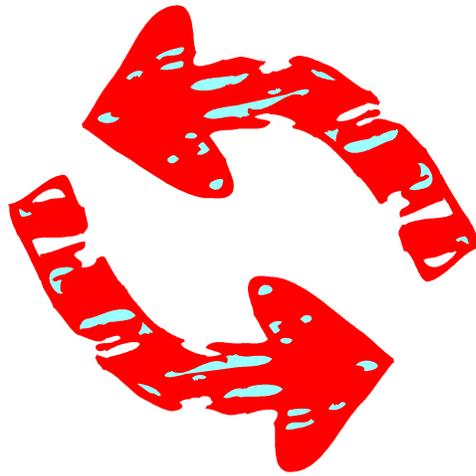




Call Router



Operations Manual

Version 3.0
12/27/1999



Computer Telephony Solutions, Inc.
9831 South 51st Street, Suite C-119
Phoenix, AZ 85044
(480) 496-9040

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Requirements

PC Requirements

Call Router requires the *OAISYS Net Server* from **Computer Telephony Solutions, Inc.** in order to run. *OAISYS Net Server* must be installed on a dedicated PC as specified in the *OAISYS Net Server Operations Manual*. *Call Router* can run on the same PC.

Telephone System Requirements

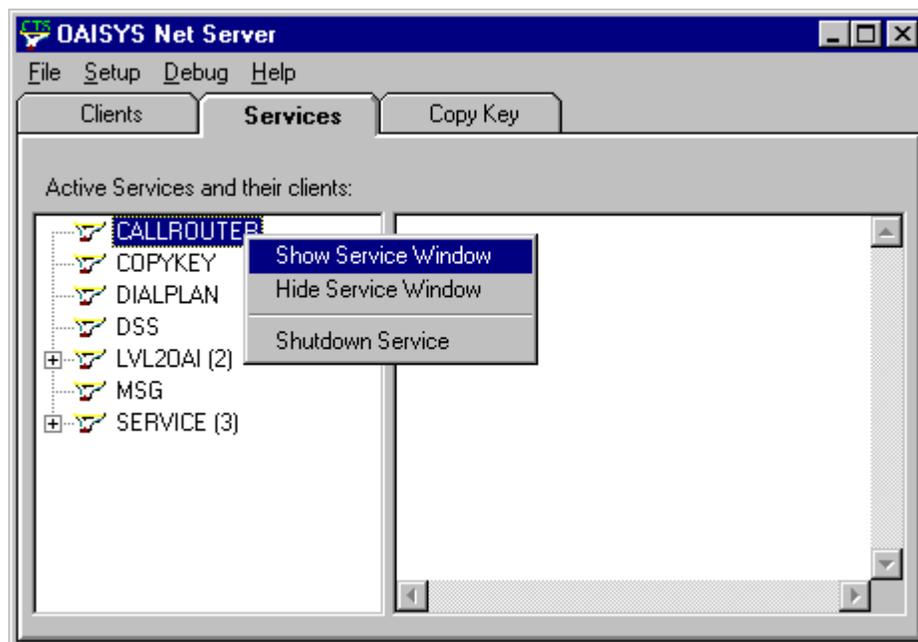
Call Router works with an Inter-Tel *Axxess* Telephone System, version 4.1 or higher. It requires a Level 2 OAI connection with both the premium features **System OAI Events** and **System OAI Third Party Call Control** enabled.

The routing extensions used by the *Call Router* would typically be “phantom” extensions (but could be real phones). These extensions should be programmed to take all incoming calls directly. As a precaution, they should have **Forward No-Answer** programmed to an attendant’s set, probably the same extension as will be designated as the **Default Destination** in the **Preferences** section of *Call Router*.

If a real phone is connected to the routing extension, it is recommended that the ringer of the extension be turned off and that the telephone set be placed in some out-of-the-way location.

Power-Up

Call Router will automatically launch once *OAISYS Net Server* successfully connects to the phone system. The *Call Router* screen will appear briefly on the desktop while initializing. Once it establishes the link to *OAISYS Net Server*, *Call Router* will hide itself. Use the Services tab in *OAISYS Net Server* to open the *Call Router* programming screens, as shown below.



What's new with Call Router 3.0?

CTI Call Handler

The *Call Router* is essentially an OASYS (system-level) version of the existing *CTI Call Handler* product except for the differences noted below.

Note: *The first release of Call Router is called version 3.0 to be consistent with the new versions of the other OASYS system applications.*

OAI ports

Call Router uses the System Level OAI port connected to the OASYS Net Server and shared by all OASYS applications. *CTI Call Handler* uses a desktop OAI port and thus needs to be connected directly to a keyset or agent set.

Windows NT compatible

Call Router and *Call Router Administrator* can run on the Win'95, Win'98, or Windows NT platforms but not on Windows 3.1 or below.

Added Fields

Two additional fields have been added to the Call Routing Database Design. The two new fields are Customer ID and URL. These optional fields can be used to attach additional information to calls so the information can be displayed and used by the *OASYS Net Phone*.

Monitor up to 5 Extensions

Call Router can now monitor and route calls on up to five extensions simultaneously. The *CTI Call Handler* can only monitor one extension; with a 2nd Port Call Handler two ports can be used. Each monitored extension can use a separate database if needed.

Installation

Call Router consists of two programs, *Call Router* and *Call Router Administrator*. They should be installed in the following order: (1) *Call Router*, and (2) *Call Router Administrator*.

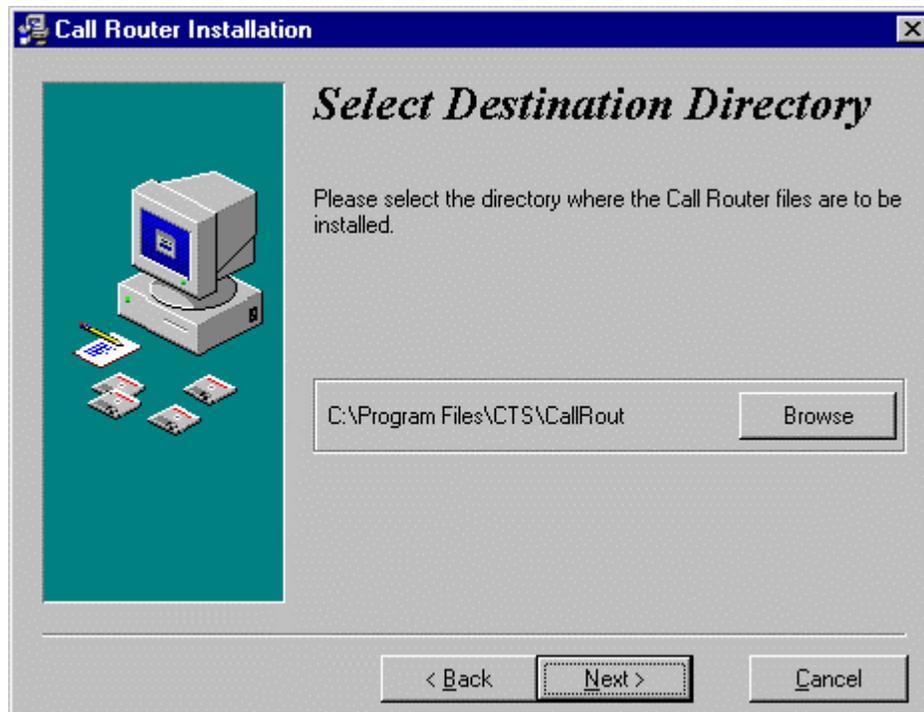
Installing Call Router

Special Note: If you are upgrading from a version of CTI Call Handler, you will probably want to save your existing call-routing database. To do so, use a file management program to rename your existing database, CLID.MDB, CLID1_3.MDB or CLID_131.MDB, to some other name, such as SAVCLID.MDB, before you begin this installation procedure. Once the installation of Call Router is complete, use the Incorporate command in Call Router Administrator to import your old database (see Incorporate Records, page 23). It is also a good idea to delete all the existing files (except for your saved database) before the upgrade installation just to make sure that all the files you are using are current.

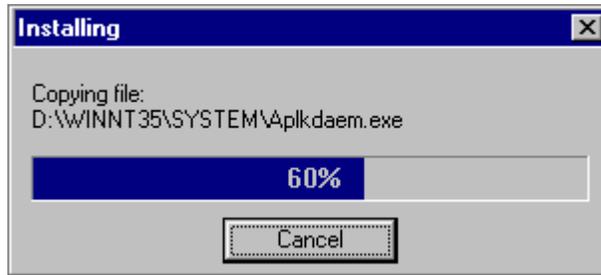
Insert the *OAISYS Net Suite* CD into the CD drive of your computer. From the Main Menu select *OAISYS Applications*. Then select *Call Router* from the menu of choices.

Select *Install Call Router*, and the Install Program will automatically prompt you through the installation process.

The Installation Program will suggest a directory for *Call Router*.



It is suggested that you accept the default directory, but a different directory can be specified. If you change the directory name, make a note of the directory that you use because you will want to make the same substitution for *Call Administrator*. Select **OK** when you are ready. The install program will display the files as they are installed.



After the Installation is completed you will see that a new Program Group has been created under the *OAISYS* Group.

Call Router is now ready to run. Click the icon to open it.

Installing Call Router Administrator

Once the *Call-Routing* portion of *Call Router* has been successfully installed, you can install *Call Router Administrator*. Insert the *OAISYS Net Suite CD* and select *OAISYS Applications* from the main menu. Then select *Call Router*. Next select *Install Call Router Administrator*. Follow the same procedures as outlined in *Installing Call Router* above.

When the prompt for a directory name comes up, enter the same directory that you specified for *Call Router*. If you accepted the default directory then, do the same now by simply selecting **OK**.

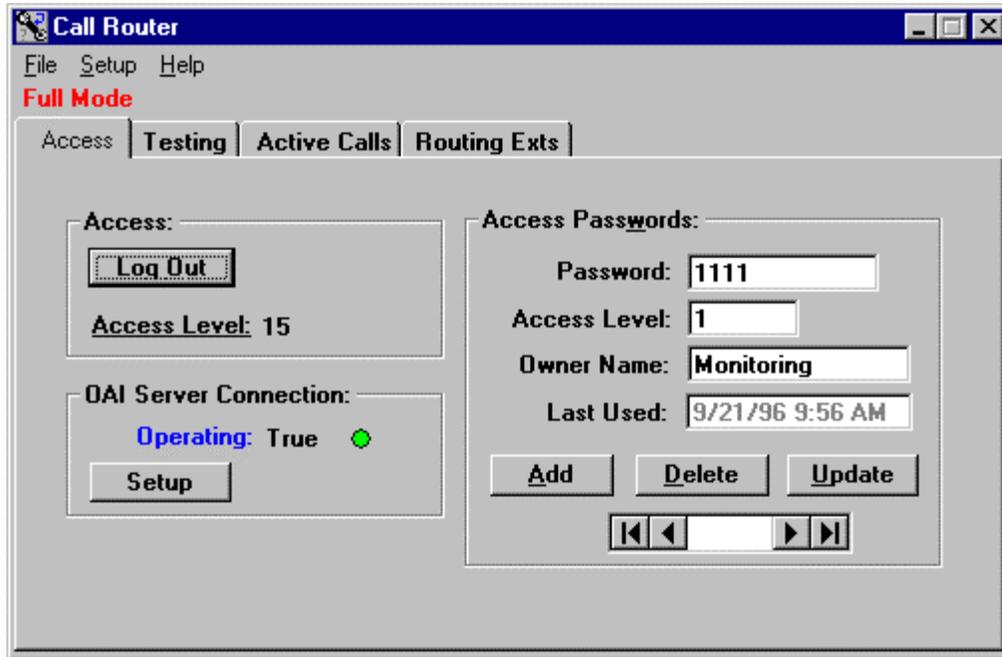
Special Note: If the PC dedicated to Call Router is on a network which allows one PC to access the hard drive of another PC, it is possible to install Call Router Administrator on a different PC altogether. This would allow an Attendant or a Data-Processing Clerk to update the database from their local PC without having to go to the OASYS PC to make additions or changes. The installation procedure would be just the same as that described for the OASYS PC, only it would be performed at the other location. The first time that Call Router Administrator is run, it will have to be informed of the Drive and Directory location of the database, which will be in the Drive and Directory of the Call Router.

Once the installation process is complete, a second and third icon will have been installed in the new *OAISYS* Group.

The *Call Router Administrator* and *Database Repair* programs are now ready to run. Click on either icon to run the program.

