Call Master End User Manual
Version 6.5

Index of Content

Chapter 1

Introduction – What is CallMaster?

CallMaster software is a computerized call billing system. With CallMaster, all calls to and from your PABX are automatically recorded in a customized database. CallMaster can provide you with the up-to-the-minute reports on your organization's telephone use. It allows you to pinpoint and eliminate problem areas that may be needlessly costing you money.

CallMaster can be connected to any key system or digital exchange with SMDR output through and RS232 serial communication port. There is no need to buy any special equipment. CallMaster works in the background of your IBM PC or compatible computer. While CallMaster is in operation, you can continue to use your PC for word processing, accounting or any other applications.

Pre-Installation for your CallMaster

System Requirements:

Before installing the software onto the host computer, you should verify the following minimum requirements:

Hardware
- IBM compatible personal computer with Pentium Celeron 166MHz or higher

- SVGA monitor or other compatible monitors

- At least 64MB RAM

- Hard disk with at least 4.3GB capacity

- 2 serial ports (mouse & SMDR serial cable)

- One 3 ½" diskette drive

- Microsoft mouse or other compatible pointing device

Software

Windows 95, 98, NT, 2000, XP

Chapter 2

QuickStart: What to do before you use CallMaster

There is a major step to go through before you are able to use the CallMaster to generate reports.

A) Classify the Extensions according to organization chart
1. Set-up the Company name and ID as per Figure 4
2. Set-up the Division Name and ID as per Figure 5
3. Set-up the Department name and ID as per Figure 6
4. Set-up the Extension Number, Name, Title, Company, Division, Department, Authorization Code as per Figure 7

Note: To determine which extensions have not been classified, click on the Unclassified button on the Display Extensions (refer to Figure). All the extensions shown under this option need to be classified in order to generate more meaningful reports.

To re-classify the extensions (for Unclassified or Classified Extensions)
1. Enter the extension in the Search extension box and click the "Search extension" button
2. All the fields will be populated with current data
3. Change the required fields and click the Change button. This will update the database with the latest configuration.

Note: If you need to refresh and update the Old data (saved in cas4.mdb), then click the Update Processed Table button. This will update the processed old data with the latest configuration QuickStart on How to use CallMaster

Chapter 3

Software Overview and Description

Getting Started
- To begin using your CallMaster software, go to Start button, click on Programs and CallMaster.

Figure 1: Overview of the CallMaster Main Window
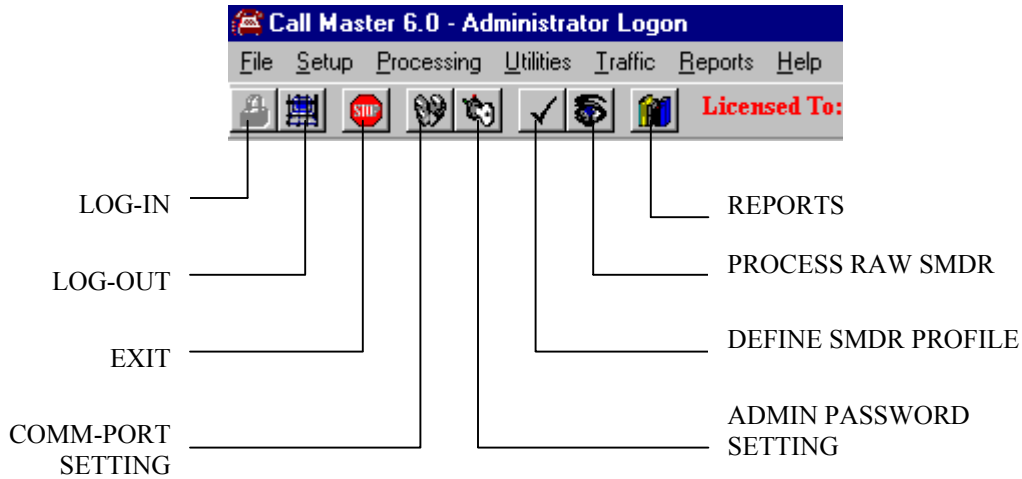
Toolbar Buttons Descriptions

