax:Drafts* from the **View Folder** dropdown.

Your *Fax.Drafts* folder is opened, and your drafts are listed. The test page that you printed is in the list, and you can preview the first page, or download a PDF of the entire fax.

Check the box for your fax, then click the fax machine icon (at the top of the list). You are prompted to enter a fax number. Enter the number for the fax machine you want to send this fax to, then click **Send Fax**.





Your fax is in the *Outbox* folder while it is being sent, and moved to the *Sent* folder when it has been successfully sent.


[Settings](#) | **Voicemail / Fax** | [Call History](#)

**Mailbox**




Organize your fax as easily as you organize your email. Put faxes into folders, forward fax me from the system.

View Folder:





Fax in Fax.Drafts folder ( 1 to 1 ) of 1

	Date Created 	Source	# Pages	Preview
<input checked="" type="checkbox"/>	Wed Mar 18 2009, 2:14:29 PM	Fax Printer	1	 <a href="#">Preview</a>




# Call History

Under the Call History tab are two sections, Call Log and Call Reporting. These allow you to track your phone use.

## Call Log

The Call Log is 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 Report** to see log in the User Suite, or click **Output to .xls file** to download an xls file.

By default, a list of all incoming and outgoing calls is displayed. The list includes the call date, who the call was from and to, the type of call (incoming or outgoing), the call time, and the talk time. If you are viewing the log in the User Suite, you can mouse over the Call Details to see more details about the call.



Settings	Voicemail / Fax	Call History		
<b>Call Log</b>				
Use this form to view the call history of this extension for a range of dates.				
From Date: <input type="text" value="03/17/2009"/>  To Date: <input type="text" value="03/18/2009"/> 				
mm/dd/yyyy mm/dd/yyyy				
<a href="#">View Report</a> <a href="#">Output to .xls file</a>				
Call Log ( 1 to 6 ) of 6				
Call Date 	Call From	Call To	Call Type	Call Time
03/18/09 3:28:19 PM	<b>Justine Kilean</b> <101>	Gilbert Brown <104>	outgoing	39s
03/18/09 3:22:30 PM	John Smith <103>	<b>Justine Kilean</b> <101>	outgoing	4s
03/18/09 2:10:15 PM	John Smith <103>	<b>Justine Kilean</b> <101>	outgoing	53s
03/18/09 2:09:05 PM	John Smith <103>	<b>Justine Kilean</b> <101>	outgoing	1m, 0s
03/18/09 2:08:00 PM	John Smith <103>	<b>Justine Kilean</b> <101>	outgoing	14s
03/18/09 1:18:25 PM	Jane Doeson <102>	<b>Justine Kilean</b> <101>	outgoing	10s

## Call Reporting

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 information that you specify.

In the Report fields section you select one or more of the fields you would like included in the report or graph. After you have chosen the desired fields you can choose how you want the report broken down. By default the reports are broken down by date such that a data point is displayed for each day between the From and To date.

You can instead opt to have the report broken down by the Hour of Day, the Day of Week or just one data point for the whole range by selecting Total Cumulative. When you have finished specifying your criteria, you can opt to have the report printed to the screen, sent to your desktop as an .xls file or view it in graphical form in a chart.

Settings	Voicemail / Fax	Call History
<h3>Call Reporting</h3> <p>Use this form to generate custom statistical reports about this extension's call history.</p> <p>From Date: <input type="text" value="03/17/2009"/>  To Date: <input type="text" value="03/18/2009"/>  mm/dd/yyyy mm/dd/yyyy</p> <p>Report Breakdown: <div><div>Total Cumulative</div><div>Total Cumulative By Date By Hour of Day By Day of Week</div></div></p> <p>Report Fields: <div><div>Total Number of Calls Total Number of Incoming Calls Total Number of Outgoing Calls Total Talking Time Total Call Duration Average Talk Time per Call Average Call Time per Call</div></div></p> <p>Hold down CTRL to select multiple items</p> <p><input type="button" value="View Report"/> <input type="button" value="Output to .xls file"/> <input type="button" value="Chart Report"/></p>		

# The Switchboard

The Switchboard is a graphical display of what's happening on Switchvox. It shows your own calls, your coworkers' calls, call-queue activity, and your parking lot. You can drag and drop to transfer calls, and one click lets you make a call, pick up calls, record or monitor calls, log in and out of call queues, and more.