Call Router

The Main Window of *Call Router* looks like this:



Menu Options

File

Exit

Use this menu selection to Exit *Call Router*.

Setup

Preferences



This section is used to set up a designated Port Group in Voice Assistant for *Call Router* to use. If no group is specified it will use ports from the "*" or Universal group.

Help

On-line help is provided by selecting **Help** from the Main Menu.

Tab Options

Access

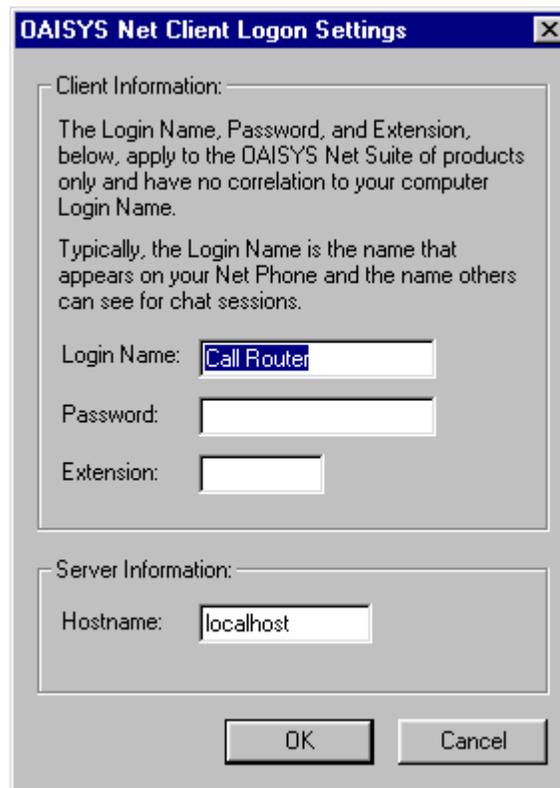
Log In / Log Out

This button is used to log in and log out of *Call Router*. After successfully logging in, your access level will display under the Log Out button.

OAI Server Connection

This button is used to view and edit the *OAISYS Net Server* configuration information.

If you have a valid connection to the *OAISYS Net Server*, the light will display green to indicate it is operating.



The screenshot shows a dialog box titled "OAI SYS Net Client Logon Settings". It contains two sections: "Client Information" and "Server Information".

Client Information:

The Login Name, Password, and Extension, below, apply to the OAI SYS Net Suite of products only and have no correlation to your computer Login Name.

Typically, the Login Name is the name that appears on your Net Phone and the name others can see for chat sessions.

Login Name:

Password:

Extension:

Server Information:

Hostname:

At the bottom of the dialog box are two buttons: "OK" and "Cancel".

Client Information

Login Name - This is the application name.

Password - This field can be left blank, or you can enter a unique password.

Extension - This field can be left blank, or you can enter a unique extension number.

Server Information

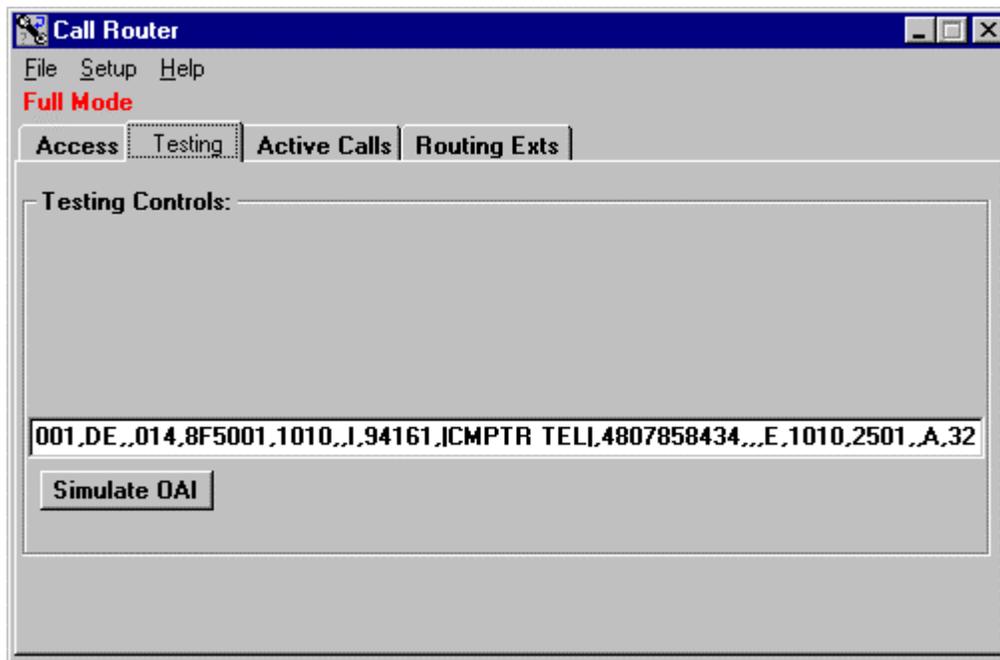
Hostname - This is the name of the *OAISYS Net Server* PC. Often times, the default value of "localhost" will be fine. In some situations you may need to enter the NetBIOS name of the *OAISYS Net Server*, or the TCP/IP address of the *OAISYS Net Server*.

Access Passwords

This section is used to Add, Delete, and Update user access information and passwords.

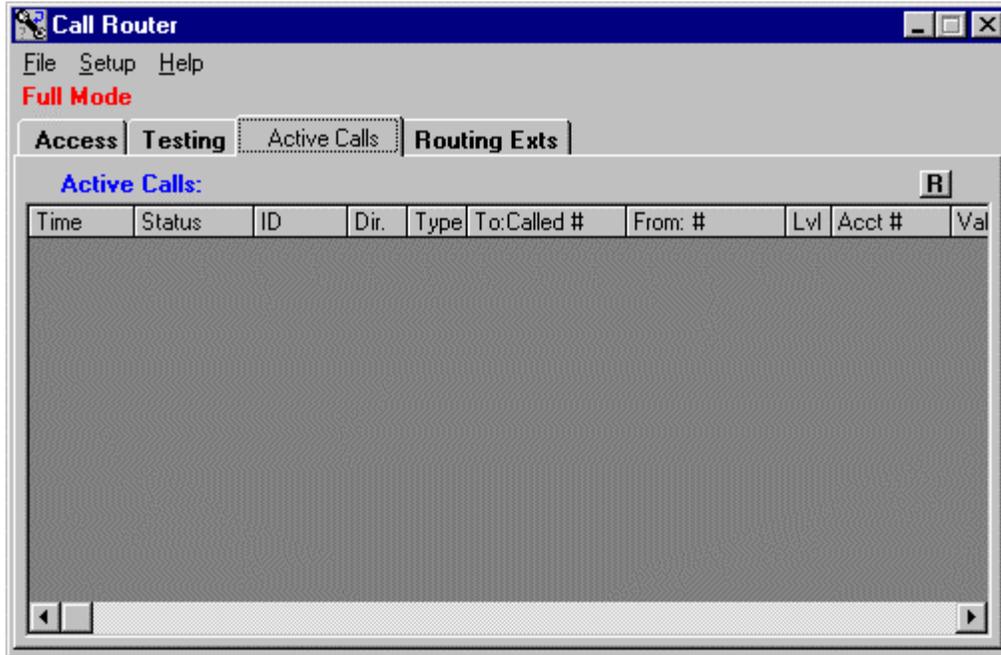
Testing

This section is used primarily for trouble shooting.



Active Calls

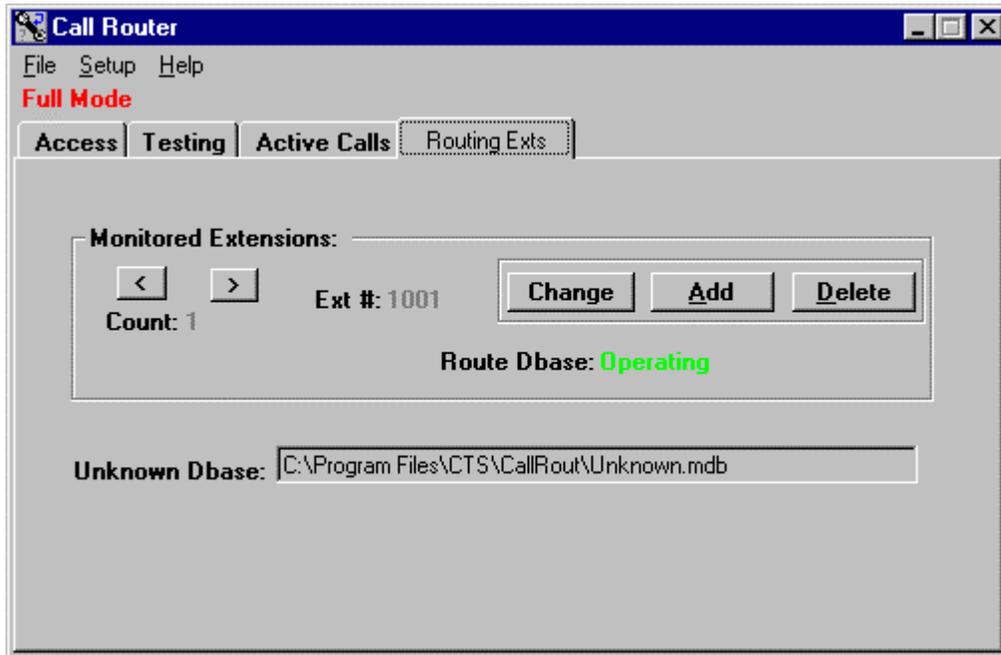
This window displays calls that are currently active in *Call Router*.



Routing Extensions

This tab is used to Add, Delete, and Change the extensions that *Call Router* will monitor.

If you have a successful connection to your routing database, the Route Dbase will show a status of Operating.



Monitored Extensions

Use the arrows to navigate to the monitored extension you wish to change or click on Add to add a new monitored extension. Find the extension you want to delete, and click on the Delete button if you want to delete a monitored extension. Up to 5 extensions can be monitored simultaneously.

When adding or changing a monitored extension, the Change Preferences screen appears.

Call Routing

Routing Extension

The extension that you are configuring will be displayed here.

Send New Calls to Voice Assistant

These options only apply if you have also installed *Voice Assistant*. If *Voice Assistant* is not installed the settings in this area will not have any effect on the operation of *Call Router*; however, for the most efficient operation, leave **Never** selected.

If you are using *Voice Assistant* select the radio button which defines how you want to process calls when they first arrive at the *Call Router*:

Always - Always send a new call to *Voice Assistant* for processing.

Never - Under no circumstances send new calls to *Voice Assistant* for processing (this does not preclude later processing of the same call by *Voice Assistant* based on routing instructions in the *Call Routing Database*).

CallerID/ANI - Send a new call to *Voice Assistant* if there is no CallerID/ANI information available with the call.

DID/DNIS - Send a new call to *Voice Assistant* if there is no DID/DNIS information available with the call.

Account Code - Send a new call to *Voice Assistant* if there is no Account Code information available with the call.

Once you have defined how *Call Router* should handle a new call, enter the *Voice Action Script* with *Parameters* as instructions to *Voice Assistant* for processing. This, of course, is not necessary if you

have chosen to **Never** send calls to *Voice Assistant*. Press the **Edit** button for **Run Voice Assistant Script** to bring up the *Edit Destination* dialogue box:

The **Voice Assistant** radio button will be the only one enabled since this destination information has to be a *Voice Action Script*. Enter the Script number and the necessary parameters and a description of the script (optional) press OK.

See the *Voice Assistant Operations Manual* for more information.

Default Phone Numbers

Very Important. This field should be programmed to the extension number where calls should be routed when no other destination is known. That is, when all the search paths that the user has programmed have been exhausted and still no destination has been defined, *Call Router* will send the call to this destination. This *Default Phone Number* must be an intercom extension on the phone system; make sure that it is a valid one. To enter the extension number, press the **Edit** button for *Default Destination*.

Enter the intercom extension number and Press OK.

Related information: see Special "Unknown Caller" Record, page 29.

OAI Route Command

This selection allows a choice between using the **Route as a Transfer** OAI command or using the **Route as a New Call** OAI command when routing calls. It is best to use the **Route as a New Call** option because if the call is eventually forwarded to Voice Mail it will then go to the correct voice mailbox.

Off-Premise Call Routing

This field should be programmed to the trunk access code that should be used whenever routing a call to an outside number and no other trunk access code has been specified.

