

vitalpbx.com



SonataSuite

Switchboard



Real Time
MONITORING

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Introduction

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.

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

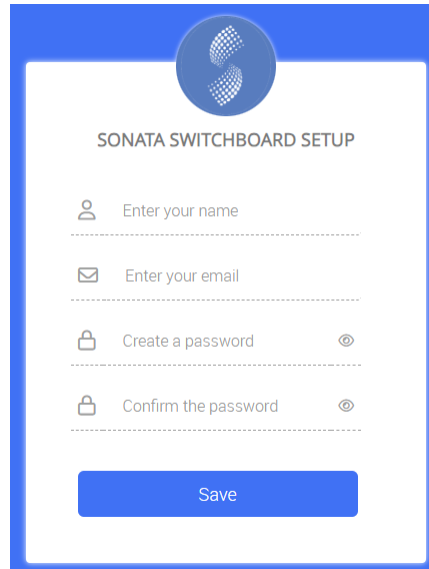
- **SwitchBoard**
- Call Accounting
- Recording Management System
- Stats (Call Center Reports)
- Dialer

1. – Installation

In your VitalPBX go to Admin/Add-ons/Add-ons, select Sonata Switchboard and press the install button  shown in the Actions column. Wait a couple of minutes and then click the Sonata Switchboard link and start configuring.

1.1.- Press URL

Press the URL in the Add-ons list.

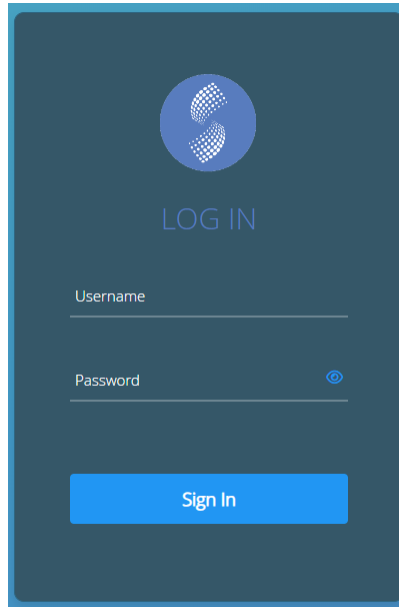


The screenshot shows a web form titled "SONATA SWITCHBOARD SETUP". At the top center is a circular logo with a blue and white pattern. Below the title are four input fields, each with a small icon to its left: a person icon for "Enter your name", an envelope icon for "Enter your email", a padlock icon for "Create a password", and another padlock icon for "Confirm the password". Each field has a dotted line below it indicating the input area. To the right of the password fields are small eye icons for toggling visibility. At the bottom of the form is a blue button labeled "Save".

The first time we enter we must add the following information.

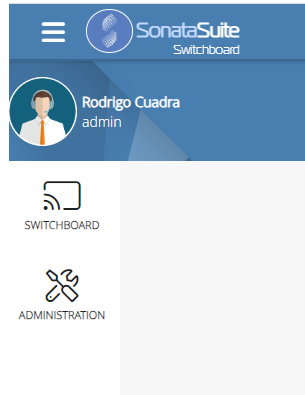
- **Enter your name,** Enter your full name.
- **Enter your email,** Enter your email address.
- **Create a password,** Enter the password to be used by the **admin** user.
- **Confirm the password,** Confirmation of password entered previously.

Login with the Username **admin** and password previously created.



The image shows a login form for Sonata Switchboard. At the top is a circular logo with a stylized 'S' made of dots. Below the logo is the text 'LOG IN'. There are two input fields: 'Username' and 'Password'. The 'Password' field has a small eye icon to its right. At the bottom is a blue button labeled 'Sign In'.

2.- Administration



2.1.- Users

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

GENERAL ☰

<p>Full Name * <input type="text"/></p> <p>Username * <input type="text"/></p> <p>E-mail <input type="text"/></p> <p>Password * <input type="password"/></p> <p>Repeat Password * <input type="password"/></p> <p>Role <input type="text" value="Administrator"/></p> <p>Tenant <input type="text" value="VitalPBX"/></p>	<p>Layout <input type="text" value="Default"/></p> <p>Assigned Extension <input type="text" value="None"/></p> <p>Supervisor's Extension <input type="text" value="None"/></p> <p>Timezone <input type="text" value="(GMT +0:00) UTC"/></p> <p>Language <input type="text" value="English"/></p> <p>Queues Sound Notification <input type="checkbox"/></p> <p>Active Account <input checked="" type="checkbox"/></p>
---	--

Fill the following information:

- **Full name**, full name of the person.
- **Username**, username to login to the application.
- **E-mail**, Email associated with the user.
- **Password**, password to login to the application.
- **Repeat Password**, confirm password to login to the application.
- **Role**, select the role (created previously).
- **Tenant**, allows you to define to which tenant belongs to this user. When this user logged into to the platform, it will be able to only see info for the tenant assigned.
- **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.
- **Supervisor's Extension**, the users with a supervisor assigned will be able to request help to its supervisor from the.
- **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.

