# Call Rules

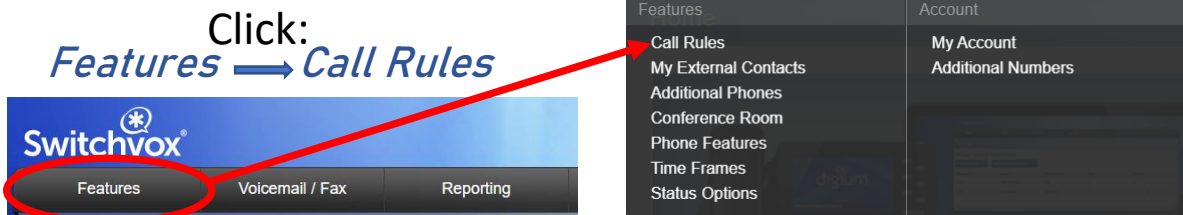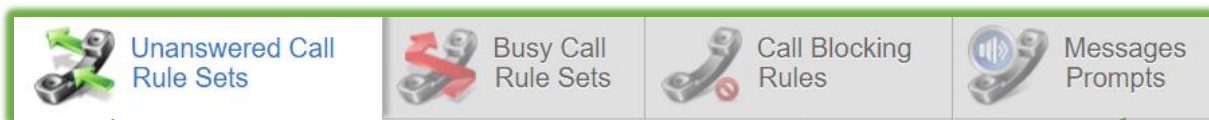**Call Rules** control what happens to your incoming calls.

> **By default, regardless of date and time:**
> - If your Status is **Do Not Disturb**, *queue calls* are declined and *direct calls* go immediately to voicemail.
> - If you are in any other Status, all calls go to voicemail after **5** rings.

## Log onto your Switchvox User Portal.

Switchvox

Welcome, Matt (128)

Features | Voicemail / Fax | Reporting | Switchboard ✓

Home

### Click:
*Features* ➡ *Call Rules*

Switchvox

Features | Voicemail / Fax | Reporting

**Features**
- Call Rules
- My External Contacts
- Additional Phones
- Conference Room
- Phone Features
- Time Frames
- Status Options

**Account**
- My Account
- Additional Numbers

## When clicked, a series of tabs appear:

Unanswered Call Rule Sets | Busy Call Rule Sets | Call Blocking Rules | Messages Prompts

**Unanswered Call Rule Sets**
Specify what happens when a call reaches your extension, and you are not already on a call. You can set up actions that happen after a certain number of rings, or actions that happen immediately.

**Busy Call Rule Sets**
Triggered when your extension is active in some way (on the phone, phone is ringing, calls on hold, etc.). Switchvox only uses these rule sets if you have Use Unavailable Call Rule Sets set to NO. Unavailable means that your phone extension isn't active any way, but you did not answer the phone.

**Block Numbers**
Specify phone numbers for which you do not want to accept calls. You can block specific phone numbers, or any numbers that begin with the same prefix. You can also choose how Switchvox handles the blocked calls.

**Create Sounds for Prompts**
These sound prompts are used in your Call Rules' *Secret Code* actions. You can change the prompts by recording your own sound over your phone or uploading a new sound file.

# Creating a Call Rule

Click **"Create Call Rule Set."** *(Located underneath tabs)*

**Create Call Rule Set**

**General Settings** ❓

| | |
|---|---|
| Rule Set Name *Example: On Vacation* | [ ] |
| Rule Set Time Frame *When is this rule set used?* | Anytime ▶ |
| Rule Set Status *What your current status is set as.* | 📖 Any ▶ |

**Save Call Rule Set** ✓

**Input name of the Call Rule you are creating.**

**Input when you would like the Call Rule to take effect.**
*"Anytime" is most commonly used*

**Input what *Status* you would like to set to make the Call Rule work.**

Click "Save Call Rule Set" to Continue.

In the following example, we will set a Call Rule to have my Mobile Softphone App ring *(instead of desk phone)* when I change my Status to *"Available>Mobile"*.

| | |
|---|---|
| Rule Set Name *Example: On Vacation* | Mobile Softphone |
| Rule Set Time Frame *When is this rule set used?* | Anytime ▶ |
| Rule Set Status *What your current status is set as.* | 👤 Available > Mobile ▶ |

**Save Call Rule Set** ✓

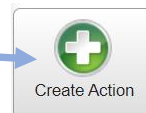**Named the Rule *"Mobile Softphone"* to help explain what the rule does.**

**Leave Time Frame as "Anytime"**
*(Will be used ANYTIME you are in a particular STATUS)*

**Rule will take effect when I change my Status to *"Available>Mobile"*.**
*(Custom created Status: See User STATUS Guide)*

Now that a **Call Rule** is set up, we now have to teach the phone how to operate.

