

SWITCHBOARDFREE

USER MANUAL

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Welcome to your Free Switchboard!

Congratulations on setting up your Switchboard account. This manual will assist you through the process of using and fine tuning your system. If you are unable to find what you are looking for within the manual, or need further support, please contact the support desk on 0844 884 3010 (available 9am - 5pm Monday to Friday).

The screenshot displays two sections of the 'My Numbers' interface. The top section, 'My SwitchboardFree Numbers', contains a table with columns: Number, Description, Calls (Answered), Calls (Missed), Settings, Monitor, and Quick Close. A row shows the number 0843 with a description, zero calls answered or missed, settings, monitor icons, and an 'OPEN' button. Below this is a 'Get New Number' button. The bottom section, 'My Fax to Email Numbers', contains a table with columns: Number, Description, Faxes Today, Settings, and View. A row shows the number 0844 with the description 'Test fax to email number', zero faxes today, settings, and view icons. Below this is another 'Get New Number' button. Numbered callouts 1-9 point to: 1. Number column, 2. Description column, 3. Calls (Answered) column, 4. Calls (Missed) column, 5. Settings icon, 6. Monitor icon, 7. Quick Close button, 8. Faxes Today column, and 9. View icon.

You have reached the “My SwitchboardFREE Numbers” screen where you will see, at a glance, what is happening with your number(s), and tools for changing and amending your Switchboard number functionality.

- 1. Number** Click to customise your number, set opening times, redirects, hold music, messages and much more!
- 2. Description** This distinguishes your SwitchboardFREE numbers so you can see at a glance which number relates to which department.
- 3. Calls (Answered)** This shows the total number of answered calls received on that number for that day. This allows you to know which number is busier to enable you to manage your calls more efficiently.
- 4. Calls (Missed)** This shows the total number of missed calls received on that number for that day. This allows you to identify which of your numbers is missing calls to enable you to take action to ensure you never miss a call again.
- 5. Settings** Click here to configure and customise your SwitchboardFREE or Fax to Email number.

6. Monitor

Monitor the number of people currently on hold in your SwitchboardFREE number(s). Manage your calls efficiently and gather statistics about hold times/call times.

7. Quick Close

Quickly open/close your queue if you are in a hurry! Useful if you work alone and need to leave the office and wish to close your queues without having to re-configure. Your calls will go to voicemail so you will need to ensure your message is generic enough to be accessed at any time!

8. Faxes Today

See how many faxes you have received that day at a glance.

9. View

Click to view any faxes that have been stored on the system.

You can configure your queue numbers via the "My Numbers" page. Simply click on the number you wish to amend, or the Config icon (if you are a Skype user, you may find clicking on the number will dial out).

There are many options on this page, many ways to personalise this service to your benefit. You may want to use all of the options available or just some of them. The queue number you are configuring remains at the top of the page.

Redirect	Landline Number	Ring for	Rate	Location
Redirect 1	<input type="text"/>	25 seconds	FREE!	Lowestoft
Redirect 2	<input type="text"/>	25 seconds	FREE!	
Redirect 3	<input type="text"/>	25 seconds	FREE!	
Redirect 4	<input type="text"/>	25 seconds	FREE!	
Redirect 5	<input type="text"/>	25 seconds	FREE!	

You currently have £0.40 of redirect credit remaining. [Click here to topup.](#)

Redirects

This section is very important for the functionality of your number and the way it behaves. Follow the on-screen instructions for re-directing to specified landlines (you are allowed up to 5 landline numbers free). Simply type in the landline number in the allocated space and specify the line type (please note there may be time delays with VOIP systems). Save your changes.

Small charges apply for redirect to mobiles and these can be paid for via top-ups. The top-ups come in various denominations and can be purchased easily by following the links. When adding a mobile telephone number to the redirect system, please note that the mobile number will be automatically validated to ensure it is a live UK-registered number.

Introduction **Member of staff**

Introduction

Calls can be answered with a customised message. All messages start in the same way; simply choose the end of the message from the drop-down menu. It is worth noting that if one of your numbers is directed to a fax machine, simply choose "fax introduction" from the drop-down menu and the caller will hear appropriate instructions. If you have a PBX system, it may already have a greeting, therefore you will not need another; choose "no introduction".

You can record your own greeting; just follow the link and then follow the steps, making sure you have read the "hint" first! Check your saved message by calling your queue number.

