

Hosted PBX



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Important Information:

Everything needs an extension number so the system knows where to point calls to.

Examples: Extension 101

Voicemail 88101 (88 + extension number)

Main Queue: 3000's

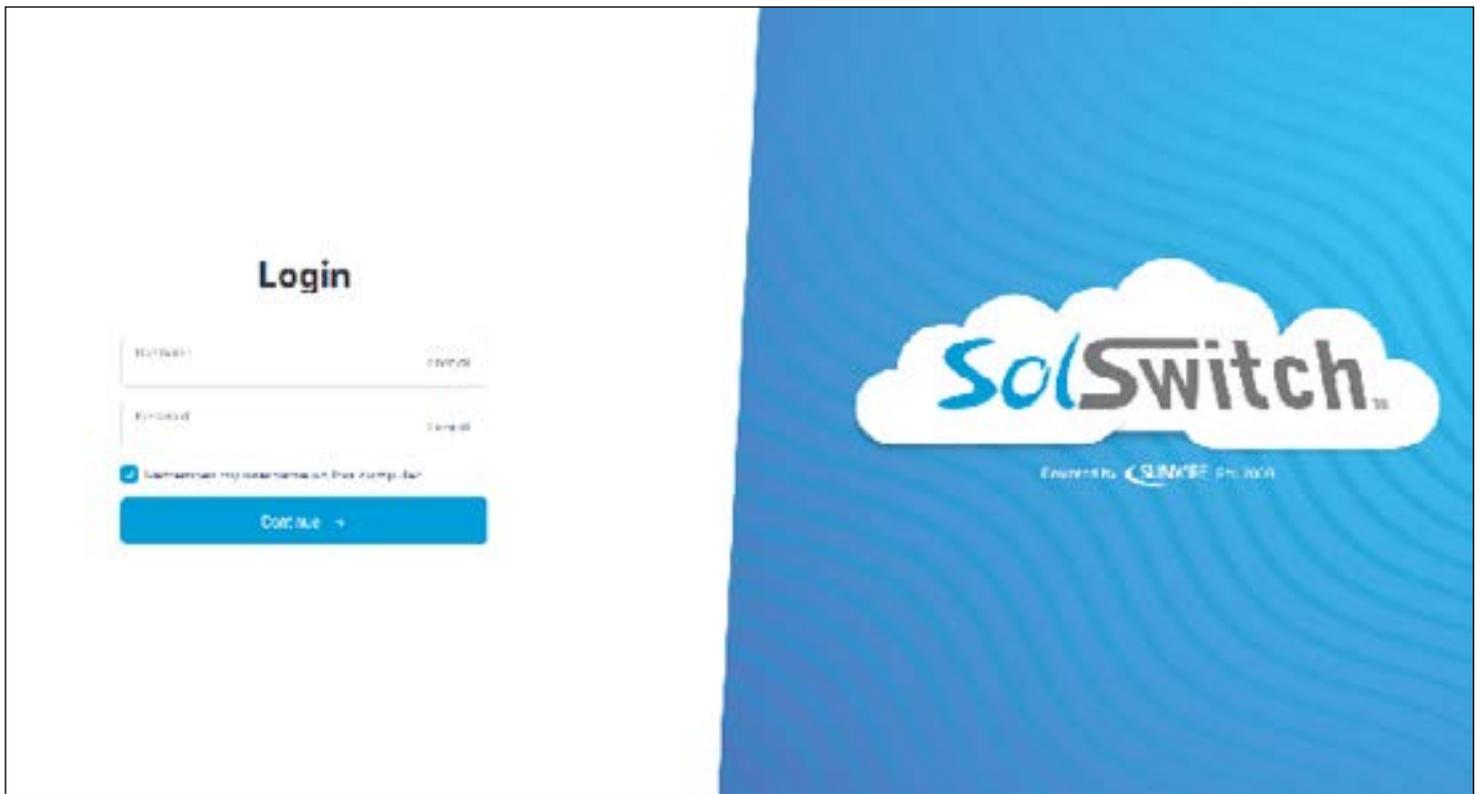