Route FWDed IC Calls

Call Router is able to route intercom calls using the **Forwarding Extension** information. That is, when a call is forwarded to the *Call Router*, the extension of the first extension that forwarded the call is provided as the **Forwarding Extension** for that call. So the *Call Router* has additional routing and search options to use that **Forwarding Extension** information in special application scenarios. This need is most prevalent in networking applications, but can also be useful in other applications.

The **Called Name** field in the database is used for any searches involving the **Forwarding Extension**. If a forward chain occurs (one phone forwarded to another that is forwarded to another), then the **Forwarding Extension** will be that of the first extension that forwarded the call.

Regardless of the settings in this box, intercom calls that are not forwarded will always be ignored.

The choices for this option are:

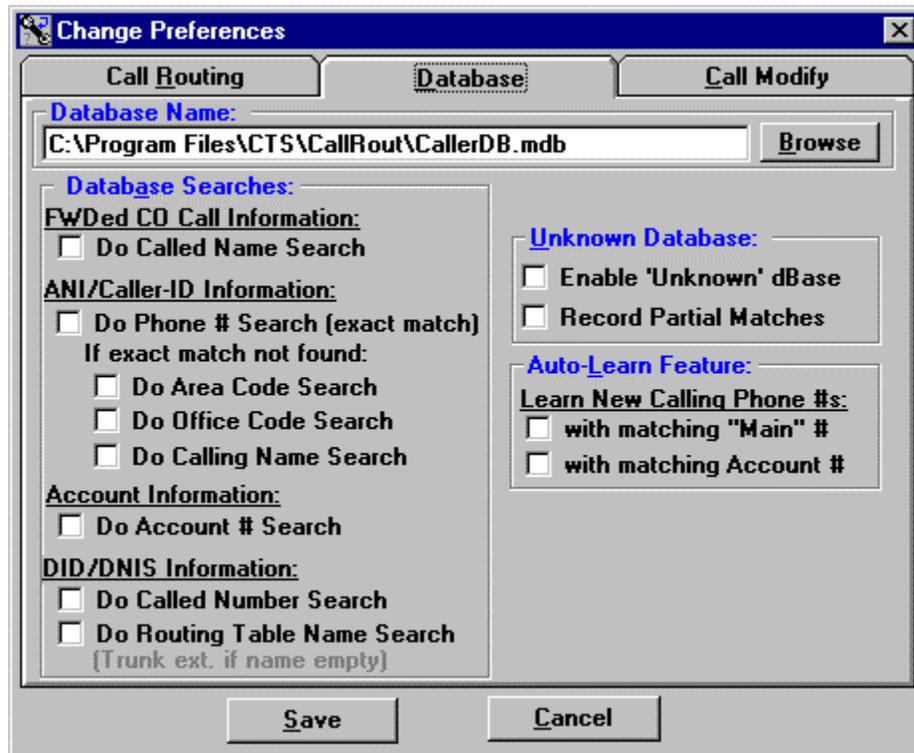
Never - This is the Default option and is used to disable routing of Forwarded Intercom calls.

Always - This option means that Forwarded Intercom calls will always be routed. If no match is found in the database, the default extension will be used.

Only if Match Found in dbase "Called Name" - This option will ignore Forwarded Intercom calls if they don't have a matching extension number in the **Called Name** field in the database. This can be

useful in installations that use *Call Router* for other applications concurrently with a networking application.

Database



Database Name

This displays the database in use. You can use the Browse button to locate a specific database.

Database Searches

This section defines the types of database searches *Call Router* can perform and the order in which they are done. Select the searches you need for your application. They will be executed in the order they appear on the screen, reading from top to bottom. As soon as a match is found in the *Call Routing Database* for any enabled option, the search is considered completed and no further searches will be done.

Related information: *see Special "Unknown Caller" Record, page 29.*

FWDed CO Call Information:

Do Called Name Search - If this option is enabled, the **Forwarding Extension** information on Forwarded CO calls will be used to search for a match of the **Called Name** field in the database. When enabled, this search occurs before any other searches to provide for networking applications. Note that in some applications, the **Called Name** field in the database will be used for two different searches: **Forwarding Extension** and **DID/DNIS Information**. In those applications care should be taken to choose non-conflicting user names when programming the *Axxess* phone system.

ANI/CallerID Information:

Do Phone # Search (exact match) - Enable this option to perform a database search of the **Phone Number** field based on an exact match of the CallerID or, if you are also using *Voice Assistant*, of the Phone number or Main number entered at a Voice Script prompt.

for more information about Voice Assistant and this feature, see the Voice Assistant Operations Manual.

Do Area Code Search - When this option is enabled, if an exact match of the CallerID number is not found, then another search will be done to see if the first three digits (the Area Code) of the

CallerID number match an entry in the database.

This option should be enabled, and Area Code entries made into the database, if you want to route calls based on Area Code alone. This option should be disabled if you do not plan to make any three digit entries into the database because each extra search adds time to the call routing process.

Do Office Code Search - Like the Area Code search, when this option is enabled, if an exact match of the ten digit CallerID number is not found, then another search will be done to see if the first six digits (Area Code + Office Code) of the CallerID match an entry in the database.

Again, like the Area Code search, if you do not plan to make any six digit entries into the database this option should be disabled to speed the search process.

Do Calling Name Search - When this option is enabled, if none of the number searches listed above find a match, *Call Router* will search the **Name** field for a match.

This option can be useful if the Telephone Company does not send the main listed number of a calling party but instead sends the actual number of the line selected by the PBX of the calling party. For a customer that has many lines, this would mean making a separate entry in the database for each one of that customer's lines in order for *Call Router* to work properly. Instead, you can enable the **Name Search** and route the call based on the company name.

In order for a **Name Search** to create a match, it must find an exact match, so the name of the calling party must be entered exactly as the Telephone Company is going to send it. The name is not, however, case sensitive.

Account Information:

Do Account # Search - Although new, incoming calls do not normally have Account Numbers attached to them, Account Numbers can be attached by the user at any telephone extension or by *Voice Assistant* using the appropriate *Voice Action Scripts*. Therefore, this search option needs to be enabled if you want to perform a database search of the **Account No.** field based on the Account Number added to an incoming phone call.

DID/DNIS Information:

Do Called Number Search - Enable this option to perform a database search of the **Phone Number** field based on the DID/DNIS number information received with the incoming call.

Do Routing Table Name Search - When this option is checked, the Call Router searches the "**Called Name**" field in its database. If you are using Call Routing Tables in the AXXESS this option can be used to search for names that are programmed into the AXXESS's Call Routing Tables. If you are not using Call Routing Tables, then this option can be used to do searches on trunk extension. In this case, you would have to program trunk extension numbers into the "**Called Name**" field in the Call Router database. This new feature allows you to route calls that come in on a specific trunk.

Unknown Database

Enable Unknown Database - This option is used to enable the use of the **Unknown Database**. When calls arrive with phone numbers that are not found in the primary database, those numbers will be saved in the **Unknown Database**.

Record Partial Matches - When the **Enable Unknown Database** option is selected, then choosing this option will record telephone numbers in the **Unknown Database** even if a partial match is made on the Area Code or on the Area Code and Office Code. For example, assume that a call with the number "5045551234" arrives and an exact match is not found, but a match is made on "504," the Area Code. With this feature enabled, "5045551234" is entered into the **Unknown Database** even though a match was made on the Area Code, because it was only a partial match.

Auto-Learn Feature

This feature will only work in conjunction with *Voice Assistant*; enabling any of these options will have no affect on the program if *Voice Assistant* is not installed.

This feature enables *Call Router* to automatically learn and add new call records when the incoming CallerID / ANI can not be identified in the main *Call-Routing Database*. This is done by using *Voice Assistant* to prompt for either the Main Listed number of the caller or for an Account Code, which can be a customer or PIN number which uses the **Account No** field for the database search. By using this feature a CallerID / ANI number which is not recognized by the *Call-Routing Database* the first time will be recognized on all subsequent calls.

with matching “Main” # - When this feature is enabled a new record will be created if all of the following circumstances are true:

- 1) **Do Phone # Search** is enabled in the *Preferences / Database* section, and
- 2) the incoming call provides CallerID / ANI information, and
- 3) the CallerID / ANI information does not create a match in the *Call-Routing Database* and the call is sent to *Voice Assistant* for more information, and
- 4) the number entered by the caller at the voice prompt in *Voice Assistant* matches with the **Phone Number** field of an existing record in the *Call-Routing Database*.

note that the ‘M’ token must be selected in the Voice Action Script being used in conjunction with this feature - see the Operations Manual for Voice Assistant for more information

with matching Account # - When this feature is enabled a new record will be created if all of the following circumstances are true:

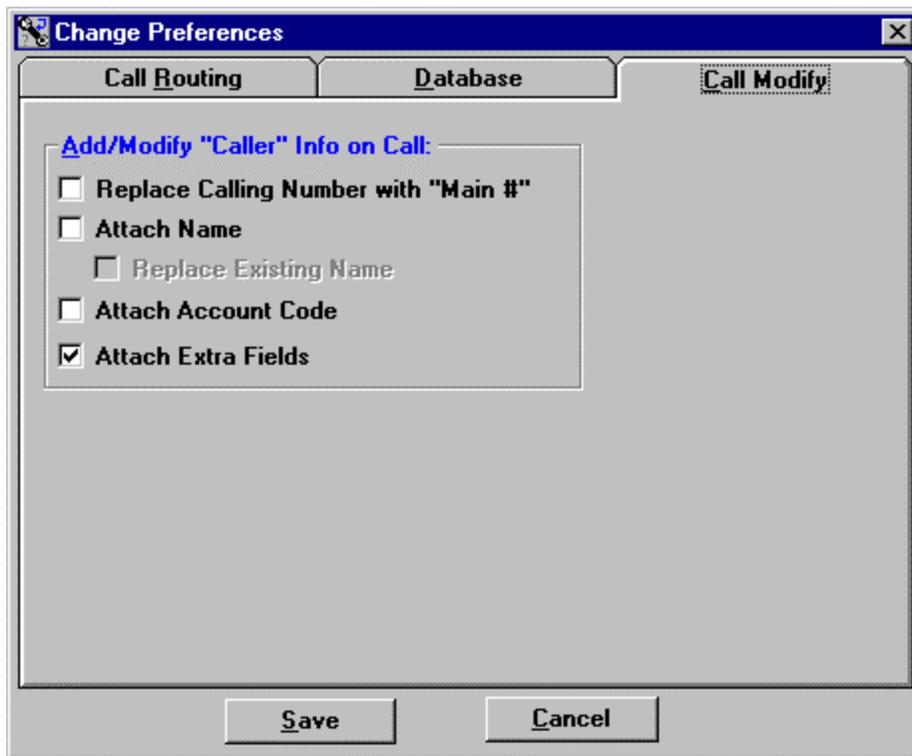
- 1) **Do Account # Search** is enabled in the *Preferences / Database* section, and
- 2) the incoming call provides CallerID / ANI information, and
- 3) the CallerID / ANI information does not create a match in the *Call-Routing Database* and the call is sent to *Voice Assistant* for more information, and
- 4) the number entered by the caller at the voice prompt in *Voice Assistant Option* matches with the **Account No** field of an existing record in the *Call-Routing Database*.

note that the ‘A’ token must be selected in the Voice Action Script being used in conjunction with this feature - see the Operations Manual for Voice Assistant Option for more information

If a new record is created, the fields are set according to the following rules:

- 1) The **Phone Number** field of the new record is set to the CallerID / ANI information provided with the incoming call
- 2) The **Modify To #** field of the new record is copied from the same field of the matched record unless:
 - a) the **Modify To #** field of the matched record is blank, and
 - b) the match is made using the **with matching “Main” #** option, and
 - c) the number entered by the caller at the prompt is 10 digits, then the number entered by the caller at the prompt is entered into the **Modify To #** field of the new record
- 3) All the other fields (**Calling Name, Account No, Destination, Schedule**) of the new record are copied from the same fields of the record which created the match.
- 4) The **Temporary** flag of the new record is set to *True*.

Call Modify

**Add / Modify “Caller” Info on Call**

Replace Calling Number with “Main #” - When this option is enabled, the CallerID / ANI information will be modified to the number of the **Modify To #** field of a matched record if there is a value entered in that field.

This feature is useful because CallerID-based call routing and any subsequent ‘screen-pop’ is challenging for the simple reason that a ‘calling customer’ can call from many different telephone numbers even within their own company (a ‘main’ number and many ‘secondary’ phone numbers). Frequently, the database to be ‘screen-popped’ only contains a single “Main” customer telephone number or customer account number. Thus an effective CallerID-based solution must be able to map many telephone numbers to a single “Main” phone or customer account number. By collecting all the secondary numbers of a customer, through the use of the **Unknown Database** and/or the **Auto-Learn** feature, and mapping them to that customer’s “Main” telephone number, the efficiency of your call routing strategies can be greatly improved.