The pin numbers are only valid for 30 minutes from the point that the settings page is loaded.

An option is available to have greetings and messages recorded via our professional voice-over artist. The message will be recorded by the same professional voice over artist who recorded all the standard Switchboard prompts giving your users a seamless telephone call experience. Find out more by clicking on the “upgrades” link.

Give your queue number a name or description to highlight different departments (e.g. sales, support, finance) or to highlight different marketing campaigns (e.g. website, national magazine, international publication). This is an excellent function for reporting information and missed call alerts. Don't forget to save your changes.



On Hold Music

Whilst trying to connect your call we will play the caller “on-hold” music, which helps to project a professional image. Listen to samples of “on-hold” music by visiting the “features” page and dial the telephone number of the music you would like to listen to. Please note that call charges apply. Select your chosen music and save your changes.



Missed Calls Emails

Choose where you would like your “missed call” alerts to be emailed to so that you are always aware of any calls you may have missed. Enter the email address where you would like your alerts to be sent (you can enter more than one email address, just separate the addresses with a semi colon) and save changes.

Please note that if the caller's number is withheld, no number will be attached to the missed call alert.



Voicemail

Your caller will have the option to leave a voicemail if they have been on-hold for longer than two minutes or if your lines are closed. You can customise the system to give your caller the option to leave a message rather than hold (your caller will follow prompts to do this) - choose how many seconds the caller will hold for and save the changes. You will need to tick the box to activate the voicemail option and supply an email address to receive your voicemails (which will be emailed to you with a WAV file attachment. Save any changes made.

Open/Close Times	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Open	17:30	17:30	17:30	17:30	17:30	10:00	00:00
Close	22:00	22:00	22:00	22:00	22:00	22:00	00:00

Automatically close your SwitchboardFREE number on bank holidays: OFF

Open/Close Times

Set the opening hours for your queue number. To close a line all day set the Open to "00:00" and the Close to "00:00". To open your lines 24*7 set the Open to "0:00" and the Close to "23:59".

Save your options.

Out of hours message Your callers will hear: Sorry we're unable to take your call at the moment...

Out of Hours Message

Set what message you would like your callers to hear if they ring outside of the hours your SwitchboardFREE number is open. Choose from a variety of prerecorded messages or use the custom recordings feature to record your own.

Custom Recordings To record your own bespoke introduction, out of hours and whisper messages call our 24 hour automated recording line on **0906 714 0159*** and when asked enter the pin number **40544419**

[Make Custom Recording](#)

Custom Recordings

Customise your messages, greetings and/or caller instructions/prompts by selecting one of the given options and following the given links. You may find that the 8-digit pin does not work and this may be because you have been logged on for longer than 30 minutes. You will need to go back to the "My Numbers" page and start the process again, making sure you take less than thirty minutes from beginning to end.

Handy hint - your introduction is a different message to the message a caller will hear when they call your office "out of hours".

Delivery Method Your calls will be delivered: In the order they have been entered (sequentially)

Delivery Method

Chose your preferred method of how you would like your designated numbers to be dialled and save your changes.



Number Presentation

What number would you like displayed on your incoming calls? Select your preferred option. If you have a PBX system, numbers can be routed to different departments within your organisation. Don't forget to save any changes made.



Description

Give your queue number a name or description to highlight different departments (e.g. sales, support, finance) or to highlight different marketing campaigns (e.g. website, national magazine, international publication). This is an excellent function for reporting information and missed call alerts. Don't forget to save your changes.



Call Screening (Whisper)

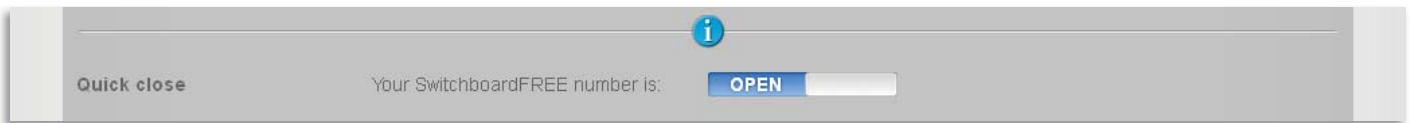
Numbers can be identified to you so that you can decide to accept or reject calls. You may also find this useful if you wish to identify between types of call (e.g. sales, support, finance) (personal, business) so that you have advanced warning of how to greet the caller. Tick the box and save the changes if you would like the call screening/whisper to be activated and/or follow the given link to personalise the whisper. If you would like to personalise the whisper and follow the instructions to do so, you may find that the 8-digit pin does not work and this may be because you have been logged on for longer than 30 minutes. You will need to go back to the "My Numbers" page and start the process again, making sure you take less than thirty minutes from beginning to end.

