Packet8®
Internet Phone Service

Switchboard User Manual
Version 1.2
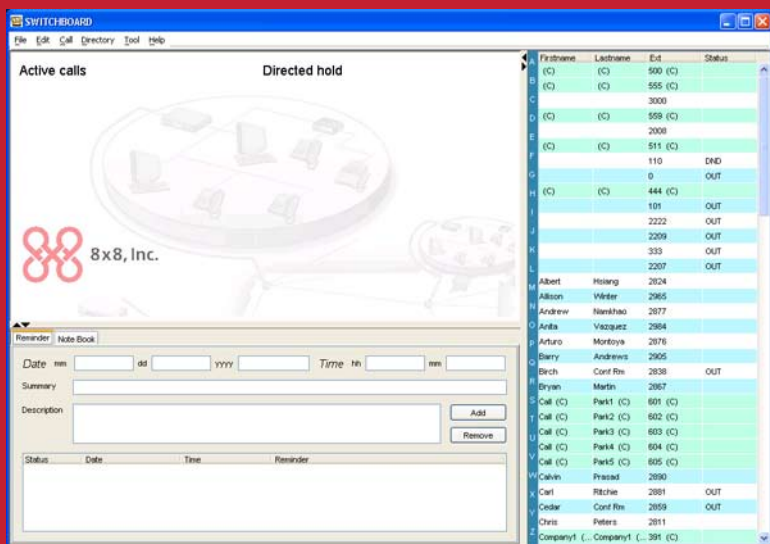
Operator Consol Software Application for Packet8 Virtual Office

Contents

Introduction

The Switchboard Application is an optional receptionist/operator console software application for Packet8 Virtual Office that will increase the efficiency of your organization with better phone call management. Switchboard allows:

- » Multiple call viewing and handling
- » Direct transfer to extension's Voicemail
- » Supervised call transfers
- » View of extensions' status

The Virtual Office switchboard is flexible and easy-to-use. It does not require advanced computer applications knowledge or experience. With a few clicks of a PC's mouse, a receptionist can transfer a call, put a caller on hold and announce the caller to an intended recipient or search the organization's directory.

System Requirements

To operate your switchboard, you must have the following requirements on your computer:

> Windows 98, NT, 2000 or XP operating system
> 128 MB of RAM
> 200 MB of free disk space
> 10/100 Base-T Ethernet connection

Getting Started

Upon subscribing to the Switchboard application, you will be provided a link to the software within your confirmation letter. The confirmation letter also provides step-by-step download and installation instructions to guide you through the Switchboard installation process.

Installation

The Switchboard application must be installed on the local computers that will be using the Switchboard Application before the Switchboard will work. Additional con-current Switchboard subscription licenses must purchased for any additional number of con-current Switchboard sessions that will be run on different computers. A user can install Switchboard on several computers and share one subscription license as long as only one concurrent session is running. Follow the instructions to install and set up the Switchboard Application.

Using Switchboard

To run the Switchboard application follow the instructions below:

Double-click on the Switchboard icon.

Your user login screen will appear.

Image 1: Switchboard Login Box

On-Screen Organization

Image 2: The Switchboard Interface Screen

Window Display

The Switchboard window display is divided into three main areas:

Active Calls Area

» Use this section for call viewing and:
- Answering
- Holding
- Ending
- Transferring
- Announcing
- Directing to Voicemail

Within the Active Calls Area is the "directed hold" column, a place for the operator to see the current status of the calls in progress.

	Firstname	Lastname	Ext	Status
A				
B	Access (C)	VoiceMail (...	500 (C)	
C	Accounts	Payable	2827	DND
D	Albert	Hsiang	2824	
E	Allison	Winter	2965	○
F	Andrew	Namkhao	2877	
G	Anita	Vazquez	2984	○
H	Arturo	Montoya	2876	
	Auto (C)	Attendant (...	444 (C)	

Image 3: The Directory Listing

Directory Area

- » Each extension has 4 fields for:
  - Firstname*
  - Lastname*
  - Ext*

Directory Area

- » Each extension has 4 fields for:
  - Firstname*
  - Lastname*
  - Ext*
  - Status
  - Green Dot (extension in use)

Image 4: Reminder/Notebook Section

- DND (do not disturb)
- OUT (extension not in service)

*These fields can be sorted on screen.