IVR's 4000's

Portal / Desktop

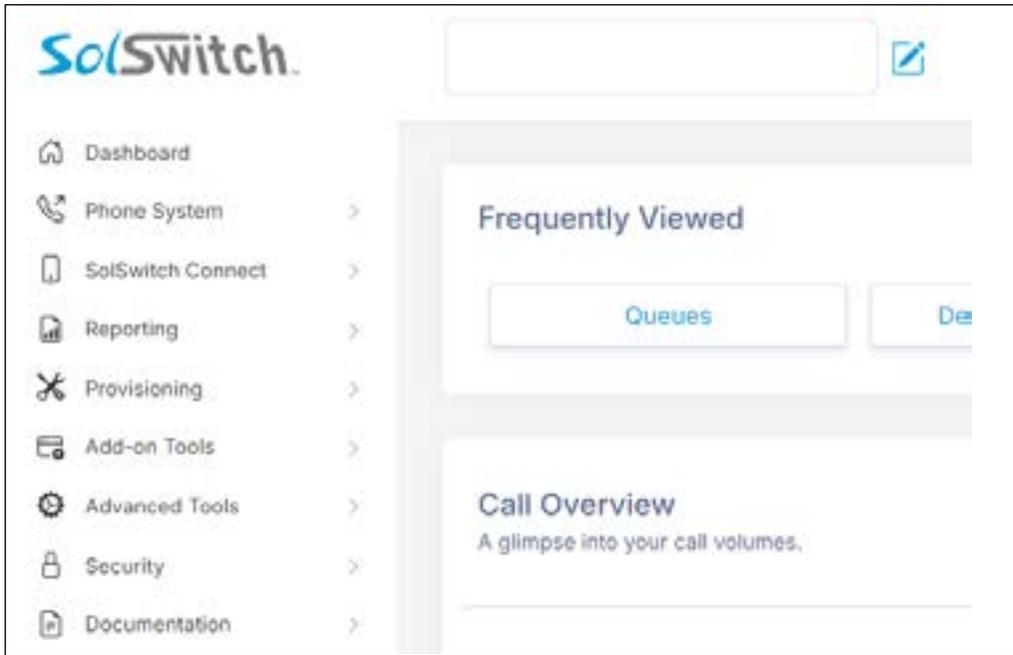
To log into the user portal go to: <https://hpbx.wightman.ca> (in your address bar)

Tip: For easier access please save this as a favorite in your browser.

Use the user name and password given to you by our Wightman Technician on site.

