4PSA VoipNow ® 1.6.4

Reseller's Guide

For more information about 4PSA VoipNow, check:
http://www.voipnow.com

Reseller's Guide

Manual Version 41861.22 at 2008/09/24 11:27:55

For suggestions regarding this manual contact:

docs@4psa.com

Table of Contents

Preface

Who Should Read This Guide

This Reseller's Guide must be read by the 4PSA VoipNow resellers.

Chapter 1

Edit Your Contact Information

In order to update your contact information click the Edit reseller icon available in the Clients section, which can be accessed from the left panel Navigation area.

4PSA VoipNow allows you to update your account information:

- Update your contact information
- Change your login password

You can modify the following contact details:

- Company name
- Contact name
- Password – Use this textbox to change the password. The provided password should have at least six characters to be valid.
- Confirm Password
- Phone

- Fax
- Email – The email address where 4PSA VoipNow can send you notifications about events that occur in the system.

> **Caution**
>
> The system can send automatic notifications when predefined events occur. In order to change your notification preferences, as well as the email templates used for sending these notifications, go to PBX -> Email templates.

- Address
- City
- State/Province
- Postal/ZIP code
- Country

For submitting the data, click the OK button. If you choose not to change the information, the Cancel button will return you to the previous page without any modification.

Chapter 2

Billing

View Your Personal Billing Plan

4PSA VoipNow allows you to view detailed information about your account's current billing plan. To access this information, follow these steps:

1. Click the Billing plans icon available in the Tools area.
2. In the new page that opens, click the My billing icon to view details about the prices charged for calls made by extensions on your account.
3. Depending on the billing plan type (prepaid or postpaid) and its settings, you can view one or more of the following sections:
   - Billing plan description
     - Billing plan name – The name of the billing plan for your account
     - Billing plan type – The type of the billing plan for your account: prepaid or postpaid.

- Allow incoming calls - Yes – 4PSA VoipNow displays this information only if the extensions on your account can receive calls from extensions that belong to the system as well as from extensions outside the system.
- Allow outgoing external calls - Yes – 4PSA VoipNow displays this information only if the extensions on your account can make calls to destinations outside the system.
- Allow outgoing local calls - Yes – 4PSA VoipNow displays this information only if the extensions on your account can call other extensions on the same client account.
- Allow outgoing extended local calls - Yes – 4PSA VoipNow displays this information only if the extensions on your account can call other extensions in the system (not on the same client account).
- Monthly charge – The monthly fee paid by the account owner

> **Note**
>
> This information is available only for postpaid billing plans.

- Remaining incoming calls credit – The amount currently available for incoming calls.

> **Note**
>
> This information is available only for prepaid billing plans.

- Remaining outgoing calls credit – The amount currently available for outgoing calls.

> **Note**
>
> This information is available only for prepaid billing plans.

- Number of recharges

> **Note**
>
> This information is available only for prepaid billing plans.

- Incoming money limit – The supplementary credit for external incoming calls.

> **Note**
>
> This information is available only for postpaid billing plans.

  - Outgoing money limit – The supplementary credit for external outgoing calls.

> **Note**
>
> This information is available only for postpaid billing plans.

  - Initial incoming credit – The credit that was granted for incoming calls when your account was created.

> **Note**
>
> This information is available only for prepaid billing plans.

  - Initial outgoing credit – The credit that was granted for outgoing calls when your account was created.

> **Note**
>
> This information is available only for prepaid billing plans.

- External outgoing minutes – Number of outgoing minutes available, per time interval. The number of outgoing minutes is displayed for each time interval included in the billing plan in the format:

  {m} available external minutes in time interval {T}

  The number of remaining minutes in the current month is also displayed in format:

  {m} remaining in {month}

> **Note**
>
> This information is available only for postpaid billing plans.
>
> 4PSA VoipNow displays this section only if the extensions on your account can make calls to destinations outside the system.

- Outgoing calls charges – These are the charges applied to conversations after the user has exceeded the number of available minutes.

- Local calls are charged {money unit} / second – The fee charged for calls between extensions on the same client account.

> **Note**
>
> 4PSA VoipNow displays this information only if the extensions can call locally.

If the charges for external calls are computed using a fixed prices method, 4PSA VoipNow displays the costs for each time interval in the following format:

- Calls made in time interval {T} are charged with {money unit} / second – The price charged for external calls made in time interval {T}.

4PSA VoipNow displays the costs for the calls outside the time intervals specified above:

- Calls made outside these time intervals are charged {money unit} / second – The price charged for external calls made outside time interval {T}.

4. External incoming calls charges – These charges apply to calls received from outside the system.

> **Note**
>
> 4PSA VoipNow displays this information only if the extensions are allowed to receive external calls.

View Your Billing Limits History

4PSA VoipNow allows you to view detailed information about your billing limits. To access this information click the Billing limits icon available in the Tools area.

> **Note**
>
> The **Billing limits** section is available only if your billing plan is postpaid.

The table with billing limits history contains the following columns:

- Incoming money limit – Displays the supplementary credit for external incoming calls.

- **Outgoing money limit** – Displays the supplementary credit for external outgoing calls.
- **Overusage minutes** – Displays the supplementary overusage minutes limit.
- **Every month** – Displays whether the limits are offered monthly or only for the current month.
- **Order number** – Displays the number of the request for allocating the new billing limits.
- **Date added** – Displays the date when the billing limits were enforced.

View Your Billing Credits History

4PSA VoipNow allows you to view detailed information about the history of recharges for the your billing credit. To access this information click the Billing credits icon available in the Tools area.

> **Note**
> The **Billing credits** section is available only if your billing plan is prepaid.

The table with billing credits history contains the following columns:

- **Incoming calls credit** – Displays the supplementary credit for incoming calls.
- **Outgoing calls credit** – Displays the supplementary credit for outgoing calls.
- **Order number** – Displays the number of the request for allocating the new billing credits.
- **Date added** – Displays the date when the billing credits were enforced.

Manage Your Billing Plans

View Your Billing Plan List

A billing plan is a plan which defines how a client will be charged for the calls made by his/her extensions. To view your billing plan list click the Billing plans icon available in home page, in the Tools area.

In the Billing Plan Management page, you can view the list of all billing plans available in your account. You can also perform actions on these billing plans. For example, you can:

- Add a new billing plan
- Search for specific billing plans
- Edit billing plans details
- Delete billing plans

4PSA VoipNow displays the following information on each billing plan:

- S – The status of the billing plan, displayed using an icon: Enabled or Disabled. Click this icon to change the status of the billing plan.

> **Note**
> You can change the status of a billing plan only if it is not currently used.

- I – The permission for incoming calls displayed using an icon: Allowed and free, Allowed and charged or Not allowed.
- O – The permission for external calls, displayed using an icon: Allowed or Not allowed.
- L – The permission for local calls - calls between extensions that belong to the same client account; it is displayed using an icon: Allowed or Not allowed.
- E – The permission for extended local calls - calls between extensions that belong to different client accounts in the system; it is displayed using an icon: Allowed or Not allowed.
- Name – The descriptive name of the billing plan. Click the link to edit the details of the billing plan.
- Type – The type of the billing plan: prepaid or postpaid.
- Monthly charge – The monthly fee of the billing plan.
- ExtOutCredit – The credit limit for the external outgoing calls.
- ExtInCredit – The credit limit for external incoming calls.
- Clients – The number of clients using this billing plan.
- Created – The date when the billing plan was created.
- D – Click the icon to view and edit the billing exceptions that override the costs set up in the billing plan.

Note

The default billing plan is displayed in bold characters.

Search the Billing Plan List

When the billing plan list is too long and you are searching for specific billing plans, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the plans whose fee or name fields contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of billing plans.

Another way to simplify the listing is to sort the billing plan list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

View a Billing Plan

4PSA VoipNow allows you to view detailed information about a billing plan in your list in case you don't have Billing Plans Management permission. To access this information, follow the steps:

1. Click the Billing plans icon available in the Tools area.
2. Next, click the name link of the billing plan you want to view.

   Depending on the billing plan type (prepaid or postpaid) and its settings, you can view one or more of the following sections:

   - Billing plan description
     - Billing plan name – The name of the billing plan
     - Billing plan type – The type of the billing plan for your account: prepaid or postpaid.

- Allow incoming calls - Yes – 4PSA VoipNow displays this information only if the extension on the client account using the billing plan can receive calls from extensions that belong to the system as well as from extensions outside the system.
- Allow outgoing external calls - Yes – 4PSA VoipNow displays this information only if the extension on the client account using the billing plan can make calls to destinations outside the system.
- Allow outgoing local calls - Yes – 4PSA VoipNow displays this information only if the extension on the client account using the billing plan can call extensions on the same account.
- Allow outgoing extended local calls - Yes – 4PSA VoipNow displays this information only if the extension on the client account using the billing plan can call other extensions in the system (not on the same client account).
- Monthly charge – The monthly fee paid by the client account owner using the billing plan

> **Note**
>
> This information is available only for postpaid billing plans.

- Remaining incoming calls credit – The amount currently available for incoming calls.

> **Note**
>
> This information is available only for prepaid billing plans.

- Remaining outgoing calls credit – The amount currently available for outgoing calls.

> **Note**
>
> This information is available only for prepaid billing plans.

- Number of recharges

> **Note**
>
> This information is available only for prepaid billing plans.

- Incoming money limit – The supplementary credit for external incoming calls.

> **Note**
>
> This information is available only for postpaid billing plans.

  - Outgoing money limit – The supplementary credit for external outgoing calls.

> **Note**
>
> This information is available only for postpaid billing plans.

  - Initial incoming credit – The credit that is granted for incoming calls when the account is created.

> **Note**
>
> This information is available only for prepaid billing plans.

  - Initial outgoing credit – The credit that is granted for outgoing calls when the account is created.

> **Note**
>
> This information is available only for prepaid billing plans.

> **Note**
>
> 4PSA VoipNow displays only sections that are enabled in the billing plan applied on your account.

- Available external outgoing minutes - Number of outgoing minutes available, per time interval. The number of outgoing minutes is displayed for each time interval included in the billing plan in the format:

  {m} available external minutes in time interval {T}

  The number of remaining minutes in current month is also displayed in format:

  {m} remaining in {month}

> **Note**
>
> 4PSA VoipNow displays this section only if the extension on the client account using the billing plan can make calls to destinations outside the system.

- Outgoing calls charges – These are the charges applied to conversations
  - Local calls are charged {money unit} / second – The fee charged for calls between extensions on the same client account.

    > **Note**
    >
    > 4PSA VoipNow displays this information only if the extensions on the client account using the billing plan can call locally.

  If the charges for external calls are computed using a fixed price method, 4PSA VoipNow displays the costs for each time interval in the following format:

  - Calls made in time interval {T} are charged with {money unit} / second – The price charged for external calls made in time interval {T}.

  4PSA VoipNow displays the costs for the calls outside the time intervals specified above:

  - Calls made outside these time intervals are charged {money unit} / second – The price charged for external calls made outside time interval {T}.

3. External incoming calls charges – These charges apply to calls received from outside the system.

   > **Note**
   >
   > 4PSA VoipNow displays this information only if the extensions are allowed to receive external calls.

Add a New Billing Plan

4PSA VoipNow offers the possibility of adding a new billing plan, which can be applied to client account creation.

> **Note**
>
> You can add new billing plans only if the permission `Billing Plan Management` has been activated for your account.

To add a new billing plan, click the Billing plans icon available in the Tools area in home page and follow the steps:

1. In the Billing Plan Management page, click the Add billing plan icon. A new page opens allowing you to enter information about the new billing plan.
2. The information is grouped in several sections:
   - Billing plan description
     - Name – Use the textbox to give a descriptive name to the billing plan.
       - Set as default billing plan - Select this checkbox located next to the Name textbox if you wish to set the billing plan as default for the new client accounts.

> **Note**
>
> When adding a new client account, if no billing plan is selected, the reseller's default billing plan is set as the billing plan for the new client account. The default billing plan cannot be deleted and a reseller must have only one default billing plan. If you set another billing plan as default, the old one is no longer considered default.

     - Allow incoming calls – When this option is enabled, the user is able to receive calls from extensions that belong to the system as well as from extensions outside the system.
     - Allow outgoing external calls – When this option is enabled, the user is able to make calls to extensions outside the server.
     - Allow outgoing local calls – When this option is enabled, the user is able to call extensions on the same client account.
     - Allow outgoing extended local calls – When this option is enabled, the user is able to call other extensions in the system.

> **Note**
>
> Some of the options described may not be present if the billing plan associated with your account does not permit them.

   - Charging policy
     - Billing plan types – 4PSA VoipNow offers two types of billing plans:
       a. Prepaid - The client will have a limited credit. Once the credit has been consumed, the client is no longer allowed to place or receive calls.

b. Postpaid - The client will pay a monthly fee which will include a predefined number of minutes. The minutes that exceed the included minutes will be charged after predefined rates.

- Limit for external outgoing calls – In order to prevent abuse, you can assign a money limit for the total costs of outgoing external calls. When the cost of the calls in a month exceeds this limit, the extensions will no longer be able to make calls to external destinations.

> **Note**
>
> This field is displayed only for `Postpaid` billing plans. The value in this field represents a *monthly* limit (i.e. the amount limits the total costs of the external outgoing calls registered in one month).

- Limit for external incoming calls – In order to prevent abuse, you can assign a money limit for the total costs of incoming external calls. When the cost of the calls in a month exceeds this limit, the extensions will no longer be able to receive calls from external numbers.

> **Note**
>
> This field is displayed only for `Postpaid` billing plans. The value in this field represents a *monthly* limit (i.e. the amount limits the total costs of the external incoming calls registered in one month).

- Available external outgoing minutes – {m} in time interval {T} - The outgoing minutes available on the account where the billing plan will be applied.

  You can use the [−] [+] buttons to remove/add available minutes for different time intervals.

  [−] removes the minutes corresponding to the selected time interval

  [+] adds another time interval to the billing plan

  You can add outgoing minutes blocks as long as you still have unused time intervals available.

> **Note**
>
> The `Available external outgoing minutes` field can be edited only if the `Allow outgoing external calls` setting was enabled in the previous section.

This field is displayed only for Postpaid billing plans. The value entered in this field represents a *monthly* limit (i.e. the number of minutes limits the total duration of the external outgoing calls registered in one month).

- External outgoing over usage – {multiplication_factor} x {m} included outgoing minutes + {m} minutes – The number of outgoing minutes the user can consume after having exceeded the available minutes in the time intervals.

  Note

  This field is displayed only for Postpaid billing plans. The value entered in this field represents a *monthly* limit (i.e. the number of minutes limits the total duration of the external outgoing calls registered in one month).

  On these billing plans you can set limits that exceed the limits of the billing plan currently associated with your account.

- Charging segments
  - Monthly charge – The monthly fee paid by the account owner that subscribes to the postpaid plan. This value is not actively used by 4PSA VoipNow, it has only billing purposes.

    Note

    This field is displayed only for Postpaid billing plans.

  - Initial outgoing credit – The credit offered to the client on account creation. This money can be used only for outgoing calls.

    Note

    This field is displayed only for Prepaid billing plans.

  - Initial incoming credit – The credit offered to the client on account creation. This money can be used only for incoming calls.

    Note

    This field is displayed only for Prepaid billing plans.

- Fees
  - Charge outgoing indivisible for the first {x} seconds – If an outgoing call lasts less than {x} seconds, the user will be charged the price corresponding to a {x} seconds call.

◦ Then charge every {y} seconds – 4PSA VoipNow computes the cost of an outgoing call every {y} seconds, if a call lasts more than the indivisible interval {x} set above.

◦ Charge external incoming indivisible for the first {w} seconds – If an external incoming call lasts less than {w} seconds, the user will be charged the price corresponding to a {w} seconds call.

◦ Then charge every {z} seconds – 4PSA VoipNow computes the cost of an external incoming call every {z} seconds, if a call lasts more than the indivisible interval {w} set above.

◦ Charge method – Two methods of charging calls are provided. They are mutually exclusive and must be used based on the system application.

> **Note**
>
> The external charge field can be disabled no matter what the charge method is, if the `Allow external calls` checkbox is disabled.

◦ Charge local calls – The charge for the calls made to extensions belonging to the same client account. Default: free of charge.

> **Note**
>
> Since the real cost of local calls is practically zero, you can choose to allow these calls free of charge. You cannot edit this field, if the `Allow outgoing local calls` checkbox is disabled.

◦ Charge extended local calls – The charge for the calls made to extensions that do not belong to the same client.

◦ Charge external incoming calls – The charge for the calls received from outside the system.

The external charges depend on the selected charging method: `charge fixed prices` and `charge relative to call cost`.

Charging fixed price – This method charges the same price for calls that are made in the same time interval. It does not take into consideration the real cost of the calls (i.e. the price charged by the channel provider or the call destination).

Charging relative to call costs – This method calculates the call costs by using the real amount charged by the channel provider, based on call destination. It uses the following cost function:

`n*call cost + adjustment`, where:

n and adjustment are parameters that can be set

The call cost variable depends on the user's level in the system hierarchy (i.e. system owner, reseller account owner, client account owner, extension account owner).

- If the billing plan is applied to a client, the call cost is the price paid by the reseller that owns the client account.
- If the billing plan is applied to an extension, the call cost is the price paid by the client that owns the extension account.

> **Caution**
>
> The fixed prices method does not take advantage of 4PSA VoipNow's capabilities to route calls through channels that offer the best cost. The fixed prices policy is risky especially for telephony resellers. If the fixed price is not chosen carefully, the reseller could end up paying to his/her provider a higher price than his clients pay him.

- Sound files
  - Play custom sound file when outgoing access is blocked – Select the sound file to play when the user tries to make a call and external calls are blocked due to billing constraints.

3. Click OK to add the new billing plan. Click Cancel to return to the previous page without adding the plan.

Edit a Billing Plan

When you edit a billing plan, you can make two types of changes:

- Edit the billing plan's details
- Edit the list of billing exceptions for area codes

> **Note**
>
> You can edit billing plans only if the permission `Billing Plan Management` has been activated for your account.

To edit the details of a billing plan, follow these steps:

1. Click the billing plan link that you want to edit.
2. A new page opens allowing you to modify the details, which are grouped in sections:

- Billing plan description – Use this section to modify general information about the billing plan.
- Charging policy – Use this section to change the number of outgoing minutes available in the time intervals as well as the over-usage minutes.
- Charging segments – Use this section to define the frequency of the charging operation during a call.
- Fees – Use this section to choose a different charging method and set the costs for local, extended local, external incoming and outgoing calls.
- Sound files – Use this section to change the sound files that will inform the caller that the call he is trying to make is blocked by the system.

> **Note**
>
> For more information on the fields in these sections, see the Add a New Billing Plan section.

3. Click OK to save the changes to the billing plan. Click Cancel to return to the previous page without saving the changes.

Manage Exception Costs

4PSA VoipNow allows the definition of exception costs that override the costs set up in the billing plan only for certain area codes. To edit the list of billing exceptions for area codes, follow these steps:

In the Billing plans table, click the icon. A new page opens allowing you to add, edit and remove billing exceptions manually, or upload cost files.

Add Costs

To add costs manually use the controls in the Add costs section.

When adding costs manually, the definition of the exception cost depends on the charging method set up in the billing plans details.

- When the billing plan's Charging method is Fixed prices 4PSA VoipNow displays the following controls:

  For calls to {area code}, description {description}

  {area code} – Use this textbox to specify the desired call destination.

  {description} - Use this textbox to give a brief description of the cost.

  Cost {indivisible cost} {currency} for the first {indivisible interval} seconds, then charge {cost} {currency} every {charging interval} seconds - Select the checkbox if you wish to define an exception cost for the calls from the respective area code.

{indivisible interval} – Use this textbox to set up a fixed cost that will be charged even if call duration is less than {indivisible interval}.

{currency} – This is the system currency, as set up in PBX preferences.

{indivisible interval} – Even if a call lasts less than {indivisible interval}, it will still be charged as if its duration were {indivisible interval}

{cost} – Use this textbox to set up a fixed cost of calls.

{charging interval} – Use this textbox to associate a time interval with the cost.

Free minutes every month from package {free minutes package} - Select the textbox if you wish to grant a free minutes package for the respective area code.

{free minutes package} - Use the available dropdown list to select a free minutes package.

- When the billing plan's Charging method is Relative to call costs 4PSA VoipNow displays the following controls:

For calls to {area code}, description {description}

{area code} – Use this textbox to specify the desired call destination.

{description} - Use this textbox to give a brief description of the cost.

Cost {n} x call cost + {adjustment} {currency} / {charging interval} seconds for call to {area code} - Select the checkbox if you wish to define an exception cost for the calls from the respective area code.

{n}, {adjustment} – Use these textboxes to set up the cost based on the real cost charged by the channel.

{currency} – This is the system currency, as set up in PBX preferences.

{charging interval} – Use this textbox to associate a time interval with the cost.

Free minutes every month from package {free minutes package} - Select the textbox if you wish to grant a free minutes package for the respective area code.

{free minutes package} - Use the available dropdown list to select a free minutes package.

Use the buttons to add several area code costs at the same time.

Click OK to add the cost(s) to the billing plan. Click Cancel to clear the Add costs section.

> **Note**
>
> You cannot add different costs for the same area code. 4PSA VoipNow displays an error message if you try to override an area code that is already in the exceptions list.

Upload Costs

To upload a cost file in CSV format use the controls in the Upload cost file section:

- Agree to replace ALL destination costs – Enable this checkbox to confirm the fact that the uploaded file will replace all the exception costs currently associated with the billing plan.
- Upload cost file – Click the Browse button to locate the CSV file on your computer.
- Field separator – Use this textbox to specify the character that separates the values in the CSV file. The default character is ',' (comma).

The entries in a cost file must be in the following format:

- If the charging method is Fixed prices: `{Area code},{Indivisible cost},{Indivisible interval},{Cost},{Charging interval}` or `{Area code},{Indivisible cost},{Indivisible interval},{Cost},{Charging interval},{Description}`

  Example of a valid entry: `021,1,60,0.20,10,Metropolitan`
- If the charging method is Relative to call cost: `{Area code},{n},{adjustment},{Charging interval}` or `{Area code},{n},{adjustment},{Charging interval},{Description}`

  Example of a valid entry: `021,1,0.20,60,Metropolitan`

Click OK to upload the file and replace the current exception costs. Click Cancel to clear the Upload cost file section.

Edit Costs

To edit costs manually, use the Current cost exceptions section.

- Click the Area code link corresponding to the cost you want to edit. A new page opens allowing you to change the cost as described in the previous step.

When the costs list is too long and you are searching for specific entries, you can use theSearch textbox to fill in the text you are looking for. Then click the button or the Search label to display only the costs whose area codes or descriptions contain the text. Click the Show all button to display the entire list.

The search criteria will be retained even if you navigate to other pages until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of reseller accounts in the system.

Another way to simplify the listing is to sort the reseller list by clicking a table header link. The order criteria are marked by the highlight of the table header where the arrow indicates the direction. The sort direction can be changed by another click on that header.

- Click OK to save your changes. Click Cancel to go back to the previous page without saving your changes.

Export Exception Costs

In 4PSA VoipNow you can export call cost exceptions in CSV format for sharing them among 4PSA VoipNow servers or for backup purposes.

Click the Export all exceptions link placed above the costs exceptions table. Then save the CSV file to the desired location.

Remove Exception Costs

To remove exception costs from the billing plan, in the current costs table select the checkboxes corresponding to the desired costs. Then click the Remove selected link. You will be asked to confirm the removal.

Manage Free Minutes Packages

To access the Free Minutes Packages management page, click the Manage Packages button located in the Tools section of the Billing Plans management page.

In the Free Minute Packages management page, all the existing packages are displayed in a table. The following information is available on each package:

Package name - The name of the package.

Free minutes - The number of free minutes included in the package.

Created - The date when the package was created.

To add a free minutes package, you have to specify the required information in the Add Package section at the top of the Free Packages management page:

Package name - Use this textbox to specify the name of the package.

Included minutes - Use this textbox to specify the number of free minutes included in the package.

Delete Billing Plans

You can access this page by clicking the Billing plans icon available in home page, in the Tools area.

Choose the billing plans you want to delete by selecting their corresponding checkboxes from the billing plan list. Then click the Remove selected link. You will be asked to confirm the removal. Check the Confirm the removal checkbox and then the OK button to delete the selected billing plans or Cancel to return to previous page without any change.

Note

You cannot remove billing plans that are currently used by clients or extensions on your account. 4PSA VoipNow automatically disables their corresponding checkboxes.

Note

You can delete billing plans only if the permission Billing Plan Management has been activated for your account.

Chapter 3

Manage Your Outgoing Routing Rules

Manage Your Outgoing Routing Rules

4PSA VoipNow allows clients to block certain outgoing calls, based on the time interval when the call was dialed and the Caller-ID of the system user that dialed the number.

View Your Outgoing Routing Rules

To access your routing rules, click the Outgoing routing rules icon available in the Tools area.

In the Outgoing Routing Rules Management page, you can view a list of the routing rule groups available in your account. The following operations can be performed:

- Add new routing rules.
- Replace existing routing rules.

4PSA VoipNow displays the following information on each group:

- S – The status of the group, displayed using an icon: Enabled or Disabled. Click this icon to change the status of the group.

> Note
>
> You cannot change the status of the groups that are currently included in billing plans.

- Name – The descriptive name of the outgoing routing rules group. Click this link to edit the group's details.
- Rules – The number of rules inside the rule group.
- Created – The date when the group was added to the system.

Search the Routing Rules Group List

When the routing rules group list is too long and you are searching for specific routing rules, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the routing rules whose name contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages, the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of routing rules group.

Another way to simplify the listing is to sort the routing rule group list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Add an Outgoing Routing Rules Group

To add outgoing routing rules to the system, click the Outgoing routing rules icon available in the Tools area, and follow these steps:

1. Click the Add outgoing routing rules icon available in the Tools area.

2. A new page opens allowing you to enter information about the routing rules group. The information is displayed in several sections:

   - Routing group management

     ◦ Name – Use this textbox to give a descriptive name to the outgoing routing rule group.

   - Add new outgoing routing rules – In this section you can find buttons, textboxes, and dropdown lists that allow you to define one or more routing rules for outgoing calls.

     The first dropdown list displays the available actions. On this level 4PSA VoipNow blocks the call to that number if the number is matched.

     Use the number textbox to match the number dialed by the extension user.

     > **Caution**
     >
     > Pay attention to the `number` entry. The number supports the Asterisk number matching system. You can enter an expression that matches multiple numbers. Remember that:
     >
     > X - matches any digit from 0-9
     >
     > Z - matches any digit form 1-9
     >
     > N - matches any digit from 2-9
     >
     > [] - matches any digit or letter in the brackets
     >
     > . - matches one or more characters
     >
     > * - matches 0, 1 or any number of the previous expression
     >
     > For example:
     >
     > ◦ Number 0. will match any number starting with 0.
     >
     > ◦ Number 1X[123]N will match any number starting with 1, followed by any digit between 0 and 9, followed by 1,2 or 3 and followed by any digit between 2 and 9.

     Use the third dropdown list labeled `if in time interval` to select the time interval when this rule applies.

     Use the textbox labeled `and coming from` to match the number of the extension where the call originates.

Note

You can specify any combination of the digits 0-9 and the characters '.' , '*'.

The number entry supports the Asterisk number matching. You can enter a basic regular expression containing:

any digit

* - matches 0, 1 or any number of the previous expression

. - matches one or more characters

Caution

The `Block` rule is final. This means that when the rule is matched, other rules are no longer checked.

3. Click `OK` to add the new routing group to the system. Click `Cancel` to go back to the previous page without adding the rule group.

Edit a Routing Rule Group

To edit the properties of an outgoing routing rule group, click the `Outgoing routing rules` icon available in the `Tools` area, and follow these steps:

1. In the `Outgoing Routing Rules Management` page, click the name of the group.
2. A new page opens allowing you to modify the details of the group. The information is displayed in several sections:
   - `Routing Group Management` – Use this section to rename the group.
     - `Name` – Use this textbox to give a descriptive name to the outgoing routing rule group.
     - `Agree to replace existing routing rules` – You can use this option to upload an `XML` file that was previously saved with the Save rules option.

Caution

4PSA VoipNow will delete from the database the selected group of rules and replace them with the uploaded rules.

The group of rules in the XML file must have the **same name** as the group in the interface. Otherwise, 4PSA VoipNow will not delete the current rules and ignore the uploaded file.

  - Upload rules – When the option Agree to replace existing routing rules is enabled, you can use the Browse button to locate the file containing the group of routing rules that you want to upload.

- Add new outgoing routing rules – Use this section to add new rules to the group.
- Existing rules – Use this section to review the existing rules, change their order in the group or remove rules from the group.

4PSA VoipNow displays the following information on each routing rule:

- S – The status of the rule, displayed using an icon: Enabled or Disabled. Click this icon to change the status of the rule.
- Action – The action performed when 4PSA VoipNow matches the number dialed by the user.
- Number – The number chosen to match the number dialed by the extension user.
- In time interval – The time interval when the rule will be executed.
- Coming from – The number of the extension where the call originated.

To remove routing rules from a group, follow the steps:

1. Choose the routing rules you want to delete by enabling their corresponding checkbox.
2. Click the Remove selected link. You will be asked to confirm the removal.

Save Outgoing Routing Rule Groups

4PSA VoipNow gives you the possibility to back-up and restore your routing rules. You can export routing rules to XML files and download them to your computer. You can later upload these files to the 4PSA VoipNow rules database. You can save either individual groups or all groups available in the 4PSA VoipNow system.

To save a specific group from the system onto your computer:

1. In the Outgoing Routing Rules Management page, click the name of the group you want to save.

2. A new page opens listing all the rules available in the group. Click the Save rules link.

To save all the groups currently available in your database, in the Outgoing Routing Rules Management page click the Save rules link.

Delete Outgoing Routing Rule Groups

To remove routing rule groups from the system, click the Outgoing routing rules icon in the Tools area. Next, choose the groups you want to delete by selecting their corresponding checkboxes in Outgoing Routing Rules Management page. Then click the Remove selected link. You will be asked to confirm the removal.

Note

You cannot remove routing rule groups that are used in the client's billing plans.

Chapter 4
Manage Your Clients

View the Clients List

In order to view the client list click the Clients link available in the left panel Navigation area. In the new page that opens you can view a list with all the clients in the system. Multiple operations can be performed on the client accounts:

- Add a new client to the system
- Search the existing clients
- Enable/Disable client accounts
- Enable/Disable control panel access for a client
- Manage individual client accounts
- Delete client accounts

4PSA VoipNow displays the following information on each client:

- S – The status of the client account displayed using an icon: Enabled or Disabled. Click this icon to change the status of the client.

> **Caution**
>
> If you disable an active client, all accounts belonging to that client are also disabled.

- A – This icon specifies if the client has permission to log in and use the 4PSA VoipNow interface: Allowed or Not allowed. Click this icon to change the permission.
- Client – The name of the client's account owner. Click this link to view more information about the client account.
- Company – The name of the owner's company.
- Created – The date when the client account was added to the system.
- Extensions – The number of extensions currently available in the client's account.
- R – Click the icon to view a short report on the client.

Search the Client List

When the client list is too long and you are searching for specific clients, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the clients whose names, companies or email addresses contain the text.
- Show all – Click this button or the Show all label to display the entire list.

The search criteria will be retained even if you navigate to other pages until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of client accounts in the system.

Another way to simplify the listing is to sort the client list by clicking a table header link. The order criteria are marked by the highlight of the table header where the arrow indicates the direction. The sort direction can be changed by another click on that header.

Add a New Client

A new client can be added only when some preliminary steps have been completed.

> **Note**
>
> You can add new clients only if the permission `Clients management` has been activated for his account.

1. If there is no billing plan in the system you must create one:
2. First, make sure that the time intervals you want to use for the billing plan are defined.
3. If you want to use another time interval, go to PBX link in the Navigation Area, click the Time intervals icon, and follow the instructions in the Add Time Intervals section.
4. After all time intervals have been created click the Clients-> Billing plans link and create a new billing plan as described in the Add a New Billing Plan section.
5. If you want the client to use another billing plan, click the Clients-> Billing plans link and create a new plan as described in the Add a New Billing Plan section.

After all preliminary steps have been completed, you can add a new client account by following these steps:

1. Click the Add client icon. A new page opens allowing you to enter the new client's details.
2. The information is grouped in several sections:
   - Client form
     - Create using template – Use the dropdown list to choose one of the available templates as a base for the new client. If you do not want to create the account based on a template, make sure the '--' option is selected.

Note

A template contains predefined settings that will be used to create the client. For more information on client templates, see the Manage Client Templates section.

- Company name
- Contact name
- Login
- Password – The password must be at least six characters long to be valid.
- Confirm Password
- Phone
- Fax
- Email
- Address
- City
- State/Province
- Postal/ZIP code
- Country
- Interface language – Use this dropdown list to choose the interface language for your account. The list contains all available languages.

Note

If you choose the `Default` option, the language that will be used for the client account interface is the one specified by the administrator.

- Client notes – Use this textbox to insert comments about the client account.

* Billing and outgoing call filtering
  - Billing plan – Use this dropdown list to choose one of the available billing plans that will apply to the new client account.
  - Outgoing routing group – Use this dropdown list to choose one of the outgoing routing rule groups you have previously defined. The purpose of this rule group is to restrict the outgoing calls placed by the extensions on the new client account.

3. The Select client permissions and limits checkbox allows you to specify what will the client be able to do in the system:

   - If you click OK, you will be directed to the next step: specifying the client's permissions and limits.

     > Note
     >
     > When you click OK information on the newly created account will be sent by email to the account owner (Contact person).

   - Uncheck the checkbox and click OK if you want to add the new client account without configuring its permissions. If you choose to set limitations later, skip steps 4 and 5.

     > Note
     >
     > A client that does not have his/her limitations and permissions set will have all permissions disabled and all limits set to 0. The account expiration date is unlimited.

   - Click Cancel to go back to the previous page without adding the client or OK to proceed.

4. A new page opens allowing you to change the account permissions and limits.

   - Permissions

     - Permissions and Limits Management - When this option is enabled, the client is able to change extension's permissions and limits.

     - Extension Management - When this option is enabled, the client is able to add and remove extensions on his/her account.

       > Note
       >
       > Even if this permission is disabled in client account, the respective client can edit the contact details of extensions.
       >
       > When you enable the Extension Management checkbox, 4PSA VoipNow automatically enables the Extension Features Management checkbox and makes it not editable.

     - Extension Feature Management - When this option is enabled, the client is able to enable/disable extensions on his/her account and edit all extension parameters. Without Extension Management option enabled, the client is not able to enable/disable Voicemail, Call recording and

Conference features on Phone terminal type extensions and change the queue size on Queue type extensions.

  - Phone extension SIP management – When this option is enabled, the client is allowed to use the provisioning features on his/her Phone Terminal Extensions. Additionally he/she can choose the Allowed codecs for the Phone Terminal extensions. For more information on this topic, see the Provisioning section.
  - Billing Plan Management – When this option is enabled, the client is able to add, remove or change billing plans parameters. These billing plans can be applied on his/her extension accounts and are used to charge the extensions.
  - Sound Management – When this option is enabled, the client is able to manage, add, remove or modify sound and music on hold files, folders and languages.
  - Phone Number Management – When this option is enabled, you is able to assign public phone numbers to clients and extensions from your own public phone numbers pool.
  - Call API Management - When this option is enabled, the client is able to manage the Call API permission for its extensions. For more information, please read the Call API section.

- Limits
  - Maximum number of phone extensions – Use the available textbox to specify the maximum number of extensions of type phone terminal in the client account. If you do not want to limit the number of phone terminals, select the `Unlimited` checkbox.
  - Maximum number of Queue extensions – Use the available textbox to specify the maximum number of extensions of type queue in the client account. If you do not want to limit the number of queues, select the `Unlimited` checkbox.
  - Maximum number of IVR extensions – Use the available textbox to specify the maximum number of extensions of type IVR in the client account. If you do not want to limit the number of IVRs, select the `Unlimited` checkbox.
  - Maximum number of Voicemail center extensions – Use the available textbox to specify the maximum number of extensions of type voicemail center in the client account. If you do not want to limit the number of voicemail centers, select the `Unlimited` checkbox.
  - Maximum number of Conference extensions – Use the available textbox to specify the maximum number of extensions of type

conference in the client account. If you do not want to limit the number of conference extensions, select the `Unlimited` checkbox.

- Maximum number of Callback extensions – Use the available textbox to specify the maximum number of extensions of type callback in the reseller account. If you do not want to limit the number of callback extensions, select the `Unlimited` checkbox. The maximum number of callback extensions in a reseller account limits the maximum number of extensions in each client account.
- Maximum number of Callback Caller-IDs - Use the available textbox to specify the maximum number of callback caller-IDs. If you do not want to limit the number of callback caller-IDs, select the `Unlimited` checkbox.
- Maximum number of Calling Card extensions – Use the available textbox to specify the maximum number of extensions of type calling card in the reseller account. If you do not want to limit the number of calling card extensions, select the `Unlimited` checkbox. The maximum number of calling card extensions in a reseller account limits the maximum number of extensions in each client account.
- Maximum number of Calling card Codes - Use the available textbox to specify the maximum number of calling card codes. If you do not want to limit the number of calling card codes, select the `Unlimited` checkbox.
- Maximum concurrent calls – Use the available textbox to limit the number of calls that can be active at the same time for any extension on the reseller's account. If you do not want to limit the client, select the `Unlimited` checkbox.
- Maximum concurrent text to speech – Use the available textbox to limit the number of calls that are allowed to use the text to speech application at the same time. If you do not want to limit the client, select the `Unlimited` checkbox.

> **Note**
>
> This option is available only if the system administrator has enabled the option `Allow text to speech` on the server.

- Maximum number of queue members – Use the available textbox to limit the number of agent extensions that can be added to a queue belonging to this client's account. If you do not want to limit the extension, select the `Unlimited` checkbox.

- Maximum number of mailboxes – Use the available textbox to specify the maximum number of extensions with voicemail option enabled in the client account. If you do not want to limit the number of mailboxes, select the Unlimited checkbox.

> **Note**
>
> This limit is imposed to client, reseller and administrator. When the limit is reached, all voicemail specific fields are disabled and the Help, available in the left frame, specifies the reason.

- Maximum size of a Voicemail mailbox – Use the available textbox to specify the maximum storage space for a Voicemail mailbox in the client account. If you do not want to limit the mailbox space, select the Unlimited checkbox.
- Maximum disk space for call recording – Use the available textbox to specify the maximum storage space reserved for call recordings in the client account. If you do not want to limit the disk space for call recording, select the Unlimited checkbox.
- Maximum disk space for sound files – Use the available textbox to specify the maximum storage space reserved for sound files. If you do not want to limit the disk space for sound files upload, select the Unlimited checkbox.
- Maximum disk space for fax files – Use the available textbox to specify the maximum storage space reserved for fax files. If you do not want to limit the disk space for fax files, select the Unlimited checkbox.
- Account expiration date – To specify when the client account becomes invalid, uncheck the Unlimited checkbox and provide a date using the textbox or the calendar button available.

> **Note**
>
> When a client account expires, all the extensions belonging to the account expire.

- Incoming phone number selection – Use the two lists to add or remove phone numbers to/from the client's phone number pool.
  - Available phone number – The list contains all available phone numbers in your account. To add a public phone to the client's phone number pool, select it from the Available phone numbers list and click the >>> Move button. You can select one or more items once.