2.2.- 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.

Fill the following information:

- Role Name,
- **Update Profile**, If checked, the users with this role assigned will be capable to configures its own user settings.
- **Share Layouts**, Defines if the users with this role will be able to share its layouts with others users.
- **Layouts Creation**, If checked, the users withs this role assigned will be able to create its own layouts
- **Default layout**, If checked, the users withs this role assigned will be able to access to the default layout.
- **Agent Mode**, If checked, the users with this role won't be able to execute any actions on the widgets except on their own extension.
- **Menu Access**
 - **Switchboard**, Gives access to the Switchboard, seeing PBX activity in real time.

- **Users**, Gives permissions to create users.
- **Roles**, Gives permissions to create Roles for users.
- **Settings**, Gives permissions to create Pause Causes and modify the menu context trigger.
- **Licensing**, Gives permissions to activate/revoke or view license status.

Then in the Privileges, we have two options. One, the items included in the Role, and the second include Actions.

Next we are going to select the different privileges that the user will have at the level of Extensions, Queues parking lots, Conference and Trunks.

- **Extensions**, Allow you to define the allowed **Extensions** by this role.
- **Queues**, Allow you to define the allowed **Queues** by this role.
- **Parking Lots**, Allow you to define the allowed **Parking Lots** by this role.
- **Conferences**, Allow you to define the allowed **Conferences** by this role.
- **Trunks**, Allow you to define the allowed **Trunks** by this role.

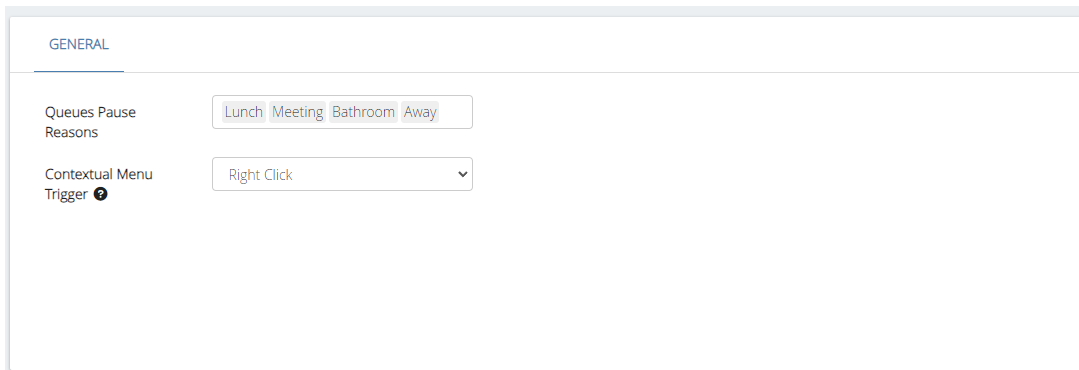
In Extensions Actions, we have:

- **Extensions Actions**, Allow you to define the allowed **Extensions** actions by this role.
 - Originate Call,
 - Spy,
 - Spy with Whisper,
 - Hang-up,
 - Pickup Call,
 - Transfer,
 - Supervise Transfer,
- In Queue Actions, Allow you to define the allowed **Queues** actions by this role.
 - Add Member,
 - Remove Member,
 - Pause/Unpause Agent,

- In Parking Action, Allow you to define the allowed **Parking Lots** actions by this role.
 - Un-park
- In Conferences Actions, Allow you to define the allowed **Conferences** actions by this role.
 - Kick,
 - Mute/Un-Mute,
- In Queue Calls Action, Allow you to define the allowed **Queued Calls** actions by this role.
 - Take Call,
 - Transfer Calls
- Trunk Actions,
 - Hangup,

2.3.- 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.



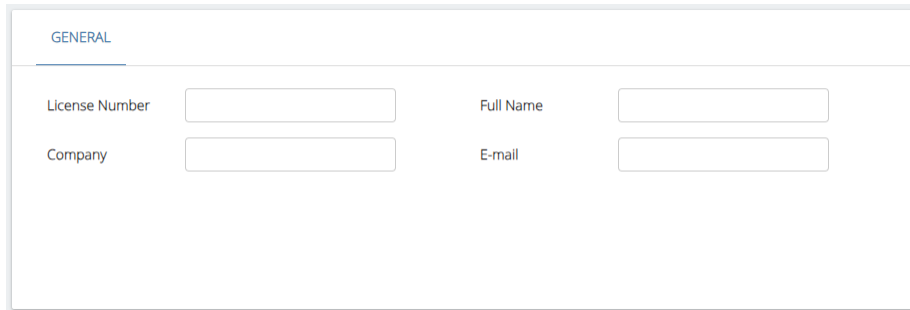
The screenshot shows the 'GENERAL' settings section. Under 'Queues Pause Reasons', there is a multi-select box with the following options: Lunch, Meeting, Bathroom, and Away. Under 'Contextual Menu Trigger', there is a dropdown menu with 'Right Click' selected.

