

# INTRODUCTION

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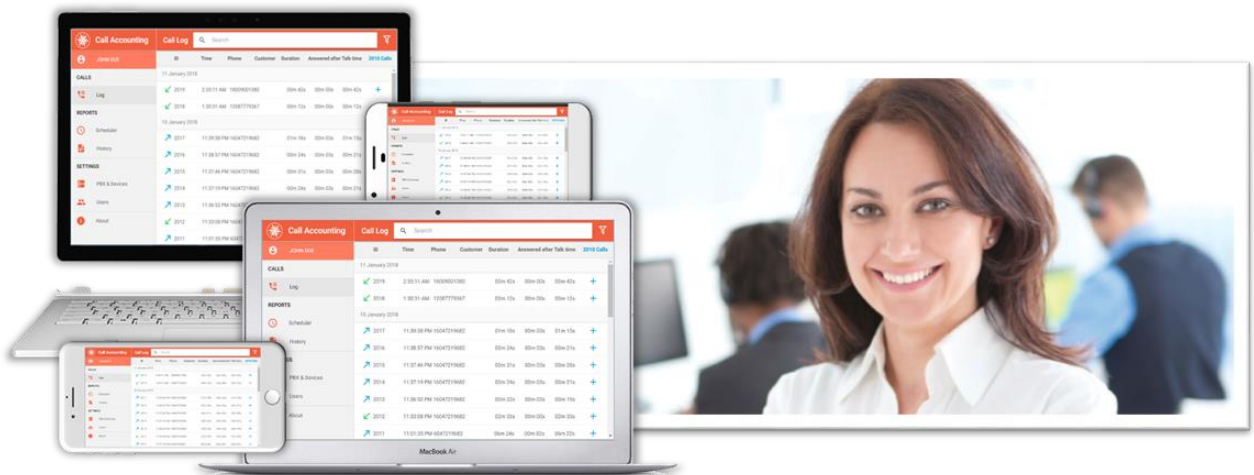
The new Poltys **CCAccounting Pro** is the perfect solution that allows you to track the Panasonic telephony system usage, helping you to make correct business decisions.

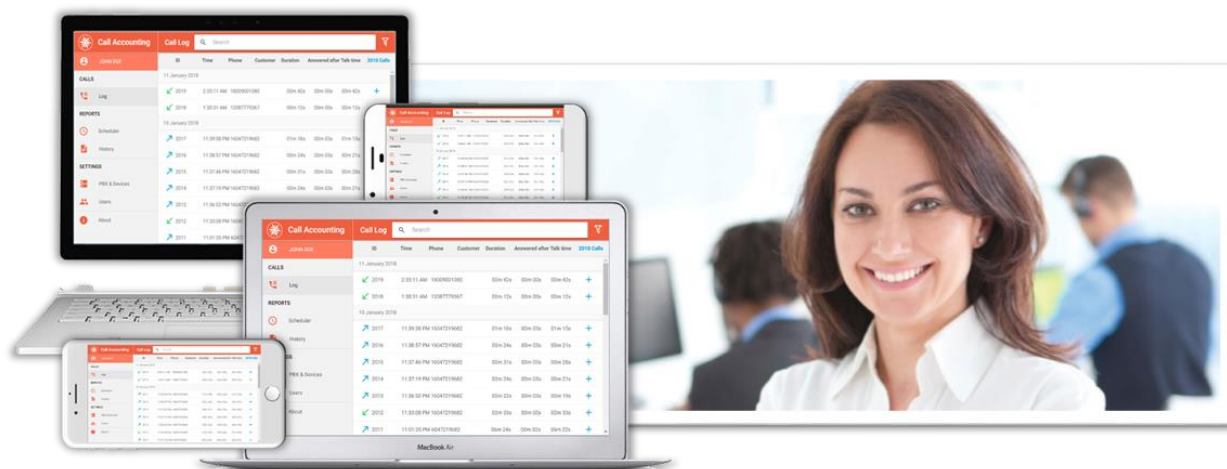
Providing web user interface, no application needs to be installed on the user's PC.

**Call Logging** provides all the data regarding inbound and outbound calls with advanced searching and filtering capabilities.

**Call Reporting** provides call historical data organized to get the best overall view over the call statistics.

**Call Recording** add-on to Call Accounting, that taps the call conversations that take place on different trunks either Analog, E1/T1 ISDN, or SIP, brings more peace of mind and increased productivity to your organization.





## Key Features

- **Cloud-hosted** or **on-premises** solution
- Compatible with Panasonic **KX-NSX/ NS/ TDE/ NCP/ TDA** PBX series
- Connect to and monitor **multiple Panasonic IP-PBXs** simultaneously
- **Web-based** user interface
- Full PBX **call logging**, pinpointing all devices a call went thru until it left the PBX
- Multiple predefined **Excel report templates** with graphic summaries and in-depth details
- Increased functionality by **Trunk Call Recording add-on**
- Play the **call conversation of each call segment** by time offsets

## Enhanced Call Logging

The new solution provides all the data regarding inbound and outbound calls with advanced searching and filtering capabilities.

The new solution presents all referred devices during the call with their associated call segments with complete statistics. The quick search by strings feature with instant results accelerates retrieving information and business decisions making processes within your organization.

## Powerful Call Reporting

The powerful set of 25 Microsoft Excel templates with graphic summaries and details plus ability to design new custom reports help you to always get the exact data you need, when you need it.

Template Name	Category	Can be customized
<b>Billing by Agent</b>	Call Log	Yes
<b>Basic Call Log General</b>	Call Log	
<b>Call Log General</b>	Call Log	
<b>Un-returned Lost Calls</b>	Call Log	
<b>Calls by Talking Time</b>	Call Summary	Yes
<b>Calls by Talking Time by Day</b>	Call Summary	Yes
<b>Calls by Talking Time by Hour</b>	Call Summary	Yes
<b>Calls by Waiting Time</b>	Call Summary	Yes
<b>Calls by Waiting Time by Day</b>	Call Summary	Yes
<b>Calls by Waiting Time by Hour</b>	Call Summary	Yes
<b>Calls by Agent</b>	Call Summary	
<b>Calls by Days</b>	Call Summary	
<b>Calls by DID</b>	Call Summary	
<b>Calls by Extension</b>	Call Summary	
<b>Calls by Group</b>	Call Summary	
<b>Calls by Hour</b>	Call Summary	
<b>Calls by Phone Number</b>	Customers	
<b>Top Received Customers</b>	Customers	
<b>Top Received Numbers</b>	Customers	
<b>Transferred Calls by Agent</b>	Customers	
<b>Top Dialed Numbers</b>	Customers	
<b>Global Service Level</b>	Service Level	Yes
<b>Global Service Level by Day</b>	Service Level	Yes
<b>Global Service Level by Hour</b>	Service Level	Yes
<b>Trunk Activity</b>	Trunk Activity	

## Call Recording Add-on

Trunk Call Recording add-on taps call conversations that take place on different trunks either Analog, E1/T1 ISDN, or SIP.

Call Recording represents an essential component for every company that does care about staff training, reducing conflicts and avoiding potential liabilities.

You can easily search for a specific call recording by quick strings, extension, date and time, line number, caller ID information, calling name, and more.

Embedded audio player can reproduce the voice conversation of each call segment by its associated time offset.

## Call Segmentation and Licensed Extensions Approach

### ***PBX Monitoring***

Call Accounting monitors all incoming and outgoing PBX calls, not intercom calls.

The monitored incoming and outgoing calls are restricted by the number of the extensions permitted by purchased license, as explained in the section [Licensed Extensions](#) below.

Call Accounting presents all the PBX devices the call gets through along with their associated call segments.

The following types of PBX devices are monitored:

- **PBX Extensions**
- **ACD Groups**
- **PBX Trunks**
- **Other** devices, such as VM Groups and VM Ports

A PBX device is presented in logs along with its following attributes:

- **Device Number**, such as 601, 123, or 18642779219
- **Device Name**, such as John, CA Mobile, Jane, DID US, or John's Mobile
- **Device Group**, such as Support, Sales, or Marketing
- **Device Type**, such as Extension, Group, Trunk, or Other

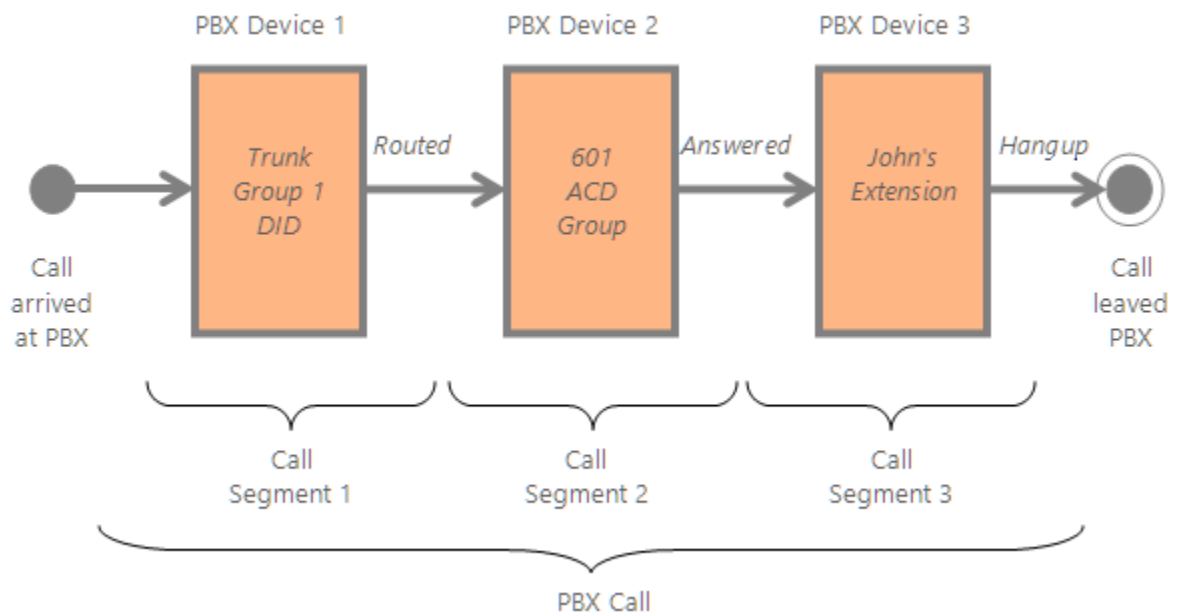
### ***Call Segmentation***

A PBX call is presented in logs along with its following attributes:

- **Call ID**
- **Call Time** and **Date**
- **Phone** as Dialed number or Caller ID, depending on the call direction
- **Duration** of the entire PBX call
- The time the call was **Answered after**
- **Talk Time** of the PBX call

A PBX call can include one or more call segments, depending on the number of the PBX devices the call got through.

For example, an incoming call arrived at PBX from the telephony service provider at *Trunk Group 1 DID* device, it is routed to *601 ACD Group* device, and finally the call is answered by *John's Extension* device, which hang-ups after 22 minutes of conversation, for example:



A call segment is presented in logs along with its following attributes:

- The **Time Offset** of the call segment relative to the beginning of the call
- The associated **Device** with its attributes
- **Duration** of the current call segment
- **Talk Time** of the current call segment
- **Status** of the call segment after leaved the PBX device

### ***Licensed Extensions***

Call Accounting allows you to configure which PBX extensions are licensed, up to the limit associated to the product edition you have purchased.

#### **RULE:**

**If a call segment gets through one licensed extension at least for a specific PBX call, the PBX call is stored and presented by Call Accounting in the call logs and call reports.**

**Otherwise, the PBX call is discarded.**

# ACTIVATING PRODUCT

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You must activate Call Accounting product using the product Activation Code provided by Poltys according to the purchased license before logging in.

## Prerequisites

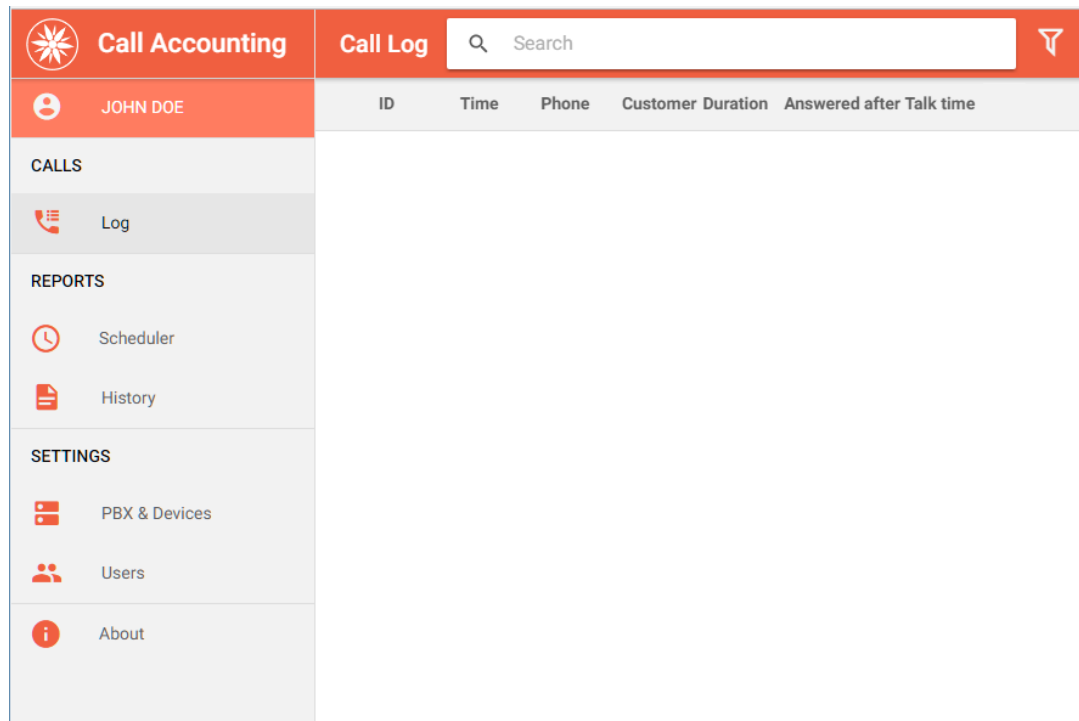
Before activating Call Accounting, please make sure that:

- All designated users must have **active internet connection** in order to use Call Accounting
- You and all designated users must use the latest version of **Google Chrome** browser
- **All installation steps and suggestions** presented in the Call Accounting Installation Manual **have been properly accomplished**
- You have been provided with the **product Activation Key** (AK) by Poltys according to the purchased license

## Log In

### To login to Call Accounting

1. Enter the URL <http://hosting.poltys.com/ccs> in the address bar of Chrome browser.
2. The Call Accounting landing page displays. If you have already registered with us, just sign in.
3. The main screen of the Call Accounting product displays.

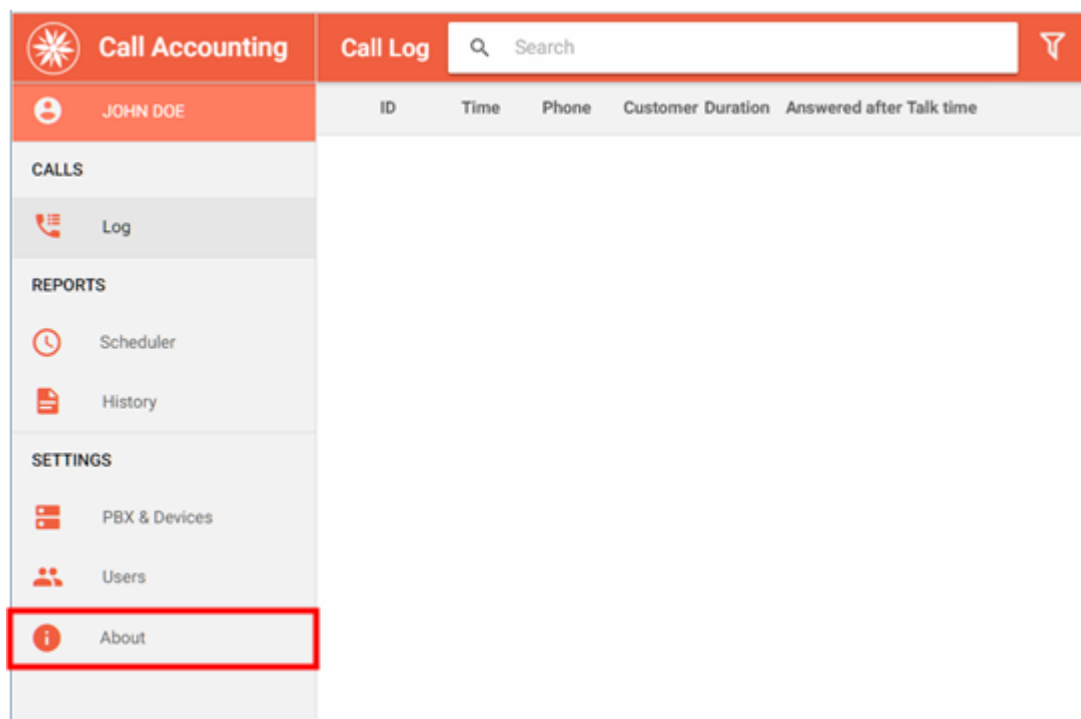


**NOTE: You can log in at any time to Call Accounting product using the Customer account credentials: Email and Password.**

## About

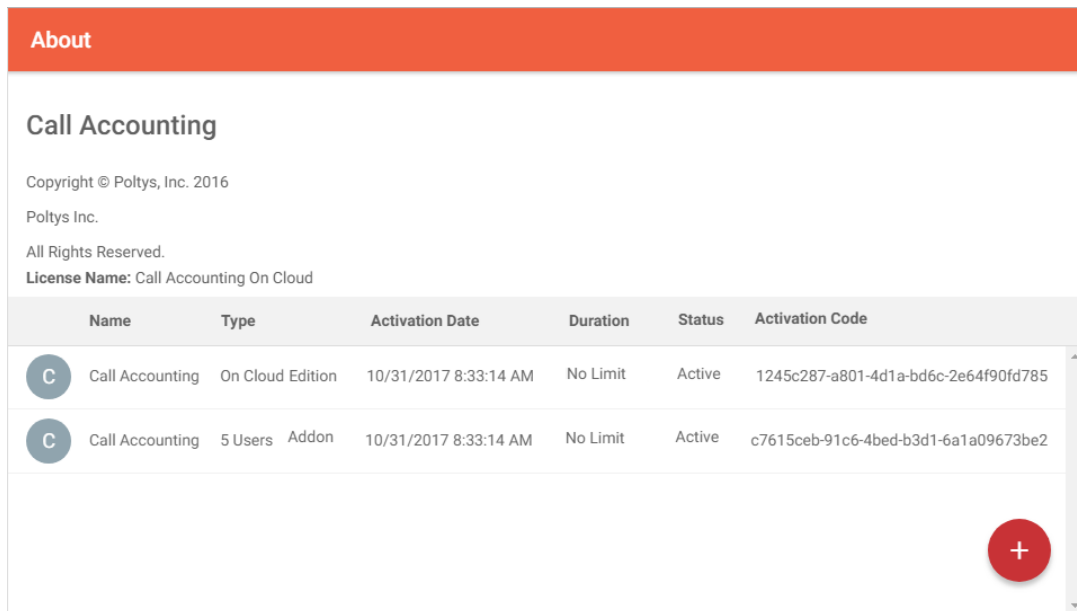
### To find out information about Call Accounting