- Assigned phone numbers – This list contains all phone numbers in client's phone number pool. To remove a phone number, select it from the Assigned phone numbers list and click the [<<<] Remove button. You can select one or more items once.

> **Note**
>
> This section is displayed only if one of the following conditions is fulfilled:
>
> - There are exclusive phone numbers available in your pool.
> - Your account has the `See Stacked Phone Numbers` permission enabled and there are stacked phone numbers available in the system pool.
>
> > **Note**
> >
> > Stacked phone numbers can be seen and used by resellers that have the `See Stacked Phone Numbers` permission enabled. Check with the system administrator for more information.

5. Click OK to set the permissions and limits for the new client. Click Cancel to add the client without saving the permissions and limits.

Edit Client's Details

To edit the details of a clients account, follow these steps:

1. In the home page, click the client's name link you want to modify.
2. Next, click the Edit client icon available in the Tools section.
3. A new page opens allowing you to edit details of the selected client account and its owner. The data is grouped in several sections:
   - Client form – Use this section to change the contact information of the account owner and the login username and password.
   - Billing – Use this section to choose another billing plan for this account.

> **Note**
>
> For more information on how to modify these fields, see the Add a New Client section.

4. Resend client contact details - Check this box if you want to resend contact details to the email address specified for the client account. The contact details will also be resent to the reseller who owns the client, as well as to the administrator of the system, if the appropriate parameters have been set in the PBX » Email templates page.

5. Click OK to save the changes to the account. Click Cancel to return to the previous page without saving the changes.

> **Note**
>
> You can edit client accounts only if the permission `Clients management` has been activated for your account. Resellers that do not have this permission can only edit the clients' contact details.

View Permissions and Limits

4PSA VoipNow allows you to view detailed information on the permissions and limits of a client account if you don't have Permissions and Limits Management permission. To access this information, follow the steps:

1. Click the chosen client name link in the home page.

2. Next, click the Client permissions and limits icon available in the Tools area. The next page contains the following sections.

   - Permissions – This section displays a set of permissions for extension management, sound management and so forth, allowed in the client account.

   - Limits – This section displays a set limitations for the maximum number of extensions, mailboxes and so forth, allowed in the client account. It also displays the expiration date for the client account.

     > **Note**
     >
     > For an explanation of these limits, see the Add a New Client.

   - Incoming phone number – In this section you can view the public phone numbers that the client is allowed to use for his/her extensions if the Phone Number Management permission is enabled.

Edit Permissions and Limits

The clients' permissions and limits can be modified based on the current account usage. For example, if a client has five extensions on his/her account the maximum number of extensions can only be set with values greater than five.

> **Note**
>
> You can edit the clients' permissions and limits only if the permission `Permissions and limits Management` has been activated for your account.

To modify the permissions and limits of a particular client, follow these steps:

1. Click the chosen client name link in the home page.
2. Next, click the Client permissions and limits icon available in the Tools area. The next page contains the following sections:
   - Permissions – This section allows you to enable or disable permissions such as extension and billing plan management, phone number management, etc.

     > **Note**
     >
     > For more information, please read the Add a New Client section.

   - Limits – This section allows you to set limitations for the maximum number of extensions, mailboxes, etc. allowed in the client account. It also allows you to set an expiration date for the client account.

     > **Note**
     >
     > For an explanation of these limits, read the Add a New Client section.

   - Incoming phone number selection – This section allows you to select the public phone number that the client is allowed to use for the extensions on his/her account if the `Phone Number Management` checkbox is enabled.

     > **Note**
     >
     > This section is displayed only if one of the following conditions is fulfilled:
     >
     > - There are exclusive phone numbers available in your pool.

- Your account has the `See Stacked Phone Numbers` permission enabled and there are stacked phone numbers available in the system pool.

  Note

  Stacked phone numbers can be seen and used by resellers that have the `See Stacked Phone Numbers` permission enabled. Check with the system administrator for more information.

- There are phone numbers available in the client's pool.

3. Click OK to save the changes to the account. Click Cancel to return to the previous page without saving the changes.

Group Operations

4PSA VoipNow allows you to edit the permissions and limits for several clients at the same time:

1. Choose the clients for whom you want to modify permissions and limits by selecting their corresponding checkboxes.
2. Click the Group Operations link. A new page opens containing the following sections:
   - Permissions – This section allows you to make changes on all clients' permissions. For each permission, you have the following options:
     - Do not change – When you choose this option, the corresponding permission is not modified for any of the clients you have selected.
     - Enable – When you choose this option, the corresponding permission is enabled for all the clients you have selected.
     - Disable – When you choose this option, the corresponding permission is disabled for all the clients you have selected.

   Note

   For an explanation of the different permissions, see the Add a New Client section.

   - Limits – This section allows you to make the same changes for all clients' limits – maximum number of extensions, mailboxes, etc. For each limit, you have the following options:

- Do not change – When you choose this option, the corresponding limit is not modified for any of the client accounts you have selected.
- Unlimited – When you choose this option, the corresponding limit is set to unlimited.
- Value – When you choose this option, the adjacent textbox is enabled; you must fill in a value that limits the corresponding feature value.
- Increase – When you choose this option, the adjacent textbox and dropdown list are enabled. Use the dropdown list to select the increase method: units or percent. Use the textbox to specify the number of units or the percent by which the corresponding limit is increased.
- Decrease – When you choose this option, the adjacent textbox and dropdown list is enabled. Use the dropdown list to select the decrease method: units or percent. Use the textbox to specify the number of units or the percent by which the corresponding limit is decreased.

> **Note**
>
> For an explanation of these limits, read the Add a New Client section.

3. Click OK to save the changes to the selected accounts. Click Cancel to return to the previous page without saving the changes.

Manage Client's Billing Limits

4PSA VoipNow 1.5 allows you to set billing limits when the client operates under a postpaid billing plan. Billing limits are a form of extra credit, a special offer made to a particular client.

> **Note**
>
> If the client operates under a prepaid plan, you can only offer *billing credits*.

View Client's Billing Limits History

4PSA VoipNow allows you to view detailed information about a client's billing limits. To access this information, follow these steps:

1. Click the chosen client name link in the Client Management page.

2. In the new page that opens, click the  Billing limits icon available in the Tools area.

The table with billing limits history contains the following columns:

- Incoming money limit – Displays the supplementary credit for external incoming calls.
- Outgoing money limit – Displays the supplementary credit for external outgoing calls.
- Overusage minutes – Displays the supplementary overusage minutes limit.
- Every month – Displays whether the limits are offered monthly or only for the current month.
- Order number – Displays the number of the request for allocating the new billing limits.
- Date added – Displays the date when the billing limits were enforced.

Add Limits to a Client Account

In this section of the page you can insert extra time and money limits to the client, by inserting digits in the following fields:

- Incoming money limit – Enter the amount of money which you want add to the limit for external outgoing calls that was initially set in this client's billing plan.
- Outgoing money limit – Enter the amount of money which you want to add to the limit for external incoming calls that was initially set in this client's billing plan.
- Overusage minutes – Enter the amount of minutes you want add to the external outgoing overusage minutes from this client's billing plan.
- Order number – Insert the identification number of the request for allocating these billing limits.
- These limits should be added every month - Enable this checkbox if you want to add these limits automatically every month.

Click OK to save your settings, or Cancel to go back to the previous page.

Delete Client Billing Limits

You can access this page from the Client Management page by clicking the chosen client name link and the Billing limits icon available in the next page.

To delete a billing limit from the displayed table, follow these steps:

- To delete a monthly billing limit, select its corresponding checkbox from the billing limits table and click the Remove selected link. You will be asked to confirm the removal. Enable the `Confirm the removal` checkbox and click the OK button to delete the selected billing limit, or Cancel to return to previous page without any change.
- You cannot delete a billing limit that is set for one month only. However, if you have made a mistake and you want to modify the limit you added, insert a new billing limit with a similar negative value (with a minus in front). Then click OK button to save the new setting, or Cancel to go back without making any changes.

> **Note**
>
> You can use this procedure to decrease the billing limit set for one month, by subtracting a smaller value, not an equal one.

Manage Client's Billing Credits

4PSA VoipNow 1.5 allows you to set billing credits when the client operates under a prepaid billing plan. You would access this page when the client needs to recharge its account.

> **Note**
>
> If the client operates under a postpaid plan, you can only offer *billing limits*.

View Client's Billing Credits History

4PSA VoipNow allows you to view detailed information about the history of recharges for the client's billing credit. To access this information, follow these steps:

1. Click the chosen client name link in the Client Management page.

2. In the new page that opens, click the Billing credits icon available in the Tools area.

The table with billing credits history contains the following columns:

- Incoming calls credit – Displays the supplementary credit for incoming calls.
- Outgoing calls credit – Displays the supplementary credit for outgoing calls.
- Order number – Displays the number of the request for allocating the new billing credits.
- Date added – Displays the date when the billing credits were enforced.

Add Credits to a Client Account

In this section of the page you can insert extra time and money limits to the client, by inserting digits in the following fields:

- Outgoing calls credit – Enter the amount of money with which you want to recharge this client's credit used for outgoing external calls.
- Incoming calls credit – Enter the amount of money with which you want to recharge this client's credit used for incoming external calls.
- Order number – Insert the identification number of the request for allocating the billing credits.

Click OK to save your settings, or Cancel to go back to the previous page.

Decrease Client Billing Credits

You can access this page from the Client Management page by clicking the chosen client name link and the Billing Credits icon available in the next page.

You cannot delete a billing credit. However, if you have made a mistake and you want to modify the credit you added, insert a new billing credit with a smaller negative value (with a minus in front). Then click OK button to save the new setting, or Cancel to go back without making any changes.

Manage Client's Billing Plans

View Client's Personal Billing Plan

4PSA VoipNow allows you to view detailed information about a client account's current billing plan. To access this information, follow these steps:

1. Click the chosen client name link in the home page.
2. In the new page that opens, click the Billing plans icon available in the Tools area.
3. Next, click the Client billing icon to view details about the prices charged for calls made by the extensions on the client account.
4. Depending on the billing plan type (prepaid or postpaid) and its settings, you can view one or more of the following sections:
   - Billing plan description
     - Billing plan name – The name of the billing plan for the client account
     - Billing plan type – The type of the billing plan for your account: prepaid or postpaid.
     - Allow incoming calls - Yes – 4PSA VoipNow displays this information only if the extensions on your account can receive calls from extensions that belong to the system as well as from extensions outside the system.
     - Allow outgoing external calls - Yes – 4PSA VoipNow displays this information only if the extensions on the client account can make calls to destinations outside the system.
     - Allow outgoing local calls - Yes – 4PSA VoipNow displays this information only if the extensions on the client account can call other extensions on the same client account.
     - Allow outgoing extended local calls - Yes – 4PSA VoipNow displays this information only if the extensions on the client account can call other extensions in the system (not on the same client account).
     - Monthly charge – The monthly fee paid by the client account owner

> **Note**
>
> This information is available only for postpaid billing plans.

◦ Remaining incoming calls credit – The amount currently available for incoming calls.

> **Note**
>
> This information is available only for prepaid billing plans.

◦ Remaining outgoing calls credit – The amount currently available for outgoing calls.

> **Note**
>
> This information is available only for prepaid billing plans.

◦ Incoming money limit – The supplementary credit for external incoming calls.

> **Note**
>
> This information is available only for postpaid billing plans.

◦ Outgoing money limit – The supplementary credit for external outgoing calls.

> **Note**
>
> This information is available only for postpaid billing plans.

◦ Initial incoming credit – The credit that was granted for incoming calls when your account was created.

> **Note**
>
> This information is available only for prepaid billing plans.

◦ Initial outgoing credit – The credit that was granted for outgoing calls when your account was created.

> **Note**
>
> This information is available only for prepaid billing plans.

- Available external outgoing minutes – Number of outgoing minutes available, per time interval. The number of outgoing minutes is displayed for each time interval included in the billing plan in the format:

{m} available external minutes in time interval {T}

The number of remaining minutes in current month is also displayed in format:

{m} remaining in {month}

> **Note**
>
> This information is available only for postpaid billing plans.
>
> 4PSA VoipNow displays this section only if the extensions on the client account can make calls to destinations outside the system.

- Outgoing calls charges – These are the charges applied to conversations after the user has exceeded the number of available minutes.
  - Local calls are charged {money unit} / second – The fee charged for calls between extensions on the same client account.

    > **Note**
    >
    > 4PSA VoipNow displays this information only if the extensions can call locally.

  If the charges for external calls are calculated using a fixed prices method, 4PSA VoipNow displays the costs for each time interval in the following format:

  - Calls made in time interval {T} are charged with {money unit} / second – The price charged for external calls made in time interval {T}.
  - Calls made outside these time intervals are charged {money unit} / second – The price charged for external calls made outside the time intervals specified above.

5. External incoming calls charges – These charges apply to calls received from outside the system.

> **Note**
>
> 4PSA VoipNow displays this information only if the extensions are allowed to receive external calls.

View Client's Billing Plan List

To view client's billing plans list click the chosen client name link in home page. Next, click the Billing plans icon available in Tools area.

In this page, you can view a list of all billing plans available in the client account. These billing plans can be applied to extensions on the client's account.

Multiple operations can be performed on billing plans:

- Add a new billing plan for the client account
- Search for specific billing plans
- Edit billing plans details
- Delete billing plans from the client account
- View client's billing plan

4PSA VoipNow displays the following information on each billing plan:

- S – The status of the billing plan, displayed using an icon: Enabled or Disabled. Click this icon to change the status of the billing plan.

> **Note**
>
> You can change the status of a billing plan only if it is not currently used by an extension belonging to the client account.

- I – The permission for incoming calls displayed using an icon: Allowed and free, Allowed and charged or Not allowed.
- O – The permission for external calls displayed using an icon: Allowed or Not allowed.
- L – The permission for local calls - calls between extensions that belong to the same client account; it is displayed using an icon: Allowed or Not allowed.
- E – The permission for extended local calls - calls between extensions that belong to different client accounts in the system; it is displayed using an icon: Allowed or Not allowed.
- Name – The descriptive name of the billing plan. Click the link to edit the details of the billing plan.
- Type – The type of the billing plan: prepaid or postpaid.

- **Monthly charge** – The monthly fee of the billing plan.
- **ExtOutCredit** – The credit limit for the external outgoing calls.
- **ExtInCredit** – The credit limit for external incoming calls.
- **Extensions** – The number of clients and extensions using the billing plan.
- **Created** – The date when the billing plan was created.
- **D** – Click the icon to view and edit the billing exceptions that override the costs set up in the billing plan.

> **Note**
>
> The default billing plan is displayed in bold characters.

Search the Billing Plan List

When the billing plan list is too long and you are searching for specific billing plans, you can use the following features:

- **Search** – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the plans whose fee or name fields contain the text.
- **Show all** – Click this button or the Show all label to display the entire list.

The search criteria will be retained even if you navigate to other pages until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of billing plans.

Another way to simplify the listing is to sort the billing plan list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

View a Billing Plan

4PSA VoipNow allows you to view detailed information about a billing plan in the client's billing plan list in case you don't have Billing Plans Management permission. To access this information, follow the steps:

1. Click the chosen client name link in the home page.
2. In the new page that opens, click the Billing plans icon available in the Tools area.
3. Next, click the name link of the billing plan you want to view.

   Depending on the billing plan type (prepaid or postpaid) and its settings, you can view one or more of the following sections:

   - Billing plan description
     - Billing plan name – The name of the billing plan for the extension account
     - Billing plan type – The type of the billing plan for your account: prepaid or postpaid.
     - Allow incoming calls - Yes – 4PSA VoipNow displays this information only if the extension can receive calls from extensions that belong to the system as well as from extensions outside the system.
     - Allow outgoing external calls - Yes – 4PSA VoipNow displays this information only if the extension can make calls to destinations outside the system.
     - Allow outgoing local calls - Yes – 4PSA VoipNow displays this information only if the extension can call other extensions on the same client account.
     - Allow outgoing extended local calls - Yes – 4PSA VoipNow displays this information only if the extension can call other extensions in the system (not on the same client account).
     - Monthly charge – The monthly fee paid by the extension account owner

       > **Note**
       >
       > This information is available only for postpaid billing plans.

     - Remaining incoming calls credit – The amount currently available for incoming calls.

       > **Note**
       >
       > This information is available only for prepaid billing plans.

     - Remaining outgoing calls credit – The amount currently available for outgoing calls.

> **Note**
>
> This information is available only for prepaid billing plans.

  - Incoming money limit – The supplementary credit for external incoming calls.

> **Note**
>
> This information is available only for postpaid billing plans.

  - Outgoing money limit – The supplementary credit for external outgoing calls.

> **Note**
>
> This information is available only for postpaid billing plans.

  - Initial incoming credit – The credit that was granted for incoming calls when your account was created.

> **Note**
>
> This information is available only for prepaid billing plans.

  - Initial outgoing credit – The credit that was granted for outgoing calls when your account was created.

> **Note**
>
> This information is available only for prepaid billing plans.

> **Note**
>
> 4PSA VoipNow displays only sections that are enabled in the billing plan applied on the client account.

- Available external outgoing minutes - Number of outgoing minutes available, per time interval. The number of outgoing minutes is displayed for each time interval included in the billing plan in the format:

  {m} available external minutes in time interval {T}

  The number of remaining minutes in current month is also displayed in format:

{m} remaining in {month}

> **Note**
>
> 4PSA VoipNow displays this section only if the extension can make calls to destinations outside the system.

- Outgoing calls charges – These are the charges applied to conversations
  - Local calls are charged {money unit} / second – The fee charged for calls between extensions on your account.

    > **Note**
    >
    > 4PSA VoipNow displays this information only if the extensions on the client account can call locally.

  If the charges for external calls are computed using a fixed price method, 4PSA VoipNow displays the costs for each time interval in the following format:

  - Calls made in time interval {T} are charged with {money unit} / second – The price charged for external calls made in time interval {T}.

  4PSA VoipNow displays the costs for the calls outside the time intervals specified above:

  - Calls made outside these time intervals are charged {money unit} / second – The price charged for external calls made in other time intervals.

4. External incoming calls charges – These charges apply to calls received from outside the system.

   > **Note**
   >
   > 4PSA VoipNow displays this information only if the extensions are allowed to receive external calls.

Add a New Billing Plan

You can access this page by clicking the chosen client name link in home page and the Billing plans icon available in the next page, in the Tools area. The billing plans created here can be used only for extensions that belong to the selected client.

To add a new billing plan to the client account, follow these steps:

1. Click the Add billing plan icon in Tools area.
2. A new page opens allowing you to enter information about the new billing plan. The information is grouped in several sections:

- Billing plan description
  - Name – Use the textbox to give a descriptive name to the billing plan.
    - Set as default billing plan - Select this checkbox located next to the Name textbox if you wish to set the billing plan as default for the new extension accounts.

      > **Note**
      >
      > When adding a new extension account, if no billing plan is selected, the client's default billing plan is set as the billing plan for the new reseller account. The default billing plan cannot be deleted and the client must have only one default billing plan. If you set another billing plan as default, the old one is no longer considered default.

  - Allow incoming calls – When this option is enabled, the user is able to receive calls from extensions that belong to the system as well as from extensions outside the system.
  - Allow outgoing external calls – When this option is enabled, the user is able to make calls to extensions outside the server.
  - Allow outgoing local calls – When this option is enabled, the user is able to call extensions on the same client account.
  - Allow outgoing extended local calls – When this option is enabled, the user is able to call other extensions in the system.

  > **Note**
  >
  > Some of the options described may not be present if the billing plan associated with the client account does not permit them.

- Charging policy
  - Billing plan types – 4PSA VoipNow offers two types of billing plans:

    a. Prepaid - The extension will have a limited credit. Once the credit has been consumed, the client is no longer allowed to place or receive calls.

b. Postpaid - The extension will pay a monthly fee which will include a predefined number of minutes. The minutes that exceed the included minutes will be charged after predefined rates.

- Limit for external outgoing calls – In order to prevent abuse, you can assign a money limit for the total costs of outgoing external calls. When the cost of the calls in a month exceeds this limit, the extension will no longer be able to make calls to external destinations.

  > **Note**
  >
  > This field is displayed only for `Postpaid` billing plans. The value in this field represents a *monthly* limit (i.e. the amount limits the total costs of the external outgoing calls registered in one month).

- Limit for external incoming calls – In order to prevent abuse, you can assign a money limit for the total costs of incoming external calls. When the cost of the calls in a month exceeds this limit, the extension will no longer be able to receive calls from external numbers.

  > **Note**
  >
  > This field is displayed only for `Postpaid` billing plans. The value in this field represents a *monthly* limit (i.e. the amount limits the total costs of the external incoming calls registered in one month).

- Available external outgoing minutes – {m} in time interval {T} - The outgoing minutes available on the account where the billing plan will be applied. You can use the buttons to remove/add available minutes for different time intervals.

  removes the minutes corresponding to the selected time interval

  adds another time interval to the billing plan

  You can add outgoing minutes blocks as long as you still have unused time intervals available.

  > **Note**
  >
  > The `Available external outgoing minutes` fields can be edited only if the `Allow outgoing external calls` setting was enabled in the previous section.

This field is displayed only for `Postpaid` billing plans. The value entered in this field represents a *monthly* limit (i.e. the number of minutes limits the total duration of the external outgoing calls registered in one month).

  - External outgoing over usage – {multiplication_factor} x {m} included outgoing minutes + {m} minutes – The number of outgoing minutes the user can consume after having exceeded the available minutes in the time intervals.

> **Note**
>
> This field is displayed only for `Postpaid` billing plans. The value entered in this field represents a *monthly* limit (i.e. the number of minutes limits the total duration of the external outgoing calls registered in one month).
>
> You can set on the client's billing plans limits that exceed the limits of the billing plan currently associated with the client account.

- Charging segments
  - Monthly charge – The monthly fee paid by the account owner that subscribes to the postpaid plan. This value is not actively used by 4PSA VoipNow, it has only billing purposes.

> **Note**
>
> This field is displayed only for `Postpaid` billing plans.

  - Initial outgoing credit – The credit offered to the extension on account creation. This money can be used only for outgoing calls.

> **Note**
>
> This field is displayed only for `Prepaid` billing plans.

  - Initial incoming credit – The credit offered to the extension on account creation. This money can be used only for incoming calls.

> **Note**
>
> This field is displayed only for `Prepaid` billing plans.

- Fees
  - Charge outgoing indivisible for the first {x} seconds – If an outgoing call lasts less than {x} seconds, the user will be charged the price corresponding to a {x} seconds call.

- **Then charge every {y} seconds** – 4PSA VoipNow computes the cost of an outgoing call every {y} seconds, if a call lasts more than the indivisible interval {x} set above.
- **Charge external incoming indivisible for the first {w} seconds** – If an external incoming call lasts less than {w} seconds, the user will be charged the price corresponding to a {w} seconds call.
- **Then charge every {z} seconds** – 4PSA VoipNow computes the cost of an external incoming call every {z} seconds, if a call lasts more than the indivisible interval {w} set above.
- **Charge method** – Two methods of charging calls are provided. They are mutually exclusive and must be used based on the system application.

> **Note**
>
> The external charge field can be disabled no matter what the charge method is if the `Allow external calls` checkbox is disabled.

- **Charge local calls** – The charge for the calls made to extensions belonging to the same client account. Default: free of charge.

> **Note**
>
> Since the real cost of local calls is practically zero, you can choose to allow these calls free of charge. You cannot edit this field if the `Allow outgoing local calls` checkbox is disabled.

- **Charge extended local calls** – The charge for the calls made to extensions that do not belong to the same client.
- **Charge external incoming calls** – The charge for the calls received from outside the system.
- **Charge external outgoing calls** – The charge applied to calls made in certain time intervals. For the calls outside these time intervals, 4PSA VoipNow charges the price defined in the `outside these intervals` textbox.

  The external charges depend on the selected charging method: `charge fixed prices` and `charge relative to call cost`.

  Charging fixed price – This method charges the same price for calls that are made in the same time interval. It does not take into consideration the real cost of the calls (i.e. the price charged by the channel provider or the call destination).

Charging relative to call costs – This method calculates the call costs by using the real amount charged by the channel provider, based on call destination. It uses the following cost function:

`n*call cost + adjustment`, where:

n and `adjustment` are parameters that can be set

the call cost variable depends on the user's level in the system hierarchy (i.e. system owner, reseller account owner, client account owner, extension account owner).

- If the billing plan is applied to a reseller, the call cost is the amount charged by the telephony channel.
- If the billing plan is applied to a client, the call cost is the price paid by the reseller that owns the client account.
- If the billing plan is applied to an extension, the call cost is the price paid by the client that owns the extension account.

> **Caution**
>
> The fixed prices method does not take advantage of 4PSA VoipNow's capabilities to route calls through channels that offer the best cost. The fixed prices policy is risky for telephony clients. If the fixed price is not chosen carefully, the client could end up paying to his/her provider a higher price than the extensions pay him.

3. Sound files
   - Play custom sound file when outgoing access is blocked – Select the sound file to play, when the user tries to make a call and external calls are blocked due to billing constraints.
4. Click OK to add the new billing plan. Click Cancel to return to the previous page without adding the plan.

Edit a Billing Plan

When you edit a billing plan, you can make two types of changes:

- Edit the billing plan's details
- Edit the list of billing exceptions for area codes

To edit the details of a client's billing plan, follow these steps:

1. Click the billing plan link that you want to edit.

2. A new page opens allowing you to modify the information, which is grouped in the following sections:

- Billing plan description – Use this section to modify general information on the billing plan.
- Charging policy – Use this section to change the number of outgoing minutes available in the time intervals as well as the over-usage minutes.
- Charging segments – Use this section to define the frequency of the charging operation during a call.
- Fees – Use this section to choose a different charging method and set the costs for local, extended local, external incoming and outgoing calls.
- Sound files – Use this section to change the sound files that will inform the caller that the call he is trying to make is blocked by the system.

> Note
>
> For more information on the fields in these sections, see the Add a New Billing Plan section.

3. Click OK to save the changes to the billing plan. Click Cancel to return to the previous page without saving the changes.

Manage Exception Costs

4PSA VoipNow allows the definition of exception costs that override the costs set up in the billing plan only for certain area codes. To edit the list of billing exceptions for area codes, follow these steps:

In the Billing plans table, click the icon. A new page opens allowing you to add, edit and remove billing exceptions manually, or upload cost files.

Add Costs

To add costs manually use the controls in the Add costs section.

When adding costs manually, the definition of the exception cost depends on the charging method set up in the billing plans details.

- When the billing plan's Charging method is Fixed prices 4PSA VoipNow displays the following controls:

  For calls to {area code}, description {description}

  {area code} – Use this textbox to specify the desired call destination.

  {description} - Use this textbox to give a brief description of the cost.

`Cost {indivisible cost} {currency} for the first {indivisible interval} seconds, then charge {cost} {currency} every {charging interval} seconds` - Select the checkbox if you wish to define an exception cost for the calls from the respective area code.

`{indivisible interval}` – Use this textbox to set up a fixed cost that will be charged even if call duration is less than {indivisible interval}.

`{currency}` – This is the system currency, as set up in PBX preferences.

`{indivisible interval}` – Even if a call lasts less than {indivisible interval}, it will still be charged as if its duration were {indivisible interval}

`{cost}` – Use this textbox to set up a fixed cost of calls.

`{charging interval}` – Use this textbox to associate a time interval with the cost.

`Free minutes every month from package {free minutes package}` - Select the textbox if you wish to grant a free minutes package for the respective area code.

`{free minutes package}` - Use the available dropdown list to select a free minutes package.

- When the billing plan's `Charging method` is `Relative to call costs` 4PSA VoipNow displays the following controls:

`For calls to {area code}, description {description}`

`{area code}` – Use this textbox to specify the desired call destination.

`{description}` - Use this textbox to give a brief description of the cost.

`Cost {n} x call cost + {adjustment} {currency} / {charging interval} seconds for call to {area code}` - Select the checkbox if you wish to define an exception cost for the calls from the respective area code.

`{n}`, `{adjustment}` – Use these textboxes to set up the cost based on the real cost charged by the channel.

`{currency}` – This is the system currency, as set up in PBX preferences.

`{charging interval}` – Use this textbox to associate a time interval with the cost.

`Free minutes every month from package {free minutes package}` - Select the textbox if you wish to grant a free minutes package for the respective area code.

`{free minutes package}` - Use the available dropdown list to select a free minutes package.

Use the buttons to add several area code cost at the same time.

Click OK to add the cost(s) to the billing plan. Click Cancel to clear the Add costs section.

> **Note**
>
> You cannot add different costs for the same area code. 4PSA VoipNow displays an error message if you try to override an area code that is already in the exceptions list.

Upload Costs

To upload a cost file in CSV format use the controls in the Upload cost file section:

- Agree to replace ALL destination costs – Enable this checkbox to confirm the fact that the uploaded file will replace all the exception costs currently associated with the billing plan.
- Upload cost file – Click the Browse button to locate the CSV file on your computer.
- Field separator – Use this textbox to specify the character that separates the values in the CSV file. The default character is ',' (comma).

The entries in a cost file must be in the following format:

- If the charging method is Fixed prices: `{Area code},{Indivisible cost},{Indivisible interval},{Cost},{Charging interval}` or `{Area code},{Indivisible cost},{Indivisible interval},{Cost},{Charging interval},{Description}`

  Example of a valid entry: `021,1,60,0.20,10,Metropolitan`
- If the charging method is Relative to call cost: `{Area code},{n},{adjustment},{Charging interval}` or `{Area code},{n},{adjustment},{Charging interval},{Description}`

  Example of a valid entry: `021,1,0.20,60,Metropolitan`

Click OK to upload the file and replace the current exception costs. Click Cancel to clear the Upload cost file section.

Edit Costs

To edit costs manually, use the Current cost exceptions section.

- Click the Area code link corresponding to the cost you want to edit. A new page opens allowing you to change the cost as described in the previous step.

When the costs list is too long and you are searching for specific entries, you can use theSearch textbox to fill in the text you are looking for. Then click the button or the Search label to display only the costs whose area codes or descriptions contain the text. Click the Show all button to display the entire list.

The search criteria will be retained even if you navigate to other pages until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of reseller accounts in the system.

Another way to simplify the listing is to sort the reseller list by clicking a table header link. The order criteria are marked by the highlight of the table header where the arrow indicates the direction. The sort direction can be changed by another click on that header.

- Click OK to save your changes. Click Cancel to go back to the previous page without saving your changes.

Export Exception Costs

In 4PSA VoipNow you can export call cost exceptions in CSV format for sharing them among 4PSA VoipNow servers or for backup purposes.

Click the Export all exceptions link placed above the costs exceptions table. Then save the CSV file to the desired location.

Remove Exception Costs

To remove exception costs from the billing plan, in the current costs table select the checkboxes corresponding to the desired costs. Then click the Remove selected link. You will be asked to confirm the removal.

Manage Free Minutes Packages

To access the Free Minutes Packages management page, click the Manage Packages button located in the Tools section of the Billing Plans management page.

In the Free Minute Packages management page, all the existing packages are displayed in a table. The following information is available on each package:

Package name - The name of the package.

Free minutes - The number of free minutes included in the package.

Created - The date when the package was created.

To add a free minutes package, you have to specify the required information in the Add Package section at the top of the Free Packages management page:

Package name - Use this textbox to specify the name of the package.

Included minutes - Use this textbox to specify the number of free minutes included in the package.

Delete Billing Plans

You can access this page by clicking the chosen client name link in home page and the Billing plans icon available in the next page.

Choose the billing plans you want to delete by selecting their corresponding checkboxes from the list. Then click the Remove selected link. You will be asked to confirm the removal. Check the Confirm the removal checkbox and then the OK button to delete the selected billing plans or Cancel to return to previous page without any change.

> **Note**
> You cannot remove billing plans that are currently used by extensions on the client account. 4PSA VoipNow automatically disables their corresponding checkboxes.

Call API

Call API is a multi-threaded proxy server for 4PSA VoipNow. It is designed to handle communication with the VoipNow servers and to act as a point of contact for applications. Call API supports multiple input/output formats, including Standard, XML, CSV, and HTTP, HTTPS and SSL.

To access the Call API Preferences page, click the Call API button in the respective client's management page.

Allow call API on this server - Select this checkbox to allow connections to Call API from the respective 4PSA VoipNow server.

Total access call API password - Use the available textbox to specify the password for total access to call API.

Confirm call API password - Use the available textbox to confirm the password for total access to call API.

Preferred call API agent - Select the agent that you will use for call API. Selecting a different agent than the one you use may lead to unexpected behavior. Select NONE if you intend to send direct commands to call API

Manage Client's Outgoing Routing Rules

4PSA VoipNow allows clients to block certain outgoing calls, based on the time interval when the call was dialed and the Caller-ID of the system user that dialed the number.

View Client's Outgoing Routing Rules

To access client's routing rules, click the name of the client in the Client Management page, and then click the Outgoing routing rules icon available in the Tools area.

In the Outgoing Routing Rules Management page, you can view a list of the routing rule groups available in the client account. The following operations can be performed:

- Add new routing rules.
- Replace existing routing rules.

4PSA VoipNow displays the following information on each group:

- S – The status of the group, displayed using an icon: Enabled or Disabled. Click this icon to change the status of the group.

> **Note**
>
> You cannot change the status of the groups that are currently included in billing plans.

- Name – The descriptive name of the outgoing routing rules group. Click this link to edit the group's details.
- Rules – The number of rules inside the rule group.
- Created – The date when the group was added to the system.

Search the Routing Rules Group List

When the routing rules group list is too long and you are searching for specific routing rules, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the routing rules whose name contain the text.

- **Show all** – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages, the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of routing rules group.

Another way to simplify the listing is to sort the routing rule group list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Add an Outgoing Routing Rules Group

To add outgoing routing rules to the system, click the name of the client in the Client Management page, and then click the **Outgoing routing rules** icon available in the Tools area, and follow these steps:

1. Click the **Add outgoing routing rules** icon available in the Tools area.
2. A new page opens allowing you to enter information about the routing rules group. The information is displayed in several sections:
   - **Routing group management**
     - **Name** – Use this textbox to give a descriptive name to the outgoing routing rule group.
     - **Agree to replace existing routing rules** – You can use this option to upload an XML file that was previously saved with the [Save rules] option.

> **Caution**
>
> 4PSA VoipNow will delete from the database the selected group of rules and replace them with the uploaded rules.
>
> The group of rules in the XML file must have the **same name** as the group in the interface. Otherwise, 4PSA VoipNow will not delete the current rules and ignore the uploaded file.

◦ Upload rules – When the option Agree to replace existing routing rules is enabled, you can use the Browse button to locate the file containing the group of routing rules that you want to upload.

- Add new outgoing routing rules – In this section you can find buttons, textboxes, and dropdown lists that allow you to define one or more routing rules for outgoing calls.

  Use the first dropdown list to choose the Block action.

  4PSA VoipNow blocks the call to that number if the number is matched.

  Use the number textbox to match the number dialed by the extension user.

> **Caution**
>
> Pay attention to the `number` entry. The number supports the Asterisk number matching system. You can enter an expression that matches multiple numbers. Remember that:
>
> X - matches any digit from 0-9
>
> Z - matches any digit form 1-9
>
> N - matches any digit from 2-9
>
> [] - matches any digit or letter in the brackets
>
> . - matches one or more characters
>
> * - matches 0, 1 or any number of the previous expression
>
> For example:
>
> ◦ Number 0. will match any number starting with 0.
>
> ◦ Number 1X[123]N will match any number starting with 1, followed by any digit between 0 and 9, followed by 1,2 or 3 and followed by any digit between 2 and 9.

Use the third dropdown list labeled `if in time interval` to select the time interval when this rule applies.

Use the textbox labeled `and coming from` to match the number of the extension where the call originates.

> **Note**
>
> You can specify any combination of the digits 0-9 and the characters '.' , '*'.
>
> The number entry supports the Asterisk number matching. You can enter a basic regular expression containing:

any digit

* - matches 0, 1 or any number of the previous expression

. - matches one or more characters

Caution

The Block rule is final. This means that when the rule is matched, other rules are no longer checked.

3. Click OK to add the new routing group to the system. Click Cancel to go back to the previous page without adding the rule group.

Edit a Routing Rule Group

To edit the properties of an outgoing routing rule group, click the name of the client in the Client Management page, and then click the Outgoing routing rules icon available in the Tools area, and follow these steps:

1. In the Outgoing Routing Rules Management page, click the name of the group.
2. A new page opens allowing you to modify the details of the group. The information is displayed in several sections:
   - Routing Group Management – Use this section to rename the group.
   - Add new outgoing routing rules – Use this section to add new rules to the group.
   - Existing rules – Use this section to review the existing rules, change their order in the group or remove rules from the group.

   4PSA VoipNow displays the following information on each routing rule:

- S – The status of the rule, displayed using an icon: Enabled or Disabled. Click this icon to change the status of the rule.
- Action – The action performed when 4PSA VoipNow matches the number dialed by the user.
- Number – The number chosen to match the number dialed by the extension user.
- In time interval – The time interval when the rule will be executed.
- Coming from – The number of the extension where the call originated.

To remove routing rules from a group, follow the steps:

1. Choose the routing rules you want to delete by enabling their corresponding checkbox.
2. Click the Remove selected link. You will be asked to confirm the removal.

Save Outgoing Routing Rule Groups

4PSA VoipNow gives you the possibility to back-up and restore your routing rules. You can export routing rules to XML files and download them to your computer. You can later upload these files to the 4PSA VoipNow rules database. You can save either individual groups or all groups available in the 4PSA VoipNow system.

To save a specific group from the system onto your computer:

1. In the Outgoing Routing Rules Management page, click the name of the group you want to save.
2. A new page opens listing all the rules available in the group. Click the Save rules link.

To save all the groups currently available in your database, in the Outgoing Routing Rules Management page click the Save rules link.

Delete Outgoing Routing Rule Groups

To remove routing rule groups from the system, click the Outgoing routing rules icon in the Client Management page, in the Tools area. Next, choose the groups you want to delete by selecting their corresponding checkboxes in Outgoing Routing Rules Management page. Then click the Remove selected link. You will be asked to confirm the removal.

Note

You cannot remove routing rule groups that are used in the client's billing plans.

Manage Client's Time Intervals

View Client's Time Intervals

Time intervals can only be seen by the users who created them. Other system users can only see the properties of time intervals directly associated with their account; for example if a user has been created with a billing plan that uses a time interval, he will be able to see that time interval's properties.

You can access this page by clicking the chosen client name link in the home page and the Time intervals icon available in the next page, in the Tools area.

You can view a list of all available time intervals on the client account. You can also perform several operations on these time intervals:

- Add a new time interval
- Search for a specific time interval
- Edit an existing time interval
- Delete time intervals

4PSA VoipNow displays the following information about each time interval:

- T – This icon specifies the method used to define the time interval:
  - Individual days method
  - Interval method

> **Note**
>
> For more information on the two approaches used for describing a time interval, see the Manage Your Time Intervals section.

- Name – The descriptive name of the time interval. Click this link to edit the time interval information.
- Hours – The hours used as limits for the time slot
- Weekdays – The days of the week used as limits for the time slot
- Month Days – The month period when the time interval applies
- Month – The month when the time interval applies
- Created – The date when the time interval was created

Note

When a client account is added to the system, 4PSA VoipNow automatically creates a time interval named `Full month` that covers the entire month.