Fill the following information:

- **Queues pause Reasons**, add the different pause reasons.
- **Contextual menu Trigger**, specifies what event on widgets elements triggers the context menu.

2.4.- 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.vitalpbx.org>.



The screenshot shows a web form titled "GENERAL" with a blue underline. It contains four input fields arranged in a 2x2 grid. The top row has "License Number" and "Full Name". The bottom row has "Company" and "E-mail". Each label is positioned to the left of its corresponding input box.

3.- Switchboard

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:

- Extensions
- Queues
- Conferences
- Parking Lots
- Queues Stats Summary
- Queue Calls
- Queues Members Summary
- Queue Overview
- Queues Calls Counter
- My Extension
- My Queues
- Trunks
- Queue Wallboard
- HTML Embed
- Extensions Summary

The screenshot displays the Sonata Switchboard interface with several key sections:

- MY EXTENSION:** Shows 'No available calls' and a numeric keypad (1-9, *, 0, #) with a call icon.
- EXTENSIONS:** A grid of extension cards for various users, including 2000 - RODRIGO CUADRA, 2001 - EMANUEL LYONS MORGAN, 2002 - ANTONIO MONTES, 2003 - JOSEPH MONTES, 2004 - MIGUEL RIVERA, 2005 - OSCAR ROMERO, 2006 - MAYNOR PERALTA, 2007 - ROGER GAITAN, 2008 - EMANUEL LYONS DELVALLE, and 2009 - SERGIO MARTINEZ.
- ENGLISH:** A performance dashboard for the English queue, showing 0% SLA, 0 Completed Calls, 0 Abandoned Calls, 20 SLA Target, 0 Waiting Calls, and 00:00 Longest Hold Call.
- SPANISH:** A performance dashboard for the Spanish queue, showing 0% SLA, 0 Completed Calls, 0 Abandoned Calls, 20 SLA Target, 0 Waiting Calls, and 00:00 Longest Hold Call.
- TRUNKS:** A list of trunks including Telnyx, MS Teams, and Twilio.
- PARKING LOTS:** A list of parking lots, currently showing '700 - Default Parking'.
- QUEUES STATS SUMMARY:** A table summarizing queue performance.

Queue	Strategy	LoggedIn Members	Available Members	Queued Calls	Completed Calls	Abandoned Calls	Service Level	Longest Hold Time	Hold Time	Talk Time
2900 - VitalPBX English	Round Robin Ordered	1	0	0	0	0	0.0	0	0	0
2901 - VitalPBX Spanish	Round Robin Ordered	2	1	0	0	0	0.0	0	0	0

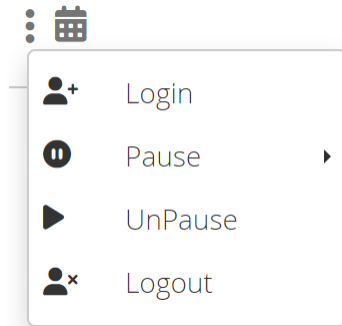
3.1.- My Extension

Shows my extension status and management; Transfer, Park and Hang-up (to activate these options you need to select the call).

The 'MY EXTENSION' panel shows a call in progress with the following details:

- Call ID: 8255 - 8255
- Duration: 00:28
- Actions: Transfer, Park, Hangup
- Navigation: A calendar icon and a left arrow.
- Keypad: A numeric keypad (1-9, *, 0, #) with a call icon at the bottom.





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.

3.2.- My Queues

Shows all the queues to which the extension belongs.