- » Use this section to:
  - Easily locate extensions, names and status
  - Place internal call
  - Leave a Voicemail
- » Use this section to move active calls:
  - Transfer-
  - Announce (supervised) transfer
  - Direct to Voicemail

Reminder/Notebook Area

- » Use this section to:
  - Store messages for the organization
  - Make personal notes

Menu Bar

Switchboard's menu bar has six options (File, Edit, Call, Directory, Tool and Help) which gives you access to pull-down menus. These entries control all aspects of the application.

Note: *Command options in the menus and the Toolbar will only be highlighted or "live" when they are available and can be used in the current situation.*

1. The **File Menu** has controls for the reminder/notebook functions and permits program exit.
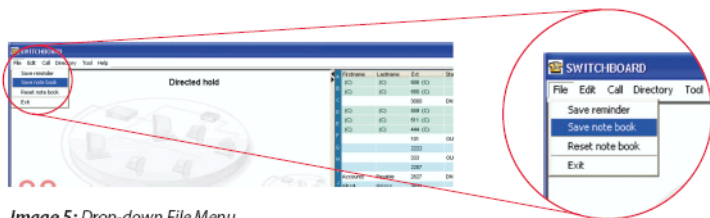

Image 5: Drop-down File Menu

Command	Description
Save reminder	Saves the reminder entry
Save note book	Saves the note book entry
Reset note book	Clears the note book entry
Exit	Closes the Switchboard Application

2. The **Edit Menu** provides standard cut, copy and paste functions and allows preference changes.

Image 6: Drop-down Edit Menu

Command	Description
Cut	Cuts selected text from the reminder/note book section
Copy	Copies selected text in the reminder/note book section
Paste	Sticks selected text into the reminder/note book section
Preferences	Options for configuration, layout and colors. (See page 13 for complete details.)

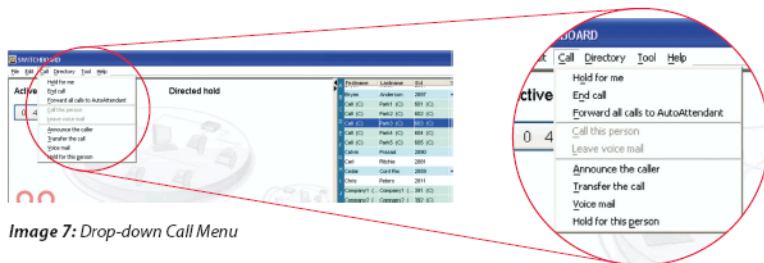3. The **Call Menu** gives options for a call: hold, transfer, forward, conference, Voicemail and end.

Image 7: Drop-down Call Menu

Command	Description	Keyboard Shortcuts
Hold for me	Places the selected call on hold	F1
End Call	Ends the selected call	F3
Forward all calls to Auto-Attendant	Forwards all incoming calls to the Auto-Attendant	F9
Call this person	Places a call to the selected directory entry	F7
Leave voicemail	Leaves a voicemail message for the selected directory entry	F5
Announce the caller	Calls the selected person and allows announcement of the incoming call, while placing the active call on hold	F2
Transfer the call	Transfers the call directly to the selected directory entry	F4
Voicemail	Accesses the voicemail box	None
Hold for this person	Places an incoming call on hold for a selected directory entry	None

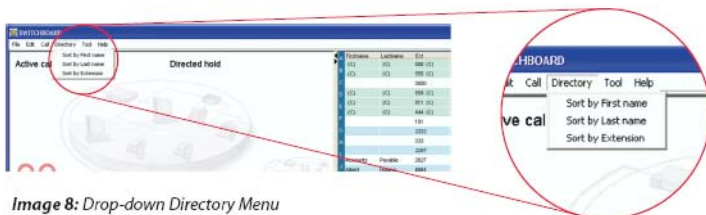4. The **Directory Menu** assists in sorting the organization's directory.