If *Voice Assistant* is installed an additional modification can take place under certain circumstances when this **Replace** option is enabled. If the caller is prompted by a *Voice Action Script* for their “Main” phone number and the number they enter does not create a match with any number in the **Phone Number** field of the database, then, if the number they entered was 10 digits, the CallerID will be modified to the number that they entered even though a match was not found.

Attach Name - When this option is enabled, names can be added to calls that arrive without a “Name” field provided. If a call arrives from the telephone company without a “Name” field and a match for the number is found in the database, *Call Router* will attach the name entered in the **Caller Name** field of the database.

This feature can be useful in providing the name from the database instead of paying extra monthly charges to have the name provided by the telephone company.
see Special “Unknown Caller” Record, *page 29*.

Replace Existing Name - When this option is enabled, *Call Router* will replace the CallerID name provided by the Telephone Company with the name you have entered in the database when it routes the call.

This feature can be useful if there is a name which is more meaningful to you than the name provided by the Telephone Company. For example, if *Bob Lucero* means more to you than *ABC Company*, you would enter *Bob Lucero* in the name portion of the database entry form and enable this option.

Attach Account Code - When this option is enabled, an account code of your choosing can be added to any call. When a call is identified in the database, *Call Router* will attach the account number that has been entered in the **Account No.** field of the database for that number.

This automated Account Code feature can be useful if you use the *Axxess* telephone system's account codes for doing your call billing. The account code that is supplied by the database appears as if it were entered by the user under the *Forced* or *Optional Account Code* feature of the *Axxess* phone system. This means that the account code provided by the *Call-Routing Database* is sent out with the SMDR information and can be used by an attached Accounting System.

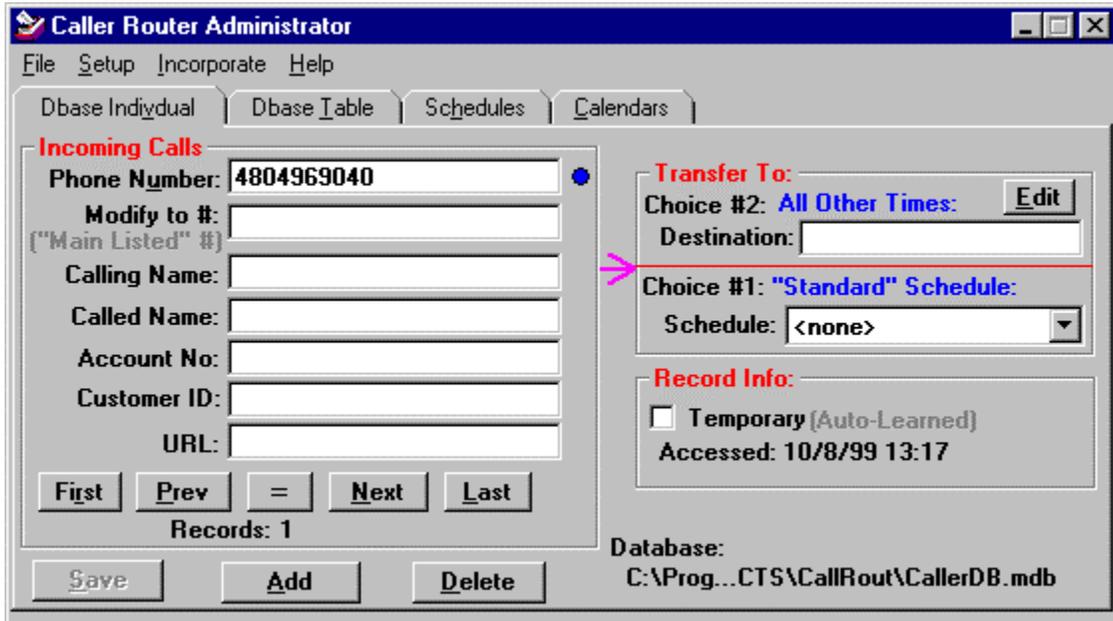
*See the discussion about the **Account No.** field under the instructions for the **DBase Individual** form, page 26.*

Attach Extra Fields

When this option is enabled, information from the extra fields in the database can be attached to the call and used by *Net Phone* when the call arrives at desktop running that program.
for more information on the extra database fields, see page 27

Call Router Administrator

When you first open *Call Router Administrator*, the Window looks like this:



Menu Choices

File

Open Database

If at any time you need to change the path to the primary *Call Routing Database*, you can use the **Open Database** menu option to tell *Call Administrator* where the new database is located.

Import a File

This menu choice allows the manual importing of data from a comma-delimited ASCII text file. Most other database programs can export to this type of file format, so this is quite useful for “copying” data from other databases. When selected, the menu option gives you this screen:

Setup

File to Import - Enter the text file to be imported. The **Browse** button can be used to easily find the desired file.

On Duplicate Records - select one of the following options for dealing with a situation in which a duplicate **Calling Number** is encountered during the course of the import (a Null in the **Calling Number** field can never create a duplicate and any record with a Null in this field will automatically be added, whether or not there are duplications in any of the other fields):

Stop on Duplicate - This will cause the program to stop and tell you every time a duplicate record is encountered.

Ignore Import - This will cause the program to automatically keep the existing record and ignore the record being imported.

Modify dBase - This will cause the program to automatically overwrite the existing record with the imported one, effectively deleting the old one.

File Options - There are two file options available:

Delete Import File - This option will automatically delete the import file once the import is complete.

Create Result File - If selected, a results file will be stored in the same directory and have the same name as the import file except the filename will have a RES suffix (ex: IMPORT.RES).

Field Definitions

From one to nine fields can be contained in each record, but only the first field is required. Each field must be separated from the following field by a comma and if a field, such as a name, contains a comma, that field should be enclosed in double quotes.

Except for the first field, any or all the other fields can be left off of a record. However, once a field is not included, no subsequent fields can be included except by default. If you want to leave, say, field number 3, the **Account Number**, blank but include field number 4, the **Destination**, you must create a blank field for the **Account Number**. A blank field is created by having no entry in the field (two commas side by side), like the following line:

505 438-8032,Golden Gate,, "V299,110"<CR><LF> (4 fields w/ no **Account No** for this

record)
(see the examples below)

All records must be on one line and terminated with Carriage Return (<CR>) and Line Feed <LF> characters. The nine fields, in their proper order, are as follows:

Field Position	Field Name	Required	Default Options
1	Calling Number	Yes	None
2	Calling Name	No	None
3	Account Number	No	@@DEF - use Default Account #
4	Destination	No	@@DEF - use Default Destination
5	Modify-To	No	@@DEF - use Default Modify-To #
6	Called Number	No	@@DEF - use Default Called Number
7	Called Name	No	@@DEF - use Default Called Name
8	Schedule Name	No	@@DEF - use Default Schedule
9	Temporary	No	Zero is assumed if not provided.

Calling Number - This field should contain either the CallerID / ANI number or the DID / DNIS number of the record you want to add. This field is required, although it can be a Null value (see the examples below). If it is not a Null value, it must be unique. This field can include hyphens, spaces, or parentheses (they will be automatically stripped out by the import utility).

Calling Name - This field should contain the name of the calling party. This name can be used in database searches for routing or attached to a record that has been matched based on another criteria.

Account Number - This field should contain the account or customer code associated with the record and can be used in database searches or attached to a record that has been matched based on another criteria.

Destination - This field should contain the **Choice #2 Destination** routing for the record, to be used if no Schedule is specified or if the specified Schedule does not create a match. If this destination is something other than a simple extension number, such as an outside line, voice mailbox, or *Voice Assistant* script, the proper programming convention for these destinations must be duplicated. If there is any question as to what that convention is, set up the desired destination in a sample record using the **Edit Destination** dialog box, and then copy the resulting line of programming into your ASCII file.

Modify-To - This field is, generally, used for the "main listed number" of the calling party and can be substituted for the actual CallerID / ANI of the incoming call.

Called Number - not currently used.

Schedule - This field can be used to automatically associate a routing Schedule with the record. If a name is entered here, it must be exactly the same as an existing Schedule. Because of the possibility for error in this field, it is recommended that you use the Default convention for adding a Schedule to a record.

Temporary - This flag can be either a Zero, marking the record as permanent, or One, marking the record as temporary or auto-learned, and is defaulted to zero automatically.

(for further field definitions, see the section titled Tab Choices / Dbase Individual, page 25)

Using Defaults

Default values can be automatically inserted for all but the **Calling Number**, **Calling Name**, and **Temporary** flag, in one of the following two ways:

No entry for the field - If no entry, including a blank entry, is made for the field and a default entry is entered in the setup box for that field, the default entry will be entered as the field entry for that record.

A default token calls for a default entry - If the default token (@@DEF) is entered for the field and a default entry is entered in the setup box for that field, the default entry will be entered as the field entry for that record.

Examples

The following ASCII file is explained, line by line, underneath its listing (the *Carriage Return* and *Line Feed* indications would not normally be seen and are indicated here as a reminder that they must be included):

```
(505)438-8032<CR><LF>
510 455-2310,"Travis, William"<CR><LF>
5128981209,Pretty Rugs,,@DEF<CR><LF>
202,,,@DEF,,,,,<CR><LF>
,New Foods,439866,"V299,254",2129460900,,,@DEF<CR><LF>
```

(505)438-8032

(1 field) Any default entries entered on the Setup screen will be included as part of this record.

510 455-2310,"Travis, William"

(2 fields) The **Calling Name** field must be entered in double quotes because it contains a comma as part of the name. Any default entries entered on the Setup screen will be included as part of this record.

5128981209,Pretty Rugs,,@DEF

(4 fields). Field number 3, the **Account Number**, is blank and will be blank on the final record regardless of whether there is any default entry for the **Account Number** field. Field number 4, the **Destination**, is calling for the default value if there is one. Any default entries entered for fields 5 through 8 on the Setup screen will be included as part of this record.

202,,,@DEF,,,,,

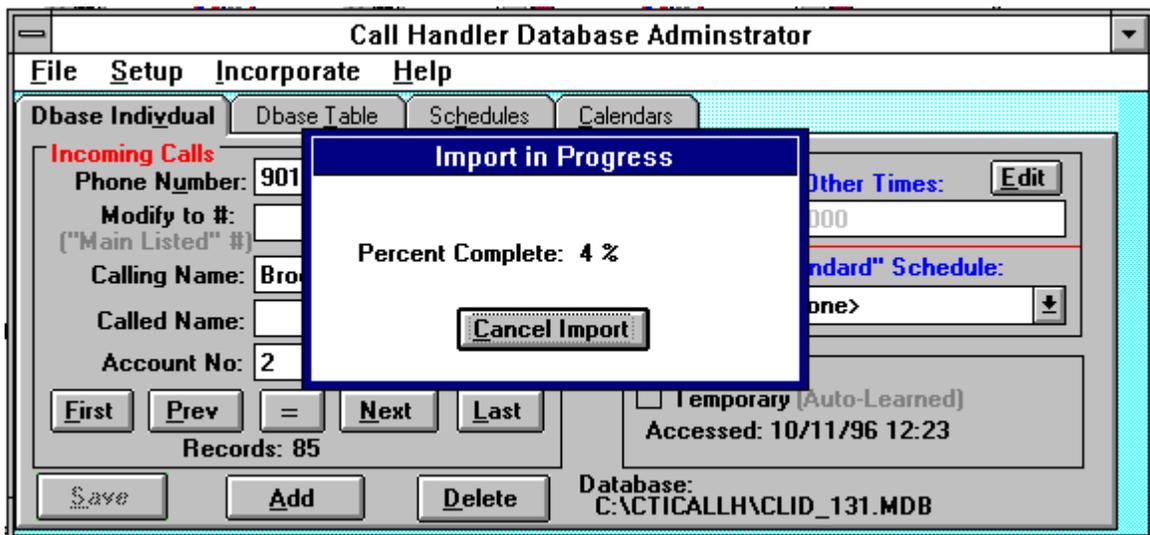
(8 fields) Only field number 4, the **Destination**, will take the default value from the Setup entry screen; all other fields, except for the first one, will be blank regardless of whether or not there are default entries for them.