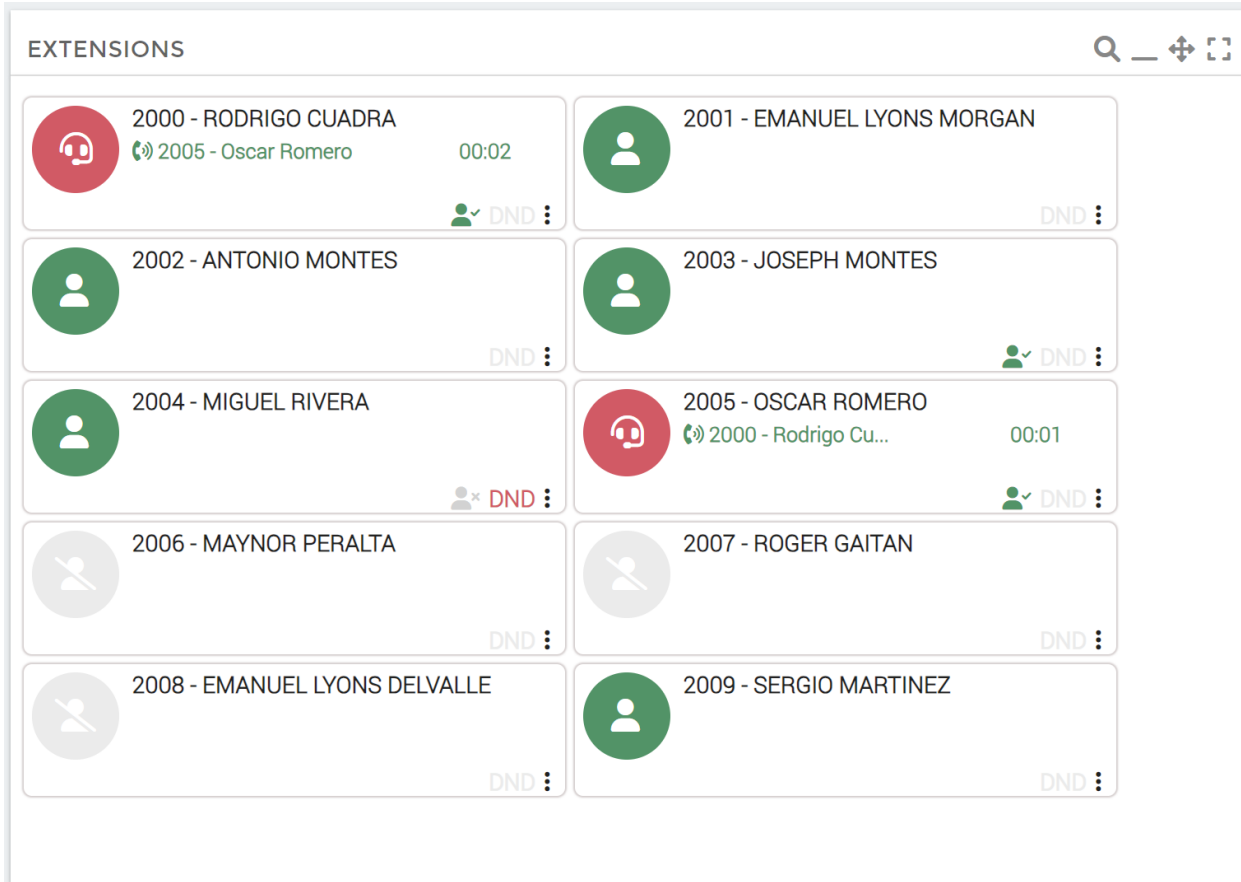
Queue	Status	Calls Taken	Queued Calls	Pause Time
2902 - Music on Hold Test	 <div style="position: absolute; top: 10px; left: 10px; border: 1px solid #ccc; background: white; padding: 5px;"> <ul style="list-style-type: none">  Logout  Pause  Pause With Reason </div>		0	--:--

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

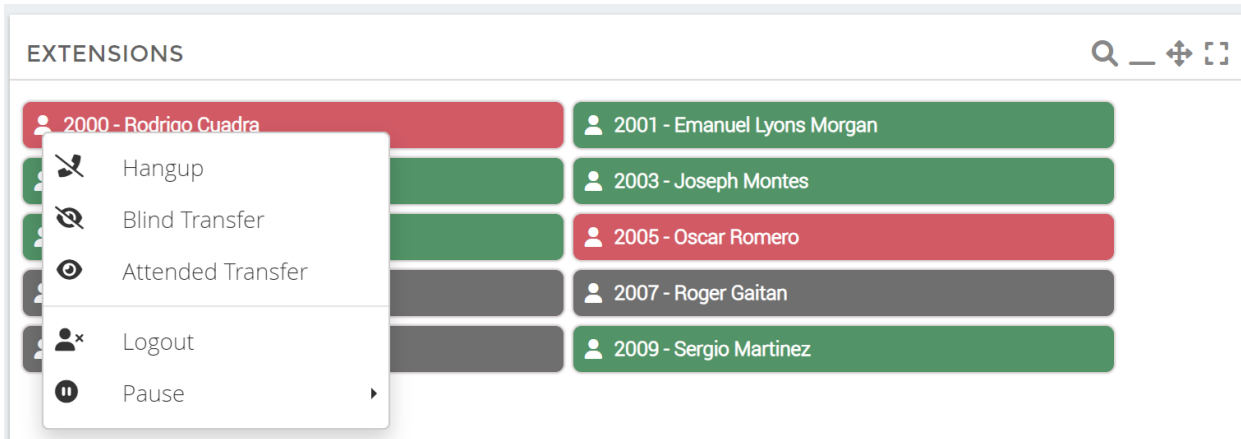
- **Login**, Add the Agent to the Queue
- **Logout**, Remove the Agent off the Queue
- **Pause/UnPause**, Pause or UnPause the Agent on the Queue
- **Pause with Reason**, Pause the Agent on the Queue with specify reason.

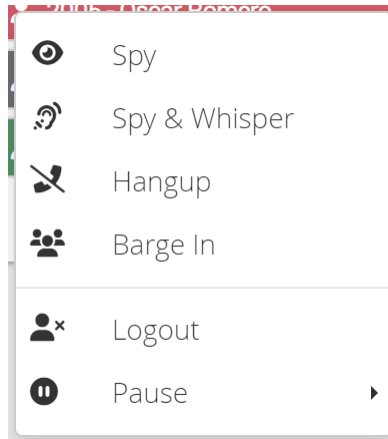
3.3.- Extensions and Console Mode

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.



