

# SmartPABX™

Administration Guide





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# SmartPABX™ Web Interface

## Admin Web Interface

The **admin** web interface allows full control to configure every feature of the SmartPABX. The **admin** user is able to access and modify every section of the SmartPABX, including listening to stored call recordings. The **admin** username and password should generally only be issued to a single manager who is responsible for the management of your SmartPABX.

## User Web Interface

The **user** interface gives access to only some features of the SmartPABX related to the extension that is logged in at the time. Each extension on your SmartPABX is able to login to the **user** web interface, simply by using their 4 digit extension number as the username, and their SIP password as the password.

## Click-to-Dial Phone Directories

While logged into the **user** web interface, users may take advantage of the “click-to-dial” functionality built into this interface. There are two different contact directories where users can store contact details. The phone numbers for each of these contact records then turn into a click on link. Clicking on the link automatically triggers a call to the number you click on. There are two different contact directories available to the user: **Personal** and **Shared**. The personal directory is accessible only by that extension. The shared directory is accessible by all extensions on the SmartPABX.

## Web Interface Overview

Your SmartPABX™ system gives you full control of its configuration via an easy to use Web Interface. The Web Interface supports two different levels of permissions: **admin** and **user**



# Feature Codes

## List of Feature Codes

Your SmartPABX is pre-programmed with a number of “feature codes”. These feature codes can be dialled from your handset.

Each “feature code”, as well as a description is listed below:

Feature Code	Description
*1	Login to voicemail. When prompted, enter mailbox number followed by # key. When prompted, enter mailbox password/pin, followed by # key.
*10XXXX	Remote call pickup. Allows user to answer a call ringing on another extension. To use this feature, dial *10XXXX, where is XXXX is the extension number of the phone that is ringing
*6601	Listen to Music on Hold
500	Access the Corporate Directory
25	Make a recording for your PABX
*65xxxxxxxx	Set a call forward from the handset by dialing *65 and the number to forward to. A voice prompt will confirm it is active. Feature will take upto 1 min to apply. The call forward is active from the PABX itself and is the recommended way to forward a handset. Call forwarding using the call forward feature in the handset itself will conflict with any queues the phone might be in.
*64	Disable call forward from the handset. Feature will take up to 1 min to apply.



# Configure Extensions

## Extension Overview

Extensions should be allocated for each telephone handset that will be connected to the SmartPABX. For example, if you have 10 telephone handsets, you will need to create 10 different extensions within the SmartPABX for your 10 phones.

Extension numbers are 4 digit numbers and are allocated to each extension automatically when they are created. The first extension that you create will be automatically allocated with extension number 9001, and additional extensions will be allocated with 9002, 9003, 9004 and so on.

Once you have created your extensions in the SmartPABX, and have configured and connected your telephone handsets to the SmartPABX, users of those telephone handsets will be able to call other users by dialling their 4 digit extension number.

## Creating a new Extension

To create a new extension, login to your SmartPABX web interface and complete the following steps:

- Click on the “Configure Extensions” menu option
- At the bottom of that page, click on the “Click here to add a new extension” button
- You will be presented with a page similar to the image displayed in figure 1.1

Editing Extension Number 9003	
Extension Number:	9003
Extension Password:	3rraF3asqd <small>(Meets Requirements)</small>
Extension Comment:	Extension 9003
Web User Password:	Password12
Concurrent Call Limit:	2
Extension Context:	active
Send Inbound to Ring Group:	N/A
Ringtime:	60
Outbound Caller ID:	0399993179
Queue Membership:	<input type="checkbox"/> AccountsQueue <input checked="" type="checkbox"/> Afterhours <input type="checkbox"/> SalesQueue
Destination if no answer:	GotoVoicemail
Voicemail:	<input checked="" type="radio"/> Enabled <input type="radio"/> Disabled
Voicemail Password:	8273
Email Voicemails To:	staff@business.com
Auto Remove After Emailing:	Disabled
Add to Corporate Directory:	<input type="checkbox"/>
Record Calls:	Disabled
Forward Calls To:	
Call Waiting:	Disabled
International Calls:	Disabled
International PIN:	

When you have completed all fields, click on the “Add new Extension Number 9XXX” button to create the new extension. An explanation of each field follows.





## Description of Extension Options

### Extension Number

The extension number field contains the 4 digit extension number (allocated automatically) for the extension you are creating. It is not possible to change this value.

The extension number that is allocated becomes the registration username for the SIP handsets that connects to this extension.

### Extension Password

The extension password field contains the password for the extension number you are creating. This field will be populated automatically with a randomly generated password. It is possible to change this password if required.

The password that is allocated becomes the registration password for the SIP handset that connects to this extension.

**IMPORTANT NOTE:** If you change the password to a custom password it is very important to use a secure password that contains a mixture of letters and numbers and is at least 6 characters long. Care should be taken to ensure that this password is kept in a safe and secure place.

### Extension Comment

The extension comment field is used as a descriptive field to label the extension either by the users name. This field should contain the users first name and surname, separated by a space. This field is also used by the Corporate Directory feature. This field accepts all characters.

### Concurrent Call Limit

The concurrent call limit field describes the number of concurrent calls permitted for that extension, ranging from 1 through to 10.

If you require the ability for your users to place callers on hold while attending to other calls, you must set this value to at least 2. The default value for this field is 2.

### Extension Context

The extension context field is primarily used to suspend extensions. Normally this would be set to "Active". In the case where you wish to prevent an extension from being able to make or receive telephone calls, you should set this field's value to "Suspended".

Extensions that are "Suspended" are unable to make or receive calls, and their telephone handsets will also be unable to register to the SmartPABX.

### Send inbound to Ring Group

This option is used to redirect the extensions inbound calls to a ring group (which can ring on multiple telephones). If this option is enabled, inbound calls to this extension number will dial the ring group selected. The call will ring on all telephones in that ring group, until the call is answered. This feature



is sometimes referred to as single number reach.

To use this option you must first create a “Ring Group” (see “Configure Ring Groups”), and define the members of that ring group. After you have created the ring group, it will then be possible to select that ring group from the “Dial Ring Group” drop down menu box.

To disable this functionality, set the “Dial Ring Group” value to “N/A” from the drop down menu box.

**IMPORTANT NOTE:** Inbound calls to the extension that are initiated either from a Queue, IVR, or another Ring Group will not dial the specified Ring Group and will instead dial the extension directly. This behaviour is intended.

## Ringtime

The ringtime field is used to define the length of time that inbound calls to this extension will ring for, before either being diverted to voicemail (if voicemail is enabled), or the call being terminated (if voicemail is disabled).

## Outbound Caller ID

The outbound caller ID field is used to define the Caller ID number that will appear on outbound PSTN calls. This option can either be set to “Private”, if you wish your caller ID to be withheld, or can also be set to one of your Direct Indial numbers that are associated with your SmartPABX.

Please note that this field is not used for internal (extension to extension) calls, and is only relevant for external PSTN calls. Internal calls between extensions will always show the 4 digit extension number of the caller as the Caller ID.

## Queue Membership

The queue membership field is used to add an extension into a relevant queue. Queues must first be defined (see ‘Configure Queue’ section on page 27).

## Destination if no answer

The destination if no answer field is used to define where to route an inbound call if unanswered, after the ‘Ringtime’ has expired. There are three available options, as shown below.

- GotoVoicemail (default setting)
- GotoIVR
- Hangup

## Voicemail

The voicemail field is used to either enable or disable voicemail for this extension.

If voicemail is enabled, inbound calls to this extension will firstly ring for the number of seconds defined in the “Extension Ringtime” field, and will then divert to voicemail.



If this user of this extension is already on a phone call, and they do not have call waiting turned on in their telephone handsets, inbound calls to this extension will divert to voicemail immediately.

If voicemail is disabled, inbound calls to this extension will firstly ring for the number of seconds defined in the “Extension Ringtime” field, and will then terminate (i.e. hangup) the call.

If voicemail is enabled, both the “Voicemail Password” and “Email Voicemails To” field must be set.

If voicemail is disabled, both the “Voicemail Password” and “Email Voicemails To” fields are not required to be set.

## Voicemail Password

The voicemail password field is used to set the password for this extensions mailbox. The password should be between 3 and 6 characters long, and should be numeric characters only.

If voicemail is disabled this field should be left empty.

## Email Voicemails To

The “Email Voicemails To” field is used to set the email address of the user of this extension. When voicemails after left for this user, the voicemails are converted into a WAV audio file and instantly emailed to this email address defined in this field.

If voicemail is disabled, this field should be left empty.

## Add to Corporate Directory

If this option is selected, this user is added to the Corporate Directory. The Corporate Directory presents a caller with a directory of extensions from which they may select by name.

To use the Corporate Directory feature please ensure that all users have recorded their name, by logging into voicemail, navigating to “mailbox options”, and selecting the option to record your name.

The Corporate Directory can be accessed internally by dialling 500. The Corporate Directory can also be accessed by external callers, by configuring an IVR to connect the caller to the Corporate Directory (see “GotoDirectory” action of IVR).

## Record Calls

The Record Calls field is used to define whether or not calls to and from this extension are recorded.

If this option is enabled, all calls to and from this extension number will be recorded. If this option is disabled, calls to and from this extension number will not be recorded. \*

- Note that regardless of what this option is set to, if inbound calls to this extension are initiated from an IVR, then this field is ignored and the recording options for the IVR are instead used. For example, if extension 9001 has call recording disabled, but is receiving calls initiated from an IVR (using the “Dial” action within the IVR) and that IVR has recording enabled, then this users inbound calls from this IVR would be recorded.

**IMPORTANT NOTE:** Legal requirements regarding recording of telephone calls vary depending on



where the calls are being made to and from. Please research the legal requirements and ensure that you comply before enabling call recording.

## Forward Calls To

The “Forward Calls To” field is used to forward (redirect) inbound calls arriving on this extension to another single number. The number being forwarded to can either be a 4 digit extension number, or can also be a regular 10 digit PSTN number.

Please note that calls are only forwarded if the caller has dialled that extension directly (either directly from another internal extension, or directly from a DID number mapped to this extension). Calls to the extension number that have been initiated from an IVR (using the “Dial” action) or a Queue will not be forwarded.

## Call Group and Pickup Group

<b>Call Group:</b>	<input checked="" type="checkbox"/> Default	<input type="checkbox"/> Support	<a href="#">Edit Call Groups</a>
<b>Pickup Group:</b>	<input checked="" type="checkbox"/> Default	<input type="checkbox"/> Support	

An extension can be a member of a call group. This means other extensions that are in the corresponding pickup group can pickup calls from that extension. An extension can be in any combination of groups. Groups are managed via the Edit Call Groups link. It is not possible to remove the Default group, but it is possible to remove all the extensions from it.

## Modifying an Extension

To modify an existing extension, login to your SmartPABX web interface and complete the following steps:

- Click on the “Configure Extensions” menu option
- Click the “Edit” button next to the extension you wish to modify



Editing Extension Number 9001	
Extension Number:	9001
Extension Password:	zyTj4eet
Extension Comment:	John
Web User Password:	Password12
Concurrent Call Limit:	2
Extension Context:	active
Send inbound to Ring Group:	N/A
Ringtime:	30
Outbound Caller ID:	0399993141
Queue Membership:	<input type="checkbox"/> Accounts <input checked="" type="checkbox"/> Sales <input type="checkbox"/> Support
Destination if no answer:	GotoVoicemail
Voicemail:	<input checked="" type="radio"/> Enabled <input type="radio"/> Disabled
Voicemail Password:	97368
Email Voicemails To:	
Auto Remove After Emailing:	Disabled
Add to Corporate Directory:	<input checked="" type="checkbox"/>
Record Calls:	Disabled
Forward Calls To:	
International Calls:	Disabled
International PIN:	

Update Extension 9001

- Make the necessary changes, and when complete, click the “Update Extension 9XXX” button
- See “[Description of Extension Options](#)” for a description of each field
- If Queues have been configured, an option will appear to add/remove this extension as a member from those queues (via a check box)

## Deleting an Extension

To delete an existing extension, login to your SmartPABX web interface and complete the following steps:

- Click on the “Configure Extensions” menu option
- Click the “Delete” button next to the extension you wish to delete
- You will be asked if you are sure you want to delete this extension. Click “Yes”.

## Checking the status of an Extension

To check the registration status of an existing extension, login to your SmartPABX web interface and complete the following steps:

- Click on the “Configure Extensions” menu option
- Click the “Status” button next to the extension you wish to check the registration status for



Extension:	Voicemail:	Caller ID:	Extension Comment:			
9001	Enabled	Private	<i>Johhny Appleseed</i>	Status	Edit	Delete
9002	Enabled	Private	<i>Jane Doe</i>	Status	Edit	Delete
9003	Enabled	0399993179	<i>Extension 9003</i>	Status	Edit	Delete
9004	Disabled	Private	<i>Extension 9004</i>	Status	Edit	Delete
9005	Enabled	Private	<i>Extension 9005</i>	Status	Edit	Delete
9006	Disabled	Private	<i>Extension 9006</i>	Status	Edit	Delete

If an extension is registered, the Status field will display 'OK', along with the IP address of the phone or router.

Extension 9001	
<b>Status:</b>	OK (30 ms)
<b>IP Address:</b>	110.173.232.14
<b>Port:</b>	1033
<b>User Agent:</b>	Cisco/SPA504G-7.5.5
<b>Contact:</b>	sip:9001@110.173.232.14:1049

If an extension is not registered, then the Status field will show up an 'UNKNOWN'



Extension 9001	
Status:	UNKNOWN
IP Address:	(null)
Port:	0
User Agent:	
Contact:	



# Configure Direct Indials

## Direct Indial Overview

Direct Indial numbers are regular ten digit PSTN phone numbers. These numbers are the numbers that your customers use to call you from external locations. These numbers are commonly referred to as DID numbers.

Each SmartPABX is allocated with a group of Direct Indial numbers. How many you have depends on the SmartPABX package that you have purchased.

Each Direct Indial number can be configured to perform different tasks. For example if you have five Direct Indial numbers, it is possible to configure some of those numbers to be used as direct numbers for staff, some can be configured to be used for call conferencing rooms, and others can be used for IVRs, fax to email, etc.

Direct Indial numbers support multiple concurrent inbound calls regardless of whether the number is already in use. The only concurrent call limit for DID numbers is defined by the line limit associated with your SmartPABX package.

## Modifying Direct Indial Configuration

To modify your Direct Indial configuration, login to your SmartPABX web interface and complete the following steps:

- Click on the “Configure Direct Indials” menu option

DID Number:	Action:	Value:	
0399993140	RunSchedule ▾	MainNumber ▾	Save
0399993141	GotoIVR ▾	Support ▾	Save
0399993142	GotoExtension ▾	9003 ▾	Save
0399993143	GotoConference ▾	901 ▾	Save
0399993144	FaxToEmail ▾	fax@compar	Save

Figure 1.3

- Modify the DID by changing the “Action” and “Value” to the appropriate settings, and then click on the “Save” button at the end of the line





- See Description of Direct Indial Actions for a description of each Action

## Description of Direct Indial Actions

### GotoExtension

The GotoExtension action will send inbound calls to this DID number directly to the extension number defined in the “Value” drop down menu box. This action should be used to assign direct numbers to staff extensions.

### GotoIVR

The GotoIVR action will send inbound calls to this DID number into the IVR defined in the “Value” drop down menu box.

### GotoConference

The GotoConference action will send inbound calls to this DID number into the conference room number defined in the “Value” drop down menu box.

### RunSchedule

The RunSchedule action will send inbound calls to this DID number into the schedule defined in the “Value” drop down menu box. See Configuring a DID time/day schedule for more information on DID scheduling.

### FaxToEmail

The FaxToEmail action will turn this DID number into an inbound fax number. Faxes sent to this DID number will be converted to a PDF file, and emailed to the email address defined in the “Value” text input box. Only one email address can be specified in the “Value” box.



# DID Scheduler

## DID Scheduler Overview

DID time/day schedules can be used to configure your DID numbers to perform different actions depending on what time or day the call is received (time / day conditions).

For example, a DID that is configured to run a day/time schedule could be configured to send inbound calls to an IVR called “businesshours” during the hours of 09:00 and 17:00 on weekdays, but send calls to a different IVR called “closed” during all other times or days.

To create a new DID time/day schedule, login to your SmartPABX web interface and complete the following steps:

- Click on the “Configure Direct Indials” menu option
- Click the “Click here to manage DID time/day scheduler” link at the bottom of the page
- Click the “Click here to create a new DID schedule” button at the bottom of the page
- Enter a name for the schedule and then click “Create Schedule”.
- You will be presented with a page similar to the image displayed in figure 1.4

Priority:	Time Range:	Day Range:	Action:	Value:	
1	09 : 00 to 17 : 00	Mon to Fri	GotoIVR	BusinessHours	Save
2	00 : 00 to 23 : 59	Mon to Sun	GotoIVR	Afterhours	Save Delete
3	00 : 00 to 00 : 00	Mon to Mon	Select...		Save <input type="checkbox"/>

Figure 1.4

The “Time Range” field accepts values containing time ranges in 24 hour format. For example, a valid time range is formatted like:

09:00 to 17:00

The “Day Range” field accepts values containing ranges of days from Monday to Sunday. For example, a valid day range is formatted like:

Mon to Fri

To switch to a date range rather than a day range, select the Date option from the dropdown-box. You will be presented with additional dropdown boxes to choose a starting date, an ending date, and a month the schedule is to run in. You might, for example, choose to set a schedule for between the 1st to the 7th of January. A date range must be within the same month - if you wish to have a schedule



covering, say, 25th of January to the 2nd of February, you would need to create an option covering the 25th of January to the 31st of January, then a second one with the same action ranging between the 1st of February to the 2nd of February.

If you wish, you may pre-select a public holiday for a schedule. To do so, simply select the desired public holiday from the Pre-select Public Holiday field, and the date ranges will automatically be selected, with the time range being automatically set to cover the entire day. If you wish to make further modifications to the range, such as changing the date range to cover the public holiday and a day prior, you can simply change whichever fields are necessary. At present, public holidays which fall on variable dates each year (e.g. Queen's Birthday, Easter) are not options to be pre-selected.

DID schedules are ordered by priority. When a call is sent into a DID schedule, the schedule is executed from top to bottom (from the lowest priority to the highest priority). As soon as a matching time/day range is found, that priority is executed and the remainder of the schedule is not read.

## DID Schedule Examples

Please see below for examples of different schedules.

### Example 1

Priority:	Time Range:	Day Range:	Action:	Value:	
1	09 : 00 to 17 : 00	Mon to Fri	GotoIVR	openhours	Save
2	17 : 01 to 08 : 59	Mon to Fri	GotoIVR	closed	Save
3	00 : 00 to 23 : 59	Sat to Sun	GotoIVR	Weekend	Save Delete
4	00 : 00 to 00 : 00	Mon to Mon	Select..		Save <input type="checkbox"/>

The schedule contained in *Example 1* behaves as follows:

1. If the time is between 09:00 and 17:00 on a day between Monday and Friday, the call will be sent to the IVR named "openhours"
2. If the time is between 17:01 and 08:59 on a day between Monday and Friday, the call will be sent to the IVR named "closed"
3. If the time is between 00:00 and 23:59 on a day between Saturday and Sundays (ie weekends), the call will be sent to the IVR named "Weekend"

### Example 2



Priority:	Time Range:	Day Range:	Action:	Value:	
1	12 : 30 to 13 : 00	Mon to Fri	GotoVoicemail	101	Save
2	09 : 00 to 17 : 00	Mon to Fri	GotoIVR	openhours	Save
3	00 : 00 to 23 : 59	Mon to Sun	GotoIVR	closed	Save Delete
4	00 : 00 to 00 : 00	Mon to Mon	Select..		Save <input type="checkbox"/>

The schedule contained in *Example 2* behaves as follows:

1. If the time is between 12:30 and 13:00 (i.e. lunch time) on a day between Monday and Friday, the call will be sent to voicemail mailbox 101
2. If the time is between 09:00 and 17:00 on a day between Monday and Friday, the call will be sent to the IVR named "openhours"
3. If the time is between 00:00 and 23:59 on any day (Monday to Sunday), the call will be sent to the IVR named "closed"

Note that in Example 2, if an occasion arises where a call comes into this schedule and the time is between 12:30 and 13:00 on a weekday, there are 3 possible matches for this time condition.

All three priorities in this schedule (1, 2, and 3) are a match. Because schedules are executed in order of priority from lowest to highest (1 to 3), the first match in this schedule would be priority 1, which would send the call to voicemail mailbox 101.



# Configure Conferences

## Conference Overview

Often the need arises for several people to be involved in a telephone conference from different locations.

Using Conference Rooms makes it possible for multiple callers to dial into a conference room and all conference together.

Conference rooms are protected by a pin number. When callers first dial a conference room number, they are required to enter the pin number for that conference room on their telephone keypad before being granted access.

Conference Room numbers are allocated automatically. They are 3 digit numbers ranging from 901 to 999.

It is possible to dial a conference room directly using its conference room number (eg 901) from any SIP phone connected to your SmartPABX.

It is also possible to configure one or more of your direct indial (DID) numbers to route to a conference room (see Configure Direct Indials). This allows callers outside of your PABX to gain access to your internal conference room.

## Creating a Conference Room

To create a new Conference Room, login to your SmartPABX web interface and complete the following steps:

- Click on the “Configure Conferences” menu option
- At the bottom of that page, click on the “Create a new conference room” button
- You will be presented with a page similar to the image displayed below
- The pin number will be generated automatically, but can be changed if required

Conference Number:	Conference Pin:	
901	7925	<input type="button" value="Save"/> <input type="button" value="Delete"/>

## Deleting a Conference Room

To delete a Conference Room, login to your SmartPABX web interface and complete the following



steps:

- Click on the “Configure Conferences” menu option
- Click the “Delete” button next to the conference room you wish to delete



# Configure Ring Groups

## Ring Group Overview

A ring group can be used to define a list of members (either SIP extension numbers, or PSTN phone numbers) that can then be used by other applications within the SmartPABX to dial all of those numbers at once (in a ring-all type fashion, where the first person to answer receives the call).

