



Digium Switchvox User Guide

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To Login:

- Once your phone is connected to the network, open a web browser (Chrome or Firefox is recommended) and enter _____ into the address bar. This will bring you to the login page. User name will be **your extension**, and default password will be **Password!1**



The image shows a login page for Digium Switchvox. At the top center is the Digium logo, which consists of a blue speech bubble containing an orange asterisk, followed by the word 'digium' in blue and 'Switchvox' in grey below it. Underneath the logo are two text input fields. The first field is labeled 'Extension' and the second is labeled 'Password'. Below these fields is a prominent blue button with the text 'Sign in' in white. At the bottom center of the page, there is a small, faint link that says 'Forgot Password?'.

My Account Page:

- Once you've accessed your account page, verify, or enter all of the information in the text fields.
- This is where you will change your password. **Your password must include at least one number, one lower and upper-case letter, and one special character.** If these requirements are not met, you will be prompted to re-enter your new password.
- You will also have to choose a numeric pin for accessing your voicemail (if applicable)
- If you choose to, you can upload a picture to be used as your profile picture.
- When all of your information is entered correctly, click "**Save Account Information.**"
- You can return to this page anytime by choosing Features > My Account.

The screenshot displays a web interface for managing a user account. At the top, there are navigation tabs for 'Features', 'Voicemail / Fax', and 'Reporting'. A 'Switchboard' status indicator with a checkmark and a user icon is visible in the top right corner. The main heading is 'My Account' with a help icon.

The 'Profile Information' section contains the following fields:

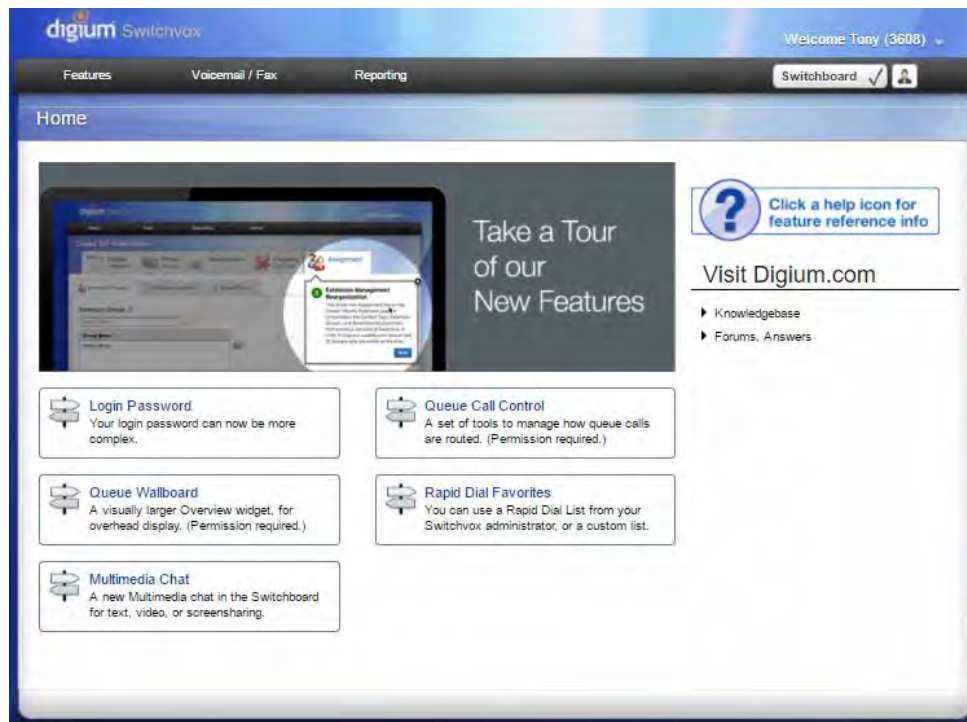
- First Name:
- Last Name:
- Email Address: (For notifications)
- Location:
- Title:
- Language / Locale: (with a dropdown arrow)
- Timezone: (with a dropdown arrow)
- Password: (For web tool access)
- Retype Password:
- Numeric PIN: (For voicemail)
- Retype Numeric PIN:
- Sound Prompt Language: (with a dropdown arrow)
- Minimalist Mode: NO

The 'Profile Picture' section includes a note: 'A Profile Picture must be a JPG image, at least 75x100 pixels.' Below this is a placeholder image of a blue person icon. To the right of the image are three small icons: a person, a camera, and a trash can. Below the image area is a button labeled 'Advanced Settings' with a right-pointing arrow.


At the bottom of the form is a blue button labeled 'Save Account Information' with a checkmark icon.

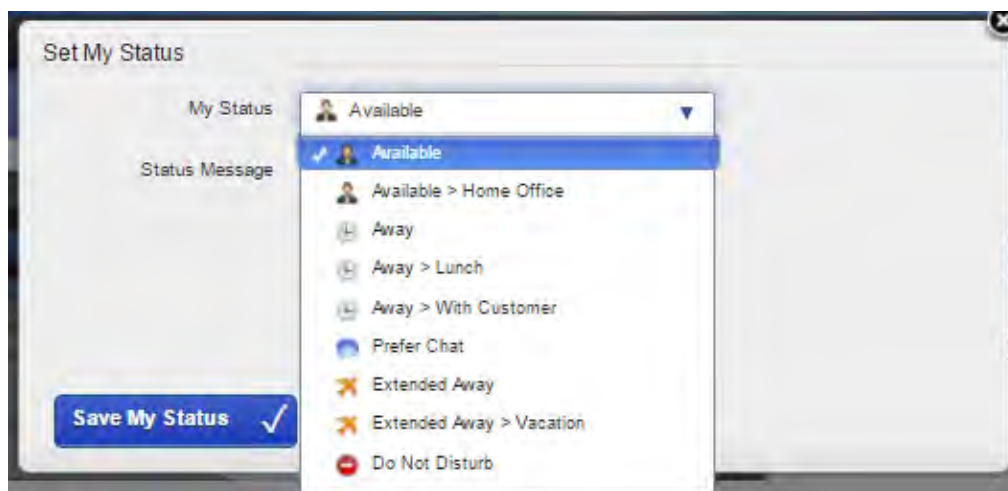
The Home Page:

- After your login, it will bring you to the "Home" page.
- From here you can access everything you need to customize your phones features, your voicemail/fax, and call reporting.