In addition to all of the Switchvox interaction, the Switchboard is also 'Web Aware,' which means that you can integrate other web applications with your call activity. Built-in panels bring SugarCRM, Salesforce, and Google Maps to the Switchboard, and you can build custom panels that use the URL of your choice.

To open your Switchboard, click **Launch Switchboard** (in the upper right corner of your User Suite).

In the upper right of the Switchboard, you can see the number of voicemail messages that you have, new and old. There is also an **Options** menu that lets you control your Switchboard.

Your Switchboard lets you have up to 6 active lines on your extension (in the Current Calls panel), regardless of your phone's capabilities.

## About the Options Menu

The **Options** menu lets you control what is on your Switchboard, and how it is laid out. It also let you set your status for your fellow Switchvox users.

## Save Layout

**Save Layout** lets you save your Switchboard layout. The next time you open the Switchboard, the window is the same size, and the same panels are open in the same place.

## Panels

**Panels** let you open and close all of your Switchboard panels. Each of your Phonebooks is available as a separate panel.

Your Switchvox administrator must give you permission to use many of the features available in the Switchboard Panels. If you see a feature described here that is not available to you, please ask your administrator.

## My Presence

**My Presence** lets you set your Switchboard presence so that your co-workers can see your status and decide how to communicate with you.

The *Away* and *Extended Away* options let you include a comment so that you can let people know when you might be back.

## Panels

The Switchboard panels let you see into the activity on Switchvox and manage your calls.



# Current Calls Panel

The Current Calls panel displays all of the active calls on your extension, and gives you many options for handling those calls. You can have as many as six current calls in the Switchboard, even if your handset does not support that many.

## Send Call

If you choose not to answer a call, click **Send** to send the call to your Call Rules. The default rule is to send your calls to voicemail, so most likely **Send** means the caller is sent to your voicemail.

## Hold & Resume

When you are on a call, one click puts that call on Hold, or Resumes the call.

**Note:** Resume is not available until you put the call on Hold.

## Take Another Call

You can put your active call on Hold, and then answer another incoming call. You can have as many as six current calls in the Switchboard, even if your handset does not support that many.

## Transfer: Assisted & Blind

To transfer a call to someone in your Phonebook, just click the call and drag it from Current Calls to the Phonebook entry. You can transfer a call at any time, even if you have the call on hold, or the other extension is on an active call.