A ring group is useful when one person could be at two or more different locations, and they need to be able to answer their calls from any of those locations.

By creating a ring group and defining the extension numbers (or PSTN numbers) of those locations as members of the ring group, when a call rings this ring group all phones in the ring group will ring, and the person can answer the call on any of those ringing phones. Once the call is answered from one of the ringing phones, all other phones immediately stop ringing.

This functionality is sometimes referred to as single number reach.

Ring groups can be dialed in the following scenarios:

- A ring group can be dialed from within an IVR using the “Dial” action. See “Configure IVRs” for more details.
- A ring group can be dialed when an extension has the “Send inbound to Ring Group” option enabled. See “Configure Extensions” for more details.

Ring groups cannot be dialed in the following scenarios:

- A ring group cannot be dialed from within a Queue
- A ring group cannot be set as an action for a Direct Indial number.

For a Direct Indial number to be configured to dial a ring group, the Direct Indial number must either:

1. be configured to first route through an IVR (using GotIVR), and that IVR should dial the ring group (using the “Dial” action)
2. be configured to first route to an extension (using GotoExtension) which has the “Send inbound to Ring Group” option enabled.

## Creating a new Ring Group

To create a new Ring Group, login to your SmartPABX web interface and complete the following steps:



- Click on the “Configure Ring Groups” menu option
- At the bottom of that page, click on the “Click here to add a new Ring Group” button
- Enter a name for your Ring Group, and then click “Create Ring Grop”

## Modifying Ring Group Members

To add or remove members to a Ring Group, login to your SmartPABX web interface and complete the following steps:

- Click on the “Configure Ring Groups” menu option
- Click on the “Edit” button next to the Ring Group you wish to modify
- A page similar to the image below will be displayed



- Members can either be 4 digit extension numbers, or can also be 10 digit PSTN numbers
- Once you have finished defining your Ring Group Members, click the “Update Ring Group” button

## Deleting a Ring Group

To delete a Ring Group login to your SmartPABX web interface and complete the following steps:

- Click on the “Configure Ring Groups” menu option





- Click the “Delete” button next to the Ring Group room you wish to delete
- You will be asked if you are sure you wish to delete that Ring Group. Click “Yes”.



# Configure IVRs

## IVR Overview

An IVR (Interactive Voice Response) is a PABX application that communicates with a caller through configurable voice driven menus. Callers can be played different announcements (using WAV audio files), and can optionally be presented with different menu options, where the IVR can be programmed to perform different actions depending on the callers menu response (via keypad DTMF input).

IVRs can be very complex, or very simple. Some IVRs may contain hundreds of lines of priorities while others may only contain one or two that perform basic call routing tasks.

An IVR is programmed on a line by line basis from top to bottom. Each line (from top to bottom) is executed by order of priority, from lowest to highest. When a call is routed to an IVR, the first priority that will be executed is priority 1, and then 2, and 3, and so on.

Please see below for an example of a simple IVR that answers the call, plays a sound (WAV) file to the caller, and then sends the call to voicemail box 101 and finally hangs up.

Priority:	Action:	Value:	
1	Answer ▾	N/A	Save
2	Play ▾	welcome.wav ▾	Save
3	Wait ▾	3 secs	Save
4	GotoVoicemail ▾	101 ▾	Save
5	Hangup ▾	N/A	Save Delete
6	Answer ▾		Save <input type="checkbox"/>

As demonstrated in the example above, each line (priority) of the IVR above contains an “action” and a “value”. Those actions and values can be changed to accommodate your requirements. In this particular example IVR there are no menu options defined, however that will be covered further in this section.

## Description of IVR Actions

### Answer

The Answer action will cause the PABX to pick up (answer) the call. This option should present in every IVR where sounds are to be played to the caller.

It is not necessary (nor possible) to set any value for the Answer action.

At completion of this action, control will be passed to the next highest priority in the IVR.



## Ringing

The Ringing action will generate a “ringing” tone to the caller. The Ringing action should always be immediately followed by the Wait action; the time defined in the following Wait action will determine the length of time that “ringing” tone is generated for.

It is not necessary (nor possible) to set any value for the Answer action.

The Ringing action does not listen for DTMF input from the caller.

At completion of this action, control will be passed to the next highest priority in the IVR.

## Play

The Play action will play the selected WAV audio file to the caller.

The Play action will also listen for DTMF input from the caller, and will execute the number option pressed by the caller if the IVR number option feature has been programmed.

At completion of this action, control will be passed to the next highest priority in the IVR.

## Wait

The Wait action causes the IVR to pause for the number of seconds defined in the value field.

The value field accepts numeric characters containing the number of seconds to wait for. It also accepts values expressed as either whole numbers or fractions of seconds (eg 0.3 would cause the IVR to wait for 300 milliseconds, or 1.8 would cause the IVR to wait for 1.8 seconds).

At completion of this action, control will be passed to the next highest priority in the IVR.

## WaitExten

The WaitExten action behaves the same as the Wait action; the only difference is that the WaitExten action will also listen for DTMF input from the caller, and will execute the number option pressed by the caller if the IVR number option feature has been programmed.

At completion of this action, control will be passed to the next highest priority in the IVR (i.e. the next line).

## Dial

The Dial action can dial either a:

- 4 digit extension number
- 10 digit PSTN number
- Ring Group



The value field should contain either the number to dial, or the name of the Ring Group.

The number to dial can also optionally be followed by a comma, and then the amount of seconds to dial for. If this option is not present, the Dial command will dial for 30 seconds before return control to the next priority of the IVR.

Please be aware that when a called party answers a call initiated using the Dial action, the IVR loses control of the call. The call will never be returned to the next priority of the IVR, because when the call is finished the called party will hang up, effectively terminating the call.

Only when a call initiated using the Dial action goes unanswered will control be passed back to the next priority of the IVR.

#### **Dial Example 1:**

*9001,25*

The dial value above would dial extension 9001 for 25 seconds, and then if unanswered would return control to the next priority of the IVR.

#### **Dial Example 2:**

*MyRinggroup,10*

The dial value above would dial all members of the Ring Group named MyRinggroup 10 seconds, and then if unanswered would return control to the next priority of the IVR.

#### **Dial Example 3:**

*0394949494,20*

The dial value above would dial the 0394949494 PSTN number for 20 seconds, and then if unanswered would return control to the next priority of the IVR.

#### **Dial Example 4:**

*9008*

The dial value above would dial extension 9008 for 30 seconds, and then if unanswered would return control to the next priority of the IVR. The Dial command would use 30 seconds as the default length to dial in this case, because the length was not specified.

#### **Dial Example 5:**

*MyRinggroup*

The dial value above would dial all members of the Ring Group named MyRinggroup for 30 seconds, and then if unanswered would return control to the next priority of the IVR. The Dial command would use 30 seconds as the default length to dial in this case, because the length was not specified.



## GotoVoicemail

The GotoVoicemail action will send the call to the mailbox number specified in the Value drop down menu box.

It is important to note that when sending a call to a Voicemail box using the GotoVoicemail action from an IVR, the busy/unavailable greeting for that mailbox is not played. The call is instantly transferred to the point at which the caller hears a beep to being recording their message.

Therefore if you wish for a greeting to be played to the caller before them leaving a message, you should make the priority before the GotoVoicemail action a Play action, and it should Play a WAV file greeting to the caller before it is sent to voicemail.

After the caller has been sent to voicemail,, control is not passed back to the IVR (as the call is terminated by the caller hanging up).

## GotoDirectory

Send caller to the Corporate Directory

## GotoIVR

The GotoIVR action is used to send a caller to another IVR.

Select the name of the IVR to send the caller to from the drop down menu box

At completion of this action, control will be passed to the new IVR.

## GotoQueue

The GotoQueue action is used to send a caller into a Queue

Simply select the name of the Queue to send the caller to from the drop down menu box

At completion of this action, control will be passed to the next priority in the IVR

Please note that the length of time that the caller will remain in the queue before control is passed back to the next priority of the IVR is defined within the Queue Configuration for that Queue (see "Maximum Join Time"). When the "Maximum Join Time" is reached, control will be passed back to the next priority in the initiating IVR.

## Hangup

The Hangup action is used to hang up (terminate) the call.

The Hangup action should be used as the last line in all IVRs.

## Read Text

The Read Text action will read out the text in the box to the listener. Note that errors can occur if punctuation is used here.



## Date Redirect

This option will redirect to a selected IVR if this option is reached within a certain specified date range. This option will take into account all times of day during the selected dates. For example, if the dates chosen are 1 to 10 and the month chosen is August, then if this option is reached at any time during the 1st to 10th of August, the person calling will be directed to the IVR selected.

If either date or the month are set to N/A, then this redirect will apply to all dates or months, depending upon the option. For example, if the date is set from 1 to 2 and the month is set to N/A, then in the first or second day of any month the person calling will be directed to the IVR selected.

## Day Redirect

This option will redirect to a selected IVR if this option is reached within a specific time range on a certain day. If this option is reached within the specified time range and on the day or day range selected, the person calling will be directed to the selected IVR. For example, if the time is set to 9:00 to 17:00 and the day redirect selected is Monday to Friday, then someone reaching this option between 9 AM to 5 PM on a Monday to Friday will be redirected to the IVR selected.

## Caller ID Redirect

This option will redirect the caller to a specified IVR if the caller ID matches the first few digits you have specified. For example, if you have entered 03 into the field, then a caller whose number begins with 03 will be redirected to the specified IVR upon reaching this option. You may specify as many numerals as you wish into this field.

## Set Music on Hold Group

This will allow you to set up a music on hold group for the duration of this call. Whatever music on hold group you set here will be played if the user on the other end of the phone is put on hold.

## Adding number options to an IVR

Some IVRs may include the ability for callers to press keypad digits to navigate through the IVR.

For example, a company with three different departments may want to play a sound file in their IVR that instructs their callers to press 1 for Sales, 2 for Accounts, and 3 for Support.

At any point in your IVR where a WaitExten or Play action is underway, the system will be listening for DTMF input from the caller.

When any digit is pressed, the IVR then performs whatever task it is programmed to for that option number. So for example in the case where a caller presses 1 for Sales, the IVR can be programmed to, for example, send the call into the Sales Queue. And if the caller presses 2 for Accounts, the IVR can be programmed to, for example, send the call into the Accounts queue.

Adding number options to your IVR is a simple procedure.

At the bottom of every IVR, the feature is present. Under the "Editing IVR number options" heading, simply select the number of the option you wish to add (for example "1", for sales), and then click Go.



A new option number will be created. Just like with IVRs themselves, option numbers can have different priorities that are executed in order from lowest to highest.

Below is an example of the “Number Options” of an IVR that is configured with three different number options (1, 2 & 3), each of which are performing a different action with multiple priorities:

Option Number:	Priority:	Action:	Value:	
1	1	<input type="text" value="GotoIVR"/>	<input type="text" value="Accounts"/>	<input type="button" value="Save"/> <input type="button" value="Delete"/>
2	1	<input type="text" value="GotoIVR"/>	<input type="text" value="Sales"/>	<input type="button" value="Save"/> <input type="button" value="Delete"/>
3	1	<input type="text" value="GotoIVR"/>	<input type="text" value="Support"/>	<input type="button" value="Save"/> <input type="button" value="Delete"/>

Add new option number:

In the above example, if the caller presses 1 the PABX will firstly play the sound file named “welcome-sales.wav” to the caller, and will then send the caller into the IVR named Sales.

If the caller presses 2 the PABX will firstly play the sound file named “welcome-accounts.wav” to the caller, and will then send the caller into the IVR named Accounts.

If the caller presses 3 the PABX will firstly play the sound file named “welcome-support.wav” to the caller, and will then send the caller into the IVR named Support.



# Configure Queues

## Queue Overview

A Queue can be used to 'queue' your inbound calls, playing hold music to the caller until someone is available to take the call. Each caller into the queue maintains their position in the queue, and the calls are delivered to "members" in the order in which they came into the queue.

A queue can also be configured to play sound file announcements periodically while the caller waits, and can also be configured to announce the position of the call in the queue to the caller periodically.

A queue must contain 'members', which is the term used to describe a telephone/extension that is logged into a queue, ready to answer calls. Up to 20 members can be logged into any queue.

Members can be either 4 digit extension numbers (eg. 9002) or can also be 10 digit PSTN numbers (eg 0399999999).

There is no limit on how many inbound calls can be waiting in a queue at any one time. The only limits are defined by the number of lines your SmartPABX supports.

All calls that are being sent into a queue must first be routed through an IVR, and that IVR should use the "GotoQueue" action to send the call to the queue.

## Creating a New Queue

To create a new queue, login to your SmartPABX web interface and complete the following steps:

- Click on the "Queues" menu option
- At the bottom of that page, click on the "Click here to add a new extension" button
- You will be presented with a page similar to the following

## Description of Queue Options

### Select a ring strategy for this queue

The ring strategy field defines the way in which the PABX delivers calls to queue members.

- ringall: ring all available members until one answers (default)
- rrmemory: round robin with memory, remember where we left off last ring pass
- leastrecent: ring member which was least recently called by this queue
- fewestcalls: ring member with fewest completed calls from this queue
- random: ring random member





## Select maximum join time

The maximum join time field defines the maximum length of time in minutes that a caller can be waiting in a queue before being dropped from the queue and sent to the next priority of the IVR which sent the call to this queue.

## Select ring cycle length for this queue

The ring cycle length field determines the length of time in seconds that the PABX will attempt to ring queue members for. The PABX will then wait for the length of time defined in “wrap-up time” before trying the ring cycle again. This continues until the call is answered, or the maximum join time is reached.

## Select wrap-up time for this queue

The wrap-up time field describes the length of time the PABX waits after an agent completes a call before sending another call to that member.

## Select the frequency of queue position announcement

The frequency of queue position announcement field defines the intervals in seconds at which the caller's position in the queue is announced to them.

If this option is enabled, at the defined intervals the PABX will play an announcement to the caller, informing them of their position in the queue.

## Select an announcement to play periodically

Select an announcement (WAV sound file) that will be played to the caller every X seconds (seconds defined in the frequency field below)

## Announce queue name on answer

This options relates mainly to members of a queue and is helpful when a single person must monitor multiple queues. Turning this setting on will have the PABX read out the name of the queue to the member answering the call. No recording is required, as the audio is taken from the name of the queue itself.

## Can callers join this queue if no members are log in

This field describes whether or not a caller will be able to join a queue if there are no members logged into that queue. If this option is set to No, the call will be dropped from the queue and sent to the next priority of the IVR which sent the call to this queue.

## Ring agents who are already on the phone

This field defines whether the PABX will send further calls to members who are already on phone calls. If set to Yes, this option would only work if the member has call waiting activated on their telephone.



## SLA Target for this queue

This field is used for statistics only.

## Digit input from caller

If a caller presses any digit on their telephone keypad while waiting in the queue, commands can be configured to run when that digit is pressed.

## Music On Hold Group for this queue

The music on hold group selected here will be played to users whilst they are in this queue prior to speaking to someone in the queue.

## Deleting a Queue

To delete a queue, login to your SmartPABX web interface and complete the following steps:

- Click on the “Configure Queues” menu option
- Click the “Delete” button next to the queue you wish to delete
- You will be asked if you are sure you want to delete this extension. Click “Yes”.



# Extension Console

## Extension Console Overview

The Extension Console page shows the current status of every extension on the PABX. The page is update live in real time.

- idle – Extension is not on a call
- in use – Extension is on a call
- ringing – There is a call currently ringing on this extension

Extension: 9001 (in use)

Extension: 9002 (idle)

Extension: 9003 (idle)

Extension: 9004 (idle)

Extension: 9005 (ringing)

Extension: 9006 (idle)

**Note:** If an extension is on a call, and also has another inbound call ringing on their phone, the status will show as “in use” rather than “ringing”.

If your extensions are associated with groups, you can filter the extensions shown by group if you desire. Simply tick or untick the boxes corresponding to each group below the extension statuses. By default, all extensions in groups will be shown on going to the Extension Console. If you wish to see the status of an extension which is not in a group, either add it to a group, or tick the *Show All Extensions* box. You can add or change the group an extension is in by editing it.



# Call Records & Recording

## Call Records and Recording Overview

The Call Records and Recordings section of the SmartPABX allows the administrator to view the records of all calls processed by the SmartPABX.

If call recording was enabled for any particular call, it is also possible for the administrator to download the WAV file recording of the call, using the “Listen” link at the end of the record.

To search for a particular call or group of calls, you may search based on any combination of the following criteria:

**From Date** – to search a particular day range, set From Date to the start date of the range

**To Date** – to search a particular day range, set To Date to the end date of the range

**Account Code** – search for calls that are either equal to or containing a particular Account Code value

**Caller ID** – search for calls containing a particular Caller ID value

**Destination** – search for calls containing a particular Destination value

**Duration** – search for calls that are either equal to, greater than or less than a particular duration (seconds)

### Search Call Records

<b>From Date:</b>	Day: <input type="text" value="27"/>	Month: <input type="text" value="Aug"/>	Year: <input type="text" value="2014"/>
<b>To Date:</b>	Day: <input type="text" value="27"/>	Month: <input type="text" value="Aug"/>	Year: <input type="text" value="2014"/>
<b>Account Code:</b>	<input type="text" value="Equals"/> <input type="text"/>		
<b>Caller ID:</b>	<input type="text" value="Contains"/> <input type="text"/>		
<b>Destination:</b>	<input type="text" value="Equals"/> <input type="text"/>		
<b>Duration:</b>	<input type="text" value="Equals"/> <input type="text"/> (in seconds)		
<b>Order Results By:</b>	<input type="text" value="Call Date"/> <input type="text" value="Descending"/>		
<b>Results Per Page:</b>	<input type="text" value="50"/>		

You may navigate the call records using these filters and the page numbers at the bottom of the page. These numbers also include links to the first and last pages of the search when available.



# System Sounds

## System Sounds Overview

System Sounds are used by IVRs and Queues to play pre-recorded announcements to callers.

All system sounds are stored as WAV files. Prior to uploading any WAV files to the SmartPABX you should ensure that your WAV files are saved as Windows PCM 16-bit 8000hz Mono files. WAV files of any other type may not play correctly.

## Upload a new WAV sound file

To upload a new WAV sound file to your SmartPABX, login to your SmartPABX web interface and complete the following steps:

- Click on the “System Sounds” menu option
- At the top of that page, click on the “Browse” button
- Select the WAV file on your computer
- Click on the “Upload” button

The file:  No file selected.

File Name	Type	Sample Rate	Channels	Bits	Duration (Seconds)		
Message_1.wav	wav	8000	1	16	40	<input type="button" value="Play"/>	<input type="button" value="Delete"/>
Message_2.wav	wav	8000	1	16	41	<input type="button" value="Play"/>	<input type="button" value="Delete"/>
Message_3.wav	wav	8000	1	16	39	<input type="button" value="Play"/>	<input type="button" value="Delete"/>

Alternatively, you can make system sounds yourself by dialling the number 25 into your handset, and then following the instructions that follow. After you have finished making this recording, it will appear in the list of system sounds with the name custom\_recordingX.wav, with X being incremented as each custom recording is made.

If you wish to rename any of your system sounds, simply press the Rename button for that sound, and type in the new name you wish. Some characters may be replaced, and if you attempt to rename a sound to one which already exists, you will be unable to.



# Music On Hold

## Music On Hold Overview

Music on hold files are used when a call is put on hold or parked. Whilst there are default sounds which come with your SmartPABX, like with the systems sounds you may upload your own custom recordings.

System sounds may be stored as either an MP3 or a WAV file but it is highly recommended that you use a similar quality and length of sound files as you would with your system sounds. All Music On Hold sounds are saved on your SmartPABX system.

Music On Hold can also group files together. This is useful for if you need to use specific sound files for different queues, or if you wish to set a specific music on hold group as the wait music for an IVR. In order to add a new group, press the Add Group button and choose a name for the new group. Within this new group, which you can navigate to by selecting that group from the drop-down menu of groups, you can upload sounds, or edit and delete them as with the default group. If you wish to delete a music on hold group, simply press the *Delete* button whilst on the page for that group.

## Upload a new Music On Hold sound file

To upload a new file for Music On Hold to your SmartPABX, login to your SmartPABX web interface and complete the following steps:

- Click on the “Music On Hold” menu option
- At the top of that page, click on the “Browse” button
- Select the MP3/WAV file on your computer
- Click on the “Upload” button

### Music On Hold

You can Upload WAV or MP3 File below:

#### Upload File

No file chosen

#### Current On-Hold Sounds

File Name	Type	Sample Rate	Channels	Bits	Duration (Seconds)			
how_may_we_help.mp3	mp3	44100	2	0	2	<input type="button" value="Play"/>	<input type="button" value="Delete"/>	<input type="button" value="Rename"/>
welcome.mp3	mp3	22050	1	0	98	<input type="button" value="Play"/>	<input type="button" value="Delete"/>	<input type="button" value="Rename"/>

[Clear On-Hold Sounds](#)



If the upload has completed, your new sound should show in the “Current On Hold Sounds” table. Note that if it isn’t in the table or there are no details for the sound (type, sample rate, channels, bits and/or duration are blank) the file itself was either too large in size or invalid. If this is the case, the sound will most likely result in silence during call holding.

As with system sounds, the same playback, deletion and renaming functionality is present and these changes will be fully applied once you click the “Apply Changes” button.

By default, on hold sounds will play in a random order. If you wish to have this changed, please contact support.



