

### Introduction

This document provides an overview of feature changes and additions made to Xchange with version 3.0.

Xchange version 3.0 continues a path of evolution and innovation of the original vision of Xchange Software. Version 3.0 is a major update with a significantly updated graphical user interface designed to reflect feedback from our user community and the latest design trends.

Initially version 3.0 will only be made available as the Desktop PC client with the Xchange Operator and Mac client following later.

### Comparison between versions 2.6 and 3.0

#### Presence

A square user icon has replaced the solid circle used in 2.6. The square is given a unique colour and initials for each user. Telephone extension status (busy lamp field) is shown as a vertical bar to the left of the square.

•	SAMSUNG - • ×									
	201 Ian D	eacon								
₿	(Absence t	ext)								
۵ 🔶	🔓 +32 (12) 3	12 312		Connected	4m 31s					
(Ente	r search text	or number to dial)				•				
	Telephone	Name	Department	State	Direction	A				
4		Administration								
+	203	Patrick Mace	Administra	On hook						
0	204	Libby McIntyre	Administrat	On hook						
4		Sales								
-20	201	lan Deacon	Sales	Off hook	In					
8	201	lan Deacon	Sales	Off hook	In	A				
1. <del>)</del>	301	Ian Deacon SIP	Sales	On hook		A				
1.0	2001	lan Deacon Mobile	Sales	On hook		A				
1	202	Wendy Rowell	Sales	Held	In					
1	202	Wendy Rowell	Sales	Held	In	A				
1. <del>0</del>	302	Wendy Rowell SIP	Sales	On hook		A				
4		Support								
Θ	321	Support Technici	Support	On hook						
Θ	325	Support Technici	Support	On hook						
÷	320	Support Technici	Support	Ringing	In					
Θ	323	Support Technici	Support	On hook						
Θ	324	Support Technici	Support	On hook						
Θ	322	Support Technici	Support	On hook						
202	Wendy Roy	well Sales								
-	Miguel Urib	e, Cafe de Colombia	Ltd.							

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	~
	=
w in London	
/2017	



Additional information previously shown in columns is now available in the bottom panel and Contact details window.

Wendy Rowell	✓ Available (() (() () ()	🔎 User: W	/endy Rowell -	-	×
202     202     202     Wendy Rowell	Show Detail	WR	202 Wendy Rowell   Sales ♥ Miguel Uribe, Cafe de Colombia Itd. ▷		~
		DDI: Mobile: Home: Email:	999888777 777666555 888777666 wendy@abc.com		

Set DND, Forward and Availability states directly from Presence window.

•		SAN	ISUNG		- •	×	2 Pre	esence				_		×
	201 Ian D	eacon							lan Deacon   S	ales				
C)	Board mee	ting at 15:00					1		201 Board meeting a	at 15:00				✓.
<b>&gt;</b>	🚨 +32 (12) 3	12 312		Connected	7m 0s		(Enter	search	text or number t	V 🖻	🗗 रि	0	Ĺ	
(Ente	er search text	or number to dial)				•	Ada	inict	ration					_
	Telephone	Name	Department	State	Direction	Α	a Adn	Datri	ration ck Mace	Text:	Board meet	ing at 1	5:00	
⊿		Administration					PM	203	en mace	Until:	Today	• 1	2.00	•
-🔲	203	Patrick Mace	Administra	On hook			.0	203	Patrick Mace	<b>O</b>	loudy		2.00	
.0	203	Patrick Mace	Administra	On hook		A	1.O	303	Patrick Mace S					
.0	303	Patrick Mace SIP	Administra	On hook		A	0	Libb	y McIntyre	Forward:	(None)		: 0	
0	204	Libby McIntyre	Administrat	On hook				204					_	

Hovering over a user or extension in the Presence window will cause a slider bar to appear on the right hand side of the window that will present any options available to the user.

