



SURGERY CONNECT

Extensions in the Service Delivery Console Webinar

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Extensions Introduction

- Extension List
- Manual Log In
- Automated Log In
- Shortdial Numbers



Session Agenda

- Accessing the Service Delivery Console
- Accessing Extensions
- Assigning Users
- Assigning a Generic User
- Configuration Console - Extensions

Accessing the Service Delivery Console

Use the Menu or via the Single Sign On
(sso.x-onweb.com)

Select an application

CC Configuration Console https://config.x-onweb.com	R Reports https://reports.x-onweb.com	SD Service Delivery Console https://build.x-onweb.com
SP Soft Phone https://phone.x-onweb.com	SP Support Portal https://support.x-onweb.com	UC User Console https://console.x-onweb.com
V Voicemail https://voicemail.x-onweb.com	W Wallboard https://wallboard.x-onweb.com	X X-flow https://xflow.x-onweb.com

- CC** Configuration Console
- SDC** Service Delivery Console
- SP** Soft Phone
- SP** Support Portal
- UC** User Console
- V** Voicemail
- W** Wallboard
- X** X-flow
- H** Help Centre
- L** Logout

Accessing Extensions

SURGERYCONNECT

Users Extensions Groups Calendars Numbers ☰ JH

Welcome to Surgery Connect

Your surgery has signed up for Surgery Connect - the Cloud-based phone system trusted by hundreds of healthcare providers across the UK.

But Surgery Connect is much more than a desk phone system. Here's what's included for you and your team:

- ✓ Full management of your team members and phone numbers - you're in control of how your system works
- ✓ What's going on in the surgery at a glance - all the stats you could want on your desktop
- ✓ Full integration with patient records (e.g. EMIS, SystemOne) - for seamless phone triage with patients
- ✓ Call from any device you want - desk phone, mobile, landline or our Softphone - it will always come from your surgery number and won't cost you a thing
- ✓ Staff can be located anywhere in the practice, or even work remotely and receive all calls intended for them

Click on the
Extensions menu

Accessing Extensions

SURGERYCONNECT

Users Extensions Groups Calendars Numbers ☰ JH

Extensions

In your contract with Surgery Connect you signed up for new Yealink desk phones which we'll be setting up at your surgery. You can now define who can use each of these.

INTRODUCING YOUR NEW PHONES

Your surgery will be fitted with Yealink phones - the latest in IP telephony with all the features you and your colleagues could need:

- ✓ Four types of phone - standard, reception, cordless and video - your contract will tell you which ones you'll be getting
- ✓ 3-way conference calls (optional)
- ✓ Speakerphone
- ✓ Personal ringtones and voicemail
- ✓ Call hold, Waiting and Transfer
- ✓ All users can log into every desk phone (unless you choose to restrict access) - perfect for hot desking



When accessing the page for the first time, an introduction will be displayed

Accessing Extensions

THINGS TO REMEMBER

- ✓ You'll need to give your phones meaningful names - it's best to name them by the room they'll be used in, for example 'Consultation room 1'.
- ✓ A single desk phone can be used by more than one person, but people should always log into and out of phones so the Surgery Connect system knows who is making and taking the calls.
- ✓ You don't need to wait for your desk phones to make and take calls - Surgery Connect comes with a softphone allowing you to make and receive voice and video calls right in your Web browser, on your PC, tablet or smartphone.
- ✓ By default every person using Surgery Connect can log into each phone - only by choosing specific people or teams do you restrict access.

READY TO GET STARTED?

Manage extensions

Scroll to the bottom of the page and click Manage extensions

Accessing Extensions

Extensions

In your contract with Surgery Connect you signed up for new Yealink desk phones which we'll be setting up at your surgery. You can now define these

Model of Yealink handset installed

Postcode of the site where the extension is installed

Users that will be shown if logging in manually to an extension

Edit options

ALL EXTENSIONS (9) ?

Mass Edit Extension Names

Type	Name / Location	Site	Permitted Users	EMIS PC	Options
	Consultation Room 1	IP139EZ	All users		
	Consultation Room 2	IP139EZ	All users		
		9EZ	All users		
		9EZ	All users		
	Start Room	IP139EZ	All users		

Name of the room/location of the extension

PC name if associated through the Integration software

Assigning Users

SURGERYCONNECT

Users Extensions Groups Calendars Numbers ☰ JH

Extensions

In your contract with Surgery Connect you signed up for new Yealink desk phones which we'll be setting up at your surgery. You can now define who can use each of these.

Need a recap on setting up your extensions? [See our Introduction to extensions](#)

Click the blue pen icon to Edit the required extension

ALL EXTENSIONS (9) ?

