Call Accounting Mate

Setup & Installation Guide

TABLE OF CONTENTS

1. 0 Overview

Call Accounting Mate (CAM) can connect to virtually any telephone system, collect call detail records (CDR) and allocate cost. With the growing number of IP phone systems and communication servers, customers need a solution that can keep up with the times. Customers want an easy to navigate application that will not require countless hours or resources or training.

CAM includes many preset and ad hoc reports, support for account and pin codes for client biling, a contact database for identifying business and personal calls, and a built-in query builder. It is 100% browser based with a built-in Web server and an embedded SQL database engine. It can monitor emergency calls, misuse, network traffic patterns and cost allocation. Third party applications can access priced call detail records through an XML interface. The program is designed to work in any country around the world. The tariff tables are user configurable. The software has a library of JavaScript drivers designed to work with virtually any telephone system from all major manufacturers including Avaya, Cisco, Nortel, Siemens, Alcatel, NEC, Samsung, Panasonic and Asterisk.

Most environments can install this application on an existing non-dedicated computer. This software will operate on Pentium computer 200 MHZ or greater, operating Microsoft Windows 98 SE or later and Internet Explorer 5.5 or later. With CAM, SMDR/CDR data collection is completely integrated within the application. There is no requirement for additional hardware buffers. Data is captured via either an RS-232 (serial) or IP connection between your telephone system and the computer operating our CAM software.

Authorized users can access the software via Internet Explorer and generate reports at any time from their own Desktop PC. CAM will generate up-to-the-minute information that highlights network traffic, corporate cost allocation, account code billing, dialing patterns and misuse and abuse. Reports can be generated in PDF or Excel format and delivered to the screen, the hard driver, and/or printer. Reports can also be distributed by email. Users can customize reports by entering personnel, telephone line and customer information into the applications databases.

This document is provided as a quick installation and start-up user guide. It provides step by step installation procedures. Basic configuration and operational instructions are also provided.

1.1 Notice

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2.0 Hardware Configuration / Requirements

2.1 Hardware Connectivity

The following configuration diagram illustrate connectivity options for traditional telephone systems (serial connections), IP telephone systems (TCP/IP connections) and buffer boxes (serial/TCP IP connections) to the CAM Host computer operating the CAM software.
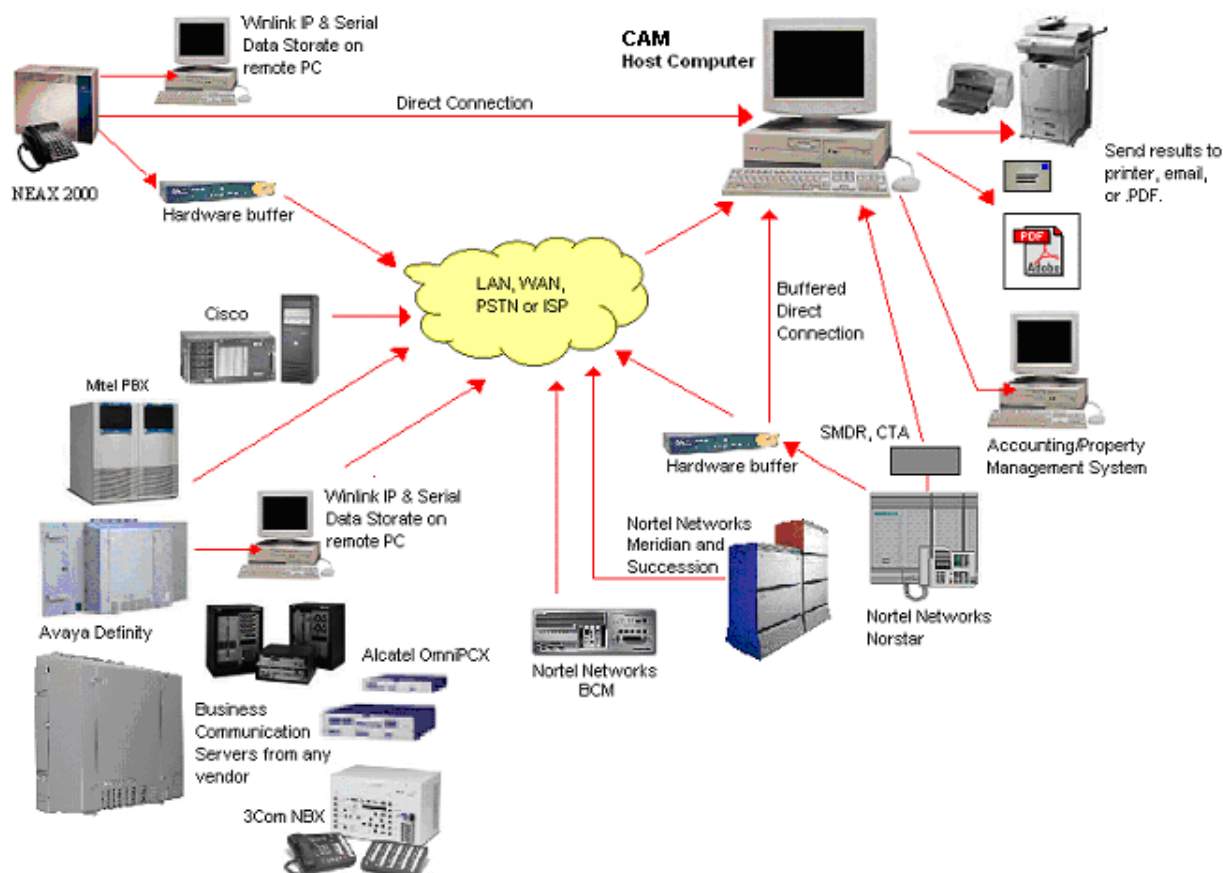
Serial Connections
An RS-232 connection between the PBX/Key Systems SMDR/CDR port and the desktop computer operating our CAM solution is required. The PBX/Key System must be programmed to deliver CDR information via this RS-232 connection to the desktop computer.

IP Connections
The CDR feature must be activated on the IP Telephone System. Both the IP Telephone System and the workstation operating our CAM software must be connected to the same LAN/WAN. The lines between IP Telephone System and the workstation are provided to illustrate the presence of a network connection.

CAM Host Computer
The workstation operating the CAM software must utilize a Microsoft© Windows operating system (Windows 98 SE or later).

2.2 Telephone System Requirements

Please consult your telephone system manufacturer's documentation for a detailed list of telephone system programming and hardware required to implement a Call Accounting application. Please note, programming and hardware required will vary from manufacturer to manufacturer.

2.3 Call Accounting Mate System Requirements

CAM has been written to capitalize on the advantages of Microsoft Windows operating systems. You must be running either Windows 98 SE or higher, or Windows 2000 or higher for CAM to function. Do not attempt to run under Windows 3.1 with the Win32s installed as this is not an approved OS and will not be supported.

CAM was designed to work with most commercially available telephone systems. CAM supports connection between your telephone system and the computer operating our software via one of following:

- Serial Port (RS-232)
- Network (telnet, TCP, UDP, Nortel BCM, Avaya IP Office)
- ODBC (Asterisk-MySQL, Cisco Call Manager)
- File

CAM can operate on both stand-alone computers and network environments. The following computer equipment and software is required to implement CAM on a desktop.

- **Computer**   Pentium 200 MHZ or greater
- **O/S**   Windows 98 SE or greater with IE 5.5 or later)
- **CD ROM**   Required
- **Disk Space**   30 MB or greater (depending on call volumes)
- **RAM**   64 MB (Windows 98/ME), 128 MB (Win2000, XP)
- **Serial Port**   Not required with some IP Telephone Systems (i.e. Nortel, Cisco, Avaya, etc.)
- **Network**   Required for multi-user environments and IP Telephone Systems

3.0 Installing Call Accounting Mate

Installation of CAM is quite simple. Before attempting to install the software please refer to the System Requirements sections of this guide to make sure that your environment meets the minimum requirements.

First, you must verify all necessary telephone system programming required to generate SMDR/CDR records has been completed. Additionally, either a hardware (serial) or network connection (TCP/IP) between your telephone system and the computer operating our software has been completed (please consult your telephone system vendor's documentations for this information). Customers connecting to their telephone system via an RS-232 connection can utilize Windows HyperTerminal program (press the Start Button, next select Programs, Accessories, Communications and then HyperTerminal) to verify CDR/SMDR records are being generated. Customers connecting to an IP Telephone Systems should consult the manufacturers documentation for details on how to verify CDR is functioning.

Once you have activated your telephone system's CDR/SMDR feature and completed the connection between it and the computer operating our software, you can proceed to install the CAM software. Install CAM by using the following instructions:

1. Download the CAM software from our web site www.callaccounting.ws. Next, open/execute the downloaded file cam###.exe (if you received you CAM software on CD-ROM, insert the CD-ROM into the computer's CD-ROM drive). The installation program will now start. The following introduction window should now appear on your screen.
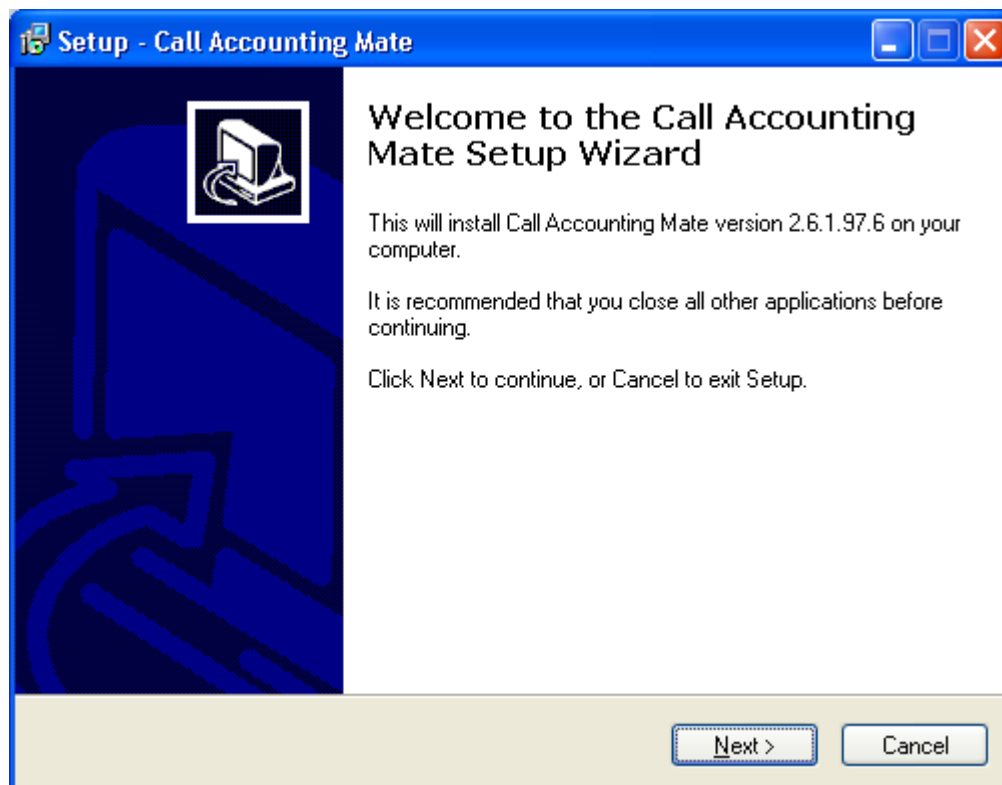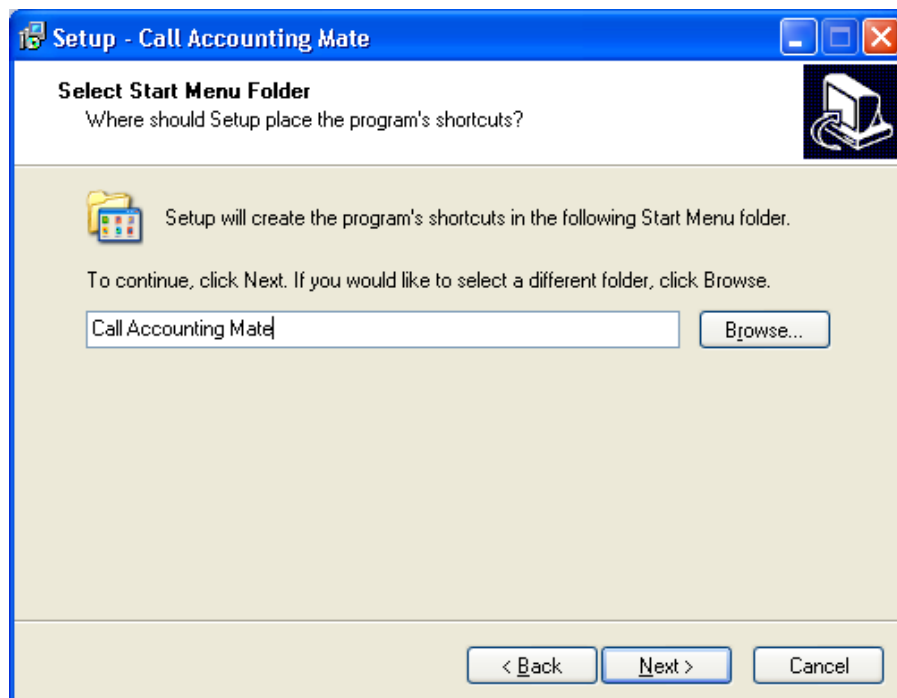

Press the **Next** button to proceed with the installation or the **Cancel** button to abort the installation.

2. The Installation program may now display additional information about the CAM Software. Please carefully read any information that is presented before proceeding.
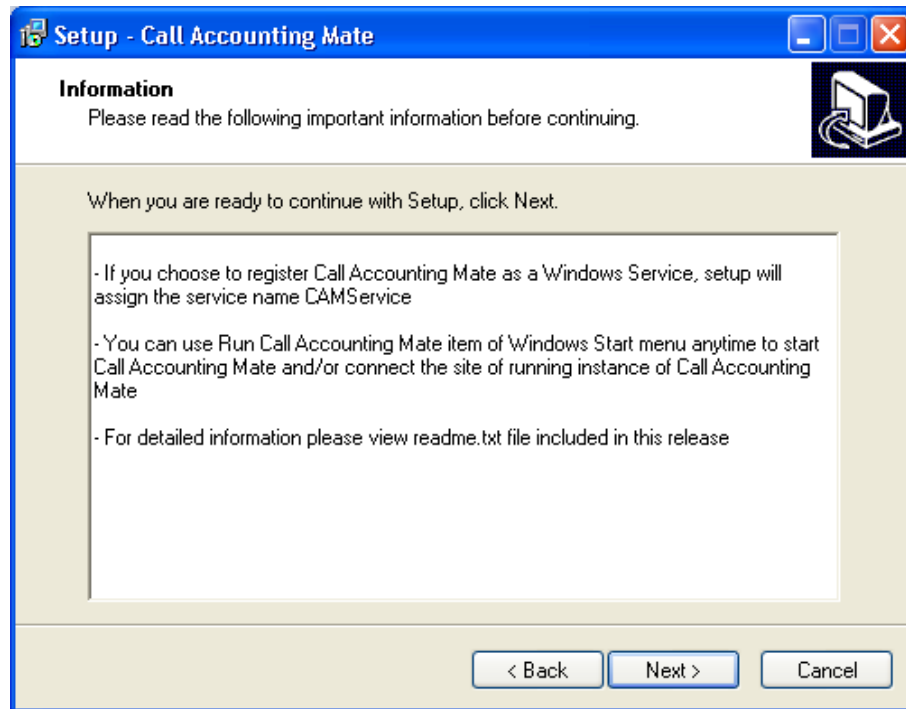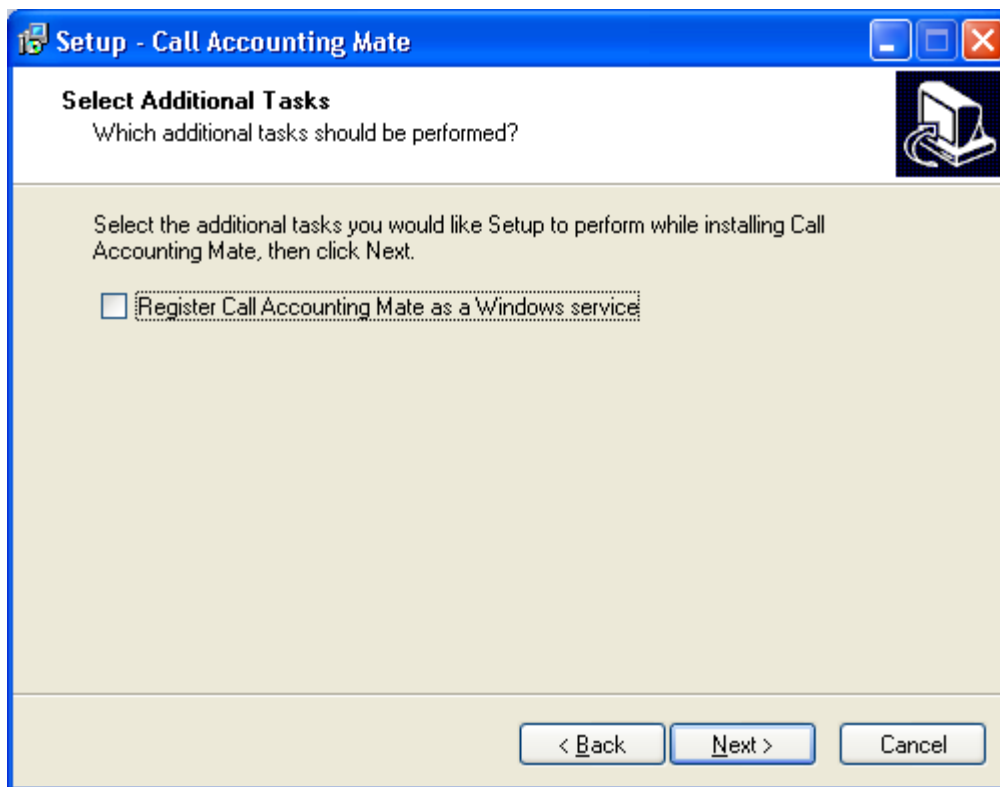

Press the **Next** button to proceed with the installation or the **Cancel** button to abort the installation.

3. The installation program will now prompt you to specify where you would like the CAM start menu short-cuts to be installed. We recommend you install the software in the default location (i.e. Call Accounting Mate).

To change the short-cut location press the **Browse** button. Once the desired location has been selected press the **Next** button to continue or the **Cancel** button to abort the installation.

4. Next the Installation program will present the Select Additional Tasks dialog.

Checking the **Register Call Accounting Mate as a Windows service** option will configure the CAM Web server to automatically start each time the computer is booted. Additionally, users will be able access the software from their desktop even if the computer operating the CAM software is not logged in.

Press the **Next** button to proceed with the installation or the **Cancel** button to abort the installation.

5. The Ready to Install dialog box should now be visible on your screen.
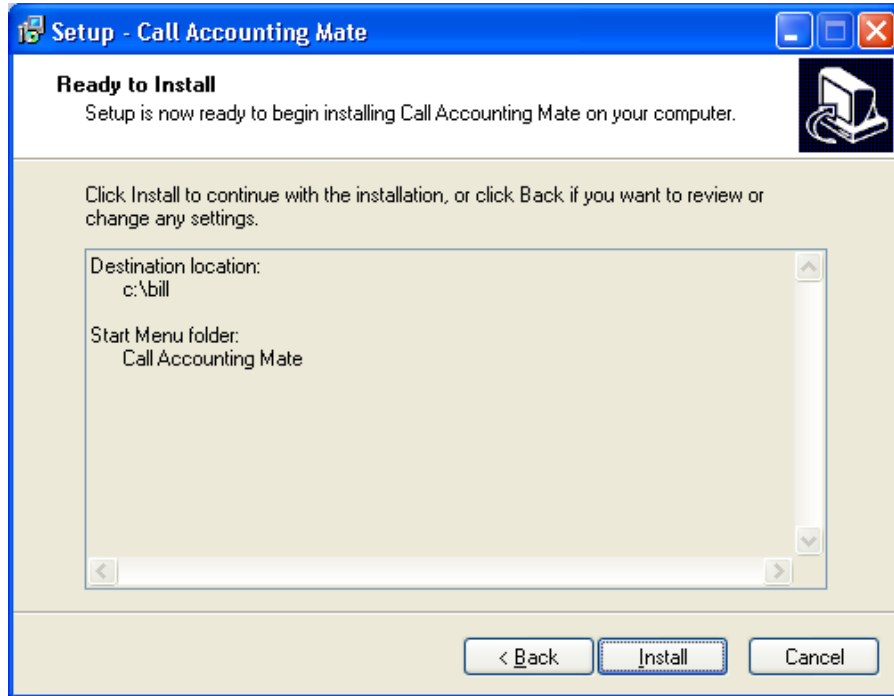

Verify the installation settings you have chosen are correct (i.e. Destination Location and Start Menu folder). Press the **Back** button to modify your settings, press the Install button to **Install** the software or press **Cancel** button to abort the installation.

6. Press the install button to copy and install the software from the CD to your computer. The following dialog box highlighting the progress of the installation will be presented.
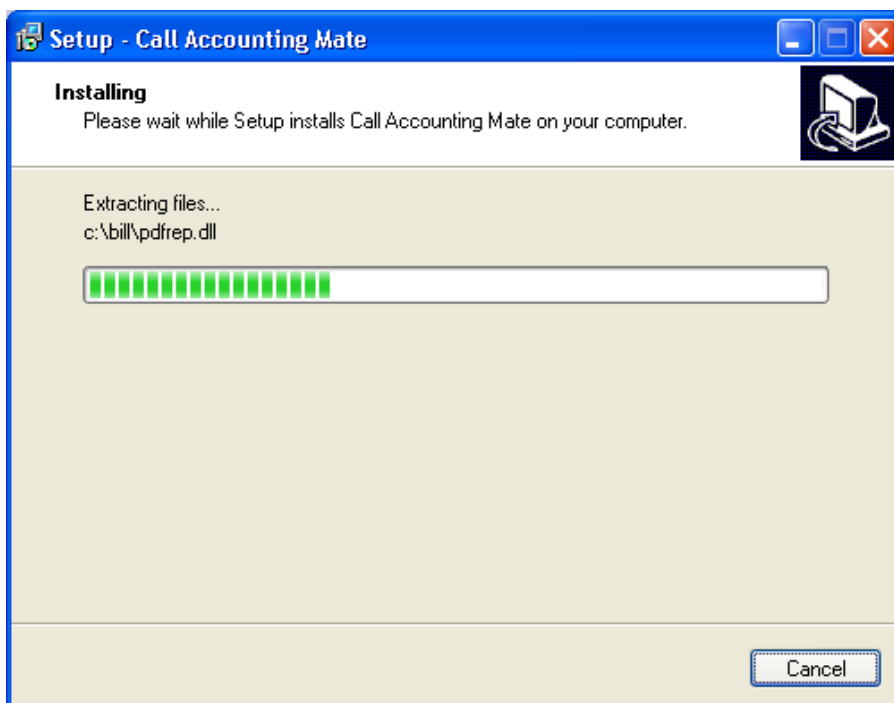
The installation process may take from a few moments to several minutes depending on the speed of your computer. If you encounter installation errors please ensure you have enough disk space and/or computer rights to install this application. If an error occurs and you require assistance please contact us at support@callaccounting.ws. You can abort the installation at anytime by pressing the **Cancel** button.

7. Once the installation has successfully completed the following confirmation screen will be displayed.
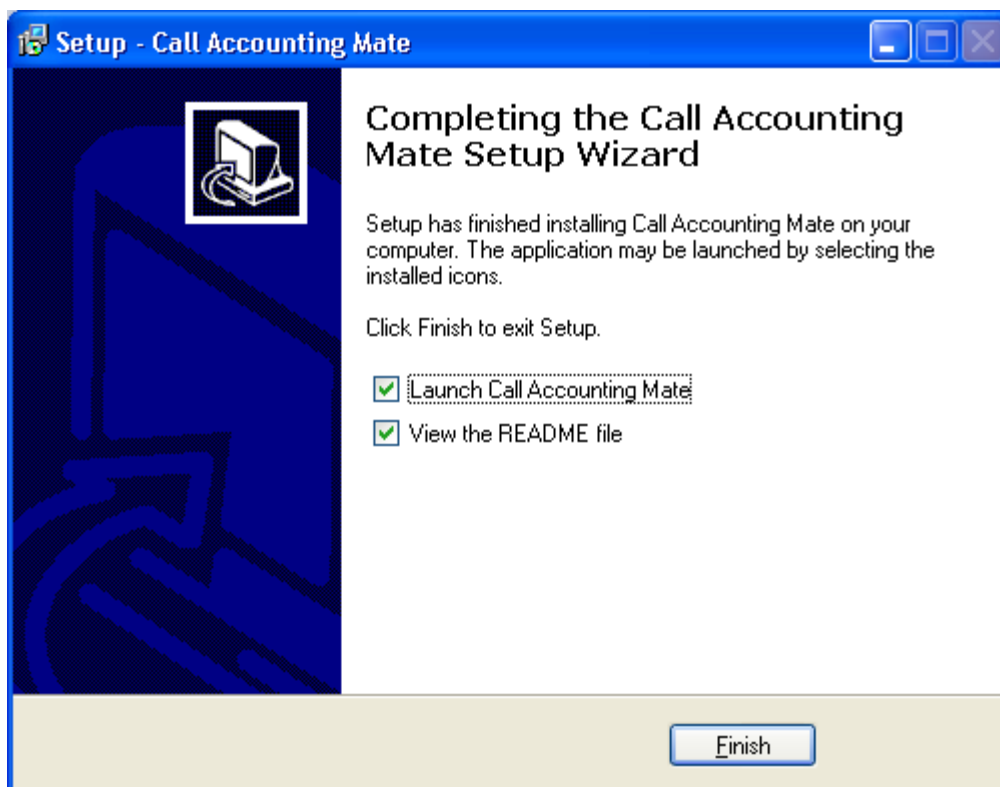
Press the Finish button to complete the installation. Some operating systems may display an additional screen prompting you to restart you computer.

Once the installation program is complete you are ready to begin using our CAM software.

# 4.0 Starting and Configuring Call Accounting Mate

The CAM software is primarily used to track and report on an organization's telephone activities. However before you can use the software you must configure it with your telephone system information. The CAM software must be installed prior to configuration (see Installing Call Accounting Mate). This chapter provides details on how to launch and configure the CAM software.

4.1 Starting Call Accounting Mate

To start the CAM software use the following steps

1. Press the Windows Start button.
2. Select the Programs menu item.
3. Select the Call Accounting Mate menu item.
4. Click the Run Call Accounting Mate icon.

The CAM software will now launch. The very first time you start the CAM software the following window will appear. Please note, if you have previously started the CAM software this screen will not appear. Instead the CAM Login screen will be displayed (see next page).
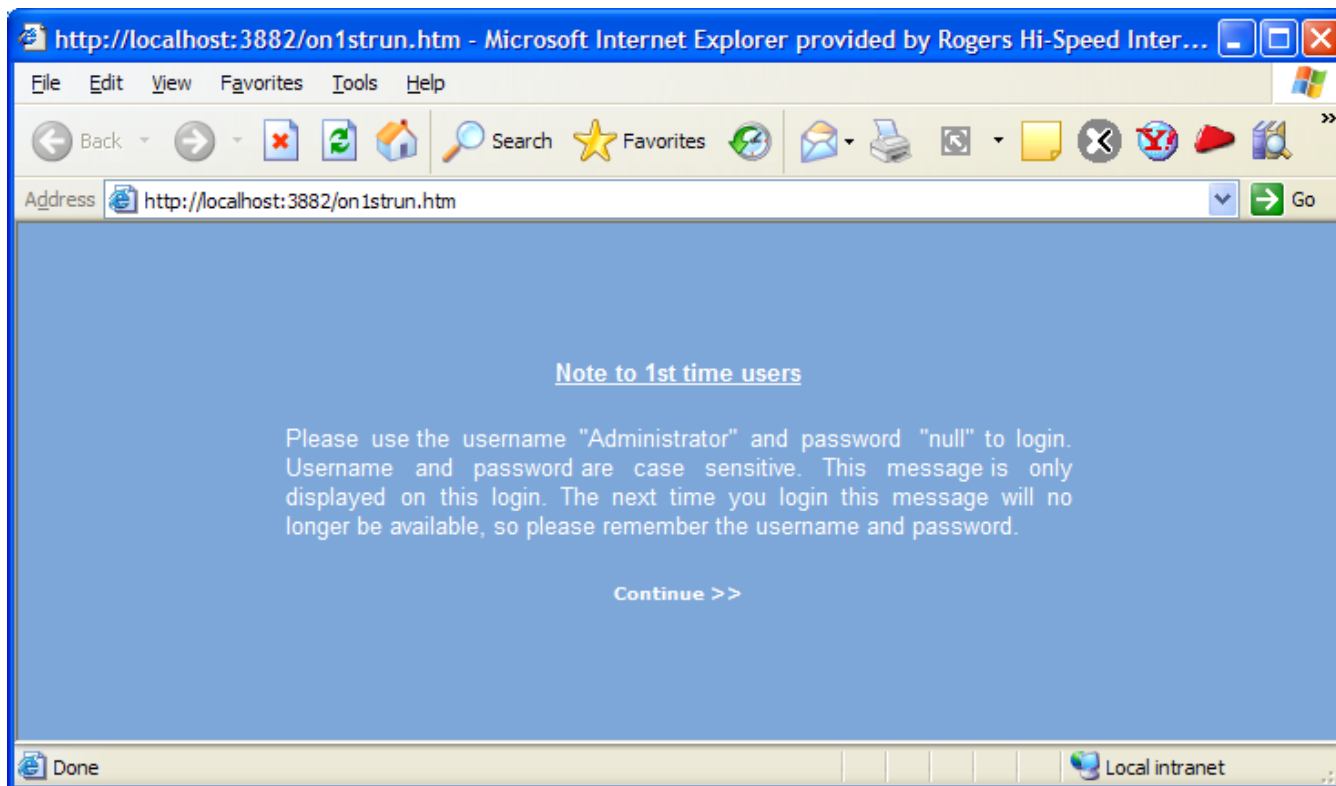
Now Click the **Continue >>** short cut to access the CAM software login screen.

A valid User Name and Password is required to access the CAM software. An example of the Login Validation scren is pictured below.
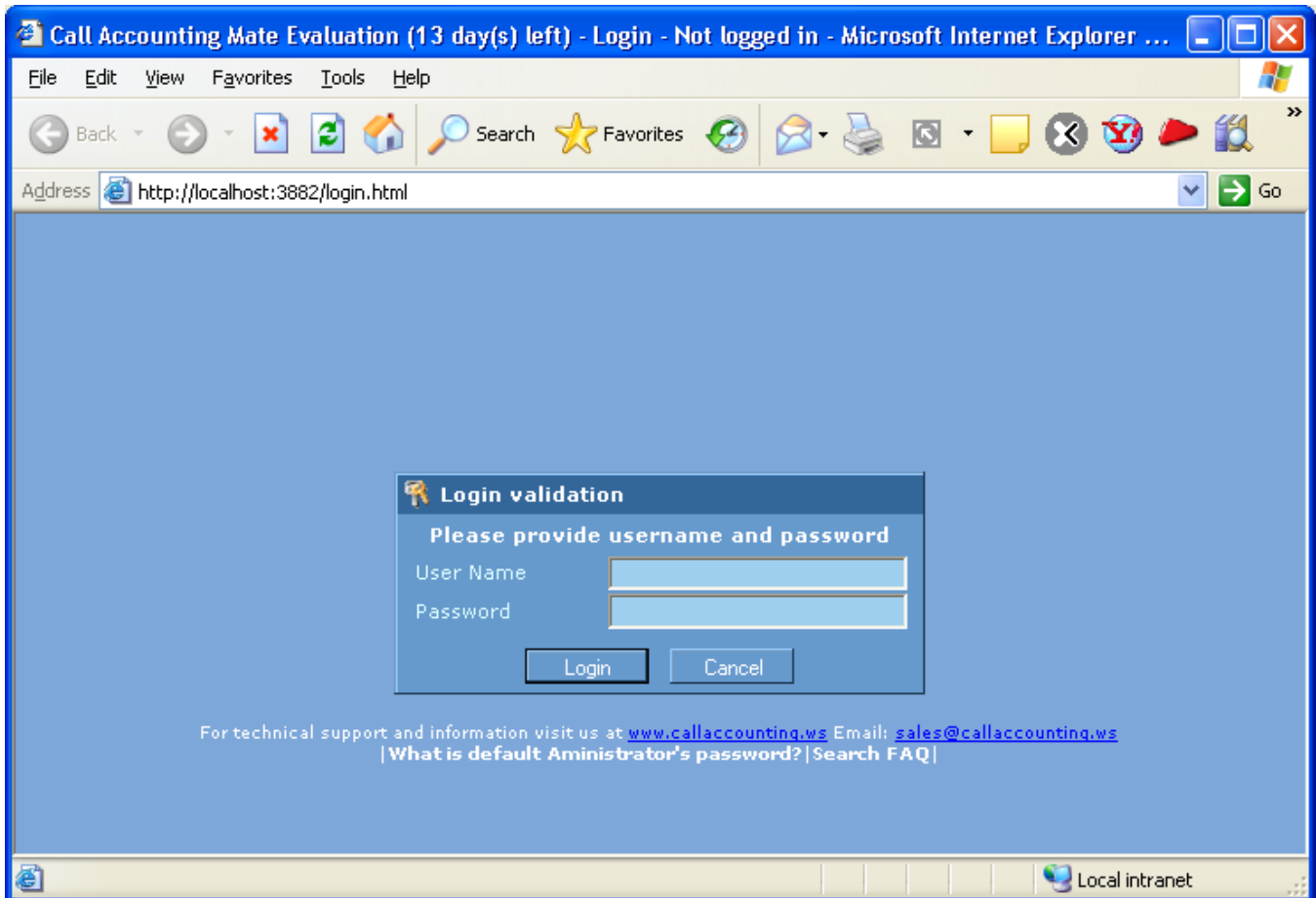

Enter a valid **User Name** and **Password** into the corresponding boxes and press the **Login** button. If this is your first time logging in please use the following user name and password.