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	201 Ian D	eacon						2 1	esence			
₽>	Roadshow	in London							lan Deacon   Sal	es		$\checkmark$
۵	🔓 +32 (12) 3	12 312		(	Connected	8m 45s			Roadshow in Long	don		•
(Ente	r search text	or number to dial)						(Enter				≡-
	Telephone	Name	Dep	artment	State	Direction	A	⊿ Adr	ninistration			^
4		Administration						PM	Patrick Mace	🗸 Available 💽	00	
-	203	Patrick Mace		Consul	t			-	203			
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.0	303	Patrick Mace SIP	1	Call His	tory		A	.0	303 Patrick Mace SIP			
0	204	Libby McIntyre	P	Send M	lessage			0	Libby McIntyre			
4		Sales		Send Er	mail				204			
-20	201	Ian Deacon	Sales	;	Off hook	In		⊿ Sale	es			
8	201	lan Deacon	Sales		Off hook	In .	A	34	lan Deacon	✓ Roadshow in L	ondon	
	301	lan Deacon SIP	Sales		On hook		A	A A	201	Until 12:00		_

#### Messaging

Improved Messaging interface that also includes individual or group messaging. Group messaging allows a permanent chat room to be set up with pre-defined users.

Important note: Version 3 will no longer support messaging between extensions. Messaging is now a user only level feature.

# ХСНЛNGE

🌯 Chat: IAN	?	_	×	� Chat ─ □	×
09/05/2017 Me Hi Patrick				Ian Deacon	00
				Today	
				Hi Patrick	
				12:20	
To: IAN			<u>گ</u>		
1			aA		₽

#### **Preview Window**

Improved larger window layout will resize according to the amount of content to display.



No longer opens a new preview window when multiple parties are involved in the same call (consult, on hold); instead, the windows are now stacked with the active call always at the front. The hidden call is simply selected by clicking its header box (behind the active call).

Call: Connected X	
Wendy Rowell	
02	📞 Outgoing call: Heldxfer
Complete 📓 Cancel	📞 Internal call: Connected
all: Heldxfer X	Wendy Rowell
larcus Busher, Japan Tech 11234) 567 89	Sales 202   Internal call
Make call 📓 😼	<b>(</b> ) <b>(</b> )

Notes from Microsoft Outlook and Xchange shared address book contacts are now visible within this window.

#### Xchange Version 3.0

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Call: Ringing X	Incoming call: Ringing	<
Phil Collins, Acme Ltd. (0800) 500 005 Support contract expired, pelase transfer all the calls to the commercial department.	PCA Phil Collins, Acme Ltd.	
🛼 Answer 🔹 🌲	Support contract expired, pelase transfer all the calls to the commercial department.	
	٤	
	2 🚯 1m 31s	

#### **Call History**

The Call history window has been updated to a two-line view per call with a unique coloured and initialled icon per contact. Available actions are presented as a pop out bar from the right-hand side of the screen.