Image 8: Drop-down Directory Menu

Command	Description
Sort by First name	Changes the Company Directory to alphabetical ascending order, based on the entry in the **Firstname** column. The **Firstname** column will then appear first in the directory.
Sort by Last name	Changes the Company Directory to alphabetical ascending order, based on the entry in the **Lastname** column. The **Lastname** column will then appear first in the directory.
Sort by Extension	Changes the Company Directory to numeric ascending order, based on the entry in the **Ext.** column. The directory will list **Lastname, Firstname, and Extension** number across the screen.

5. The **Tool Menu** provides the ability to modify the appearance of the Switchboard display window and to show or hide tool bar buttons.
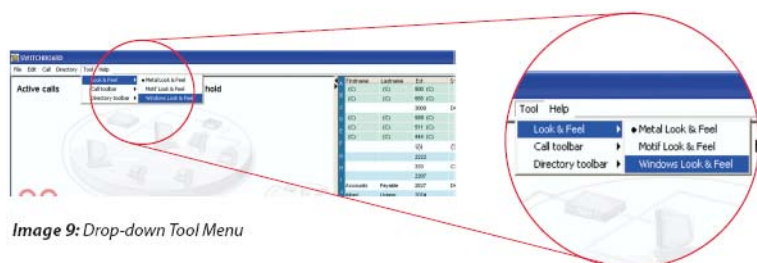

Image 9: Drop-down Tool Menu

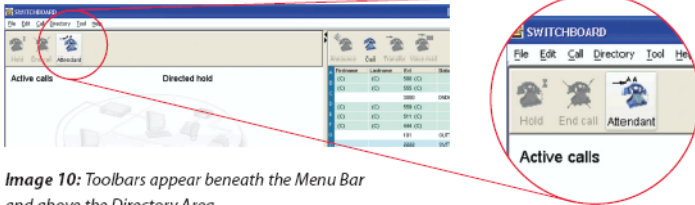| Command	Sub-Command	Description	Note
Look & Feel			
	Metal Look & Feel	Changes background colors	
	Motif Look & Feel	Changes background colors	
	Windows Look & Feel	All borders and frames are the standard Windows color. The text is the standard Windows font color and style.	Metal Look & Feel
Call Toolbar			
	Show	Shows the Call Toolbar buttons above the Active Calls Area.	The Toolbar buttons take up space at the top of the screen. It may be necessary to resize the "Reminder/Notebook" window to show all.
	Hides	Hides the Call Toolbar buttons.	
Directory Toolbar			
	Show	Shows the Directory Toolbar buttons above the Active Calls Area.	
	Hides	Hides the Directory Toolbar buttons.	

Image 10: Toolbars appear beneath the Menu Bar
and above the Directory Area.

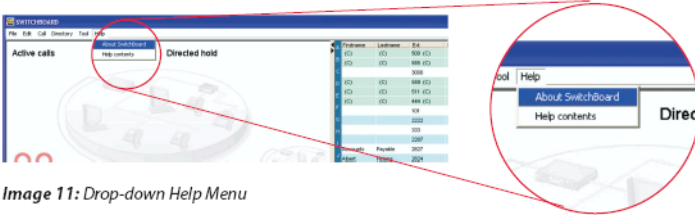6. The **Help Menu** has application information and tips for problem solving.

Image 11: Drop-down Help Menu

Command	Description
About Switchboard	Provides version details about the application.
Help Controls	Opens a browser that contains troubleshooting information.

Image 12: Online Help
Landing Page

Managing Active Calls

The Active Calls Area displays all active calls. A button appears on each call displayed, giving the switchboard operator options to answer, hold, transfer or end it. These incoming calls are listed top to bottom in order of appearance. In other words, the most recent calls are displayed at the bottom of the caller list in the Active Calls Area.