User Name:	administrator
Password:	null

* Please note, for security reasons we strongly recommend changing the password of the administrator account. Consult the software's on-line documentation for details on how to change the password.

After successfully logging into the CAM software its main window should be visible within your browser.
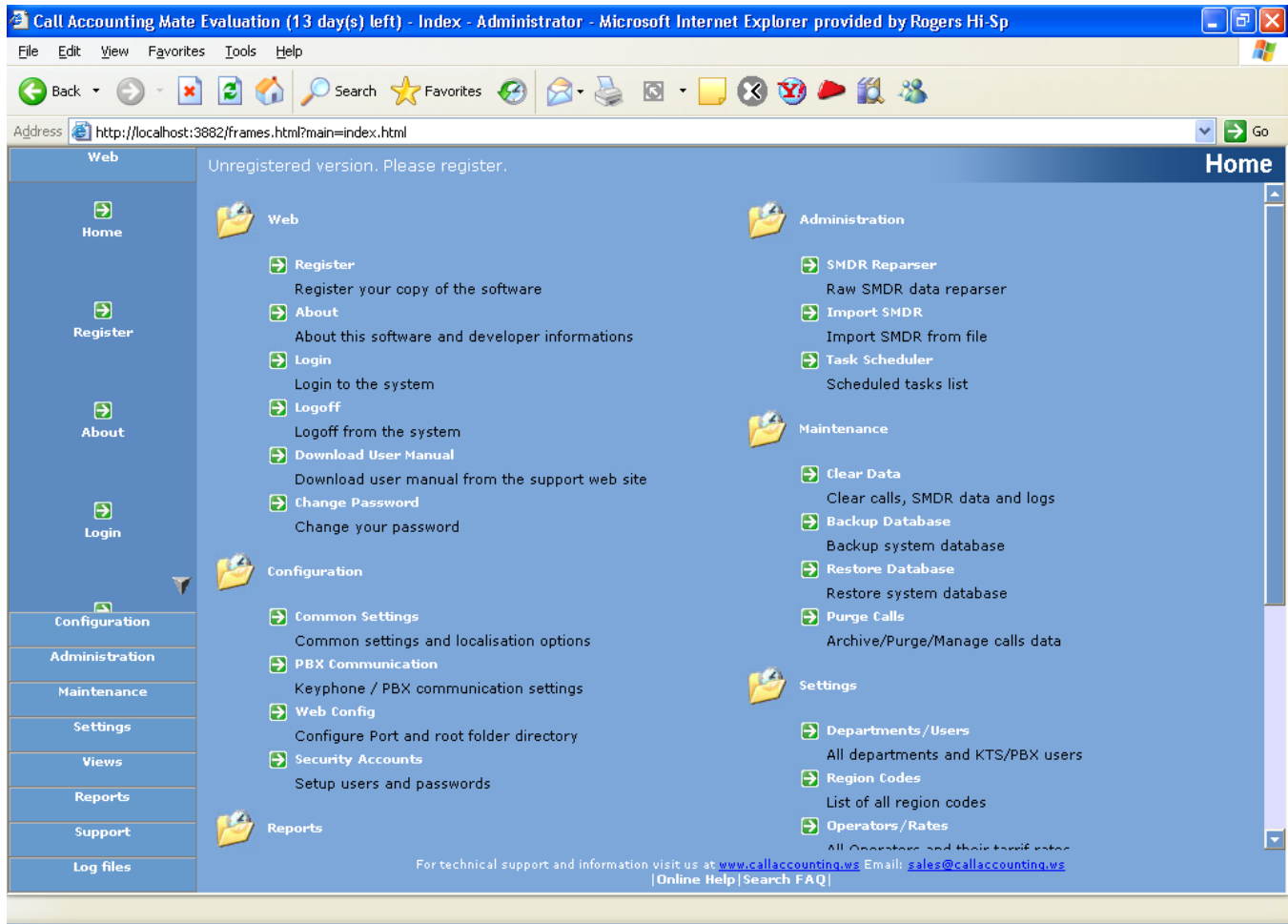
The main software window contains two distinct sections. An outlook style menu bar located on the left hand side of the screen and a full menu system located to the right of the outlook style menu bar. Simply click on the appropriate menu item to access the software's configuration, reporting and utility functions.

Note: CAM is completely browser based. When not in use, the application will continue to run in the host system tray. All call records will continue to be logged and processed.
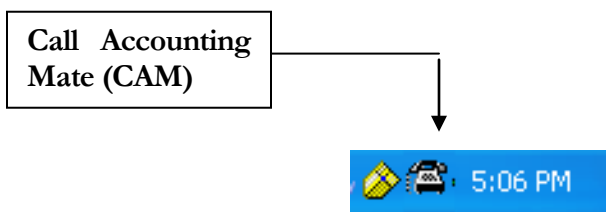
You can re-launch the CAM software by simply double clicking the CAM icon in the system tray.

You are now ready to configure your software.

4.2 Configuring your Software

The CAM software requires minimal configuration before it can collect CDR data. The configuration process involves identifying the type of telephone system (i.e. Nortel Norstar/BCM, Avaya IP Office, Cisco Call Manager, etc) your organization is utilizing and the type of connection utilized (i.e. serial, IP, ODBC, etc.) to retrieve its CDR/SMDR data. Use the following steps to configure the CAM software.

1. Launch and log into the CAM software using an account with administrator privileges (i.e. user name administrator, password null).

2. Click the **Configuration** tool bar menu (left hand side of screen) and then click the **PBX Communication** icon. The communications settings **Common** tab should now be visible.
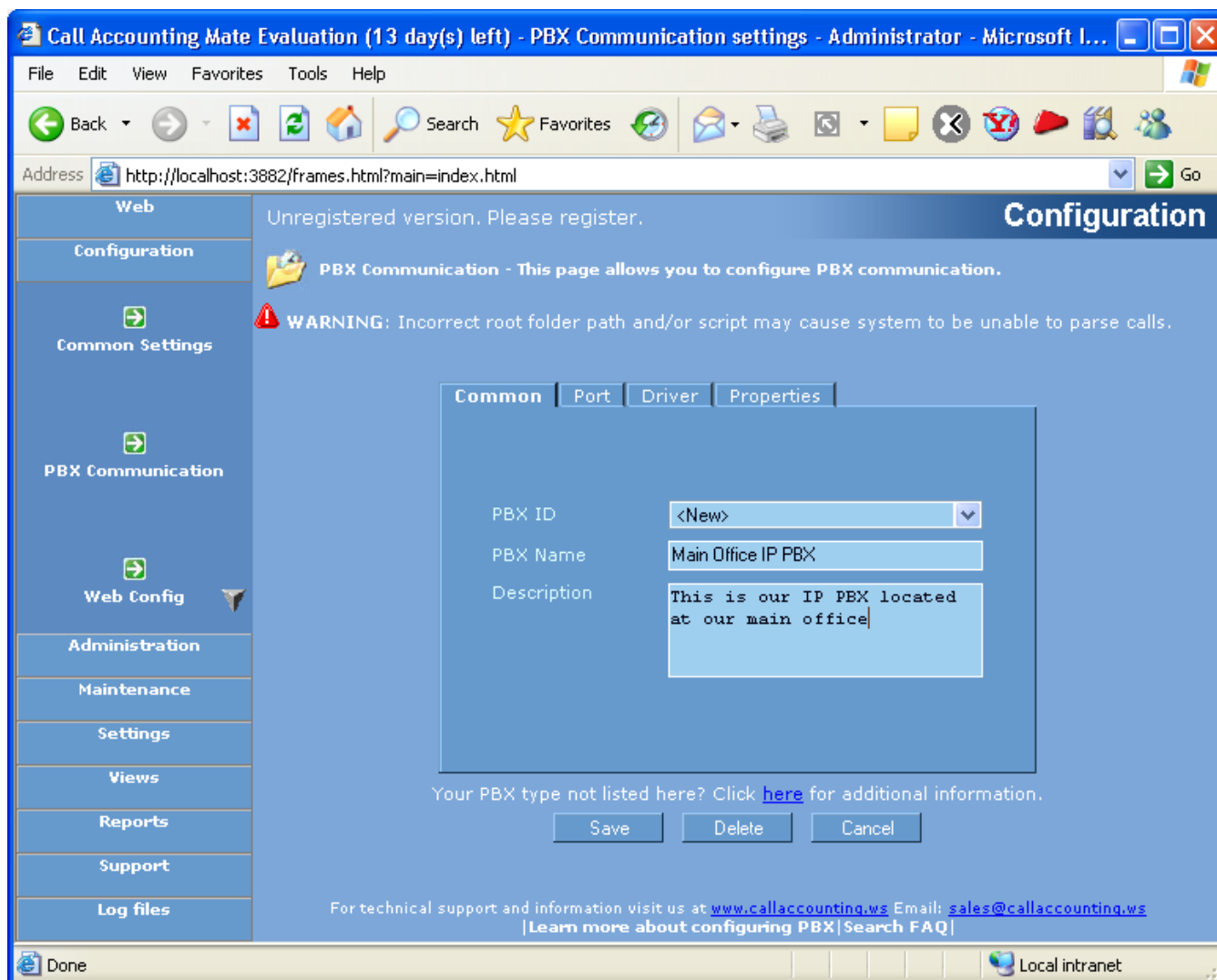
Set the **PBX ID** to <New> and type a **PBX Name** and **Description** of your telephone system into the spaces provided.

3. Next, click the **Port** tab to configure the communications settings utilized by the software to retrieve the CDR/SMDR data from your telephone system. CAM supports connection to both

traditional and IP based telephone systems. The following screen depicts CAM Call Accounting configured to link to a traditional telephone system via a serial (RS-232) connection.

CAM also supports connection to today's IP-based telephone systems utilizing UDP, TCP, Telnet, ODBC, My-SQL, etc. The following depicts a TCP connection to an IP based telephone system via Port 9000.

4. Next, click the Drivers tab and select your telephone system from the PBX driver drop down list.

Review the driver description box to verify you have selected the right driver. If a driver for your telephone system is not available then you will need to capture some sample data and submit it to support@callaccounting.ws.

Here is how:

a. Select the generic PBX Driver called "**Data Collection Driver**".

b. Make sure all your connectivity settings are correct.
c. Make some telephone calls. A good sample is about 15 to 20 calls.

d. Verify that calls are being collected by your software. This can be accomplished by selecting the "Views" tab and selecting "Live".   Click on "Raw".   This will list all calls that are being retrieved by your system.

e. Submit your request for a new driver.   This can be done within the software by selecting the Support tab and clicking on "**Send Log Files**".


f. A request will be sent to callaccounting.ws support.   We will create a new driver and email instructions on how to retrieve the file.

Additional information is available on our website at
www.callaccounting.ws/call_accounting_pbxnotlisted.htm.

Another detailed example is available here:
http://www.callaccounting.ws/howto/How to make request for driver.mht

The call duration reported in a CDR record for outbound calls includes dialing time and the time to answer (i.e. ring time). Telephone systems equipped with answer detection (i.e. recognizes when the person you call answers the phone) automatically reduce the call duration by dialing and answer time. If your telephone system is not equipped with answer supervision then use the **Duration correction (sec.)** box to reduce the duration of outbound calls by x seconds. A typical value for these environments is from 15 to 30 seconds.

5. Finally, click the **Properties** tab and set any of the additional configuration options as required.
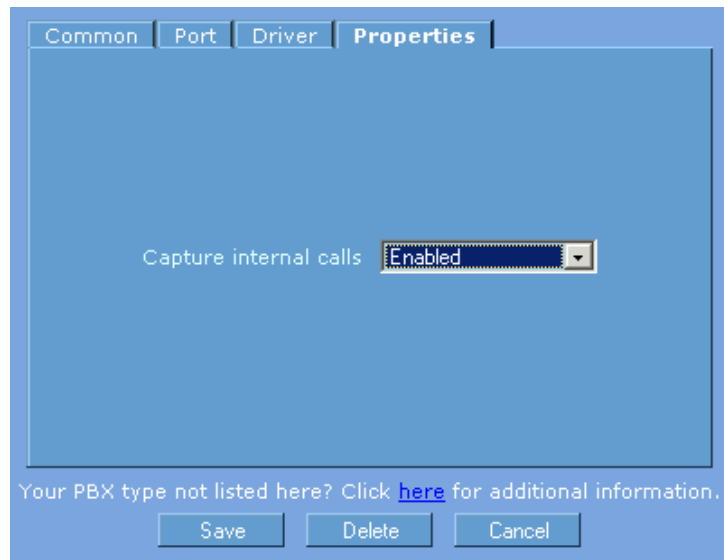
Please note the properties screen may appear with no visible options.

6. Press the **Save** button to store your configuration settings. You have now successfully configured CAM for integration with your telephone system. The CAM software is now ready to receive SMDR/CDR data.

You have now successfully configured CAM communications settings.

4.3 Configuring Your Software to Retrieve Data Via ODBC from Asterisk

There are many communication servers and telephone systems that take advantage of DBMS databases to store call detail records (CDR). The database structure allows them to retain a virtually unlimited buffer of call data. Often it is necessary to establish connectivity between CAM and the communication server using ODBC. The following example will assume that we are connecting to **Asterisk** which has a MySQL DBMS database structure.

Before you begin:
Verify that you have MySQL ODBC 3.51 Driver installed in your operating system. Typically, you can determine this by finding your ODBC connections in your Control Panel Administrative Tools.

> If you do not have a MySQL ODBC 3.51 Driver, you will need to download a free copy from their website. The link is www.mysql.com. Proceed to the download section and install the driver.

1. Click the **Configuration** tool bar menu (left hand side of screen) and then click the **PBX Communication** icon. The communications settings **Common** tab should now be visible.

Set the **PBX ID** to <New> and type a **PBX Name** and **Description** of your telephone system into the spaces provided.

.
2. Next, click the **Port** tab to configure the communications settings utilized by the software to retrieve the CDR/SMDR data from your telephone system. CAM supports connection to both traditional and IP based telephone systems. Select Port type – Asterisk-MySQL. You will need to configure a few basic settings. A sample follows below:

Please consult your system administrator to determine authentication values.

3. Next, click the Drivers tab and select your telephone system from the PBX driver drop down list.

Note: Drivers for Asterisk may need to be customized for your implementation. Data from Asterisk differs for SIP, H323 and user-defined parameters.   The drivers available from CAM are generic and may need customization for the needs of the user.   Please contact us at support@callaccounting.ws to modify your driver.

>> Follow all other instructions starting at step 4 in 4.0 Configuring Your Software

4.4 Identifying Your Region

The CAM software can be deployed in any country. The software contains dialing plan information for most countries in its Regions database. View the countries currently defined in the software by selecting the **Regions** icon from the **Settings** menu item. An example of the Regions database is pictured below.

View additional countries by clicking the page 1, 2, 3, 4 or 5 numbers located on the bottom of this screen or by pressing the **Next>** button located in the bottom right corner. Examine the available dialing plan/sub region information for a country by clicking the leftmost plus sign (+) associated with the desired country.

The CAM software must be configured with your region information. Use the CAM software **Rates** tool to identify the region where the telephone system it is connected to is located. Access the **Rates** tool by selecting the Rates icon from the **Settings** menu. The following screen should now be visible.
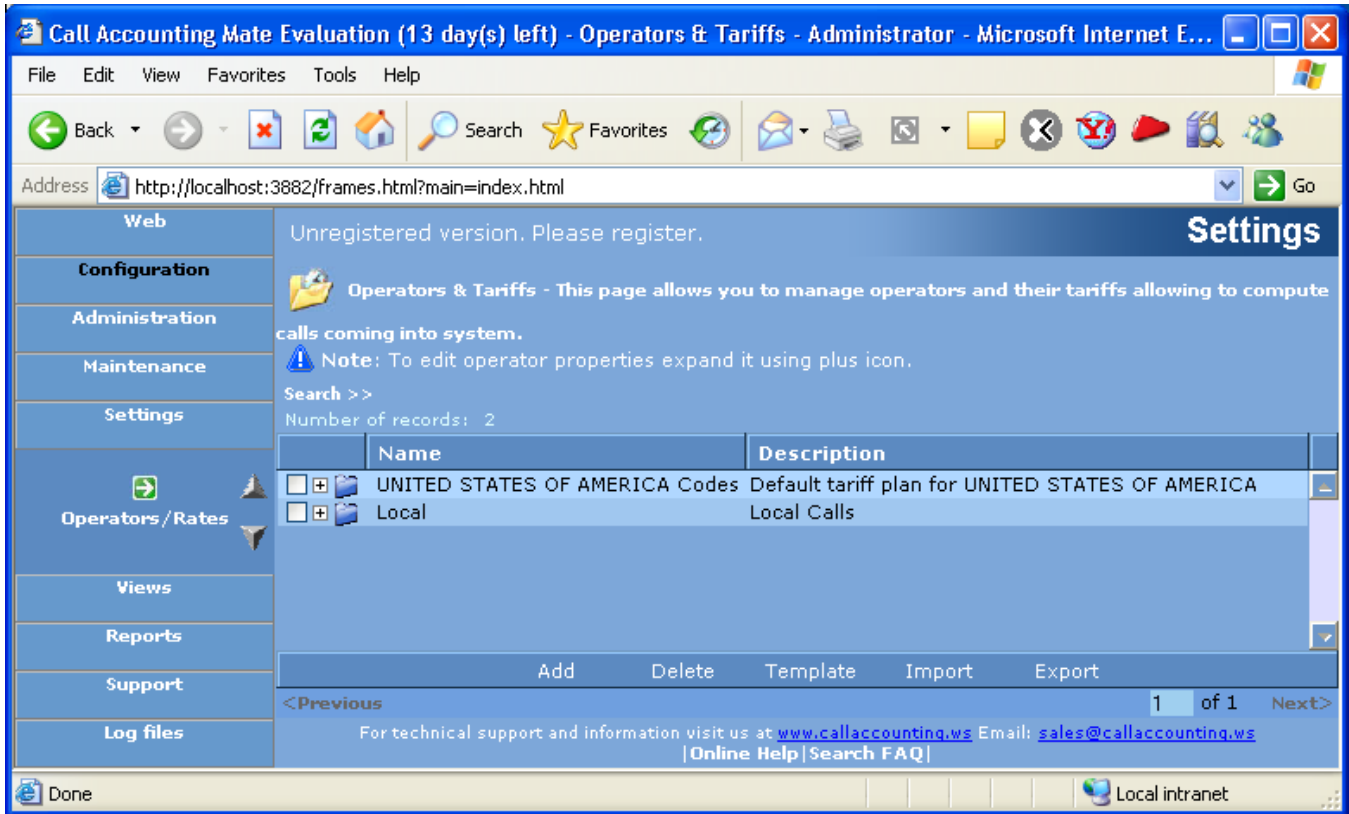
By default the CAM software assumes your telephone system is located in the United States. If this is correct then your configuration is complete (please skip ahead to section Using Call Accounting Mate). Use the following steps to select a different region.

1. Press the **Template** item located on the bottom of the screen. The Default Tariff Plan Wizard dialog should now be visible.

   Click the **Country** drop down list to select the country where your telephone system is located. Next, set the Create Mode option to **Replace Existing Plan**.

2. Press the OK button. The United States region information will be replaced with the newly selected country (i.e. United Kingdom).
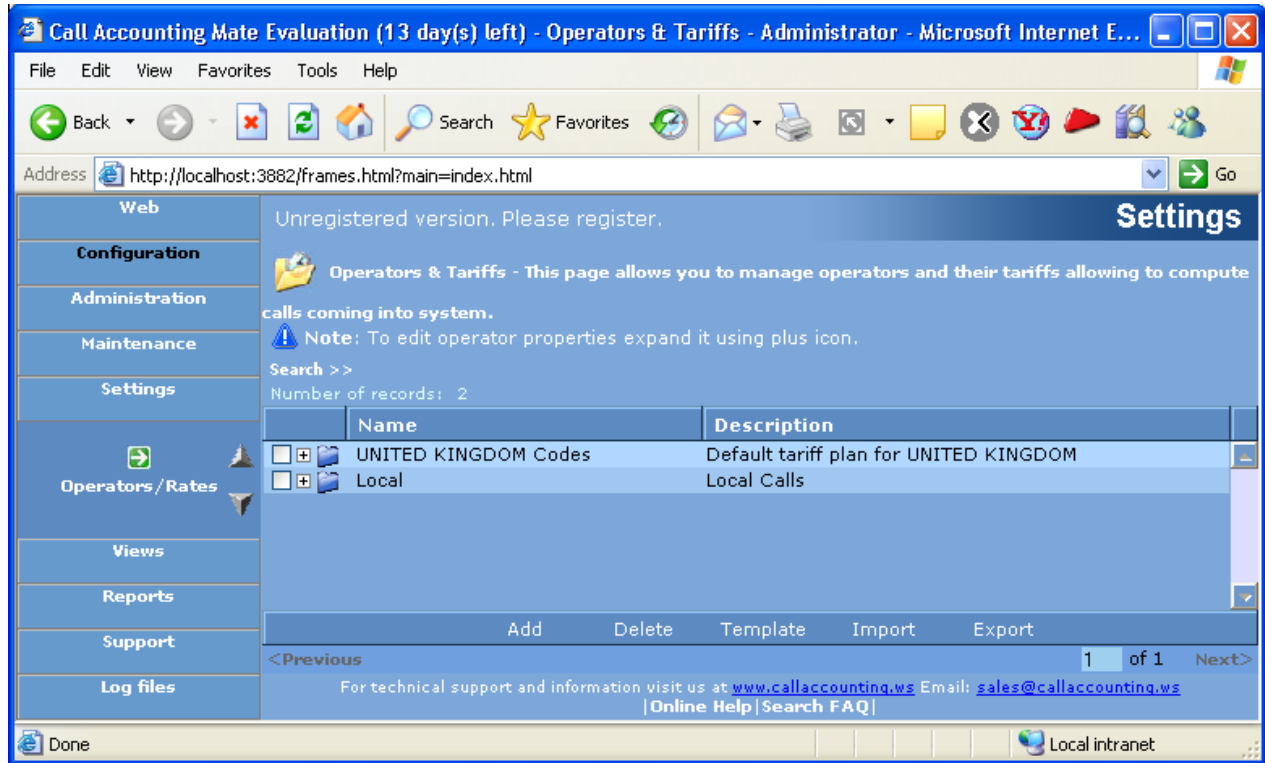
3. The software is now configured for deployment in the selected country (i.e. United Kingdom).

Please note the Rates screen shown above can also be configured to price your telephone calls (by default all pricing is disabled - i.e. calls will not be priced). Access and add pricing information by clicking the plus sign (+) located to the left of the country name. For more details on how to configure pricing please consult either the Using CAM to Price Telephone Calls section of this guide or the software's on-line help.

You are now ready to start using the CAM software.

5.0 Using CAM to Price Telephone Calls

The CAM software can be deployed in any country in the world. The software supports any numbering plan and can price calls for both North American and International deployments. Use CAM's dynamic **Rates** tool to configure the software to price your calls. Access the **Rates** tool by selecting the Rates icon from the **Settings** menu. The following screen should now be visible.
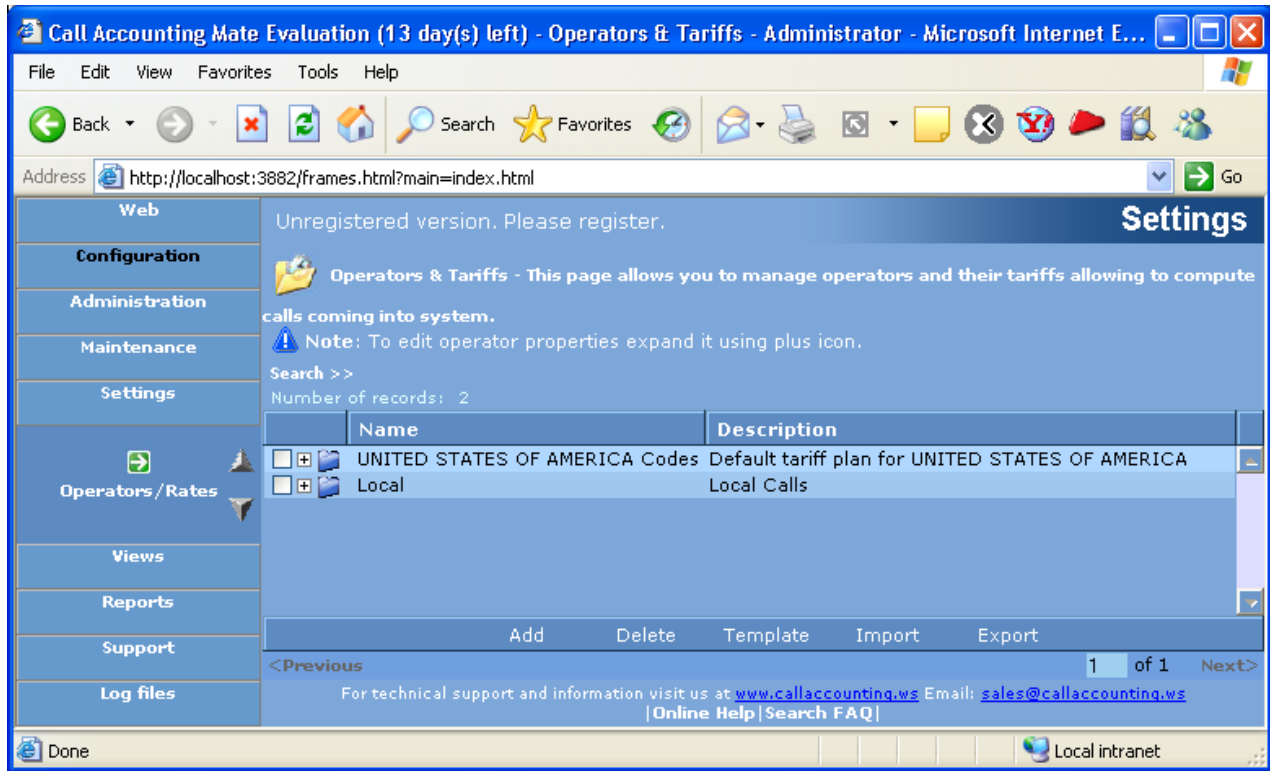
Use the above screen identity the region where you are located. By default the CAM software assumes your telephone system is located in the United States. Numbering plans can vary from country to country. Two distinct numbering plans are utilized in most countries of the world. They are as follows:

- **North American Numbering Plan (NANP)** – utilized by Canada, US and Caribbean countries. Long distance calls within or between these countries are placed by dialling a 1 + telephone number. Long distance calls to regions outside of these countries are placed by dialling 011+Country Code + City Code + Telephone Number. Local calls are made by dialling the telephone number only.

- **International Numbering Plans** – utilized by all international countries except Canada, US and Caribbean countries. Long distance calls within a country are placed by dialling 0 + City Code +Telephone number. Long distance calls to another country are placed by dialling 00 + Country Code + City Code + Telephone number. Local calls are made by dialling the telephone number only.

Follow the steps in either the Pricing Calls from NANP Countries or Pricing Call from International Numbering Plan Countries section of this guide to configure CAM to price your telephone calls.

5.1 Pricing Calls from NANP Countries

The North American Numbering Plan is applicable to Canada, the United States of America (USA) and Caribbean countries. If your software is being deployed in any other country then refer to the Pricing Calls from International Numbering Plan Countries section of this guide.

Use the following steps to price the telephone call records captured by your CAM software.

1. Access the **Rates** tool by selecting the Rates icon from the **Settings** menu. The following screen should now be visible.
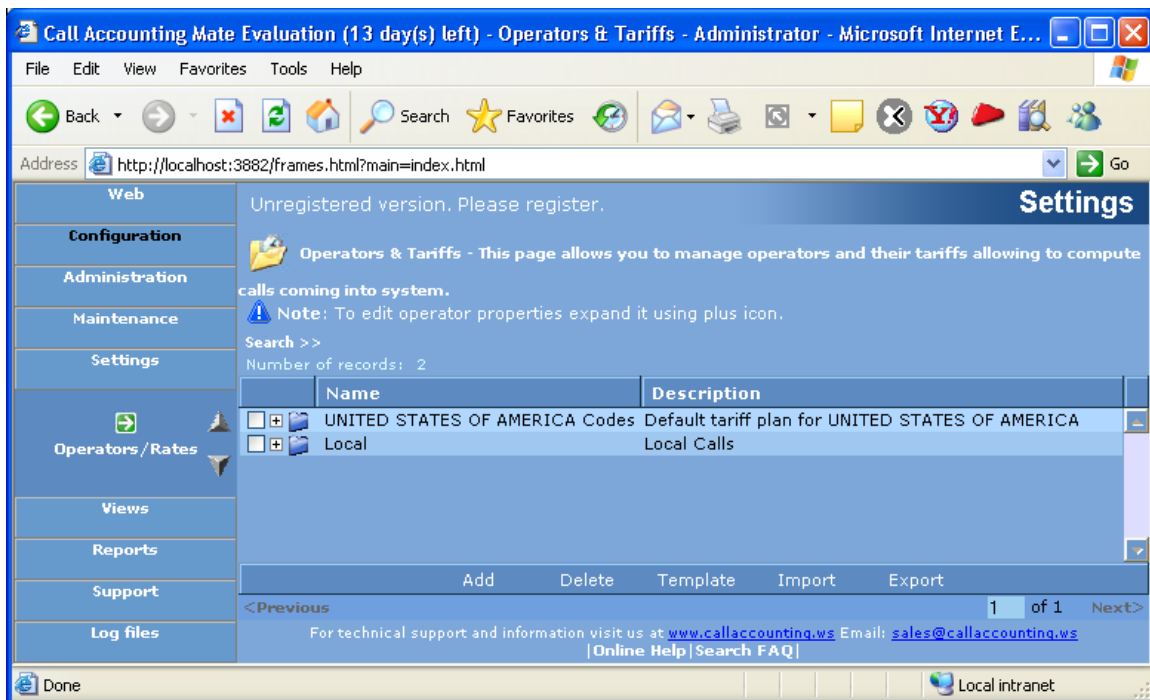

By default the CAM software assumes your telephone system is located in the United States. If your software is located in the United States and the CAM rates configuration screen resembles the above then skip ahead to step 5

2. Press the **Template** item located on the bottom of the screen. The **Default Tariff Plan Wizard** dialog should now be visible.

Click the **Country** drop down list to select the country where your telephone system is located. For example, if your telephone system is located in Canada select Canada, if your software is located in Bermuda then select Bermuda.

3. After selecting the country where your software is located change the **Create Mode** option to **Replace Existing Plan**. For example if your software is located in Canada then the screen should look as follows.
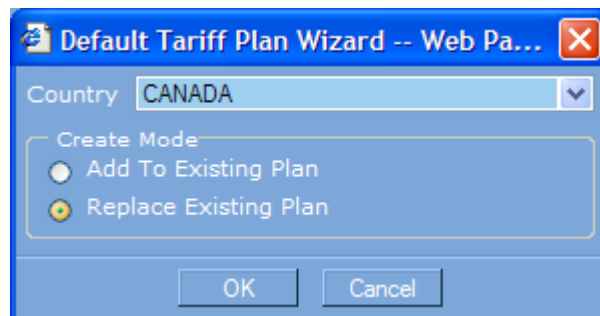
4. Press the OK button. The United States region information will be replaced with the newly selected country (i.e. Canada).

5. Next, to configure your rates based on the NANP click the (+) sign to the left of the country name where your software is deployed. Note: The following steps assume the software is deployed in the Canada. The steps are the same regardless of where the software is located (i.e. USA or Caribbean).
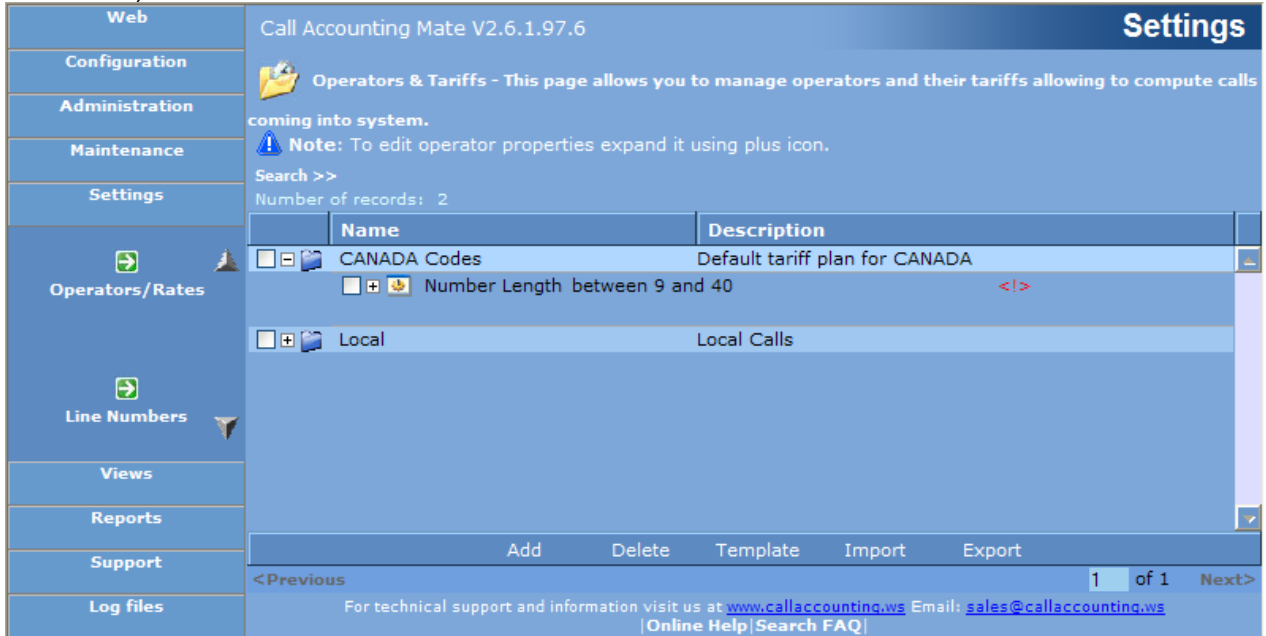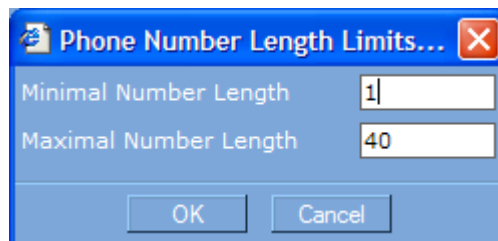

The option **Number Length between 9 and 40** should now be visible below the (+) sign you clicked in the previous step. Additionally the (+) sign will have changed to a (-) sign. Clicking the (-) sign will change it back to a (+) sign and hide the new option.

6. Click the text **Number Length**. This will allow you to edit this item. Now click the blue button to the right of the text **between 9 and 40**. The **Phone Number Length Limits** dialog box should now be visible on your screen.

Change the **Minimum Number Length** value from 9 to 1.

Press the **OK** button. The rates window should now show your changes. An example of this window is pictured below.

Press the **Save** button to record your changes. The Rates screen should now resemble the following.

7. Click and expand (+) sign located to the left of the **Number Length between 1 and 40** item.

Two new options, **Access Code 011*** and **Number/Prefix 1*** should now be visible on your screen. If your software is deployed in the United States of America then you may see an additional line containing the text **Number Prefix** * between the **Access Code 011*** line and the **Number Prefix 1*** line. If this line is visible check the empty box to the left of its plus sign to mark it for deletion. Next, position the mouse below the **Number Prefix** * text and when the **Delete** button appears press it. The **Number Prefix** * line should disappear.

8. Click on the text **Number/Prefix 1***. You should now be able to edit this line. Click the drop down box containing the **Number/Prefix** text and change this option to **Access Code**. The box to the right of the Access Code text should contain an asterisk (*). If it doesn't, change this box to an asterisk (*). An example of this window is pictured below.

Press the **Save** button to record your changes. The Rates screen should now resemble the following.

9. Click and expand (+) sign located to the left of the **Access Code** * item you modified in step 8. The following should now be visible on your screen.

Click on the text **Expand**. You should now be able to edit this line. Click the drop down box containing the Expand text and change this option to **Number Prefix**. The box to the right of the Number Prefix text should contain an asterisk (*). If it doesn't, change this box to an asterisk (*). Press the **Save** button to record your changes. Your rates screen should now resemble the following.

10. Position your mouse pointer below the **Number Prefix *** line you just modified in Step 9. A new line displaying an **Add** and **Delete** button should now be visible.

Press the **Add** button. A new line should now appear either below or over the existing **Number Prefix *** line. Select the **Number Prefix** option from the drop down list. Type the text **1*** into the box to the right of the Number Prefix text and then press the **Save** button. A new line containing the text **Number Prefix 1*** should now be visible.

11. Click and expand the (+) sign located to the left of the text **Number/Prefix *** that you created in step 9. The following should now be visible on your screen

Position your mouse over the blue bar below the **Property Value** header. An **Add** and **Delete** button should now be visible. Press the **Add** button. A new line should now appear. Select the **Set Region** option from the drop down list. The box to the right of the set region text should contain *<Click [...] button to invoke property editor>*. Press the blue button containing three dots (located to the right of the Property Value text) to display the **Select Region(s) -- Web Page Dialog** window.

Select the region name where your software is deployed (i.e. the same region name you selected in step 3) and then press the **OK** button. Now press the **Save** button to record your changes. A new line containing the text **Set region** should now be visible

You have now configured your CAM software to recognize the North American Numbering Plan. Please consult the following sections to add local, long distance and international rates to your North American Numbering Plan.

5.1.1 Adding Local Rates

The CAM software can be configured to add call pricing to local calls for deployments utilizing the North American Numbering Plan (NANP). Local calls within countries utilizing the NANP are either 7 or 10 digits in length and begin with the number 2 through 9. Please note, prior to implementing local call pricing you must configure the CAM software to utilize the NANP (see Pricing Calls from NANP Countries). Use the following steps to configure CAM with local call pricing.

1. Access the CAM **Rates** tool by selecting the Rates icon from the **Settings** menu. Click the (+) sign located to the left of the country name identifying the region/country where your software is installed (i.e. for US installations the (+) sign is to the left of the text 'UNITED STATES OF AMERICA Codes', for Canadian installations the (+) sign is to the left of the text 'CANADA Codes'). Please note, if your country name is not visible on this screen then you must re-configure your software to support your country (see Pricing Calls from NANP Countries)

2. Next, click and expand the (+) sign located to the left of the text **Number Length between 1 and 40 digits**. Now click and expand the (+) sign located to the left of the text **Access Code ***. Next, click and expand the (+) sign located to the left of the text **Number Prefix ***. Finally, click and expand the (+) sign located to the left of the text **Set Region – <country name>**. The following should now be visible on your screen.

3. If you would like to add unique rates for specific phone numbers (i.e. area code + exchange) then skip ahead to step 4 otherwise to apply the same rate to all local calls press the **Add** button located below the text **Property Value**. A new blank line should appear below the Property/Property Value headers. Use the drop down list to set the Property to **Rate**. The text *'<Click [...] button to invoke property editor>*' should now be contained in the **Property Value** box. Press the blue button containing three dots (located to the right of the property value text) to display the **Tariff Properties Web Page Dialog** window.

Check the **Plain rate/Connection fee** option to assign a flat rate to your local calls. A flat rate assigns the same price to all calls regardless of their duration (i.e. a 1 minute call costs the same as a 30 minute call). The following screen depicts how to apply a 0.25 flat charge to all local calls.

Uncheck the **Plain rate/Connection fee** option to assign a variable rate to your local calls. A variable rate assigns a cost to a call based on its duration. The longer the call the more it costs (i.e. a 1 minute call costs less than a 30 minute call). The following screen depicts how to apply a charge of 0.05/minute to all local calls.

Use the **Interval Start (sec.)** option to identify when to start applying charges to a local call. For example if this option is set to 30 then the first 30 seconds of the call will be free (i.e. call billing starts at the 31st second). Setting this value to zero causes the call to be billed for its entire duration. Usually this option is set to zero.

Use the **Tariffing Interval (sec.)** option to specify the billing increment. For example if this option is set to 60 then the cost of the call will increase by the amount in the **Tariff** option every 60 seconds.

Press the **OK** button and then the **Save** button to activate your local call charges. The CAM rates configuration screen should now resemble the following.

You have now successfully configured CAM to apply costs to your local calls. All local calls will be billed using the rate specified above. If you would like to configure unique rates to local calls based on phone number then please see Step 4.

4. This step describes how to apply unique local call rates based on the number dialled. If you would like to apply the same rate to all local calls then please return to step 3.

   To add a unique rate for a specific phone number (i.e. local area code and exchange) position your cursor below the **Set Region** code option (and the **Rate** you created in step 3). An **Add** and **Delete** button should now be visible below the Set Region item (pictured below).

Press the **Add** button. A new line should appear below the **Set region** text. Click the drop down box and change its value to **Number/Prefix**. Click the text box located to the right of the drop down box and change its value from an asterisk (*) to the local telephone number you would like to apply a unique rate to followed by an asterisk(*). For example if you would like to apply a rate of 0.07/minute to all local calls beginning with area code / exchange 212/740 then type 212740* into this box. Press the **Save** button to store your changes. Your screen should now resemble the following.
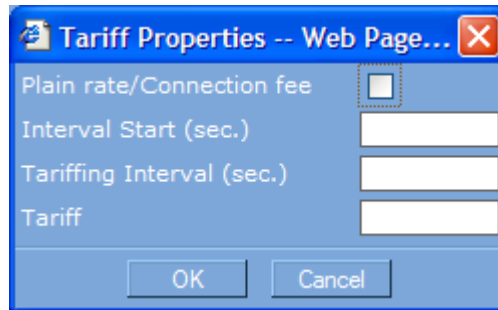
Please note, if local calling in your area utilizes seven digit dialling then you may have to remove the area code (i.e. 212) from the Number/Prefix information.

Next, click the (+) sign located to the left of the **Number/Prefix** option you just added (i.e. Number/Prefix 212740). A new line should appear below this option. Position your mouse over the blue bar below the Property Value option to reveal **Add** and **Delete** buttons.

Press the **Add** button located below the text **Property Value**. A new blank line should appear below the Property/Property Value headers. Use the drop down list to set the Property value to

Rate. The text *<Click [...] button to invoke property editor>* should now be contained in the **Property Value** box. Press the blue button containing three dots (located to the right of the property value text) to display the **Tariff Properties Web Page Dialog** window.
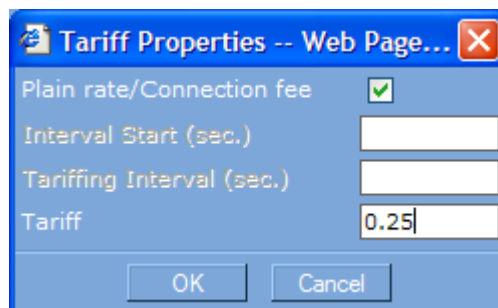
Check the **Plain rate/Connection fee** option to assign a flat rate to these local calls. A flat rate assigns the same price to calls regardless of their duration (i.e. a 1 minute call costs the same as a 30 minute call). The following screen depicts how to apply a 0.23 flat charge to all local calls beginning with the telephone number you specified above (i.e. 212740).

Uncheck the **Plain rate/Connection fee** option to assign a variable rate to all local calls beginning with the telephone number you specified above (i.e. 212740). A variable rate assigns a cost to a call based on its duration. The longer the call the more it costs (i.e. a 1 minute call costs less than a 30 minute call). The following screen depicts how to apply a charge of 0.07/minute to all local calls beginning with the number you specified above (i.e. 212740).

Use the **Interval Start (sec.)** option to identify when to start applying charges to a local call. For example if this option is set to 30 then the first 30 seconds of the call will be free (i.e. call billing starts at the 31st second). Setting this value to zero causes the call to be billed for its entire duration. Usually this option is set to zero.

Use the **Tariffing Interval (sec.)** option to specify the billing increment. For example if this option is set to 60 then the cost of the call will increase by the amount in the **Tariff** option every 60 seconds.

Press the **OK** button and then the **Save** button to activate your local call charges. The CAM rates configuration screen should now resemble the following.

You have now successfully added a unique local rate to a specific phone number (i.e. 212740). Repeat this step for each unique rate you would like to apply to a local telephone number.

5.1.2 Adding Long Distance Rates

The CAM software can be configured to add call pricing to long distance calls (i.e. 1+ calls to Canada, US and Caribbean) for deployments utilizing the North American Numbering Plan (NANP). Long distance calls originating from countries utilizing the NANP begin with the number 1. Please note, prior to implementing long distance call pricing you must configure the CAM software to utilize the NANP (see Pricing Calls from NANP Countries). Use the following steps to configure CAM with Long Distance Call Pricing.

1. Access the CAM **Rates** tool by selecting the Rates icon from the **Settings** menu. Click the (+) sign located to the left of the country name identifying the region/country where your software is installed (i.e. for US installations the (+) sign is to the left of the text 'UNITED STATES OF AMERICA Codes', for Canadian installations the (+) sign is to the left of the text 'CANADA Codes'). Please note, if your country name is not visible on this screen then you must re-configure your software to support your country (see Pricing Calls from NANP Countries)

2. Next, click and expand the (+) sign located to the left of the text **Number Length between 1 and 40 digits**. Now click and expand the (+) sign located to the left of the text **Access Code ***. Next, click and expand the (+) sign located to the left of the text **Number Prefix 1***. The following should now be visible on your screen

3. If you would like to add unique rates for specific area codes or phone numbers then skip ahead to step 4 otherwise to apply the same rate to all long distance calls press the **Add** button located below the text **Property Value**. A new blank line should appear below the Property/Property Value headers. Use the drop down list to set the Property value to **Rate**. The text *<Click [...] button to invoke property editor>* should now be contained in the **Property Value** box. Press the blue button containing three dots (located to the right of the property value text) to display the **Tariff Properties Web Page Dialog** window.

Check the **Plain rate/Connection fee** option to assign a flat rate to your long distance calls. A flat rate assigns the same price to all calls regardless of their duration (i.e. a 1 minute call costs the same as a 30 minute call). The following screen depicts how to apply a 0.49 flat charge to all long distance calls.

Uncheck the **Plain rate/Connection fee** option to assign a variable rate to your long distance calls. A variable rate assigns a cost to a long distance calls based on its duration. The longer the call the more it costs (i.e. a 1 minute call costs less than a 30 minute call). The following screen depicts how to apply a charge of 0.09/minute to all long distance calls.

Use the **Interval Start (sec.)** option to identify when to start applying charges to a long distance call. For example if this option is set to 30 then the first 30 seconds of the call will be free (i.e. call billing starts at the 31st second). Setting this value to zero causes the call to be billed for its entire duration. Usually this option is set to zero.

Use the **Tariffing Interval (sec.)** option to specify the billing increment. For example if this option is set to 60 then the cost of the call will increase by the amount in the **Tariff** option every 60 seconds.

Press the **OK** button and then the **Save** button to activate your long distance call charges. The CAM rates configuration screen should now resemble the following.

You have now successfully configured CAM to apply costs to your long distance calls. All long distance calls will be billed using the rate specified above. If you would like to configure unique rates to long distance calls based on phone number then please see Step 4.

4. This step describes how to apply unique long distance call rates based on the number dialled. If you would like to apply the same rate to all long distance calls then please return to step 3.

    To add a unique rate for a specific phone number (i.e. area code) position your cursor below the **Number Prefix 1*** option (and the **Rate** you created in step 3). An **Add** and **Delete** button should now be visible below the **Number Prefix 1*** item (pictured below).

Press the **Add** button. A new line should appear below the **Number Prefix 1*** text. Click the drop down box and change its value to **Number/Prefix**. Click the text box located to the right of the drop down box and change its value from an asterisk (*) to the telephone number (i.e. area code) you would like to apply a unique rate to followed by an asterisk(*). For example if you would like to apply a rate of 0.11/minute to all long distance calls beginning to area code 313 then type 313* into this box. Press the Save button to record your changes. Your screen should now resemble the following.

Please note, if long distance calling in your area utilizes seven digit dialling then you may have to replace the area code (i.e. 313) you entered in the Number/Prefix box with the exchange.
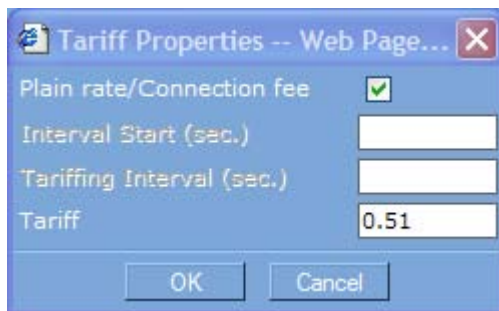
Next, click the (+) sign located to the left of the **Number/Prefix** option you just added (i.e. Number/Prefix 313). A new line should appear below this option. Position your mouse over the blue bar below the **Property Value** option to reveal **Add** and **Delete** buttons.

Press the **Add** button located below the text '**Property Value'**. A new blank line should appear below the Property/Property Value headers. Use the drop down list to set the Property value to **Rate**. The text *<Click [...] button to invoke property editor>* should now be contained in the **Property Value** box. Press the blue button containing three dots (located to the right of the property value text) to display the **Tariff Properties Web Page Dialog** window.

Check the **Plain rate/Connection fee** option to assign a flat rate to all long distance calls to area code 313. A flat rate assigns the same price to all calls regardless of their duration (i.e. a 1 minute call costs the same as a 30 minute call). The following screen depicts how to apply a 0.51 flat charge to all long distance calls beginning with the telephone number you specified above (i.e. area code 313).
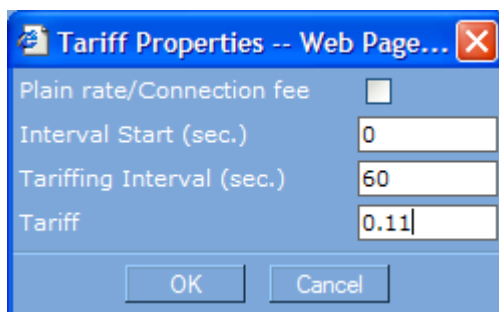
Uncheck the **Plain rate/Connection fee** option to assign a variable rate to all long distance calls beginning with the telephone number you specified above (i.e. area code 313). A variable rate assigns a cost to a call based on its duration. The longer the call the more it costs (i.e. a 1 minute call costs less than a 30 minute call). The following screen depicts how to apply a charge of 0.11/minute to all long distance calls beginning with the number you specified above (i.e. area code 313).

Use the **Interval Start (sec.)** option to identify when to start applying charges to a long distance call. For example if this option is set to 30 then the first 30 seconds of the call will be free (i.e. call billing starts at the 31st second). Setting this value to zero causes the call to be billed for its entire duration. Usually this option is set to zero.

Use the **Tariffing Interval (sec.)** option to specify the billing increment. For example if this option is set to 60 then the cost of the call will increase by the amount in the **Tariff** option every 60 seconds.

Press the **OK** button and then the **Save** button to activate your long distance call charges. The CAM rates configuration screen should now resemble the following.

You have now successfully added a unique long distance rate to a specific phone number (i.e. area code 313). Repeat this step for each unique rate you would like to apply to a different long distance telephone number or area code.

5.1.3 Adding International Rates

The CAM software can be configured to add call pricing to international calls (i.e. 011+ calls UK, France, China, Australia, etc.) for deployments utilizing the North American Numbering Plan (NANP). International calls originating from countries utilizing the NANP begin with the number 011. Please note, prior to implementing international call pricing you must configure the CAM software to utilize the NANP (see Pricing Calls from NANP Countries). Use the following steps to configure CAM with International Call Pricing.

1. Access the CAM **Rates** tool by selecting the Rates icon from the **Settings** menu. Click the (+) sign located to the left of the country name identifying the region/country where your software is installed (i.e. for US installations the (+) sign is to the left of the text 'UNITED STATES OF AMERICA Codes', for Canadian installations the (+) sign is to the left of the text 'CANADA Codes'). Please note, if your country name is not visible on this screen then you must re-configure your software to support your country (see Pricing Calls from NANP Countries)

2. Next, click and expand the (+) sign located to the left of the text **Number Length between 1 and 40 digits**. Now click and expand the (+) sign located to the left of the text **Access Code 011***. The following should now be visible on your screen

3. If you would like to add unique rates for specific countries or phone numbers then skip ahead to step 4 otherwise to apply the same rate to all international calls press the **Add** button located below the text **Property Value**. A new blank line should appear below the Property/Property Value headers. Use the drop down list to set the Property value to **Rate**. The text *<Click [...] button to invoke property editor>* should now be contained in the **Property Value** box. Press the blue button containing three dots (located to the right of the property value text) to display the **Tariff Properties Web Page Dialog** window.

Check the **Plain rate/Connection fee** option to assign a flat rate to your international calls. A flat rate assigns the same price to all international calls regardless of their duration (i.e. a 1 minute call costs the same as a 30 minute call). The following screen depicts how to apply a 1.42 flat charge to all international calls.

Uncheck the **Plain rate/Connection fee** option to assign a variable rate to your international calls. A variable rate assigns a cost to a call based on its duration. The longer the call the more it costs (i.e. a 1 minute call costs less than a 30 minute call). The following screen depicts how to apply a charge of 0.79/minute to all international calls.

Use the **Interval Start (sec.)** option to identify when to start applying charges to an international call. For example if this option is set to 30 then the first 30 seconds of the call will be free (i.e. call billing starts at the 31st second). Setting this value to zero causes the call to be billed for its entire duration. Usually this option is set to zero.

Use the **Tariffing Interval (sec.)** option to specify the billing increment. For example if this option is set to 60 then the cost of the call will increase by the amount in the **Tariff** option every 60 seconds.

Press the **OK** button and then the **Save** button to activate your international call charges. The CAM rates configuration screen should now resemble the following.

You have now successfully configured CAM to apply costs to your international calls. All international calls will be billed using the rate specified above. If you would like to configure unique rates to international calls based on country or phone number dialled then please see Step 4.

4. This step describes how to apply unique international call rates based on the country or number dialled. If you would like to apply the same rate to all international calls then please return to step 3.

   To add a unique rate for a specific phone number (i.e. country code) position your cursor below the **Access Code 011*** option (and the **Rate** you created in step 3). An **Add** and **Delete** button should now be visible below the **Access Code 011*** item (pictured below).

Press the **Add** button. A new line should appear below the **Access Code 011*** text. Click the drop down box and change its value to **Number/Prefix**. Click the text box located to the right of the drop down box and change its value from an asterisk (*) to the telephone number (i.e. country code) you would like to apply a unique rate to followed by an asterisk(*). For example if you would like to apply a rate of 0.59/minute to all international calls to the United Kingdom then type 44* (44 is the UK's country code) into this box. Press the **Save** button to record your changes. Your screen should now resemble the following.

Please note, if you would like to apply unique rates to different number within the same country then add another Number Prefix line containing the required telephone number (i.e. the country code plus either a routing code or mobile number).

Next, click the (+) sign located to the left of the **Number/Prefix** option you just added (i.e. Number/Prefix 44). A new line should appear below this option. Position your mouse over the blue bar below the **Property Value** option to reveal **Add** and **Delete** buttons.

Press the **Add** button located below the text **Property Value**. A new blank line should appear below the Property/Property Value headers. Use the drop down list to set the Property value to **Rate**. The text *<Click [...] button to invoke property editor>* should now be contained in the **Property Value** box. Press the blue button containing three dots (located to the right of the property value text) to display the **Tariff Properties Web Page Dialog** window.

Check the **Plain rate/Connection fee** option to assign a flat rate to international calls to the UK (i.e. country code 44). A flat rate assigns the same price to all calls regardless of their duration (i.e. a 1 minute call costs the same as a 30 minute call). The following screen depicts how to apply a 4.12 flat charge to all international calls beginning with the telephone number you specified above (i.e. calls to the UK – country code 44).
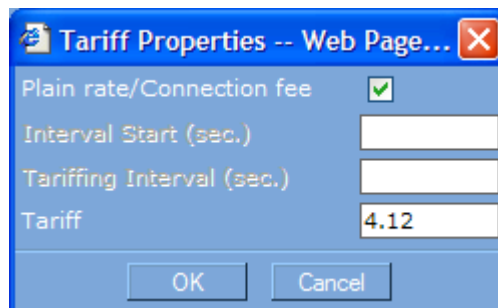
Uncheck the **Plain rate/Connection fee** option to assign a variable rate to all international calls beginning with the telephone number you specified above (i.e. calls to the UK – country code 44). A variable rate assigns a cost to a call based on its duration. The longer the call the more it costs (i.e. a 1 minute call costs less than a 30 minute call). The following screen depicts how to apply a charge of 0.59/minute to all international calls beginning with the number you specified above (i.e. calls to the UK – country code 44).

Use the **Interval Start (sec.)** option to identify when to start applying charges to an international call. For example if this option is set to 30 then the first 30 seconds of the call will be free (i.e. call billing starts at the 31st second). Setting this value to zero causes the call to be billed for its entire duration. Usually this option is set to zero.

Use the **Tariffing Interval (sec.)** option to specify the billing increment. For example if this option is set to 60 then the cost of the call will increase by the amount in the **Tariff** option every 60 seconds.

Press the **OK** button and then the **Save** button to activate your new international call charges. The CAM rates configuration screen should now resemble the following.

You have now successfully added a unique international rate to a specific phone number (i.e. call to the UK – country code 44). Repeat this step for each rate you would like to apply to a different international telephone number or country code.

5.2 Pricing Calls from International Number Plan Countries

The International Numbering Plan is applicable to all countries except Canada, the United States of America (USA) and the Caribbean. If your software is being deployed in these North American countries then refer to the Pricing Calls from NANP Countries section of this guide.

Use the following steps to price the telephone call records captured by your CAM software when its deployed in an international numbering plan country.

1. Access the **Rates** tool by selecting the Rates icon from the **Settings** menu. The following screen should now be visible.
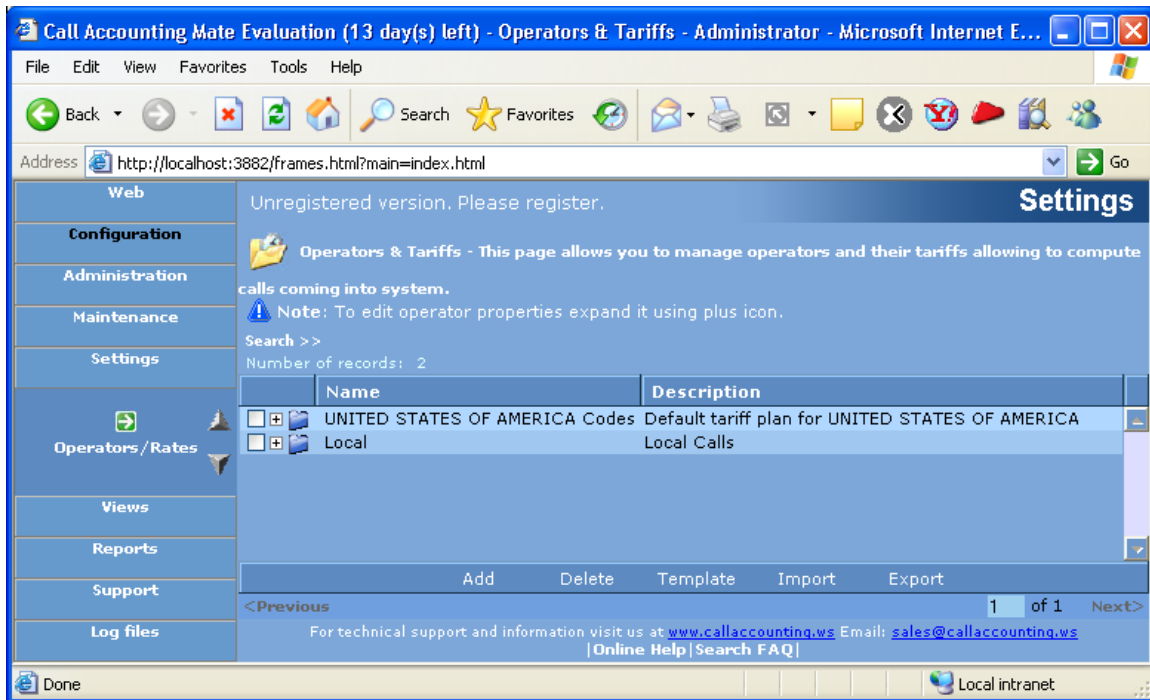
By default the CAM software assumes your telephone system is located in the United States. If your software is located in the United States, Canada or the Caribbean please consult the Pricing Calls from NANP Countries section of this guide. If the country displayed on this screen is the location where your software is deployed then skip ahead to step 5.

2. Press the **Template** button located on the bottom of the screen. The **Default Tariff Plan Wizard** dialog should now be visible.

Click the **Country** drop down list to select the country where your telephone system is located. For example, if your telephone system is located in the United Kingdom then select the United Kingdom, if your software is located in France then select France, if your software is located in China then select China, etc. If your country name is not displayed in this list then email our support department at support@callaccounting.ws.

3. After selecting the country where your software is located change the **Create Mode** option to **Replace Existing Plan**. For example if your software is located in United Kingdom then the screen should look as follows.