,New Foods,439866,"V299,254",2129460900,,,@DEF

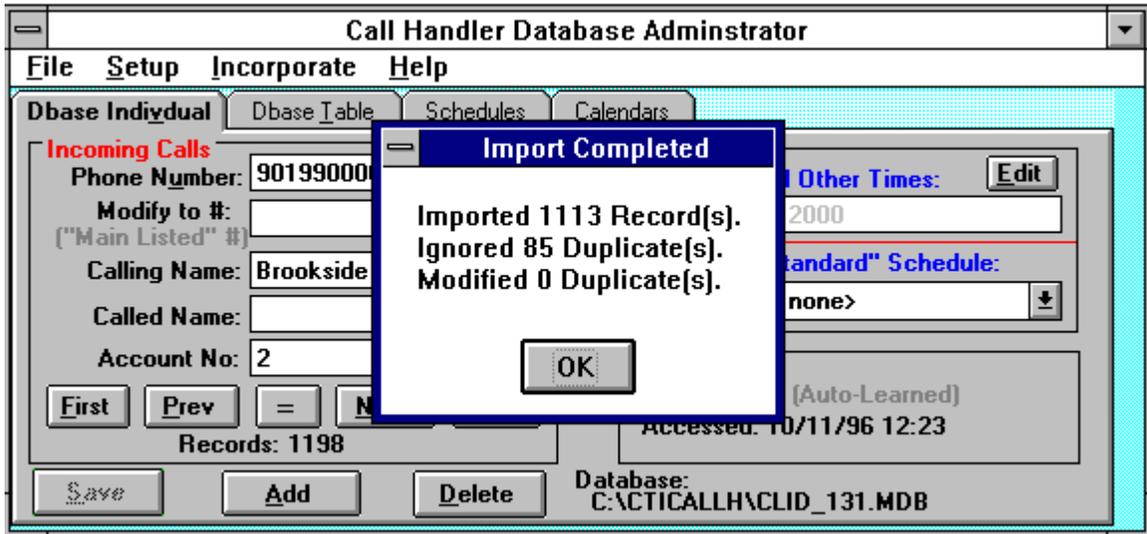
(8 fields) This is a record with no **Calling Number** (be careful, because without a **Calling Number**, duplicate records can be accidentally created). Field number 4, the **Destination**, is in quotes because the code for sending a call to Voice Mail includes a comma. A **Modify To #** field is entered as part of the record, but field 8, the **Schedule**, is taken from the default entry on the Setup screen, if there is one.

Import

When the **Import** button is selected, the following screen will appear:



While the records are being imported, *Call Administrator* is rendered inactive. The import process can be aborted by pressing the **Cancel Import** button at any time. If aborted, records already read will become part of the database, but no further records will be imported. Whether the process was canceled or not, a dialog box will let you know the results of the import when it is finished.



Setup

Auto Import

When enabled, the automated import feature monitors for the appearance of new import files. When an import file is detected it is automatically imported into the database. For the automated import feature to work *Call Router Administrator* must be running. It will monitor its own program sub-directory for import files, which are any files with the suffix of IMP (ex: CUSTASC.IMP). Once a file has been imported, it is automatically deleted to protect against duplicate imports. If the import process is aborted by pressing the **Cancel** key, the import file will not be deleted, making it available to the next *Auto Import* cycle.

It is important to remember that the *Auto Import* feature works through *Call Router Administrator*. All the settings and configurations that apply to *Call Router Administrator* are automatically passed through to the *Auto Import* feature. This means that because *Call Router Administrator* can be set up on different PC's on the network, there can be multiple versions of the *Auto Import* feature running at the same time. It also means that because *Call Router Administrator* can be used to open more than one database, that the *Auto Import* feature will import records into whatever database is currently open. Care should be taken that the correct database is being changed.

When the *Auto Import* feature has been enabled, the *Call Router Administrator* icon should be copied to the STARTUP group so that it will be automatically started if, for whatever reason, the PC is shut down and restarted.

When the *Auto Import* menu is selected the following screen appears:

Setup

Enable Auto Import - To enable the *Auto Import* feature click on one of the three time choices which represent how often the utility will check for a valid file to import: every minute, hour, or day.

On Duplicate Records - select one of the following options for dealing with a situation in which a duplicate **Calling Number** is encountered during the course of the import (a Null in the **Calling Number** field can never create a duplicate and any record with a Null in this field will automatically be added, whether or not there are duplications in any of the other fields):

Ignore Import - This will cause the program to automatically keep the existing record and ignore the record being imported.

Modify dBase - This will cause the program to automatically overwrite the existing record with the imported one, effectively deleting the old one.

File Options

Create Result File - If selected, a results file will be stored in the same directory and have the same name as the import file except the filename will have a IMR suffix (ex: CUSTASC.IMR). The results file is constructed so that the failed records are copied exactly as they were in the import file so that the results file can be imported again once corrections are made. The format of the file is as follows:

```
//Import Results for file: xxxxxx
//Date: xx/xx/yy
//Time: hh:mm
..... individual listing of failed records
//Failed to Import - ..reason for failure:
..... copy of failed record
//Failed to Import - ..reason for failure:
..... copy of failed record
//Failed to Import - ..reason for failure:
..... copy of failed record
...
//Count of New Imported Records: x,xxx,xxx
//Duplicate Records Ignored: x,xxx,xxx
//Duplicate Records Overwritten: x,xxx,xxx
//Count of Failed Import Records: x,xxx,xxx
```

Miscellaneous Line Syntax

Comment Records - Comment records can be imbedded anywhere in the import file. These comment records will be simply ignored by the import process. A comment record always starts with two forward slashes, followed by any comment string, and then ends with a <CR><LF>. For example:

```
// This is a comment. <CR><LF>
```

Field Definitions

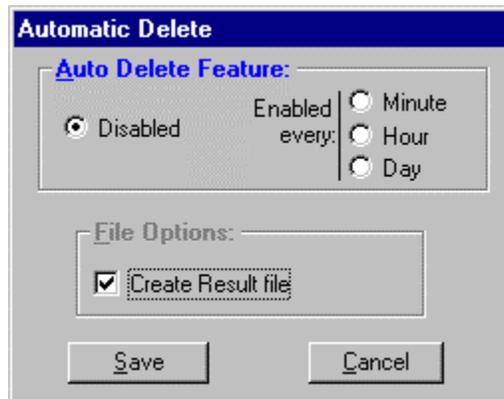
See the discussion of **Field Definitions, Defaults, and Examples** in the *Import a File* section, page 19.

Auto Delete

Like the *Auto Import*, *Call Router Administrator* can be programmed to automatically delete records from the *Call-Routing Database*. For the automated delete feature to work *Call Router Administrator* must be running. It will monitor its own program sub-directory for delete files, which are any files with the suffix of DEL (ex: OLDCUST.DEL). Once these files have been processed, they will be automatically deleted. If the delete process is aborted by pressing the **Cancel** key, the delete file will not be deleted, making it available to the next *Auto Delete* cycle.

See the discussion in the *Auto Import* section regarding the settings of *Call Router Administrator*.

When the *Auto Delete* menu is selected the following screen appears:



Setup

Enable Auto Delete - To enable the *Auto Delete* feature click on one of the three time choices which represent how often the utility will check for a valid file to delete: every minute, hour, or day.

File Options

Create Result File - If selected, a results file will be stored in the same directory and have the same name as the delete file except the filename will have a DER suffix (ex: OLDCUST.DER). The results file is constructed so that the failed records are copied exactly as they were in the delete file so that the results file can be used again once corrections are made. The format of the file is as follows:

```
//Delete Results for file: xxxxxx
```

```
//Date: xx/xx/yy
```

```
//Time: hh:mm
```

```
..... individual Failed records
```

```
//Reason for Failure: ???????
```

```
...
```

```
//Count Successfully Deleted Records: x,xxx,xxx
```

```
//Count of Failed Delete Records: x,xxx,xxx
```

Miscellaneous Line Syntax

Like the import files, **Comment Records** can be imbedded in the delete files as well.
See the discussion above.

Field Definitions

The format of the delete records is as follows:

```
@@DELETE,<FieldName>,"<Field Value>"<CR><LF>
```

The system searches the database for the first match of the **Field Value** in the specific field, and if the match occurs, then that record is deleted from the database.

The allowed **Field Names** are as follows:

```
CALLING_PHONE  
CALLING_NAME  
ACCOUNT  
CALLED_PHONE  
CALLED_NAME
```

Examples

An ASCII delete file might look like the following (the *Carriage Return* and *Line Feed* indications would not normally be seen and are indicated here as a reminder that they must be included):

```
@@DELETE, CALLING_PHONE, 5054388032<CR><LF>  
@@DELETE, CALLING_NAME, "Travis, William"<CR><LF>  
@@DELETE, CALLING_NAME, Pretty Rugs<CR><LF>  
@@DELETE, CALLING_PHONE, 202<CR><LF>  
@@DELETE, ACCOUNT, 439866<CR><LF>
```

Incorporate Records

Old Version DBase

This menu choice allows you to import the records from a previous version of the *Call Routing Database*. This import screen looks and operates the same as the *Incorporate / Unknown DBase* screen, as described below.

Note: When you import records from an old version database, any time-of-day routing that you had programmed for the old database records will be lost in the move.

Unknown DBase

Incorporate can and should be used to import any data from another MS Access database to the primary database, including but not limited to the *Unknown Caller Database*. If you are importing from a database other than the *Unknown Database*, the field names and types must be identical to those of the *Unknown Database*.

When you select **Incorporate** from the Main Database Menu, the program will prompt you for the name and directory of the database from which you want to import records. The *Unknown Caller Database* will always be named UNKNOWN.MDB and will always be located in the same directory as the *Call-Routing Database*.

When the second database is opened, the screen will look like the one below.

The screenshot displays the 'Call Handler Database Administrator' window. The top menu bar includes 'File', 'Incorporate', and 'Help'. Below the menu are tabs for 'Dbase Individual', 'Dbase Table', 'Schedules', and 'Calendars'. The main area is divided into two sections:

- Incoming Calls (Top Section):**
 - Phone Number: 0000000000
 - Modify to #: [Empty]
 - Calling Name: Unknown
 - Called Name: [Empty]
 - Account No: [Empty]
 - Buttons: First, Prev, =, Next, Last
 - Records: 10
 - Buttons: Save, Add, Delete
 - Database: CLID_131.MDB
- Calls (Bottom Section):**
 - Phone Number: 5054388032
 - Caller Name: Golden Gate
 - Account No: [Empty]
 - Buttons: First, Prey, =, Next, Last
 - Records: 1
 - Buttons: Save, Delete Record
 - Buttons: Move Record, Move All
 - Transfer To: [Empty] (with Edit button)
 - Destination: [Empty]
 - "Unknown" Database: UNKNOWN.MDB
 - Buttons: Done, Print Report, Delete ALL

Two pink arrows point to the 'Transfer To' field in the 'Incoming Calls' section and the 'Transfer To' field in the 'Calls' section.

Edit Unknown Caller Records

Records in the *Unknown Database* can be edited or deleted in the same fashion as records in the *Call-Routing Database* are edited and deleted. You can edit these records before you move them to the *Call-Routing Database* or once they have been moved. One way or the other may be easier depending on your specific situation.

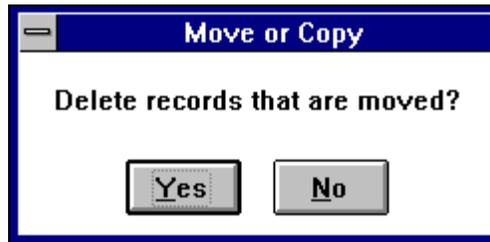
Move a Record

To move a record to the *Call-Routing Database* from the *Unknown Database*, search or scroll through the records until the one you want to move is visible. If you edit the record, save your changes by clicking the **Save** button. Then simply click on the **Move Record** button, and the record is moved to the main *Call-Routing Database*.

Move All Records

You can move all the records in the *Unknown Database* by clicking on the **Move All** button. If you want to do this, it is suggested you weed out all the records that you do not want or can not identify first so that your main *Call-Routing Database* does not become cluttered and difficult to work with.

When you click on either of the **Move** buttons, a dialogue box will ask you if you want to delete the original record(s).



This gives you the option of moving or copying the unknown or imported records.

Print Report

If you have a printer connected to the LPT1 port, clicking this selection will give you a printed report of the records in your *Unknown Database*. This report can be a helpful tool in trying to establish how the numbers should be routed in the future.