1. Click on the **About** button located in the left control panel.





2. The *About* screen displays, presenting all activated licenses for the current product edition.



**About**

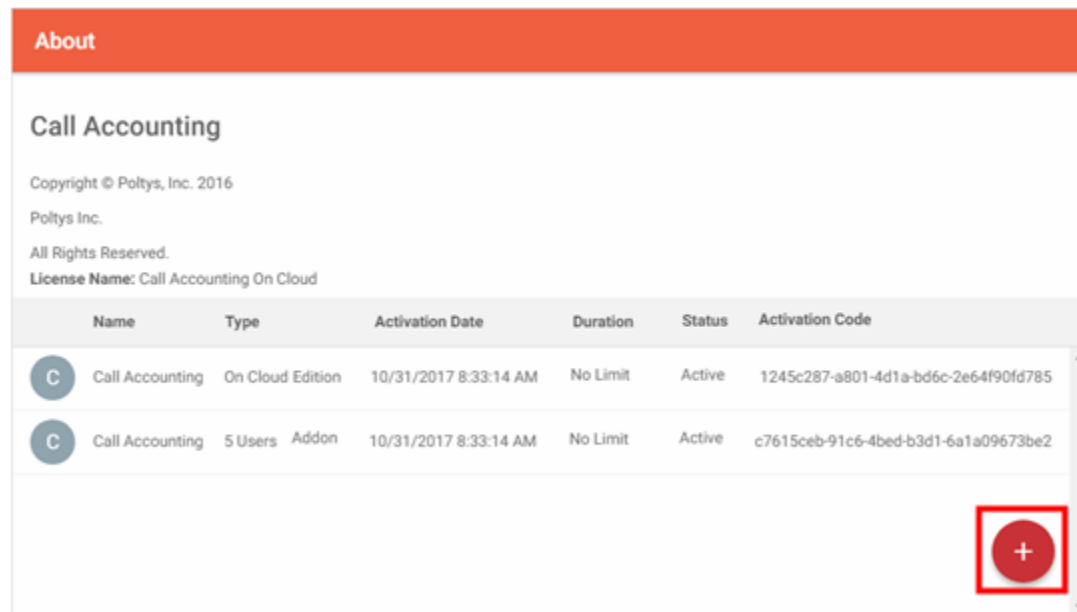
### Call Accounting

Copyright © Poltys, Inc. 2016  
 Poltys Inc.  
 All Rights Reserved.  
 License Name: Call Accounting On Cloud

Name	Type	Activation Date	Duration	Status	Activation Code
Call Accounting	On Cloud Edition	10/31/2017 8:33:14 AM	No Limit	Active	1245c287-a801-4d1a-bd6c-2e64f90fd785
Call Accounting	5 Users Addon	10/31/2017 8:33:14 AM	No Limit	Active	c7615ceb-91c6-4bed-b3d1-6a1a09673be2

+

3. You can add new licenses for the current product by clicking on the **Add new activation code** button.



**About**

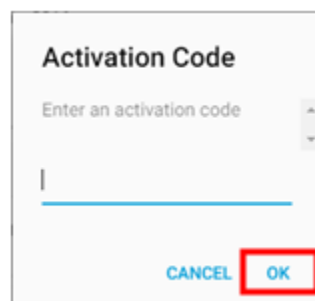
### Call Accounting

Copyright © Poltys, Inc. 2016  
 Poltys Inc.  
 All Rights Reserved.  
 License Name: Call Accounting On Cloud

Name	Type	Activation Date	Duration	Status	Activation Code
Call Accounting	On Cloud Edition	10/31/2017 8:33:14 AM	No Limit	Active	1245c287-a801-4d1a-bd6c-2e64f90fd785
Call Accounting	5 Users Addon	10/31/2017 8:33:14 AM	No Limit	Active	c7615ceb-91c6-4bed-b3d1-6a1a09673be2

+

4. The *Activation Code* screen displays. Enter the new license key and click on **OK** button.



**Activation Code**

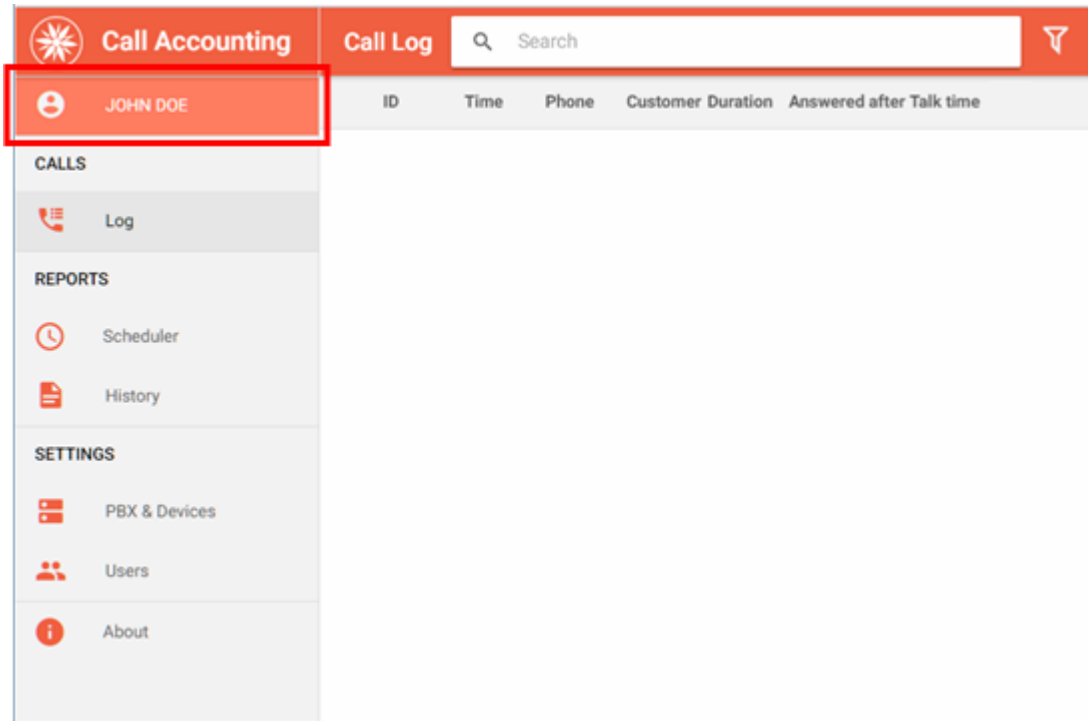
Enter an activation code

CANCEL OK

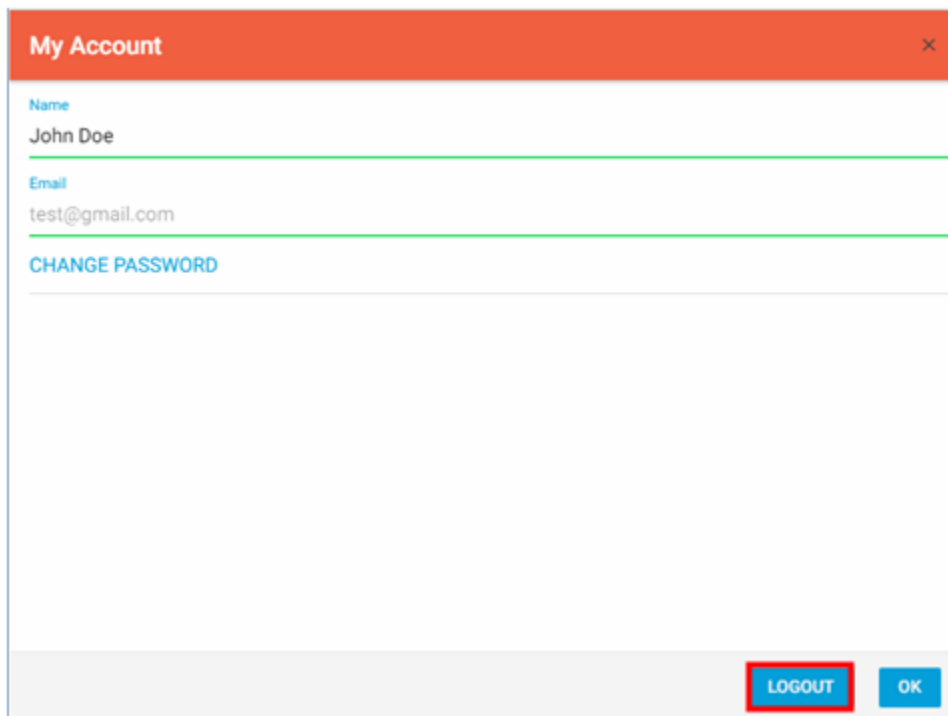
## Log Out

### To logout from Call Accounting

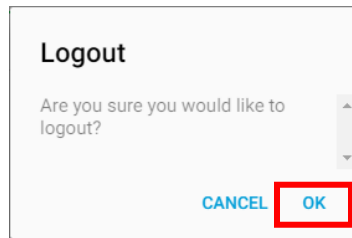
1. Click on the **My Account** button located in the left upper corner.



2. The *My Account* screen displays. Click on the **Logout** button.



3. You are asked to confirm the operation. Click on **OK** button.



4. You are logged out from Call Accounting product.

# CONFIGURING USERS

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You can create as many users of Call Accounting product as they are required.

## Create New Users

The *Super User* of Call Accounting product is the user that activated the system.

The *Super User* have full access rights in the system. Refer to [Users and Access Rights to Resources](#) section for more information.

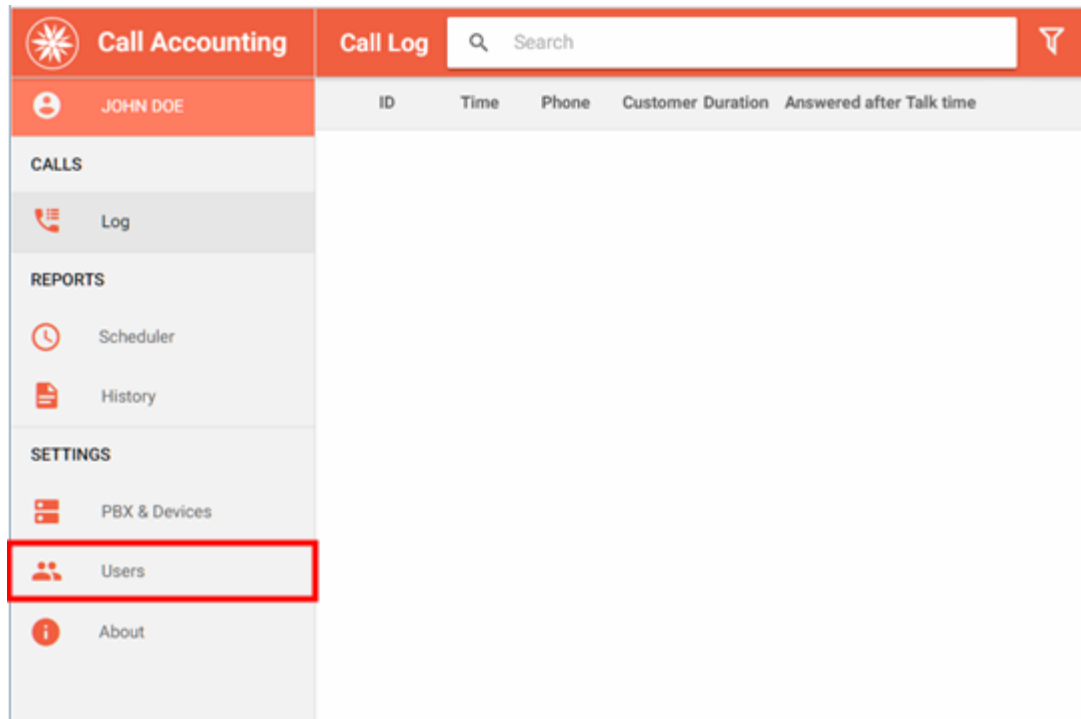
The *Super User* can create other Call Accounting users if required, with the following roles:

- **Admin** - full access to product features
- **Supervisor** - full access to product features, except for *Settings* and *About* sections

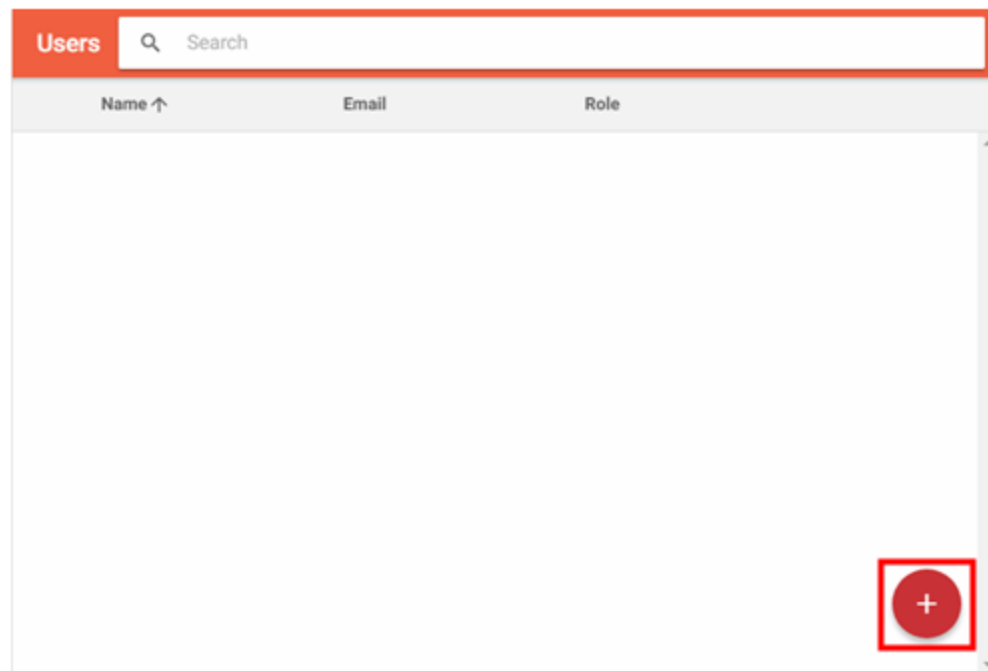
Product Feature	Admin Role	Supervisor Role
Calls   Log	Yes	Yes
Reports   Scheduler	Yes	Yes
Reports   History	Yes	Yes
Reports   Templates	Yes	Yes
Settings   PBX & Devices	Yes	
Settings   Users	Yes	
About	Yes	
Help	Yes	Yes

### To create new user

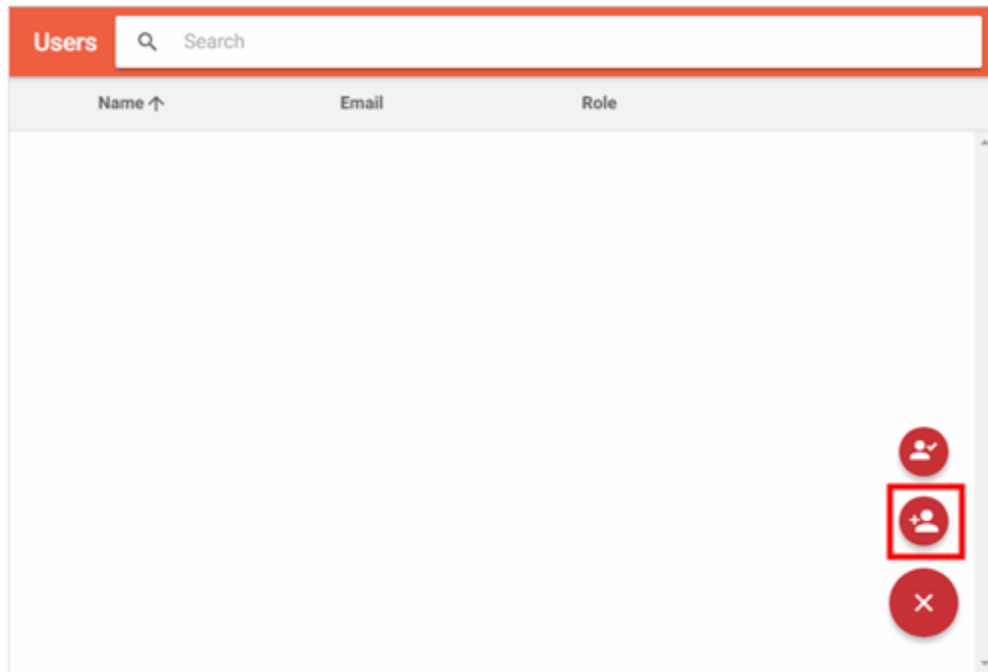
1. Click on **Users** button on the left control panel.



2. The *Users* screen displays. Click on **Add** button.



3. Click on **New User** button.

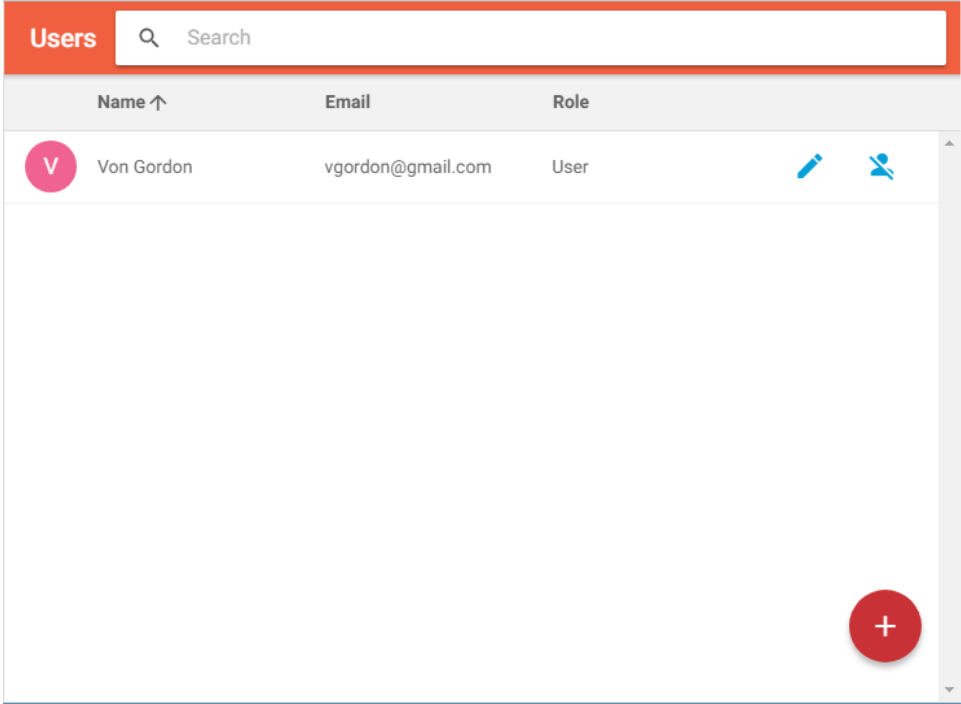


**NOTE: If the user you want to add already has an account with Poltys, you must add him/ her to Call Accounting product by clicking on Add User button.**

4. The *New User* screen displays. Enter *Name*, *Email*, *Password*, and *Role* for the new user. Click on **OK** button.