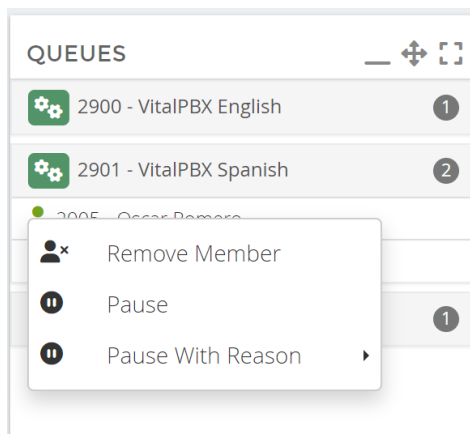


Possible actions (Right Click over the button)

- **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**, Using Chanspy in "whisper" mode, the supervisor can speak directly to the agent without the client hearing.
- **Barge In**, With this feature, the supervisor can join the call and speak to both the agent and the client.
- **Hang-Up**, hang up the call.
- **Login**, Add the Agent to the Queue
- **Logout**, Remove the Agent off the Queue
- **Pause/UnPause**, Pause or UnPause the Agent on the Queue

3.4.- Queues

Show all Queues

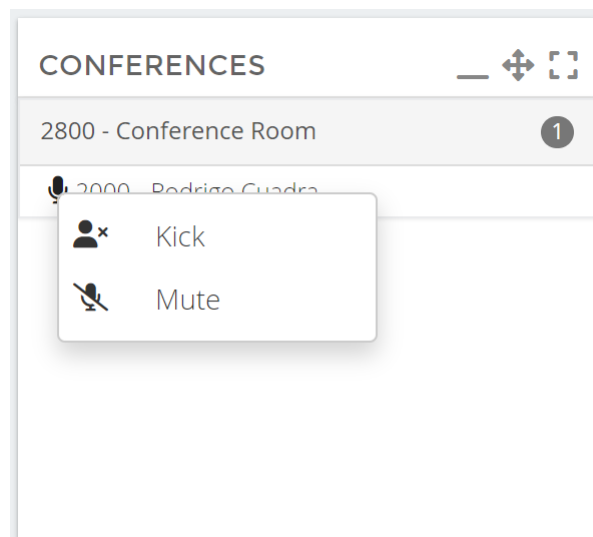


Possible actions (Right Click over Icon or Over the Member)

- 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.

3.5.- Conferences

Show all the conferences

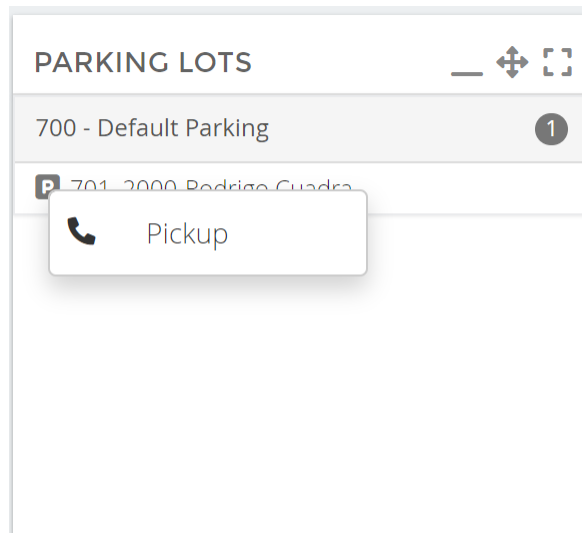


Possible actions (Right Click over Conference Member)

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

3.6.- Parking Lots

Show all the Parking Lots



Possible actions (Right Click over parking Number)

- **Pickup**, take the call.

3.7.- 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
2900 - VitalPBX English	Round Robin Ordered	1	1	0	0	0	0.0	0	0	0
2901 - VitalPBX Spanish	Round Robin Ordered	2	2	0	0	0	0.0	0	0	0
2902 - Music on Hold Test	Round Robin Memory	1	1	0	0	0	0.0	0	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.

3.8.- Queue Members Summary

Show all the Agents with their current status.

QUEUE MEMBERS SUMMARY - 2900								
Member	Status	InCall	Calls Taken	Last Call	Paused Reason	Pause Time	Last Login	Calls History
2003 - Joseph Montes	●	No	0	--		--:--:--	3 days ago	
2005 - Oscar Romero	●	--	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.
- **Pause Time**, How long the Agent has been paused.
- **Last Login**, How long has the Agent been registered in the Queue.
- **Call History**, Shows a history of the Agent's calls.

3.9.- Queue Calls

Show current calls in the Queue.