# Miscellaneous Mailboxes

## Miscellaneous Mailboxes Overview

Miscellaneous voicemail mailboxes are used when voicemail is required but it is not suitable to use a staff member's personal voicemail box attached to their extension. For example, in the case where you want your customers calling your main number to be able to leave a voicemail message for you if you are closed, you may need a voicemail box which plays a generic voicemail greeting to the caller informing that that you are currently closed, rather than a personal staff member's voicemail greeting. In cases like this that you would use a miscellaneous voicemail box.

Mailbox numbers for miscellaneous voicemail boxes are allocated automatically from 101-199.

Miscellaneous voicemail boxes operate just like a standard voicemail box attached to an extension number. You can check your voicemail by dialling \*1 from your handset and logging in with your mailbox number and pin, and you can also configure the SmartPABX to email voicemail messages as WAV files to an email address.

Mailbox:	Pin:	Email Address:	
101	3007	sales@business.com	<input type="button" value="Save"/> <input type="button" value="Delete"/>
102	1250	reception@business.com	<input type="button" value="Save"/> <input type="button" value="Delete"/>
103	6752	support@business.com	<input type="button" value="Save"/> <input type="button" value="Delete"/>





# Queue Stats

## Queue Statistics Overview

Queue Statistic is a useful tool that provides an overview on inbound calls to queues.

Queue:	Ring Strategy:	Calls Waiting:	Avg Wait:	Avg Talk Time:	Completed:	Abandoned:	Members:	SLA Target:	SLA:
Accounts	ringall	0	0 seconds	0 seconds	0	0	1	30 seconds	0.0%
Sales	fewestcalls	0	0 seconds	0 seconds	0	0	2	30 seconds	0.0%
Support	ringall	0	0 seconds	0 seconds	0	0	3	30 seconds	0.0%

You can also view the stats for a queue on a past date by selecting a date from the input box in the top-right hand corner of the page. Once you have selected a date, it will show the statistics for that queue as it was by the end of that day.



# Call Parking

## Call Parking Overview

Call Parking is used to disconnect a caller from your handset and place them on hold. Any extension is then able to pickup the on-hold call. If the caller is left on hold for longer than a pre-defined time it will return the caller to the original extension that placed it on hold.

## Call Parking Settings

Call Parking Options	
<b>Parking Extension:</b>	700
<b>Parking Positions:</b>	<input type="text" value="5"/>
<b>Parking Time (seconds):</b>	<input type="text" value="60"/>

The parking extension is not editable, but it displayed on this screen.

Parking positions is the number of parking lots that are available. These are numbered from 1 after the parking extension displayed above. In this example screenshot the parking extensions will be 701,702,703,704,705

Parking time is the timeout before the parked call is returned back to the original extension.

## Using Call Parking from a Handset

To place a caller into a Parking lot, you need to transfer the call to the Parking Extension.

If you transfer the caller to the first number (700), it will assign the next available parking lot (starting with 701) to the caller. The PABX will read the extension of the parking lot that it is placing the caller into.

To retrieve the call, dial the parking position from any handset, for the first caller, this will be 701.

You can also transfer a caller directly to any parking position by transferring them directly to that parking position. For instance the last parking lot is 705. If you transfer the caller to 705, you can then retrieve the caller using 705. Please note that if a parking lot is already in use for another caller, you will instead join those two external callers together. It is recommended to use this only with an assigned phone key where you can see the status of the line at any time before connecting the external caller.

The setup a monitor/BLF button for parking lots, this can be configured on the call parking extension



(701 onwards) as per extension BLF settings for your handset.

The provisioning tool for handsets built into the PABX system supports parking on Cisco SPA525G2 and Cisco SPA504 handsets with or without extension consoles.



# Listen/Monitor

## Configuration

Define groups of phones that can be listened in on by supervisors. Optionally supervisors can 'whisper' to the extension but remain silent to the external caller.

The feature can be found under 'Listen Groups'

The screenshot shows the 'Virtual PABX Administration Console' interface. At the top, there's a header with the 'broadband solutions' logo and a 'Help Desk 1300 683 000 (option 3)' link. Below the header, a navigation bar includes links like Home, Extensions, IVRs, Direct Indials, Conferences, Ring Groups, Queues, Queue Stats, Listen Groups, Extension Console, Call Records/Recordings, Reports, System Sounds, Miscellaneous Mailboxes, and DID Scheduler. The main content area is titled 'Configure Listen Groups' and features a table with columns: Extension, Listen Group Name, Supervisors, Members, Whisper, and Quiet. A single row is visible with the extension 555, group name 'test', 1 supervisor, 1 member, and both Whisper and Quiet features disabled. There are 'Edit' and 'Delete' buttons for this group, and an 'Add a new Listen Group' button at the bottom.

Extension	Listen Group Name	Supervisors	Members	Whisper	Quiet
555	test	1	1	Disabled	Disabled

Add a new listen group:

The form is titled 'Create Listen Group' and 'Adding New Listen Group'. It contains a label 'Listen Group name:' followed by a text input field. Below the input field is a 'Create Listen Group' button.

The first step is to give the group a name. The name is purely descriptive.



## Configure Listen Groups

Extension	Listen Group Name	Supervisors	Members	Whisper	Quiet		
555	test	1	1	Disabled	Disabled	<a href="#">Edit</a>	<a href="#">Delete</a>
556	Example	0	0	Disabled	Disabled	<a href="#">Edit</a>	<a href="#">Delete</a>

[Add a new Listen Group](#)

The extension for monitoring is auto assigned, starting at 555. Click edit to start configuring the group.

Editing Listen Group "test" x555

Supervisor extensions:

9003

Whisper enabled:

☐

Quiet enabled:

☐

Members:

9001

Update Listen Group

### Supervisor extensions:

A list of extensions that are allowed to access the listen feature. Any attempts to call the listen number that are not on the supervisor list will play a busy beep and hang up.

### Whisper enabled:

With this feature enabled, the supervisor is able to be heard by the person being monitored, but not the external caller.

### Quiet enabled:

With this enabled, the announcement of the channel you are listening to is suppressed. This allows quicker shifting between calls. With it disabled the channel extension will be announced to the supervisor when first entering or changing the channel.



## Members:

A list of extensions to be monitored by this group.

Both the supervisor and members list are 1 extension per line.

The supervisor and members list must contain at least 1 extension each before the listen feature will be active and available.

When completed click update listen group.

## Usage

To listen to in place calls, from a defined supervisor phone dial the extension assigned to the listen group (the first will be 555, the second 556 etc)

If there is a call in place, at beep will play then the extension number.

To move between extensions press \*

To listen to a particular extension dial the extension number then #

Press # to change the volume level (-4 to +4)

When no calls are in place, the line will be silent. As soon as a call is placed the monitor will announce the extension and start listening in.



# Reporting

## Introduction

The reporting feature in the SmartPABX allows managers to quickly get an overview of agents activity from a live report.

## Creating a report group

Editing Report Group "sales" (1)	
Description:	Sales Reports
Username:	sales
Password:	password
Day KPI (mins):	90
Week KPI (mins):	450
Associated Queues for Members:	<input type="checkbox"/> AccountsQueue <input type="checkbox"/> Afterhours <input type="checkbox"/> SalesQueue
Members:	9001 9002 9003 9004 9005

Each manager 'login' contains a set of extension numbers. This group of extensions is used to generate all reports for that manager login. Extensions can appear in multiple groups.

Login as the administrator on the SmartPABX. Access the report section and click 'Add a new Report Group'

1. Give this group a name. This is the username for the manager.
2. Click edit on the new group.
3. **Description:** This text will appear at the top of the reports
4. **Username:** This is the username a manager will login with.
5. **Password:** This is the password for the username the manager will login with
6. **Day KPI (mins):** In the bar graph of minutes over period for each extension, this Day KPI will



be used in the day report as the Target red line.

7. **Week KPI (mins):** As per day but for the week report
8. **Associated Queues for members:** For the statistics report the login/logout times are calculated from an agent logging in and out of the associated queues. Please see 'Queue settings for reports'
9. **Members:** List of extensions associated with this group.

## Queue settings for reports

Agents can login and logout via queues. The 'statistics' report and 'agent logs' display this information to the manager.

An extension user can login / logout to the queue by logging into the SmartPABX using their extension number and 'webpassword' (see Agent logins)

To allow a user to login / logout from the queue using only their phone, you can define a \* code using the Agent login code / Agent logout code

30 seconds \*

---

Agent Login code \*21 ▼

Agent Logout code \*31 ▼

---

*If a caller presses any digit while waiting in a queue you can*

The members list on the queues page overrides the agent logout. If an extension is defined here it will always receive calls to this queue. The report for agent login / logout will still work.

## Agent logins

### Administration

Each agent is able to login / logout, and have this information available in the manager report using either a \* code (see Queue settings for reports) or by logging into the web interface with the extensions users login details.

The admin can define an extensions login details on the configure extensions page.





Editing Extension Number 9200	
Extension Number:	9200
Extension Password:	<input type="text" value="4wctSVAm"/>
Extension Comment:	<input type="text" value="Extension 9200"/>
Web User Password:	<input type="text"/>
Concurrent Call Limit:	<input type="text" value="2"/> ▼
Extension Context:	<input type="text" value="active"/> ▼

**Extension number:** Is the username for the agent login.

**Web user password:** Is the password for the agent login.

**Extension Comment:** This field is used in the reports to display a text field associated with the extension. This could be a persons name or position.

### Agent / Extension login

An agent can login to update their settings and login/logout to the system by using their extension number and their assigned web password.

Once logged in an agent can login/logout using the Queue Membership: field and the associated queue login/logout button.



### Configure Extension 9200

Editing Extension Number 9200	
Extension Password:	*****
Extension Comment:	Extension 9200
Concurrent Call Limit:	2 ▼
Send inbound to Ring Group:	N/A ▼
Ringtime:	30 ▼
Queue Membership:	<b>SalesQueue queue agent login</b>
Voicemail:	<input checked="" type="radio"/> Enabled <input type="radio"/> Disabled
Voicemail Password:	123
Email Voicemails To:	voicemail@acquirestudent
Forward Calls To:	

Update Extension 9200

<b>Queue Membership:</b>	<b>SalesQueue queue agent logout</b>
--------------------------	--

## Reports

The reports can be viewed by either logging into SmartPABX with the defined report username/password or via the administration console on the report groups page by clicking 'view'

### Extension status

Sales							
2014-07-25		Day ▼	Combined ▼	Monitor&AutoRefresh: <input type="checkbox"/>		Refresh	
Extension	Call time (mins)	Call count	Avg time / call (mins)	Status	Since change (mins)	Total active today (mins)	Active call
Extension 9200 (9200)	0	0	0	SalesQueue : IN	15	15	
Extension 9201 (9201)	7	9	0.78				
Extension 9202 (9202)	33	29	1.14				36 secs
Extension 9203 (9203)	47	26	1.81				



**Call time (mins):** Total time recorded against this extensions

**Call count:** Total number of calls this extension has been involved with

**Avg time / call (mins) :** Total Call time / Total Call count

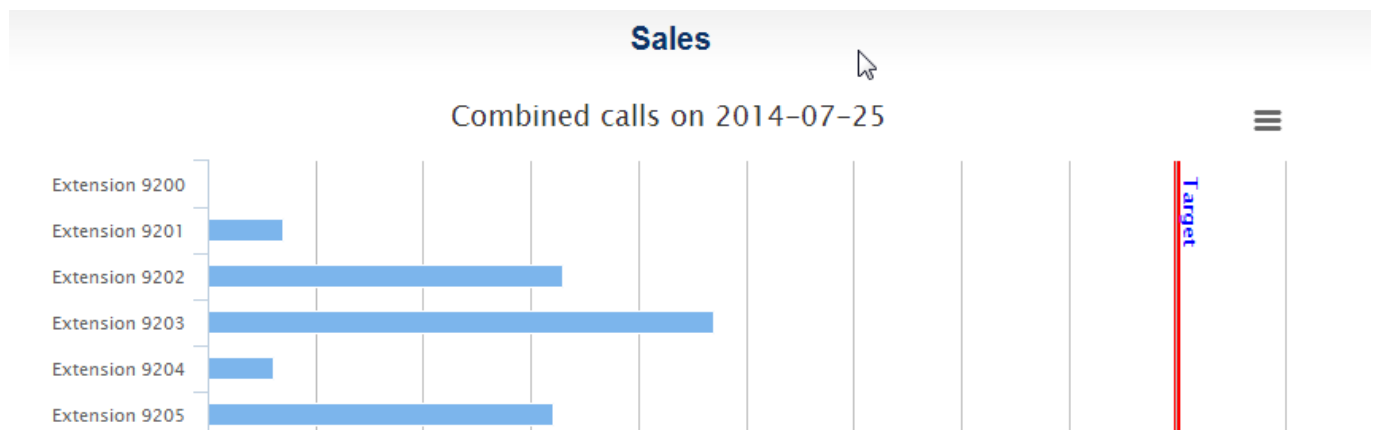
**Status:** Display the queues this agent is currently logged IN/OUT of.

**Since change (mins):** Time since the status was last changed. In this example the 9200 agent has been logged in for 15 mins.

**Total active time today (mins):** Total time logged into the queue, including any previous sessions already logged out today.

**Active call:** The agent is currently on an active call. This has not been included in the Call time column yet.

## Minutes SLA



Time on calls for each extension graphed against a 'Target' KPI.

The settings for the graph allow viewing previous data.

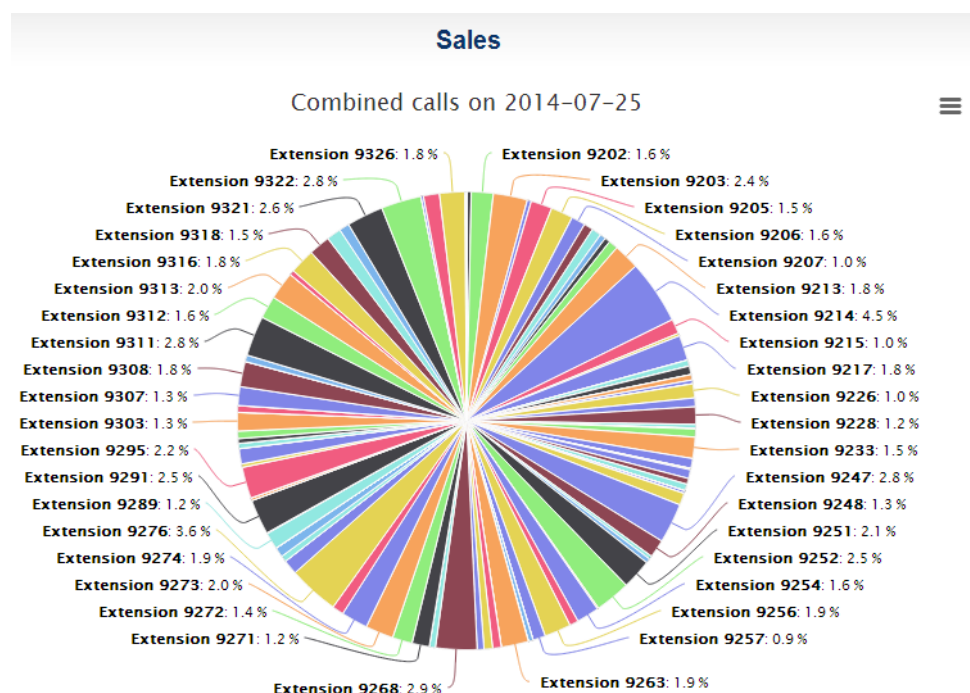
■ Time (mins)

2014-07-25    Day ▼    Combined ▼    Monitor&AutoRefresh: ☐    Refresh

The dates, Day or Week periods are selectable, and if the call time includes incoming / outgoing or combined data.

The monitor and auto refresh displayed the report without the interface and auto refreshes periodically.

## Minutes compare



This graph displays each extensions total call time for the period selected and compares to all over extensions.

## Queue stats

Displays incoming call status for each Queue.

Queue Statistics for Today									
Queue:	Ring Strategy:	Calls Waiting:	Avg Wait:	Avg Talk Time:	Completed:	Abandoned:	Members:	SLA Target:	SLA:
SalesQueue	ringall	0	0 seconds	0 seconds	0	0	0	30 seconds	0.0%

## Agent logs

Sales				
Agent logs				
2014-07-25		Any ▼	Refresh	
Extension	In time	Out time	Logged time	Queue name
9200	2014-07-25 11:17:15	2014-07-25 11:42:06	1491	SalesQueue

Report on completed sessions for each agent.

Date and member extension is selectable.



## Monitor and Refresh

Enable this option to display the report without banners and an automatic refresh. The URL contains a auth code that allows the report to be viewed with logging in by using the complete URL on another browser.

## Call records

View the call records for the users in this report group. An export option is available that will download the call records in CSV format suitable for loading and process in Excel.

## Queue Data

You can view data for a queue by clicking on either the Queue Stats, Historical Queue Data, or Ranged Queue Data buttons. Each will give a different set of information.

- **Queue stats:** View the queue stats for each queue at different days in the past. You can change the day you are viewing the statistics for by clicking on the box in the top-right hand corner of the page and selecting a date from the drop-down box. If there is no saved data for that day you will be informed that there are no configured queues for that day.
- **Historical Queue Data:** To compare stats between different queues on different days, you can choose the type of data you wish to view by selecting it from the drop-down box in the top right-hand corner. This will create a bar graph showing the values for each queue. If you wish to change the day you are viewing data for, select a date from the box that appears when you click in the Select Date box.
- **Ranged Queue Data:** In order to view queue stats over a period of time, you can select to view the time range as either a week or a month from the drop-down box at the bottom of the page. You can then choose the period by clicking in the box in the left, which will let you select the date or dates you wish to view data for. Finally, you can select the type of data for those queues by selecting it from the second drop-down list. Once you have selected all of the options for viewing data, press the Refresh button to view the data in a line graph.



# Backing Up and Restoring PABX Configuration

## Overview

In some cases it may be necessary to move the setup of one SmartPABX™ system to another, or there may be an instance where you need to revert the configuration back to a previous state on the same system. Using the backup and restore tool, you can download a configuration file for a SmartPABX™ which may be used to restore this configuration on the same or different system.

## Backup Process

Clicking on the “Backup & Restore” link in the navigation menu will take you to the relevant interface, the backup menu on the left of the screen and the restore menu on the right. Looking at the Backup side, the most notable feature is the checkbox list.

### Backup PABX Configuration

#### Select Config Groups To Backup

Only data relating to the groups you check will be backed up.  
If you are unsure as to what you need to backup; select all groups.

- ☐ Agent Logs and Status Data
- ☐ Call & Conference Data
- ☐ Direct Indial Settings
- ☐ Extension Configurations
- ☐ Received Faxes
- ☐ PABX Groups
- ☐ IVR Configurations and Data
- ☐ MYOB Configurations and Data
- ☐ Personal & Shared Contact Data
- ☐ Provision Configurations
- ☐ Queue Configurations and Data
- ☐ Portal Settings
- ☐ Management Tokens

☐ Select All

Output Name (Optional)

These options are known as “Config Groups” and they are the settings which you wish to backup. All data from the selected Config Group is saved to the backup file, this means that when restoring only the groups which were selected will be affected.

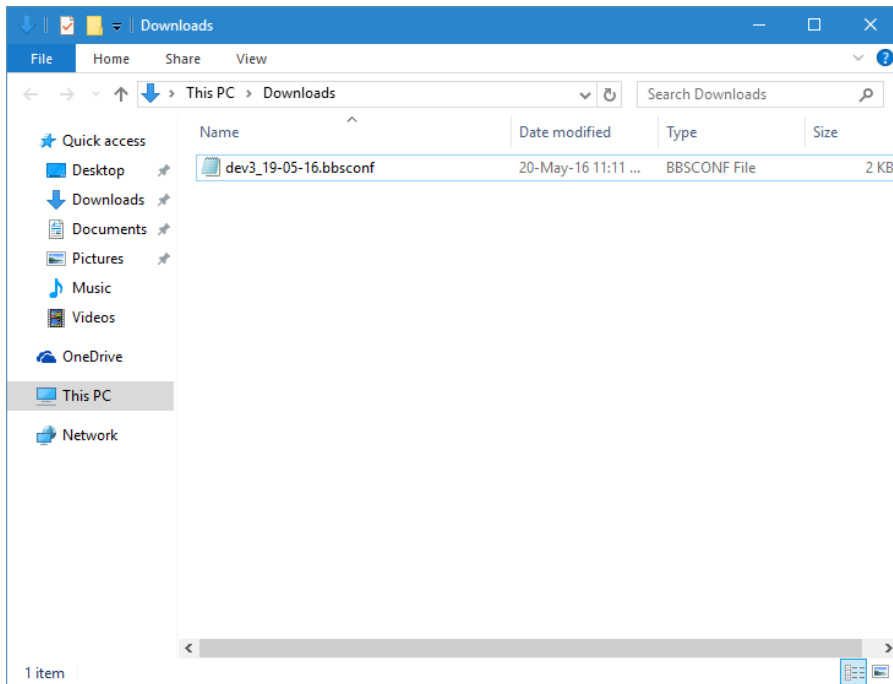
If you are unsure as to which groups you want or are interested in a full system backup, checking the “Select All” box will configure a full backup of the PABX configurations. This option is also very useful if you want a majority of the settings excluding a few, allowing you to uncheck the groups you do not wish to back up afterwards. Basically the backup will only note boxes which have been ticked and so it is up to you to decide which groups you want to save.

After you have decided which groups you want, you may set a filename for the backup. This is completely optional, by default, the file is named using the convention “[pabxname\_dd-mm-



yy].bbsconf". You can rename the file itself and this will not affect the settings kept in it.

Clicking the "Generate Config File" button will begin the backup process. This may take a moment, but after the backup has completed you will see a link to download the backup file itself.

