Kerauno User Knowledge Base PDF created 11/25/2019 10:44 am EST

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Start Here!

Last Modified on 11/12/2019 12:31 pm EST

What is Kerauno?

Kerauno is an easy-to-use communications workflow platform that powerfully connects people, process, software, and systems to build efficiencies, automate processes, and drive revenue to your business's bottom line.

What exactly is a workflow? It is a process or method used to get things done. Your company probably has hundreds of workflows that you never think about—everything from how you assign sales leads to handling monthly invoicing.

How can Kerauno help me?

Improve productivity with a suite of communication and collaboration tools through:

- Voice
- Chat
- Conference calling

Help your business stay connected with:

- Customers
- Vendors
- Employees

How do I use Kerauno?

- Cloud-based platform accessed from any device with a browser and internet connection.
- Bolt Softphone client provides a mobile office on the go connected via voice, video, and integrated chat.

What else can Kerauno do?

- Contact center with API integrations

- Analytics and reporting
- Interactive services

How do I get started?

Use the links below to start using Kerauno today:

Users - Getting Started Kit

Admins & Installers - Coming Soon!

HELP

View our Frequently Asked Questions or email us directly for assistance support@keraunouc.com.

Compliance

Last Modified on 09/26/2019 10:27 am EDT

Overview

Our UCaaS product is tested annually for security and vulnerability by [Pondurance](), a global security and threat mitigation company.

In addition, Kerauno UCaaS is fully compliant in the following:

FISMA

The Federal Information Security Management Act (FISMA) requires each federal agency to develop, document and implement an agency-wide program to provide information security for the information and information systems that support the operations and assets of the agency, including those provided or managed by another agency, contractor or other source.

Read more about FISMA Implementation and the Modernization Act of 2014.

HIPAA

The Health Insurance Portability and Accountability Act (HIPAA) sets the standard for sensitive patient data protection. Companies that deal with protected health information (PHI) must have physical, network, and process security measures in place and follow them to ensure HIPAA Compliance. Covered entities (anyone providing treatment, payment, and operations in healthcare) and business associates (anyone who has access to patient information and provides support in treatment, payment, or operations) must meet HIPAA Compliance. Other entities, such as subcontractors and any other related business associates must also be in compliance.

HIPAA compliance is delivered through our Business Associate Agreements.

Read more about HIPAA.

SOC 2®

AICPA's System and Organization Controls (SOC) for Service Organizations are internal control reports on the services provided by a service organization that shares valuable information users need to assess and address the risks associated with an outsourced service.

SOC 2 Reports are intended to meet the needs of a broad range of users that need detailed information and assurance about the controls at a service organization relevant to security, availability and processing integrity of the systems the service organization uses to process users' data, and the confidentiality and privacy of the information processed by these systems.

Read more about SOC.

PCI DATA SECURITY STANDARD

The PCI Data Security Standard (PCI DSS) provides an actionable framework for developing a robust payment card data security process, including prevention, detection and appropriate reaction to security incidents. The standards set the operational and technical requirements for organizations accepting or processing payment transactions, and for software developers and manufacturers of applications and devices used in those transactions.

Read more about PCI DSS.

CALEA

The Communications Assistance for Law Enforcement Act (CALEA) was enacted by Congress in 1994 to require telecommunications carriers to provide law enforcement with certain technical capabilities when they conduct lawful electronic surveillance on telecommunications networks. The Federal Communications Commission issued an order in 2005 extending the coverage of CALEA to two-way interconnected VoIP and broadband Internet access.

The goal of CALEA is to preserve the ability of law enforcement to conduct lawful investigations despite evolutions in network technology. This goal is meant to be achieved while protecting telecommunications subscriber privacy and the ability of telecommunications carriers to launch new services and technologies.

Read more about CALEA.

SARBANES-OXLEY

The Sarbanes-Oxley (SOX) Act requires all financial reports to include an internal control report. This is designed to show that not only are the company’s financial data accurate, but the company has confidence in them because adequate controls are in place to safeguard financial data. Year-end financial reports must contain an assessment of the effectiveness of the internal controls.

Read more about the Sarbanes-Oxley Act and a history of the Act.

Release Notes

Last Modified on 11/22/2019 3:44 pm EST

What's New?

The following articles are either new or recently updated:

- Network & Firewall - INSTALLERS
- Firewall Rules & Time Zone - GENERAL USERS
- Kerauno Available Updates
- Backup/Restore Alerts
- Voicemail Quick Reference Guide
- System Logs
- System Connector
- Administer Ring Group Alerts
- Call Ring Groups
- Parking Lots
- Frequently Asked Questions
- Understanding Ring Weights and Penalties
- Secure File Transfer Protocol (SFTP)
- Using SMS
- SMS Flows
- Managing Permissions
- Active Directory Configuration & Syncing

Release Notes

Release Number	Release Date
Release 3.1.09	12/05/2019
Release 3.1.08	10/15/2019
Release 3.1.07	09/24/2019

Release Number	Release Date
Release 3.1.06	08/27/2019
Release 3.1.05	07/30/2019

Archived Release Notes

Release Notes 3.1.09

Last Modified on 11/22/2019 12:56 pm EST

What's New?

We strive to expand our support options to empower partners with the most modern communication experience. Be sure to review our recently added or updated Knowledge Base articles.

3.1.09 Maintenance Release

NOTE:	Customers can upgrade from 3.1.01 to this maintenance release. Customers still on 2.2.02 or previous versions must first upgrade to 3.1.01 before installing 3.1.09. Please contact support@keraunouc.com with any questions.

Release Date: 11-12-2019 5pm EST

Maintenance Release 3.1.09 includes device certifications, firmware update, and bug fixes. Interruptions to application or voice services are not expected.

General Updates

Certified Phones

The following Mitel phones are now certified: 6867i, 6873i, and 6869i.

Firmware Update

Upgraded the Polycom Soundpoint IP firmware to the updated stable version (4.0.14.1580) for supported models:

IP331	IP650
IP335	IP670
IP450	IP5000

IP550	IP6000
IP560	IP7000

Bug Fixes

General

- Resolved an issue where users were removed from the system after updating their profile photo.
- Fixed a rare issue where a missing log file directory would inhibit the restart of the database from the UI.
- Resolved an issue where an instance would lose SMS, Call Flow toggles via the UI, and transcription functionality due to a failed cloud services key renewal.

Chat+

- Resolved issue with Android Push notifications on Chat+ mobile app.
- Addressed issues encountered regarding password changes for UCaaS and Chat+.
    - When users change their own password, they are correctly logged out of UCaaS and logged out of any Chat+ sessions.
    - When an admin changes a user's password, the user is correctly logged out of their Chat+ sessions.

Reports

- Added a Hold Time column on the Ring Group Summary report.
- The Agent Answered/Disposition field is now included in CSV or PDF exports for the Ring Group Analytics report.
- Scheduled Reports now include the option for either PDF or CSV to be routed via email. When both types are desired, run schedule each report separately.

Bolt (Desktop App)

- Updated Bolt desktop app in accordance with the MacOS requirement for all apps to be notarized. Users must reinstall the latest version in order for Bolt to operate properly.

Integrations

- Fixed an issue where phone numbers saved in Salesforce with a space could not be called using the Kerauno Integration.

Presence

- Additional updates made to DNS and NTP settings to avoid being overwritten during updates.
- Updated Presence session re-authentication to a maximum of 6 retries.
- Increased performance capabilities.

Remote Backup

- Addressed an issue when running a backup on command was not properly gathering data.

Please contact support@keraunouc.com with any questions.

Release Notes 3.1.08

Last Modified on 10/15/2019 9:04 am EDT

What's New?

We strive to expand support options to empower our partners with the most modern communication experience. Be sure to review our [recently added or updated Knowledge Base articles](#).

3.1.08 Maintenance Release

NOTE:	Customers can upgrade from 3.1.01 to this maintenance release. Customers still on 2.2.02 or previous versions must first upgrade to 3.1.01 before installing 3.1.08. Please contact support@keraunouc.com with any questions.

Release Date: 10-17-2019 5pm EST

Maintenance Release 3.1.08 includes license updates, new device certifications, and bug fixes. Interruptions to application or voice services are not expected.

General Updates

Licensing

Added a new Business license type for basic phone system functionality. The number of Business users is defined by your Kerauno UC license. **Note:** This will not affect existing instances. Read more about the Business License type .

Certified Phones

The following Yealink phones are now certified: SIP-T54W, SIP-T53P, SIP-T53W, and DECT IP Phone W60P.

Bug Fixes

Interaction Routing

- Fixed an issue that was causing Queue Alerting to fail.

Call Recordings

- Adjusted recording retention slider; can be set as low as 1. An alert displays when set to less than 3.

Number Manager

- Added an additional alert when a user attempts to delete a number that is still in active use.

Presence

- Fixed a rare issue where calls placed on Local Hold no longer displayed in the UI.

Premise Customers

- Added an ability to add RFC1918 addresses to their firewall.
- Addressed an issue where customers were unable to use the Workflow toggle via the UI.
- DNS and NTP settings are no longer overwritten during updates.

Please contact support@keraunouc.com with any questions.

3.1.08 Business License Type

Last Modified on 10/10/2019 4:02 pm EDT

As part of the 3.1.08 Kerauno update, a Business license type has been added. This license is ideal for partners that require physical or softphone services only, not the Kerauno UI. Business Users cannot log into Kerauno, but have full access to make and receive calls. Existing Kerauno users are now displayed as Full License users.

Note: Chat+, SMS, Fax, and Presence capabilities are not available for this license type.

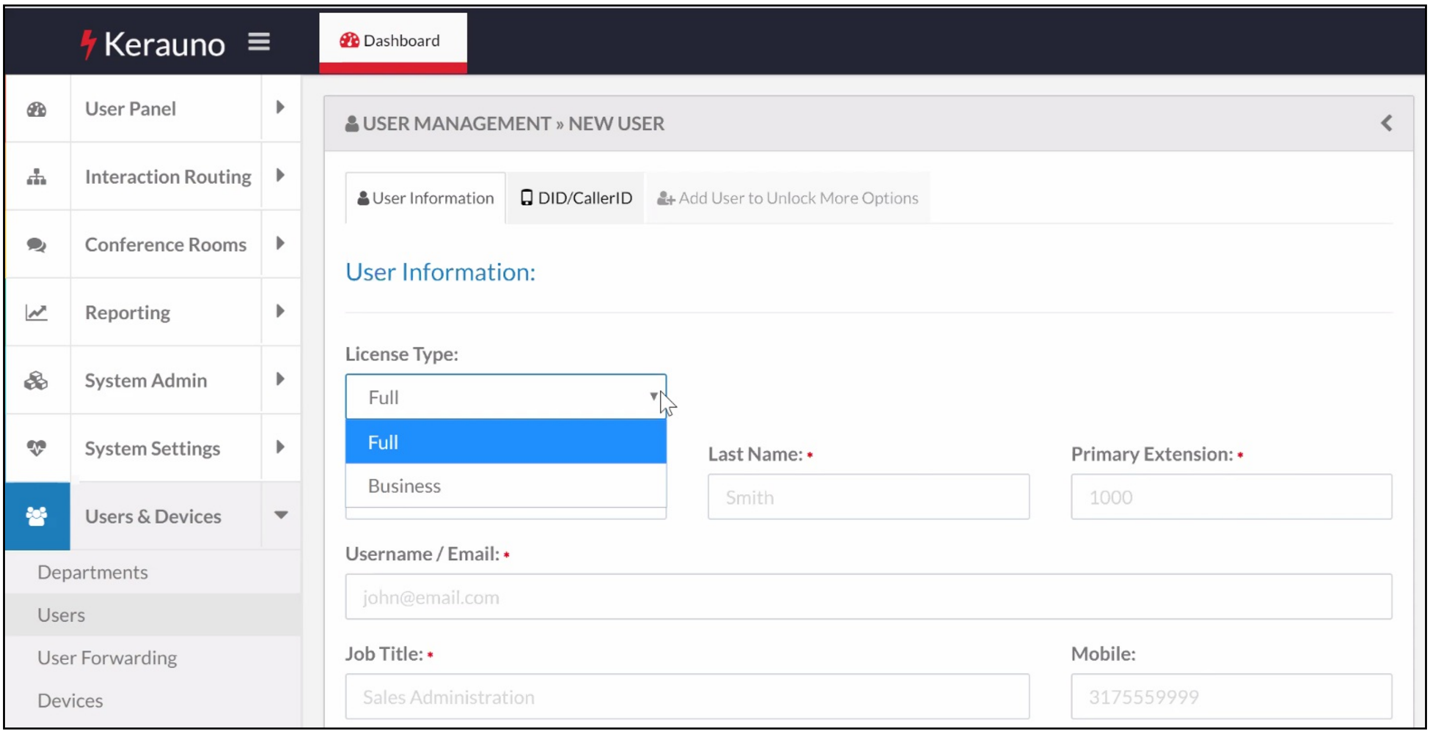
How is Access Administered?

Business License users can be configured by a Kerauno Admin or Installer level user. Administrators provision DID/CallerID, Ring Groups, Voicemail, Voicemail Transcription, and FindMe as needed.

For partners maintaining Business licenses only, an Administrator role is available for an individual to provision access for all users. This role has the same configuration permissions as a Kerauno Installer, but does not require a Kerauno license.

Edit or Add Users

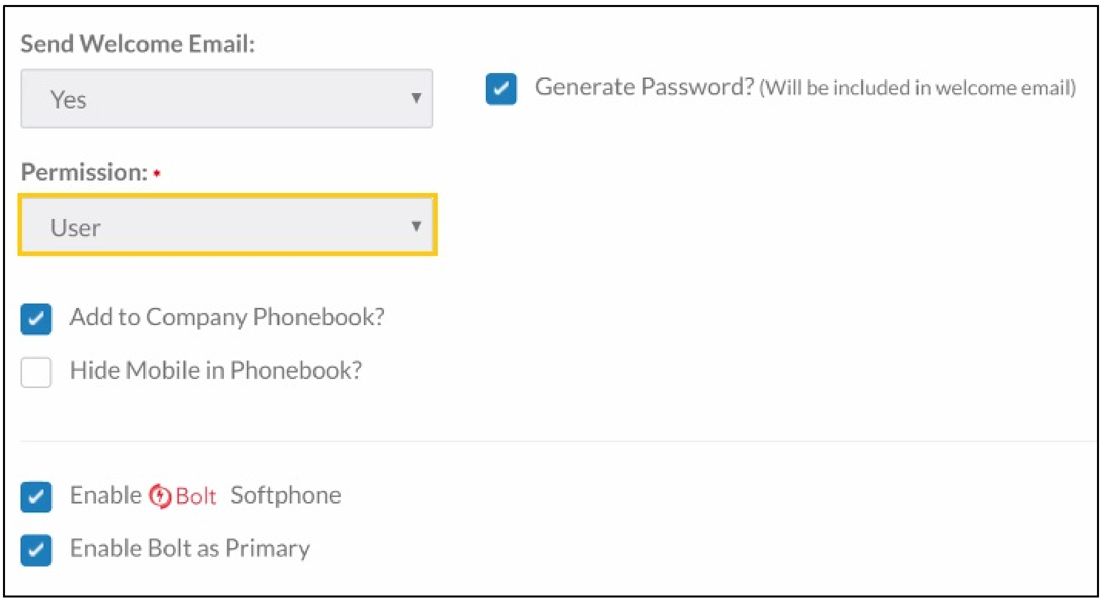
When adding a new or editing an existing user, select the appropriate license type from the drop-down menu:



Note: When Bolt Softphone is added to an existing user, a password reset is required before the user can log into Bolt.

Permissions

When Business License is selected, the Permission drop-down menu is set to User and cannot be modified.



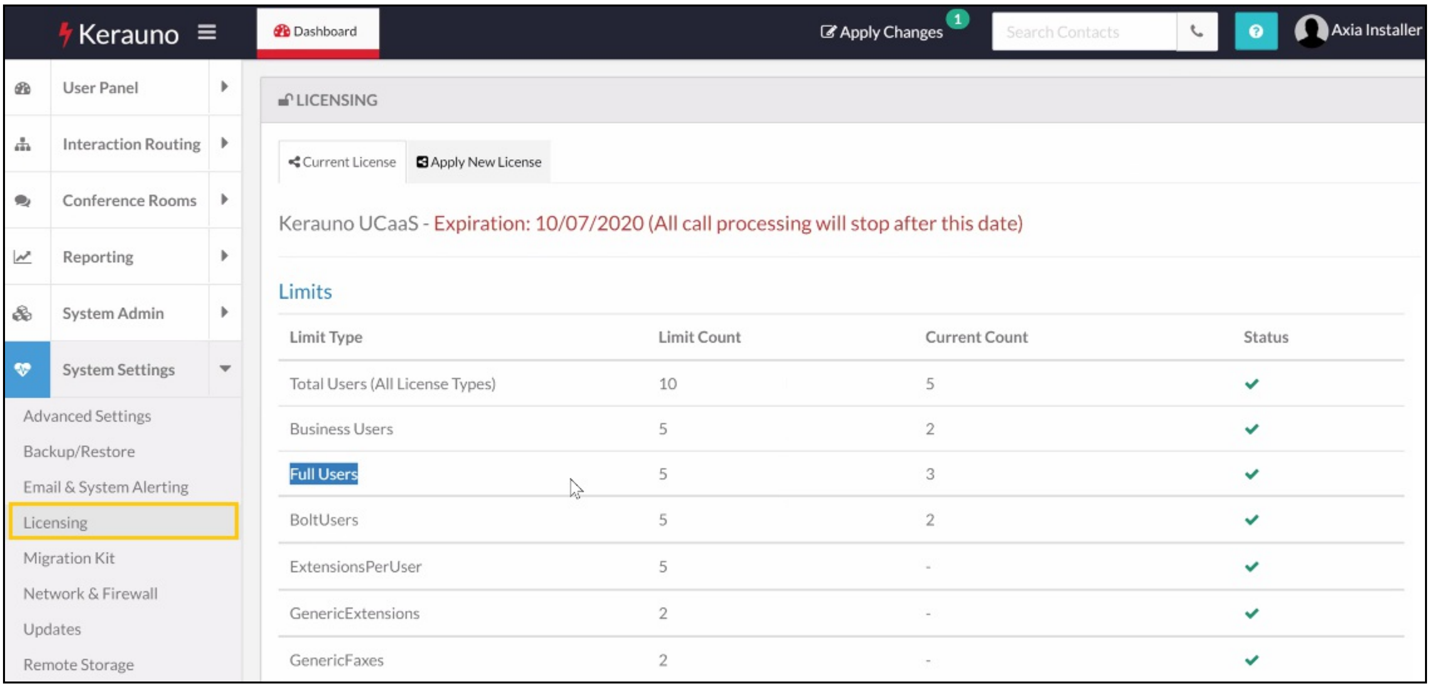
Bulk Import Users

During a Bulk Import, Business or Full are available as license types.

System Settings > Licensing Page

As a result of the new license type, the Licensing menu contains additional data including:

- License total (Full + Business)
- Number of Full licenses
- Number of Business licenses



Release Notes 3.1.07

Last Modified on 10/11/2019 8:51 am EDT

NOTE:	Customers can upgrade from 3.1.01 to this maintenance release. Customers still on 2.2.02 or previous versions must first upgrade to 3.1.01 before installing 3.1.07. Please contact support@keraunouc.com with any questions.

Release Date: 09-17-2019 5pm EST

This maintenance release includes a primary update to Presence. Interruptions to application or voice services are not expected.

Presence Update

Presence has been updated to include additional performance benefits to improve user experience. This update also resolved a rare issue where call center status sync wasn't working as expected.

Please contact support@keraunouc.com with any questions.

Release Notes 3.1.06

Last Modified on 10/07/2019 12:04 pm EDT

NOTE:	Customers can upgrade from 3.1.01 to this maintenance release. Customers still on 2.2.02 or previous versions must first upgrade to 3.1.01 before installing 3.1.06. Please contact support@keraunouc.com with any questions.

Release Date: 08-27-2019 5pm EST

Maintenance Release 3.1.06 includes a new functionality as well as several bug fixes. Interruptions to application or voice services are not expected.

Updated Functionality

- Added additional support for all non-standard email addresses. **Examples:** .info and .global

Bug Fixes

General

- Fixed a rare issue where a user could no longer Apply Changes.

Interaction Routing

- Fixed an issue where parked call announcements were not properly being delivered to users.

- Addressed an issue where agents were shown as Ring Group - Available status when switching from Ring Group - Paused to Available.

Remote Storage

- Resolved an issue in which some cases remote storage and backup storage alert success and failure emails were not sent.

Reporting

- Fixed an issue where Department Manager users could not use the User Search in the CDR Logs.

Please contact support@keraunouc.com with any questions.

Release Notes 3.1.05

Last Modified on 07/30/2019 11:04 am EDT

NOTE:	Customers can upgrade from 3.1.01 to this maintenance release. Customers still on 2.2.02 or previous versions must first upgrade to 3.1.01 before installing 3.1.05. Please contact support@keraunouc.com with any questions.

Release Date: 07-30-2019 5pm EST

Maintenance Release 3.1.05 includes a new functionality as well as several bug fixes. Interruptions to application or voice services are not expected.

Updated Functionality

- Secure File Transfer Protocol (SFTP) is now available in Remote Backup and Remote Storage areas of the product. This feature provides additional security when handling data transmission to offsite storage. This option is ideal for protecting Personally Identifiable Information (PII) as it transmits to 3rd party storage services, and is especially beneficial for clients with strict data security policies, including healthcare organizations or financial institutions.

  Note: An SFTP Server must be established by a Kerauno Admin before enabling this feature. Click here to learn more.

Bug Fixes

On Hold

- Fixed an issue where the wrapup timer was not properly setting when a call was taken off of Hold. This applies only when utilizing Local Hold.

Voicemail

- Addressed an issue where an incorrect error message displayed when deleting a

Voicemail.

Call Recordings

- Addressed an issue where users were unable to download their own recordings.

Please contact support@keraunouc.com with any questions.

Release Notes 3.1.04

Last Modified on 07/22/2019 2:51 pm EDT

NOTE:	Customers can upgrade from 3.1.01 to this maintenance release. Customers still on 2.2.02 or previous versions must first upgrade to 3.1.01 before installing 3.1.04. Please contact support@keraunouc.com with any questions.

Release Date: 07-17-2019 5pm EST

Maintenance Release 3.1.04 provides several updates and bug fixes. Interruptions to application or voice services are not expected.

- Chat+/SMS
  - Fixed an issue where not all Chat+ Channels were displayed when choosing one for a Messaging Group.
  - Addressed an issue where multiple SMS Channels were shown in Chat+ for the same interaction.
- Reporting
  - Addressed an issue where only 1 agent was showing as available in report #3 on a single Ring Group, regardless of true number available.
- Presence
  - Fixed an issue where statuses would sometimes revert to **Available** overnight when Status Sync was enabled.
  - Addressed a rare issue where Presence statuses could change unexpectedly.
- Voicemail
  - Resolved an issue where voicemail greetings incorrectly generated when reset through the Users & Devices menu.
- Caller ID
  - Fixed an issue where Prepended Caller IDs were inaccurate within overflow Ring Groups.
- Extension Groups

  - Fixed an issue where users were unable to add new Extension group(s) in Presence Management.
- Permissions
  - Addressed an issue where Ring Group Call Recording Permissions could not be managed properly, even when **Policy Override** was enabled.
  - Resolved an issue where certain permissions defaulted to **Deny**.
  - Resolved an issue where DNS and NTP settings were overwritten upon updating the system.

Please contact support@keraunouc.com with any questions.

Release Notes 3.1.03

Last Modified on 07/22/2019 2:51 pm EDT

NOTE:	Customers can upgrade from 3.1.01 to this maintenance release. Customers still on 2.2.02 or previous versions must first upgrade to 3.1.01 before installing 3.1.03. Please contact support@keraunouc.com with any questions.

Release Date: 06-27-2019 5pm EST

Maintenance Release 3.1.03 provides several updates and bug fixes. Interruptions to application or voice services are not expected.

Updated Functionality

- Upgraded Presence for general fixes and improved stability.
- Added additional SIP trunk templates.

Bug Fixes

- Presence
  - Fixed an issue where statuses would sometimes revert to Available overnight when Status Sync was enabled.
  - Fixed a rare issue where duplicate calls were displayed in the My Stream Panel.

Please contact support@keraunouc.com with any questions.

Release Notes 3.1.02

Last Modified on 05/02/2019 11:16 am EDT

NOTE:	Customers can upgrade from 3.1.01 to this patch release. Customers still on 2.2.02 or previous versions must first upgrade to 3.1.01 before installing this 3.1.02 patch. Please contact support@keraunouc.com with any questions.

Release Date: 05-07-2019 5pm EST

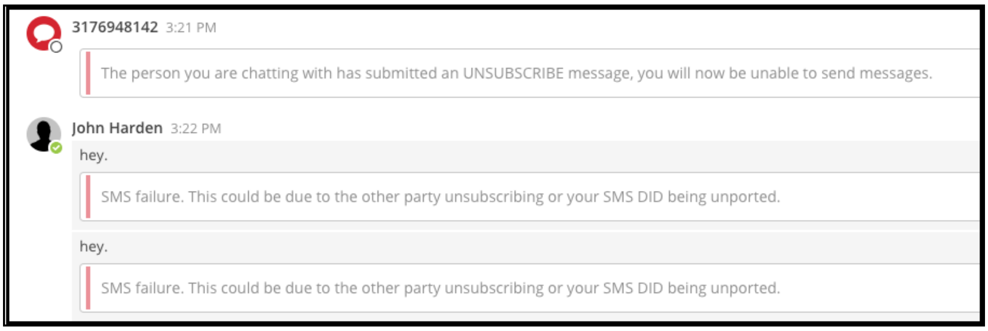
Patch Release 3.1.02 provides several feature updates. Interruptions to application or voice services are not expected.

Updated Functionality

- Call Recordings
  - System Logs have been updated with additional detail when a recording has been removed.
- Reporting
  - Agent Analytics Report now includes individual time stamped line items for all user events:

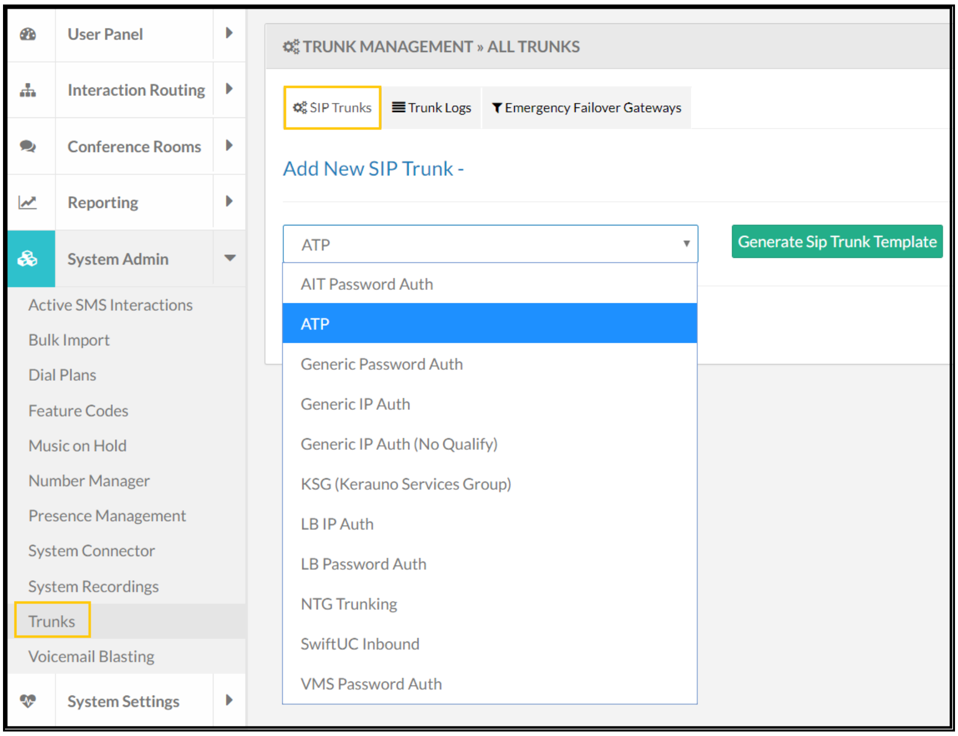
04/19/19	Time Entered Status	Status	Duration in Status
	04/19/19 12:00:00 am:	Available | Available	09:24:37
	04/19/19 09:24:37 am:	Unavailable | In a Meeting	00:00:44
	04/19/19 09:25:21 am:	Unavailable | Ring Group - Paused	01:23:16
	04/19/19 10:48:37 am:	Away | Away	00:00:15
	04/19/19 10:48:52 am:	Away | Some status	00:00:16
	04/19/19 10:49:08 am:	Available | Available	00:00:40

- SMS
  - Alerts have been added when a user unsubscribes to SMS. Message failures also generate an alert:



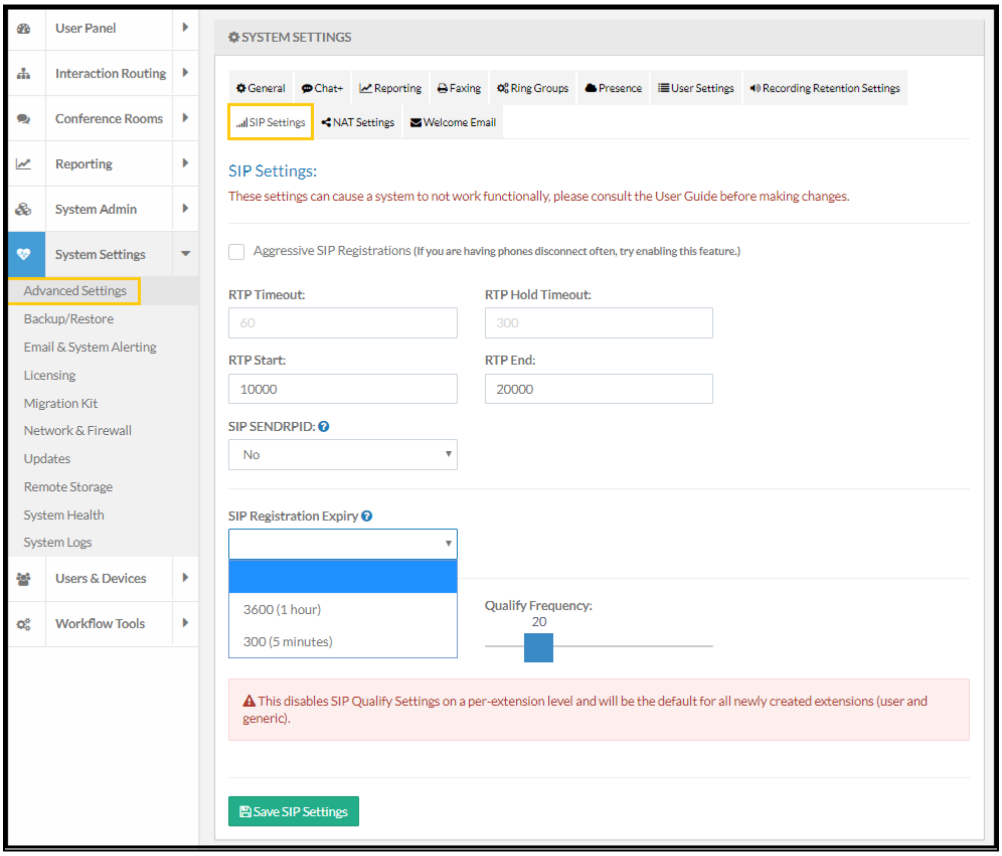
Bug Fixes

- Core Services
    - Resolved an issue where some services were not restarting after an instance reboot.
- System Admin
    - SIP Trunk Templates for Kerauno partners have been renamed for privacy reasons:

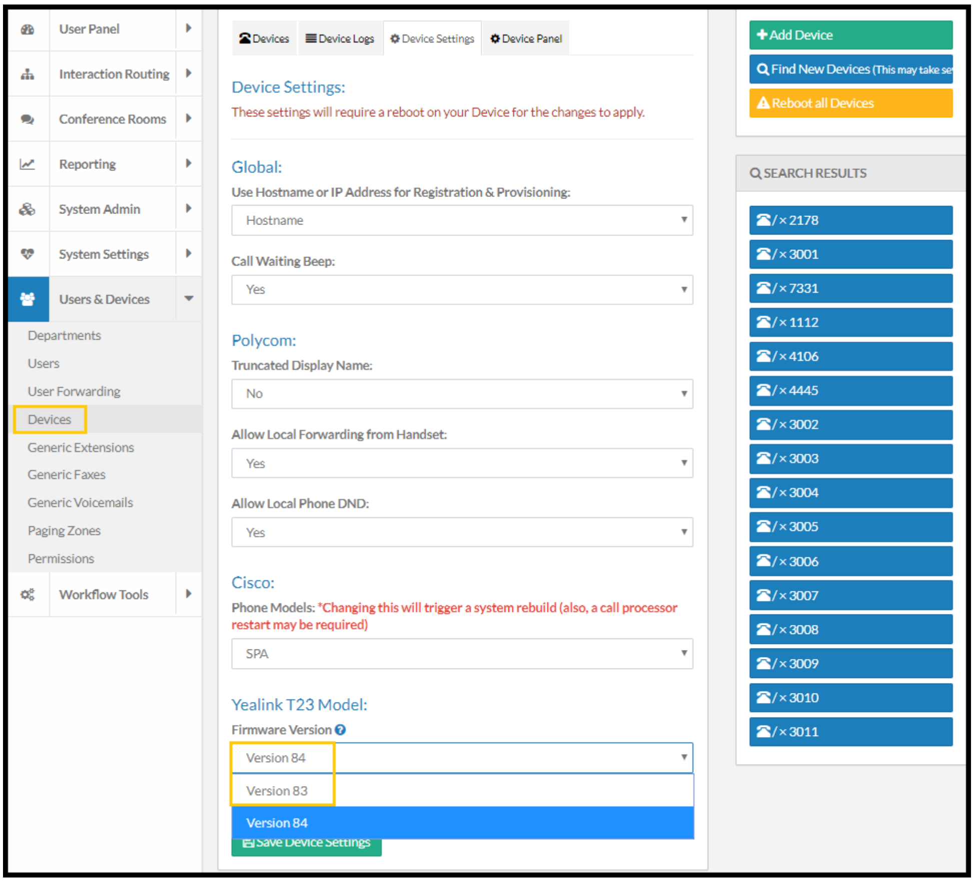


- System Settings
    - Addressed an issue where emails added to Ring Group Alerts within **Email & System Alerting** were not displayed upon page reloads.
    - Two SIP Registration Expiration options (5 minutes and 1 hour) have been added to SIP Settings tab within the **Advanced Settings** menu. When a phone becomes unregistered, Kerauno will attempt to re-register the phone

after the selected timeout:



- Devices
  - Added the option for an Administrator to upgrade the Yealink T23 Model firmware from version 83 to 84 to resolve a known firmware bug:



Please contact support@keraunouc.com with any questions.

Release Notes 3.1.01

Last Modified on 10/01/2019 2:28 pm EDT

NOTE:	All previous major and minor patch releases must be applied before upgrading to 3.1.01. Please contact support@keraunouc.com with any questions.

Release Date: 04-04-2019 5pm EST

Patch Release 3.1.01 includes a user requested feature along with several bug fixes. Interruptions to application or voice services are not expected.

