

Training Overview

Softphone Training

Duration **30 minutes**

If you could kindly remain muted during the session to reduce background noise.

I'll open the floor to questions at the end of each section, or you can use the chat panel to type questions as we go.

Slides and additional info will be shared after the session.

Session Agenda

- Working in practice
- Working remotely
- Calling internally
- Calling externally
- Calling patients
- Help & Support



SURGERY CONNECT

Cloud telephony - differences & benefits

Line Capacity

- No engaged tone and no limit to queueing for patients
- No capacity limit on outbound calls

Visibility

- Real-time view of which staff are active and their current status
- Real-time view of call traffic and efficiency statistics

Call Recordings

- All inbound and outbound calls recorded regardless of device used

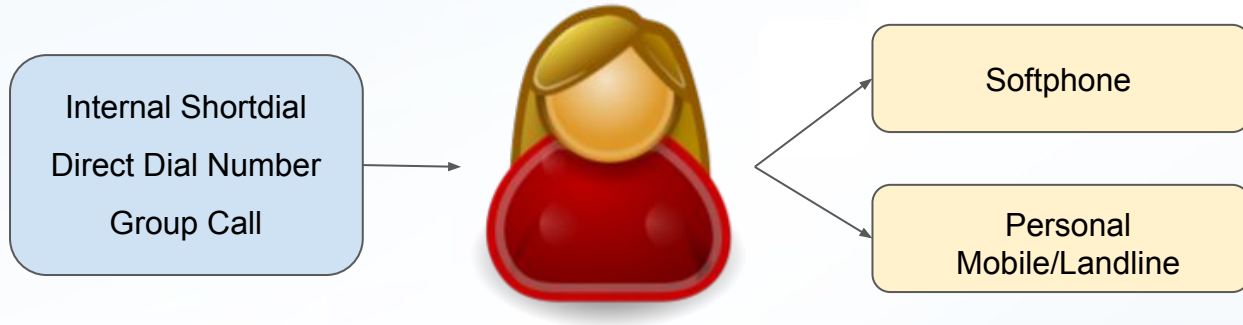
Video Calling

- Switch from audio to video call in call

Remote Working

- Staff can easily work remotely
- Staff can be located anywhere in practice

Users Not Phones



- It doesn't matter where people are located when you want to contact them
- It doesn't matter which device people are active on when you want to contact them

Logging in

sso.x-onweb.com

- Open new web page and navigate to **sso.x-onweb.com**

SSO: Log in

@ Email address

🔒 Password

Login

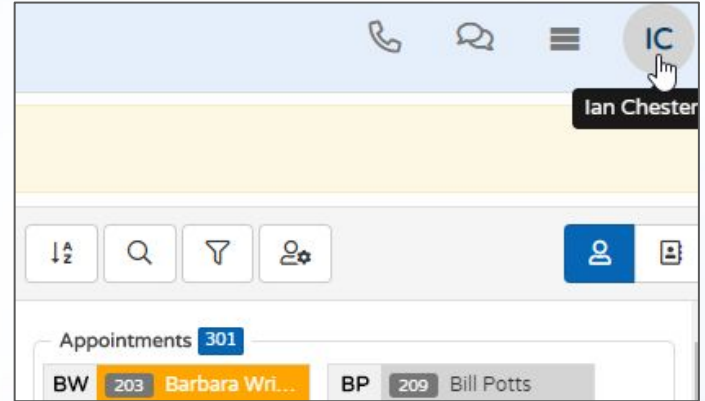
[Forgot your password?](#)

- Select User Console from available options

UC User Console
<https://console.x-onweb.com>

Device Management

- Accessed by clicking your initials in the top right of the User Console



- Choose the device on which to take calls when working remotely
- Set your availability

Ian Chesterton 219

Numbers	User status
Mobile: 07780 667707	▶ Available
▶ Home: 01728 747049	Do Not Disturb
Temp: Soft phone	Logged Out
	Outbound Calls