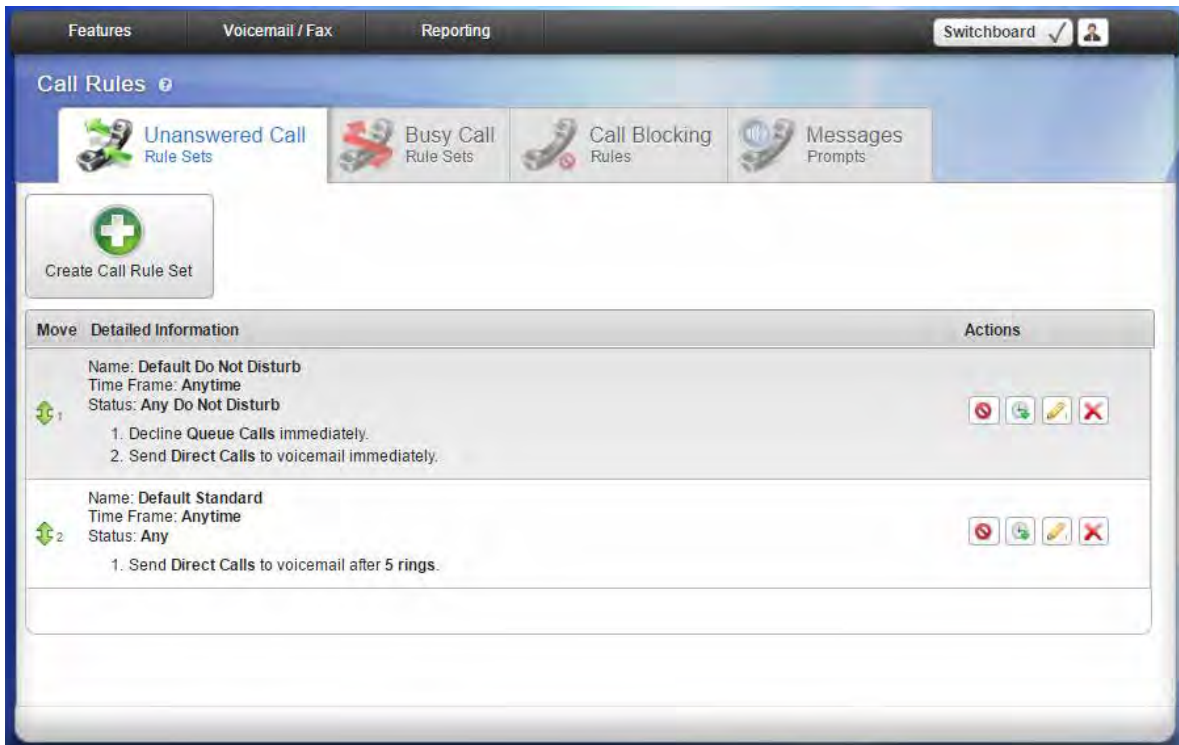
Setting Your Status:

- By clicking the  icon in the top right corner of the home page, you can set your current status. Click on the **"My Status"** drop-down menu to select. You can also enter a status message if more clarification is needed.
- Click **"Save My Status."**



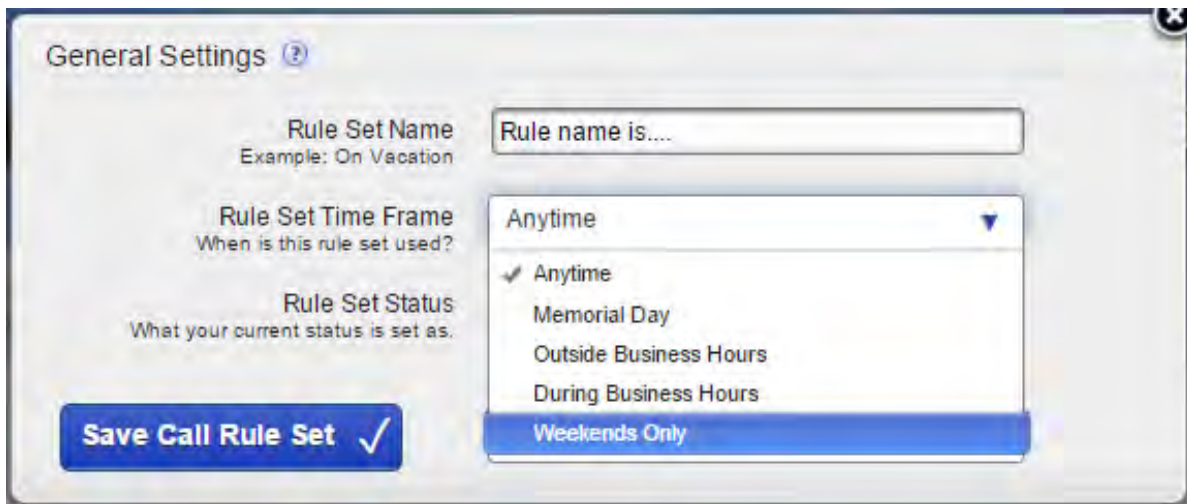
Features > Call Rules > Unanswered Calls:

- The screen below shows the basic unanswered call rules that are created by default, i.e., When in **"Do Not Disturb"** mode, unanswered calls will immediately be transferred to voicemail. When status is set as **"available,"** any unanswered call will be directed to voicemail after 5 rings.
- To create a new call rule, click **"Create Call Rule Set."**