4. Press the **OK** button. The United States region information will be replaced with the newly selected country (i.e. United Kingdom).
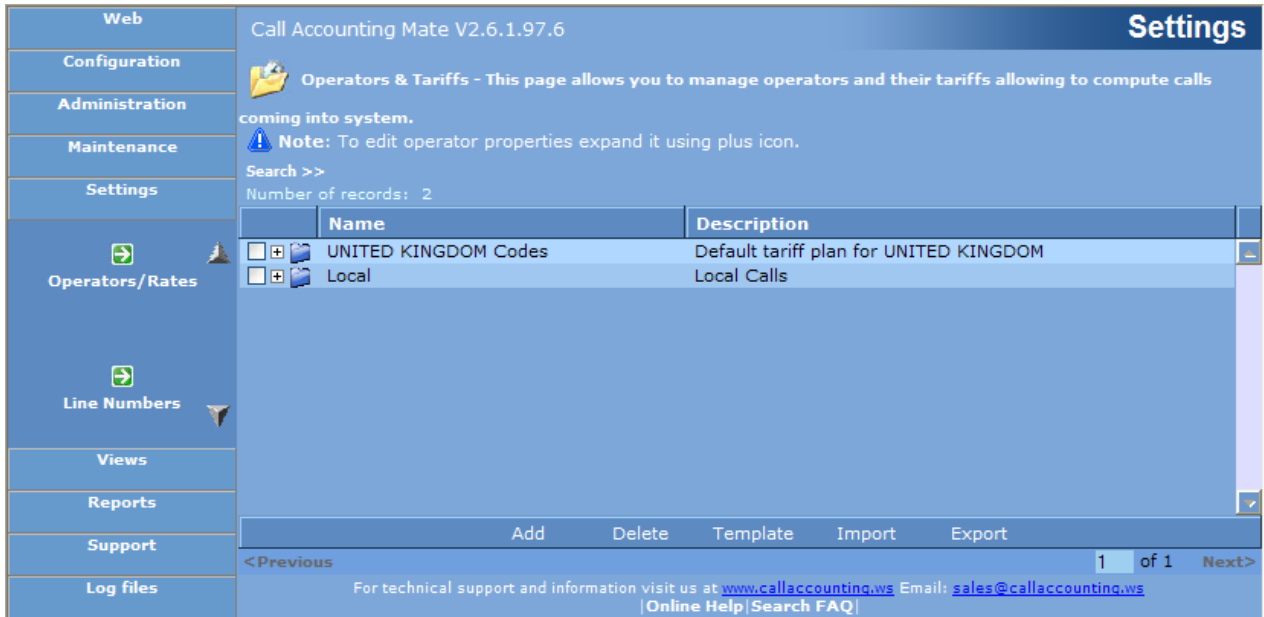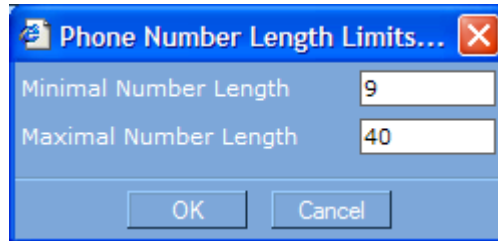
5. Next, to configure the international numbering plan click the (+) sign to the left of the country name where your software is deployed. Note: The following steps assume the software is deployed in the United Kingdom. The steps are the same regardless of where the software is located (i.e. France, Australia, Hong Kong, China, Brazil, Ghana, South Africa, Germany, etc.).
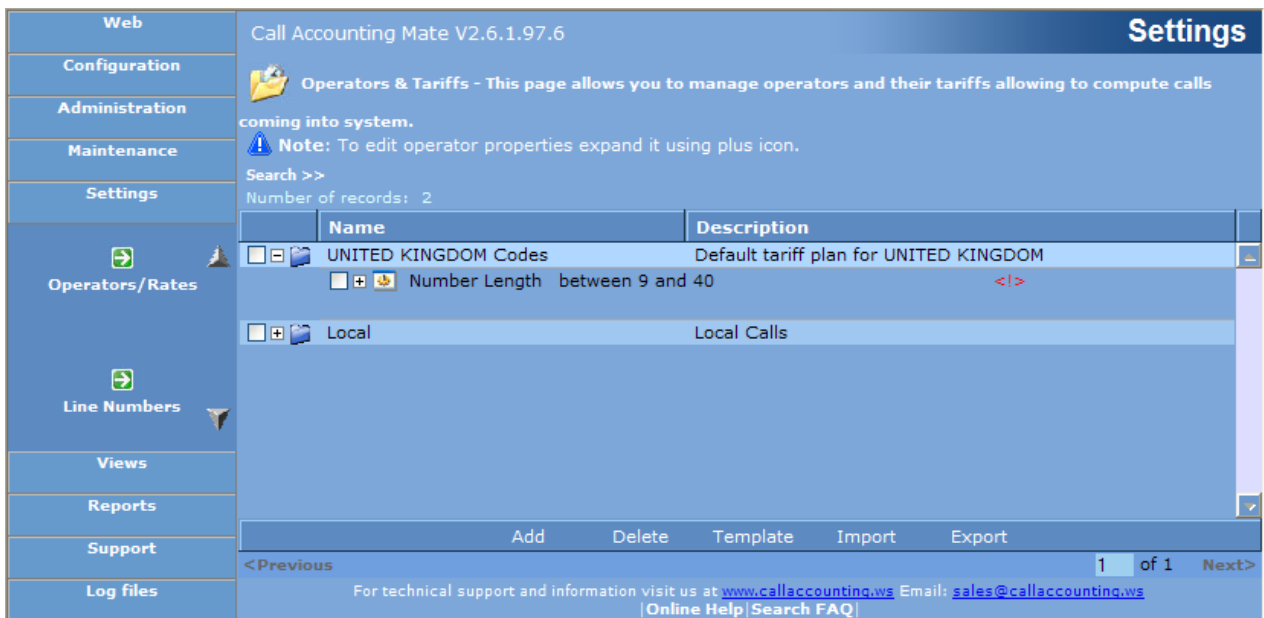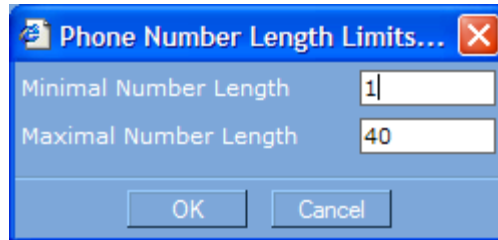
The option **Number Length between 9 and 40** should now be visible below the (+) sign you clicked in the previous step. Additionally the (+) sign will have changed to a (-) sign. Clicking the (-) sign again will change it back to a (+) sign and hide the new option.

6. Click the text **Number Length**. This will allow you to edit this item. Now click the blue button to the right of the text **between 9 and 40**. The **Phone Number Length Limits** dialog box should now be visible on your screen.

Change the **Minimum Number Length** value from 9 to 1.

Press the **OK** button. The rates window should now show your changes. An example of this window is pictured below.

Press the **Save** button to record your changes. The Rates screen should now resemble the following.

7. Click and expand (+) sign located to the left of the **Number Length between 1 and 40** item.

Two new options, **Access Code 00*** and **Number/Prefix 0*** should now be visible on your screen.

8. Position your mouse pointer below the **Number Prefix 0*** line visible in Step 7. A new line displaying an **Add** and **Delete** button should now be visible.

Press the **Add** button. A new line should now appear either below or over the existing **Number Prefix 0*** line. Select the **Number Prefix** option from the drop down list. The box to the right of the Number Prefix text should contain an asterisk (*). If it doesn't, change this box to an asterisk (*). Press the **Save** button to record your changes. A new line containing the text **Number Prefix *** should now be visible.

9. Click and expand the (+) sign located to the left of the text **Number/Prefix *** that you added in step 8. The following should now be visible on your screen

Position your mouse over the blue bar below the **Property Value** header. An **Add** and **Delete** button should now be visible. Press the **Add** button. A new line should now appear. Select the **Set Region** option from the drop down list. The box to the right of the set region text should contain *<Click [...] button to invoke property editor>*. Press the blue button containing three dots (located to the right of the property value text) to display the **Select Region(s) -- Web Page Dialog** window.

Select the region name where your software is deployed (i.e. the same region name you selected in step 3) and then press the **OK** button. Now press the **Save** button to record your changes. A new line containing the text S**et region** should now be visible

You have now configured your CAM software to recognize the International Numbering Plan of the country where your software is deployed. Please consult the following sections to add local, long distance and international rates to your International Numbering Plan.

5.2.1 Adding Local Rates

The CAM software can be configured to add call pricing to local calls for deployments utilizing an International Number Plan. Local calls within countries utilizing the international number plan begin with the number 1 through 9. Please note, prior to implementing local call pricing you must configure the CAM software to utilize the International Numbering Plan (see Pricing Calls from International Number Plan Countries). Use the following steps to configure CAM with local call pricing.

1. Access the CAM **Rates** tool by selecting the Rates icon from the **Settings** menu. Click the (+) sign located to the left of the country name identifying the region/country where your software is installed (i.e. for United Kingdom installations the (+) sign is to the left of the text 'UNITED KINGDOM Codes', for installations in Australia the (+) sign is to the left of the text 'AUSTRALIA Codes'). Please note, if your country name is not visible on this screen then you must re-configure your software to support your country (see Pricing Calls from International Number Plan Countries).

2. Next, click and expand the (+) sign located to the left of the text **Number Length between 1 and 40 digits**. Now click and expand the (+) sign located to the left of the text **Number Prefix ***. Finally, click and expand the (+) sign located to the left of the text **Set Region – <country name>**. The following should now be visible on your screen.

3. If you would like to add unique rates for specific phone numbers (i.e. city codes) then skip
    ahead to step 4 otherwise to apply the same rate to all local calls press the **Add** button located
    below the text **Property Value**. A new blank line should appear below the Property/Property
    Value headers. Use the drop down list to set the Property to **Rate**. The text ***<Click [...] button***
    to invoke property editor> should now be contained in the **Property Value** box. Press the
    blue button containing three dots (located to the right of the property value text) to display the
    Tariff Properties Web Page Dialog window.

Check the **Plain rate/Connection fee** option to assign a flat rate to your local calls. A flat rate
assigns the same price to all calls regardless of their duration (i.e. a 1 minute call costs the
same as a 30 minute call). The following screen depicts how to apply a 0.25 flat charge to all
local calls.

Uncheck the **Plain rate/Connection fee** option to assign a variable rate to your local calls. A variable rate assigns a cost to a call based on its duration. The longer the call the more it costs (i.e. a 1 minute call costs less than a 30 minute call). The following screen depicts how to apply a charge of 0.05/minute to all local calls.

Use the **Interval Start (sec.)** option to identify when to start applying charges to a local call. For example if this option is set to 30 then the first 30 seconds of the call will be free (i.e. call billing starts at the 31st second). Setting this value to zero causes the call to be billed for its entire duration. Usually this option is set to zero.

Use the **Tariffing Interval (sec.)** option to specify the billing increment. For example if this option is set to 60 then the cost of the call will increase by the amount in the **Tariff** option every 60 seconds.

Press the **OK** button and then the **Save** button to activate your local call charges. The CAM rates configuration screen should now resemble the following.

You have now successfully configured CAM to apply costs to your local calls. All local calls will be billed using the rate specified above. If you would like to configure unique rates to local calls based on phone number then please see Step 4.

4. This step describes how to apply unique local call rates based on the number dialled. If you would like to apply the same rate to all local calls then please return to step 3.

   To add a unique rate for a specific phone number (i.e. city code) position your cursor below the **Set Region** code option (and the **Rate** you created in step 3). An **Add** and **Delete** button should now be visible below the Set Region item (pictured below).

Press the **Add** button. A new line should appear below the **Set region** text. Click the drop down box and change its value to **Number/Prefix**. Click the text box located to the right of the drop down box and change its value from an asterisk (*) to the local telephone number you would like to apply a unique rate to followed by an asterisk(*). For example if you would like to apply a rate of 0.07/minute to all local calls beginning with 31 then type 31* into this box. Press the **Save** button to store your changes. Your screen should now resemble the following.

Next, click the (+) sign located to the left of the **Number/Prefix** option you just added (i.e. Number/Prefix 31*). A new line should appear below this option. Position your mouse over the blue bar below the Property Value option to reveal **Add** and **Delete** buttons.

Press the **Add** button located below the text **Property Value**. A new blank line should appear below the Property/Property Value headers. Use the drop down list to set the Property value to **Rate**. The text *<Click [...] button to invoke property editor>* should now be contained in the **Property Value** box. Press the blue button containing three dots (located to the right of the property value text) to display the **Tariff Properties Web Page Dialog** window.

Check the **Plain rate/Connection fee** option to assign a flat rate to these local calls. A flat rate assigns the same price to calls regardless of their duration (i.e. a 1 minute call costs the same as a 30 minute call). The following screen depicts how to apply a 0.23 flat charge to all local calls beginning with the telephone number you specified above (i.e. 31).

Uncheck the **Plain rate/Connection fee** option to assign a variable rate to all local calls beginning with the telephone number you specified above (i.e. 31). A variable rate assigns a cost to these calls based on duration. The longer the call the more it costs (i.e. a 1 minute call costs less than a 30 minute call). The following screen depicts how to apply a charge of 0.07/minute to all local calls beginning with the number you specified above (i.e. 31).

Use the **Interval Start (sec.)** option to identify when to start applying charges to a local call. For example if this option is set to 30 then the first 30 seconds of the call will be free (i.e. call billing starts at the 31st second). Setting this value to zero causes the call to be billed for its entire duration. Usually this option is set to zero.

Use the **Tariffing Interval (sec.)** option to specify the billing increment. For example if this option is set to 60 then the cost of the call will increase by the amount in the **Tariff** option every 60 seconds.

Press the **OK** button and then the **Save** button to activate your local call charges. The CAM rates configuration screen should now resemble the following.

You have now successfully added a unique local rate to a specific phone number (i.e. 31). Repeat this step for each unique rate you would like to apply to a local telephone number.

5.2.2 Adding Long Distance Rates

The CAM software can be configured to add call pricing to long distance calls within the country (i.e. 0+ calls) for deployments utilizing the International Number Plan. Long distance calls within a country utilizing the international number plan begin with the number 0. Please note, prior to implementing long distance call pricing you must configure the CAM software to utilize the International Numbering Plan (see Pricing Calls from International Number Plan Countries).

1. Access the CAM **Rates** tool by selecting the Rates icon from the **Settings** menu. Click the (+) sign located to the left of the country name identifying the region/country where your software is installed (i.e. for United Kingdom installations the (+) sign is to the left of the text 'UNITED KINGDOM Codes', for installations in Australia the (+) sign is to the left of the text 'AUSTRALIA Codes'). Please note if your country name is not visible on this screen then you must re-configure your software to support your country (see Pricing Calls from International Number Plan Countries).

2. Next, click and expand the (+) sign located to the left of the text **Number Length between 1 and 40 digits**. Now click and expand the (+) sign located to the left of the text **Number Prefix 0***. Finally, click and expand the (+) sign located to the left of the text **Set Region – <country name>**. The following should now be visible on your screen.
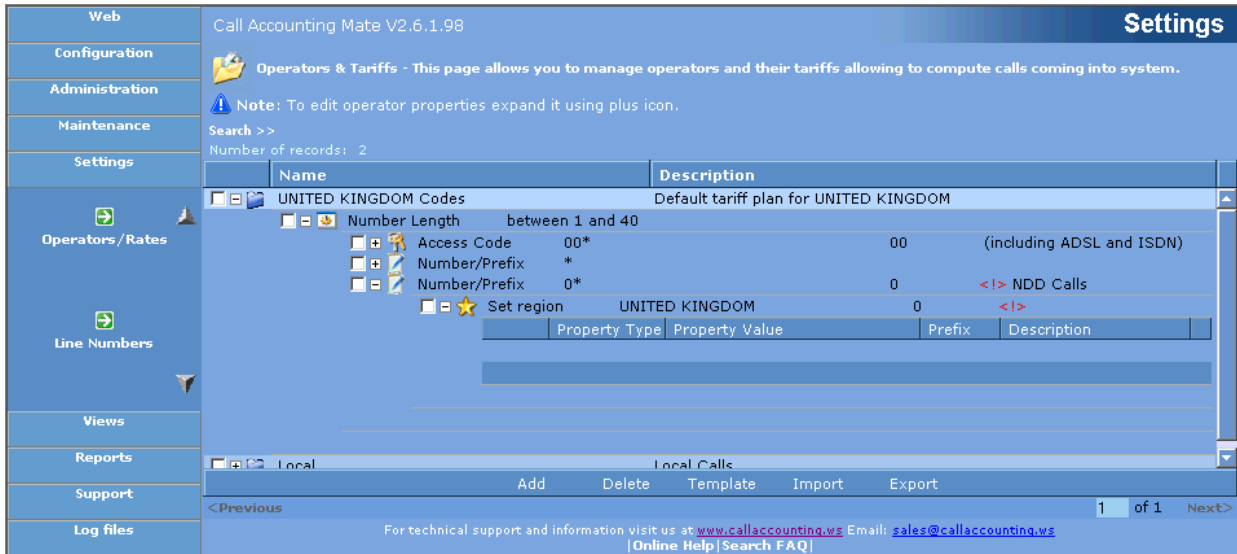
3. If you would like to add unique rates for specific city codes or phone numbers then skip ahead to step 4. Otherwise to apply the same rate to all long distance calls position your mouse over the blue bar below the Property Value option to reveal **Add** and **Delete** buttons. Press the **Add** button. A new blank line should appear either below or over the Set region text. Use the drop down list to set the Property value to **Rate**. The text *<Click [...] button to invoke property editor>* should now be contained in the **Property Value** box. Press the blue button containing three dots (located to the right of the property value text) to display the **Tariff Properties Web Page Dialog** window.

Check the **Plain rate/Connection fee** option to assign a flat rate to your long distance calls. A flat rate assigns the same price to all calls regardless of their duration (i.e. a 1 minute call costs the same as a 30 minute call). The following screen depicts how to apply a 0.49 flat charge to all long distance calls.

Uncheck the **Plain rate/Connection fee** option to assign a variable rate to your long distance calls. A variable rate assigns a cost to a long distance calls based on its duration. The longer the call the more it costs (i.e. a 1 minute call costs less than a 30 minute call). The following screen depicts how to apply a charge of 0.09/minute to all long distance calls.

Use the **Interval Start (sec.)** option to identify when to start applying charges to a long distance call. For example if this option is set to 30 then the first 30 seconds of the call will be free (i.e. call billing starts at the 31st second). Setting this value to zero causes the call to be billed for its entire duration. Usually this option is set to zero.

Use the **Tariffing Interval (sec.)** option to specify the billing increment. For example if this option is set to 60 then the cost of the call will increase by the amount in the **Tariff** option every 60 seconds.

Press the **OK** button and then the **Save** button to activate your long distance call charges. The CAM rates configuration screen should now resemble the following.

You have now successfully configured CAM to apply costs to your long distance calls. All long distance calls will be billed using the rate specified above. If you would like to configure unique rates to long distance calls based on phone number then please see Step 4.

4. This step describes how to apply unique long distance call rates based on the number dialled. If you would like to apply the same rate to all long distance calls then please return to step 3.

    To add a unique rate for a specific phone number (i.e. city code) position your cursor below the **Set Region** code option (and the **Rate** you created in step 3). An **Add** and **Delete** button should now be visible below the Set Region item (pictured below).

Press the **Add** button. A new line should appear below the **Set Region** text. Click the drop down box and change its value to **Number/Prefix**. Click the text box located to the right of the drop down box and change its value from an asterisk (*) to the telephone number (i.e. area code) you would like to apply a unique rate to followed by an asterisk(*). For example if you would like to apply a rate of 0.11/minute to all long distance calls beginning with 52 then type 52* into this box. Press the Save button to record your changes. Your screen should now resemble the following.

Next, click the (+) sign located to the left of the **Number/Prefix** option you just added (i.e. Number/Prefix 52*). A new line should appear below this option. Position your mouse over the blue bar below the **Property Value** option to reveal **Add** and **Delete** buttons.

Press the **Add** button located below the text **Property Value**. A new blank line should appear below the Property/Property Value headers. Use the drop down list to set the Property value to **Rate**. The text *<Click [...] button to invoke property editor>* should now be contained in the **Property Value** box. Press the blue button containing three dots (located to the right of the property value text) to display the **Tariff Properties Web Page Dialog** window.

Check the **Plain rate/Connection fee** option to assign a flat rate to all long distance calls beginning with 52. A flat rate assigns the same price to all calls regardless of their duration (i.e. a 1 minute call costs the same as a 30 minute call). The following screen depicts how to apply a 0.51 flat charge to all long distance calls beginning with the telephone number you specified above (i.e. 52).
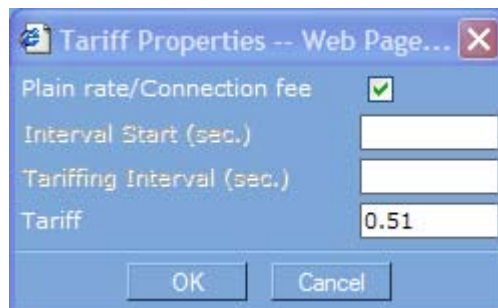
Uncheck the **Plain rate/Connection fee** option to assign a variable rate to all long distance calls beginning with the telephone number you specified above (i.e. 52). A variable rate assigns a cost to a call based on its duration. The longer the call the more it costs (i.e. a 1 minute call costs less than a 30 minute call). The following screen depicts how to apply a charge of 0.11/minute to all long distance calls beginning with the number you specified above (i.e. 52).

Use the **Interval Start (sec.)** option to identify when to start applying charges to a long distance call. For example if this option is set to 30 then the first 30 seconds of the call will be free (i.e. call billing starts at the 31st second). Setting this value to zero causes the call to be billed for its entire duration. Usually this option is set to zero.

Use the **Tariffing Interval (sec.)** option to specify the billing increment. For example if this option is set to 60 then the cost of the call will increase by the amount in the **Tariff** option every 60 seconds.

Press the **OK** button and then the **Save** button to activate your long distance call charges. The CAM rates configuration screen should now resemble the following.

You have now successfully added a unique long distance rate to calls with a specific phone number (i.e. beginning with 52). Repeat this step for each unique rate you would like to apply to a different long distance telephone number or city code.

5.2.3 Adding International Rates

The CAM software can be configured to add call pricing to international calls (i.e. 00+ calls to France, China, Australia, etc.) for deployments utilizing the International Number Plan. International calls from a country utilizing the international number plan begin with the number 00. Please note, prior to implementing international call pricing you must configure the CAM software to utilize the International Numbering Plan (see Pricing Calls from International Number Plan Countries). Use the following steps to configure CAM with International Call Pricing.

1. Access the CAM **Rates** tool by selecting the Rates icon from the **Settings** menu. Click the (+) sign located to the left of the country name identifying the region/country where your software is installed (i.e. for United Kingdom installations the (+) sign is to the left of the text 'UNITED KINGDOM Codes', for installations in Australia the (+) sign is to the left of the text 'AUSTRALIA Codes'). Please note if your country name is not visible on this screen then you must re-configure your software to support your country (see Pricing Calls from International Number Plan Countries).

2. Next, click and expand the (+) sign located to the left of the text **Number Length between 1 and 40 digits**. Now click and expand the (+) sign located to the left of the text **Access Code 00***. The following should now be visible on your screen

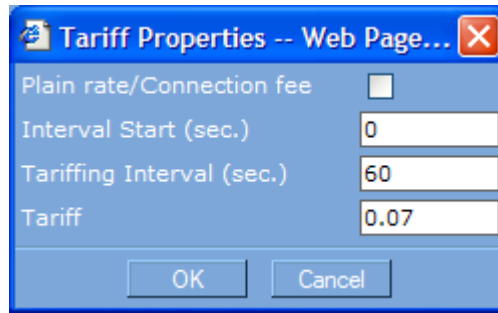3. If you would like to add unique rates for specific countries or phone numbers then skip ahead to step 4 otherwise to apply the same rate to all international calls press the **Add** button located below the text **Property Value**. A new blank line should appear below the Property/Property Value headers. Use the drop down list to set the Property value to **Rate**. The text *<Click [...] button to invoke property editor>* should now be contained in the **Property Value** box. Press the blue button containing three dots (located to the right of the property value text) to display the **Tariff Properties Web Page Dialog** window.

Check the **Plain rate/Connection fee** option to assign a flat rate to your international calls. A flat rate assigns the same price to all international calls regardless of their duration (i.e. a 1 minute call costs the same as a 30 minute call). The following screen depicts how to apply a 1.42 flat charge to all international calls.

Uncheck the **Plain rate/Connection fee** option to assign a variable rate to your international calls. A variable rate assigns a cost to a call based on its duration. The longer the call the more it costs (i.e. a 1 minute call costs less than a 30 minute call). The following screen depicts how to apply a charge of 0.79/minute to all international calls.

Use the **Interval Start (sec.)** option to identify when to start applying charges to an international call. For example if this option is set to 30 then the first 30 seconds of the call will be free (i.e. call billing starts at the 31st second). Setting this value to zero causes the call to be billed for its entire duration. Usually this option is set to zero.

Use the **Tariffing Interval (sec.)** option to specify the billing increment. For example if this option is set to 60 then the cost of the call will increase by the amount in the **Tariff** option every 60 seconds.

Press the **OK** button and then the **Save** button to activate your international call charges. The CAM rates configuration screen should now resemble the following.

You have now successfully configured CAM to apply costs to your international calls. All international calls will be billed using the rate specified above. If you would like to configure unique rates to international calls based on country or phone number dialled then please see Step 4.

4. This step describes how to apply unique international call rates based on the country or number dialled. If you would like to apply the same rate to all international calls then please return to step 3.

To add a unique rate for a specific phone number (i.e. country code) position your cursor below the **Access Code 00*** option (and the **Rate** you created in step 3). An **Add** and **Delete** button should now be visible below the **Access Code 00*** item (pictured below).

Press the **Add** button. A new line should appear below the **Access Code 00*** text. Click the drop down box and change its value to **Number/Prefix**. Click the text box located to the right of the drop down box and change its value from an asterisk (*) to the telephone number (i.e. country code) you would like to apply a unique rate to followed by an asterisk (*). For example if you would like to apply a rate of 0.59/minute for calls to France then type 33* (France's country code is 33) into this box (the country code for the Canada, the Caribbean and the USA is 1). Press the **Save** button to record your changes. Your screen should now resemble the following.

Please note, if you would like to apply unique rates to a different number within the same country then add another Number Prefix line containing the required telephone number (i.e. the country code plus either a city code or mobile number).

Next, click the (+) sign located to the left of the **Number/Prefix** option you just added (i.e. Number/Prefix 33*). A new line should appear below this option. Position your mouse over the blue bar below the **Property Value** option to reveal **Add** and **Delete** buttons.

Press the **Add** button located below the text **Property Value**. A new blank line should appear below the Property/Property Value headers. Use the drop down list to set the Property value to **Rate**. The text *<Click [...] button to invoke property editor>* should now be contained in the **Property Value** box. Press the blue button containing three dots (located to the right of the property value text) to display the **Tariff Properties Web Page Dialog** window.

Check the **Plain rate/Connection fee** option to assign a flat rate to international calls to France (i.e. country code 33). A flat rate assigns the same price to all calls regardless of their duration (i.e. a 1 minute call costs the same as a 30 minute call). The following screen depicts how to apply a 4.12 flat charge to all international calls beginning with the telephone number you specified above (i.e. calls to France – country code 33).
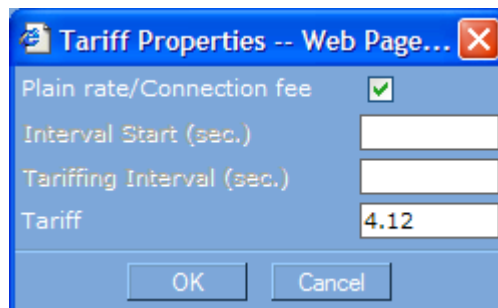
Uncheck the **Plain rate/Connection fee** option to assign a variable rate to all international calls beginning with the telephone number you specified above (i.e. calls to France – country code 33). A variable rate assigns a cost to a call based on its duration. The longer the call the more it costs (i.e. a 1 minute call costs less than a 30 minute call). The following screen depicts how to apply a charge of 0.59/minute to all international calls beginning with the number you specified above (i.e. calls to France – country code 33).

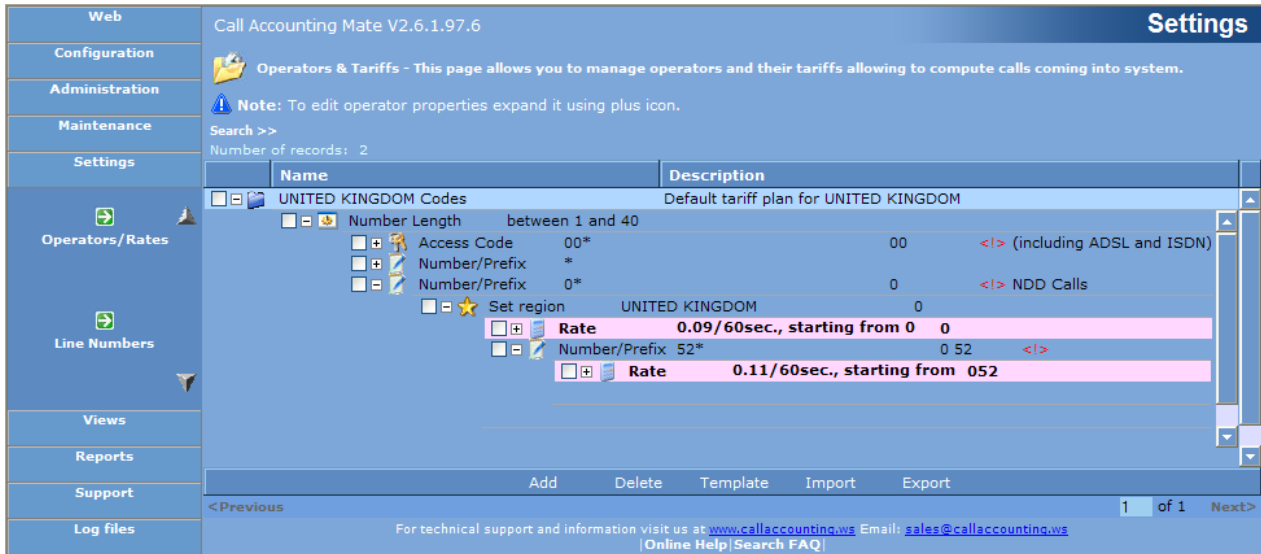Use the **Interval Start (sec.)** option to identify when to start applying charges to an international call. For example if this option is set to 30 then the first 30 seconds of the call will be free (i.e. call billing starts at the 31st second). Setting this value to zero causes the call to be billed for its entire duration. Usually this option is set to zero.

Use the **Tariffing Interval (sec.)** option to specify the billing increment. For example if this option is set to 60 then the cost of the call will increase by the amount in the **Tariff** option every 60 seconds.

Press the **OK** button and then the **Save** button to activate your new international call charges. The CAM rates configuration screen should now resemble the following.

You have now successfully added a unique international rate to a specific phone number (i.e. call to France – country code 33). Repeat this step for each rate you would like to apply to a different international telephone number or country code.

6.0 Using Call Accounting Mate

Now that you have installed the CAM software (see Installing Call Accounting Mate) and successfully configured the software (see Starting/Configuring Call Accounting Mate), you are now ready to begin using the software.

If you have just completed configuring the CAM software, the software should have automatically started. Otherwise, to start CAM use the following steps

1.   Press the Windows Start button.
2.   Select the Programs menu item.
3.   Select the Call Accounting Mate menu item.
4.   Click the Run Call Accounting Mate icon.

The CAM software login window should appear on your screen.
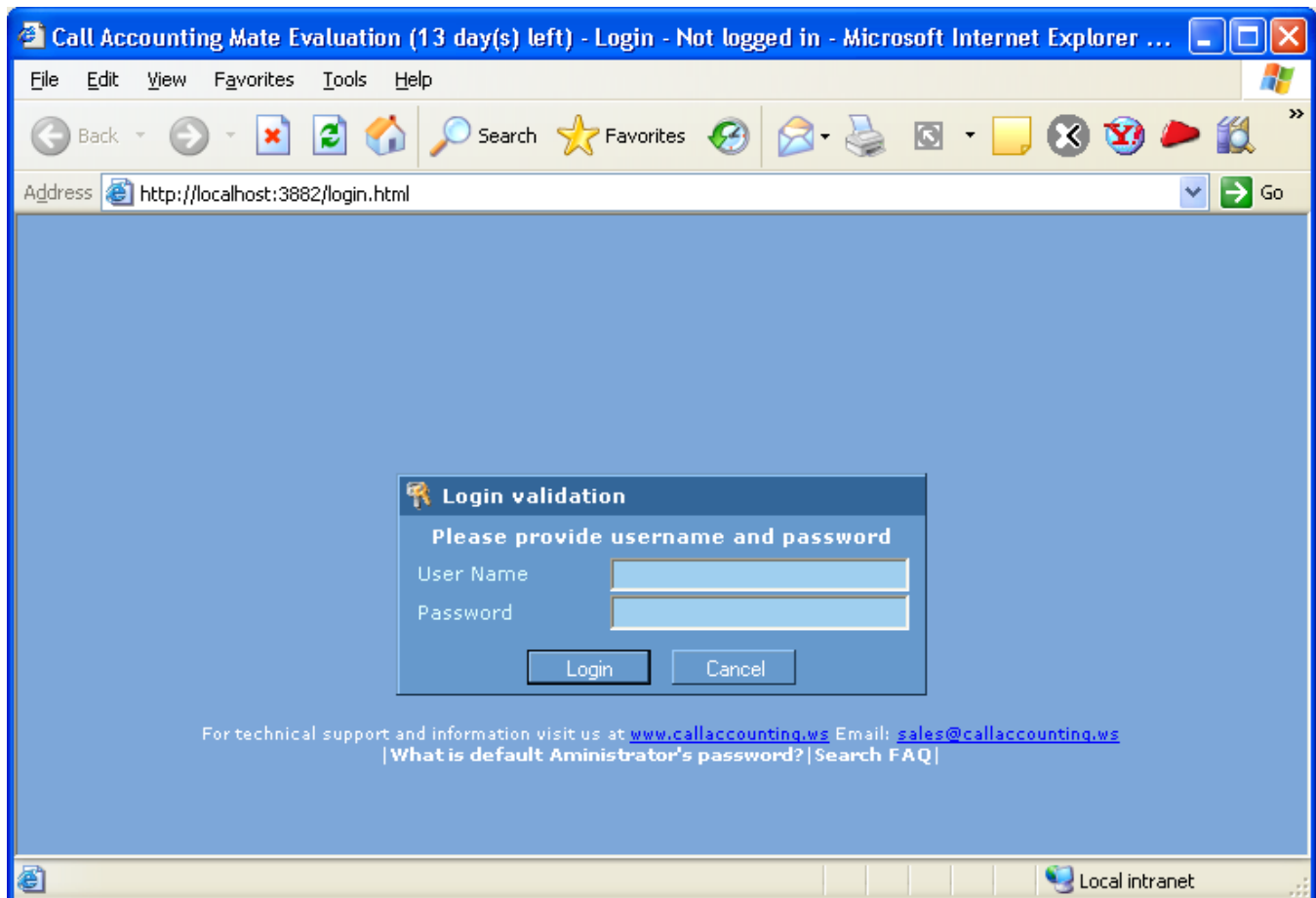
6.1 Verifying CAM is Collecting Telephone Records

The CAM software contains a call record collection monitoring tool which lets you view CDR/SMDR records as they are generated. You can access this tool by clicking the **Live** icon from the **Views** menu. Next click the **Raw** icon/menu item. Once selected the CAM Raw SMDR Data screen will be displayed within your browser.
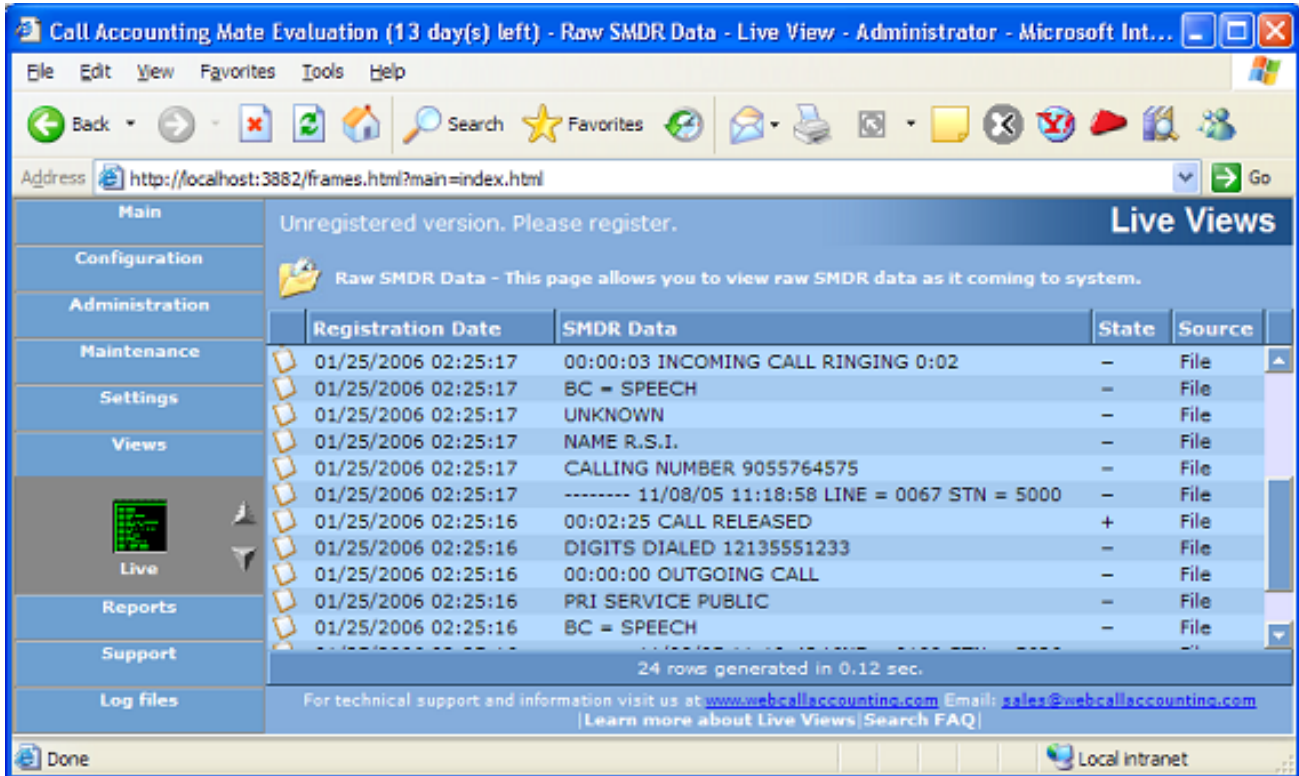
Each time a new call is completed its raw SMDR data will be appended to this screen. Use the scroll bar to move up and down. Only the most recent 50 records can be viewed. Please note the format of the data displayed will vary from telephone system to telephone system. Your data will only resemble the above if you are using a Norstar telephone system.