Click **"Create Action"**

**Create Action**

## Choose the type of *action* you would like the phone to perform:

**Please choose a type**

| 📞 Send to Voicemail | Sends call directly to Voicemail. |
|---|---|
| 🔄 Call Forward | Forwards call to another Switchvox Extension. |
| 📱 Call Cascade | If call is not answered on one device, it is forwarded to another. |
| 🔢 Secret Code | Callers must enter a code *(provided by you)* to reach your extension. |
| 🔗 Ring All | Simultaneously rings up to (3) extensions or external phone numbers. |
| 👎 Decline | Declines incoming calls. |

To have all incoming calls go to my *Sangoma Connect* Mobile Softphone app *(instead of my desk phone)*
I will choose the **Ring All** action.

**Ring All Options** ?

| | |
|---|---|
| Type of call | Direct Calls ▸ |
| Numbers to Ring<br>Choose system extensions or manually<br>enter a phone number<br>Note: Append an outgoing prefix number for<br>external calls. Often the digit "9". | Type to search or create a value  ➕ 🔍 |
| | **Number** ▾   **Type** |
| Number of times to ring previous rule<br>before ringing extensions | 5 rings ▸ |
| Attempt to preserve Caller ID<br>Attempt to pass an external incoming caller<br>ID to an external outgoing call. | NO |

**TYPE OF CALL**

**DIRECT CALLS**
- Someone who calls your Direct Dial #.
- Someone dials your Extension Directly.
- Directly Transferred calls from co-workers.

**QUEUE CALLS**
- Calls that are routed to your extension after the caller follows the prompts from the auto-attendant.

**ALL CALLS**
- Both *DIRECT* and *QUEUE* calls

**Enter Extension Number of Your Softphone**
*(Created by your Admin)*
*[You can add multiple numbers if you would like multiple devices to ring at same time]*

**Keep same Caller ID**
That your desk phone would see
when you receive an incoming call.

**Number of Times You Want Your Phone to Ring** before initializing this Call Rule
*(Most times you want this to initiate immediately)*

When you are finished setting the **action**, press  **Save Action ✓**  then  ◀ Back to Call Rules

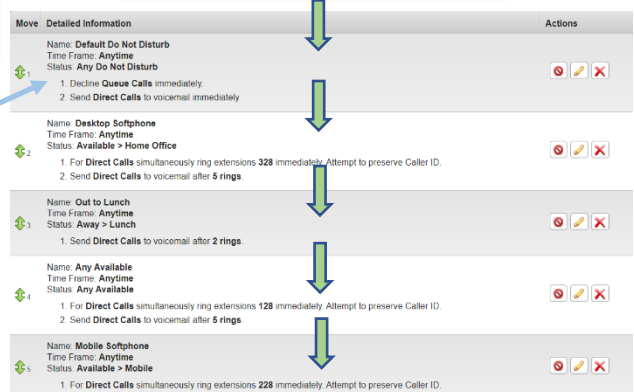| Move | Detailed Information | Actions |
|---|---|---|
| ⬍1 | **Name: Default Do Not Disturb**<br>**Time Frame: Anytime**<br>**Status: Any Do Not Disturb**<br>1. Decline *Queue Calls* immediately.<br>2. Send *Direct Calls* to voicemail immediately. | 🚫 ✏️ ✖️ |
| ⬍2 | **Name: Desktop Softphone**<br>**Time Frame: Anytime**<br>**Status: Available > Home Office**<br>1. For *Direct Calls* simultaneously ring extensions 328 immediately. Attempt to preserve Caller ID.<br>2. Send *Direct Calls* to voicemail after **5 rings**. | 🚫 ✏️ ✖️ |
| ⬍3 | **Name: Out to Lunch**<br>**Time Frame: Anytime**<br>**Status: Away > Lunch**<br>1. Send *Direct Calls* to voicemail after **2 rings**. | 🚫 ✏️ ✖️ |
| ⬍4 | **Name: Any Available**<br>**Time Frame: Anytime**<br>**Status: Any Available**<br>1. For *Direct Calls* simultaneously ring extensions 128 immediately. Attempt to preserve Caller ID.<br>2. Send *Direct Calls* to voicemail after 5 rings. | 🚫 ✏️ ✖️ |
| ⬍5 | **Name: Mobile Softphone**<br>**Time Frame: Anytime**<br>**Status: Available > Mobile**<br>1. For *Direct Calls* simultaneously ring extensions 228 immediately. Attempt to preserve Caller ID. | 🚫 ✏️ ✖️ |

You will see your **NEW** Call Rule at
the bottom of all of the *Call Rules.*

⭐ The *most important* aspect to ⭐
understand about Call Rules is that the
system checks the rules *(*and actions in
each rule)* in the sequence in which they
are listed. Even if the rule/action was
created, it must be placed in the proper
order of Call Rules otherwise that rule
will never take place.

**Incoming Call order:**

Call Rules work in a *TOP to BOTTOM* format. A call comes
in and will "check" Rule 1 first, then Rule 2, and so on.