Search the Interval List

When the time intervals list is too long and you are searching for specific time intervals, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the time intervals whose name, hours, weekdays or dates contain the text.
- Show all – Click this button or the `Show all` label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the `Number of entries per page` link. The number of entries per page is shown in the left side of the table along with the total number of time intervals.

Another way to simplify the listing is to sort the time interval list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Add a New Time Interval

Time intervals are used on call filtering, call routing, billing plans, etc. Whenever a new account is created, the extension must have a billing plan associated to its account. The extension can be charged differently based on the call time interval.

To add a new time interval, click the chosen client name link in the home page. Next, click the Time intervals icon available in the Tools area and follow these steps:

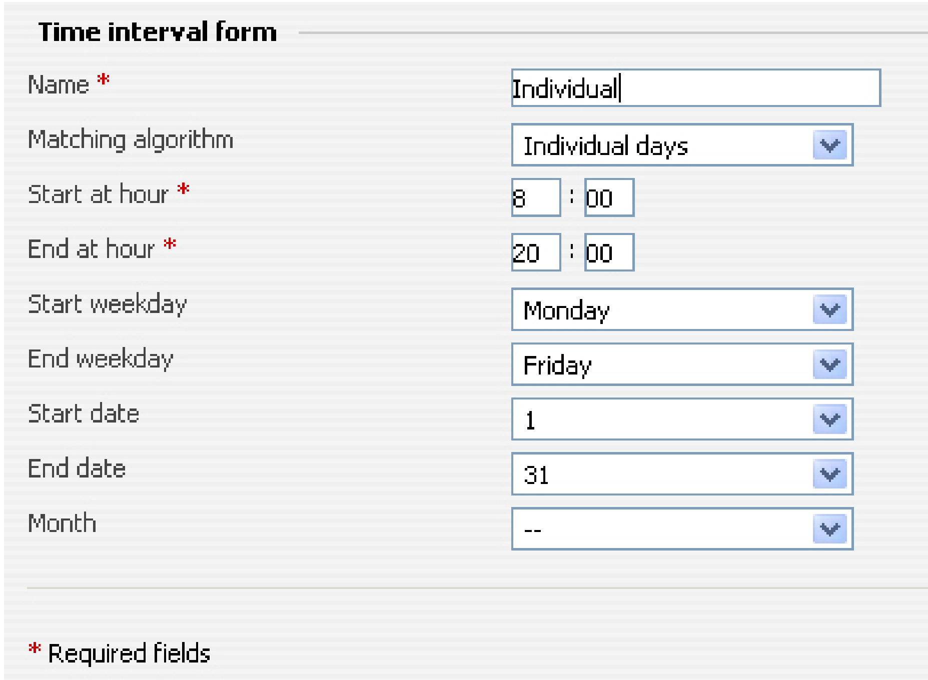
1. Click the Add time intervals icon. A new page opens allowing you to enter information on the new time interval.
   - Name – Use the textbox to fill in a descriptive name to identify the time interval.

- **Matching algorithm** – A time interval can be described in two ways:
  - **Individual days** – This method allows 4PSA VoipNow to match the same time interval in different days. See the example below.
  - **Interval** – This method allows 4PSA VoipNow to match a continuous time interval that extends over several days. See the example below.
- **Start at hour** and **End at hour** – Use the available textboxes to specify the hours that limit the time slot.
- **Start weekday** and **End weekday** – Use these dropdown lists to select the days of the week that define the time slot.
- **Start date** and **End date** – Use these dropdown lists to select the days of the month that define the time slot.
- **Month** - Use this dropdown list to select the month that defines the time slot.

2. Use the buttons to add several time intervals at the same time.
   - removes the corresponding `Time interval`
   - adds another `Time interval`
3. Click **OK** to add the new time interval(s). Click **Cancel** to go back to the previous page without adding the interval(s).

Example of a time interval defined in individual days

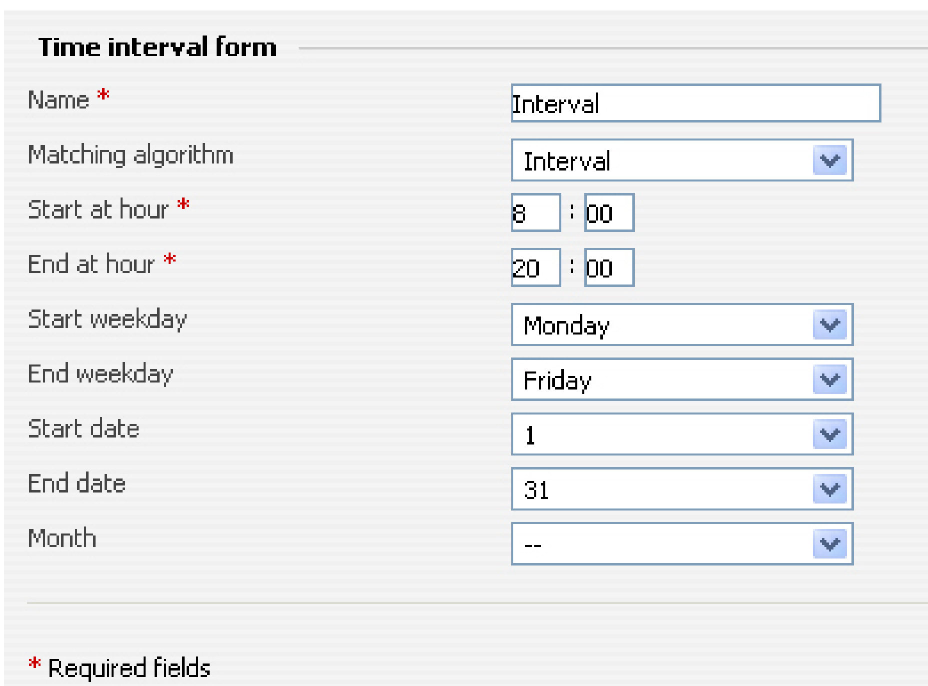
In the time interval below, 4PSA VoipNow matches calls made or received between the hours `8:00 – 20:00` on Monday, Tuesday, Wednesday, Thursday, and Friday between `1` and `31` every month.



A time interval defined in individual days

Example of a continuous time interval

In the time interval below, 4PSA VoipNow matches calls made or received between Monday, 8:00 and Friday, 20:00, between 1 and 31 every month.



A continuous time interval

Edit a Time Interval

To access this page, click the chosen client name link in the home page. Next, click the Time intervals icon available in the Tools area and follow these steps:

1. In the time interval list, click the name link of the time interval you want to change.
2. A new page opens where you can rename the time interval and modify its start/end hours, days, dates. You can also change the matching algorithm.

   > **Note**
   >
   > For more information on these fields, see the Add a New Time Interval section.

3. Click OK to save the changes to the time interval. Click Cancel to return to the previous page without saving the changes.

Delete Time Intervals

To delete a client's time intervals click the client name link in the home page and the Time intervals icon available in the next page.

Choose the time intervals you want to delete by checking the corresponding checkbox in the time interval list. Then click the Remove selected link. You will be asked to confirm the removal.

> **Note**
>
> Time intervals can be removed only if they are not currently used.

Manage Client's Extension Templates

View Client's Extension Template List

Extension templates are useful when adding new extension accounts that have similar permissions, limits, and billing plans. Instead of entering each time the extension's permissions and limits, you can choose an extension template from a list. However, if some of the data in the template does not meet your requirements, you can check the Select extension permissions and limits checkbox and edit them.

When creating an extension, the administrator can select extension templates from his/her own template list or from the client's extension template list.

When creating an extension, the client can select extension templates from his/her own templates list.

To access this page, click the chosen client name link in the home page. In the new page that opens, click the Extension templates icon available in the Tools area.

In the Extension Template Management page, you can view a list of all extension templates available on the client account. Multiple operations can be performed:

- Add a new extension template to the client account
- Search existing extension templates
- Edit an extension template
- Delete extension templates from the client account

4PSA VoipNow displays the following information about each extension template on the client account:

- Template name – The name of the extension template. Click this link to edit the extension template.
- Extension type – The type of extension created by this template, which can be: Phone terminal, Queue, Voicemail Center, Conference.
- Extensions – The number of extensions that have been created based on this template. Click this link to view the list of extensions based on this template.

Search the Client's Extension Template List

When the extension template list is too long and you are searching for specific extension templates, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the extension templates whose names contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the `Number of entries per page` link. The number of entries per page is shown in the left side of the table along with the total number of extension templates.

Another way to simplify the listing is to sort the extension template list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Add a New Extension Template

To access this page, click the chosen client name link in the home page. Next, click the Extension templates icon available in the Tools area and follow the steps:

1. In the client's Extension Template Management page, click the Add extension template icon.
2. A new page opens allowing you to enter information on the new extension template. The settings are grouped in several sections:
   - Extension template form
     - Name – Use this textbox to provide a descriptive name for the template.
   - Permissions – Use this section to set the permissions of the extension account owners.
     - Extension is multi user aware - This option allows the extension to see the other extensions on the same client account and to access the functions that forward calls to other extensions, like call forwarding, transfer, ring-all, etc.

       > **Note**
       >
       > The `Extension is multi-user aware` option is available for phone terminal extensions only. Other extension types MUST be multi-user aware by design because otherwise they cannot serve their purpose.

     - Sound management - When this option is enabled, the extension is able to manage, add, remove, or modify sound and music on hold files, folders, and languages.

- Phone extension SIP Management - When this option is enabled, the extension user is allowed to use the provisioning features on his/her Phone Terminal Extensions. Additionally he/she can choose the Allowed codecs for the Phone Terminal extensions. For more information on this topic, see the Provisioning section..

> **Note**
>
> The `Phone extension SIP management` option is available for phone terminal extensions only.

- Limits – Use this section to set the limits of the extension account owners.
  - Maximum disk space for sound files – Use the available textbox to specify the maximum storage space reserved for sound files. If you do not want to limit the disk space for sound files upload, select the `Unlimited` checkbox.
  - Maximum concurrent calls– Use the available textbox to limit the number of external calls that can be active at the same time. If you do not want to limit the extension, select the `Unlimited` checkbox.

> **Note**
>
> The `Maximum concurrent calls` option is available for phone terminal extensions only. Both incoming and outgoing calls are counted.

  - Maximum concurrent text to speech – Use the available textbox to limit the number of calls that are allowed to use the text to speech application at the same time. If you do not want to limit the extension, select the `Unlimited` checkbox.

> **Note**
>
> This option is available only if the administrator enabled it.

  - Maximum number of queue members – Use the available textbox to limit the number of agents that can be added to the queue.

> **Note**
>
> The `Maximum number of queue members`option is available for Queue extensions only.

- Account expires in {d} days – Use this section to set the number of days until the expiration date for the extension account, starting with the extension creation.

- Extension type selection – Use this section to choose the type of extension that will be created using this template.
- Billing plan – Use this section to choose the billing plan associated with the extension and/or to offer the extension extra minutes after exceeding its over-usage limits.

> **Note**
>
> If you do not select a billing plan, the client's default billing plan will be used for the new extension account.

3. Based on the extension type you have selected for the template, one or more additional sections are available, allowing you to configure the specific settings.
4. Click OK to add the new extension template. Click Cancel to go back to the previous page without adding the template.

Edit Extension Templates

To access this page, click the client name link in the home page. Next, click the Extension templates icon available in the Tools area and follow these steps:

1. In the client's extension template list, click the name link of the extension template you want to change.
2. A new page opens where you can view and edit the settings of the selected extension template. The information is grouped in several sections:
   - Extension template form – Use this section to rename the client's extension template.
   - Permissions – Use this section to change the permissions of the extension account owners.
   - Limits – Use this section to change the limits of the extension account owners.
   - Extension type selection – Use this section to change the type of the extension that will be created with this template.

- Billing plan – Use this section to change the billing plan for the extension and/or to modify the extra minutes for the extension, provided after exceeding its over-usage limit.

> **Note**
>
> For more information on permissions and limits, see the Edit Permissions and Limits section.

3. Based on the type you have selected for your template, one or more additional sections are available allowing you to configure the specific settings.
4. Click OK to save the changes to the client's extension template. Click Cancel to return to the previous page without saving the changes.

> **Note**
>
> When you modify a template, the accounts already created using the respective template will not be affected!

Delete Extension Templates

To delete extension templates, click the chosen client name link in the home page. Next, click the Extension templates icon available in the Tools area.

In the client's Extension Template Management page, choose the extension templates you want to delete by selecting their corresponding checkboxes. Then click the Remove selected link. You will be asked to confirm the removal.

> **Note**
>
> When you delete a template, the accounts that have already been created using this template will not be affected!

Manage Client's Sounds

View Client's Sound List

There are two types of sounds: music on hold and announcement sounds.

Music on hold sound files are played when a caller is on hold waiting for someone to answer his/her call. These sound files are not language specific because they are usually melodies. Music on hold files can only be uploaded, not recorded over the phone.

An announcement sound is played when the user is notified on an event or when information is requested from the user. These sounds have different files for different languages, so that a user can listen to the sound version according to his/her language preferences. If the files in the requested language do not exist, the default files will be played. This type of sound can be either uploaded or recorded over the phone.

An announcement sound can be shared or non-shared. When the sound is shared, it is also available to lower level account owners (like extension levels). The non-shared sound is available in client context only.

To access the client's sound page, click the chosen client name link in the home page. A new page opens containing button links to all specific client operations. Next, click on the Sounds icon available in the Tools area.

Note

The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

In the Sound Management page, you can view a list of the sounds available in the client account. You can also perform multiple operations:

- Add and delete sounds from the client account
- Search for specific sounds in the client account
- Organize sound files by using sound languages and sound folders

4PSA VoipNow displays the following information about each sound:

- S – The status of the sound, displayed using an icon: Enabled and Disabled. Click the icon to change the sound's status.
- T – The type of the sound, displayed using an icon:
    - specifies a Shared sound (available to all accounts belonging to the same user)
    - specifies a User sound (available only to the user who created it)
- M – This field describes the purpose of the file by using an icon:

- specifies an Announcement sound
- specifies a Music on hold sound

- Name – The name of the sound. Click this link to edit the sound.
- Folder – The folder where the sound is located in the system.
- Languages – The number of languages for which this sound is defined.

> **Note**
> If the sound is used as Music on hold, this field displays '-'.

- Modified – The date when the sound was last modified.

Search the Sound List

When the sound list is too long and you are searching for specific sounds, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the sounds whose names contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of sounds.

Another way to simplify the listing is to sort the sound list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Add a New Sound

To access this page, click the chosen client name link in home page. A new page opens containing button links to all specific client operations. Next, click the Sounds icon available in the Tools area.

> **Note**
>
> The **Sounds** section is available only if the `Sound Management` permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

A user can add a new sound associated to the chosen client account only if the client has sound languages available. On client creation the default sound language is added to the client account. When there are no sound languages, click the Sound languages icon and follow the instructions from [Add a New Language] section to add new languages.

To add a new sound to the client account, follow these steps:

1. Click the Add sound icon available in the Tools area.
2. A new page opens allowing you to enter information about the new sound:
   - Sound form
     - Name – The descriptive name for the sound
     - This is music on hold – Use this checkbox to specify the purpose of the sound. When this option is selected, the sound can be played to a caller that is on hold. Otherwise, the sound is used for announcement purposes only.
     - This is a shared sound – When this option is enabled, all the client's extensions and accounts are able to view and use this sound.
     - Folder – Use this dropdown list to select the folder where the sound will be stored.
   - Record over the phone
     - I want to record sound over the phone – When this option is enabled, 4PSA VoipNow allows you to record the sound file over the phone rather than uploading it.
   - Upload sound files
     - Filename – Click the Browse button to locate the sound file on your computer and upload it.

     > **Note**
     >
     > 4PSA VoipNow accepts the following extensions for sound files: `.mp3`, `.wav`, `.gsm` and `.raw`.

If you are creating an announcement sound (i.e. the checkbox `This is music on hold` is not enabled), the following options are available:

- `Language` – Use this dropdown list to specify the language of the sound file uploaded in the system.
- `Default sound file` – When this option is enabled, the file is set as default for the sound. The default file is played for the callers with a phone language that is unavailable for the sound.

  For example, let's assume you have created a sound that announces callers that the extension user is on holiday. You have added versions of the announcement in English, French, and Dutch and set the English file as default. The English sound version will be played to any caller that has other phone language set.

> **Note**
>
> Each sound object must have one default sound file associated. When uploading several sound files at the same time, make sure you select only one default file. Otherwise, 4PSA VoipNow displays an error message.

3. You can use the buttons to remove/add versions of the sound in different languages.
   - removes the `Upload sound` section
   - adds another `Upload sound files` section
4. Click `OK` to add the new sound. Click `Cancel` to go back to the previous page without adding the sound.

Edit Sound Options

To access this page and edit the information on an existing sound click the chosen client name link in the home page. Next, click the `Sounds` icon available in the `Tools` area. In the new opened page you can modify the properties of a sound.

Note

The **Sounds** section is available only if the `Sound Management` permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

For example, you can:

- Add and delete files containing versions of the sound for different languages
- Change the shared flag of an announcement sound.

To edit the properties of a sound from the client account, follow these steps:

1. Click the name link of the sound you want to modify.
2. A new page opens allowing you to change the details of the sound. The content of this page depends on the purpose of the sound: `announcement` or `music on hold`.

   If the sound is an announcement sound, the information is grouped in the following sections:

   - `Sound form` – Use this section to:
     - Change the sound's type in shared (available to all 4PSA VoipNow users belonging to the user that created the sounds) by clicking `This is a shared sound`. Otherwise, the sound is of user type and can only be used in the client context.
     - Record sound file over the phone
   - `Upload sound files` – Use this section to upload files containing versions of the sound in different languages.

   Note

   When you upload a sound file associated with a language that already exists, 4PSA VoipNow replaces the old file with the new version. Before this operation is performed, 4PSA VoipNow asks you to confirm the replacement.

   Use the buttons to remove/add versions of the sound in different languages.

     - removes the corresponding `Upload sound files` section

◦ + adds another Upload sound files section

To manage the existing sound files associated with an announcement sound, follow the steps:

1. Click the name link of the sound you want to modify.
2. A new page opens allowing you to view a detailed list of the existing files. In the Existing sounds section, 4PSA VoipNow displays the following information about each file:
   - Filename – The name of the file. Click this link to download file on your computer.
   - Sound file size – The size of the file in Kb
   - Folder – The folder where the file is located
   - Language – The language associated with the sound file

   > **Note**
   >
   > The default sound file of the sound object is displayed in **bold** format.

3. Click OK to save your changes. Click Cancel to go back to the previous page without changing the sound.

Search the File List

When the file list is too long and you are searching for specific sound files, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the sound files whose names contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of sound files in the system.

Another way to simplify the listing is to sort the sound file list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Remove Files

Choose the files you want to delete by selecting their corresponding checkboxes. Then click the Remove selected link. You will be asked to confirm the removal.

> **Note**
>
> Default sound files cannot be deleted. You must replace a default sound file.

Manage Client's Sound Folders

In the Sound Folder Management page, you can view a list of the sound folders available in the client's account. Multiple operations can be performed:

- Add a new sound folder
- Delete sound folders and their content
- Search for specific folders

To access the client's sound folders page, click the chosen client name link in the home page. Next, click the Sounds icon available in Tools area and the Folders icon.

> **Note**
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

4PSA VoipNow displays the following information about each folder:

- Folder name – The name of the sound folder
- Sound files – The number of sounds stored in the folder. Click this link to open a new page listing these sounds.
- Created – The date when the folder was added to the system

Search the Folder List

When the time folder list is too long and you are searching for specific time intervals, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the folders whose names contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of sound folders in the system.

Another way to simplify the listing is to sort the sound folder list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Add a New Sound Folder

Each time you add new sound files in the system you must choose the folder name where you want them to be stored. If you want to store a sound in a specific folder, other than the ones already existent, you can add a new sound folder before adding sound files.

Follow the steps described below to add a new sound folder for a specific client:

1. Click the chosen client name link in the home page.
2. Next, click the Sounds icon in the Tools area and the Folder icon.

> **Note**
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

3. In the Sound Folder management page, click the Add folder icon.

4. A new page opens allowing you to enter the name of the new folder. Use the available textbox to name the new folder.
5. Use the buttons to add several folders at the same time.
   - adds a new folder input textbox
   - removes the corresponding textbox
6. Click OK to add the new sound folder(s). Click Cancel to go back to the previous page without adding the folder(s).

Delete Sound Folders

To remove sound folders from a client's account along with the sound files inside, click the chosen client name link in the home page. Next, click the Sounds icon available in the Tools area and then the Folder icon.

> **Note**
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

A new page opens displaying all the sound folders available on the client account.

To delete sound folders follow these steps:

1. Choose the folders you want to delete by selecting their corresponding checkboxes.
2. Click the Remove selected link. A new page opens displaying the list of folders and the sounds located in the folders that will be deleted.

   > **Caution**
   >
   > When you delete a folder, you also delete all the sounds located in that folder.

3. Review the list. If you want to proceed with the removal, select the Confirm the removal checkbox and click OK. Otherwise click Cancel to return to the previous page without any removal.

> **Note**
>
> If the sounds inside the folder are currently used, these sounds cannot be deleted. The folder that contains them cannot be deleted either.

Manage Client's Sound Languages

View the Language List

A sound file can be recorded in several languages so that the extension can listen to the specified announcement in his chosen language if available in the system. If the extension's language does not exist, the announcement will be played in the default sound language.

In the Sound Language Management page, you can view a list of the languages available on the client's account. Multiple operations can be performed:

- View a detailed list of the system languages
- Add a new sound language
- Search for specific languages
- View the sounds that have files in different languages
- Delete sound languages from the system

To access Sound Languages Management page for a specific client, click the chosen client name link in the home page. Next, click the Sounds icon available in the Tools area.

> **Note**
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

In the new page that opens click the Sound languages icon.

4PSA VoipNow displays the following information on each sound language:

- Language name – The name of the language.
- Sound files – The number of sound files in this language. Click this link to view the list of sound files.
- Created – The date when the language was added to the system.

Search the Language List

When the language list is too long and you are searching for specific languages, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the languages whose names contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of sound languages in the system.

Another way to simplify the listing is to sort the sound language list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Add a New Language

To add a new sound language, click the chosen client name in the home page. Next, click the Sounds icon available in the Tools area.

> **Note**
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

In the new page that opens click the Sound languages icon and follow the steps:

1. In the Sound Language Management page, click the Add Sound Language icon.
2. A new page opens allowing you to enter the name of the new sound language. Use the dropdown list to add one of the available languages to the client's account.
3. Use the buttons to add several languages at the same time.
   - adds another dropdown list so you can create another language

- removes the corresponding dropdown list

4. Click OK to add the new sound language(s). Click Cancel to go back to the previous page without adding the language(s).

Edit Language Details

To change the details of a sound language, click the chosen client name link in the home page. Next, click the Sounds icon available in the Tools area.

> **Note**
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

In the new page that opens click the Sound languages icon and follow these steps:

1. Click the name link of the language you want to modify.
2. A new page opens in which you can use the Name dropdown list to choose another name for the language.
3. Click OK to save your changes. Click Cancel to return to the previous page without renaming the language.

Delete Sound Languages

To remove sound languages from a specific client account, click the chosen client name link in the home page. Next, click the Sounds icon available in the Tools area.

> **Note**
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

In the new page that opens click the Sound languages icon and follow the steps:

1. Choose the languages you want to delete by selecting their corresponding checkboxes.
2. Click the Remove selected link. A new page opens displaying the list of languages and their associated sounds that will be deleted.
3. Review the list. If you want to proceed with the removal, select the Confirm the removal checkbox and click OK. Otherwise click Cancel to return to the previous page without deleting anything.

Delete Sounds

To delete sounds in a specific client account, click the chosen client name link in the home page. Next, click the Sound icon available in the Tools area.

Note

The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

Choose the sounds you want to delete from the sound list by selecting their corresponding checkboxes. Then click the Remove selected link. You will be asked to confirm the removal.

You cannot remove sounds that are currently used.

You cannot remove music on hold sounds if the following conditions are met:

- the folder where the sound is located is used
- the sound is the only one left in the folder

View Client Report

In this page, you can view statistics about the number of objects (accounts, sounds, billing plans, active calls etc) currently available in a selected client account.

To access this page, click the chosen client name link in the home page. Next, click the Report icon available in the Tools area. The information is displayed in several sections:

- Account overview – This section displays the number of accounts in the system and their status.
  - Total extensions - Total number of extension accounts for the selected client
  - Enabled extensions - The number of enabled extensions accounts for the selected client
  - Suspended extensions - The number of disabled extensions accounts for the selected client
  - Registered extensions - The number of phone terminal extensions logged in
  - Phone terminals - The total number of phone terminals in the client account
  - Queues - The total number of queues in the client account
  - IVRs - The total number of IVRs in the client account
  - Voicemail Centers - The total number of voicemail center extensions in the client account
  - Conferences - The total number of conference extensions in the client account
  - Callbacks– The total number of Callback extensions on the server
  - Calling Cards– The total number of Calling Card extensions on the server
- Sound files overview
  - Total sounds – The total number of shared and personal sounds in the system. The sounds owned by the logged in user and the sounds owned by users belonging to the logged in user are counted.
  - Shared sounds – The total number of shared sounds. Shared sounds can be used by all 4PSA VoipNow users belonging to the user that added the sound.
  - Personal sounds – These sounds can be used only be the user that created them.
- Music on hold overview
  - Total music on hold files – The number of music on hold files for the selected client
  - Personal music on hold files – The number of system music on hold files, owned by the selected client
  - Personal music on hold folders – The number of music on hold folders, owned by selected client

- Billing plans overview
  - Reseller level billing plans – The number of billing plans created by the reseller
  - Client level billing plans – The number of billing plans created by the reseller's clients
- System usage overview
  - Call cost for {month}, {year} – The total cost of the calls made by the extensions in the client account
  - Outgoing time spent on {month}, {year} – The total time spent in outgoing calls in current month
  - Incoming time spent on {month}, {year} - The total time spent in incoming calls in current month
  - Maximum outgoing time spent – The maximum time spent in outgoing calls by the extensions belonging to the selected client and the month when this happened
  - Maximum incoming time spent – The maximum time spent in incoming calls by extensions belonging to the selected client and the month when this happened
  - Minimum outgoing time spent – The minimum time spent in outgoing calls by extensions belonging to the selected client and the month when this happened
  - Minimum incoming time spent – The minimum time spent in incoming calls by extensions belonging to the selected client and the month when this happened
  - Public phone numbers cost – The sum of monthly costs associated the public phone numbers used by the client's extensions.
- Disk space overview
  - Disk space for sounds – The disk space used by sound and music on hold files
  - Total disk space – The total disk space used by sound files, music on hold files, voicemail messages and conversation recordings.

Manage Client's Custom Buttons

4PSA VoipNow allows your clients to customize the functionality of the control panel by adding custom buttons linked to specific URLs.

In the Custom buttons page you can:

- View the list of custom buttons defined on the client account
- Add new custom buttons to the client account
- Edit the settings of the existing custom buttons
- Delete custom buttons from the client account

To access this page, in the left panel click the PBX link. In the PBX options section of the new page that opens, click the icon.

View the Custom Buttons List

In the Custom buttons page you can view the following details about existing custom buttons:

- S – The status of the button displayed using an icon: Enabled or Disabled.
- A – The availability of the button
- L – The location of the button: means that the button is displayed in the left panel and means that the button is placed in the right panel.
- I – The icon associated with the button

> **Note**
>
> If the button is associated with the default icon, 4PSA VoipNow displays

- Label – The label displayed under the button's icon
- Url – The URL linked with the button
- Priority – A value that defines the order in which buttons are displayed in the interface

Add a New Custom Button

To add a new custom button to the client account, follow these steps:

1. In the Custom buttons page click the icon. A new page opens listing the parameters associated with the new button.
2. Use the following settings to define the look and behaviour of the button:

- Label – Use this textbox to fill in the label displayed under the button's icon.
- Title – Use this textbox to specify the tip that will be displayed when the mouse is positioned on the button's icon.
- Location – Use this dropdown list to choose where the button will be displayed:
- Default image for all skins – When this option is enabled, 4PSA VoipNow displays a default icon for the button. If you disable this checkbox, 4PSA VoipNow displays additional controls that allow you to load custom icons for the button:
  - Use the Browse button to locate an graphic file on your computer.
  - Enable the checkbox corresponding to the skin where the icon will be used.
  - Enable the All skins checkbox if you want to use the same icon for all the 4PSA VoipNow skins installed on the server.
  - You can use the buttons to add icons for different skins at the same time.
- Include reseller id – When this option is selected, 4PSA VoipNow appends the id of the currently selected reseller to the URL linked with the button.
- Include client id – When this option is selected, 4PSA VoipNow appends the id of the currently selected client to the URL linked with the button.
- Include extension id – When this option is selected, 4PSA VoipNow appends the id of the currently selected extension to the URL linked with the button.
- Include extension internal number – When this option is selected, 4PSA VoipNow appends the internal number of the currently selected extension to the URL linked with the button.
- Include extension public number – When this option is selected, 4PSA VoipNow appends the public phone number of the currently selected extension to the URL linked with the button.
- Include billing plan – When this option is selected, 4PSA VoipNow appends the id of the currently selected reseller to the URL linked with the button.
- Priority – The value in this textbox defines the order in which the custom buttons are displayed in the interface.

- Url – Use this textbox to fill in the url that will opened when the button is clicked.
- Context help – Use this textbox to specify the text that will be displayed in the left panel when the mouse is positioned on the button's icon.
- Inheritance level – Use this dropdown list to specify the visibility of the button:
    - 0 – The button is visible only on the client account.
    - 1 – The button is visible only to the client account and the accounts of his/her extensions.
- Action – Use this dropdown list to choose if the url will be opened in the:
    - Current window or
    - New window

3. Click OK to create the button. Click Cancel to go back to the previous page without adding the button to the system.

Edit Custom Buttons

To edit the parameters associated with a custom button, in the custom buttons list click the name of the chosen button. In the new page that opens use the available controls to change the current settings. For more information see Add a new Custom Button

Delete Custom Buttons

To delete one or more custom buttons, in the custom buttons list enable the checkboxes corresponding to the desired checkboxes. Then click the Remove selected link. You will be asked to confirm the removal of the buttons.

Impersonate

This feature allows you to view the interface from a client's perspective.

In the respective client's management page click the  Impersonate button located in the Tools area.

> **Note**
>
> The **Impersonate** feature can only be used for users that are enabled and also have control panel access. When you try to use **Impersonate** for a user that is disabled or doesn't have control panel access, 4PSA VoipNow will display the following warning message:
>
> `You cannot use impersonate on a user that is disabled or doesn't have control panel access.`

To return to normal view mode, just click the Return to my account link located in the left panel navigation area.

Delete Clients

To delete client accounts from the system, follow these steps:

1. Choose the clients you want to delete by selecting their corresponding checkboxes in the home page.
2. Click the Remove selected link. A new page opens displaying the list of extensions associated with the client account. These extensions will be removed as well.
3. Review the list. If you want to proceed with the removal, select the `Confirm the removal` checkbox and click `OK`. Otherwise click `Cancel` to return to the previous page without deleting anything.

> **Note**
>
> You can delete client accounts only if the permission `Clients management` has been activated for your account.

Chapter 5

Manage Your Clients' Extensions

View Client's Extension List

4PSA VoipNow offers two ways of accessing an extension account and performing operations, as shown below:

1. By following the Extensions link available in the left panel Navigation area. In the Extension Management page, 4PSA VoipNow displays a list with all the extensions registered in the system. To view a certain extension account, click on the extension name link of your choice.
2. By following the Clients link available in the left panel Navigation area. Click the chosen client name link. The next page displays the list of extensions on the client account.

Both ways allow the user to perform the same operations on an extension account, the only difference being that in the second one the reseller has access to all extensions of a specified client while in the first the reseller views all the extensions in the system along with their corresponding client. The manual describes in detail the first way mentioned above.

Multiple operations can be performed on the client's extension account:

- Add a new extension
- Manage features for existing extensions
- View billing plans and call costs for existing extensions
- Delete extensions from the client account

To access a client's extension list, click the chosen client name link in the home page or search for extensions of the respective client in the Extension Management page.

Note

In the **Extension Management** page, 4PSA VoipNow displays the name of the client account where each extension is located in the **Client** column.

In the client's account page, 4PSA VoipNow displays the following information about each extension:

- S – The status of the extension, displayed using an icon: Enabled or Disabled. Click this icon to change the status of the extension.
- A – The permission to access the Control Panel displayed using on icon: Enabled or Disabled. Click this icon to change the permission of the extension.
- T – The type of the extension displayed using an icon: Phone terminal, Queue, Interactive Voice Response (IVR), Voicemail center, Conference, Callback, Calling Card.
- Extension – The extension contact name and number displayed in the format Contact_Name(Client_ID*Local_Extension_Number). Click this link to go to the extension context.
- State – This field specifies if the extension has a phone terminal connected.
- Public phone number – The public phone number assigned to the extension. If the extension has several phone numbers associated, 4PSA VoipNow displays the number selected for the setting Use the following Caller-ID (for more information, see Edit Permissions and Limits). If there is no public phone number 4PSA VoipNow displays '-'.
- Created – The date when the extension was added to the system

Search the Extension List

When the extensions list is too long and you are searching for specific extensions, you can use the following features:

- Extension type filter – Use this dropdown list to display just the extensions of a certain type.
- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the extensions whose extension number, Caller-ID, owner name, company and email contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages the search criteria and filter will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of extensions.

Another way to simplify the listing is to sort the extension list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Express License Restriction

Express license allows access and management to Phone Terminal extensions only. All other extension types already existent in the system maintain their functions unchanged and can therefor be used. For example, the system allows to define routing rules with transfer to an existent queue.

View an Extension Overview

The extension overview can be seen in the extension account. The information displayed depends on the extension type.

Phone Terminal Overview

- Extension type – The type of the extension, in this case Phone Terminal

- **Your phone terminal login** – The login you must use on your phone terminal in order to login to the server. The password is either identical with the extension account password either set up in the **Phone authentication** section of the extension features page (see Phone Terminal Extension).
- **Public phone number(s)** – If one or more public phone numbers are assigned to the extension, they will be displayed here with their corresponding monthly costs (e.g. `49932040495 (10.1 USD)`). Otherwise, 4PSA VoipNow displays '-'.
- **Extension internal number** – The internal phone number of the extension in 4PSA VoipNow – The phone number assigned when the extension was added to the system
- **Extension Terminal** – If the extension is registered to the system, the terminal advertised by the extension
- **Extension State** – The state of the extension, from the network connection perspective
- **Extension IP address** – The IP address of the extension registered to the system
- **Extension registered** – The date and time when the extension registered to the system
- **Billing plan** – The billing plan assigned with the extension with its monthly fee
- **Calls cost** – The cost of the calls in current month
- **Outgoing time spent on** – The total duration of outgoing calls and the total number of calls in current month
- **Incoming time spent on** – The total duration of incoming calls and the total number of calls in current month
- **Number of voicemail messages** – The total number of voicemail messages recorded
- **Number of fax messages** – The total number of fax messages and the disk space used by these.
- **Number of recorded conversations** – The total number of recorded calls
- **Number of sound files** – The total number of sound files and the disk space used by these.

Queue Overview

- **Extension type** – The type of the extension, in this case **Queue**

- **Public phone number(s)** – If one or more public phone numbers are assigned to the extension, they will be displayed here with their corresponding monthly costs (e.g. 49932040495 (10.1 USD)). Otherwise, 4PSA VoipNow displays '-'.
- **Extension internal number** – The internal phone number of the extension in 4PSA VoipNow – The phone number assigned when the extension was added to the system
- **Billing plan** – The billing plan assigned with the extension with its monthly fee
- **Calls cost** – The cost of the calls in current month
- **Outgoing time spent on** – The total duration of outgoing calls and the total number of calls in current month
- **Incoming time spent on** – The total duration of incoming calls and the total number of calls in current month
- **Total agents** – Total number of agents assigned to the queue
- **Queue supervisors** – The number of supervisors for the queue
- **Registered agents** – How many agents are registered to the queue
- **Number of sound files** – The total number of sound files and the disk space used by these

Interactive Voice Response (IVR) Overview

This type of extension allows the creation of an interactive menu that can be used by callers to get information without having to connect to a human operator.

- **Extension type** – The type of the extension, in this case IVR
- **Public phone number(s)** – If one or more public phone numbers are assigned to the extension, they will be displayed here with their corresponding monthly costs (e.g. 49932040495 (10.1 USD)). Otherwise, 4PSA VoipNow displays '-'.
- **Extension internal number** – The phone number assigned when the extension was added to the system
- **Billing plan** – The billing plan assigned with the extension with its monthly fee
- **Calls cost** – The cost of the calls in current month
- **Outgoing time spent on** – The total duration of outgoing calls and the total number of calls in current month
- **Incoming time spent on** – The total duration of incoming calls and the total number of calls in current month

- **Number of sound files** – The total number of sound files and the disk space used by these

Voicemail Center Overview

This type of extension is similar to the voicemail function of the phone terminal extension. However the voicemail center allows callers to verify their messages by using a terminal located outside the system.

- **Extension type** – The type of the extension, in this case Voicemail center
- **Public phone number(s)** – If one or more public phone numbers are assigned to the extension, they will be displayed here with their corresponding monthly costs (e.g. 49932040495 (10.1 USD)). Otherwise, 4PSA VoipNow displays '-'.
- **Extension internal number** – The phone number assigned when the extension was added to the system
- **Billing plan** – The billing plan assigned with the extension with its monthly fee
- **Calls cost** – The cost of the calls in current month
- **Outgoing time spent on** – The total duration of outgoing calls and the total number of calls in current month
- **Incoming time spent on** – The total duration of incoming calls and the total number of calls in current month
- **Number of sound files** – The total number of sound files and the disk space used by these

Conference Overview

This type of extension allows the creation of conferences that can be accessed by system users as well as external callers.

- **Extension type** – The type of the extension, in this case Conference
- **Public phone number(s)** – If one or more public phone numbers are assigned to the extension, they will be displayed here with their corresponding monthly costs (e.g. 49932040495 (10.1 USD)). Otherwise, 4PSA VoipNow displays '-'.
- **Extension internal number** – The phone number assigned when the extension was added to the system
- **Billing plan** – The billing plan assigned with the extension with its monthly fee

- Calls cost – The cost of the calls in current month
- Outgoing time spent on – The total duration of outgoing calls and the total number of calls in current month
- Incoming time spent on – The total duration of incoming calls and the total number of calls in current month
- Number of sound files – The total number of sound files and the disk space used by these

Callback Overview

This type of extension allows system users to call this extension from a phone connected to the public network and then place an outgoing call through the 4PSA VoipNow server.

- Extension type – The type of the extension, in this case Callback
- Public phone number(s) – If one or more public phone numbers are assigned to the extension, they will be displayed here with their corresponding monthly costs (e.g. 49932040495 (10.1 USD)). Otherwise, 4PSA VoipNow displays '-'.
- Extension internal number - The phone number assigned when the extension was added to the system.
- Billing plan - The billing plan assigned with the extension with its monthly fee.
- Calls cost - The cost of the calls in current month.
- Outgoing time spent on - The total duration of outgoing calls and the total number of calls in current month.
- Incoming time spent on - The total duration of incoming calls and the total number of calls in current month.
- Number of sound files - The total number of sound files and the disk space used by these.