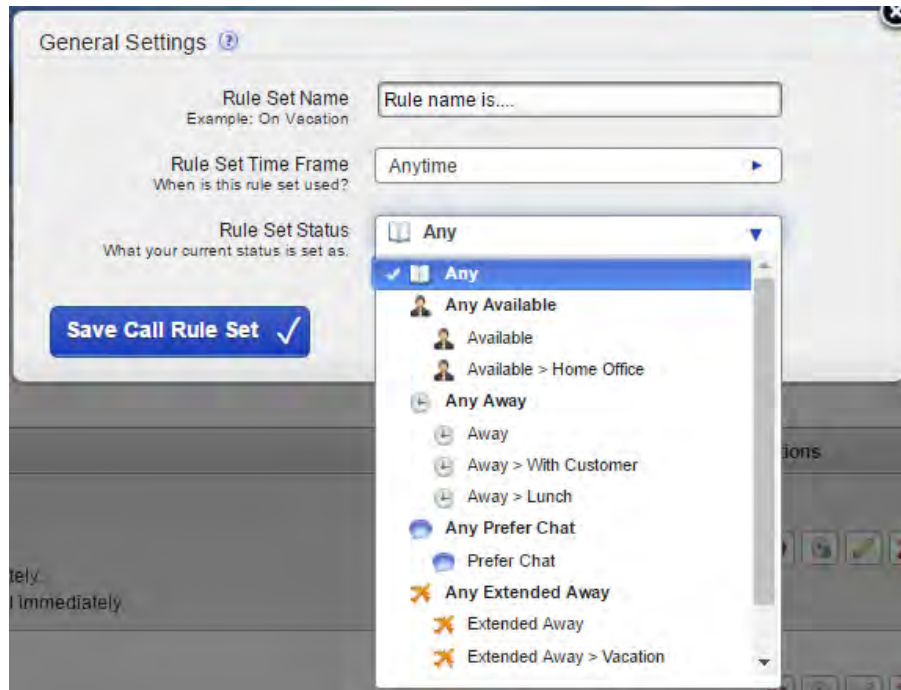


Create New Unanswered Call Rule:

- After clicking “Create Call Rule Set,” the general settings window will appear.
- Set the name of the rule, and set the time frame that you want the rule to be in effect.



- Set the Rule Set Status to what you would like your status to be when the call rule is in effect. (I.e. If you want the rule to be in effect when you are on vacation, select “Extended Away > Vacation.”)
- Click “Save Call Rule Set.”

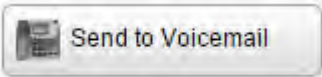
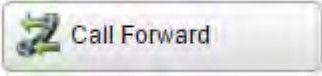
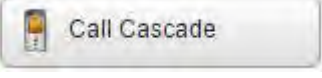

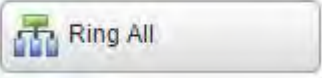
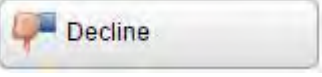


- Next, you will have to set the actions that the call rule will take when activated.

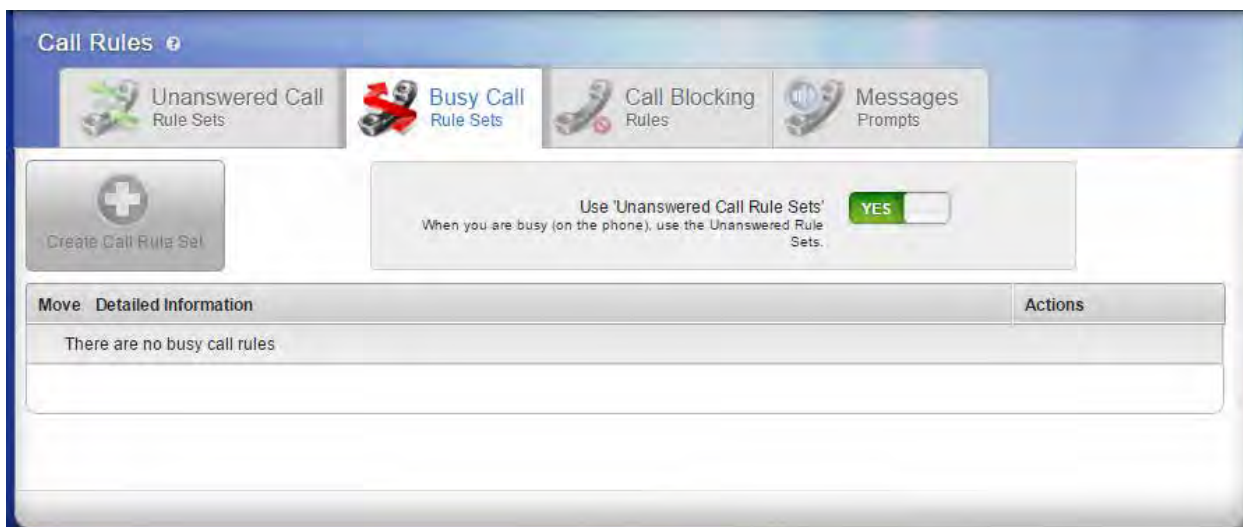


- Click "Create Action," or you can also click the settings tab to change the general settings.
- **NOTE: WHEN SETTING ACTIONS, DO NOT CHOOSE ALL CALLS! CHOOSE ONLY DIRECT CALLS, OTHERWISE ALL INCOMING CALLS WILL BE SET TO THAT RULE!**

Actions List:

-  Choose what type of call, and how many rings, if any, and click **"Save Action."**
-  Choose the type of call, the extension to forward to, and how many rings before the action takes place, then click **"Save Action."** -For internal use ONLY
-  Choose type of call, the extension(s) to ring to, how many rings, if you want to preserve the caller ID, and if you want the call to be acknowledged, then click **"Save Action."** -You can use this for EXTERNAL numbers as well.
-  Choose type of call, the Secret Code to prompt for (this code will have to be entered for the call to go through), how many rings until prompted for code, number of tries allowed to for code, and what action is taken if code is incorrect (I.e. busy signal, hang up). Then click **"Save Action."**
-  Choose type of call, which numbers to ring (numbers will be added to list), the number of rings, and if you want attempt to preserve Caller ID. Then click **"Save action."**
-  Chose the type of call, number of times to ring before declining or starting silent rings, and the number of rings to play direct callers. Then click **"Save Action."**

Features > Call Rules > Busy Call:



The screenshot shows the 'Call Rules' configuration page. At the top, there are four tabs: 'Unanswered Call Rule Sets', 'Busy Call Rule Sets', 'Call Blocking Rules', and 'Messages Prompts'. Below the tabs, there is a 'Create Call Rule Set' button with a plus icon. A toggle switch is labeled 'Use Unanswered Call Rule Sets' with the text 'When you are busy (on the phone), use the Unanswered Rule Sets.' and is currently set to 'YES'. Below this is a table with columns 'Move', 'Detailed Information', and 'Actions'. The table content is empty, displaying 'There are no busy call rules'.

- Busy call rules act the same as the unanswered called rules. So much that, you can copy the settings from unanswered to the busy call settings by clicking **"yes"** on the **"use unanswered call rule sets."**

Call Blocking Rules:

- To block calls from a specific phone number or prefix, click the "Call Blocking Rules" tab, and click "Create Call Block Rule."

Block Rule Settings ?