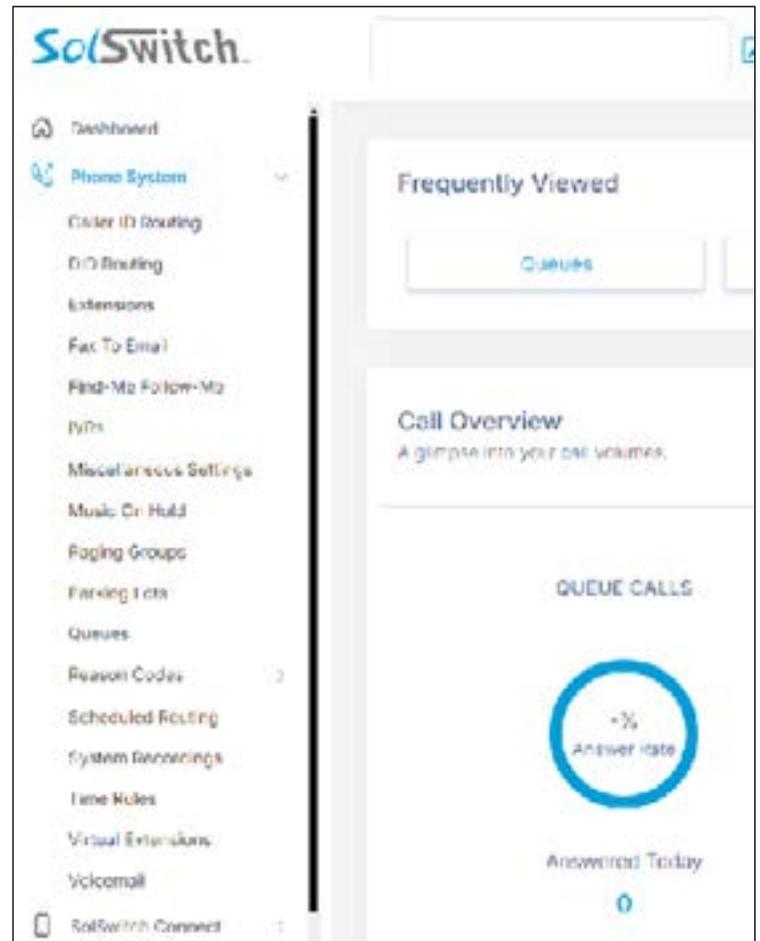


Once logged in your screen should look like this:



Main Menu image

Phone System Settings image:



Caller ID Routing Details:

Configure your system so that when a specific number calls in, the call gets directly to the Destination of your choice.

To Add a new Caller ID Routing click, Add CID Routing

Enter the Caller ID or Prefix (click on the Orange 'I' for more info)

Direct Inward Dialing (DID) Routing:

This section allows you to route incoming calls based on the digits dialed. In order for a call to be routed by DID the "Use DID Table" option must be selected on that trunk.

This only applies if you subscribe to DID (additional DID's)

Extensions:

Extensions are assigned to agents/employees of the phone system and can be spread across multiple telephone sets. To create a new extension, click the 'Add New extension' button or click the 'Edit' icon next to an existing Interactive Voice Response (IVR):

Add a new extension. Wightman Staff can assist to create a new extension

Info: View details on an existing extension,

Edit: Name, Phone Number, Email address (click on the Orange 'I' for more info)

*also see: How to Edit Name on a phone extension.

Note: Remember to click 'Save Extension Settings' if you want changes saved.

Find-Me Follow-Me:

The SolSwitch has the ability to look for a user by calling a succession of extensions or numbers while keeping the incoming call on hold. You can have as many find-me numbers as you like. Click the 'Add New' button to get started.

To edit existing click Edit

To add New Click 'Add New'

Interactive Voice Response (IVR):

IVR, also known as auto attendant, is a computerized phone system that enables a person, typically a telephone caller, to make a selection from a voice menu. The selection is made using touch-tone keypad entries. The phone system plays pre-recorded voice message and the person on the call typically presses a series of digits on the telephone keypad in order to select the correct option associated with the voice prompt.

To Create an IVR, Click 'Add New IVR'

Enter the Extension Number (if you have an existing IVR add 1 to the number. 1000, 1001, etc)

Select a Name for the IVR (example: Winter Hours)

System recording has to be created before it can be added. (see System Recording, under Phone System Settings)

Miscellaneous Settings:

Not currently in use

Music on Hold

Music on Hold is the music that callers will hear when they are put on hold or parked.

Three options are available for music on hold:

- 1: The default system is preloaded with royalty-free music.
- 2: Streaming music from the Internet in the form of MP3.
- 3: A custom playlist which supports MP3 and WAV files.

To Add a New Music on Hold, click add a 'New MoH Item'

note: Copyright Laws may apply

Paging Groups:

Paging Groups can be set up to target specific persons or positions within the phone system. For example, if a caller is looking for a sales representative, but no one person in particular, a page can be sent to the sales team only.

To Add a new Paging group click 'Add Paging Group'

To Edit an existing Paging Group click Edit

To Delete an existing Paging Group click Delete

Parking Lot Details:

Configure your parking lot details such as what extensions you would like reserved as parking spaces as well as the reminder time interval setting.

Options:

Reminder Interval: The length of time in seconds before an agent is reminded they have a parked call still waiting.

Reminder Type: Whether to remind or ring back a parked call.

Expiry Time: The length of time, in seconds, that a parking lot will remain unavailable after picking up call. During this time, if the picked up call is parked it will return to the same parking lot.