In this Case, a call will come through and FIRST check and
see if I am in **"Do Not Disturb"** mode. If I am, my phone will:
*1) Decline Queue Calls Immediately.*
*2) Send Direct Calls to Voicemail immediately.*
If I am **NOT** in **"Do Not Disturb"** mode, it will check the next
rule(s) until it finds the **STATUS** I am currently in.

| Move | Detailed Information | Actions |
|---|---|---|
| ⬍1 | **Name: Default Do Not Disturb**<br>Time Frame: Anytime<br>Status: Any Do Not Disturb<br>1. Decline *Queue Calls* immediately.<br>2. Send *Direct Calls* to voicemail immediately | 🚫 ✏️ ✖️ |
| ⬍2 | **Name: Desktop Softphone**<br>Time Frame: Anytime<br>Status: Available > Home Office<br>1. For *Direct Calls* simultaneously ring extensions 328 immediately. Attempt to preserve Caller ID.<br>2. Send *Direct Calls* to voicemail after **5 rings** | 🚫 ✏️ ✖️ |
| ⬍3 | **Name: Out to Lunch**<br>Time Frame: Anytime<br>Status: Away > Lunch<br>1. Send *Direct Calls* to voicemail after **2 rings**. | 🚫 ✏️ ✖️ |
| ⬍4 | **Name: Any Available**<br>Time Frame: Anytime<br>Status: Any Available<br>1. For *Direct Calls* simultaneously ring extensions 128 immediately. Attempt to preserve Caller ID.<br>2. Send *Direct Calls* to voicemail after 5 rings. | 🚫 ✏️ ✖️ |
| ⬍5 | **Name: Mobile Softphone**<br>Time Frame: Anytime<br>Status: Available > Mobile<br>1. For *Direct Calls* simultaneously ring extensions 228 immediately. Attempt to preserve Caller ID. | 🚫 ✏️ ✖️ |

Every User has a default *Call Rule* named **Default Standard**.



Name: **Default Standard**
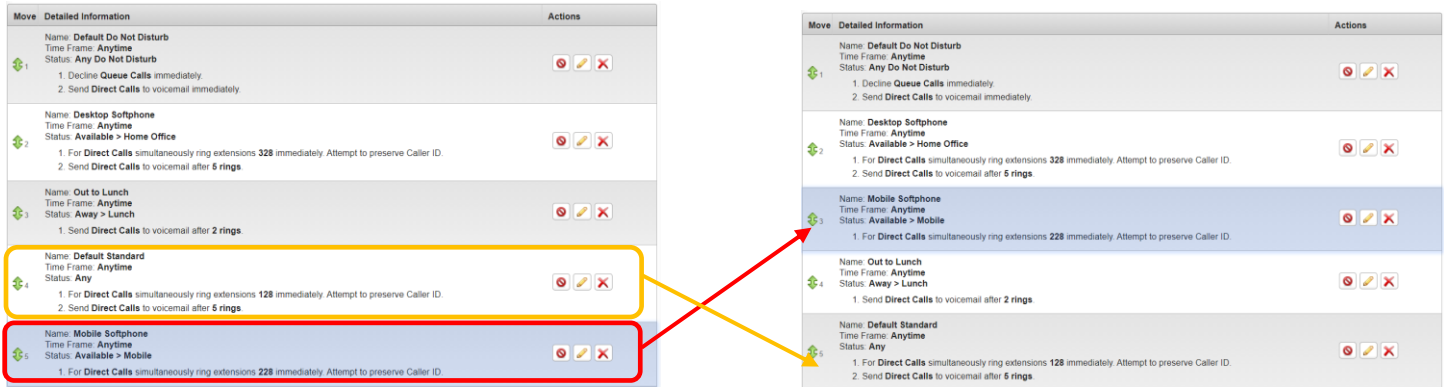Time Frame: **Anytime**
Status: **Any**
  1. Send **Direct Calls** to voicemail after **5 rings**.

This default **Call Rule** sends **DIRECT** calls to your extension's *voicemail* after (5) rings.

Since it says that his rule will work when you are in *ANY* status, it is important that you keep this rule at the bottom, so the incoming call checks **ALL** other rules BEFORE this rule.

*Using the*  *next to each call rule, click and hold, then drag the call rule into the proper order.*



*Now that it is in the correct order, an incoming call will first check:*

**Call Rule 1** - Is phone in *Do Not Disturb*? *(YES-it will follow actions. NO – it will go to Rule 2)*

**Call Rule 2** – Is phone in *Available>Home Office*? *(YES-it will follow actions. NO – it will go to Rule 3)*

**Call Rule 3** – Is phone in *Available>Mobile*? *(YES-it will follow actions. NO – it will go to Rule 4)*

**Call Rule 4**- Is phone in *Away Lunch*? *(YES-it will follow actions. NO – it will go to Rule 5)*

**Call Rule 5** – **FINAL RULE** – Is phone in *ANY* Status?

*(It will always be YES. You are always in a "Status")*

*Call Rules are fully customizable to the preferences of each user!*

Switchvox is a very *"user friendly"* system.
If you ever need additional information about a specific feature:



Click a help icon for feature reference info



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