General Improvements

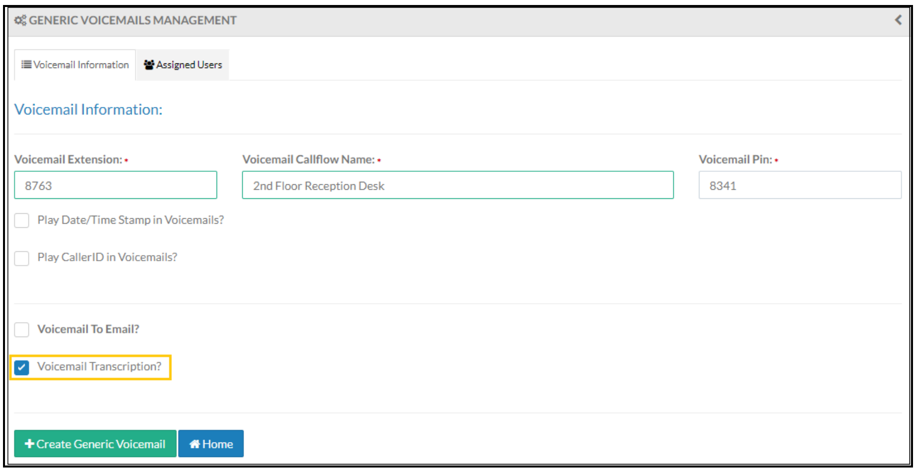
- The Terms of Use (EULA) have been updated with SMS compliance information. Users are prompted to agree to the updated terms upon initial sign in.

New Features

Generic Voicemail

Voicemail Transcription is available for users on 3.1 and higher, excluding premise enterprise customers.

- Added Voicemail Transcription to Generic Voicemail Boxes. **Voicemail Transcription** must be enabled on Users & Devices > Generic Voicemails:



Bug Fixes

Chat+

- Improved styling on web Chat+.
- Addressed an issue where favorited Chat+ Channels and Direct Messages were not properly displayed when switching back from the SMS pane.

Departments

- Corrected an issue where Departments could be improperly assigned the same call pickup ID.

Fax

- Fixed a rare issue where SSL certificates were not applied correctly.
- Addressed an incorrect error message displayed when sending a stored fax file.

Reports

- CDR Logs: Resolved an issue when using a filter reflected incorrect values once exported via PDF.
- Ring Group Analytics: Addressed an issue where the CDR ID column on Report #9 Ring Group Call Details CSV file export was missing.

Please contact support@keraunouc.com with any questions.

Release Notes 3.1.00

Last Modified on 10/01/2019 2:30 pm EDT

NOTE:	All previously released patches must be applied before upgrading to 3.1.00. Those instances currently on 2.2.0 or greater can upgrade directly to 3.0.0. Please contact support@keraunouc.com with any questions.

Release Date: 03-12-2019 5pm EST

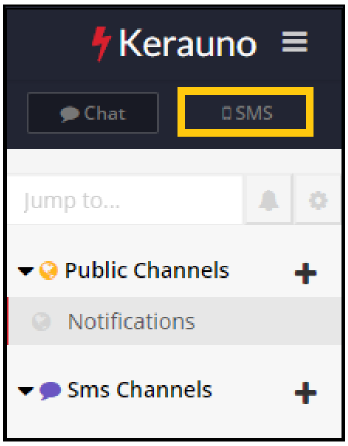
The 3.1 Release represents the next step for our communications platform. We continue to offer our customers the most modern communication experience while expanding the platform's robust capabilities.

This release contains our greatest set of features to date including a full compliment of SMS text messaging capabilities and voicemail transcription. General improvements to usability, new versions of Kerauno's mobile apps, and significant bug fixes all help mark our commitment to empowering our customers through communications.

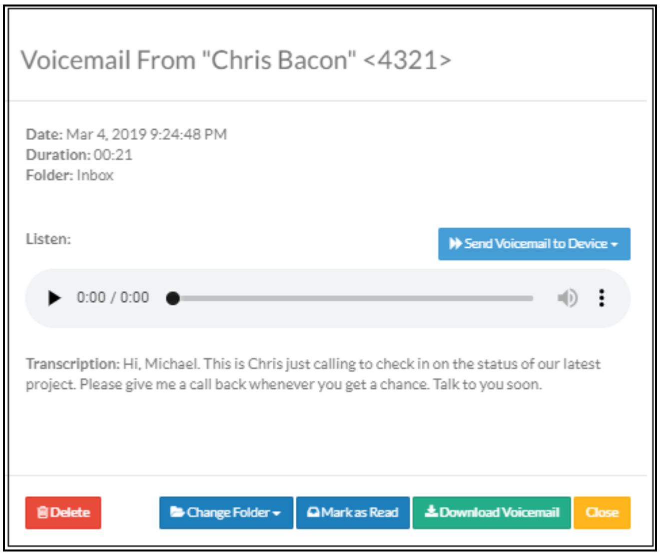
New Features

- **Flows**
  - Added Workflow Inputs to the canvas to allow for dragging of existing Workflow Inputs into Flows.
- **Salesforce for Kerauno Beta**
  - This integration will provide Kerauno users a streamlined experience within their Salesforce CRM.
  - Details regarding the launch will be revealed later this month. Salesforce for Kerauno will go live in the App Exchange after a successful beta program.
- **SMS (Excluding Premise Enterprise customers)**
  - SMS interactions appear on a separate Chat+ tab making it easier to differentiate between internal and external messaging.
  - Users with an SMS enabled DID can now receive and respond to direct SMS messages via Chat+.

- SMS enablement and forwarding have been added to the User Configuration settings via the DID/Caller ID tab.
- Once SMS is enabled, users can access the SMS tab from within Chat+. Read more in our Knowledgebase.



- **Chat+**
  - Improved user experience when using both Chat+ and SMS on non-mobile devices.
- **Voicemail (Excluding Premise Enterprise customers)**
  - Voicemail transcription has been added as a new feature. Read more in our Knowledgebase.

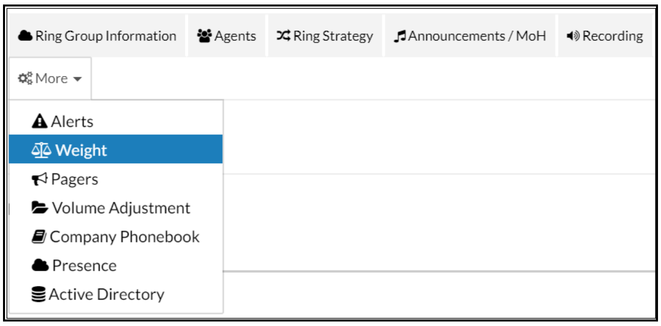


Usability Upgrades

- Windows 10 users can now receive desktop notifications when the Kerauno Desktop Application is out of focus.

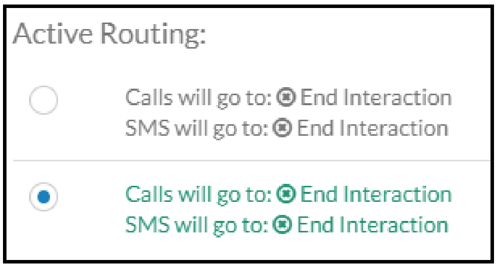
General Improvements

- **Calls**
    - As a reminder, the Calls tab was renamed to Interaction Routing in a previous version.
- **Call Recordings**
    - Updated the minimum recording retention policy from three days to two days or more.
- **Chat+**
    - Removed the ability to delete the general channel.
- **Call Ring Groups**
    - Changed all Ring Group Penalty verbiage to Ring Group Weight. The icon remains the same, only the wording has changed.

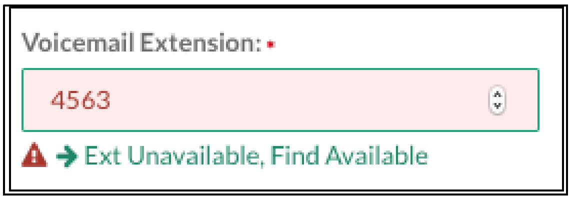


- **Fax**
    - When a fax is in process, the following notification appears "Your fax is being sent."
- **Flows**
    - Updated the Reset Zoom button for clarity and ease of use.

    - Updated workflow functionality when clicking anywhere within a blue transition pillbox. The object is no longer deleted unless the user selects the trash can icon while the item is selected.
    - Updated the modal for Workflow Toggles for clarity and ease of use.



- **Mobile Apps**
  - Updated Google Play Store and iOS Chat+ mobile app with general improvements and SMS. A new version of Bolt with general improvements and security fixes is also available for download. Be sure to download the latest versions.
- **Network Settings**
  - Removed edit access for Administrative and Installer permission groups. Network Settings can still be viewed.
- **Number Manager**
  - Collision detection has been added to all datapoints where a new extension can be created and notifies a Kerauno Installer when an extension is already in use.



Bug Fixes

A total of 43 customer reported bugs were addressed in this release.

- **Alerting**
  - Resolved an issue where queue alerting incorrectly reported that a server hit the concurrent call limit. As a result, numerous emails were sent.
- **Bolt**
  - Addressed an issue where voicemail greetings were unable to be recorded or modified via Bolt.
- **Extensions**
  - Fixed an issue where if Global SIP Qualify Frequency was set on Advanced

Settings, it would not force the value on new extensions.

- **Calls**
  - Fixed an issue where emergency Caller ID override would be set incorrectly on the primary extension when initially creating a user.
- **Call Recordings**
  - Fixed a visual issue in the Recording Source module where the formatting would be incorrect if a username was too long.
  - Fixed an issue where the UI render of the report would not match up with the PDF & CSV render.
- **Chat+**
  - Fixed an issue where you could still create Public Channels when Disable Ability to Create Public Channels is enabled.
- **Devices**
  - Fixed an issue where the Directory would not function properly on Cisco phones.
- **Fax**
  - Added the ability for admins to manage the digit mode faxes go out on (e164 / 11 / 10 digit mode).
  - Fixed an issue where landscape files could not be faxed, saved as a cover page, or stored file.
  - Fixed an issue where resending a fax that had +1 in the destination number would not properly resend.
  - Fixed an issue where a user would get an endless progress bar after clicking the Upload Stored File button without completing the File Name field.
  - Addressed an issue where the user was not notified when attempting to send a fax without selecting a file to send.
- **Flows**
  - Fixed an issue where Global Directory listing was not being populated if the number of users exceeded a certain amount.
  - Fixed an issue where on IE11 exclusively, the **Agent** field would not be shown in the Calls report.
- **Kerauno Desktop App**

- The **View PDF** button in the Fax module for the desktop application has been removed. Faxes can still be downloaded as a PDF. This change is only active after a user downloads the new version of the desktop app.

- **Parking Lots**
  - Fixed a rare issue where calls transferred to a parking lot played the incorrect parking spot extension.
- **Permissions**
  - Fixed a rare issue where blank permissions could show up in the list of permissions.
- **Phonebook**
  - Fixed an issue where users would still show in Click To Dial after being removed from the company phonebook.
  - Fixed an issue where Departments would not properly sort within the User Panel > Phonebook module.
  - Fixed an issue where some users would not be displayed in the Department PDF.
- **Presence**
  - Fixed an issue where multiple users would be added to Presence when Bolt was enabled in the User add screen.
  - Fixed an issue where using Presence to answer ring group calls after putting them on hold now would not respect wrap up time.
- **Reports**
  - Fixed an issue where a report ran on Time In Status for more than a single day would show incorrect data.
- **Ring Groups**
  - Fixed an issue where the Join When Empty setting on a Ring Group would be set to NO when a new user was added to that Ring Group via the Users module.
- **System Settings**
  - Fixed an issue on the Recording Retention tab that was causing recordings to be available longer than the system administrator setting.

    - Fixed a rare issue where HTTPS would not work on hosted instances.
- **Security**
    - Eliminated security vulnerabilities.
- **Users**
    - Addressed a bug that was causing a newly added user to a department to error out when attempting to modify the username.
    - Bulk Welcome Emails now send the correct Bolt information.
- **Wallboards**
    - Fixed an issue where usernames were incorrectly being displayed.
- **Voicemail**
    - Addressed a bug that caused incoming calls to a DID to terminate instead of route to Voicemail for newly synced users.
    - Fixed an issue where voicemails would not play in the Apple Mail client.
    - Removed Press # for additional options prompt in the voicemail recording as that key press did not give additional options.
    - Fixed an issue where if a user deleted a voicemail, it would incorrectly toggle all voicemails.

Please contact support@keraunouc.com with any questions.

Release Notes 3.0.01

Last Modified on 08/16/2019 10:11 am EDT

NOTE:	Customers can upgrade from 3.0.0 to this patch release. Customers still on 2.2.02 or previous versions must first upgrade to 3.0.0 before installing this 3.0.01 patch. Please contact support@keraunouc.com with any questions.

Release Date: 01-23-2019 5pm EST

Patch Release 3.0.01 is a Priority Release that provides increased system performance and general usability enhancements. Interruptions to application or voice services are not expected.

Performance Improvements:

- System resource usage optimization
- Presence engine reliability
- Faster runtime processing for long-term historical reporting

Usability Upgrades:

- Redesigned system-generated emails
- New data visualization graphs for specific standard reports

Updated Functionality

- General
  - To improve standardization across all applications, *Kerauno Server* has been replaced with *Kerauno Domain* in the Chat+ app domain entry screen.
- Backup/Restore
  - To provide better clarification on version backup files, two safeguards have been added:
    - Version information appears in filename generated for each backup.
      - New format: kerauno-backup-20181016201005-

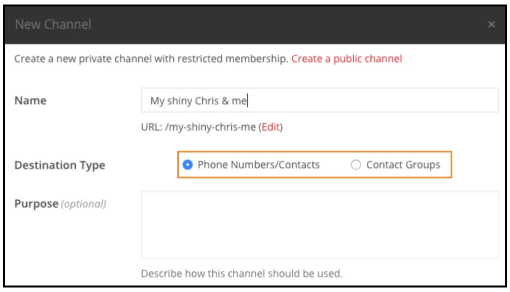
            version2.2.02.tar.gz.en
            - Previous format: kerauno-backup-20181016201005.tar.gz.en
        - A warning message now displays prior to a restore clarifying the following: *"The version of this restore file must be the same as the version of this Kerauno instance for the restore to be successful. Restores across different versions are currently not supported."*
- Bolt
    - The Desktop Application has been updated to accurately reflect MacOSx in the footer.
- Chat+
    - The DND button now displays red when activated.
    - The ability to delete the general channel has been removed.
- Reporting
    - Agent Analytics data displayed on these two reports previously formatted by decimal point has been updated to appear in a bar graph with Length of Time shown on the Y-axis.
        - Affected Reports: Average Talk Time & Total Talk Time Per Hour
    - The automated emails for reporting and alerts have been updated for style and clarification.
- Users
    - Usernames are now validated to avoid confusion. Duplicate prefixed are prohibited.
        - Example: John@123.com and John@123.org.
        - Add additional identifying information to differentiate usernames. Example: JohnAdams@123.com and JohnBrown@123.org.
- SMS
    - To avoid future orphaned SMS channels that cannot be retrieved or have a new SMS number added to it, users are now prompted to **Delete Channel** instead of selecting **Leave Channel**.

Bug Fixes

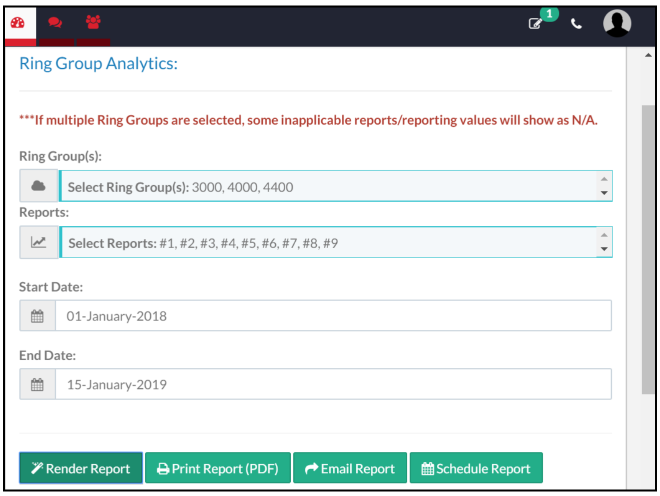
- Call Flow

- Addressed an issue that prevented a holiday filter to appear correctly in the workflow.

- Chat+
  - Using the @ symbol in a channel no longer retrieves SMS numbers and now reflects only usernames.
  - The **New Channel** creation screen now accurately displays SMS radio buttons as shown below:



- Fax
  - Addressed an issue where fax retries were not handled correctly. If a fax does not go through successfully on the first try, the system will make up to 5 additional attempts.
- Presence
  - Users with Bolt extensions no longer display multiple times in the **Users Widget**.
- Ring Group Analytics
  - When multiple Ring Groups are selected, **N/A** will show for Agents Available instead of displaying **1.**



- Auto Pausing

    - The Auto Pause functionality automatically set to **Yes** for Department Ring Groups has been updated to **No** for newly created Ring Groups. Autopausing is a specialty use-case functionality and should be off for all Ring Groups as well as Departments by default.
- Administration
    - System Health-Fixed an issue where the database server appeared to be down after restarting, when it was actually functioning properly.
- Users & Devices
    - When adding a user to a previously assigned extension in the **Extensions Tab**, the new user does not inherit the deleted user's call history.
- Wallboards
    - A rare issue where links generated for Premise instances were inoperable has been corrected.
- Integrations
    - Zoom
        - Addressed a bug where Zoom was available after the license had been disable. Zoom integration is turned off as soon as the license is removed for the entire instance.

Please contact support@keraunouc.com with any questions.

Release Notes 3.0.0

Last Modified on 02/18/2019 9:26 am EST

Important Notes:

- **Upgrade Process**
  - The 3.0 upgrade is larger than normal by about 6x (280MB). This may impact the time it takes to complete a system upgrade depending on the internet connection to each instance.
  - Those instances currently on 2.2.0 or greater can upgrade directly to 3.0.0. Instances older than 2.2.0 will be required to upgrade incrementally to 2.2.0 first.
- **New Web Address**
  - In February 2019 the URL for the application will change from "*keraunuc.com*" to "*kerauno.io*".

New Functionality

- **Phonebook import for Bolt**
  - Users who have the Bolt softphone enabled can now quickly download the latest phonebook from the "Download Bolt Directory" tab and upload it to their Bolt softphone. This allows users to search and find contacts extensions while using Bolt more easily.
- **Video Conferencing Integration**
  - Kerauno customers using Zoom for Business can now configure an integration that quickly launches meetings from within Chat+.
- **Call Flow**
  - To reduce the likelihood of unintentional changes being made to existing call flows, user must now toggle on and off the read-only view if they intend to make a change.
- **Support Ticketing**
  - Customers who are services by Kerauno can now designated users to submit support tickets directly through the platform when enabled on the

license. This new option is located under the help icon in the header of the application.

- **Click to Dial and Bolt Auto Answer**
  - Users can now toggle the Bolt answering behavior from the user profile setting located on the dashboard. This is for users who want to remove the need to click answer after using click to dial via the phonebook.
- **Chat+ SMS Utilization Reports**
  - SMS activity in Chat+ can now be reported on. Find out how often the services is being used and who is being contacted across the account.
- **User Assistance (Help)**
  - Updated the change log link to now direct the user to the Kerauno Knowledge Base

Features Removed

- Legacy Wallboards were rebuilt in version 2.2.04 and in 3.0.0 they are no longer able to be referenced.
- In application chat was removed from the Bolt softphone.

Improvements

- **Desktop Applications**
  - The Windows and Mac desktop applications have been improved and repackaged to support copy/paste from the clipboard, keyboard navigation for things like refresh, and better overall performance. **Click here** for instructions on installing the latest desktop app.
- **General User Experience**
  - Added the ability for agents to pause themselves in Presence when Call Center Status sync is off.
  - The global navigation was simplified and and improved to better meet user expectations.
  - The count of unread Chat+ messages are now shown in the browser tab or title of the page.

- Improved support for using browser back arrows.
- Contact Search now responds to keyboard arrow navigation and disappears when navigating to other areas of the application.
- Pagination for several panels was improved.
- Within Downline Reports, Average Talk Time graph will now have a time value as the Y-Axis instead of a decimal.
- Chat+ channel groupings and navigation now expand and collapse in an accordion style giving the user quicker visibility to key channels they use.
- Chat+ channel type icons were updated to add clarity of their function.
- The icon to add a channel to Chat+ was updated to a "+" to meet user expectations.
- Loading bars were added to more locations in the application to indicate to the user that a resource was in the process of loading.
- Wallboard descriptions have been updated to add more clarity of what they are representing.
- The sent status indicators for SMS was improved and made more standard with other Chat+ behaviors.
- Present only the 'Download Mobile Apps' button on the User Panel when browsing on a mobile device.

Bug Fixes

- **Chat+**
  - The message count in the top navigation bar will no longer show negative numbers.
- **Dial Plan**
  - Fixed an issue where the number select input control was not displaying the proper information.
- **Presence**
  - Fixed a visual issue where the icons in the Users tiles would flash rapidly while the system was applying changes.
  - Resolved an issue with Extension Groups that would occur when adding too

many members to the groups at once and cause all members to be removed.
    - Fixed an issue where pause permissions would be reverted on a rebuild of the system.
- **Click to Dial**
    - Fixed an issue where using click to dial to call a user with multiple extensions would only ring for 2 seconds.
    - Fixed a rare issue where click to dial was not consistently ringing all extensions properly.
- **Call Flow**
    - Join When Empty setting for Ring Group has been fixed and now allows additions.
    - Fixed an issue where deleting condition configurations for existing workflow conditions could cause the call flow tool to not render properly.
- **Call Detail Records (CDRs)**
    - Fixed a rare issue where CDRs would not record properly on a new install.
- **Reporting**
    - Improved the reliability of loading all reports for Ring Group Analytics.
    - Fixed a rare issue where the Downline Report would show calls not started by the User.
    - Fixed a rare occurrence of a missing abandon call in ring group call details.
    - Fixed an issue where the Agent Summary report could have discrepancies between the UI Report and the PDF Report.
    - Average in Calls Per Hour By Ring Group By Day will now show the accurate average instead of 0.0.
- **Wallboards**
    - Fixed Ring Groups to properly displayed when an agent logged in.
    - Fixed an issue where the "Answered" field count would increase incorrectly on reload of the wallboard.
    - Fixed Calls Waiting intermittently displaying the wrong number as well as displaying the wrong number on load.
    - Fixed issue where CPH and Abandon counts would be inconsistent between

global and single wallboards.

- **Music On Hold**
  - Fixed an issue where one of the music files being played was not displayed in the Kerauno UI.
- **On Premise Instances**
  - The issue not allowing the enablement of HTTPS is resolved.
- **Active Directory**
  - Fixed an issue where the setup configuration would not function properly and therefore, the remote backup copy could not get transferred to the dual server.
- **Find Me**
  - Fixed an issue where users would be unable to add additional numbers in the Find Me panel.
- **Users & Devices**
  - Resolved an issue where users with override trunks set would not have that override honored.
- **System Logs**
  - Made the scheduled update time show consistently from the schedule window and the change log. The change log was showing system time rather than the time in the account settings.

Release Notes 2.2.02

Last Modified on 08/16/2019 10:12 am EDT

Release Date: 10/01/2018

Release 2.2.02 centers around Wallboard functionality and also includes updates and bug fixes for User Interface, SMS Beta, Wallboards, Bulk Importer, Call Analytics, CDR Logs, Presence, Remote Storage, Reporting, and System Health. Please refer to categories below for details.

Updated Functionality

- In-Call Analytics
    - Added the ability to set the retention period of In-Call Analytics data in System Settings.
    - Improved the speed of loading In-Call Analytics.
- SMS Beta
    - Changed the header for creating a new SMS channel for clarity.
- UI
    - Improved minor UI and grammatical errors.
- Wallboards
    - Significantly improved performance for rotating wallboards.

Bug Fixes

- Bulk Importer
    - Fixed an issue where an error would incorrectly occur during Bulk Import of Users if a user's outbound caller ID was already in use.
- Call Analytics
    - Fixed a rare issue where an In-Call Analytics report would not load.
- CDR Logs
    - Fixed a rare issue where a 6 digit number would show up as the Destination in a CDR Log.
- Generic Extensions
    - Fixed an issue where Generic Extensions were not being saved properly.

- In-Call Analytics
  - Fixed a rare issue where an In-Call Analytics report would not load.
- Number Validator
  - Fixed an issue with To Number Validator on SMS modal when Contact Groups were enabled.
- Presence
  - Fixed an issue where logging in would sometimes prompt with an error when Kerauno Presence was under pressure from a heavy load.
- Remote Storage
  - Fixed an issue where the File Prefix would be added to the file name multiple times.
- Reporting
  - Fixed an issue where the output for Print PDF and Export CSV for Reporting > Ring Group Analytics would not include all the information included in the output for Render Report.
- SMS Beta
  - Fixed an issue where the first character of a message sent from a contact group was not being sent.
- System Health
  - Fixed an issue where the System Health page would display incorrect values.
  - Fixed an issue where the System Health module was not able to restart services.
- Wallboards
  - Fixed an issue that caused the number of agents logged in to incorrect with how many agents are being displayed as logged in.
  - Fixed an issue where if the connection to the backend socket was lost you would reconnect but no longer receive data, as if you were disconnected.
  - Fixed an issue that caused the number of agents logged in to incorrectly display how many agents are as logged in.
  - Fixed an issue where the wallboard links would not display the hostname

properly.

- Fixed an issue where the number of calls waiting would stop decreasing properly.
- Fixed an issue where minimum hold times would incorrectly display 0.
- Fixed a rare issue where the worst ring group would display incorrect data.
- Fixed a rare issue where the ring group displayed as the worst ring group would be incorrect.
- Fixed an issue where the progress bar did not properly indicate the progress of the rotation.

Release Notes 2.2.01

Last Modified on 03/05/2019 3:55 pm EST

Release Date: 09/10/2018

Please be aware that 2.2.01 is a patch release to address some issues introduced in the 2.2 release.

New Functionality

- **Bulk Import**
  - Added functionality that sets Bolt as the primary device when Bolt is enabled for a User imported using Bulk Importer.
- **Presence**
  - Added all workflow tagging and components as variables (cannot contain underscore) in the Presence Screen Pop functionality.

Bug Fixes

- **Wallboards**
  - Fixed a rare issue where Calls Waiting on Wallboards would appear to be a negative number.
  - Fixed an issue where Wallboards would sometimes require a manual refresh.
  - Fixed an issue where Wallboards would not function properly on HTTP
  - Fixed an issue where Wallboards would have inaccurate data due to breakout calls being displayed as answered calls.
  - Fixed an issue where there were inconsistencies in the new and legacy wallboard data.
- **Devices**
  - Fixed configuration file for yealink model phones to point to the proper ntp server.
  - Fixed an issue where some Yealink models would connect to the NTP server too frequently causing the time shown to not be correct.
- **Presence**
  - Fixed an issue where some users would sometimes appear as if they were logged into a single ring group multiple times.

- **System Health**
  - Fixed an issue where the System Health module was not able to restart services.
- **Backup and Restore**
  - Fixed an issue where after a restore, the database was inaccessible.
- **Network and Firewall**
  - Fixed a rare issue where the server time would not match the actual time.
- **Chat+**
  - Fixed an issue where the unread Chat+ messages badge on the navigation tab would not always be accurate.
- **UI**
  - Fixed an issue where the Help icon was disabled for Chat+ and Presence modules.
- **Alerting**
  - Fixed an issue where the backup and restore procedure would show "Running" when files had already been uploaded.
- **Remote Storage**
  - Fixed an error where Configurable Queue Alerting would sometimes not function properly.
- **Ring Groups/Ring Group Analytics**
  - Fixed an issue where the Join When Empty setting would not function properly.
  - Fixed an issue where breakouts were not logging properly in the Ring Group Summary report.
- **Reporting**
  - Fixed an issue where PDF and CSV exports would not always show data.
- **Users**
  - Fixed an issue where Recording settings within Modify User were not correctly displaying.
- **SMS (Beta)**
  - Fixed an issue where the first character of a message sent from a contact group was not being sent.

Release Notes 2.2.00

Last Modified on 03/05/2019 3:56 pm EST

Release Notice August 29, 2018

You can now upgrade to the most current version of Kerauno without a sequential upgrade.

Client Care and the Engineering Teams are aware of the customers who have upgraded to Version 2.2.0 and are actively working to resolve those issues directly with the customers.

These updates will be bundled into a patch release Version 2.2.01, currently slated for this Tuesday, September 4.

If you have already upgraded to Version 2.2.0 and have any questions related to your service, please contact Customer Care.

New Features

- **Chat+ and SMS**
  - [BETA] Kerauno now supports SMS! Users can interact with contacts via SMS by using Chat+ and creating an SMS channel.
  - Added the "/giphy" command in Chat+.
  - Added unread badge indicator for Chat+ on the navigation bar in the User Interface.
- **Dial Plans**
  - Added functionality to add randomized pins to Near Domestic and International Dial Plans at the end of system installation.
- **Users**
  - Added the ability to include Bolt Username and Bolt Password in the Welcome Email.
- **Devices**
  - Updated firmware on Yealink T42S, T46S, and T48S models.

Updated Functionality

- **Wallboards**
  - Greatly improved performance and stability
    - **Note**: The new **Wallboards** do not yet support HTTP. They are designed to work with HTTPS. If you are not able to reference the HTTPS link, you can reference the old Wallboards as a work around. And, there is also a new URL for the Wallboards. Be sure to update the URL to receive the updated Wallboards.
- **Backup and Restore**
  - Improved verbiage on Restore Backup prompt for clarity.
  - Improved efficiency by decreasing the size of the backup file.
- **Licensing**
  - Added the ability to see License Limits in the User, Generic Faxes, Generic Voicemail, Generic Extensions, Parking Lots, and Ring Group modules for ease of use.
- **Call Flow**
  - Updated Default Inbound Call Flow verbiage for clarity and consistency.
  - Updated Call Flow verbiage throughout the UI for consistency.
- **Workflow Tools**
  - Updated the title on the VPN Configuration module for consistency.
- **Bolt**
  - Updated codec signaling to improve call quality.
- **Users**
  - Separated the "change username" functionality into its own section to avoid conflicts with changing other aspects of a user.
- **Devices**
  - Updated configuration for Polycom models to decrease spam calls that do not hit the system's firewall.
- **Faxing**
  - Updated the faxing system to improve stability and reliability when sending faxes.
- **Reporting**
  - Added total talk time to the PDF output of downline reports to provide more comprehensive

information.

- **General**
  - Updated the styling/theme for Chat+ to be more consistent with Kerauno style/theme.
- **Security**
  - Added some security updates to the Update process.
  - Made security improvements in the back end of the system.
  - Improved the process to obtain and renew an SSL cert for Hosted environments for customer convenience.
  - Added security improvements to AutoExec that will only allow traffic from whitelisted IPs in the Firewall.
- **Logging**
  - Increased verbosity for logging of automatic functions for quicker processing.
- **Network and Firewall**
  - Removed required asterisk on Secondary Interface Settings in Firewall Management module for clarity.

Bug Fixes

- **Devices**
  - Fixed an issue where not all feature codes were working as intended on Cisco SPA504G models.
  - Fixed an issue where Generic Extensions would not register properly to Yealink CP860 models.
- **Reporting**
  - Fixed a rare issue where CDRs would stop recording after a reboot.
  - Fixed an issue where the CDR reports for all users would appear in the export and PDF despite only a single user being selected.
  - Fixed an issue where records would not be visible in the Abandoned Calls tab of the Ring Group Call Details report to ensure all appropriate records are visible.
- **Dial Plans**
  - Fixed an issue where subnet routing for emergency calls was not working properly.
- **Ring Groups**
  - Fixed an issue where the incorrect tool tip was being displayed for Agent Announcement in the

Ring Group module.

- **User Panel**
    - Fixed an issue where graphs within the user panel would sometimes load incorrectly; graphs now load as intended.
- **Users**
    - Fixed an issue where the Fax-to-Email setting would not persist when enabled during user creation.
    - Fixed an issue that incorrectly enabled Bolt Softphone as Primary Device on user creation when Bolt was enabled but Bolt Softphone as Primary Device was unselected.
- **Trunk Analytics**
    - Fixed an issue with the Trunk Analytic Number Frequency Report where total talk times would be incorrect; total talk times now display as intended.
- **Bolt**
    - Fixed an issue where Bolt users could not be created on new ISOs.
- **Calls**
    - Fixed a rare issue where CDRs would not work on a new ISO.
- **In-Call Analytics**
    - Fixed an issue where downloading a recording was unavailable for calls that were initiated with click-to-dial.
- **API**
    - Fixed an issue where the API would be inaccessible.
- **Interface Routing**
    - Fixed an issue where Interface Routing rules would not account for different interface names in Premise instances.
- **Presence**
    - Fixed visibility issues when the Presence tab was collapsed for more than 30 seconds.
    - Fixed an issue where Call Recordings would remain within Presence after an extension was deleted for audit purposes.
    - Fixed an issue where an icon was missing in the custom agent status of the Presence module.
- **Presence/Workflow Forms**
    - Fixed an issue where an incorrect notification of submission of a Workflow Form would be

displayed after a new call was initiated.

Release Notes 2.1.04

Last Modified on 03/05/2019 3:56 pm EST

Release Date: 07/11/2018

New Functionality

- **Dial Plans**
  - **Added functionality to add randomized PINs to Near Domestic and International Dial Plans at the end of system installation.**
- **Users**
  - **Added the ability to include Bolt Username and Bolt Password in the Welcome eMail.**
- **Devices**
  - **Updated firmware on Yealink T425, T465, and T485 models.**

Updated Functionality

- **Back-up and Restore**
  - Improved verbiage on Restore Backup prompt for clarity.
  - Improved efficiency by decreasing the size of the backup file.
- **Licensing**
  - Added the ability to see License Limits in the User, Generic Faxes, Generic Voicemail, Generic Extensions, Parking Lots, and Ring Group modules. (for administrators)
- **Auto Exec**
  - Added security improvements to Auto Exec that will only allow traffice from whitelisted IPs in the Firewall.
- **Chat+**
  - Updated the styling/theme for Chat+ to be more consistent with the other areas of Kerauno.
- **Users**
  - Separated the change username funtionality into its own section to avoid conflicts with changing other aspects of a user.
- **Network & Firewall**
  - Removed "required" asterisk on Secondary Interface Settings in Firewall Management module for

clarity.

- **Bolt**
  - Updated audio codec signaling to improve call quality.
- **Devices**
  - Updated configuration for Polycom models to decrease spam calls that do not hit the system's firewall.
- **Faxing**
  - Updated the faxing system to improve stability and reliability when sending faxes.
- **Reporting**
  - Added total talk time to the PDF output of downline reports.

Bug Fixes

- **API**
  - So partners can monitor and track Kerauno via the API the PostAPI now allows Kerauno to send a stream of events to a configurable URL. These events now mirror whatever events are selected within the configurable Kerauno API -> POST API menu. Configurable options include Call Start, Call End, Transfer, Park.
- **Devices**
  - Fixed an issued where not all feature codes were working as intended on Cisco SPA504G models.
  - Fixed an issue where Generic Extensions would not register properly to Yealink CP860 models.
- **Reporting**
  - Fixed an issue where the CDR reports for all users would appear in the export and PDF despite only a single user being selected.
  - Fixed an issue with the Trunk Analytic Number Frequency Report where total talk times would be incorrect.
  - Fixed an issue where records would not be visible in the Abandoned Calls tab of the Ring Group Call Details report.
- **Presence**
  - Fixed an issue where Call Recordings would remain within Presence after an extension was deleted.

- Fixed an issue where an icon was missing in the custom agent status of the Presence module.
- Fixed visibility issues when the Presence tab was collapsed for more than 30 seconds.

- **Dial Plans**
  - Fixed an issue where subnet routing for emergency calls was not working properly. (In what instance was it not functioning correctly? or was it completely broken?)
- **Ring Groups**
  - Fixed an issue where the incorrect tool tip was being displayed for Agent Announcement in the Ring Group module.
- **User Panel**
  - Fixed an issue where graphs within the user panel would sometimes load incorrectly.
- **Users**
  - Fixed an issue where the Fax to eMail setting would not persist when enabled during user creation.
  - Fixed an issue that incorrectly enabled Bolt Softphone as the Primary Device on user creation when Bolt was enabled but Bolt Softphone as Primary Device was unselected.
- **In-Call Analytics**
  - Fixed an issue where downloading a recording was unavailable for calls that were initiated with click-to-dial.
- **Workflow Forms**
  - Fixed an issue where an incorrect notification of submission of a Workflow Form would be displayed after a new call was initiated.
- **Interface Routing**
  - Fixed an issue where Interface Routing rules would not account for different interface names in Premise instances.