	Call History		?	-		🙄 Call His	story	>	<
	Date/Time	Telephone	Name	Duration	Direct ^	⊿ Today			^
4	10day 15:11:57	0123456789	Mr. Marcus Busher / Marcus Busher, Japan	27s	Out	🤕 🍯	Marcus Busher, Japan Tech / Mr. Marcus Busher	) 📭 🚳 🔔	)
-	15:11:30	123456789	(Speaking clock)	17s	In	· p	0123456789	Microroft O	utlo
4	10:47:33	202	Wendy Rowell	40s	Out	1 V 1	123456789	175	uno
-	10:43:18	202	Wendy Rowell	4m 48s	In		Wendy Rowell	10:47:33	
-	10:27:49	201	lan Deacon	2m 13s	In	😍 WR	202	40s	
\$	10:27:49	005751236547	Miguel Uribe, Cafe de Colombia Itd.	48s (2m)	Out	👽 WR	Wendy Rowell 202	10:43:18 4m 48s	
⊿	09/05/2017 12:34:21	0800500005	Phil Collins, Acme Ltd.	2m 56s	In	۲ پ	lan Deacon 201	10:27:49 2m 13s	
4	12:32:04	0800500005	Phil Collins, Acme Ltd.	20s	Out		Miquel Uribe. Cafe de Colombia Itd.	10.27.49	
	12:31:01	0800500005	Phil Collins, Acme Ltd.	48s	In	😪 MUC	005751236547	48s	
4	12:29:04			1m 11s	Out				
4	12:27:03	0123456789	Mr. Marcus Busher / Marcus Busher, Japan	3m 44s	Out	⊿ 09/05/3	2017		
	12:23:24	005751236547	Miguel Uribe, Cafe de Colombia Itd.	1m 7s	In	++ PCA	Phil Collins, Acme Ltd.	12:34:21	
-	12:22:38	123456789	(Speaking clock)	20s	In		0800500005	2m 56s	
4	12:03:47			18m 23s	Out	👽 PCA	Phil Collins, Acme Ltd.	12:32:04	
4	12:02:59			6s	Out		0800500005	203	
	12:02:45	3456778	(Unknown)	20s	In	😍 PCA	Phil Collins, Acme Ltd. 0800500005	12:31:01 48s	
4	11:57:04			30s	Out		0800300003	12:20:04	
4	11:49:39	07811223344	(Mobile services)	7m 55s	Out	17 C		1m 11s	
٠	11:44:41	1234567890	(Speaking clock)	4m 35s	In		Marcus Busher, Japan Tech / Mr. Marcus Busher / Marcus Busher, Japan	12:27:03	
٠	11:01:26	00581236547	(Venezuela)	42m 1s	In	5 🏓	0123456789	3m 44s	
-	10:28:06	00361234567	(Budapest, Hungary)	27m 59s	ln 🗸	👽 мис	Miguel Uribe, Cafe de Colombia Itd.	12:23:24	Ξ.
201	an Deacon	~	Filter: (None	) ( Page	1 +	201 Jan Dea	con y Filter (None) 4	Page 1	Ŀ

#### **Address Book**

The contact icon has been changed to mirror that used in Call history.

Add	ress Book		? — [	) X	Address Book			- 0	×
Searc	h: Marcus (Name, Company name, Telephone	number)	New	GO contact	Search:	Marcus (Name, Company name, Telephone	number)	Go New cont	act
Advan	ced search			$\overline{\mathbf{v}}$	Advanced sear	ch			~
Na	ime	Telephone	Email	Town	Name		Telephone	Email	Town
⊿ Mie Bus	<b>crosoft Outlook</b> sher, Marcus	B: 0123456789 H: 02111222333	user@outlook.con	n Tokyo	▲ Microsoft Out	utlook			
⊿ Sha	ared Address Book	M: 07811223344			ø Busher, I	Marcus	B: 0123456789 H: 02111222333	user@outlook	Tokyo
Ma	rcus White, Fast track delivery ltd.	0201234567			▲ Shared Addr	ess Book	M: 07811223344		
					MWF Marcus	White, Fast track delivery Itd.	0201234567		
201 Ian D	leacon V		∢ Page	1	201 Ian Deacon	~			

# **XCH/NGE**

#### Tray menu

The tray menu has changed significantly in layout, although the actual functions available are very similar to version 2.6.



#### Search

Search results now show in the system tray menu rather than opening a separate search window. Extension BLF status is also show (see New Features section below)

Marcus		Search Results
Recent	•	⊿ Microsoft Outlook
Features	•	<b>Provide State Sta</b>
Availability	•	Marcus Busher, Japan Te B: 0123456789
Show Presence		Google Contacts
Messaging		Marcus Busher 0: +81 123-45-6789
Address Book		(III) A Shared Address Book
Call History		Marcus Taylor, Acme Ito
Configuration		+81 123456789
Help		
Exit Samsung Xchange		

# ХСНЛИБЕ

#### **Recent calls**

		(Enter search text or number to dial)
0081123456789 Marcus Taylor, Acme ltd.	$\odot$	Recent
320 Support Technician 1		Features
360123654789 (Unknown)	100-	Availability
02123456987 (National rate)	~	Availability
02111111 (National rate)		Show Presence
02123654789 (National rate)	P	Messaging
003212312312 (Tongeren, Belgium)	2	Address Book
203 Patrick Mace	1	Call History
316 (Unknown)		Configuration
00551236547	3	Help
	-	Exit Samsung Xchange

• •



### Availability



### Help

Help is now indexed and searchable from within the system tray menu.