What to block Phone Number ▼

Number to block

Block and send to Play Busy Signal ▶

Save Action ✓

- Choose what to block, (Phone Number or Prefix.)
- Type the number or prefix that you would like blocked.
- Choose what to do with the blocked call, (Play Busy Signal, Play Congestion, Hang Up, or Send to Voicemail.) Click "Save Action."

Messages Prompts:


- This tab is for the recordings of the prompts for when a secret password is required. These can be changed if necessary, though Unitel recommends that these be left alone.

Message to Prompt	Description of Default	Actions
Secret Code Enter Password	"Please enter your password followed by the pound key."	
Secret Code Wrong Password	"Password incorrect. Please enter your password followed by the pound key."	

Features > My External Contacts:

- You can add external contacts to be listed under your Contacts list or Rapid Dial List (Favorites)
- Click “**Create External Contact**”



- Enter the **First Name**, **last name**, Jabber ID (If you are integrated with Jabber, otherwise, leave blank) or enter the **Business name**.
- Change the label to **business**, **mobile**, **home**, or **other**.
- Enter the **contacts number**.
- Click the  **Add number** button to add another number to the **contact** or click **submit**.

Default	Label	Number
<input type="radio"/>	Business	123-4567

- Once the external contact is created, go to your **Rapid Dial List** and click “**Add External Contact**”
- External contacts must be entered in 1 at a time. Each user can have up to 100 contacts and 100 favorites IN ADDITION to pre-loaded system extensions.

Features > Conference Room:

- Conference Room enables you to set up a multi-line phone call with internal extensions, and external phone numbers.
- To begin, you need to choose a **5-digit** number that only the members of the conference room should know to join.
- You can set if you would like a sound to play when someone enters or exits the call, and choose the sound to be played.
- Turn on/off Music on Hold when only one person is in the group.
- Members may press # to be sent to an extension, and choose the extension.

- Search for what members you would like to choose as administrators, and add them to the list.
- Use the admin settings to choose how the meeting is ran.
 - Only allow conference admins to talk.
 - Hang up conference when all admins leave.
 - Users cannot talk unless a conference admin is present.
 - Click “**Save Conference Room Settings.**”

Features Voicemail / Fax Reporting Switchboard ✓

Conference Room

✓ Successfully deleted your conference settings

General Settings

Your Conference Room Number 5 digits

Play sound when people enter/leave NO

Sound Type

Play Music On Hold when only 1 member is in the conference NO

Conference members may press # and be sent to extension

Conference Admins

Type to Search

Ext	Name	Type

Admin Settings

Only allow conference admins to talk NO

Hang up conference when all conference admins leave NO

Users can not talk until a conference admin is in the conference room NO

Save Conference Settings ✓

Using your “Meet Me Conference” Room:

- For **INTERNAL** callers, enter the “Meet Me Conference” extension that was setup by **Unitel** into the phone(s) that you added into the conference admins list.
 - Your **Meet Me Conference Extension:** _____

- Then, enter the **5-digit number** that you created in your conference room and **press #** (If you have the “Users cannot talk until a conference admin is in the conference room” toggled to **Yes**, this will make you the **admin**, and others may join the conference.)
- For **EXTERNAL callers**, enter the phone number of the “Meet Me Conference” that was setup by Unitel.
 - The **Meet Me Conference phone number**: _____
 - Then, enter the **5-digit number** that you created in your conference room and **press #** (If there is no admin, and the “Users cannot talk until a conference admin is in the conference room” toggled to **Yes**, the caller will not be able to join)

Features > Phone Features:

- Here you can change the Phone Settings, Ringtones, Ring Rules, and set your Rapid Dials, (Favorites).

The screenshot shows the 'Phone Features' configuration page. The top navigation bar includes 'Features', 'Voicemail / Fax', 'Reporting', and 'Switchboard'. The main content area is titled 'Phone Features' and has four tabs: 'Phone Settings', 'Ringtones', 'Ring Rules', and 'Rapid Dial Favorites'. The 'Phone Settings' tab is selected.

Below the tabs, there are two sub-sections: 'Digital Phones' and 'Other Manufacturers'. The 'General Settings' section includes a 'Line Label' field with the value 'EXTENSIONS', an 'Actual Display' field with the value '3408', and a 'Build dynamic line label with variables' checkbox. There is also a 'File Name' field and an 'Append' button.

The 'Miss Button' section has a 'Miss Button Action' dropdown set to 'Open Visual Voicemail', a 'Require Numeric Password' checkbox, and an 'Account Extension' field.

The 'Idle Screen' section includes a note about image dimensions, a preview of an image, and a 'Display Missed Calls Notification' checkbox set to 'YES'.

The 'Display' section has a 'Brightness' slider set to 5, a 'Backlight Dimming' checkbox set to 'YES', a 'Seconds until Backlight Dim' field set to 30, and a 'Backlight Dim Level' slider set to 2.