A screenshot of a 'New User' form. The form has a red header bar with the text 'New User' and a close button (X). The form contains several input fields: 'Name' with the value 'Von Gordon', 'Email' with the value 'vgordon@gmail.com', 'Password' with masked characters '\*\*\*\*\*', and 'Re-type password' with masked characters '\*\*\*\*\*'. Below these is a 'Role' dropdown menu with 'User' selected. At the bottom right of the form, there is a blue 'OK' button highlighted with a red square.

5. The new user is created and added to the list.



## NOTES:

**You may edit or delete any user in the list using the related buttons.**

**By default, a new user comes with Can Change Access rights.**

## Users and Access Rights

Different users of the system may have different access rights to Call Accounting resources.

Call Accounting resources are PBX devices and historical reports. The access rights are defined per resource.

The following user access rights are defined in Call Accounting:

User Access Right	Description
Is Owner	<ul style="list-style-type: none"> <li>Can delete resource</li> <li>Can change ownership of resource</li> <li>Can change access rights to resource</li> <li>Can access (view) resource</li> </ul>
Can Change Access	<ul style="list-style-type: none"> <li>Can change access rights to resource</li> <li>Can access (view) resource</li> </ul>
Can Access	<ul style="list-style-type: none"> <li>Can access (view) resource</li> </ul>
No Access	<ul style="list-style-type: none"> <li>No access to resource</li> </ul>

**NOTE: Only one user in the system have Owner access rights. By default, the Super User of system is Owner of the system resources.**

The user access rights work like additional filter criteria in call log and reports.

**RULES:**

- **In call logs, if a call segment gets thru one device at least the user has access to for a specific PBX call, the entire call is presented to that user.**
- **In call logs, if all call segments enter devices the user has no access to for a specific PBX call, the call is NOT presented to that user.**
- **In historical reports that are based on templates organized by PBX devices (e.g. Calls by DID, Calls by Extension, Calls by Group, etc.), the PBX devices with no access rights are NOT presented to that user.**

Refer to [To change user access rights for PBX devices](#) section for more details.



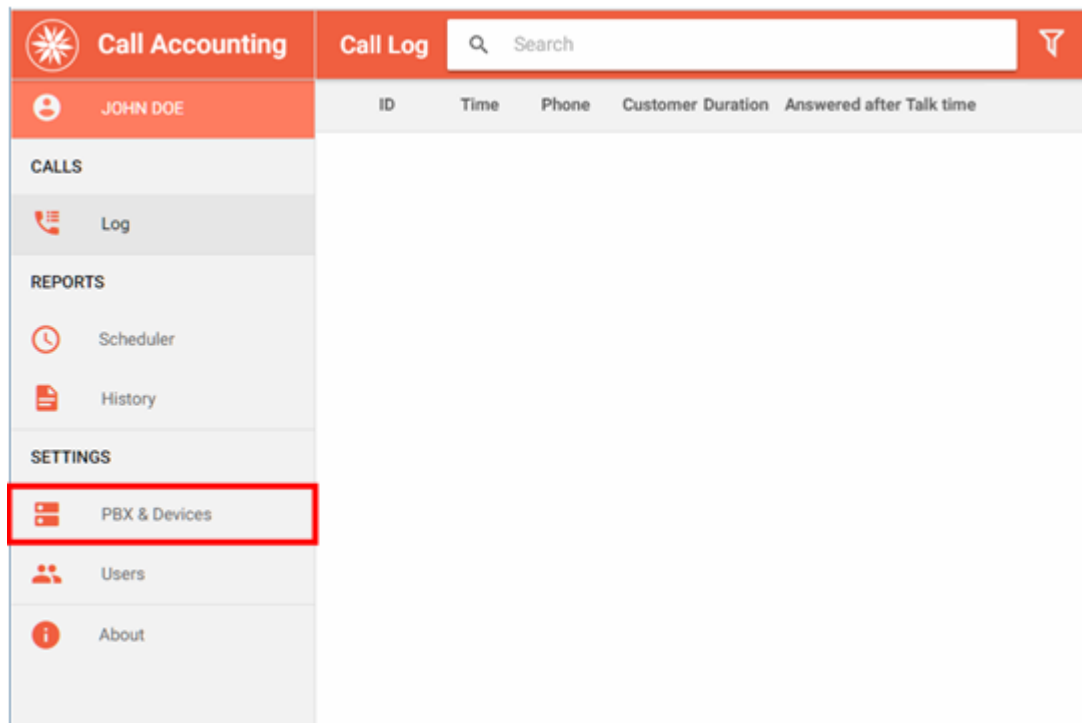
# CONFIGURING PBX AND DEVICES

You can connect Call Accounting to one or more PBXs, according to the purchased license.

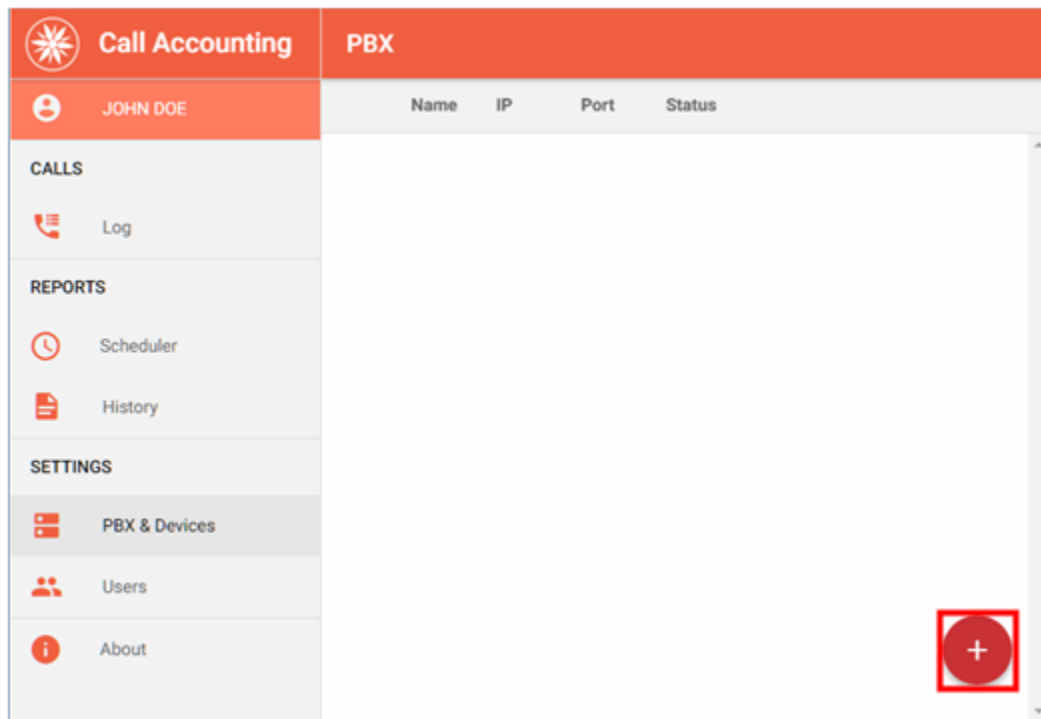
## Connect to PBX

### To connect Call Accounting to PBX

1. Click on the **PBX & Devices** button in the left panel.



2. **PBX** screen displays. Click on **Add PBX** button located on the right bottom corner.

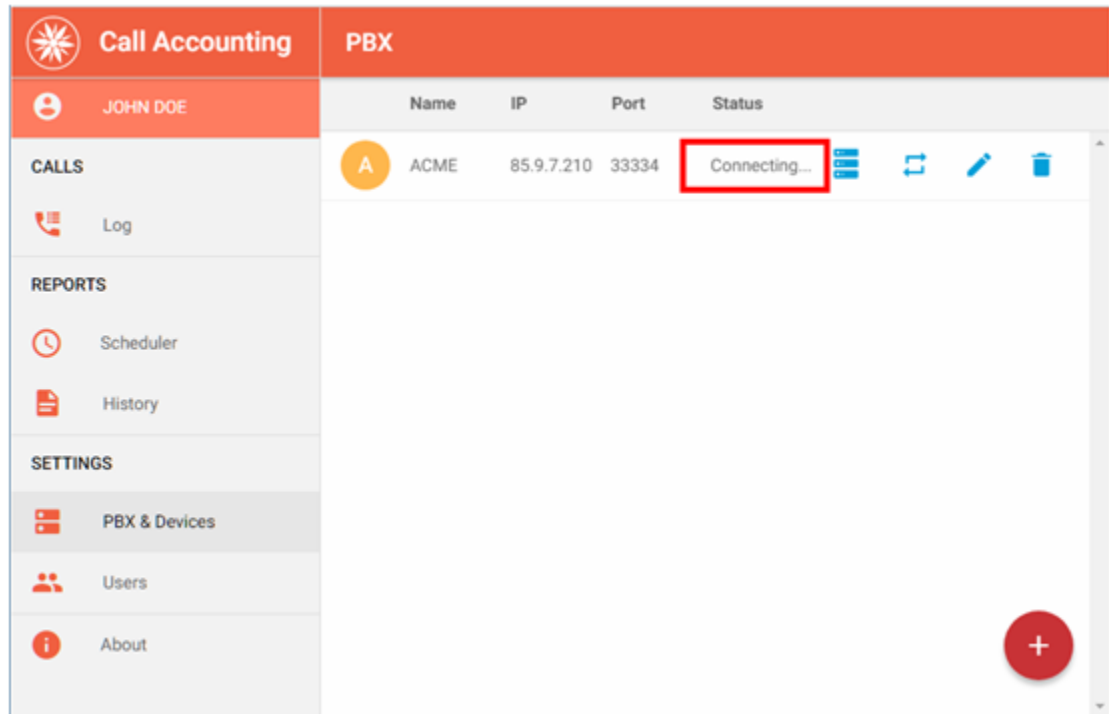


3. The *New PBX* screen displays. Enter the *Name* of the PBX of your choice, the public *IP Address* and the *PBX CTI Port* number. Click on **OK** button.

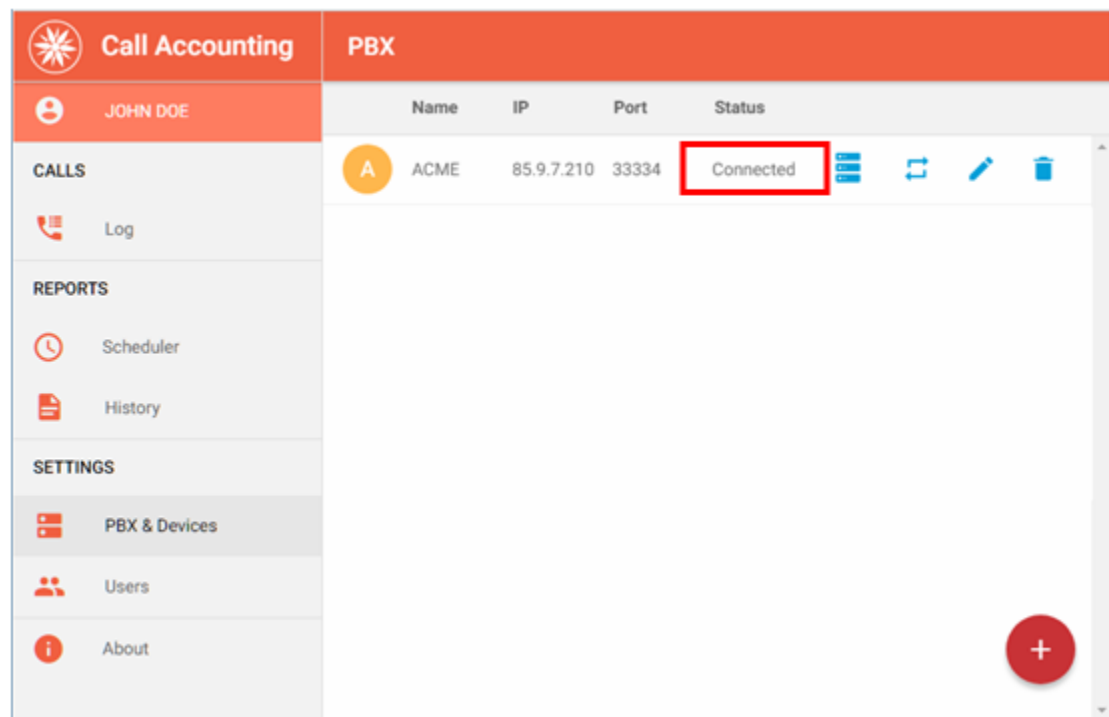
The screenshot shows a 'New PBX' dialog box. It has three input fields: 'Name' with the value 'ACME', 'IP' with the value '85.9.7.210', and 'Port' with the value '33334'. These three fields are grouped together and highlighted by a red rectangle. At the bottom right of the dialog box, there is a blue 'OK' button, which is also highlighted by a red rectangle.

**NOTE:** IP Address is the fixed public address for granting Call Accounting access to PBX and the PBX CTI Port shall be forwarded in the company router, as described in the *Call Accounting Installation Manual*.

- The new PBX is added to the list and Call Accounting tries to establish connection with it, displaying the progress status accordingly.



- Wait for few moments and check the progress status in the list.
- If everything went OK, Call Accounting successfully connected to PBX.



**NOTE: If no connection is established, please check IP Address and PBX CTI Port.**

**NOTE: You can connect Call Accounting to multiple PBXs, using the same procedure above.**

## Configure PBX Devices

Call Accounting provides *automatic detection of all PBX devices*. This feature saves substantial amount of time before going up and running with Call Accounting.

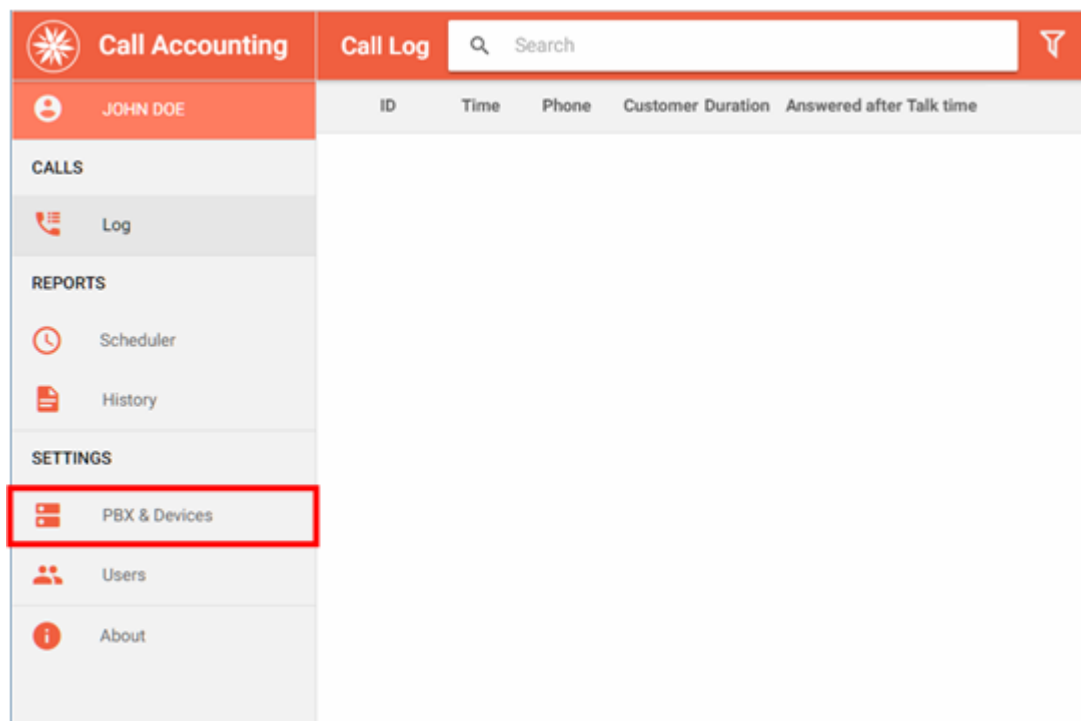
The devices are detected during the calls are carried out by PBX and they automatically added and stored to the PBX devices list as they are configured internally in each PBX.

Call Accounting starts PBX devices monitoring as they are detected and added to the PBX devices list.

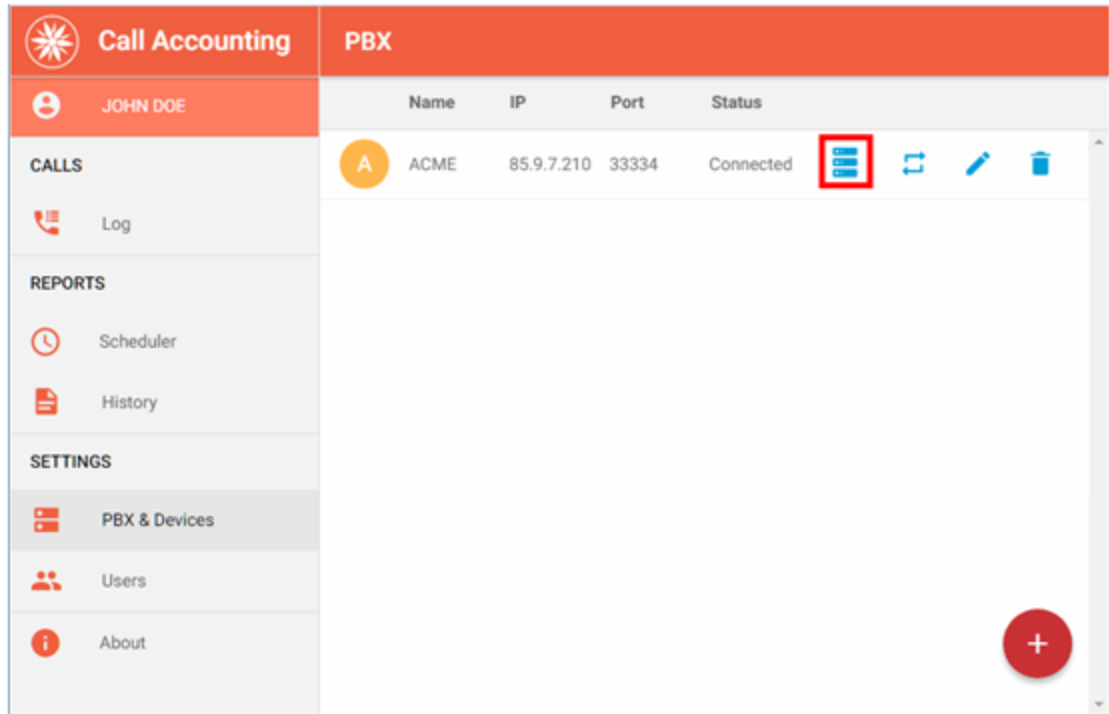
### To change PBX device attributes

You can manually change some attributes of PBX devices in the list, if required, depending on the device type. This feature is mostly useful when you changed some attributes in the PBX for a device already detected by Call Accounting. You must maintain synchronization between attributes of the devices in the PBX and Call Accounting.