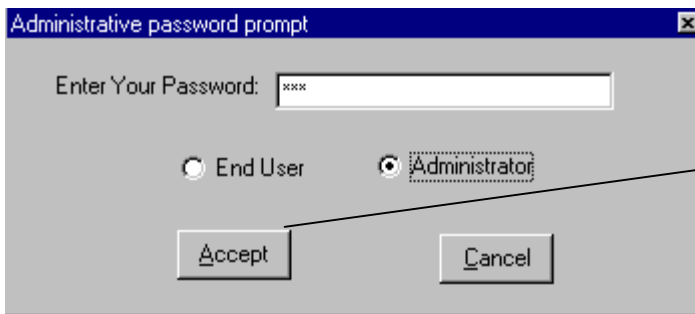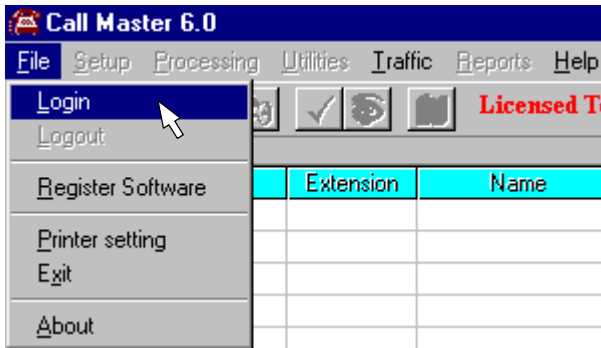Figure 2: Overview of CallMaster Toolbar Menu

Pull-Down Menu Descriptions

The Following Options are available under the **PULL-DOWN MENU**

FILE   - Login, Logout, Register Software, Printer Setting, Exit, About

SETUP   - PABX Type, CommPort Setting, Company Structure Setup, Rates Table Setting, Change Password, Software Setting

PROCESSING - Define SMDR Record, Set Record Profile Name, Process Raw SMDR Now, Schedule SMDR Processing, Save Raw Data

UTILITIES   - Backup Data, Restore Data, Purge Data, Repair Database

TRAFFIC   - View

REPORTS   - View Reports from Current Database, View Reports from Backup Database

HELP   - Help Files

Log-in to your CallMaster

Login to your Call Master Program

- From the Pull Down Menu, click on **File** and select **Login (Default Password: 888),** point to Administrator and click **Accept** button.

Select Administrator, key in the password and click on Accept

Figure 3: Log-in Screen

Company Structure Set-up

Company Setting

Company Setting (Company Structure Set-up)

This option allows and enables you to generate reports based on the grouping you have defined. Each extension must be grouped or classified according to Company, Division and Department. Each extension can only be grouped or classified into one Company, one Division and one Department.

To group the extension, you must first define the Company, Division and Departments *(in the mentioned order)*.

Note: If the extensions were not grouped or classified according to Company, Division and Department, these extensions will be processed and grouped under 'Unclassified' Company, Division and Department
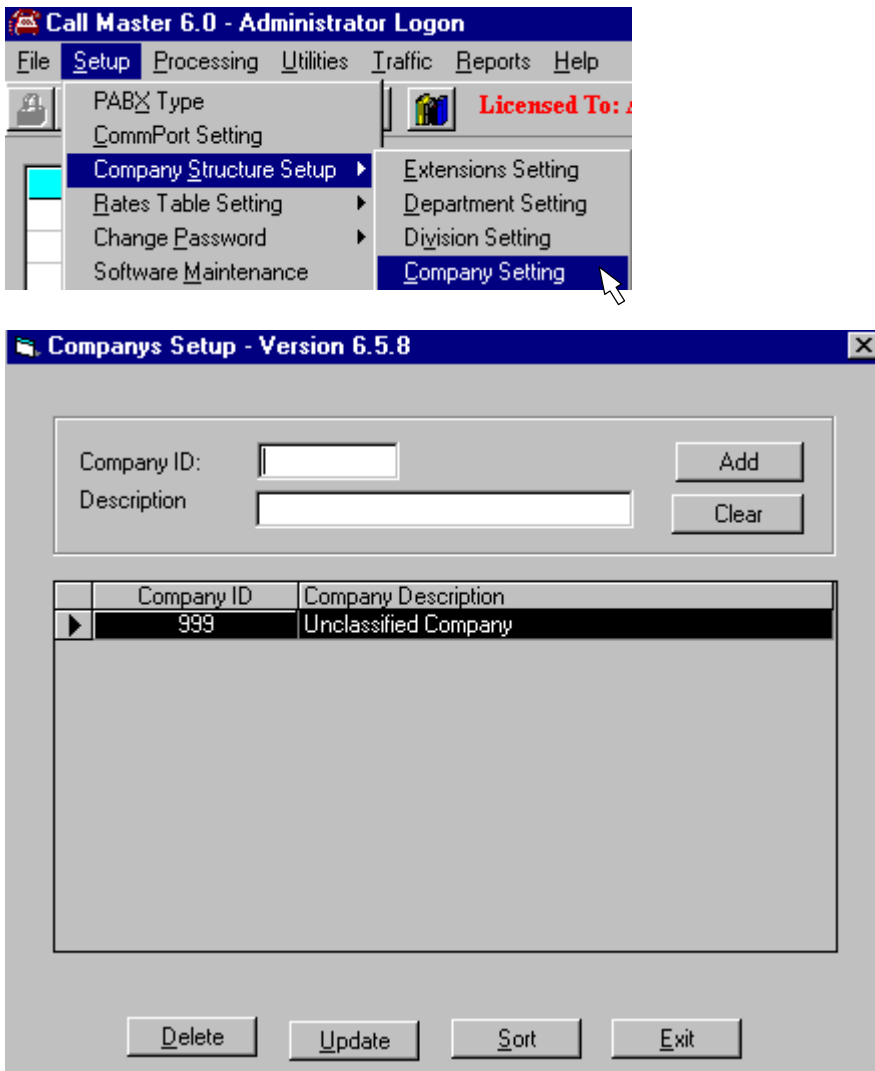