Done

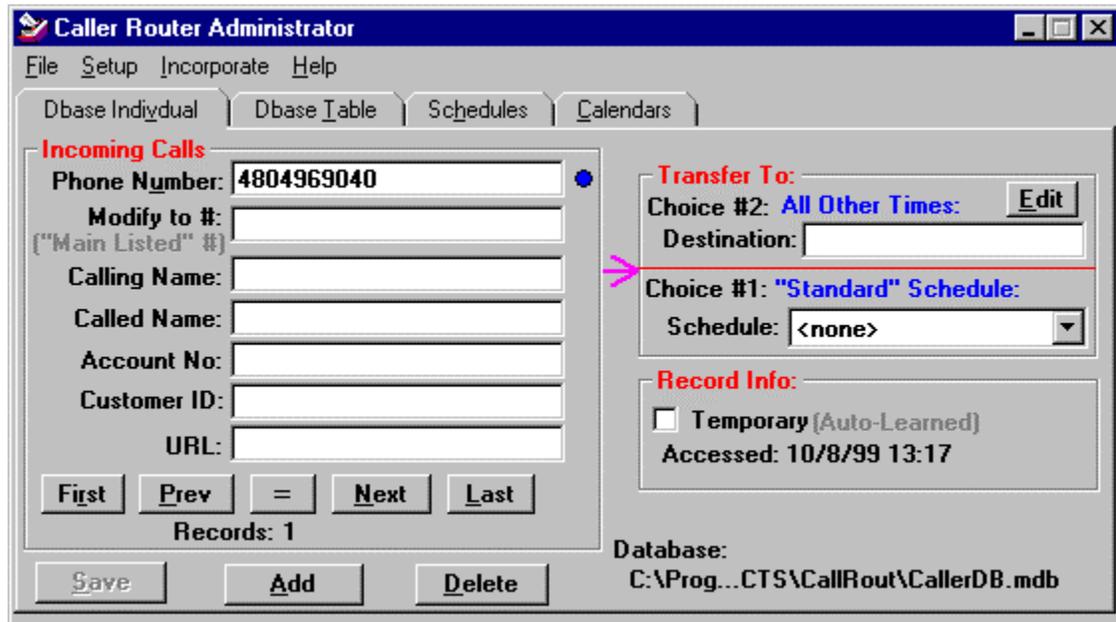
When you are finished updating your *Call-Routing Database* with unknown caller records, click the **Done** button and the *Unknown Database* portion of the screen will be erased from the screen.

Help

Select Help to open the on line help file for *Call Administrator*.

Tab Choices

DBase Individual



Incoming Calls

Phone Number

This is an optional field. However, if it has anything in it at all, that entry must be unique. When a call is received with either CallerID / ANI or DID / DNIS information, and the equivalent search options are enabled in the *Preferences / Database* section of *Call Router*, this **Phone Number** field is searched for a match.

Modify to # (“Main Listed” #)

This is an optional field which is required to be either 10 digits or blank. If the **Replace Calling Number with “Main #”** box in the *Preferences / Modify* section of *Call Router* is selected, this number will be substituted as the CallerID of the calling party when a match is made.

This field can be useful if you have a Bell Operating Company that sends you the CallerID of the actual number being used rather than the Main or Listed number of the trunk group but, in your application, you need the actual Main or Listed number of the caller to be the number that is passed with the call.

Calling Name

This is an optional field of up to sixteen letters or digits describing the caller. This field can be used for searching based on the current **Name** attached to the call, or it can be used to *Modify* the call with this Name entry.

Whether or not you intend to search this field or *Modify* the call with the **Attach Name** option, it is a good idea to enter some identifying name in this field so that the record will always make sense when it is brought up by *Call Router Administrator*.

Called Name

This is an optional field of up to sixteen letters or digits describing the name of the called party.

As explained in the *Preferences / Database* portion of this manual, if an incoming call is not a DID/DNIS call, *Axxess* will attach the trunk name of the incoming trunk to the data string of the call in the place where the DID/DNIS name is normally placed. Because of this, if the user enables the **Do Called Name Search** option under *Preferences / Database* in *Call Router* and the incoming call is not DID/DNIS, the call can be routed based on the trunk name entered in the **Called Name** field of the database.

When the **FWDed CO Call Information** search is enabled, this field is checked for the Forwarding Extension number of the call. In this way, calls can be routed based on the extension that forwarded them to the *Call Router* monitored extension.

Account No.

This is an optional field of up to thirty-two digits for the **Account Number** that you want to associate with the selected phone number. This field can be used for searching based on current **Account Number** information attached to the call, or it can be used to *Modify* the call with this **Account Number** entry.

Note: For purposes of searching, this field allows up to thirty-two digits; however, if you modify the call by enabling **Attach Account Code** under *Preferences / Call Modify* in *Call Router*, the *Axxess* Phone System currently only permits Account Codes of twelve digits and the attached Account Code will be truncated if it is any longer than twelve digits.

Customer ID

This is an optional field of up to 32 alphanumeric digits for the **Customer ID Number** that you want to associate with the selected phone number. This field can be used for searching based on current **Customer ID** information attached to the call, or it can be used to *Modify* the call with **this Customer ID entry**.

URL

This optional field can be used to enter a specific URL that you want to associate with the selected phone number.

Transfer to

Once a match has been made by the search, every Record has two possible destinations for Call-Routing, and they are applied in the following order: (1) a **Segment Destination** based on a designated **Schedule**, or (2) a **Choice #2** destination if there is no Schedule or no match on a designated Schedule.

If no match is made, there are two possible default routing destinations that are applied in the following order: (1) routing according to the destination specified in the *Unknown Caller Record*, or, if there is no *Unknown Caller Record* or if the *Unknown Caller Record* has already been used, (2) the **Default Destination** as specified in the *Preferences / Call Routing* section of *Call Router*.
for more information on the Unknown Caller Record, see page 29

Choice #1 - Schedule

Every record can have a **Schedule** associated with it for Routing based on time-of-day and day-of-week, with options for excluding or including certain days of the year. If no Schedule is wanted or needed, select **<none>** for this box.

If you select **<none>**, *Call Router* will automatically go to the next option, **Choice #2 - All Other Times**, for its Routing instructions.

If, however, a valid **Schedule** is selected for this option, *Call Router* will search the **Schedule Settings** to determine which, if any, of the **Segment Destinations** should be used. This search goes as follows:

- The **Schedule Segments** will be searched in numerical order to see if the current time falls between the **Start Time** and **Stop Time**. If the current time does not fall between the **Start Time** and **Stop Time** of the current **Schedule Segment**, the search moves on to the next **Segment** looking for a match.
It is possible to have overlapping time segments, so keep in mind that the search is done by **Segment Number** and that it will move on to the next step as soon as it finds a match. Also, if the **Start Time** and **Stop Time** are blank, it will automatically create a match.
- If the current time does fall between the **Start Time** and **Stop Time** of one of the **Schedule Segments**, then the program will check to see if the current **Weekday** is enabled in the matched **Schedule Segment**. If the current day of the week is not enabled in the matched **Schedule Segment**, the search moves on to the next **Segment**.
- If the time and the day of the week have both been matched, then the search will check the **Calendar** that has been applied to the matched **Schedule Segment**. If **<none>** has been entered for the **Calendar** option, then the call is routed to the **Segment Destination** and the search is finished.

If there is a **Calendar** specified, then the program will check to see if the current date falls between any of the **Begin Date** and **End Date** entries. The program will also check to see if the specified **Calendar** is marked as **Except on these Dates** or **Only on these Dates**. Based on the information programmed in these fields, one of the following actions will result:

Current Date is between Begin Date and End Date	Except on these Dates Enabled	Only on these Dates Enabled	Action
Yes	Yes		No Match, continue Search
Yes		Yes	Route Call to Segment Destination
No	Yes		Route Call to Segment Destination
No		Yes	No Match, continue Search

- The search through the designated **Schedule** for any given record is completed whenever a match of the time-of-day, day-of-week, and calendar is made as detailed above. *Call Router* will keep searching **Segments** of the **Schedule** until it makes such a match or until there are no more segments to search. If all segments have been searched, and still no match is made, then routing will be based on **Choice #2 - All Other Times**.

Note - if a match is made on any given **Segment**, but there is no entry or a blank entry in the **Segment Destination**, the search is considered complete but without any destination defined *Call Router* will default to **Choice #2 - All Other Times** for further routing instructions.

Choice #2 - All Other Times

This is an optional field of up to twelve digits to determine where a call is to be routed if **Choice #1 - Schedule** does not have an entry or does not find a match. This number can be an Intercom Extension, a combination of an extension number and Voice Mailbox number, an Outside Number, or a *Voice Action Script* to be processed by *Voice Assistant*, if it is installed. If a *Voice Action Script* is entered and *Voice Assistant* has not been installed, then this, like any other invalid or null entry, is ignored, and the routing decision will be passed on to the third option, the **Default Destination** as defined by *Preferences / Call-Routing* in *Call Router*. In order to program the **Choice #2 - All Other Times** destination of any given Record, click on the **Edit** button next to the text box for this entry. The *Edit Destination* box will appear.

see *Edit Destination*, page 36

Record Info

Temporary

This box is checked if the current record was automatically inserted by the **Auto-Learn Feature** set in the *Preferences / Database* section of *Call Router*. An automatically inserted record is considered “temporary” until someone has reviewed it and made it “permanent” by de-selecting this box. Using the **Temporary** feature insures that no bad or unwanted records which may have been inserted escape the notice of the Call Administrator.

The status of this check box does not affect the use or performance of the information in the record.

Accessed

This is a line of information stating the last date and time that the current record was accessed. This information is updated anytime a change is made to the record using *Call Administrator*, or anytime *Call Router* uses the record for routing a call. By looking at this information, the Call Administrator can quickly determine if the current record is active or whether it might no longer be necessary and can be deleted.

Database Records

Special “Unknown Caller” Record

A record with the **Phone Number** field equal to ten zeroes (0000000000) is a special “Unknown Caller” record. If this record exists, and no match is found on any of the database searches selected in the *Preferences / Database* section of the *Call Router* programming, then the **Name**, **Account No.** and **Destination** information from this record will be used in making call modifications and determining call routing.

This number can be used as a Default Destination, providing scheduling flexibility and *Voice Assistant* options for calls that do not have a match in the database. However, a call can only be routed by the “Unknown Caller” record one time. If the same call returns to *Call Router* again, from *Voice Assistant* for example, and again there is not a match, it will be routed according to the *Default Destination* information in the *Preferences / Call* section of *Call-Router*.

Viewing

You can view the database records by using the **First**, **Previous**, **Next**, and **Last** buttons in the **Call Router Administrator** form.

The field that determines the order in which they are scrolled is indicated by the button to the right of the text box. This selection can be changed by simply clicking inside the text box of the field you want to use for sorting. The button will change with your selection.

To search for a specific record, overwrite the existing information in whichever text box you want to specify as your search criteria. When you have entered the search specifications, press the = button. If an exact match is not found, the closest possible match is returned.

Adding

To add a new record to the database, first press the **Add** button. All the fields will be cleared. Enter the new information in each of the text boxes for each of the fields that you want to use. When the information is correct, press the **Save** button.

If you enter a number in the **Phone Number** field which already exists in the database, you will get an error message saying that the number is a duplicate and the addition will not be made.

Changing

To change a record in the database, make the record you want to change the active record, make the changes you want, and then click on the **Save** button.

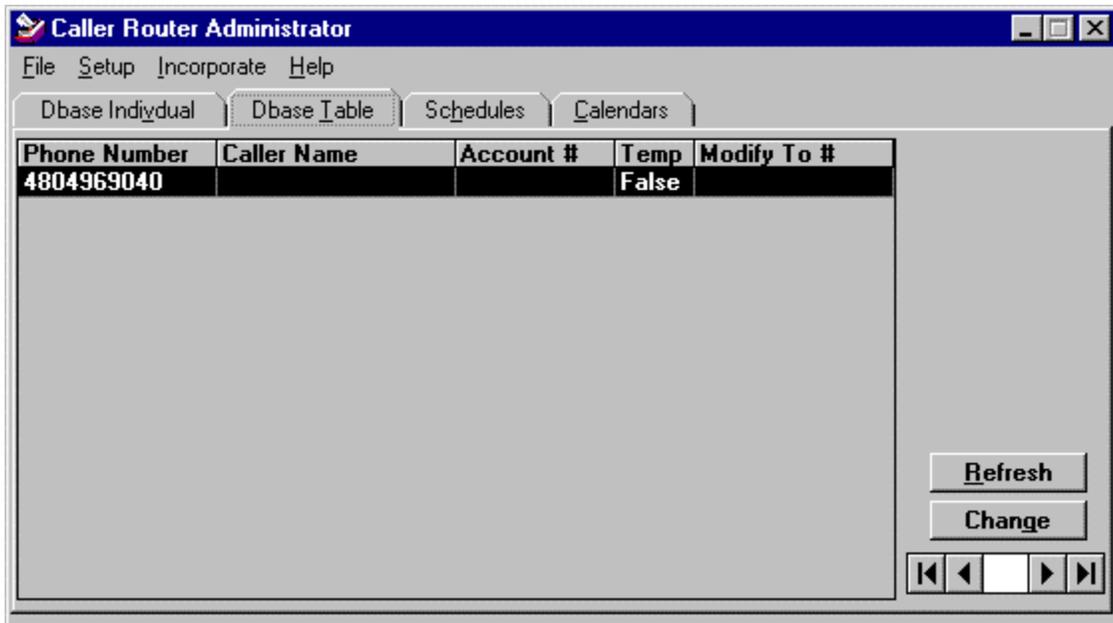
Saving

When a database record is first displayed, the **Save** button is disabled. If a change is made to any portion of the record, including the destination, the **Save** button automatically becomes enabled.