Type	Name / Location	Site	Permitted Users	EMIS PC	Opti
	Consultation Room 1	IP139EZ	All users		
	Consultation Room 2	IP139EZ	All users		
	Reception Extension 1	IP139EZ	All users		
	Reception Extension 2	IP139EZ	All users		
	Staff Room	IP139EZ	All users		

Assigning Users

SURGERYCONNECT

Users Extensions Groups Calendars Numbers ☰ JH

Extensions

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Click the dropdown option to see a list of Users

ALL EXTENSIONS (9) ?

Type	Name / Location	Site	Permitted Users	EMIS PC	Options
 T21P	Consultation Room 1 <small>A friendly name / location for this extension</small>	IP139EZ	Select... Outbound Calls Donna Noble	x ▾	✓ ⊘
	Consultation Room 2	IP139EZ	Rose Tyler Liz Shaw		✎
	Reception Extension 1	IP139EZ	Barbara Wright		✎

Assigning Users

SURGERYCONNECT

Users Extensions Groups Calendars Numbers ☰ JH

Extensions

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ALL EXTENSIONS (9) ?

Type	Name / Location	Site	Permitted Users	EMIS PC	Options
 T21P	<input type="text" value="Consultation Room 1"/> <small>A friendly name / location for this extension</small>	IP139EZ	<div style="border: 1px solid blue; padding: 2px;"> Jack Harkness x Donna Noble x Rose Tyler x </div> Outbound Calls Liz Shaw Barbara Wright Susan Foreman Amy Pond	<input type="text" value="x"/> ▼	<input checked="" type="checkbox"/> 🔄
	Consultation Room 2	IP139EZ	Liz Shaw Barbara Wright		
	Reception Extension 1	IP139EZ	Susan Foreman Amy Pond		

Either select the name from the list of Users, or start typing a name to reduce the list

Click the green Tick to save the changes

Assigning Users

SURGERYCONNECT

Users Extensions Groups Calendars Numbers

✓ Success
Extension updated

Extensions

In your contract with Surgery Connect you signed up for new Yealink desk phones which we'll be setting up for your surgery. You can now define who can use each of these.

You will see a
Success or Failure
message

The list of Users will
update on the
Extension when
logging in manually

Need a recap on setting up your extensions? [See our In](#)

ALL EXTENSIONS (9) ?

✎ Mass Edit Extension Names

Type	Name / Location	Site	Permitted Users	EMIS PC	Options
	Consultation Room 1	IP139EZ	3 users		
	Consultation Room 2	IP139EZ	All users		
	Reception Extension 1	IP139EZ	All users		
	Reception Extension 2	IP139EZ	All users		
	Staff Room	IP139EZ	All users		

Assigning a Generic User

Extensions

In your contract with Surgery Connect you signed up for new Yealink desk phones which we'll be setting up at your surgery. You can now define who can use each of these.

Need a recap on setting up your extensions? [See our Introduction to extensions](#)

ALL EXTENSIONS (9) 

 Mass Edit Extension Names

Type	Name / Location	Site	Permitted Users	EMIS PC	Options
	Consultation Room 1	IP139EZ	3 users		
	Consultation Room 2	IP139EZ	All users		
	Reception Extension 1	IP139EZ	All users		
	Reception Extension 2	IP139EZ	All users		
	Staff Room	IP139EZ	All users		
	Standard Extension 3	IP139EZ	All users		

Click the blue pen icon to Edit the required Extension

Assigning a Generic User

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Need a recap on setting up your extensions? [See our Introduction to extensions](#)

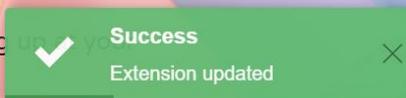
ALL EXTENSIONS (9) ?

Type	Name / Location	Site	Permitted Users	EMIS PC	Options
	Consultation Room 1	IP139EZ	3 users		
	Consultation Room 2	IP139EZ	All users		
	Reception Extension 1	IP139EZ	All users		
	Reception Extension 2	IP139EZ	All users		
 T21P	Staff Room <small>A friendly name / location for this extension</small>	IP139EZ	Select... <small>Specify which users will be able to login to this extension. If no users are selected, all users will be available.</small> 	<input type="checkbox"/>	 
	Standard Extension 3	IP139EZ	All users		

Click Assign
Generic User

Assigning a Generic User

In your contract with Surgery Connect you signed up for new Yealink desk phones which we'll be setting up for your surgery. You can now define who can use each of these.



Need a recap on setting up your extensions? [See our Introduction to extensions](#)

You will see a Success or Failure message

ALL EXTENSIONS (9) ?