Queues:

Queues follow rules for inbound calls they are used as a way to handle incoming calls. Below is a list of current queues. Many options are made available so that incoming calls are handled exactly as you need them.

Please see Drop-Down in SolSwitch for more details

Reason Codes:

Click 'Create Busy Reason Code' to get started, or Click Edit to edit an existing code

Once finished click 'Save Busy Code'

To Create a Busy Reason Code Click 'Call Reason Codes', and select 'New Reason Code'

Scheduled Routing:

Enables you to Manage your scheduled route details.

Click 'Add Scheduled Route' to create or edit existing scheduled routes

System Recordings:

MP3 audio files of IVR or Queue greetings, product announcements, company news, business hours, etc are uploaded here. To record or modify a system recording using a telephone, you will need the star code associated with the recording you would like to change. The exact star code (*101xx) for each recording is generated by the system once a system recording entry has been created. Click the 'Add New Recording' button to find out more.

Time Rules:

Time rules are used by the SolSwitch to direct calls to the appropriate extensions, virtual extensions, queue, IVR, ring group, etc. during the specified times as per the created Time Rules. For example, if your business is open from 9 to 5 on weekdays and closed all other times, you could create a rule so that 9 to 5 calls go to an IVR or ring directly to a certain extension. If someone calls outside of those hours, those calls could be forwarded directly to voicemail or to another number, such as an answering service.

Virtual Extensions:

A virtual extension allows you to create an extension number and attach an outside telephone number to that extension. Therefore, in order to reach an external number; internal users would simply need to dial the appropriate extension.

Click 'Add Virtual Extension' to Add a new Virtual extension

You may also Edit, or Delete virtual extensions by clicking the appropriate link

Voicemail:

Voicemail on the SolSwitch is treated as a standalone feature. Each voicemail is given its own extension number so that it can be used in any way needed. While each voicemail has it's own extension, it must also point to a Mailbox ID; which is the actual phone extension associated with that particular voicemail.

You can choose from Info, Edit, Manage, or Delete.

How To Change a Name:

You need to change a name on a phone/extension in 4 places

1) Under Phone System Settings Click EXTENSIONS

- Select EDIT on the desired Extension you wish to change
- Change name under NAME field
- Change the email address under RECORD EMAIL NOTIFY
- Then click SAVE

2) Under Phone System Settings Click VOICEMAIL

- Select EDIT on the desired extension you wish to change
- Change name under NAME field
- Change the email address under EMAIL to new email address
- Then click SAVE

3) From Main Menu click VOIP PROVISIONING

- Select SIP ACCOUNTS
- Select EDIT on the desired extension you wish to change
- Change the DESCRIPTION field to desired new name
- Then click SAVE SIP Account Settings

4) From Main Menu click VOIP PROVISIONING

- Select DEVICE PROVISIONING
- Select EDIT on the desired extension you wish to change
- Change the SCREEN NAME under the Handset Specific Config area
- IF phone hasn't been plugged in select SAVE or if it's already plugged in select SAVE AND APPLY TO DEVICE

NOTES:

How to Record a Phone Call:

MAIN MENU > PHONE SYSTEM SETTINGS > EXTENSIONS

- Find the extension you wish to setup and select EDIT
- Under RECORD CALLS select ON DEMAND
- other option in drop down is ALWAYS which records all calls
- Input the preferred email you would like calls to be forwarded to under

RECORD NOTIFY EMAIL

- Click on SAVE EXTENSION SETTINGS at bottom of screen

Once saved the operator will have to press #1 while on a call to have call recorded and sent to the desired email

NOTES:

How to Retrieve Recordings in Solswitch:

MAIN MENU > REPORTING & MONITORING > CALL DETAIL RECORDS

- Select the date range you wish to look up the phone call in question
- In SOURCE NAME/# put in the extension you wish to look up
- In RECORDINGS ONLY select yes or no if you want to specifically look for recordings or all calls
- Click on SEARCH to get results
- Press the + button on the left hand side of the screen to bring up the desired voice call recording
- Press PLAY ICON on right side of pop up to play phone call

NOTES:

