SonataSuite

Sonata SwitchBoard
Reference Guide Ver. 1.03

CONTENTS

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Introduction

Sonata Suite is a set of programs that integrate with platforms based on Asterisk, below the list of these programs:

- **SwitchBoard**
- Billing System
- Recording Management System
- Call Center Reports
- Communicator

1. – SwitchBoard

Sonata Switchboard is an application through which you can monitor in real time all the activity in your PBX. Here's how to configure Sonata Switchboard and all its benefits.
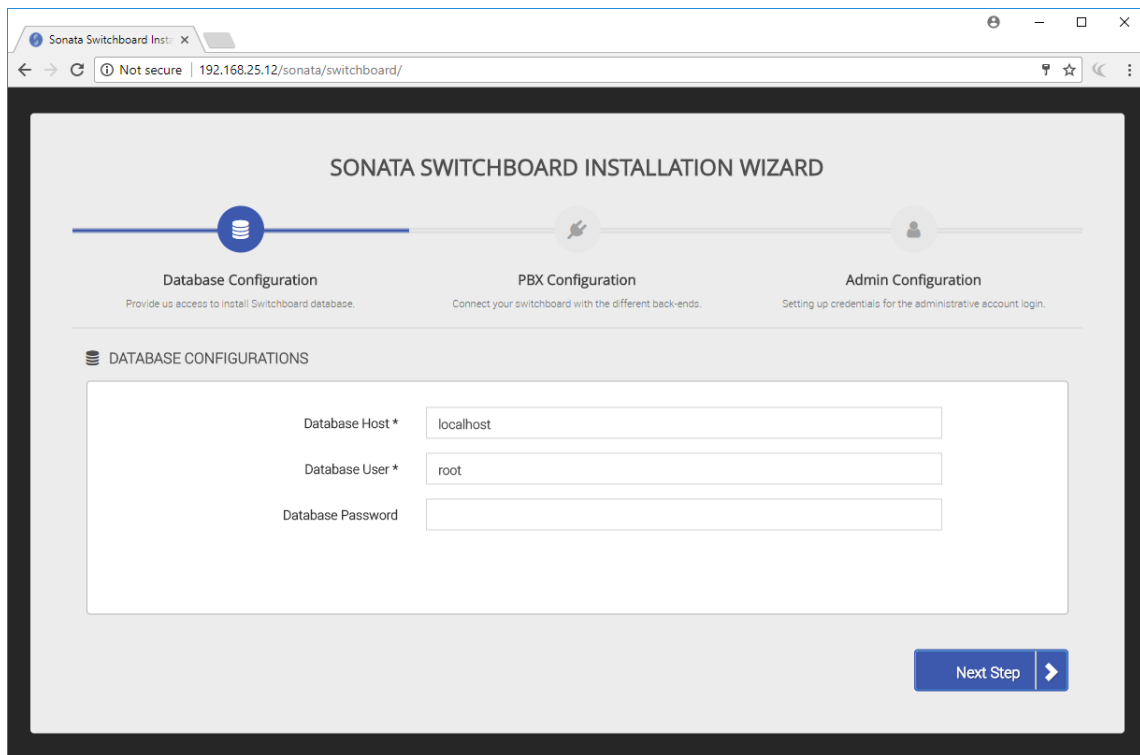
1.1 Installation

1.1.1 Downloads and Install

Open de SSH console and download the repo and copy in /etc/yum.repos.d/

wget repo.telesoftsa.com/sonata/sonata.repo

mv sonata.repo /etc/yum.repos.d/sonata.repo

yum install sonata-switchboard

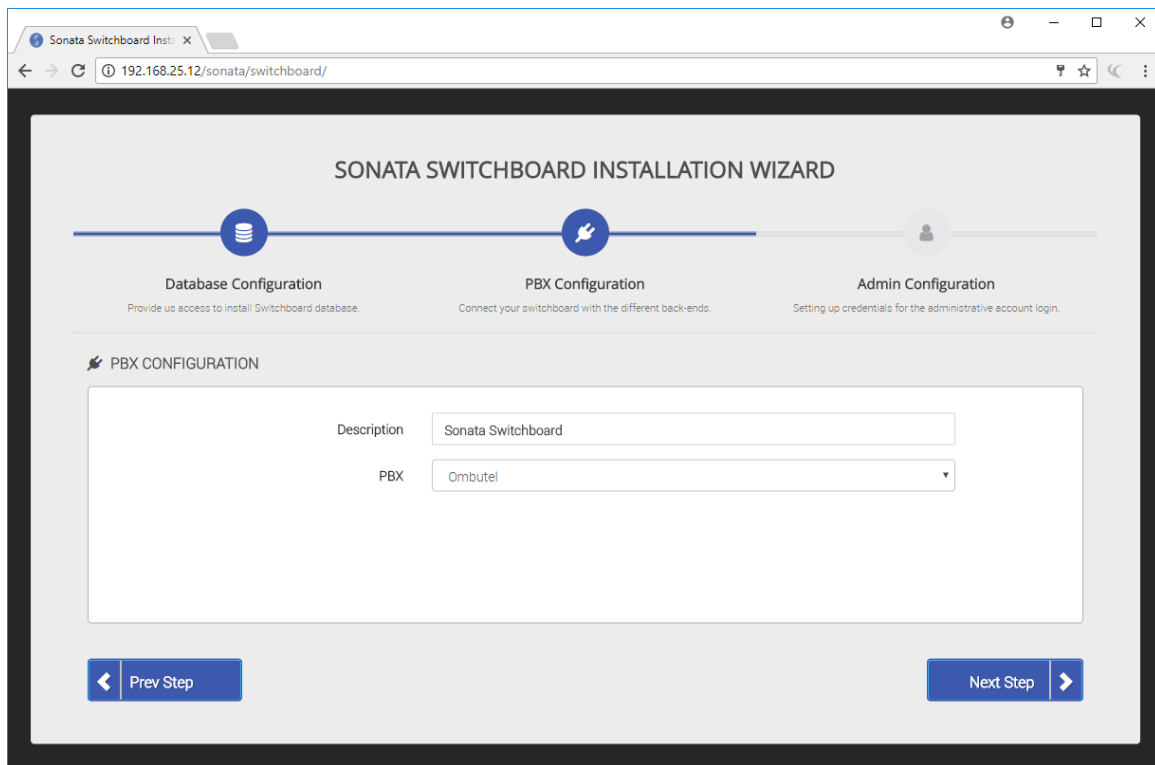## 1.1.2 Goto URL

IP/sonata/switchboard/

a.- The first step is to fill the following information

- Database Host, if you install Sonata Billing on the same server where the PBX is installed and the CDRs are stored, it is recommended to select "localhost", otherwise enter the remote IP or host.

- Database User, user to access the MySQL database administrator, is very important as it is used to create Sonata Billing databases.
- Database Password, password to access the MySQL database administrator, is very important as it is used to create Sonata Billing databases. In the case of Ombutel and CompletePBX the root user does not have a password.
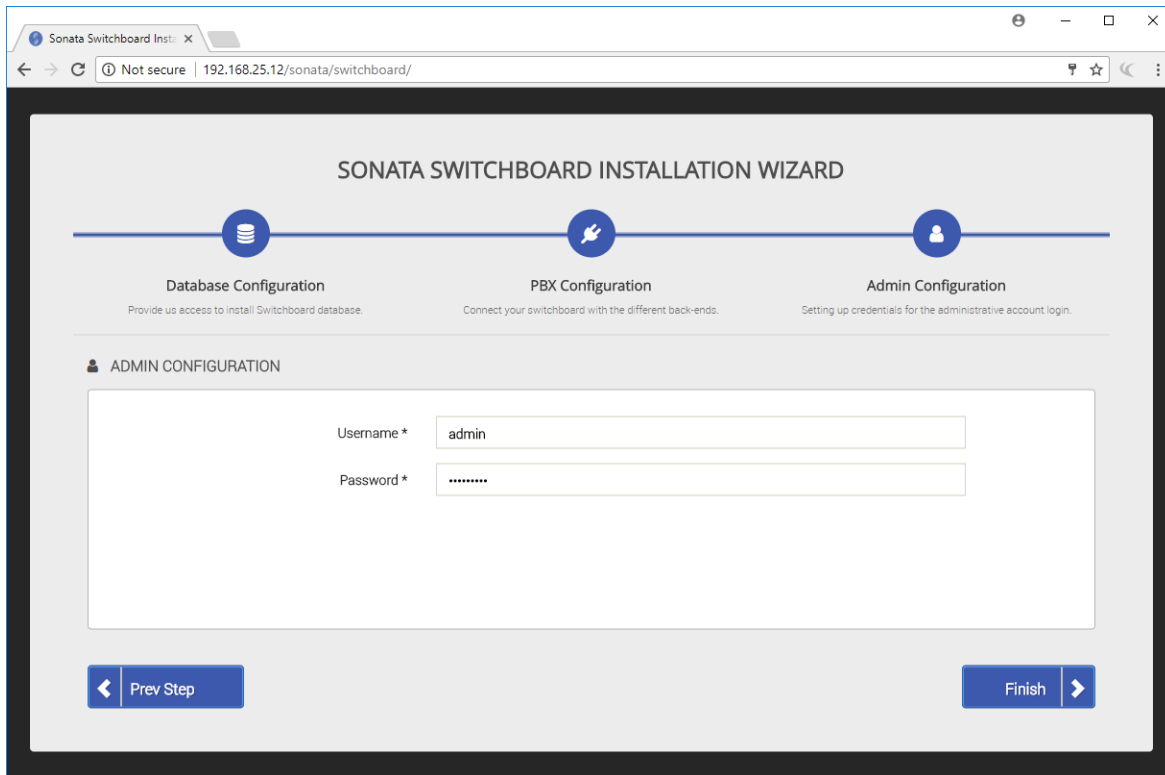
b.- The second step is to fill following information

- Description, Description of the PBX to which we are going to connect the Switchboard.
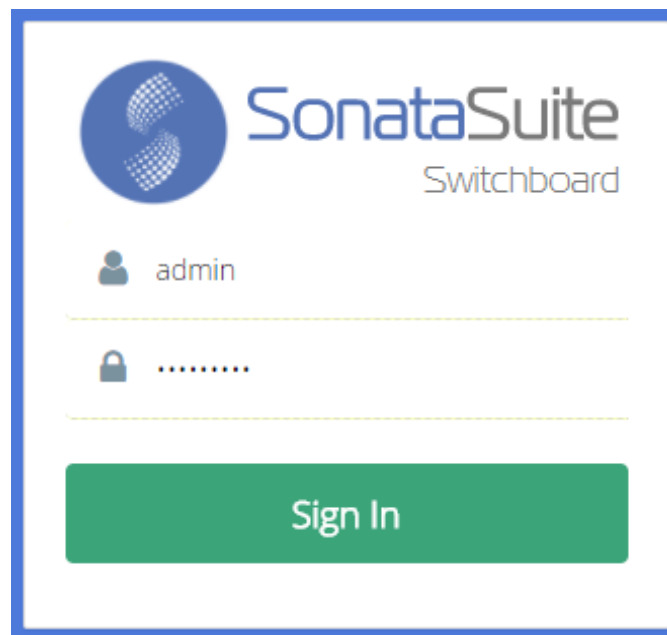- PBX, Type of PBX to which we will connect the Switchboard.

c.- The final step is to fill following information

- Username, admin user to login into Sonata Billing.
- Password, admin password.

d.- Login with the user and password previously created.

1.1.3 Enable Firewall Port

Sonata Switchboard works with port TCP 3001, to enable this port it is necessary to go to ADMIN/ Security/Firewall and add it in the SERVICES TAB.
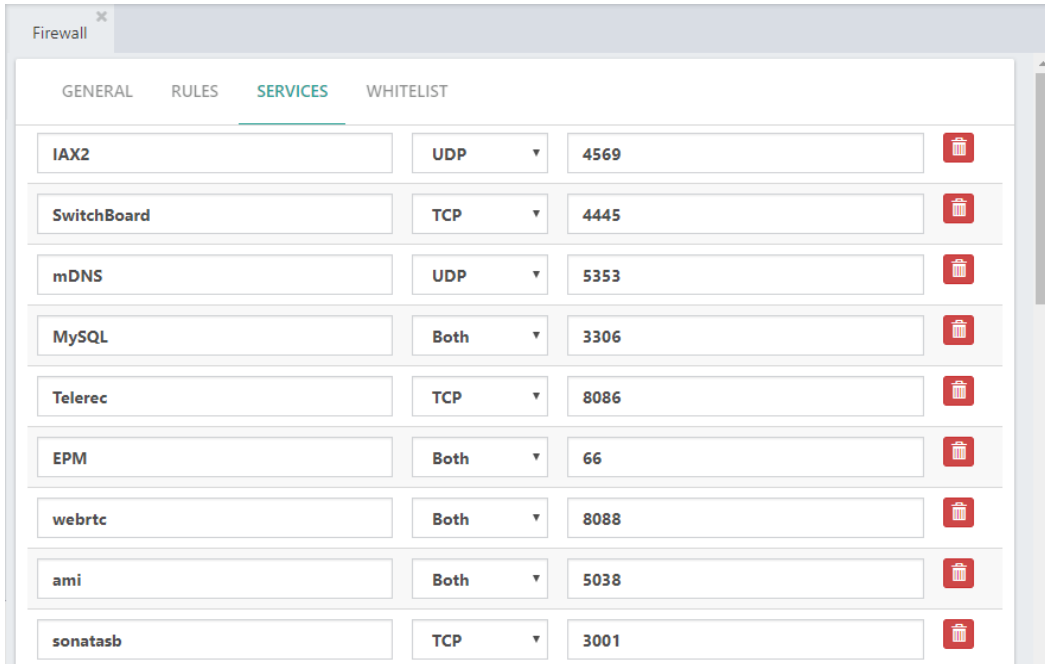
Then in the TAB of RULES add the rule with the service created previously.
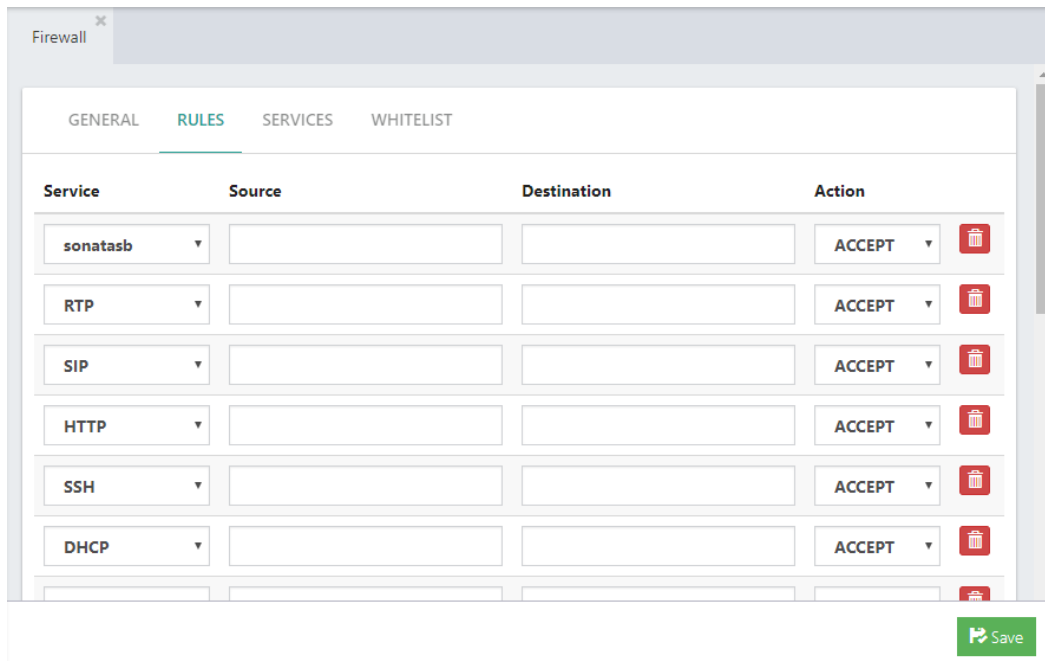
1.2 PBX Settings
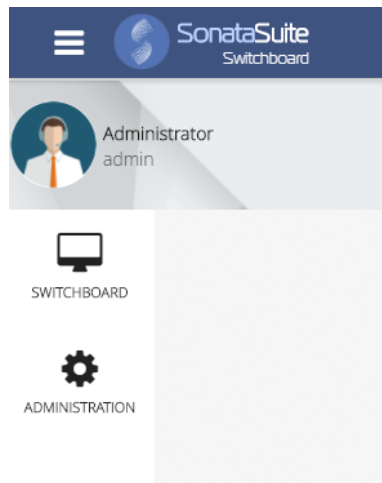
Go to Administration/Connection.
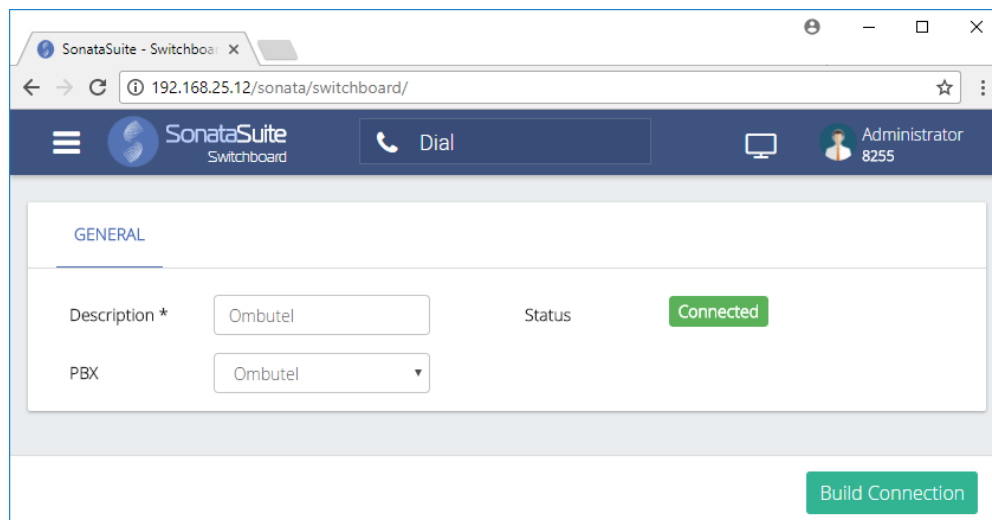
- Description *, Brief description of the connection.
- PBX, Type of PBX with which we are going to connect.
- Status, Shows the connection status.

1.3 Roles

Roles are the rights that each user has. To configure it you must go to Roles and select the option that you want the Role to have access to.
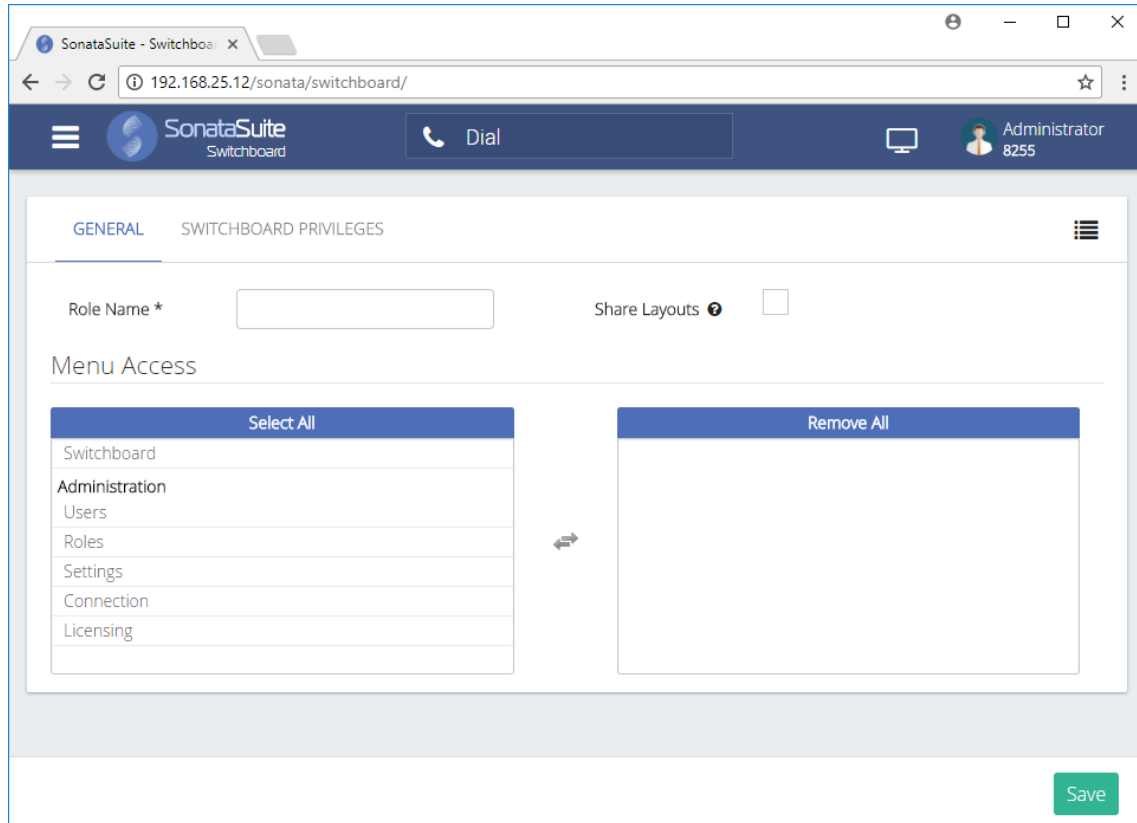
Then in the Privileges, we have two options. One, the items included in the Role, and the second include Actions.
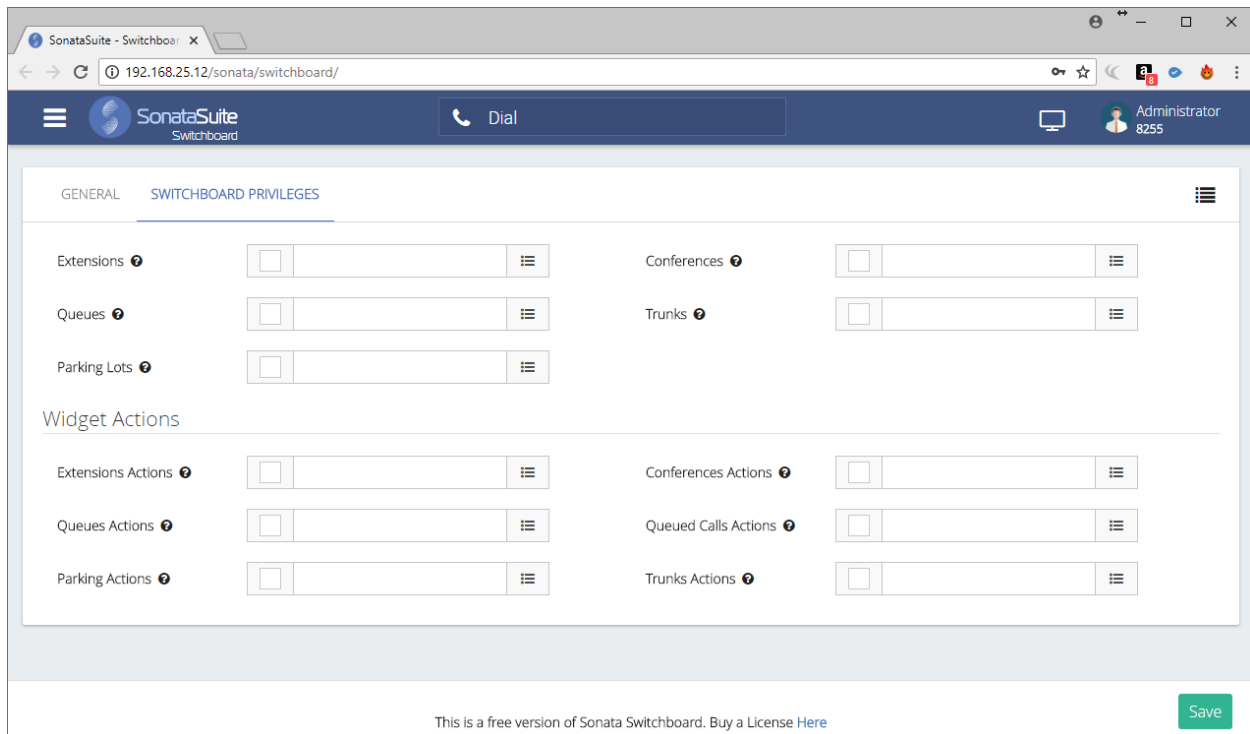
In Extensions Actions, we have:
- Originate Call
- Spy
- Spy with Whisper
- Hang-up
- Pickup Call
- Transfer
- Supervise Transfer

In Queue Actions, we have:
- Add Member
- Remove Member
- Pause/Un-Pause

In Parking Action, we have:
- Un-park

In Conferences Actions, we have:
- Kick
- Mute/Un-Mute

In Queue Calls Action, we have:
- Take Call
- Transfer Calls

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1.4 Users

You can create multiple users associated with their own extension. Each user can have certain privileges regulated by the Role to which he or she is associated. To configure users to go to Administration/Users and create the Users.
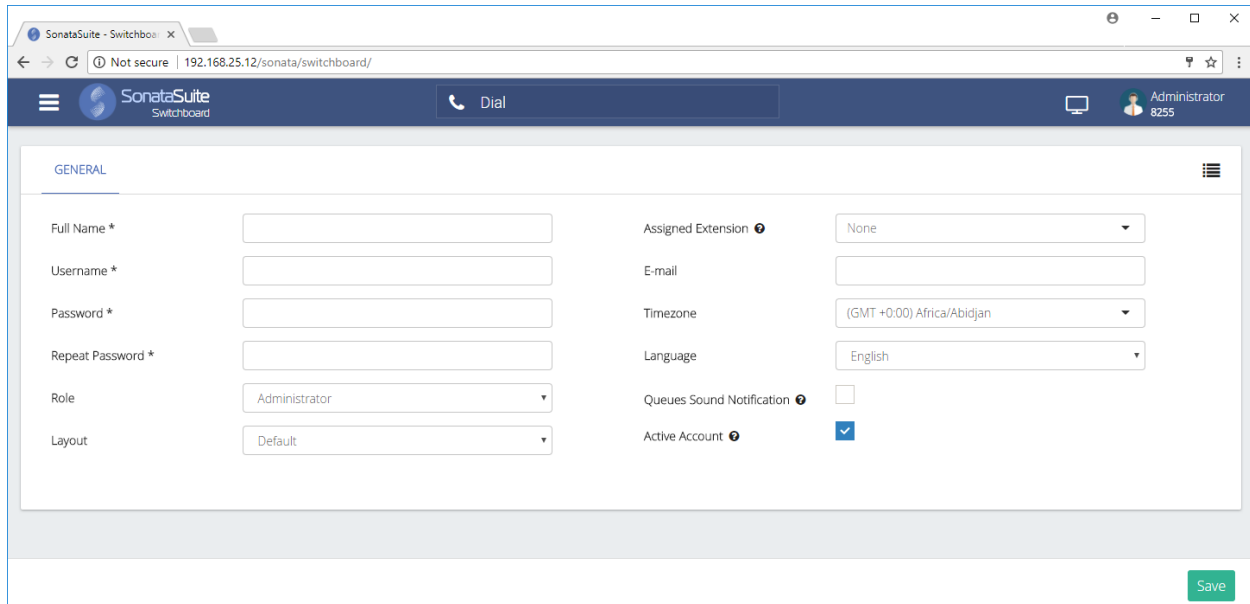

Fill the following information:

- Full name, full name of the person.
- Username, Username to login to the application.
- Password, Password to login to the application.
- Repeat Password, Confirm password to login to the application.
- Role, select the role (created previously).
- Layout, Select Layout to show it in startup.
- Assigned Extension, the user can use this extension to login to the system or execute any allowed actions.
- Email, optional.
- Time Zone, time zone of the user.
- Language, language to show the interface.
- Queue Sound Notification, if is checked, a sound notification is played when a new caller joins to any queue visible in your switchboard.
- Activate Account, if you un-check this option the user won't be able to login to the GUI.

1.5 Settings

In Settings the reasons of Pause are configured, very useful when creating reports by agents. To configure this option go to Switchboard/Administration Settings.
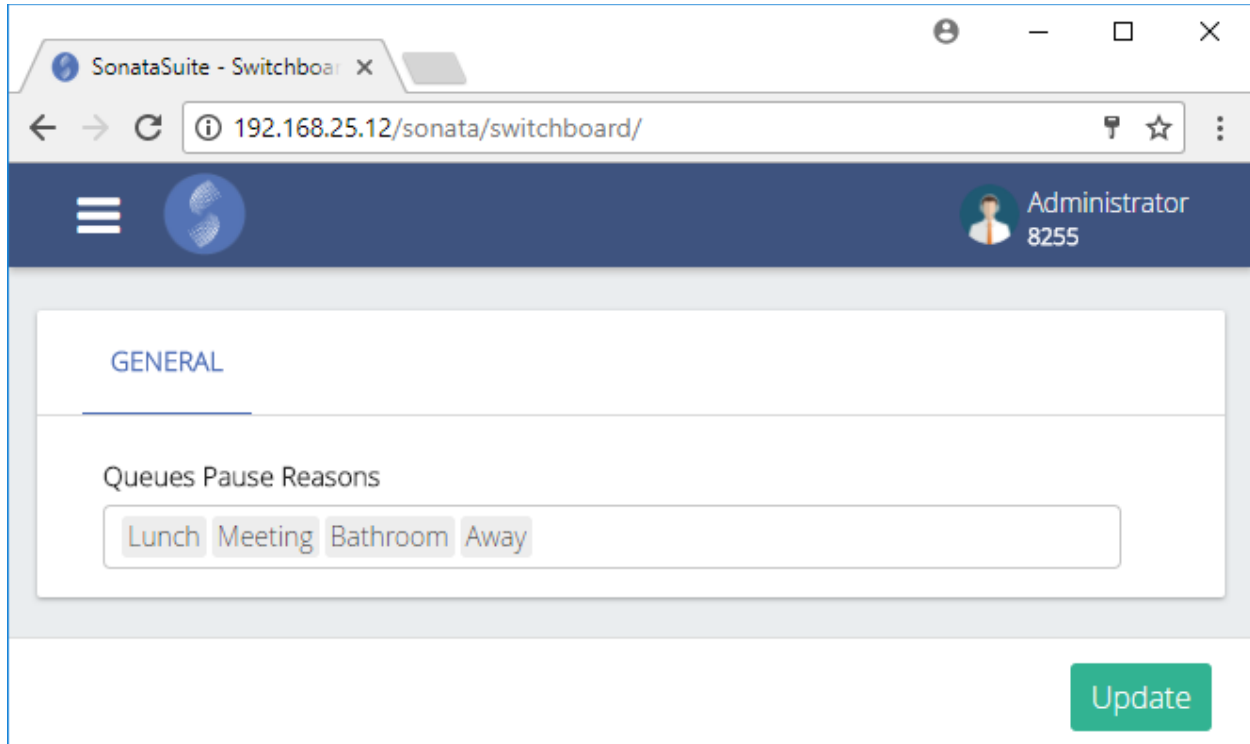
Fill the following information:

- Queues pause Reasons, add the different pause reasons.

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1.6 License

Sonata SwitchBoard installs a free version that is limited to monitor 15 extensions and create 3 Widgets, if you want the Pro version, you must enter the code in Administration/Licensing. You can buy this code on our website, https://www.telesoftsa.com.
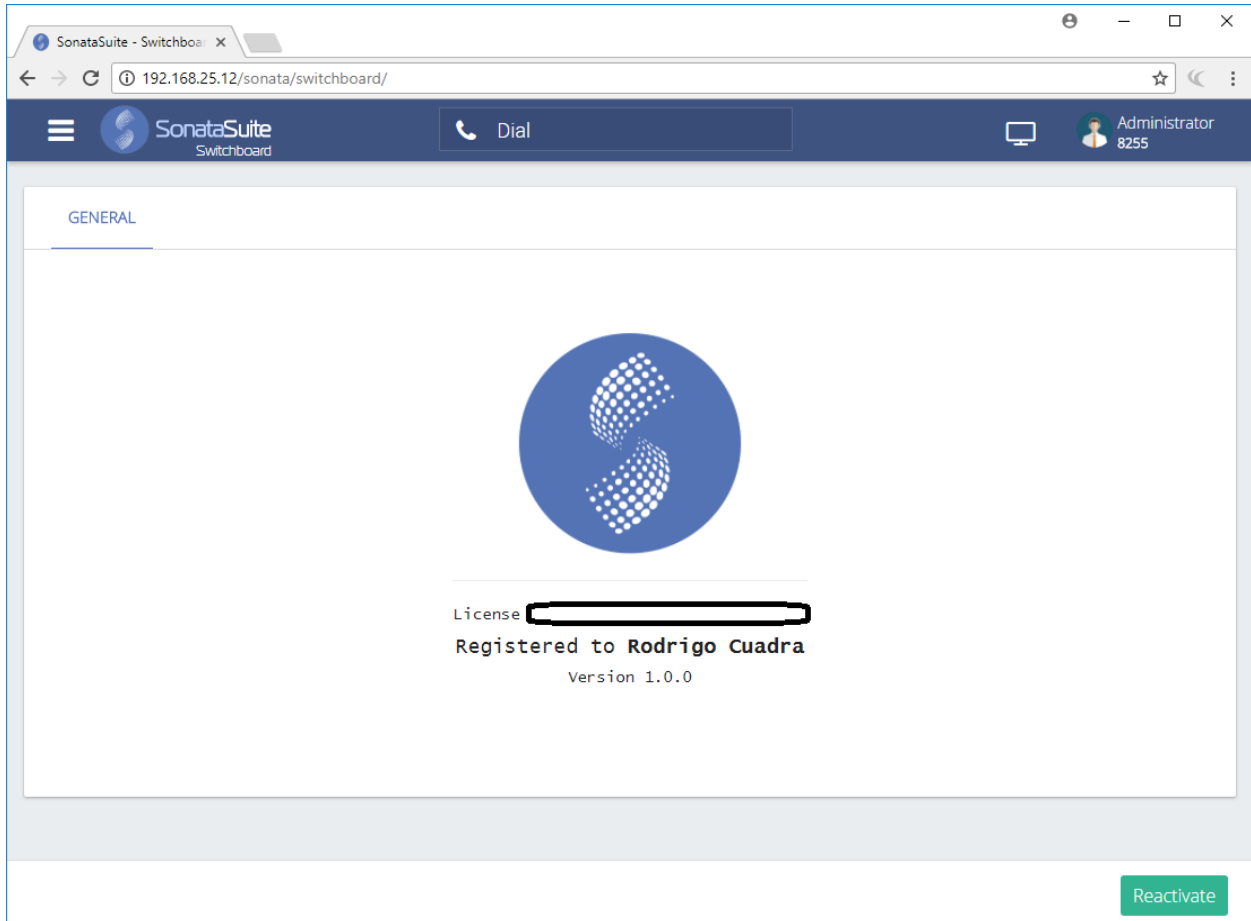
1.7 Modules (Widgets)

SwitchBoard is an interface with which you can monitor and manage the different activities of your PBX. The different modules that this application has are:

- My Extension
- My Queues
- Extensions
- Console
- Queues
- Conferences
- Parking Lots
- Queues Stats Summary
- Queues Members Summary
- Queue Calls
- Queue Overview
- Queues Calls Counter
- Trunk

1.7.1 My Extension

Shows my extension status and management; Transfer, Park and Hang-up (to activate these options you need to select the call).
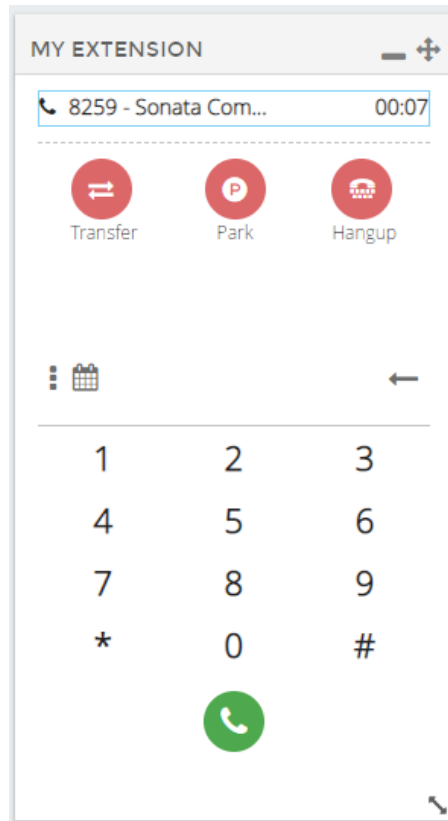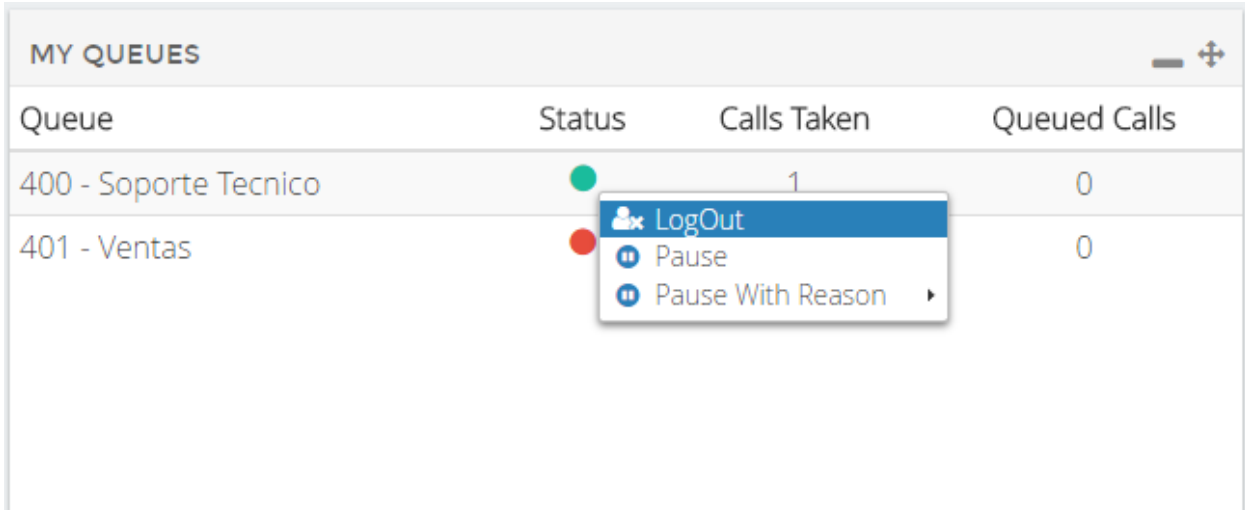
If your extension belongs to a queue, the menu will appear to manage the Login, Logout, Pause and Unpause when you press the icon ⋮ .
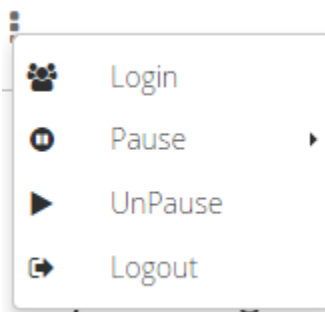
If you press the calendar 📅 icon a call history will appear.

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1.7.2 My Queues

Shows all the queues to which the extension belongs.

Possible actions (Right Click over the green, red, or yellow circle)

- LogIn, Add the Agent to the Queue
- Logout, Remove the Agent off the Queue
- Pause/UnPause, Pause or UnPause the Agent on the Queue
- Pause with Reason, Pause the Agent on the Queue with specify reason.

1.7.3 Extensions and Console Mode

It shows all extensions with their respective status with the possibility of interacting with them. You can hide extensions that are not registered in the system.
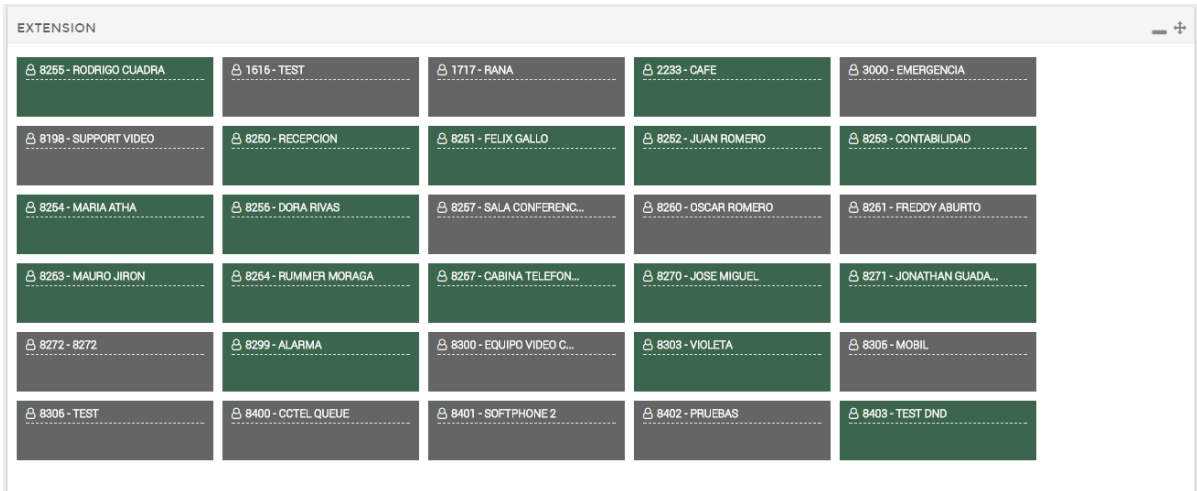
The Console mode only shows the extensions and their status, it does not show the number they are talking with, this is very useful to use as an operator console.
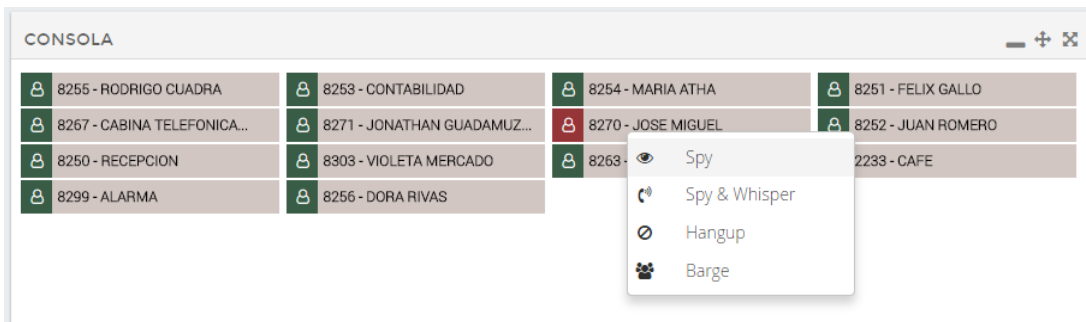
Possible actions (Right Click over the button)

- Call, call to selected extension
- Blind Transfer, transfer the call to the selected extension.
- Attended Transfer, transfer the call to the selected extension with supervision.
- Spy, spy selected extension.
- Spy & Whisper, spy selected extension with whisper.
- Hang-Up, hang up the call.

1.7.4 Queues

Show all Queues
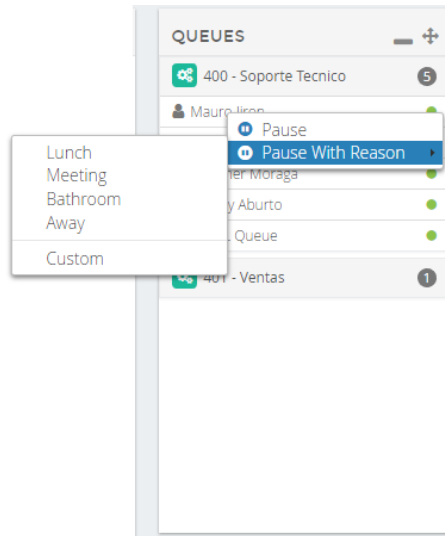
Possible actions (Right Click over Icon or Over the Member)

- To add a Dynamic Member just click over the Icon of the Queue.
- To Remove Dynamic Member just click over the Member and remove it.
- To Pause or Un-Pause the Agent just click over the Agents.

1.7.5 Conferences

Show all the conferences
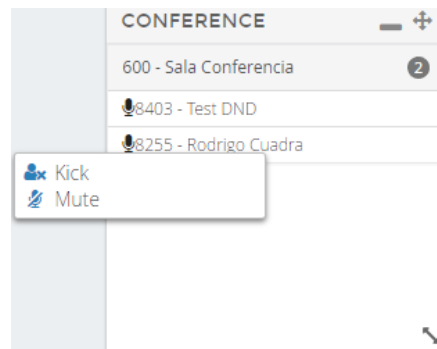
Possible actions (Right Click over Conference Member)

- Kick, remove the Member
- Mute, put the Member in mute
- Un-Mute, remove the mute from the member.

1.7.6 Parking Lots

Show all the Parking Lots

Possible actions (Right Click over parking Number)

- Pickup, take the call.

1.7.7 Queues Stats Summary

Show complete information about the Queues.

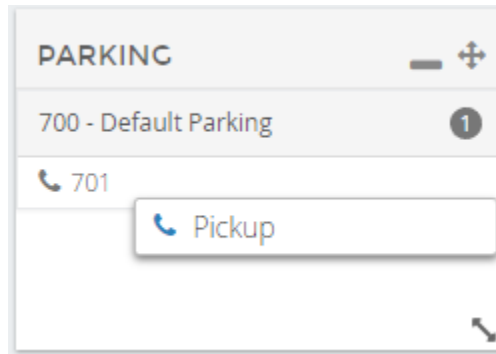| QUEUES STATS SUMMARY										
Queue	Strategy	LoggedIn Members	Available Members	Queued Calls	Completed Calls	Abandoned Calls	Service Level	Longest Hold Time	Hold Time	Talk Time
400 - Soporte Tecnico	Ring All	5	5	0	1	3	0.0	00:00:00	1	0
401 - Ventas	Ring All	1	1	0	0	0	0.0	00:00:00	0	0

Information:

- Queue, number and name of the Queue.
- Strategy, Ring Strategy of the Queue.
- Logged In members, Quantity of members that are logged in the Queue.
- Available Members, Quantity of members that are available in the Queue.
- Queue Calls, current calls in the Queue.
- Completed Calls, completed calls in the Queue.
- Abandoned Calls, abandoned calls in the Queue.
- Service Level, percentage of calls answered before a certain quantity of seconds.
- Longest Hold Call, call that has the most time in queue
- Hold Time, total hold time.
- Talk Time, total talk time.

1.7.8 Queue Members Summary

Show all the Agents with their current status.

QUEUE MEMBERS SUMMARY					— ✛
Member	Status	InCall	Calls Taken	Last Call	Paused Reason
8261 - Freddy Aburto	🟢	No	0	--	
8263 - Mauro Jiron	🟢	No	0	--	
8260 - Oscar Romero	🟢	No	0	--	
8264 - Rummer Moraga	🟢	No	0	--	
8400 - CCTEL Queue	🟢	No	0	--	
8255 - Rodrigo Cuadra	🔴	--	0	0	--

Information:

- Member, extension and name of the Agent.
- Status, Green → Available, Red → Unavailable, Yellow → Pause
- InCall, show if Agent is in call.
- Calls Taken, quantity of calls taken by the Agent.
- Last Call, show the last call attended by the Agent.
- Pause Reason, if the Agent is in pause, it shows the reason.

1.7.9 Queue Calls
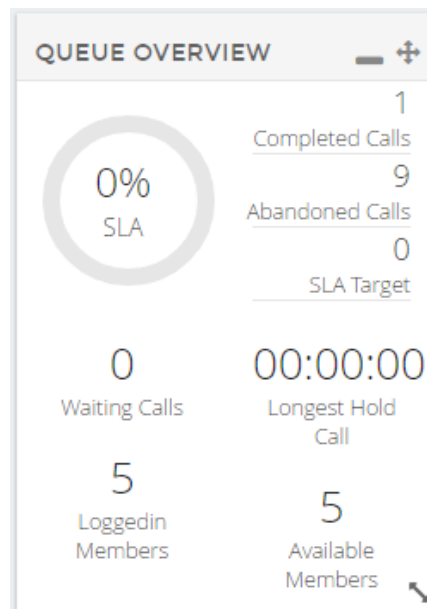
Show current calls in the Queue.
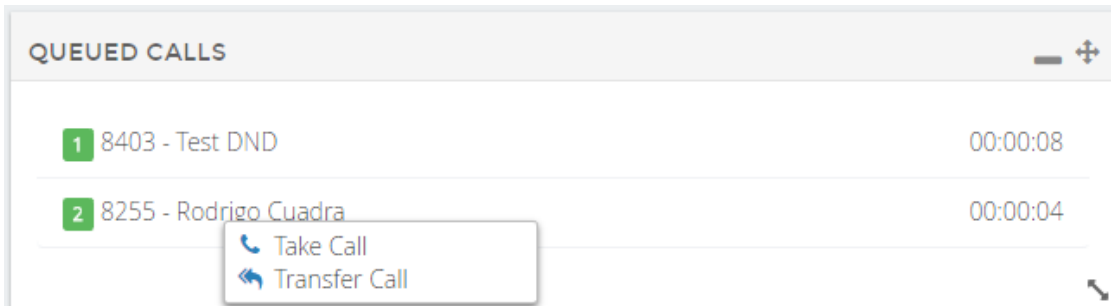
Possible actions (Right Click over Number)

- Take Call, take the call.
- Transfer Call, transfer the call to the selected Agents.

1.7.10 Queue Overview

Show statistics information about the Queue.

Information:

- Service Level, percentage of call answered before certain quantity of seconds.
- Completed Calls, completed calls in the Queue.
- Abandoned Calls, abandoned calls in the Queue.
- SLA Target, Number of seconds before which the call should be answered
- Waiting Calls, current calls in the Queue.
- Longest Hold Call, call that has the most time waiting in queue
- Logged In Members, Quantity of members that are logged in the Queue.
- Available Members, Quantity of members that are available in the Queue.

1.7.11 Queues Call Counter

Show real time Queue calls counter.

QUEUE COUNTER

Soporte Tecnico
400

1

| 1 | 0 |
| Abandoned Calls | Completed Calls |

Ventas
401

0

| 0 | 0 |
| Abandoned Calls | Completed Calls |

Information:

- Big Number, current calls in the Queue.
- Abandoned Calls, abandoned calls in the Queue.
- Completed Calls, completed calls in the Queue.
- Audio an incoming call

1.7.12 Trunk

In the trunk Widget you can see the activity of the SIP, IAX and Dahdi trunks. Below we show an image of how it would look when there is activity.

The green box shows the trunk technology, in case Dahdi shows the number of channels in the trunk, this box changes to red when a channel is busy. The gray circle shows the number of busy channels.
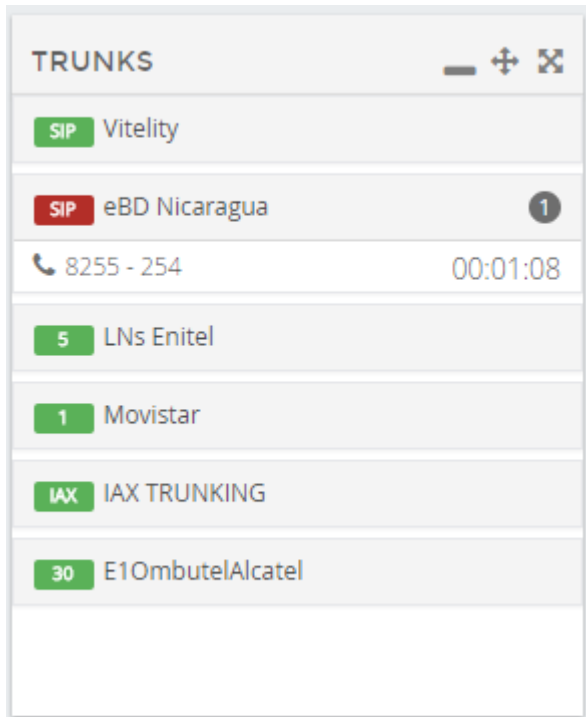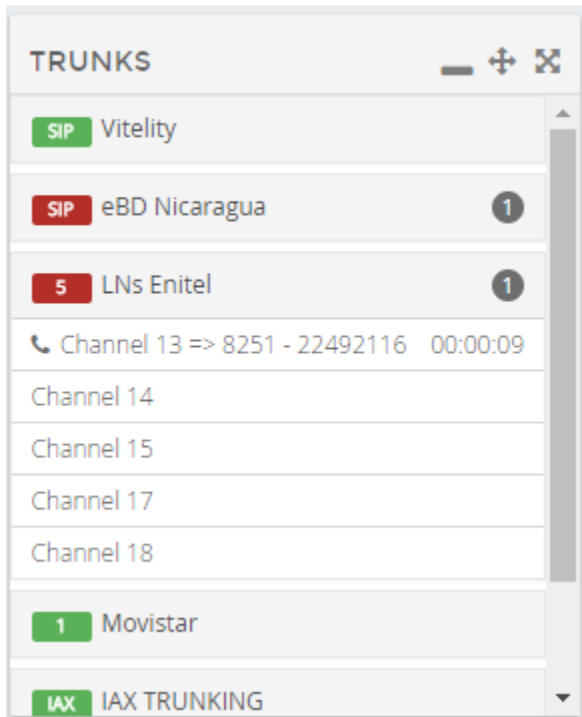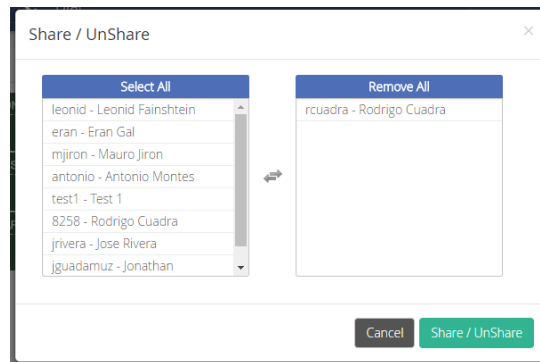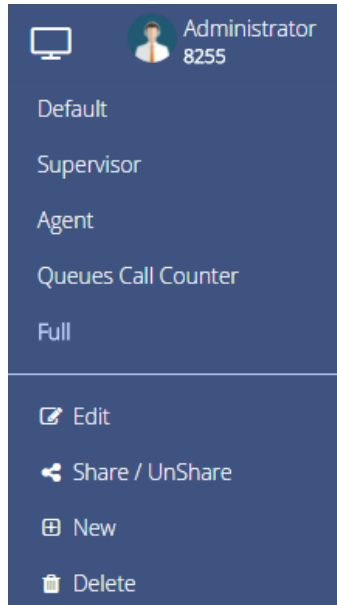
1.7.13 Queue Wallboard

Shows the status of each queue in real time. The data shown is shown below:
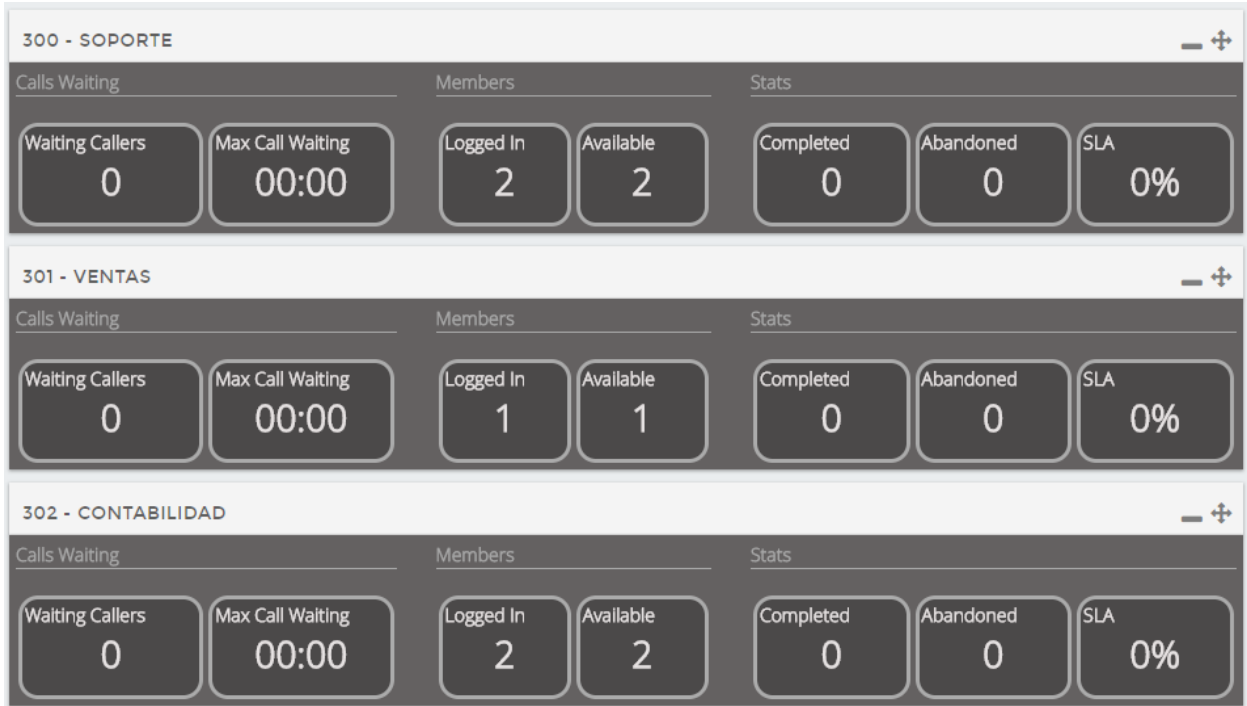
1.8 Layout Management

You can manage the Layout by pressing the 🖥 button. If you want to edit the Layout, first choose the Layout and then select Edit.

Possible options:

- Edit, change the arrangement or the size of the Widgets, also add a new Widget.
- Share/Un-Share, Share Layout with other users.
- New, create new Layout
- Delete, delete the current Layout.

Note:

You cannot edit or delete the Default Layout.

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