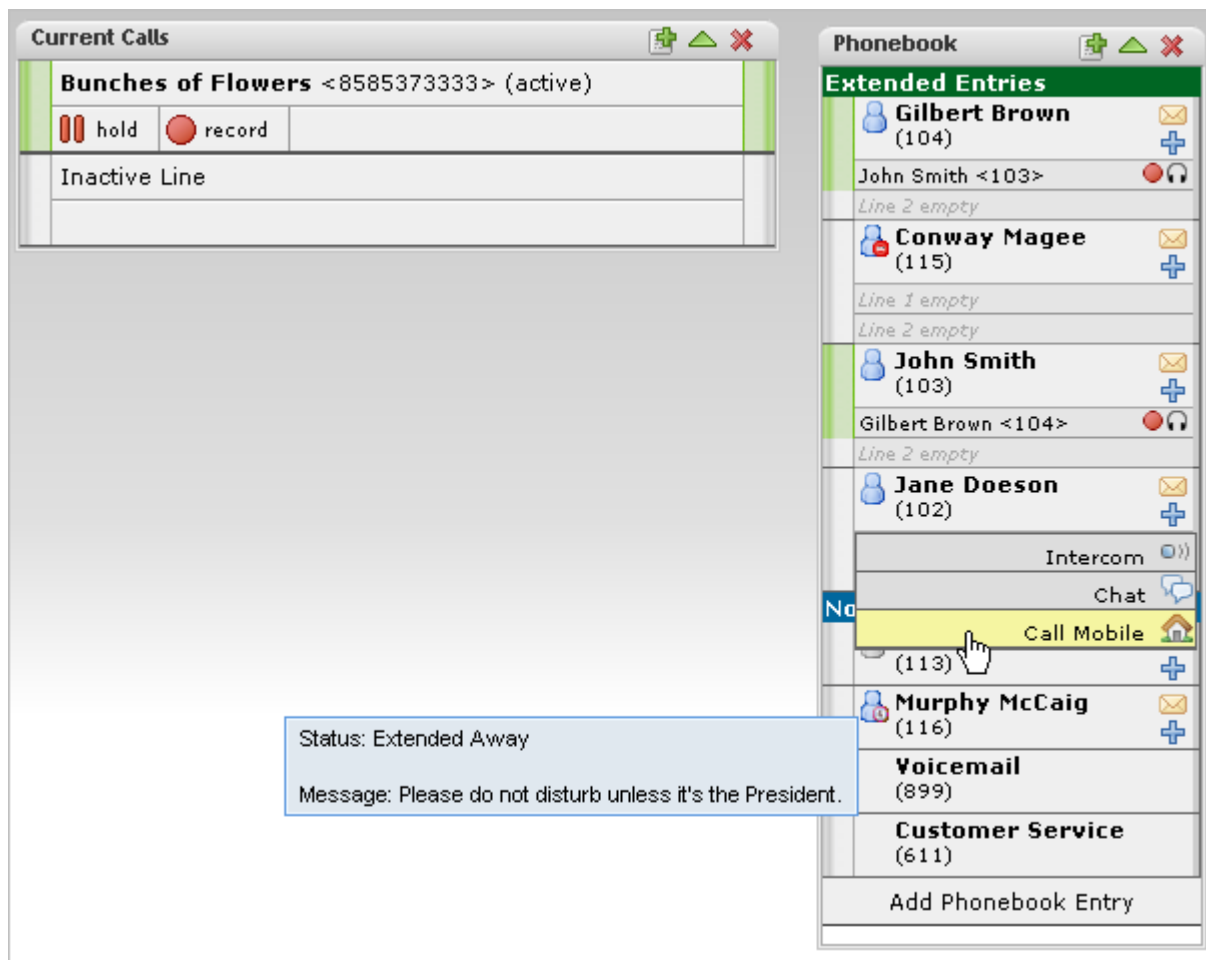
In an assisted transfer, you would put the caller on hold, call your co-worker to let him know you'd like to transfer a caller, then complete the transfer. In a blind transfer, you would just drag the call to the Phonebook entry.

## Transfer to Voicemail

To transfer a call to your coworker's voicemail, just click the call and drag it from Current Calls to the Phonebook entry's envelope icon. This is handy if you know your co-worker isn't able to take the call.

## Record

When you are on a call, you can click to start and stop a recording of your call. The recording is sent to your voicemail Mailbox, where you can save or forward it. Don't forget, it's up to you to let the other party know that you're recording the call.



## Directory Panel

The Directory panel offers you access to all of the extensions in Switchvox. You can click and drag a call to an entry in the Directory Panel to transfer the call to that extension.

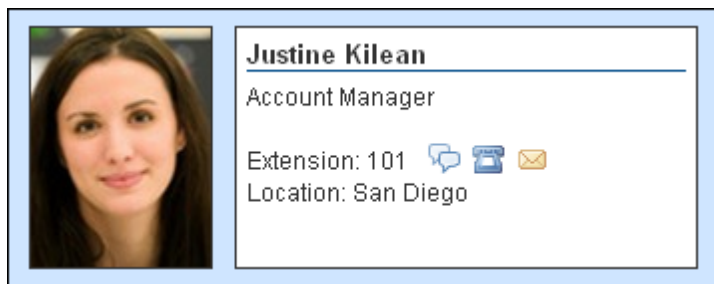
## Parking Lot Panel

The Parking Lot panel lets you 'Park' a call so that the call can be picked up at a different extension. To Park a call, just click and drag the call to the Parking Lot panel. Then, you or any of your coworkers can pick up a phone and dial the Parking Lot extension to be connected to the caller.