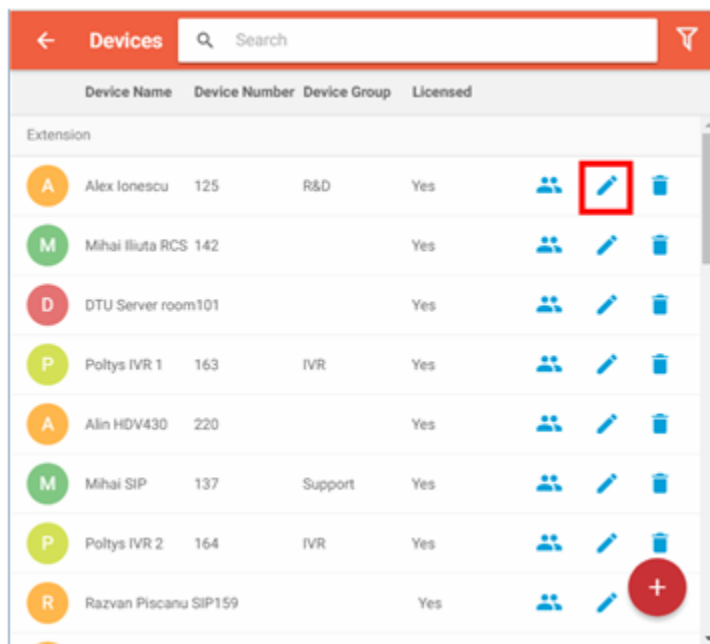
1. Click on the **PBX & Devices** button in the left control panel.



2. Click on the **Edit Devices** button for the PBX you want to configure.



3. The list of PBX devices detected so far displays. Click on **Edit Device** button of the PBX device you want to change.



4. The *Edit Device* screen displays.

You can change *Device Name* and *Device Number* to match the new settings you might carried out in the PBX.

The screenshot shows a web form titled "Edit Device" with a close button (X) in the top right corner. The form contains several input fields: "Type", "Extension", "Device Name" (containing "Alex Ionescu"), "Device Number" (containing "125"), "Device Group" (containing "R&D"), and a "Licensed" toggle switch (currently turned on). A red rectangular box highlights the "Device Name" and "Device Number" fields. An "OK" button is located at the bottom right of the form.

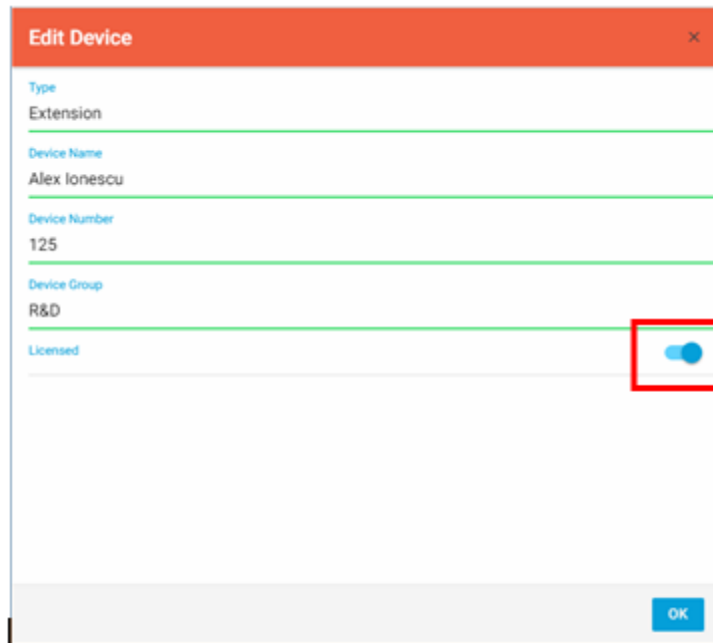
5. The *Device Group* field comes empty by default after the detection of PBX device, but can be very useful to define it for reporting purposes. Therefore, you can define skill groups in your company and measure their activity and performances separately, e.g. Support, Sales, etc.

This screenshot is identical to the one above, showing the "Edit Device" form. In this version, a red rectangular box highlights the "Device Group" field, which contains the text "R&D". All other fields and the "OK" button remain the same.

6. The PBX extensions come with additional *Licensed* attribute.

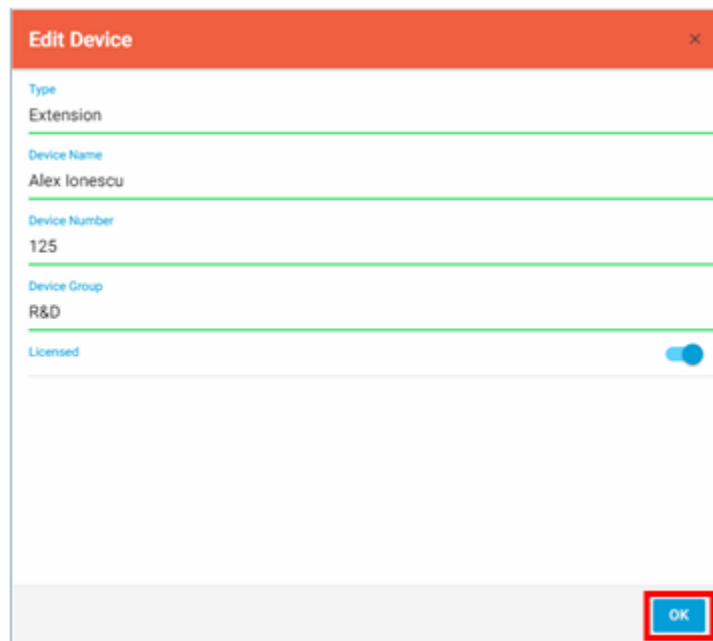
If a call segment gets through one *Licensed* extension at least for a specific PBX call, the PBX call is stored and presented by Call Accounting in the call logs and call reports. Otherwise, the PBX call is discarded.

You can manually configure which extensions shall be monitored up to the limit dictated by the license purchased.



The screenshot shows a web form titled "Edit Device" with a close button (X) in the top right corner. The form contains several input fields, each with a label in blue text above it: "Type" (with "Extension" entered), "Device Name" (with "Alex Ionescu" entered), "Device Number" (with "125" entered), and "Device Group" (with "R&D" entered). Below these is a "Licensed" toggle switch, which is currently turned on (blue). This toggle switch is highlighted with a red rectangular box. At the bottom right of the form is a blue "OK" button.

7. Click on **OK** button for changes to take effect.



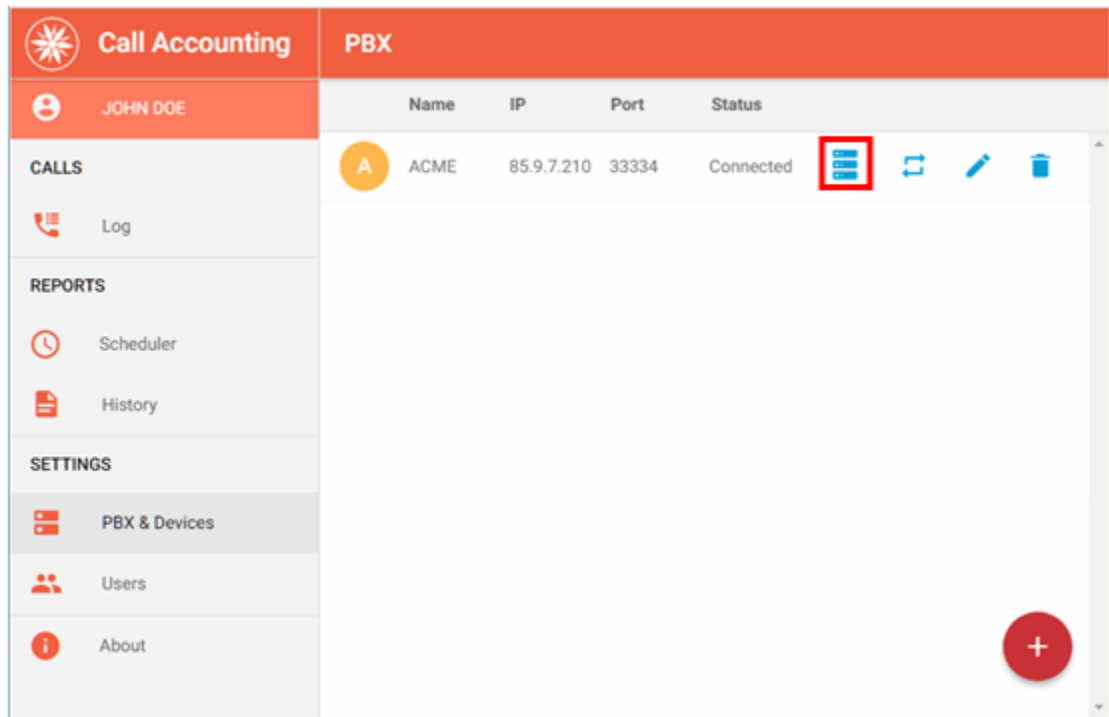
This screenshot shows the same "Edit Device" form as above, but with the "Licensed" toggle switch moved to the right side of the form. The blue "OK" button at the bottom right is now highlighted with a red rectangular box.

### To manually add PBX extension

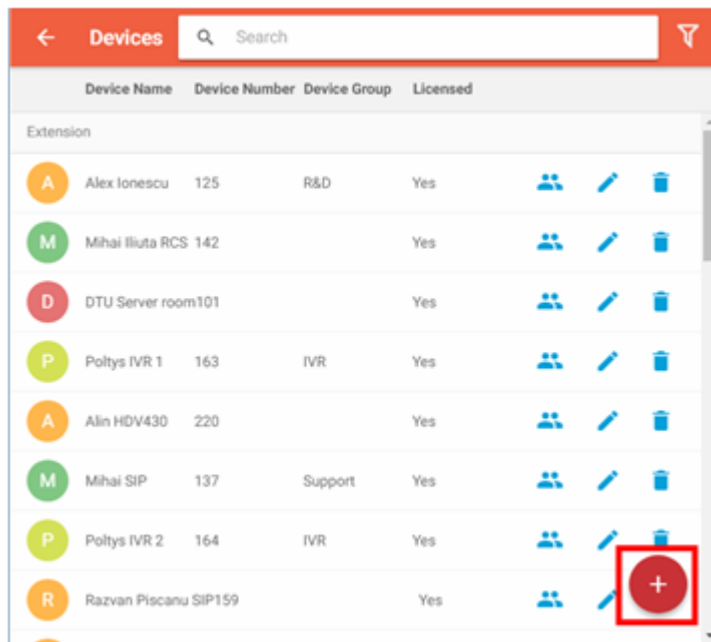
You can manually add PBX extensions, if required.

This feature is useful when you want to monitor only certain extensions in the PBX and you have purchased a Call Accounting license with limited number of extensions to be monitored.

1. Click on the **Edit Devices** button for the PBX you want to configure.

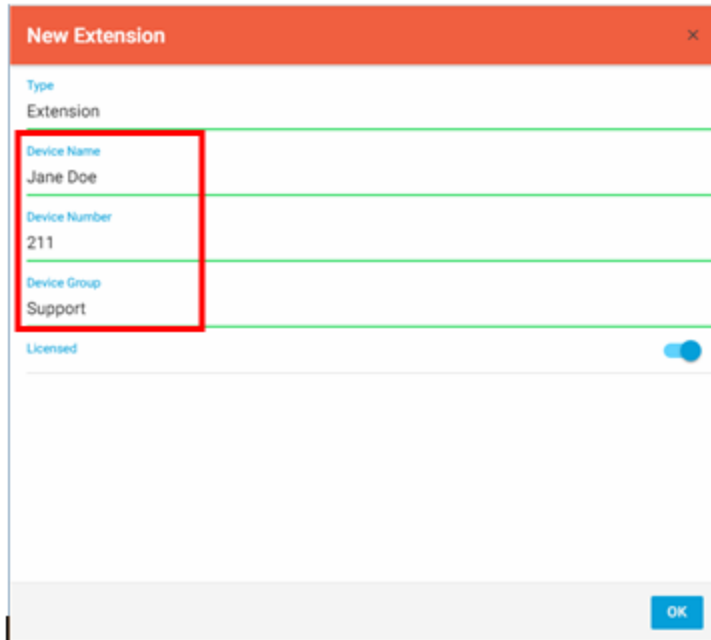


2. The list of PBX devices detected so far displays. Click on **New Extension** button.



3. The *Edit Device* screen displays. Enter *Device Name*, *Device Number*, and *Device Group* of the new extension.



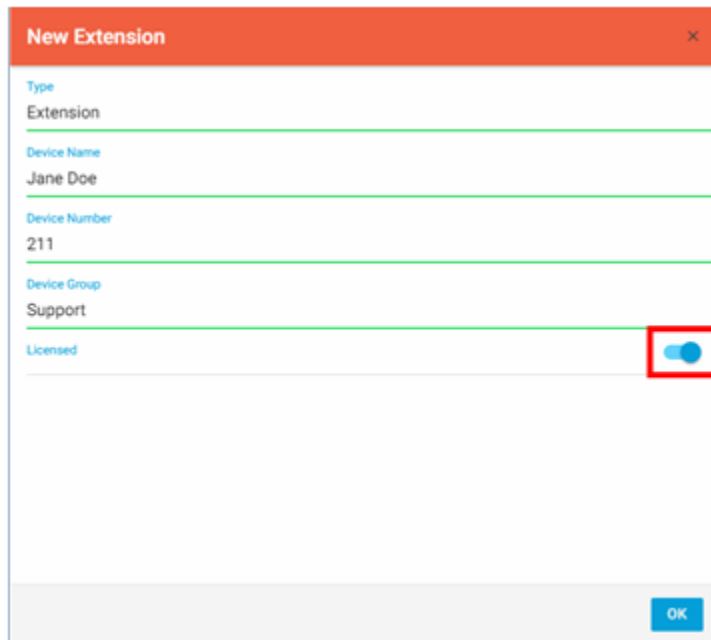


The 'New Extension' dialog box is shown with the following fields and values:

Field	Value
Type	Extension
Device Name	Jane Doe
Device Number	211
Device Group	Support
Licensed	<input checked="" type="checkbox"/>

An 'OK' button is located at the bottom right of the dialog.

4. Enable *Licensed* option.

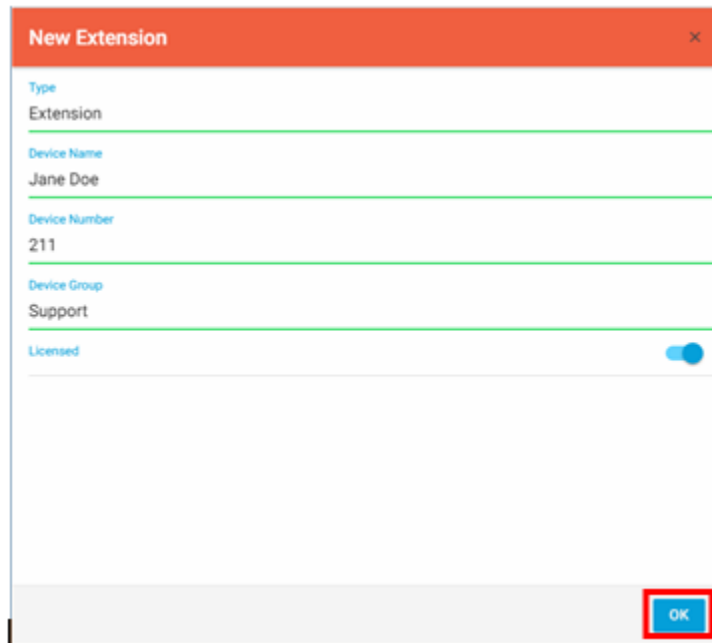


The 'New Extension' dialog box is shown with the following fields and values:

Field	Value
Type	Extension
Device Name	Jane Doe
Device Number	211
Device Group	Support
Licensed	<input checked="" type="checkbox"/>

The 'Licensed' toggle is highlighted with a red box. An 'OK' button is located at the bottom right of the dialog.