Release Notes 2.1.03

Last Modified on 03/05/2019 3:56 pm EST

NOTE:	2.1.03 is a special patch release that is intended to better align all customers with a consistent code base. This release is required to continue adopting new functionality. Going forward, Kerauno will consolidate releases to be more cohesive and function based. Thank you for your understanding. Customers can upgrade from 2.1.01 or 2.1.02 to this version.

New Functionality

- Added the ability to simulate a local phone hold when putting a call on hold through the Presence module.

Bug Fixes

- System Logs
  - Fixed an issue where the log for when an update was applied was not accurate
- Reporting
  - Fixed an issue where the Total Talk Time column was missing from Downline Stats by User within the Downline Report PDF.
- System Connectors
  - Fixed an issue where System Connectors were unable to be deleted from the user interface.

Release Notes 2.1.02

Last Modified on 03/05/2019 3:56 pm EST

NOTE:	There was a prior version of 2.1.02 available for download prior to June 12. That version is being invalidated and removed as an option to upgrade. The new 2.1.03 Release is the patch that includes additional Presence enhancements and a couple reporting bugs. For customers who installed 2.1.02 the upgrade to 2.1.03 will patch the additional features. For customers who had not updated and are still on 2.1.01, the upgrade to 2.1.03 will work and bring your environments up to the latest tested version without having to upgrade 2.1.02. Going forward, Kerauno will consolidate releases to be more cohesive and function-based. Thank you for your understanding.

New Functionality

- Added analytics for conference calls created in the Presence module to provide more call information.
- New fully certified handsets (Yealink CP960 and Zultys ZIP 35i).

Updated Functionality

- Alerts
  - Updated the email template verbiage to include name of ring group.
  - Improved formatting in the ring group alert emails for clarity and consistency.
- Performance
  - Optimized the speed of loading the numbers within the number selector.
  - Improved the speed of loading requests throughout the system.
- Reporting

    - Updated the Reporting Tool emailing system for consistency with other emails sent out by the system.
- Trunk Configuration
    - Admins can now force a default trunk on all numbers in Number Manager.
    - When the first trunk is added to a server a prompt is displayed allowing users to set that trunk as primary on all dial plans.
- Workflow Form
    - Enabled ability to display data automatically in Workflow Forms paragraph field for ease of use.
- Bulk Importer
    - Added support for symbol characters when adding phone numbers in the Bulk Importer tool to avoid errors if dashes, slashes, etc. are included.
- Call Flow
    - Added Vertical Scrollbar on the Call Flow tool making viewing easier.
- Chat+/Presence
    - Disabled the tutorial button when Chat+ or Presence are active as the walk-through in the tutorial doesn't include Chat+ or Presence.
- Devices
    - Updated verbiage for consistency on Yealink models in Users & Devices > Devices.
- Installer
    - Updated the installer verbiage for consistency with system messaging.
    - Increased the number of characters accepted to 30 when setting an installer password. The password can include upper- and lower-case letters, numbers, and special characters.
- Jira
    - Added ability for system admin to restart Jira service.
- Updates
    - Removed the 'Apply Update Now' button if an update is already scheduled.
- User Panel
    - Added functionality of redirecting to the main User Panel page when the

logo in the top left of the screen is clicked.

- Presence
  - New local hold behavior allows a customer to either take agents our of a ring group while they are on hold so that they don’t receive calls when they are working with a customer, or function as it has in the past where hold still allowed users to receive another call.
  - Related to the new local hold option, administrators can now see the status of all agents in a group and manually take them to available if the agent gets stuck or can’t remove the hold themselves.

Bug Fixes

- Backups
  - Set scheduled backups to only run at the top of the hour they are set to.
- Bulk Importer
  - The Bulk Import tool now uses the User Defaults when creating a user.
  - Fixed an issue where if an error occurred in a Bulk Importer file upload, the values prior to the error would be submitted to the system and the file would not be appended to the history list.
- Call Flow
  - Fixed an issue where multiple custom destinations would be shown in the Call Flow tool after adding a custom option to an IVR.
- Chat+
  - Fixed an issue with scrolling in Chat+.
  - Chat+ sessions are now saved over night so users no longer lose their Chat+ sessions every night.
- Devices
  - Handset directories and configurable feature keys now display properly even if certain special characters are included in an extension or speed dial name.
  - Configurable Line Keys now show the key label properly on Yealink models.
  - Now all Polycom SoundPoint IP330 models register properly.
- Devices/Generic Extensions

    - Generic Extensions will now consistently register to devices properly.
- Dual Server
    - Improved Dual Server functionality so users are able to login to a secondary server.
- Feature Codes
    - The downloaded PDF of feature codes now matches the codes listed in the Feature Codes module in the User Interface.
- Generic Fax
    - When a new Generic Fax is added, it is immediately displayed on the Generic Fax list to reduce confusion resulting from a delay in display.
- Network and Firewall
    - Whitelisting an IP within the Network and Firewall module now unbans that IP if it had previously been banned.
- Presence
    - Fixed an issue related to permission levels in Presence.
    - Conference Calls launched through Presence no longer terminate when picked up by a user.
- Reporting
    - Saved custom queries are now shown in the Workflow Form Reports module even if only one Workflow Form was saved in the system.
    - An email is now sent when a scheduled report for Trunk Analytics is run.
    - Resolved issue where scheduled reports from before 2.1.00 would have Call Details Query listed as 'Undefined'
    - Fixed an issue where an error would occur in the Call Recording Reporting module if no extension was selected.
    - Downline analytics fix added column to Report 5 (Downline Stats by User - total talk time added now in the PDF report.
- Ring Groups
    - Fixed an issue where enabling ring group alerts without any recipients prevents all other ring group alerts from working.
    - A Ring Group with alerts toggled on but has no email recipients no longer

affects email alerts being sent for any other Ring Group.

- Ring Group Analytics
  - Discrepancies and inaccuracies in reports in Ring Group Analytics have been corrected.
- Users
  - Fixed an issue where the Bolt Username would not always contain the hostname.
- Workflow Forms
  - Fixed an issue where the Next Form button on the Workflow Forms in Presence would not be enabled.
  - In Workflow Forms, the Add Field Condition button is now available for Header fields.
  - Fixed an issue where choosing 'No Selection' while modifying the Go To Conditions in the Workflow Form module did not complete the selection.
  - Editing Workflow forms is no longer required to use workflows.
- Number Select
  - The number selector throughout the system no longer allows the selection of a number that's currently in use.
- Mobile User Interface
  - Fixed a rare issue where when initializing a call via the mobile User Interface, an error would occur.
- Alerts Tab
  - Fixed an issue where the Alerts tab would not immediately be visible after a new Ring Group was created.
- System Connectors
  - System connectors couldn't be deleted, now it's handling the error property.

Release Notes 2.1.01

Last Modified on 03/05/2019 3:57 pm EST

Updated Functionality

- Presence
  - Resolved missing Presence icons
  - Added tool tip to "Create extension Group" option in Ring Groups>Presence
- Loading Bar
  - Added a loading bar at the end of installer
- Global Directory
  - Global Directory now only lists primary extensions
- Ring Group
  - Updated Ring Group verbiage and validation of input for Prefix

Bug Fixes

- Configurable Feature Keys
  - Fixed an issue where configurable feature keys on Polycom devices would not save properly causing display issues on the device itself.
- Presence
  - Fixed rare occurrence where if Presence crashes, Kerauno becomes unresponsive.
  - Fixed an issue where some icons were not showing in Presence.
- Workflow Reporting
  - Resolved issue where if user saved custom query in Workflow Form Report and chosen Workflow Tag had an apostrophe it would fail to save the custom query.
- Logs
  - Resolved issue where Logs would record all users as having logged in from the same IP address.
- Bolt
  - Resolved issue where user with Bolt enabled would appear twice in Presence.
  - Fixed a visual issue where Bolt options would be visible when a user is being updated

despite Bolt being disabled.
    - Fixed an issue where a "Bolt Response: null" could show up in the Apply Changes log when a user's Bolt information was changed.
- Permissions
    - Resolved issue with permissions where a blank user would show up.
    - Removed blank options from the permissions list when creating a new user.
    - Fixed an issue where clicking "Render Report" would show all recordings in the system even if the user did not have permission to see them.
- Devices
    - Fixed an issue where the "Find New Devices" button in the Devices module was not responding.
    - Fixed an issue where Bolt Solftphone devices were not showing properly on the Users & Devices>Devices page.
- Voicemail
    - Resoleved an issue where the "Reset Voicemail Greeting" button would not auto-generate voicemail greeting correctly on first press.
- Ring Groups
    - Removed Bolt users from user selectoin in Ring Groups.
    - Creating a Ring Group with the "Require Agent Login" option enabled will now correctly save the agents in the Ring Group.
- eMail
    - Fixed a rare issue where system emails would stop working.
- Network & Firewall
    - Fixed a rare issue where the number of packets/bytes shown was incorrect in the Network & Firewall module.
- Bulk Importer
    - Resolved an issue where the bulk importer would allow a user to submit unusable values for Trunks in the Number Importer.
    - Resolved an issue where Bulk Imported Users would appear twice in Presence until updated.

- Administration
    - Fixed an administrator timeout when set to 0 which caused the admin session to never expire.
    - Fixed an issue where a user would be taken to the Trunks page when they selected the Voicemail Blasting tile from the System Admin dashboard.
    - Resolved an issue where Server Restarts could take upto around 20 minutes.
    - Fixed an issue where Yealink CP860 would not register to a user extension.
    - Fixed an issue where an extension re-used by a new user allowed the new user to see calls from the previous user.
    - Fixed an issue where data that took over a minute to render would get a 504 error.
- Reporting
    - The Agent Analytics report will no longer freeze if the agent has no calls.
- User Interface
    - Fixed a user interface issue where the window was resized to a small window messed up the image.
- Speed Dial
    - Fixed a rare issue where a new Speed Dial wouldn't work on creation until an update occurred.
- Call Center Status
    - Fixed a rare issue where the Call Center Status sync would not work.
- Phonebook
    - Resolved an issue where User Extensions would display as 0 in the Phonebook>Extensions Listing tab.
- Department Listing
    - Resolved issue where departments did not appear under the Department Listing.
- Call Flow
    - Fixed an issue where the Call Flowviewing screen would not load properly when a new Call Flow was created.

Release Notes 2.1.00 Video

Last Modified on 03/05/2019 3:57 pm EST

Kerauno 2.1.00 Release Notes Video

Click the play (▶) button to view the video

Your browser does not support HTML5 video.

Release Notes 2.1.00

Last Modified on 03/05/2019 3:57 pm EST

New Functionality

- Reporting and analysis are invaluable to improving communication, so we added even more information to the reporting tool! You will now be able to see additional call details and filter certain reports based on the details you want to view.
- The updates made to the Devices module will improve the way you maintain and interact with your handsets, including several phones being added to the Certified Devices list and increased personalization for Polycom and Yealink models.
- Real-time notifications on the status of your communication platforms is critical to providing the best customer service. That is why we have added additional email alerts so you can be notified as soon as specific settings have been exceeded.
- Added real-time email alerts for ring groups under Call Routing > Ring Groups > Selected Ring Group > Alerts.
- Added the ability for installers to check network status by using ping, trace route, and MTR commands. Ping and MTR commands have options for more extended tests of network.
- Added the ability for Administrative and Installer level users to have access to other users' voicemail boxes.
- Added the ability for users to export phone numbers by department on Phonebook PDF Export.
- Introduced "On-Demand Call Policy Override" to the Users module. This allows a user to override any other policies introduced (via conferences, ring groups, etc.) in the call flow and toggle on/off call recordings at any time.
- Added the ability to find the nearest available extension to an extension that is unavailable.
- Added "Mute On Page" functionality to the Default User Setting. This gives users with access to Default User Settings the ability to determine if handsets will

automatically be muted when a page/intercom comes in. (This functionality is only for Polycom and Yealink handsets).

- Added the ability to schedule system updates to occur automatically at a chosen date and time.
- Added the ability to manage which ring groups and departments a user is in from the user dashboard.
- Added the ability to manipulate the order in which the Configurable Feature Keys appear on Polycom devices.
- Added "Disable Ability to Create Public Channels" toggle to the Chat+ section of the Advanced Settings module.
- Added the ability to import SIP Trunks using the Bulk Importer tool.
- Added Timezone as an option on Device Bulk Import.
- Added the ability for Admin level users to now have an alert sent to their email when the concurrent calls in the trunk exceeds the set limit.
- Yealink T42S is now fully certified.
- Added Fax Success or Fax Failure Email alert options in the Advanced Settings module.
- Yealink T46S is now fully certified.
- Added Agent Answered to the Call Recording File when using FTP Remote Storage.
- Added Bolt Enabling to User Bulk Import feature.
- Polycom VVX501 is now fully certified.
- Added "Passive Mode Off" option to Remote Storage and Backup/Restore modules when adding a Remote Destination.
- Added Generic Extensions as an option to the Bulk Import feature.
- Added the ability for users with access to the global Devices Module to reboot all devices one at a time with a time gap between each reboot.
- Added the ability to select an IP Address for individual devices that differs from the IP Address set globally.
- Yealink T48S is now fully certified.
- Polycom VVX411 is now fully certified.

- Polycom VVX311 is now fully certified.
- Added Line Key programming functionality for Yealink models that are fully certified. This includes BLF, Speed Dial, Parking Lot, Parking Spot, etc.
- Added the ability to execute backups on-demand in the system UI.
- Added Extension Settings to the Set Default User Configuration options.
- Added the ability for an Admin level user to modify the Welcome Email.
- Added 'Time In Status' report to the Agent Analytics module.
- Added Abandoned Disposition metrics to the Ring Group Summary Report.
- Added 'Disposition' column to the Ring Group Call Details Report.
- Added 'Disposition' to In-Call Analytics in the Ring Group Analytics module which will show the reason that a call left a Ring Group.
- Added 'All Calls', 'Abandoned Calls', and 'Missed SLA' filters to the Ring Group Call Details Report in the Ring Groups Analytics module.
- Added ability to filter by Ring Group in Agent Analytics.
- Added 'Hold Time' field to In-Call Analytics.
- Added 'Agent Answered' as a column in Ring Group Call Details.

Updated Functionality

- Installer - Hosted instances will now grab an SSL certification once Network Settings are saved in the installer.
- Updated list of MAC Addresses to include the newest Polycom MAC Address Prefix.
- Updated the Guidelines listed for Bulk Import files for clarification.
- Updated the images & verbiage on the ISO.
- Improved Chat+ channel sidebar highlighting when there is an unread message in a channel.
- Increased logging of device logs and added searching/sorting of logs.
- Added soft bounce support for emails sent through the system.
- Updated the email alerting system for when an email is sent or a report is scheduled in the Reporting Module for consistency with the rest of the system alerting.
- Updated and added information included in the subject and body of emails

(scheduled and created on demand) sent from the Reporting Module.

- Changed the Blind Transfer feature code from "##" to "*3".
- Added editable name field for Polycom BLF programming that automatically loads user's name once an extension is selected.
- When restoring with a dual server configuration, the system will now check if both servers have the same version of the platform, then notify the user if the versions do not match.
- Added tooltips to Feature Codes for clarification of functionality.
- Resolved some potential issues with nightly memory clean up on instances with a time change on DST.
- Disabled the setting 'Allow IP Call' to prevent SIP hacks.
- When using dual server configuration, the servers now authenticate with each other before restoring a backup.
- Added tooltip to Polycom Extended Configuration page on Line Key selection for clarification in regards to BLF programming.
- When modifying a holiday list, there is now a tab that shows all call flows using that list.
- Changing a holiday list now updates all call flows that use it.
- Number Selector option 'Create New Number' will now redirect the user to the Add Number page of Number Manager.

Bug Fixes

- Fixed an issue for AD configured systems where an error box would be visible incorrectly when user data was updated.
- Fixed an issue for AD configured systems where when user settings are saved after only modifying the Bolt password, the new Bolt password would not save.
- Fixed issue where users who have never received a voicemail could not receive voicemail blasts.
- Fixed an issue where some Cisco models were rebooting when an automatic upgrade failed.
- Fixed a rare issue where some elements would be hidden in the Presence UI.

- Fixed rare case where some Yealink phones would not show in the UI.
- Fixed an issue where the device settings would not reflect a change if the primary or secondary interface was updated.
- Fixed an issue where name changes to a user would not be reflected on Chat+.
- In-Call Analytics - Fixed a rare issue where there would be an error when rendering a call.
- Fixed an issue when there is a scheduled Trunk Analytics Report, the trunk was not properly displayed.
- Fixed an issue where Call Recording Reports being exported to CSV would separate the CID Name into separate cells when the CID Name included a comma.
- Fixed an issue where Call Recording Reports did not have any data when a PDF was created (print, email, scheduled email) or when the data was exported to CSV.
- Fixed an issue where the system would attempt to save Salesforce records when the "unmatched account" feature was unset. This would cause unnecessary API requests.
- Disabled the ability for the "##" transfer feature code to be accidentally hit during a conference room call.
- Fixed potential issues with the firewall on a new ISO installation.
- Fixed an issue where the icon could be missing for the "CRM Widget" in the Presence Dashboard.
- Fixed an issue where the special call flows drop down would sometimes show an empty special call flow.
- Fixed an issue where data was not being displayed properly on the voicemail page of the user interface when a Voicemail Blast was sent from a user with a special character in their name.
- Fixed an issue where when a Voicemail Blast was distributed, an email notifying the recipient of the new voiecmail was not being sent.
- Fixed an issue where Bulk Imported users would not be affected by forced user configurations.

- Fixed an issue where Call Flows would not order correctly after renaming them.
- Fixed an issue where the Select All option in the Voicemail tab did not function properly.
- Prevented a rare issue of invalid users being added to ring groups which caused issues within presence and with reporting.
- Fixed an issue where if a Fax Caller ID was never defined for a user, it could send out as a "0000000000" caller id.
- Fixed an issue where new devices connecting to the system were unable to register.
- Fixed an issue where certain graphs caused crashes and unresponsive pages on Firefox.
- Fixed an issue where Polycom VVX501 handsets would not show the right time when set in EST or any other GMT -5 timezone.
- Fixed an issue with the Call Flow tool when removing/changing destinations for Time Conditions where the "Apply Changes" prompt wasn't provided and could cause confusion with routing.
- Fixed an issue with specific Yealink models (T22P, T41P, T42G) where the BLF light was not working properly - it will now automatically be green if that extension is available.
- Fixed an issue where phones were not properly showing DST time - settings have been updated on Polycom, Cisco, and Yealink phones so DST is automatically updated without requiring a reboot or factory reset.
- Fixed an issue where ring group calls that went to an IVR Breakout would not get logged properly in Ring Group Analytics.
- Resolved some potential data discrepancies in Agent Analytics between reports.

Release Notes 2.0.01

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Updated Functionality

- Replaced 'skip' text with 'End Tutorial' on tutorial
- Fixed a visual issue with Chat that would occur if you resized the browser window or the desktop app while switching between tabs
- Fixed a visual issue in Chat+ where "More unreads" would overlap channels on the left side bar if a user had a lot of channels and there was a pending unread message
- For Yealink handsets with firmware versions 73+, updated naming of the remote phonebook to improve clarification/ease of use.
- Fixed an issue where the User Menu could appear behind the Call Flow menu in the Call Flow module.
- Updated Workflow Form Report PDF Export title for consistency.
- Removed unnecessary timestamp in Start Date on Report PDF Exports.
- In the Workflow Form creation and modification, Workflow Tags selection moved directly below the Label field for clarity.

Bug Fixes

- Fixed a rare issue where configuring a user for chat would not work.
- Fixed issues with Salesforce Integration when utilized with the Bolt Softphone in v2. Also resolved some smaller nuisances & memory related issues in the User Interface within Salesforce.
- Fixed an issue where clicking a system notification (that pops up in the bottom right corner) would show an error or would open a blank page when clicked.
- Fixed issues with pausing & logging in/out that could occur if Call Center Status Sync was disabled.
- Fixed an issue where devices shown with registration filters were not filtering results properly.
- Fixed an issue where on reboot, Yealink T23G handset configurable line keys changed account association and became invalid lines.

- Fixed a rare issue that could cause high CPU load
- Fixed an issue where system connectors would not pass ring groups when dialing between paired systems.
- Fixed an issue where the user selection on a Scheduled Report could display blank users.
- Fixed an issue where directory greetings were not playing if they were set using the recording feature in the UI.
- Fixed an issue where Music On Hold options were not being re-ordered properly.
- Fixed an issue where 3 and 4-digit extensions on Polycom VVX 300 handsets were not being autodialed after a 3 second wait. This fix also allows 5-digit extensions to be autodialed after a 3 second wait.
- Fixed an issue where PDF Exports of Ring Group Call Details Report would not function unless the Run Report Button was clicked before exporting to PDF.
- Fixed an issue where start and end dates on PDF Exports of Downline Reports and Call Recordings Reports could be incorrect.
- Fixed an issue where an alert would occasionally appear incorrectly stating that a user already existed after the user was removed then readded.
- Fixed an issue where the MWI light (voicemail) was indicating an unread voicemail, despite the voicemail being marked as "read" or being deleted through the UI.
- Fixed an issue where adding a new extension to the extension list for a user, the user interface would not always repopulate which could cause data inconsistencies.
- Fixed an issue where the add Workflow Tag button in the Add Workflow Form was missing.
- Fixed an issue where some files labeled as mp3 files were not properly uploading to the announcements/recording module.
- Fixed an issue where you could not always upload a backup file in hosted environments.
- Fixed an issue with the call recording audio player that would not allow a user to fast forward while also incorrectly showing where the user is in the recording.
- Fixed an issue where paging zones were not properly being added when a

department is assigned a paging zone post creation.

- Fixed an issue where the buttons on the Workflow Form Reporting page were disabled/enabled when they shouldn't be.
- Fixed an issue on premise instances where the HTTPS tab would not be clickable.
- Fixed an issue where resizing the browser could cause crashes in certain environments while running analytics.
- Fixed an issue where Live Chats would not work for the client on premise (non-HTTPS) instances.
- Fixed a rare issue where a voicemail pin could become blank for a User when forcing a setting in the Default User Configuration.
- Fixed a rare issue where you could not enable fax on users.

Release Notes 2.0.00

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New Functionality

- System Optimization was a major consideration for v2.0.0! All systems are now utilizing cutting-edge TLS (HTTPS) security and have been optimized to run incredibly fast! We've increased the software load speed by 200% and we think you'll notice!
- Kerauno Chat is now introduced and even better than ever! You now have the ability to send direct messages, group messages and EVEN gifs! File uploads, advanced searching & much more within the organization are available. Coupled with the internal messaging there is now advanced functionality to allow live chats within ring groups. Add the Live Chat widget to your corporate website now to have another form of communication where current/potential new clients can interact with you in a new form of media!
- The new Bolt Softphone client lets you take your office with you anywhere you go, keeping you connected via voice & video. Bolt can be provisioned through the user interface and provides an unparalleled experience on the go!
- Workflows are critical to every single workday, just as communications are, so we decided to make them part of the same platform! Welcome to the future of Kerauno, where you communicate with purpose. Workflow forms allow you to create custom forms for every interaction to collect & report on data with both inbound/outbound calls.
- At the top of your dashboard you will now see additional tabs. These give you the functionality to switch between your Kerauno Dashboard, Kerauno Chat and Kerauno Presence. This should provide that much needed real-estate for Kerauno Presence power users!
- Salesforce integration now has support for Accounts, Contacts, Leads and Organizations.
- In the Permissions module you can now set who has access to recordings in the Reports Module
- Added the ability to delete recordings in In-Call Analytics.

- Optimized the UI & Web Server to load faster.
- Presence now loads on login. Also, Presence desktop notifications will now be received throughout the entire app.
- Did some core upgrades to our DB engine that will optimize performance.
- AutoExEc - Certified Yealink SIP-T29G with AutoExEc.
- AutoExec - Certified Polycom 7000 with AutoExEc.
- Added the toggle for Find Me in the User dashboard.
- Added the ability to quick search for conference rooms.
- Certified Polycom VVX 501 with AutoExEc.
- AutoExEc - Polycom VVX 400 has been certified with AutoExEc.
- Call Flow - Added ability to export a call flow as an image to download.
- Ring Group Analytics - Added 'Hold Time' column to the 'Ring Group Call Details' report.
- Added "De-Sync With AD" button in Users module.
- Improved the experience of Number selects throughout the system.
- Optimized the UI & Web Server to load faster.
- Premise HTTPS Support - You can now generate a CSR/Key and input an SSL Cert in System & Settings -> Network & Firewall module.
- Hosted HTTPS Support - HTTPS is now automatically enabled on Hosted Licenses.
- Added browser toolbar color when using Chrome on Android devices.
- Added splash screen support on Android devices when saved as a web app.
- Added an app icon for when saving the UI as a web app on mobile devices.
- Certified Yealink T41 for BLF functionality
- Bulk Import - Added Blacklist to the Bulk Import Tool.
- Bulk Import - Added support for storing and displaying the original file name when importing bulk files.
- Call Flow Tool - Added the ability for users to zoom in and out on the call flow tool.
- Call Flow Tool - Added the ability for users to collapse and expand the call flow nodes.

Updated Functionality

- Force User Settings - When forcing a setting to all users in Default User Configuration, the user will be prompted to Apply Changes to the system without a refresh.
- API - Added additional documentation to the API module.
- Fixed an issue where the UI would take longer to load after a session expired.
- The UI will now load much faster when accessing from a mobile device.
- Changed the voicemail download filename to be "[EXT]-[DATE]-[TIME].mp3" rather than "call-recording.mp3".
- Added FTP Checking when setting up FTP Stores. If the remote storage destination cannot be authenticated to you will get a verbose error.
- Added some fixes that will clean up old reporting data to decrease database size and optimize performance.
- Refactored the way click to dial works. On a click to dial action, you will now be prompted versus having to configure it on the dashboard.
- In Agent Analytic Reports, added user first and last name next to extension listed on exported PDF.
- Resolved issue where the "Apply Changes" text would appear and cause the header navigation to drop down.
- BLF light on Yealink T46G will now automatically be green if that extension is available.
- Introduced the ability to hide mobile phone numbers in the system phonebooks under user settings.
- Ring Group Analytics - PDF Report will now show "Name: Extension" rather than just "Extension" when applicable.
- Permissions - Renamed "PBX Admin" permission as "System Admin".
- Widget headers in presence will now change colors based on Call Status.
- Improved the look & feel of the Change Log.
- PBX Connector is now called System Connector.
- Revised some verbiage throughout the system.
- Added a Service Worker that is utilized by newer versions of browsers to show

content when offline as well as optimize caching.
- Resolved visual issue on mobile with tabs bumping against each other.
- Added a higher-definition favicon that is used as the browser's toolbar icon.
- Added additional self-healing capabilities to the call processor.
- Scroll bar now rests against the footer on all browsers and operating systems and at any zoom level.

Bug Fixes

- Fixed issue with new extensions being set to the default caller id value when created instead of being set to the value of default.
- Fixed an issue where agent talk time could be off in reporting if they transferred to another agent.
- Generic Voicemails - Fixed an issue where the Voicemail Pin would not be restricted to the "Voicemail Pin Length Requirements" setting in System Settings
- Cisco ATA 186 - Fixed an issue where Cisco ATA 186 would not work with AutoExEc.
- Fixed an issue where "Disk Space Needed to Generate Backup" in Backup/Restore module would show up as blank.
- Fixed an issue where 911 Alert Emails could be sent if an extension was dialed that contains "911".
- Fixed an issue where you would not be able to email a Downline Report.
- Fixed an issue where the mobile web app would take longer to load than the Desktop web app.
- Resolved issue where "Undefined" would show up in the callflow toggle next to some options.
- Resolved issue where Remote Storage module would be visible regardless of additional storage capabilities.
- Yealinks - Fixed an issue where the times on Yealinks could be off.
- Polycoms - Fixed an issue where the time on Polycoms 501 & 601 could be off.
- Fixed issue where Line Keys on Yealink phones that had been programmed as BLF or Speed Dial keys were being reverted to Line Keys on reboot.
- Fixed an issue where Cisco 7940 phones were only showing "Cisco" on the

devices page.

- Fixed an issue where depending on the network interface, the installer would not save network information properly.
- Resolved issue where Call/Pickup Groups in Departments would not work if they were the first department created.
- Trunk Analytics - Fixed an issue where a 1-day Concurrent Call graph would show Date as an x-axis label instead of Time.
- V2 Voicemail Selection not working due to Angular Upgrade
- Fixed an issue where in some cases the welcome email would say "%ProductName%" rather than replacing it with the system's name.
- Downline Report - Fixed a rare issue where the Downline Report would get an error.
- Fixed an issue on Cisco phones where MWI would turn on even if "Remove voicemail from system after email has been sent?" was enabled.
- Fixed an issue where Cisco Phones could show "XML Parse Error" when using the Global Directory.
- Fixed an issue with some Cisco phones registering via TCP.
- Fixed an issue where you could not reboot a device through User Panel -> Devices module.
- Fixed the "Search Reports" functionality in the Select Reports pop up in Ring Group & Agent Analytics.
- Conferences Phonebook - Fixed an issue where a conference could show up as "Ad-Hoc" when it is actually a "Leader-Based" conference.
- NAT Settings - Fixed a rare issue where "Local Net/Subnet of System" would not show an input box.
- Fixed an issue where CDRs would show "*74" for all feature codes as well as CDRs with invalid destinations.
- System Health - Fixed an issue where the Database process would not be monitoring properly.
- Licensing - Fixed an issue where "Salesforce Users" would not have a Current Count value.

- Fixed a rare issue with Caller ID being wrong for internal calls on Polycoms.
- Polycoms - Fixed a rare issue where the VM softkey would be replaced by a "Buddies" softkey.

Release Notes 1.3.06

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New Functionality

- API - Added API to get Agent Statuses per Ring Group.
- Conference Agent Panel Features - Added the ability to create a "CAP" call from any source.
- Conference Agent Panel Features - Added Overflow destinations in Callflow Tool.
- Conference Agent Panel Features - Added Indexed Searching in the Call Recording Tool.
- Conference Agent Panel Features - Raised total rooms available to 150.
- Phonebook - Added ability to download a PDF export of the Feature Codes in the system.
- Added 'Disk Space Needed to Generate Backup' information to the Backup/Restore module.

Updated Functionality

- If server is set to HTTPS module, Presence will now automatically pop out. An issue where multiple tabs would open up has been resolved.
- Reworked the graphics/interactions with Callflow Toggles in the Kerauno Callflow UI.
- If First Name and Last Name are changed for a user, Display Name will also change as a result.
- System Logs - Cleaned up the system logs to hide unneeded system initiated events.
- Generic Extensions - Added 'Advanced' tab and reformatted the Generic Extensions module.
- System Logs - "axia" user is now called "Admin" in System Logs.
- Fixed some typos throughout the system.

Bug Fixes

- White Label - Fixed an issue where the 170x45 Logo was overwriting the

800x200 Logo.

- Removed JIRA Manager from User dashboards that do not have the JIRA Addon.
- Wallboards - Added some fixes that will prevent Wallboards from timing out.
- Cisco SPA Phones - Fixed an issue where some Cisco SPA Phones would have trouble registering.
- Fixed an issue where device remote reboots could not work.
- Global Wallboard - Fixed an issue where an agent name could show up as 'CUSTOM_AMI'.

Release Notes 1.1.06

Last Modified on 03/05/2019 3:58 pm EST

Release Date: 03/26/2015

New Functionality

- Added a major release to our Kerauno Presence server which includes better memory management, a backend to allow for further permission settings, lower client overhead and Single Sign On (this has been requested a lot!)
- Added Generic Fax Boxes which will allow for you to define users who will be able to see faxes going to a general account in their User Panel > Fax panel.
- Added CDR Type 'Fax' to CDRs - you can now filter for 'Fax' CDRs in the CDR Tool.
- Fax Module - Added In-Call Analytics links for Received Faxes.
- Fax Module - There is now a Fax Files tab where you can upload Fax Files that can be then clicked and sent with ease using the Send a Fax tool.
- Added the ability to toggle DND on a user from an Administrator level.
- Fax Module - Added Previews for each fax on Received Faxes and Sent Faxes that show images for up to the first 2 pages of the fax.
- Added the "Remember Me" toggle on the login page.
- Fax Module - There is now a Fax Settings tab where you can set your fax Caller ID to either the Trunk Default Caller ID, to a Generic Fax #, or to your DID
- Added Voicemail Blasting in PBX Admin > Voicemail Blasting. This feature allows you the ability to distribute a pre-recorded voice greeting to multiple users on the system at once.
- Added Device Log in Users/Devices > Devices.
- Fax Module - You can now upload a Cover Page for your faxes
- Certified Polycom IP5000 with AutoEXeC
- Added the ability to select a generic extension in the Devices tab.
- You can now modify everything that was available in Callflow -> Ring Groups through the Callflow Tool.
- Fax Module - Disabled ‘Send a Fax’ button if faxing is disabled.

- Removed all instances of the 'CDR ID' field in Reporting.
- Changed CDR Type 'Ring Groups' to 'Ring Group'

Updated Functionality

- Minimized the installer to just 4 steps ('Start', 'Terms of Use', 'Network & Time', 'License') which resolved some bugs in the installer.
- Hunt Groups can now be organized when modifying a ring group as well.
- Improved the aesthetics of the Fax module.
- Reporting - Changed all reports titled 'Average Handling Time' to 'Average Talk Time'
- Tweaked the values allowed in Ring Strategies to allow more flexibility.

Bug Fixes

- Resolved issue with phone registration email alerts not going out
- Fixed an issue where voicemail secrets could not start with a zero.
- Resolved issues with Generic Extensions requiring a reboot after updating the device.
- Fixed an issue with the Post API that would cause it to crash and cause load on the system.
- Fixed an issue in the Find Me/Follow Me module where a user would be prevented from saving their settings.
- Fixed verbage on Users for Kerauno Presence + Resolved problem with FMFM settings on a new user.
- Music on Hold will not properly update the default playlist at all times on a system rebuild.
- Fixed issue where you couldn't restart the web server from system health.
- Fixed Generic Extension validation and now only allows proper inputs.
- Fixed an issue where Faxes would sometimes not send due to a backend permission problem.
- Scheduled Reports - Fixed an issue where report parameters would still be showing up as "undefined".
- Fixed issue where phonebook would export extra options
- Resolved an issue where you couldn't add an email in System Alerting

- Fixed an issue with the installer that would occur after initially applying a license.
- Resolved problem where backup email notifications were not being sent.
- Fixed verbiage in ring groups to accurately reflect the ring group agent restriction settings

Kerauno Desktop Application

Last Modified on 11/12/2019 2:36 pm EST

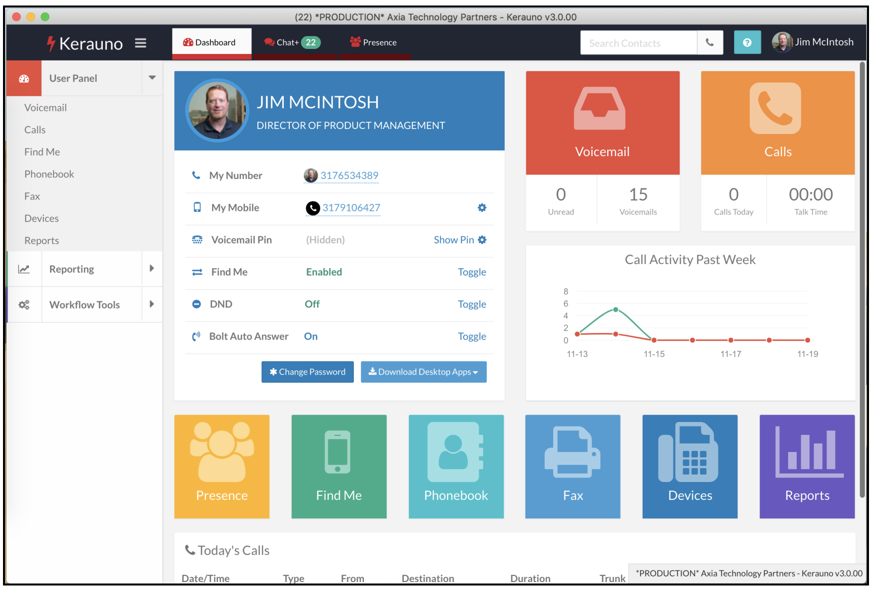
The Kerauno Desktop Application offers power users and administrators concerned with system configuration an alternative to operating in a browser-based experienced.