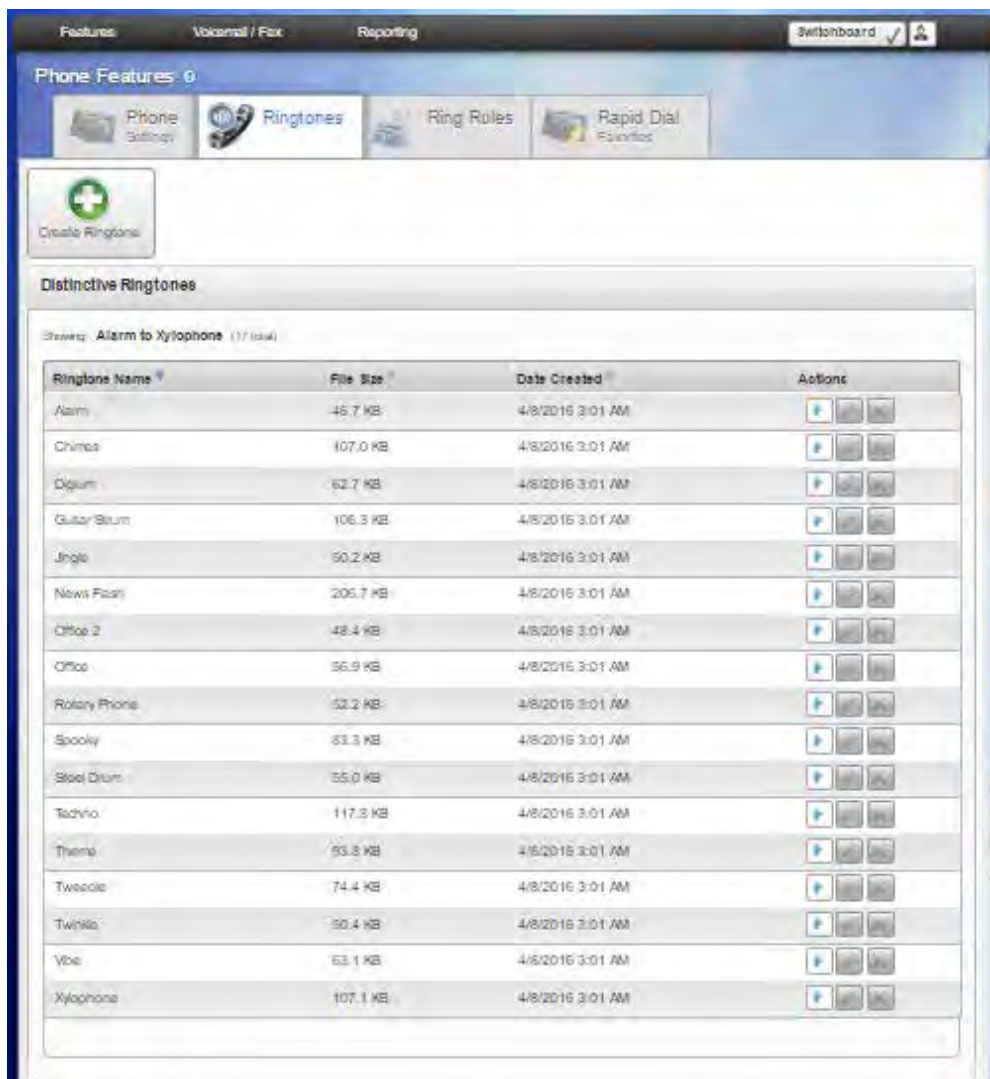
The 'Sounds' section has a 'Default Ringtone' dropdown set to 'Digital', a 'Reset Volume Entry Call' checkbox, and a 'Play Call Waiting Tone' checkbox set to 'YES'.

The 'Answering Calls' section has a 'Hooked Answer' checkbox, an 'Electronic Hook Switch' dropdown set to 'Automatic', and an 'Auto-answer Switchboard Initiated calls' checkbox set to 'YES'.

At the bottom of the page, there is a 'Save Phone Settings' button with a checkmark.

Phone Features > Phone Settings:

- General Settings
 - Change your Line Label to read something other than your extension.
- Msgs Button
 - Msgs Button Action – Open Visual Voicemail, or Dial Voicemail Extension.
- Idle Screen
 - Set the PNG file that you would like to have as a background, and if you'd like missed calls to be displayed.
- Display
 - Set the brightness, backlight dimming, how long until the backlight dims, and how much you would like it to dim.
- Sounds
 - Set the default ringtone, reset the volume level after every call, and play call waiting tone.
- Answering Calls
 - Set if you are using a headset or not, change the electronic hook switch, and set up auto-answer Switchboard initiated calls.
- Click **"Save Phone Settings."**



Phone Features > Ringtones:

- There are 17 pre-loaded ringtones you can choose from, and you can also upload your own.
- To upload your own, click "Create Ringtone." The file must be a .wav file.

Create Ringtone [?](#)

Choose a .wav sound file from your computer to upload and name it.

Choose a File

Name

Save Ringtone ✓ **Cancel** ✓

- Choose the file, and name the file.
- Click "Save Ringtone."

Phone Features > Ring Rules:

- Ring rules can be set to ring standard, automatic answering, ring then automatic answer, and visual indication.
- A common programming user will do here is creating a ring rule to have internal calls ring tone different from external calls (see end of page 21 for step by step instructions)

Features Voicemail / Fax Reporting Switchboard ✓

Phone Features [?](#)

Phone Settings Ringtones Ring Rules Rapid Dial Favorites

Create Ring Rule

Using 0% of available space for ringtones (0 kb of 1024 kb)

Used (0 kb) Free (1024 kb)

Move	Rule Name	Ring&Conditions	Actions
There are no ring rules.			

Ringing Settings [?](#)

Rule Name

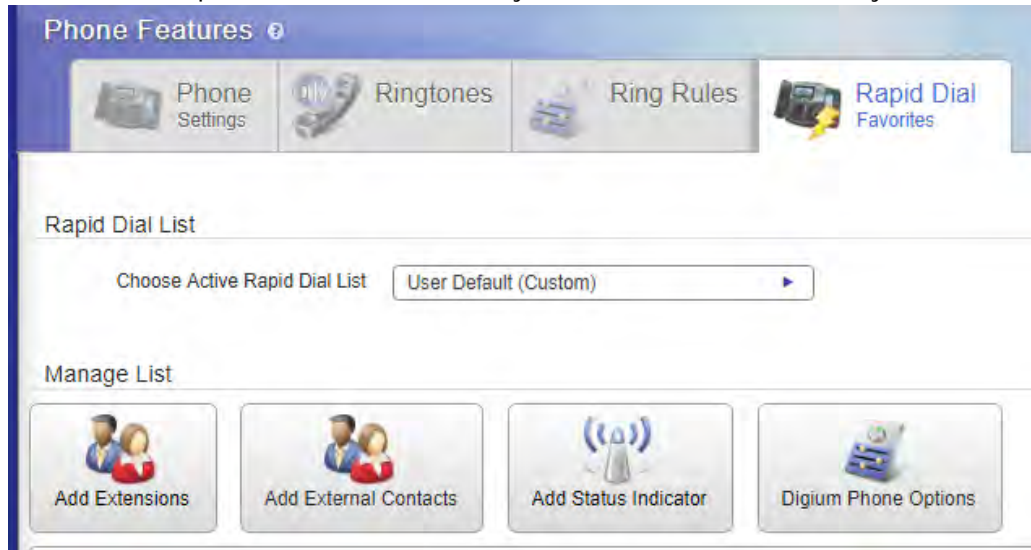
Ring Type

Ringtone

Save Ring Rule ✓

Phone Features > Favorites:

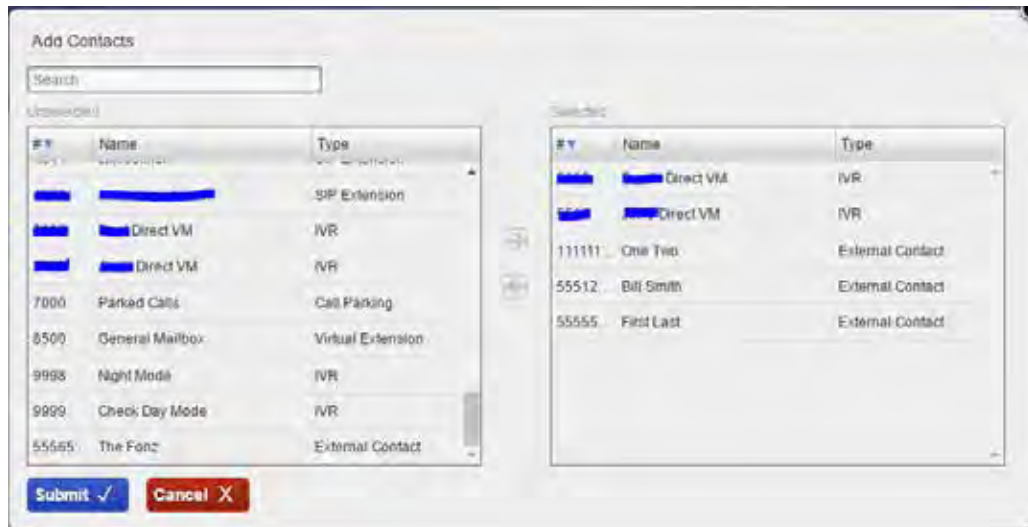
- Rapid dials are used as speed dials. You can add any internal or external number you wish.



- **Be sure to choose "User Default (Custom) as your Active Rapid Dial list**
- To add extensions, click "Add Extensions." The window seen below will appear.



- The list will contain every **extension** in use within your Switchvox system. Simply click the extension you would like to add and click the arrow over. Once you click the arrow right bottom, the list will begin to populate.
- **To Alphabetize:** in the right-hand column of your selected extensions, click "Name" column header
- Click **Submit**.
- Once the list populates, you can click and drag using the **green arrows** on the left side of each entry into whichever order you please.
- You can also add external contacts to your Rapid Dial list, though they must be first entered under **Features > My External Contacts**.



- Refer to your phones user manual to access your **Rapid Dials (Favorites)**.

Features > 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 a Time Frame's conditions. Not all of the rules have to match.



- Type the name, and click create. Inside the next window, you can create the time conditions.



Features > Status Options:

- Status options allows you to customize your status. There are 9 pre-loaded statuses that cannot be edited or removed. To create a custom option, click “Create Status Option.”

Full Status	Owner	Actions
Available	System	[Edit] [Delete]
Available > Home Office	System	[Edit] [Delete]
Away	System	[Edit] [Delete]
Away > Lunch	System	[Edit] [Delete]
Away > With Customer	System	[Edit] [Delete]
Prefer Chat	System	[Edit] [Delete]
Extended Away	System	[Edit] [Delete]
Extended Away > Vacation	System	[Edit] [Delete]
Do Not Disturb	System	[Edit] [Delete]

- Pick the status to customize, then add the sub status, then click “Save Status Settings.”

Status Option Settings

Status:

Sub-Status:

Save Status Settings ✓

Features > Additional Phones:

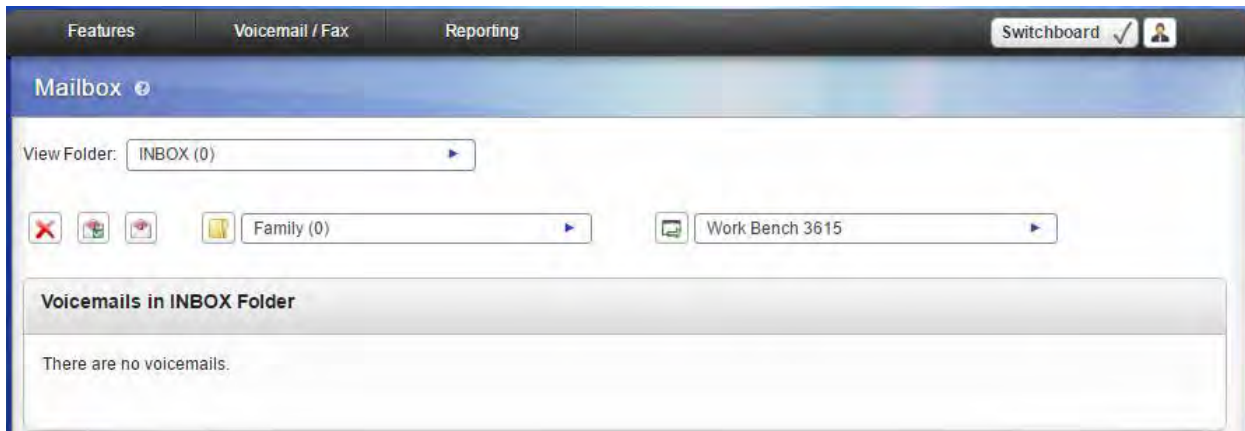
Additional Phones			
Showing: 1 to 2 (2 total)			
Number / Extension	Label	Transfer Key	Actions
5555 - Softphone Demo	Main Extension	1	[Edit]
5556 - Softphone Demo : Demo : Softphone	Demo : Softphone	2	[Edit]

- Each of your phones has a label, so that it can be identified in your Call Rules.

- Acknowledge Rapid Transfer
 - **Yes**, indicates that you want to accept the call before Switchvox completes the call.
- Label
 - A name for the phone, for easy reference
- Rapid Transfer Key
 - The number to press on your phone's keypad to complete the transfer.

Voicemail / Fax > Mailbox:

- Your Mailbox lets you manage your voicemail and faxes in Switchvox.
- Your Switchvox Mailbox uses IMAP, a protocol that lets your desktop email application access remote messages as if they were stored on your computer. If you prefer to access your Mailbox from your desktop email, ask your Switchvox administrator for more information about how to do this.