An extension must have permission to pick up a parked call.

## Profile Panel

The Profile Panel shows you the profile of the extension-owner you are talking to. Profile information can be entered by the Switchvox administrator, or by the extension owner.



An Extension Profile includes some or all of the following:

- Image
- First and Last Name
- Title
- Location
- Extension Number

Profiles can be shown in the Switchboard and on a phone that uses a Phone Feature Pack. For details, see [Your Phone Feature Pack](#).

This panel also offers several one-click options to reach this person:

- Chat  
Start a chat with this extension.
- Call  
Call this extension. The Switchboard rings your phone, and then when you answer it rings this extension. (You may be able to set up your phone so that it automatically answer calls from the Switchboard; see [Phone Options](#).)
- Voicemail  
Call the voicemail for this extension. The Switchboard rings your phone, and then when you answer it rings this extension's voicemail box so that you can leave a message. (You may be able to set up your phone so that it automatically answer calls from the Switchboard; see [Phone Options](#).)

## Phonebook Panels

Each Phonebook panel displays the entries in that Phonebook. You can click on any entry to dial that number. Some extensions can display as Extended Entries, to help you communicate more effectively with that person.

### Normal Entries

Normal Phonebook entries show your coworkers' extensions or your frequently dialed external phone numbers. Each extension is shown with its Presence information, and you can click on any of these to dial them, like a speed dial button.

Also, Normal entries provide a 'plus' icon that includes options to dial that person's Additional Numbers, chat with him, or Intercom to him.

You must have permission to use Chat and Intercom. Chat may not be available if for some reason you can't chat with that person.

## Extended Entries

Extended Phonebook entries have all of the normal extension options, but they also let you do the following with that extension's calls:

- Pick up an incoming call
- See who the caller is
- Record the call
- Monitor the call (the callers do not hear you)
- Barge into the call (both callers hear you)
- Whisper on the call (only your co-worker hears you)

You must have permission to use each of these options.

## Presence

All Phonebook entries display the person's **Presence**, which helps you and your coworkers be selective about what calls to transfer to each other. An *Away* or *Extended Away* Presence can include comments.

## Intercom

All Phonebook entries can include the **Intercom** option, which lets you talk to a coworker through the speaker on his phone. With Intercom, your recipient doesn't even need to pick up the handset to answer your call.

You must have permission to use this.

## Pickup

Extended Phonebook entries can include the **Pickup** option (the green 'up' arrow). One click and your coworker's incoming call rings your extension also.

You must have permission to use this.

## Record

Extended Phonebook entries can include the **Record** option. One click records the call, and sends the recording to your voicemail Mailbox.

You must have permission to use this.

## Monitor

Extended Phonebook entries can include the **Monitor** option. If you monitor a call, the callers cannot hear you.

You must have permission to use this.

## Barge

Extended Phonebook entries can include the **Barge** option. If you barge into a call, both of the callers can hear you.

You must have permission to use this.

## Whisper

Extended Phonebook entries can include the **Whisper** option. If you whisper into a call, the caller cannot hear only (only the extension owner can hear you).

You must have permission to use this.

Current Calls

<b>Bunches of Flowers</b> <8585373333> (holding)	
resume	
<b>Jane Doeson</b> <102> (holding)	
resume	
<b>Acme Builders</b> <16057223333> (ringing)	
send	
Inactive Line	

Parking Lot

Parked At	Caller Parked
701	<b>Freewave Surfboards</b> (8055551212)

Phonebook

Extended Entries

<b>Agner Witt</b> (105)  Line 1 empty Line 2 empty	<b>Jane Doeson</b> (102)  Justine Kilean <101> Line 2 empty	<b>Morris Madsen</b> (113)  Line 1 empty Line 2 empty
<b>Conway Magee</b> (115)  Line 1 empty Line 2 empty	<b>John Smith</b> (103)  Gilbert Brown <104> Line 2 empty	<b>Murphy McCaig</b> (116)  Line 1 empty Line 2 empty
<b>Gilbert Brown</b> (104)  John Smith <103> Line 2 empty	<b>Moon Bradley</b> (114)  Line 1 empty Line 2 empty	<b>Ortiz Schuster</b> (110)  Line 1 empty Line 2 empty