Note the raw data display area may initially appear blank when this window is activated. You can test your connection by placing a test call (must be a call that generates a CDR/SMDR call record – i.e. long distance or local). Once the test call is completed (i.e. you hang up) the telephone record (SMDR/CDR) will be displayed in this window. Examine the data for the telephone number you dialled. If no data appears then either your telephone system is not connected properly to this computer or the telephone system is not generating SMDR/CDR records. If the information is illegible (i.e. garbage) then your communications settings are incorrect (double click the **PBX Communications** icon in the **Configuration** menu and verify the information on the Port tab is correct – see Starting and Configuring Call Accounting Mate). If you need assistance please contact us at support@callaccounting.ws.

6.2 Generating Reports

The Call Accounting Mate software contains a comprehensive set of management reports. Reports can be viewed on the screen, printed or emailed. Users can access CAM's reports by selecting the **List** option from the **Reports** menu (pictured below).
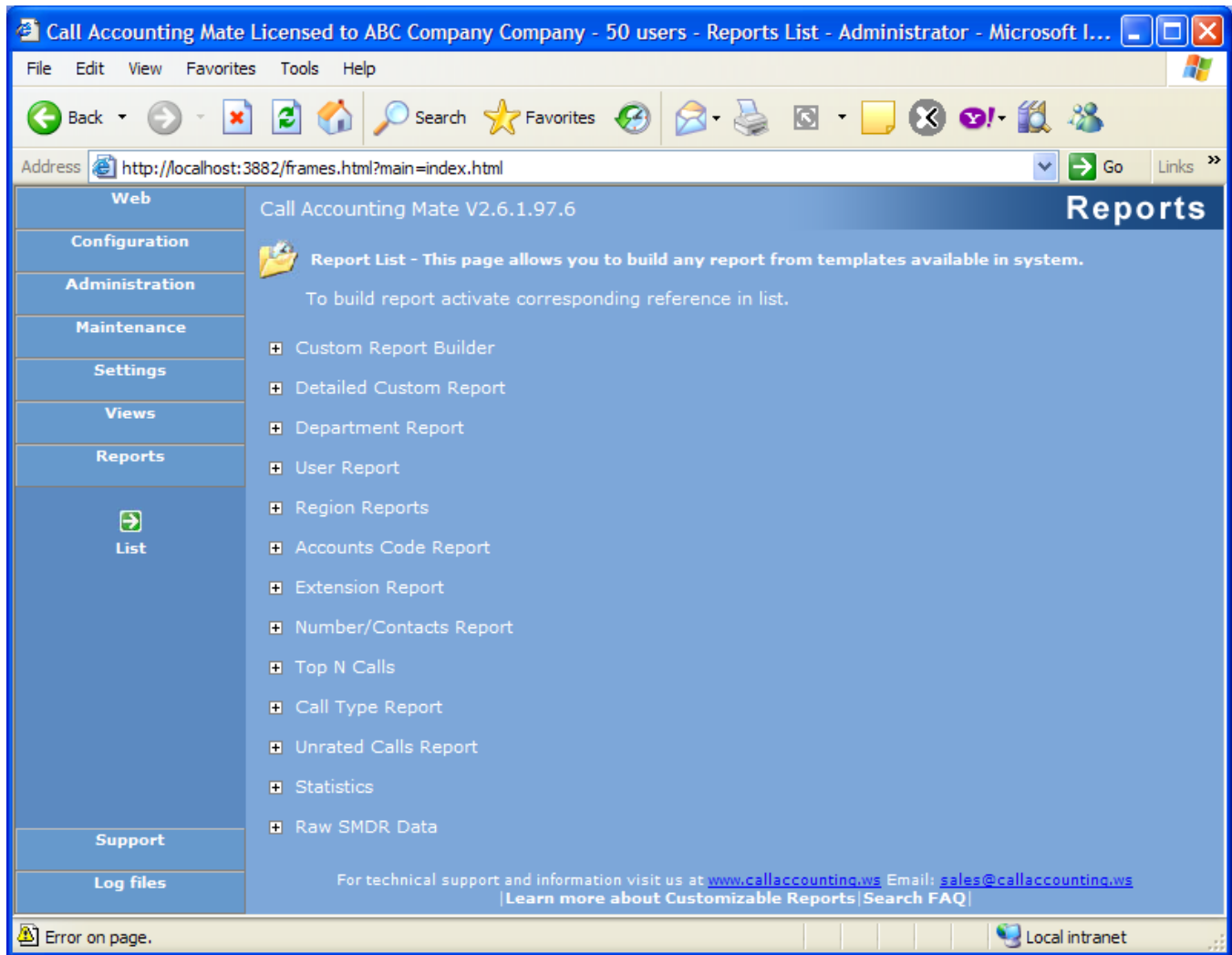
The above screen depicts the list of CAM's report groups. A report group contains a set of reports with common characteristics (i.e. Department Reports, User Reports, Region Reports, etc). View the contents of a report group by clicking and expanding the plus (+) sign located to the left of its group name. For example to view the list of User Reports click and expand the User Report group. The following list of reports should now be displayed on your screen.

Each report group can contain two distinct types of reports.

- Easy Reports

- Flexible Reports

The following sections provides an overview of both easy and flexible reports, including instructions on how to generate reports, utilize filters/queries to control report content, and change a report's format and sort order.

6.2.1 Easy Reports

Easy Reports are the simplest and easiest to use Call Accounting Mate reports. Easy reports can usually be identified by the appearance of the text '(Easy)' to the right of the report name. Each easy report contains a report specific user interface. This interface provides users with a limited, preset list of filter/query options to select which calls are included in a report. Typical filter/query options available with an Easy report include extension/user, department, date range, time range, call type (i.e. local, long distance, international, all calls), and line number. Filters/queries must be specified each time a report is generated. Additionally, report format and sort order cannot be changed. Users requiring dynamic filters/queries, variable report formats and sort orders should utilize a flexible report.

The following example provides instructions on how to generate the Detailed Report (Easy) from the User Report group.

1. Launch and log into the CAM software (see Starting Call Accounting Mate).

2. Select the **List** item from the **Reports** menu. Next click and expand the plus (+) sign located to the left of the **User Report** group. The User Report Group list should now be visible on your screen.

3. Click the **Detailed Report (Easy)** item. The Detailed Report (Easy) user interface should now be visible on your screen.
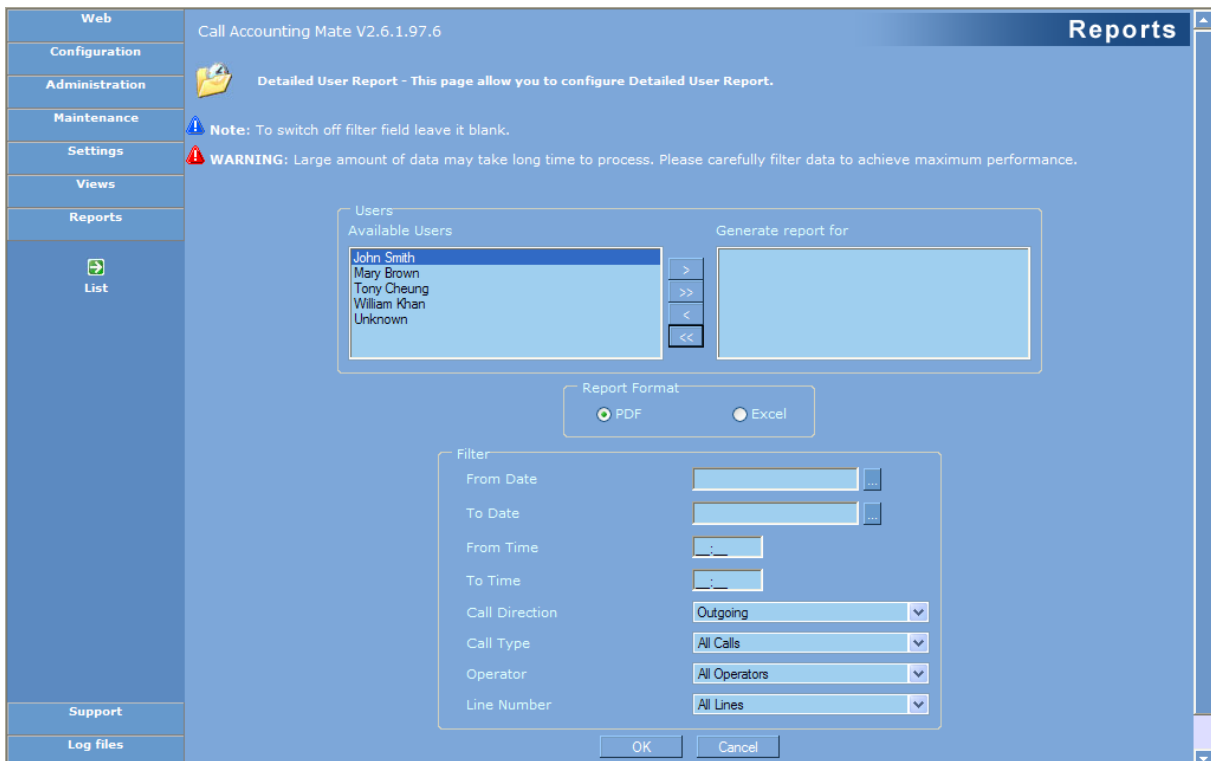
Use the **Available Users** list to select which users calls will be included in the report. Add a user to the report by selecting it from the **Available Users** list. Next, press the **>** button. The selected user will be moved to the **Generate report for** list. Add all users to the report by pressing the **>>** button. Remove a user from a report by selecting it from the "Generate report for" list. Next, press the **<** button. The selected user will be moved to the Available Users list. Remove all users from a report by pressing the **<<** button.

Use the **Report Format** option to generate the report in either PDF (requires Adobe Acrobat Reader) or MS Excel format. Note some reports are limited to PDF format only.

The **Filter** options allow you to select which calls will be included in the report. Use the **From Date** and **To Date** option to select calls by a date range (i.e. select calls from the past week). Click the button located to right of the date fields to display a calendar. Use the calendar to select the From/To Date. Use the **From Time** and **To Time** to select calls by a time range (i.e. select calls during business hours only - 08:30 to 17:00). Use the **Call Direction** option to select incoming, outgoing or all calls. Use the **Call Type** option to select local, long distance, international or all calls. **Use the Line Number** option to select calls placed/received on either a specific line or all lines.

Only calls satisfying all filter items will be included in report. For example if From Date is 08/01/2006 and the To Date is 08/31/2006, and the Call Direction is set to outgoing then only outgoing calls made during August 2006 will be included in the report.

4. Press the OK button to generate the report. Report generation may take a few seconds to several minutes (depending on call volumes). Once completed the report will be displayed on your screen.

You have now successfully generated an Easy Report with your CAM software. If the Easy Reports available in this software do not meet your requirements then try using Flexible Reports.

6.2.2 Flexible Reports

Call Accounting Mate's **Flexible Reports** provide users with control over report content and formats. User-defined report templates allow users to create custom filters/queries, change report formatting, and control sort order. The templates can be saved and re-used again and again by any flexible reports. Users can also create their own reports utilizing the Custom Report Builder.

The following example provides instructions on how to generate the Detailed Report (Flexible) from the User Report group.

1. Launch and log into the CAM software (see Starting Call Accounting Mate).

2. Select the **List** item from the **Reports** menu. Next click and expand the plus (+) sign located to the left of the **User Report** group. The User Report Group Builder should now be visible on your screen.
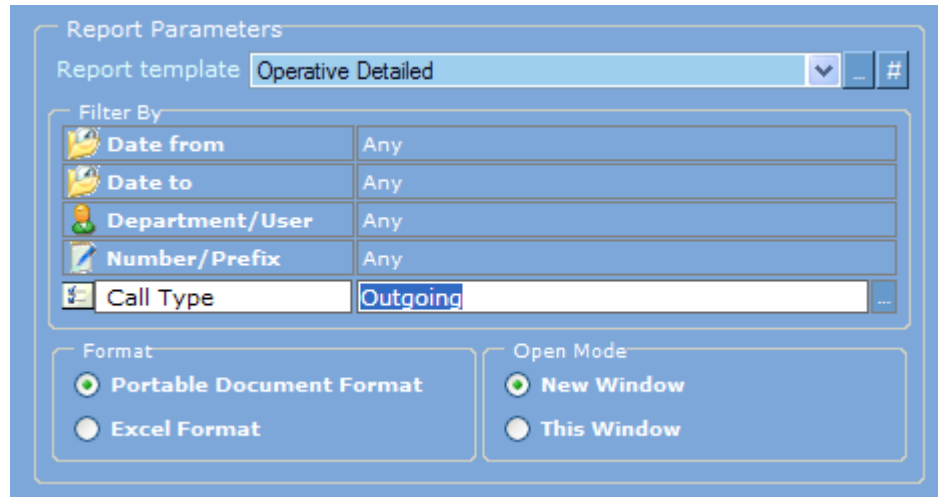
3. Click the **Detailed Report (Flexible)** item. The Detailed Report (Flexible) user interface should now be visible on your screen.
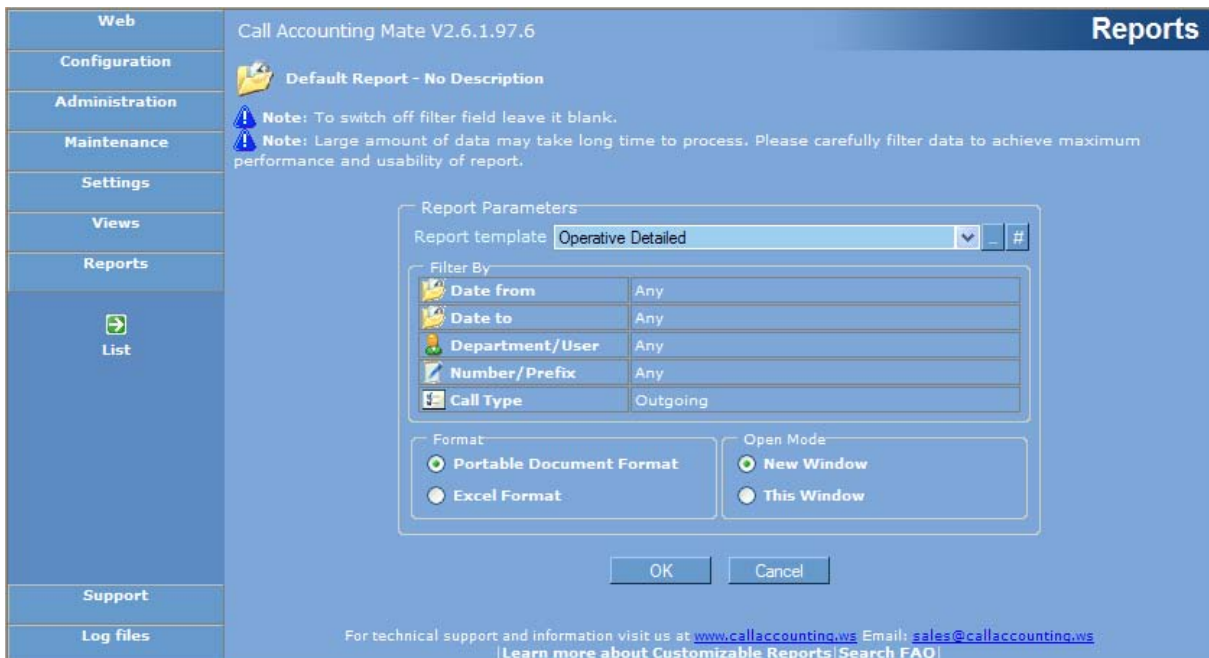
Use the Report Parameters box, located in the middle of the above screen, to select which calls are included in a report, the report format and its sort order. The Reports Parameter box contains four distinct sections (**Report Template**, **Filter By**, **Format** and **Open Mode**).

A **Report Template** controls the content and appearance of a report. Users can select an existing report template, create a new one, or modify an existing one. The selected report template determines which **Filter By** options are presented to the user. It also controls the default values of these filter by options (i.e. Any, Outgoing Call, etc.). For example, the Operative Detailed template (shown above) lets users select calls by Date (Any), Department/User (Any), Number/Prefix (Any), and Call Type (default value is Outgoing).

Modify a filter option by clicking it. Next, either type the desired value into the text box or press the button located to the right of the text to display a list of available values. For example, after clicking the Call Type option the Report Parameters should now appear as follows.
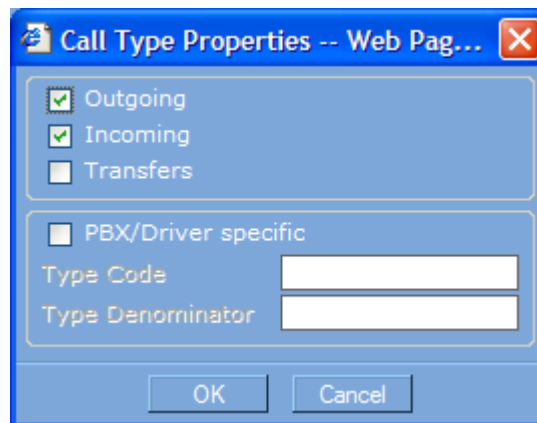
Press the button located to the right of the text "Outgoing" to display a list of possible values. If a button is not visible then simply type the desired value(s) into the box located to the right of the selected Filter By option (when entering two or more values separate each value by a comma). The Call Type Properties dialog box should now be visible on your screen.

Check the **Outgoing** option to include outgoing calls in the report. Check the **Incoming** option to include incoming calls in the report. Check both options to include both incoming and outgoing calls in the report. After selecting the desired options press the **OK** button to save your changes. The Report Parameters screen should now display the newly selected call type values.

A Report Template can also determine which columns (i.e. date, time, number dialed, extension, line, etc.) are displayed on a report and its sort order (i.e. calls are sorted by date, time, duration, extension, line, etc.). Select the desired report template by clicking the Report Template drop down list. Create or modify a report template by pressing the **Define Template** button located to the right of the template drop down list. Reset the Filter By options to their default values by pressing the **#** button located to the right of the report template. For more information on Report Templates please consult the Creating/Modifying Report Templates section of this guide.

Use the **Report Format** option to generate the report in either PDF (requires Adobe Acrobat Reader) or MS Excel format. Note some reports are limited to PDF format only

Use the **Open Mode** option to generate the report in either a New Window or This Window. If the **New Window** option is selected the report will be displayed in a new browser window. If the **This Window** option is select the report will appear within the current browser window (i.e. the window where you pressed the OK button).

4. Press the **OK** button to generate the report. Report generation may take a few seconds to several minutes (depending on call volumes). Once completed the report will be displayed on your screen.

You have now successfully generated a Flexible Report with your CAM software. Users looking for simpler and easy to configure reports should try using Easy Reports.

Note: Every Call Accounting Mate Flexible Report can be generated using the steps described above. Once you learn how to generate one flexible report you can generate any flexible report.

6.3 Report Templates

The Call Accounting Mate Flexible Reports utilize user-defined Report Templates. A Report Template controls the content and appearance of a report. Users can utilize a template to create custom filters/queries, change report formatting (not available on all reports), and control sort order. The templates can be saved and re-used again and again. Users can also create their own reports by utilizing a user-defined template with CAM's **Custom Report Builder**. Access the report template tool by selecting any flexible report. For example, select the Detail Report (Flexible) from the User Report group. The following should be now visible on your screen.

Users can select an existing report template, create a new one, or modify an existing one. The selected report template determines which filter/query options are presented to the user. It also controls the default values of the **Filter By** options (i.e. select only outgoing calls, etc.). For example, the Operative Detailed template (shown above) lets users select calls by Date (Any), Department/User (Any), Number/Prefix (Any), and Call Type (default value is Outgoing).
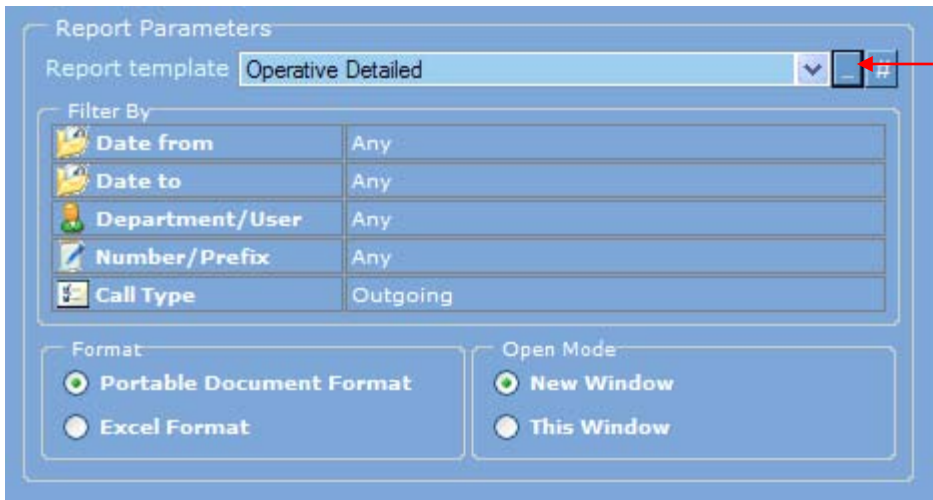
The following sections describe how to create (copy), modify and delete a report template.

6.3.1 Creating/Modifying a Report Template

Call Accounting Mate contains a comprehensive set of reports. Sometimes users require a specific report that is either not available or requires an existing report to be modified to achieve the desired results. Users can utilize the Report Template tool to create the desired report. Lets assume you company requires a report listing all of yesterday's calls placed by the sales department. If you are only generating this report once then it may be easier to use an existing report with its date filter options set to yesterday. If you need to generate this report daily then you would have to repeat this step every day. Creating a new report template with its date filter set to yesterday and its department filter set to sales would be much easier. Use the following steps to create/modify a new report template.

1. Launch and log into the CAM software (see Starting Call Accounting Mate).

2. Select the **List** item from the **Reports** menu. Next click and expand the plus (+) sign located to the left of the desired report group (i.e. **User Report** group). Next, select the desired flexible report from this expanded report group. The Report Parameters options should now be visible on your screen.

If the **Report Parameters** options are not visible then the selected report is not a flexible report. Please select a different report.

3. Use the Report Template drop down list box to select the report template you wish to copy or modify. If you wish to create a new template you must first select an existing template. Next, press the first button located to the right of the drop down list box to access the **Report Template** editor.

4. Created a new report template by pressing either the **New** or **Copy** button located on the bottom of the Template tab (shown above). If you pressed the copy button the template tool will create an exact

copy of the report template you selected in step 3. The Report Template dialog should now display the following.

Use the **Name** option to assign a name to a report template. The name option is a comment only and has no impact on how the report template will function. We recommend you use a name that makes it easy for you to remember what your report template does. For our example lets use the name "Sales Department Calls from Yesterday"

Use the **Description** option to provide a detailed description of what this report template does. For our example lets use "This template includes only the sales department calls from yesterday in the report."

Use the **Report Type** drop down list box to specify if the report template generates either a **Detailed** or **Summary** report. A detail reports displays each phone calls satisfying the report template's Filter requirements. Whereas a summary report contains summarized call information (i.e. total calls, minutes, cost, etc.)

Check the **Put into view list** option to have this template added to the list of views available on the Call Accounting **Views** menu. The user will be able to execute this report template by simply clicking this item on the views list menu.

Check the **Put into report list** option to have this template added to the Reports menu. If the Report Type was set to **Detailed** then the report will be added to the **Detailed Custom Report** group. If the Report Type was set to **Summary** then the report will be added to the **User Report** group. You have now added a new report to the Reports menu. The user can generate this report by expanding the appropriate report group and locating and clicking the report template name.

5. Next click the report template's **Filter** tab to specify which calls will be included in the report (see Report Template Filters).

6. Next, click the report template's **Order** tab to specify the how the data on the report is organized (i.e. sorted by date, time, call duration, etc.- see Report Template Order).

7. Next, click the report template **Columns** tab to identify what information will be displayed on the report (i.e. date, time, digits dialed, extension, user, department, total calls, total duration, average duration, etc. – see Report Template Columns).

8. Next, click the report template **Grouping** tab to organize your report summary information into groups (see – Report Template Grouping). For example you can use this option to organize your summary report by department (i.e. display summary information for all extensions in the sales department, followed by all extensions in the support department). Please note the Grouping tab will only be visible if the **Report Type** option on the Template tab was set to Summary.

9. Press the **Update** button to record your changes. You have now created/modified a report template.

The newly created/modified report template can now be utilized to generate a detailed or summary report. Generate your report by expanding the Custom Report Builder option on the report menu. Next, select either the "**::Custom Report Builder::**" (for a detailed report) or **"::Summary Report Builder::"** (for a summary report) menu item. Finally select the desired report template from the Report Generator drop down list box and then press the **OK** button. The report will be generated and displayed on your screen.

6.3.2 Deleting a Report Template

Call Accounting Mate contains a comprehensive set of reports. The built-in report template tool can be used to create / modify custom reports (see Creating/Modifying a Report Template). This flexibility allows you to create an unlimited number of reports. Report templates should only be created if the report you require needs to be generated again and again. Creating unnecessary or too many report templates makes it difficult for users to find the report they would like to generate. Use the Report Template delete option to remove old or unused report templates from the CAM software. Use the following steps to delete a report template.

1. Launch and log into the CAM software (see Starting Call Accounting Mate).
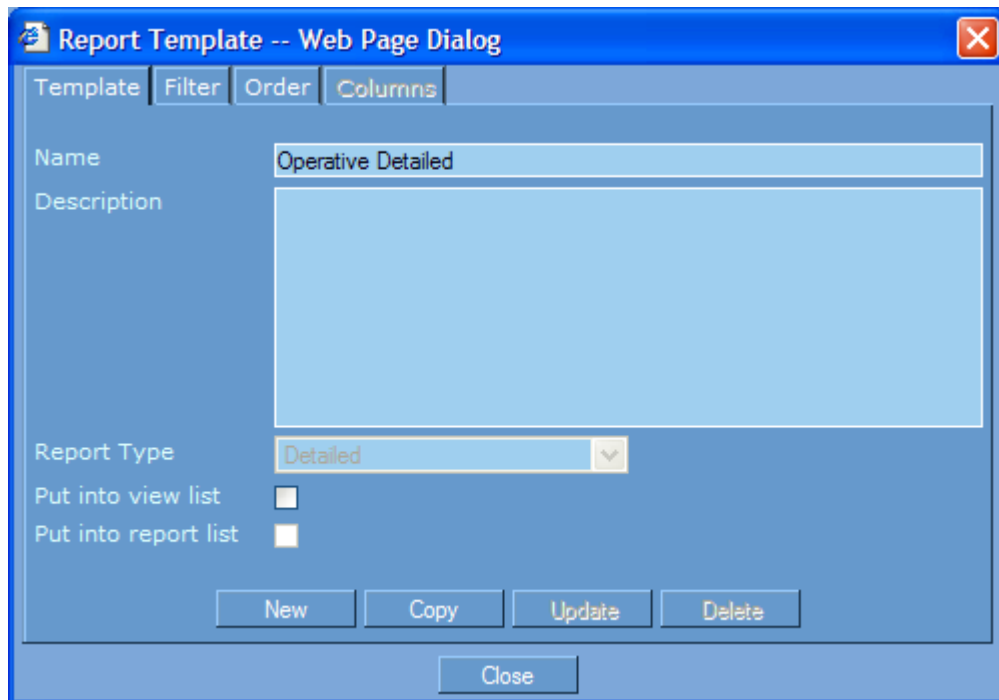
2. Select the **List** item from the **Reports** menu. Next click and expand the plus (+) sign located to the left of the **Custom Report Builder** group. Next, select either the **Custom Report Builder (Enhanced)** (for a detailed report) item or **the Summary Report Builder** (for a summary report) option. The Report Parameters options should now be visible on your screen.

3. Use the **Report Template** drop down list to select the report you would like to delete. If the report is not available then repeat step 2 but select the alternative report builder style. For this example lets assume we want to delete the "Sales Department Calls from Yesterday" report template.