Calling Card Overview

This type of extension allows the implementation of a calling card system on the 4PSA VoipNow server.

- Extension type - The type of the extension, in this case Calling Card
- Public phone number(s) - If one or more public phone numbers are assigned to the extension, they will be displayed here with their

corresponding monthly costs (e.g. 49932040495 (10.1 USD)). Otherwise, 4PSA VoipNow displays '-'.

- Extension internal number - The phone number assigned when the extension was added to the system.
- Billing plan - The billing plan assigned with the extension with its monthly fee.
- Calls cost - The cost of the calls in current month.
- Outgoing time spent on - The total duration of outgoing calls and the total number of calls in current month.
- Incoming time spent on - The total duration of incoming calls and the total number of calls in current month.
- Number of sound files - The total number of sound files and the disk space used by these.

Impersonate Overview

This feature allows you to view the interface from an extension's perspective. Click the respective extension's name in the Extensions Management page and then click the Impersonate button located in the Tools area.

> Note
>
> The **Impersonate** feature can only be used for users that are enabled and also have control panel access. When you try to use **Impersonate** for a user that is disabled or doesn't have control panel access, 4PSA VoipNow will display the following warning message:
>
> `You cannot use impersonate on a user that is disabled or doesn't have control panel access.`

To return to normal view mode, just click the Return to my account link located in the left panel navigation area.

Add a New Extension

To add a new extension account on a specific client, click the Add extension icon available in Extension Management page, in the Tools area.

> **Note**
>
> You can add extensions only if the permission `Extension Management` has been activated for his account.

Next, select a client account and proceed with the following steps:

1. Before adding a new extension check for billing plans in the client account. If no billing plan corresponds to the one you want the extension to subscribe to, add another one as described in the Add a New Billing Plan section.
2. The information is grouped in several sections:
   - Extension setup
     - Number – The value in this field is generated automatically and it represents the lowest extension number in the client account that is not currently used. To specify a different extension number, use the textbox to enter the number you want.

       > **Note**
       >
       > The length of the extension number is based on the administrator's preference. This number is the so-called local extension number. It can be used to access extensions on the same client account.

       > **Caution**
       >
       > 4PSA VoipNow displays an error message if you try to assign a number defined as a `forbidden number`. Forbidden numbers are reserved numbers defined by the system administrator.

   - Extension owner – Fill in details about the person that will be using the extension and his/her login.
     - Create using template – Use the dropdown list to choose one of the available templates as a base for the new extension. If you do not want to create the account based on a template, make sure the '--' option is selected.

       > **Note**
       >
       > A template contains default settings that will be used to create the extension. For more information on extension templates, see Manage Client's Extension Templates section.

     - Company name

- Contact name
- Login
- Password
- Confirm Password
- Phone
- Fax
- Email
- Address
- City
- State/Province
- Postal/ZIP code
- Country
- Interface language – Use this dropdown list to choose the interface language for the extension account. The list contains all the available languages for the interface.

> **Note**
>
> If you choose the `Default` option, the language that will be used for the client account interface is the one specified by the administrator.

- Phone language – Use this dropdown list to select the language of the sound files that will be played over the phone. The default value is English.
- Extension notes – Use this textbox to insert comments about the extension.

- Billing and outgoing call filtering
  - Billing plan – Use this dropdown list to choose one of the available billing plans that will apply to the new extension account.
  - Outgoing routing group – Use this dropdown list to choose one of the outgoing routing rule groups you have previously defined. The purpose of this rule group is to restrict the outgoing calls placed by the new extension.
- Extension type selection
  - Extension type – Choose one of the following options:
    - Phone terminal

- Queue
- IVR
- Voicemail Center
- Conference
- Callback
- Calling Card

3. The Select extension permissions and limits checkbox allows you to specify what the extension will be able to do in the system:

   - If you click OK you are directed to the next step: specifying the extension's permissions and limits.

     > **Note**
     >
     > When you click OK information on the newly created account will be sent by email to the account owner (Contact person).

   - Uncheck the checkbox and click OK if you want to add the new extension account without configuring its permissions. If you choose to set limitations later, skip steps 4 and 5. Click Cancel to go back to the previous page without adding the extension or click OK to go further.

   > **Note**
   >
   > An extension that does not have its limitations and permissions set will have all permissions disabled and all limits set to 0. The account expiration date is `unlimited`.

4. A new page opens allowing you to change the account permissions and limits.

   - Permissions

     - Extension is multi user aware – This option allows the extension to "see" the other extensions available on the same client account and use them when setting up features involving call redirection such as: Ring all, Call forward, Call cascade, etc.

       > **Note**
       >
       > The `Extension is multi user aware` option is displayed for Phone `terminal` extensions only. Other extension types MUST be multi-user aware by design because otherwise they cannot serve their purpose.

- Sound management – This option allows the extension to manage sound files, folders and languages.
- Phone extension SIP management – When this option is enabled, the extension user is allowed to use the provisioning features on his/her Phone Terminal Extensions. Additionally he/she can choose the Allowed codecs for the Phone Terminal extensions. For more information on this topic, see the Provisioning section.

> **Note**
>
> The `Phone extension SIP management` option is available for phone terminal extensions only.

- Limits
  - Maximum disk space for sound files – Use the available textbox to specify the maximum storage space reserved for sound files. If you do not want to limit the disk space for sound files upload, select the Unlimited checkbox.
  - Maximum concurrent calls – Use the available textbox to limit the number of external calls that can be active at the same time. If you do not want to limit the extension, select the `Unlimited` checkbox.

> **Note**
>
> The `Maximum concurrent calls` option is displayed for Phone `terminal` extensions only.

  - Maximum concurrent text to speech – Use the available textbox to limit the number of calls that are allowed to use the text to speech application at the same time. If you do not want to limit the extension, select the `Unlimited` checkbox.

> **Note**
>
> This option is available only if the system administrator has enabled the option `Allow text to speech` on the server.

  - Maximum number of queue members – Use the available textbox to limit the number of agents that can be added to the queue.

Note

The `Maximum number of queue members` option is displayed for Queue extensions only.

- ◦ **Maximum number of queue members** – Use the available textbox to limit the number of agents that can be added to the queue.

Note

The `Maximum number of queue members` option is displayed for Queue extensions only.

- ◦ **Account expiration date** – To specify the date when the extension account becomes invalid, uncheck the `Unlimited` checkbox and provide a date using the textbox or the calendar button available.

- **Incoming phone number selection**
  - ◦ **Public phone number selection** – Use the dropdown list to associate an incoming phone number from the client's pool with the extension.

Note

This section is displayed only if there are phone numbers available in the client account where the extension is located.

5. The `Select extension type parameters` checkbox allows you to configure the active features of the new extension:
   - Enable the checkbox and click `OK` to save the extension permissions and go to the next step (activate extension features).
   - Uncheck the checkbox and click `OK` to save the extension permissions and add the extension with the default features.
   - Click `Cancel` to exit without saving the extension permissions and limits.
6. A new page opens allowing you to activate the features for the extension. These options depend on the type you have selected previously.

Phone Terminal Setup

If the extension type is `Phone terminal`, 4PSA VoipNow displays the following options:

- **Basic settings**

- Default music on hold folder – This folder contains the sound files that will be played in order, when the caller is on hold or when the extension waits for an operation to be performed. Use the icon to view available folders and all the music on hold files inside the chosen folder.

> **Note**
>
> The path will display the folder name and also its origin:
>
> //// placed before the name of a folder signals the admin's default folder
>
> /// placed before the name of a folder signals the reseller's default folder
>
> // placed before the name of a folder signals the client's default folder
>
> / placed before the name of a folder signals the extension's default folder

- Caller-ID name in external calls – This option is used when the extension is calling external destinations. When this option is enabled, phones with Caller-ID display the extension owner's name. Otherwise, they display Anonymous.
- Caller-ID number in external calls – This option is used when the extension is calling external destinations. When this option is enabled, phones with Caller-ID display the extension public phone number.
- Use the following Caller-ID – This option is available only if the phone terminal has several public phone numbers associated. Use the dropdown list to select the phone number that will be displayed when the extension user is calling external destination.
- Use the public Caller-ID of extension – 4PSA VoipNow allows extensions to use the Caller-ID of other extensions when making calls outside the system. Use this dropdown list to choose a Caller-ID of another extension on the client account.

> **Note**
>
> This option is available only if the phone terminal has the option 'Extension is multi user aware' enabled and it has no Public phone number associated with it.
>
> The extensions that are disabled are displayed in grey colour in the dropdown list.

- Consider 'No answer' after {x} seconds – Use this textbox to set the time interval a call is allowed to ring before being terminated by the 4PSA VoipNow server.

- Parking timeout {x} seconds – Use this textbox to set the time interval a call is allowed to remain in the parking lot before being transferred back to the extension that parked the call.
- Call API access [] with preferred agent - Select this checkbox to allow the extension to access Call API and choose the agent that you will use for call API. Selecting a different agent than the one you use may lead to unexpected behavior. Select NONE if you intend to send direct commands to call API. For more information, please read the Call API

- Call forwarding – Starting with 4PSA VoipNow version 1.5 this section has been removed. You can use call forwarding features from the "Incoming call rules" page.

> **Note**
>
> In case you have upgraded from a version previous to 1.5, please note the following:
>
> If you did not set any "Call forwarding" rules while using the previous 4PSA VoipNow version, there will be no side effects when upgrading to 4PSA VoipNow 1.5. You can still set up the call forwarding functionality from the "Incoming call rules" page.
>
> If you previously used the "Call forwarding" functions, when installing the 4PSA VoipNow version 1.5, these functions will be transferred to the "Incoming call rules" page. Click the **Incoming call rules** icon and in the "Existing incoming call rules" table you will see three new rules:
>
> - The rule corresponding to "Forward all calls to extension number" will be:
>
>   Action = `Transfer` Number check = `Matches` Pattern = `.` In time interval `Full month` To extension = `{extension_name(short_number)}`
>
> - The rule corresponding to "Forward when busy to extension number" will be:
>
>   Action = `Transfer` Number check = `Matches` Pattern = `Busy` In time interval `Full month` To extension = `{extension_name(short_number)}"`
>
> - The rule corresponding to "Forward when no answer to extension number" will be:
>
>   Action = `Transfer` Number check = `Matches` Pattern = `No answer` In time interval `Full month` To extension = `extension_name(short_number)}`
>
> If a system user has edited the extension's default time interval `Full month`, when installing the 4PSA VoipNow 1.5, the system will add a time interval

named "Full month{4 random generated digits}" because it needs a time interval that covers the whole period.

- Caller waiting – Calls are not rejected when the extension is busy.
    - Call waiting active – When this option is enabled, the user will be able to answer to multiple calls using the phone call waiting features.
- Do not disturb – Calls are rejected and a custom sound file can be played when this function is active.
    - Do not disturb function active – When this option is enabled, the user is not disturbed by incoming calls.
    - Play sound – This sound is played for the callers trying to contact the extension while the `Do not disturb` function is enabled. Use the icon to select the sound.
- Authentication to reach extension – This feature ensures privacy by requesting callers to provide a secret password before being connected to the extension.
    - Authentication active – When this option is enabled, callers will be prompted to dial a password (i.e. a number) in order to connect to the extension.
    - Password required to connect – Use this textbox to set the password that the caller is required to dial.
    - Play sound – Use the icon to select the sound played to the callers when the extension requires a password.
- Cascade calls – This feature allows incoming calls to ring multiple extensions in a predefined order.

> **Note**
>
> The `Cascade call` function is available, if there is at least one phone terminal extension on the same client account and the extension has `Extension is multi-user aware` permission enabled.
>
> The `Cascade call` and the `Ring all` functions cannot be activated at the same time.
>
> The extensions that are disabled are displayed in grey colour in the dropdown lists.

    - Call {extension} after {x} seconds – If the call has not been answered after {x} seconds, the selected {extension} rings. The {x} value must be between 5 and 999.Use the buttons to remove/add extensions from the list.

removes the extension section

adds another extension section

You can add new extension blocks as long as you still have unused extensions in the select options.

> Note
>
> The extensions in the cascade must be different. If you try to add the same extension twice, 4PSA VoipNow displays an error message. The destination extensions must belong to the same client account.

- Ring all – This feature allows incoming calls to call simultaneously multiple extensions.
  - Ring extension – Use this dropdown list to choose the extension(s) that will ring at the same time in case of an incoming call.

    Use the buttons to remove/add extensions from the list.

    removes the extension section

    adds another extension section

> Note
>
> The `Ring all` function is available, if there is at least one other extension on the same client account and the extension has the `Extension is multi user aware` permission enabled. The destination extensions must belong to the same client account.
>
> The `Cascade call` and the `Ring all` functions cannot be activated at the same time.

- Voicemail – This feature allows callers to leave voice messages when the extension is unavailable or busy.
  - Enable Voice Mail – When this checkbox is enabled, the extension is able to use the voicemail function.
  - Mailbox storage space – The space limit allowed for the mailbox. Use this textbox to specify the number of Mb that the mailbox should not exceed. If you do not want to set a size limit, select the `Unlimited` option.
  - New message notification – Choose the action that will be performed by 4PSA VoipNow when the extension receives a new voicemail message:

    - **send alert email** – When this option is selected, the extension owner receives an email notifying him/her about a new voicemail message.
    - **send message by email** – When this option is selected, the extension owner receives the new voicemail message file by email.
  - **Voicemail password** – The mailbox password requested when the mailbox is accessed over the phone.

> **Note**
>
> If you do not set a password for the voice mailbox, the extension owner is not able to access his/her mailbox over the phone. However, he is still able to manage the Voicemail mailbox through the 4PSA VoipNow interface.

  - **Voicemail automatically answers after {x} seconds** – If user does not answer after {x} seconds, `Voicemail` answers.
  - **Add extension to company directory** – When this option is selected, the extension is added to company directory.
- **Conference** – This feature allows more than two extension owners to take part to the same phone conversation.

> **Note**
>
> The `Conference` function is available only for the extensions that have `Extension is multi-user aware` permission enabled.

  - **Conference function enabled** – When this checkbox is enabled, the extension is able to create and join conference calls.
  - **Conference room size** – Use this textbox to set the maximum number of users that can join the conversation. You can fill in any number between 2 and 99.

> **Note**
>
> You can change the Conference room size only if the `Extensions Features Management` permission has been activated for his account.

  - **Enable music on hold** – When this option is selected, 4PSA VoipNow plays the files located in the `Default music on hold` folder if there is only one user present in the conference.
  - **Prompt for PIN on conference creation** – When this option is enabled, 4PSA VoipNow asks the conference creator to set a password; all the users

that join the conference have to dial this password in order to access the conference.

  - **Close the conference when conference creator exits** – When this option is enabled, 4PSA VoipNow terminates all calls when the conference creator exits the conference.
  - **Announce user count on joining conference** – When this option is selected, 4PSA VoipNow announces any new participant about the number of users in the conference call.
  - **Announce users joining/leaving** – When this option is selected, 4PSA VoipNow announces the users about any participant joining or leaving the conference call.

- **Call recording** – This feature allows the user to record phone conversations.
  - **Call recording function enabled** – When this option is enabled, the user is able to use call recording functions.
  - **Call recording storage space** – Use the available textbox and checkbox to limit the storage space allowed for recorded calls. If you do not want to limit the storage space, make sure the `Unlimited` checkbox is selected. Otherwise, uncheck the `Unlimited` checkbox and fill in the textbox a size limit.
  - **Record triggered** – Use the available options to specify when/ how call recording will be triggered:
    - **Never** – Although the call recording feature is enabled, it is not used.
    - **Only conferences** – When this option is enabled, 4PSA VoipNow will record only conference conversations. This option is available only if `Conference` feature is enabled.
    - **When *1 is pressed** – When this option is enabled, the user will be able to start the recording of a conversation by dialing *1 on his/her phone pad.
    - **All calls are recorded** – When this option is enabled, 4PSA VoipNow will record all the conversations of the extension.
  - **Play sound {sound} when call recording starts** – When this option is enable, 4PSA VoipNow plays the sound each time a recording operation starts. Use the icon to select the sound.

- **Fax Center** – This feature allows the extension to receive faxes and manage them by using the extension account.

- Enable fax center – When this checkbox is enabled, the extension is able to receive faxes. Upon the receipt of a fax, 4PSA VoipNow will save it into a file on the server; the extension user can later retrieve them.
- Fax files disk space – The space limit allowed for the storage of fax files. Use this textbox to specify the number of Mb that the fax files should not exceed. If you do not want to set a size limit, select the `Unlimited` option.
- New fax notification – Choose the action that will be performed by 4PSA VoipNow when the extension receives a new fax message:
  - send alert email – When this option is selected, the extension owner receives an email notifying him/her about a new fax message.
  - send message by email – When this option is selected, the extension owner receives the new fax message file by email.

> **Note**
>
> This option is available only if you have the permission `Extension Feature Management` enabled. For more information, check with the system administrator.

- Fax automatically answers after {x} seconds – If the extension user does not answer after {x} seconds, the server will try to answer in order to detect a fax.
- If not a fax, send to voicemail – When this option is enabled, the server will transfer the call to the extension's voicemail in case the call is not a fax. Otherwise the system will answer with fax tone.

> **Note**
>
> This option is available only if the Enable Voicemail checkbox is selected.

> **Caution**
>
> To define the behavior of the extension for the case when the user cannot answer a call, you must take into account the following parameters:
>
> - Consider 'No answer' after {no answer} seconds
> - Voicemail automatically answers after {voicemail answer} seconds
> - Fax automatically answers after {fax answer} seconds
> - If not a fax, send to voicemail
>
> The following configuration is recommended for a correct behavior:

- {no answer} > {voicemail answer} > {fax answer}
- 'If not a fax, send to voicemail' checkbox enabled

Provisioning

4PSA VoipNow can automatically configure the phone associated with a Phone Terminal extension. This feature is called *provisioning* and it helps you set and maintain identical configurations for a large number of phone devices.

The default behaviour is the following: after a new phone terminal is added to the system, 4PSA VoipNow displays this message:

> Extension John Smith (0197*002) has been successfully added.
>
> Click here if you want to provision this extension now. If you want to provision every newly added extension click here.

However, if you previously chose to perform provisioning each time you add a new phone terminal, 4PSA VoipNow displays the following message:

> You have been directed to this page because you previously opted to provision every newly added phone terminal. If you do not want to provision and you do not want to be directed here on new phone terminal additions, click here.

Caution

If you have upgraded to 4PSA VoipNow 1.5.0 from a version earlier than 1.4.0, and the administrator has not set the hostname or IP address of the provisioning server you will get the following error message: "The server IP is not set. Please contact your administrator."

- Phone provisioning

  Caution

  Your clients and extensions account will be able to see **Phone provisioning** section only if they have the **Phone extension SIP management** permission enabled. More details on how to set this permission can be found in these sections: Client's Permissions and Limits, Extension's Permissions and Limits.

  - Use provisioning - When this checkbox is enabled, the phone device associated with the extension will get all its setup parameters from the provisioning server. Otherwise, the extension user will have to manually set the phone parameters.

- Phone brand and model - Use this dropdown list to select one of the phone brands and models supported by the 4PSA VoipNow provisioning system.

> Note
>
> The current 4PSA VoipNow version supports the following phone brands: Aastra, Cisco, Grandstream, Linksys, Snom.

- Firmware - Use this dropdown list to select one of the firmware versions corresponding to the selected brand and model. The list contains the firmware versions available in the 4PSA VoipNow provisioning database.
- Phone MAC - The MAC address of the phone. Check your phone documentation to obtain it. You must enter the MAC address in the following format: XX:XX:XX:XX:XX:XX, where X is a hexadecimal digit (i.e. 0-9, A-F or a-f).
- Phone admin username - The username for logging in to the phone's browser based configuration interface.

> Note
>
> Not all phones support configuration via a web browser. Check the documentation for your specific phone.

- Phone admin password - The password for logging in the phone's browser based configuration interface.
- Confirm phone admin password - Use this textbox to re-enter the password for logging in the phone's interface.
- Phone update interval - The number of minutes the phone waits before checking for updates on the provisioning server. The default value is 10 minutes. Allowed values range from 1 to 999 minutes.
- Update protocol - The protocol used by the phone to access the configuration file on the provisioning server.
- Regenerate provisioning location - When this checkbox is enabled, 4PSA VoipNow will delete the existing configuration file and create a new configuration file with a different name.

* SIP Preferences
  - Use the same password with interface - When this option is enabled the extension user's phone will use the account login password to

authenticate to the 4PSA VoipNow Server. If the checkbox is disabled you can use the two following textboxes to set and confirm the phone password.

- Password
- Confirm Password
- DTMF – Use this dropdown list to choose the DTMF mode. The default option is rfc2833. If you choose the auto option, Asterisk automatically detects whether the channel supports rfc2833 or not; if the channel does not support rfc2833, Asterisk uses inband mode.
- Qualify – The server can check the extensions for presence regularly. If the extension does not answer in a time below this setting, it is considered offline. This feature can be disabled if you select the option None.
- Allowed codecs - Use these checkboxes to select the codecs supported by the phone device.

> Note
>
> **Allowed codecs** is displayed only if you have the Phone extension SIP management permission enabled. If you want to obtain this permission, please contact your system administrator.

> Caution
>
> Your clients and extensions account will be able to see **Allowed codecs** only if they have the **Phone extension SIP management** permission enabled. More details on how to set this permission can be found in these sections: Client's Permissions and Limits, Extension's Permissions and Limits.

- Phone is on IP {ip} Port {port} - If you specify the phone terminal's IP address and port in this textboxes, the extension will no longer have to register to the server. All the calls for this extension will be transferred directly to this IP.
- Permit from network - The server accepts packages only from the specified networks
- Deny from network - The server denies packages from the specified networks

> **Note**
>
> If the same network address is specified in the **Permit from network** and the **Deny from network** fields, the server will NOT accept packages from the respective address.

- Equipment description - Use this textbox to briefly describe your phone model.

Queue Setup

This type of extension is used to implement call center functionality.

4PSA VoipNow displays the following options:

- Queue form
  - Queue name – A name that easily identifies the queue
  - Queue size – The maximum number of callers waiting to talk to an operator. If you do not want to limit the queue size, enable the `Unlimited` option. Otherwise, disable the `Unlimited` option and fill in a value in the available textbox.
  - Call distribution algorithm – 4PSA VoipNow offers you several methods of assigning calls to queue operators:
    - Ring all – All free operator extensions ring at the same time and the call is transferred to the first operator that answers.
    - Distribute calls evenly – This method searches for available agents sequentially and uses the order of the agent list. Each time it tries to assign a call, it remembers the starting position `start`; the next time a waiting call arrives, the search begins with agent in position `start+1`.

      For example, let's assume you have a queue served by 3 agents. The first time a call arrives, 4PSA VoipNow searches for the first available operator using the order Agent1, Agent2, Agent3. When the second call arrives, 4PSA VoipNow starts the search with Agent2.
    - Least recently called – The call is transferred to the operator with the longest waiting time interval from the previous call.
    - Fewest calls – The call is transferred to the operator who has answered the fewest calls. This method does not take into account the actual agent workloads; it ignores the time the agents spent on each call.

For example, if Agent1 has had 3 calls, each lasting for 10 minutes and Agent2 has had 5 calls each lasting 2 minutes, 4PSA VoipNow will assign a new call to Agent1.

- Random – The call is transferred to a randomly selected operator.
- Round robin with memory – This method is similar with the Distribute call evenly algorithm. The difference is that Random robin with memory remembers the position of the agent who answered the call answered; the next time a waiting call arrives, the search will begin with agent in position answered+1.

  For example, let's assume you have a queue served by 3 agents. The first time a call arrives, 4PSA VoipNow searches for the first available operator using the order Agent1, Agent 2, Agent 3. Let's suppose Agent2 is available and answers the call. When the second call arrives, 4PSA VoipNow starts the search with Agent3 and uses the order Agent3, Agent1, Agent2.

◦ Wait for {x} seconds before retrying all agents again – After ringing all operators according to the queue's call distribution algorithm, the application waits for {x} seconds before restarting the process. Values for this parameter range from 3 to 900 seconds. The default value is 20 seconds.

◦ Record all queue conversations – This option allows the recording of all the calls taken by the queue operators.

◦ Service level agreement – This is the maximum time interval that callers should be waiting in the queue. Values for this parameter range from 3 to 9999. This textbox is empty by default.

> **Note**
>
> 4PSA VoipNow 1.5.0 does not use the **Service level agreement** value. It will be used in future versions.

◦ Call recording storage space – When the call recording option is enabled, you have the possibility to limit the storage space for the recordings. If you don't want to limit the space for call recordings select the Unlimited checkbox.

- Local agent's behavior

  ◦ Ring an agent for a maximum of {x} seconds – The value {x} is the maximum time interval that an operator extension will ring. The default value is 20.

- Maintain a minimum of {x} seconds between calls – The value {x} specifies the minimum operator break between calls. The default value is 120.
- Contact agents involved in non-queue conversations - When this option is enabled, operators that are involved in non-queue conversations will be contacted.
- Delay for {x} seconds before connecting agent to caller – After an operator answers a call, the application will wait for {x} seconds before connecting the caller to the operator. Values for this delay range from 0 to 60 seconds. The default value is 0 seconds.
- Restart timer if agent does not answer – When this option is enabled, the timer Maintain a minimum of {x} seconds between calls is reset every time the agent does not answer.
- Pickup announcement for agent – The sound that 4PSA VoipNow plays for queue agents before connecting them to a waiting call.

> **Note**
>
> This feature is useful for agents that are simultaneously logged to several queues at the same time. Distinctive sounds can be assigned for every queue.

- Report how long the user waited in the queue – When this option is enabled, 4PSA VoipNow reports the time the user spent in queue before being connected to an agent.

- Queue agents
  - Available extensions – This list contains the extension owners available to join the queue as operators. To add an extension to the queue, select it from the Available extension list and click the >>> Move button.
  - Assigned extensions – This list contains the extension owners that will join the queue as operators. Technically they can join the queue from any phone terminal extension, based on their agent code and password. To remove an extension from the queue, select it from the Assigned extension list and click the <<< Remove button.
- Caller behavior
  - Welcome sound – The sound played to the caller before connecting him/her to the queue
  - Announce Position every {y} seconds – When this option is enabled, the callers will be informed about their position in the queue.

> Note
>
> The caller will be announced of his/her position in the queue using the `There are` sound and the `The current estimated hold time is` sound set in section Sound files setup.

- Announce expected time to connect – When this option is enabled, the callers will be informed about the estimated waiting time.
- Periodic announcements every {x} seconds – A periodic announcement is a message like "Thank you for holding, your call is important to us". The value {x} specifies the frequency of these announcements. The default value is 30.
- Exit to extension on key pressed - When this option is enabled, the caller can exit the queue by pressing "0" key on his/her phone pad. The call will be transferred to another extension belonging to the same client account. Select the destination extension from the dropdown list.

- Sound files setup
  - Music on hold – The sound played to the callers while they are waiting

> Note
>
> The path will display the folder name and also its origin:
>
> `////` placed before the name of a folder signals the admin's default folder
>
> `///` placed before the name of a folder signals the reseller's default folder
>
> `//` placed before the name of a folder signals the client's default folder
>
> `/` placed before the name of a folder signals the extension's default folder

  - 'There are' sound – The sound played to announce the position in the queue
  - 'The current estimated hold time is' sound – The sound played to announce the estimated hold time in the queue
  - 'You are now first in line' sound – The sound played to the caller that is in the second position in the queue
  - 'Thank you for your patience' sound – The sound played to the caller that is first in the queue
  - 'Calls waiting' sound – The sound played to describe how many calls are waiting in the queue

- 'Less than' sound – The sound played to announce the number of seconds to agent connection
- 'Hold time' sound – The sound played to announce the 'Hold time'
- 'All reps busy / wait for next' sound – The sound played to announce that 'All reps busy / wait for next'
- 'Seconds' sound – The sound file that corresponds to the word 'seconds'
- 'Minutes' sound – The sound file that corresponds to the word 'minutes'

- Queue behavior

> **Note**
>
> The following options can be edited only if there is at least another phone terminal extension in the same client account.

- If a caller has been in queue for {x} seconds, transfer it to extension {extension} – Use this option to set a maximum waiting time and to specify an extension to transfer the call to in case it exceeds this time. When the checkbox is enabled you can fill in the two textboxes:
  - {x} the waiting interval. The default value is 600.
  - {extension} the extension where the call will be transferred.
- If there are no agents logged in queue, transfer caller to extension {extension} – Use this option to specify an extension to transfer the call to in case there are no operators logged in the queue.
- If all agents are unavailable, transfer new calls to extension {extension} – Use this option to specify an extension to transfer the new call to when all operators are busy.
- Play sound {sound} to the caller when queue timeouts - Use this option to specify the sound that will be played to the caller on queue timeout.

> **Note**
>
> The extensions that are disabled are displayed in grey colour in the dropdown lists.

Interactive Voice Response (IVR) Setup

If the extension is of type IVR, 4PSA VoipNow displays the following options:

- Add IVR
  - Name – A name that easily identifies the IVR
  - Clone IVR settings from – In case you want to replicate all the settings of an existing IVR, use this dropdown list to select the name of the IVR you want to copy.

    > **Note**
    >
    > You can only clone IVRs belonging to your clients. You will not have in the dropdown list IVRs belonging to other resellers.
    >
    > Please check the IVR Report for structural errors after cloning an IVR.
    >
    > If you clone an IVR extension that belongs to a client, for use with another client, problems may arise: in case of an option transferring the call to an extension number, the system will not copy that extension number. Similarly in the case of options implying transfers to extensions in certain time intervals - the time intervals will not be copied.
    >
    > For more information on the report please read View the IVR Structural Report section.

  - Default music on hold folder – Use the icon to view available folders and all the music on hold files inside the chosen folder.
  - Timeout – Use this textbox to limit the time interval that an IVR caller can remain inactive when the IVR waits for his/her input. The allowed values range from 2 to 60 seconds. The default value is 8 seconds.
  - IVR session lifetime – Use this textbox to limit the total time interval that an IVR caller can spend in the IVR menu. The allowed values range from 10 to 86400 seconds. The default value is 1800 seconds.
  - If lifetime expires - Choose the action that will occur when IVR lifetime expires. The available options are:
    - Hangup - The call will be terminated when IVR lifetime expires.
    - Transfer to extension - The call will be transferred to an extension when IVR lifetime expires. Use the dropdown list to choose the extension the call will be transferred to.
    - Play sound - Choose a sound that will be played for the caller when IVR lifetime expires. Use the icon to view available sound files or write the address of the file in the text box.
  - Description – Use this text area to associate some notes about the purpose and content of the IVR.

Note

This page only creates an extension of type IVR but does not define its functionality. For more information on how to design the behaviour of an IVR, see Design an IVR's Behavior.

Voicemail Center Setup

This type of extension is similar to the voicemail function of the phone terminal extension. However, the `voicemail center` allows users to verify their messages from a telephone located outside the system (e.g. a public phone).

4PSA VoipNow displays the following options:

- **Play sound {folder} {sound} before connecting to voicemail center** – When the checkbox is enabled use icon to select a sound that will be played for the caller before he is connected to the extension.

Note

To verify the sound you chose, click the button. A dialog box will open allowing you to play the sound file or download it to your computer.

Conference Setup

This type of extension allows the creation of conferences that can be accessed by users calling from phones connected to the system as well as outside callers (e.g. calling from a phone connected to the PSTN).

4PSA VoipNow displays the following options:

- **Play sound {folder} {sound} before connecting to conference center** – When the checkbox is enabled use the icon to select a sound that will be played for the caller before he is connected to the extension.

  Note

  To verify the sound you chose, click the button. A dialog box will open allowing you to play the sound file or download it to your computer.

- **Allow callers to start conference** -
- **PIN for conference creation** - Use the textbox to specify the password set for conference creation between 4 and 12 digits.

- **Conference room size** - Use this textbox to set the maximum number of users that can join the conversation. You can fill in any number between 2 and 99.

> **Note**
>
> You can change the Conference room size only if the `Extensions Features Management` permission has been activated for your account.

- **Enable music on hold** - When this option is selected, 4PSA VoipNow plays the files located in the `Default music on hold` folder if there is only one user present in the conference.
- **Prompt for PIN on conference creation** - When this option is enabled, the users that join the conference have to dial the password set on conference creation in order to access the conference.
- **Close the conference when conference creator exits** - When this option is enabled, 4PSA VoipNow terminates all calls when the conference creator exits the conference.
- **Announce user count on joining conference** - When this option is selected, 4PSA VoipNow announces any new participant about the number of users in the conference call.
- **Announce users joining/leaving** - When this option is selected, 4PSA VoipNow announces the users about any participant joining or leaving the conference call.
- **Record all conference conversations** - When this option is enabled, 4PSA VoipNow will record all the conversations in this conference.
- **Call recording storage space** – Use the available textbox and checkbox to limit the storage space allowed for recorded calls. If you do not want to limit the storage space, make sure the `Unlimited` checkbox is selected. Otherwise, uncheck the `Unlimited` checkbox and fill in the textbox a size limit.

Callback Setup

This type of extension allows system users to call this extension from a phone connected to the public network and then place an outgoing call through the 4PSA VoipNow server.

4PSA VoipNow displays the following options:

- **Basic settings**

- Caller-ID name in external calls - Enable this checkbox if you want the user receiving the call to view the Caller-ID name of the extension.
- Caller-ID number in external calls - Enable this checkbox if you want the user receiving the call to view the Caller-ID number of the extension.
- Trigger call return after {x} seconds of ringing - Use this textbox to insert the number of seconds a caller should wait until the server transfers the connection.

- Callback number behavior
  - Return calls - Use this dropdown list to select the phone number where the call will be returned. You have the following options: `coming from the authorized Caller-IDs` (4PSA VoipNow returns the call only if it is made from an authorized number), `to the caller Caller-ID` (4PSA VoipNow returns the calls made from any number), `to a fixed number` (4PSA returns the call to a predefined phone number).

    Note

    In case the `coming from the authorized Caller-IDs` option is selected, and a user whose Caller-ID is not included in the authorized ID's list tries to route his/her call through the server, the server will not call back.

    In case the `to the caller Caller-ID` option is selected, and a user whose Caller-ID is hidden tries to route his/her call through the server, the server will not call back.

  - Number where calls should be returned - You can use this field only if you previously selected the option `to a fixed number` in the return calls field. Use this textbox to enter a predefined phone number where the server returns all calls.
  - Play before disconnecting the call during conversation - Use this control to select the sound that will be played to the user that made the call, upon automatically interrupting the conversation (e.g.: a sound announcing that credit value is `0`).

- Service security
  - Request the following password on callback - Use this textbox to enter the password the system should require to the user wishing to route their calls through the server.
  - Request password associated with authorized Caller-ID - Enable this checkbox if you want the system to require users their individual passwords, to verify whether they are included in the authorized caller-id's list.

◦ User can interrogate the account credit - Enable this checkbox if you want to give the users the possibility to find out their credit value, before starting the conversation.

◦ Service client must dial remote party number in - Use this textbox to specify the time interval (in seconds), the user has at its disposal for dial the remote party number.

Calling Card Setup

This type of extension allows the implementation of a calling card system on the 4PSA VoipNow server.

4PSA VoipNow displays the following options:

- Basic settings
  - Caller-ID name in external calls - Enable this checkbox if you want the user receiving the call to view the Caller-ID name of the extension.
  - Caller-ID number in external calls - Enable this checkbox if you want the user receiving the call to view the Caller-ID number of the extension.
  - Service client must dial remote party number in - Use this textbox to specify the time interval (in seconds), the user has at its disposal for dial the remote party number.
- Service behaviour
  - Do not allow the user to call if credit below {x} USD - Use this textbox to define the minimum credit a user should have when placing a call through the calling card extension.
  - Play when the call can not be initialized due to lack of credit - Use this control to select the sound that should be played to the user running out of credit, upon automatically interrupting the conversation.
  - Play before disconnecting the call during conversation - Use this control to select the sound that should be played to the user that made the call, upon automatically interrupting the conversation.
  - User can interrogate the account credit - Enable this checkbox if you want to give the users the possibility to find out their credit value, before starting the conversation. After the user is authenticated with one of the card codes he can choose to either interrogate his credit or make a phone call.

Edit an Extension

Edit General Information

To edit the general information of an extension account, click the chosen extension link in the Extension Management page.

> **Note**
>
> You can only edit extensions if the permission `Extension management` has been activated for his account. If this permission has not been activated, the reseller can only edit the contact details of the extension.

Follow the steps:

1. Click the Edit extension icon available in the Tools area.
2. A new page opens where you can view and edit details about the selected extension and its owner. The data is grouped in several sections:
   - Extension setup – Use this section to change the extension local number.
   - Extension owner – Use this section to modify extension owner's personal information or the username and password he can use to log in the system.
   - Billing and outgoing call filtering – Use this section to change the billing plan associated to the extension.
3. Resend extension contact details - Check this box if you want to resend contact details to the email address specified for the extension account. The contact details will also be resent to the client and reseller who own the extension, as well as to the administrator of the system, if the appropriate parameters have been set in the PBX » Email templates page.

Edit Extension Features

In the 4PSA VoipNow system, each type of extension has its own set of features and functionalities. To view and edit these features, follow these steps:

- If the extension is of type `Phone Terminal`, click the Phone Terminal icon in the extension account page.

- If the extension is of type Queue, click the Queue icon in the extension account page.
- If the extension is of type IVR, click the IVR icon in the extension account page. In the new page that opens, you can design the functionality of the IVR. For more information on this topic, see Design an IVR's Behavior.
- If the extension is of type Voicemail Center, click the Voicemail Center icon in the extension account page.
- If the extension is of type Conference, click the Conference icon in the extension account page.
- If the extension is of type Callback, click the Callback icon in the extension account page.
- If the extension is of type Calling Card, click the Calling Card icon in the extension account page.

Manage Extensions Groups

4PSA VoipNow allows you to define extensions groups. In order to access the Extensions groups management page, click the icon located in the Tools section of the Client management page.

In the Extensions groups management page, a table is displayed, containing the existing extensions groups. The following information is available:

S - This column shows the status of the respective extensions group. It can be - enabled, or

Name - The name of the extensions group.

Code - The code of the extensions group.

Tags - Identification tags of the extensions group. The user can search in an extensions groups list by using these tags as search criteria.

Extensions - The number of extensions in the respective group.

Created - The date when the extensions group was created.

Adding An Extensions Group

In order to add an extensions group, click the . The Add new extensions group page opens, allowing you to create a new extensions group. The following options are available:

Code - The code of the extensions group.

Name - The name of the extensions group.

Tags - Identification tags for the extensions group.

Extensions

- Available extensions - The available extensions that can be added to the new group.
- Assigned extensions - The extensions that were already assigned to the new group.

To add an extension to the group, select the respective extension in the Available extensions list and click >>>.

To remove an extension from the group, select the respective extension in the Assigned extensions list and click <<<.

Description - A short description regarding the channel group.

View Permissions and Limits

4PSA VoipNow allows you to view detailed information about on the permissions and limits of an extension account in case you don't have Extension Feature Management permission. To access this information, follow the steps:

1. Click the chosen extension link in the Extension Management page.
2. Next, click the Extension permissions and limits icon available in the Tools area. The next page contains the following fields:
   - Permissions – This section displays the status of Extension is multi user aware and Sound management permissions or Phone extension SIP management.