Handy hint - pressing "3" sends the caller to voicemail should you prefer that they leave a message.



Announce Position

Switch the toggle to "ON" and save the changes if you would like the caller to know their position within the call queue.



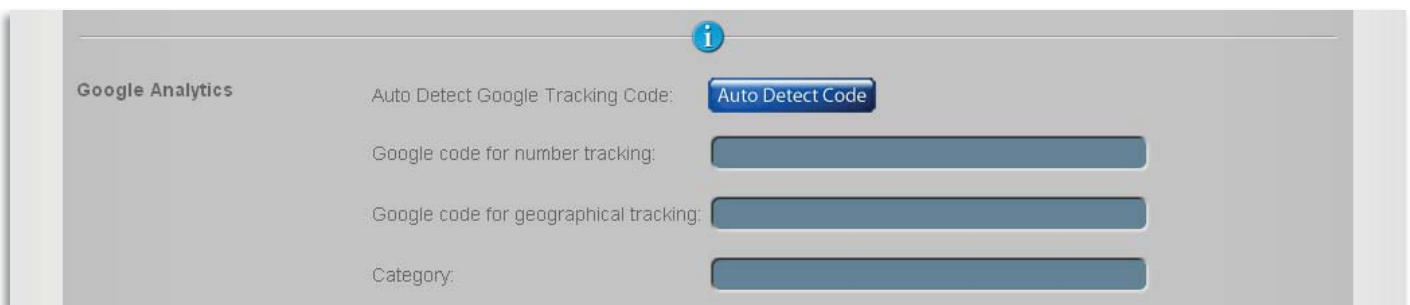
Quick Close

Switch the toggle to "OFF" to close quickly close your queue. If your queue is closed then all incoming calls will be played the out of hours message.



Missed Call SMS Alert

You can choose to have "missed-call" alerts sent to your chosen mobile phone, so that you are always aware of any calls you may have missed. Enter your chosen number, tick the box and save the changes. There is a fee associated with this service; follow the link to get your SMS credits to pay for your SMS alerts.



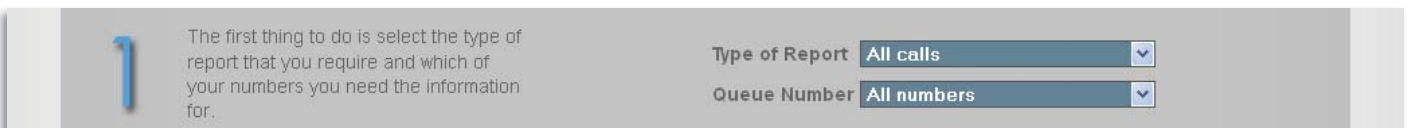
Google Analytics

Use this feature to track your call traffic using google analytics. By entering the required details we can place information about your call traffic into google analytics for you to analyse.

The most powerful feature of SwitchboardFREE is the assurance that you'll never miss a call again. Although missed call alerts are delivered in real time to your email address, the Call Stats area of your control panel enables the fast generation of an array of call lists and reports, including both a full list of all missed calls and a unique missed callers report. The ability to generate call lists can empower your sales staff by providing them with a list of interested prospects to call (whether you've spoken to them not) within a few clicks of the mouse!

Create a Call List/Report

Follow these simple steps to start generating call lists and other reports:



1 The first thing to do is select the type of report that you require and which of your numbers you need the information for.

Type of Report

Queue Number

Step 1 Select your desired type of report from the list provided (report types are described further on).

Select which SwitchboardFREE number you'd like to generate the report for (the default setting is 'All Numbers').



2 Secondly, either select one of the preset buttons or manually enter the period of time you wish your report to cover.

Show your calls from

or show calls between

Start Date End Date

Step 2 Select the date range you'd like to generate the report for.