Normal Entries

<b>Voicemail</b> (899)	<b>Customer Service</b> (611)	<b>Sales</b> (612)
<b>Newton Degenhardt</b> (107) 	<b>Posey Podolsky</b> (109) 	<b>Harvey Culver</b> (111) 

Add Phonebook Entry

## Chat Panel

The Chat panel lets you chat with your Switchvox co-workers. The main page of the Chat Panel offers a list of people you can double-click to start a chat. Or, enter a Jabber ID and click **Start Chat**.

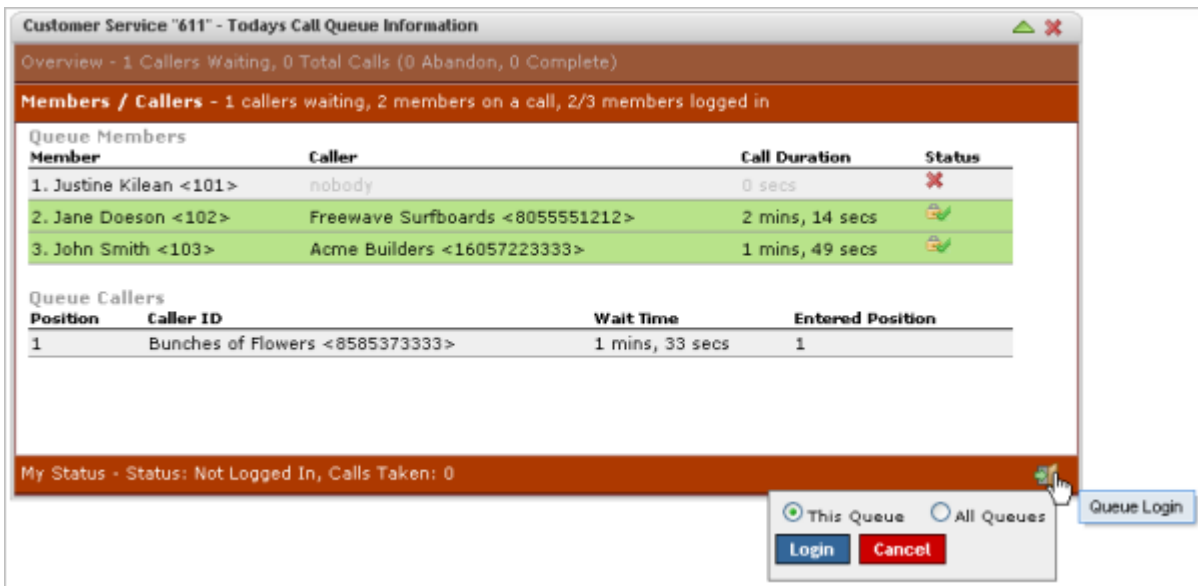
You must have permission to use this.

## Queue Panels

Each Call Queue panel in your Switchboard contains views into that queue's activity and statistics for the day.

For queue members, you can log into or out of each queue with one click. Or, you can pause your status and add a comment, letting your co-workers know why you're unavailable and when you'll be back.

You must have permission to use this.



## CRM Panels

These time-saving panels integrate with your CRM application. When a call rings your phone, all of the information for this customer is displayed immediately, before you even answer the phone!

You must have permission to use this.

## Google Maps Panel

The Google Maps panel shows you where your caller is on a map based on area code and prefix. A popup window lets you scroll through previous callers' locations.

You must have permission to use this.

## Custom Panels

Your Switchvox administrator may have set up custom panels that integrate with Web applications. Ask your administrator for more information.

## Popup URLs

Your Switchvox administrator can write external applications that set a display URL for each incoming call. If this value is set, then the URL button lights up and clicking it opens a new window with the specified URL. If you want that window to automatically open when a call comes in, click the green plus sign at the top-right of the panel.