> **Note**
>
> The `Extension is multi-user aware` permission is displayed for phone terminal extensions only. Other extension types MUST be multi-user aware by design because otherwise they can not serve their purpose.
>
> The `Phone extension SIP management` option is displayed for phone terminal extensions only.

- Limits – This section displays the limitation for the disk space used for sound files. It also displays the expiration date for the extension account.
- Incoming phone number selection – This sections displays the public phone numbers associated with the extension if the Phone Number Management permission is enabled.

> **Note**
>
> This section is displayed only if there are phone numbers available in the client account where the extension is located or in the extension's pool.

Edit Permissions and Limits

To modify the permissions and limits of a particular extension, click the chosen extension link in the Extension Management page and follow these steps:

1. Click the Extension permissions and limits icon available in the Tools area.
2. A new page opens where you can modify the following fields:
   - Extension is multi-user aware – This option allows the extension to "see" the other extensions available on the same client account and use them when setting up features that involve call redirection such as: Ring all, Call forward, Call cascade, etc.

> **Note**
>
> The `Extension is multi-user aware` option is displayed for phone terminal extensions only. Other extension types MUST be multi-user aware by design because otherwise they can not serve their purpose.

- Phone extension SIP management – When this option is enabled, the extension user is allowed to use the provisioning features on his/her Phone Terminal Extensions. Additionally he/she can choose the Allowed codecs for the Phone Terminal extensions. For more information on this topic, see the Provisioning section.

> Note
>
> The Phone extension SIP management option is displayed for phone terminal extensions only.

- Sound management – This option allows the extension to manage sound files, folders, and languages.
- Maximum disk space for sound files – Use the available textbox to specify the maximum storage space reserved for the sounds created by the extension user. If you do not want to limit the disk space for sound files, select the `Unlimited` checkbox.
- Maximum concurrent calls – Use the available textbox to limit the number of external calls that can be active at the same time. If you do not want to limit the extension, select the Unlimited checkbox.

> Note
>
> The Maximum concurrent calls option is available for phone terminal extensions only. Both incoming and outgoing external calls are counted.

- Maximum concurrent text to speech – Use the available textbox to limit the number of calls that are allowed to use the text to speech application at the same time. If you do not want to limit the extension, select the `Unlimited` checkbox.

> Note
>
> This option is available only if the system administrator has enabled the option `Allow text to speech` on the server.

- Maximum number of queue members – Use the available textbox to limit the number of agents that can be added to the queue.

> Note
>
> The `Maximum number of queue members` option is displayed for `Queue` extensions only.

- Account expiration date – To specify the date when the extension account becomes invalid, uncheck the Unlimited checkbox and provide a date using the textbox or the calendar button available.
- Incoming phone number selection – Use the dropdown list to associate a public phone number with the extension from the client's pool.

> Note
>
> When you assign an incoming phone number to an extension, the public phone number becomes exclusive to that extension. No other extension can use it as an incoming public phone number. From that moment on, callers from outside the 4PSA VoipNow system can reach that extension by dialing this number.
>
> This section is displayed only if there are phone numbers available in the client account where the extension is located or in the extension's pool.

Manage Extension's Time Intervals

4PSA VoipNow allows you to manage the extension's time intervals to help you define the incoming and outgoing call rules.

You can access this page from the Time Interval Management page by clicking the chosen extension name link and the Time intervals icon available in the next page, in the Tools area.

You can view a list of all available time intervals on the extension account. You can also perform several operations on these time intervals:

- Add a new time interval
- Search for a specific time interval
- Edit an existing time interval
- Delete time intervals

4PSA VoipNow displays the following information about each time interval:

- T – This icon specifies the method used to define the time interval:
  - Individual days method
  - Interval method

> **Note**
>
> For more information on the two approaches used for describing a time interval, see the Manage Your Time Intervals section.

- Name – The descriptive name of the time interval. Click this link to edit the time interval information.
- Hours – The hours used as limits for the time slot
- Weekdays – The days of the week used as limits for the time slot
- Month Days – The month period when the time interval applies
- Month – The month when the time interval applies
- Created – The date when the time interval was created

> **Note**
>
> When an extension account is added to the system, 4PSA VoipNow automatically creates a time interval named `Full month` that covers the entire month.

Search the Interval List

When the time intervals list is too long and you are searching for specific time intervals, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the time intervals whose name, hours, weekdays or dates contain the text.
- Show all – Click this button or the `Show all` label to display the entire list.

Even if you navigate to other pages, the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the `Number of entries per page` link. The number of entries per page is shown in the left side of the table along with the total number of time intervals.

Another way to simplify the listing is to sort the time interval list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

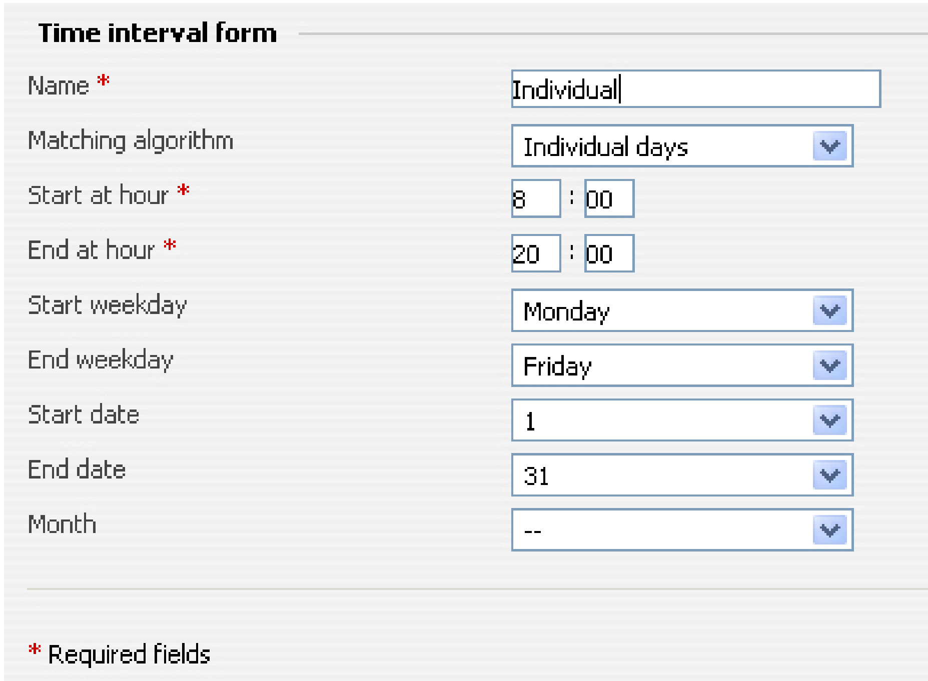
Add a New Time Interval

To add a new time interval, click the chosen extension name link in the Extension Management page. Next, click the Time intervals icon available in the Tools area and follow these steps:

1. Click the Add time intervals icon. A new page opens allowing you to enter information on the new time interval.
   - Name – Use the textbox to fill in a descriptive name to identify the time interval.
   - Matching algorithm – A time interval can be described in two ways:
     - Individual days – This method allows 4PSA VoipNow to match the same time interval in different days. See the example below.
     - Interval – This method allows 4PSA VoipNow to match a continuous time interval that extends over several days. See the example below.
   - Start at hour and End at hour – Use the available textboxes to specify the hours that limit the time slot.
   - Start weekday and End weekday – Use these dropdown lists to select the days of the week that define the time slot.
   - Start date and End date – Use these dropdown lists to select the days of the month that define the time slot.
   - Month - Use this dropdown list to select the month that defines the time slot.
2. Use the buttons to add several time intervals at the same time.
   - removes the corresponding `Time interval`
   - adds another `Time interval`
3. Click OK to add the new time interval(s). Click Cancel to go back to the previous page without adding the interval(s).

Example of a time interval defined in individual days

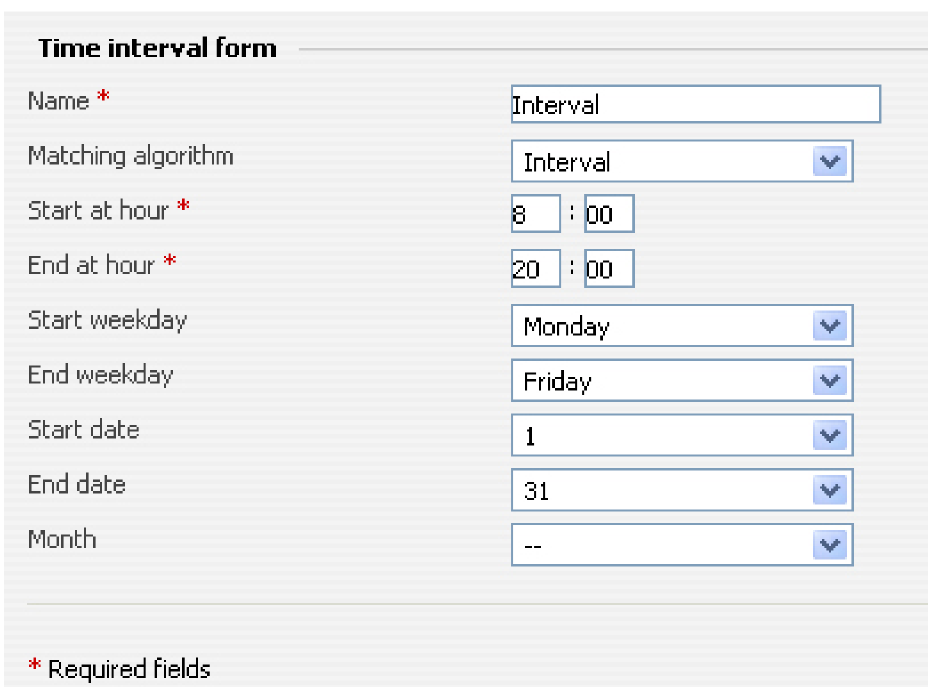
In the time interval below, 4PSA VoipNow matches calls made or received between the hours 8:00 – 20:00 on Monday, Tuesday, Wednesday, Thursday, and Friday between 1 and 31 every month.



A time interval defined in individual days

Example of a continuous time interval

In the time interval below, 4PSA VoipNow matches calls made or received between Monday, 8:00 and Friday, 20:00, between 1 and 31 every month.



A continuous time interval

Edit a Time Interval

To access this page, click the chosen extension name link in the Extension Management page. Next, click the Time intervals icon available in the Tools area and follow these steps:

1. In the time interval list, click the name link of the time interval you want to change.
2. A new page opens where you can rename the time interval and modify its start/end hours, days, dates. You can also change the matching algorithm.

   > **Note**
   >
   > For more information on these fields, see the Add a New Time Interval section.

3. Click OK to save the changes to the time interval. Click Cancel to return to the previous page without saving the changes.

Delete Time Intervals

To delete a extension's time intervals go to the Extension Management page, click the extension link and the Time intervals icon available in the next page.

Choose the time intervals you want to delete by checking the corresponding checkbox in the time interval list. Then click the Remove selected link. You will be asked to confirm the removal.

> **Note**
>
> Time intervals can be removed only if they are not currently used.

Edit Incoming Call Rules

Incoming Call Rules Overview

4PSA VoipNow allows you to filter the incoming calls to an extension. As a result, when a caller is trying to reach the extension, 4PSA VoipNow can perform a set of predefined actions. For example, let's assume that from 9:00 to 17:00 the extension owner is working and he is waiting for an important call that will be made on another extension. All he has to do is to define a rule that transfers the calls from an extension to the other one.

In the Incoming Call Rules page, you can view the incoming call rules for the selected extension. Multiple operations can be performed:

- Add new incoming call rules
- Change the priorities of the rules
- Delete existing incoming call rules

To view the incoming call rules for a certain extension, click the chosen extension link in the Extension Management page and the Incoming call rules icon available in the next page.

4PSA VoipNow displays the following information about each existing call rule:

- No – The position of the rule inside the group
- S – The status of the rule, displayed using an icon: enabled or Disabled. Click the icon to change the status of the rule.

> **Note**
>
> After you add a new rule, 4PSA VoipNow automatically sets its status as enabled. To disable the rule, click the corresponding icon.

- P – Use the available up and down arrows icons to change the position of the rule in the group.

> **Note**
>
> Any change made is countered in the left side of the list table: {x} pending changes. The counter is increased for each rule with a different position than the initial one.

- Action – The action performed when the caller's number matches the rule. The four possible actions are:
  - Busy – 4PSA VoipNow plays a "busy signal" to let the caller know that the number he is trying to reach is engaged in another call.
  - Congestion – 4PSA VoipNow plays a "fast busy signal" (known in telephony as a "congestion tone") to let the caller know that the call was unsuccessful.
  - Hang up – 4PSA VoipNow hangs up the incoming call rule.

- Set call priority – 4PSA VoipNow sets a certain priority for the incoming call in order to be answered faster by the operators in a queue. This action is available only for extensions of type Queue. The value of the priority parameter is also displayed here.
- Transfer – 4PSA VoipNow transfers the call to another extension on the same client account; this option is available if the extension has Multi-user aware permission enabled and there are available phone terminal extensions on the client account.
- Transfer on event – If the extension user does not answer or the extension has not been registered in the system, 4PSA VoipNow transfers the call to another extension belonging to the same client account or an external phone number.
- Transfer to external – If the extension has assigned a billing plan that allows calls to external destinations, calls can be diverted to this destination. The called extension will be charged for these calls.
- Voicemail – If the extension is Phone terminal type, calls can be directed to voicemail directly.

- Number check – 4PSA VoipNow can apply the rule to the calls that match or do not match the phone number specified by the rule. The two possible values of this field are:
  - Matches – The incoming call matches the number
  - Does not match – The incoming call doesn't match the number
  - Is anonymous – The incoming call does not have Caller-ID information
- Pattern – The caller's phone number for all actions except Transfer on event when the field displays the event. This field can also contain a regular expression that matches an entire set of numbers. The three possible values for the transfer event are:
  - No answer - The call is considered unanswered.
  - Not registered - The number that the caller is trying to reach is not registered.
  - Busy - The number that the caller is trying to reach is engaged in another call.
- In time interval – The time interval when the rule will be executed
- To extension – In case the action is Transfer, this column displays an extension user name and number where the call will be redirected.

  In case the action is Transfer to external, this column displays an external phone number where the call will be redirected.

Add Incoming Call Rules

To add incoming call rules for a certain extension, click the chosen extension link in the Extension Management page and the  Incoming call rules icon available in the next page.

In the Add call rules section you can find buttons, textboxes, and dropdown lists allowing you to define one or more incoming rules. The following steps must be followed:

1. Use the first dropdown list to choose the action that will be performed, if the number is matched. The actions available are:
   - Busy – 4PSA VoipNow plays a "busy signal" to let the caller know that the number he is trying to reach is engaged in another call.
   - Congestion – 4PSA VoipNow plays a "fast busy signal" (known in telephony as a "congestion tone") to let the caller know that the call was unsuccessful.
   - Hang up – 4PSA VoipNow hangs up the incoming call.
   - Set call priority – 4PSA VoipNow sets a certain priority for the incoming call in order to be answered faster by the operators in a queue. This action is available only for extensions of type Queue.
   - Transfer – 4PSA VoipNow transfers the call to another extension on the same client account.
   - Transfer on event – If the extension user does not answer or the extension has not been registered in the system, 4PSA VoipNow transfers the call to another extension belonging to the same client account or an external phone number.
   - Transfer to external – If the extension has assigned a billing plan that allows calls to external destinations, calls can be diverted to this destination. The called extension will be charged for these calls.
   - Voicemail – If the extension is Phone terminal type, calls can be directed to voicemail directly.
2. Use the second dropdown list to choose whether the action will be performed for incoming calls that match or do not match the expression you will specify later at Step 3.
   - Matches – The incoming call matches the number
   - Does not match – The incoming call doesn't match the number
   - Is anonymous – The incoming call does not have caller ID information

> **Caution**
>
> Number matching is based on Caller-ID. If the remote party does not send a Caller-ID, no matching can be performed; however you can use the `Is anonymous` option to route anonymous calls.
>
> Pay attention to the `number` entry. You can specify the number as a combination of the digits 0-9 and the characters '+', 'X', 'Z', 'N', '[', ']', '.', '*' .
>
> The number entry supports the Asterisk number matching. You can enter an expression that matches multiple numbers. Remember that:
>
> X - matches any digit from 0-9
>
> Z - matches any digit form 1-9
>
> N - matches any digit from 2-9
>
> [] - matches any digit or letter in the brackets
>
> . - matches one or more characters
>
> * - matches 0, 1 or any number of the previous expression
>
> For example:
>
> - Number 0. will match any number starting with 0.
> - Number 1X[123]N will match any number starting with 1, followed by any digit between 0 and 9, followed by 1,2 or 3 and followed by any digit between 2 and 9.

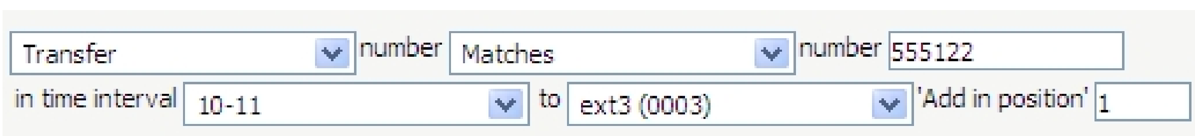
3. Use the first textbox to specify the extension number or a regular expression that matches the incoming call.
4. Use the third dropdown list to choose the time interval when calls must be checked.
5. Use the `Add in position` textbox to specify the order of the rule in the list.

> **Caution**
>
> The position of a rule in the group is very important because it defines the order in which 4PSA VoipNow verifies the call rules in case of an incoming call.
>
> The check is made in order and all rules are final (the program stops checking when the first rule is matched).

6. The actions `Set call priority`, `Transfer`, `Transfer to external` and `Transfer on event` have additional parameters.

- When you select the Set call priority action, 4PSA VoipNow displays an additional textbox. Use it to fill in the queue position where the call will be placed.
- When you select the Transfer action, 4PSA VoipNow displays an additional dropdown list. Use it to select the final extension destination of the call.
- When you select the Transfer to external action, 4PSA VoipNow displays an additional field. Use it to enter the number where you want the call diverted.
- When you select the Transfer on event action, 4PSA VoipNow displays several additional fields:
    - Use the first dropdown list to select the event when the transfer will be performed.
    - Use the second dropdown list to choose whether the call will be transferred to an internal or external number.
    - Use the last control (dropdown list or textbox) to specify the final destination of the call.

The example below means that if a call from number 555122 arrives at 13:30, the call is transferred to extension 0006.



Example of a valid incoming rule

7. Use the buttons to add several new call rules at the same time. Click the button to add a new set of buttons, textboxes, and dropdown lists allowing you to create an additional rule. Click the button to delete its corresponding rule.
8. Click OK to add the new rule(s) to the list. Click Cancel to go back to the previous page without changing the incoming rules.

Change the Order of the Call Rules

The position of a rule in the group is very important because it defines the order in which 4PSA VoipNow verifies the call rules in case of an incoming call. The program verifies the conditions of the rules and stops checking when it finds the first rule whose conditions are true.

If you want to change the order of the incoming call rules, click the chosen extension link in the Extension Management page. Next, click the Incoming call rules icon and follow these steps:

1. In the call rule list, use the up and down buttons to change the position of a certain rule inside the group.
2. To move a certain rule to a higher position, click the up arrow. To move a certain rule to a lower position, click the down arrow.

> **Note**
>
> When you change the order of the call rules in the list, 4PSA VoipNow displays the number of changes you have performed to remind you to save them before navigating away from the page. In the top left corner of the call list 4PSA VoipNow displays `{x} pending changes`.

3. Click the Apply changes link to save the changes you have made on the list of call rules.

Delete Call Rules

To remove incoming call rules from an extension account, click the chosen extension link in the Extension Management page. Next, click the Incoming call rules icon. Choose the rules you want to delete by selecting their corresponding checkboxes. Then click the Remove selected link. You will be asked to confirm the removal.

> **Note**
>
> There is an implicit rule that accepts ALL calls from ALL destinations in ANY time interval that is not shown!

Manage Extension's Outgoing Call Rules

4PSA VoipNow allows extension users to block certain outgoing calls, based on the dialed number and the time interval when the call was placed. This feature is very useful when several people use the same phone but only one of them has access to the extension account in the 4PSA VoipNow interface.

View Extension's Outgoing Call Rules

To access extension's call rules, click the name of the extension in the Extension Management page, and then click the Outgoing call rules icon available in the Tools area.

In the Outgoing Routing Rules Management page, you can view a list of the routing rule groups available in the extension account.

4PSA VoipNow displays the following information on each group:

- S – The status of the rule, displayed using an icon: Enabled or Disabled. Click this icon to change the status of the rule.
- Action – The action performed when 4PSA VoipNow matches the number dialed by the user.
- Number – The number chosen to match the number dialed by the extension user.
- In time interval – The time interval when the rule will be executed.

Add an Outgoing Call Rule

To add outgoing call rules to the system, click the name of the extension in the Extension Management page, and then click the Outgoing call rules icon available in the Tools area.

In the Add new outgoing routing rules section you can find buttons, textboxes, and dropdown lists that allow you to define one or more routing rules for outgoing calls. Follow these steps:

1. Use the first dropdown list to choose the Block action.

   4PSA VoipNow blocks the call to that number if the number is matched.

2. Use the number textbox to match the number dialed by the extension user.

> **Caution**
>
> Pay attention to the number entry. The number supports the Asterisk number matching system. You can enter an expression that matches multiple numbers. Remember that:
>
> X - matches any digit from 0-9
>
> Z - matches any digit form 1-9

N - matches any digit from 2-9

[] - matches any digit or letter in the brackets

. - matches one or more characters

* - matches 0, 1 or any number of the previous expression

For example:

- Number 0. will match any number starting with 0.
- Number 1X[123]N will match any number starting with 1, followed by any digit between 0 and 9, followed by 1,2 or 3 and followed by any digit between 2 and 9.

3. Use the third dropdown list labeled `if in time interval` to select the time interval when this rule applies.

Caution

The `Block` rule is final. This means that when the rule is matched, other rules are no longer checked.

4. Click `OK` to add the new routing group to the system. Click `Cancel` to go back to the previous page without adding the rule group.

Delete Outgoing Call Rule

To remove call rules from the system, click the Outgoing call rules icon in the Extension Management page, in the Tools area. Next, choose the rules you want to delete by selecting their corresponding checkboxes in Existing Rules section. Then click the Remove selected link. You will be asked to confirm the removal.

Manage Extension's Recorded Calls

4PSA VoipNow allows the recording of conversations for extensions of type phone terminal and queue. When the call recording feature is enabled, in Recorded Messages page, you can view a list of the calls recorded by the extension owner. Multiple operations can be performed on these recorded calls.

- Search for specific calls
- Download recorded conversations on your computer

- Delete recorded conversations
- Activate/Deactivate the call recording feature (this operation is available only for phone terminal extensions)

To access recorded calls on an extension account, click the chosen extension link in the Extension Management page. Next, click the Recorded calls icon.

Note

The **Recorded calls** icon is available in the following cases:

- If the extension type is Phone Terminal and the call recording feature is enabled.
- If the extension type is Queue and the call recording feature is enabled.

4PSA VoipNow displays the following details for each recorded call:

- T – The type of the call, displayed using an icon: Incoming or Outgoing.
- File – The name of the file; it is automatically generated by 4PSA VoipNow using a format that is specific to the extension type:
  - For phone terminals: date_time-type.ext (e.g. 20051230_182345-in.wav). Click this link to download the recording file.
  - For queues: date_time-agentnumber.ext (e.g. 20051230_182345-0001*0002.wav). Click this link to download the recording file.
- Size – The size of the recording file
- Created – The date when the conversation recording started

Search the Call List

When the recorded conversation list is too long and you are searching for specific recordings, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the recorded calls whose File field contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the `Number of entries per page` link. The number of entries per page is shown in the left side of the table along with the total number of conversations recorded.

Another way to simplify the listing is to sort the recorded conversations by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Delete Recorded Calls

To remove recorded conversations from an extension account, click the chosen extension link in the Extension Management page. Next, click the Recorded calls icon.

> **Note**
>
> The **Recorded calls** icon is available in the following cases:
>
> - If the extension type is `Phone Terminal` and the call recording feature is enabled.
> - If the extension type is `Queue` and the call recording feature is enabled.

Choose the recordings you want to delete by selecting their corresponding checkboxes. Then click the Remove selected link. You will be asked to confirm the removal.

Enable or Disable Call Recording

- Activate Recording – Use this icon to activate call recording.
- Deactivate Recording – Use this icon to deactivate call recording.

Manage a Phone Terminal's Voicemail Mailbox

When an extension is unavailable or engaged in a call, the person trying to reach that extension can leave a message, if the extension has this feature enabled.

In the Mailbox Management page, you can view a list of the voicemail messages recorded for the selected extension. Multiple operations can be performed:

- Search for specific messages
- Download message files on your computer
- Delete voicemail messages
- Activate/Deactivate the Voicemail feature

To access recorded calls on an extension account, click the chosen extension link in the Extension Management page. Next, click the Mailbox calls icon.

> Note
>
> The **Mailbox** icon is available only if the extension is Phone Terminal type and the Voicemail feature is enabled.

4PSA VoipNow displays the following details for each voicemail message:

- P – The priority of the message, displayed using an icon:
  - normal
  - attention
  - urgent

  These priority levels are generated when the message is recorded by interrogating the person that leaves the message.
- From – The Caller-ID and extension of the person that left the Voicemail message. Click this link to download the message file.
- Folder – The folder where the message file was stored.
- Size – The size of the message file
- Created – The date when the voicemail message was recorded
- Length – The length of the message displayed in the following format: hours : minutes : seconds.

You can force the update of this page by clicking the Refresh icon available in the top right side of the main frame.

Search the Message List

When the messages list is too long and you are searching for specific messages, you can use the following features:

- Search – Write the text you are looking for in the textbox (you can also search for a specific folder). Then click the button or the Search label to display only the messages whose From field contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of messages.

Another way to simplify the listing is to sort the message list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Check Your Messages

When you want to listen to your voice messages, you can:

- Use your computer – This method is described in this section
- Use your phone – This can be done by calling *95 from your local phone. If you want to listen to your messages from a remote location, you can call your extension public phone number and then dial * during the voicemail invitation message.

Download Messages on Your Computer

To download Voicemail messages on your computer, click the chosen extension link in the Extension Management page. Next, click the Mailbox calls icon and follow the steps:

1. In the From column of the message table, click the link corresponding to the message you want to download. A download dialog box appears displaying information about the file you have selected.

   > **Note**
   >
   > 4PSA VoipNow names the message file using the standard format `msg{xxxx}.ext`, where `{xxxx}` is a number automatically assigned by 4PSA VoipNow and `ext` is the sound file extension.

2. Save the file on your local computer.
3. Now you can locate the downloaded message on your computer and play it using your favorite media player.

> **Note**
>
> Once you have downloaded a voice message, the message is marked as read and automatically moved from the **INBOX** folder to the **OLD** folder.

Manage Greetings

To access this page, click the Manage Greetings button in the Mailbox Management page. A new page opens allowing you to enter information about the new greeting file, to search or delete the existing greeting files.

The information on the new greeting file in grouped in the *Upload Greeting* section:

- Greeting type – Use the drop down list to select the type of greeting file that will be added.
- Greeting file – Use the Browse button to locate the greeting file on your computer.

Click Cancel to go back to the previous page without adding the greeting file or OK to proceed with the upload.

4PSA VoipNow displays the following information on each greeting file:

- Listen to greeting – The name of the greeting file. Click the link to listen it.
- Greeting type – The type of the greeting file.
- Size – The size of the greeting file in Kb .

- File created – The date when the greeting file was added to the system.

Search the Greeting Files List

When the file list is too long and you are searching for specific greeting files, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the greeting files whose names contain the text.
- Show all – Click this button or the Show all label to display the entire list.

The search criteria will be retained even if you navigate to other pages until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of greeting files in the system.

Another way to simplify the listing is to sort the greeting file list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Remove Greeting Files

Choose the files you want to delete by selecting their corresponding checkboxes. Then click the Remove selected link. You will be asked to confirm the removal.

Delete Messages

To remove recorded Voicemail messages from an extension account, click the chosen extension link in the Extension Management page. Next, click the Mailbox icon. Choose the messages you want to delete by selecting their corresponding checkboxes. Then click the Remove selected link. You will be asked to confirm the removal.

Enable or Disable the Mailbox

- Activate Voicemail – Use this icon to activate the voicemail mailbox.

- Deactivate Voicemail – Use this icon to deactivate the voicemail mailbox.

Manage a Phone Terminal's Fax Messages

4PSA VoipNow allows extensions of type phone terminal to receive fax messages and manage them through the 4PSA VoipNow control panel. When the fax center feature is enabled, in the Fax messages management page you can view a list of the faxes received by the extension. Multiple operations can be performed on these files.

- Search for specific fax messages
- Download fax files on your computer
- Delete fax messages
- Enable/Disable the fax center

To access the fax messages associated with an extension account, click the chosen extension link in the Extension Management page. Next, click the Fax Center icon.

4PSA VoipNow displays the following details for each fax message:

- T – The type of the call, displayed using an icon: Incoming or Outgoing.

> **Note**
>
> 4PSA VoipNow version 1.5.0 supports only the management of incoming faxes.

- From – The Caller Subscription ID of the fax machine that sent the fax message. Click this link to download the fax file on your computer.
- Pages – The number of pages of the fax
- Size – The size of the fax file
- Created – The date when the fax file was created on the server

> **Note**
>
> New messages are displayed in bold style.

Search the Fax Message List

When the fax list is too long and you are searching for specific faxes, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the fax messages whose From field contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages, the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of fax messages.

Another way to simplify the listing is to sort the fax messages by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Delete Fax Messages

To remove fax messages from an extension account, click the chosen extension link in the Extension Management page. Next, click the Fax Center icon.

Choose the fax files you want to delete by selecting their corresponding checkboxes. Then click the Remove selected link. You will be asked to confirm the removal.

Enable or Disable Fax Center

- Enable Fax Center – Use this icon to enable the fax center option.
- Disable Fax Center – Use this button to disable the fax center option.

Manage Phone Terminal's Number Collections

Phone Number Collections can be used for screening the outgoing calls of a phone terminal extension. For more information, please read the Call Screening section.

To access the extension's **Phone Numbers Collections** page, click the chosen extension's **name** link in the **Client Management** page. A new page opens containing button links to all specific client operations. Next, click on the **Phone numbers collection** icon available in the **Tools** area.

The **Phone Numbers Collections** page displays a list of all phone numbers that are assigned to categories. The following information is available:

Number - Screening number

Category - The category the screening number belongs to

Tag - Identification tags

Owner - The owner of the category

Adding a screening number

To add a screening number, click the **Add number** icon, located in the **Tools** area of the **Phone numbers collections management** page.

> **Note**
>
> In order to add screening numbers, at least one category must be defined.

Screening numbers can be imported from a file or added manually from the web interface.

If you wish to import the screening numbers from a file, select the **Import numbers from file** checkbox. Specify the location of the file containing the screening numbers in the **Import file** textbox, or use the **Browse** button to locate it. Specify the field separator character in the **Field separator** textbox (the default character is ',' - **comma**) and then press **OK**.

The entries in the uploaded file must be in the following format:

`{phone number},{category_name}`

Phone Number Categories

In order to add screening number, at least one category must be defined.

To access the Categories management page, click the Categories icon in the Phone number collection management page.

The Categories page displays the existing categories. The following information is available:

Category - The name of the category

Tag - Identification tags

Inheritance level - If the Inheritance level is 1, the screening of the respective category will be applied to all the extension accounts under the respective client account; if the inheritance level is 0, the screening will not be applied

If you wish to edit a category, click the respective category's name.

To add a new category, you must submit the information required in the Modify category section located at the top of the page.

Call Screening

The Call Screening feature allows you to define phone numbers that cannot be called by the respective phone terminal extension.

> **Note**
>
> In order to filter calls, you must first define phone number categories. Please read the Manage Extension's Phone Number Collections section for more information.

To access the Call Screening management page, click the respective extension's name in the Extension Management page, then click the Screening icon.

In the new page that opens, you are able to define the rules for filtering calls:

Screening behaviour - Defines the behaviour of the screening feature. The following options are available:

- Do not use filtering - All outgoing calls are allowed, no filtering is applied.

- Filter calls to selected numbers - This option allows you to specify phone numbers the extension will not be able to call. When this option is selected, the following sections are available:
  - Screen all calls to numbers in - The extension will not be able to call the phone numbers from the categories that are assigned to be screened. To assign categories, select them from the Available categories list and click the >>> button.

    The Assigned categories list contains all the categories that are screened. To delete categories from this list, select them and click the <<< button.
  - But allow calls to - This section contains the categories that can be called, OVERRIDING the screening rules set in the Screen all calls to numbers in section.

    To assign categories to the override list, select them from the Available categories list and click the >>> button.

    The Assigned categories list contains all the categories that override the filtering rules. To delete categories from this list, select them and click the <<< button.
- Permit only calls to selected numbers - When this option is selected, the extension will be able to call only the numbers from the assigned categories.

  To assign categories, select them from the Available categories list and click the >>> button.

  The Assigned categories list contains all the categories containing numbers that can be called. To delete categories from this list, select them and click the <<< button.

View a Phone Terminal's Queue Membership

In this page, you can view a list of queues in which the extension is agent and set the queue login password required to connect to the queue.

To access this page, click the chosen extension link in the Extension Management page. Next, click the  Queue member icon available in the Tools area.

Note

The Queue member icon is available only if the extension is `Phone Terminal` type, agent in a queue and the `multi-user aware` permission is enabled.

To set the queue login password, fill in the `Queue login password` textbox with 1 up to 4 digits and click the OK button. This password will be required when dialing *96 or *97 to login as agent in queue. 4PSA VoipNow displays the `Old queue login password` field, if the extension has had a previous password.

View the Queue List

4PSA VoipNow displays the following information on each queue that includes the current extension:

- S – The status of the queue in which the extension is member, displayed using an icon: Enabled and Disabled. Click the icon to change the queue's status.
- V – The role of the extension in the queue: specifies that the extension user is a supervisor and specifies a regular agent. Click the icon to change the role of the extension in the queue.
- Name – The name of the queue in which the extension is member. Click the link to go to the queue extension context.
- Penalty – This value determines the order in which 4PSA VoipNow tries to assign calls to the agents. When a call is received, 4PSA VoipNow first applies the distribution algorithm to the set of agents with `Penalty = 1`. If no available agent is found, 4PSA VoipNow applies the algorithm to the agents with `Penalty = 2` and so on. Agent with high `Penalty` values will be assigned fewer calls normally.
- Since – The date when the extension become member in the queue

Search the Queue List

When the queue list is too long and you are searching for specific queues, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the queues whose names contain the text.

- **Show all** – Click this button or the **Show all** label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the **Number of entries per page** link. The number of entries per page is shown in the left side of the table along with the total number of queues.

Another way to simplify the listing is to sort the queue list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Manage Queue Agents

To access the **Queue Agents Management** page, click the **Queue Agents** icon located in the **Tools** section of the respective queue extension's management page.

All the agents

S - The icon in this column shows the status of the agent: - agent is logged in; - agent is logged off.

V - The icon in this icon shows the type of the agent: - agent is a normal queue member; - agent is a queue supervisor.

Agent - The agent's phone terminal extension.

Last logged in - The date and time when the agent last logged in.

Last logged off - The date and time when the agent last logged out.

Average logged - The average duration of the agent's login sessions.

Penalty - The agent's penalty number. For more information, please read the Editing A Queue Agent section.

Calls - The number of calls accepted by the agent.

Connected to - The phone terminal extension where the agent is connected from.

Editing a queue agent

To edit a queue agent, click it's phone terminal extension in the Agent column, in the Queue Agents Management page.

The new page that opens allows you to configure the following parameters:

Supervisor - Use the available dropdown list to specify whether the agent is a supervisor or not.

Penalty - Use the available textbox to specify the penalty number of the respective agent. The Penalty can be used to differentiate agents on levels. The call distribution algorithm will be applied on the agents with the lowest penalty number. If the are no agents available with the lowest penalty number , the algorithm will be applied on the agents with the next higher penalty number.

For example, let's assume you have a queue served by 4 agents. Agent A and Agent B have 1 as penalty r; Agent C and agent D have 2 as penalty. When a call arrives, 4PSA VoipNow will apply selected the distribution algorithm on agents A and B, which have the lowest penalty number (1). If Agent A and Agent B are unavailable, 4PSA VoipNow will apply the call distribution algorithm on agents B and C, which have 2 as penalty.

In this page you can also see a quick report on the selected queue agent. The following details are displayed:

Last logged in - The date and time when the agent last logged in.

Last logged off - The date and time when the agent last logged out.

Average logged in time - The average duration of the agent's login sessions.

Number of completed calls - The number of completed calls.

Average call time - The average time interval (in seconds) an agent spent in a conversation.

Average hold time - The average time interval (in seconds) an agent spent on hold.

Connected to - The phone terminal extension where the agent is connected from.

View Reports on the Queue Activity

The Queue Report page includes relevant metrics (displayed in tables and graphics), that can be used for reviewing the activity of the queue operators.

To access this page, click the respective extension's name, then click the Queue report icon available in the Tools area.

Queue Report Overview

To access this page, in the Queue Report toolbar click the Overview tab.

The information is structured in several sections:

- Queue overview – This section displays general statistic data on the selected queue.
    - Total answered calls – The total number of calls answered by queue's agents
    - Total unanswered calls
    - Total number of calls
- Answered calls
    - Total calls ended by agent – The total number of answered calls that were ended normally by queue's agents
    - Total calls ended by caller – The total number of answered calls that were ended normally by the person who called the queue
    - Total number of transferred calls – The total number of calls that were transferred from the queue to an extension
- Unanswered calls
    - Calls dropped due to channel incompatibility – The total number of calls answered by an agent, but dropped because the communication channels were not compatible
    - Calls ended due to caller abandon – The total number of calls that entered the queue and callers hang-up before speaking to an agent
    - Calls that exit the queue due to timeout – The total number of calls that exited the queue when the caller was on hold too long and the timeout was reached
    - Calls ended due to no members - The total number of calls that were ended due to the fact that no member was available at that moment
    - Calls ended due to no members logged in - The total number of calls that were ended due to the fact that no members were logged in at that moment.

- Calls ended due to all members unavailable - The total number of calls that were ended due to the fact that all the members were unavailable at that moment
- Calls ended due to all members logged out - The total number of calls that were ended due to the fact that all the members were logged out at that moment
- Calls ended due to queue full - The total number of calls that were ended due to the fact that the queue was full at that moment

- Call duration
  - Avg call length (completed calls) - The average call length for completed calls
  - Avg hold time (completed calls) - The average on hold time for completed calls
  - Avg hold time (abandoned calls) - The average time spent by the callers in the queue before abandoning the call
- >Call completion
  - Avg pos when callers abandon - The average position of the callers when they abandon the call
  - Avg pos advanced (abandoned calls) - The average number of positions that the callers advanced in the queue before they abandoned the call
  - Avg init pos for completed calls - The average initial position of the callers who completed the calls

Answered Calls Report

To access this page, in the Queue Report toolbar click the Answered Calls tab.