Mass Edit

Type	Name / Location	Site	Permitted Users	EMIS PC	Options
	Consultation Room 1	IP139EZ	3 users		
	Consultation Room 2	IP139EZ	All users		
	Reception Extension 1	IP139EZ	All users		
	Reception Extension 2	IP139EZ	All users		
	Staff Room	IP139EZ	Staff Room User		
	Standard Extension 3	IP139EZ	All users		
	Training T21P	-	All users		

Dummy User created and manual log in list updated on the Extension

Assigning a Generic User

SURGERYCONNECT

Users Extensions Groups Calendars Numbers ☰ JH

Extensions

Select Users at the top of the page

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ALL EXTENSIONS (9) ?

[Mass Edit Extension Names](#)

Type	Name / Location	Site	Permitted Users	EMIS PC	Options
	Consultation Room 1	IP139EZ	3 users		
	Consultation Room 2	IP139EZ	All users		
	Reception Extension 1	IP139EZ	All users		
	Reception Extension 2	IP139EZ	All users		
	Staff Room	IP139EZ	Staff Room User		

Assigning a Generic User

Mickey Smith	mickey.smith@royalhopemc.com	224	Supervisor	✓	
Outbound Calls	1@6552.x-on.co.uk			✗	
Rory Williams	rory.williams@royalhopemc.com	214	Standard User	✓	
Rose Tyler	rose.tyler@royalhopemc.com	201	Supervisor	✓	
Ryan Sinclair	ryan.sinclair@royalhopemc.com	211	Standard User	✓	
Staff Room User	87854@q6552.x-on.co.uk	79623	Standard User	✗	
Steven Braithwaite 2	steven.braithwaite@mail.com		Supervisor	✗	
Steven Taylor	steven.taylor@royalhopemc.com	226	Standard User	✗	
Susan Foreman	susan.foreman@royalhopemc.com	204	Standard User	✓	
Tegan Jovanka	tegan.jovanka@royalhopemc.com	236	Standard User with Group Management	✗	
Test User	test.user@royalhopemc.com	299	Standard User with Group Management	✗	
Training T21P User	75487@q6552.x-on.co.uk	38983	Standard User	✗	
Triage 1	triage1@royalhopemc.com	232	Standard User	✗	
Triage 2	triage2@royalhopemc.com	233	Standard User	✗	
Triage 3	triage3@royalhopemc.com	234	Standard User	✗	
Triage 4	triage4@royalhopemc.com	235	Standard User	✗	
Victoria Waterfield	victoria.waterfield@royalhopemc.com	218	Standard User	✗	

Use the blue pen icon to edit the User if necessary

Assigning a Generic User

Mickey Smith	mickey.smith@royalhopemc.com	224	Supervisor	✓	
Outbound Calls	1@6552.x-on.co.uk			×	
Rory Williams	rory.williams@royalhopemc.com	214	Standard User	✓	
Rose Tyler	rose.tyler@royalhopemc.com	201	Supervisor	✓	
Ryan Sinclair	ryan.sinclair@royalhopemc.com	211	Standard User	✓	
Staff Room User	87854@q6552.x-on.co.uk	290	Standard User	×	
The name of this user	The email for this user	The short dial	The role for this user		
Steven Braithwaite 2	steven.braithwaite@mail.com		Supervisor	×	
Steven Taylor	steven.taylor@royalhopemc.com	226	Standard User	×	
Susan Foreman	susan.foreman@royalhopemc.com	204	Standard User	✓	
Tegan Jovanka	tegan.jovanka@royalhopemc.com	236	Standard User with Group Management	×	
Test User	test.user@royalhopemc.com	299	Standard User with Group Management	×	
Training T21P User	75487@q6552.x-on.co.uk	38983	Standard User	×	
Triage 1	triage1@royalhopemc.com	232	Standard User	×	
Triage 2	triage2@royalhopemc.com	233	Standard User	×	
Triage 3	triage3@royalhopemc.com	234	Standard User	×	
Triage 4	triage4@royalhopemc.com	235	Standard User	×	

Use the green tick icon to save any changes

Configuration Console - Extensions

Use the Menu or via the Single Sign On
(sso.x-onweb.com)

Select an application

CC Configuration Console https://config.x-onweb.com	R Reports https://reports.x-onweb.com	SD Service Delivery Console https://build.x-onweb.com
SP Soft Phone https://phone.x-onweb.com	SP Support Portal https://support.x-onweb.com	UC User Console https://console.x-onweb.com
V Voicemail https://voicemail.x-onweb.com	W Wallboard https://wallboard.x-onweb.com	X X-flow https://xflow.x-onweb.com

The screenshot shows the Configuration Console user interface. At the top right, there is a hamburger menu icon and a user profile icon labeled 'JH'. A dropdown menu is open, listing the following applications:

- CC** Configuration Console
- SDC** Service Delivery Console
- SP** Soft Phone
- SP** Support Portal
- UC** User Console
- V** Voicemail
- W** Wallboard
- X** X-flow
- H** Help Centre
- Logout**

Configuration Console - Extensions

The screenshot displays the SURGERY CONNECT Configuration Console interface. The top navigation bar includes the SURGERY CONNECT logo, a help icon (?), a menu icon (≡), and a user profile icon (JH). The main content area is divided into two sections: a sidebar on the left and a dashboard on the right.