4. Press the first button located to the right of the drop down list. The Report Template editor dialog should now be visible on your screen.
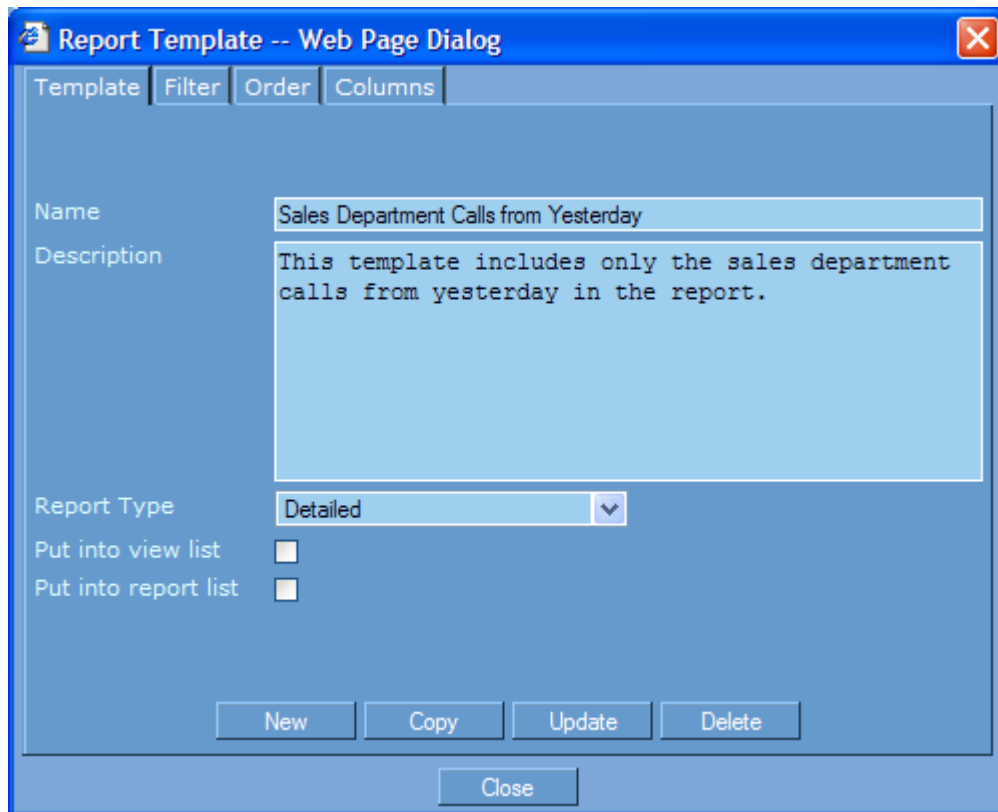
5. Press the **Delete** button to permanently remove the report template. A confirmation dialog confirming your deletion request should now be visible on your screen.
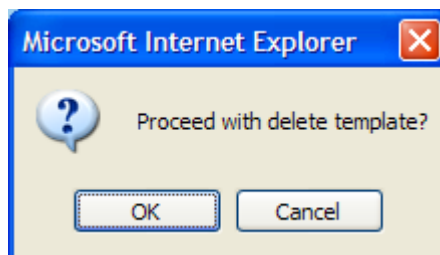
Press the OK button to delete the report template. Press the Cancel button to abort the deletion operation.

6. You have now successfully deleted a report template.

6.3.3 Report Template Filters

Call Accounting Mate utilizes Report Templates to generate most of its available reports. A report template is comprised of up to four components (filter, sort order, report columns and grouping) each of which can affect a report's content. Users can either modify an existing report template or create new ones to meet their reporting needs (see Creating/Modifying a Report Template). The following section details how to use report template **Filter** tab.

A report template filter is a database query. The template filter is utilized by CAM to determine which calls are included in a report. For example, to generate a report to display all outgoing calls from extension 221 costing $1.00 to $10.00 use the following steps.

1. Launch and log into the CAM software (see Starting Call Accounting Mate).

2. Select the **List** item from the **Reports** menu. Next, click and expand the plus (+) sign located to the left of the desired report group. For example to generate an extension report click the plus (+) sign located to the left of the **Extension** report group.

3. Next, select the desired report from the selected report group. For example to generate an extension report displaying each call placed by an extension select the **Detailed Report (Flexible)**. The Report Parameters options should now be visible on your screen.

Please note not all reports utilize report templates. If the Report Parameters screen pictured above is not visible on your screen then the report you selected does not utilize report templates (please select an alternative report).

4. Select the desired report template name from the Report template drop down list. If you are creating a new report template then you must select an existing template first (see Creating/Modifying a Report Template). For this example lets assume we are using the "**Operative Detailed**" template.

5. Press the first button located to the right of the report template (Operative Detailed) drop down list box. The **Report Template Web Page** dialog should now be visible on your screen.

6. Next, press the **Filter** tab located on the top of the report template dialog. The Filter options should now be visible on your screen.

7. Next, click the **Date from** filter item. You should now be able to edit the **Date from** filters **Value/Default** column.

Template	Filter	Order	Columns		
	Type		Value/Default		?
	Date from ▼		<Ask User>	... ▼	✓ ▲
☐	Date to		<Ask User>		+
☐	Department/User		<Ask User>		+
☐	Number/Prefix		<Ask User>		+
☐	Call Type		Outgoing		−

Save   Cancel

Close
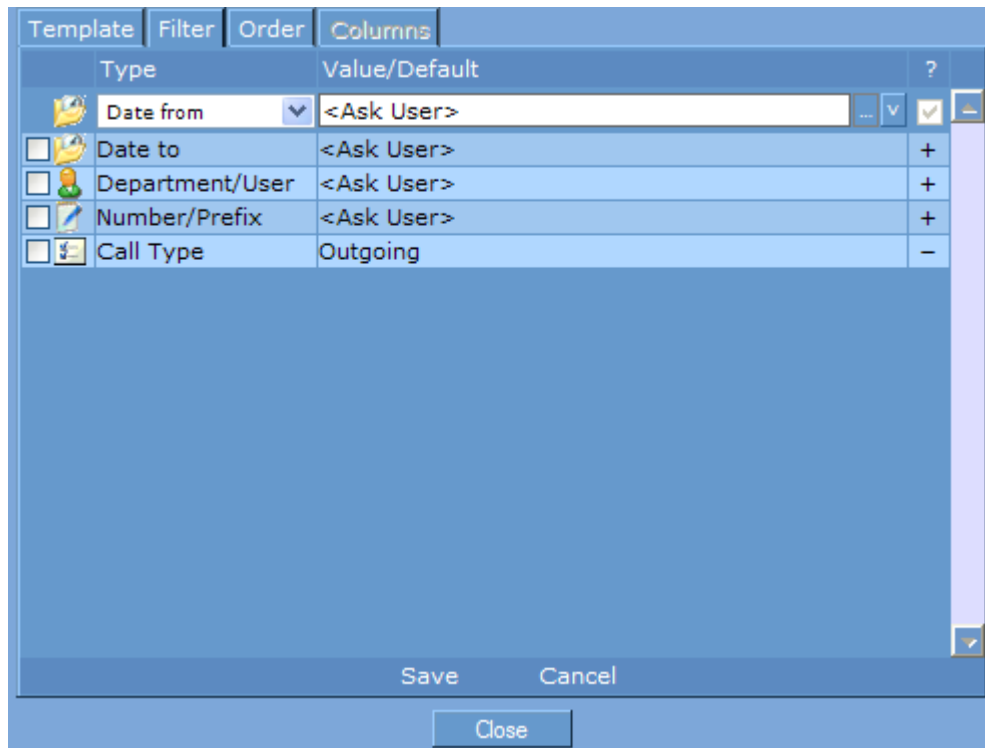
8. Press the button containing three dots located to the right of the **<Ask User>** value. A calendar should now be visible on your screen.

Date Picker -- Web Page Dialog						
September 2006		September ▼		2006 ▼		
Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7
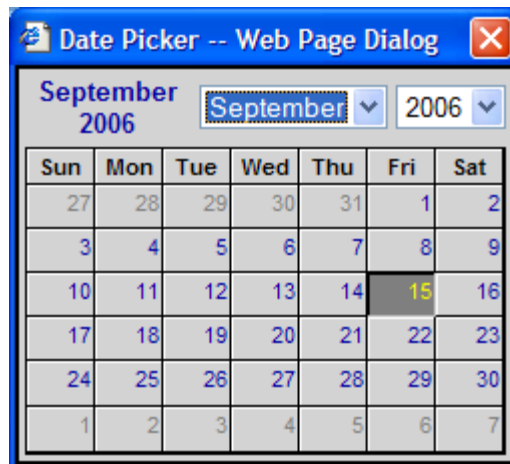
By default the calendar will have the current date highlighted (i.e. September 15th). Click the starting date range of calls you would like included in the report. For example to see calls from yesterday in the report click September 14th (if today is September 15th). The date "09/14/2006" should now appear to the right of the **Date from** filter item.
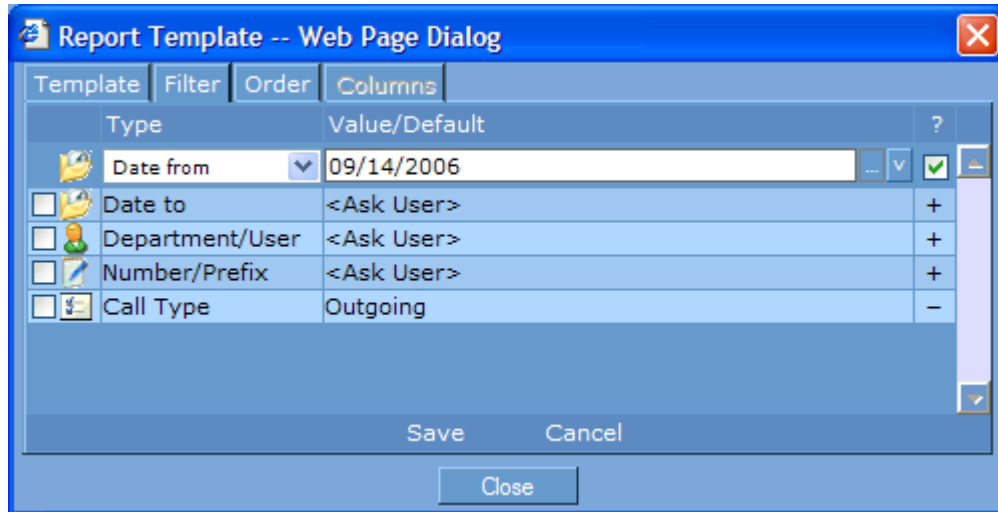
Note if this report is being generated daily using the above method requires you to manually modify the report template every day. For recurring report generation it may be best to use the filter's special values (i.e. Today, Yesterday, Week Ago, etc.). You can access a filter's special values by clicking the **v** button located to the right of the calendar button. A drop down list of available options should now be visible.
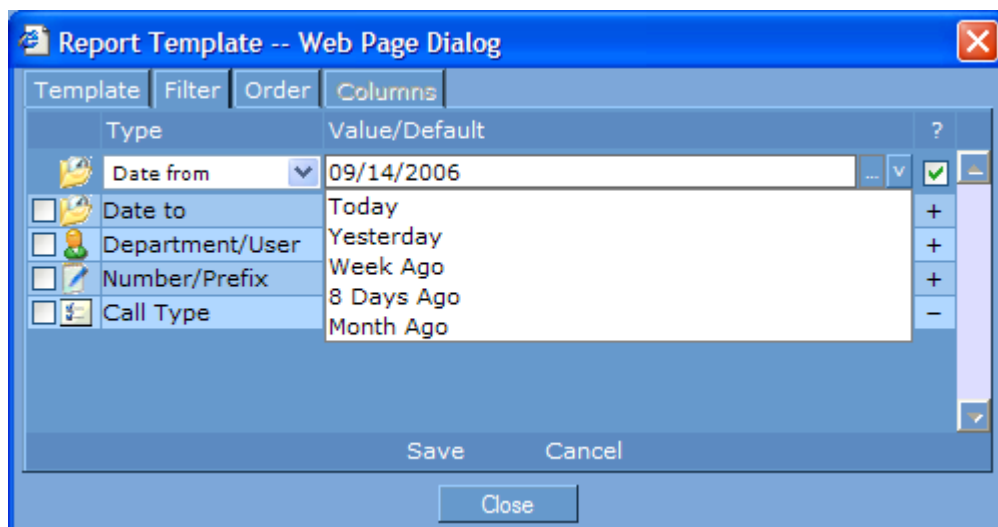
Select the required valued from the drop down list (i.e. Yesterday). The "Date from" filter value should now contain the text "Yesterday".
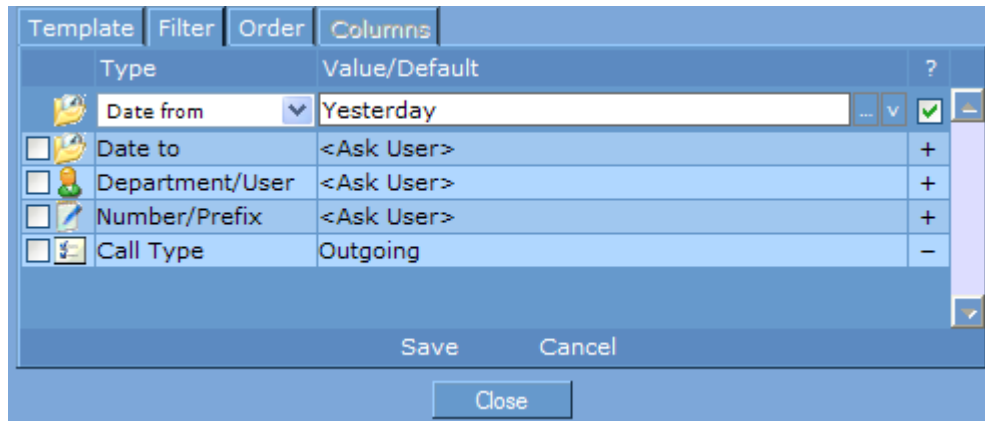
9. Press the **Save** button to store your filter **Date from** value. Repeat step 8 to set the **Date to** filter value to **Yesterday**. The Filter dialog box should now look as follows.
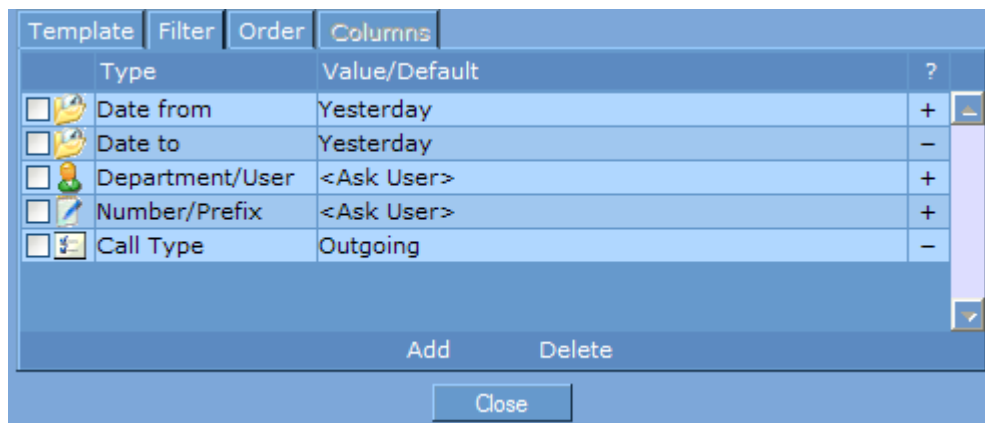
10. Next, click the **Department/User** filter option and then click the button to the right of the text **<Ask User>**. The **Select User(s) – Web Page Dialog** should now be visible.
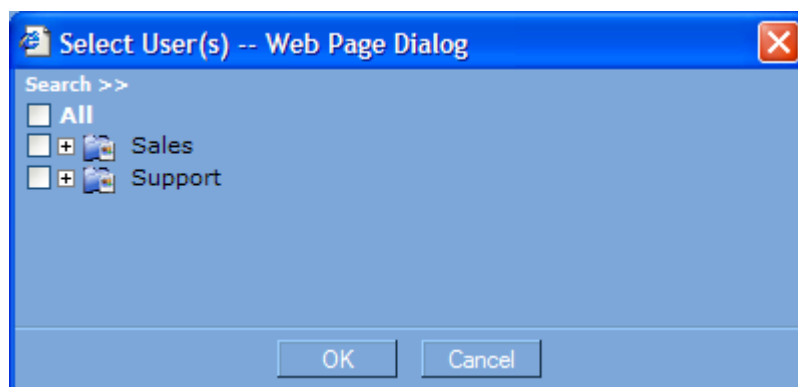
The above dialog will contain a list of your departments and users you previously entered into the CAM Department/Users database. If this information has not been provided then this dialog will contain only the **All** option (proceed to step 13). You can access the Department/Users database by selecting it from the **Maintenance** menu.

11. Click and expand the plus sign (+) located to the left of the department name containing the desired extension to include in the report. Next click the check box associated with the extension(s) you wish to include in the report (i.e. 221 Mary Jones).

12. Press the **Ok** button and then the **Save** button to save your filter settings. The Filter dialog should now resemble the following
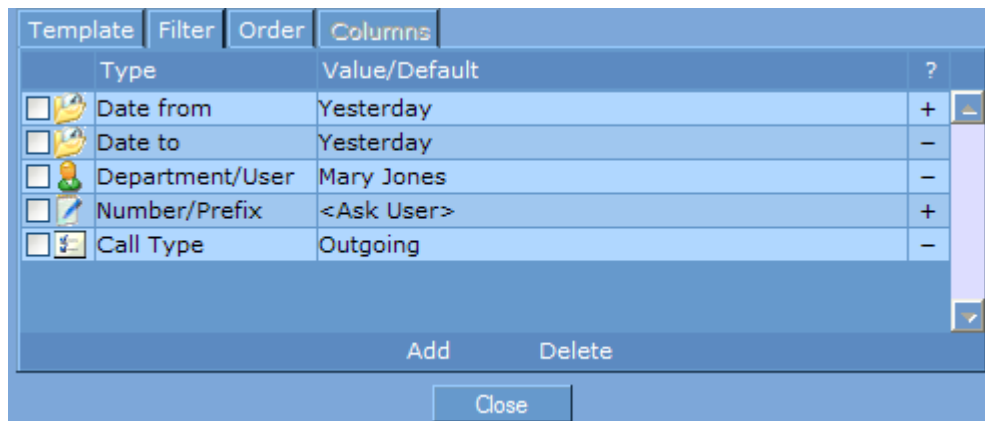
Skip ahead to step 14.

13. Press either the **OK** or **Cancel** button to exit the Select User(s) Web Dialog button. The Department/User filter type show now be contained within a drop down list box (if not click it). Click the drop down list box to reveal a list of available filter options. Select the **User Ext** option. The text "<Leave it blank or ask user>" should now be visible in User Ext's Value/Default option. Replace this text with the list of extensions, separated by commas, you wish to include in the report (i.e. 221). Press the **Save** button to record your changes.

14. Next, lets add a cost filter that includes only calls costing between $1.00 and $10.00 on the report. Press the **Add** button located on the bottom of the filter dialog. A new line with the filter type set to **CO Line** should now appear at the bottom of the filter list.
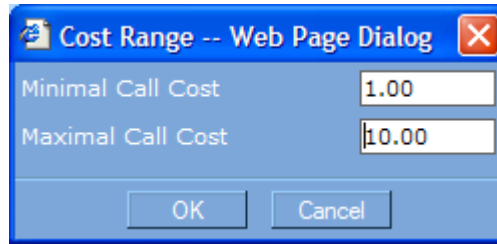
15. Click the Type drop down list box and change the filter type from **CO Line** to **Cost Range**.

16. Next, click the button located to the right of the Value/Default text **<Leave it blank to ask or press […] to fill>**. The **Cost Range – Web Dialog Page** should now be visible on your screen.

Set the Cost Range values to select which calls are to be included in the report. For example to include only calls costing between $1.00 and $10.00 set the **Minimal Call Cost** to 1.00 and the **Maximum Call Cost** option to 10.00.

17. Press the **OK** button and then the **Save** button to store your filter values. The filter dialog should now resemble the following.

You have now successfully created a filter to include only outgoing calls from extension 221 made yesterday costing between $1.00 and $10.00. Repeat the steps presented here to create customize any report template to generate reports tailored to your specific requirements.

6.3.4 Report Template Order

Call Accounting Mate utilizes Report Templates to generate most of its available reports. A report template is comprised of up to four components (filter, sort order, report columns and grouping) each of which can affect a report's content. Users can either modify an existing report template or create new ones to meet their reporting needs (see Creating/Modifying a Report Template). The following section details how to use the report template **Order** tab to change the sort order of the call information appearing on a report.

The report template order settings are utilized to determine the order call information is presented on a report. For example, to generate a report displaying all calls meeting the report template filter in ascending date and time order then use the following steps.

1. Launch and log into the CAM software (see Starting Call Accounting Mate).

2. Select the **List** item from the **Reports** menu. Next, click and expand the plus (+) sign located to the left of the desired report group. For example to generate an extension report click the plus (+) sign located to the left of the **Extension** report group.

3. Next, select the desired report from the selected report group. For example to generate an extension report displaying each call placed by an extension select the **Detailed Report (Flexible)**. The Report Parameters options should now be visible on your screen.

Please note not all reports utilize report templates. If the Report Parameters screen pictured above is not visible on your screen then the report you selected does not utilize report templates (please select an alternative report).

4. Select the desired report template name from the Report template drop down list. If you are creating a new report template then you must select an existing template first (see Creating/Modifying a Report Template). For this example lets assume we are using a report template that was previously created (i.e. "**Operative Detailed**" template).

5. Press the first button located to the right of the report template (Operative Detailed) drop down list box. The **Report Template Web Page** dialog should now be visible on your screen.
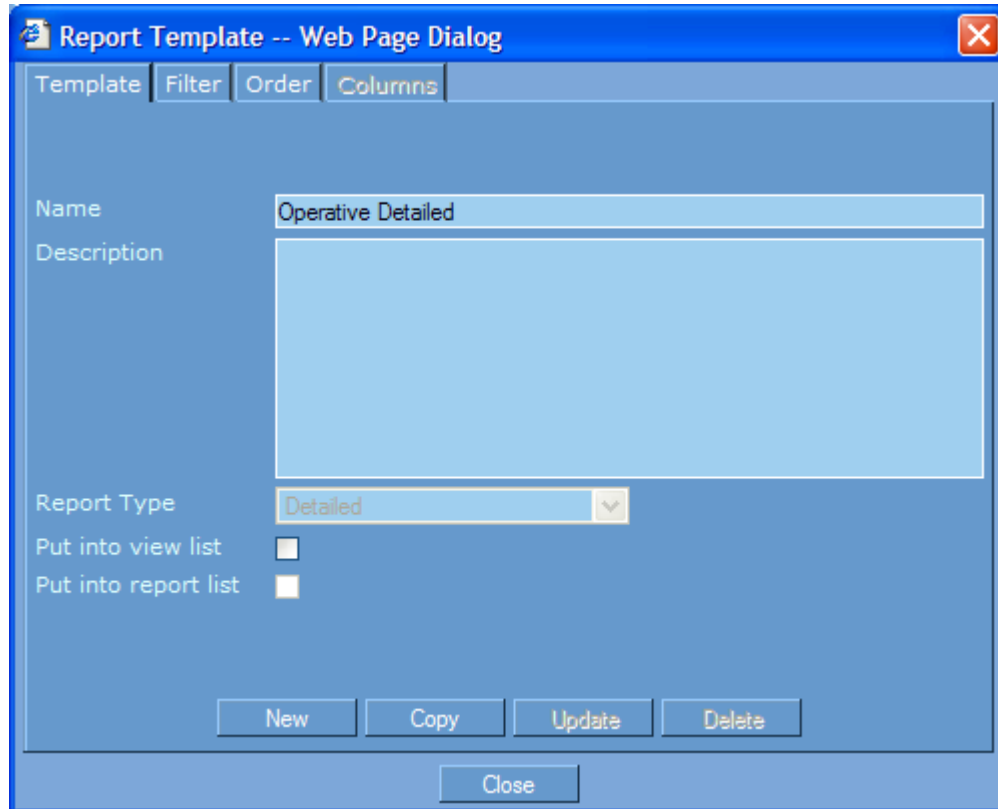
6. Next, press the **Order** tab located on the top of the report template dialog. The Order options should now be visible on your screen.
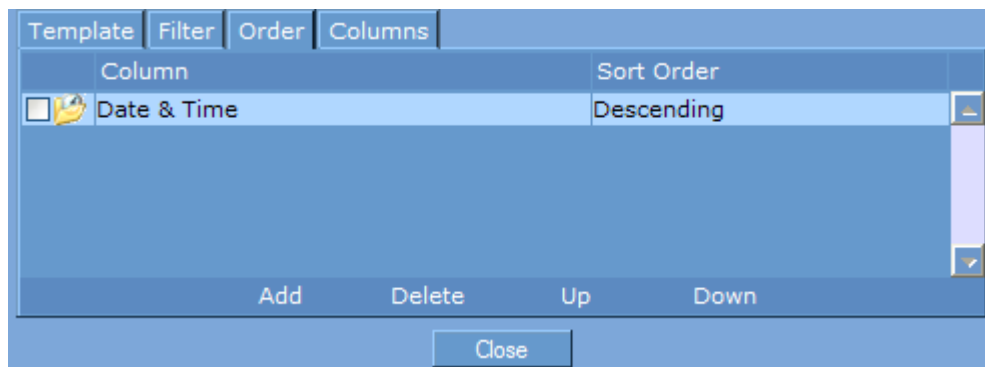
7. The default order options on most report templates is Column set to **Date & Time** and Sort Order set to **Descending**. This sort order results in the report displaying the calls in chronological order from most recent to oldest. For example, if your database contains calls from January 1st to Septemeber 30th the first call on the report will be from September 30th and the last call will be from January 1st. Reverse the sorter order by clicking the word **Descending** located below Sort Order. A drop down list box should now be visible on the screen. Click **Descending** a second time and a list of available sort orders will be displayed.
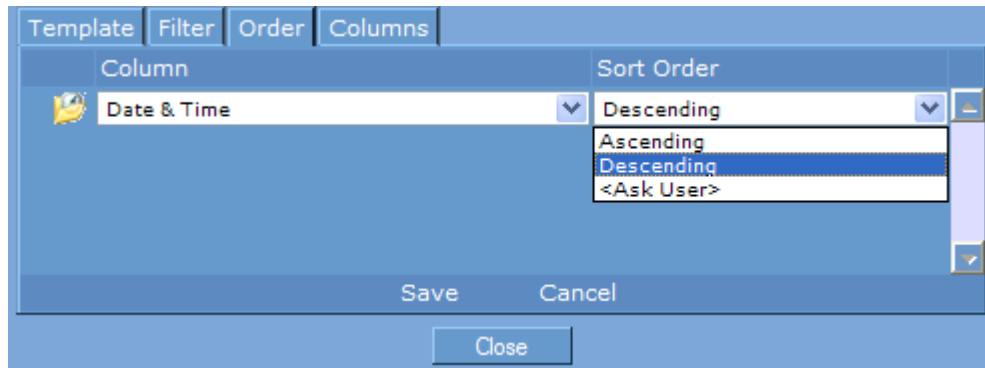
Now click the **Ascending** option. Next press the **Save** button to record your sort order changes. The Order tab should now resemble the following.
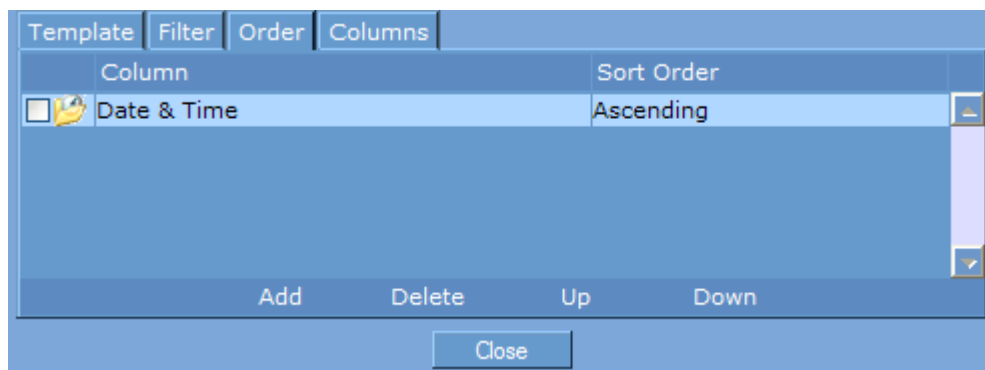
Please note setting a sort order to **<Ask User>** will allow the user to set the sort order to either ascending or descending at report generation.

The Order Tab can contain one or more sort orders. For example, you can add a second sort order to determine the order calls are displayed on a report when their date and time are identical. If you would like the call with the longer duration to be displayed first then follow the directions in step 8. If you require only one sort order then skip ahead to step 9.

8. Press the **Add** button located on the bottom of the Order tab. A new line should appear below the Date & Time line. Click the drop down list box below the column item and select the **Duration** item. Next click the drop down list below the Sort Order column and select the **Descending** item. Press the **Save** button to record your changes. The Order tab should now resemble the following.

---
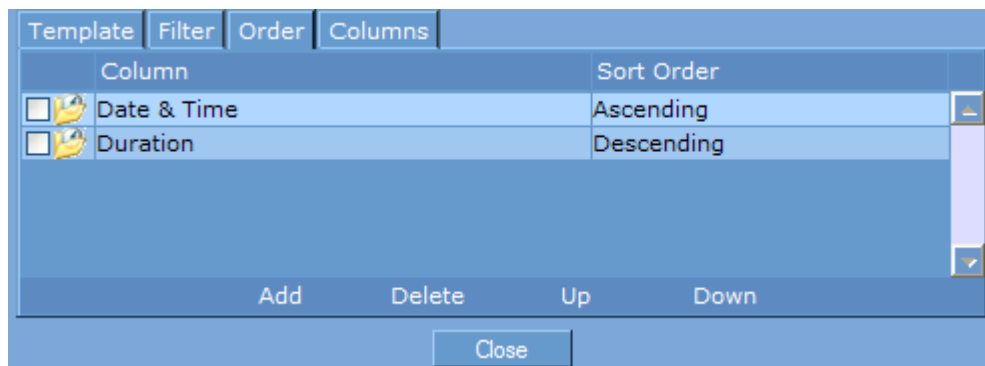
9. Finally press the Close button to exit the Report Template editor.

The new report template can now be utilized with any detailed report. Simply select the desired report, then click the Report Template drop down list and then select the new/modified report template.

Please note the sort order options available on a summary report template may differ than those shown above.

6.3.5 Report Template Columns

Call Accounting Mate utilizes Report Templates to generate most of its available reports. A report template is comprised of up to four components (filter, sort order, report columns and grouping) each of which can affect a report's content. Users can either modify an existing report template or create new ones to meet their reporting needs (see Creating/Modifying a Report Template). The following section details how to use the report template **Columns** tab.

The report template Columns settings are utilized to select the call information (i.e. date, time, duration, number dialed, user/extension, etc) to be displayed on the report. Use the Columns settings to modify the appearance of an existing report or to create a new report. For example, to create a report displaying the date, time, user/ext duration, number dialed and cost of each call use the following steps.

1. Launch and log into the CAM software (see Starting Call Accounting Mate).

2. Select the **List** item from the **Reports** menu. Next, click and expand the plus (+) sign located to the left of the **Custom Report Builder** group. Note the report template columns tab may not be accessible from other report groups).

3. Next, select the desired report from the selected report group. For example to create/modify a detailed report select the **::Custom Report Builder (Enhanced)::** option. Alternatively to create/modify a summary report select the **::Summary Report Builder::** option. For our example we need to select the Custom Report Builder (Enhanced) option. The Report Parameters options should now be visible on your screen.


Please note not all reports utilize report templates. If the Report Parameters screen pictured above is not visible on your screen then the report you selected does not utilize report templates (please select an alternative report).

4. Select the desired report template name from the Report template drop down list. If you are creating a new report template then you must select an existing template first (see Creating/Modifying a Report Template). For this example we will create a new report template based on a previously created template (i.e. "**Operative Detailed**" template).

5. Press the first button located to the right of the report template (Operative Detailed) drop down list box. The **Report Template Web Page** dialog should now be visible on your screen.

6. Next, press the **Copy** button located on the bottom of the Template tab. The Name box should now contain the text **Operative Detailed (copy #)**. Change this text to **My First Report Template** and then press the **Update** button. You have now created a new report template. Note if you were creating a Summary report you must change the **Report Type** setting to Summary.