- Queue Overview – This section displays the following statistics about call duration and caller waiting intervals:
  - Total number of answered calls
  - Average call length
  - Minimum call length – 4PSA VoipNow also displays the date and time of the conversation as well as the agent responsible for it
  - Maximum call length – 4PSA VoipNow also displays the date and time of the conversation as well as the agent responsible for it

- Total call length
- Average call waiting time
- Minimum call waiting time
- Maximum call waiting time
- Total waiting time

- Queue Agents – This section displays the following statistics about each operator in the queue:
  - Agent – The number of the operator's extension as well as his/her status in the queue (logged in or not logged in). Click this link to open the agent's Agent status and view statistics about his/her activity.
  - Calls – The numbered of answered calls registered by the operator
  - Percent – The operator's percentage of answered calls out of the total number of answered calls
  - Graphic – A graphic representation of the percentage value
- Service level agreement – This section displays statistics for the intervals that the callers spent waiting in queue.
  - Answered – The waiting time interval
  - Calls – The number of answered calls in Answered period
  - Percent – The percentage of answered calls in Answered period from the total calls answered
  - Graphic – A graphic representation of the percentage of answered calls
- Disconnection causes – This section displays statistics about how calls are terminated:
  - Cause – There are 3 possible reasons for terminating a call: the agent hung up, the caller hung up or the call was transferred to an extension outside the queue
  - Calls – The number of calls that were terminated that way
  - Percent – The percentage represented by the disconnection cause out of the total number of calls
  - Graphic – The graphic representation of the percent value

To filter the records displayed on this page you can use the following controls:

- Report starts on – Use the textbox to fill in a date in the following format yyyy-mm-dd. Use the button to display a calendar and select the desired date.
- Report ends on – Use the textbox to fill in a date in the following format yyyy-mm-dd. Use the button to display a calendar and select the desired date.
- Click the button to display only the desired records.

> **Note**
> The dates are saved even if you navigate to other pages. All the other queue statistics pages available from the toolbar will display records from the same time interval.

- Click the Default link to reset the Report starts on and Report ends on values to their default values corresponding to the current month.

Unanswered Calls Report

To access this page, in the Queue Report toolbar click the Unanswered Calls tab.

- Queue Overview – This section displays the following statistics about call duration and caller waiting intervals:
  - Total number of unanswered calls
  - Average wait time before disconnection
  - Minimum wait time before disconnection
  - Maximum wait time before disconnection
  - Total wait time before disconnection
  - Average queue position at disconnection
  - Minimum queue position at disconnection
  - Maximum queue position at disconnection
- Service level agreement – This section displays statistics for the intervals that the callers spent waiting before the call was terminated.
  - Hangup – The waiting time interval
  - Calls – The number of unanswered calls in Hangup period
  - Percent – The percentage of unanswered calls in Hangup period from the total calls answered

- Graphic – A graphic representation of the percentage of unanswered calls

- Disconnection causes – This section displays statistics about how calls are terminated:
  - Cause – There are several possible reasons for terminating a call:
    - Call abandoned by caller – This happens when the caller hangs up before being connected to an agent.
    - Call abandoned by agent – This happens when an agent hangs up during the pick-up announcement or the delay before connecting to the caller.
    - Call disconnected due to channel incompatibility – This happens when there are differences between the list of codecs used on the agent's channel and list of codecs used on the caller's channel.
    - Call transferred with key – This happens when the caller presses a key on his/her phone pad while waiting to be connected to an agent.
    - Call timeout – This happens when the caller's waiting time exceeds the maximum waiting time set for the queue (i.e. the queue's timeout).
    - Call disconnected due to no members – This occurs when a call arrives and there but no queue agents have logged in yet.
    - Call disconnected due to no members logged in – This occurs when a call arrives on position number 1 but there are no agents available to take the call.
    - Call disconnected due to event that all queue members disconnected – This occurs when a call arrives and but all queue agents have logged out.
    - Call disconnected due to event that all queue members logged out – This occurs when a call arrives on position number 1 but while waiting, all agents have logged out.
    - Call disconnected due to event queue full – This occurs when a call arrives and the maximum numbers of callers waiting in queue has already been reached.
  - Calls – The number of calls that were terminated that way
  - Percent – The percentage represented by the disconnection cause out of the total number of calls
  - Graphic – The graphic representation of the percent value

To filter the records displayed on this page you can use the following controls:

- Report starts on – Use the textbox to fill in a date in the following format yyyy-mm-dd. Use the button to display a calendar and select the desired date.
- Report ends on – Use the textbox to fill in a date in the following format yyyy-mm-dd. Use the button to display a calendar and select the desired date.
- Click the button to display only the desired records.

> **Note**
>
> The dates are saved even if you navigate to other pages. All the other queue statistics pages available from the toolbar will display records from the same time interval.

- Click the Default link to reset the Report starts on and Report ends on values to their default values corresponding to the current month.

Calls Distribution Report

To access this page, in the Queue Report toolbar click the Calls Distribution tab.

This page displays a series of statistics computed for different time intervals (day, weekday, hour) and different types of objects (answered calls, call waiting, unanswered calls):

- Answered calls per day
  - Day
  - Calls
  - Percent
  - Average call duration
  - Minimum call duration
  - Maximum call duration
  - Graphic
- Call wait time per day
  - Day
  - Calls
  - Percent

- Average call wait
- Minimum call wait
- Maximum call wait
- Graphic
- Unanswered calls per day
  - Day
  - Calls
  - Percent
  - Average time to hangup
  - Minimum time to hangup
  - Maximum time to hangup
  - Graphic
- Answered calls per weekday
  - Weekday
  - Calls
  - Percent
  - Average call duration
  - Minimum call duration
  - Maximum call duration
  - Graphic
- Call wait time per weekday
  - Weekday
  - Calls
  - Percent
  - Average call wait
  - Minimum call wait
  - Maximum call wait
  - Graphic
- Unanswered calls per weekday
  - Weekday
  - Calls

  - Percent
  - Average time to hangup
  - Minimum time to hangup
  - Maximum time to hangup
  - Graphic
- Answered calls per hour
  - Hour
  - Calls
  - Percent
  - Average call duration
  - Minimum call duration
  - Maximum call duration
  - Graphic
- Call wait time per hour
  - Hour
  - Calls
  - Percent
  - Average call wait
  - Minimum call wait
  - Maximum call wait
  - Graphic
- Unanswered calls per hour
  - Hour
  - Calls
  - Percent
  - Average time to hangup
  - Minimum time to hangup
  - Maximum time to hangup
  - Graphic

To filter the records displayed on this page you can use the following controls:

- Report starts on – Use the textbox to fill in a date in the following format yyyy-mm-dd. Use the button to display a calendar and select the desired date.
- Report ends on – Use the textbox to fill in a date in the following format yyyy-mm-dd. Use the button to display a calendar and select the desired date.
- Click the button to display only the desired records.

> **Note**
>
> The dates are saved even if you navigate to other pages. All the other queue statistics pages available from the toolbar will display records from the same time interval.

- Click the Default link to reset the Report starts on and Report ends on values to their default values corresponding to the current month.

Agents Report

To access this page, in the Queue Report toolbar click the Agents Report tab.

- Queue overview
  - No of agents
  - Average logged in time
  - Minimum logged in time
  - Maximum logged in time
  - Total agents time
  - Average on pause time
  - Minimum on pause time
  - Maximum on pause time
  - Total agents pause time
- Agent Availability
  - Agent – Click this link to open the agent's Agent status page and view statistics about his/her activity.
  - Logged in time
  - On pause time

- Effective time

- Agent Sessions
  - Agent – Click this link to open the agent's Agent status and view statistics about his/her activity.
  - Sessions – Click this link to open the agent's Agent session details page and view statistics about the sessions of the agent.
  - Average time per session
  - Pauses
  - Average time per pause
  - Pause %
  - Pauses per session
- Answered calls
  - Agent – Click this link to open the agent's Status page and view statistics about his/her activity.
  - Calls – Click this link to open the agent's Agent calls page and view statistics about the calls assigned to the agent.
  - Total call time
  - Average call time
  - Average wait time
  - % of queue calls
  - Graphic

To filter the records displayed on this page you can use the following controls:

- Report starts on – Use the textbox to fill in a date in the following format yyyy-mm-dd. Use the button to display a calendar and select the desired date.
- Report ends on – Use the textbox to fill in a date in the following format yyyy-mm-dd. Use the button to display a calendar and select the desired date.
- Click the button to display only the desired records.

> **Note**
>
> The dates are saved even if you navigate to other pages. All the other queue statistics pages available from the toolbar will display records from the same time interval.

- Click the Default link to reset the Report starts on and Report ends on values to their default values corresponding to the current month.

Agent Status

This page can be accessed by clicking the agent extension number in one of the following statistics pages Answered Calls Report and Agents Report.

The page displays general statistics about the status of an agent and his/her sessions:

- Status
- Logged in – The number of times the agent has logged in the queue
- Average logged in – The average length of the agent's sessions
- Minimum logged in – The length of the agent's shortest session
- Maximum logged in – The length of the agent's longest session
- Paused – The number of times the agent used the pause feature (i.e. dialed *96EXTENSION_NUMBER on his/her phone)
- Average on pause time – The average length of the agent's pauses
- Minimum on pause time – The length of the agent's shortest pause
- Maximum on pause time – The length of the agent's longest pause
- Calls – The total number of calls assigned to the agent in the reported time period

Agent Session Details

This page can be accessed by clicking the number of sessions corresponding to an agent on the Agents Report page.

The page displays detailed statistics about the sessions of an agent:

- Login hour – The start time of the session
- Logout hour – The end time of the session

- Duration – The length of the session
- Logged in from – Agents can log in a queue from any phone connected to the 4PSA VoipNow system (the phone associated with the agent's extension or another phone associated with another extension). This column specifies the extended number of the extension associated with the phone used by the agent during the session.
- Pauses – The number of times the agent used the pause feature (i.e. dialed *96EXTENSION_NUMBER on his/her phone)
- Pause time – The total duration of the agent's pauses

Agent Calls

This page can be accessed by clicking the number of calls answered by an agent on the Agents Report page.

The page displays detailed statistics about the calls assigned to an agent:

- Caller-ID – The ID of the caller
- Caller-ID – A unique ID generated for each call.
- Start time
- End time
- Duration – The length of the conversation
- Call wait – The time the caller had to wait before being connected to the agent
- Call ended with – The reason the call was terminated

Design an IVR's Behavior

4PSA VoipNow separates the IVR creation from the designing of the IVR's behavior. To define the IVR menu and the caller's possibilities to interact with the system, click the IVR icon in the IVR extension management page. The IVR Management page opens allowing you to perform the following operations:

- Manage IVR contexts
- Manage options and actions associated with the contexts
- Generate IVRs
- View and Correct IVR Structural Errors

IVR Components

In 4PSA VoipNow an IVR is made up of a group of context. There are two types of contexts: regular and entry contexts. A regular context is a container for one or more options, each option consisting of a sequence of actions. An entry context is the context where the caller is directed when the IVR answers a call.

> **Note**
>
> There can be only one entry context for an IVR. The entry context must have one or more actions defined for its start option (the option that is executed automatically without caller intervention).

Add a New Context

1. In the Tools area, click the Add context button.
2. In the new page that opens use the available controls to configure the basic settings of the context:
   - **Name** – Fill in this textbox a descriptive name for the new context
   - **This is the entry context** – Enable this checkbox if you want to set the new context as the entry context for the IVR

   > **Note**
   >
   > If you have previously created and defined another entry context, 4PSA VoipNow will keep the new context as entry and set the initial context as regular.
3. Click **OK** to create the context. Click **Cancel** to abandon the operation and return to the previous page.

> **Note**
>
> The context you have just created is similar to an empty container. To fill it with options and actions, see the following sections.

Add options and actions

1. In the **Contexts** area, click the name of the context that you want to fill with options.

2. In the new page that opens, 4PSA VoipNow lists all the possible options. For each option, 4PSA VoipNow displays the following information:

- A – This column displays if the option contains actions and if the option is empty.
- Option – This column displays the names of the available options:
  - start – The sequence of actions executed when the caller reaches the context.
  - timeout – The sequence of actions executed when the caller remains inactive for the timeout time interval defined for the IVR
  - invalid – The sequence of actions executed when the caller presses a key (0–9, *, #) that has no action associated with it.
  - 0–9, *, # – The sequence of actions executed when the caller presses the corresponding key on his/her phone pad.
- Actions – This is the number of actions defined for the option.
- Created – This is the date when the first action was activated for the option.

3. To activate an option you must define the sequence of actions associated with it. To do this, click the name of the option. A new page opens allowing you to add a sequence of actions.

4. The controls on this page are grouped in several sections:

- Add action – Use this section to choose the action you want to add to the chosen option.
  - Action – Use this dropdown list to select one of the available actions.
  - Description – This is a description of the action you selected.
  - Add in position – Use this textbox to specify the sequence of actions associated to the option.
- Action details – The content of this section depends on the action selected in the Add action section:
  - Alter Caller-ID Name with recorded variable – Choose one of the available actions (Prepend, Append, Replace) to modify the Caller-ID Name by using the contents of a variable.

    {action} Caller-ID Name with recorded value {variable} – Use the dropdown list to select the action and the textbox to fill in the name of the variable you want to use.

- Alter Caller-ID Name with value – Choose one of the available actions (Prepend, Append, Replace) to modify the Caller-ID Name by using a static value.

  {action} Caller-ID Name with value {number} – Use the dropdown list to select the action and the textbox to fill in the value you want to use.

- Alter Caller-ID with recorded variable – Choose one of the available actions (Prepend, Append, Replace) to modify the Caller-ID by using the contents of a variable.

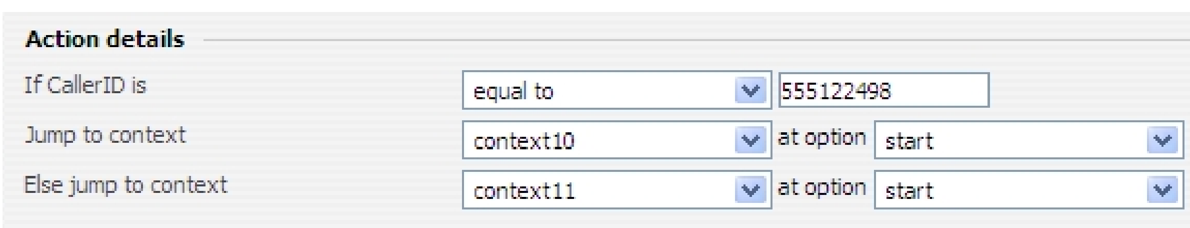
  {action} Caller-ID with recorded value {variable} – Use the dropdown list to select the action and the textbox to fill in the name of the variable you want to use.

- Alter Caller-ID with value – Choose one of the available actions (Prepend, Append, Replace) to modify the Caller-ID by using a static value.

  {action} Caller-ID with value {number} – Use the dropdown list to select the action and the textbox to fill in the value you want to use.

- Caller-ID based jump - Jumps to another context based on the caller ID of the received call.

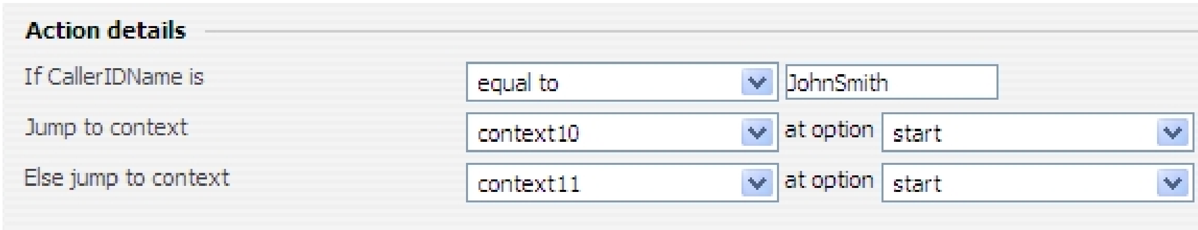
  If Caller-ID is {relation} {number} Jump to context {context} at option {option} Else jump to context {context} at option {option} – Use the dropdown lists to select the destination of the jump (context and option). Use the other controls to define the condition of the jump. See the example below:



Example of a valid 'Caller-ID based jump' action

- Caller-ID Name based jump - Jumps to another context based on the Caller-ID of the received call.

  If Caller-ID Name is {relation} {number} Jump to context {context} at option {option} Else jump to context {context} at option {option} – Use the dropdown lists to select the destination of the jump (context and option). Use the other controls to define the condition of the jump. See the example below:



Example of a valid 'Caller-ID Name based jump' action

- Digit to string association – Replaces the contents of a variable with a string.

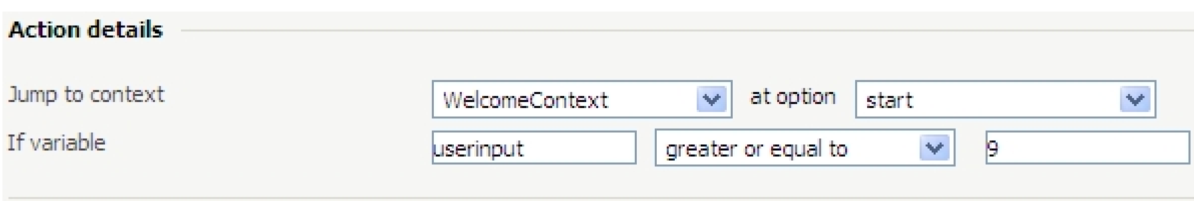
  Associate variable {variable} with string {string} – Use the two textbox to fill in the name of the variable and the string to be used.

- Hangup after for X seconds – Terminates the call after a given time period.

  Hangup after for {x} seconds – Use the textbox to specify the time interval after which the call will be terminated.

- Jump to context – Jumps to another context based on the evaluation of a given condition.

  Jump to context {context} at option {option} if {variable} {relation} than {number} – Use the dropdown lists to select the destination of the jump (context and option). Use the other controls to define the condition of the jump. See the example below:



Example of a valid 'Jump to context' action

- Play directory – Transfers the call to one of the extensions in the company directory. The caller selects the destination extension through the phone keypad.

- Play recorded variable – Plays one or more sound files to communicate the contents of a variable.

  Play recorded value {variable} as {style} – Use the textbox to fill in the name of the variable and the dropdown lists to select how the value will be pronounced. Use the {speaker} dropdown list to choose if the value will be pronounced as individual digits, as a number or as phonetics.

- Play sound file – Plays a given sound file for the caller.

Play in {style} the sound {folder} {sound}

- Play value – Plays one or more sound files to communicate a given value.

  Play value {number} as {style} – Use the textbox to fill in the value. Use the {speaker} dropdown list to choose if the value will be pronounced as individual digits, as a number or as phonetics.

  > **Note**
  >
  > The {speaker} dropdown list is enabled only when you select Number from the {style} list.

- Record digits to variable – Saves the digits typed by the caller on his phone pad into a given variable.

  Record {number of digits} to variable {variable} – Use the textbox {number of digits} to specify the number of digits expected for the caller input. Use the {variable} textbox to fill in the name of the variable where the input will be stored.

  Stop recording after {x} seconds of inactivity – Use the textbox to specify. The values allowed range from 1 to 9. The default value is 5 seconds.

  Play before starting recording {sounds} – This option allows you to play a sound file before recording the caller's input.

- Set language to chosen language – Sets the language of the call. All the sounds played for the caller will be in the selected language.

  Set language to code {language} – Use the dropdown list to select the language.

- Set language to recorded language {language} – Sets the language of the call by using the contents of a given variable. All the sounds played for the caller will be in the chosen language.

  Set language to recorded value {variable} – Use the textbox to fill in the name of the variable that contains the code of the language.

- Time interval based call transfer – Transfers the call to another extension on the client account based on the time interval when the call is received.

  If in {time interval} transfer to {extension}, else transfer to {extension} – Use the dropdown lists to select the time interval and the destination extensions.

- Time interval based jump – Jumps to another context based on the time interval when the call is received.

  If in {time interval} jump to {context} at option {option}, else jump to {context} at option {option} – Use the dropdown lists to select the time interval, the destination contexts and options.

- Transfer to extension – Transfers the call to another extension on the client account.

  Transfer to extension {extension} – Use the dropdown list to select the destination extensions.

  > **Note**
  >
  > The extensions that are disabled are displayed in grey colour in the dropdown list.

  Play sound {folder} {sound} before transferring – Use this option if you want to play a sound file before transferring the call to another extension.

- Transfer to extension from variable {variable} – Use the textbox to fill in the name of the variable that contains the number provided by the caller.

  Transfer to extension from variable – Transfers the call to another extension on the client account. The number of the extension is provided by the caller through the phone keypad.

- Text to speech – Plays a custom text to the caller.

  Text to speech {text} with voice {voice} – Use the textbox to fill in the text you want to play for the caller; you can also use SSML tags to control how the text is read (for more information, see Using the Text to Speech Feature). Use the dropdown list to choose the voice that will pronounce the text.

  > **Note**
  >
  > This action is available only if these two conditions are fulfilled:
  >
  > - The IVR has the limit "Maximum concurrent text to speech" set to a value greater than 0.
  > - The option "Text to speech" is enabled on the server. For more information, check with the server administrator.

◦ Wait for X seconds – Used to introduce a delay between two actions.

  Wait for {x} seconds – Use the textbox to specify the delay. The values allowed range from 0 to 600 seconds.

- Actions – In this section you can view the actions that have been added for the option change the order in which these actions are executed.

5. Choose the action you want to add from the Add action section. Define its details and click OK to add it to the context. Click Cancel to reset the controls on the page.
6. Repeat Step 5 until the desired sequence of actions is complete.

Generate the IVR

After you have created your contexts, options and actions it is time to put it all together and physically generate the IVR. To do this, click the Generate IVR link that can be found in the upper right corner of the IVR Management page.

> **Note**
>
> The Generate IVR link becomes visible each time you modify the IVR version that you generated previously.

Edit an IVR Context

1. In the Contexts table click the name of the context you wish to modify.
2. In the new page that opens, use the available controls to:
   - Change the name of the context – To do this, use the Name textbox and click the OK button to save your changes. Click Cancel to go back to the previous page.
   - Set the context as an entry or a regular context – To do this, use the This is the entry context textbox and click the OK button to save your changes. Click Cancel to go back to the previous page.
   - Edit the options and actions associated with the context – To do this, see section Edit options and actions.

Edit options and actions

1. In the Context options table click the name of the option you want to edit.
2. A new page opens allowing you to edit the sequence of actions. You can perform the following changes:

- Change the order of the actions – To do this, use the available up and down arrows available in the P column. Then click the Apply changes link to save your changes.

> **Note**
>
> The number of unsaved changes performed on the list is displayed on the left side of the table: `{x} pending changes`. The counter is increased for each rule with a different position than the initial one.

- Change the details of an action – To do this, click the name of the chosen action. In the new page that opens use the available controls to edit the settings of the action as explained in the Add options and actions section, Step 4.

> **Note**
>
> To replace an action simply use the **Action** dropdown list to select a new one.

Delete actions

To delete one of the actions belonging to an option, in the Context options table click the name of the option. In the new page that opens, click the checkbox corresponding to the desired action. Then click the Remove selected link.

To delete all the actions associated with an option, in the Context options table click the checkbox corresponding to the desired option. Then click the Empty selected link.

Generate the IVR

After you have edited your contexts, options and actions you must re-generate the IVR. To do this, click the Generate IVR link that can be found in the upper right corner of the IVR Management page.

> **Note**
>
> The Generate IVR link is visible only if you have modified the IVR that you generated previously.

Delete Context

To delete one or more contexts from an IVR, in the Contexts table select the checkbox corresponding to the desired contexts. Then click the Remove selected link. 4PSA VoipNow will ask you to confirm the removal.

View the IVR Schema

4PSA VoipNow can generate a graphical representation of the IVR context and the links between them (i.e. actions of type 'Jump to context' and 'Timeinterval based jump').

View the IVR Structural Report

When trying to generate an IVR, 4PSA VoipNow checks for structural inconsistencies and errors. In case it finds any, it displays warning or error messages in the IVR Management page.

In case structural inconsistencies are found, 4PSA VoipNow allows you to view and correct their causes. To view the causes you have two options:

- In the warning message that appears, click the available link.
- In IVR Management page, click the button.

In the report page, 4PSA VoipNow display the contexts, options and actions where the inconsistencies are located. It also provides links to easily access the pages where you can correct these inconsistencies.

Types of Errors

4PSA VoipNow check for the following structural errors:

- The IVR does not have an entry context.
- The IVR's entry context does not have actions defined for the start option.

> **Note**
>
> The IVR cannot be generated when structural errors are found.

4PSA VoipNow checks for the following structural inconsistencies:

- The IVR uses actions of type 'Timeinterval based call transfer' and 'Transfer to extension' that use destination extensions that no longer exist in the system.
- The IVR uses actions of type 'Timeinterval based jump' and 'Jump to context' that use destination contexts that no longer exist.
- The IVR uses actions that play sounds that no longer exist in the system.

If the structure of the IVR is correct, the page displays the following message: ' This IVR has no structural errors'.

Test the IVR

4PSA VoipNow gives you the possibility to verify a newly created IVR or an older IVR you which you modified, before making it public.

When you use the test function after modifying an IVR, 4PSA VoipNow will create a duplicate IVR which you can verify over the phone. If you accept the modifications, and generate the IVR, 4PSA VoipNow will overwrite the duplicate IVR on the old one. This way your changes will be saved. In case you find any inconsistencies, and you want to make further changes or corrections, you must not generate the modified IVR.

To test an IVR you have to follow these steps:

1. Click the chosen IVR extension name link in the Extension Management page.
2. In the new page that opens, click the IVR Setup icon available in the Tools area.
3. Make the desired modifications (e.g. creating new contexts etc.)
4. Click the Test IVR link placed top right.

   A message with instructions will be displayed on the top of the page:

   `Pick up the phone and dial {extno} from your phone in order to test this IVR.`

   `When you want to go live with this IVR, press the 'Generate IVR' button.`

   `If you want to modify the IVR, make changes to the IVR design in web interface and press on the 'Test IVR' button again.`

Manage Callback Authorized Caller-IDs

4PSA VoipNow allows you to authorize the users that should benefit from the callback function.

The extension of type callback allows system users to place call from a phone connected to the public network and then route them through the 4PSA VoipNow server. It is recommended to restrict this functionality, to avoid abuse. To do this, you must create a list of authorized Caller-IDs. Users will be allowed to route phone calls through the server only if they call from an authorized phone number.

View Callback Authorized Caller-IDs

4PSA VoipNow allows you to view the authorized users. To access this information, follow these steps:

1. Click the name of the callback extension in the Extension Management page.
2. In the new page that opens, click the Authorized Caller-IDs icon available in the Tools area.

   The table with authorized IDs contains the following columns:

- S – The status of the authorized Caller-ID displayed using an icon: Enabled or Disabled. Click this icon to change the status of the reseller.
- C – Click this icon if you want to view a report about the costs of the calls that have originated from this Caller-IDs.
- Callback number – Displays the phone number of the authorized user.
- PIN – Displays by means of Yes/No whether the user will be asked to introduce his/her PIN code previous to using the callback function.
- Total credit – Displays the user's total initial credit.
- Available credit – Displays the credit left for using the callback function.
- Created – Displays the date when the phone number was introduced to the authorized Caller-ID's list.
- B – Click this icon if you want to access the Caller-ID Credit Management page.

Add an Authorized Caller-ID

To add an authorized Caller-ID to the list, follow these steps:

1. Click the name of the callback extension in the Extension Management page.
2. Click the Authorized Caller-IDs icon available in the Tools area.
3. In the new page that opens, click the Add authorized Caller-IDs icon.

In the new page you can add Caller-IDs manually or upload a file containing multiple Caller-IDs. Fill in the required fields:

- Upload authorized Caller-IDs from file
  - Upload Caller-IDs from file – Enable this checkbox in case you want to upload a file containing the data about multiple Caller-IDs.
  - Caller-IDs file – When the Upload Caller-IDs from file option is enabled, you can use the Browse button to locate the file containing the Caller-IDs that you want to upload.

    > **Note**
    >
    > The uploaded Caller-ID will be displayed in the following pattern: `callerid, pin, orderno, credit`. The `credit` parameter can take numeric values or the `u, unlimited` value.

  - Field separator – Use this textbox to specify the character that separates the values in the file. The default character is ',' (comma)..
- Add authorized Caller-IDs
  - Accept calls from Caller-ID – Use this field to insert the number of the extension. 4PSA VoipNow will allow callback to this number.
  - PIN number – Use this field to insert the PIN code associated to the extension. 4PSA VoipNow will request the user to provide the PIN before allowing the use of the callback extension.
  - Order number – Use this field to insert the identification number of the request for allocating this credit.
  - Add an initial credit of – Use this field to introduce the amount of money offered to the user when setting up his/her Caller-ID.

- Use the ⊞ ⊟ buttons to add/remove several new authorized Caller-ID's at the same time.

- Click OK to add the new authorized Caller-ID to the system. Click Cancel to go back to the previous page without adding the Caller-ID.

Manage Credit Associated to the Authorized Caller-ID

4PSA VoipNow allows you to add money to the extension whose Caller-ID is included in the authorized ID's list. You can add credit or view the credit status of the authorized Caller-ID.

View Credit Associated to the Authorized Caller-ID

To view the credit of an authorized Caller-ID, follow these steps:

1. Click the name of the callback extension in the Extension Management page.
2. In the page that opens, click the Authorized Caller-IDs icon available in the Tools area.
3. In the displayed table, click the Credit Management icon corresponding to the desired Caller-ID.

In the next page, a new table with credit information will be displayed in the Recharge History section:

- Order number – Displays the identification number for the credit allocation.
- Credit added – Displays the amount of money added to this Caller-ID.
- Credit left – Displays the amount of money available for conversations.
- Date added – Displays the date when the credit was added to the Caller-ID.

Add Credit to the Authorized Caller-ID

To add credit to an authorized Caller-ID, follow these steps:

1. Click the name of the callback extension in the Extension Management page.
2. In the page that opens, click the Authorized Caller-IDs icon available in the Tools area.

3. In the displayed table, click the Credit Management icon corresponding to the desired Caller-ID.

In the opening page use the Add Credit section. Fill in the required fields:

- Add credit – Use this field to introduce the amount of money you want to offer the Caller-ID user.
- Order number – Use this field to insert the identification number of the request for allocating this credit.
- Click OK to add the new credit to the system. Click Cancel to go back to the previous page without adding the credit.

The newly added credit will be displayed in the table below.

Delete an Authorized Caller-ID

You can access this page from the Extension Management page by clicking the chosen callback extension name and the Authorized Caller-IDs icon available in the next page.

To delete an existing Caller-ID from the system, follow these steps:

- Select the corresponding checkbox from the displayed table and click the Remove selected link.
- You will be asked to confirm the removal. Enable the Confirm the removal checkbox and click the OK button to delete the authorized Caller-ID, or Cancel to return to previous page without any change.

Manage Calling Card Codes

4PSA VoipNow allows you to authorize the users that should benefit from the calling card function.

This type of extension allows the implementation of a calling card system on the 4PSA VoipNow server.

View Calling Card Codes

4PSA VoipNow allows you to view the calling card codes in the system. To access this information, follow these steps:

1. Click the name of the Calling Card extension in the Extension Management page.
2. In the new page that opens, click the Card Codes icon available in the Tools area.

   The table with card codes contains the following columns:

- C – Click this icon if you want to view a report about the costs of the calls that have been placed using this card code.
- Card code – Displays the unique code of the calling card.
- PIN – Displays by means of Yes/No whether the user will be asked to introduce his/her PIN code previous to using the Calling Card function.
- Total credit – Displays the card user's initial credit.
- Available credit – Displays the credit left for using the Calling Card function.
- Created – Displays the date when the calling card code was added to the system.
- C – Click this icon if you want to access the Card Code Credit Management page and recharge the credit of the calling card.

Add a Card Code

To add a Card Code to the list, follow these steps:

1. Click the name of the Calling Card extension in the Extension Management page.
2. Click the Card codes icon available in the Tools area.
3. In the new page that opens, click the Add Card Code icon.

In the new page you can add card codes manually or upload a file containing multiple card codes. Fill in the required fields:

- Upload Card Codes from file
  - Upload Card Codes from file – Enable this checkbox in case you want to upload a file containing the data about multiple card codes.

- Codes file – When the Upload Card Codes from file option is enabled, you can use the Browse button to locate the file containing the codes that you want to upload.

> **Note**
>
> The uploaded Code will be displayed in the following pattern: `card code, PIN, order number, initial credit`. The `credit` parameter can take numeric values or the `u, unlimited` value.

- Field separator -Use this textbox to specify the character that separates the values in the file. The default character is ',' (comma).

- Add Card Code
  - Code – Use this field to insert the number of the extension.
  - PIN number – Use this field to insert the PIN code associated to the extension. 4PSA VoipNow will request the user to provide the PIN.
  - Order number – Use this field to insert the identification number of the request for allocating this credit..
  - Add an initial credit of – Use this field to introduce an extra credit offered for the extension to use with the Calling Card function.
  - Use the buttons to add/remove several new codes at the same time.
- Click OK to add the new code to the system. Click Cancel to go back to the previous page without adding the code.

Manage Card Codes Credit

4PSA VoipNow allows you to add money to the extensions operating with Card Codes. You can add credit or view the credit status of the card user.

View Card Codes Credit

To view a card code credit, follow these steps:

1. Click the name of the calling card extension in the Extension Management page.
2. In the page that opens, click the Card Codes icon available in the Tools area.
3. In the displayed table, click the Credit Management icon corresponding to the desired Card Code.

In the next page, a new table with credit information will be displayed in the Recharge History section:

- Order number – Displays the identification number for the credit allocation.
- Credit added – Displays the amount of money added to this Card Code.
- Credit left – Displays the amount of money available for conversations.
- Date added – Displays the date when the credit was added to the Card Code.

Add Card Codes Credit

To add credit to an card user, follow these steps:

1. Click the name of the calling card extension in the Extension Management page.
2. In the page that opens, click the Card Codes icon available in the Tools area.
3. In the displayed table, click the Credit Management icon corresponding to the desired Card Code.

In the opening page use the Add Credit section. Fill in the required fields:

- Add credit – Use this field to introduce the amount of money you want to offer the card user.
- Order number – Use this field to insert the identification number of the request for allocating this credit.
- Click OK to add the new card credit to the system. Click Cancel to go back to the previous page without adding the credit.

The newly added credit will be displayed in the table below.

Delete a Card Code

You can access this page from the Extension Management page by clicking the chosen Calling Card extension name and the Card Codes icon available in the next page.

To delete an existing calling card code from the system, follow these steps:

- Select the corresponding checkbox from the displayed table and click the Remove selected link.
- You will be asked to confirm the removal. Enable the `Confirm the removal` checkbox and click the OK button to delete the Card Code, or `Cancel` to return to previous page without any change.

View Extension's Billing Plan

4PSA VoipNow allows you to view detailed information about the billing plan of an extension account. To access this information, follow these steps:

1. Click the chosen extension link in the Extension Management page.
2. In the new page that opens, click the  Extension billing icon to view details about the prices charged for calls made by the extension.

Based on the billing plan type (prepaid or postpaid) and its settings, you can view one or more of the following sections:

- Billing plan description
  - Billing plan name – The name of the billing plan for the extension account
  - Billing plan type – The type of the billing plan for the extension account: prepaid or postpaid.
  - Allow incoming calls - Yes – 4PSA VoipNow displays this information only if the extension can receive calls from extensions that belong to the system as well as from extensions outside the system.
  - Allow outgoing external calls - Yes – 4PSA VoipNow displays this information only if the extensions on your account can make calls to destinations outside the system.
  - Allow outgoing local calls - Yes – 4PSA VoipNow displays this information only if the extensions on your account can make calls to other extensions on the same client account.
  - Allow outgoing extended local calls - Yes – 4PSA VoipNow displays this information only if the extensions on your account can make calls to other extensions in the system (not on the same client account).
  - Monthly charge – The monthly fee paid by the extension account owner

> **Note**
>
> This information is available only for postpaid billing plans.

- Remaining incoming calls credit – The amount currently available for incoming calls.

  > **Note**
  >
  > This information is available only for prepaid billing plans.

- Remaining outgoing calls credit – The amount currently available for outgoing calls.

  > **Note**
  >
  > This information is available only for prepaid billing plans.

- Initial incoming credit – The credit that was granted for incoming calls when the extension account was created.

  > **Note**
  >
  > This information is available only for prepaid billing plans.

- Initial outgoing credit – The credit that was granted for outgoing calls when the extension account was created.

  > **Note**
  >
  > This information is available only for prepaid billing plans.

- Number of recharges

  > **Note**
  >
  > This information is available only for prepaid billing plans.

> **Note**
>
> 4PSA VoipNow displays only sections that are enabled in the billing plan applied on the extension account.

- Available external outgoing minutes - Number of outgoing minutes available, per time interval. The number of outgoing minutes is displayed for each time interval included in the billing plan in the format:

  {m} available external minutes in time interval {T}

  The number of remaining minutes in current month is also displayed in format:

  {m} remaining in {month}

  > **Note**
  >
  > This information is available only for postpaid billing plans.
  >
  > 4PSA VoipNow displays this section only if the extension can make calls to destinations outside the system.

- Outgoing calls charges – These are the charges applied to conversations
  - Local calls are charged {money unit} / second – The fee charged for calls between extensions on the same client account.

    > **Note**
    >
    > 4PSA VoipNow displays this information only if the extensions can call locally.

  If the charges for external calls are computed using a fixed price method, 4PSA VoipNow displays the costs for each time interval in the following format:

  - Calls made in time interval {T} are charged with {money unit} / second – The price charged for external calls made in time interval {T}.

  4PSA VoipNow displays the costs for the calls outside the time intervals specified above:

  - Calls made outside these time intervals are charged {money unit} / second – The price charged for external calls made in other time intervals.

- External incoming calls charges – These charges apply to calls received from outside the system.

  > **Note**
  >
  > 4PSA VoipNow displays this information only if the extensions are allowed to receive external calls.

Manage Extension's Billing Limits

4PSA VoipNow 1.5 allows you to set billing limits when the extension operates under a postpaid billing plan. Billing limits are a form of extra credit, a special offer made to a particular extension.

> **Note**
>
> If the extension operates under a prepaid plan, you can only offer *billing credits*.

View Extension's Billing Limits History

4PSA VoipNow allows you to view detailed information about a extension's billing limits. To access this information, follow these steps:

1. Click the chosen client name link in the Extension Management page.
2. In the new page that opens, click the Billing limits icon available in the Tools area.

   The table with billing limits history contains the following columns:

- Incoming money limit – Displays the supplementary credit for external incoming calls.
- Outgoing money limit – Displays the supplementary credit for external outgoing calls.
- Overusage minutes – Displays the supplementary overusage minutes limit.
- Every month – Displays whether the limits are offered monthly or only for the current month.
- Order number – Displays the number of the request for allocating the new billing limits.
- Date added – Displays the date when the billing limits were enforced.

Add Limits to an Extension Account

In this section of the page you can insert extra time and money limits to the extension, by inserting digits in the following fields:

- **Incoming money limit** – Enter the amount of money which you want add to the limit for external outgoing calls that was initially set in this extension's billing plan.
- **Outgoing money limit** – Enter the amount of money which you want to add to the limit for external incoming calls that was initially set in this extension's billing plan.
- **Overusage minutes** – Enter the amount of minutes you want add to the external outgoing overusage minutes from this extension's billing plan.
- **Order number** – Insert the identification number of the request for allocating these billing limits.
- **These limits should be added every month** - Enable this checkbox if you want to add these limits automatically every month.