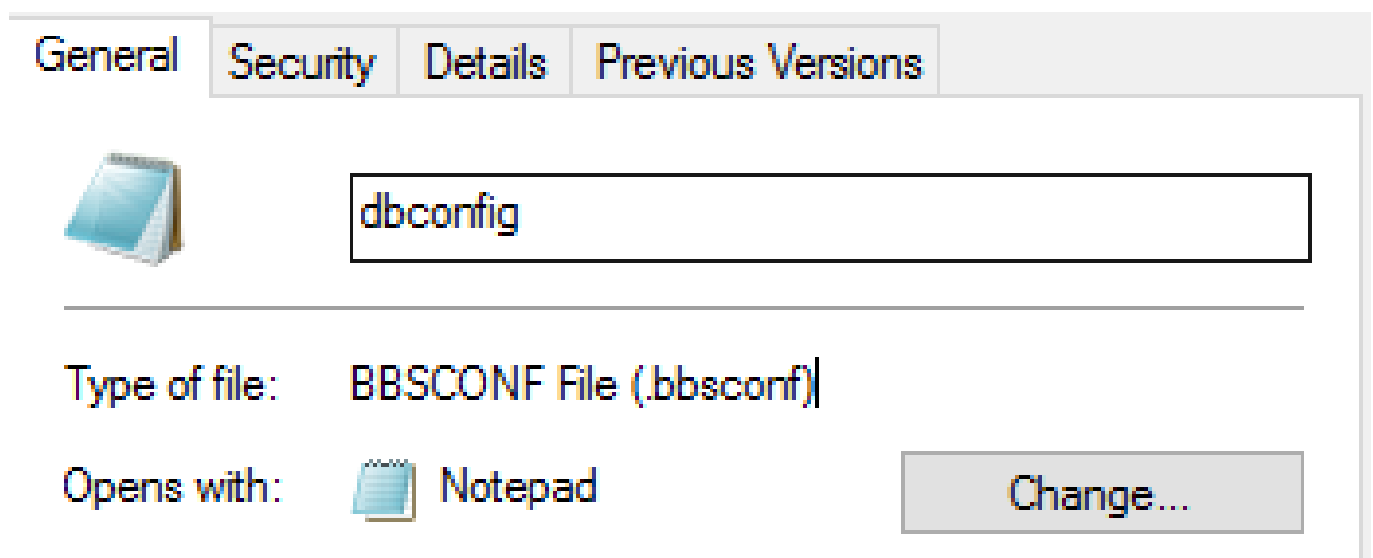


This file contains all the settings you selected to save from your SmartPABX™ system and is required for the restore process. Do not attempt to modify the contents of the file, as this will result in the backup failing.

## Restoring From Backup

As for the restoration, assuming you have the file saved from the backup, it is a relatively simple process which just requires you re-upload the backup file to the SmartPABX™.

If you have renamed the file and you are unsure that it is a valid backup file, look at its file extension.





A valid backup file ends in *.bbsconf* which is a special kind of file only usable with the SmartPABX™. This ensures your system's configuration is kept safe, the data in the file encrypted.

Returning to the same "Backup/Restore" page as before, you'll see on the right side of the page we see the "Restore PABX Configuration" form.

## Restore PABX Configuration

### Upload Config File

 Browse...

PABX configuration backup files end with the extension *.bbsconf*

Note that only the groups which were checked when generating the file will be restored.

Clicking on the upload field, select the **.bbsconf** file you wished to restore to. Note that the SmartPABX™ Restorer will work with any *.bbsconf* file, no matter when the backup was made or what groups it had selected.

Press "Restore From Backup" after uploading the file, and this will run the restore process. Like the backup, this may take a moment but you'll know it's complete when you see the "Restore Complete" prompt on the next page.

After applied, the PABX system will be exactly as it was when the backup was taken. Note that the system does wipe the selected database tables before restoring so ensure you have backed up all necessary settings and data from your SmartPABX™.





# Access Control

## Access Control

1 = grant access to all, 0 = no access  
To give only certain user access, use a comma seperated list of usernames  
For example "9001,9002"

Group	Access
user_console	<input type="text" value="1"/>
user_ext	<input type="text" value="1"/>
user_extensionconsole	<input type="text" value="1"/>
user_questextensions	<input type="text" value="1"/>
user_personalcontacts	<input type="text" value="1"/>
user_queuestats	<input type="text" value="1"/>
user_queue_membership	<input type="text" value="1"/>
user_sharedcontacts	<input type="text" value="1"/>
user_time_billing	<input type="text" value="1"/>

Save

The administrator can set access levels for user logins via this interface.

A value of 1 means the option is enabled for all users, 0 is disabled for all users.

To give only certain users access please enter a comma separated list of extensions that are allowed access.



# MYOB Integration

## Introduction

This section will detail how to use your PABX to automatically record incoming call details from clients and generate invoices for those clients using MYOB. In order to use this feature, you will need an a login for your MYOB account and a login for the company file(s) you wish to use.

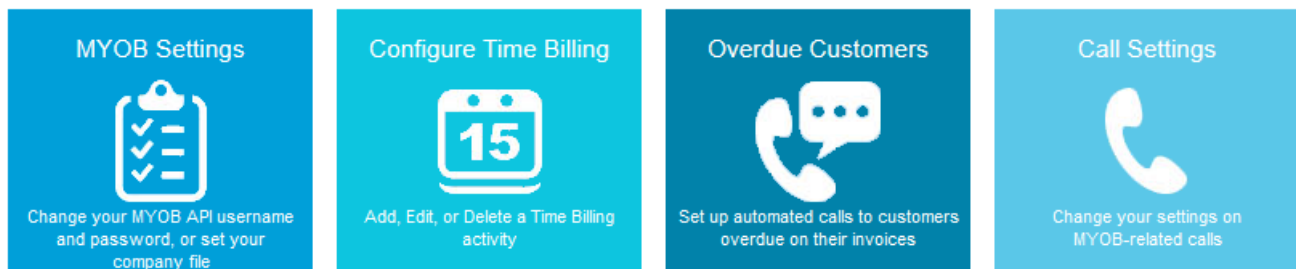
## Setting Up

Start by clicking on the MYOB Features button of your SmartPABX. After reading through the information on the screen, you will be taken to a secure MYOB login page. After putting in your MYOB email and password successfully, MYOB will authenticate your details, then redirect you to a new page.

### Welcome!

Navigate through the links below to sync your MYOB details with your Smart PABX or edit your settings.

[Return to admin console.](#)



The first thing you will need to do is set a company file on the MYOB Settings page. You will be unable to access any other features of MYOB until you do this. Upon navigating to the MYOB Settings page, input the username and password for the company file you wish to access, then select that company file. You can now access any part of the MYOB section of your PABX.

To navigate the MYOB features, simply press on any of the buttons in the above screenshot. If you wish to return to the main menu, simply press the *Return to admin console* text.

## MYOB Features

### Configure Time Billing

To configure your time billing activities, which are necessary for charging clients, press the Configure Time Billing button or navigate using the menu. This will take you to a form for creating a time billing activity, as well as presenting a list of any time billing activities that already exist.



## New Time Billing Activity

Name	Income Account	Tax Code When Sold	Rate per Hour	
<input type="text"/>	<input type="text" value="---"/>	<input type="text" value="---"/>	<input type="text" value="\$ 0.00"/>	<input type="button" value="Create Billing Activity"/>

To create a new time billing activity, simply fill in all of the appropriate fields and press Create Billing Activity. When creating this activity, it is assumed that the type of billing will be hourly. If your company charges by a different time value, please convert that value into the rate per hour before submitting the form. This form also assumes that the activity is using an activity rate for the calculation of the rate. Due to certain restrictions by MYOB, only certain income accounts and tax codes can be applied to time billing activities, and so the menus will only display those that are applicable.

If you wish to edit an activity, press the Edit button next to the one you wish to edit in the list. This will take you to a similar form to creating a new time billing activity. Simply edit the fields you wish and press the submit button.

If you wish to delete an activity, press the Delete button next to the one you wish to delete in the list of activities. Simply press the Yes button that comes up to delete the selected activity. Due to restrictions from MYOB, an activity cannot be deleted if it has previously been used for an invoice.

## Overdue Customers

The overdue customers setting allows you to set up reminder calls for customers who have an overdue invoice which needs to be paid. Navigating to this section will bring you to a list of all customers who currently have an overdue invoice.

Name	Company	Number to Call	Overdue	Frequency	Time to Call	On	Call on Weekends	
James Cameron		<input type="text" value="03 9536 3456"/>	\$11002373.19	<input type="text" value="Daily"/>	<input type="text" value="13:00"/>	<input type="text" value="Select When..."/>	<input checked="" type="checkbox"/>	<input type="button" value="Submit"/>
	Cash Sales	<input type="text" value=""/>	\$1123.13	<input type="text" value="Never"/>	<input type="text" value="9:00"/>	<input type="text" value="Select When..."/>	<input type="checkbox"/>	<input type="button" value="Submit"/>
	Footloose Dance Studio	<input type="text" value="02 9987 5689"/>	\$133.33	<input type="text" value="Weekly"/>	<input type="text" value="12:00"/>	<input type="text" value="Friday"/>	<input type="checkbox"/>	<input type="button" value="Submit"/>
	My Town Reality	<input type="text" value="039632 5634"/>	\$66.91	<input type="text" value="Interval"/>	<input type="text" value="9:00"/>	Every <input type="text" value="4"/> Days	<input checked="" type="checkbox"/>	<input type="button" value="Submit"/>

By default, customers are set not to receive reminder calls when they are overdue on an invoice; the calls need to be set up manually. For each customer, there are several options available to set.

- **Number to Call:** This is a drop-down menu with a list of phone numbers for that customer from your MYOB file, which can be used to set which number will be dialled for the automatic reminder. If the customer has no numbers in your MYOB file you will need to update it with at least one before you can set up a reminder call for them.
- **Frequency:** The frequency of how often the customer will be called – daily, weekly, monthly, a



set interval of days, or never. By default this is set to never. If set to interval, the first call made will occur from however many days you set from the present day.

- **Time to Call:** The time of day, in twenty-four hour time, which the customer will be called at. By default this is set to 9 AM. Due to the number of calls a line can support, depending upon the number of customers who have to be called at the same time, they may not all be called at precisely the time set.
- **On:** Which day the customer will be called on. For frequencies of weekly and monthly, the day of week and date respectively will need to be selected from the drop-down menu. For an interval period, the number of days as a whole numeric number will need to be put into the box. This can be left blank for frequencies of never and daily.
- **Call on Weekends:** Whether or not weekends should be ignored. Ticking this means that calls will go through on Saturdays and Sundays.

After your desired options have been set, you can press Submit to set up the automated call for that customer. Every time the appropriate time is met, the customer will receive a call reminding them of their overdue invoice. You can set the details of what the call will say with an IVR (see Call Settings).

Once a customer no longer has an overdue invoice, automated calls for them will stop occurring, but if you wish to stop recurring calls for them prior to them paying their overdue bills, simply set the frequency of calls for that user to never.

If you wish to apply the same overdue call setting to all customers at the same time, there is a section at the bottom of the screen for doing so. Note that if this is used, the first number set for each number will be used as the number to call, so if you need the call to go to a different number, you will have to set it manually.

## Call Settings

### Incoming Call Settings

Feature	Description		
Insert New Clients	Set whether or not a client will be added automatically to your MYOB file when they call if they are not in it already.	No ▾	Change

### Overdue Call Settings

Feature	Description			
Overdue Call	Change the the IVR an overdue call goes to.	GoToIVR ▾	TestOverdue ▾	Change

### Pay by Phone

Description	Account
Choose which account payments are made to via "Pay by Phone".	--- ▾ <span>Change</span>



The Call Settings page allows you to set certain miscellaneous features.

- **Incoming Call Settings:** This will allow you to set whether or not a client will be automatically added to your MYOB file when they dial in if they are not already in it. Note that clients will be added with the bare minimum of information, as there is no way to establish information about a client using just their phone number. If this is selected, there is also no way to distinguish between clients and non-clients calling an extension.
- **Overdue Call Settings:** This will allow you to set what happens when a customer receives an automated call reminding them of their overdue bills. The default option will call the client play a message explaining what the call is, and then read through the details of each of their overdue bills. It is recommended that you set overdue calls to go to an IVR.
- **Pay by Phone:** This will allow you to choose the account payments go to for phone payments using Secure Pay. This is compulsory for using Secure Pay as a feature.

## Charging Clients

### Client List

Billing clients for their calls can only be done whilst logged into SmartPABX on an extension. In order to find unbilled clients, click on the Time Billing section of the navigation bar. This will present you with a list of clients who haven't been billed for their calls.

### Unbilled Clients

Surname	First name	Company	Number #1	Number #2	Number #3
Surname	John		<u>0411111111</u>		
Test	Timothy		<u>0422222222</u>		

### Bill All

Activity

---

▼

Generate Invoice

If the same time billing activity can be used for all unbilled calls, select it from the drop-down list at the bottom of the page and press Generate Invoice. This will generate an invoice for each unbilled call for each client, and put it those invoices through to the MYOB file.

If each client needs to be billed separately due to different calling rates, click on their name or the company name to be taken to a separate page for the billing.



## Billing Individually

### Billing Form

Surname	First name	Company	Number #1	Number #2	Number #3
Surname	John		0411111111		

Date	Minutes	Activity	Rate	Amount	Tax		
2016-04-04	30	---				Generate Invoice	Ignore
2016-04-04	0.067	---				Generate Invoice	Ignore
2016-04-04	0.3	---				Generate Invoice	Ignore
2016-04-04	0.033	---				Generate Invoice	Ignore

### Bill All

Activity
<div>---</div> <div>Generate Invoice</div>

Upon clicking on a client's name and being taken to a new page, you will be given a list of their unbilled calls, with the date it occurred and how many they minutes the call lasted being displayed. In order to charge for a specific call, select an activity from the drop-down box, wait for the amount to be calculated, and then press the Generate Invoice button. The rate, amount, and tax code are all calculated automatically by the SmartPABX and cannot be manually changed.

If there is a specific call which doesn't need to be charged for, press the Ignore button adjacent to that call.

If all unbilled calls can have the same activity applied to them for this client, simply select an activity from the drop-down list at the bottom, and press Generate Invoice.

After the necessary invoices have been generated, it is assumed that someone working with MYOB will fill out any additional details before sending the invoice to the client.

## Client Account IVRs

### Integration

As another MYOB feature for your SmartPABX, you have the option of setting up IVRs to allow customers to check details of their account. If you need assistance setting up IVRs, see Configure IVR, as this section focuses solely on the MYOB integration.

When adding an IVR, if you have MYOB enabled as a feature on your SmartPABX, you will see several additional options in an IVR action list.



Priority:	Action:	Value:
1	Answer	N/A
2	Take Credit Card Payment	N/A
3		

Number options for IVR TakePayment:

Option Number:	Action:	Value:
	Answer	
	Ringing	
	Play	
	Wait	
	WaitExten	
	Dial	
	GotoVoicemail	
	GotoDirectory	
	GotoIVR	
	GotoQueue	
	Hangup	
	Read Text	
	MYOB Customer Account	
	MYOB Customer Details	
	MYOB Overdue Invoices	
	Take Credit Card Payment	

new option number: 1 Go

[Return to IVR Configuration](#)

MYOB Customer Account will, when reached on the IVR list, read the caller's phone number, look them up in the database to see whether or not they exist, and if they do, find their MYOB account details, then read out the total amount of money they currently have to pay to the user.

When MYOB Customer Details is reached on the IVR list, it will look up the caller's phone number in the database, and if they exist, it will go through all of their unpaid invoices. For each one, it will read aloud the amount they owe for that invoice and say when it must be paid by.

MYOB Overdue Invoices will look up all of the overdue invoices the caller has, and read out their details one-by-one.

Take Credit Card payment will allow callers to input a credit card and the details associated with it to the phone, which after being confirmed by Secure Pay, will make a payment and mark that invoice as being paid. Making a payment by credit card will automatically use the oldest invoice for that client for payment.

Note that if a caller is dialling from a phone which has not been billed or is not in the database, then the system will be unable to find them. They need to call from the same phone as they previously have.

An IVR showing an example of how to allow customers to access each feature by pressing different buttons on their phone is shown below.



Priority	Action	Value	
1	Ringing	N/A	Save
2	Answer	N/A	Save
3	Play	instructions.wav	Save
4	WaitExten	30 secs	Save
5	Hangup	N/A	Save Delete
6	Answer		Save <input type="checkbox"/>

#### Editing IVR number options for IVR DIDExtension:

Option Number	Priority	Action	Value	
1	1	MYOB Customer Account	N/A	Save
1	2	GotoIVR	DIDExtension	Save Delete
2	1	MYOB Customer Details	N/A	Save
2	2	GotoIVR	DIDExtension	Save Delete
3	1	Take Credit Card Payment	N/A	Save
3	2	GotoIVR	DIDExtension	Save Delete
4	1	MYOB Overdue Invoices	N/A	Save
4	2	GotoIVR	DIDExtension	Save Delete

## Pay by Phone


MYOB users are able to pay their oldest overdue invoice via a phone call. With this feature you can setup a DID to go to an IVR that holds the "Take Credit Card Payment" option. The below instructions will guide you on how to achieve this.

### Setup

Firstly, you must have a **Secure Pay** account to utilize this feature. If you do not have a Secure Pay account, you may register one at <https://www.securepay.com.au/>.

Once you have setup your Secure Pay account, you can enter your Secure Pay **Merchant ID** and **Password** into the Phone Payment Setup page.

### Phone Payment Setup



Set up your "Secure Pay" Phone Payments

➔

### Secure Pay

Merchant ID:

Password:

Secondly, you must select a MYOB account for payments to go to. To do this, navigate to MYOB Features from the dashboard and then to Call Settings.





Here you will be presented with a section called "Pay by Phone". Underneath this you will see a dropdown menu to select one of your MYOB accounts. Whichever account that is selected here will be where phone payments will be made.

### Pay by Phone

Description	Account
Choose which account payments are made to via "Pay by Phone".	<div><div>---</div><div>▼</div></div> <div>Change</div>



# Xero Integration

## Introduction

Compatibility with the Xero accounting software has been added to SmartPABX. This section will detail how to use your PABX to automatically record incoming call details from clients and generate invoices for those clients using Xero. In order to use this feature, you will need a login for your Xero account and an organisation you wish to connect to.

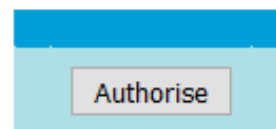
## Setting Up

In order to access a Xero organisation, you will need to start off by clicking on the Xero module in your SmartPABX. This will give you a button which will allow you to securely log into your Xero account. Once you have logged into your account, select the organisation you wish to use with your SmartPABX and press the authorise button. This will then return you to the PABX. After this, you will be able to access your Xero features.

[Home](#) | [Features](#) | [Contact Sync](#) | [Overdue Customers](#) | [Call Settings](#)

### Welcome to Xero!

To authorise your Smart PABX to have access to your Xero account please click the following button:






## Features

[Home](#) | [Features](#) | [Contact Sync](#) | [Overdue Customers](#) | [Call Settings](#)

### Welcome!

Navigate through the links below to sync your Xero details with your Smart PABX or edit your settings.

**Return to admin console.**

<p>Contact Sync</p>  <p>Set all of the contacts from your Xero file to your Smart PABX</p>	<p>Overdue Customers</p>  <p>Set up automated calls to customers overdue on their invoices</p>	<p>Call Settings</p>  <p>Change your settings on Xero-related calls</p>
---	---	--

**Contact Sync** In order to get a list of all of your contacts from Xero into your SmartPABX, click on the



Contact Sync module, and then on the Sync Contacts button. This will look through all of your contacts in Xero and add them into the SmartPABX. Once this has been done, you will be able to see incoming clients' names on your handsets as they call you, and be able to bill them for the duration of calls. New clients will be added to your SmartPABX automatically from Xero. **Overdue Customers** This section will allow you to look up all clients in your Xero contact list who have an overdue balance and assign automated calls to them. For each client who you wish to have called automatically, select the frequency of when the calls are to be, choose the number to be called, and press Submit.

### Overdue Customers

Name	Number to Call	Overdue	Frequency	Time to Call	On	Call on Weekends	
Macdonnell Spring and Associates	0800123456	\$20	Never	9:00	Select When...	<input type="checkbox"/>	Submit
Rex Media Group	0333144133	\$20	Never	9:00	Select When...	<input type="checkbox"/>	Submit
Marine Systems		\$396	Never	9:00	Select When...	<input type="checkbox"/>	Submit
Cube Land	033981894	\$495	Never	9:00	Select When...	<input type="checkbox"/>	Submit
Ridgeway University		\$6187.50	Never	9:00	Select When...	<input type="checkbox"/>	Submit
DISR - Small Business Services	08004389376	\$3850	Never	9:00	Select When...	<input type="checkbox"/>	Submit
City Limousines	0330330003	\$16930	Never	9:00	Select When...	<input type="checkbox"/>	Submit

### Apply To All

Frequency	Time to Call	On	Call on Weekends	
Never	9:00	Select When...	<input type="checkbox"/>	Submit

By default, customers are set not to receive reminder calls when they are overdue on an invoice; the calls need to be set up manually. For each customer, there are several options available to set.

- **Number to Call:** This is a drop-down menu with a list of phone numbers for that customer from your Xero organisation, which can be used to set which number will be dialled for the automatic reminder. If the customer has no numbers in your Xero organisation you will need to update it with at least one before you can set up a reminder call for them.
- **Frequency:** The frequency of how often the customer will be called – daily, weekly, monthly, a set interval of days, or never. By default this is set to never. If set to interval, the first call made will occur from however many days you set from the present day.
- **Time to Call:** The time of day, in twenty-four hour time, which the customer will be called at. By default this is set to 9 AM. Due to the number of calls a line can support, depending upon the number of customers who have to be called at the same time, they may not all be called at precisely the time set.
- **On:** Which day the customer will be called on. For frequencies of weekly and monthly, the day of week and date respectively will need to be selected from the drop-down menu. For an interval period, the number of days as a whole numeric number will need to be put into the box. This can be left blank for frequencies of never and daily.
- **Call on Weekends:** Whether or not weekends should be ignored. Ticking this means that calls will go through on Saturdays and Sundays.