The sidebar, titled "X-on Training Account", contains the following menu items:

- Services
- Users
- Extensions
- Groups
- Calendars
- Directory
- Integrations
- X-Flow
- Global settings

The dashboard, titled "Dashboard", displays three key metrics:

- Users: 48
- Groups: 16
- Calend...: 3

A callout box with the text "Select Extensions from the menu" points to the "Extensions" menu item in the sidebar.

Configuration Console - Extensions

SURGERY CONNECT ? ☰ JH

X-on Training Account

- Services
- Users
- Extensions**
- Groups
- Calendars
- Directory
- Integrations
- X-Flow
- Global settings

Extensions list

Name search

Consultation Room 1

- 265527189
- FA:KE:-S:IP:-3:96:99:75
- T21P
- Not assigned

Consultation Room 2

- 265528045
- FA:KE:-S:IP:-3:98:57:55
- T21P
- Not assigned

Reception Extension 1

- 265521561
- FA:KE:-S:IP:-3:94:08:55
- T27G
- Not assigned

Reception Extension 2

- 265523383
- FA:KE:-S:IP:-4:03:49:85
- T27G
- Not assigned

Staff Room

- 265523243
- FA:KE:-S:IP:-4:03:49:05
- T21P
- Not assigned

Standard Extension 3

Training T21P

- 265522530
- 80:5E:CO:BB:00:00

Upstairs Conference 1

- 265523610
- FA:KE:-S:IP:-4:03:48:95

Video Phone 1

- 265520321
- FA:KE:-S:IP:-4:02:40:35

Search or scroll through the Extensions

Use the pen icon to view or edit the default settings

Configuration Console - Extensions

The screenshot displays the SURGERY CONNECT Configuration Console interface. On the left is a navigation sidebar with the following items: X-on Training Account, Services, Users, Extensions (highlighted), Groups, Calendars, Directory, Integrations, X-Flow, and Global settings. The main content area is titled 'Editing extension: Staff Room' and features several tabs: General (selected), Buttons, Ringtones, Group Priority, and Manage Members. Below the tabs are 'Back' and 'Save' buttons. A callout box points to the 'Buttons' tab with the text 'Select the Buttons tab'. Under the 'General settings' section, the 'Extension info' is displayed in a table:

Name	Staff Room
SIPUA	265523243
MAC Address	FA:KE:-S:IP:-4:03:49:05
Extension type	T21P

Below this, the 'Optional Settings' section includes:

- Missed Call Notification Light: No
- Display Missed Call Popup: No

A blue banner at the bottom contains the message: 'Changing the settings below will not take effect until the device is rebooted.'

Configuration Console - Extensions

SURGERY CONNECT ? ≡ JH

X-on Training Account

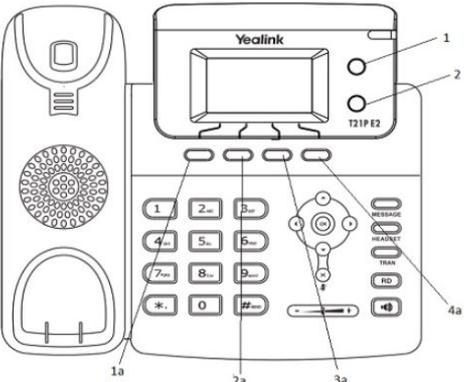
- Services
- Users
- Extensions**
- Groups
- Calendars
- Directory
- Integrations
- X-Flow
- Global settings

Editing extension: Staff Room

General **Buttons** Ringtones Group Priority Manage Members

« Back

Button customisation

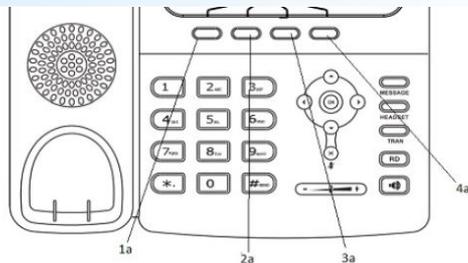


Line keys

1 [Not Set]

Scroll down to see the Line and Soft key function allocations

Configuration Console - Extensions



Line keys

1 [Not Set]
2 Login

Change Login to Not Set to remove the option on the extension

Soft keys

1a DND
2a Group Pickup
3a History
4a Status

Save any changes

<< Back Save

Summary & Questions

- Accessing the Service Delivery Console
- Accessing Extensions
- Assigning Users
- Assigning a Generic User
- Configuration Console - Extensions

Questions?