Click OK to save your settings, or Cancel to go back to the previous page.

Delete Extension Billing Limits

You can access this page from the Extension Management page by clicking the chosen extension name link and the Billing limits icon available in the next page.

To delete a billing limit from the displayed table, follow these steps:

- To delete a monthly billing limit, select its corresponding checkbox from the billing limits table and click the Remove selected link. You will be asked to confirm the removal. Enable the `Confirm the removal` checkbox and click the OK button to delete the selected billing limit, or Cancel to return to previous page without any change.
- You cannot delete a billing limit that is set for one month only. However, if you have made a mistake and you want to modify the limit you added, insert a new billing limit with a similar negative value (with a minus in front). Then click OK button to save the new setting, or Cancel to go back without making any changes.

> **Note**
>
> You can use this procedure to decrease the billing limit set for one month, by subtracting a smaller value, not an equal one.

Manage Extension's Billing Credits

4PSA VoipNow 1.5 allows you to set billing credits when the extension operates under a prepaid billing plan. You would access this page when the extension needs to recharge its account.

> **Note**
>
> If the extension operates under a postpaid plan, you can only offer *billing limits*.

View Extension's Billing Credits History

4PSA VoipNow allows you to view detailed information about the history of recharges for the extension's billing credit. To access this information, follow these steps:

1. Click the chosen extension name link in the Extension Management page.
2. In the new page that opens, click the Billing credits icon available in the Tools area.

   The table with billing credits history contains the following columns:

- Incoming calls credit – Displays the supplementary credit for incoming calls.
- Outgoing calls credit – Displays the supplementary credit for outgoing calls.
- Order number – Displays the number of the request for allocating the new billing credits.
- Date added – Displays the date when the billing credits were enforced.

Add Credits to an Extension Account

In this section of the page you can insert extra time and money limits to the extension, by inserting digits in the following fields:

- Outgoing calls credit – Enter the amount of money with which you want to recharge this extension's credit used for outgoing external calls.
- Incoming calls credit – Enter the amount of money with which you want to recharge this extension's credit used for incoming external calls.

- **Order number** – Insert the identification number of the request for allocating the billing credits.

Click **OK** to save your settings, or **Cancel** to go back to the previous page.

Decrease Extension Billing Credits

You can access this page from the **Extension Management** page by clicking the chosen extension name link and the **Billing Credits** icon available in the next page.

You cannot delete a billing credit. However, if you have made a mistake and you want to modify the credit you added, insert a new billing credit with a smaller negative value (with a minus in front). Then click **OK** button to save the new setting, or **Cancel** to go back without making any changes.

View Extension's Call Costs

4PSA VoipNow offers an easy way to keep track of each extension's calls and their costs.

In **Call Costs** page, you can view a detailed list of calls for the current and previous months. Multiple operations can be performed:

- Search for specific calls.
- Export the call list to a Microsoft Excel file.
- Export the call list to a CSV file.

To view an extension's call costs, click the chosen extension link in the **Extension Management** page. Next, click the **Call costs** icon.

4PSA VoipNow displays a table containing the calls registered in the current month. To view the calls from a previous month, use the dropdown list available at the top of the table.

> **Note**
>
> The entries in the dropdown list also display the total cost of the costs registered for each month.

The table includes the following details about each call:

- F – The flow of the call displayed using an icon: incoming call, outgoing call.
- T – The type of the call displayed using an icon: local call, extended local call, external call.
- A – The call application type displayed using an icon: Dial, Queue, IVR, Voicemail, Conference, Park, Unpark, Callback, Calling Card.
- From – The Caller-ID and the extension (if the call is initiated from inside the system) of the person who made the call.
- To – The Caller-ID and the extension (if the call is to an inside extension) of the person who answered the call.
- Call started – The date and time when the call was started
- Call duration – The duration of the call
- CallID – Use this textbox to fill in the unique number that Asterisk generated to identify the call.
- Call cost – The cost of the call for the extension owner

Search the Call List

4PSA VoipNow automatically displays only the calls of the current month. If you want to view the call list of previous months or search for specific calls, perform the following steps:

1. Use the following options for an advanced search:
   - From number - Use this textbox to fill in the phone number of the person who made the call.
   - To number - Use this textbox to fill in the phone number of the person who answered the call.
   - CallID – Use this textbox to fill in the unique number that Asterisk generated to identify the call.
   - Call duration – Use this section to specify the call duration limits by filling in the fields in rule:

     higher than {} seconds and/or lower than {} seconds
   - Call cost – Use this section to specify call cost limits by filling in the fields in rule:

     higher than {} and/or lower than {} seconds

- **Call ended with** – Use the dropdown list to choose a certain ending for the call. Possible values are: answered, no answer, busy, failed, unknown.
- **Start search on/ End search on** - Use these textboxes or click the corresponding calendar icon to specify the period you want to search.
- **Display** - Use these radio buttons to filter the search results:
  - **All** – Select this option to display all the types of calls in the list.
  - **Incoming calls** – Select this option to display only the calls that were received.
  - **Outgoing calls** – Select this option to display only the calls that were placed.
- **Limit search by call context** – Use these radio buttons to filter the search results:
  - **All** – Select this option to display all calls.
  - **Local calls** – Select this option to display only calls made to local numbers (between extensions belonging to the same client).
  - **Extended local calls** – Select this option to display only calls made to extended local numbers (between extensions belonging to different clients).
  - **External calls** – Select this option to display only calls received from outside the system or sent to external destinations.
- **Limit search by application** – Use these checkboxes to filter the search results by the application used by Asterisk to handle the call:
  - **Dial** – Select this option to display calls between two phone terminals.
  - **Queue** – Select this option to display calls targeted at queue extensions.
  - **Conference** – Select this option to display conference calls.
  - **Voicemail** – Select this option to display calls that ended in the voicemail mailbox.
  - **Voicemail Center** – Select this option to display calls to an extension of type voicemail center.
  - **IVR** – Select this option to display calls targeted at IVR extensions.
  - **Park** – Select this option to display calls that were parked.
  - **Unpark** – Select this option to display calls that were picked up form the parking lot.

Callback - Select this option to display calls that were made using an extension of type callback.

Calling Card - Select this option to display calls that were made using an extension of type calling card.

2. Click OK to display only the records that fit your search criteria.
3. Use the dropdown list in the top left side of the call costs list to search for calls made in a specific month. Choose the '--' option to display the entire call costs list.

> **Note**
>
> In the top left corner of the calls table, 4PSA VoipNow displays the total cost of the calls found as a result of the search operation.

Export to an Easy-to-edit Format

- Export to Excel – Click this button to export the call costs report to a Microsoft Excel file.
- Export to CSV – Click this button to export the call costs report to a CSV format file.

You have the possibility to customize the exported call cost report by choosing the columns you want to include in your report. To select the relevant columns that will appear in the exported report, click the Show export button in the upper right corner of the screen. Enable the checkboxes corresponding to the column names you want to export. Disable the checkboxes corresponding to the column names you want to leave out.

This is the list of all possible columns you can export in your customized report:

- Call flow
- Call type
- Application
- To number
- From number
- Call started - The date and time when the call started ringing on the destination phone.

- Call answered - The date and time when the call was answered. If the call was not answered, 4PSA VoipNow records the value: 0000-00-00 00:00:00
- Call duration
- Call disposition - The way the call was terminated: it was either answered, not answered, failed, etc
- Billing plan - The billing plan that generated the call cost.
- Call cost The cost of the call as charged by the system administrator.
- Money unit
- Call ID - The unique ID of the call generated by 4PSA VoipNow.
- Transfer source - If the call was transferred to another extension, this column will list the source extension.
- Transfer destination - If the call was transferred to another extension, this column will list the destination extension.
- Initially called extension - If the call was picked up from another extension, this column will display the extension that was originally called.
- Callback caller-ID - If the caller used a callback extension to route its call to a remote destination, this column displays the authorized Caller-ID (the number from which the user dialed the system).
- Calling card code - If the caller used a calling card to call a destination number, this column displays the code introduced to authenticate and charge the call.

Manage Extension's Sounds

View Extension's Sound List

There are two types of sounds: music on hold and announcements sounds.

Music on hold sound files are played when a caller is on hold waiting for someone to answer his/her call. These sound files are not language specific because they are usually melodies. Music on hold files can only be uploaded, not recorded over the phone.

An announcement sound is played when the user is notified on an event or when information is requested from the user. These sounds have different files for different languages, so that a user can listen to the sound version according to his/her language preferences. If the files in the requested language do not exist, the default files will be played. This type of sound can be either uploaded or recorded over the phone.

To access the extension's sounds page, click the chosen extension link in the Extension Management page. A new page opens containing button links to all specific extension operations. Next, click the Sounds icon available in the Tools area.

> **Note**
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

In the Sound Management page, you can view a list of the sounds available in the extension account. You can also perform multiple operations:

- Add and delete sounds from the extension account.
- Search for specific sounds in the extension account.
- Organize sound files by using sound languages and sound folders.

4PSA VoipNow displays the following information about each sound:

- S – The status of the sound, displayed using an icon: Enabled and Disabled. Click the icon to change the sound's status.
- M – This field describes the purpose of the file by using an icon:
  - specifies an Announcement sound
  - specifies a Music on hold sound
- Name – The name of the sound. Click this link to edit the sound.
- Folder – The folder where the sound is located in the system.
- Languages – The number of languages for which this sound is defined.

> **Note**
>
> If the sound is used as Music on hold, the field displays '-'.

- Modified – The date when the sound was last modified

Search the Sound List

When the sound list is too long and you are searching for specific sound, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the sounds whose names contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of sounds.

Another way to simplify the listing is to sort the sound list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Add a New Sound

To access this page, click the chosen extension link in the Extension Management page. A new page opens containing button links to all specific extension operations. Next, click the Sounds icon available in the Tools area.

> **Note**
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

A user can add a new sound associated to the chosen extension account only if the extension has sound languages available. On extension creation, the default sound language is added to the extension account. When there are no sound languages, click the Sound languages icon and follow the instructions in the Add a New Language section to add new languages.

To add a new sound to the extension account, follow these steps:

1. Click the Add sound icon available in the Tools area.
2. A new page opens allowing you to enter information on the new sound:

- Sound form
  - Name – The descriptive name for the sound.
  - This is music on hold – Use this checkbox to specify the purpose of the sound. When this option is selected, the sound can be played to a caller that is on hold. Otherwise, the sound is used for announcement purposes only.
  - Folder – Use this dropdown list to select the folder where the sound will be stored.
- Record over the phone
  - I want to record sound over the phone – When this option is enabled, 4PSA VoipNow gives you the possibility to record the sound file over the phone rather than uploading it.
- Upload sound files
  - Filename – Click the Browse button to locate the sound file on your computer and upload it.

> **Note**
>
> 4PSA VoipNow accepts the following extensions for sound files: `.mp3`, `.wav`, `.gsm` and `.raw`.

If you are creating an announcement sound (i.e. the checkbox This is music on hold is not enabled), the following options are visible:

- Language – Use this dropdown list to specify the language of the sound file uploaded in the system.
- Default sound file – When this option is enabled, this file is set as default for the sound. The default file is played for the callers with a phone language that is unavailable for the sound.

  For example, let's assume you have created a sound that announces callers that the extension user is on holiday. You have added versions of the announcement in English, French, and Dutch and set the English file as default. The English sound version will be played to any caller that has other phone language set.

> **Note**
>
> Each sound object must have one default sound file associated. When uploading several sound files at the same time, make sure you select only one default file. Otherwise, 4PSA VoipNow displays an error message.

3. You can use the buttons to remove/add versions of the sound in different languages.

   - removes the Upload sound section
   - adds another Upload sound files section

4. Click OK to add the new sound. Click Cancel to go back to the previous page without adding the sound.

Edit Sound Options

To access this page and edit the information on an existing sound, click the chosen extension in the Extension Management page. Next, click the Sounds icon available in the Tools area.

> **Note**
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

In the new opened page you can modify the properties of a sound. You can add and delete files containing versions of the sound for different languages.

To edit the properties of a sound from the extension account, follow these steps:

1. Click the name link of the sound you want to modify.
2. A new page opens allowing you to change the details of the sound. The content of this page depends on the purpose of the sound: announcement or music on hold.

If the sound is an announcement sound, the information is grouped in the following sections:

- Sound form
- Upload sound files – Use this section to upload files containing versions of the sound in different languages.

> **Note**
>
> When you upload a sound file associated with a language that already exists, 4PSA VoipNow replaces the old file with the new version. Before this operation is performed, 4PSA VoipNow asks you to confirm the replacement.

- Use the buttons to remove/add versions of the sound in different languages.
  - removes the corresponding Upload sound files section
  - adds another Upload sound files section

To manage the existing sound files associated with an announcement sound, follow the steps:

1. Click the name link of the sound you want to modify.
2. A new page opens allowing you to view a detailed list of the existing files. In the Existing sounds section, 4PSA VoipNow displays the following information on each file:
   - Filename – The name of the file. Click this link to download the file on your computer.
   - Sound file size – The size of the file in Kb
   - Folder – The folder where the file is located
   - Language – The language associated with the sound file

   > **Note**
   >
   > The default sound file of the sound object is displayed in **bold** format.

3. Click OK to save your changes. Click Cancel to go back to the previous page without changing the sound.

Search the File List

When the file list is too long and you are searching for specific sound files, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the sound files whose names contain the text.

- Show all – Click this button or the `Show all` label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the `Number of entries per page` link. The number of entries per page is shown in the left side of the table along with the total number of sound files in the system.

Another way to simplify the listing is to sort the sound file list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Remove Files

Choose the files you want to delete by selecting their corresponding checkboxes. Then click the Remove selected link. You will be asked to confirm the removal.

> **Note**
>
> Default sound files cannot be deleted. You must replace a default sound file.

Manage Extension's Sound Folders

In the Sound Folder Management page, you can view a list of the sound folders available in the extension's account. Multiple operations can be performed:

- Add a new sound folder
- Delete sound folders and their content
- Search for specific folders

To access a sound folder page, click the chosen extension link in the Extension Management page. Next, click the Sounds icon available in the Tools area and the Folders icon.

> **Note**
>
> The **Sounds** section is available only if the `Sound Management` permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

4PSA VoipNow displays the following information on each folder:

- Folder name – The name of the sound folder
- Sound files – The number of sounds stored in the folder. Click this link to open a new page listing these sounds.
- Created – The date when the folder was added to the system

Search the Folder List

When the time folder list is too long and you are searching for specific sound folders, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the folders whose names contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of sound folders in the system.

Another way to simplify the listing is to sort the sound folder list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Add a New Sound Folder

Each time you add new sound files in the system you must choose the folder name where you want them to be stored. If you want to store a sound in a specific folder, other than the ones already existent, you can add a new sound folder before adding sound files.

Follow the steps described below to add a new sound folder for a specific extension:

1. Click the chosen extension link in the Extension Management page.
2. Next, click the Sounds icon in Tools area and the Folder icon.

> **Note**
>
> The **Sounds** section is available only if the `Sound Management` permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

3. In the Sound Folder Management page, click the Add folder icon.
4. A new page opens allowing you to enter the name of the new folder. Use the available textbox to name the new folder.
5. Use the buttons to add several folders at the same time.
   - adds a new folder input textbox
   - removes the corresponding textbox
6. Click OK to add the new sound folder(s). Click Cancel to go back to the previous page without adding the folder(s).

Delete Sound Folders

To remove sound folders from an extension's account along with the sound files inside, click the chosen extension link in the Extension Management page. Next, click the Sounds icon available in the Tools area and the Folder icon.

> **Note**
>
> The **Sounds** section is available only if the `Sound Management` permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

A new page opens displaying all the sound folders available on the extension account. To delete sound folders follow these steps:

1. Choose the folders you want to delete by selecting their corresponding checkboxes.
2. Click the Remove selected link. A new page opens displaying the list of folders and the sounds located in the folders that will be deleted.

> **Note**
>
> When you delete a folder, you also delete all the sounds located in the folder.

3. Review the list. If you want to proceed with the removal, select the Confirm the removal checkbox and click OK. Otherwise click Cancel to return to the previous page without any removal.

> **Note**
>
> If the sounds inside the folder are currently used, these sounds cannot be deleted. The folder that contains them cannot be deleted either.

Manage Extension's Sound Languages

View the Language List

A sound file can be recorded in several languages so that the extension can listen to the specified announcement in his chosen language if available in the system. When the extension's language does not exist, the announcement will be played in the default sound language.

In the Sound Languages Management page, you can view a list of the languages available on the extension's account. Multiple operations can be performed:

- View a detailed list of the system languages
- Add a new sound language
- Search for specific languages
- View the sounds that have files in different languages
- Delete sound languages from the system

To access Sound Language Management page for a specific extension, click the chosen extension link in the Extension Management page. Next, click the Sounds icon available in the Tools area.

> **Note**
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

In the new page that opens, click the Sound languages icon.

4PSA VoipNow displays the following information on each sound language:

- Language name – The name of the language
- Sound files – The number of sound files in this language. Click this link to view the list of sound files.
- Created – The date when the language was added to the system

Search the Language List

When the language list is too long and you are searching for specific languages, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the languages whose names contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of sound languages in the system.

Another way to simplify the listing is to sort the sound language list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Add a New Language

To add a new sound language, click the chosen extension in the Extension Management page. Next, click the Sounds icon available in the Tools area.

> **Note**
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

In the new page that opens, click the Sound languages icon and follow these steps:

1. In the Sound Language Management page, click the Add Sound Language icon.
2. A new page opens allowing you to enter the name of the new sound language. Use the dropdown list to add one of the available languages to the extension's account.
3. Use the buttons to add several languages at the same time.
   - adds another dropdown list so you can create another language
   - removes the corresponding dropdown list
4. Click OK to add the new sound language(s). Click Cancel to go back to the previous page without adding the language(s).

Edit Language Details

To change the details of a sound language, click the chosen extension link in the Extension Management page. Next, click the Sounds icon available in the Tools area.

> **Note**
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

In the new page that opens, click the Sound languages icon and follow these steps:

1. Click the name link of the language you want to modify.
2. A new page opens in which you can use the Name dropdown list to choose another name for the language.
3. Click OK to save your changes. Click Cancel to return to the previous page without renaming the language.

Delete Sound Languages

To remove sound languages from a specific extension account, click the chosen extension link in the Extension Management page. Next, click the Sounds icon available in the Tools area.

> **Note**
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

In the new page that opens click the Sound languages icon and follow the steps:

1. Choose the languages you want to delete by selecting their corresponding checkboxes.
2. Click the Remove selected link. A new page opens displaying the list of languages and their associated sounds that will be deleted.
3. Review the list. If you want to proceed with the removal, select the Confirm the removal checkbox and click OK. Otherwise click Cancel to return to the previous page without deleting anything.

Delete Sounds

To delete sounds on a specific extension account, click the chosen extension link in the Extension Management page. Next, click the Sound icon available in the Tools area.

> **Note**
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

Choose the sounds you want to delete from the available list by selecting their corresponding checkboxes. Then click the Remove selected link. You will be asked to confirm the removal.

You cannot remove sounds that are currently used.

You cannot remove a sound object of type music on hold, if the following conditions are met:

- The folder where the sound is located is used.
- The sound is the only one left in the folder.

Manage the CallNow preferences

The CallNow interface allows anyone in the world with Internet access to contact an extension on a VoipNow server. The extension will make a call based on an external number's request. The extension's specific routing, screening and billing rules will apply, as if the call was initiated by the extension.

Prerequisites

The following prerequisites must be met in order to use the CallNow function:

1. The CallNow feature is available only for Phone Terminal extensions.
2. The CallNow feature is available only for extensions with Call API access.

To activate the Call API access, click the chosen extension link in the Extension Management page. Next, click the Phone Terminal Setup icon available in the Tools area. In the new page that opens, select the Call API access checkbox available in the Basic settings area.

Activating the CallNow function

To activate the CallNow function, click the chosen extension link in the Extension Management page. Next, click the CallNow icon available in the Tools area. In the new page that opens, select the Allow people to call me checkbox. This will activate the following options:

- CallNow ID - Enter the caller ID for your extension
- I am available only in time interval - Enter your availability for being contacted through CallNow
- Do not allow people to contact me - Select whether you would like to reject all CallNow requests
- Confirmation required before connecting me to caller - Select whether you would like to confirm before accepting a CallNow request
- Show my name on the public CallNow interface - Make your name public on the CallNow interface
- Ask for the name of the caller - Do not accept anonymous callers

- Use image validation on the public interface - Use a random validation security image
- Message on the public interface - Enter a welcome message for your public interface

When you are done, click OK to validate and apply your changes or Cancel to abort and go back to the previous page.

For more information about CallNow, click here.

Delete Extensions

To remove extensions from a client account, click the chosen client name link in the Client Management page. Next, choose the extensions you want to delete by selecting their corresponding checkboxes.

Then click the Remove selected link. A new page opens displaying the list of extensions.

Review the list. If you want to proceed with the removal, select the Confirm the removal checkbox and click OK. Otherwise click Cancel to return to the previous page without deleting anything.

Chapter 6

Manage Client Templates

View the Client Template List

Client templates are useful when adding new client accounts that have similar permissions and limits. Instead of setting each time the client's permissions and limits, the reseller or the administrator can choose a client template from an available list. If some of the data in the template does not meet your requirements, you can check the `Select client permissions and limits` checkbox and edit them.

To access this page, click the PBX link available in the left panel Navigation area. In the new page that opens, click the  Client templates icon.

In the Client Templates page, you can view a list of all client templates available in the system. Multiple operations can be performed:

- Add a new client template
- Search existing templates
- Edit a client template

- Delete client templates

4PSA VoipNow displays the following information on each template:

- Template name – The name that identifies the template.
- Billing plan – The billing plan associated with this template.
- Clients – The number of clients created using this template. Click this link to view the list of clients currently using this template.

Search the Template List

When the template list is too long and you are searching for specific client templates, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the client templates whose names contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of client templates.

Another way to simplify the listing is to sort the client template list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Add a New Client Template

To access this page, click the PBX link available in the left panel Navigation area. In the new page that opens, click the Client templates icon and follow the steps:

1. In the Client Templates page, click the Add client template icon.

2. A new page opens allowing you to enter information on the new client template. The information is grouped in several sections:

- Client template name
  - Name – Use this textbox to provide a descriptive name for the client template.
- Permissions – Use this section to control the behavior of the client created using this template.
  - Permissions and Limits Management
  - Extension Management
  - Extensions Features Management
  - Billing Plans Management
  - Sound Management
  - Phone Number Management

> **Note**
>
> For explanations on these permissions, read the Edit Permissions and Limits section.

- Limits – Use this section to set up limitations for the client created using this template.
  - Maximum number of phone extensions
  - Maximum number of Queue extensions
  - Maximum number of IVR extensions
  - Maximum number of Voicemail center extensions
  - Maximum number of Conference extensions
  - Maximum number of Callback extensions
  - Maximum number of Callback Caller-IDs
  - Maximum number of Calling Card extensions
  - Maximum number of Calling card Codes
  - Maximum concurrent calls
  - Maximum concurrent text to speech
  - Maximum number of queue members
  - Maximum number of mailboxes

- Maximum size of a Voicemail mailbox
- Maximum disk space for call recording
- Maximum disk space for sound files
- Maximum disk space for fax files
- Account expires in

> **Note**
>
> The Account expires in textbox contains the number of days that the client account will be valid, starting with the creation date.

- Billing plan
  - Billing plan – Use this dropdown list to set the billing plan and the value of the extra credit.

3. Click OK to add the new client template. Click Cancel to go back to the previous page without adding the template.

Edit Client Templates

4PSA VoipNow allows users to edit an existent client template. The clients that are created using the template will have the new features while the ones already created using the same client template will keep the old permissions and limits. To modify the client's limits, permissions, and billing plan you have to edit these features like described in the Edit Client's Details and Edit Permissions and Limits sections.

To edit the details of a client template, follow these steps:

1. In PBX Features page, click the Client templates icon.
2. In the client templates list, click the name link of the template you want to change. A new page opens.
3. In this page, you can view and edit the settings of the selected client template. The data is grouped in several sections:
   - Client template form – Use this section to rename the template.
   - Permissions – Use this section to change the permissions of the client account owners.
   - Limits – Use this section to change the limitations for the template.

- Billing – Use this section to change the billing plan.

4. Click OK to save the changes to the client template. Click Cancel to return to the previous page without saving the changes.

> **Note**
>
> When you modify a template, the accounts that were created using this template will not be affected!

Delete Client Templates

To access this page, click the PBX link available in the left panel Navigation area. In the new page that opens, click the Client templates icon. Choose the client templates you want to delete by selecting their corresponding checkboxes in the client templates list. Then click the Remove selected link. You will be asked to confirm the removal.

> **Note**
>
> When you delete a template, the accounts that were created using this template will not be affected!

Chapter 7

Manage Extension Templates

View the Extension Template List

Extension templates are useful when adding new extension accounts that have similar permissions and limits. Instead of setting each time the extension's permissions and limits, the reseller, client or administrator can choose an extension template from a given selection list. If some of the data in the template does not meet the requirements, you can check the `Select extension permissions and limits` checkbox and edit them.

To access this page, click the PBX link available in the left panel Navigation area. In the new page that opens, click the Extension templates icon.

In the Extension Templates page, you can view a list of all extension templates available in the system. Multiple operations can be performed:

- Add a new extension template
- Search existing templates
- Edit a extension template

- Delete extension templates

4PSA VoipNow displays the following information on each template:

- Template name – The name that identifies the template
- Extension type – The type of extension that this template creates. The possible values of this field are: Phone terminal, Queue, Voicemail Center, Conference.
- Extensions – The number of extensions created using this template. Click this link to view the list of extensions currently using this template.

Search the Templates List

When the templates list is too long and you are searching for specific extension templates, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the extension templates whose names contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of extension templates.

Another way to simplify the listing is to sort the extension template list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Add a New Extension Template

To access this page, click the PBX link available in the left panel Navigation area. In the new page that opens, click the Extension templates icon and follow the steps:

1. In the Extension Templates page, click the Add extension template icon.

2. A new page opens allowing you to enter information on the new extension template. The information is grouped in several sections:

   - Extension template form
     - Name – Use this textbox to provide a descriptive name for the extension template.
   - Permissions – Use this section to control the behavior of the extension created using this template.
     - Extension is multi-aware
     - Sound Management
     - Phone extension SIP management

   > **Note**
   >
   > For explanations on these permissions, read the Edit Permissions and Limits section in Manage Your Clients' Extensions.

   - Limits – Use this section to set up limitations for the extension created using this template.
     - Maximum disk space for sound files
     - Maximum concurrent calls
     - Maximum concurrent text to speech
     - Maximum number of queue members
     - Account expires in

     > **Note**
     >
     > The `Account expires in` textbox contains the number of days that the extension account will be valid, starting with the creation date.

   - Extension type selection – Use this section to choose the type of the extension that will be created using this template.

> **Note**
>
> Based on the type you have selected for the template, one or more additional sections are available allowing you to configure the settings of the extension.

3. Click OK to add the new extension template. Click Cancel to go back to the previous page without adding the template.

Edit Extension Templates

4PSA VoipNow allows users to edit an existent extension template. The extensions that are created using the template will have the new features while the ones already created using the same extension template will keep the old permissions and limits. To modify the extension's limits, permissions, and billing plan you have to edit these features as described in the Edit Extension Features and Edit Permissions and Limits sections.

To edit the details of an extension template, follow these steps:

1. In PBX Features page, click the Extension templates icon.
2. In the extension template list, click the name link of the template you want to change.
3. Next, you can view and edit the settings of the selected extension template. The data is grouped in several sections:
   - Extension template form – Use this section to rename the template.
   - Permissions – Use this section to change the permissions for the extension account owners.
   - Limits – Use this section to change the limitations for the template.
   - Extension type selection – Use this section to change the type of the extension that will be created with this template.

   > **Note**
   >
   > Based on the type you have selected for your template, one or more additional sections become visible allowing you to configure the settings of the extension.

4. Click OK to save the changes to the extension template. Click Cancel to return to the previous page without saving the changes.

> **Note**
>
> When you modify a template, the accounts that were created using this template will not be affected!

Delete Extension Templates

To access this page, click the PBX link available in the left panel Navigation area. In the new page that opens, click the Extension templates icon. Choose the extension templates you want to delete by selecting their corresponding checkboxes in the extension template list. Then click the Remove selected link. You will be asked to confirm the removal.

Note

When you delete a template, the accounts that were created using this template will not be affected!

Chapter 8

View System Reports

The Reports section provides the best overview on the system status. To access this page, click the Reports link available in the left panel Navigation area. Multiple statistics can be gathered:

- Have an overall view of the 4PSA VoipNow system
- View and search the cost of all calls
- View the active calls in the system

Report Overview

In this page, you can view statistics about the number of objects (accounts, sounds, billing plans, active calls etc) currently available in the system.

To access this page, click the Overview tab available in the Reports page. 4PSA VoipNow displays the following information about the system:

- Account overview – This section displays the number of accounts in the system and their status.
  - Total clients – The total number of clients accounts
  - Enabled clients - The number of enabled reseller accounts
  - Suspended clients - The number of disabled reseller accounts
  - Total extensions - Total number of extension accounts
  - Enabled extensions - The number of enabled extensions accounts
  - Suspended extensions - The number of disabled extensions accounts
  - Registered extensions - The number of phone terminal extensions logged in
  - Phone terminals - The total number of phone terminals in the reseller account
  - Queues - The total number of queues in the reseller account
  - IVRs– The total number of IVR extensions in the reseller account
  - Voicemail Centers– The total number of Voicemail Center extensions in the reseller account
  - Conferences– The total number of Conference extensions in the reseller account
  - Callbacks– The total number of Callback extensions in the reseller account
  - Calling Cards– The total number of Calling Card extensions in the reseller account
- Sound files overview
  - Total sounds – The total number of shared and personal sounds in the system. The sounds owned by the logged in user and the sounds owned by users belonging to the logged in user are counted.
  - Shared sounds – The total number of shared sounds. Shared sounds can be used by all 4PSA VoipNow users belonging to the user that added the sound.
  - Personal sounds – These sounds can be used only be the user that created them.
- Music on hold overview
  - Total music on hold files – The number of music on hold files for the logged in user

- Personal music on hold files – The number of system music on hold files, owned by the logged in user
- Personal music on hold folders – The number of music on hold folders, owned by the logged in user

- Billing plans overview
  - Reseller level billing plans – The number of billing plans you have created
  - Client level billing plans – The number of billing plans created by clients
- System usage overview
  - Call cost for {month}, {year} – The total cost of the calls made by the extensions in the reseller account
  - Outgoing time spent on {month}, {year} – The total time spent in outgoing calls in current month
  - Incoming time spent on {month}, {year} - The total time spent in incoming calls in current month
  - Maximum outgoing time spent – The maximum time spent in outgoing calls by the extensions belonging to the logged in user and the month when this happened
  - Maximum incoming time spent – The maximum time spent in incoming calls by extensions belonging to the logged in user and the month when this happened
  - Minimum outgoing time spent – The minimum time spent in outgoing calls by extensions belonging to the logged in user and the month when this happened
  - Minimum incoming time spent – The minimum time spent in incoming calls by extensions belonging to the logged in user and the month when this happened
  - Public phone numbers cost – The sum of monthly costs associated with all the public phone numbers in your account.
- Disk space overview
  - Disk space for sounds – The disk space used by sound and music on hold files
  - Total disk space - The total disk space used by sound files, music on hold files, voicemail messages and conversation recordings.

Call Cost Report

4PSA VoipNow offers an easy way to keep track of the calls made by all the extensions in the system.

In the Call Costs page, you can view a monthly report of all calls registered. You can also:

- Search for specific calls.
- Export the call list to a file in one of the available formats: Microsoft Excel or CSV.

To access this page, click the Call costs tab available in the Reports page.

4PSA VoipNow displays a table containing the calls registered in the current month. To view the calls from a previous month, use the dropdown list available at the top of the table.

Note

The entries in the dropdown list also display the total cost of the costs registered for each month.

The table includes the following details about each call:

- F – The flow of the call displayed using an icon: incoming call, outgoing call.
- T – The type of the call, displayed using one of the icons: external call, local call, extended local call
- A – The application used by the call, displayed using an icon: Dial, Voicemail, IVR, Conference, Park, Unpark Callback, Calling Card.
- From – The number of the extension that initiated the call
- To – The number of the extension that answered the call
- Call cost – The cost of the call
- Call started – The date and time when the call was started
- Call duration – The duration of the call
- CallID – The unique number that Asterisk generated to identify the call.
- Client – The name of the client who owns the extension
- Call cost – The cost of the call for the logged in user
- Profit – The profit recorded by the logged in user on this call

> **Caution**
>
> It is highly advisable to hunt for the call costs that have a negative profit!

Search the Call List

To search the call database, follow these steps:

1. 4PSA VoipNow automatically displays only the calls in the current month. If you want to view the call list for previous months, use the following options:

   - From number - Use this textbox to fill in the number of the person who made the call.
   - To number - Use this textbox to fill in the number of the person who answered the call.
   - Account name – Use this textbox to fill in the account name (on reseller, client or extension levels) you are searching for.
   - Billing plan - Use this textbox to fill in the billing plan name that generated the call cost you are searching for.
   - CallID – Use this textbox to fill in the unique number that Asterisk generated to identify the call.
   - Call duration – Use this section to specify the call duration limits by filling in the fields in rule:

     higher than {} seconds and/or lower than {} seconds
   - Call cost – Use this section to specify the call cost limits by filling in the fields in rule:

     higher than {} and/or lower than {} seconds
   - Profit – Use this section to specify the profit limits by filling in the fields in rule:

     higher than {} and/or lower than {} seconds
   - Call ended with – Use the dropdown list to filter calls that ended with: Answered, No answer, Busy, Failed, Unknown.
   - Start search on/ End search on - Use these textboxes or click the  calendar icon to specify the period you want to search.
   - Display - Use these radio buttons to filter the search results:
     - All – Select this option to display all the types of calls in the list.

- Incoming calls – Select this option to display only the calls that were received.
- Outgoing calls – Select this option to display only the calls that were placed.

- Limit search by call context – Use these radio buttons to filter the search results:
  - All – Select this option to display all calls.
  - Local calls – Select this option to display only calls made to local numbers (between extensions belonging to the same client).
  - Extended local calls – Select this option to display only calls made to extended local numbers (between extensions belonging to different clients).
  - External calls – Select this option to display only calls received from outside the system or sent to external destinations.
- Limit search by application – Use these checkboxes to filter the search results by the application used by Asterisk to handle the call:
  - Dial – Select this option to display calls between two phone terminals.

    Queue – Select this option to display calls targeted at queue extensions.

    Conference – Select this option to display conference calls.

    Voicemail – Select this option to display calls that ended in the voicemail mailbox.

    Voicemail Center – Select this option to display calls to an extension of type voicemail center.

    IVR – Select this option to display calls targeted at IVR extensions.

    Park – Select this option to display calls that were parked.

    Unpark – Select this option to display calls that were picked up form the parking lot.

    Callback - Select this option to display calls that were made using an extension of type callback.

    Calling Card - Select this option to display calls that were made using an extension of type calling card.

2. Click OK to display only the records that fit your search criteria.

Export to an Easy-to-edit Format

- Export to Excel – Click this button to export the call costs report to a Microsoft Excel file.
- Export to CSV – Click this button to export the call costs report to a CSV format file.

You have the possibility to customize the exported call cost report by choosing the columns you want to include in your report. To select the relevant columns that will appear in the exported report, click the Show `export` button in the upper right corner of the screen. Enable the checkboxes corresponding to the column names you want to export. Disable the checkboxes corresponding to the column names you want to leave out.

This is the list of all possible columns you can export in your customized report:

- Call flow
- Call type
- Application
- To number
- From number
- Call started - The date and time when the call started ringing on the destination phone.
- Call answered - The date and time when the call was answered. If the call was not answered, 4PSA VoipNow records the value: `0000-00-00 00:00:00`
- Call duration
- Call disposition - The way the call was terminated: it was either answered, not answered, failed, etc
- Client - The user name of the client account where the call originated.
- Client ID - The ID of the client account where the call originated.
- Billing plan - The billing plan that generated the call cost.
- Call cost The cost of the call as charged by the system administrator.
- Call profit The difference between the cost paid by the owner of the client account where the cost originated and the cost charged by the administrator.
- Money unit
- CallID - The unique ID of the call generated by 4PSA VoipNow.

- Transfer source - If the call was transferred to another extension, this column will list the source extension.
- Transfer destination - If the call was transferred to another extension, this column will list the destination extension.
- Initially called extension - If the call was picked up from another extension, this column will display the extension that was originally called.
- Callback caller-ID - If the caller used a callback extension to route its call to a remote destination, this column displays the authorized Caller-ID (the number from which the user dialed the system).
- Calling card code - If the caller used a calling card to call a destination number, this column displays the code introduced to authenticate and charge the call.

Call Flow Report

4PSA VoipNow offers the possibility to view all active calls in the system. To access this report page, click the Reports link in the left panel Navigation Area and then the Call Flows tab.

The following information is displayed for each active call:

- T – The type of the call displayed using an icon: local call, extended local call, external call.
- From – The contact name, Caller-ID, and the extension number (Anonymous if not known)
- To – The contact name, Caller-ID, and the extension number (Anonymous if not known)
- Call started – The date and time when the call was started
- Call duration – The duration of the call
- Channel – The channel used if the call is not local

The page is reloaded every 60 seconds. You can force the update by clicking the Refresh icon available in the top right side of the main frame.

Chapter 9

Manage PBX Features

View management sections

Most settings that change the system behaviour can be managed starting from this page. Settings are grouped based on target profile.

To access this page, click the PBX link in the left panel Navigation area. In order to manage a specific setting you must click on the icon that describes the section.

Public Phone Numbers

In the Public Phone Numbers page you can view a list of all the public phone numbers and the clients and extensions they had been assigned to.

To access this page, click the  Public Phone Numbers icon in the PBX Features page.

View the Public Phone Numbers

4PSA VoipNow displays the following information on each public phone number:

- T - The type of the public phone number. It can be Exclusive or Stacked
- Public Phone Number - The public phone number.
- DID - The DID (Direct Inward Dialing) number.
- Client - The client the public phone number has been assigned to.
- Extension - The extension the public phone number has been assigned to.
- Date Added - The date when the public phone number was added.

Search the Public Phone Numbers List

When the public phone number list is too long and you are searching for specific phone numbers, you can use the following features:

- Search - Write the text you are looking for in the textbox. Then click the button or the Search label to display only the public phone numbers that match the search criteria.
- Show All - Click the button or the Show All label to display the entire list.

Even if you navigate to other pages, the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of public phone numbers.

Another way to simplify the listing is to sort the public phone numbers list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the corresponding header.

Export to an Easy-to-edit Format

Export to Excel - Click this button to export the public phone numbers report to a Microsoft Excel file.

Export to CSV - Click this button to export the public phone numbers report to a CSV format file.

Chapter 10

Manage Sounds

View the Sound List

There are two types of sounds: music on hold and announcements sounds.

Music on hold sound files are played when a caller is on hold waiting for someone to answer his/her call. These sounds files are not language specific because they are usually melodies. Music on hold files can only be uploaded, not recorded over the phone.

An announcement sound is played when the user is notified on an event or when information is requested from the user. These sounds have different files for different languages, so that a user can listen to the sound version according to his/her language preferences. If the files in the requested language do not exist, the default files will be played. This type of sound can be either uploaded or recorded over the phone.