Deleting

To delete a record from the database, first scroll through the records or use the search option until the record you want to delete is the record that you see in the form. *Call Administrator* will ask you if you really want to delete the selected record.

DBase Table



This form allows a scrolling, table view of the currently selected database. If you highlight a Record and click **Change**, the program will return you to the **DBase Individual** view of that Record. Double-clicking on any entry will do the same thing.

The Table view of the database is sorted by the **Phone Number** field by default, but if you want to scroll through the records based on a sort by **Caller Name**, **Account #**, **Modify To #**, or **Temp**(orary) status simply drag and drop that column to the first position on the left and the sort will be re-done.

Refresh - The Table view is not constantly refreshed because with large databases this would be a constant drain on screen time. Automatic refreshes are done whenever a change is made from the **DBase Individual** form and the **DBase Table** form is re-selected. However, if you want to make sure that the Table view includes all the changes made by both your PC and other PC's on the network, you can press the **Refresh** button.

Schedules

This form allows you to enter any number of routing schedules based on time-of-day, day-of-week, and date-of-year. As a sub-set of every **Schedule**, there are as many **Segments** as you might need to specify different time slices. And, as a sub-set of every **Segment**, there are **Weekday** and **Calendar** entries which further refine the definition of a **Schedule**. Schedules provide flexible, powerful routing tables which should only be used with planning and an understanding of the tools.

The Schedule

Every Record can specify, at the most, only one Routing Schedule, but you can create as many Schedules as you need to implement your full routing plan.

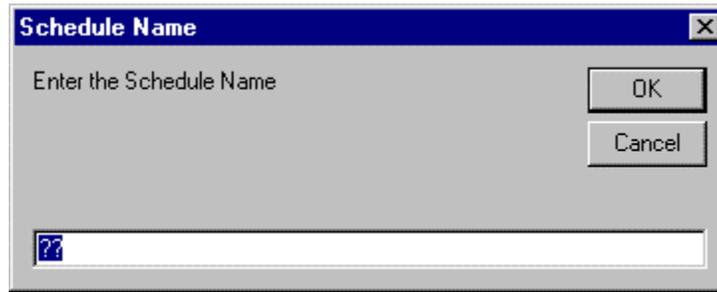
Schedules sometimes are organized around work groups, such as Sales Personnel, or work shifts in a plant. Some groups might consist of one person, such as a receptionist. If you organize your schedules in this way, when you are entering routing information for an incoming call, it makes sense to say “send that call to Sales,” or “that call should go to the Receptionist.”

Schedules can also be created for a typical day rather than for groups. You can create a schedule called “Workday” and set it to mirror the logical flow of your company’s work day, sending calls to an ACD group during the busy first few hours of the day, to a Receptionist during the rest of the morning until lunch, when the Bookkeeper covers the incoming calls, back to the Receptionist at one, back to an ACD group late in the afternoon when the calls begin to pick up again, and then to an auto-attendant after hours. Different types of incoming calls might warrant different schedules, and you might have a “Workday - Service Call” schedule and a “Workday - Customer Information” schedule as well.

Many different approaches may all be applicable in one environment. Whatever makes sense for your application, once the schedules have been created, it is a simple matter to pick the one you want to apply as you enter new Call Records into the *Call-Routing Database*.

Modify an Existing Schedule - To modify an existing schedule, select the schedule you want to modify by choosing it from the drop-down list beside **Schedule**. You can then select whatever Segment you want to change, make the changes you need, and press **Update** to save them.

Add New Schedule - When you click this button, a **Schedule Name** dialogue box appears. Enter the name of the schedule you are adding and click **OK**.



The Schedule that you have just added is entered and you can now begin defining its Segments.

Delete Schedule - To delete a schedule, be careful to select the right schedule from the drop-down list next to **Schedule**. Schedules frequently represent a lot of work, so you want to be careful to get the proper one. Then click on **Delete Schedule**. The program will ask you to verify that this is really what you want to do.

If you click on **Yes**, the schedule will be deleted.

The Segment

Once you have entered a new Schedule, you need to enter all the various **Segments** of that Schedule that you want to define. Segments consist of **Start** and **Stop Times**, **Weekday** selections, **Calendar** references, and **Destination** information. A typical Segment might be described, in plain English, something like this: “every weekday (Monday through Friday) between 8 and 5, except on all of the official company holidays, route calls to ...”

Using the **Add** button, you can add as many Segments as you need. The program will automatically give the new segment the next available number; the name will be defaulted to “??”. Once you have added a Segment, you can give it a name and enter all of the criteria as detailed below. When you have made all the changes, press **Update** to save them.

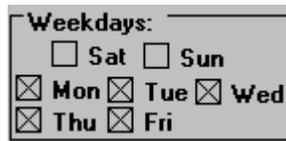
If at any time you want to change or delete an existing Segment, select it in the **Schedule Segment** box by pressing **Prev** and **Next** until the desired number appears. To make modifications, make the changes you want, and press **Update**. To delete the segment, click on **Delete**. The program will ask you to verify that this is really what you want to do. If you answer **Yes**, that Segment will be deleted from that Schedule.

Start / Stop Times

Start Time: Stop Time:

Enter the **Start** and **Stop** time of the day for this Segment. Any time falling between these entries will make this Segment a match when *Call Router* is searching for routing information. When entering times, you must specify AM or PM by either typing in ‘AM’ or ‘PM’ or by using military time. The following formats are all valid: 8:00, 8:00A, 8:00AM, 8 AM, 17:00, 5:00P, 5:00PM, 5 PM. The program will display an error message if you use an invalid format.

Weekdays



Weekdays:

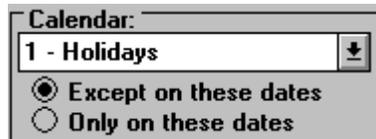
Sat Sun

Mon Tue Wed

Thu Fri

In this section, select the days of the week that you want this Segment to be used. When *Call Router* is searching for routing information, if the current day of the week does not have an **X** next to it here, this Segment will not be used.

Calendar



Calendar:

1 - Holidays

Except on these dates

Only on these dates

If you want to apply any specific days of the year to your Segment, you do that by selecting a **Calendar** reference. If you do not, make sure that **<none>** is entered in this drop-down box. If the calendar you need does not exist yet, make a new calendar as detailed in the *Calendar* section below, and then return to your Segment and add it in.

When you select a Calendar, you have to specify whether you want your Segment to use the dates of the calendar as exceptions, or as the rule. Do this by picking either **Except on these dates** or **Only on these dates**.

Except on these dates - If you pick this option, it means that the dates listed in the Calendar specified will disqualify this Segment from being used. If Christmas (12/25/95) is one of the dates listed in the Calendar, for example, selecting this option means that even if the time and day of the week are a match for an incoming call, if it is also December 25, 1995, then this segment will not be used in determining the routing.

Only on these dates - If you pick this option, it means that the dates listed in the Calendar specified will be the only dates on which this segment is used. If Christmas (12/25/95) is one of the dates listed in the Calendar, for example, selecting this option means that if the time and day of the week are a match for an incoming call, if it is also December 25, 1995, then this segment will be used in determining the routing.

see also the discussion on the Transfer To area of the DBase Individual form, page 27

Destination



Destination: V134,205

Finally, you should enter the routing destination for a call should all the criteria for this segment be met. Click the **Edit** button to bring up the *Edit Destination* dialogue box, enter the destination, and when you click OK your selection will be written in gray in the destination text box.

see Edit Destination, page 36

If you neglect to make a destination entry, and this segment produces a match on an incoming call, the routing instructions will default to **Choice #2 - All other times** for that record.

Calendars

Caller Router Administrator

File Setup Incorporate Help

Dbase Individual Dbase Table Schedules Calendars

Calendar: 3 - New Year's Day 2000 Description: New Year's Day 2000

Add New Calendar Delete Calendar

Dates:

Begin Date	End Date	Description
1/1/00	1/1/00	New Year's Day 2000

Add Change Delete

Use the **Calendar** screen form for **Adding** new calendars and **Modifying** or **Deleting** existing ones.

Adding a New Calendar - To Add a new calendar, click on the **Add New Calendar** button. A *Calendar Name* dialogue box will appear.

Calendar Name

Enter the Calendar Name

OK

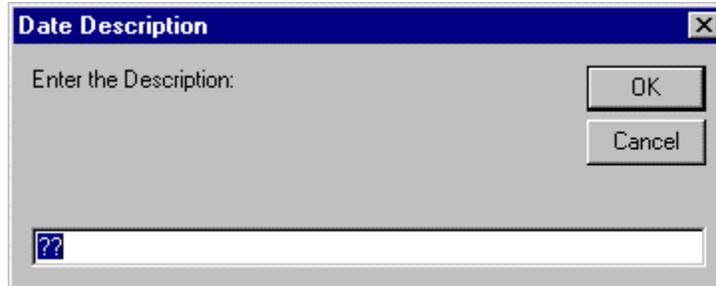
Cancel

??

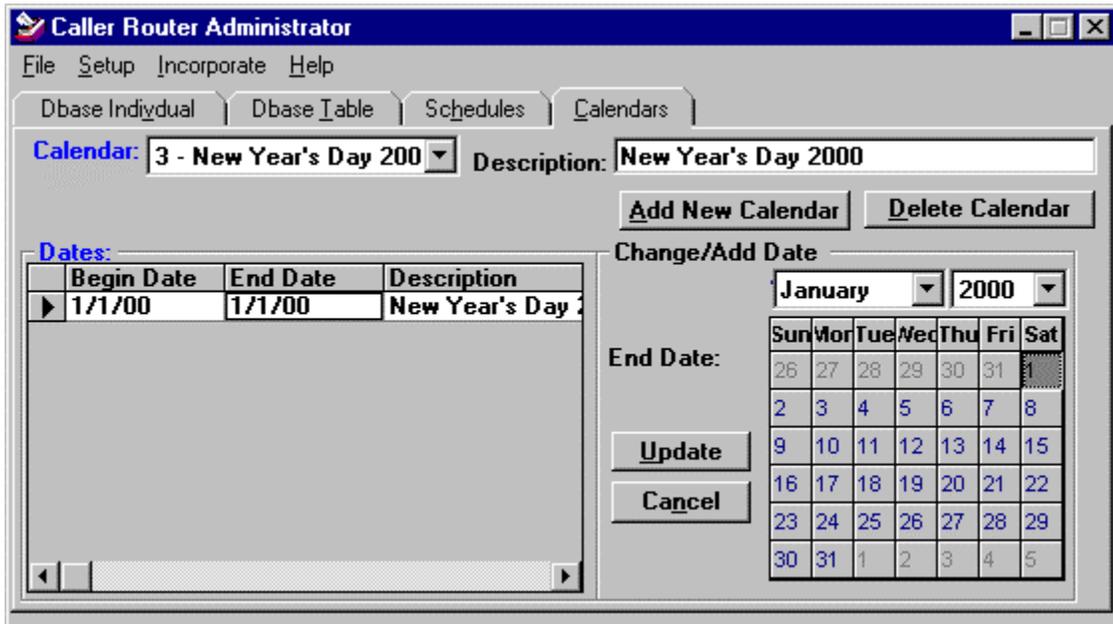
Enter an appropriate name in the description box and click **OK**. You can now start entering the dates that you want included on this Calendar by using the Modify procedures.

Modify a Calendar - In the calendar drop-down box, select the calendar you want to modify. The existing dates specified will be displayed in the Dates section. If this is a new calendar, this area will be blank.