5. Click on **OK** button for changes to take effect.



**New Extension**

Type  
Extension

Device Name  
Jane Doe

Device Number  
211

Device Group  
Support

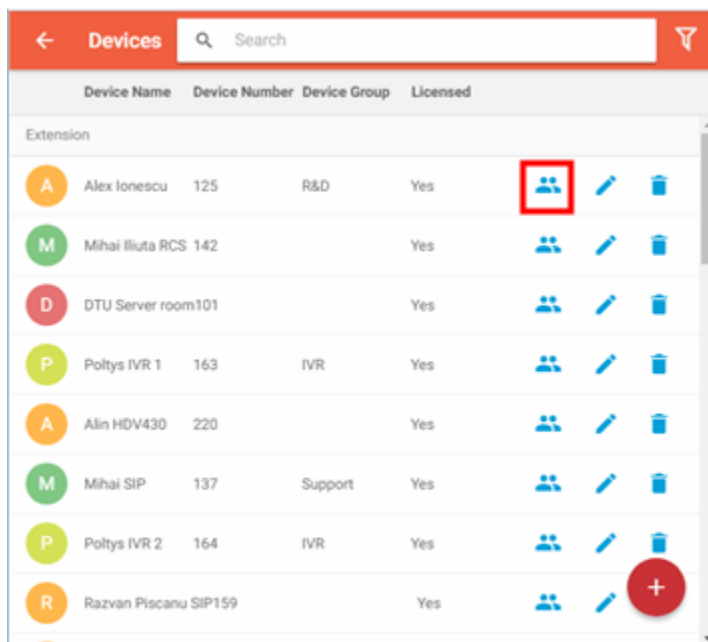
Licensed ☒

OK

### To change user access rights for PBX devices

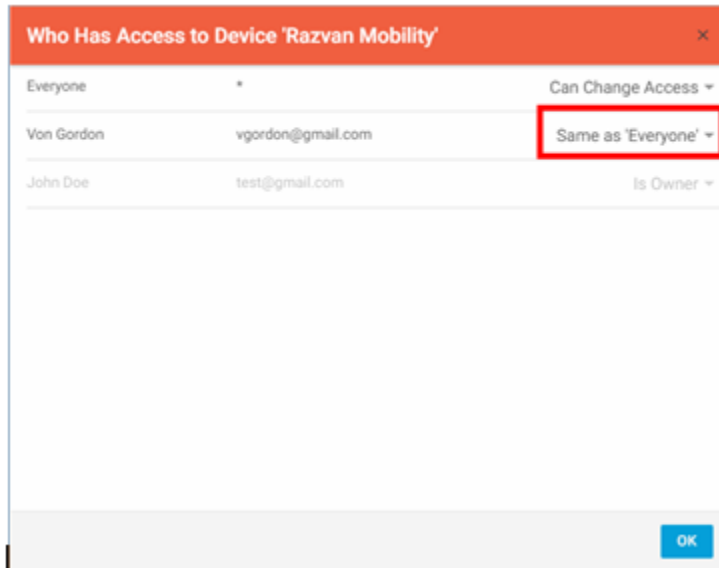
By default, all users defined in the system have *Can Change Access* rights on all PBX devices. For more information refer to [Users and Access Rights](#) section.

1. Click on **Device Access** button of the PBX device you want to change.



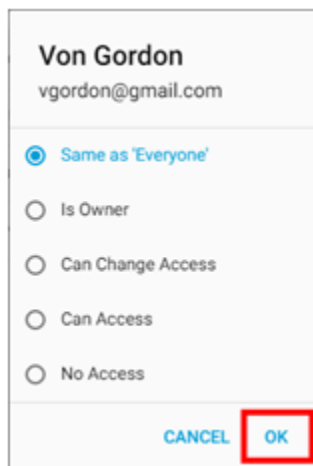
←	Devices	Search	
Device Name	Device Number	Device Group	Licensed
Extension			
A Alex Ionescu	125	R&D	Yes
M Mihai Iliuta RCS	142		Yes
D DTU Server room	101		Yes
P Poltys IVR 1	163	IVR	Yes
A Alin HDV430	220		Yes
M Mihai SIP	137	Support	Yes
P Poltys IVR 2	164	IVR	Yes
R Razvan Piscanu SIP	159		Yes

2. *Who Has Access to Device* screen displays. The list presents all users defined in the system. By default, a new user comes with *Same as Everyone* access rights to the current device. If you want the change the access rights of a certain user for the current PBX device, click on **Same as 'Everyone'** button of the PBX device you want to change.



**NOTE: *Everyone* is a general modifier of access rights of multiple users in the system which are set to *Same as 'Everyone'*.**

3. The *Access Rights* screen display for the selected user. Select the new access rights from the list, for example *No Access*, and then click on **OK** button:



4. The new access rights are saved in the database and updated in the list. Click on **OK** button for changes to take effect.

Who Has Access to Device 'Razvan Mobility' ×

Everyone	*	Can Change Access ▾
Von Gordon	vgordon@gmail.com	No Access ▾
John Doe	test@gmail.com	Is Owner ▾

OK

Repeat steps 1 to 4 for each PBX device you want to change.

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# CALL LOGGING

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You can inspect the entire PBX activity by Call Log.

## Browse Call Log

Call Accounting monitors the PBX activity and stores the call information into internal database.

You can access the call history at anytime using *Call Log*.

The *Direction* and *Status* of calls are presented as follows:

-  **Incoming call**, hung up after call connected
-  **Incoming call**, hung up before call connected
-  **Outgoing call**, hung up after call connected
-  **Outgoing call**, hung up before call connected

The following general call attributes are presented in the list: *ID*, *Date* and *Time*, *Phone* dialed or *Caller ID*, *Customer* name, *Duration*, *Answered after* time, and *Talk time*.

The total number of the calls in the Call Log list displays as well in the Call Log.

### To Browse Call Log

1. Click on the **Log** button in the left panel.



Call Log <input type="text" value="Search"/>							
ID	Time	Phone	Customer	Duration	Answered after	Talk time	2010 Calls
11 January 2018							
✓ 2019	2:35:11 AM	18009001380		00m 42s	00m 00s	00m 42s	+
✓ 2018	1:30:31 AM	12087779367		00m 12s	00m 00s	00m 12s	+
10 January 2018							
↗ 2017	11:39:38 PM	16047219682		01m 18s	00m 03s	01m 15s	+
↗ 2016	11:38:57 PM	16047219682		00m 24s	00m 03s	00m 21s	+
↗ 2015	11:37:46 PM	16047219682		00m 31s	00m 03s	00m 28s	+
↗ 2014	11:37:19 PM	16047219682		00m 24s	00m 03s	00m 21s	+
↗ 2013	11:36:52 PM	16047219682		00m 22s	00m 03s	00m 19s	+
✓ 2012	11:33:08 PM	16047219682		02m 33s	00m 00s	02m 33s	+
↗ 2011	11:01:35 PM	6047219682		06m 24s	00m 02s	06m 22s	+

4. The call item expands and all associated call segments display with details.

Call Log <input type="text" value="Search"/>																																							
ID	Time	Phone	Customer	Duration	Answered after	Talk time	2010 Calls																																
11 January 2018																																							
✓ 2019	2:35:11 AM	18009001380		00m 42s	00m 00s	00m 42s	—																																
<table> <tr> <th>Time Offset</th><th>Device Number</th><th>Device Name</th><th>Device Group</th><th>Device Type</th><th>Duration</th><th>Talk time</th><th>Status</th></tr> <tr> <td>00m 00s</td><td colspan="3">Polys 3 (TrGrp 1)Vodafone Lines Sales</td><td>Trunk</td><td>00m 00s</td><td>00m 00s</td><td>Routed</td></tr> <tr> <td>00m 00s</td><td>608</td><td>Polys IVR</td><td>Support</td><td>Group</td><td>00m 00s</td><td>00m 00s</td><td>Answered</td></tr> <tr> <td>00m 00s</td><td>163</td><td>Polys IVR 1</td><td>IVR</td><td>Extension</td><td>00m 42s</td><td>00m 42s</td><td>Hangup</td></tr> </table>								Time Offset	Device Number	Device Name	Device Group	Device Type	Duration	Talk time	Status	00m 00s	Polys 3 (TrGrp 1)Vodafone Lines Sales			Trunk	00m 00s	00m 00s	Routed	00m 00s	608	Polys IVR	Support	Group	00m 00s	00m 00s	Answered	00m 00s	163	Polys IVR 1	IVR	Extension	00m 42s	00m 42s	Hangup
Time Offset	Device Number	Device Name	Device Group	Device Type	Duration	Talk time	Status																																
00m 00s	Polys 3 (TrGrp 1)Vodafone Lines Sales			Trunk	00m 00s	00m 00s	Routed																																
00m 00s	608	Polys IVR	Support	Group	00m 00s	00m 00s	Answered																																
00m 00s	163	Polys IVR 1	IVR	Extension	00m 42s	00m 42s	Hangup																																
✓ 2018	1:30:31 AM	12087779367		00m 12s	00m 00s	00m 12s	+																																
10 January 2018																																							
↗ 2017	11:39:38 PM	16047219682		01m 18s	00m 03s	01m 15s	+																																
↗ 2016	11:38:57 PM	16047219682		00m 24s	00m 03s	00m 21s	+																																

5. The following call segment attributes display: *Time Offset*, *Device Number*, *Device Name*, *Device Group*, *Duration*, *Talk time*, and *Status*.

## Quick Search

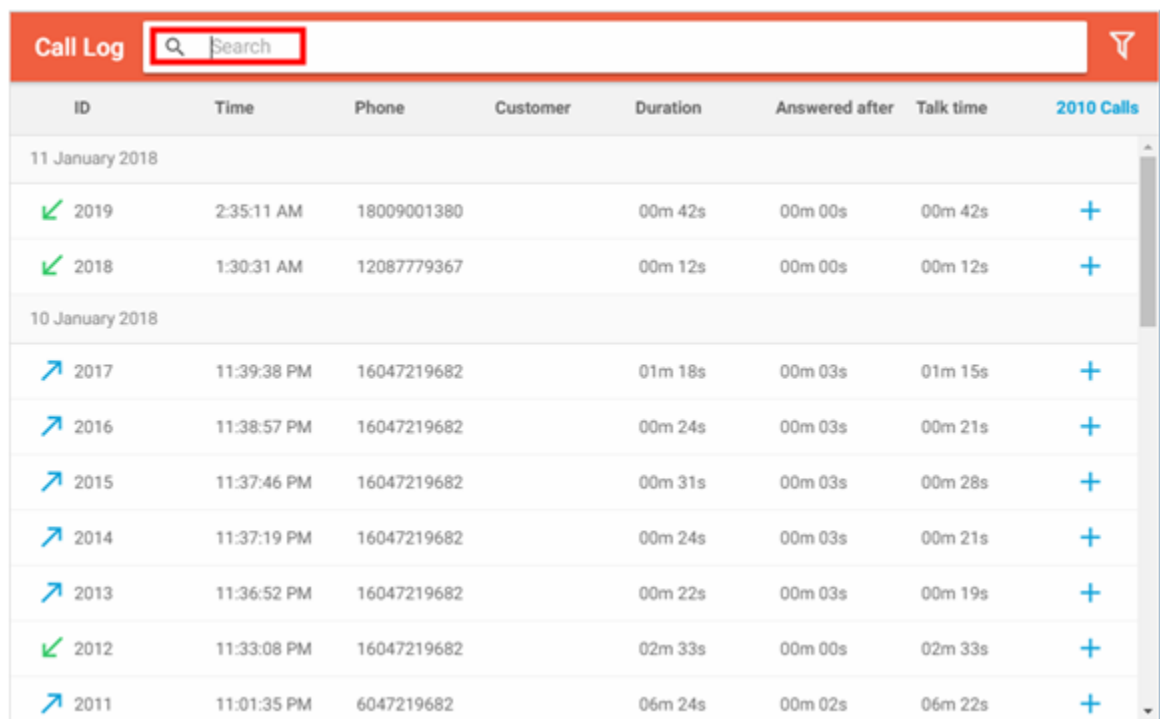
Call Accounting lets you search at a snap for an alphanumeric text in string attributes of a call and subsequent call segments.

The following call string attributes are considered at quick search operation:

- Call level: *Phone, Customer*
- Call segment level: *Device Number, Device Name, Device Group*

### To quick search for calls

1. Click on the *Search* field. Enter the text you are looking for.



Call Log <input type="text" value="Search"/>							
ID	Time	Phone	Customer	Duration	Answered after	Talk time	2010 Calls
11 January 2018							
✓ 2019	2:35:11 AM	18009001380		00m 42s	00m 00s	00m 42s	+
✓ 2018	1:30:31 AM	12087779367		00m 12s	00m 00s	00m 12s	+
10 January 2018							
↗ 2017	11:39:38 PM	16047219682		01m 18s	00m 03s	01m 15s	+
↗ 2016	11:38:57 PM	16047219682		00m 24s	00m 03s	00m 21s	+
↗ 2015	11:37:46 PM	16047219682		00m 31s	00m 03s	00m 28s	+
↗ 2014	11:37:19 PM	16047219682		00m 24s	00m 03s	00m 21s	+
↗ 2013	11:36:52 PM	16047219682		00m 22s	00m 03s	00m 19s	+
✓ 2012	11:33:08 PM	16047219682		02m 33s	00m 00s	02m 33s	+
↗ 2011	11:01:35 PM	6047219682		06m 24s	00m 02s	06m 22s	+

2. All Calls that have the specified text in their string attributes display. Also, the number of calls returned in the list is presented in the upper-right corner.



Call Log							
<input type="text" value="1604"/> <span>×</span> <span>🔍</span>							
ID	Time	Phone	Customer	Duration	Answered after	Talk time	63 Calls
10 January 2018							
↗ 2017	11:39:38 PM	16047219682		01m 18s	00m 03s	01m 15s	+
↗ 2016	11:38:57 PM	16047219682		00m 24s	00m 03s	00m 21s	+
↗ 2015	11:37:46 PM	16047219682		00m 31s	00m 03s	00m 28s	+
↗ 2014	11:37:19 PM	16047219682		00m 24s	00m 03s	00m 21s	+
↗ 2013	11:36:52 PM	16047219682		00m 22s	00m 03s	00m 19s	+
✓ 2012	11:33:08 PM	16047219682		02m 33s	00m 00s	02m 33s	+
✓ 2009	10:19:52 PM	16047219682		03m 07s	00m 20s	02m 47s	+
✗ 2008	10:19:48 PM	16047219682		00m 00s	00m 00s	00m 00s	+
✗ 2007	10:19:43 PM	16047219682		00m 05s	00m 00s	00m 00s	+
29 December 2017							

## Filter Call Log

Call Accounting lets you apply multiple data filters in order to locate the call information of interest from the internal database.

One or more filters can be applied on the call log information, as follows:

- **Start Date**
- Call **Type**
- **Duration**
- **Answered after**
- **Talk time**
- **Device Group**
- **Device Number**
- **Device Name**
- Call **Status**
- **PBX Name**

### To apply a filter to Call Log

1. Click on **Display Filter** button.

Call Log							
Search							
ID	Time	Phone	Customer	Duration	Answered after	Talk time	2010 Calls
11 January 2018							
✓ 2019	2:35:11 AM	18009001380		00m 42s	00m 00s	00m 42s	+
✓ 2018	1:30:31 AM	12087779367		00m 12s	00m 00s	00m 12s	+
10 January 2018							
↗ 2017	11:39:38 PM	16047219682		01m 18s	00m 03s	01m 15s	+
↗ 2016	11:38:57 PM	16047219682		00m 24s	00m 03s	00m 21s	+
↗ 2015	11:37:46 PM	16047219682		00m 31s	00m 03s	00m 28s	+
↗ 2014	11:37:19 PM	16047219682		00m 24s	00m 03s	00m 21s	+
↗ 2013	11:36:52 PM	16047219682		00m 22s	00m 03s	00m 19s	+
✓ 2012	11:33:08 PM	16047219682		02m 33s	00m 00s	02m 33s	+
↗ 2011	11:01:35 PM	6047219682		06m 24s	00m 02s	06m 22s	+

2. The *Filters* panel displays. Select the filter of your choice, *Start Date* for example.

Call Log					Filters	
Search						
ID	Time	Phone	Customer	Duration		
11 January 2018					Start Date +	
✓ 2019	2:35:11 AM	18009001380		00m 42s	Type +	
✓ 2018	1:30:31 AM	12087779367		00m 12s	Duration +	
10 January 2018					Answered after +	
↗ 2017	11:39:38 PM	16047219682		01m 18s	Talk time +	
↗ 2016	11:38:57 PM	16047219682		00m 24s	Device Group +	
↗ 2015	11:37:46 PM	16047219682		00m 31s	Device Number +	
↗ 2014	11:37:19 PM	16047219682		00m 24s	Device Name +	
↗ 2013	11:36:52 PM	16047219682		00m 22s		
✓ 2012	11:33:08 PM	16047219682		02m 33s		
↗ 2011	11:01:35 PM	6047219682		06m 24s		

3. The filter *Start Date* expands.

The screenshot shows the 'Call Log' interface with a search bar and a 'Filters' panel on the right. The 'Filters' panel is open, and the 'Last week' option is selected, indicated by a red box. The 'Start Date' is set to '01/01/2017'.

ID	Time	Phone	Customer	Duration
11 January 2018				
✓ 2019	2:35:11 AM	18009001380		00m 42s
✓ 2018	1:30:31 AM	12087779367		00m 12s
10 January 2018				
↗ 2017	11:39:38 PM	16047219682		01m 18s
↗ 2016	11:38:57 PM	16047219682		00m 24s
↗ 2015	11:37:46 PM	16047219682		00m 31s
↗ 2014	11:37:19 PM	16047219682		00m 24s
↗ 2013	11:36:52 PM	16047219682		00m 22s
✓ 2012	11:33:08 PM	16047219682		02m 33s
↗ 2011	11:01:35 PM	6047219682		06m 24s

**Filters**

Start Date —

- ☐ Today
- ☐ Yesterday
- ☐ This week
- ☒ Last week
- ☐ This month
- ☐ Last month
- ☐ This year
- ☐ Last year
- ☐ 01/01/2017 - 01/01/2017
- ☐ In last N months 0
- ☐ Exact date 01/01/2017

Type +

4. Select the date option of your choice, *Last Week* for example.

The screenshot shows the 'Call Log' interface with a search bar and a 'Filters' panel on the right. The 'Filters' panel is open, and the 'Last week' option is selected, indicated by a red box. The 'Start Date' is set to '01/01/2017'.