Power users who work in Kerauno all day don't have to worry about getting lost in browser tabs or switching contexts as they work if they use the desktop application.

The application also enhances performance by being isolated from additional web pages and tabs that can consume excessive memory or processing resources (~50% less).

For administrators supporting many power users of Kerauno, the application offers control over workstation configuration. This saves administrators time and resources troubleshooting cross platform and browser issues with a SaaS application.

Uses will notice that the experience is similar to a web browser minus unnecessary address bars and controls like browser plugins that can take users away from the core functions needed to work.



Installing the Application

You can download the desktop application from the dashboard page in the user profile:

Microsoft Windows (https://axia.keraunopbx.com/Kerauno.exe)

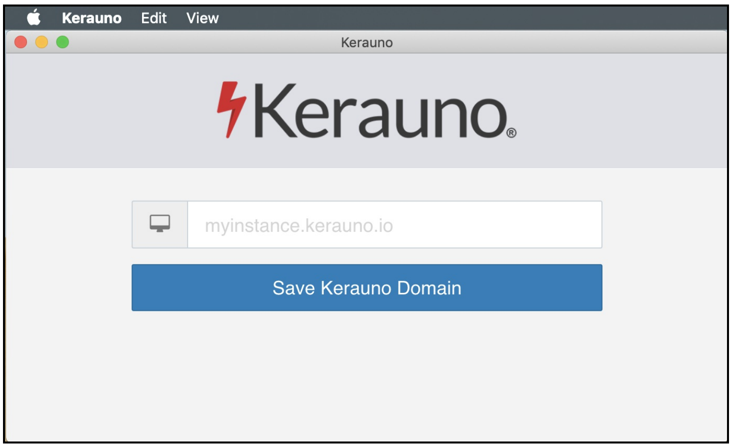
Mac OSX (https://axia.keraunopbx.com/Kerauno.dmg)

For those who have already installed a prior version and would like instruction on updating the application, click here.

Configuration

Set the account domain

This is the URL that you would enter in the address bar of a web browser.



If you are ever signed out, you can re-enter or change the domain by clicking on the Kerauno menu and "Change Kerauno Domain" option to bring you back to this page.

Refreshing the Application Screen

If the application is ever stuck or needs refreshing, you can use your keyboard and CMD+R or click Refresh located under the View menu.

Upgrading the Desktop Application

Last Modified on 11/12/2019 2:39 pm EST

There are 2 different paths to install or upgrade your desktop application:

- The first one allows you to upgrade from within your current app. If there is an upgrade available, you should see "Download Desktop Apps" button available in your app. This will allow you to download the latest version for OSX or Windows platforms.

- If you do NOT see the "Download Desktop Apps" button then you can find the installers here for Windows or here for Mac.

Next, we want to download and run the installer for Windows or Mac.

Note: If you see an older version (e.g., Kerauno-x64) you may decide to keep it as a reference or uninstall as needed.

Make sure you add your Kerauno Domain, save it, then login in with your credentials provided.

Note that the title should reflect a combination of your name "*PRODUCT... " and the version of the application "Kerauno vX.X.XX" you have installed. If you see a version older than what you expected please make sure you installed the appropriate instance prior to the Desktop Application.

For more information see the "What's New?" section of the Knowledge Base.

Zoom Integration User Guide

Last Modified on 11/28/2018 7:43 pm EST

This article describes how to utilize the Zoom Integration feature within Kerauno for the purposes of screen-sharing and video conferencing.

Prerequisites:

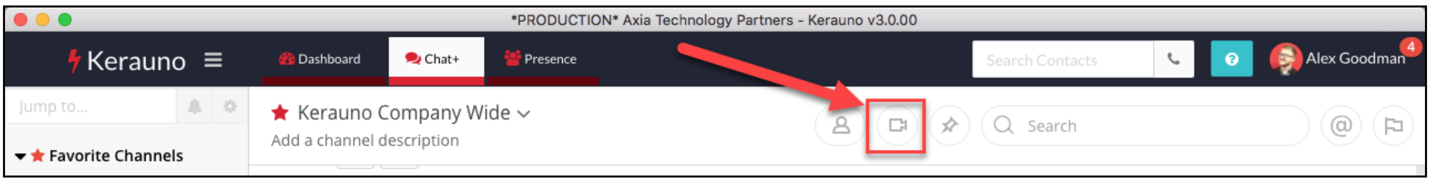
1.) You must have the Zoom Integration option configured within your Kerauno system (you can check with your system administrator if you are unsure).

2.) You must have a Zoom Pro, Zoom Enterprise, or Zoom Business account in order to utilize Kerauno's Zoom Integration features.

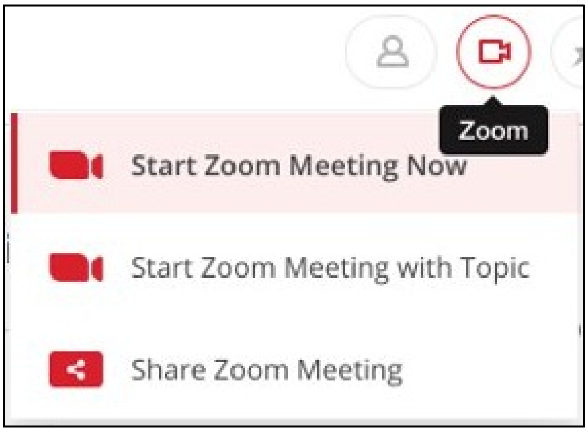
Note: The primary email address of your Zoom account must match the email address/username of your Kerauno account. Otherwise, Zoom integration will not function as intended.

Starting a Video Conference/Screenshare Session

Any user that is configured for the Zoom Integration feature will see an additional option within the header bar of the Chat+ application. To kick off a new video conference/screenshare session via Zoom, click the Video Camera Icon as detailed in the screenshot below.



This icon can be shared within public channels, private channels, direct messages, or SMS messages (Beta). After this icon has been selected, there are 3 different options shown, all of which will initiate a Zoom session.



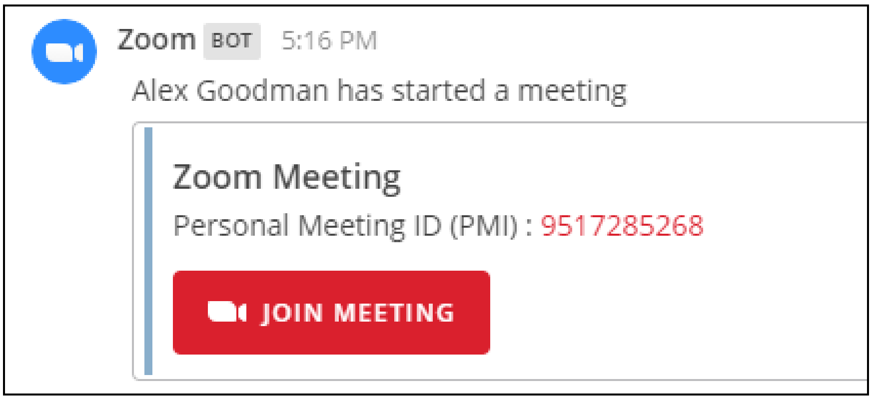
1.) **Start Zoom Meeting Now** - This options post a Zoom link in the currently active channel.

2.) **Start Zoom Meeting with Topic** - This option posts a Zoom link in the currently active channel, but allows the creator of the session to provide a title to the meeting for additional context.

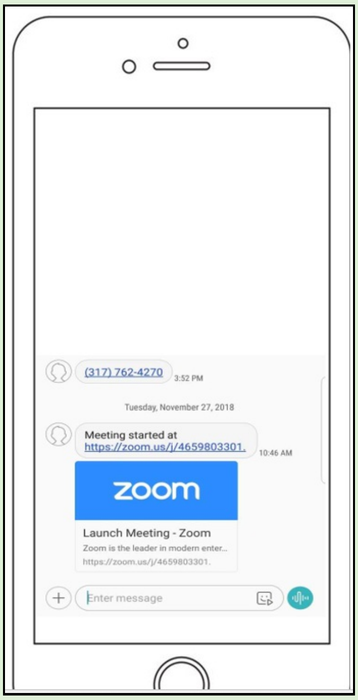
3.) **Share Zoom Meeting** - This option allows a user to copy a meeting invite and paste it into other applications so that it may be shared.

Note: all screenshare's initiated from Kerauno will be shared via the user's Zoom PMI (Personal Meeting ID). A user's Personal Meeting ID can be changed within the Zoom App.

Once the meeting has been posted in a Chat+ Channel, any user who is able to view that channel can easily join the newly created Zoom Meeting by clicking the "Join Meeting" button that is posted into that particular channel.



TIP: Zoom Meeting's can also be shared via SMS, so that external participants who are not users on the Kerauno system can easily join video conference sessions from their mobile devices. See below screenshot for an example as to how a shared video conference looks on a receiving mobile device.



Kerauno for Salesforce

Last Modified on 11/13/2019 12:27 pm EST

This article contains steps for installing the Salesforce for Kerauno Managed Package outside of the Salesforce AppExchange for both Lightning and Classic.

Required Components

- Managed Package (link provided by Kerauno)
- One of the following force.com experiences:
  - Lightning
  - Classic
- One of the following communication methods:
  - Softphone
    - Bolt Softphone version 5.5.3 or higher
  - Presence
  - Physical handset
  - Physical devices supported by Kerauno
- Kerauno (version 3.1 or higher) configured for Salesforce.

Lightning Experience

Installing the Managed Package

The Managed Package provides the integration means from Kerauno to Salesforce.

Note: Salesforce supports Chrome, Firefox, Apple Safari, and IE 11+ for installing the Managed Package.

The Managed Package provides the following interactions:

- Inbound Screen Pop
- Outbound Click-to-Call
- Record Association
- Auto Task Provisioning

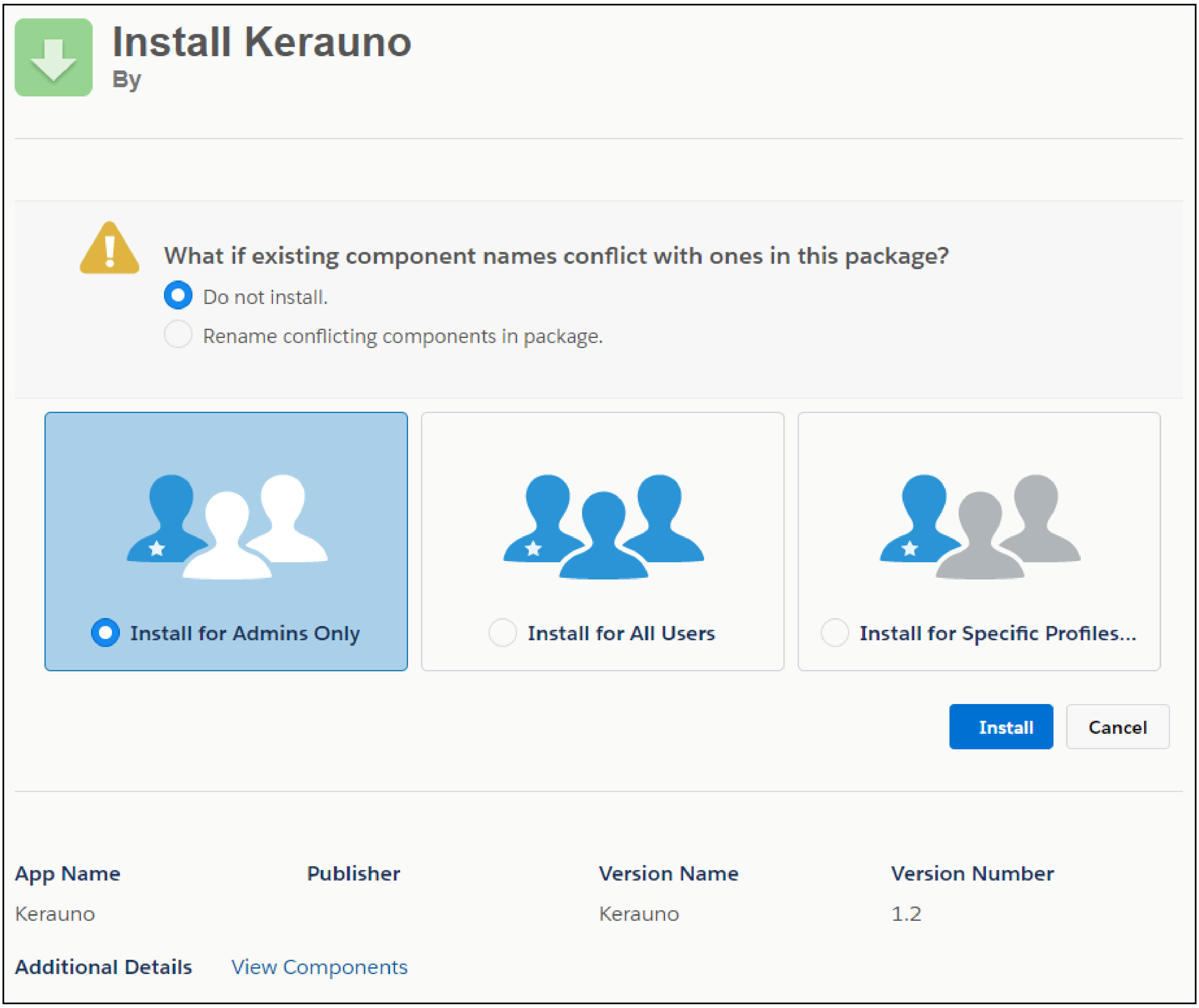
- Call Statistics

The link to install the Managed Package will be provided to you by Kerauno.

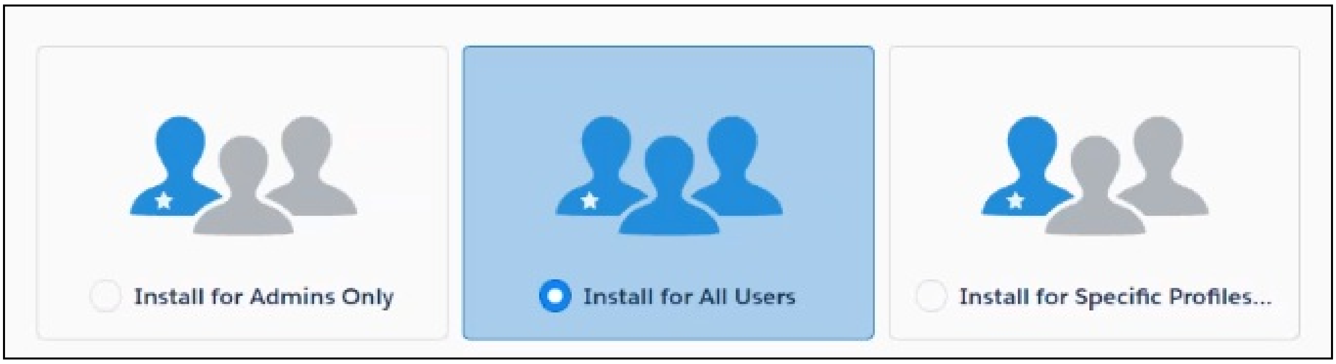
Complete the following steps to install the Managed Package:

Log in with the Salesforce System Administration Account.

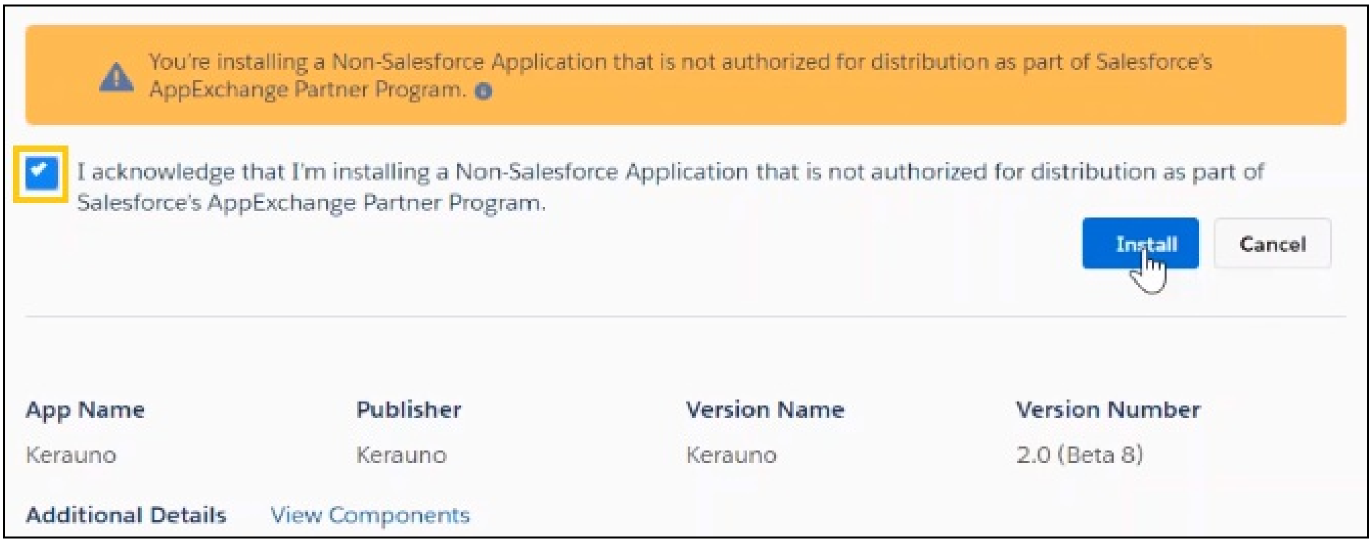
At the following screen, click the radio button for **Do not install** for the existing component naming conflict question:



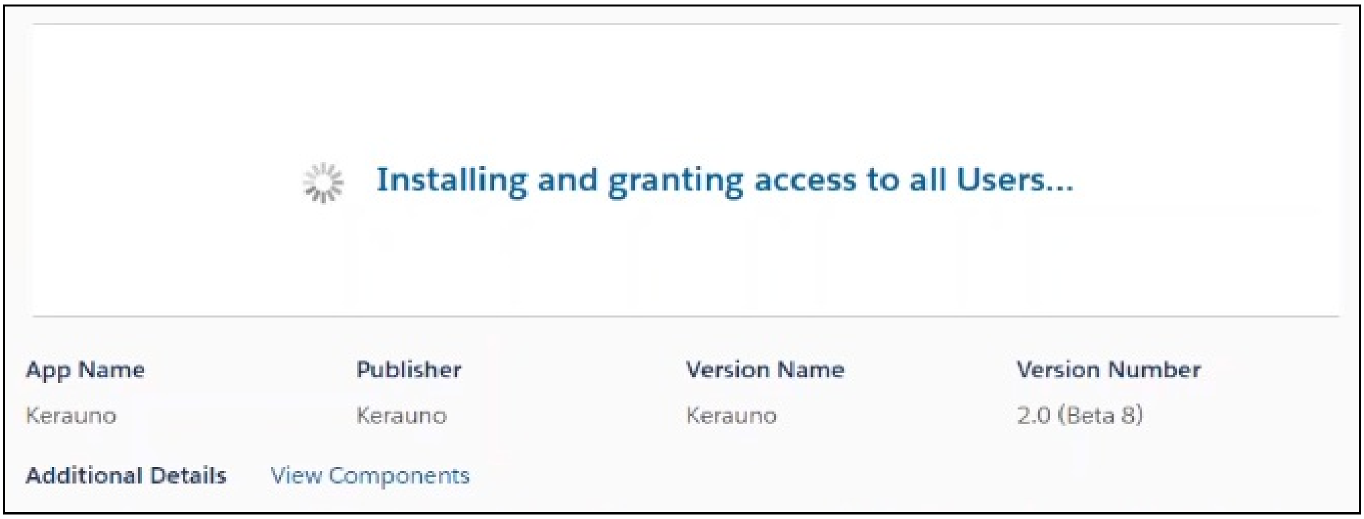
Select **Install for All Users** from the 3 install options:



Read and check the acknowledgement message (if displayed), and click **Install**:

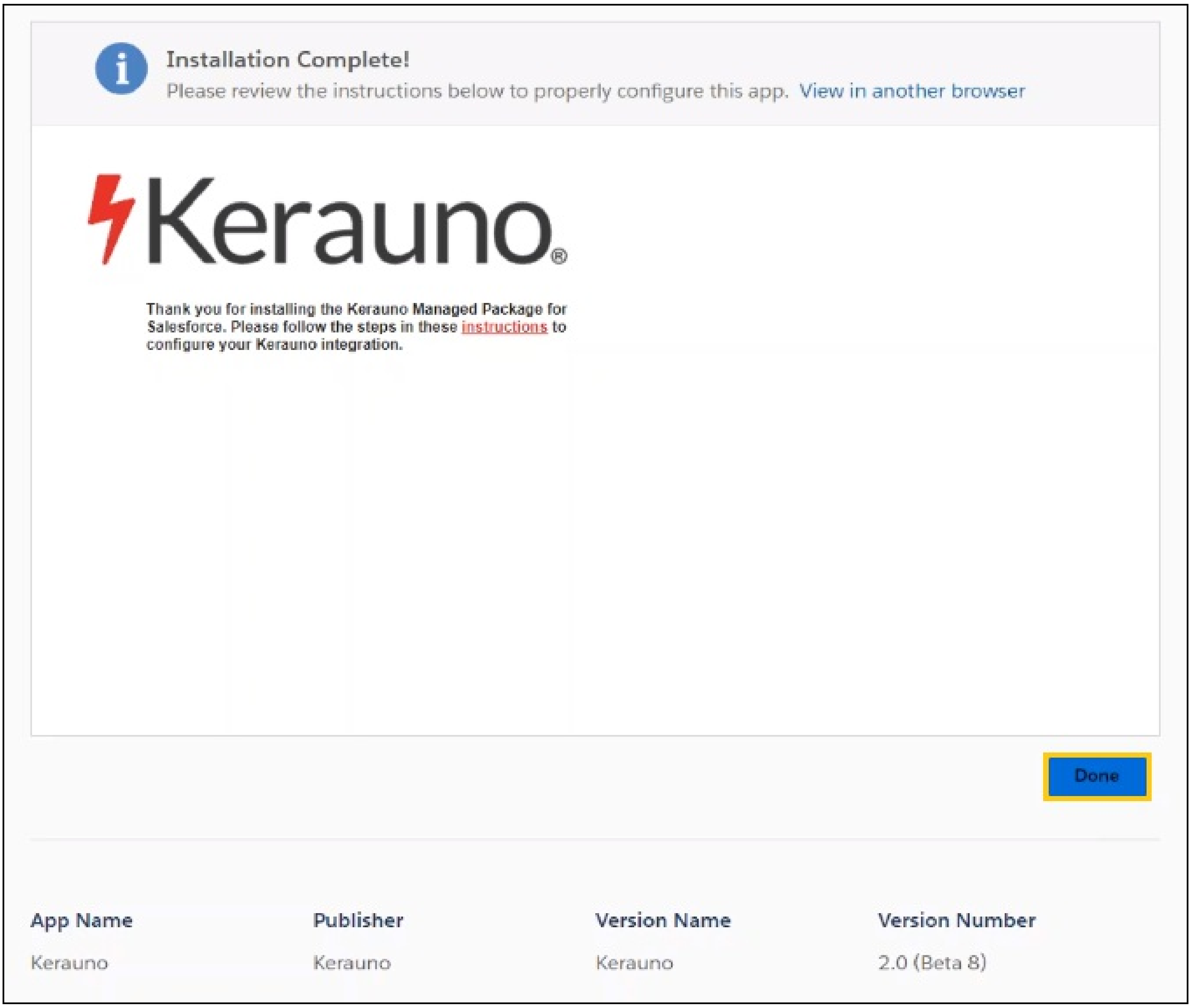


Result: A progress window displays during the installation:



Note: This could take up to a few minutes to complete. A message may display indicating the install is taking too long; an email will be sent when the install is complete.

When the install finishes quickly, the following is displayed. Click **Done**:

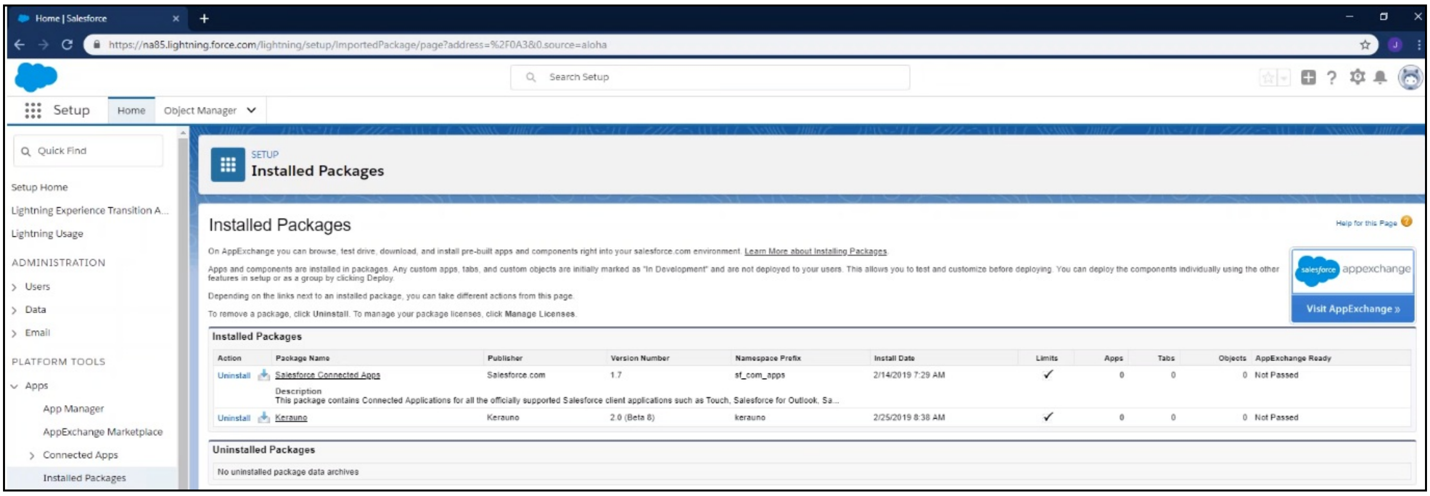


Determining Salesforce & Kerauno Instances

Configuring the Server and Instances attributes outlined below is necessary for Salesforce to understand which Kerauno instance you are associated with and for Kerauno to understand which Salesforce instance you are accessing the integration from.

If not automatically directed here once the installation is complete, navigate to Setup > Home > PLATFORM TOOLS > Apps > Installed Packages.

The Installed Packages screen displays:



Copy and paste the following text into Notepad or similar editing tool.

Note: Domain names may vary depending on your system:

Kerauno Server: {server}.kerauno.io

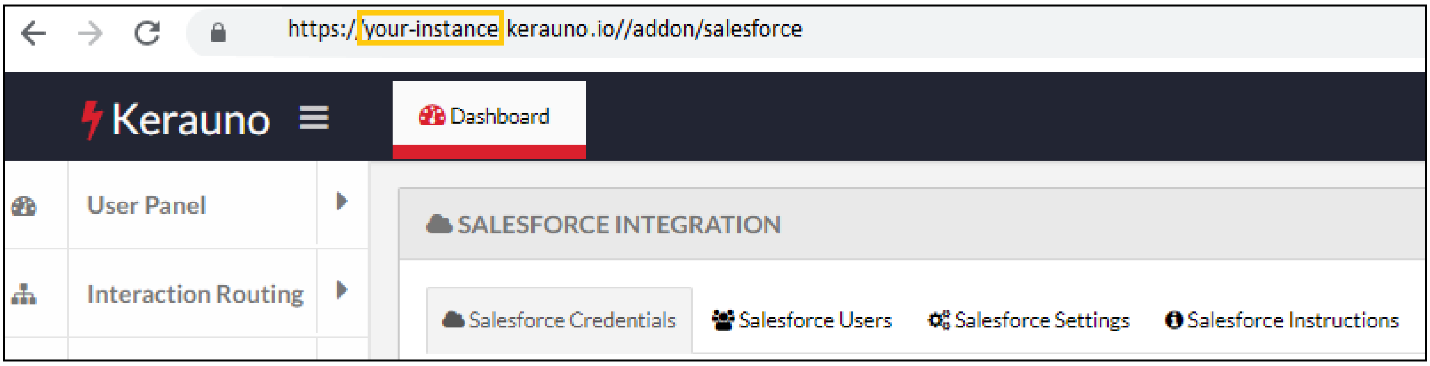
Lightning Domain: {Lightning Domain instance}.lightning.force.com

Visualforce Domain: kerauno.{Visualforce Domain instance}.visual.force.com

AdapterPage URL: (Collected later in installation steps)

To identify the Kerauno instance, access the Kerauno web app. Locate the Kerauno Server name in the browser URL.

In this example, the server name is **your-instance**.



Copy and paste the Kerauno Server name in the {server} placeholder in the text editor.

Example:

Kerauno Server: your-instance.kerauno.io

In Salesforce, locate the Salesforce Server Instance in the browser URL:

In this example, the Server Instance is na85. Copy and paste the Server Instance name in the {Instance} placeholders.

Example:

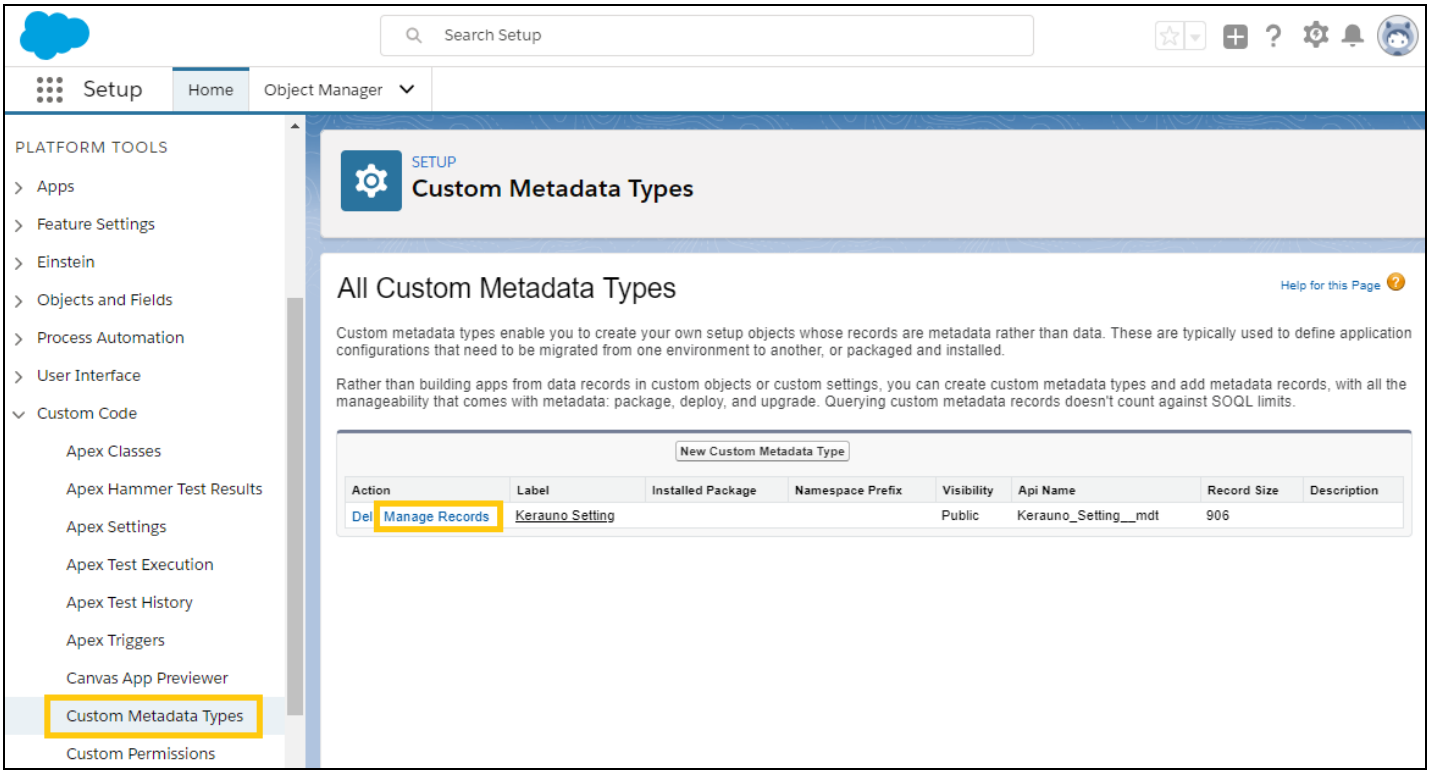
Lightning Domain: na85.lightning.force.com

Visualforce Domain: kerauno.na85.visual.force.com

Custom Metadata Setting

Metadata settings are required to facilitate communication for the Kerauno Salesforce integration.