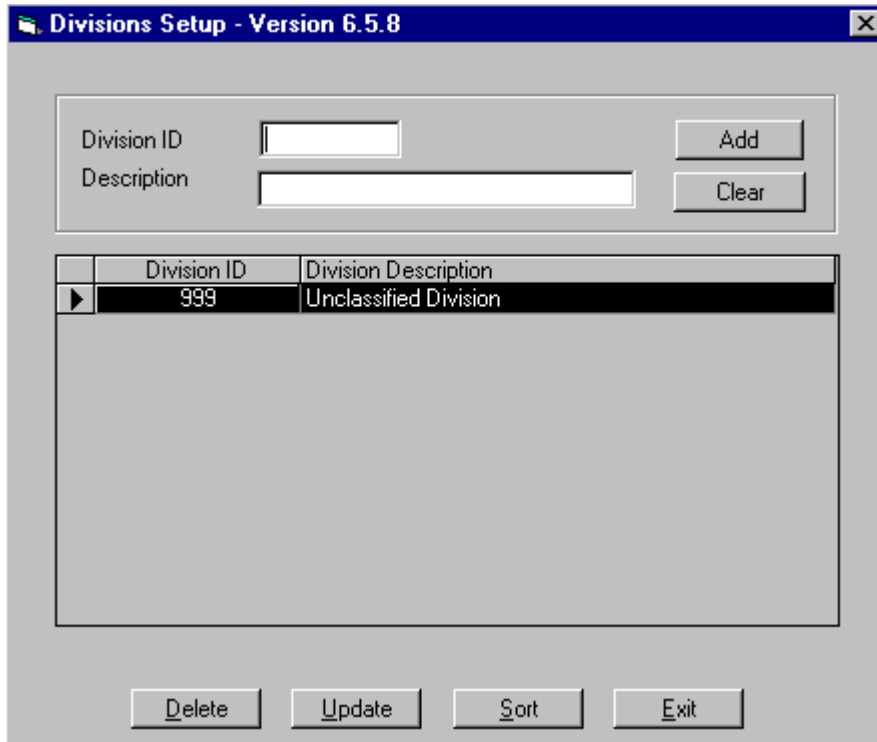Figure 4: Company Setting (Company Structure Set-up)
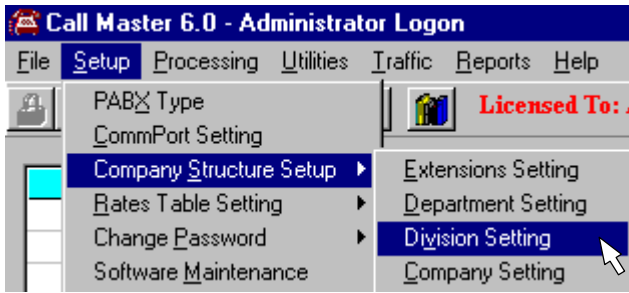
Division Setting