ID	Time	Phone	Customer	Duration
7 January 2018				
✓ 1919	9:44:21 PM	18435012321		01m 10s
✗ 1918	9:44:12 PM	18435012321		00m 05s
✓ 1917	12:25:27 AM	18009001380		00m 42s
5 January 2018				
✓ 1916	10:59:15 PM	13076826105		03m 05s
✗ 1914	10:59:12 PM	13076826105		00m 00s
✗ 1915	10:59:07 PM	13076826105		00m 05s
↗ 1912	10:03:42 PM	4509233000		00m 03s
↗ 1913	10:03:41 PM	19053019132		49m 49s
✓ 1911	9:20:46 PM	19053019132		01m 51s

**Filters**

Start Date —

- ☐ Today
- ☐ Yesterday
- ☐ This week
- ☒ Last week
- ☐ This month
- ☐ Last month
- ☐ This year
- ☐ Last year
- ☐ 01/01/2017 - 01/01/2017
- ☐ In last N months 0
- ☐ Exact date 01/01/2017

Type +

5. Call Log is filtered out instantly. Click somewhere on the area outside the filter panel to view the entire Call Log.

Call Log <input type="text" value="Search"/>							
ID	Time	Phone	Customer	Duration	Answered after	Talk time	131 Calls
7 January 2018							
✓ 1919	9:44:21 PM	18435012321		01m 10s	00m 20s	00m 50s	+
✗ 1918	9:44:12 PM	18435012321		00m 05s	00m 00s	00m 00s	+
✓ 1917	12:25:27 AM	18009001380		00m 42s	00m 00s	00m 42s	+
5 January 2018							
✓ 1916	10:59:15 PM	13076826105		03m 05s	00m 20s	02m 45s	+
✗ 1914	10:59:12 PM	13076826105		00m 00s	00m 00s	00m 00s	+
✗ 1915	10:59:07 PM	13076826105		00m 05s	00m 00s	00m 00s	+
↗ 1912	10:03:42 PM	4509233000		00m 03s	00m 00s	00m 00s	+
↗ 1913	10:03:41 PM	19053019132		49m 49s	00m 03s	49m 44s	+
✓ 1911	9:20:46 PM	19053019132		01m 51s	00m 20s	01m 31s	+

**NOTE: When you have at least one filter applied to the Call Log, the Display Filter button displays in blue color.**

### To apply more filters to Call Log

1. Click on **Display Filter** button.

Call Log <input type="text" value="Search"/>							
ID	Time	Phone	Customer	Duration	Answered after	Talk time	131 Calls
7 January 2018							
✓ 1919	9:44:21 PM	18435012321		01m 10s	00m 20s	00m 50s	+
✗ 1918	9:44:12 PM	18435012321		00m 05s	00m 00s	00m 00s	+
✓ 1917	12:25:27 AM	18009001380		00m 42s	00m 00s	00m 42s	+
5 January 2018							
✓ 1916	10:59:15 PM	13076826105		03m 05s	00m 20s	02m 45s	+
✗ 1914	10:59:12 PM	13076826105		00m 00s	00m 00s	00m 00s	+
✗ 1915	10:59:07 PM	13076826105		00m 05s	00m 00s	00m 00s	+
↗ 1912	10:03:42 PM	4509233000		00m 03s	00m 00s	00m 00s	+
↗ 1913	10:03:41 PM	19053019132		49m 49s	00m 03s	49m 44s	+
✓ 1911	9:20:46 PM	19053019132		01m 51s	00m 20s	01m 31s	+

2. The *Filters* panel displays. Select the filter of your choice, *Type* for example.

Call Log					Filters	
Search						
ID	Time	Phone	Customer	Duration		
7 January 2018					Start Date	+
✓ 1919	9:44:21 PM	18435012321		01m 10s	Type	+
✗ 1918	9:44:12 PM	18435012321		00m 05s	Duration	+
✓ 1917	12:25:27 AM	18009001380		00m 42s	Answered after	+
5 January 2018					Talk time	+
✓ 1916	10:59:15 PM	13076826105		03m 05s	Device Group	+
✗ 1914	10:59:12 PM	13076826105		00m 00s	Device Number	+
✗ 1915	10:59:07 PM	13076826105		00m 05s	Device Name	+
↗ 1912	10:03:42 PM	4509233000		00m 03s		
↗ 1913	10:03:41 PM	19053019132		49m 49s		
✓ 1911	9:20:46 PM	19053019132		01m 51s		

3. The filter *Type* expands.

Call Log					Filters	
Search						
ID	Time	Phone	Customer	Duration		
7 January 2018					Start Date	+
✓ 1919	9:44:21 PM	18435012321		01m 10s	Type	—
✗ 1918	9:44:12 PM	18435012321		00m 05s	<input type="checkbox"/> Incoming	
✓ 1917	12:25:27 AM	18009001380		00m 42s	<input type="checkbox"/> Outgoing	
5 January 2018					Duration	+
✓ 1916	10:59:15 PM	13076826105		03m 05s	Answered after	+
✗ 1914	10:59:12 PM	13076826105		00m 00s	Talk time	+
✗ 1915	10:59:07 PM	13076826105		00m 05s	Device Group	+
↗ 1912	10:03:42 PM	4509233000		00m 03s	Device Number	+
↗ 1913	10:03:41 PM	19053019132		49m 49s		
✓ 1911	9:20:46 PM	19053019132		01m 51s		

4. Select the date option of your choice, *Incoming* for example.

Call Log					Filters	
ID	Time	Phone	Customer	Duration		
7 January 2018					Start Date	+
✓ 1919	9:44:21 PM	18435012321		01m 10s	Type	-
✗ 1918	9:44:12 PM	18435012321		00m 05s	<input checked="" type="checkbox"/> Incoming	
✓ 1917	12:25:27 AM	18009001380		00m 42s	<input type="checkbox"/> Outgoing	
5 January 2018					Duration	+
✓ 1916	10:59:15 PM	13076826105		03m 05s	Answered after	+
✗ 1914	10:59:12 PM	13076826105		00m 00s	Talk time	+
✗ 1915	10:59:07 PM	13076826105		00m 05s	Device Group	+
✓ 1911	9:20:46 PM	19053019132		01m 51s	Device Number	+
✗ 1910	9:20:42 PM	19053019132		00m 00s		
✗ 1909	9:20:37 PM	19053019132		00m 05s		

- Call Log is filtered out instantly. You have now two filters applied: *Start Date* and *Type*. Click somewhere on the area outside the filter panel to view the entire Call Log.

Call Log							
ID	Time	Phone	Customer	Duration	Answered after	Talk time	65 Calls
7 January 2018							
✓ 1919	9:44:21 PM	18435012321		01m 10s	00m 20s	00m 50s	+
✗ 1918	9:44:12 PM	18435012321		00m 05s	00m 00s	00m 00s	+
✓ 1917	12:25:27 AM	18009001380		00m 42s	00m 00s	00m 42s	+
5 January 2018							
✓ 1916	10:59:15 PM	13076826105		03m 05s	00m 20s	02m 45s	+
✗ 1914	10:59:12 PM	13076826105		00m 00s	00m 00s	00m 00s	+
✗ 1915	10:59:07 PM	13076826105		00m 05s	00m 00s	00m 00s	+
✓ 1911	9:20:46 PM	19053019132		01m 51s	00m 20s	01m 31s	+
✗ 1910	9:20:42 PM	19053019132		00m 00s	00m 00s	00m 00s	+
✗ 1909	9:20:37 PM	19053019132		00m 05s	00m 00s	00m 00s	+

### To clear all filters applied to Call Log

- Click on **Display Filter** button.

Call Log							
Search							
ID	Time	Phone	Customer	Duration	Answered after	Talk time	65 Calls
7 January 2018							
✓ 1919	9:44:21 PM	18435012321		01m 10s	00m 20s	00m 50s	+
✗ 1918	9:44:12 PM	18435012321		00m 05s	00m 00s	00m 00s	+
✓ 1917	12:25:27 AM	18009001380		00m 42s	00m 00s	00m 42s	+
5 January 2018							
✓ 1916	10:59:15 PM	13076826105		03m 05s	00m 20s	02m 45s	+
✗ 1914	10:59:12 PM	13076826105		00m 00s	00m 00s	00m 00s	+
✗ 1915	10:59:07 PM	13076826105		00m 05s	00m 00s	00m 00s	+
✓ 1911	9:20:46 PM	19053019132		01m 51s	00m 20s	01m 31s	+
✗ 1910	9:20:42 PM	19053019132		00m 00s	00m 00s	00m 00s	+
✗ 1909	9:20:37 PM	19053019132		00m 05s	00m 00s	00m 00s	+

2. The *Filters* panel displays. Click on **Clear Filter** button.

Call Log					Filters	
Search						
ID	Time	Phone	Customer	Duration		
7 January 2018					Start Date	
✓ 1919	9:44:21 PM	18435012321		01m 10s	Type	
✗ 1918	9:44:12 PM	18435012321		00m 05s	Duration	
✓ 1917	12:25:27 AM	18009001380		00m 42s	Answered after	
5 January 2018					Talk time	
✓ 1916	10:59:15 PM	13076826105		03m 05s	Device Group	
✗ 1914	10:59:12 PM	13076826105		00m 00s	Device Number	
✗ 1915	10:59:07 PM	13076826105		00m 05s	Device Name	
✓ 1911	9:20:46 PM	19053019132		01m 51s		
✗ 1910	9:20:42 PM	19053019132		00m 00s		
✗ 1909	9:20:37 PM	19053019132		00m 05s		

3. All filters are cleared.

Call Log					Filters	
Search						
ID	Time	Phone	Customer	Duration		
11 January 2018					Start Date +	
✓ 2019	2:35:11 AM	18009001380		00m 42s	Type +	
✓ 2018	1:30:31 AM	12087779367		00m 12s	Duration +	
10 January 2018					Answered after +	
↗ 2017	11:39:38 PM	16047219682		01m 18s	Talk time +	
↗ 2016	11:38:57 PM	16047219682		00m 24s	Device Group +	
↗ 2015	11:37:46 PM	16047219682		00m 31s	Device Number +	
↗ 2014	11:37:19 PM	16047219682		00m 24s	Device Name +	
↗ 2013	11:36:52 PM	16047219682		00m 22s		
✓ 2012	11:33:08 PM	16047219682		02m 33s		
↗ 2011	11:01:35 PM	6047219682		06m 24s		



# CALL REPORTING

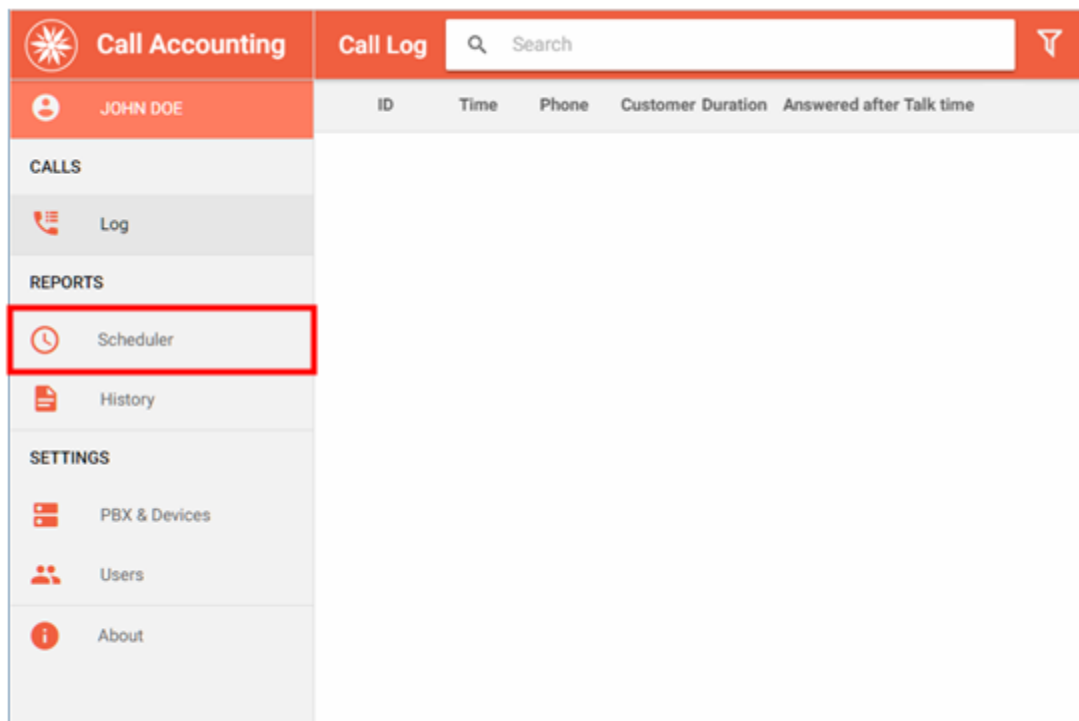
Call Accounting monitors the PBX activity and stores the call information into internal database.

You can create history reports based on predefined Excel templates. You can also create schedules to send the generated reports to Email recipients.

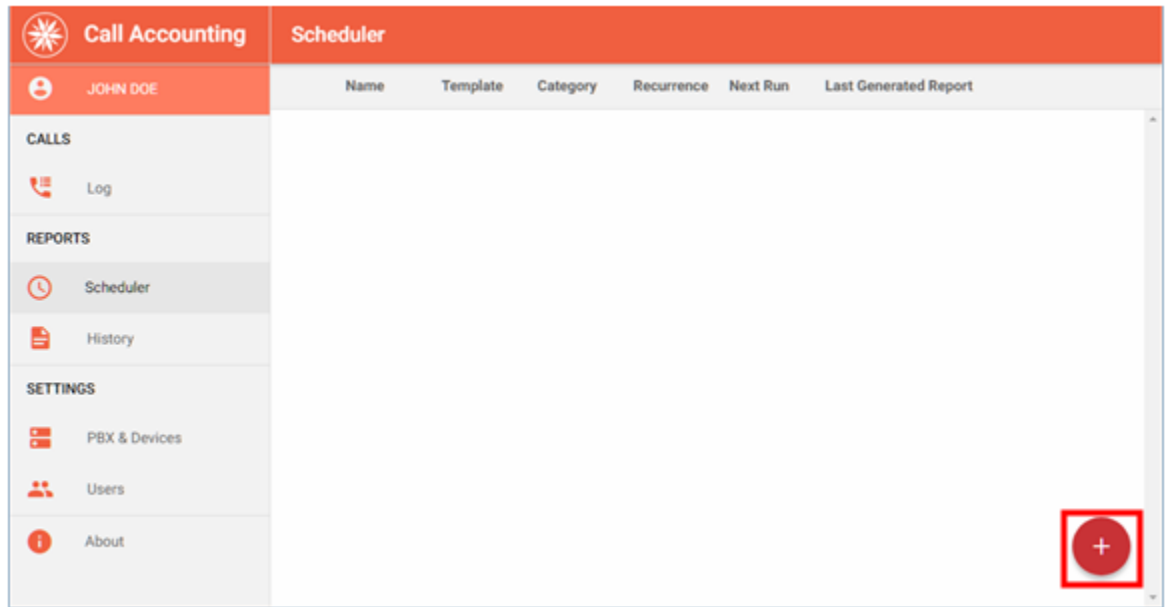
## Create Report Schedule

### To create report schedule

1. Click on the **Scheduler** button in the left panel.



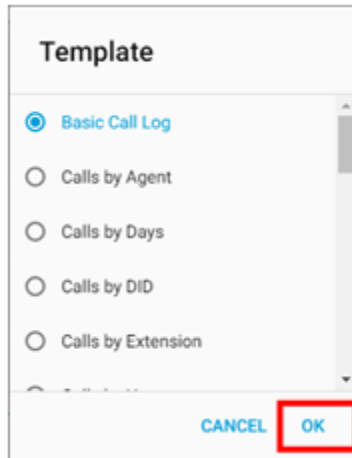
2. The list of currently defined report schedules displays. Click on **New Task** button.



3. The **New Task** screen displays. Enter the report *Name*.

The screenshot shows the 'New Task' screen. The 'Name' field is highlighted with a red box and contains the text 'New Report'. The 'Template' dropdown is set to 'Basic Call Log'. The 'Start' dropdown is set to 'Now'. The 'Stop' dropdown is set to 'After Iterations'. The 'Iterations' field is set to '1'. The 'Recurrence' dropdown is set to 'Continuously'. The 'Task Paused' checkbox is unchecked. The 'Filters' section on the right includes fields for Start Date, Type, Duration, Answered after, Talk time, Device Group, and Device Number, each with a '+' button. The bottom of the screen has 'PREVIEW' and 'OK' buttons.

4. Select the report *Template* of your choice and click on **OK** button. The full list of templates are present in the [Predefined Excel Report Templates](#) section.



**Template**

☒ Basic Call Log

☐ Calls by Agent

☐ Calls by Days

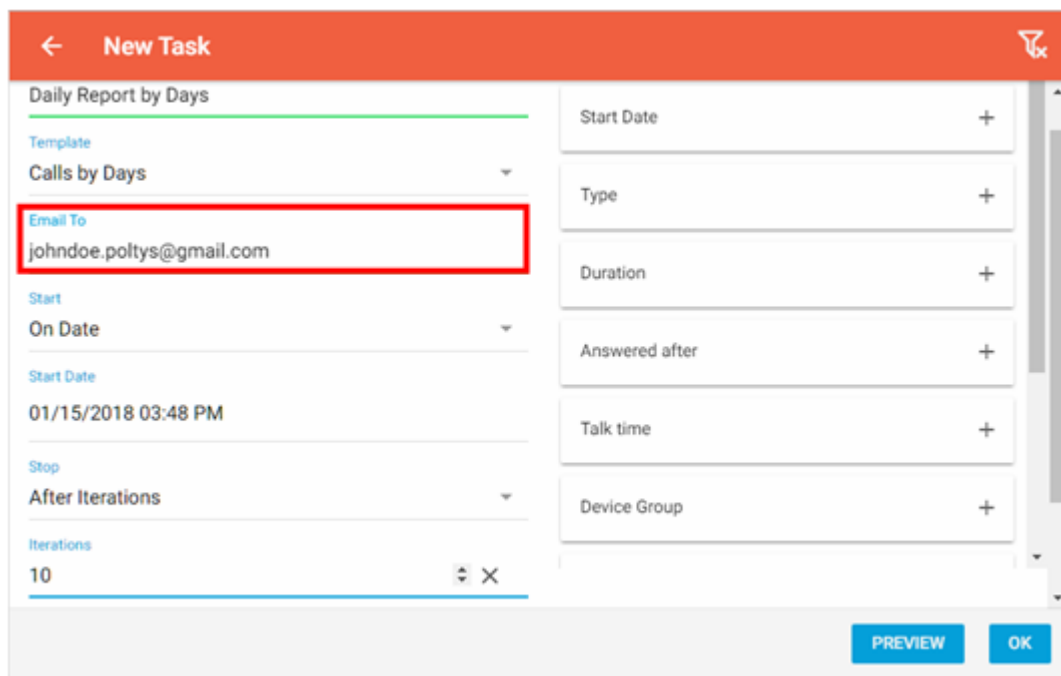
☐ Calls by DID

☐ Calls by Extension

☐ ...

CANCEL OK

- If you want to send the report to Email recipients, enter the Email address of the destination in related field.



**New Task**

Daily Report by Days

Template

Calls by Days

Email To

johndoe.poltys@gmail.com

Start

On Date

Start Date

01/15/2018 03:48 PM

Stop

After Iterations

Iterations

10

Start Date

Type

Duration

Answered after

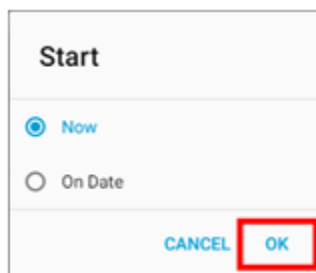
Talk time

Device Group

PREVIEW OK

**NOTE:** You can add multiple Email recipients to a schedule, separated by ";".

- Select the *Start* option of your choice and click on **OK** button.



**Start**

☒ Now

☐ On Date

CANCEL OK

- Select the effective *Start Date*, if you opted out for it. Click on **Done** button afterwards.