#### **Presentation of Standard and Partner Integrations**

The Integrations dropdown list menu has changed significantly in layout, clearly identifying Standard and Partner integrations.



(Please select)	~	(Please select)	~
(Please select)	~	(Please select)	Standard 🔺
Act! 2007-2009		Act! 2007-2009	Standard
Act! 2010+		Actl 2010+	Standard
Autotask		Act 2010+	Standard
ConnectWise		Autotask	Partner
DATEV		ConnectWise	Standard
Dezrez		💪 DATEV	Partner
EGroupware		🔂 Dezrez	Partner
GoldMine		EGroupware	Standard
Google Contacts		Gold Mine	Standard
Google Places		Conclumne	Chandard
Infor CRM / Saleslogix		Google Contacts	Standard
LDAP		Infor CRM / Saleslogix	Standard
Lotus Notes		A LDAP	Standard
Maximizer		😡 Lotus Notes	Standard
Misrosoft Assess		👰 Max-Immo	Partner
Microsoft Dynamics CRM		Maximizer	Standard
Microsoft Dynamics NAV		Maximizer CPM Web Access	Standard
Microsoft Outlook		A Maximizer Criw web Access	Standard
National Directories		Milcrosoft Access	Standard
NetSuite		Microsoft Dynamics CRM	Standard
ODBC		Microsoft Dynamics NAV	Standard
PCHomes		Microsoft Outlook	Standard
Rezi		Antional Directories	Standard
RPM		NetSuite	Standard
Sage 50 Accounts			Standard
Sage 50 Complete Accounting (US Edition)			Standard
Sage CRM		TCHomes PCHomes	Partner
Salesforce CRM	×	PerfectView	Partner
		😴 Rezi	Partner
		🔆 RPM	Partner
		🛃 Sage 50 Accounts	Standard
		籋 Sage 50 Complete Accounting (US Edition)	Standard 🗸

To integrate with "Other" integrations, a key will be required to expose the add-in.

(Add new)		
Select the type of	application to integrate to	
Туре:	(Other application)	Set
Enter code:	[U	nlock

## **New features**

#### **Contact Photo**

Xchange now allows users to display their photos within Xchange Presence, Preview, Call history, Address book and Messaging windows. If a photo is not available the Initials of the name stores will be shown. Photo's can also be displayed for external contacts held in Microsoft Outlook and Google Contacts.

Address Boo	vk		-
Search:	huff		Go
	(Name, Company name, Tele	phone number)	New contact
Advanced sea	arch		
Name		Telephone	Email
Salesforce	CRM		
Mr. Ch	nris Huffman, NASA	00447766992184 M: 07766992184	
Microsoft (     Chris H	Dutlook Huffman, Mondago	B: 01733405847	chris@a.b.com
Chris H	Huffmann, ACME	H: +44 1488685102 B: 01234567890	
		M: +447766992184	
Google Cor     Chris H	ntacts Huffman	w: 011441733394449	
		m: 00447766992184 h: +441488685102	
Microsoft [	Dynamics CRM		
CC Chris H	Huffman, CHTech	M: 07766992184	
Contacts			

Xchange Version 3.0



A user can easily add a picture of themselves by right clicking on the presence square at the top of the Presence window and using the Photo selector feature to add a photo or image.



#### System Tray BLF Status

The call status for a user/extension is also available in the search within the system tray search results, avoiding the need to go to the Presence window to check their status.



#### **Show Details**

Show details is used to display any information associated with the user that is not shown in other parts of the Presence screen (and which may previously have been shown in the Presence columns).