Navigate to Setup > Home > PLATFORM TOOLS > Custom Code > Custom Metadata Types. Click **Manage Records** next to Kerauno Setting:

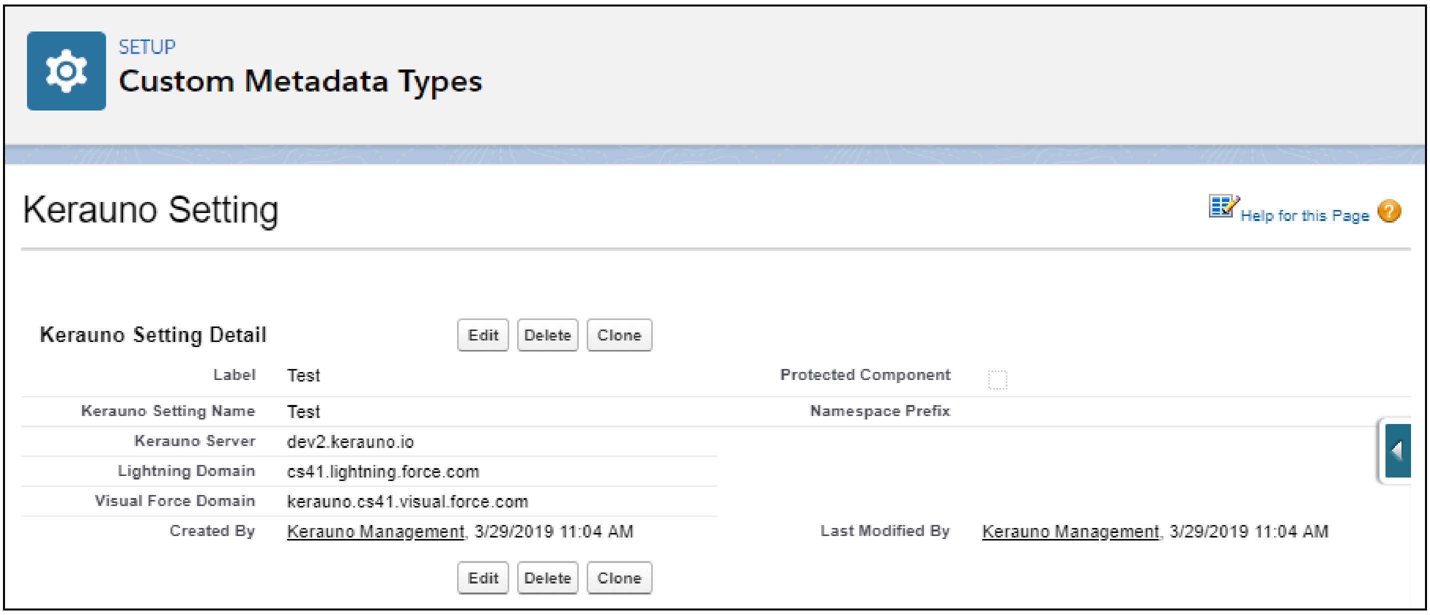


Click **New** on the resulting Kerauno Settings screen:

Populate the New Kerauno Settings screen and click **Save**:

Field	Input Description
Label	Enter a Kerauno Setting Name to be used when it loses focus.
Kerauno Setting Name	Auto populates once a Label name is provided.
Kerauno Server	Copy and paste these from the [Determining Salesforce and Kerauno Instances]() section. **Note:** These Domain names may vary depending on your system.
Lightning Domain	
Visual Force Domain	
Screen Pop Inbound	Leave these blank unless instructed otherwise.
Screen Pop Outbound	
Custom Object 1	
Custom Object 1 Number Field	
Customer Object 1 Phone Field	

The saved setting details display once saved:

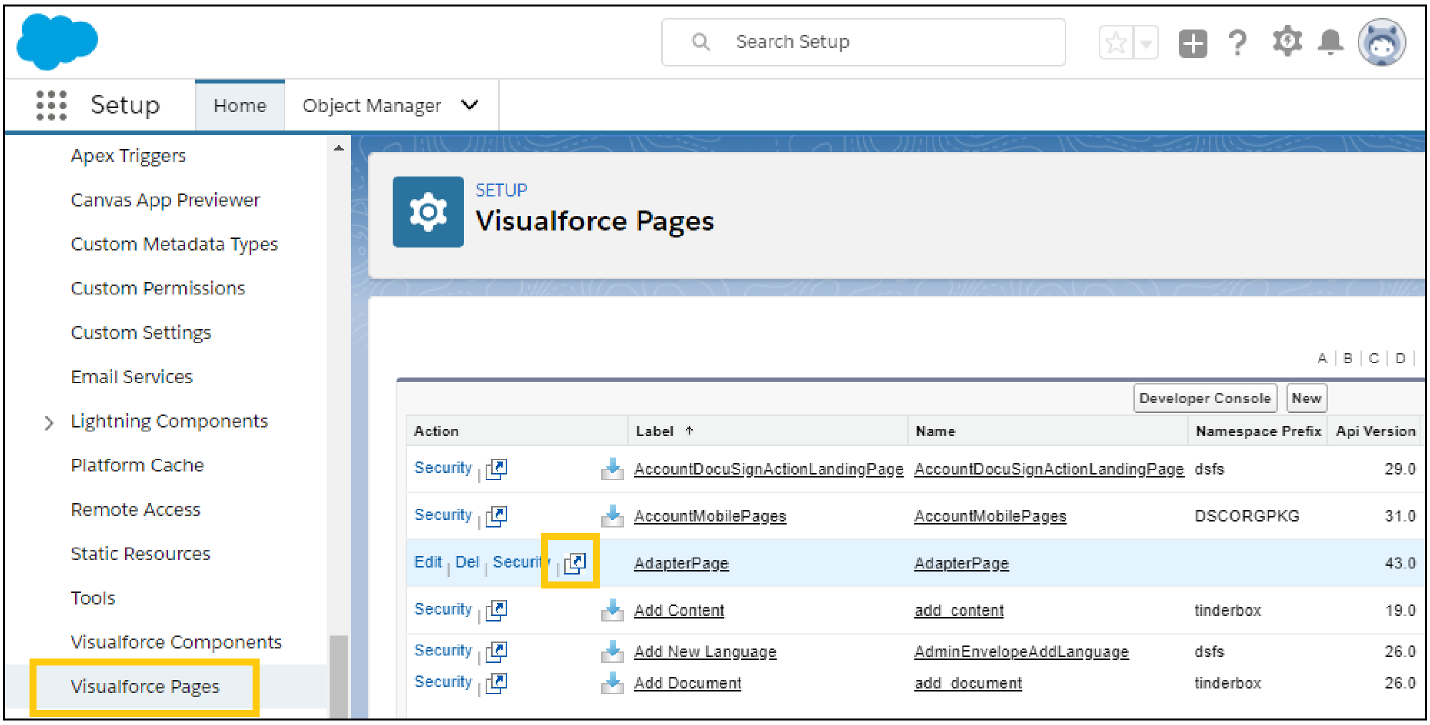


Set up Call Center(s)

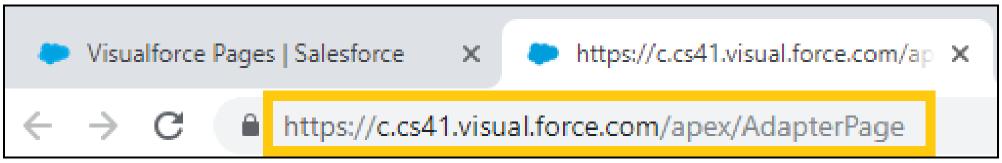
The Managed Package includes a Computer-Telephony Integration (CTI) to Salesforce Call Centers. The integration facilitates inbound and outbound calls; while capturing call details and notes.

Navigate to Setup > Home > PLATFORM TOOLS > Custom Code > Visualforce Pages.

To identify the URL for the AdapterPage, click the preview icon next to **Security** for the **AdapterPage** Label:



Copy the URL that displays for the AdapterPage in a new browser window and paste it into Notepad or a similar editing tool:



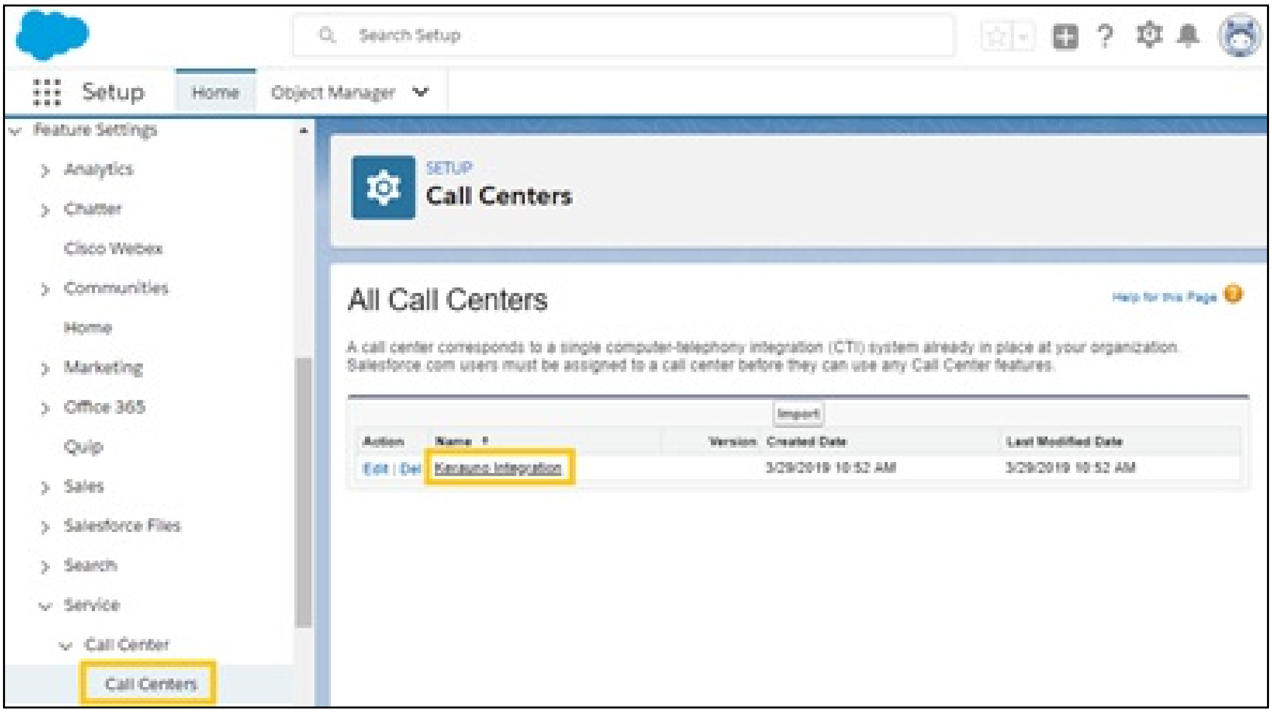
Example:

AdapterPage URL: https//kerauno.na85.visual.force.com/apex/AdapterPage

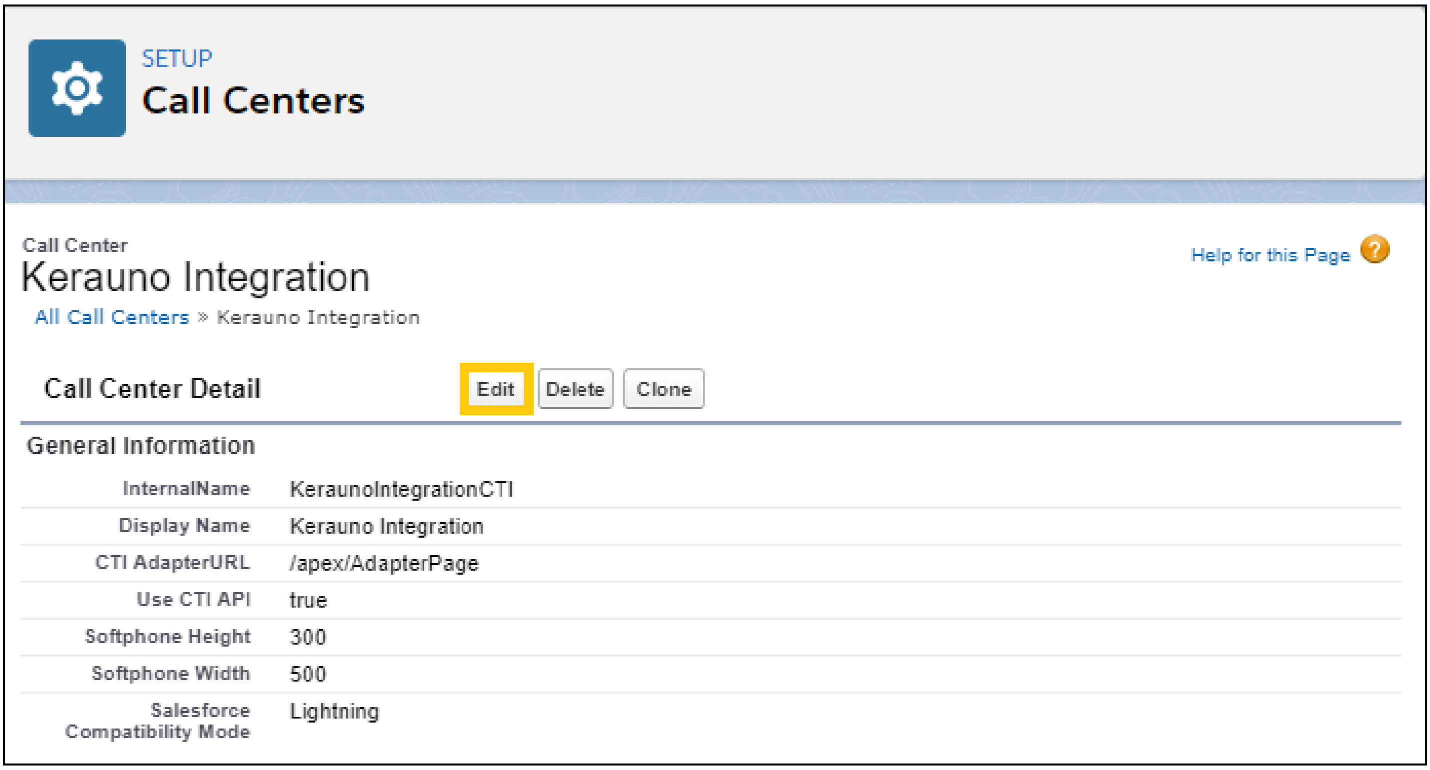
Note: The AdapterPage may not load until everything is fully configured.

Navigate to Setup > Home > Feature Settings > Service > Call Center > Call Centers.

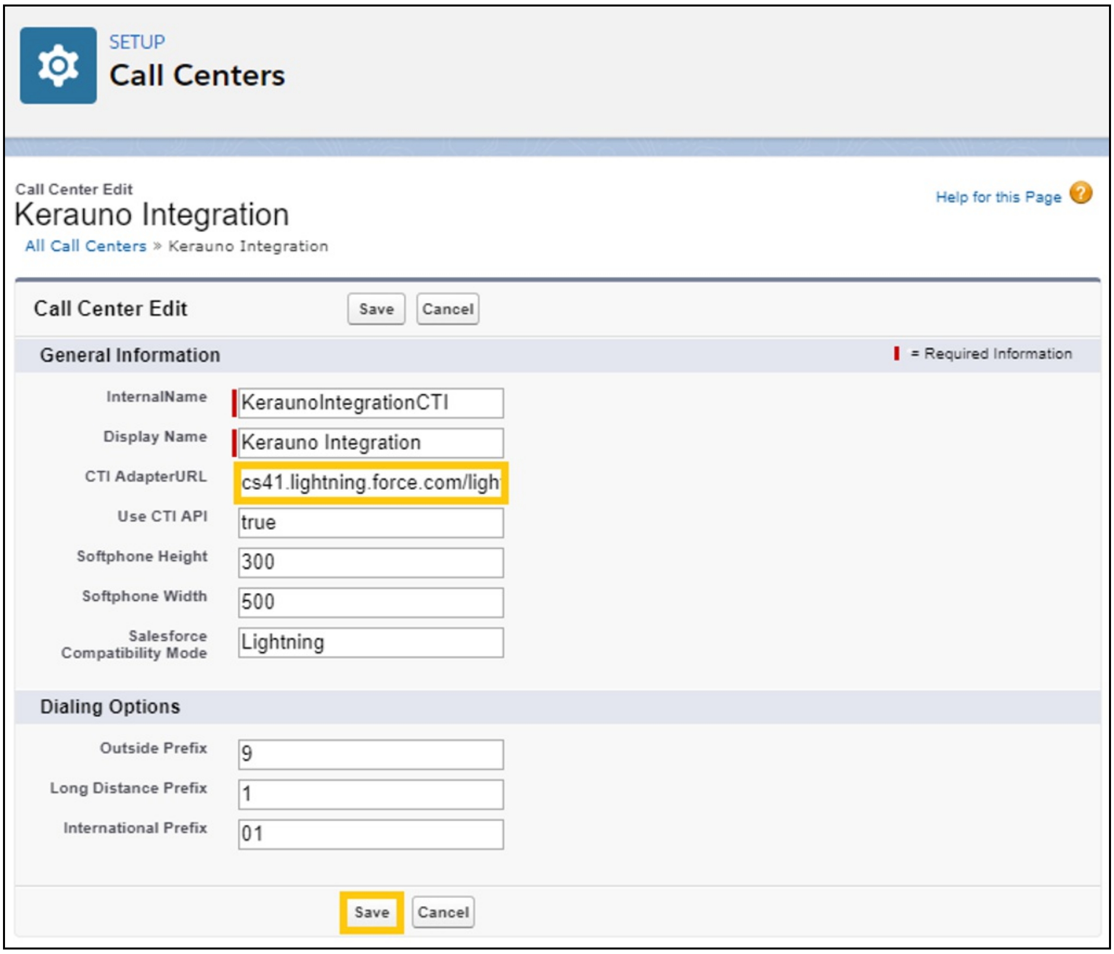
Click the **Kerauno Integration** Lightning hyperlink:



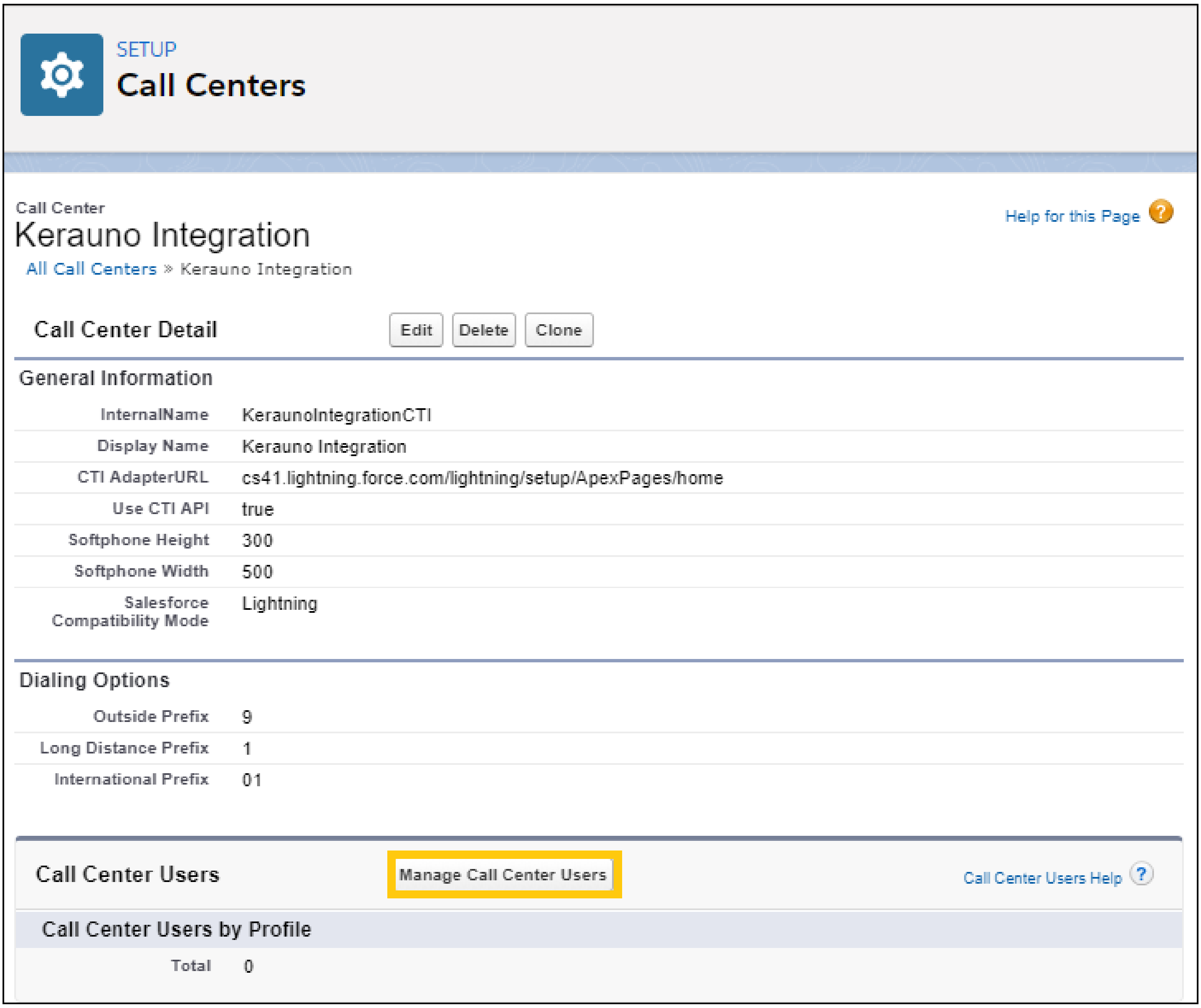
The Call Center Detail screen displays. Click **Edit**:



Remove the current content in the **CTI AdapterURL** field and paste the content with the **AdapterPage URL** that was copied in the Set up Call Center(s) section. Then click **Save**:

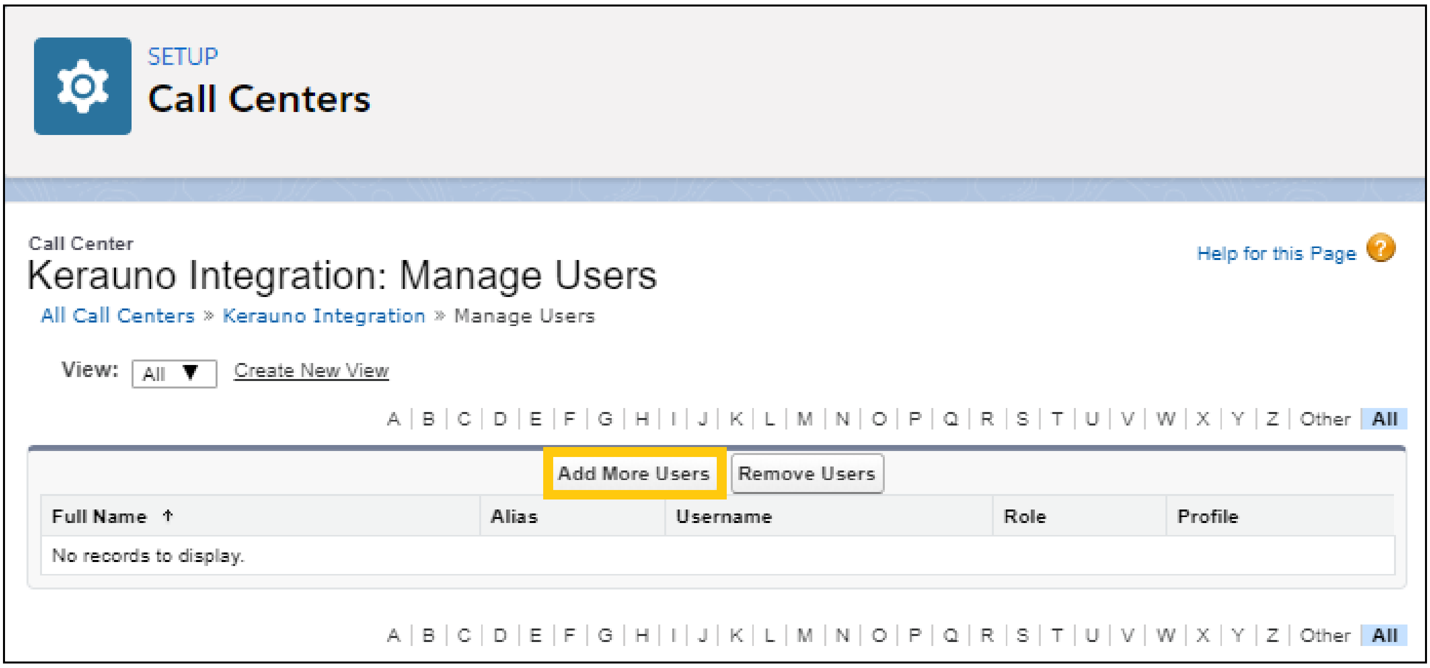


Click **Manage Call Center Users** to add users to the Call Center:

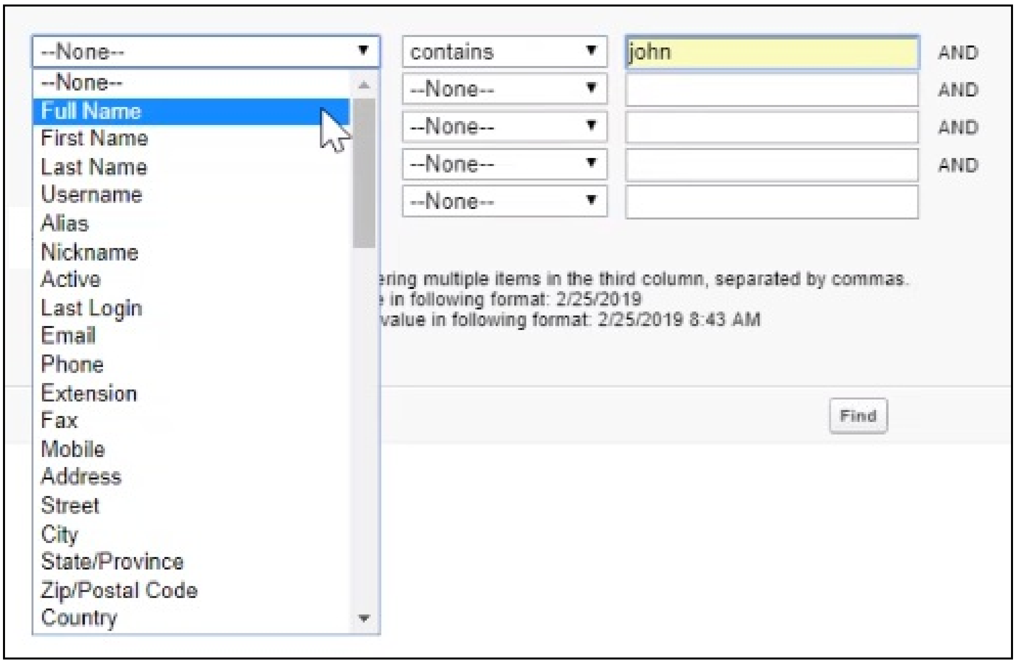


Click **Add More Users**:

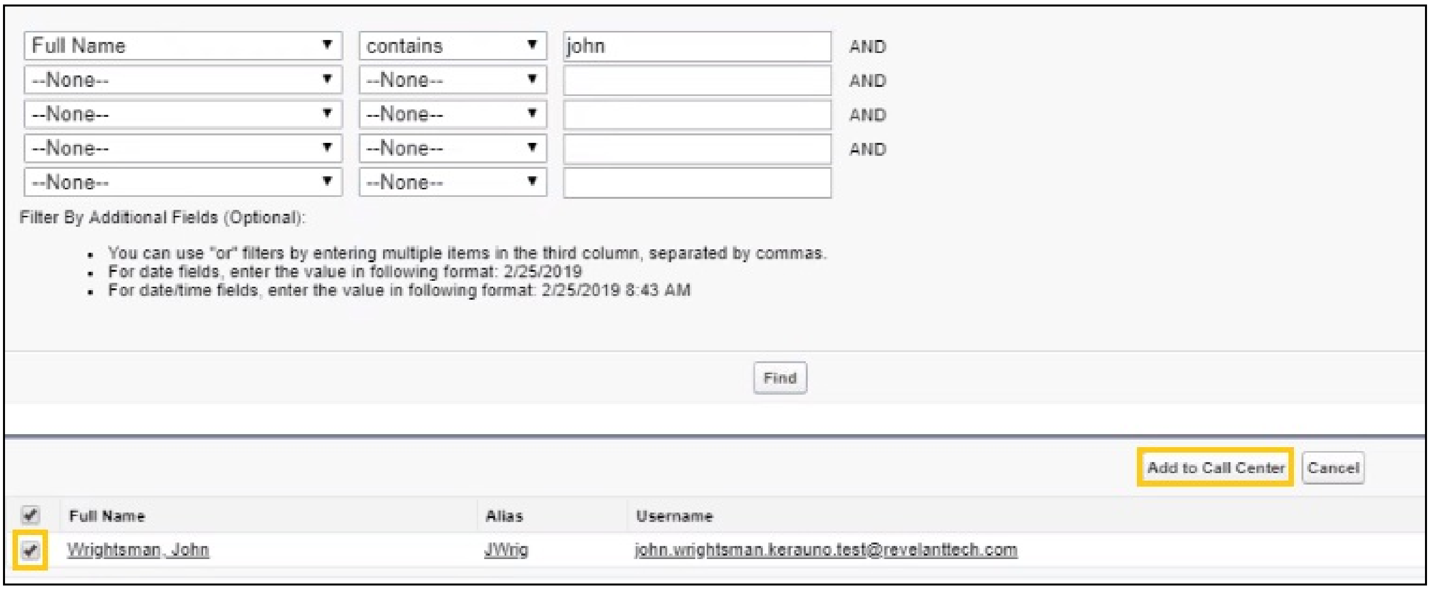
Note: A user can only be in one Salesforce Call Center at a time (not Lightning and Classic concurrently).



Use the search filters to identify additional users to add. Popular filters include Full, First, Last, and Username as shown below:

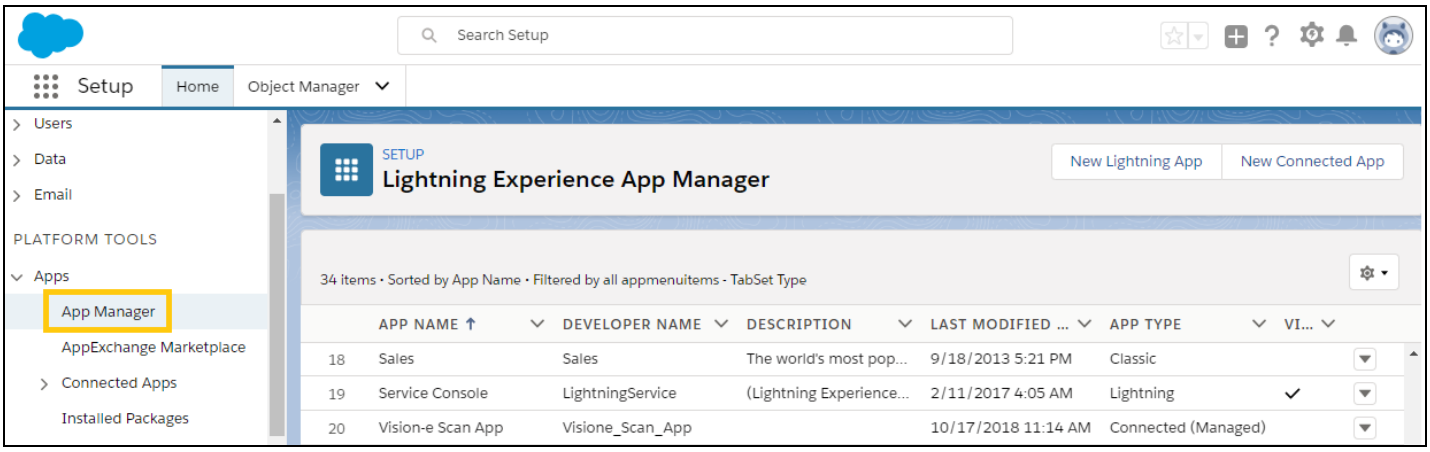


Click the checkbox for the appropriate user on the search results screen and click **Add to Call Center**:

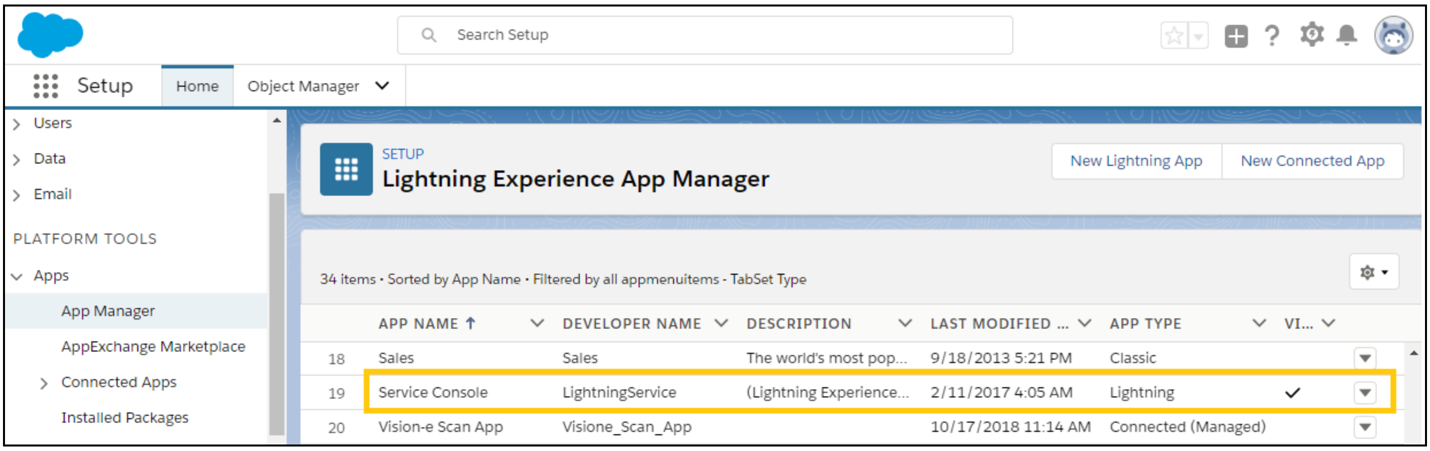


App Setting & Utility Enablement

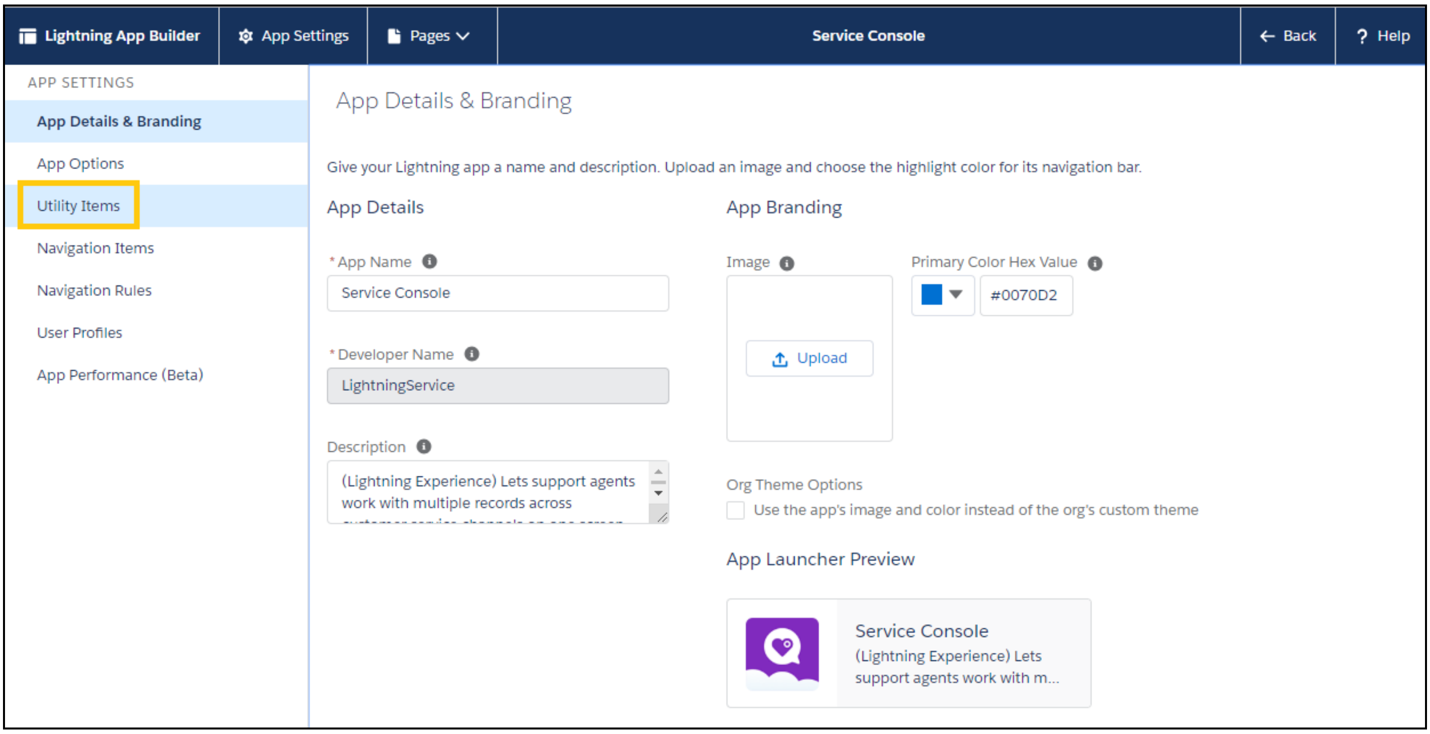
After installing the Managed Package, next configure the Salesforce App Setting and enable the Utility Item. Navigate to Setup > Home > Apps > App Manager:



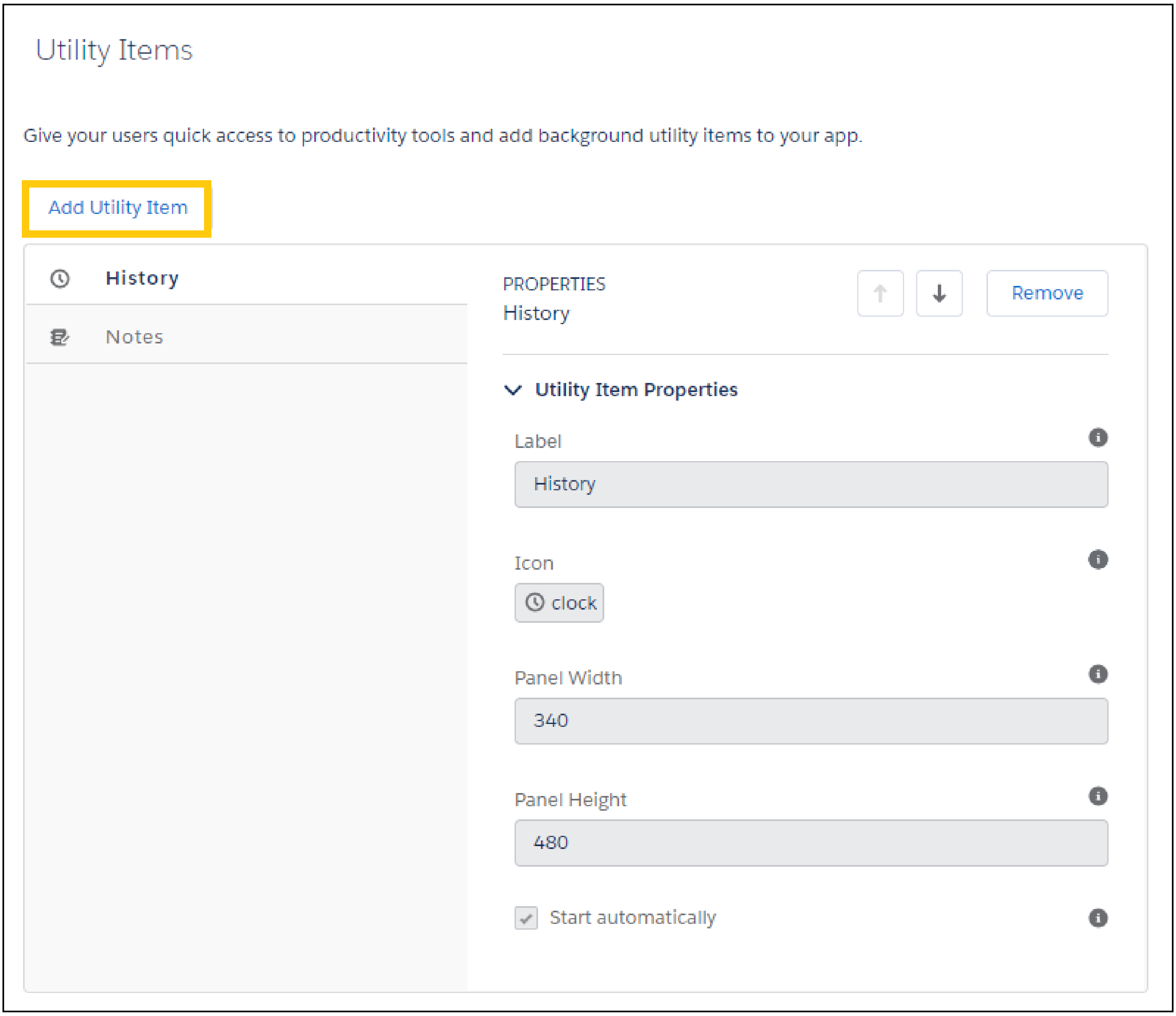
Identify the row containing the Service Console APP NAME with Lightning as the APP TYPE. Click the down arrow at the end of the row and select **Edit**:



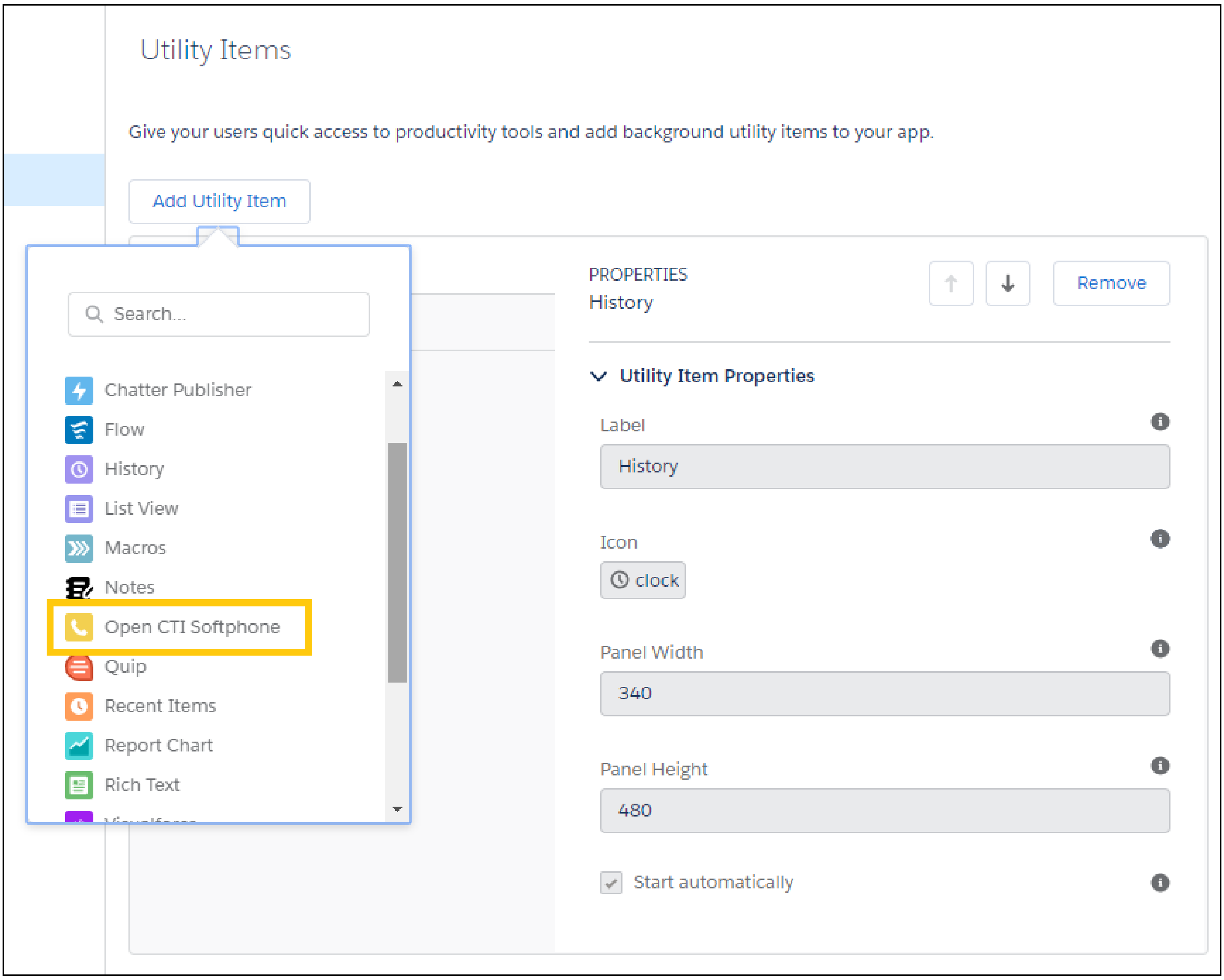
Click **Utility Items** on the resulting Lightning App Builder screen:



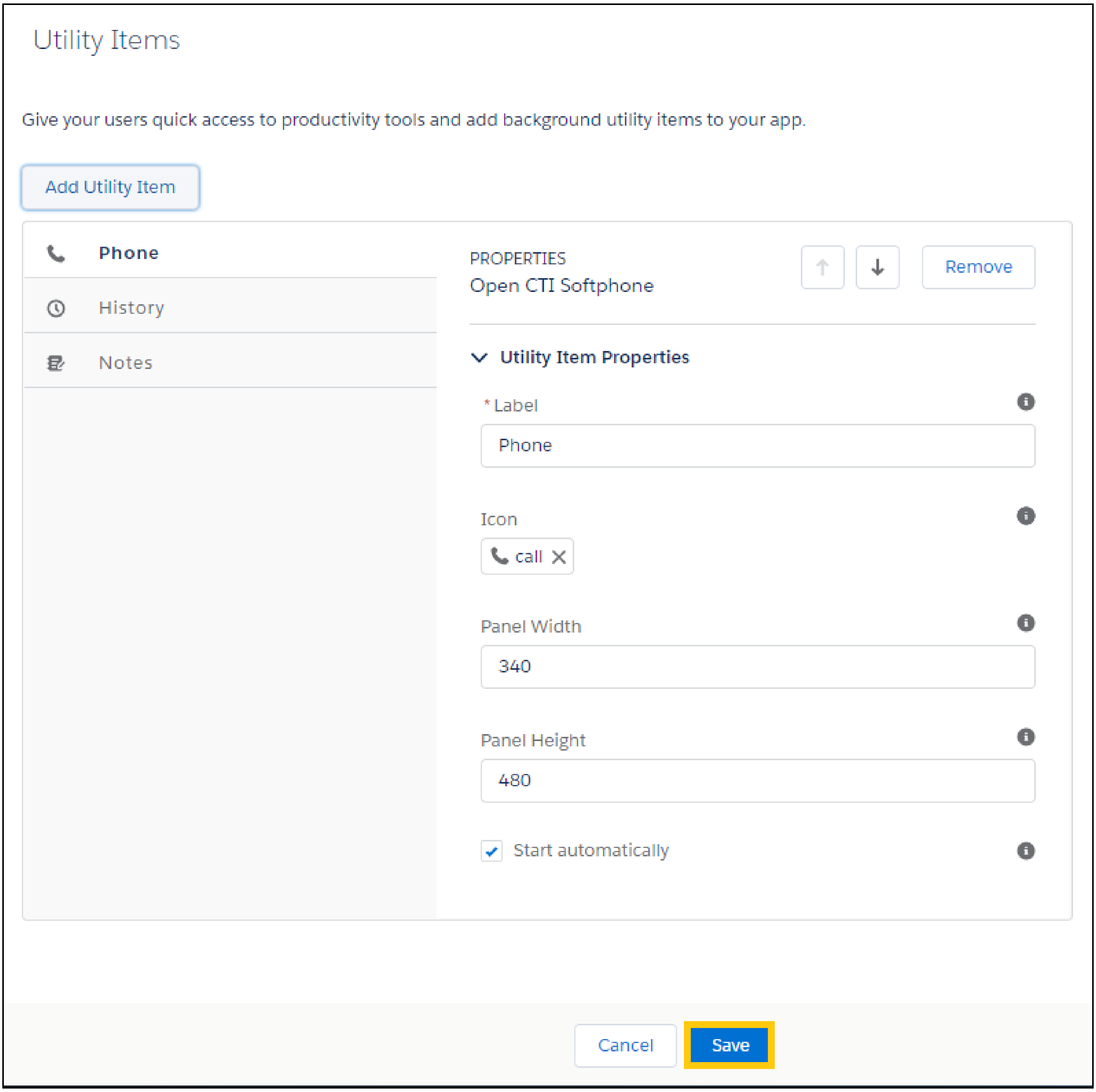
Click **Add Utility Item**:



Click **Open CTI Softphone**:



Click **Save** at the bottom of the screen. The Kerauno Managed Package with CTI Softphone is now installed.

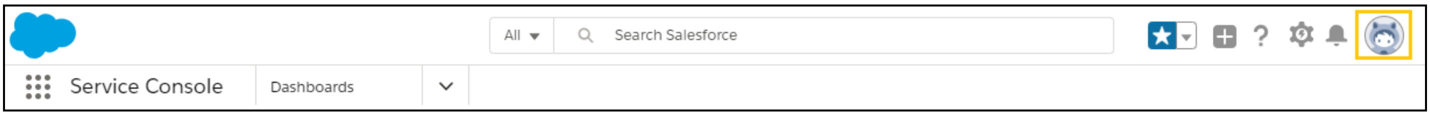


Retrieve Salesforce Token

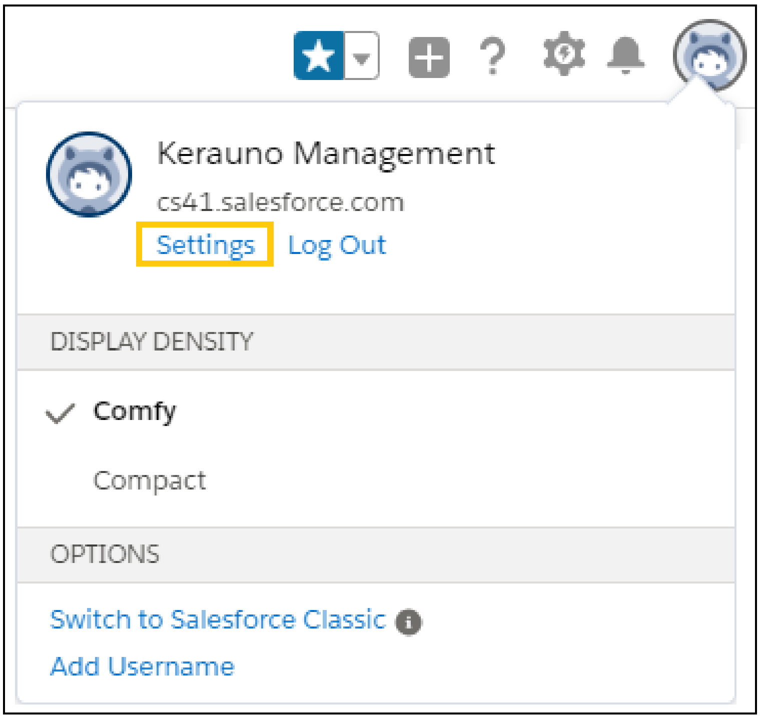
A Salesforce Admin account is required to retrieve a security token, which is required to access Salesforce via an API. The token itself is a case-sensitive code associated with your password.

Note: If you have a Salesforce token from installing other Salesforce software, skip these steps.

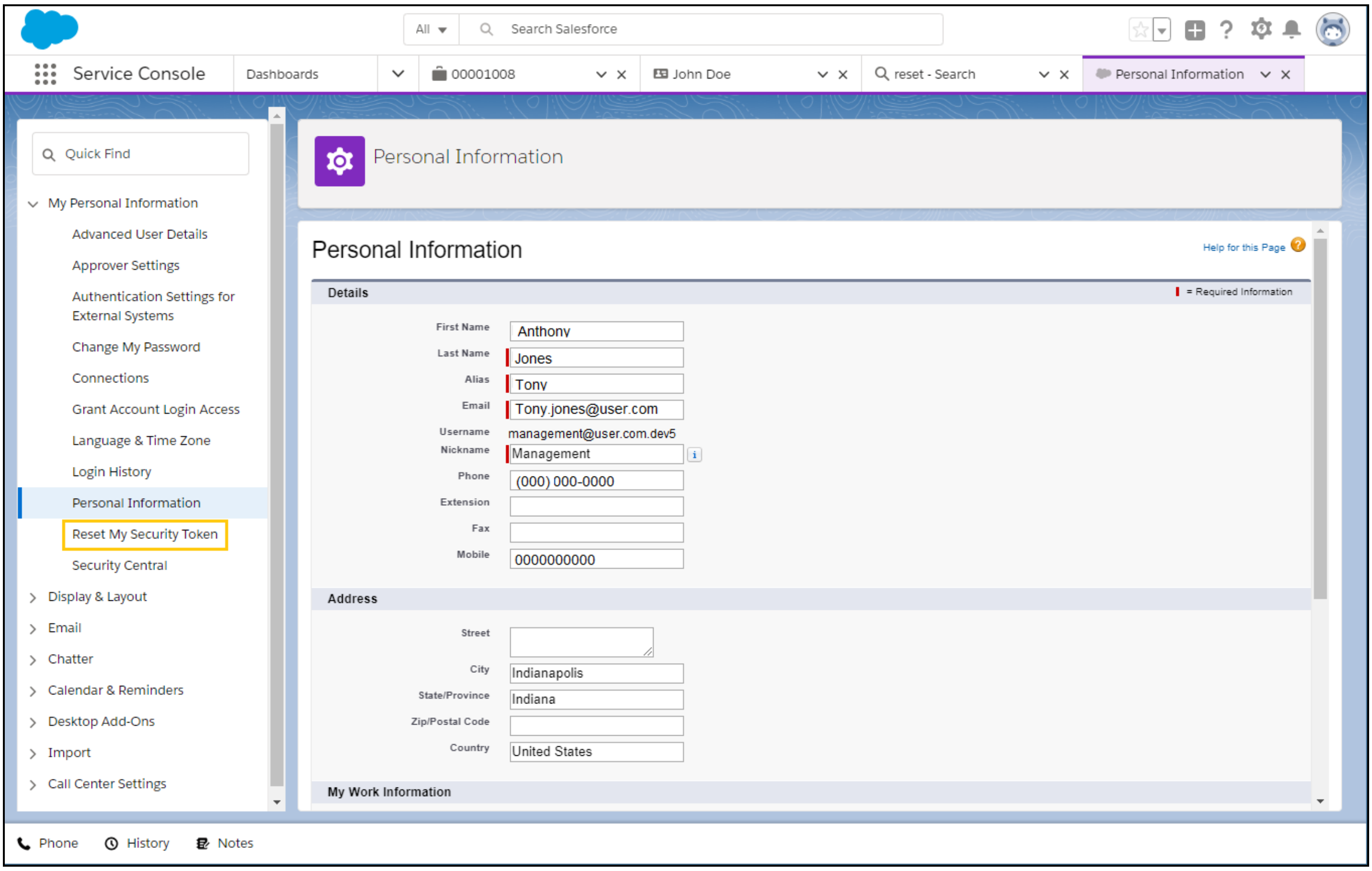
Click the **View Profile** icon on the top right of the screen:



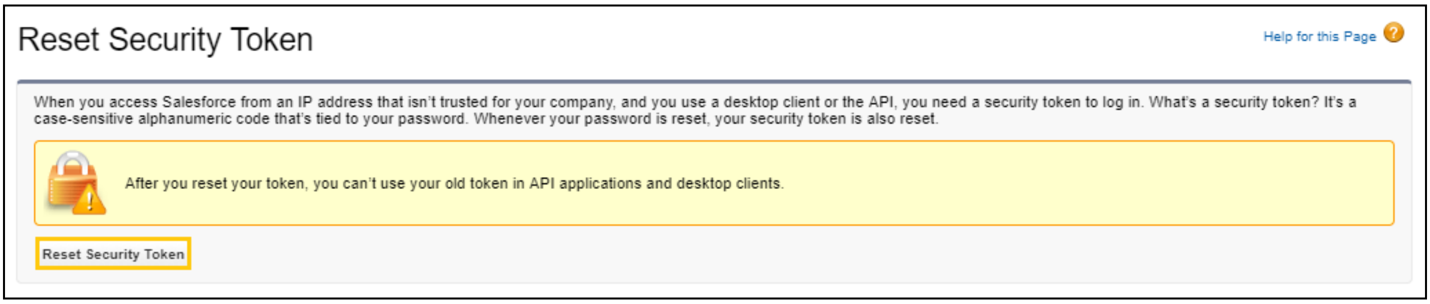
Click **Settings**:



Next select **Reset My Security Token** on the left side of the screen:



Click **Reset Salesforce Security Token**. The new token is sent to the email address associated with the account.

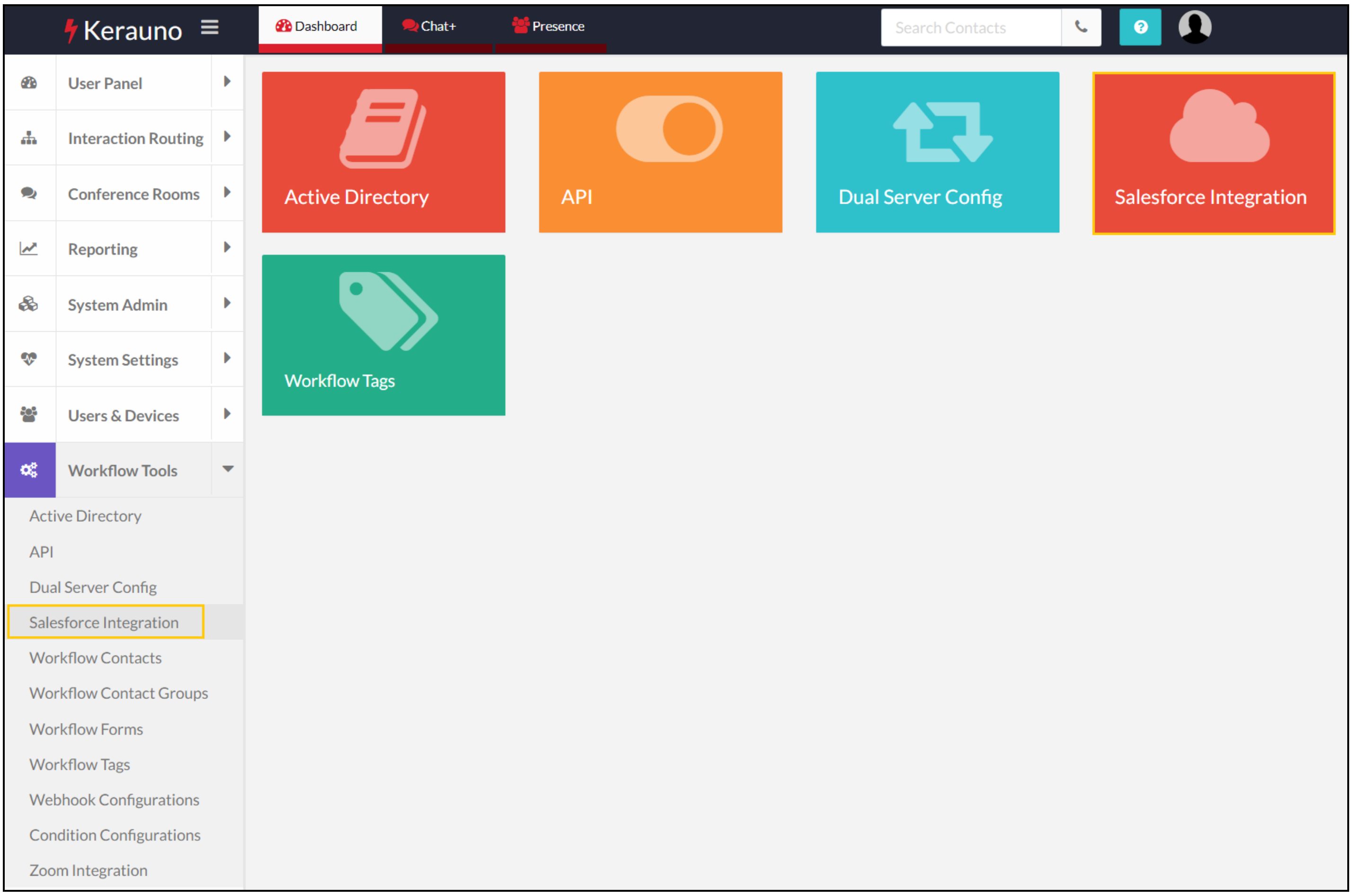


Notes: Salesforce recommends resetting the security token from a trusted network prior to accessing Salesforce from a new IP address.

Other applications may need to use this Security Token. Therefore, save the token in a secure location. If ever lost, repeat the steps above to update the Kerauno configuration.

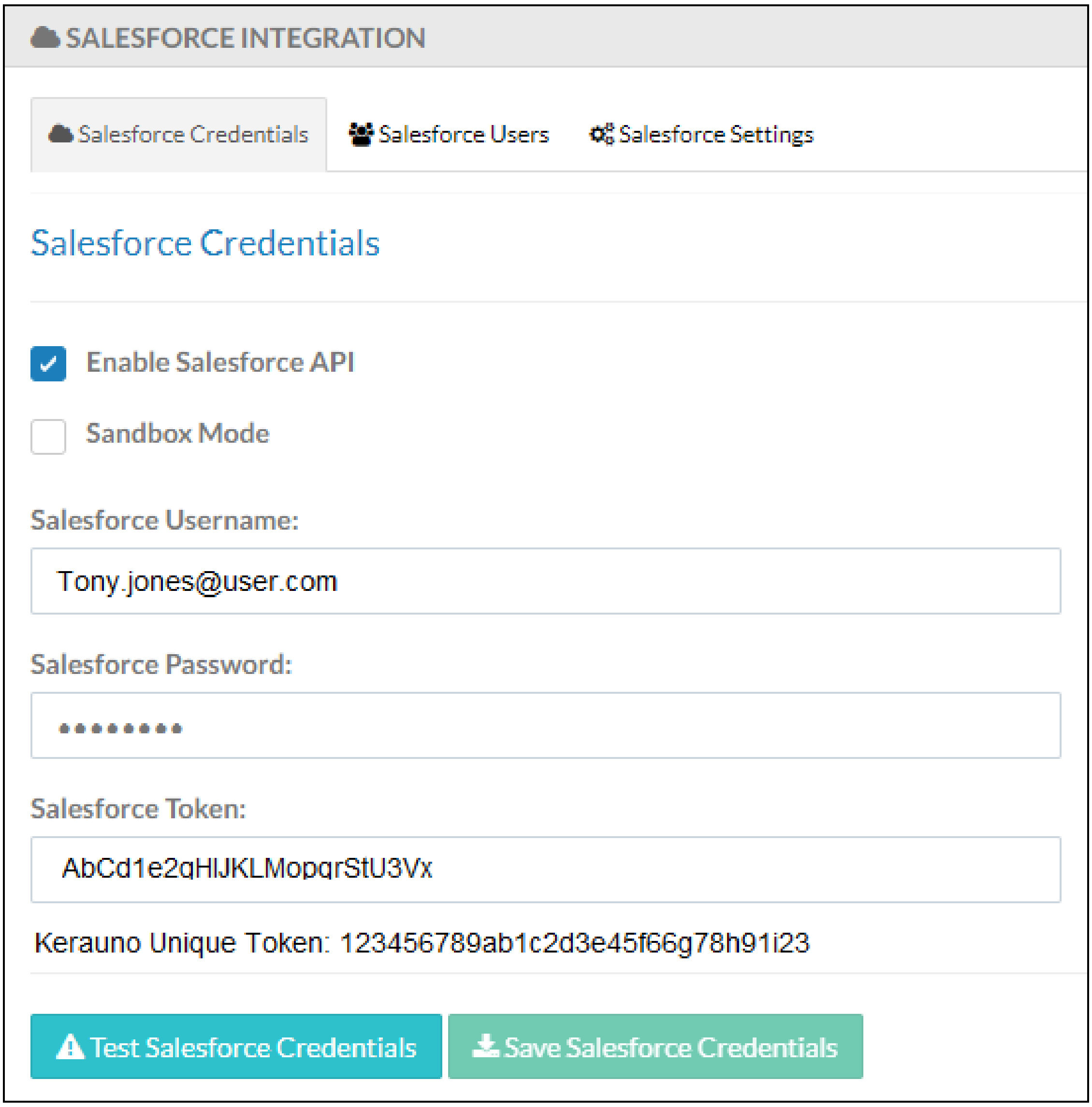
Configure Kerauno for Salesforce

The last step in the Salesforce for Kerauno integration is to configure the Kerauno settings. Log into Kerauno and navigate to Workflow Tools > Salesforce Integration:



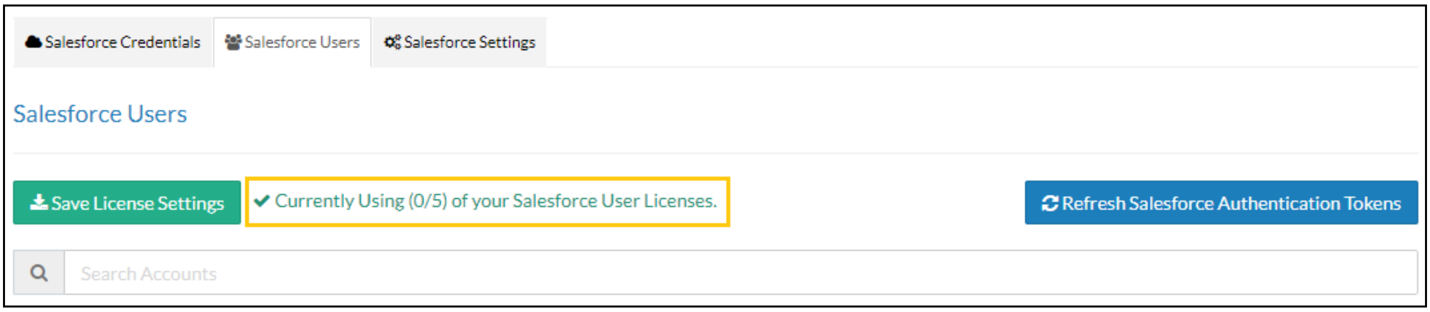
Salesforce Credentials Tab

- Click Enable Salesforce API checkbox.
- Click Sandbox Mode (recommended by Kerauno) checkbox.
- Populate the Salesforce Username and associated Password (must have000 Salesforce Administrator account credentials).
- Paste the Security Token from the email received.
- Click **Test Salesforce Credentials** to validate the credentials.
- Upon success, click **Save Salesforce Credentials**.



Salesforce Users Tab

The number of available Salesforce User Licenses displays at the top of the screen:

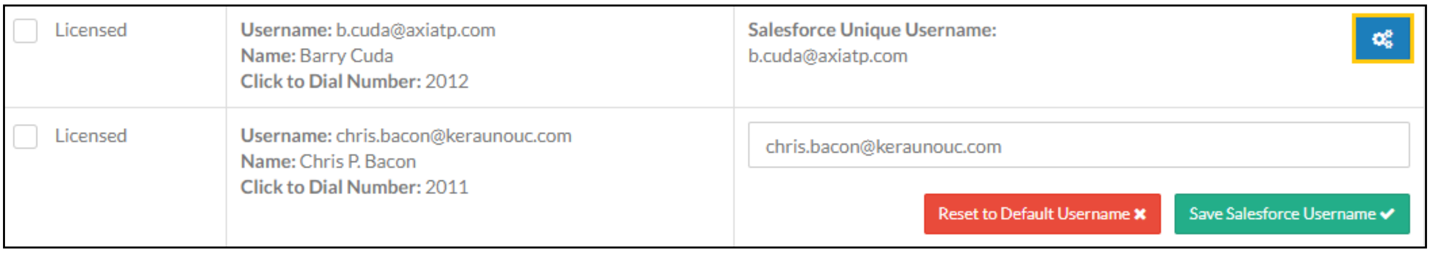


Best Practice: Before selecting users, click the cog icon to review the Salesforce Username and make any needed corrections. The Salesforce Unique Username in Kerauno must match the Salesforce Username in Salesforce.

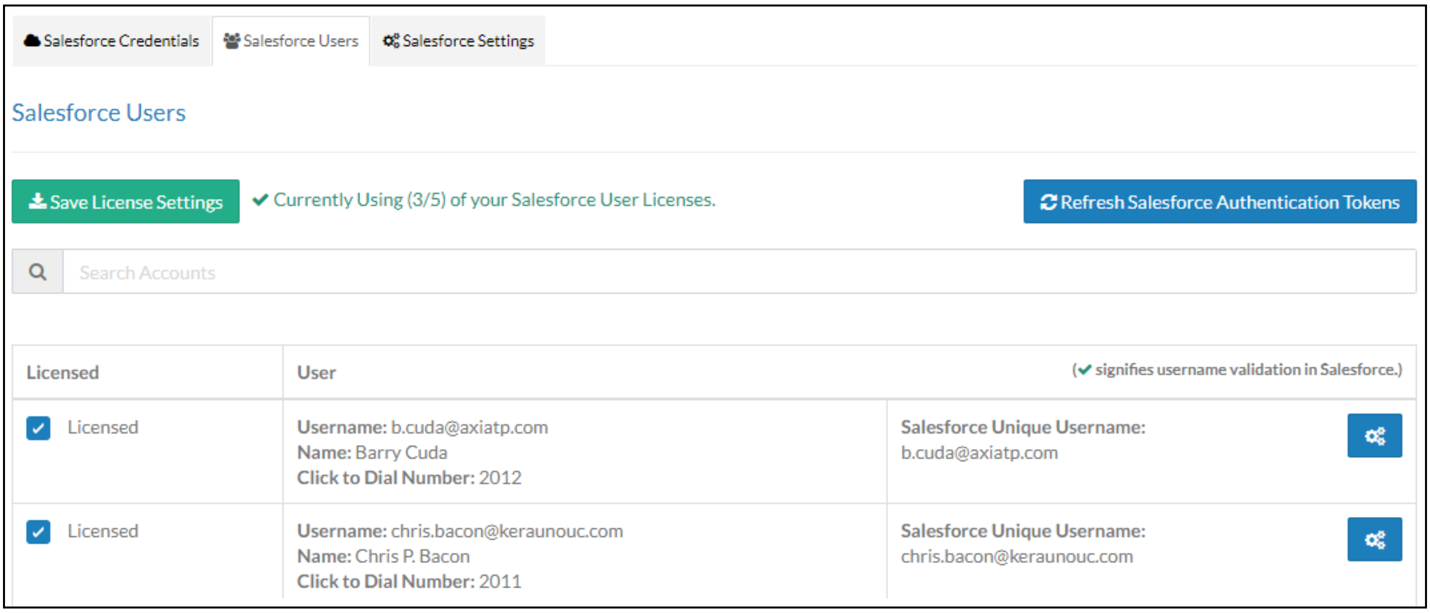
Example:

> Salesforce Username is john_doe_salesforce@example.com
>
> Kerauno email is john_doe@example.com
>
> Required action: Update the Salesforce Unique Username to john_doe_salesforce@example.com.

Click **Save Salesforce Username** anytime changes are made.



Apply check marks next to all licensed Kerauno users to include in the Salesforce Managed Package. Click **Save License Settings** when done.



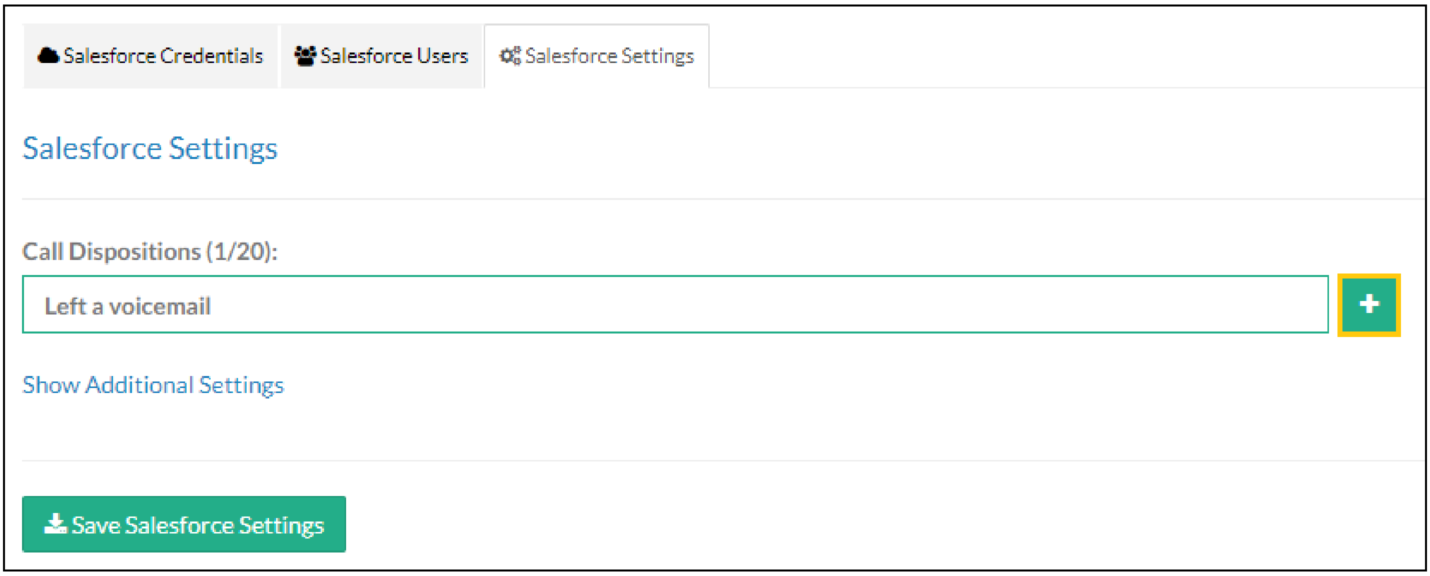
Salesforce Settings tab

An admin can add up to 20 Call Dispositions (call outcomes) that can be accessed and applied within the Salesforce integration.