QUEUED CALLS - 2902 _ + []

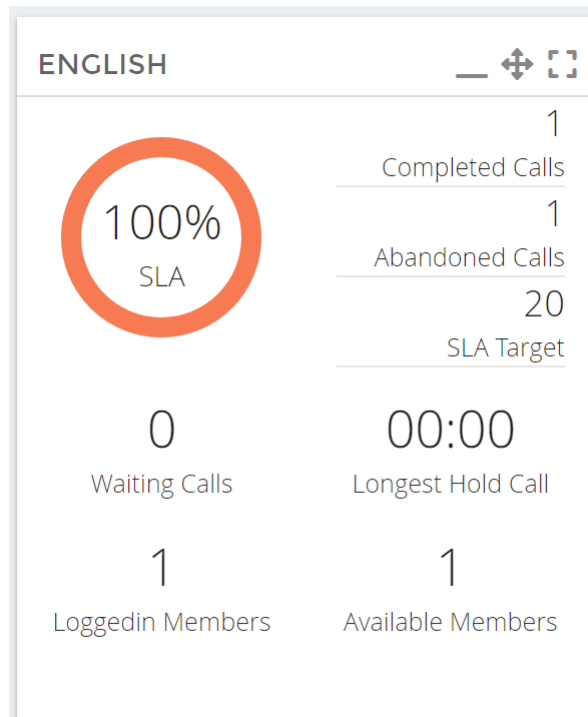
1	<div style="display: flex; align-items: center; justify-content: space-between;"> <div style="display: flex; align-items: center;"> Take Call </div> <div style="display: flex; align-items: center;"> Transfer Call </div> </div>	00:08
--	--	-------

Possible actions (Right Click over Number)

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

3.10.- Queue Overview

Show statistics information about the Queue.

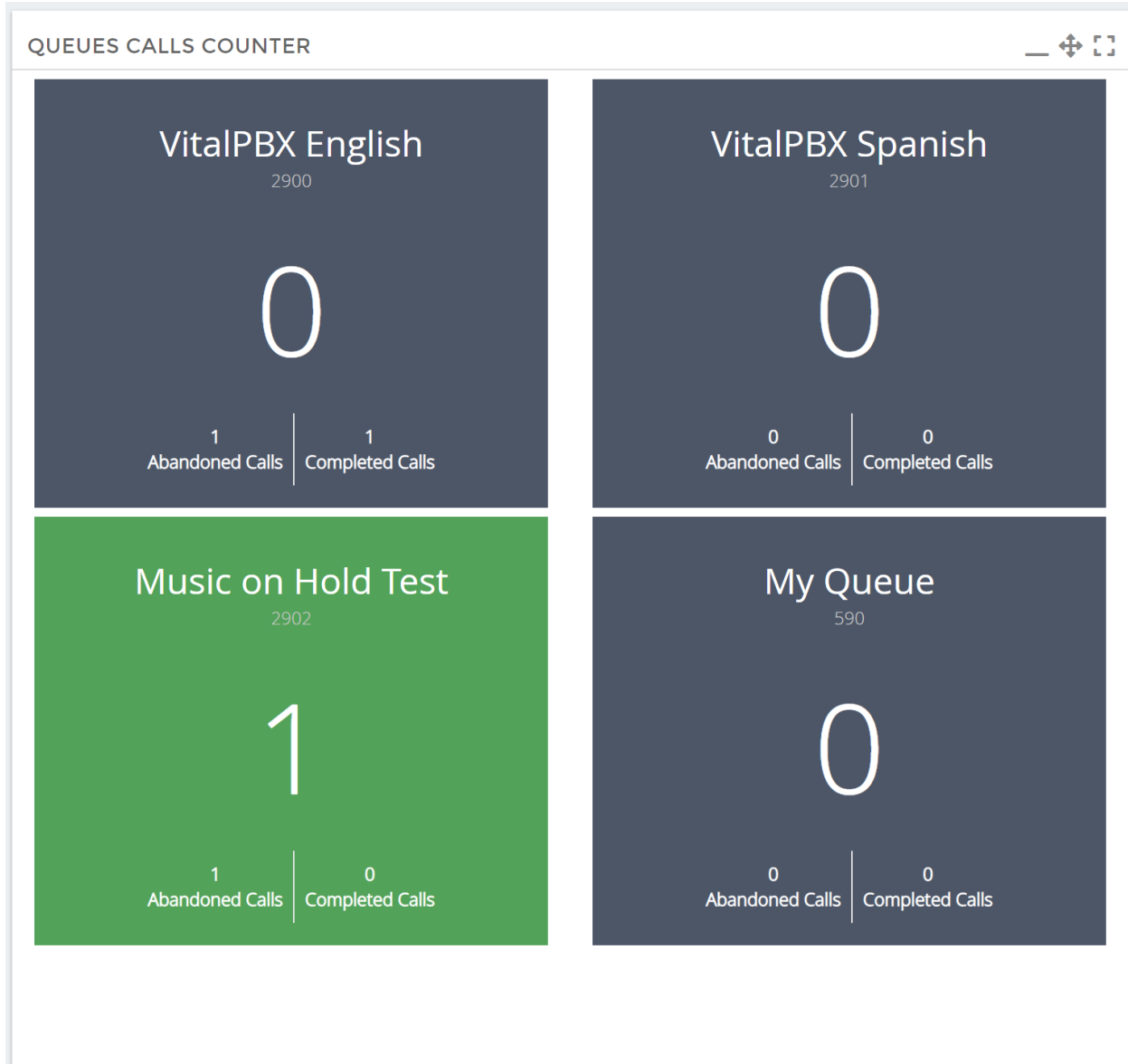


Information:

- **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.