To add a new date, click the **Add** button. A dialogue box will appear to enter the **Description**. Enter a name that suits the entry you are making and click on **OK**.



Now, you can modify the empty record by clicking the **Change** button. Selecting the **Change** button will allow you to edit the **Begin Date** information, because that is the column highlighted on the **Dates** form.



On the little calendar, find the beginning date for the entry you are making by scrolling through the years, months, and days. Click it so that it is highlighted, and press **Update**. The date you have selected will now be written in the **Begin Date** column for this entry.

To edit the **End Date** or **Description**, highlight one of those columns and click **Change**.

Repeat these steps until you have all the dates entered and labeled for this calendar that you want. If you only want to specify one date rather than a range of dates, enter that date in the **Begin Date** column and leave the **End Date** column blank.

Deleting a Date - To delete a date, highlight any of the three columns for that date and click the **Delete** button. The program will ask you to verify that this is really what you want to do. If you answer yes, the entry will be deleted.

Edit Destination

Intercom Extension

This form allows you to enter a simple extension number, or an extension number in combination with a Voice Mailbox number. If you enter a Voice Mailbox number, the call is routed as follows: it is routed first to the extension specified, but when and if the call is forwarded to Voice Mail, it is routed to the mailbox number specified.

For example, you want to route service calls to Bob at extension 214 but if they go to voice mail you want them to go to a special “Service Mailbox” number 2349 instead of to Bob’s personal voice mailbox, then you would enter 214 for the **Extension**, and 2349 for the **Vmbox**.

In addition, you can use this same format to route calls to something like a fax mailbox by first entering the system fax mailbox number (299, for example) and then entering the specific mailbox that you want to send the call to (312, for example).

Outside Party

This form allows you to route calls to an outside number.

The Trunk Access Code is optional on this form. If you leave this field blank, *Call Router* will use the **Default Trunk Access Code** programmed in *Preferences / Call Routing*. If you want to use an Access Code other than the default one, enter it here. Then enter the outside phone number you want to route the call to just as if you were dialing it, including a “1” and Area Code if necessary.

Voice Assistant

In the Edit Destination dialogue box, if *Voice Assistant* is a permitted destination, the *Voice Assistant* radio button will be available. Choosing this radio button will bring up the entry form for entering scripts and their parameters as shown below.



The screenshot shows a dialog box titled "Edit Destination". On the left, there are three radio buttons: "IC Extension", "Outside Party", and "Voice Assistant". The "Voice Assistant" radio button is selected. To the right of the radio buttons, there is a "Script #" field with a small "Details" button next to it. Below that is a "Params:" field, which is empty. Below that is a "Description:" field containing the text "??". At the bottom of the dialog box, there are two buttons: "Ok" and "Cancel".

Script #

Enter the number for the *Voice Action Script* that you want to apply to this destination. Enter one of the five scripts provided in the *Reserved Set* or the number of a custom programmed script created by you. Make sure you enter a valid script number.

Parameters

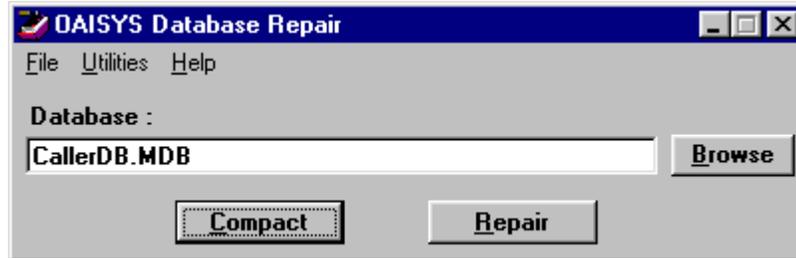
Using commas to separate them, enter the parameters needed by the script you have chosen. All parameters must be entered. If you want to use the default for a parameter, you still must enter a comma (or blank) to represent the parameter.

Save the Destination

Important: Once you have entered the Destination and clicked OK to register it, do not forget to then press the **Save** button to record your changes for that Record.

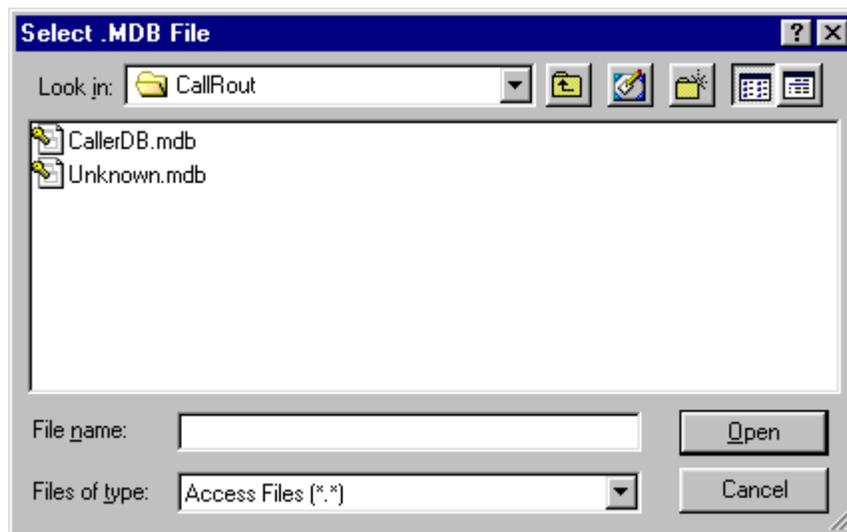
Database Repair

The **OAISYS Database Repair** program is a companion program for *Call Router*. This program provides a way to **Repair** and **Compact** a *Call-Routing Database* that is used by *Call Router* to route calls.



Browse

Use this button to select a Database other than the default Database currently selected.



Repair / Compact

Typically both processes, **Repair** and **Compact**, should be done periodically to the main *Call-Routing Database* (CLID_131.MDB) used by *Call Router*. Also, both of these processes should be done on any 'new' database before it is Incorporated into the main *Call-Routing Database* see *Incorporate Records*, page 23

Both **Repair** and **Compact** work by creating a temporary database. When the process is completed, you are given the option to delete the temporary database:

Select **Yes**. If the temporary database is not deleted, the next **Repair** or **Compact** that you initiate will return an error message. If you select **No**, the temporary database can be deleted later by using the menu selection **Utilities / Delete Temporary Copy of Database**.

Appendix A: Call Variables

Tokens

Tokens can be used to insert run-time information into database fields, which can then be used to modify the information on a call. This run-time data insertion occurs only after a successful search and match.

The following database fields can have tokens: **Modify To #, Calling Name, Account No, Destination.**

It is important to note that when tokens are placed in a database field, that field should not be used in a search criteria, because the data insertion only happens AFTER a successful search. For example, you could NOT put the **%P** token in the **Account No.** field and then search by account number (expecting it to find an account number matching the calling phone number).

Tokens Types:

- %P** - Calling Phone Number
- %H** - Calling Phone Number (Hyphenated)
- %N** - Calling Name
- %E** - Called Phone Number
- %G** - Called Phone Number (Hyphenated)
- %F** - Called Named
- %A** - Account Number

Token Components:

- %** - Indicates Token to Follow
- +** (*plus sign*) - Keep the first digits/chars (starting from the beginning)
- (*minus sign*) - Keep the trailing digits/chars (starting from the end)
- (number)** - Number of digits/characters to keep
- (letter)** - Token Type (i.e. **P** is the calling phone number)

Examples:

%-7P

The last 7 digits of the calling phone number ("5054388032" would be "4388032")

%+3P

The first 3 digits of the calling phone number ("5054388032" would be "505")

(505)%-7P

(505) plus the last 7 digits of the calling phone number ("5054388032" would be "(505)4388032") or ("4388032" would be "(505)4388032")

(505)%-8H

(505) plus the last 8 digits of the Hyphenated phone number ("505-438-8032" would be "(505)438-8032") or ("438-8032" would be "(505)438-8032")

Appendix B: Voice Assistant

Standard Scripts

Script #1: Play message and hang up

Script Listing

1. //,Play Message and Hangup
2. ANSWER
3. PLAY,%1
4. HANGUP

Sample Entry



The screenshot shows the 'Edit Destination' dialog box. On the left, there are three radio buttons: 'IC Extension', 'Outside Party', and 'Voice Assistant'. The 'Voice Assistant' option is selected. To the right, there are three input fields: 'Script #' with the value '1', 'Params' with the value '8901', and 'Description' with the value '??'. There are 'Ok' and 'Cancel' buttons at the bottom, and a 'Details' button next to the 'Script #' field.

This script will play message number 8901 and then hang-up.
Direct entry equivalent: S,1,8901

Script #2: Play message, transfer call, and hang up

Script Listing

1. //,Play Message and Transfer Call
2. ANSWER
3. PLAY,%1
4. XFR,%2
5. HANGUP

Sample Entry



The screenshot shows the 'Edit Destination' dialog box. On the left, there are three radio buttons: 'IC Extension', 'Outside Party', and 'Voice Assistant'. The 'Voice Assistant' option is selected. To the right, there are three input fields: 'Script #' with the value '2', 'Params' with the value '102,1601', and 'Description' with the value '??'. There are 'Ok' and 'Cancel' buttons at the bottom, and a 'Details' button next to the 'Script #' field.

This script will play message number 102 (“Please hold while your call is forwarded”), transfer the call to extension 1601, and then hang-up.

Direct entry equivalent: S,2,102,1601

Script 3: Prompt for information, accept DTMF input, return call to Call Router

Script Listing

1. //,Get Phone #; Return call
2. ANSWER
3. PLAY,%1
4. GDIGITS,%2,%3,%4
5. PLAY,%5
6. RTN

Sample Entry

The screenshot shows a dialog box titled "Edit Destination". On the left, there are three radio buttons: "IC Extension", "Outside Party", and "Voice Assistant". The "Voice Assistant" option is selected. To the right of these buttons, there are three input fields: "Script #:" with the value "3", "Parms:" with the value "101,7,A,107", and "Description:" with the value "??". A "Details" button is located to the right of the "Script #:" field. At the bottom of the dialog box, there are "Ok" and "Cancel" buttons.

This script will play message number 101 (“Please enter your customer number then press Pound”), gather the DTMF input of the caller until either a maximum of 7 digits or a # sign is dialed, send the call back to *Call Router* with instructions to search the Account Numbers in the database for a match to the customer input, and play message 107 (“Thank You. Please Hold.”). Note that for parameter number 3, the terminating digit, the default # sign was used; however, an extra comma was needed to indicate the place of that parameter.

Direct entry equivalent: S,3,101,7,,A,107

Script 4: Play message and do a Centrex transfer

Script Listing

1. //,Play Message and Centrex Transfer Call
2. ANSWER
3. PLAY,%1
4. CXFR,%2
5. HANGUP

Sample Entry



Edit Destination

IC Extension

Outside Party

Voice Assistant

Script #: 4 Details

Params: 107,15054388032

Description: ??

Ok Cancel

This script will play message number 107 (“Thank you, please hold”), and then transfer the call to 1-505-438-8032 using a Centrex transfer.

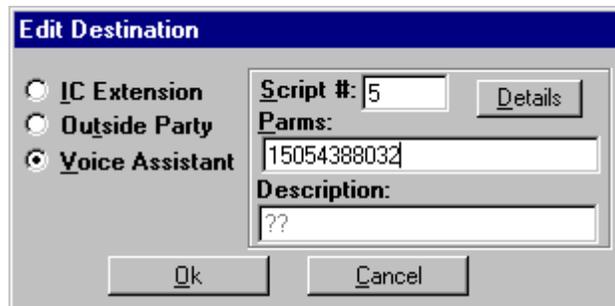
Direct entry equivalent: S,4,107,15054388032

Script 5: Centrex transfer

Script Listing

1. //,Unannounced Centrex Transfer Call
2. ANSWER
3. CXFR,%1
4. HANGUP

Sample Entry



Edit Destination

IC Extension

Outside Party

Voice Assistant

Script #: 5 Details

Params: 15054388032

Description: ??

Ok Cancel

This script will transfer the call to 1-505-438-8032 using a Centrex transfer.

Direct entry equivalent: S,4,107,15054388032

Appendix C: Errors & Troubleshooting

ERROR	Causes	Remedies
1. "Software Key Not Installed! Demo Mode Only" message displayed.	Software Key Not Installed on LPT1	Install Software key on LPT1
	Printer connected to Software key is Off-Line or Power is OFF	Disconnect printer cable or Power-Up printer and leave printer On-Line.
	Selected COM port is connected to a Modem not an OAI port	Setup Com port to the OAI port.