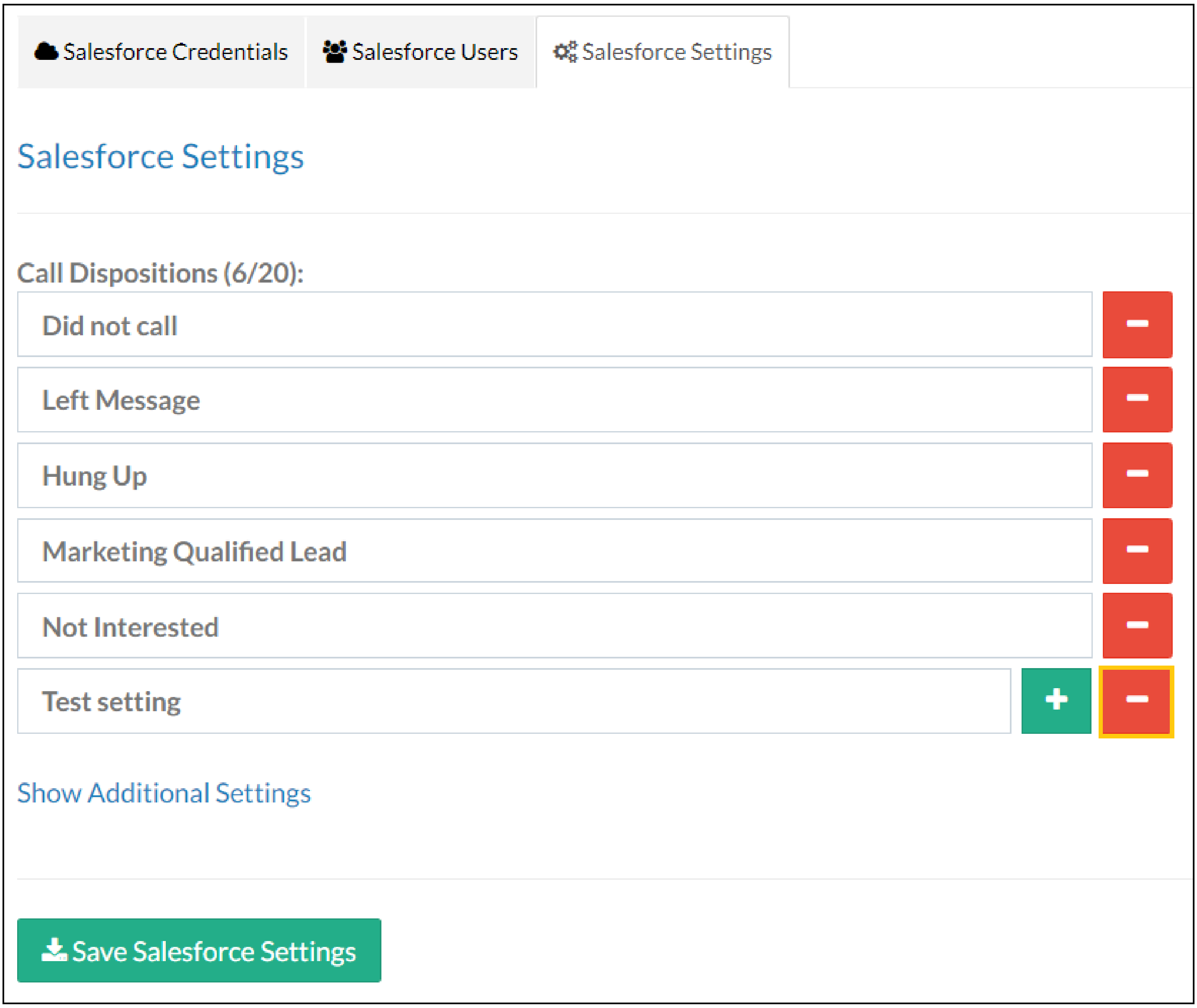
Example call dispositions can include, but are not limited to:

- Qualified lead
- Left a voicemail
- Did not call
- Not interested

To add a new disposition, start typing in the open field and click the plus (+) sign when done:



Click the negative (-) sign to remove an active Call Disposition:



User Getting Started Kit

Last Modified on 11/13/2019 1:21 pm EST

Using the credentials provided by your employer, log into Kerauno UCaaS. Complete the following steps to start using Kerauno UCaaS right away.

Step 1: Explore Dashboard View & User Panel

Familiarize yourself with the Dashboard where the majority of activity occurs. The Dashboard provides a snapshot view of the major components of Kerauno.

Step 2: Personalize Settings & Options

Record custom Voicemail greetings and enable Find Me from the Dashboard.

Step 3: Check out Chat+

Click Chat+ to see where chat and SMS messages are managed. Send your first Chat+ message! Learn more about using SMS .

Step 4: Customize Presence Dashboards

Access Presence to sign into corresponding Ring Groups, manage calls, and customize Dashboards to streamline your daily activities.

User Panel Overview

Last Modified on 11/13/2019 3:29 pm EST

The **User Panel** is the first screen users see when they log into Kerauno. This page contains a quick overview of the user's profile settings, at a glance call statistics and records, as well as shortcuts to reach other pages of the user panel.

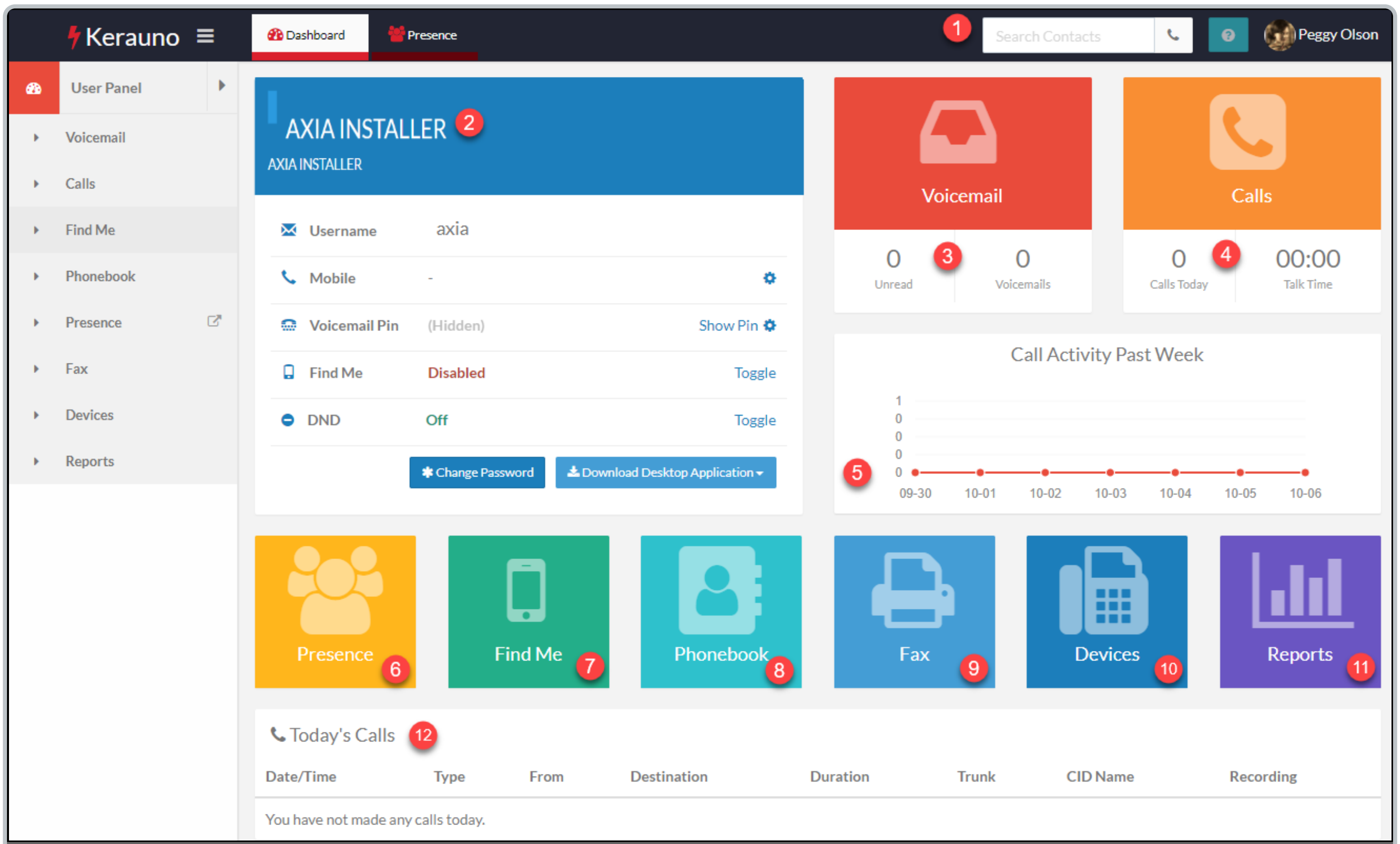


Figure 01: User Panel

Items located on this page include:

1. **Search Bar:** Search for any user by name or telephone number. Users and outside telephone numbers may be entered and dialed by selecting the button.
2. **Profile:** Contains all user information as well as a **Change Password** button.
3. **Voicemail:** Links to the **Visual Voicemail** interface and shows the number of unread voicemails.
4. **Calls:** Links to **Call Records** and displays today's indicators of calls taken and total talk time.
5. **Call History:** Displays a visual representation of inbound/outbound calls for the

past seven (7) days

6. **Kerauno Presence:** Links to Kerauno Presence Desktop Call Control Software.
7. **Find Me (Find Me Follow Me):** Allows users to establish call forwarding to a mobile device.
8. **Phonebook:** Contains all users and corresponding extensions and department information.
9. **Fax:** Links to the Fax Panel where users send and receive faxes.
10. **Devices:** Allows users to view their extensions and set configurable keys on their phones.
11. **Reports:** Scheduled **Call Reports** and **Analytics Reports** display in this section.
12. **Today's Calls:** History of a call including time, duration, parties involved, and recordings.

Search Bar

The **Search Bar** is located in the upper-right side of the screen and allows users to enter either a name or telephone number to search for. Names will be searched against all extensions currently built into the system to find a match.

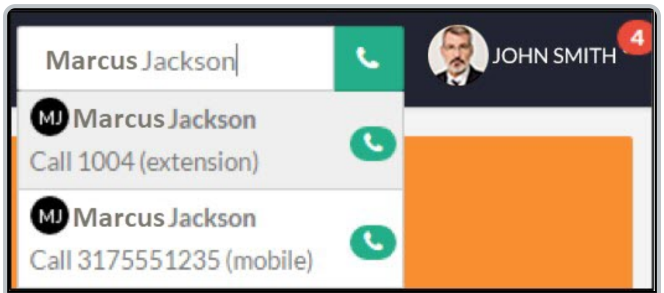


Figure 02: Search Bar Search Results

When a match is found, the searched party's extensions will be shown as well as their mobile number if one is configured. Clicking on any extension or mobile number will initiate a call from the user's primary extension.

In the example Figure 02 above, “Marcus Jackson” returns both a main extension (1004) and one mobile number (3175551235). Clicking the green symbol next to either entry will initiate a call to that number. When you initiate a call from the **User Panel**, the call will ring to your desk phone or main extension. When you pick up that call, the phone will be ringing the number dialed via the **User Panel**.

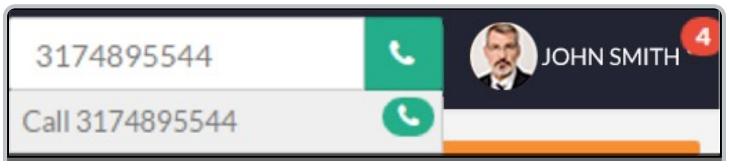


Figure 03: Search Results Example

NOTE:	Any 10-digit, 1-800, or international number may also be dialed by using the search bar as in the example above. Any numbers dialed in this manner should be entered with no hyphens, periods, or spaces. If calling a long list of numbers, this method is much quicker than dialing using the physical phone handset.

Profile

On the far-left of the **User Panel** is the **User Profile** containing general information about the user.

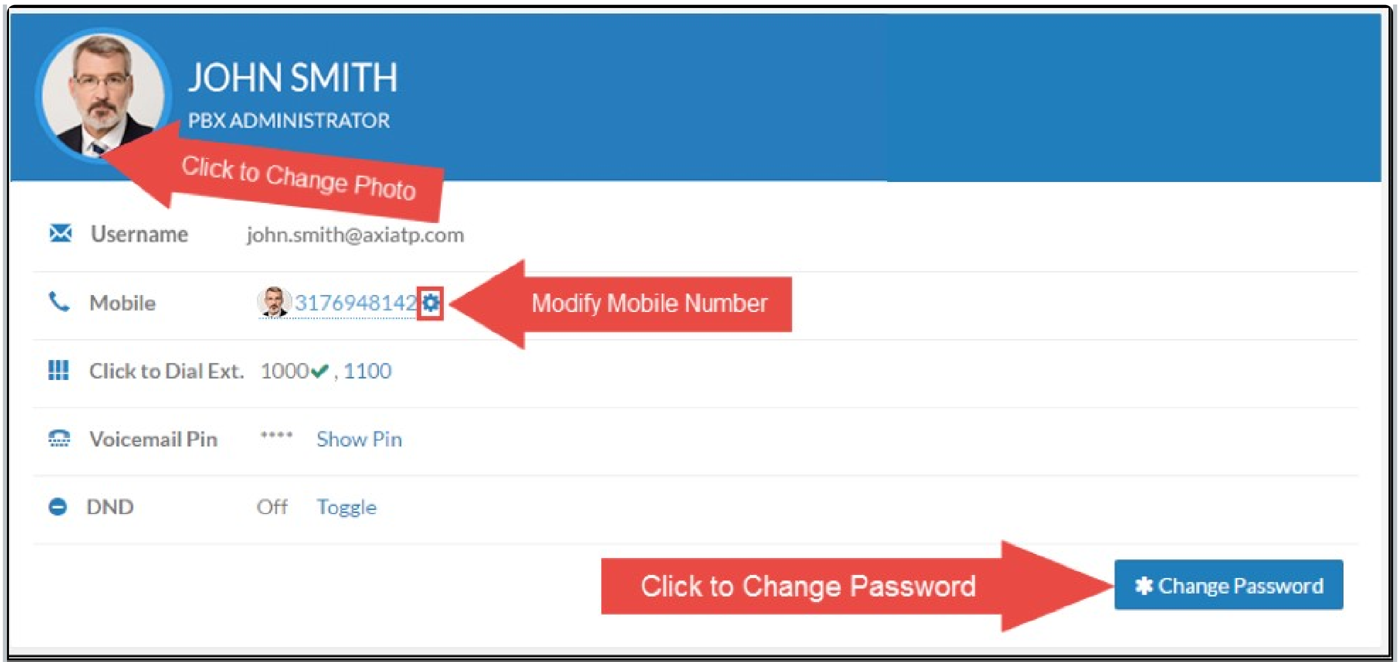


Figure 04: User Profile

At the top of the **User Profile**, the user's name and job title are displayed, along with his/her profile photo. To change a profile photo, click the existing photo and upload a new .JPEG file.

- **Username:** This is the name assigned to the profile and is typically the user's email. This username is what is used to log into the **User Panel**.
- **Mobile:** The user's mobile number is listed here. Clicking the symbol allows a new number to be entered.
- **Click to Dial Ext:** This section lists extension(s) assigned to the user. A user may have multiple extensions, for example, an office desk phone, a home office phone, and a soft phone on their PC.
- **Voicemail Pin:** This personal Identification Number (PIN) used to access the user's mailbox via a handset. Click the **Show/Hide pin** button to hide/display the user's voicemail pin number.
- **DND (or Do Not Disturb):** Allows a user to ignore incoming calls on all of his/her extensions. If **DND** is enabled, incoming calls are automatically sent to voicemail.

At the bottom of the **Profile** section of the **User Panel**, there is a blue **Change Password** button with which the user can change his or her password. Pressing the **Change Password** button will display a prompt for the user to enter their old password, enter a new password, and to confirm the new password.

Passwords must be a minimum of eight (8) characters. It is highly recommended that user passwords include symbols and numbers in addition to uppercase/lowercase text and that passwords are changed at least once every 30 days.

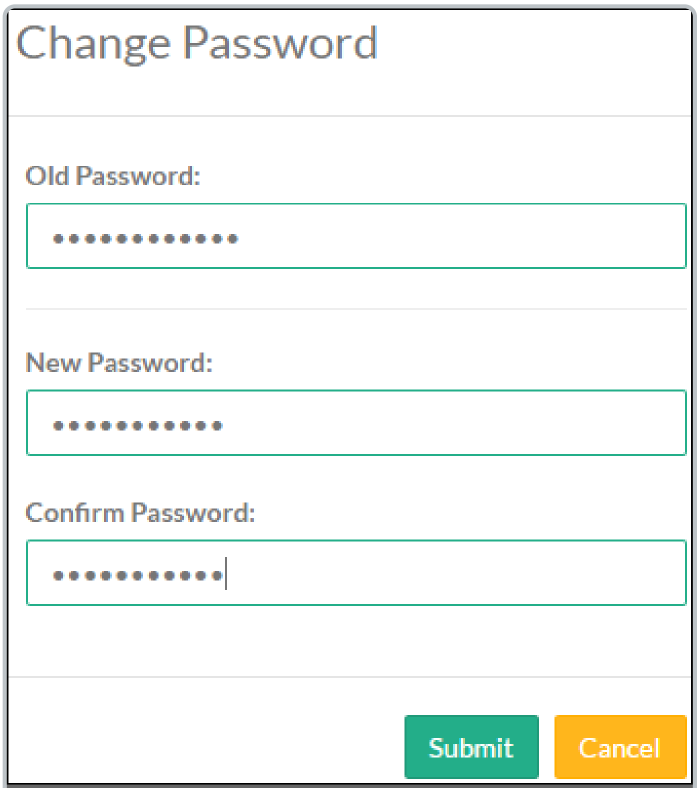


Figure 05: Password Change Screen

Voicemail

Last Modified on 11/20/2019 12:46 pm EST

Voicemail Quick Reference Guide

The voicemail dashboard allows users to customize and manage voicemail without dialing into a physical phone.

From the Kerauno homepage, the red **Voicemail** icon displays the number of unread messages as well as the total number of voicemail messages currently in the user's voicemail box.

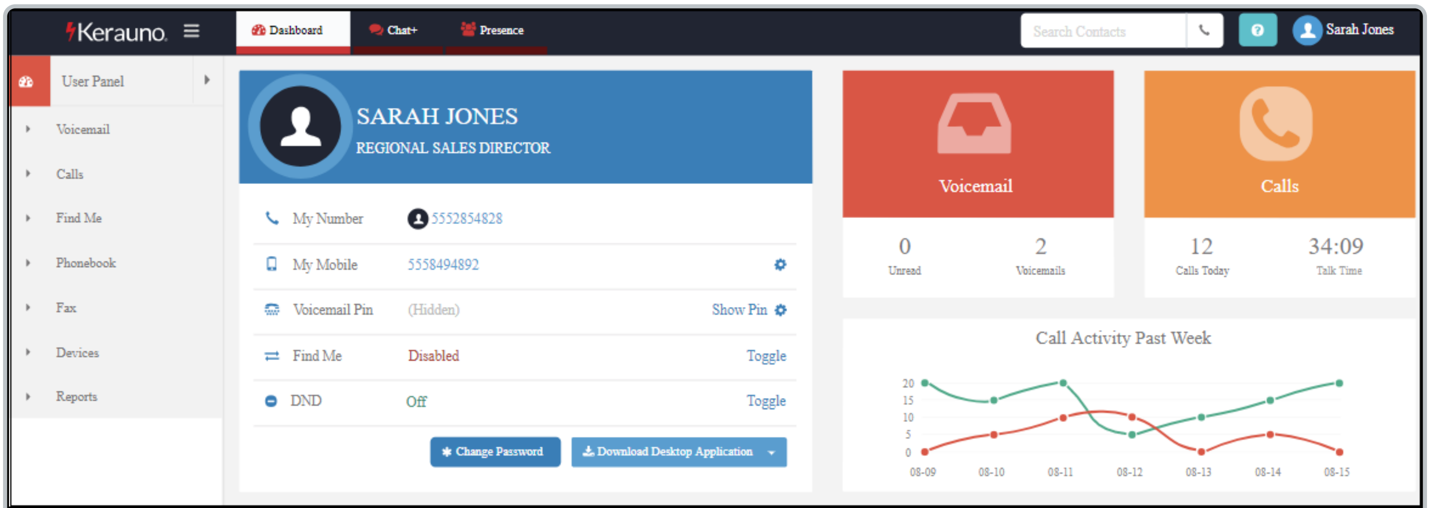


Figure 01: Voicemail Shortcut on Dashboard

You can also access voicemail from the **Voicemail** button in the User Panel on the left side of the screen.

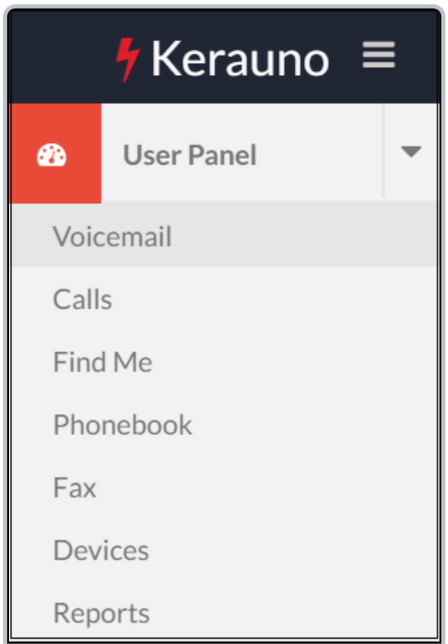


Figure 02: Voicemail Tab in User Panel

There are three tabs on this page: **Inbox**, **Voicemail Configuration**, and **Voicemail Greetings**.

Inbox Tab

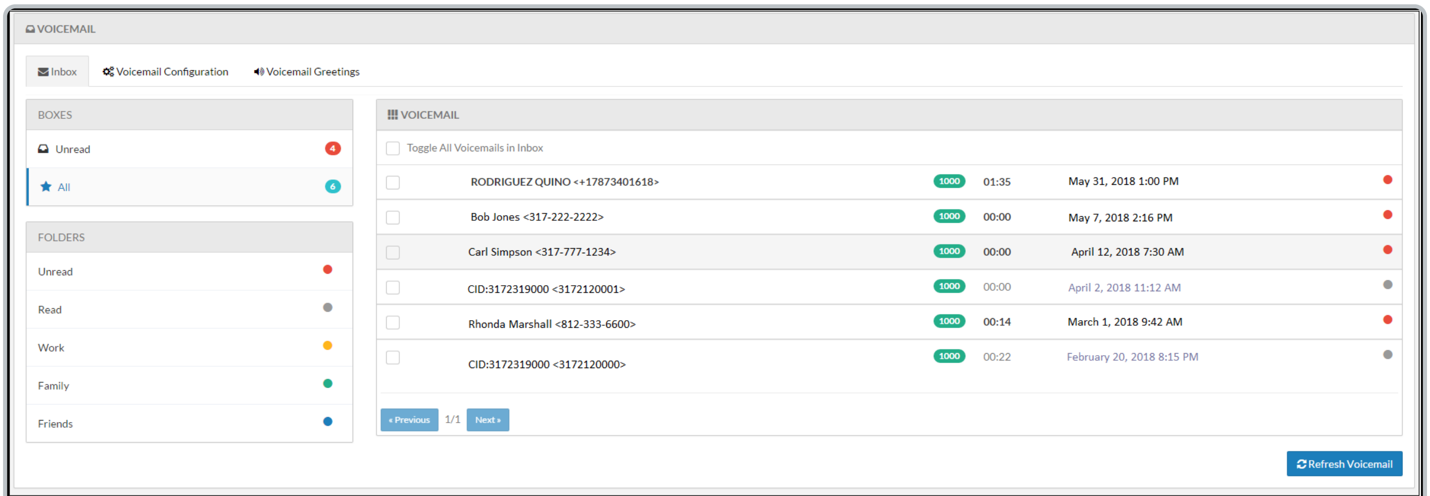


Figure 03: Voicemail Inbox

The **Refresh Voicemail** button is used to reload the page and check the mailbox for additional messages.

On the left side of the *Voicemail* page both the **Boxes** and **Label** menus are shown. The **Boxes** menu shows the number of total and unread voicemail messages in the associated user's mailbox. The **Label** menu shows color-coded categories users may use to segment their voicemail box.

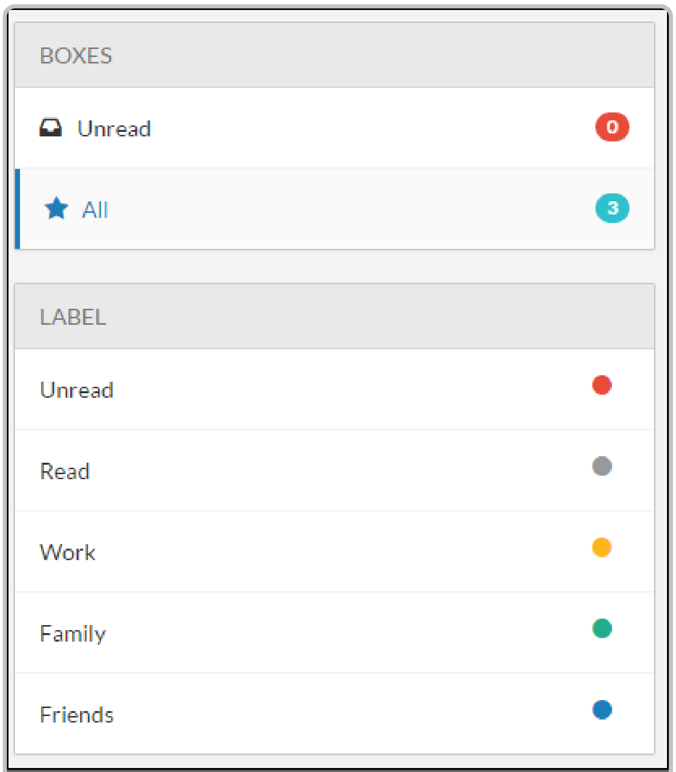


Figure 04: Voicemail Boxes & Labels

All items in both the **Boxes** and **Label** menus are selectable and act as filters for the **Voicemail** display section on the right side of the page. For example, selecting the orange **Work** label in the **Label** menu will show only messages that the user has characterized as work voicemail messages.

On the right side of the voicemail page, all current voicemail messages are listed and display the following data:

- Caller name (if recorded in the Phonebook)
- Callback/Caller ID number
- Duration of message
- Time of message
- Color-coded category of message

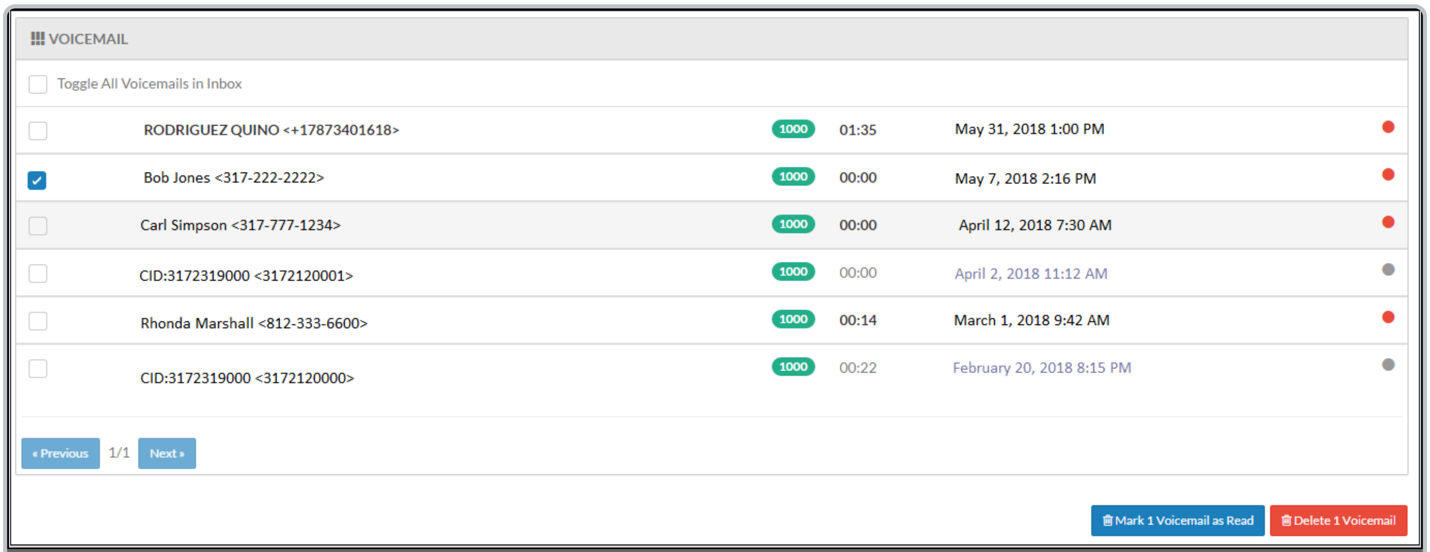


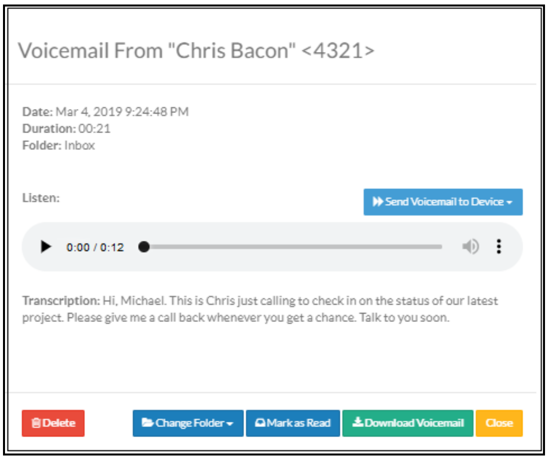
Figure 05: Manage Messages

Use the **Toggle All Voicemails in Inbox** checkbox on the far left of available messages to manage all at the same time. Once toggled, select either the **Delete** or **Marked as Read** button in the lower-right corner of the screen. To manage messages individually, select the checkbox to the left of the individual message.

Voicemail Transcription - Available on 3.1 and higher, excluding premise enterprise customers

Similar to smart phone voicemail being transcribed by mobile carriers, Kerauno offers voicemail transcription. Audio messages are captured, transcribed, and then routed as text to the user via email generally within a few minutes depending on the length of each message.

Transcribed voicemails are shown in the user interface:



If a transcription is not received within 10 minutes, the user is contacted via email. The message audio is available for the user, even if the transcription is not. If a voicemail fails to transcribe, first check that voicemail transcription is enabled in the user record. If the transcription is not delivered after 10 minutes, contact your partner for support.

Messages with no audio content or less than five seconds are not transcribed.

Notes: Voicemail transcription is not Health Insurance Portability and Accountability Act (HIPAA) of 1996 compliant. For that reason, transcription must be manually added for users. Voicemail transcription is enabled by Administrators.

Individual Voicemail Options

Clicking on a voicemail object from the **Voicemail** menu opens a pop-up window with additional options. The **Listen** section allows the user to play voicemail messages within their browser by selecting the **Play** icon in the embedded media player. The voicemail plays over local speakers or headphones.

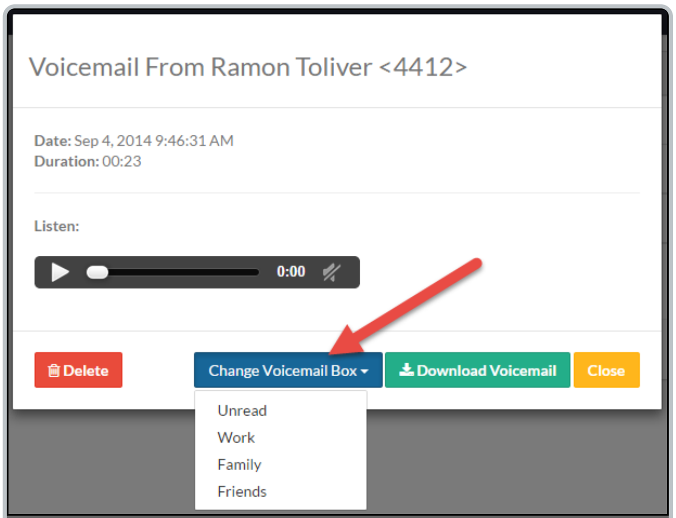


Figure 06: Voicemail Options

The green **Download Voicemail** button downloads the file directly from the phone system onto a local hard drive. Clicking this button prompts the user to name the file and select a location to save it. All voicemail messages download in .MP3 format, and can be played with most media software such as Windows Media Player, VLC, or QuickTime.

Voicemail Configuration Tab

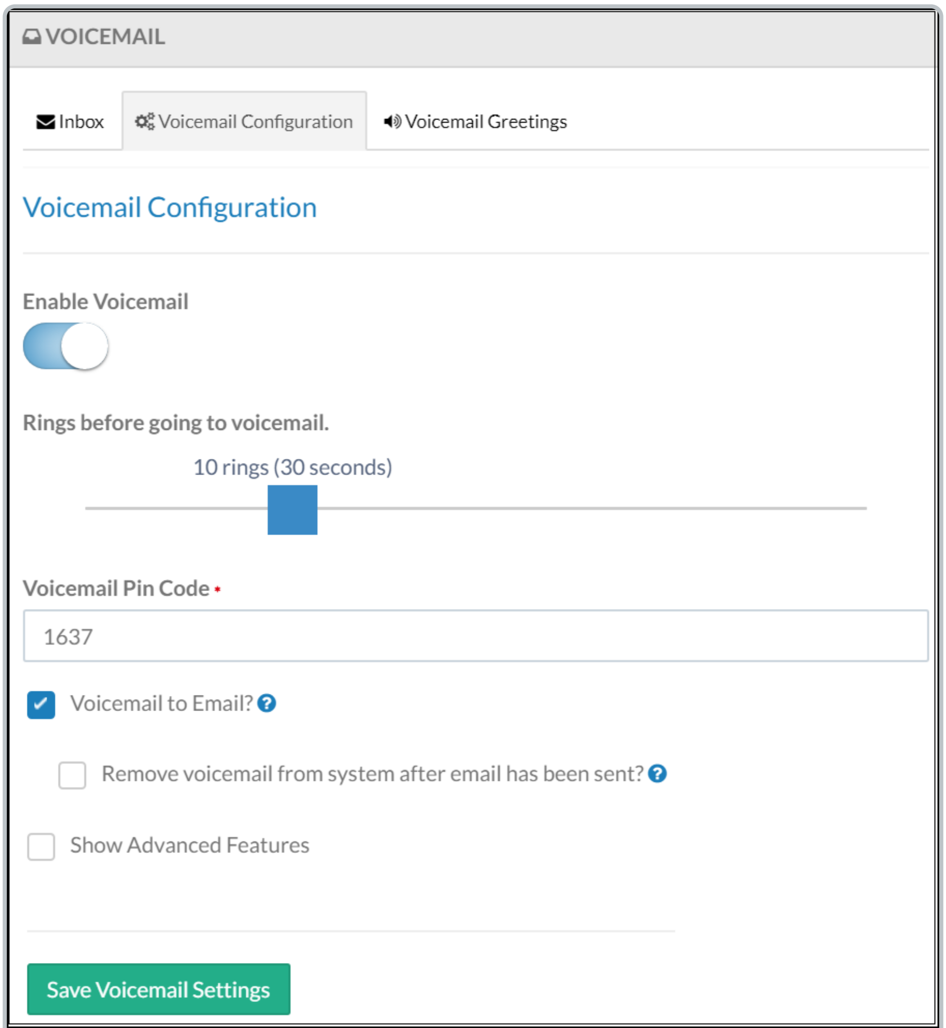


Figure 07: Voicemail Configuration

This tab allows users to configure and manage voicemail box settings including:

Enable Voicemail: Enable/disable voicemail slider. When disabled, calls terminate after no answer as voicemail is not configured to accept messages. When voicemail is enabled, adjust the **Rings before going to voicemail** slider to set the number of rings before routing a call to voicemail.