Figure 5: Division Setting (Company Structure Set-up)
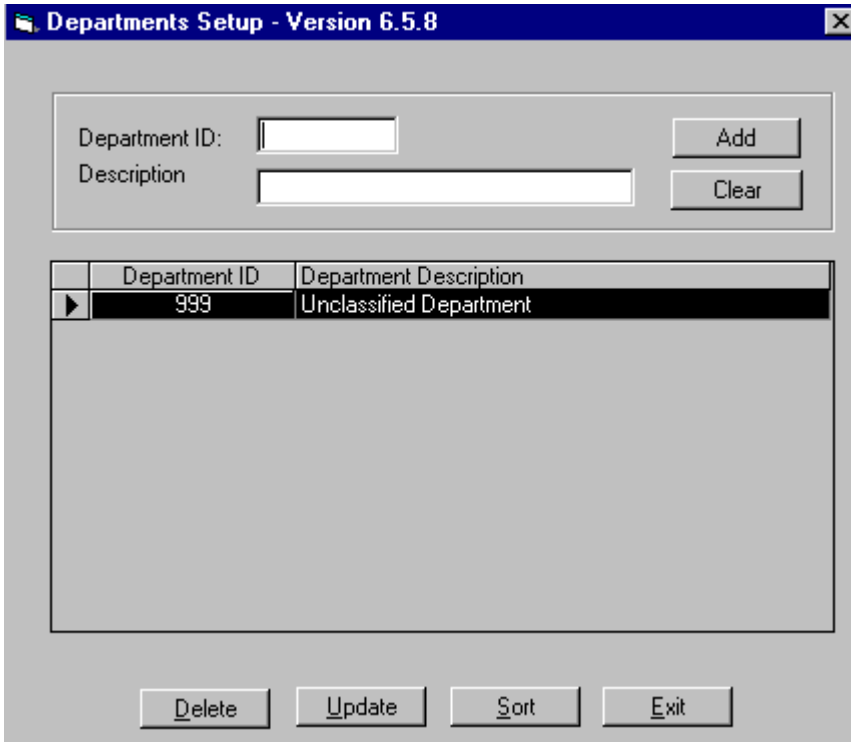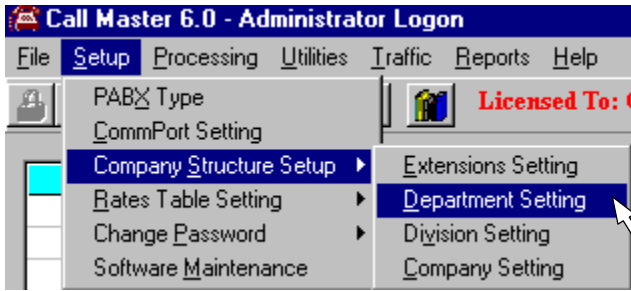
Department Setting

Figure 6: Department Setting (Company Structure Set-up)

Extension Setting

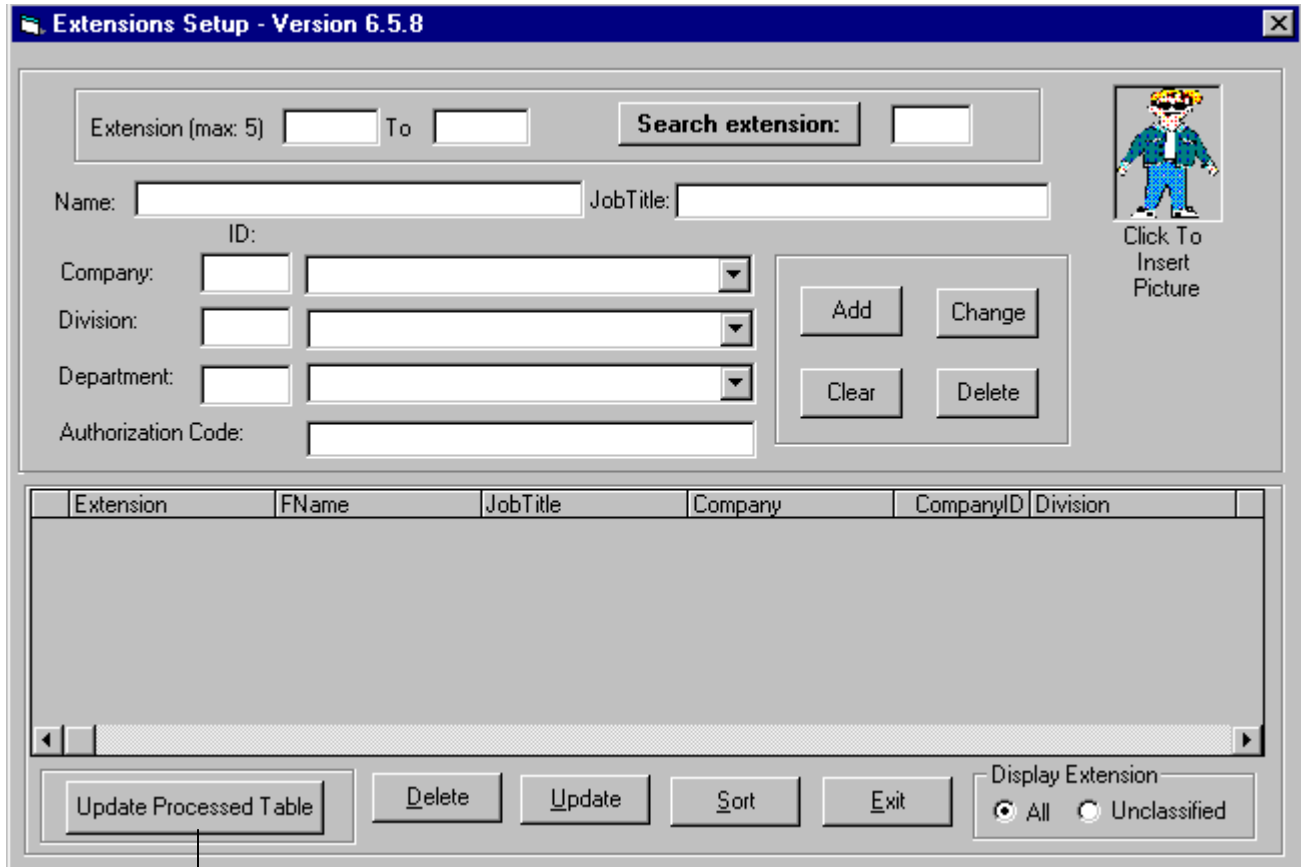Figure 7: Extension Setting (Company Structure Set-up)