3.11.- Queues Call Counter

Show real time Queue calls counter.



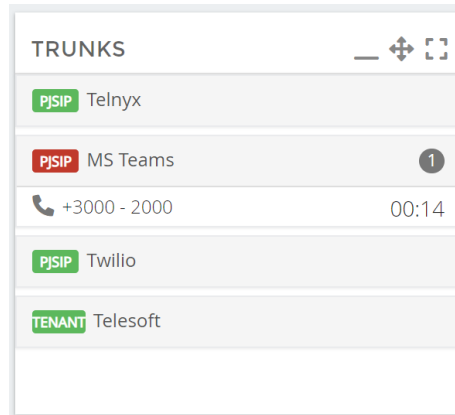
Information:

- **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

3.12.- Trunk

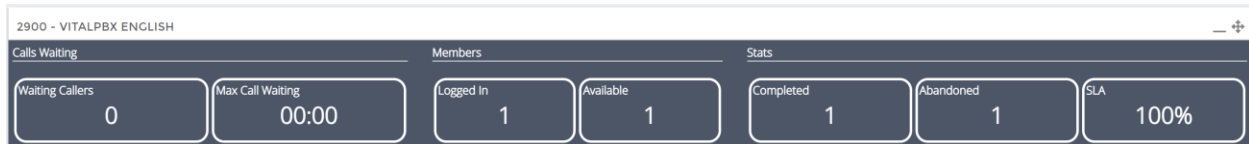
In the trunk Widget you can see the activity of the PJSIP and IAX trunks. Below we show an image of how it would look when there is activity.

The green box shows the trunk technology, the gray circle shows the number of busy channels.



3.13.- Queue Wallboard

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



3.14.- Extensions Summary

Shows a list of the extensions selected when creating the Widget. Details are shown below:

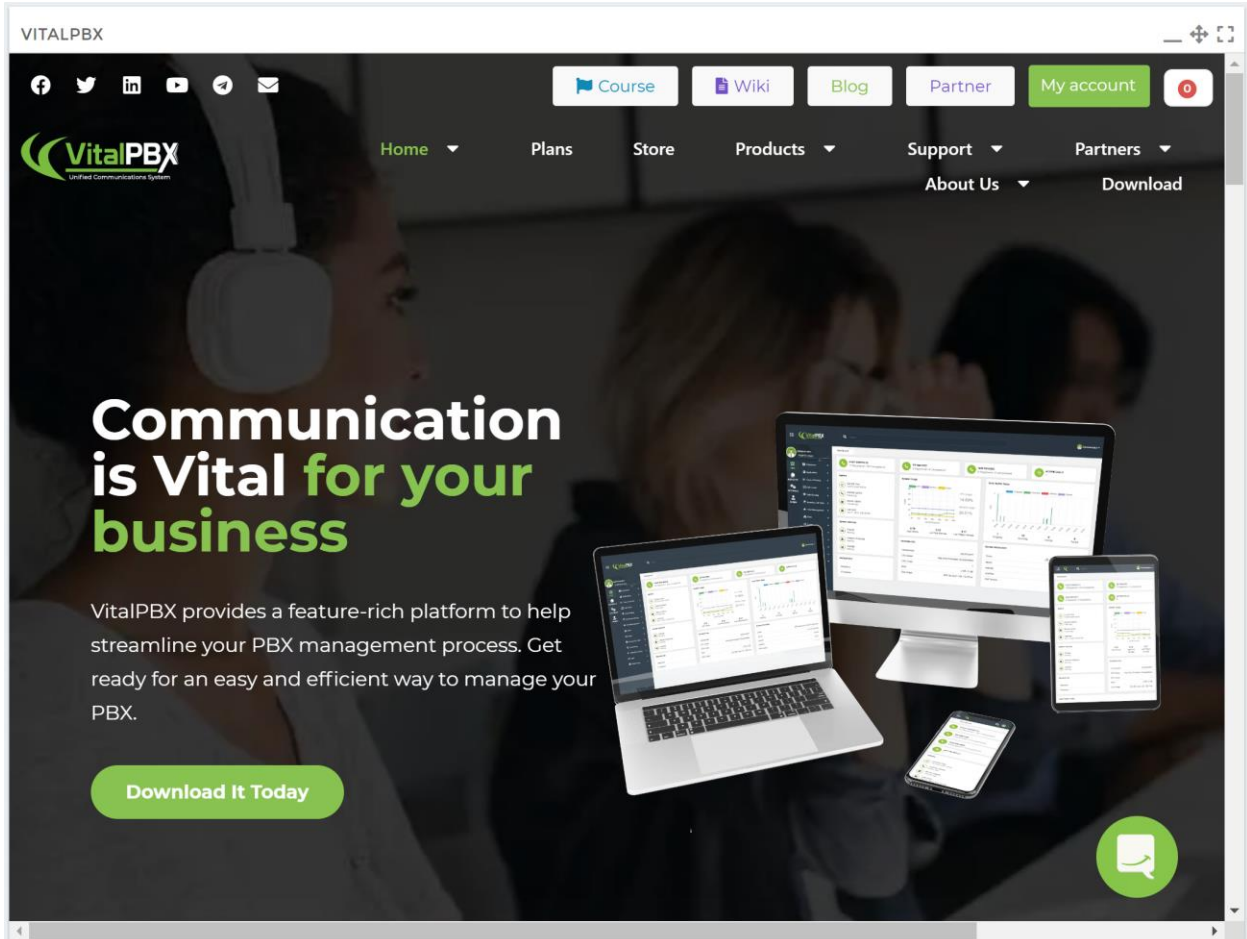
EXTENSIONS SUMMARY											
Extension	Reg. Status	DND	Q. Status	In Call	N. Out Calls	N. In Calls	Total Calls	Last Out Calls	Last In Calls	Pause Reason	Details
2000 - Rodrigo Cuadra	●	●	●	No	2	0	2	4 minutes ago	--	---	📞
2001 - Emanuel Lyons Morgan	●	●	🚫	No	0	0	0	--	--	--	📞
2002 - Antonio Montes	●	●	🚫	No	0	0	0	--	--	--	📞
2003 - Joseph Montes	●	●	●	No	0	0	0	--	--	---	📞
2004 - Miguel Rivera	●	●	●	No	0	0	0	--	--	---	📞
2005 - Oscar Romero	●	●	●	No	0	0	0	--	--	---	📞
2006 - Maynor Peralta	●	●	🚫	No	0	0	0	--	--	--	📞
2007 - Roger Gaitan	●	●	🚫	No	0	0	0	--	--	--	📞
2009 - Sergio Martinez	●	●	🚫	No	0	0	0	--	--	--	📞