				CANCEL	DONE
	13		01	46	
	14		02	47	AM
01	15	2018	03	48	PM
02	16	2017	04	49	
03	17	2016	05	50	

8. Select the *Stop* option of your choice and click on **OK** button.

**Stop**

☐ No End Date

☐ On Date

☒ After Iterations

CANCEL OK

9. Select the effective *Stop Date*, if you opted out for it. Click on **Done** button afterwards.

				CANCEL	DONE
	13		01	46	
	14		02	47	AM
01	15	2018	03	48	PM
02	16	2017	04	49	
03	17	2016	05	50	

10. Select the *Recurrence*, if you opted out for *Start Now*. Click on **OK** button afterwards.

**Recurrence**

☒ Continuously

☐ On Timer

☐ Daily

☐ Weekly

☐ Monthly

CANCEL OK

11. Enter the number of *Iterations*, if you opted out for it.

The screenshot shows the 'New Task' form with the following fields and values:

- Template:** Calls by Days
- Email To:** johndoe.poltys@gmail.com
- Start Date:** 01/15/2018 03:48 PM
- After Iterations:** 10 (highlighted with a red box)
- Start Date:** 01/15/2018 03:48 PM
- Device Group:** (empty)

Buttons at the bottom: PREVIEW, OK

12. Enter the number of seconds after which the report is generated, if you opted out for *Recurrence On Timer*.

The screenshot shows the 'New Task' form with the following fields and values:

- On Date:** 01/15/2018 10:36 AM
- After Iterations:** 10
- Recurrence:** On Timer
- Every (seconds):** 1 (highlighted with a red box)
- Task Paused:** (toggle switch)

Buttons at the bottom: PREVIEW, OK

13. Enter the number of days after which the report is generated, if you opted out for *Recurrence Daily*.

← New Task

Start

On Date

Start Date

01/15/2018 10:36 AM

Stop

After Iterations

Iterations

10

Recurrence

Daily

Every (days)

1

Task Paused

Answered after +

Talk time +

Device Group +

PREVIEW OK

14. Enter on which days of week you want the report to be generated, if you opted out for *Recurrence Weekly*. Click on **OK** button afterwards.

Days

☐ Sunday

☐ Monday

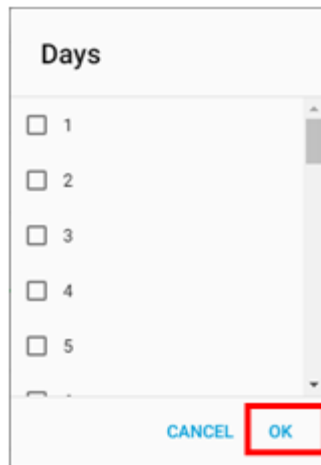
☐ Tuesday

☐ Wednesday

☐ Thursday

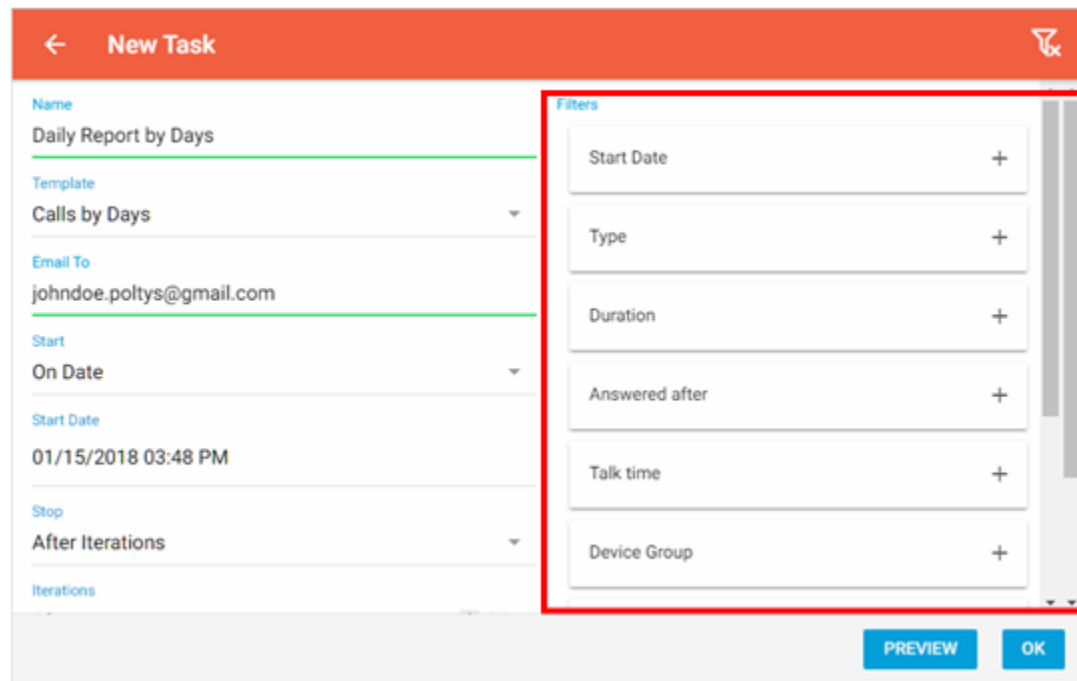
CANCEL OK

15. Enter on which days of month you want the report to be generated, if you opted out for *Recurrence Monthly*. Click on **OK** button afterwards.



A dialog box titled "Days" with a list of checkboxes numbered 1 through 5. At the bottom, there are two buttons: "CANCEL" and "OK". The "OK" button is highlighted with a red rectangular border.

16. You can filter the database information to be presented in the report using the right side of the screen. The available filters and operation are the same as for Call Log. Refer to [Filter Call Log](#) section for more information.



The "New Task" screen shows a form with fields for Name, Template, Email To, Start, and Stop. The "Filters" section on the right is highlighted with a red rectangular border. It contains a list of filterable fields: Start Date, Type, Duration, Answered after, Talk time, and Device Group, each with a plus sign (+) to its right. At the bottom right of the screen, there are two buttons: "PREVIEW" and "OK".

17. You can use **Preview** button for fine tuning of the filters.

**New Task**

**Name**  
Daily Report by Days

**Template**  
Calls by Days

**Email To**  
johndoe.poltys@gmail.com

**Start**  
**On Date**

**Start Date**  
01/15/2018 03:48 PM

**Stop**  
After Iterations

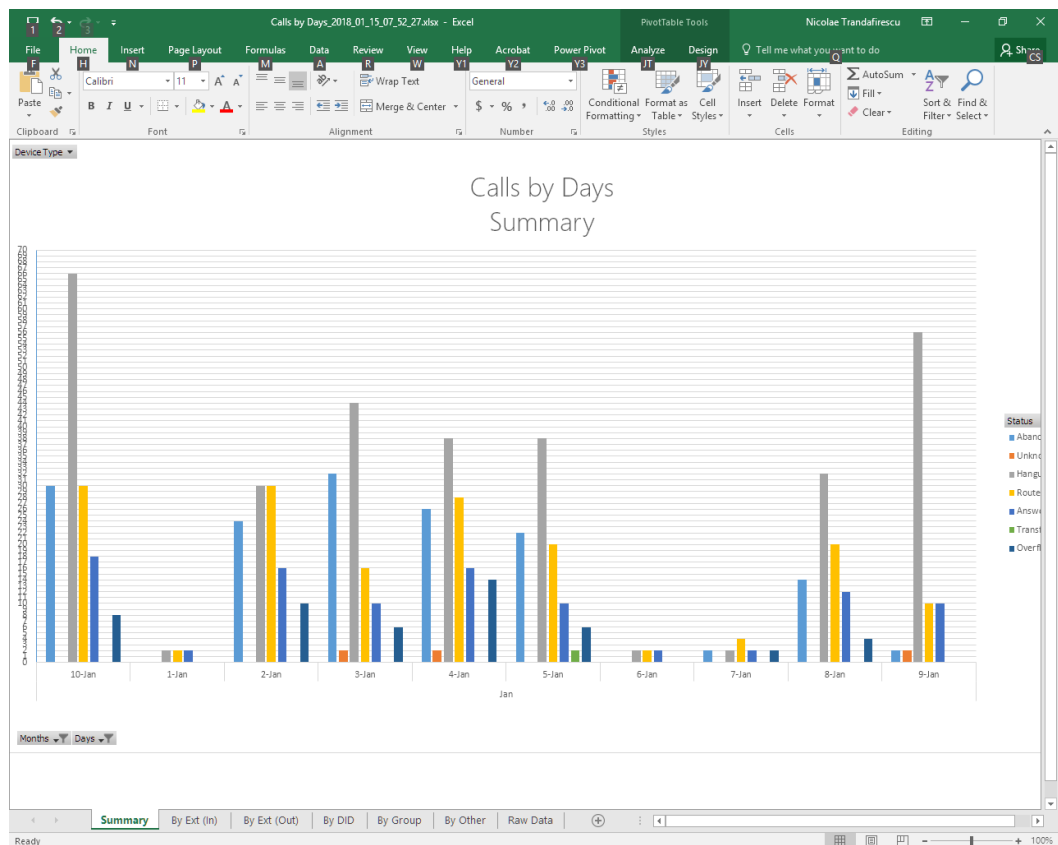
**Iterations**

**Filters**

- Start Date +
- Type +
- Duration +
- Answered after +
- Talk time +
- Device Group +

**PREVIEW** **OK**

18. Clicking on the **Preview** button initiates report generation. Then you the Excel report is downloaded. Click on the report to open it in Excel. Click on **Enable Editing** button in Excel. The worksheets refresh and present the *Summary* and *Details* information of the report.



19. Once the report schedule is properly configured, just click on **OK** button.



**New Task**

Name: Daily Report by Days

Template: Calls by Days

Email To: johndoe.poltys@gmail.com

Start: On Date

Start Date: 01/15/2018 03:48 PM

Stop: After Iterations

Iterations:

Filters:

- Start Date +
- Type +
- Duration +
- Answered after +
- Talk time +
- Device Group +

PREVIEW OK

20. A new schedule is added to the list.

Name	Template	Category	Recurrence	Next Run	Last Generated Report
D Daily Report by Days	Calls by Days	Call Summary	Stop: After 10 iterations	1/15/2018 4:53:17 PM	No Report

21. The new schedule starts running by default. You can pause it by clicking on related button at any time.

D	Daily Report by Days	Calls by Days	Call Summary	Stop: After 10 iterations	1/15/2018 4:53:17 PM	No Report	Pause	Edit	Delete
---	----------------------	---------------	--------------	---------------------------	----------------------	-----------	-------	------	--------

## Predefined Excel Report Templates

The following 25 Excel report templates are available in the Call Accounting product:

Template Name	Category	Can be customized
<b>Billing by Agent</b>	Call Log	Yes
<b>Basic Call Log General</b>	Call Log	
<b>Call Log General</b>	Call Log	
<b>Un-returned Lost Calls</b>	Call Log	
<b>Calls by Talking Time</b>	Call Summary	Yes
<b>Calls by Talking Time by Day</b>	Call Summary	Yes
<b>Calls by Talking Time by Hour</b>	Call Summary	Yes
<b>Calls by Waiting Time</b>	Call Summary	Yes
<b>Calls by Waiting Time by Day</b>	Call Summary	Yes
<b>Calls by Waiting Time by Hour</b>	Call Summary	Yes
<b>Calls by Agent</b>	Call Summary	
<b>Calls by Days</b>	Call Summary	
<b>Calls by DID</b>	Call Summary	
<b>Calls by Extension</b>	Call Summary	
<b>Calls by Group</b>	Call Summary	
<b>Calls by Hour</b>	Call Summary	
<b>Calls by Phone Number</b>	Customers	
<b>Top Received Customers</b>	Customers	
<b>Top Received Numbers</b>	Customers	
<b>Transferred Calls by Agent</b>	Customers	
<b>Top Dialed Numbers</b>	Customers	
<b>Global Service Level</b>	Service Level	Yes
<b>Global Service Level by Day</b>	Service Level	Yes
<b>Global Service Level by Hour</b>	Service Level	Yes
<b>Trunk Activity</b>	Trunk Activity	


## Create Custom Excel Report Templates

Call Accounting allows you to customize Excel Report Templates for more flexibility.


The custom templates are appended to the predefined set. Once defined, the custom Excel Report Templates can be configured and operate like the predefined ones.

## To create a custom Excel Report Template

1. Click on the **Templates** button on the left panel. The *Templates* list displays, including the predefined templates.




Call Accounting





JOHN DOE


CALLS

 Log


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 Templates

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	Category	Name	Custom			
B	Billing	Billing By Agent	No			
C	Call Log	Basic Call Log	No			
C	Call Log	Detailed Call Log	No			
C	Call Log	Un Returned Lost Calls	No			
C	Call Summary	Calls by Agent	No			
C	Call Summary	Calls by Days	No			
C	Call Summary	Calls by DID	No			
C	Call Summary	Calls by Extension	No			
C	Call Summary	Calls by Hour	No			

2. Click on **Customize Template** button that corresponds to the report template that you want to copy the information from. The *Customize Template* screen displays.




Call Accounting




JOHN DOE

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Templates

	Category	Name	Custom				
CALLS	B	Billing	Billing By Agent	No			
	C	Call Log	Basic Call Log	No			
	C	Call Log	Detailed Call Log	No			
REPORTS	C	Call Log	Un Returned Lost Calls	No			
	C	Call Summary	Calls by Agent	No			
	C	Call Summary	Calls by Days	No			
	C	Call Summary	Calls by DID	No			
	C	Call Summary	Calls by Extension	No			
	C	Call Summary	Calls by Hour	No			
	SETTINGS						

3. The *Customize Template* screen displays. You can customize the following template information:
  - Name

- Category
- Excel Report file
- Description
- SQL Query, internally used for the template at report generation

**Customize Template**

Name  
Basic Call Log New

Category  
Call Log

Excel File : BasicCallLog\_General.xlsx

Upload EXCEL  
 No file chosen

Description  
Basic Call Log with all trunk calls

Sql Query  
SET @currTimeUTC = UTC\_TIMESTAMP();  
SELECT calls.Id,  
cast(TIMESTAMPDIFF(SECOND,'1899-12-30 00:00:00',  
CONVERT\_TZ(calls.StartTime,'+00:00','SYSTEM')) as decimal(15,4))/86400,

OK

4. If you want to customize the Excel file, you have to download it firstly by clicking on the **Download** button.

**Customize Template**

Name  
Basic Call Log New

Category  
Call Log

Excel File : BasicCallLog\_General.xlsx

Upload EXCEL  
 No file chosen

Description  
Basic Call Log with all trunk calls

Sql Query  
SET @currTimeUTC = UTC\_TIMESTAMP();  
SELECT calls.Id,  
cast(TIMESTAMPDIFF(SECOND,'1899-12-30 00:00:00',  
CONVERT\_TZ(calls.StartTime,'+00:00','SYSTEM')) as decimal(15,4))/86400,

OK

5. After you have changed the Excel file locally, you have to upload it to Call Accounting server by clicking on the **Choose File** button.

**Customize Template**

Name  
Basic Call Log New

Category  
Call Log

Excel File : BasicCallLog\_General.xlsx

Choose File No file chosen

Description  
Basic Call Log with all trunk calls

Sql Query  

```
SET @currTimeUTC = UTC_TIMESTAMP();
SELECT calls.Id,
cast(TIMESTAMPDIFF(SECOND,'1899-12-30 00:00:00',
CONVERT_TZ(calls.StartTime,'+00:00','SYSTEM')) as decimal(15,4))/86400,
```

OK




























6. After you have customized the information as necessary, click on **OK** button for the new custom template to be created and added to the general templates pool.

Templates			
	Category	Name	Custom
B	Billing	Billing By Agent	No
C	Call Log	Basic Call Log	No
C	Call Log	Basic Call Log - Custom	Yes
C	Call Log	Detailed Call Log	No
C	Call Log	Un Returned Lost Calls	No
C	Call Summary	Calls by Agent	No
C	Call Summary	Calls by Days	No
C	Call Summary	Calls by DID	No
C	Call Summary	Calls by Extension	No

**To edit a new Excel Report Template**

**NOTE:** You can edit the custom templates created by you (i.e. by your user account) only.

7. Click on the **Templates** button on the left panel. The *Templates* list displays.  
Click on the **Edit** button of the selected custom template.




























Templates				
	Category	Name	Custom	
B	Billing	Billing By Agent	No	  
C	Call Log	Basic Call Log	No	  
C	Call Log	Basic Call Log - Custom	Yes	  
C	Call Log	Detailed Call Log	No	  
C	Call Log	Un Returned Lost Calls	No	  
C	Call Summary	Calls by Agent	No	  
C	Call Summary	Calls by Days	No	  
C	Call Summary	Calls by DID	No	  
C	Call Summary	Calls by Extension	No	  

8. The *Edit Template* screen displays.  
You can edit the following template information:
  - Category
  - Excel Report file
  - Description
  - SQL Query, internally used for the template at report generation
9. Click on **OK** button for changes to take effect.

#### To delete a custom Report Template

**NOTE: You can delete the custom templates created by you (i.e. by your user account) only.**

10. Click on the **Templates** button on the left panel. The *Templates* list displays.  
Click on the **Delete** button of the selected custom template.

Templates				
Category	Name	Custom		
B	Billing	Billing By Agent	No	  
C	Call Log	Basic Call Log	No	  
C	Call Log	Basic Call Log - Custom	Yes	  
C	Call Log	Detailed Call Log	No	  
C	Call Log	Un Returned Lost Calls	No	  
C	Call Summary	Calls by Agent	No	  
C	Call Summary	Calls by Days	No	  
C	Call Summary	Calls by DID	No	  
C	Call Summary	Calls by Extension	No	  


11. The confirmation screen displays. Click on **OK** button.

## Browse Reports History


All generated reports display in the History list. You can browse the list, display and purge reports.