Answering an Incoming Call

Incoming calls ring and appear on the computer screen as a button with a telephone symbol.
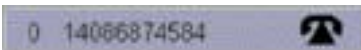
To answer an incoming call:

1. Pick up the telephone receiver (if not using a headset)
2. Use the mouse to click on the incoming call's button
3. The call becomes active
4. Speak into your phone handset or headset

Placing and Retrieving a Call on Hold

Circumstances demand that some callers be placed on hold. If you answer an incoming call while talking on another one, the first call will automatically be put on hold.
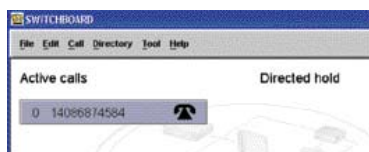

Image 13: An Incoming Call as it appears on the screen

To manually put a call on hold:

1. Click on the on-screen button for the call you want to hold
2. Click on the Call Menu
3. Select "Hold For Me"
4. The timer shows the length of the call being held.

Alternative manual methods:

a. Click on the on-screen button for the call you want to hold
b. b. Select the "Hold" button on the Toolbar

Or

a. Right-click on the incoming call button to display the pop-up menu
b. Select "Hold For Me"

To retrieve a call on hold:

a. Click once on the on-screen button for the call on hold

Or

a. 1. Right-Click on the button to bring down a menu
b. 2. Select "Retrieve"

Transferring a Call

Transferring an incoming phone call is a common chore that can be done quickly and easily via Switchboard.

To transfer a call:

1. Click on the on-screen button for the call you want to transfer
2. Move to the Directory and click on the individual who is to receive the call
3. Click on the Call menu
4. Select "Transfer the Call"
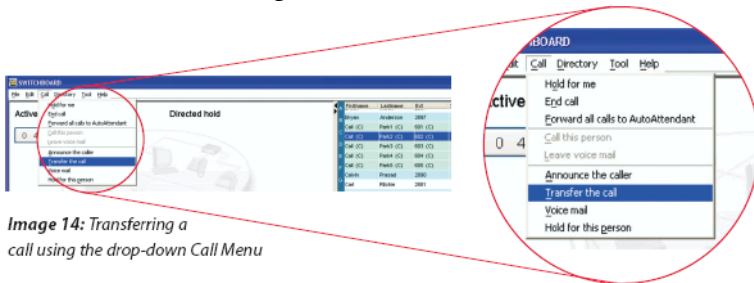
Alternative transferring methods:

Image 14: *Transferring a call using the drop-down Call Menu*

    a. Click on the on-screen button of the call to transfer
    b. Move to the Directory and click on the individual who is to receive the call
    c. Select the "Transfer" button on the Toolbar
    Or
    a. Click on the on-screen button of the call to transfer
    b. Move to the Directory and click on the individual who is to receive the call
    c. Select "Transfer the Call"

When the switchboard operator transfers a call, the destination telephone rings and operator's telephone reverts to a dial tone in North America or a busy tone if in Europe.

Announcing a Call

Announcing a call is done when the switchboard operator answers an incoming call and the caller requests to be connected with someone or their extension. The operator calls the requested individual's extension to inform of the incoming call. Then the call is transferred.

To announce a call:
1. If the call is not currently active, click on the on-screen button for the caller you want to announce
2. Move to the Directory and click on the individual who is to receive the call
3. Click on the Call menu
4. Select "Announce the Caller"

Alternative announcing methods:

    a. Click on the on-screen button of the call to transfer
    b. Move to the Directory and click on the individual who is to receive the call
    c. Select the "Announce" button on the Toolbar
    Or
    a. Click the screen button of the call to transfer
    b. Move to the Directory and click on the individual who is to receive the call
    c. Select "Announce the Caller"

5. When the intended recipient answers, operator advises of the incoming call
6. Then right-click on the "Directed Hold" area button to display a pop-up menu
7. Click on "Transfer"

Both caller and recipient information will disappear from the Active Calls area. The phone reverts to a dial tone in North America or a busy tone if in Europe.

Retrieving an Announced Call

You can continue a dialogue with the incoming caller, after having announced a call. You do this by re-activating the incoming call before you make the final transfer.

To re-activate the incoming call:

1. Right-click on the incoming call button in the "Directed Hold" area to display a pop-up menu
2. Select "Retrieve"

Or

» Simply click on the button directly and the incoming call will become active. The recipient button will stay in the Active Calls area. The switchboard operator can speak to either the caller or the recipient by clicking on their respective call buttons in the "Active Calls" or "Directed Hold" columns. Transfer as instructed above.