Below we will describe each of the columns displayed in the Widget.


- **Extensions**, Extension Number and Name.
- **Reg Status**, Green → Registered, Red → Not registered.
- **DND**, Green → The extension is not available. Gray → The extension is available.
- **Q. Status**, Green → The extension is registered in the queue. Red → the extension is not registered in any queue, Red Man with line → The extension does not belong to any queue.
- **In Call**, Yes → the extension is on a call. No → the extension is free.
- **N. Out Calls**, Number of outgoing calls on the current day.
- **N. In Calls**, Number of incoming calls on the current day.
- **Total Calls**, Number of outgoing and incoming calls on the current day.
- **Last Out Call**, Shows how long ago the last outgoing call of the current day was from the extension.
- **Last In Call**, Shows how long ago the last incoming call was for the current day from the extension.
- **Pause Reason**, Shows the reason for the extension's last pause.
- **Details**, Shows details of incoming, outgoing and internal calls of the extension.

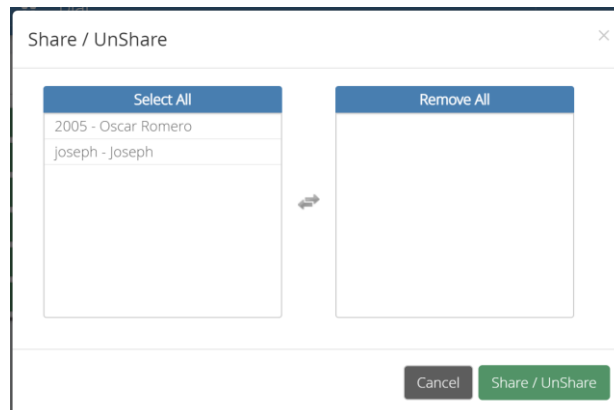
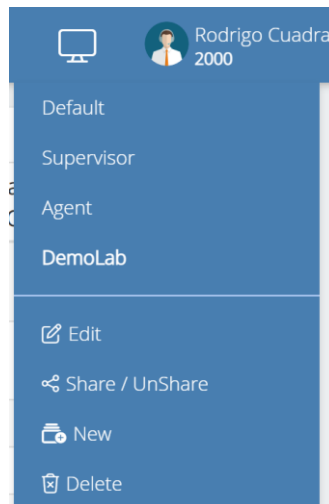
3.15.- HTML Embed

In this Widget you can embed a web page with the objective of easily accessing it from the Switchboard.



4.- 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.

A.- Technical Specification

Name	Sonata Switchboard
Version	4.0.0-1
OS	Linux Debian 11 64 bits
Compatibility	VitalPBX 4.x
Database	MariaDB 10.x
Developed Language	PHP, HTML, NodeJS
Necessary Memory	2 GB
Necessary HDD	250 MB
Packet Technology	DEB
Dependency	Already installed in VitalPBX 4.x