An announcement sound can be shared or non-shared. When the sound is shared, it is also available to lower level account owners (like extension levels). The non-shared sound is available in client context only.

In the Sound Management page, you can view a list of the sounds available in the system.

To access this page, click the PBX link in the left panel Navigation area. In the new page that opens, click the Sounds icon available in the PBX options area.

> Note
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

You can also perform multiple operations:

- Add and delete sounds from the system
- Search for specific sounds in the system
- Organize sound files by using sound languages and folders

4PSA VoipNow displays the following information about each sound:

- S – The status of the sound, displayed using an icon: Enabled and Disabled. Click the icon to change the sound's status.
- T – The sound type, displayed using an icon:
  - specifies a Shared sound (available to all users belonging to the user who created it)
  - specifies a User sound (available to the user who created it only)
- M – This field displays the purpose of the file by using an icon:
  - specifies an Announcement sound
  - specifies a Music on hold sound
- Name – The name of the sound. Click this link to edit the sound.
- Folder – The folder where the sound is located in the system
- Languages – The number of languages for which this sound is defined

  > Note
  >
  > If the sound is used as Music on hold, this field displays '-'.

- Modified – The date when the sound was last modified

Search the Sound List

When the sound list is too long and you are searching for specific sounds, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the sounds whose names contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of sounds.

Another way to simplify the listing is to sort the sound list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Add a New Sound

A new sound can be added only if there is at least one sound language available. To add a new sound, click the Sounds icon available in the PBX Features page, in PBX options area.

> Note
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

Follow these steps:

1. Click the Add sound icon available in the Tools area.
2. A new page opens allowing you to enter information on the new sound:
   - Sound form

- Name – The descriptive name for the sound
- This is music on hold – Use this checkbox to specify the purpose of the sound. When this option is selected, the sound can be played to a caller that is on hold. Otherwise, the sound is used for announcement purposes only.
- This is a shared sound – When this option is enabled, all the users belonging to your account can see and use this sound file.
- Folder – Use this dropdown list to select the folder where the sound will be stored.

- Record over the phone
  - I want to record sound over the phone – When this option is enabled, 4PSA VoipNow gives you the possibility to record the sound file over the phone rather than uploading it.
- Upload sound files
  - Filename – Click the Browse button to locate the sound file on your computer and upload it.

> **Note**
>
> 4PSA VoipNow accepts the following extensions for sound files: `.mp3`, `.wav`, `.gsm` and `.raw`.

If you are creating an announcement sound (i.e. the checkbox This is music on hold is not enabled), the following options are available:

- Language – Use this dropdown list to specify the language of the sound file uploaded in the system.
- Default sound file – When this option is enabled, this file is set as default for the sound. The default file is played for the callers with a phone language that is unavailable for the sound.

  For example, let's assume you have created a sound that announces callers that the extension user is on holiday. You have added versions of the announcement in English, French, and Dutch and set the English file as default. The English sound version will be played to any caller that has other phone language set.

> **Note**
>
> Each sound object must have one default sound file associated. When uploading several sound files at the same time, make sure you select only one default file. Otherwise, 4PSA VoipNow will display an error message.

3. You can use the [–] [+] buttons to remove/add versions of the sound in different languages.
   - [–] removes the `Upload sound` section
   - [+] adds another `Upload sound files` section
4. Click **OK** to add the new sound. Click **Cancel** to go back to the previous page without adding the sound.

Edit Sound Options

To access this page and edit the information on an existing sound, click the **Sounds** icon available in the **PBX Feature Management**, in the `PBX options` area. In the new page, you can modify the properties of a sound.

> **Note**
>
> The **Sounds** section is available only if the `Sound Management` permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

For example, you can:

- Add and delete files containing versions of the sound for different languages
- Change the shared flag of an announcement sound.

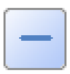
To edit the properties of a sound follow these steps:

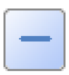
1. Click the name link of the sound you want to modify.
2. A new page opens allowing you to change the details of the sound. The content of this page depends on the purpose of the sound: announcement or `music on hold`.

If the sound is an announcement sound, the information is grouped in the following sections:

- **Sound form** – Use this section to:
  - Change the sound's type in shared by clicking This is a shared sound. Otherwise, the sound type is user and can only be used in the user context only.
  - Record sound file over the phone
- **Upload sound files** – Use this section to upload files containing versions of the sound in different languages.

> **Note**
>
> When you upload a sound file associated with a language that already exists, 4PSA VoipNow replaces the old file with the new version. Before this operation is performed, 4PSA VoipNow asks you to confirm the replacement.

3. Use the   buttons to remove/add versions of the sound in different languages.

   -  removes the corresponding Upload sound files section
   -  adds another Upload sound files section

   If the sound is music on hold type, you can use the Upload sound files section to replace the current music on hold file.

4. Click OK to save your changes. Click Cancel to go back to the previous page without changing the sound.

To manage the existing sound files associated with an announcement sound, follow the steps:

1. Click the name link of the sound you want to modify.
2. A new page opens allowing you to view a detailed list of the existing files. In the Existing sounds section, 4PSA VoipNow displays the following information about each file:
   - **Filename** – The name of the file. Click this link to download file on your computer.
   - **Sound file size** – The size of the file in Kb

- Folder – The folder where the file is located
- Language – The language associated with the sound file

> **Note**
>
> The default sound file of the sound object is displayed in **bold** format.

3. Click OK to save your changes. Click Cancel to go back to the previous page without changing the sound.

Search the File List

When the file list is too long and you are searching for specific sound files, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the sound files whose names contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of sound files in the system.

Another way to simplify the listing is to sort the sound file list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Remove Files

Choose the files you want to delete by selecting their corresponding checkboxes. Then click the Remove selected link. You will be asked to confirm the removal.

> **Note**
>
> System sounds and default sound files cannot be deleted. Their corresponding checkboxes are disabled.

Manage Sound Folders

View the Folder List

In the Sound Folder Management page, you can view a list of the sound folders available in the system. Multiple operations can be performed:

- Add a new sound folder
- Delete sound folders and their content
- Search for specific folders

To access this page, click the Sounds icon in PBX Feature Management page, in the PBX options area.

Note

The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

Next click the Folders icon.

4PSA VoipNow displays the following information about each folder:

- Folder name – The name of the sound folder
- Sound files – The number of sounds stored in the folder. Click this link to open a new page listing these sounds.
- Created – The date when the folder was added to the system

Search the Folder List

When the time folder list is too long and you are searching for specific time intervals, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the folders whose names contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the `Number of entries per page` link. The number of entries per page is shown in the left side of the table along with the total number of sound folders in the system.

Another way to simplify the listing is to sort the sound folder list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Add a New Sound Folder

Each time you add new sound files in the system you choose the folder name where you want them to be stored. If you want to store a sound in a specific folder, other than the ones already existent, you can add a new sound folder before adding sound files.

To create a new sound folder, click the Sounds icon in the PBX Feature Management page, in the `PBX options` area.

> **Note**
>
> The **Sounds** section is available only if the `Sound Management` permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

In the new page that opens, click the Folders icon and follow these steps:

1. In the Sound Folder Management page, click the Add folder icon.
2. A new page opens allowing you to enter the name of the new folder. Use the available textbox to name the new folder.
3. Use the buttons to add several folders at the same time.
   - adds a new folder input textbox
   - removes the corresponding textbox
4. Click `OK` to add the new sound folder(s). Click `Cancel` to go back to the previous page without adding the folder(s).

Delete Sound Folders

To remove sound folders from the system, click the Sounds icon available in PBX Feature Management page, in the PBX options area. In the new page that opens, click the Folders icon.

Note

The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

A new page opens displaying all the sound folders available in the system.

To delete sound folders follow these steps:

1. Choose the folders you want to delete by selecting their corresponding checkboxes.
2. Click the Remove selected link. A new page opens displaying the list of folders and the sounds located in the folders that will be deleted.

   Note

   When you delete a folder, you also delete all the sounds located in the folder.

3. Review the list. If you want to proceed with the removal, select the Confirm the removal checkbox and click OK. Otherwise click Cancel to return to the previous page without deleting anything.

Note

If the sounds inside the folder are currently used by extensions, these sounds cannot be deleted. The folder that contains them cannot be deleted either.

Manage Sound Languages

View the Language List

A sound file can be recorded in several languages so that the extension can listen to the specified announcement in his/her chosen language if available in the system. If the extension's language does not exist, then the announcement will be played in the default sound language.

In the Sound Language Management page, you can view a list of the languages available in the system. Multiple operations can be performed:

- View a detailed list of the system languages
- Add a new sound language
- Search for specific languages
- View the sounds that have files in different languages
- Delete sound languages from the system

To access this page, click the  Sounds icon available in PBX Features page.

> Note
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

Next, click the  Sound languages icon in the Tools area.

4PSA VoipNow displays the following information about each sound language:

- Language name – The name of the language

  > Note
  >
  > When there is no sound file associated with the language, you can click the language name link to rename the language properties.

- Sound files – The number of sound files in this language. Click this link to view the list of sound files.
- Created – The date when the language was added to the system

Search the Language List

When the language list is too long and you are searching for specific languages, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the languages whose names contain the text.
- Show all – Click this button or the Show all label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of sound languages in the system.

Another way to simplify the listing is to sort the sound language list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Add a New Language

To add a new language, click Sounds icon available in PBX Features page.

> Note
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

Next, click the Sound languages icon in the Tools area and follow these steps:

1. In the Sound Language Management page, click the Add Sound Language icon.
2. A new page opens allowing you to provide the name of the new sound language. Use the dropdown list to add one of the available languages to the system.
3. Use the buttons to add several languages at the same time.

- adds another dropdown list so you can create another language
- removes the corresponding dropdown list

4. Click OK to add the new sound language(s). Click Cancel to go back to the previous page without adding the language(s).

Edit Language Details

To change the details of a sound language, click Sounds icon available in the PBX Features page, in the PBX options area.

> **Note**
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

Next, click the Sound languages icon in the Tools area and follow these steps:

1. Click the name link of the language you want to modify.
2. A new page opens in which you can use the Name dropdown list to choose another name for the language.
3. Click OK to save your changes. Click Cancel to return to the previous page without renaming the language.

Delete Sound Languages

To remove sound languages from the system, click the Sounds icon available in the PBX Features page, in the PBX options area. Next, click the Sound languages icon in Tools area and follow the steps:

1. Choose the languages you want to delete by selecting their corresponding checkboxes.
2. Click the Remove selected link. A new page opens displaying the list of languages and their associated sounds that will be deleted.

3. Review the list. If you want to proceed with the removal, select the Confirm the removal checkbox and click OK. Otherwise click Cancel to return to the previous page without deleting anything.

Delete Sounds

To delete sounds in the system, click the Sound icon available in the PBX Features page, in the PBX options area.

> **Note**
>
> The **Sounds** section is available only if the Sound Management permission has been activated for your account. If this permission has not been activated, the **Sounds** icon will not be visible.

Choose the sounds you want to delete by selecting their corresponding checkboxes. Then click the Remove selected link. You will be asked to confirm the removal.

You cannot remove sounds that are currently used.

You cannot remove a sound object of type music on hold, if the following conditions are met:

- The folder where the sound is located is used.
- The sound is the only one left in the folder.

Chapter 11

Manage Your Time Intervals

View Your Time Intervals

Time intervals are used to match calls to a certain period of time. This can be done for billing reasons or to filter incoming/external calls. In Time Interval Management page, you can view a list of all available time intervals added to the system.

To access this page, click the PBX link in the left panel Navigation area. Next, click the Time intervals icon available in the PBX options area. Multiple operations can be performed:

- Add a new time interval
- Search the time intervals list
- Edit an existing time interval
- Delete time intervals

Time Interval Overview

4PSA VoipNow displays the following information about each time interval:

- T – The method used to define the time interval:
  - Individual days method
  - Interval method
- Name – The descriptive name of the time interval. Click this link to edit the time interval information.
- Hours – The hours used as limits of the time slot
- Weekdays – The days of the week used as limits of the time slot
- Month Days – The month period when the time interval applies
- Month – The month when the time interval applies
- Created – The date when the time interval was created

> **Note**
>
> There is one default time interval for each user in the system named `Full month` that covers the entire month.

Search the Interval List

When the time interval list is too long and you are searching for specific time intervals, you can use the following features:

- Search – Write the text you are looking for in the textbox. Then click the button or the Search label to display only the time intervals whose name, hours, weekdays or dates contain the text.
- Show all – Click this button or the `Show all` label to display the entire list.

Even if you navigate to other pages the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the `Number of entries per page` link. The number of entries per page is shown in the left side of the table along with the total number of time intervals.

Another way to simplify the listing is to sort the time interval list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Add Time Intervals

Time intervals are used on call filtering, call routing, billing plans, etc. Whenever a new account is created, the extension must have associated a billing plan to its account. The extension can be charged differently based on the call time interval.

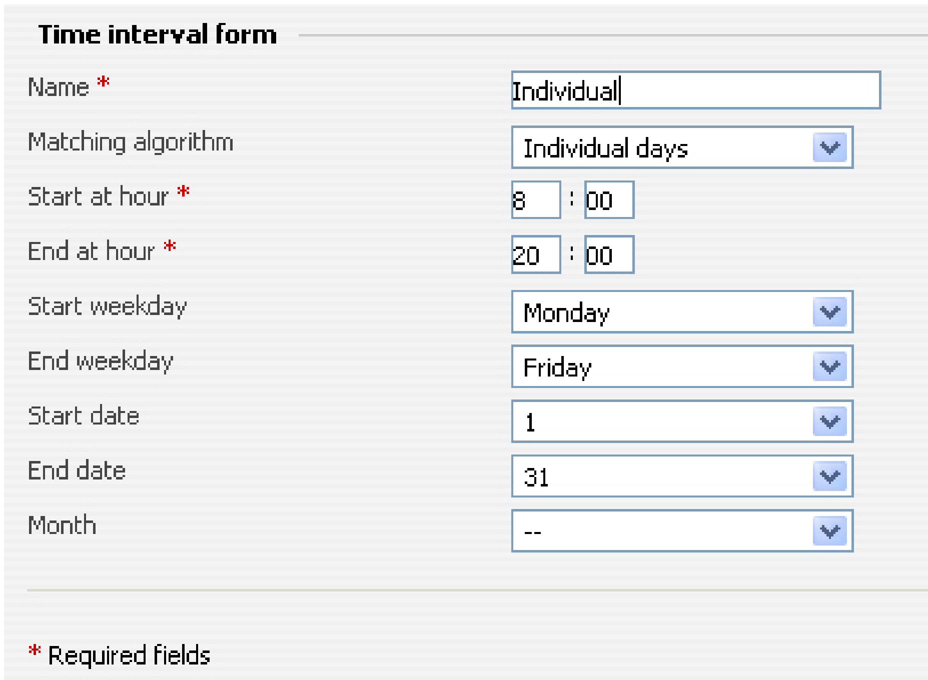
To add a new time interval to the system, click the Time intervals icon available in the PBX Features page, in PBX options area and follow the steps:

1. In the Time Interval Management page, click the Add time intervals icon.
2. A new page opens allowing you to enter information about the new time interval.
   - Name – Use the textbox to fill in a descriptive name to identify the time interval.
   - Matching algorithm – A time interval can be described in two ways:
     - Individual days – This method allows 4PSA VoipNow to match the same time interval in different days. See the example below.
     - Interval – This method allows 4PSA VoipNow to match a continuous time interval that extends over several days. See the example below.
   - Start at hour and End at hour – Use the available textboxes to specify the hours that limit the time slot.
   - Start weekday and End weekday – Use these dropdown lists to select the days of the week that define the time slot.
   - Start date and End date – Use these dropdown lists to select the days of the month that define the time slot.
   - Month - Use this dropdown list to select the month that defines the time slot.
3. Use the buttons to add several time intervals at the same time.
   - removes the corresponding `Time interval`
   - adds another `Time interval`

4. Click OK to add the new time interval(s). Click Cancel to go back to the previous page without adding the interval(s).

Example of a time interval defined in individual days

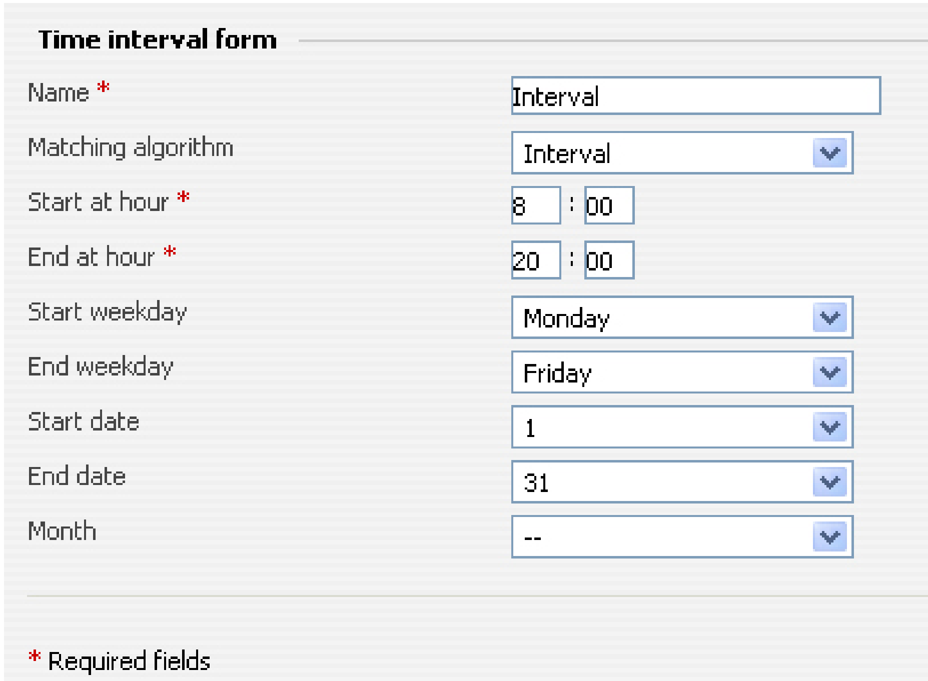
In the time interval below, 4PSA VoipNow matches calls made or received between the hours 8:00 – 20:00 on Monday, Tuesday, Wednesday, Thursday, and Friday between 1 and 31 every month.



A time interval defined in individual days

Example of a contiguous time interval

In the time interval below, 4PSA VoipNow matches calls made or received between Monday, 8:00 and Friday, 20:00, between 1 and 31 every month.



A continuous time interval

Edit a Time Interval

To edit the properties of a time interval, click the Time intervals icon available in the PBX Features page, in PBX options area and follow these steps:

1. In the time interval list, click the name link of the time interval you want to change.
2. A new page opens where you can rename the time interval and modify its start/end hours, days, dates. You can also change the matching algorithm.

> **Note**
>
> For more information on the fields in these sections, read the Add Time Intervals section.

3. Click OK to save the changes to the time interval. Click Cancel to return to the previous page without saving the changes.

Delete Time Intervals

To delete a time interval go to the PBX Features page and click the Time intervals icon available in the PBX options area. Choose the time intervals you want to delete by selecting their corresponding checkboxes. Then click the Remove selected link. You will be asked to confirm the removal.

Note

Time intervals can be removed only if they are not currently used.

Chapter 12

Manage Custom Buttons

4PSA VoipNow allows you to customize the functionality of the control panel by adding custom buttons linked to specific URLs.

In the Custom buttons page you can:

- View the list of custom buttons defined on your account
- Add new custom buttons to your account
- Edit the settings of the existing custom buttons
- Delete custom buttons from your account

To access this page, in the left panel click the PBX link. In the PBX options section of the new page that opens, click the  icon.

View the Custom Buttons List

In the Custom buttons page you can view the following details about existing custom buttons:

- S – The status of the button displayed using an icon: Enabled or Disabled.
- A – The availability of the button
- L – The location of the button: means that the button is displayed in the left panel and means that the button is placed in the right panel.
- I – The icon associated with the button

> **Note**
>
> If the button is associated with the default icon, 4PSA VoipNow displays

- Label – The label displayed under the button's icon
- Url – The URL linked with the button
- Priority – A value that defines the order in which buttons are displayed in the interface

Add a New Custom Button

To add a new custom button to your account, follow these steps:

1. In the Custom buttons page click the icon. A new page opens listing the parameters associated with the new button.
2. Use the following settings to define the look and behaviour of the button:
   - Label – Use this textbox to fill in the label displayed under the button's icon.
   - Title – Use this textbox to specify the tip that will be displayed when the mouse is positioned on the button's icon.
   - Location – Use this dropdown list to choose where the button will be displayed:
   - Default image for all skins – When this option is enabled, 4PSA VoipNow displays a default icon for the button. If you disable this checkbox, 4PSA VoipNow displays additional controls that allow you to load custom icons for the button:

- Use the Browse button to locate an graphic file on your computer.
- Enable the checkbox corresponding to the skin where the icon will be used.
- Enable the All skins checkbox if you want to use the same icon for all the 4PSA VoipNow skins installed on the server.
- You can use the ⊟ ⊞ buttons to add icons for different skins at the same time.

- Include reseller id – When this option is selected, 4PSA VoipNow appends the id of the currently selected reseller to the URL linked with the button.
- Include client id – When this option is selected, 4PSA VoipNow appends the id of the currently selected client to the URL linked with the button.
- Include extension id – When this option is selected, 4PSA VoipNow appends the id of the currently selected extension to the URL linked with the button.
- Include extension internal number – When this option is selected, 4PSA VoipNow appends the internal number of the currently selected extension to the URL linked with the button.
- Include extension public number – When this option is selected, 4PSA VoipNow appends the public phone number of the currently selected extension to the URL linked with the button.
- Include billing plan – When this option is selected, 4PSA VoipNow appends the id of the currently selected reseller to the URL linked with the button.
- Priority – The value in this textbox defines the order in which the custom buttons are displayed in the interface.
- Url – Use this textbox to fill in the url that will opened when the button is clicked.
- Context help – Use this textbox to specify the text that will be displayed in the left panel when the mouse is positioned on the button's icon.
- Inheritance level – Use this dropdown list to specify the visibility of the button:
  - 0 – The button is visible only on your interface account.
  - 1 – The button is visible only on your interface account and the accounts belonging to your clients.

  - 2– The button is visible only on your interface account, the accounts belonging to your clients and your extensions.
- Action – Use this dropdown list to choose if the url will be opened in the:
  - Current window or
  - New window

3. Click OK to create the button. Click Cancel to go back to the previous page without adding the button to the system.

Edit Custom Buttons

To edit the parameters associated with a custom button, in the custom buttons list click the name of the chosen button. In the new page that opens use the available controls to change the current settings. For more information see Add a new Custom Button

Delete Custom Buttons

To delete one or more custom buttons, in the custom buttons list enable the checkboxes corresponding to the desired checkboxes. Then click the Remove selected link. You will be asked to confirm the removal of the buttons.

Chapter 13

Manage Interface Preferences

4PSA VoipNow allows you to customize the default look and settings in the Interface Preferences page. On this page, you can define the interface language, the skin of the application, and the number of rows in records list.

To access this page, click the PBX link in the left panel Navigation area. Next, click the  Interface preferences icon available in the 4PSA VoipNow area.

You can adjust the following preferences based on your needs:

- Rows in table – Use this textbox to set the number of rows that will be displayed in your interface.
- Interface skin – Use this dropdown list to choose the skin used by the logged in user interface.
- System language – Use this dropdown list to choose the language used by the logged in user interface.

> **Caution**
>
> 4PSA VoipNow does not allow you to use language packs that were created for earlier versions of the interface. The following warning message is displayed:
>
> Impossible to switch to preferred interface language `{outdated language}`, because an outdated language pack is installed on the system. Please contact your provider to correct this situation.
>
> Only the system administrator can fix this problem.

- Program Logo – Choose the logo that will be displayed at the top of the user interfaces. Fill in the textbox with the location of the file on your computer or use the Browse button to locate the file.
- Logo URL – The logo file has a hyperlink on it. Use this textbox to fill in the destination of this hyperlink. It can be your business website for example.

Click OK to save your changes. Click Cancel to go back to the previous page without updating the preferences. The Default button overwrites your own account settings with the default settings.

> **Caution**
>
> It is recommended to use an image file in a `GIF`, `JPEG`, or `PNG` format with a height of 50 pixels.

Chapter 14

Manage Email Notifications

4PSA VoipNow can send email notifications to its users when standard events occur. The text of the notifications can be customized. The system can be also setup to send only some notifications and only to certain users.

To access this page, click the Email templates icon available in PBX Features page, in the System templates area.

You can set the notification preferences for a series of events displayed on the first column. The users interested in receiving notifications are:

- The reseller account owner – You could be interested in the events targeting the clients and extensions on their account.
- The client account owners – These users could be interested in the events targeting the extensions on their account.
- The extension account owners – These users could be interested in the events targeting their Voicemail mailbox.

Note

To enable all the checkboxes in a column, click the column's header. For example, if you want to enable all the checkboxes in the `Reseller` column, click the `Reseller` header.

Therefore you can enable email notifications for client and extension account owners as well as for your own account. However, the settings made are available until the user targeted by the notification (client or extension) changes them. When a new account is created, it inherits the upper level account email notification options. Afterwards, the account owner can change these options in the same way in the Email templates page.

When an account is created, the new owner can receive a mail notifying him/her that the account was registered. This notification is made only if the upper level account owner has the notification enabled.

Note

The email notification will be sent to the email address specified in the account information.

Notification emails can also be sent to an email address specified in the `E-mail address` column. This email address can be different for each selected event.

The events that can trigger an email notification are displayed in `Email templates` section:

- Yourself
  - Reseller account expiration warning – Email notification triggered by this event is sent {days} days in advance as specified in the `Send expiration notices` field.
  - Reseller account expired
  - Reseller billing limit warning – Email notification triggered by this event is sent when the available number of minutes is below {minutes} minutes as specified in the `Send billing limit warnings when the account is below` field.
  - Reseller billing limit exceeded

  For this group of events, 4PSA VoipNow can send email alerts to the following users:

  - The reseller account owner

  - A custom email address
- Your clients
  - Client account creation
  - Client account expiration warning – Email notification triggered by this event is sent {days} days in advance as specified in the Send expiration notices field.
  - Client account expired
  - Client billing limit warning – Email notification triggered by this event is sent when the available number of minutes is below {minutes} minutes or when the credit is below {credit limit} as specified in Send billing limit warnings when the account is below field.
  - Client billing limit exceeded

  For this group of events, 4PSA VoipNow can send email alerts to the following users:
  - The reseller that owns the client account
  - The client account owner
  - A custom email address
- Your extension
  - Extensions creation
  - Extension expiration warning – Email notification triggered by this event is sent {days} days in advance as specified in Send expiration notices field.
  - Extension expired
  - Extension billing limit warning – Email notification triggered by this event is sent when the available number of minutes is below {minutes} minutes or when the credit is below {credit limit} as specified in Send billing limit warnings when the account is below field.
  - Extension billing limit exceeded

  For this group of events, 4PSA VoipNow can deliver email alerts to the following users:
  - The reseller that owns the extension account
  - The client that owns the extension account
  - A custom email address
- Voicemail message notification

  4PSA VoipNow can deliver email alerts for this event to the following users:

    - The extension account owner
    - A custom email address
- Fax message notification

  4PSA VoipNow can deliver email alerts to the following users:
    - The extension account owner
    - A custom email address
- Forgot password – For this event, 4PSA VoipNow will send to the user who forgot his/her password and requested a new one an email message containing a temporary password. This password is valid only the amount of time specified in Login Preferences page in the Expiration time for new password field.

In Preferences section the reseller can specify the conditions in which the warning emails will be sent:

- Send expiration notices {X} days in advance – Use this textbox to specify how many days before the account expiration a notifications is dispatched to the users.
- Send billing limit warnings when the account is below {x} minutes or {y} {money unit} – A billing limit warning is generated in one of the following cases:
    - The minutes remaining in Available external outgoing minutes plus the minutes remaining in External over usage go below a certain limit.

      Use the first textbox to specify this minutes limit.
    - The credit remaining in Limit for external outgoing calls goes below a certain limit.

      Use the second textbox to specify this money limit.
    - The credit remaining in Limit for external incoming calls goes below a certain limit.

      The money limit you introduced for external outgoing calls in the above textbox, includes the external incoming calls money limit.

To enable notifications for users, follow the steps:

1. From the available checkboxes, select the ones corresponding to the users you want to notify for that event.
2. Click OK to save your options. Click Cancel to return to the previous page without saving the changes you have made.

Customize Email Content

To customize the subject and content of an email notification, follow these steps:

1. Click the icon corresponding to the chosen event.
2. A new page opens allowing you to edit the email subject and email body. Modify the text, keeping in mind the following rules:
   - You may use only plain text when writing the email subject and content. The email is also sent in plain text format.
   - You can include tags that will be automatically replaced by the system with the appropriate content. Examples: `[recipient_name]` is replaced with the name of the person receiving the notification.
3. Click OK to save the changes to the email. Click Cancel to return to the previous page without saving the changes.

Restore the Default Settings

To restore the default notification settings and email contents, click the Default button.

Note

When you click the **Default** button, 4PSA VoipNow will not overwrite the other email address destination.

Chapter 15

Manage Sessions

View the Sessions List

In order to view the sessions list click the Sessions link available in the left panel Navigation area. This link will open the Manage Sessions page, where you can view a list of all the sessions. Multiple operations can be performed on the sessions:

- Search the existing sessions
- Delete sessions

4PSA VoipNow displays the following information on each session:

- T - The type of the user that logged in the system displayed using an icon: Reseller, Client or Extension.
- Login - The username of the user that logged in the system.
- IP - The IP of the machine after which the user logged in the system.
- Logon time - The time when the user logged in the system.

Search the Sessions List

When the sessions list is too long and you are searching for specific sessions, you can use the following features:

- Search - Write the text you are looking for in the textbox. Then click the button or the Search label to display only the sessions whose login or IP contain the text.
- Show all - Click this button or the Show all label to display the entire list.

The search criteria will be retained even if you navigate to other pages until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table along with the total number of reseller accounts in the system.

Another way to simplify the listing is to sort the sessions list by clicking a table header link. The order criteria are marked by the highlight of the table header where the arrow indicates the direction. The sort direction can be changed by another click on that header.

Delete Sessions

To delete registered sessions, follow these steps:

1. Choose the sessions you want to delete by selecting their corresponding checkboxes in the Manage Sessions page.
2. Click the Remove selected link. You will be asked to confirm the removal. If you want to proceed with the removal, click OK, otherwise click Cancel.

Login History

You are able to see a detailed history of the login sessions by clicking the Login History button located in the Tools section of the Session Management page.

The following information is available:

- T - The icon in this column shows the level of the user. It can be:

- - Reseller
- - Client
- - Extension

- O - The icon in this column shows if the respective user is logged in or not. The icon can be:
  - - User is online
  - - User is offline
- Username
- Number of logins - The number of the login sessions established by the respective user.
- First login - The date and time when the user logged in for the first time.
- Last login - The date and time when the user last logged in.

Searching In The Login History List

When the login history list is too long and you are searching for specific sessions, you can use the following features:

- Search - Write the text you are looking for in the textbox. Then click the button or the Search label to display only the records who contain the text.
- Show all - Click the button or the Show `all` label to display the entire list.

Even if you navigate to other pages, the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the `Number of entries per page` link. The number of entries per page is shown in the left side of the table.

Another way to simplify the listing is to sort the list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Login history of a specific account

You are able to see the login history of a specific account by clicking the respective username in the login history list. The page containing the login history of a specific account displays the following information:

- Login Time - The date and time when the user logged in
- IP Address - The IP address where the user logged in from
- Hostname - The hostname where the user logged in from

Searching In The Login History List

When the login history list is too long and you are searching for a specific record in the list, you can use the following features:

- Search - Write the text you are looking for in the textbox. Then click the button or the Search label to display only the records who contain the text.
- Show all - Click the button or the Show all label to display the entire list.

Even if you navigate to other pages, the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table.

Another way to simplify the listing is to sort the list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Failed Logins

You can see a list of the failed login attempts by pressing the Failed Logins button in the Tools section of the Sessions Management page.

The following information is available:

- Login Time - The date and time of the login attempt
- Username - The username used for the login attempt
- Message - The reason the login attempt failed
- IP Address - The IP address of the user who attempted to login
- Hostname - The Hostname of the user who attempted to login

Searching In The Login History List

When the failed login history list is too long and you are searching for specific records, you can use the following features:

- Search - Write the text you are looking for in the textbox. Then click the button or the Search label to display only the records from the list who contain the text.
- Show all - Click the button or the Show all label to display the entire list.

Even if you navigate to other pages, the search criteria will be retained until a new search is performed.

You can change the number of records displayed on the page by clicking the Number of entries per page link. The number of entries per page is shown in the left side of the table.

Another way to simplify the listing is to sort the list by clicking a table header link. The order criteria are marked by the highlight of the table header and the arrow indicates the direction. The sort direction can be changed by another click on the respective header.

Chapter 16

Global Account Management

The Single Sign On (SSO) mechanism was designed to provide a centralized point of login for a user in multiple applications. The user creates a special account (Global Account) that will be used later by other applications to make the connection between the interfaces.

To access the Global Account Setup page, click the Global Account link located on the left frame navigation area.

Connecting To A Global Account

You can connect to a global account with an existing user, or you can create a new global account.

Click the Connect to global account icon.

In the new page that opens, make sure that the Use existing global account checkbox is selected, specify the global account username and password and click OK to connect to the global account.

Note

If several local accounts are connected to a global account, when logging in to the VoipNow interface using the global account, the user will be asked to select from the local accounts connected to the same global account.

To create a new global account, select the **Create new global account** checkbox, set the username and password for the new account and click **OK** to create the new global account.

Note

When creating a new global account, the respective account will be created on the SSO server.

Changing the password for a global account

You can change the password for the connected global account by pressing the **Change password** icon.

In the new page that opens, submit the existing password and set a new one.

Disconnecting from a global account

If you are connected to a global account and wish to disconnect, click the **Disconnect from global account** icon. In the new page that opens, select the **Confirm disconnection from global account** checkbox and click **OK**.

Appendix A. Using the Text To Speech Feature

The text to speech feature allows you to convert written text into speech. 4PSA VoipNow uses the text to speech engine developed by Cepstral.

Controlling How the Text is Read

The Cepstral engine allows you to control the voice reading the text by specifying attributes such as rate, pitch, and volume or inserting pauses. This can be achieved by using a set of HTML-like tags; the tags make up the Speech Synthesis Markup Language (SSML).

This section offers a set of SSML examples that can be used with the Cepstral engine. For more detailed descriptions of the elements and attributes of the markup language, see the official W3C SSML Specification: http://www.w3.org/TR/speech-synthesis/

Inserting silence / pauses

You can insert pauses between words, sentences or paragraphs by using the `<break>` empty tag. To control the length of the break, you can use two attributes: `strength` and `time`.

"There is no `<break strength='none' />` pause here."

"This is a `<break strength='x-weak' />` pause between words."

"This is a `<break strength='weak' />` longer pause between words."

"This is a `<break strength='medium' />` pause between sentences."

"This is a `<break strength='strong' />` pause between paragraphs."

"This is a `<break strength='x-strong' />` longer pause between paragraphs."

"This is a `<break time='2s' />` two second pause."

"This is a `<break time='4500ms' />` 4.5 second pause."

"This is a `<break />` pause between sentences."

Controlling Speech Rate

You can control the rate of the speech by using the prosody element and specifying a value for its `rate` attribute.

"I am now <prosody rate='x-slow'>speaking at half speed.</prosody>"

"I am now <prosody rate='slow'>speaking at 2/3 speed.</prosody>"

"I am now <prosody rate='medium'>speaking at normal speed.</prosody>"

"I am now <prosody rate='fast'>speaking 33% faster.</prosody>"

"I am now <prosody rate='x-fast'>speaking twice as fast</prosody>"

"I am now <prosody rate='default'>speaking at normal speed.</prosody>"

"I am now <prosody rate='.42'>speaking at 42% of normal speed.</prosody>"

"I am now <prosody rate='2.8'>speaking 2.8 times faster than normal</prosody>"

"I am now <prosody rate='-0.3'>speaking 30% more slowly than normal.</prosody>"

"I am now <prosody rate='+0.3'>speaking 30% faster than normal.</prosody>"

Controlling Voice Pitch

You can control the pitch of the speech by using the prosody element and specifying a value for its pitch attribute.

"<prosody pitch='x-low'>This is half-pitch</prosody>"

"<prosody pitch='low'>This is 3/4 pitch.</prosody>"

"<prosody pitch='medium'>This is normal pitch.</prosody>"

"<prosody pitch='high'>This is twice as high.</prosody>"

"<prosody pitch='x-high'>This is three times as high.</prosody>"

"<prosody pitch='default'>This is normal pitch.</prosody>"

"<prosody pitch='-50%'>This is 50% lower.</prosody>"

"<prosody pitch='+50%'>This is 50% higher.</prosody>"

"<prosody pitch='-6st'>This is six semitones lower.</prosody>"

"<prosody pitch='+6st'>This is six semitones higher.</prosody>"

"<prosody pitch='-25Hz'>This has a pitch mean 25 Hertz lower.</prosody>"

"<prosody pitch='+25Hz'>This has a pitch mean 25 Hertz higher.</prosody>"

"<prosody pitch='75Hz'>This has a pitch mean of 75 Hertz.</prosody>"

Controlling Output Volume

You can control the volume of the speech by using the prosody element and specifying a value for its volume attribute.

"<prosody volume='silent'>This is silent.</prosody>"

"<prosody volume='x-soft'>This is 25% as loud.</prosody>"

"<prosody volume='soft'>This is 50% as loud.</prosody>"

"<prosody volume='medium'>This is the default volume.</prosody>"

"<prosody volume='loud'>This is 50% louder than normal.</prosody>"

"<prosody volume='x-loud'>This is 100% louder than normal.</prosody>"

"<prosody volume='default'>This is the default volume.</prosody>"

"<prosody volume='-33%'>This is 33% softer than normal.</prosody>"

"<prosody volume='+33%'>This is 33% louder than normal.</prosody>"

"<prosody volume='33%'>This is 33% louder than normal.</prosody>"

"<prosody volume='33'>This is 33% of normal volume than normal.</prosody>"

Adding Emphasis to Speech

You can control the stress placed on certain pieces of text by using the emphasis element and specifying a value for its level attribute.

> **Note**
>
> The nature of emphasis differs between languages, dialects or even voices. Languages indicate emphasis using a possible combination of pitch change, timing changes, loudness and other acoustic differences

"This is <emphasis level='moderate'>stronger</emphasis> than the rest."

"This is <emphasis level='strong'> even stronger</emphasis> than the previous."

"This is <emphasis level='none'>the same as</emphasis> than the rest."

"This is <emphasis level='none'>the opposite of</emphasis> emphasis."

Note

The **none** level is used to prevent the synthesis processor from emphasizing words that it might typically emphasize.

Spelling Words Phonetically

The phoneme element provides a phonemic/phonetic pronunciation for the contained text. The ph attribute is a required attribute that specifies the phoneme/phone string.

"You say <phoneme ph='t ah0 m ey1 t ow0'>tomato</phoneme>, I say <phoneme ph='t ah0 m aa1 t ow0'>tomato</phoneme>"

For a complete list of available phonemes for your language, please see the Cepstral page Editing the Lexicon.