Used to refresh and update the processed data with the latest configuration. For example, extension 123 has been wrongly configured for Department A. A correction was then made to reconfigure the mentioned extension to Department B. Click on this button to reflect the changes made to the old data, otherwise extension 123 will appear in two departments.

Generating Reports

Generating Reports

To generate reports for current month, click the 'View reports from Current database'. It depends on the parameter set in the 'Auto Database Backup' option under the Software Maintenance. If it was set at 'None', then the database contains all data from the date of installation if data has not been purge from the database. If it was set at Monthly, then the current database contains data for the current month only. If it was set for 'Every 2 Months', then the database contains last month and current month data. And so forth.

To generate reports based on backup database, click the 'View report from Backup database'. A new window pop up and prompt you to select the database name. The selected database will be used as default database for reporting.

Report Templates

This option enables you to generate various types of reports based on the selected templates. You can either select the current database (current month) or the backup database for reporting Select this option if you think the database is corrupted due to improper shut down of program. Repair database restores the integrity of the database structure
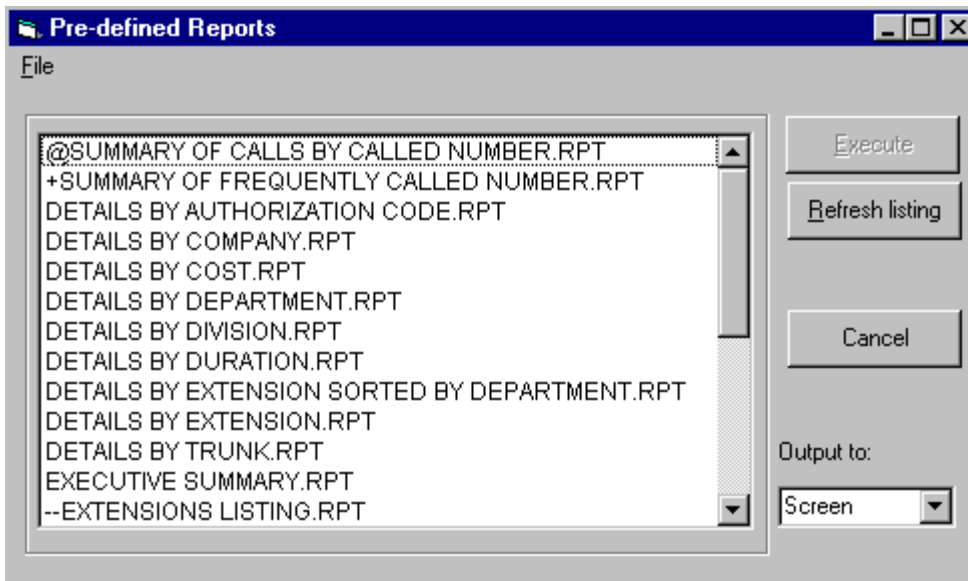

Figure 9: Report Templates Screen

Query Dialog Box

Query Dialog Box

Once you have selected a report template, a 'Query Dialog Box' appears. This window allows you to generate specific reports based on the chosen parameters. Parameters such as Date, Extension, Department ID, Division ID, Company ID, Cost, Time, Duration and Trunk are available for selection. Often, different combination of these parameters will generate different type of reports. By default, all parameters are blank, which means report will be generated without filtering

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Figure 10: Query Dialog Box Screen

CallMaster Sample Report Templates:

- Summary of Calls by Called Numbers
- Summary of Frequently Called Number
- Details by Authorization Code
- Details by Authorization Code (Hide)
- Details by Company Sorted by Date Time
- Details by Company Sorted by Extension
- Details by Costs Sorted by Date
- Details by Costs
- Details by Departments Sorted by Date Time
- Details by Divisions
- Details by Duration
- Details by Extensions Sorted by Company
- Details by Extensions Sorted by Date Time
- Details by Extensions Sorted by Department
- Details by Extensions Sorted by Extension
- Details by Trunks
- Executive Summary
- Summary by Authorization Codes
- Summary by Company
- Summary by Departments Sorted by Call Type
- Summary by Departments
- Summary by Divisions
- Summary by Extensions Sorted by Company
- Summary by Extensions Sorted by Departments
- Summary by Extensions Sorted by Division
- Summary by Extensions Sorted by Extension
- Summary by Extensions Sorted by Calls
- Summary by Extensions Sorted by Costs
- Summary by Trunks
- Summary of Daily Traffic
- Top 25 Extensions by Cost
- Top 25 Extensions by Duration
- Top 40 Extensions by Cost
- Top 40 Extension by Duration

You can further customize your reports based on:

- Incoming only
- Outgoing only
- Incoming and Outgoing only
- Outgoing Type : Hand Phone,Outstation, International, Local, All
- Extension (by range or by choice)
- Department (by range or by choice)
- Division
- Company
- Duration
- Time
- Cost
- Trunk Line

Case Examples for Generating Reports

I)   Generate a report of calls which are more than a specific sum

Select "Details by Cost", and click on Execute

Click Go to execute the report

Key in the relevant cost

Denotes the report currently being executed

Figure 11: Query Dialog Box Screen

DETAILS BY COST.RPT

Report Period: 07/08/2001 **To:** 07/08/2001   **Print Date** 08/10/2001

Report Selection Criterion

Extension :	103	to	207	Cost:	0.20 to	Maximum
Department :	1 to		999	Time:	00:0 to	23:59
Division :	1	to	999	Duration:	00:00:01 to	Maximum
Company :	1 to		999	Trunk:	01 to	05

Outgoing Calls Only (ALL)

Call Cost	Date	Time	CallLen	Trk	Name	Ext	Number Called	Called Location
RM12.87	07/08/2001	13:01:00	00:06:36	01	Melanie	207	087339822	Sabah
RM0.65	07/08/2001	13:04:00	00:00:35	03	Jaclyn	103	097127888	N Puri - East Coast
RM0.26	07/08/2001	11:57:00	00:01:16	01	Libby	205	33414173	Klang
RM0.20	07/08/2001	13:03:00	00:00:25	03	Melanie	207	0133272711	TM Touch Central

Figure 12: Details by Cost Report

II)   Generate a report of the telephone usage for a department

Select "Details by Department", and click on Execute

Click Go to execute the report

Key in the relevant department

Denotes the report currently being executed

Figure 13: Query Dialog Box Screen

DETAILS BY DEPARTMENT.RPT

Print period: 07/08/2001 **to:** 07/08/2001 **Printing date:** 08/10/2001

Report Selection Criterion

Extension:	103	To	207		Cost:	0.00	To	Maximum
Department:	1	To	1		Time:	00:01	To	23:59
Division:	1	To	999		Duration:	00:00:01	To	Maximum
Company:	1	To	999		Trunk:	01	To	05

Outgoing Calls Only (ALL)

Date	Time	Duration	Cost	Trunk	Ext	Dialed Number	Location
Dept: Sales & Marketing							
07/08/2001	13:03:00	00:00:01	RM0.09	01	203	1051	Time announcement
07/08/2001	13:04:00	00:00:47	RM0.09	05	106	62589673	KL
07/08/2001	13:04:00	00:00:35	RM0.65	03	103	097127888	N Puri - East Coast
		SubTotal:	$0.83				