7. Next, press the **Columns** tab located on the top of the report template dialog. The Columns options should now be visible on your screen.
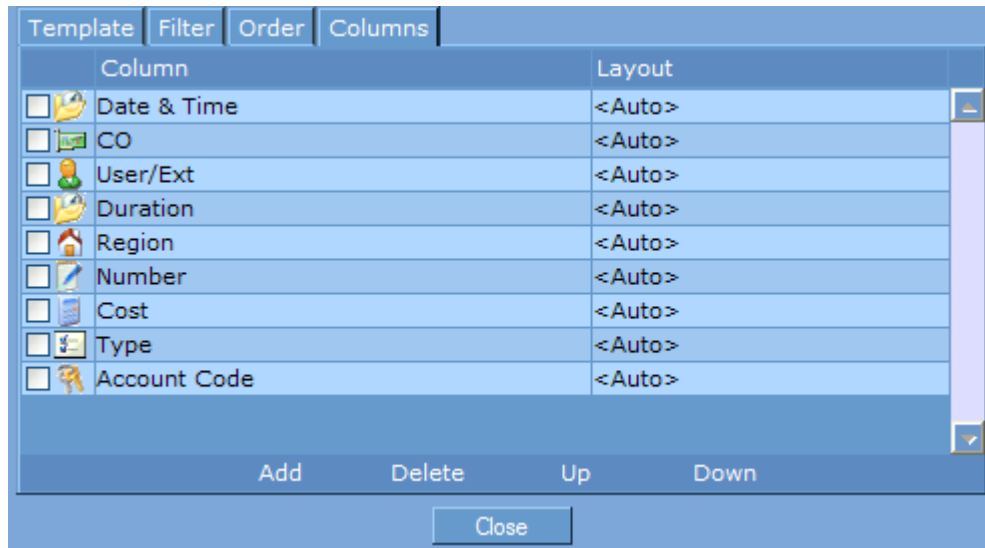
8. Check the columns you would like to remove from the report. For this example the report should contain only the Date & Time, User/Ext, Duration, Number and Cost columns. After checking the columns you would like removed the Columns tab should resemble the following.
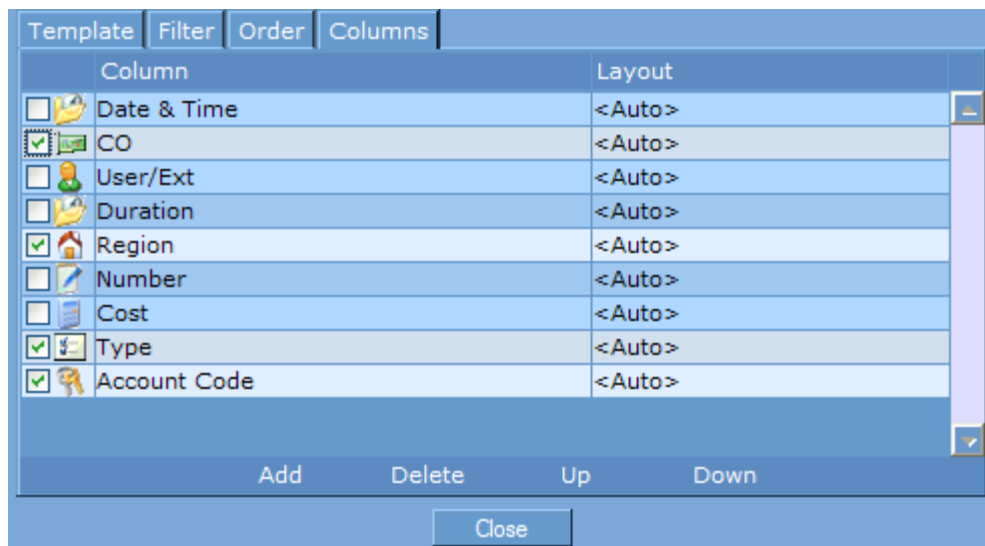
Press the **Delete** button to remove all the checked columns from the report. The Columns tab should now resemble the following
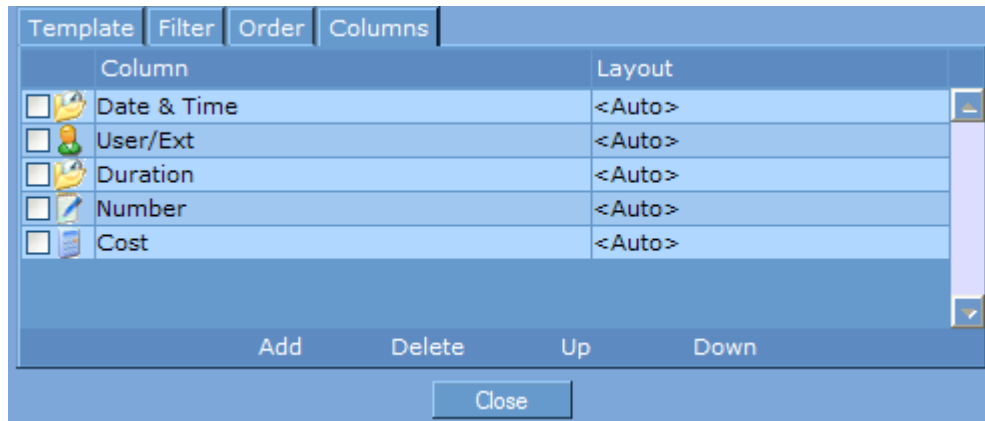
You can change the order of the columns by checking the box to the left of the column name and then pressing either the **Up** or **Down** button.

You can add a column to a report by pressing the **Add** button. A new line will appear at the bottom of the column list. Use the drop down list to select the column you wish to add to the report. Press the **Save** button to add the new column to the report template.

The new report template can now be utilized with any detailed report. Simply select the desired report, then click the Report Template drop down list and then select the new/modified report template.

Please note the column options available on a summary report template may differ than those shown above.

6.3.6 Report Template Grouping

Call Accounting Mate utilizes Report Templates to generate most of its available reports. A report template is comprised of up to four components (filter, sort order, report columns and grouping) each of which can affect a report's content. Users can either modify an existing report template or create new ones to meet their reporting needs (see Creating/Modifying a Report Template). The following section details how to use the report template **Grouping** tab. Please note the Grouping tab will only be visible on report templates whose Report Type is set to Summary.

The report template Grouping settings are utilized by CAM to organize how summary information is presented in a report. Use the following settings to modify a report template Groupings tab.
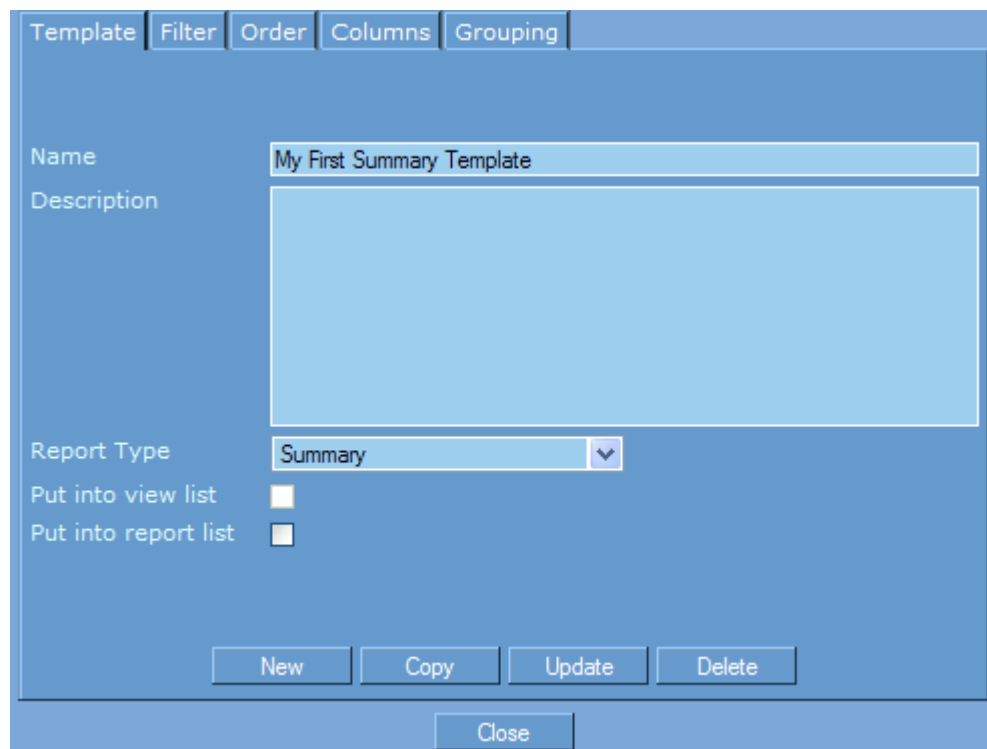
1. Launch and log into the CAM software (see Starting Call Accounting Mate).

2. Select the **List** item from the **Reports** menu. Next, click and expand the plus (+) sign located to the left of the **Custom Report Builder** group. Note the report template Grouping tab may not be accessible from other report groups).

3. Next, select the **::Summary Report Builder::** option. The Report Parameters options should now be visible on your screen.

Please note not all reports utilize report templates. If the Report Parameters screen pictured above is not visible on your screen then the report you selected does not utilize report templates (please select an alternative report).

4. Select the desired report template name from the Report template drop down list. If you are creating a new report template then you must select an existing template first (see Creating/Modifying a Report Template). For this example we will modify a previously created template (i.e. "**My First Summary Template**").

5. Press the first button located to the right of the report template (My First Summary Template) drop down list box. The **Report Template Web Page** dialog should now be visible on your screen.

6. Next, press the **Grouping** tab located on the top of the report template dialog. The Grouping options should now be visible on your screen.
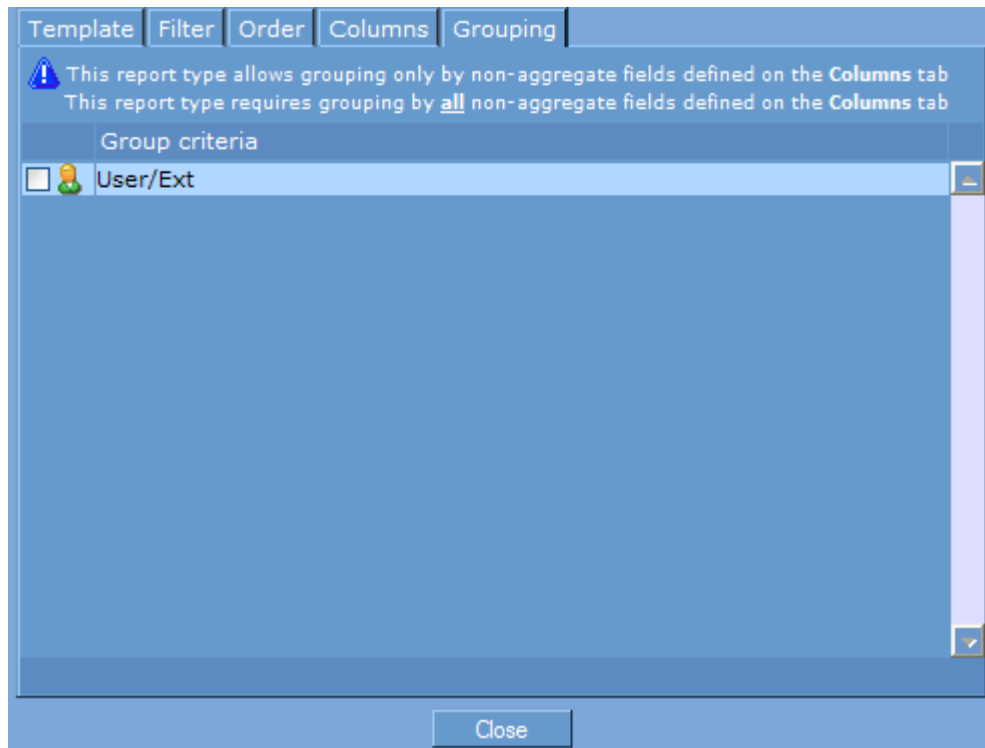
Grouping options vary depending on the fields included in a report. Note: You cannot add or delete report groupings. If more than one group option exists then you can change an item by clicking on its text and then using its drop down list box to select a different item.

The new report template can now be utilized with any summary report. Simply select the desired report, then click the Report Template drop down list and then select the new/modified report template.
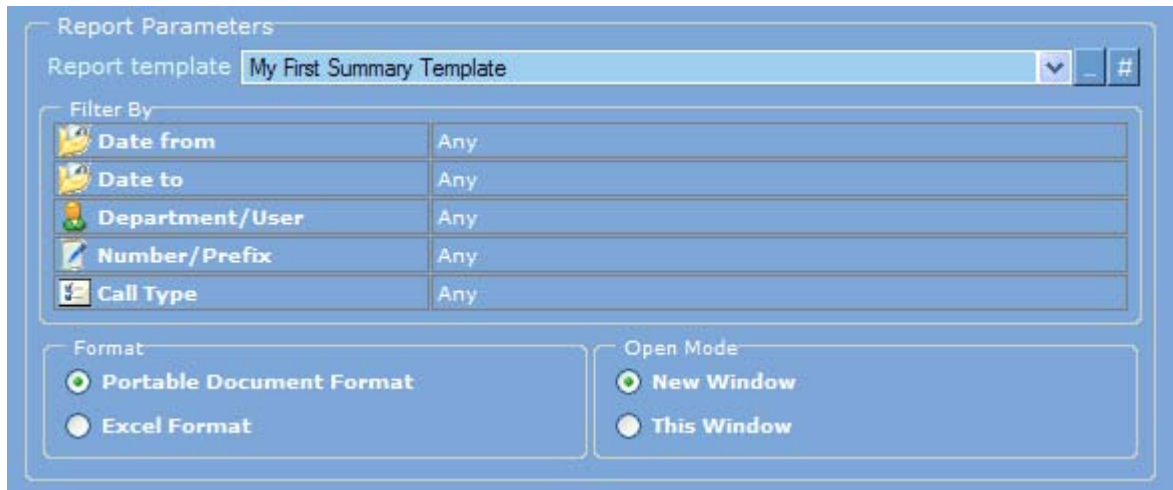
6.4 Scheduling Report Generation

The Call Accounting Mate **Task Scheduler** can be utilized to automate the generation and delivery of reports. The task scheduler can schedule the reports to be generated every x minutes, hours, days, weeks or months. The completed report can be automatically emailed to one or more recipients. Please note the task schedule can only be utilized with Call Accounting Mate's Flexible Reports (i.e. it does not support scheduled generation of Easy Reports).

Access the Task Scheduler by selecting the **Task Scheduler** menu item from the **Administration** menu. The Task Scheduler configuration window is pictured below.

6.4.1 Adding/Modifying a Task

A unique task must be created for each report you wish to generate with the CAM Task Scheduler. Use the following steps to create or modify a task.

1. Add a task by pressing the **Add** button located at the bottom of the screen. Modify an existing task by clicking on it. If you pressed the add button a new task item will be visible in the task list. If you clicked an existing task its background color will change to white indicating it can now be edited.

2. Use the **Type** drop down list box to select the type of task you wish to create. Set this option to **Report Alert** to schedule a new report. Alternatively, you can set this option to **Event Alert** to generate a email event each time a call matching a user specified filter criteria is met (i.e. a 911 call to emergency services).

3. Use the **Description** box to associate a comment with the task you are creating. The description box can contain any value. It does not impact the scheduled task. Specify a description that easily identifies what the task is doing. For example if the task is generating a weekly report for your sales department then set this field to Weekly Sales Report.

4. Use the **Processor** drop down list box to select the report category of the scheduled report you wish to execute. This option is only accessible when the Type option is set to Report Alert. Possible values for are: Custom Report (Enhanced), Custom Summary Report, Detailed User Report, Detailed Department Report, Grouped Contacts Report, Detailed Contacts Report, etc. If you are attempting to schedule a report using a custom Report Template you previously created (see Creating/Modifying a Report Template) then you must set this option to either Custom Report (Enhanced) or Custom Summary Report. Select the Custom Report (Enhanced) option if the custom report template's Report Type is set to Detailed. If the template Report Type is set to Summary then use the Custom Summary Report option.

5. Use the **Template** drop down list box to specify the report template you wish to utilize. The report template **Filter By** options will determine which calls will be included in the report. You can modify the report template Filter By options by pressing the button with three dots (…) located to the right of the template name. After pressing this button the report template dialog box should be visible on your screen.

Modify the Filter options to identify the calls you wish to include in the scheduled report. For example, if you are generating a report to show all calls made yesterday then set the filter **Date from** and **Date to** option to Yesterday. Please note if you set the Date from and Date to options to yesterday when you created the report template then these options will not visible and the report will automatically select yesterday's calls. If you are unsure of the custom templates filter options then you can review them by modifying the report template (see Report Templates). For information on how to modify the filter options please see the Report Template Filters section of this guide.

Use the **Format** options to identify the report output format. Possible values are PDF (Portable Document Format) or Excel Format. Please note most reports do not support Excel format (even though the option may be visible). We recommend you set this option to PDF.

Press the **OK** button to save the changes to the template. Please note changes made here are only utilized by the scheduled task (i.e. the Report Template options used by the CAM Report menu will not be changed).

6. Use the **Schedule** option to specify when the report is to be generated. Press the button with three dots (…) located in the schedule field to display the scheduling options.
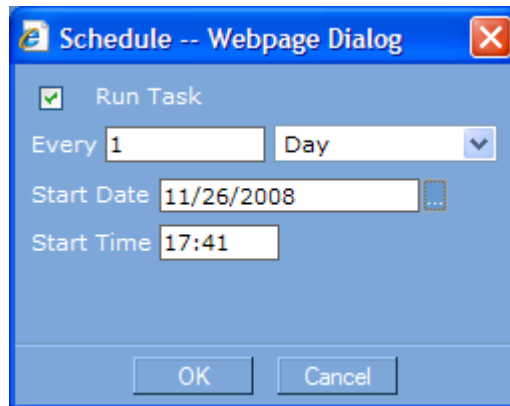
Check the **Run Task** option to activate the task. Uncheck this option to deactivate the task.

Use the **Every** options to specify how frequently the task is executed. Possible values are Minute, Hour, Day, Week, or Month. For example if you are generating this report once a day then set this value to Day (to generate the report weekly set this value to Week).

Use the **Start Date** option to specify the first date the task is to be executed. You can modify the start date value by either clicking on it and then using the backspace key or by pressing the button with three dots (…) to the left of the field. After pressing the button a calendar should be visible on your screen.
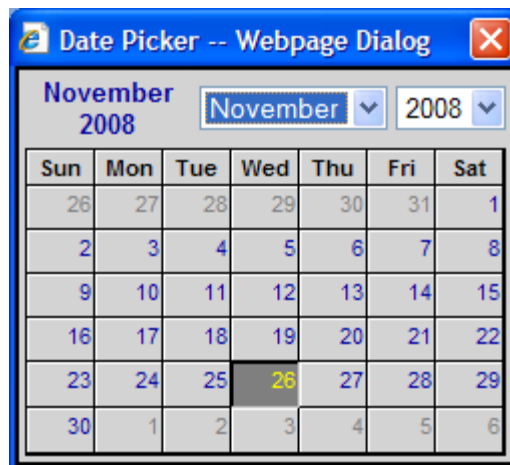
Use the Month and Year drop down boxes to select the desired starting month. Next click the desired start date. After clicking the desired date you will be returned to the Schedule dialog.

Use the **Start Time** option to identify the time the report is to be executed. You can modify this value by highlighting the current time and then pressing the backspace key. Please note the time format specified must utilize a 24-hour clock (i.e. 8:30 pm should be entered as 20:30).

Press the **OK** button to save your task execution schedule.

7. Press the **Save** button located at the bottom of your screen to schedule your new task. An example of a scheduled task is pictured below.
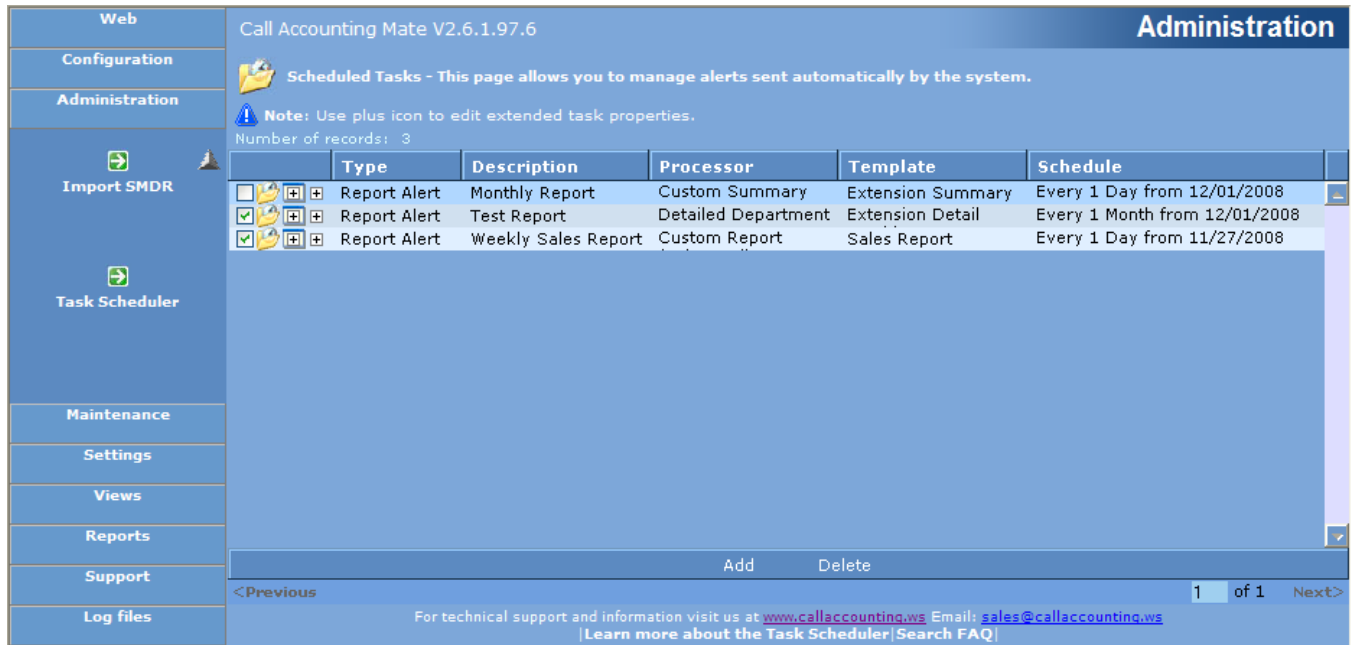
The above example schedules the Weekly Sales Report to be executed every day starting on November 27 at 12:05 am.

You have now successfully scheduled a report using the Task Scheduler. The report will be generated at the scheduled time and saved to the temporary report folder (c:\bill\html\temp - on the computer where the CAM software was installed). Please note the report will not be delivered to an email recipient. Please see the Emailing Scheduled Reports section of this guide for instructions on how to deliver the scheduled report to an email recipient.

6.4.2 Deleting a Scheduled Task

Tasks can be deleted by accessing the Task Scheduler from the Administration menu. Simply check the box to left of each task you would like to delete. The following screen depicts two tasks that have been selected for deletion.

Press the **Delete** button to remove the selected scheduled reports from the task scheduler. A prompt requesting confirmation of your deletion request will be displayed.
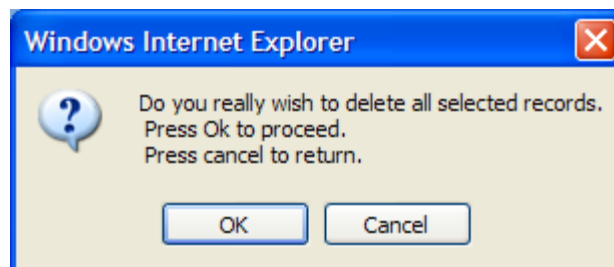
Press the **OK** button to delete the tasks. Press the **Cancel** button to abort the deletion request.

6.4.3 Emailing Scheduled Reports

The Call Accounting Mate task scheduler can be configured to deliver a scheduled report to one or more email recipients. Use the following steps to activate email delivery of a scheduled report.

1. Select the **Task Scheduler** option from the **Administration** menu.

2. Locate the task you wish to add email delivery of the report.

3. Click and expand the right most plus (+) sign associated with the task. The task scheduler window should now resemble the following.

4. Press the **Add** button located immediately below the expanded scheduled task selected in the previous step. A new entry will appear below the expanded task.

5. Set the **Property Type** drop down list box option to **Alert E-mail Subject**.

    The text entered into the **Property Value** option will be used as the Email Subject. Please enter a value that will make it easy for the recipient to identify the email. For example if the report generated by the scheduled task contains a list of calls made by each member of the Sales department then type the text "Weekly Sales Department Calls Report" into this field.

    The **Name/Description** field is optional and is not included in the email. We recommended you leave this field blank.

6. Press the **Save** button to save the Alert E-mail Subject details. The task scheduler screen should now resemble the following.

7. Press the **Add** button below the scheduled task again. A new entry should be added below the expanded task.

8. Set the **Property Type** drop down list box option to **Recipient E-mail Address**.

    Set the **Property Value** option to the email address of the recipient (i.e. jsmith@company.com). Please note this field must contain only one email address.

    The **Name/Description** field is optional. We recommended you set this field to the name of person associated with the email you entered into the Property Value box (i.e. John Smith).

9. Press the Save button to save the Alert E-mail Recipient details.

10. Repeat steps 8 and 9 for each additional email recipient you wish to add to the report email distribution list.

11. You have now successfully created an email subject and recipient list for distribution of your scheduled report.

The following example depicts a scheduled report that is to be emailed to two recipients.

Modify an email recipient or the email subject by clicking it and changing its corresponding Property value. **Delete** an email recipient and/or the email subject by checking the box located to the left of the desired item(s) and then pressing the **Delete** button.

You have now successfully configured a scheduled report to be delivered to one or more email recipients. Please note delivery of reports via email will not occur until the Call Accounting Email Settings have been configured (see Configuring Email Settings).

6.4.4 Configuring Email Settings
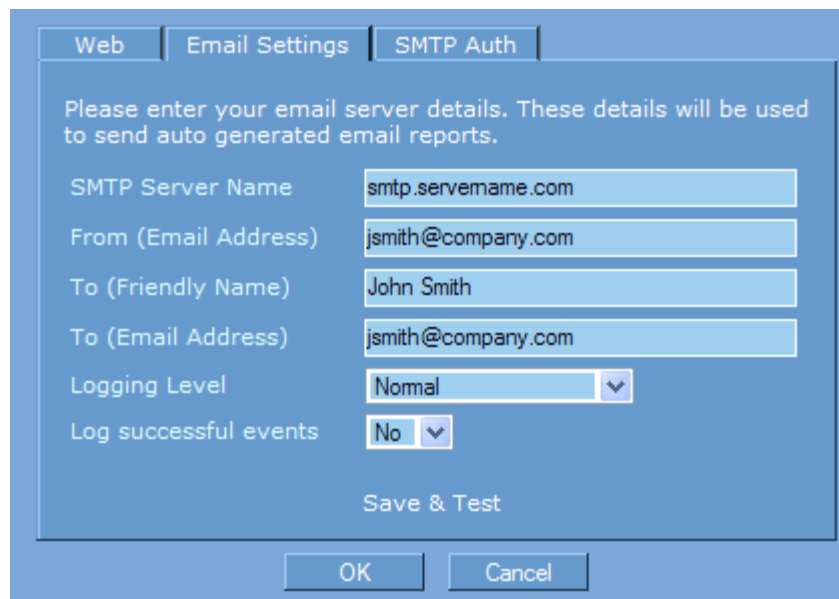
The Call Accounting Mate Task Scheduler can be configured to deliver reports via email (see Scheduling Report Generation). Users must provide CAM with the name of the email server and email account to be used for delivery of reports. Use the following steps to enter your email information.

1. Select the **Web Config** option from the **Configuration** menu. The Web Configuration options dialog will now be visible on your screen.

2. Click the **Email Settings** tab.

Set the **SMTP Server Name** option to the name of your SMTP mail server. Please note CAM does not support email servers that require a secure connection (i.e. utilize SSL). Most SMTP

servers utilize port 25. If you SMTP server utilizes an alternative port number then append a colon followed by the port number to the SMTP Server Name (i.e. smtp.servername.com:587)

3. Click the **SMTP Auth** tab.

Use the SMTP Auth tab to identify the type of authentication utilized by the your mail server.

Use the **SMTP Authentication** options if your email server utilizes SMTP authentication (typically most SMTP servers utilize SMTP Authentication). Next, check the **Use Authentication** option. Set the **User Name** box to the email account that will be used to log into the SMTP server (i.e. jsmith@company.com). Set the **Password** field to the password used to log into the SMTP server with the email account specified in the User Name field. Please note the password entered into this field will be masked as you type it (i.e. asterisks will be displayed).

Use the **Pop before SMTP** options if your email server uses POP. Next, check the **Use Pop Before SMTP** option. Type the name of your POP3 mail server into the **POP3 Server Name** box. Set the **User Name** box to the email account that will be used to log into the POP3 server (i.e. jsmith@company.com). Set the **Password** field to the password used to log into the POP3 server with the email account specified in the User Name field. Please note the password entered into this field will be masked as you type it (i.e. asterisks will be displayed).

4. Press the **OK** button to save your email settings. A prompt will be displayed asking you to confirm the password you entered into the Password box.
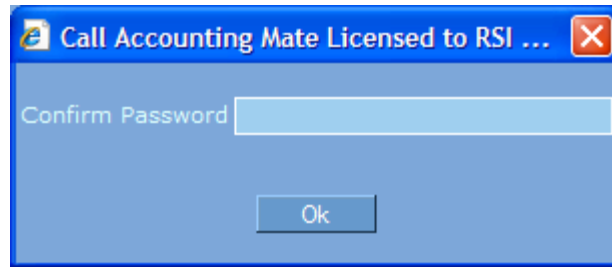
Re-enter the password and then press the **OK** button.

You have now successful configured your email settings.

6.4.5 Testing your Email Settings

The Call Accounting Mate Task Scheduler can be configured to deliver reports via email (see Scheduling Report Generation). Users must provide the software with the name of the email server and email account to be used for delivery of reports (see Configuring Email Settings). Use the following steps to verify your email configuration.

1. Select the **Web Config** option from the **Configuration** menu.

2. Click the **Email Settings** tab.

3. Press the **Save & Test** button to test your email settings. If the email settings are configured correctly the following confirmation message will be displayed.
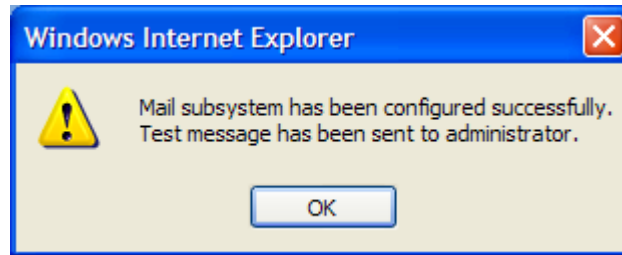
If the email settings are configured incorrectly an error message similar to the following one will be displayed.
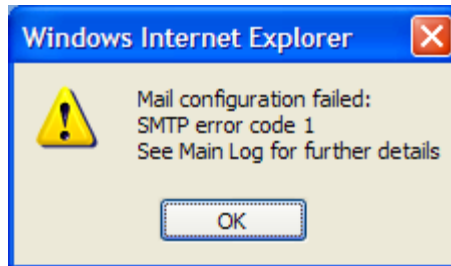
Verify and correct your email settings (see Configuring Email Settings) and then repeat the test. If you are unable to resolve your issue then please examine the Call Accounting Mate Main Log file (select the **Main** option from the **Log files** menu). The log file will contain diagnostic information that may assist you in resolving your problem. Note: Setting the **Logging Level** option on the Email Settings tab to **Detailed (SuperDebug)** will generate additional diagnostic information from your email test.

If you are unable to resolve your issue, please email a brief description of your problem and a copy of your c:\bill\billlog.txt file to support@callaccounting.ws.

You have now successfully configured your email settings. Reports generated by the Task Scheduler will now be delivered to each email address in the scheduled task's email recipient list.

6.5 Accessing the On-Line Manual (Help File)

The CAM software contains comprehensive on-line help. Consult this help system for details on how to use this software. The help system contains easy to follow instructions on how to configure your CAM Software, generate reports, perform maintenance functions and also how to trouble shoot problems encountered while using this software. You can access the help system by using one of the following methods.

1. Look for white text beginning at the bottom of the screens with the words '**Learn more about….**'. If these words are visible then clicking this item will access the on-line help system and display information related to the current screen. Please note, this type of help is not available on all screens. If this text does not appear use option 2 to access the help system.

2. Click the white text "**Search FAQ'** located at the bottom of the screen. The following window should be displayed.
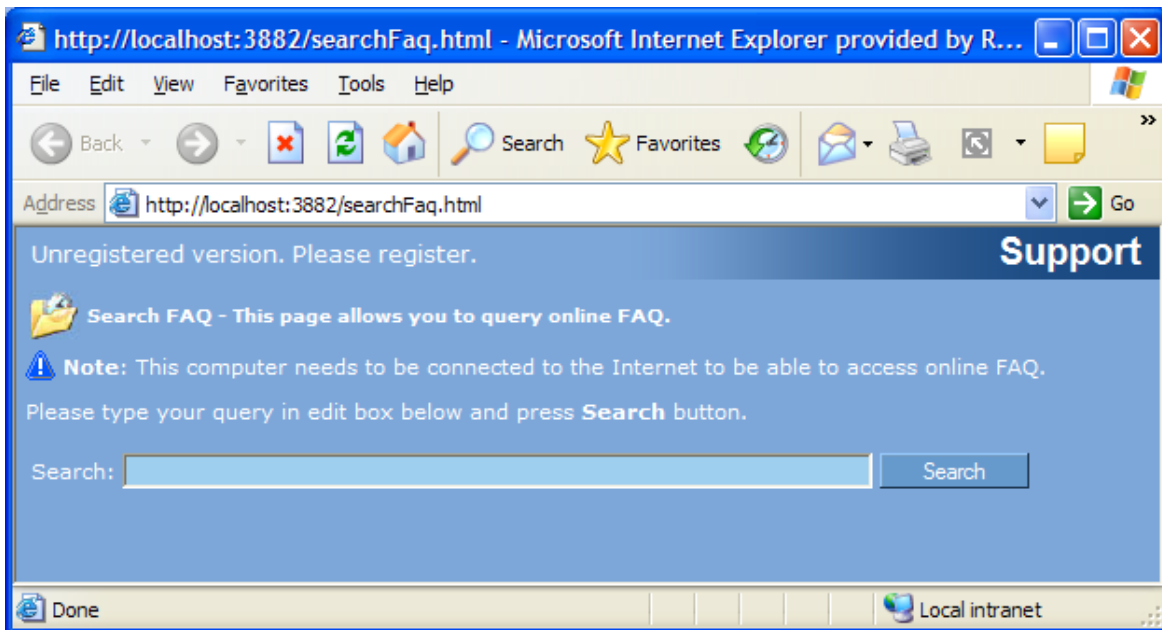
Enter a few words identifying the topic you require assistance on and press the Search button. The software will search our on-line knowledge base and display any matching results. Click any of the results to view additional details.