User Console

Call List

Started	Caller	Dialled	Queue	Answered by	Duration
09:10	07542 596569	Main Number			Answered: 47s
09:09	07807 641743	Main Number			Menu: 5s
09:07	Dr N Browne	07772 535646			Call Out: 3m 3s
09:07	07445 952762	Main Number	Reception		Queuing: 2m 8s
09:01	07909 596710	Main Number	Reception		Queuing: 7m 54s
09:00	07754 883299	Main Number	Reception (Hayley Fearnley)	Hayley Fearnley	Call In: 4m 8s
09:02	Michael Poplawski	07711 830331			Call Out: 8m 24s
09:02	07843 926057	Main Number	Reception		Queuing: 7m 4s
09:09	Victoria McGrath	Kathryn Thomas		Kathryn Thomas	
09:09	Victoria McGrath	Kathryn Thomas		Kathryn Thomas	
09:07	Unknown	Main Number			
08:58	07925 012472	Main Number	Reception (3m 22s)	Hayley Fearnley	
08:57	Dr N Browne	07807 641743			
09:02	07946 748583	Main Number	Reception (11s)		
08:48	07712 537981	Main Number	Reception (8m 8s)	Hayley Fearnley	

< 1 2 3 4 >

1 - 15 of 53

User List

Emergency Bypass 333

HB 223 Hayley Bay...	JC 229 Jo Cliff
KT 216 Kathryn Tho...	VM 224 Victoria Mc...
WS 221 Wendy Sou...	

Healthcare Professionals 300

HB 223 Hayley Bay...	HF 250 Hayley Fear...
JC 229 Jo Cliff	

Reception 301

HB 223 Hayley Bay...	HF 250 Hayley Fear...
JC 229 Jo Cliff	

No group

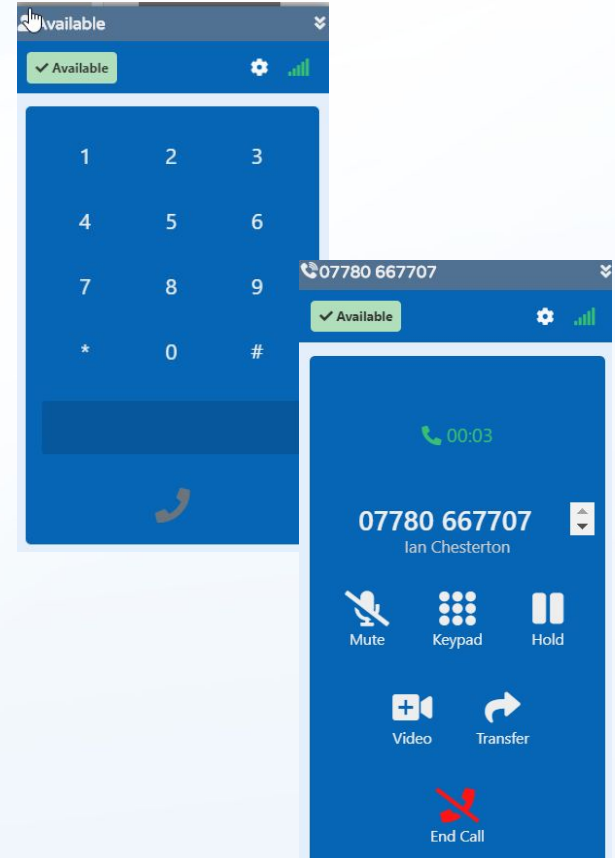
AA 220 Alison Aldred	DJ 201 Debbie John...
DE 205 Dr Eleanor ...	DF 206 Dr F Awan
DN 213 Dr N Browne	DN 207 Dr N Green
DZ 204 Dr Z William	GT 208 GP Trainee
JY 227 Jaime Yates	JH 219 Jane Haslam
JB 228 Joanne Brown	KC 222 Katherine C...
KF 214 Kerry Fearick	MP 310 Michael Pop...
MC 220 Mohammad	NF Nicholas Fernandez

Available Users 8	Queued Now 3	Current Longest Q 7m 53s	Inbound Today 28	Q over 10 min 0	Avg Q Last Hour 4m 46s	Q Busters Now 0	Longest Q Buster 0
-----------------------------	------------------------	------------------------------------	----------------------------	---------------------------	----------------------------------	---------------------------	------------------------------