# ХСНЛNGE

Ian Deacon   Sales         201         Roadshow in London         (Enter search text or number to dial)         Administration         PM       Patrick Mace         203         203         203         203         Patrick Mace         Show Detail         PM         203         Patrick Mace         Show Detail	A Presence	- 0	×		
(Enter search text or number to dial)	Ian Deacon   Sales 201 Roadshow in London		<b>~</b> .		
Administration  PM Patrick Mace 203 Patrick Mace Constrained Cons	(Enter search text or number to dial)		≡-		
PM       Patrick Mace       Available       Image: Constraint of the second s	Administration		^		
Image: Show Detail     P User Patrick Mace     -	PM Patrick Mace	🗸 Available 💽 💽 📿	2		
303 Patrick Mace SIP     203 Patrick Mace   Administration     PM     203 Patrick Mace   Administration     Compared to the second	203 Patrick Mace		Show Detail	Vser: Patrick Mace	-
□ Libby McIntyre 🔋	303 Patrick Mace SIP			203 Patrick Mace	Administration
204 DDI: 11112222	Libby McIntyre 204			DDI: 11112222	
▲ Sales Mobile: 7777666 Home: 4444333 Email: <u>patrick@acme.com</u>	⊿ Sales			Mobile:         77776666           Home:         44443333           Email:         patrick@acme.com	I.
Ian Deacon  Roadshow in London Until 12:00	Ian Deacon 201	<ul> <li>Roadshow in London Until 12:00</li> </ul>			

#### **Presence settings features**

Set features (Forward or DND), can now be pre-configured within then Presence window, also you can change your availability status by selecting this from the icons at the top of the Presence window. Absence text can also be changed from here.

Important Note: Absence Text applies only to user and not an extension. This can be viewed on the User view and Combined view options within Presence).



#### Available until

Manually set or automatically set (the automatic option is only available with server side Exchange calendar integration only).

#### **Chat messaging**

Group messaging (see earlier in this document)

#### Access to Add-in Guides

Standard and Partner add-in guides can now be accessed simply by clicking the help button in the relevant configuration area.

🔅 Samsung Xchange - Cont	figuration			-		×
$\equiv$ general	^ Microsoft	Outlook				0
Telephony Mobility	Select the ty	pe of application to integrate to				^
Interface	Туре:	Microsoft Outlook	~	Disa	ble	
Dialling	Name:	Microsoft Outlook				

# **XCH/NGE**

## New features available on extended pre-release until 1<sup>st</sup> April 2018

#### Softphone

Xchange 3.0 include the option for an embedded softphone in the PC client (available as beta in first release). Please note, Softphone is not supported in Citrix / Terminal services environments.

#### **Virtual Devices**

Virtual Devices allow you to effectively configure an extension on the Xchange server that monitors calls from an external PSTN number. When a call is received from the number it will be visible to all Xchange users allowing the user to know when an external caller is speaking to a colleague. Virtual Devices require a license.

2 Presence		-		×
Rob 2247 2247 Rob Cox			•	✓.
(Enter search text or number to dial)				:≡ •
Account Management				
Customer Services				
Development				
Product Management				
Release Management				
⊳ Support				
VIP Customer				
RB Richard Branson V 07766992184	' Available			
Department: None				

### **Features removed**

#### Selectable skins

The selectable skins option has been removed from the Interface settings (Main Window)

Interface		•
License type:	Start automatically with Windows	~
Language:	(Auto detect)	~
Main <u>w</u> indow:	(Default skin)	~

#### Messaging between extension

Messaging is now only available between users and not extensions

## Don't forget

#### **Browser server management**

Server management and configuration can be done via a browser removing the need to login from server itself or using a remote session to it.

## Things to consider before upgrading to V3

#### Messaging

The first release of V3 will include a V3 version of the the PC client and the Server. The Attendant Console, Mac and Android clients will remain unchanged until Q1/Q2 2018. This means that the new group messaging features available in V3 will not be available with these clients until a newer version is made available.