After your desired options have been set, you can press Submit to set up the automated call for that customer. Every time the appropriate time is met, the customer will receive a call reminding them of their overdue invoice. You can set the details of what the call will say with an IVR (see Call Settings).



Once a customer no longer has an overdue invoice, automated calls for them will stop occurring, but if you wish to stop recurring calls for them prior to them paying their overdue bills, simply set the frequency of calls for that user to never.

If you wish to apply the same overdue call setting to all customers at the same time, there is a section at the bottom of the screen for doing so. Note that if this is used, the first number set for each number will be used as the number to call, so if you need the call to go to a different number, you will have to set it manually.

**Call Settings** The call settings page allows you to set certain miscellaneous features

- **Overdue Call Settings:** This will allow you to set what happens when a customer receives an automated call reminding them of their overdue bills. The default option will call the client play a message explaining what the call is, and then read through the details of each of their overdue bills. It is recommended that you set overdue calls to go to an IVR.
- **Pay by Phone:** This will allow you to choose the account payments go to for phone payments using Secure Pay. This is compulsory for using Secure Pay as a feature.

[Home](#) | [Features](#) | [Contact Sync](#) | [Overdue Customers](#) | [Call Settings](#)

### Overdue Call Settings

Feature	Description		
Overdue Call	Change the the IVR an overdue call goes to.	Default ▾	<input type="text"/> <input type="button" value="Change"/>

### Pay by Phone

Description	Account	
Choose which account payments are made to via "Pay by Phone".	Business Bank Account ▾	<input type="button" value="Change"/>

## Charging Clients

**Client List** Billing clients for their calls can only be done whilst logged into SmartPABX on an extension. In order to find unbilled clients, click on the Time Billing section of the navigation bar. This will present you with a list of clients who haven't been billed for their calls.

### Unbilled Clients

Surname	First name	Company	Number #1	Number #2	Number #3
		Macdonnell Spring and Associates	0800123456	0444123123	
		Rex Media Group	0333144133		
Limousines	City		0330330003	0455559921	0000000000

### Bill All

Rate Per Hour	Due Date	Account	Tax Rate	
\$ <input type="text"/>	<input type="text"/>	Sales ▾	BAS Excluded ▾	<input type="button" value="Generate Invoices"/>

If the same time billing activity can be used for all unbilled calls, select it from the drop-down list at



the bottom of the page and press Generate Invoice. This will generate an invoice for each unbilled call for each client, and put it those invoices through to your Xero organisation.

If each client needs to be billed separately due to different calling rates, click on their name or the company name to be taken to a separate page for the billing. **Billing Individually**

#### Billing Form

Surname	First name	Company	Number #1	Number #2	Number #3
		Macdonnell Spring and Associates	0800123456	0444123123	

#### Incoming Calls

Date	Minutes	Rate per Hour	Due Date	Account	Tax Rate		
2016-07-13	60	\$		Sales	BAS Excluded	Generate Invoice	Ignore

#### Outgoing Calls

Date	Minutes	Rate per Hour	Due Date	Account	Tax Rate		
2016-07-13	60	\$		Sales	BAS Excluded	Generate Invoice	Ignore

#### Bill All

Rate Per Hour	Due Date	Account	Tax Rate	
\$		Sales	BAS Excluded	Generate Invoices

Back

Upon clicking on a client's name and being taken to a new page, you will be given a list of their unbilled calls, with the date it occurred and how many they minutes the call lasted being displayed. In order to charge for a specific call, type in the rate per hour you wish to charge for the call, select a due date for when the invoice is due by, select an Account and Tax Rate for the invoice, and then press the Generate Invoice button.

If there is a specific call which doesn't need to be charged for, press the Ignore button adjacent to that call.

If all unbilled calls can have the same details applied to them for this client, simply type the necessary information into the form at the bottom, and press Generate Invoice. After the necessary invoices have been generated, it is assumed that someone working with Xero will fill out any additional details before sending the invoice to the client.

## Client Account IVRs

**Integration** As another Xero feature for your SmartPABX, you have the option of setting up IVRs to allow customers to check details of their account. If you need assistance setting up IVRs, see Configure IVR, as this section focuses solely on the Xero integration.

When adding an IVR, if you have Xero enabled as a feature on your SmartPABX, you will see several additional options in an IVR action list.



Priority:	Action:	Value:	
1	Answer	N/A	Save
2	Answer		Save <input checked="" type="checkbox"/>

Option Number:

Answer  
Ringing  
Play  
Wait  
WaitExten  
Dial  
GotoVoicemail  
GotoDirectory  
GotoIVR  
GotoQueue  
Hangup  
Read Text  
Xero Customer Account  
Xero Customer Details  
Xero Overdue Invoices  
Take Credit Card Payment

number options for IVR Example:

Priority:	Action:	Value:
1		

new option number: 1 Go

[Return to IVR Configuration](#)

Xero Customer Account will, when reached on the IVR list, read the caller's phone number, look them up in the database to see whether or not they exist, and if they do, find their Xero account details, then read out the total amount of money they currently have to pay to the user.

When Xero Customer Details is reached on the IVR list, it will look up the caller's phone number in the database, and if they exist, it will go through all of their unpaid invoices. For each one, it will read aloud the amount they owe for that invoice and say when it must be paid by. Xero Overdue Invoices will look up all of the overdue invoices the caller has, and read out their details one-by-one.

Take Credit Card payment will allow callers to input a credit card and the details associated with it to the phone, which after being confirmed by Secure Pay, will make a payment and mark that invoice as being paid. Making a payment by credit card will automatically use the oldest invoice for that client for payment.

Note that if a caller is dialling from a phone which has not been billed or is not in the database, then the system will be unable to find them. They need to call from the same phone as they previously have. An IVR showing an example of how to allow customers to access each feature by pressing different buttons on their phone is shown below.



Priority:	Action:	Value:	
1	Ringling	N/A	Save
2	Answer	N/A	Save
3	Play	welcome.wav	Save
4	WaitExten	30 secs	Save
5	Hangup	N/A	Save Delete
6	Answer		Save <input type="checkbox"/>

#### Editing IVR number options for IVR Example:

Option Number:	Priority:	Action:	Value:	
1	1	Xero Customer Account	N/A	Save
1	2	GotoIVR	Example	Save Delete
2	1	Xero Customer Details	N/A	Save
2	2	GotoIVR	Example	Save Delete
3	1	Xero Overdue Invoices	N/A	Save
3	2	GotoIVR	Example	Save Delete
4	1	Take Credit Card Payment	N/A	Save
4	2	GotoIVR	Example	Save Delete

Add new option number:



# Sub Admins

## Overview

The sub admins feature allows for creation of sub administration accounts. These accounts are similar to the default admin account, but can have SmartPABX features turned on or off. The sub admin feature can be accessed via the Sub Admins button on the dashboard after logging in.

## Manage Sub Admins

### Overview

From the Manage Sub Admins page you will see a list of all your sub admin accounts, a button to edit their details, a button to update their permissions, a button to delete the sub admin account and a button to add a new account.

## Manage Sub Admins

Username	Name			
bob	Bob Smith	Edit	Permissions	Delete
				Add

### Add a Sub Admin

To create a new sub admin, click on the 'Add' button listed on the Manage Sub Admins page. From here you will be taken to the creation screen.

A sub admins can have the following details specified (*all fields are required*):

- Username - Needed to login to the account.
- Full Name - A user friendly way to know who the account belongs to.
- Email Address - Used for password recovery. Must be a valid email address.
- Password - Needed to login to the account. Must be 5 character or more in length.





## Create Sub Admin

A screenshot of the 'Create Sub Admin' form. It has a light blue background and a darker blue header. The form contains four input fields: 'Username' with the value 'bob', 'Full Name' with the value 'Bob Smith', 'Email Address' with the value 'bobby@email.com', and 'Password' with masked characters '.....'. Each field has a small icon to its right. Below the fields is a button labeled 'Create Sub Admin'.

## Update a Sub Admins Details

After creation, a sub admin's details can be updated by clicking the 'Edit' button on the Manage Sub Admins page. From here you will be displayed with a form with the user's current details. Pressing the 'Update' button below the form will save any changes made.

## Update Sub Admin

A screenshot of the 'Update Sub Admin' form. It has a light blue background and a darker blue header. The form contains three input fields: 'Username' with the value 'bob', 'Full Name' with the value 'Bob Smith', and 'Email Address' with the value 'bobby@email.com'. Each field has a small icon to its right. Below the fields is a button labeled 'Update'. At the bottom of the form is a button labeled 'Reset Password'.

## Reset Password

Passwords can be reset for sub admin accounts from the Update/Edit page. Clicking the 'Reset Password' button will prompt you with a confirmation message. After pressing OK, an email will be sent to the accounts associated email address with a link to reset their password manually.



## Update Sub Admin

Username: bob

Full Name: Bob Smith

Email Address: bobby@email.com

Update

Reset Password

## Permissions

The main reason to have sub admins accounts is to restrict what access they have to the SmartPABX interface. By pressing the 'Permissions' button on the Manage Sub Admins page, you will be presented with a list of groups and the access level the associated account has to those groups (on or off).

## Permissions - Group/Feature Association

Each related feature can be found within this manual

Permission Groups	Related Feature
admin_accounting	Accounting (MYOB or Xero)
admin_acl	Access Control
admin_backupConfig	Backup & Restore
admin_campaign	Campaign
admin_cdrs	Call Records/Recordings
admin_cdr_recording	Call Records/Recordings – specifically the 'Recording' column in the search results.
admin_conf	Conferences
admin_dids	Direct Indials
admin_ext	Extensions
admin_extensionconsole	Extension Console
admin_fax	Faxes
admin_guestextensions	Guest Extensions
admin_ivrs	IVRs
admin_listen	Listen Groups
admin_miscvmail	Miscellaneous Mailboxes
admin_moh	Music on Hold
admin_park	Call Parking
admin_paybyphone	Phone Payment Setup
admin_queues	Queues
admin_queuestats	Queue Stats
admin_reminder	Reminder Calls
admin_report	Reports
admin_ring	Ring Groups
admin_scheduler	DID Scheduler
admin_sounds	System Sounds
admin_sub_admins	Sub Admins

This list is likely to change when new features are added



# Active Directory LDAP

## Introduction

This section of your PABX can be used to automatically sync users' details from Active Directory to your PABX. In order to sync the details, you will need to set up an LDAP connection beforehand. To access this section, click on the LDAP Settings button on the main page of your PABX.

## LDAP Settings

Option	Value
Description	<input type="text"/>
Host*	<input type="text"/>
Port*	<input type="text"/>
Alt Host	<input type="text"/>
Alt Port	<input type="text"/>
Domain*	<input type="text"/>
Username*	<input type="text"/>
Password*	<input type="password"/>
Timeout	<input type="text"/> second(s)
Automatically Sync	<input type="checkbox"/>

Update Test Connection

Mappings Manual Sync

When you initially access your LDAP Settings section, you will be presented with the above form. This form can be used to set up your connection to Active Directory. The fields refer to the following:

- **Description:** An optional description for this connection
- **Host:** The host address of the Active Directory instance you are connecting to. This should be an IP Address.
- **Port:** The port to connect via. By default this is set to 389.
- **Alt Host:** An alternative host address to connect to if the initial one fails.
- **Alt Port:** An alternate port to connect via if the initial one fails.
- **Domain:** The domain of your Active Directory. This should be a name, such as examplehost.local.
- **Username:** The username of the account to log into Active Directory with.
- **Password:** The password for the account that is connecting.
- **Timeout:** The optional time in seconds to try connecting before failing. If left blank or set to zero the timeout will be unlimited.
- **Automatically Sync:** If checked, Active Directory's details will be synced with your PABX's once every hour.

Of the fields, the Host, Port, Domain, Username, and Password ones must be filled out before a connection can be set up. Once you've filled out the necessary fields, pressing Update or Test Connection will save your settings. If Test Connection has been pressed, your PABX will also attempt



to connect to Active Directory to ensure that it will be able to sync correctly, and display any errors if it cannot.

## Mappings

Field Mapping ?

PABX Field	Active Directory Field
Extension Field Custom Active Directory Field	IP Phone <input type="text"/>
Extension Comment Custom Active Directory Field	N/A <input type="text"/>
Outbound DID Display Custom Active Directory Field	N/A <input type="text"/>
Web Password Custom Active Directory Field	N/A <input type="text"/>
Voicemail Email Custom Active Directory Field	N/A <input type="text"/>
Voicemail PIN Custom Active Directory Field	N/A <input type="text"/>
Personal PIN Custom Active Directory Field	N/A <input type="text"/>
Forward calls to Custom Active Directory Field	N/A <input type="text"/>
DID Redirect	<input type="checkbox"/>
Update	

By pressing the *Mappings* button at the bottom of the *LDAP Settings* page, you will be taken to a page where you can set which fields from Active Directory will be synced to a corresponding PABX field.

- **Extension Field:** This is the field in Active Directory which will be compared to each extension. If the value of that field for a user in Active Directory matches an extension number, that extension will be updated with that Active Directory user's details. By default this is set to IP Phone.
- **Extension Comment:** The comment set against an extension.
- **Outbound DID Display:** The value to be set for that user's caller ID on outgoing calls. Note that if this value in Active Directory is not a DID that exists in your PABX, the Outbound Caller ID field in the PABX for the corresponding extension will not display the value, although it will still be set correctly.
- **Web Password:** The password for the extension to log into the PABX's web interface.
- **Voicemail Email:** The email for the extension to receive voicemails. If either this or the Voicemail PIN fields are set, then voicemail will be set to be enabled for that user's extension.
- **Voicemail PIN:** The PIN to be used by this user to access their voicemail.
- **Personal PIN:** The Personal PIN to be used by this user.
- **Forward calls to:** The number for calls to be forwarded to for this number.
- **DID Redirect:** If this is checked, then if the Telephone field for a user in Active Directory matches a DID in your PABX, that DID's action will be set to GotoExtension and the value will match the extension's number.

If the Active Directory Field value is set to Other telephone number, Other web page, Other home, Other pager, Other mobile, Other fax, or Other IP Phone and the corresponding Active Directory field has multiple values in it, the value used for the PABX will be the first value for that Active Directory's corresponding field.



Aside from the already existing fields in Active Directory, you can also define custom fields that you have previously created in Active Directory for each field to be mapped. To do this, type in the name of the field (the attribute name, **not** the display name) to the Custom Active Directory Field field below the PABX field you wish to apply the custom field to.

If you do not wish for a particular PABX field to be synced with Active Directory, simply leave that option as N/A and that field won't be changed.

## Syncing

To sync details from Active Directory to your PABX, you can check the *Automatically Sync* option on the *LDAP Settings* page. If this option is set, the PABX will sync with Active Directory once each hour. Alternatively, if you press the *Manual Sync* button, the PABX will do a sync immediately.



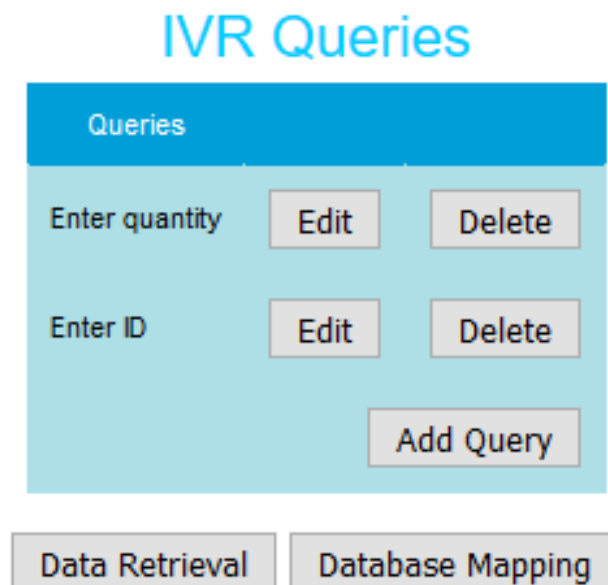
# IVR Queries

## Introduction

The IVR Queries section of your PABX can be used to set up options for your clients and customers to answer over the phone. This is similar to the *Campaign* section, but unlike the campaign section, answers here do not need to be pre-defined, and after the data has been created, it can be sent to your Microsoft SQL Server or email address.

## Setting Up

To begin setting up queries for people to answer over the phone, begin by going to the IVR Queries section of your PABX. Here, you will see the option to add queries, set up data retrieval, and map IVR queries to your Microsoft SQL Server.



## Adding Queries

To add a query, press the Add Query button. This will take you to a simple form. This form has the following fields:

- **Description:** A description for the query
- **Audio** file: The audio of the question being asked. Note that once a client has finished typing in their answer to their phone, they will need to press the hash key to complete their entry, so this prompt should also be included in the audio file.
- **Customer Confirm:** If this is checked, then after a user has typed in their answer to the query, it will be read back to them for confirmation. If they have entered it incorrectly they can press 1 to re-enter the number, or 2 to continue to the next IVR option.
- **Queue Redirect:** When answering a query, a user has the option to immediately direct to a queue by pressing the asterisk (\*) button on their phone, followed by the hash key. This is useful for if a user cannot continue in an IVR because their ID cannot be found in the database (see below) and they wish to speak to someone in a queue about this. In order to set the queue



which the query the user is answering will redirect to, choose a queue from the list presented here.

- **Database Check:** If this is checked, then when a user inputs their answer, it can be checked against a database to see whether it exists. This is useful for if you want something such as a user ID to be entered and want to ensure that it exists before the user inputs it. If you check this box it is assumed that you already have a working connection to Microsoft SQL Server (see the Data Retrieval section below).
- **Table Name:** If you have selected the Database Check option, you will need to enter the table name where the data is to be looked up.
- **Column Name:** If you have selected the Database Check option, you will need to enter the column name in the above table where the data is to be looked up.
- **Database Audio File:** If the input a user puts in cannot be found in a table, you can set your own audio file to be played to the user to inform them that their entry could not be found and that they need to try again. If you leave this blank, an automated message will be played.

As an example for the database check, if you have users stored in a table called *users* and the column used for identifying them is *user\_id*, you would put *users* into the Table Name field and *user\_id* into the Column Name field. When the user inputs their ID, it will look up all *user\_id* values in the *users* table where the *user\_id* value is equal to the input value. If it finds at least one value, then the answer will be saved and the IVR will continue.

**New Query**

Option	Value
Description	<input type="text"/>
Audio file	Select... <span>▼</span>
Customer Confirm	<input type="checkbox"/>
Queue Redirect	N/A <span>▼</span>
Database Check	<input checked="" type="checkbox"/>
Table Name	<input type="text"/>
Column Name	<input type="text"/>
Database Audio File	N/A <span>▼</span>

Once you have added a description to the question and selected a file, press the *Add* button to add this query to your PABX. If you need to change any details of a query later, you can simply press the *Edit* button for that query in the list of queries, which will take you to a form where you can change them. If you wish to delete a query, simply press the delete button for that query in the list of overall queries.

## Adding Pre-Defined Answers

In addition to queries in which a user enters their answer dynamically, you can also set your own answers in IVRs. This is useful for showing when a user has selected a particular option in the IVR that does not require a prompt or which requires action at the same time that they select their choice. In



order to add your own pre-defined answer, press the *Add Answer* button in the IVR Queries section. This will take you to a form for creating your own answers. This form has the following fields:

### New Answer

Option	Value
Description	<input type="text"/>
Field	<input type="text"/>
Answer	<input type="text"/>

- **Description:** A description of the answer
- **Field:** If you intend for this value to be inserted into a database, this will be the field this value will apply to. (The table the field is part of is assumed to be the same as the table associated with the IVR in which you will be using this pre-defined value - see below for associating IVRs with tables). If you intend on retrieving data via email, it is suggested you make this a uniquely identifiable value for association with this answer
- **Answer:** The answer to either be inserted into your database or displayed in an email.

### Adding Queries to an IVR

To add a query to an IVR, simply choose the *Query* option in the Action list, and then select the relevant query. When a user reaches the relevant option in your IVR, they will hear the audio file you have assigned to that query and be prompted to type in their answer using the dialpad. For obvious reasons, it is assumed that any queries you wish to make accept only numerical answers. Once they have typed in their answer followed by the hash key, they will move to the next option in the IVR. If a user does not enter something within ten seconds, they will be prompted again. If after ten prompts they have not entered a value, the IVR will move onto the next option.

Below is a simple example of an IVR which asks users to input their customer ID, prompt users to enter the quantity of an item that they want, and then hang up.





Priority:	Action:	Value:	
1 ▾	Answer ▾	N/A	Save
2 ▾	Query ▾	Enter ID ▾	Save
3 ▾	Query ▾	Enter quantity ▾	Save
4 ▾	Hangup ▾	N/A	Save Delete
5	Answer ▾		Save <input type="checkbox"/>

If you intend to redirect a user to a queue, extension, or other human-controlled endpoint, you can use the *Append Caller ID* IVR option to inform the person at the endpoint of one or more values the user has entered to help prepare them and make things faster for the user. In order to do this, select the *Append Caller ID* IVR option and a query which was previously asked in the IVR using the *Query* option. This will add whatever the user entered for that query to the caller ID displayed on a handset when the call is redirected. If you wish to add more entered query values to the caller ID you simply need to choose the *Append Caller ID* option after a user has entered the value you wish to add. Each value will be displayed after a hyphen and a space. The format of the caller ID is [IVR Name] - [Append Caller ID Value #1] - [Append Caller ID Value #2] -... for as many times as the *Append Caller ID* option has been applied in the IVR.