Voicemail > Voicemail Options:

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

Voicemail Greetings:

- The **Recordings** and **Greeting Rules** tabs let you control what your caller hears when he or she arrives at your voicemail.
- Here is the simplest way to manage your voicemail greeting:
- Click **Create Recording** under the Recordings tab
- Select **Greeting** from the Recording Type

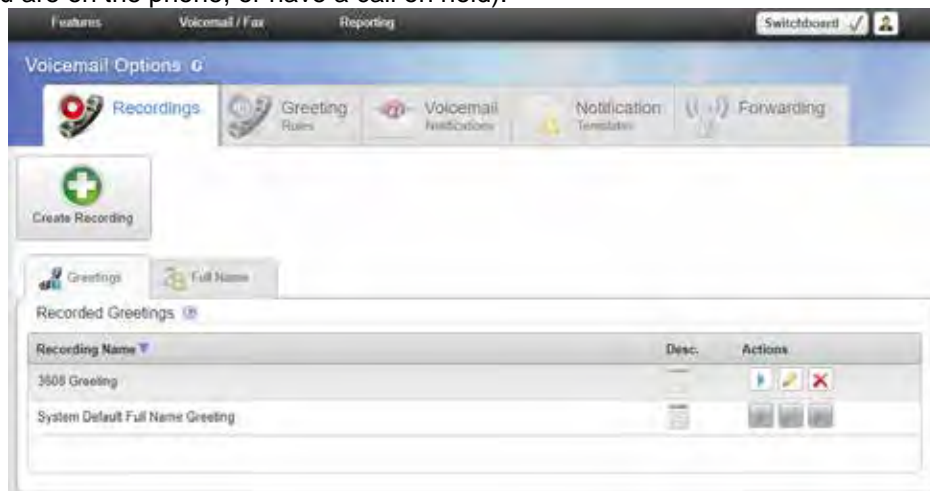
- Upload a file, or make a recording over the phone
- Toggle **YES** for Default Rule's Unavailable Greeting
- Toggle **YES** for Default Rule's Busy Greeting
Switchvox will always play that recorded greeting when a caller reaches your voicemail.
- You may also want to make a **Full Name** recording, which Switchvox uses in your company directory.

Recordings:

- Recordings include:
- 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 gsm), or recorded over your phone.
- To specify which of your recorded greetings play when a caller reaches your voicemail, use a Greeting Rule.

System Defaults:

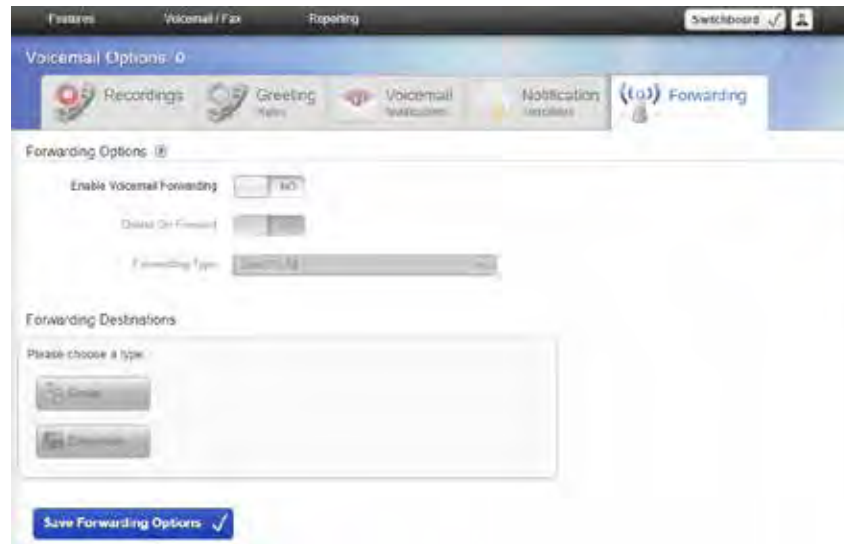
- If you have not created and specified a recorded greeting, Switchvox includes your full name recording in the system default. If you do not have a full name recording, Switchvox's system voice reads your extension digits. The system default is your full name recording (or your extension digits), then the system sound "is unavailable" or "is on the phone." That depends on whether or not you are busy (on the phone, or have a call on hold).
- Greeting Rules
- Greeting Rules determine which recorded greeting plays when someone reaches your voicemail.
- The Default Rule determines what greetings play most of the time. If you want to play a different greeting depending on the time frame and/or your Status, create a new greeting rule. It will be listed above the default rule, so that those greetings are played under those particular circumstances, otherwise the default greetings are played.
- In the greeting rule, you can set a Busy Greeting. That is played when your extension is busy in some way (you are on the phone, or have a call on hold).



Forwarding

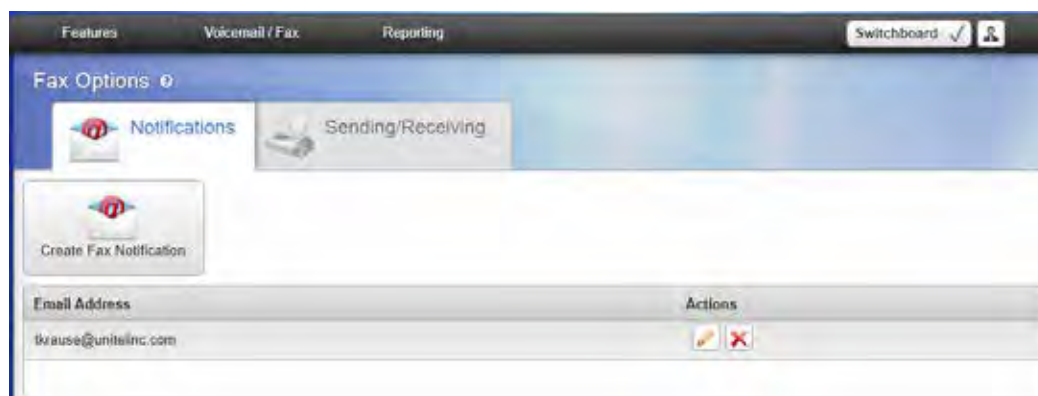
- You can automatically forward all of this extension's voicemail messages to other extensions in Switchvox. This is helpful for generic extensions such as 'Accounting,' or 'Shipping,' or for queue extensions such as 'Customer Service.' Callers can leave a message on one extension, then the message is forwarded to the appropriate people. This is also useful internally, if you want to send a message to everyone in a group.
- You can forward messages to an Extension Group, or to extensions. Choose one, and then add the groups or extensions to the collection.

- To delete each message from this extension's Mailbox after the message is forwarded, set Delete on Forward to YES.
- 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. If you are using Extension Groups, the groups are used in the order they are listed in the collection, and in the order given within the group itself.