Please note your software must be registered with us before you are granted access to the knowledge base.

7.0 Installing CAM on a Second Computer

Our CAM software contains a built-in web server. This feature makes it possible to access the software from any computer located in your office (i.e. connected to your LAN/WAN). Remote desktops can access the software via Internet Explorer. No additional software needs to be installed on the client workstations/remote desktops. The software can operate simultaneously on as many desktops as you like without purchasing additional licenses. Only customers with a network will be able to operate this software on more than one computer. To use this software on more than one computer please use the following steps.

1. Start Internet Explorer on the second computer.

2. Type the following url into the Address box.

        http://ipaddress:port

    Set the IP address to the address of the computer where the CAM software is installed. Set port to the port number identified on the Web tab of the software's Web Config settings (click the Web Config icon on the Configuration menu).

3. Press enter or click the Go button located at the right end of the address bar. The CAM Web login screen should now appear
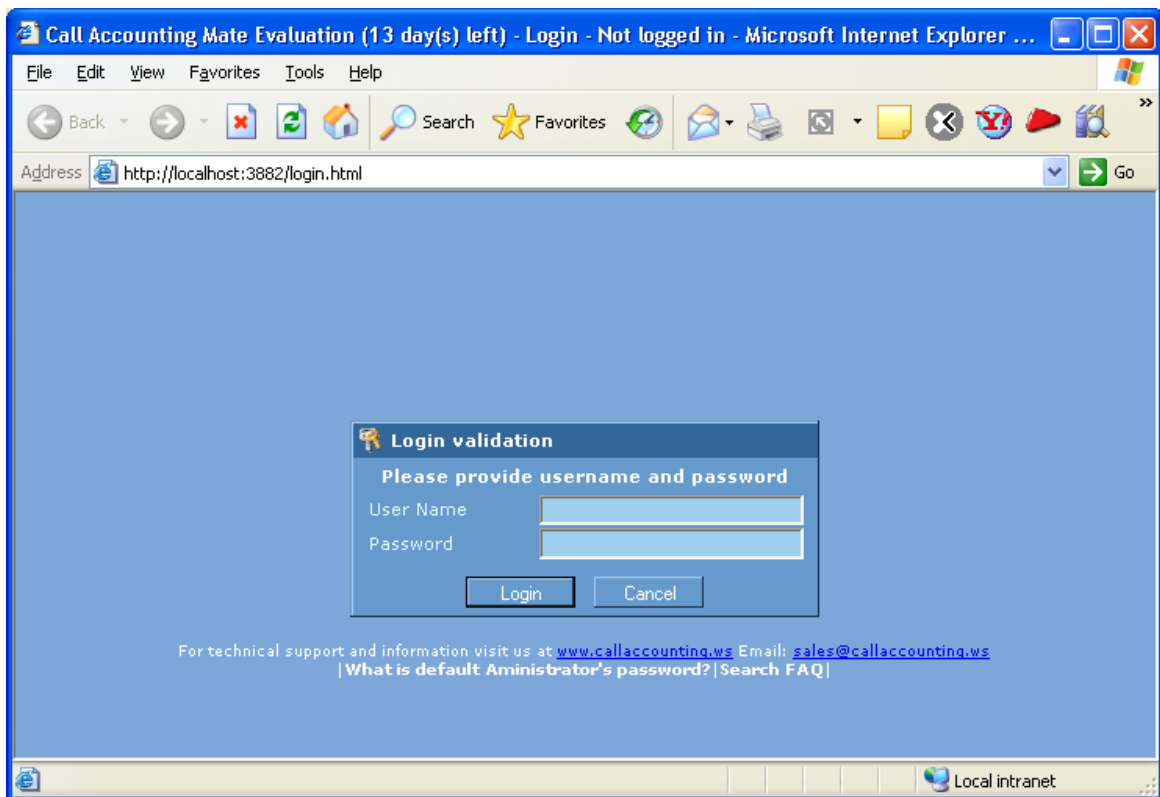
4. Enter a valid User Name and Password and press the Login button.

5. The CAM main screen should now be visible.

You have now successfully installed CAM on a second computer. Repeat steps 2-4 for each additional computer you will be installing the software onto.

8.0 Property Management Systems (PMS) Integration

Hotels/Motels utilize Property Management Systems (PMS) to maintain guest contact information, reservations, and charges. At check-out the hotel/motel front desk staff will utilize the PMS system to generate a guest's invoice.

Call Accounting Mate can be configured to post guest telephone charges directly to their corresponding PMS guest folio.

8.1 Software Requirements

The Call Accounting Mate software WinLINK PMS module is designed to integrate with the PMS systems via a text file, ODBC connection or API. The WinLINK PMS application named wpms.exe can be found in the same folder as your CAM software (i.e. c:\bill\wpms.exe).

1. The WinLINK PMS software utilizes ODBC connections to retrieve guest telephone calls from CAM and post them to the PMS system's guest folio. The ODBC connection to the CAM database is created using an ODBC database driver. The required driver is SQLite2 ODBC Driver (version 0.67 or later).

Note: The database driver must be installed on the computer where the CAM software is installed

SQLite ODBC Driver
Call Accounting Mate stores its telephone call records in an SQLite2 database. An SQLite2 ODBC driver is required to connect to the call records table. This driver is available on the internet at the following URL:

<div align="center">

http://www.ch-werner.de/sqliteodbc/

</div>

If you are unable to locate the driver on this URL then please utilize an internet search engine to locate the latest release of this SQLite ODBC driver. The file you download should contain an installation program. Execute the installation program to install the database driver. You are now ready to configure the WinLINK PMS software to retrieve guest calls from CAM and post them to the appropriate PMS system (see Configuring WinLINK PMS).

8.2 Configuring WinLINK PMS

The Call Accounting Mate WinLINK PMS software can post guest telephone call records to your Property Management System (see section Property Management Systems (PMS) Interface for a list of supported PMS systems). Please note the WinLINK PMS software utilizes an ODBC connection to retrieve and post guest telephone calls from the CAM call record table to your PMS system. The required ODBC driver must be installed on the computer where the CAM software is installed (see section Software Requirements).

Use the following steps to configure the WinLINK PMS software to post guest telephone calls to your PMS system.

1. Launch the WinLINK PMS software. Press the Windows **Start** button, next select the **Programs** menu item, then **Call Accounting Mate** and finally **WinLINK PMS**. Alternatively, you can

manually launch the WinLINK PMS software by pressing the Windows Start button, selecting the **Run** command and executing the following bolded text.

c:\bill\wpms.exe

The WinLINK PMS Software should now be visible on your screen.

2. Assign an interface name to the Profile name box. The interface name is used as an identifier only and has no effect on the functionality of the software. For example, use a name that identifies either the Call Accounting Mate site or your PMS system. For this example we will use the interface name "CAM".

3. If you have previously created a DSN ODBC connection to your CAM calls database then skip ahead to step 5 otherwise proceed to step 4.

4. Press the Add or Modify an ODBC Connection button to create a DSN with ODBC connectivity to your CAM calls database. Please note the SQLite or MySQL database driver compatible with your Call Accounting Mate software must be installed on your computer before you can create a DSN. Please see section <u>Software Requirements</u> for instructions on how to install the database driver.
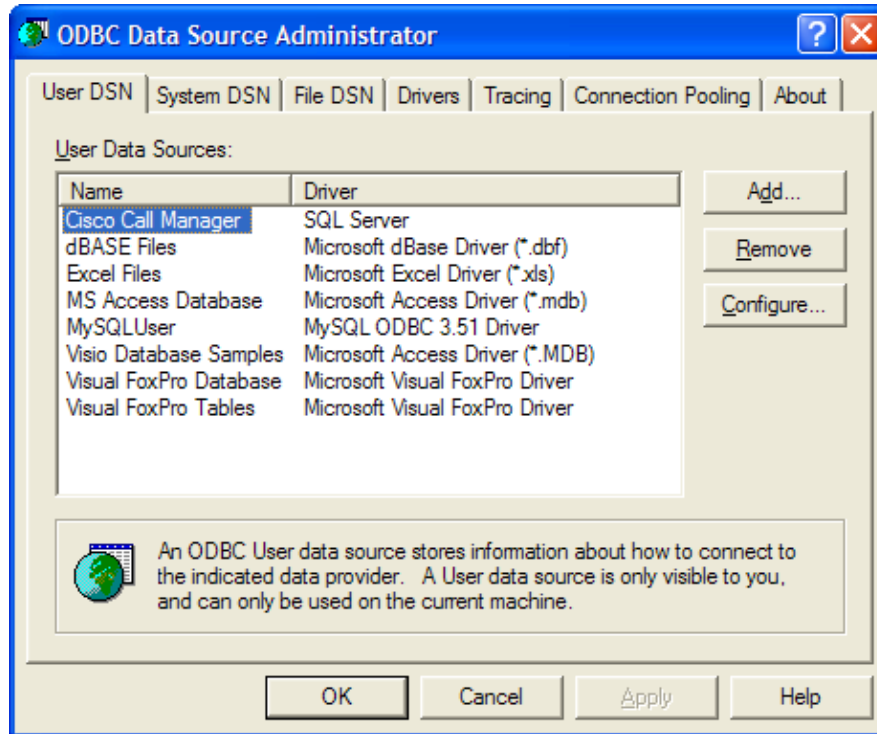
The ODBC Data Source Administrator dialog should now be visible on your screen. If this dialog does not appear then consult your Windows documentation on instructions on how to install its ODBC component.

Use the **User DSN** tab to create an ODBC connection to CAM that is only available to the active user on this workstation. Use the **System DSN** tab to create an ODBC connection to CAM that is available to any user logged into this workstation. We recommend you create a System DSM. Click the **System DSN** tab and then press the **Add** button.
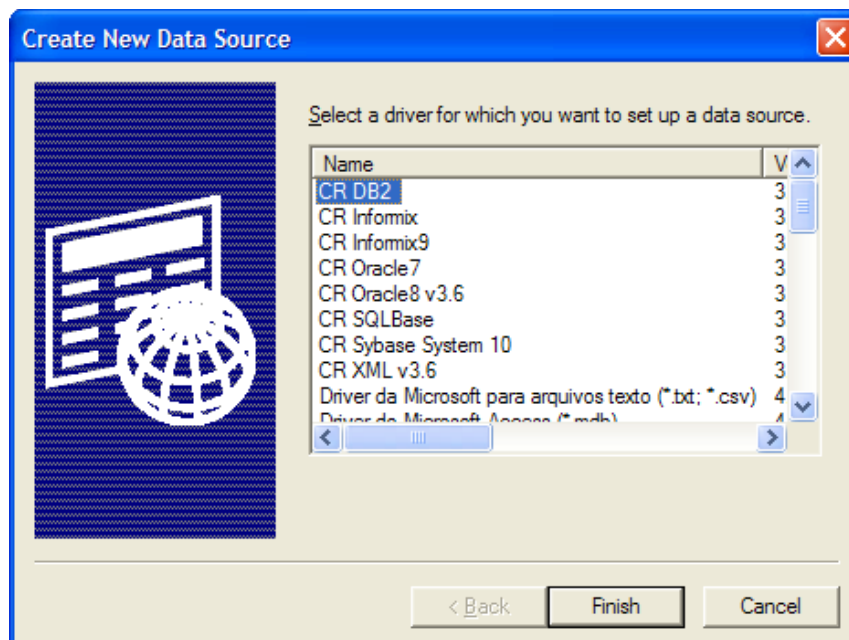
Select the database driver compatible with your CAM software (i.e. SQLLite ODBC Driver).

SQLite ODBC Driver
Select the SQLite ODBC Driver and then press the Finish button. The SQLite ODBC DSN Configuration dialog should now be visible on your screen.
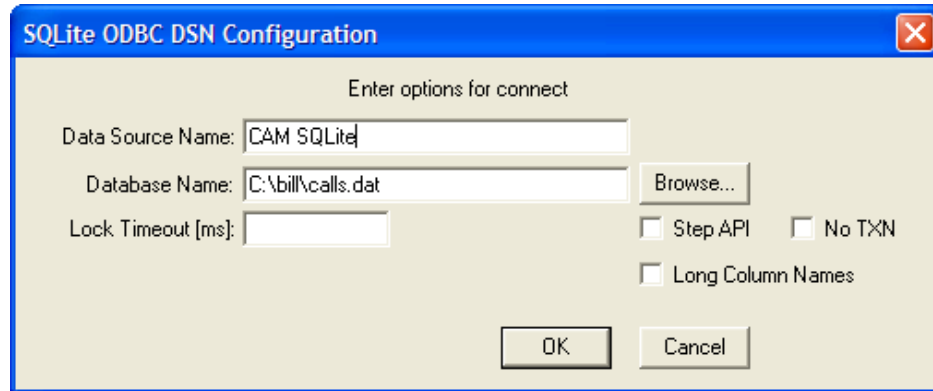
Use the **Data Source Name** box to assign a label (i.e. description) to the DSN you are creating. The name used does not affect the how the DSN operates. Use a name that easily identifies the DSN you have created (i.e. CAM SQLite). Use the **Database Name** box to specify the file name of the CAM database. The database name is "*calls.dat*" and can be found in the c:\bill directory. Use the **Browse** button to locate the database.

The **No TXN**, **Step API** and **Long Column Names** boxes should remain unchecked. Press the **OK** button to save your DSN configuration information.

4. Use the WinLINK PMS Data Source Name (DSN) list box to select the DSN with an ODBC connection to the Call Accounting Mate calls database whose calls are to be posted to the PMS. An example of this screen is pictured below using the SQLite3 connection

5. Next press the Properties button to configure the required ODBC connection to the CAM telephone call table. The following screen should now be visible.
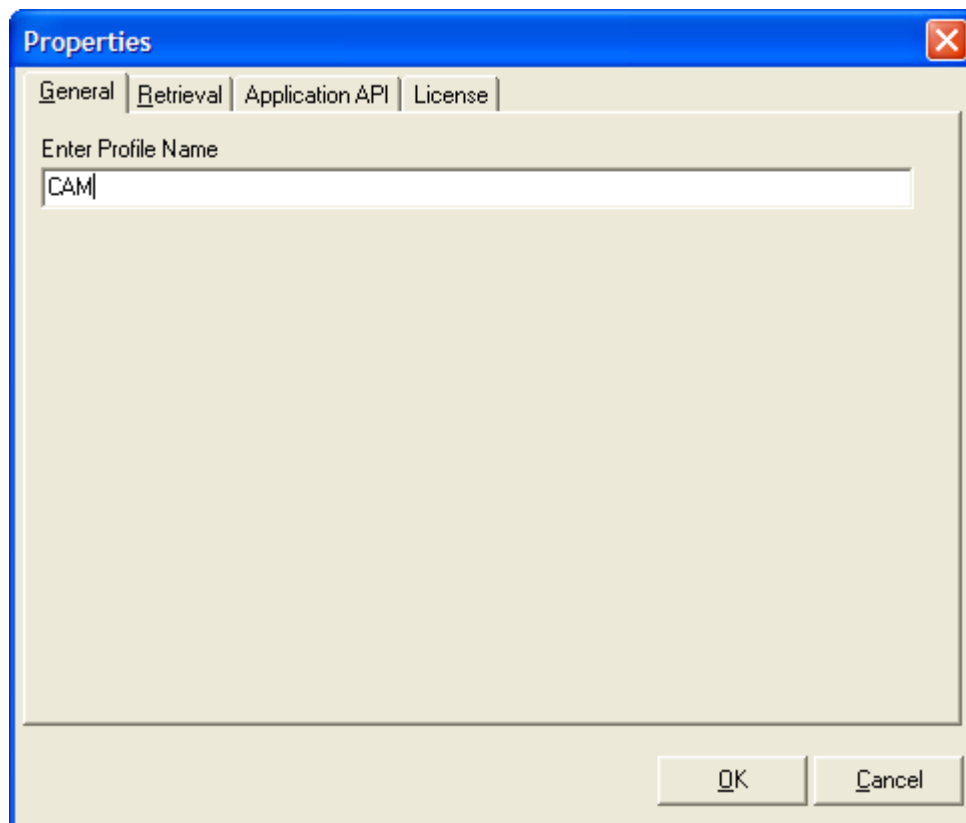
Use the **Enter Profile Name** box to assign a name to your CAM ODBC connection. For this example we will use the name CAM.

6. Next click the **Retrieval** tab to select which call records you wish to post to the PMS system. The Retrieval Tab dialog box should now be visible on your screen.
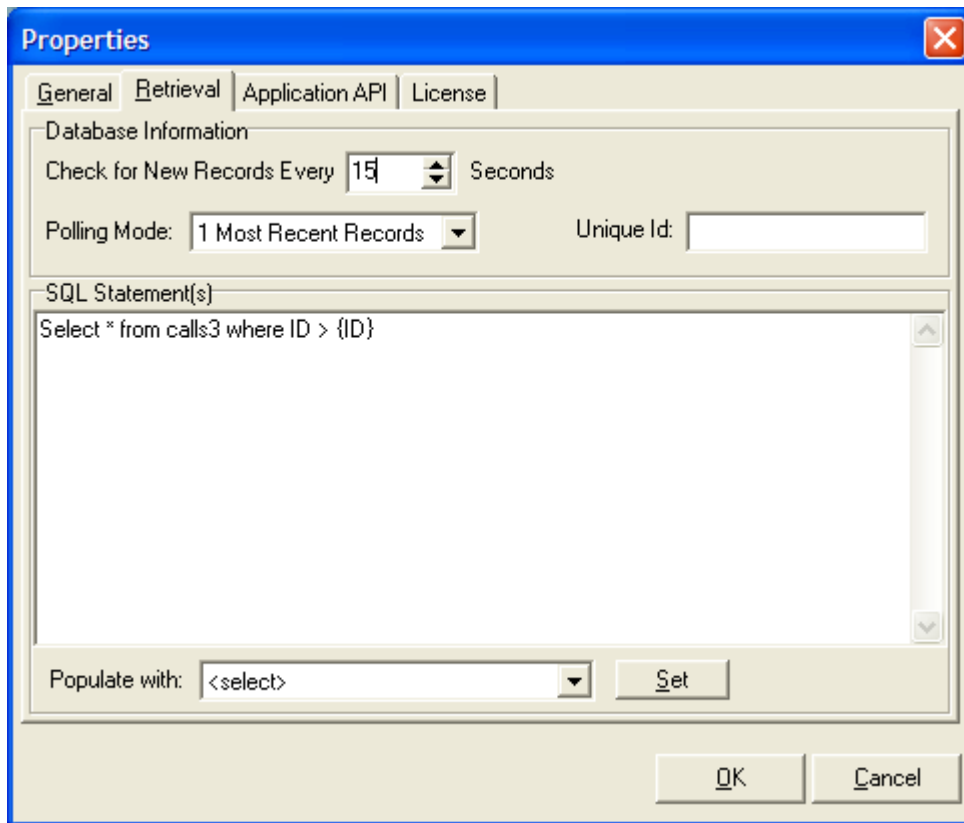
Use the **Check New Records Every xx Seconds** box to specify how frequently WinLINK PMS should check the CAM telephone calls table for new guest calls. This box should be set to a value of 60 seconds or less (15 recommended).

Use the **Polling Mode** box to select which telephone calls are to be retrieved from the CAM telephone calls table and posted to the PMS system. Set this field to **Most Recent Records** to have WinLINK PMS post only new calls to the PMS system. Set this field to **All Records** to have WinLINK PMS post all calls in its database to the PMS system. The recommend setting is Most Recent Records.

The **Unique Id** box identifies the last call record posted to the PMS system. This field will not be visible if the Polling Mode option is set to All Records. The Unique Id value will automatically increment each time a new call is posted to the PMS system. The next time the WinLINK PMS software posts calls it will select the first record after the current record identified by the Unique Id. This prevents duplicate records from being posted to the PMS. The Unique Id value should not be manually modified (unless a CAM support technician instructs you to).

The **SQL Statements** box contains the SQL query used to select which records will be retrieved from the CAM call record table and posted to the PMS. The SQL query contained in this box is automatically populated each time the **Set** button (located to the right of **Populate With** option) is pressed. The Populate With option will determine the SQL Query that is generated. The

following table provides a list of the Populate With values and their corresponding SQL statement when the Polling Mode box is set to "Most Recent Records".

Populate With	Action / SQL Query
<clear sql statement>	Clears the SQL statements box.
Standard Fields	select id, pabx_datetime, user_ext, call_type, co, duration_datetime, number, grand from calls3 where (ID > {id})
Standard Fields (billable calls only)	select id, pabx_datetime, user_ext, call_type, co, duration_datetime, number, grand from calls3 where (ID > {id}) and (grand > 0)
Standard Fields (Last Call)	select id, pabx_datetime, user_ext, call_type, co, duration_datetime, number, grand from calls3 order by id DESC Limit 1
All Fields (Generic)	select * from calls3 where ID > {id}

The following table provides a list of the Populate With values and their corresponding SQL statement when the Polling Mode box is set to "All Records".

Populate With	Action / SQL Query
<clear sql statement>	Clears the SQL statements box.
Standard Fields	select id, pabx_datetime, user_ext, call_type, co, duration_datetime, number, grand from calls3
Standard Fields (billable calls only)	select id, pabx_datetime, user_ext, call_type, co, duration_datetime, number, grand from calls3 where (grand > 0)
Standard Fields (Last Call)	select id, pabx_datetime, user_ext, call_type, co, duration_datetime, number, grand from calls3 order by id DESC Limit 1
All Fields (Generic)	select * from calls3

The recommend setting for the Populate With box is "Standard Fields (billable calls only)".

7. Next, click the Application API tab to identify the desired PMS system and the database containing the guest folio. The Application API dialog box should now be visible on your screen.
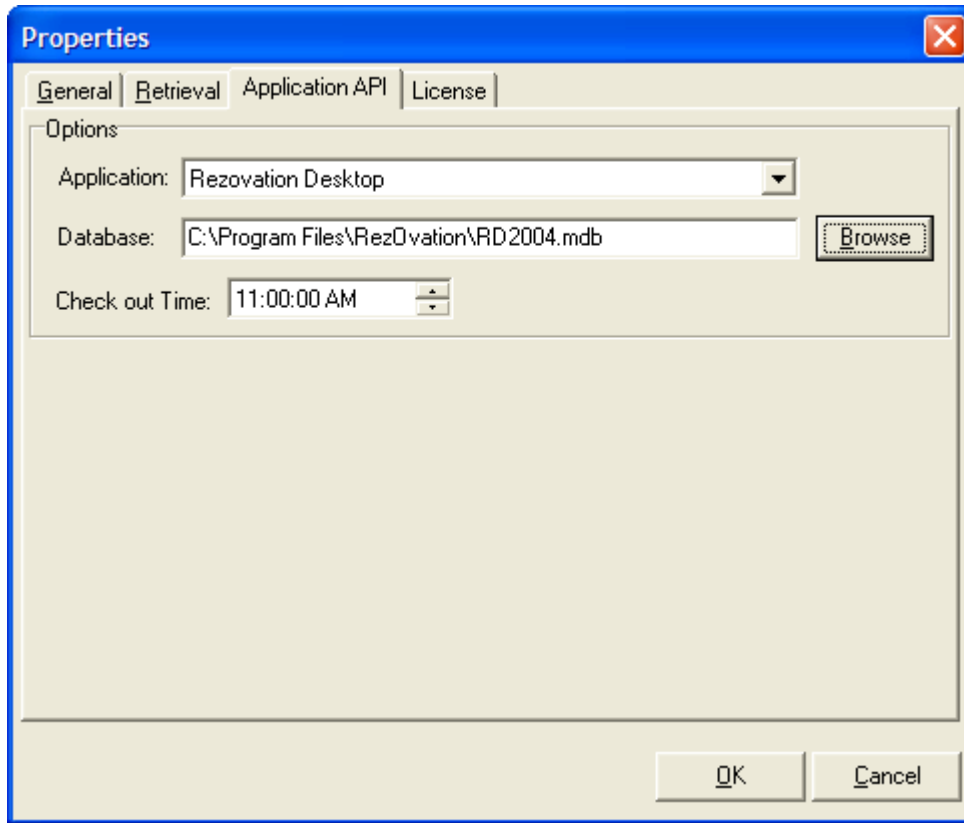
The following table details the settings to be used with each PMS system supported by the WinLINK PMS software.

PMS System	Database	Check Out Time
Rezovation Desktop (RezStream Professional)	2004.mdb	24 Hour format. Set to your properties check-out time. Defaultf value is 11:00 am.
Rezovation Guest Tracker	Tracker.mdb	24 Hour format. Set to your properties check-out time. Defaultf value is 11:00 am.
TCS Systems (Guest Tracker)		24 Hour format. Set to your properties check-out time. Defaultf value is 11:00 am.
GraceSoft (Easy InnKeeping)	Calls.txt	24 Hour format. Set to your properties check-out time. Defaultf value is 11:00 am.
Text File	Calls.txt	24 Hour format. Set to your properties check-out time. Defaultf value is 11:00 am.

Note: the Text file option is typically used for testing only. Call records retrieved from CAM are stored in the specified text file.

8. Press the OK button to save your settings. The WinLINK PMS Interface main dialog should now be displayed on your screen.
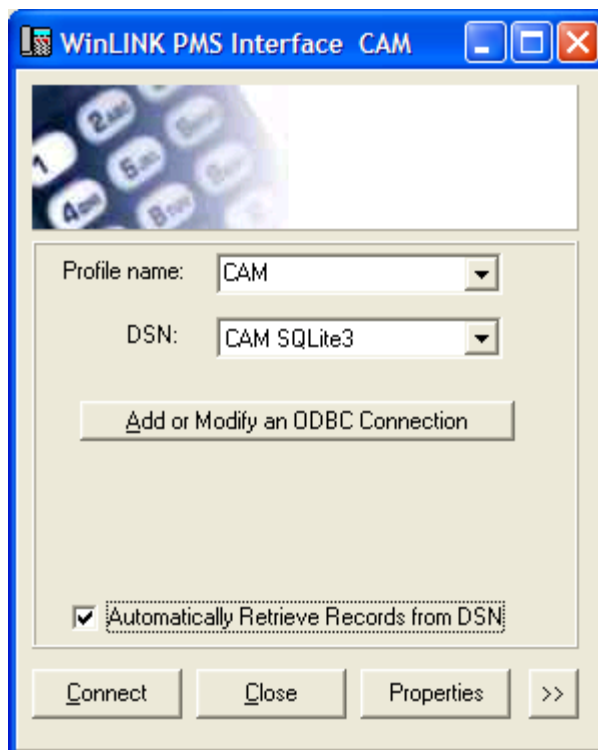
Check the **Automatically Retrieve Records** from DSN option to instruct the software check for and post any new records at the frequency you specified in your configuration (see step 6).

9. The WinLINK PMS software is now configured to automatically post guest telephone charges to the PMS system.

The WInLINK PMS Interface program will only post guest charges to the PMS system when it is running. As such this program should never be closed. Instead click the minimize button on the top right hand corner of this dialog box to hide this program on the system tray. We also strongly recommend you add a shortcut to this application in the Windows startup group. This will ensure the application is automatically restarted each time the computer is started and the user logs in.

9.0 Registering your Software

Unless your CAM software is registered it will operate on your computer for only 14 days. You can register your software at any time by clicking the Register option located in the Main menu. You do not need to register the software to complete your installation. In fact you can continue to use your software for up to **14 days** after it has been installed without registering it.

To unlock and register your software, simply log into Call Accounting Mate using the following default information.

User Name: Administrator
Password: null

1. From the **Web** menu, Select **Register** (or **Update License** if you are purchasing an upgrade to a larger system). The Call Accounting Register window should now be visible.

2. Fill out the Registration form.

    a) Enter your full **Company Name**.

    b) Enter the **Number of users** you purchased (i.e. 25, 50,100,250).

        If you purchased the unlimited version please enter 10000 users. Please select the correct size. It must match the size we have on file or the License Key will fail.

    c) Click the "*Generate*" button.

        A unique **Private Key** will be generated. Please cut and paste the **Private Key** (or manually type the key) into an email to our support team at:

        Product Activation and Registration: support@callaccounting.ws

        In order to facilitate a rapid activation process, be sure to include your proof of purchase (transaction record email from WorldPay or PayPal), your name, contact information, company name, product size and the Private Key.

3. Our technical support team will generate a unique **License Key** for you to enter into the License Key field. We will email you the key. Copy this information into the **License Key** field and click *OK*.

4. You are done.

Additional registration information may be found on our website:
http://www.callaccounting.ws/call_accounting_registration.htm

NOTE: Please do not attempt to register the same product for multiple systems. Select the system that will be running the software and register the product.   If you wish to move your software to another system, you may be subject to an additional charge.

10.0 How To

10.1 Recover CAM data from a hardware or OS crash

Call Accounting Mate stores all of the call accounting data in the file calls.dat and all configuration in the file bill.ini. In an event of a hardware failure or OS crash, you need to recover these 2 files from the old system. CAM can then be installed on a new system and these 2 files copied to the directory of the new PC where CAM is installed.

In the case of calls.dat file being damaged, we have developed a recovery utility. It tries to recover data from a damaged calls.dat file automatically and/or send user data and log files to developers for further analysis and recovery procedures.

The utility is available for download from:
http://www.callaccounting.ws/release/setupcamrec.exe

10.2 Update or retrieve a new PBX driver from our website

Telephone system manufacturers often upgrade their systems and update or change the CDR (Call Detail Records). We develop new drivers frequently. We keep a library of these drivers available to you at all times on our website. You can download the latest driver for your telephone system by following the procedures outlined here:

http://www.callaccounting.ws/howto/How To Install A New Driver From Support Web Site.mht

10.3 Import a tariff plan for your location

Call Accounting Mate can be directed to calculate cost and find location information for virtually any region around the world. You can load the default table for your country as follows:
http://www.callaccounting.ws/howto/How To Load Default Tariff Plan For My Country.mht

A detailed example is available here:
http://www.callaccounting.ws/howto/How To Import Tariff Plan.mht

10.4 Create custom reports from Call Accounting Mate

Call Accounting Mate is equipped with a set of built-in reports that can be processed by clicking a few buttons. The reports have a static style and look to them. Custom reports can be designed that allow the user to select sort order, filter and columns.

A detailed example follows:
http://www.callaccounting.ws/howto/How To Use Custom Report.mht

10.5 Create custom online views

Call Accounting Mate allows you to view your data in various pre-defined and flexible formats. You can create your own custom views in order to more readily access your information. The more information you provide to the software, the more descriptive the views will be depicted.

A detailed example showing how to enter department/user information and creating custom templates is available here:
http://www.callaccounting.ws/howto/How To Use Online Views.mht

10.6 Schedule Automated Tasks

Automated tasks can be created for specific events or recurring reports. You may want to set specific criteria for a special report to alert you of misuse/abuse or 911 calls. You may also want certain reports to be run daily, weekly or monthly. Call Accounting Mate allows you configure these options for email reporting (see Scheduling Report Generation).

A detailed example follows:
http://www.callaccounting.ws/howto/How To Use Task Scheduler.mht

11.0 Other references

Call Accounting Mate is the world's most popular try and buy shareware call accounting software. It is available online at various major download sites. Call Accounting Mate is the winner of many international awards for its simplicity, cost and functionality.

References:

Sales & Support:
http://www.callaccounting.ws/call_accounting_contactus.htm

General Sales
sales@callaccounting.ws

General Support
support@callaccounting.ws

Brochure:
http://www.callaccounting.ws/release/cam_brochure.pdf

Support Forum
www.callaccounting.ws/forum

Asterisk Forum:
http://www.callaccounting.ws/forum/index.php?board=5.0

Download a Free Trial:
http://www.callaccounting.ws/call_accounting_download.htm

Ordering:
http://www.callaccounting.ws/call_accounting_ordernow.htm
(we accept most major credit cards through our payment gateways – PayPal and WorldPay)

Registering Your Software:
http://www.callaccounting.ws/call_accounting_registration.htm