Available ⌵

Softphone Overview


- Just another way to make outbound and take inbound calls
- Every user has a softphone on their User Console
- Runs in the browser - headset preferred but optional
- Option to convert audio call to video call
- Webcam required
- Patient must have adequate data bandwidth (3G minimum)



Quick reference guide to Softphone

SURGERY CONNECT

Using the Softphone



Incoming Calls

Click **Reject** or **Answer** to decline or accept the call

Caller on **Hold** hears music. Press **Resume** to continue talking

Mute off **Mute on** - agent is muted but caller can still be heard

Transfer a Call

Click **Transfer** and enter **Short Dial**, then click **Transfer**

If the extension picks up click **Transfer** to transfer call

If the extension doesn't answer then **Reject** to return to caller

Internal Calls

Enter **Short Dial** and click **Transfer**

Redial Number

From the Call List, click on dropdown arrow (next to caller number) and select **Call**

Started	Caller
26/08/2020 12:51:52	020 7524 2424
26/08/2020 12:06:54	Call
26/08/2020 12:06:58	Add to Central Directory Copy number to clipboard

Switch from Audio to Video Call

During audio call click **Video** then click **Send** to send an SMS link to the caller's smartphone

Caller clicks **GP Surgery SMS link** to accept and start the video call

Click **Answer** to go to Video

Would you like to invite this caller to a video call? We will send them an invitation via text message.

Cancel Send

Changing User Status or Device

Click **User Initials** in menu bar

Select **Do Not Disturb** or **Logged Out** to change user status

Choose **Work**, **Mobile** or **Temp** to change required device

Ian Cheston 07407 006006

Numbers

- Mobile: 07780 123456
- Home: 01729 123456
- Temp: Softphone

User status

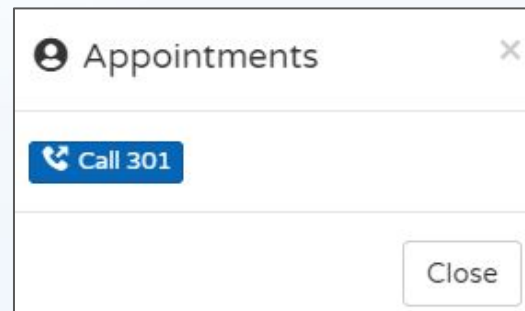
- Available
- Do Not Disturb
- Logged Out
- Outbound Calls

Internal Calling

- Internal calling is the same whether you are in practice, on your mobile or using the softphone
- The User Console gives a real-time view of who's available
- Click to call a user directly or a group from the console
- No need to remember people's short dial or keep a list

Appointments **301**

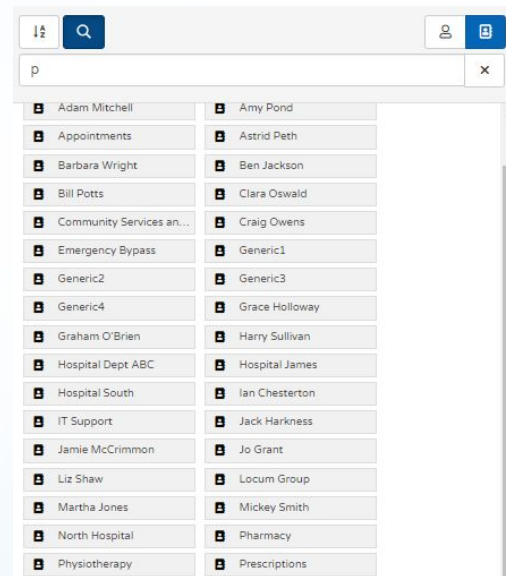
AP	210	Astrid Peth	BW	203	Barbara Wri...
BP	209	Bill Potts	LS	202	Liz Shaw
TJ	236	Tegan Jovan...	YK	212	Yasmin Khan
ZH	225	Zoe Heriot			



External Calling (Hospitals, Suppliers etc)

Central Directory

- Digital phone book for practice
- Add useful numbers
- Click to call on any device