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.
- You must install a fax license and the fax software to make faxing available.



Sending and Receiving

- These options control faxing for this extension.
- Treat All Outgoing Calls as Faxes
- Yes, indicates that this extension is actually a fax machine and won't make any voice calls. Switchvox handles all outgoing activity as a fax:

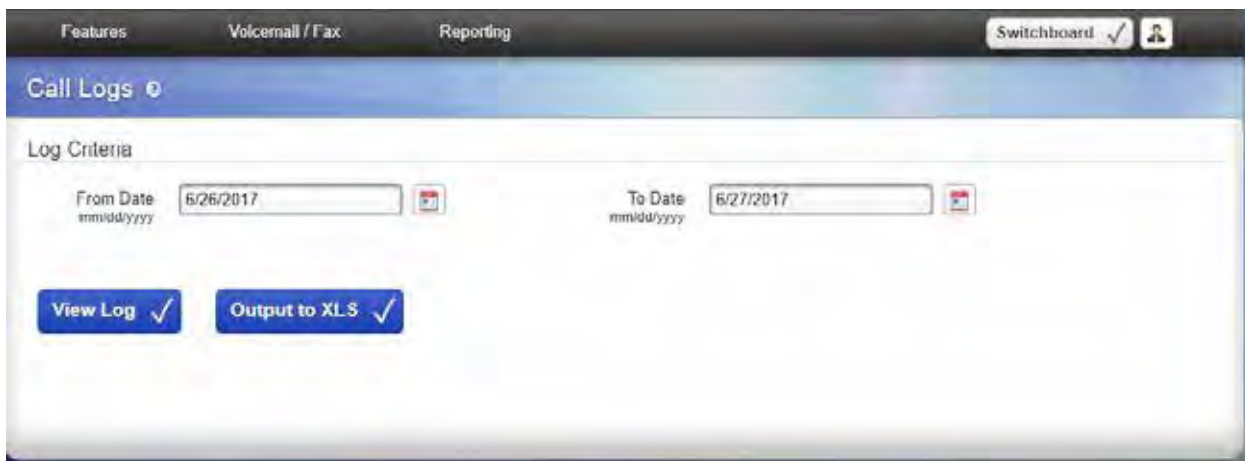
- Print a fax-file
- Put it in the Fax.Outbox folder in the extension's Mailbox
- Send the fax
- **No** indicates that this extension may make voice calls and send faxes.
- Fax Header
- This Fax Header is included on each fax that you send. For example:
Digium, Inc. | 256.428.6000 | Fax: 256.864.0464
- This is the information that is printed along the very top of your fax pages (not to be confused with a cover page).



Reporting > Call Logs:

Call Logs

- A 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 Log to see the log within the browser window, or click Output to .xls file to download an xls file.
- The Log 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.
- To see all of the details that Switchvox has for a call, click a call's Details icon.

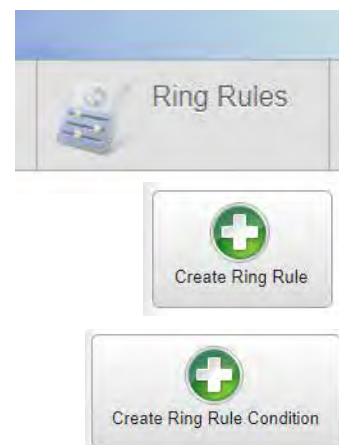


Call Reports:

- 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.
- Depending on the information that you are interested in, a chart can be a great way to see your data. But, charts are only available for one field at a time.
- **Talk Time** is the time that this extension actively spent with the call.
- **Call Time** is the time for the entire call. For example, this call may have waited in a queue for 5 minutes before ringing this extension and talking with the extension-owner.

Ring Rules >Distinguishing Internal vs. External ring tones:

- Under “Features” select “Phone Features”
- Select “Ring Rules” tab
- Click “Create Ring Rule” button
- Rule Name: title “Internal Calls”
- Ring Type: Leave at “Standard Ring”
- Ringtone: *select ring tone of your choosing*
- Then select “Create Ring Rule Condition” button
- Select “Call Type” button
- Click drop down to select “internal Calls” >Save Condition



To Record an "out of Office/Vacation" voicemail message and assign to status"

- Select "voicemail /Fax"
- Select "Voicemail Options"
- Select "Create Recording:
 - Recording Type: *select greeting*
 - Name: *you could title it for example: "Vacation 7/4/19"*
 - Description: *this is where you could type in script for greeting*
 - Recording source: *select Record over phone*
 - Extension to ring: *select the extension you wish to record this at (your own most likely)*
 - Select **"Ring Extension" - this will ring your phone and have you record after the tone**
 - Press "Done"
 - Then select the greeting to be Default Unavailable /or Default Busy greeting
- Then select the "Greeting Rules" tab
- "Create Greeting Rule"
 - Rule Name: Example - *Vacation, Away with customer*
 - Status: *select the status that your phone will need to be in in order for your new greeting to play*
 - Time Frame: *"Anytime" is usually the standard*
 - Then select the drop down for either the Unavailable or Busy Greeting
 - **Click Save Greeting Rule**

**** your new greeting is now saved under your recordings; all you will need to do to activate it will be to put your desk phone in the chosen status.**

Forwarding your desk phone to another extension or cell phone:

- Select "Features"
- Select "Call Rules" > "Unanswered Call" tab
- Click **"Create Call Rule Set"**
 - Rule Set Name: *you could name this "forward to cell"*
 - Rule Set Time Frame: *select "Anytime"*
 - Rule set Status: *this is the status you will put your phone in in order to activate forward*
 - Click "Save Rule Set"
- Select **"Create Action"**
- This will bring up the Actions List -you will then select "Call Cascade" (if you wish to forward to cell) or "Call Forward" (to forward to internal extension)
 - Type of Call: select Direct (ALWAYS SELECT DIRECT)
 - Number to forward to: *enter in cell phone number as you would dial it*
 - Number of times to ring prev. rule: *select # of rings before it forwards*
 - Attempt to Preserve caller ID: swipe to "Yes"
 - Acknowledge Call: *No*

LAST STEP: Go back to Features > Call Rules -your new call forward rule will be listed at the bottom In order to activate, use the green arrow and drag it to the top of the list. Remember to set your desk phone to chosen status in order to turn on forwarding.