To demonstrate, if a user enters their ID using the value *Enter Cust ID* for the *Query* option and you wish to display this to someone whom is having this call redirected to them, simply select *Append Caller ID* and choose *Enter Cust ID* from the drop-down list of queries. When this call is redirected to the person who is receiving the call, they will see the caller ID as [IVR Name] - [Entered Customer ID].

In order to use a pre-defined answer in an IVR, simply select the *Query Answer* option, and the relevant answer you have previously defined. If you are adding your data to a database, then upon the data for this IVR being added to your database, the pre-defined answer you have added here will be added into its corresponding field for the record which other values in this IVR are part of. If you are receiving your data via email, it will simply be stated that this value was chosen by the user upon receiving the other relevant information from this IVR.

## Data Retrieval

### Emails

In order to retrieve data entered via IVR queries via email, go to the *Data Retrieval* section of the IVR Queries section. This will present you with a form, from which you can select either Email or MS SQL. Select Email, enter your email address into the *Email Address* field, and press the *Update* button. Provided the email address you have entered is correct, whenever a customer finishes a call which had them using one or more IVRs which contained the *Query* option, you will receive an email saying which questions were answered and what they entered for them.



## Data Retrieval

Option	Value
Retrieval Type	Email ▾
Email Address	example@email.com

Update

### Microsoft SQL Server

The alternative way to retrieve data is to have it inserted directly into your Microsoft SQL Server. If you are using this method it is assumed that your Microsoft SQL Server is directly accessible from your SmartPABX.

To begin setting up your data connection to Microsoft SQL Server, you will need to go to the *Data Retrieval* section of the IVR Queries section, and select MS SQL as the Retrieval Type. This will present you with a form with the following values:

- **Server host:** The host on which your Microsoft SQL Server is located. This is likely to be an IP Address.
- **Username:** The username to log into the database with. It is assumed that you are using an SQL Server Authentication login for this, and that this user has access to write to whichever tables you intend to use this feature with.
- **Password:** The password to be used when logging in with the above username.
- **Port:** The port your Microsoft SQL Server is listening for incoming requests on. If you are not sure of this value, you can find it in SQL Server Configuration Manager under the SQL Server Network Configuration section.
- **Database name:** The name of the database containing the tables you intend to insert data into.

Once you have filled out all of this information, press the *Update* or *Test Connection* button to save your settings. If you press the *Test Connection* button then in addition to saving your values it will also do a check to see whether it can connect to your Microsoft SQL Server. If all of your details are correct upon pressing *Test Connection* but you are receiving an error, then it is likely that your Microsoft SQL Server is not accessible from your SmartPABX and thus you cannot use Microsoft SQL



### Data Retrieval

Option	Value
Retrieval Type	MS SQL ▾
Server host	192.168.200.200
Username	example
Password	••••••••
Port	1433
Database Name	test_db

Server as a method for data retrieval. Once you have completed your initial settings for connecting to your Microsoft SQL Server, you will need to set up details for which fields in which tables will have data inserted into them. To begin, return to the main *IVR Queries* page and press the *Database Mapping* button. This will take you to a new page.

You will be presented with a form which allows you to set a corresponding field for each IVR query you have previously set up. The value you enter is the name of the field which this data will be inserted into (for the tables which contain these fields, see below). For example, let's say you have a query with the description *Enter Customer ID*, which prompts users to enter their customer ID and reads the value entered. If you had a table (or tables) with a field named *customer\_id*, where you intend to store this data, then for *Enter Customer ID*'s database field, you would enter *customer\_id*.

If you have a query which you intend to use for a recurring field over multiple tables, then you will need to ensure that those fields are all named the same in each table. If those fields do not have the same name, then you will need to create separate queries for each unique field name, so that you can specify the field name for each query.



## Field Mapping

For each query you have, type in the name of the corresponding field in your database where the answer to that query is to be inserted. Please ensure that each field name matches the one from your database exactly.

Query	Database Field
Enter quantity	<input type="text" value="quantity"/>
Enter ID	<input type="text" value="customer_id"/>

For specifying the tables which you will insert data into, there is a form below the field mapping section for mapping IVRs to tables. A list is presented here of each IVR which currently has at least one Query option in it. Due to the nature of the database inserts to be done, it is assumed that each IVR will be used for inserting into only one table.

For each IVR listed, type in the name of the table which data will be inserted into. When a call to an IVR with queries has completed, for each query in that IVR, it will attempt to insert the entered answer for that query into the corresponding field set up in the field mapping section for the table this

## IVR Query Mapping

For each IVR you are using with the Query option, enter a corresponding table name. This is the name of the table which will have data inserted into it for this IVR.

Query	Table Name
Collection_IVR	<input type="text" value="[dbo].[collection]"/>
Order_IVR	<input type="text" value="[dbo].[order]"/>
Invoice_IVR	<input type="text" value="[dbo].[invoice]"/>

IVR uses.

## Database Insertion Example

To illustrate how database insertion works, let us assume you have a simple table in your database called `[dbo].[order]` with the following fields, of which `id` is the Primary Key and an autoincrementing value:



**id    customer\_id    quantity**  
 int(11)    int(11)    int(11)

Let's say that you wish for users to be able to enter an IVR, type in their customer ID and the quantity of a pre-defined item you stock, and have it automatically entered into this table. After recording the appropriate sound files and creating queries, your IVR would be set up like so:

Priority:	Action:	Value:	
1 ▾	Answer ▾	N/A	Save
2 ▾	Query ▾	Enter ID ▾	Save
3 ▾	Query ▾	Enter quantity ▾	Save
4 ▾	Hangup ▾	N/A	Save Delete
5	Answer ▾		Save <input type="checkbox"/>

You would then have to set up the corresponding fields for those queries, like so:

### Field Mapping

For each query you have, type in the name of the corresponding field in your database where the answer to that query is to be inserted. Please ensure that each field name matches the one from your database exactly.

Query	Database Field
Enter quantity	quantity
Enter ID	customer_id

Update

Finally, you would need to set which table this IVR inserts data into. Assuming that the IVR is named Order\_IVR, you would enter the name of the table for this IVR, which would be [dbo].[order].



## IVR Query Mapping

For each IVR you are using with the Query option, enter a corresponding table name.  
This is the name of the table which will have data inserted into it for this IVR.

Query	Table Name
Order_IVR	<input type="text" value="[dbo].[order]"/>

Update

Whenever this IVR is completed and a user has entered all of the necessary data, it will insert into the table [dbo].[order] the values entered for each query. For each answer, it will look up that answer's query's corresponding database field, which is assumed to be an existing field in the table specified for this IVR.

If you wish to insert data into multiple tables whilst still within the same call, you will need to set up a separate IVR for each table you wish data to be inserted into, and use the GotoIVR option within each IVR to redirect to the next necessary IVR. As each IVR will only insert data into your database for the answers to the queries contained within that IVR, you may need to use a query in one IVR which has already been used in a previous one in that call – for example, reading a customer's ID.

If your database connection is set up correctly but you are not receiving data to your tables, it is likely that you have entered your table or field names incorrectly. If this is the case, run a simple SQL query in Microsoft SQL Server to check the exact format of your table names and database.



# AMI Users

## Introduction

It is possible to add users to your PABX for the Asterisk Manager Interface, which will allow you to remotely send commands to your PABX if you are familiar with Asterisk. This can be set up in the AMI section of your PABX.

## Creating and Managing AMI Users

In order to add an AMI user, head to the AMI section of your PABX, and press the *Add User* button.

**New AMI User**

Option	Value
Permitted IP Addresses	<input type="text"/>
Read Permissions	<input type="checkbox"/> System
	<input type="checkbox"/> Call
	<input type="checkbox"/> Log
	<input type="checkbox"/> Verbose
	<input type="checkbox"/> Command
	<input type="checkbox"/> Agent
	<input type="checkbox"/> User
<input type="checkbox"/> All	
Write Permissions	<input type="checkbox"/> System
	<input type="checkbox"/> Call
	<input type="checkbox"/> Log
	<input type="checkbox"/> Verbose
	<input type="checkbox"/> Command
	<input type="checkbox"/> Agent
	<input type="checkbox"/> User
<input type="checkbox"/> All	

This will take you to a new form for adding a user. The following fields need to be filled out:

The following

- **Permitted IP Addresses:** Any IP addresses which are allowed to log in as this user, including the subnet mask. If you wish for multiple IP addresses to be used for this user, you may separate the entries by using commas. For example, *192.168.1.0/255.255.255.0,192.168.2.0/255.255.255.0*.
- **Read Permissions:** The permissions for what this user can read in Asterisk. Each permission manages the following:
  - **System:** General information including commands such as Shutdown, Restart, and Reload.
  - **Call:** Information about channels and ability to set information in a running channel.
  - **Log:** Read-only logging information.
  - **Verbose:** Read-only verbose information.
  - **Command:** Permission to run CLI commands.
  - **Agent:** Information about queues and agents and ability to add queue members to a queue.
  - **User:** Permission to send and receive UserEvent
  - **All:** All of the classes above
- **Write Permissions:** As above



After you have filled out the necessary information for this user, press the *Add* button to add them. A randomly generated username and password will be created for this user. For security reasons, neither of these can be changed.

To edit a user, on the main page for viewing AMI users, press the *Edit* button by a user's name. From here, you can change whatever details you want and then press the *Update* button to save those changes.

To delete a user, on the main page for viewing AMI users, press the *Delete* button by a user's name. After confirming that you wish to delete this user, they will be removed.





# API

## Overview

The SmartPABX also comes with its own API. It can only be accessed if the API feature is enabled on your SmartPABX. Using the API gives you the ability to interact and update information from an external source.

For full documentation on how to use the API, please refer to <http://XXXX.voippabx.com.au/api/v1/>, where 'XXXX' is your SmartPABX's name.

## API Users

To be able to access the API, a unique user must be created to authenticate with. Clicking the 'Add API User' button will present you with a screen to fill in a new users details.

### **Username**

- Used to authenticate a user (along with their password)

### **Password**

- Used to authenticate a user (along with their username)

### **Restrict to IP Address**

- You may add up to 2 IP addresses that you would like to restrict API request to from a particular user. If a request is made to the API from a foreign IP address, the request is rejected. These fields may be left empty if you do not want to restrict access to certain IP addresses.



# Dropbox

## Introduction

If you wish, you may enable your SmartPABX to automatically upload recordings to your Dropbox account each night. In order to do this, go to the Dropbox section of your SmartPABX. You will be presented with a button to securely log into your Dropbox account.

### Dropbox Integration

To authorise your Dropbox account to receive recording files each night, please click the button below. It will redirect you to Dropbox. After you have successfully authorised yourself with Dropbox, you will be redirected back here. Once this has been done, your recordings will be uploaded to Dropbox each night provided you have sufficient space on your Dropbox.

Dropbox Authorisation

Once you have logged in and given permission for the SmartPABX File Syncer to access your Dropbox, you will be returned to your SmartPABX. You should now have a set of different options, as well as information about your Dropbox.

If you wish to use a separate Dropbox account for uploading files to other than the one currently authorised, you will need to press the Deauthorise User button, then repeat the process above. Note that if you are currently logged into Dropbox on the browser which you are using your SmartPABX with, you will by default authorise it when you press the button, and so you must log out independently before allowing another user to authorise their Dropbox.

Only one Dropbox account may have files uploaded to it at a time. If you wish to upload your recordings to multiple users' accounts, you will need to set sharing permissions on the folder(s) your recordings are uploaded to.

## Settings

Below your Dropbox details are a set of options

### Dropbox Integration

You have successfully authorised your SmartPABX to upload files to Dropbox. You will receive recordings of calls in your Dropbox each evening.

If you wish to deauthorise the current Dropbox user and change to a different user, press the Deauthorise User button. Afterwards, you can authorise a different user to have recordings uploaded to their Dropbox. If you are currently logged into Dropbox on this web browser when you press this button, you will need to independently log out so that the new user can enter their credentials.

Current authorised user: **John Smith**  
Current usage: **878.92 MB / 2 GB**

Deauthorise User

### Dropbox Settings

Setting	Description
Folder Name	The name of the folder to upload your recordings to. If left blank this will default to <i>SmartPABX Recordings</i> . If you wish to use nested folders, simply separate the folder names using "/", minus the quotes. If the folder(s) you enter does not already exist, it will automatically be created for you.
Sub Folders	If this is selected, for each day you receive recordings, a sub-folder will be created within the above folder to store those recordings. The name of the sub-folder will be the date on which the recordings were made.
CSV File	If this is selected then in addition to the recordings, you will also receive a CSV file containing information about the recordings uploaded each day.
Recording Range	If this value is set to Daily, then whenever your PABX uploads its recordings to Dropbox, you will only receive the recordings for the day in which the upload is done. If this value is set to All, then this will upload all of your PABX recordings every time your PABX uploads to Dropbox. This is useful for retrieving files which were recorded prior to your initial use of Dropbox integration.

Submit



- **Folder Name:** The name of the folder your recordings will be uploaded to. If left blank, they will be put in a new folder called *SmartPABX Recordings*. If you wish to use multiple folders; for example *SmartPABX Recordings/Daily Uploads* then simply separate the folder names with a forward slash ("/"). If the folders you enter do not already exist they will be created for you.
- **Sub Folders:** If you wish to have the recordings for each day separated into their own separate folders, tick this box. By default, this would put recordings made on the 1/1/2016 into *SmartPABX Recordings/1-1-2016*, recordings from 2/1/2016 to *SmartPABX Recordings/2-1-2016*, and so on and so forth. If this is not ticked, all of the files would be placed into the *SmartPABX Recordings* by default.
- **CSV File:** If this is selected then for each day in which recordings are uploaded you will also receive a CSV with details about each recording. The CSV will be named *Date-Month-Year.csv* for the date which it refers to.
- **Recording Range:** If this is set to *Daily* then each night you will receive all recordings for the previous day. If this is set to *All* then each night you will receive all recordings in your SmartPABX. This option is useful for retrieving recordings for days prior to setting up your Dropbox integration with your SmartPABX.



# Google Drive

## Google Drive

If you wish, you may enable your SmartPABX to automatically upload recordings to your Google Drive each night. In order to do this, go to the Google Drive section of your SmartPABX. You will be presented with a button to securely log into your Google account.

### Google Drive Integration

To authorise your Google Drive account to receive recording files each night, please click the button below. It will redirect you to Google Drive. After you have successfully authorised yourself with Google Drive, you will be redirected back here. Once this has been done, your recordings will be uploaded to Google Drive each night provided you have sufficient space on your Google Drive.

Google Drive Authorisation

Once you have logged in and given permission for the PABX Recording Uploads to access your Google Drive, you will be returned to your SmartPABX. You should see a screen similar to the following:

### Google Drive Integration

You have successfully authorised your SmartPABX to upload files to Google Drive. You will receive recordings of calls in your Google Drive each evening.

If you wish to deauthorise the current Google Drive user and change to a different user, press the Deauthorise User button. Afterwards, you can authorise a different user to have recordings uploaded to their Google Drive. If you are currently logged into Google on this web browser when you press this button, you will need to independently log out so that the new user can enter their credentials. It is also recommended that you disable PABX Recording Uploads from having access to your account at [myaccount.google.com](https://myaccount.google.com).

Deauthorise User

If you see this screen, then each morning you will receive recordings in your Google Drive account. The files will be uploaded to a folder called SmartPABX Recordings (which will be created if it doesn't exist). In addition to the recordings, a CSV file will be uploaded containing details on the files uploaded that day, with the CSV's filename designated which files were uploaded that day. For example, a CSV called 2017-11-30.csv would contain details about the files uploaded on the 30th of November, 2017.

If you wish to use a separate Google account for uploading files to other than the one currently authorised, you will need to press the Deauthorise User button, then repeat the process above. Note that if you are currently logged into Google on the browser which you are using your SmartPABX with, you will by default authorise it when you press the button, and so you must log out independently before allowing another user to authorise their Google account.



# Call Costs

## Overview

It is possible to receive emails and generate CSV files containing details about your calls. These call records can also calculate Broadband Solutions' cost of your calls, which can be used to predict your bills or to calculate the price of calls for other offices which use your PABX.

In order to access the settings for your call records, go to the Call Costs section of your PABX. You

Setting	Value
Local/National Call Flagfall	\$ 0.10
Local/National Call Rate	\$ 0.00
Local/National Call Increment	0 seconds
Mobile Call Flagfall	\$ 0.00
Mobile Call Rate	\$ 0.17
Mobile Call Increment	60 seconds
1300/1800 Call Flagfall	\$ 0.30
1300/1800 Call Rate	\$ 0.00
1300/1800 Call Increment	0 seconds
Call Cost Emails	
Call Cost Range	Daily

Update

Export Yesterday's Calls   Export Last Month's Calls

should see an interface similar to the one below:  
settings are as follows:

The

**Local/National Call Flagfall:** The cost to initiate a call to a national number

**Local/National Call Rate:** The cost for each increment of this call to a national number.

**Local/National Call Increment:** The increments in which a call to a national number charges. For example, if this is set to thirty, then for each thirty seconds that this call goes for the local/national call rate will be added to the cost of the call.

**Mobile Call Flagfall:** The cost to initiate a call to a mobile phone.

**Mobile Call Rate:** The cost for each increment of this call to a mobile phone.

**Mobile Call Increment:** The increments in which a call to a mobile phone charges.

**1300/1800 Call Flagfall:** The cost to initiate a call to a number beginning with 1300 or 1800.

**1300/1800 Call Rate:** The cost for each increment of this call to a number beginning with 1300 or 1800.

**1300/1800 Call Increment:** The increments in which a call to a 1300 or 1800 number charges.



**Call Cost Emails:** You may put a comma-separated list of email addresses into this field. The emails in this field will be sent CSV files containing the details of the call range selected (see below).

**Call Cost Range:** If Daily is selected, then each morning a CSV file containing the details of calls from the previous day will be sent to each email address added in *Call Cost Emails*. If Monthly is selected, then on the first of each month a CSV file containing the details of calls from the previous month will be sent to each email address added in *Call Cost Range*.

These values can be changed if the cost of calls on your PABX are different to the default values, but they will not affect your call costs. These are for display and calculation purposes only. Furthermore, errors can occasionally occur in the calculation of them, so if the values given when calculating call costs is different to the value given on your bill, you should always assume that the value on the bill is correct.

In order to use call costing correctly, each extension whose calls you wish to record the details of will need to be part of a group. In order to add an extension to a group, go to that extension's settings and find the *Group* option. From there, you can select a group for that extension to be part of, or add new groups with the *Edit list* option.

In addition to receiving emails, you can also export call details by using the *Export Yesterday's Calls* and *Export Last Month's Calls* buttons at the bottom of the page. As the name suggests, using the *Export Yesterday's Calls* button will generate a CSV file of calls and their details for the previous day. The *Export Last Month's Calls* button will generate a CSV file of calls and their details from one month ago to the previous day.



# Number Extensions

## Number Extensions

With the number extensions feature enabled, you can configure shortcut keys for your handsets.

### Configure Number Extensions

Number:	Action:	Value:
2	Go to Extension ▾	9001 ▾
3	Go to IVR ▾	Answer ▾
4	Go to DID ▾	1234567800 ▾
5	Go to Queue ▾	Calls ▾
6	--- ▾	--- ▾
7	--- ▾	--- ▾
8	--- ▾	--- ▾
9	--- ▾	--- ▾

Save All

of the following options:

- **Go to IVR:** Go to an IVR
- **Go to Extension:** Go to an extension
- **Go to DID:** Dial a DID
- **Go to Queue:** Go to a queue

For each number, you can select one

After selecting an action for each number, you can select the value that applies to that number. After pressing save and applying the changes, the shortcuts will be applied. To use a shortcut, simply dial one of the configured numbers and it will go to the value you have configured.



# Night Switch

## Overview

Night Switches are settings that can be used to redirect a large number of extensions, DIDs, and single-number shortcuts to a particular number. A night switch can be turned on and off by dialling \*30 on a handset on your phone. This is useful for if you wish to quickly turn off and on redirects after-hours.

## Creating a Night Switch

To create a night switch, press the *Create* button on the night switches page. You will be presented with a form with the following details:

- **Description:** A description for this night switch.
- **Redirect Number:** The number you wish to redirect to.
- **Extensions:** The extensions you wish to redirect to the above number. This should be a comma-separated list - for example, *9001,9002,9003*.
- **Toggle Number:** The number to dial in order to turn this night switch on or off. You cannot select a number that is already in use by another night switch or as a login or logout code for a queue.

After filling out the form, press the *Create* button to create this night switch.

## Edit Night Switch

You can edit a night switch by pressing the *Edit* button next to the night switch you wish to edit. This will present you with a form similar to the one for creating a night switch.

- **Description:** A description for this night switch.
- **Redirect Number:** The number to redirect to.
- **Extensions** The extensions you wish to redirect to the above number. This should be a comma-separated list - for example, *9001,9002,9003*.
- **Toggle Number:** The number to dial to turn this night switch on or off. You cannot select a number that is already in use by another night switch or as a login or logout code for a queue.
- **Status:** Whether this night switch is on or off. If it is on, then dialling the configured numbers will redirect them to the specified number. If this is off, all configured numbers will work as per usual.

You can save your changes by pressing the *Update* button. It is recommended that you only edit night switches whilst they are off.

You can add a DID to a night switch by selecting it from the DIDs section and pressing *Add*. Any DIDs can be removed from this night switch by pressing the *Remove* button next to it. Any DIDs shown here will be redirected to the redirection number whilst the night switch is on, and cannot be edited whilst it is on.

The same can be done for single digit shortcuts by ticking the shortcuts you wish to have redirected whilst this night switch is on. To remove a single digit shortcut from this night switch, simply uncheck





the shortcuts you no longer wish to have redirected and press *Save*. It is recommended that you do not use any DIDs or single digit shortcuts for more than one night switch.