Transferring a Call Directly to Voicemail

Transferring an incoming caller directly to an individual's or group's mailbox is simple.

To transfer a call to Voicemail, in the Active Calls area:

1. Click on the on-screen button for the call you want to transfer
2. Move to the Directory and click on the individual who is to receive the message
3. Click on the Call menu
4. Select "Voicemail"

Alternative transferring methods:

a. Click on the on-screen button of the call to transfer
b. Move to the Directory and click on the individual who is to receive the message
c. Select the "Voicemail" button on the Toolbar

Or

a. Click on the on-screen button of the call to transfer
b. Right-click on individual in the Directory who is to receive the message
c. Select "Voicemail"

Making an Internal Call

To call within the organization, the simplest way is to:
1. In the Directory, double-click the name of the individual you want to contact
2. Your own telephone will ring
3. When you answer it, a button with a telephone icon will appear in the Active Calls area on the computer screen

To call within the organization:
1. Click on the individual in the Directory you want to contact
2. Click on the Call menu
3. Select "Call This Person"
4. Your own telephone will ring
5. When you answer it, a button with a telephone icon will appear in the "Active Calls" area on the computer screen (this screenshot would be more relevant if the console section was shown).

Image 15: Using the Directory to make an Internal Call

Leaving an Internal Message
To leave a message in an individual's Voicemail box:
1. Click on the individual in the Directory you want to contact
2. Click on the Call menu
3. Select "Leave a Voicemail"

Holding a Call for a Person
To hold a call for a specific person, in the Active Calls area:
1. Click on the on-screen button for the call you want to place on hold
2. Move to the Directory and click on the individual who is to receive the call
3. Click on the Call menu
4. Select "Hold for this person"

Alternative method:
a. Click on the on-screen button of the call to place on hold
b. Move to the Directory and right-click on the individual to display the pop-up menu
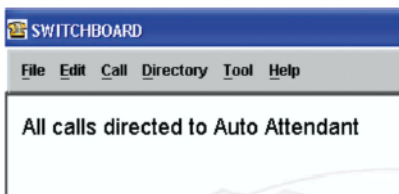c. Select "Hold for this person"

Image 16: Calls directed to the Auto Attendent

Activating the Auto-Attendant

Switchboard's Auto-Attendant is the application's advanced feature that will automatically manage in-coming calls when the operator cannot be present or during after-hours.

To activate the Auto-Attendant:

» Using the Call menu, select "Forward all calls to Auto-Attendant"
Alternative method:
    a. Using the Toolbar, click on the "Auto-Attendant" button

Deactivating the Auto-Attendant

To deactivate the Auto-Attendant:

» Using the Call menu, select "Cancel forwarding to Auto-Attendant"
Alternative method:
    a. Using the Toolbar, click off the "Auto-Attendant" button

When the Auto-Attendant is deactivated, the Active Calls area will revert to its normal state.

Directed Hold

When a call is located in the "Directed hold" column, this indicates the caller has been placed on hold by someone at an extension within the organization. The operator can check on the caller if several minutes pass without a change in status.
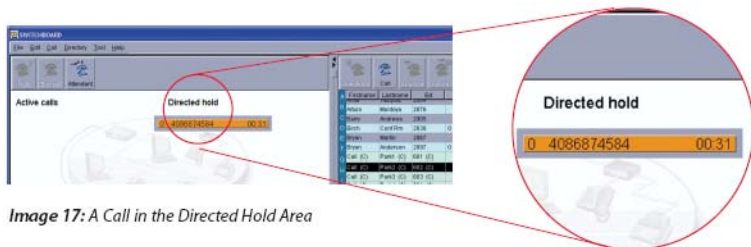

Image 17: A Call in the Directed Hold Area

Preferences Window

You can change the appearance of your Switchboard to suit your own tastes and way of working. Preference options are found under the Edit menu. After selecting Preferences, you will find:

- » **Configuration** options are set in the setup module, which is usually run only once, when you are first configuring the application. You cannot change the configuration from the preference window and are only shown for reference. To change the configuration preferences, you will need to run the application setup again. Refer to page 6 and the "Getting Started" section of this manual.
- » **Look & Feel** options allow you to choose from three different designs for the application window and let you show or hide the Toolbar buttons.
- » **Layout options** allow you to define the size of the Directory and the Reminder/Notebook windows, including the height of the rows. Narrower and shorter columns and rows will allow for more extension listings and messages. As an example the default value of the height of a row is 20 and can be scaled down easily to 13 to permit more rows in the layout.
- » **Color** options allow you to choose different shades for all the different areas on the window display. To choose the color for any of the areas shown:

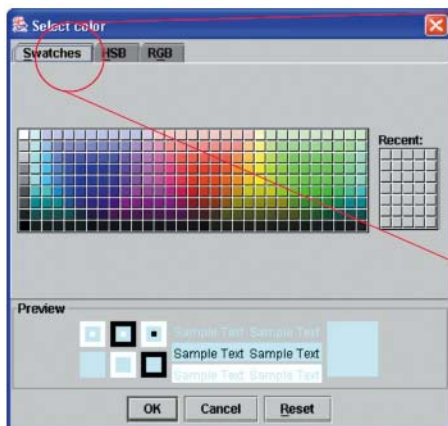*Image 19: Preference Window for Color*

Image 20: Select Color Window

1. Click anywhere in the color rectangle next to the object you want to change
2. Choose a color in the window that appears
- » In Select color window, there are three different tabs that lead to windows, which provide complete control over the colors of your screen layout. They are Swatches, HSB (hue, saturation, brightness) and RGB (red, green, blue).
- » The Swatches window provides about 270 different pre-set colors to choose from. The most recently chosen colors are displayed in the Recent window on the right. To choose a color:

15 |

- Click on one of the predetermined colors in the main Swatches area

Or

1. Click on one of the recently used colors on the Recent area.
2. Click on the OK button on the Swatches window
3. Click on the OK button on the main color preferences window
» The HSB window uses a slider bar to choose a color. Here's how:
   - Slide the bar up or down until the color is correct

Or

1. Move the small white circle until the required mix is achieved
2. Click on the OK button on the HSB window
3. Click on the OK button on the main color preferences window
» The RGB window uses three slider bars to choose a color. There is one for each of the colors, red green and blue:
1. Slide each bar to the right or left until the color area is correct
2. Click on the OK button on the RGB window
3. Click on the OK button on the main color preferences window

Resizing the Windows

You can resize the windows on Switchboard's screen display. There are two main window dividers. One separates the Active Calls area from the Reminder/Notebook area below it. Another divider separates the Directory area from the two other areas.

To move either divider:

1. Move the mouse pointer over the divider and when it changes to a double-headed arrow.
2. Click, hold and drag the divider to the required location.

Miscellaneous System Numbers

The following numbers are to access different extensions not associated with employees.

- » **555: Voicemail:** This is the internal number you call from your extension to access Voicemail
- » **556: Conference Bridge:** The conference bridge is a reservation bridge that users of the system can schedule conference bridges for internal and/or external use.
- » **444: Auto-Attendant:** This is the internal number you could call or transfer a caller to reach the Auto-Attendant allowing, menus including dial by name 1, dial by extension 2, company directory 4, or 500 to reach Voicemail. This is also the greeting someone will get when they call your company and someone does not answer.
- » **500: Access Voicemail:** This number can be reached from the outside through the attendant to access your Voicemail.
- » **559: Company Voicemail and Auto-Attendant recording:** Extension 559 changes require a system password. Default password will be 388045 it is recommended that it is changed.
- » **601-605:** Park Extension Range: These numbers are used to park a call without transferring it to a specific extension. A parked call can be picked up from any extension phone on the system.

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WARNING

Toll fraud is committed when individuals unlawfully gain access to a customers tele-communication system. This is a criminal offense. Currently, we do not know of any telecommunications system that is immune to this type of criminal activity. 8x8 Inc. will not accept liability for any damages, including long distance charges, which result from unauthorized and/or unlawful use. Although 8x8 Inc. has designed security features into its products and services, it is your sole responsibility to use the security features and to establish security practices within your organization, including training, security awareness, and call auditing to eliminate security risks.

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