Figure 14: Query Dialog Box Screen

III)   Generate a report of numbers called by a caller

Select "Details by Extension", and click on Execute

Click Go to execute the report

Key in the relevant extension

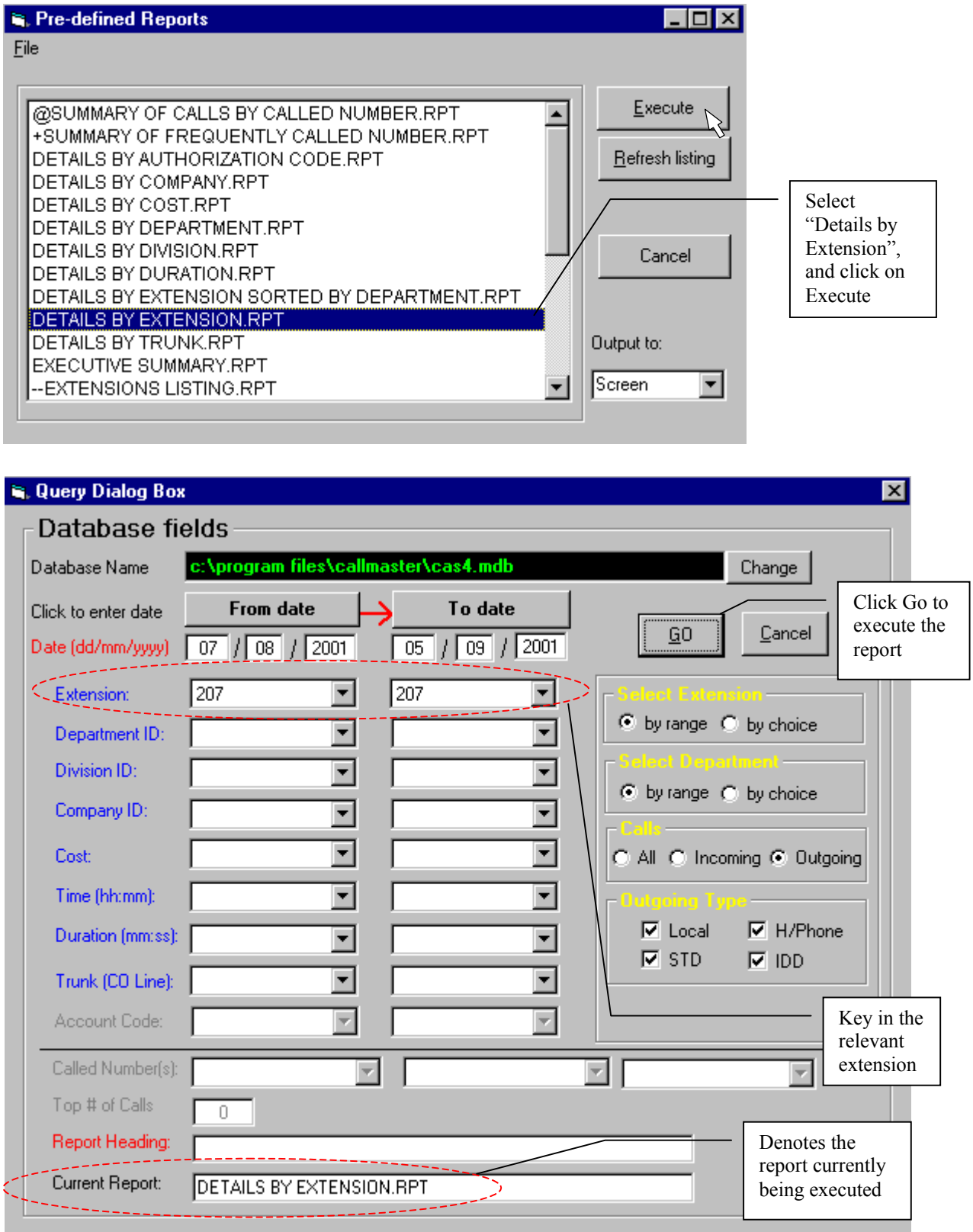Denotes the report currently being executed

Figure 15: Query Dialog Box Screen

DETAILS BY EXTENSION.RPT

Print period:　　　　07/08/2001　　**to:**　　05/09/2001　　　　　　　　　**Printing date:**　　　08/10/2001

Report Selection Criterion

Extension:	207	To	207	**Cost:**	0.00	To	Maximum
Department:	1	To	999	**Time:**	00:01	To	23:59
Division:	1	To	999	**Duration:**	00:00:01	To	Maximum
Company:	1	To	999	**Trunk:**	01	To	606

Outgoing Calls Only (ALL)

Date	Time	Duration	Cost	COLine	Dialed Number	Location
Extension:	207			**Department:**	Sales & Marketing	
Name:	Melanie					
07/08/2001	13:01:00	00:06:36	RM12.87	01	087339822	Sabah
07/08/2001	13:03:00	00:00:25	RM0.20	03	0133272711	TM Touch Central

Summary Calls Usage

Number of Calls:	2	**Average Per Call**
Total Minutes	7.02	3.51
Total Cost	RM13.07	RM6.54