Receiving Patient Calls

When a patient call targets your Receptionists -

- A popup will appear with potential matching patients.
- It will tell you how long they have queued for
- It will tell you who they last spoke to
- To open the patient record, simply click the name in the popup

SURGERY CONNECT


INBOUND call from 07780 667707

Last called ↓ **9 days ago** Queuing for ⌚ 4s

Last talked to 👤 Dr Steven [2m 16s]

👤 **Mr George Bluth** (23/06/1954)

👤 **Mrs Lucille Bluth** (07/03/1990)

☎ 07780 667707  Close

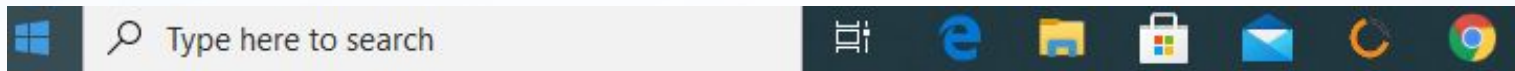
Calling Patients

When viewing a patient through clinical integration you can -

- Use the keyboard to make a call
- Use the Patient Overview to make the call



- Call the active patient's Home Number.
- Call the active patient's Mobile Number.



Mrs Lucille Bluth (07/03/1990)

Contact | SMS Log | Call Log | Triage

Home phone: 0117 496 6666 Call Copy

Mobile phone: 07780 667707 Call Copy SMS

SMS Template: Choose a template Refresh

NHS Conditions: Choose a condition Add

- Associate call to patient's record

SURGERY CONNECT

Associate call recording with
Mr George Bluth?

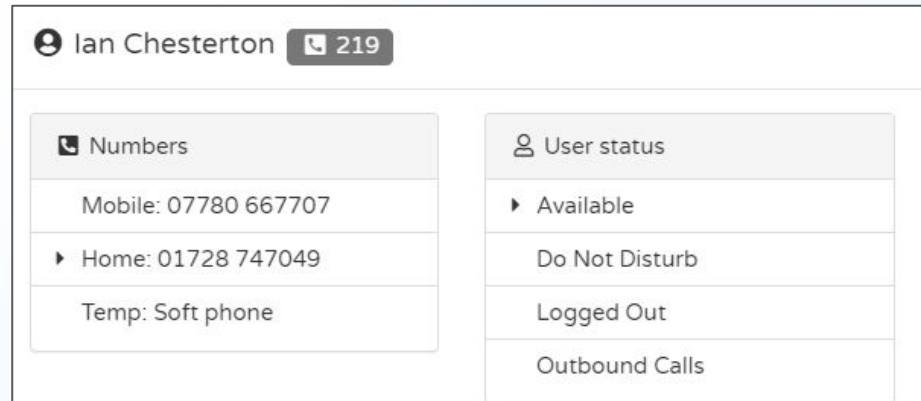
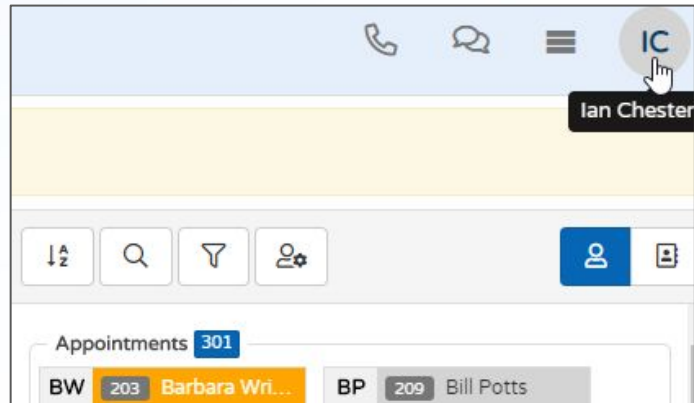
07876 450214 Copy

Yes No

Version 1.5.1 © X-on 2018

Log out

- Softphone



Help & Support

Pre Go Live

- Call Service Delivery 0333 332 0155
- Email servicedelivery@x-on.co.uk

After Go Live

- Call Support **0333 332 6633**
- Support Portal

Training

- Call 0333 332 6777
- Email training@x-on.co.uk