Select from any of the pre-defined time periods with a single click, or enter specific start and end dates



3 Finally, select the maximum amount of records to display for your report and the format in which you would like it displayed.

Maximum Records

Report Format

(Report will be shown below)

Step 3 Select the maximum number of records to display in this report.

Select your preferred report format :

- On screen - For an instant report in your browser window
- CSV download - you'll be prompted to save a comma-separated values data file to your local machine, from which you will be able to manipulate the data in MS Excel or other programmes

Report Types

All Calls

Lists all the calls you've received on the number selected, in the date range chosen. The list will include answered & missed calls and calls that ended in a voicemail being left for you.

Missed Calls

Lists all the missed calls you've received including multiple instances of the same number when it has called more than once.

Voicemails

Lists all the voicemails you've received, plus a one-click option to listen to each of the voicemails from within the browser window.

Unique Missed Callers

Lists only a single instance of each missed caller. Unlike the missed Calls report, this report filters both any multiple missed call instances from the same caller and removes any callers whom we've detected have successfully spoken with you since their last missed call.

Callers Ordered by Hold Time

Lists all calls ordered by how long the caller was on hold of. If the call was missed, it would be recommended that you prioritise calling back those missed callers who were on hold for the longest period of time.

Unique Caller Summary

Lists the number, last call date & time and total number of calls made by every unique caller in the date range selected.

Calls Ordered By Duration

Lists all unanswered calls in order of the call duration. This might be useful for identifying 'needy' customers or identifying staff training needs, for example.

Mobile Redirects

This report is only of use to users who redirect to a mobile telephone number using prepaid mobile redirect credits. It lists all inbound calls that were redirected to a mobile phone. This report is an itemised statement, primarily detailing the associated deductions from your mobile redirect credit balance.

Campaign tracking allows you to quickly and easily produce advanced statistical reports on traffic to your numbers. It also allows you to compare statistics between numbers which can be used for monitoring and optimising your marketing spend, providing a PPC (Pay Per Click) style billing model to your advertising customers and much more.

Overview Tab

Using the overview tab you can see at a glance the current status of previous or active campaigns as well as quickly attaining the vital statistics associated with each.



Order campaigns by:

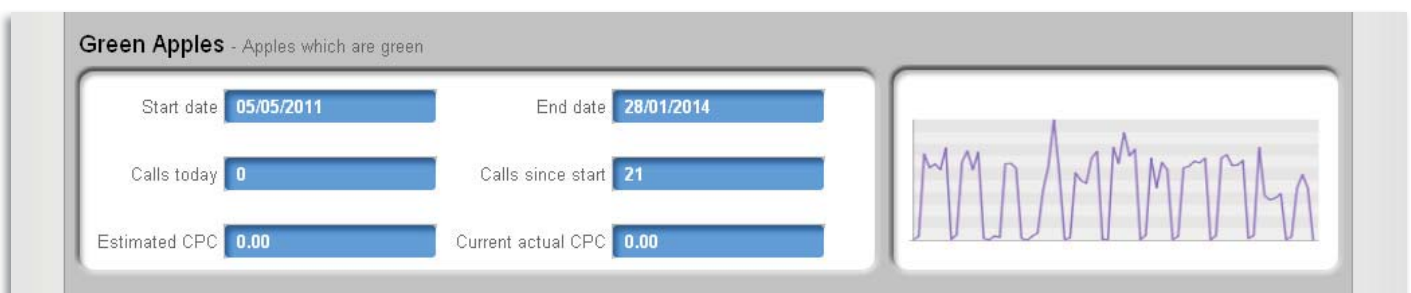
▼ Start Date	End Date	Calls Today	Total Calls	Estimated CPC	Actual CPC	Campaign Name
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You can click and drag any of the summaries below to rearrange the list, or click on the buttons above to sort

Order Campaigns

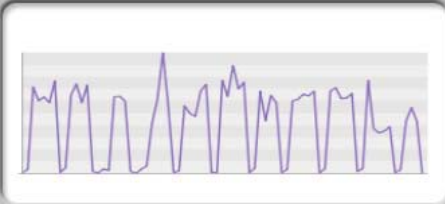
It is easy to organise the order you wish to view your campaigns by clicking on any of the categories on this page. Click once to order categories in descending order and click a second time to organise categories in ascending order.

Alternatively you can click and drag any of the categories to reorder the arrangement of your campaign overview.