## Delete Night Switch

To delete a night switch, press the delete button next to the night switch you wish to delete. After confirming the deletion, the night switch will be removed. It is recommended that you turn off a night switch before deleting it, although if you do not, it will turn itself off before deletion.

## Night Switches in IVRs

Night Switches can be controlled in IVRs with the following options:

- **Night Switch Redirect:** If the selected night switch is currently turned on, the user will be redirected to the selected IVR. If the selected night switch is currently turned off, the IVR will continue to the next IVR action.
- **Night Switch On:** This will turn the selected night switch on. If the night switch is already on, no change will occur.
- **Night Switch Off:** This will turn the selected night switch off. If the night switch is already off, no change will occur.



# Windows Reception Console

## Introduction

Using the SmartPABX Reception Console, you are able to use your Windows PC to control your extension in a variety of ways as well extend the functionality of your PABX system through a number of ways including:

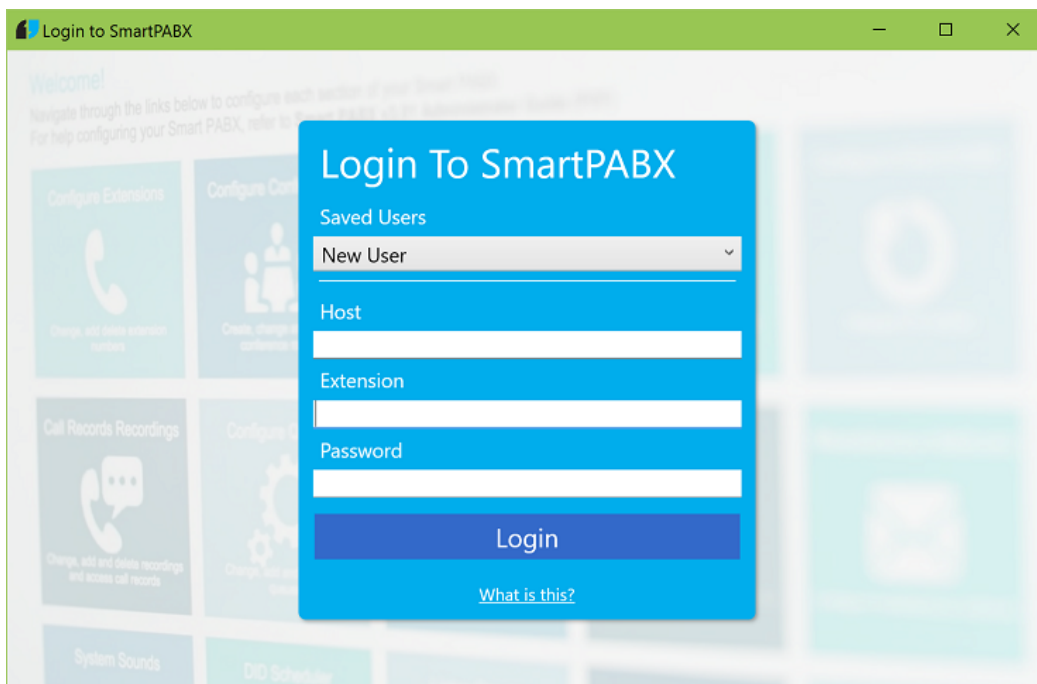
- Contact Directories
- Outlook, Microsoft/Office365 Account & Google Account integration
- Call Logging with Integrated Notepad
- SmartLink contextual URLs
- Extension Monitoring & Filtering

## Setting Up

To use the Windows Reception Console you must ensure that you have the following:

- The URL of your SmartPABX Online Console
- Your extension number (usually in the numbered format of 9xxx)
- A web password (this is different to your extension password)

With these credentials, you will be able to login to the program;

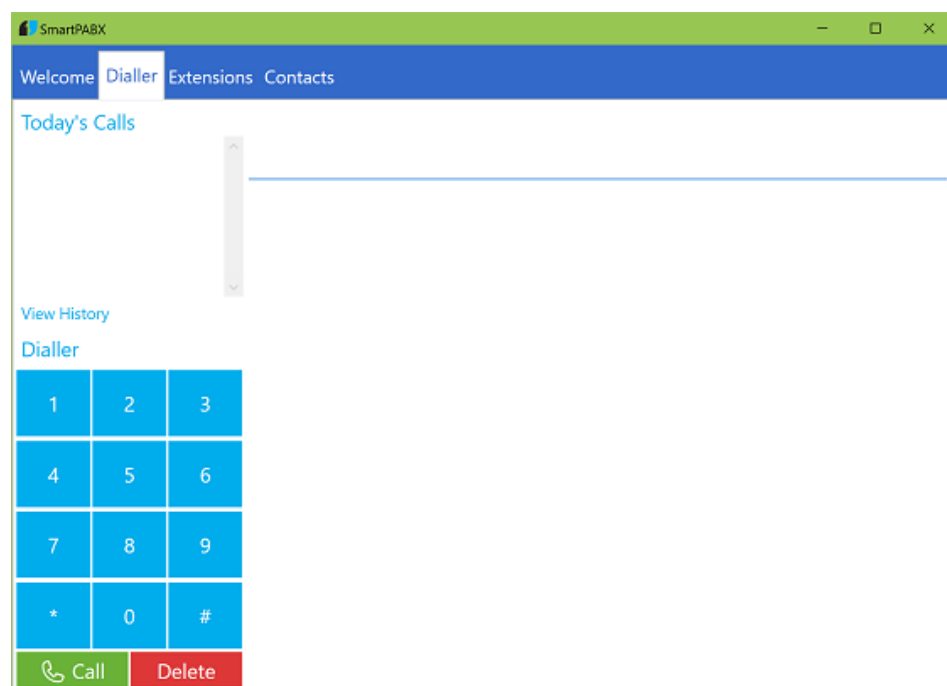


Note that if your login is successful, the application will save the login details for future.

For security purposes you do need to login with every launch of the application but this is something that is obviously made much less cumbersome with the addition of the saved users.



## Dialler



The Dialler can be used to call phone numbers through your application as well view recent calls and run basic tasks. Using either the dialpad in the bottom corner or the *universal input* at the top of the page. You are able to type phone numbers directly into the bar as well as contact names.

# 0433245406

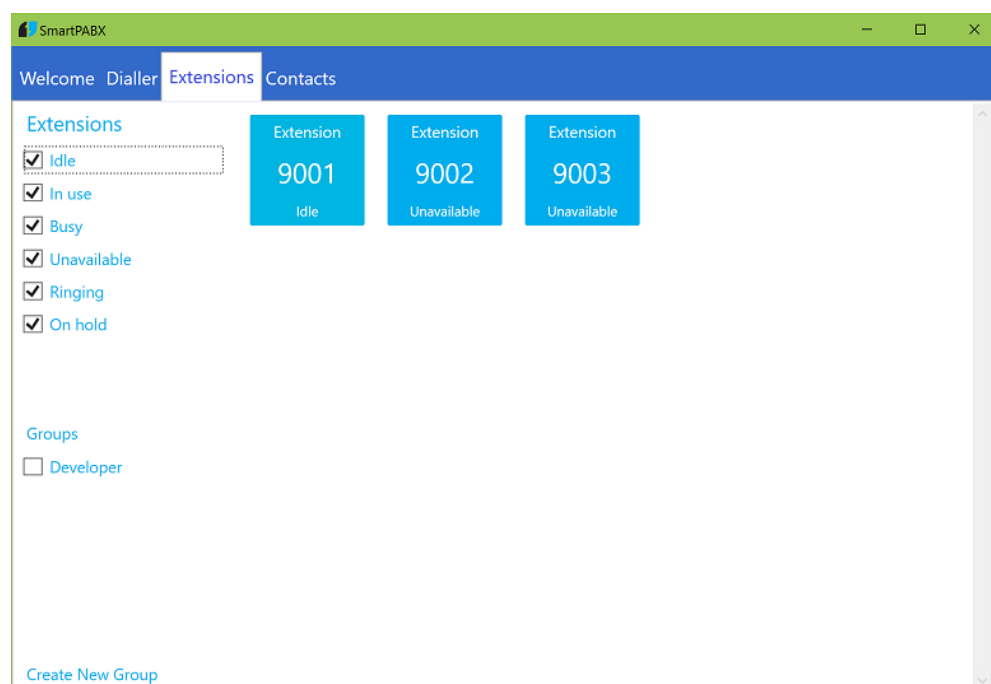
## Call 0433245406

Options will appear as you type, you can run the first available option by pressing enter.

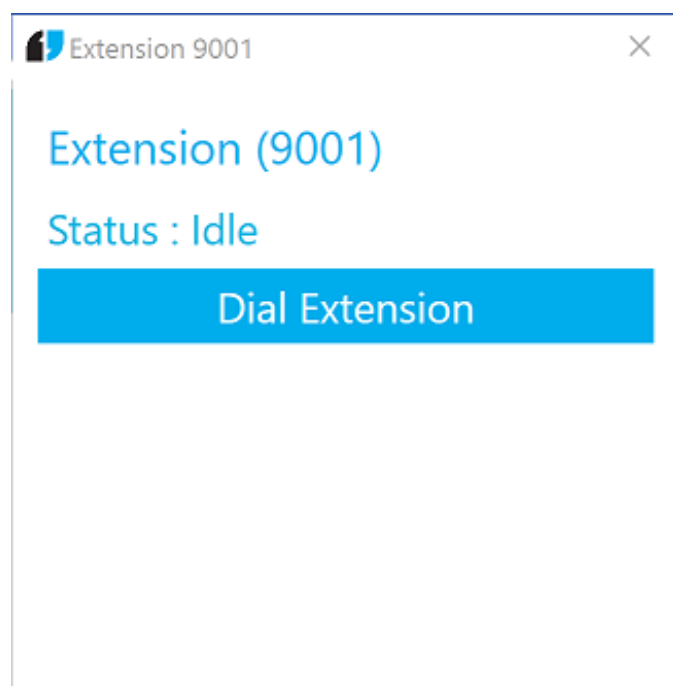
The Dialler also allows you to view the calls that have been made through the application and any notes taken during these calls can be edited and saved.

Note that calls made using the physical handset will be shown in the application unless the setting is turned off.

## Extensions Overview



The Extensions view is a live display of all the extensions in a SmartPABX network. Using the view you are able to view the current state of all extensions, filter extensions by group and status as well as call extensions using the applications dial interface.



Clicking an extension's tile will show a minimal pop-up that displays the status and call button for the extension. Like the view, the pop-up will stay updated to the PABX and requires no restart or re-opening in order to stay up to date.

## Extension Filters and Groups

### Status Filters



## Extensions

☒ Idle  
☒ In use  
☒ Busy  
☒ Unavailable  
☒ Ringing  
☒ On hold

Extension

9001

Idle

Extension

9002

Unavailable

Extension

9003

Unavailable

The Extensions window comes with the ability filter and group extensions very easily, allowing for specific monitoring depending on certain criteria.

By default, you are able to filter extensions based on their status easily using the checkboxes on the side of the view. Multiple statuses can be selected and as expected these filters will be populated in real time as updates are made.

## Extension Groups

Groups

☐ Developer

Create New Group

New Extension Group

Name

Extensions

☐ 9001: Extension

☐ 9002: Extension

☐ 9003: Extension

Create

SmartPABX systems have always had extension group functionality and these same groups are available within the SmartPABX Reception Console. Groups from the PABX will be populated on the program startup and selecting these groups act like a filter, only showing extensions in the group selected.

Extension groups can be created in the console and the changes will be pushed to SmartPABX system. **Extensions can only be assigned to one group at a time** so be aware of this when



creating or modifying extension groups. You can modify an existing extension group by *right clicking the group in the list*.

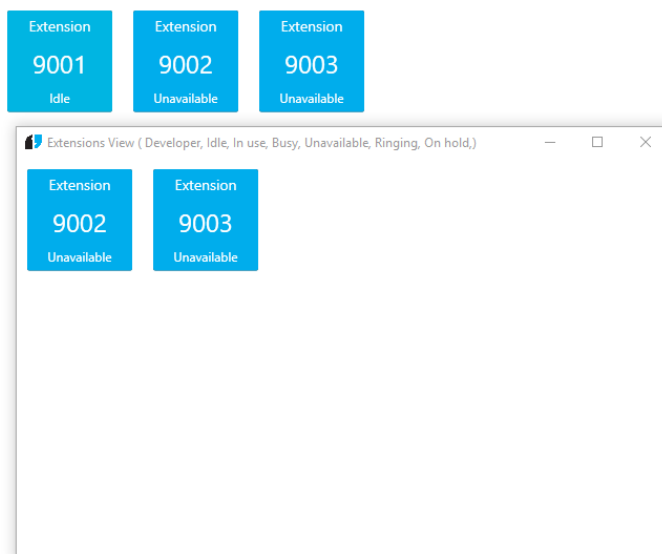
## Show Filters In New Window

### Extensions

- ☒ Idle
- ☒ In use
- ☒ Busy
- ☒ Unavailable
- ☒ Ringing
- ☒ On hold

### Groups

- ☐ Developer

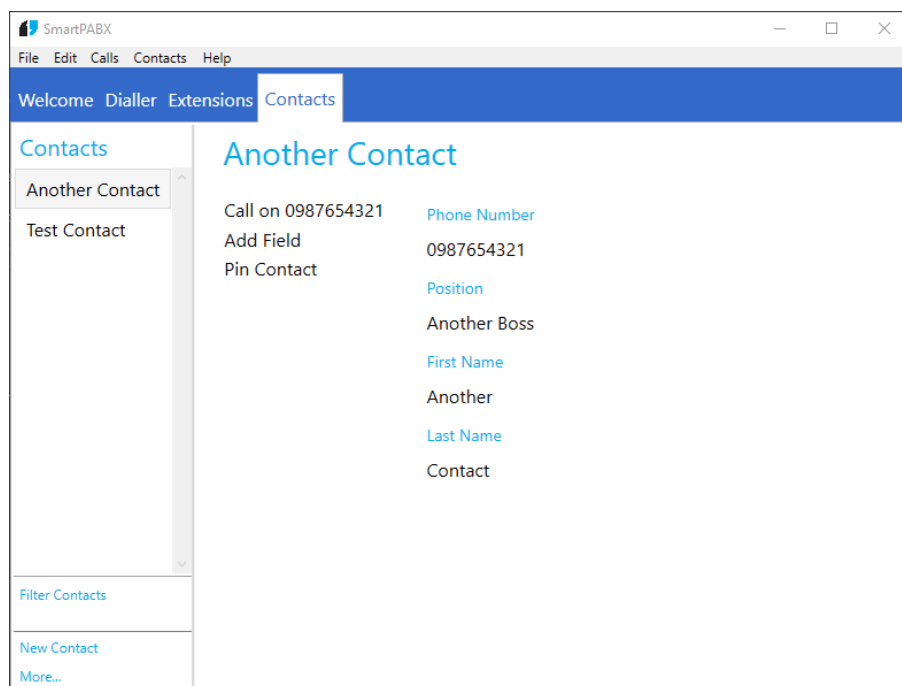


[Create New Group](#)

*Right clicking either the status filter or extension groups list will allow you to view the currently selected filters in a new window. This will open a separate window from the main one with all the extensions displayed which abide to the filters selected at the time.*

The window is completely resizable and flexible, allowing for easy monitoring of extensions even when the main user interface is not visible.

## Contacts





The reception console comes with a built in contact directory which allows you to call various contacts from within the application as you would in a typical phone directory. A contact is very flexible, the details of a contact allowing for you to enter any detail in with an associated value.

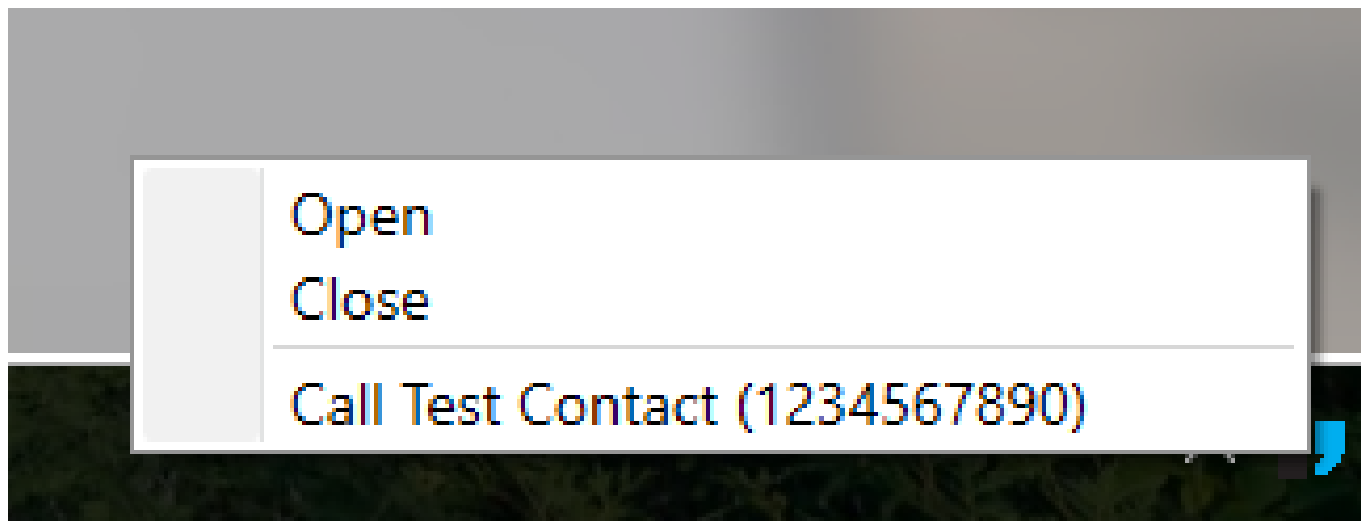
Creating a new contact is easy, selecting new contact in the bottom right hand corner showing a simple form which requires a name and a simple details modifier. Field names will auto-complete depending on existing fields in the contacts and these details can be modified after the contact is added just by right clicking the detail in the contact view.

Contact screens will automatically populate possible numbers to call depending on whether the program believes its a valid number.

Pinning a contact is good for popular contacts as this means the contact will stay available in the

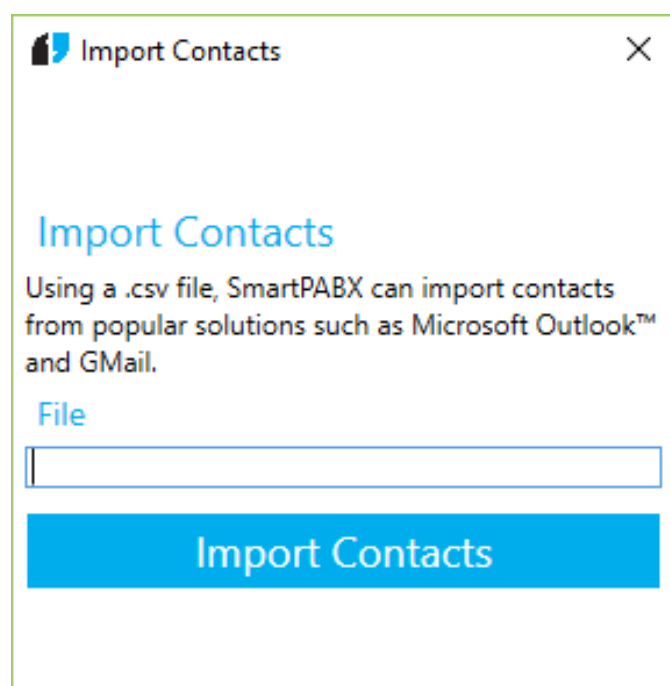


program's task bar icon for fast calling.



## Importing Contacts from CSV

Contacts can be imported into the program by using a generated Comma Separated Value (.csv) file.



Clicking on *More...* in the bottom right hand corner of the Contacts page will show you an import window in which you can open a .csv file to import.

## Importing Contacts from Account

The SmartPABX Reception Console also has support for importing contacts from Google and Microsoft Accounts. Both accounts work identically with how they behave, imports can be made by selecting *Import from Account* in the *More...* menu.





Manage Contact Sync

Contact Sync

Microsoft/Office 365 Account

Setup Enable Sync ☐

Google Account

Setup Enable Sync ☐

Outlook Application

Import Enable Sync ☐

With this menu, there are technically only two accounts available with Outlook referring to the Office product you have installed on your computer. Clicking Setup on Microsoft/Office365 or Google will open a web browser window in which you authenticate SmartPABX with your account's contact directory.

**Please note this does not give the application access to your account's user name or password, these are still kept by Microsoft or Google who also handle all authentication with the application.**

Manage Contact Sync

Contact Sync

Microsoft/Office 365 Account

Import Remove Enable Sync ☐

Google Account

Setup Enable Sync ☐

Outlook Application

Import Enable Sync ☐

Once an account has been linked, an *Import* button is added which will import all the contacts from the server. This can be done as many times as you want and the program will try to not import the same contact twice (however if the contact is edited locally this may be impossible)



The Outlook Application cannot be "set up" and so clicking Import will attempt to open the application in the background and if this application is set up all contacts from the local directory will be imported.