Figure 16: Query Dialog Box Screen
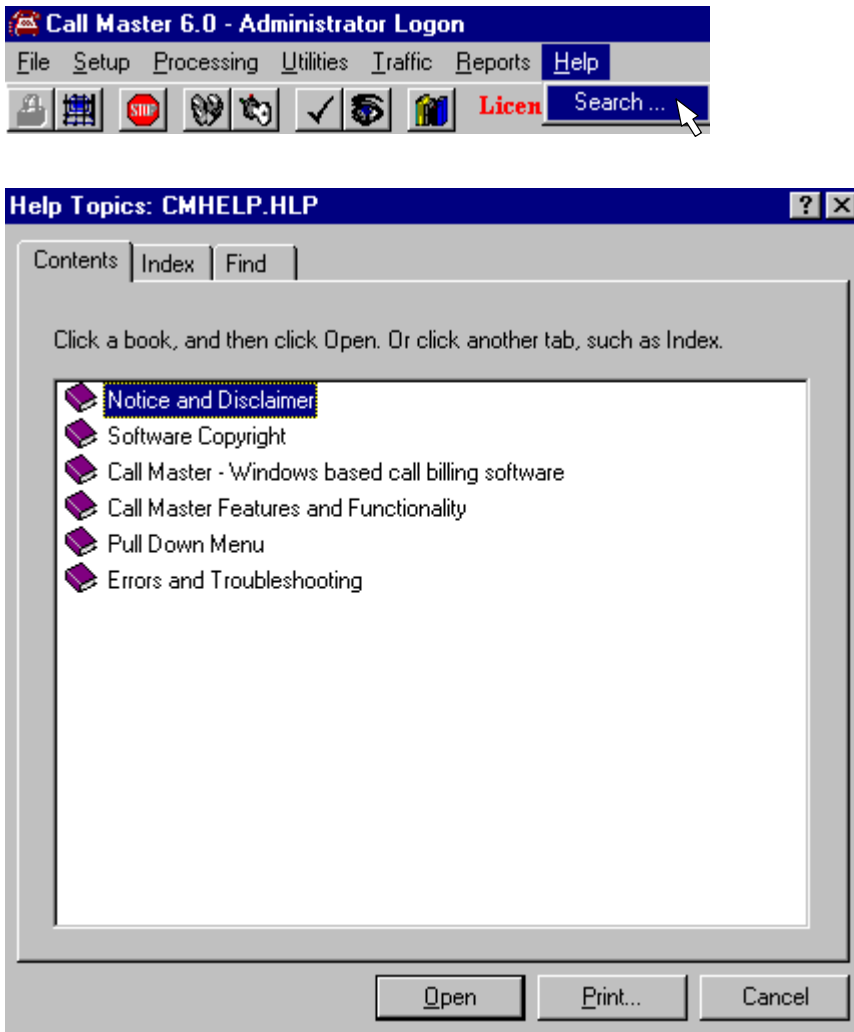
Getting Help

Figure 17: Getting Help Screen

Chapter 4

Errors and Troubleshooting

1. No Data Shown on Online Display Screen

Possible Problem	Possible Solution
No Phone calls were made	Verify that calls were made
There is a communication problem	Verify there is no communication problem by checking whether raw data was captured or not. From the Setup full down menu, click the CommPort Setting. A new pop up windows appears with raw data shown on the lower half of the pop up windows. If no raw data was captured, there are few possibilities: • PABX interface card faulty or not configured properly • PC Communication port faulty or not configured properly (baud rate, stop bit etc) • RS232 cables not plug in properly • Incorrect type of RS232 cables
There is a processing problem – PABX driver or PABX type not set properly	If raw data was confirmed captured (as verified from steps above), then the PABX driver was not configured correctly. Verify the PABX driver against the captured raw data. Also, make sure you have selected the correct PABX type from the 'PABX Type' option under 'Setup' pull down menu.
Data Capture engine not running or loaded	Verify the Data Capture engine is loaded and running. To make sure the engine is running, simultaneously, press Ctr-Alt-Del keys, click on Task Manager. Go to Application Tab. You should see the status for 'Call Master – SMDR Raw Data Terminal' (under the Task Column) indicates running. If you don't see this status or task, exit and rerun Call Master

2. Cannot Run Report

Possible Problem	Possible Solution
No printer driver defined	Defined a default printer driver, even you do not have a printer attached. See Windows or printer manual for details setup.
Database corrupted	Use the Repair option under the Utilities full down menu. Then re-run the report. If this is still not successful, contact your supplier with details information such as Report Template name, PABX type, Driver used.

Errors and Troubleshooting (continued)

3. When I Run the Report, the Report is Blank

Possible Problem	Possible Solution
No processed data in the default database	Make a few phone calls and make sure the data is shown on the Online Display Screen. Then re-run the reports. If this is still not successful, contact your supplier with details information such as Report Template name, PABX type, Driver used.
Date entered was out of range	Verify the date entered. Format is dd-mm-yyyy where dd=day, mm=month, yyyy=year
Parameters (Department ID, Extension, Duration, Cost and etc) selected did not produce a match result	Uncheck all the parameters and re-run the reports