### To browse the History List

1. Click on the **History** button on the left panel. The *History* list display.




Call Accounting





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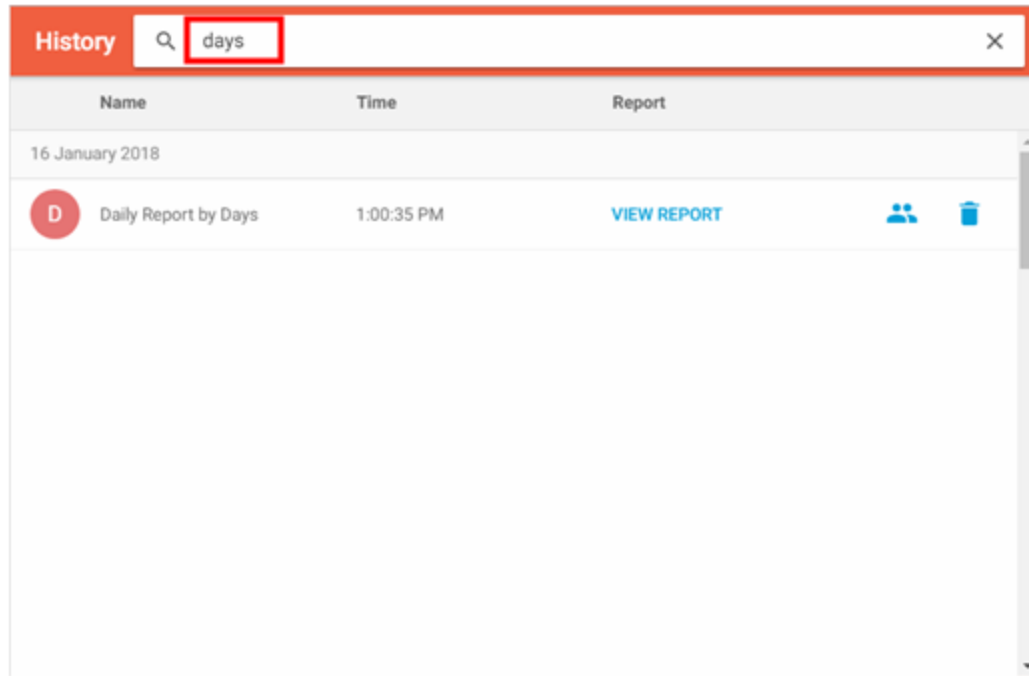
 About

History

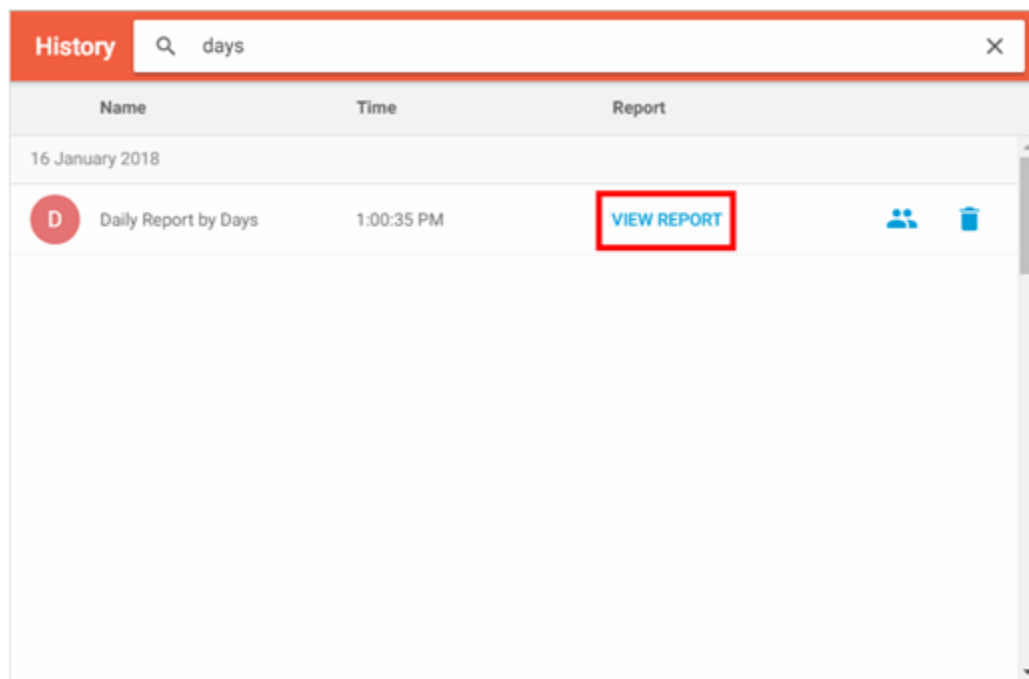
 Search

Name	Time	Report
16 January 2018		
<div>D</div> Daily Report	12:38:04 PM	<a href="#">VIEW REPORT</a> <div></div>
<div>N</div> New Report	12:36:56 PM	<a href="#">VIEW REPORT</a> <div></div>
<div>D</div> Daily Report	12:34:43 PM	<a href="#">VIEW REPORT</a> <div></div>

2. You can quick search the *History* list by alphanumeric strings. Enter the report name text you are looking for, for example *days*. The History report items that matched the text display in the list.

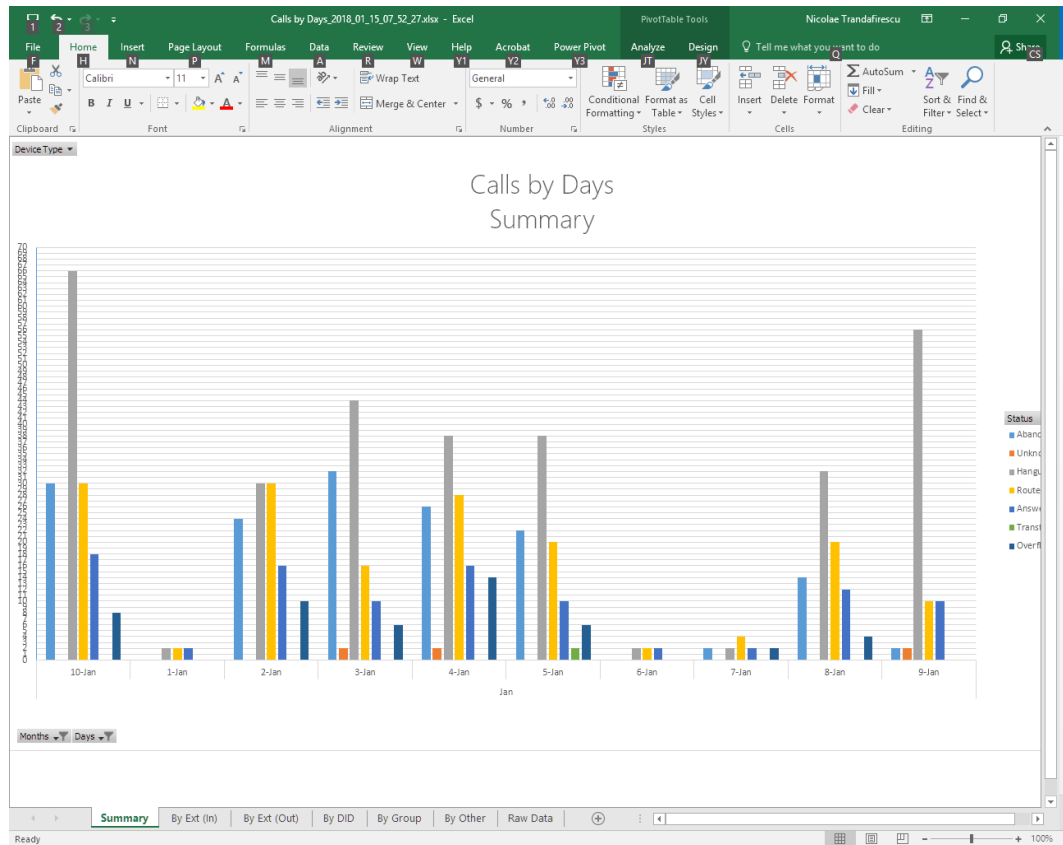


3. Click on the **View Report** button of your choice to view the report.



4. The Excel report is downloaded. Click on the report to open it in Excel.
5. Click on **Enable Editing** button in Excel. The Excel worksheets refresh and present the *Summary* and *Details* information of the report.





6. You can print the report using Excel.

### To purge the History List

1. Click on the **History** button on the left panel. The *History* list display.
2. Select the report you want to remove and click on related **Delete Report** button.

History <input type="text" value="Search"/>				
Name	Time	Report		
16 January 2018				
<span>D</span> Daily Report	12:38:04 PM	<a href="#">VIEW REPORT</a>		
<span>N</span> New Report	12:36:56 PM	<a href="#">VIEW REPORT</a>		
<span>D</span> Daily Report	12:34:43 PM	<a href="#">VIEW REPORT</a>		

3. A conformation message display. Click on **OK** button to confirm deletion.
4. Repeat step#2 and 3 above for every report you want to remove.

# CALL RECORDING

Call Accounting works with *Trunk Call Recording* add-on.

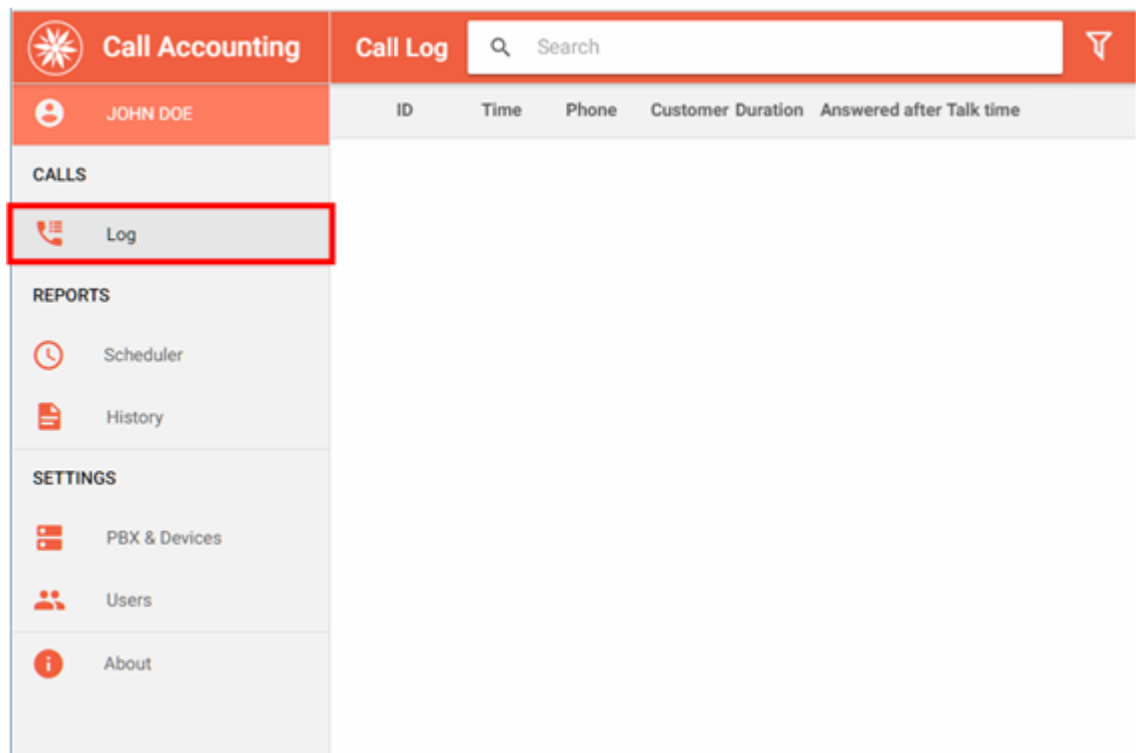
Incoming and outgoing calls are recorded according to *Trunk Call Recording* restrictions, if any. Intercom calls are not recorded.

Please refer to *Installing and configuring the system for the first-time* section in the *Trunk Call Recording User's Guide* for installation and configuration instructions or contact [support@poltys.com](mailto:support@poltys.com).

The call recordings are accessible via Call Log. They are presented and can be accessed by users by call segments.

## To access a call recording

1. Click on the **Log** button in the left panel.



2. The calls are presented chronologically in the list, latest first; the total number of the calls displays as well in the upper-right corner of the list.

Call Log <input type="text" value="Search"/>							
ID	Time	Phone	Customer	Duration	Answered after	Talk time	166 Calls
144	12:21:37 PM	7011234205		01m 59s	00m 00s	00m 00s	+
143	12:17:22 PM	7011234206		01m 59s	00m 00s	00m 00s	+
142	12:13:47 PM	7011234205		01m 59s	00m 00s	00m 00s	+
141	12:07:42 PM	7011234206		01m 59s	00m 00s	00m 00s	+
140	12:05:57 PM	7011234205		01m 59s	00m 00s	00m 00s	+
139	11:59:49 AM	18643324958		01m 04s	00m 12s	00m 32s	+
138	11:58:40 AM	7011234205		01m 27s	00m 21s	01m 06s	+
137	11:58:20 AM	7011234206		01m 42s	00m 36s	01m 06s	+
140	12:05:57 PM	7011234205		01m 59s	00m 00s	00m 00s	+
139	11:59:49 AM	18643324958		01m 04s	00m 12s	00m 32s	+
138	11:58:40 AM	7011234205		01m 27s	00m 21s	01m 06s	+
137	11:58:20 AM	7011234206		01m 42s	00m 36s	01m 06s	+
136	11:57:26 AM	7011234206		00m 17s	00m 00s	00m 00s	+
135	11:53:01 AM	7011234205		01m 59s	00m 00s	00m 00s	+

3. To get details about the call of interest, click on the call item in the list or on the associated **Call Details** button.

Call Log <input type="text" value="Search"/>							
ID	Time	Phone	Customer	Duration	Answered after	Talk time	166 Calls
144	12:21:37 PM	7011234205		01m 59s	00m 00s	00m 00s	+
143	12:17:22 PM	7011234206		01m 59s	00m 00s	00m 00s	+
142	12:13:47 PM	7011234205		01m 59s	00m 00s	00m 00s	+
141	12:07:42 PM	7011234206		01m 59s	00m 00s	00m 00s	+
140	12:05:57 PM	7011234205		01m 59s	00m 00s	00m 00s	+
139	11:59:49 AM	18643324958		01m 04s	00m 12s	00m 32s	+
138	11:58:40 AM	7011234205		01m 27s	00m 21s	01m 06s	+
137	11:58:20 AM	7011234206		01m 42s	00m 36s	01m 06s	+
140	12:05:57 PM	7011234205		01m 59s	00m 00s	00m 00s	+
139	11:59:49 AM	18643324958		01m 04s	00m 12s	00m 32s	+
138	11:58:40 AM	7011234205		01m 27s	00m 21s	01m 06s	+
137	11:58:20 AM	7011234206		01m 42s	00m 36s	01m 06s	+
136	11:57:26 AM	7011234206		00m 17s	00m 00s	00m 00s	+
135	11:53:01 AM	7011234205		01m 59s	00m 00s	00m 00s	+

4. The call item with ID 139, for example, expands and all associated call segments display with details. Also, the audio player shows at the bottom of call segments.

Call Log <input type="text" value="Search"/>							
ID	Time	Phone	Customer	Duration	Answered after	Talk time	166 Calls
144	12:21:37 PM	7011234205		01m 59s	00m 00s	00m 00s	+
143	12:17:22 PM	7011234206		01m 59s	00m 00s	00m 00s	+
142	12:13:47 PM	7011234205		01m 59s	00m 00s	00m 00s	+
141	12:07:42 PM	7011234206		01m 59s	00m 00s	00m 00s	+
140	12:05:57 PM	7011234205		01m 59s	00m 00s	00m 00s	+
139	11:59:49 AM	18643324958		01m 04s	00m 12s	00m 32s	-

Time Offset	Device Number	Device Name	Device Group	Device Type	Duration	Talk time	Status
00m 00s	18649201768			Trunk	00m 00s	00m 00s	Routed
00m 00s	500			Other	00m 00s	00m 00s	Answered
00m 00s	5101			Other	00m 07s	00m 00s	Transfer
00m 07s	316	Alex NTS46		Extension	00m 41s	00m 32s	Transfer
00m 48s	601	Sales		KCD Group	00m 16s	00m 00s	Abandoned

0:00 / 1:04

138	11:58:40 AM	7011234205		01m 27s	00m 21s	01m 06s	+
137	11:58:20 AM	7011234206		01m 42s	00m 36s	01m 06s	+
140	12:05:57 PM	7011234205		01m 59s	00m 00s	00m 00s	+

5. You can play the corresponding call segment records by clicking on the related time offsets in the Call Log.

Call Log <input type="text" value="Search"/>							
ID	Time	Phone	Customer	Duration	Answered after	Talk time	166 Calls
144	12:21:37 PM	7011234205		01m 59s	00m 00s	00m 00s	+
143	12:17:22 PM	7011234206		01m 59s	00m 00s	00m 00s	+
142	12:13:47 PM	7011234205		01m 59s	00m 00s	00m 00s	+
141	12:07:42 PM	7011234206		01m 59s	00m 00s	00m 00s	+
140	12:05:57 PM	7011234205		01m 59s	00m 00s	00m 00s	+
139	11:59:49 AM	18643324958		01m 04s	00m 12s	00m 32s	-

Time Offset	Device Number	Device Name	Device Group	Device Type	Duration	Talk time	Status
00m 00s	18649201768			Trunk	00m 00s	00m 00s	Routed
00m 00s	500			Other	00m 00s	00m 00s	Answered
00m 00s	5101			Other	00m 07s	00m 00s	Transfer
00m 07s	316	Alex NTS46		Extension	00m 41s	00m 32s	Transfer
00m 48s	601	Sales		KCD Group	00m 16s	00m 00s	Abandoned

0:00 / 1:04

138	11:58:40 AM	7011234205		01m 27s	00m 21s	01m 06s	+
137	11:58:20 AM	7011234206		01m 42s	00m 36s	01m 06s	+
140	12:05:57 PM	7011234205		01m 59s	00m 00s	00m 00s	+

6. Also, you can download the entire call record by clicking on the related button of the audio player.

Call Log

Search

ID	Time	Phone	Customer	Duration	Answered after	Talk time	166 Calls
✓ 144	12:21:37 PM	7011234205		01m 59s	00m 00s	00m 00s	+
✓ 143	12:17:22 PM	7011234206		01m 59s	00m 00s	00m 00s	+
✓ 142	12:13:47 PM	7011234205		01m 59s	00m 00s	00m 00s	+
✓ 141	12:07:42 PM	7011234206		01m 59s	00m 00s	00m 00s	+
✓ 140	12:05:57 PM	7011234205		01m 59s	00m 00s	00m 00s	+
✓ 139	11:59:49 AM	18643324958		01m 04s	00m 12s	00m 32s	-
Time Offset	Device Number	Device Name	Device Group	Device Type	Duration	Talk time	Status
00m 00s	18649201768			Trunk	00m 00s	00m 00s	Routed
00m 00s	500			Other	00m 00s	00m 00s	Answered
00m 00s	5101			Other	00m 07s	00m 00s	Transfer
00m 07s	316	Alex NT546		Extension	00m 41s	00m 32s	Transfer
00m 48s	601	Sales		ICD Group	00m 16s	00m 00s	Abandoned
<div><div>▶ 0:00 / 1:04</div><div></div><div>🔊</div><div>⏮</div><div>⏭</div><div>⏹</div></div>							
✓ 138	11:58:40 AM	7011234205		01m 27s	00m 21s	01m 06s	+
✓ 137	11:58:20 AM	7011234206		01m 42s	00m 36s	01m 06s	+
✓ 140	12:05:57 PM	7011234205		01m 59s	00m 00s	00m 00s	+