SmartPABX has the ability to have a *background sync* running for each of the accounts that have been set up. Clicking enable sync will allow the application to automatically import contacts on:

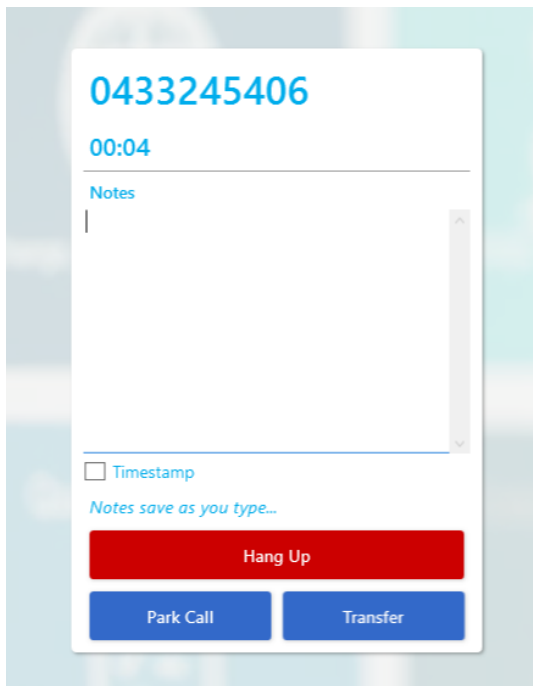
- Startup
- Every 30 minute interval whilst the application is open

This means that if you update the service's directory outside of the console, SmartPABX will ensure the directory in app is kept up to date.

## Call Operations

The SmartPABX Reception console has the ability to manage calls from your desktop PC, including functionality such as parking, transferring and hanging up ongoing phone calls without the need to touch your physical SIP device.

### The Call Window



When receiving or making a call, a call window will appear in the tabs of the application. By default, this window will require you to manually select it in order to see the incoming call however automatic focusing of new call windows can be enabled in the Call section of the preferences menu.

### Taking Notes

The call window has a built in scratchpad for taking notes during the call. These notes are saved as you type and can be edited after the call has ended. If you select the timestamp option underneath the window, the current time elapsed of the call will be appended to the front of every new line of the note.



## Call Transfers

Transfer Call to...

Extensions

9001 Extension

9002 Extension

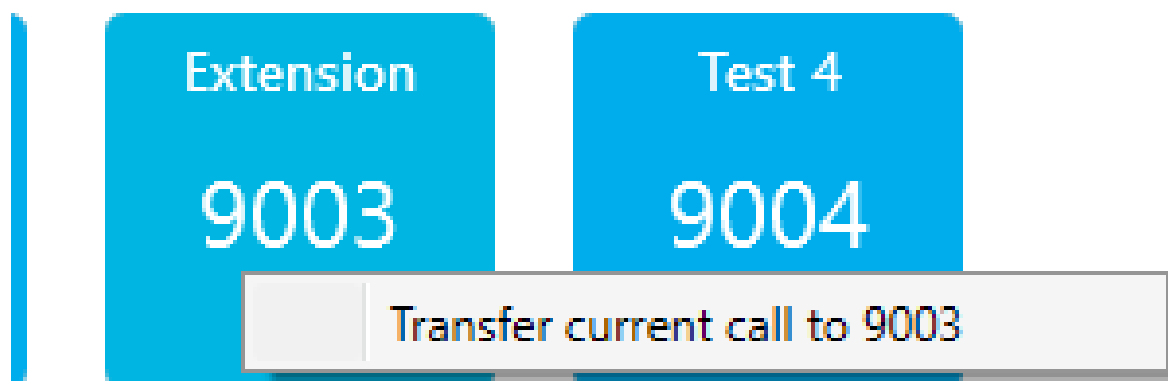
9003 Extension

9004 Test 4

Submit

Clicking the "Transfer" button will open up a transfer dialog in which the current call can be transferred to another number.

Extensions will populate the search box and special buttons below the screen, providing autocompletion for both the extension number and comment as you type. Despite this feature, calls can be transferred to any number that is typed into the box; both internal and external.



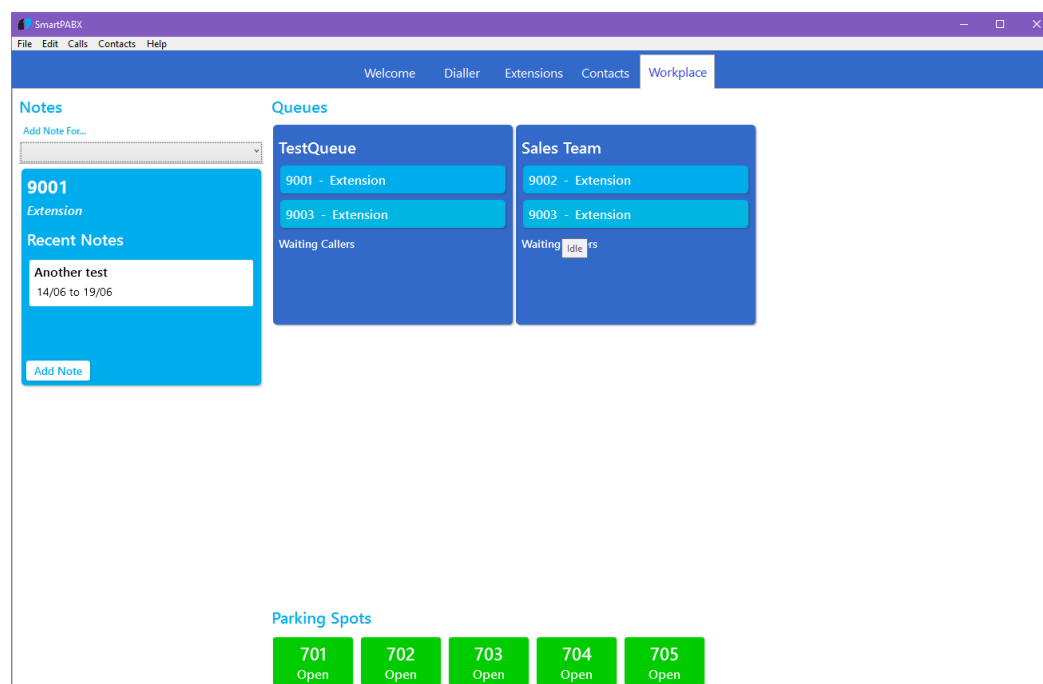
Transfers are not limited to the application however, areas like the extension menu providing the option to right-click-to-transfer on valid extension tiles.

## Call Parking

Clicking the "Park Call" button will send the current call to the next available parking spot. This call can be retrieved again, however if the window is closed you will need to dial the parking spot manually using information from the "Workplace" section.



## Workplace



The Workplace menu contains information relating to the organizational aspects of your SmartPABX.

### Console Notes

Using the Workplace, you pin console notes to an extension for a time period. To add a note, use the dropdown menu located next to notes. Selecting an extension will show a new note prompt, asking for two times to set the note between. These fields support natural language such as:

- *tomorrow 5pm*
- *friday night*
- *next week*



After submitting the note it will appear in the notes section of the Workplace. Right click the note to edit its contents and times if necessary.

The note will disappear from the view after time has elapsed however you can manually remove a note by using the *Archive* button in the edit note screen.

## Queues

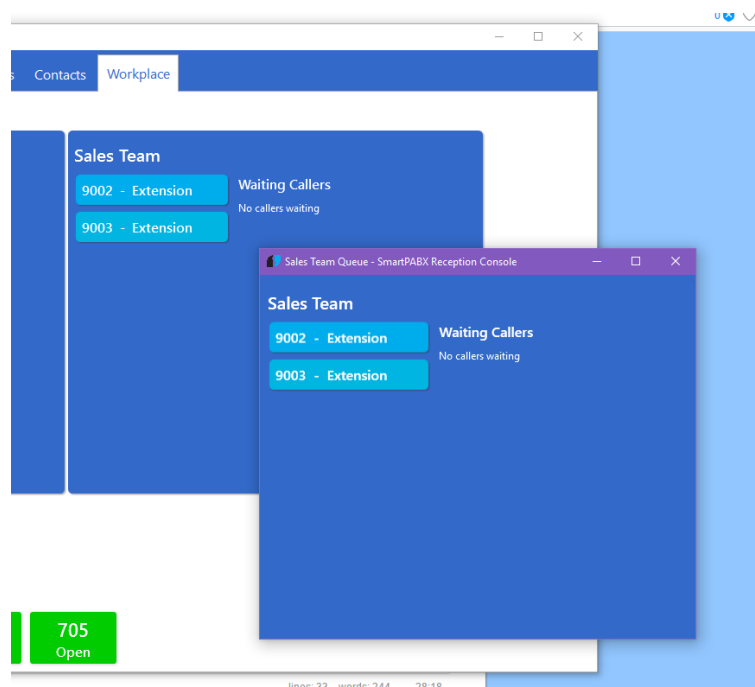
### Queues

The screenshot displays two queue panels side-by-side. The left panel, titled 'TestQueue', has a red 'Hide' button and a blue 'Pop Out' button. It lists two extensions: '9001 - Extension' and '9003 - Extension'. To the right of the list, it says 'Waiting Callers' and 'No callers waiting'. The right panel, titled 'Sales Team', lists two extensions: '9002 - Extension' and '9003 - Extension'. It also says 'Waiting Callers' and 'No callers waiting'.

The other major feature of the Workplace menu is the Queues list. All non-empty, active queues will be available to monitor in the SmartPABX reception console; details such as waiting callers and the status of each queue member updating in real time.

This screenshot provides a closer look at the 'TestQueue' panel. It shows two extension buttons: '9001 - Extension' (blue) and '9003 - Extension' (red). To the right, under 'Waiting Callers', it indicates '1 callers waiting'. A white box displays the caller's ID '9003' and their status 'In queue for 1 seconds'.

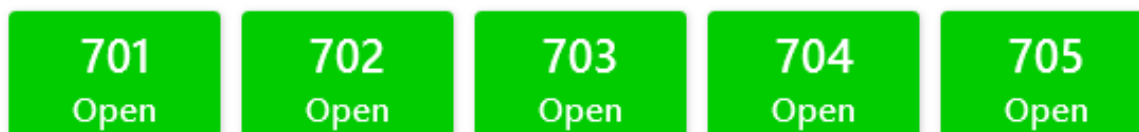
If you want to hide a queue from the queues list, you can do this by clicking the hide button which appears in the queue elements upon mouse over. Note that if you want to show a queue again you can do this by editing the list saved in your call preferences.



If you select the *Pop Out* option you can view a queue in a separate, resizable window.

## Parking Spots

### Parking Spots



Down the bottom of the Workplace menu you can see the current status of your PABX system's parking spots.



# Call Wrap Codes

## Introduction

If you have many extensions in queues answering customer enquiries, you may wish to report on the quantity of different call types customers are talking to your users about. This can be achieved via call wrap up codes.

Call wrap up codes are different ways of classifying what type of call a call was. Call wrap up codes consist of groups, each of which is associated with a queue. A queue can only have one call wrap up code group associated with it at a time. After a customer has hung up whilst talking with a person in a queue, if that queue has a call wrap up group associated with it, the person on the extension will be asked to press a button to record what type of call they just had.

## Creating a Call Wrap Group

To create a call wrap group, click on the Call Wrap Codes section of your PABX and press the *Add Call Wrap Group* button. This will take you to a new form.

**Create Call Wrap Group**

Option	Value
Description	Sales
Button #1	Purchase Request
Button #2	Price Enquiry
Button #3	Other
Button #4	
Button #5	
Button #6	
Button #7	
Button #8	
Button #9	
Associated Queue	---

From

here, give the call wrap group a description, and then fill out what each call type corresponds to which button on a handset. For example, in the above screenshot, after the customer has hung up, the person on the extension will be prompted to press one to record the call as a purchase request, two if the call was a price enquiry, and three if the call was another type of call. You do not have to use each button in a call wrap group, or even use them in ascending order, but you must use at least two buttons in each call wrap group.

A call wrap group must be associated with a queue, or it will not work. You do not have to select a queue when creating a call wrap group, but it is recommended. A queue cannot be associated with a call wrap group if that queue is already associated with another call wrap group.



## Other Call Wrap Group Options

In addition to creating call wrap groups, you can also delete or edit them.

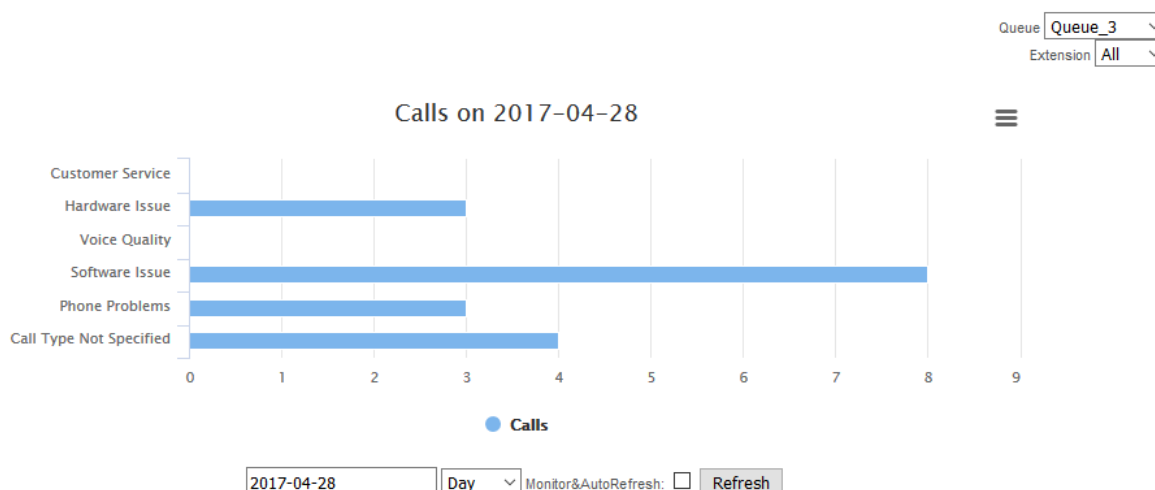
In order to delete a call wrap group, simply select the *Delete* button on the Call Wrap Codes page next to the group you wish to delete. After confirming that you wish to delete that group, that group will be deleted.

In order to edit a call wrap group, press the *Edit* button next to the call wrap group you wish to edit. On the edit page you can change the description, button values, or queue a call wrap group is associated with.

## Reporting on Call Wrap Codes

To see the results of call wrap codes, go to a report which has a queue associated with it. Click on the *Call Wrap Data* page to see the number of calls per group.

[Report home](#) | [Call Records](#) | [Extension status](#) | [Minutes SLA](#) | [Minutes Compare](#) | [Queue stats](#) | [Agent logs](#) | [Historical Queue Data](#) | [Ranged Queue Data](#) | [Call Wrap Data](#)



You can change the queue or extension you are seeing data for by using the controls in the top-right. Additionally, you can change the range of data you're seeing using the controls at the bottom of the page.

If you cannot find the queue you wish to see data for, it is because it is not associated with the report group you're looking at.

If the user who took the call did not select an option for the type of call they had, that will be recorded as *Call Type Not Specified*.



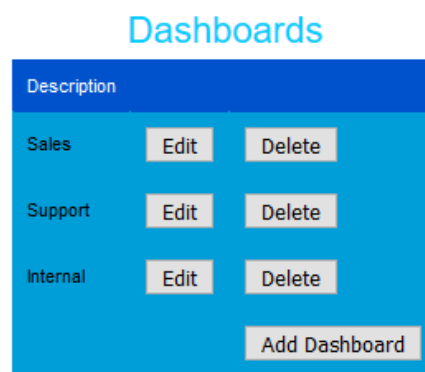


# Dashboard

## Overview

It is possible to set up a number of dashboards on your PABX for the displaying of constantly updated data. The exact data being displayed and updated can be configured by you, with as much flexibility as you would like. You may wish to use a single dashboard to show an overview of your PABX and its stats, or you may prefer to use multiple dashboards with each giving more information about a particular extension or group of extensions. These dashboards are ideal for displaying in an easy to view location, such as a widescreen television, for constant data updates.

## Dashboards



In order to create a new dashboard, press the *Add Dashboard* button on the Dashboards page of your PABX. In order to create a dashboard, all you need to do is choose a description for the dashboard, and the number of columns used to display the modules. The description can be anything you want, provided the name is not already in use by another dashboard. Once you have chosen a name for your new dashboard, simply press the *Create* button.

If you wish to delete a dashboard you are no longer using, simply press the *Delete* button next to the dashboard you wish to delete. This will take you to a confirmation page. After confirming that you wish to delete this dashboard, it will be deleted. If deleting a dashboard, please ensure that you do not have any pages with that dashboard open prior to deletion.

If you wish to change the name of a dashboard, simply click *Edit* by the side of the dashboard you wish to rename, and then on the following page, choose a new name and press *Update*. This page will also allow you to create and modify the modules used by this dashboard.

## Modules

### Creating Modules

In order to create content for your dashboard, you will need to add modules to it. Each module is a small square which will search for and display data according to what you've specified. A dashboard will display all modules associated with it. In order to create a new modules, press the *Add Module* button after pressing the *Edit* button for a dashboard. This will take you to a new form.



## Create Dashboard Module

Option	Value
Description	<input type="text"/>
Report Type	Abandoned Calls ▾
Refresh Time	<input type="text"/>
Date Range	Today ▾
Extension(s)	<input type="text"/>

The meaning of each field is as follows:

- **Description:** The description of this module. This will be displayed as the title of this module in the dashboard.
- **Report Type:** The type of data this module will be looking up. Many of these rely on other settings in the module in order to determine the precision of the data being looked up. The different data types are as follows:
  - **Abandoned Calls:** The number of calls unanswered in the selected queue today.
  - **Active Calls:** The number of calls that the specified extensions are currently in.
  - **Average Call Time:** The average length of calls for the specified extensions in the selected date range.
  - **Average Wait Time:** The average amount of time users in the specified queue have had to wait today.
  - **Calls Made:** The number of calls the specified extensions have made in the selected date range.
  - **Calls Received:** The number of calls received by the specified extensions in the selected date range.
  - **Completed Calls:** The number of calls received by the specified extensions which were answered.
  - **KPI:** The number of minutes out of a specified amount the specified extensions have met within the selected date range. Note that this option will display the total number of minutes between all specified extensions. If you wish to see the KPI for a specific extension then it is recommended that you either only enter one extension for this module or use the existing feature in the reports system. In addition, this only looks up data for received calls, not outgoing calls.
  - **Queue Waiting:** The total number of people waiting in the specified queue, as well as the details of the two members who have been waiting the longest.
  - **Total Call Minutes:** The total number of minutes the specified extensions have spent in calls within the selected date range. This only looks up data for received calls, not outgoing calls.
- **KPI:** If selecting the KPI option for the report type, this allows you to specify how many minutes of talk time the specified extensions should be achieving within the selected date range.
- **Refresh Time:** The time in seconds of how long you wish this module to display data between



refreshes. If the selected report type for this module is active calls, average wait time, or queue waiting, it is suggested that you set this to at least ten seconds, otherwise you may notice performance issues with your PABX.

- **Date Range:** The range of when you wish to look up data. If Today is selected, only data for today will be looked up. If This Week is selected, data from the most recent Monday (or today if today is a Monday) to the present day will be looked up. If This Month is selected, data from the first of the month (or today if today is the first of the month) to the present day will be looked up. A date range cannot be selected for active calls, average wait time, queue waiting, or abandoned calls.
- **Extension(s):** The extensions you wish to look up data for. This should be a comma-separated list, such as 9001,9002,9003.
- **Queue:** The queue you wish to view data for.
- **Queues:** If you wish to add all of the extensions in a queue to this module, simply tick the box next to the queues you are interested in. If you add or delete extensions from one of the selected queues, the module will automatically alter the extensions it is looking up data for.
- **Ring Groups:** If you wish to add all of the extensions in a ring group to this module, simply tick the box next to the ring groups you are interested in. If you add or delete extensions from one of the selected queues, the module will automatically alter the extensions it is looking up data for.

Note that many of these report types do not distinguish between internal and external calls when collecting data. In addition, calls that were placed to an extension via a queue may not have their data displayed depending upon the module.

Once you have selected all of the options for your module, press the *Create* button to create a new module.

## Editing Modules

To edit a module, press the *Edit* button beside the module which you wish to edit. This will take you to a form which will allow to change any aspect of the module. Once you have made the necessary changes, press the *Update* button to save the changes to your module.

## Deleting Modules

To delete a module, press the *Delete* button beside the module which you wish to delete. Once you have confirmed that you wish to delete the selected module, it shall be deleted.

## Viewing

Once you have configured modules for your dashboard, you can view it by pressing the *View Dashboard* button at the bottom of the dashboard's edit page.



Depending upon how long you set the refresh times for each module, it may take a few seconds to load in initial data.

If you notice issues with loading in data consistently, or find that your PABX is performing slowly whilst your dashboard is up, try removing some modules or increasing the refresh time for each module.



# Paging Groups

## Overview

In addition to paging all phones (dial 99) and paging a specific phone (dial 888 followed by the extension you wish to page), you may also set up custom paging groups. These groups allow you to page a custom number of extensions, which you can organise however you would like. For example, you may wish to put all extensions used by sales representatives into a paging group so that you can page only your sales representatives. This section of the manual will explain how to set up and manage paging groups.

## Create Paging Group

In order to create a paging group, press the *Create* button on your Paging Groups page. You will be presented with a form with the following details to be filled out:

- **Group Name:** The name of the paging group you will be creating. Names must be unique amongst paging groups.
- **Number:** The number to dial in order to page the group.

After you have created a paging group, you will be able to add extensions to it by editing it.

## Editing Paging Groups

In order to edit a paging group, press the edit button next to the paging group you wish to edit. This will take you to a form with the following details, which you can change:

- **Group Name:** The name of the paging group. You can change the name of an existing paging group, but it must remain unique.
- **Number:** The number to dial to page all of the extensions in this group. This can be changed at any time as long as the selected number is not currently use.

In order to add an extension to this paging group, select the desired extension from the dropdown box in the *Extensions* section, and press *Add*. The selected extension will now be part of the paging group. All of the extensions which are currently part of the paging group will be shown below the dropdown.

In order to remove an extension from this paging group, simply press the *Remove* button next to the extension you wish to remove. This will remove the extension immediately.

## Deleting a Paging Group

In order to delete a paging group, press the *Delete* button next to the paging group. You will be asked to confirm that you wish to delete the paging group. Once you have confirmed that you have, the paging group will be successfully removed.