Green Apples - Apples which are green

Start date	05/05/2011	End date	28/01/2014
Calls today	0	Calls since start	21
Estimated CPC	0.00	Current actual CPC	0.00



Campaign Overview

The above image shows the quick overview of a campaign. The information shown includes the start and end date of your campaign, how many calls your campaign has received either today or since the start and also the estimated and current actual CPC (Cost Per Call).

Finally the graph gives you a visual representation of activity on your campaign over its duration. To see the graphical data in more detail and to get more advanced information on what that graph shows then click on the image.

Management Tab

Using the management tab you can modify/delete existing campaigns or you can create a new campaign.

Use this page to create new campaigns and change the settings of current ones. [+ Add New Campaign](#)

1 Name	2 Description	3 Start date	4 End date	5 Status	6 Delete	7 Numbers	8 Edit
Green Apples	Apples which are green	05/05/2011	28/01/2014		Delete	Numbers	Edit
Red Apples	Apples which are red	03/05/2011	28/01/2014		Delete	Numbers	Edit
Purple Apples	apples which are purple	01/05/2011	28/01/2014		Delete	Numbers	Edit

- 1. Name** This is the name of this particular campaign.
- 2. Description** If you have a lot of similar campaigns then this can be extremely useful in helping you quickly find the one you are looking for.
- 3. Start Date** This is the date that your campaign was launched.
- 4. End Date** This is the date that your campaign either finished or is due to finish.
- 5. Status** This will tell you whether the campaign is not yet active, active or finished.
- 6. Delete** Press this button permanently delete that campaign.
- 7. Numbers** Pressing this button will launch a popup window that gives you control over which of your SwitchboardFREE numbers you wish to assign to this campaign.
- 8. Edit** Press this button to launch a popup window that allows you to edit the name, description, start and end date of that campaign.
- 9. Add New Campaign** Press this button to launch a popup window that allows you to create a new campaign.

Standard Reports Tab

Use this tab to create detailed reports on your campaigns.



Step One

The first step is to select the campaign you wish to get a report for.



Step Two

The second step is to select the type of report that you wish to create. The options include

- Call result by redirect number
- Total call times by redirect number
- Unique caller summary
- Call counts & minutes by day
- Call counts & minutes by week
- Call counts & minutes by month
- Call listing



Step Three

The final step is to select the desired date range and click 'Run Report'. Your report will be promptly displayed below.

Comparison Reports Tab

Use this tab to create reports comparing the statistics of different campaigns.



Step One

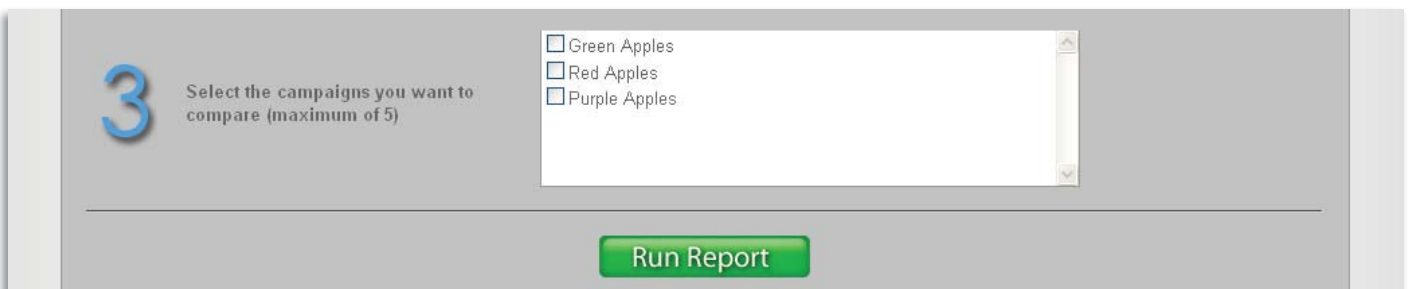
The first step is to select the type of report you wish to create. The options include

- Number of calls by day
- Number of calls by week
- Number of calls by month
- Number of minutes by day
- Number of minutes by week
- Number of minutes by month



Step Two

The second step is to select the range of time that you wish to view a report for.



Step Three

The final step is to select the campaigns you wish to compare, noting the maximum number restriction. Click 'Run Report' and your report will be promptly displayed below.