Voicemail Pin Code: Establish or edit a 4-digit pin code to access a voicemail box.

Voicemail to Email?: Converts voicemail messages to email; automatically sending all voicemail details and an audio attachment to the user’s email address. Users can also open the Voicemail panel, select a voicemail, and forward it or download accordingly.

Remove voicemail from system after email has been sent?: When active, voicemails are deleted from the mailbox after the voicemail is sent to email. This setting is helpful to keep messages under the 100 message maximum limit.

Show Advanced Features: Click this checkbox to show additional voicemail settings.

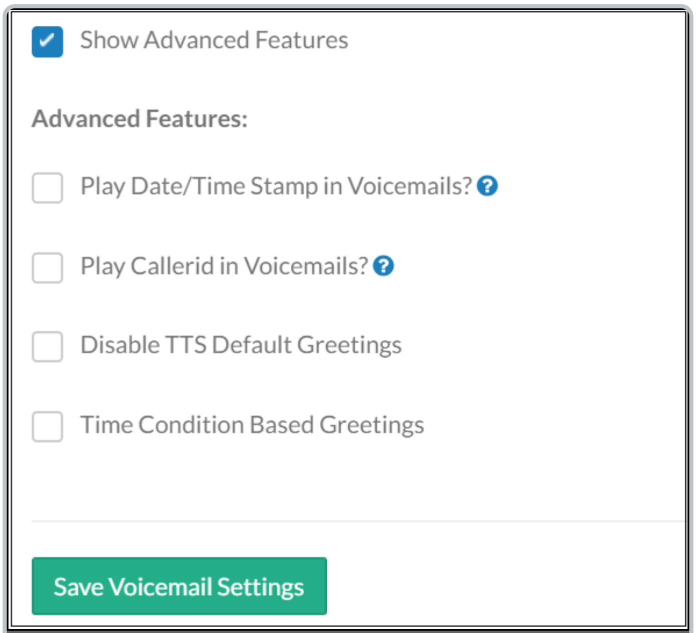


Figure 08: Advanced Features

Play Date/Time Stamp?: Message playback includes the date/time stamp information.

Play Caller ID?: Message playback includes the caller’s inbound caller ID number.

Disable TTS Default Greetings:

Time Condition Based Greetings: Establish custom messages to play based on the day of the week and time of day when a call is received.

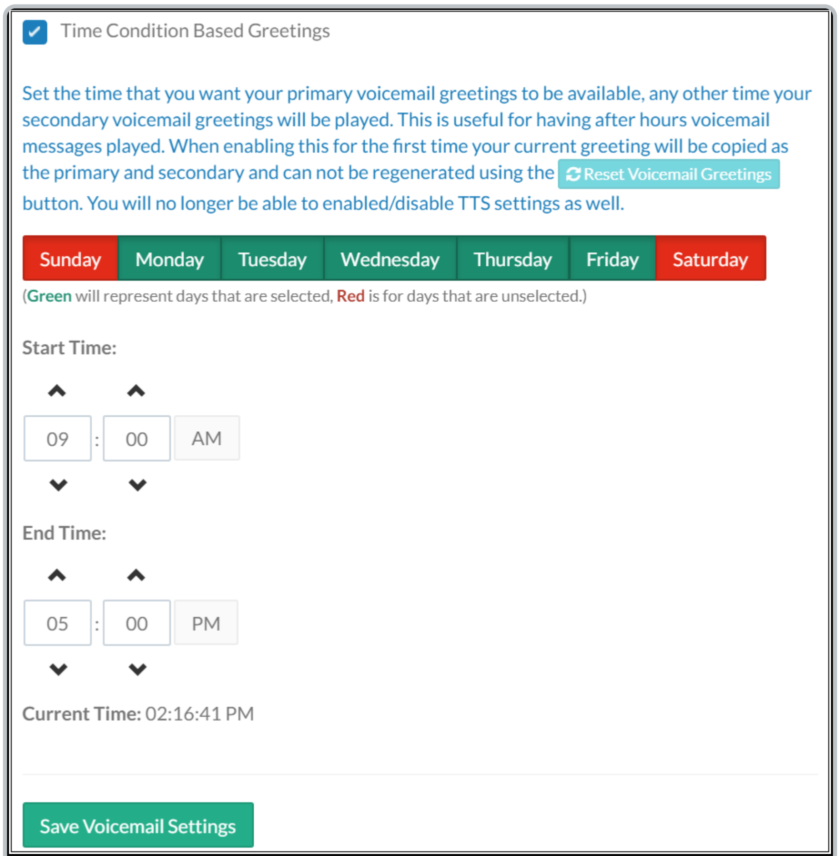
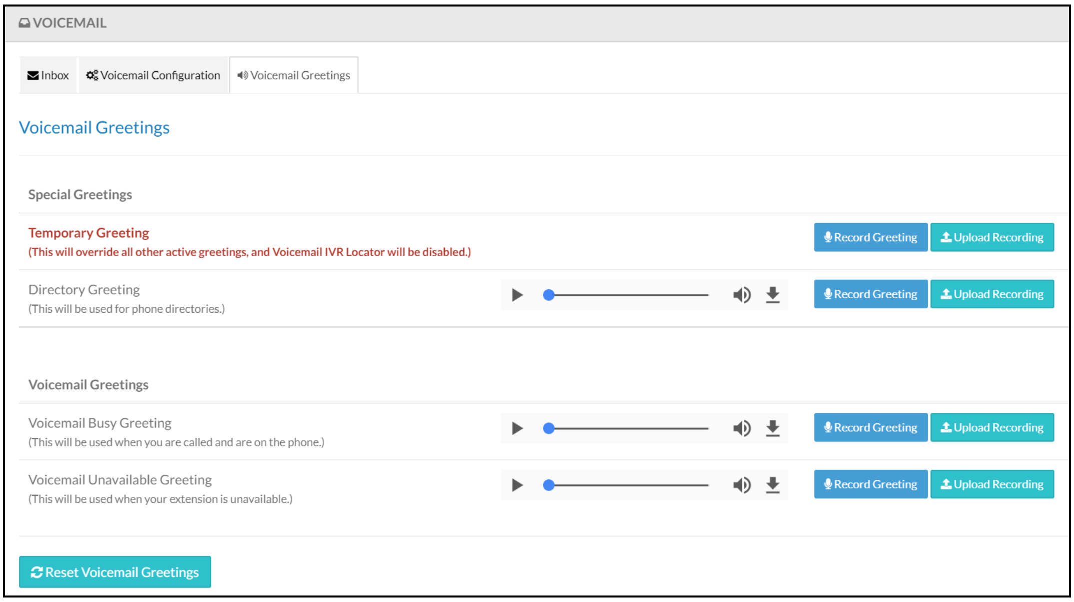


Figure 09: Time Condition Based Greetings

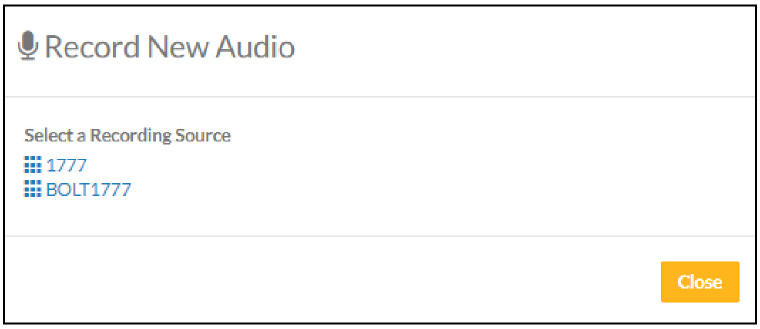
Voicemail Greetings Tab

Use the provided Recording option buttons for each Greeting Type. To record a new greeting, press the **Record Greeting** or **Upload Recording** button. When adding a new greeting, record in a quiet location and review the recording prior to saving.

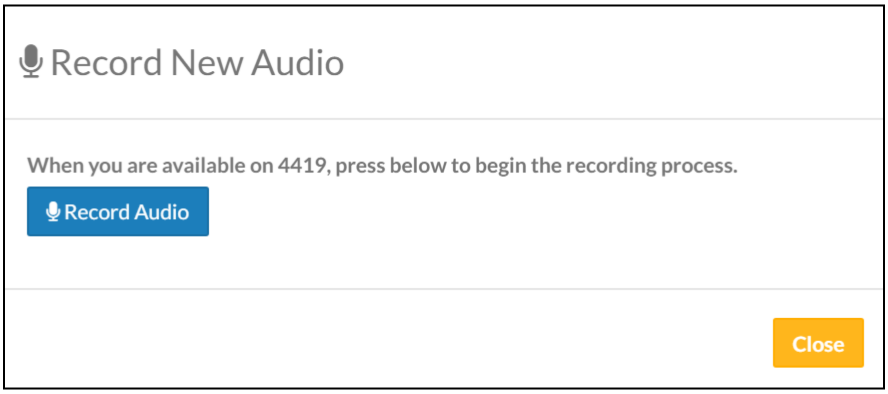


Record Greetings

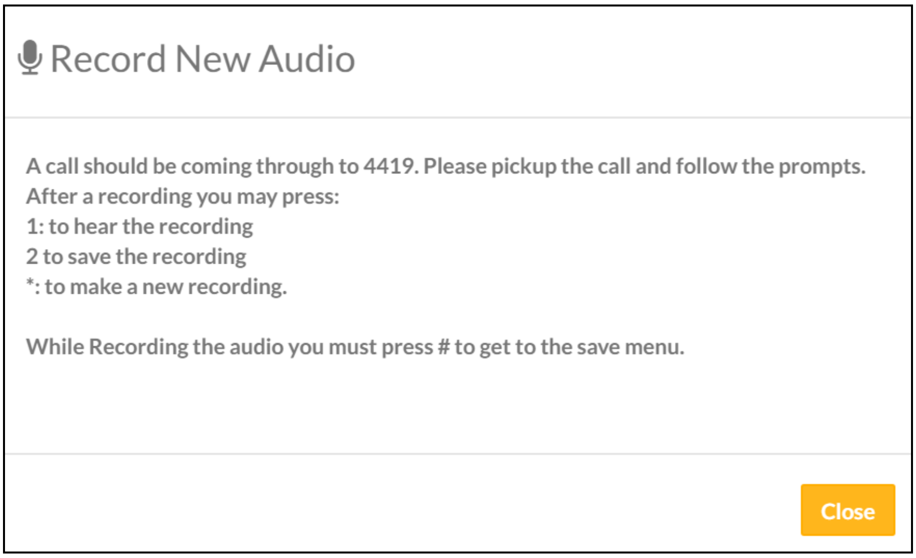
Press **Record Greeting** and select the desired extension or phone number when ready.



Users can also record greetings by pressing *86 from their primary extension and selecting option 0 to access Voicemail Box options. Click **Record Audio** when ready.

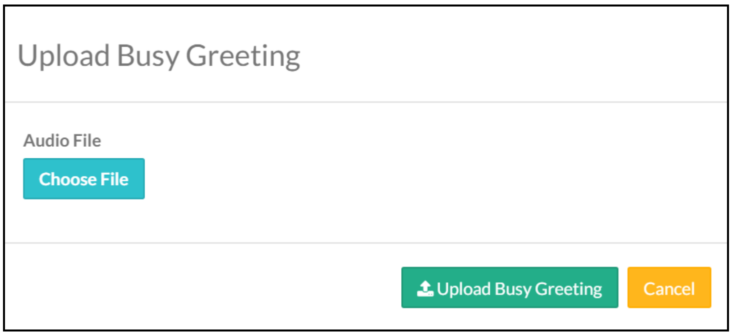


Follow the instructions displayed by answering the incoming call to record the greeting. Click # after successfully recording the greeting, then click **Ready to Save** within Kerauno.



Upload Recording

Press **Upload Recording**, click **Choose File** to browse to the file to upload (.mp3, .wav, .wma, and other files accepted). Then press **Upload Greeting**.



Special Greetings

Temporary Greeting

This greeting type is ideal for a vacation, holiday weekend, or other circumstance outside of normal business hours.

Directory Greeting

This greeting is played to a caller when accessed via a Phone Directory.

Voicemail Greetings

General voicemail greetings are the standard messages played to callers during normal business hours.

Voicemail Busy Greeting

This greeting is played when a user is on another call.

Voicemail Unavailable Greeting

This greeting is played when a user's extension is unavailable.

Clear All Voicemail Greetings

To clear all recorded voicemail greetings and start over, click **Reset Voicemail Greetings**.

Voicemail Quick Reference Guide

Last Modified on 11/22/2019 11:18 am EST

Voicemail Access

Personal Voicemail (VM) access from primary device: *86 or by selecting the voicemail key on your phone.

System VM access: *87 – This allows you to access any voicemail box on the Kerauno system after entering the desired extension number (Ex: After-Hours voicemails)

To reach VM externally: From any phone, dial your extension either directly or via the company directory (if configured) and press *. Enter your PIN number to access your voicemail box.

Via DID: Dial DID number and press * once voicemail audio plays.

Access VM from the Kerauno UI:

- Desktop: Select Voicemail from the User Panel to listen to and manage messages.
- Mobile: Open a web browser and navigate to your Kerauno instance. Log in and access Voicemail from the User Panel.

Keypad Quick Reference

Mailbox Options: Press 0

Record voicemail features from the following options:

Key Press	Greeting Name	Description
1	Unavailable	Played when a call to the extension is not picked up. Record unavailable greeting at the tone and press #. Press 1 to confirm greeting.
2	Busy	Played when already on a call. Record busy greeting at the tone and press #. Press 1 to confirm greeting.
3	Record Name	Used in the company directory. Record name at the tone and press #. Press 1 to confirm recorded name.
4	Temporary Greeting	This greeting overrides both the unavailable and busy messages when enabled. Record greeting at the tone and press # to complete. Press 1 to confirm temporary greeting. This greeting is most often used for extended period of leave (Vacation, Maternity Leave, etc.)
5	Change PIN	Enter new password followed by #. Enter password again and press #. A confirmation message plays when password is successfully changed. You can also change your PIN from the Kerauno Voicemail dashboard.
*		Return to main menu.

Listen to Messages: Press 1

Listen to and manage voicemail messages from the following options:

1 – Play new messages

In message options:

Key Press	Description
0	Pause message; press any key to resume
2	Skip back to beginning of message
3	Advanced Options (not available for all users)
#	Fast forward 3 seconds
*	Rewind 3 seconds

End of message options:

Key Press	Description
5	Repeat
6	Next message or skip current message
7	Delete
8	Forward to another extension
9	Save (see options in table below)
*	Reply
#	Exit Voicemail

Move messages to a Kerauno folder from the following options:

Key Press	Description
0	New
1	Old
2	Work
3	Family
4	Friends
#	Cancel

Advanced Options: Press 3

Additional message features:

Key Press	Description
1	Record a reply voicemail to the caller (also on Kerauno)
3	Play message envelope (date and time stamp)
*	Return to main menu

Calls

Last Modified on 11/14/2019 12:56 pm EST

The **Calls** dashboard allows a user to view call histories, download recordings, and view in-depth details about each call.

From the Kerauno homepage, the orange **Calls** icon displays the number of calls taken today as well as the total talk time for the day.

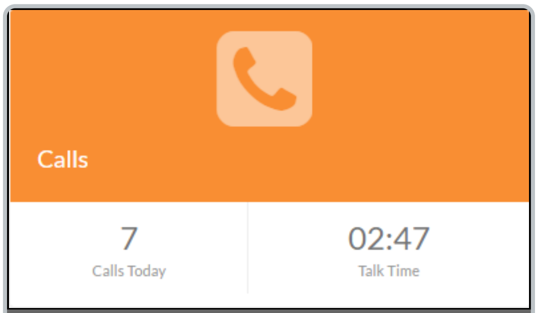


Figure 01: Calls Shortcut Panel

Clicking inside of the orange box opens the **Calls** menu where you can search a database of completed calls.

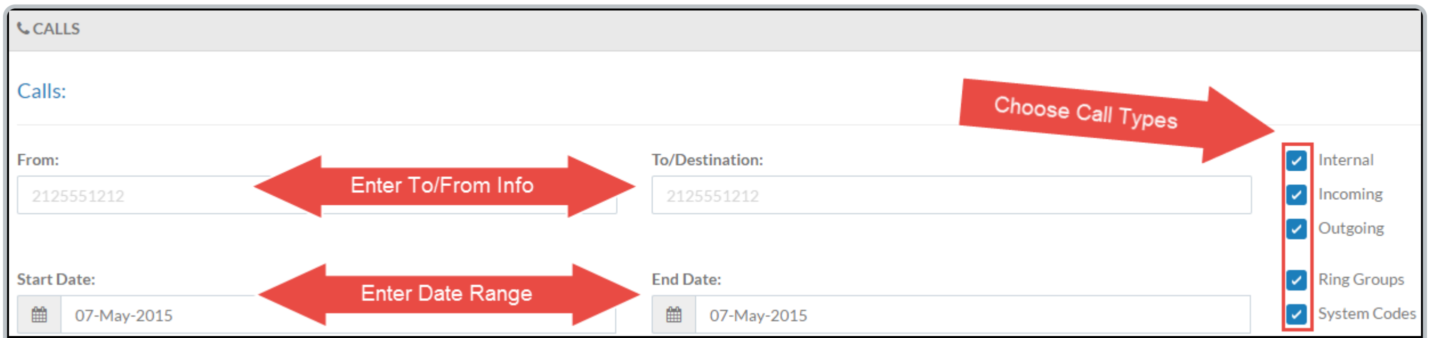


Figure 02: Calls Menu

The following criteria may be used to complete a search:

Start/End Date: Specifies a range in which to search for call records. Clicking the calendar symbol will display a menu that allows start/end search dates to be changed. If start/end dates are the same, only calls from that specific day will be displayed.

From/To: The **From/To** field searches call records by caller ID. Either a 10-digit number or extension may be entered in either of these fields. Entering a **From** value in the search bar will show all incoming calls from the number entered. Entering a **To/Destination** value will show all outgoing calls that were placed to a specific number.

Call Type: Mark the checkboxes on the far right of this page for the report to include/exclude call records for internal extension to extension calls, incoming, outgoing, ring group calls, etc. Only calls for the categories that are checked are displayed.

Figure 03 below is an example of a typical call report. At the top of the table, the total amount of returned records is listed. Each individual call detail record (CDR) in the table includes a unique **Date/Time**, **Type** of call, **From** caller ID, **To** caller ID, **Destination** (ext. that received the call), **Duration**, and **Trunk**. If call recording is enabled for your extension, a recording of the call will also be available for download.

CDRS (23)

Date/Time	Type	From	To	Destination	Duration	Trunk
(1) 2015-04-01 13:10:16	System Codes	1000	*611	*611	00:00:14	Internal
(2) 2015-04-01 12:49:22	Internal	1000	MJ 1004	MJ 1004	00:00:00	Internal
(3) 2015-04-01 12:41:39	Internal	1000	MJ 1005	MJ 1005	00:00:07	Internal
(4) 2015-04-01 12:41:31	Outgoing	1000	3176948142	3176948142	00:00:00	AxiaTP
(5) 2015-04-01 12:41:31	Internal	1000	AL 1009	AL 1009	00:00:00	Internal

Figure 03: Call Report

To view a particular call in even more detail, select the **Date/Time** of a call as shown in Figure 04 below.

Date/Time	Type	From	To	Destination	Duration	Trunk
(1) 2015-04-01 11:55:31	Outgoing	AL 1009	3176948142	3176948142	00:00:00	AxiaTP

Figure 04: Call Detail Record

Clicking any **Date/Time** for a call will take the user to the **In-Call Analytics** page where all information about the call is displayed. Information on this page includes basic call detail information such as time of the call, duration, etc. It also includes a chart that details specific occurrences within the call such as transfers, holds, etc.

Call History

To the right of the user panel, a graph of call activity for the past week is displayed. This graph includes information from the last seven days and measures both inbound and outbound call volumes to any of the user's extensions. Hovering over any of the data points in this graph displays the number of both inbound and outbound calls for that day.

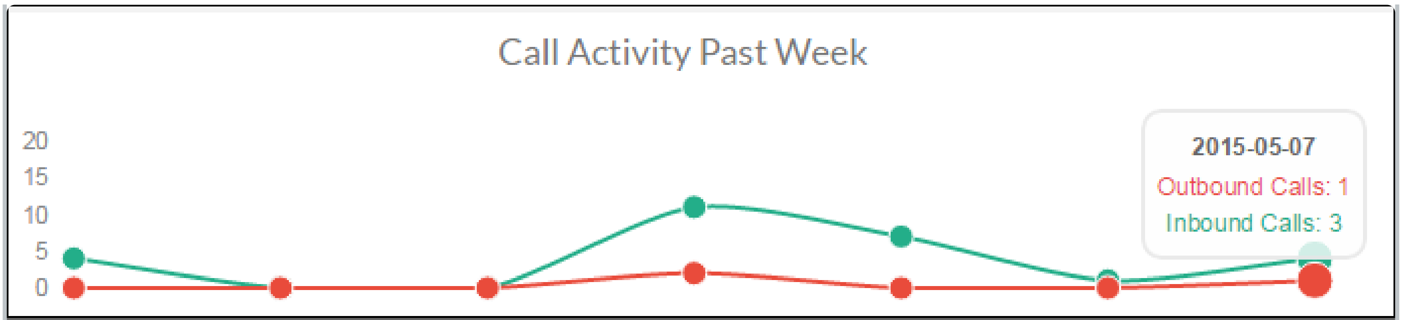


Figure 05: Call History Graph

Find Me

Last Modified on 11/14/2019 2:25 pm EST

Find Me/Follow Me call routing allows a user to redirect calls that are placed to his/her extension to another user or outside telephone number. One of the most frequent uses of the **Find Me/Follow Me** feature is to forward calls to a user's cell phone if the user's desk phone is not answered.

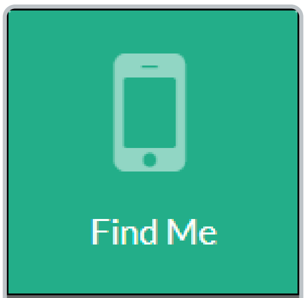


Figure 01: Find Me/Follow Me Shortcut

Press the **Find Me** shortcut from the **User Panel** to display the **Find Me/Follow Me** screen.

The **Find Me/Follow Me** menu displays, allowing the user to configure their call forwarding settings.

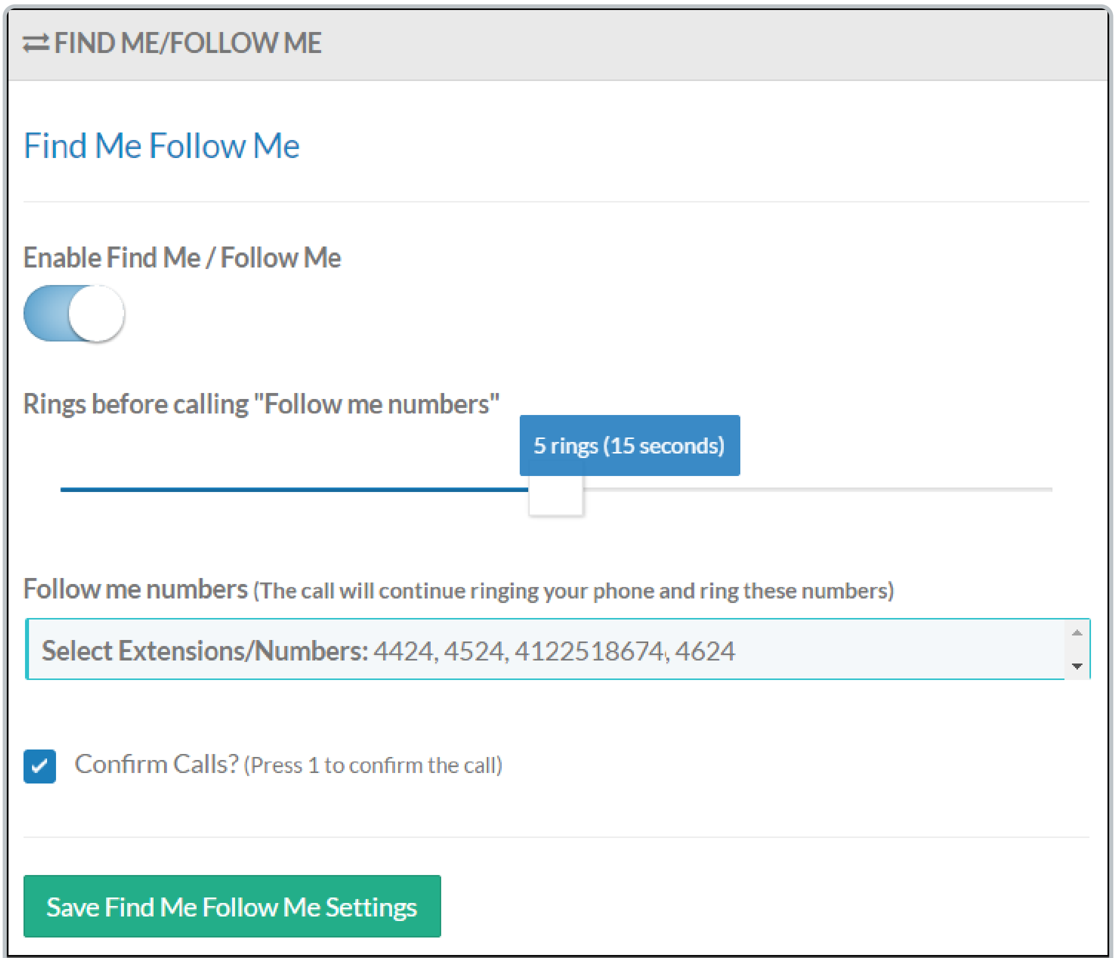


Figure 02: Find Me/Follow Me Screen

Enable Find Me/Follow Me: The slider at the top of the screen allows the call forwarding feature to be turned on/off. When the slider is in the "off" position, calls will not be forwarded to the listed “Follow Me” numbers.

Rings Before Calling “Follow Me” Numbers: The blue slider determines how many rings Kerauno will attempt to dial the user’s primary extension before forwarding the call to the **Follow Me** numbers. Moving the slider fully to the left will ring both the main extension and **Follow Me** numbers simultaneously. The maximum value for this slider is 30 seconds.

NOTE:	Please ensure that the setting for **Rings before Calling Follow Me Numbers** does not conflict with the **Rings before Voicemail** setting. The value set in the **Rings before Calling Follow Me Numbers** value must be less than the value set in the **Rings before Voicemail** setting. Otherwise, calls will be sent to voicemail before call forwarding initiates.

The **Follow Me Numbers** setting is where users are able to set exactly which telephone numbers or extensions calls should be forwarded to when there is no answer at the primary extension.

Click the blue **Select Extension/Numbers** button to open the selection menu screen shown in Figure 03 below.

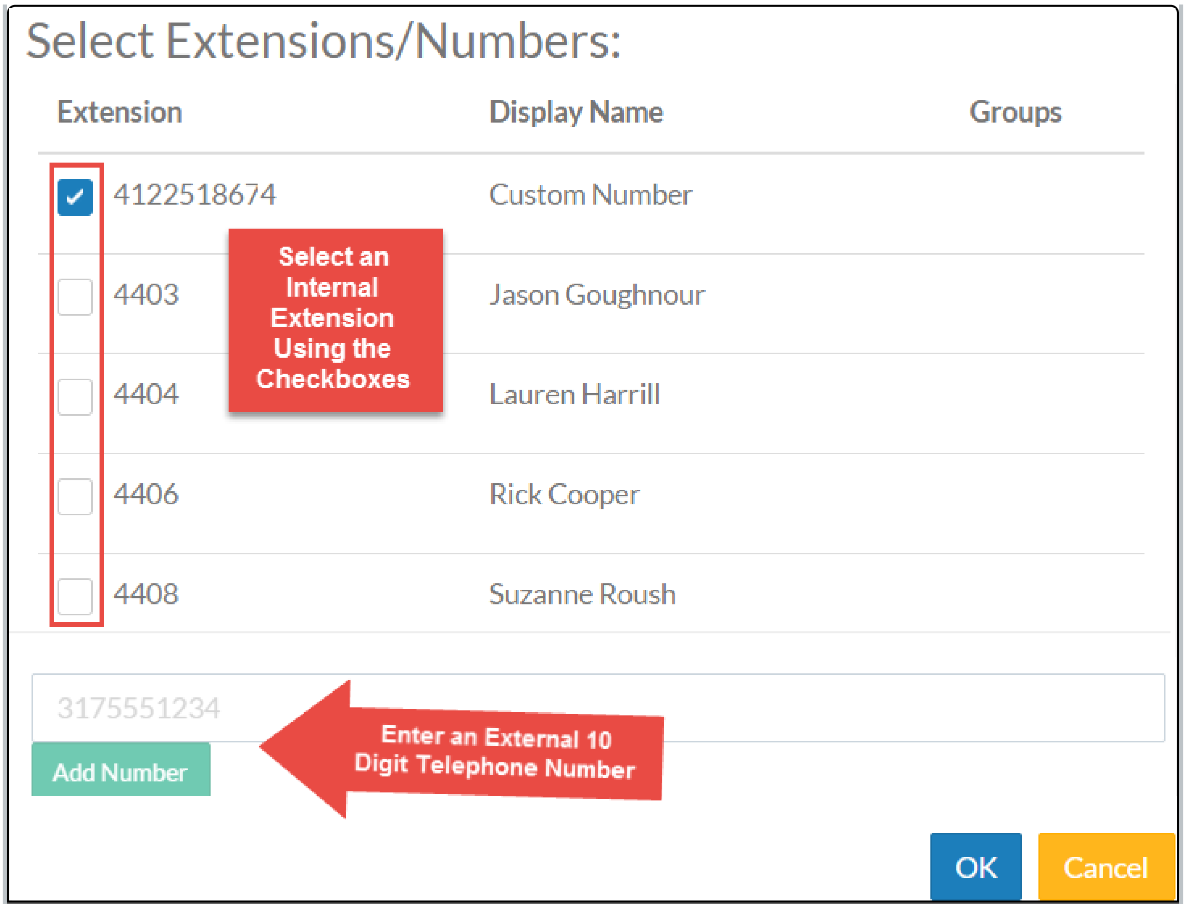


Figure 03: Select Extension/Numbers Screen

To forward calls to an internal extension, click the desired check boxes in the column on the left hand side of the screen. To forward calls to an outside telephone number, enter a ten-digit telephone number into the empty **Add Number** box. After entering a number, click the **Add Number** button and the number will be added into the list of available options.

There is no limit to how many extensions can be forwarded to. After selecting the desired numbers, click the **OK** button to save changes and return to the **Find Me/Follow Me** menu.

The **Confirm Calls?** checkbox is a feature that forces the user to press "1" on their keypad to accept a call that has been forwarded to them. Users will hear the message "You have an incoming call, press 1 to accept". If the user presses 1, the call is connected. If the user does not press 1, the caller will be returned to the user's primary voicemail box.

This is a very useful feature particularly when forwarding to a mobile phone. Using this feature ensures that forwarded calls do not end up in the user's "cell phone voicemail", and are always sent back to the primary extension voicemail box. The benefit of this is that all voicemail is consolidated into one voicemail box instead of being split between the user's mobile phone and desk phone. Also, voicemails left on the user’s primary extension allow access to Voicemail to Email and other useful features.

Phonebook

Last Modified on 11/15/2019 8:49 am EST

The company **Phonebook** tab allows users to view all active extensions built into Kerauno. Press the **Phonebook** shortcut to open the company **Phonebook** options.

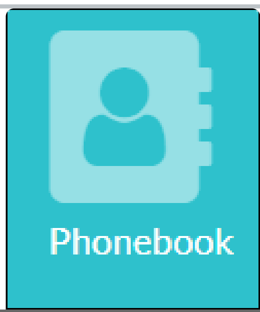


Figure 01: Phonebook Shortcut

Users are able to view the directory by **User Listing**, **Extension Listing**, or **Department Listing** using the tabs at the top of the **Phonebook** screen as shown in Figure 02 below.

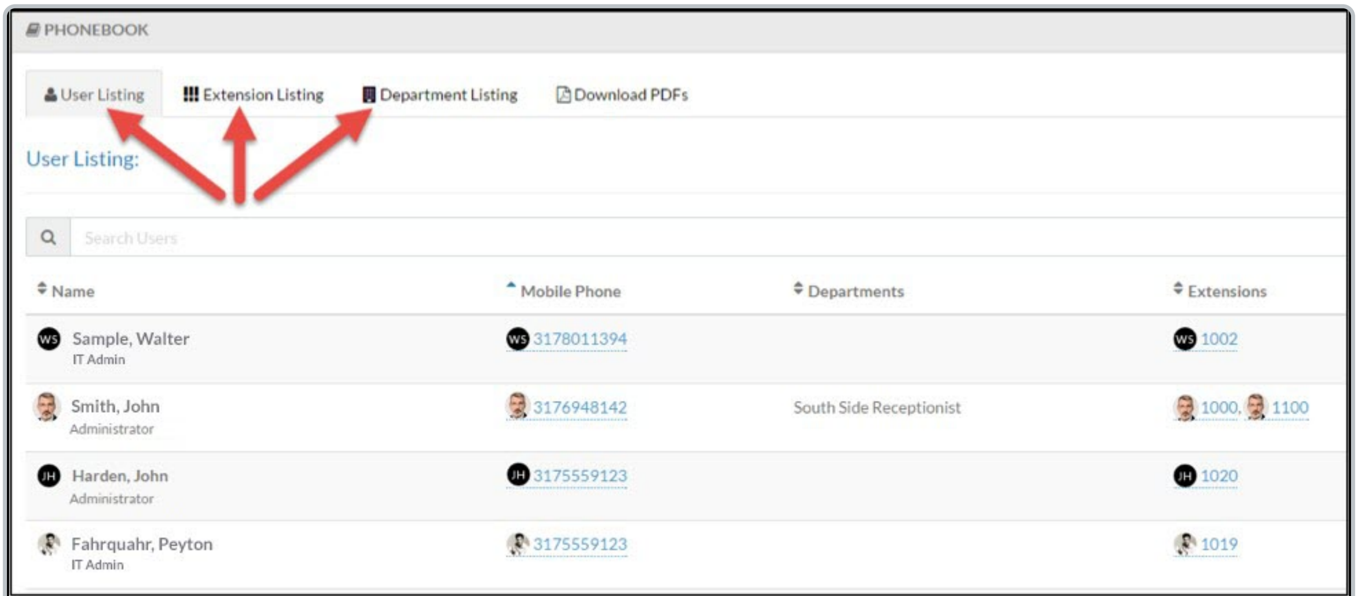


Figure 02: Phonebook - Tabs

When viewing the directory by **Extension Listing**, the directory will include call flow items such as conference rooms, ring groups, speed dials, etc. To sort by a specific column in any of the **Phonebook** menus, select the arrows next to the column title to switch between sorting in ascending or descending order. At the top of any phonebook tab is a search bar as shown in Figure 03 below. Users can search by **Name**, **Job Title**, **Department**, or **Extension**.

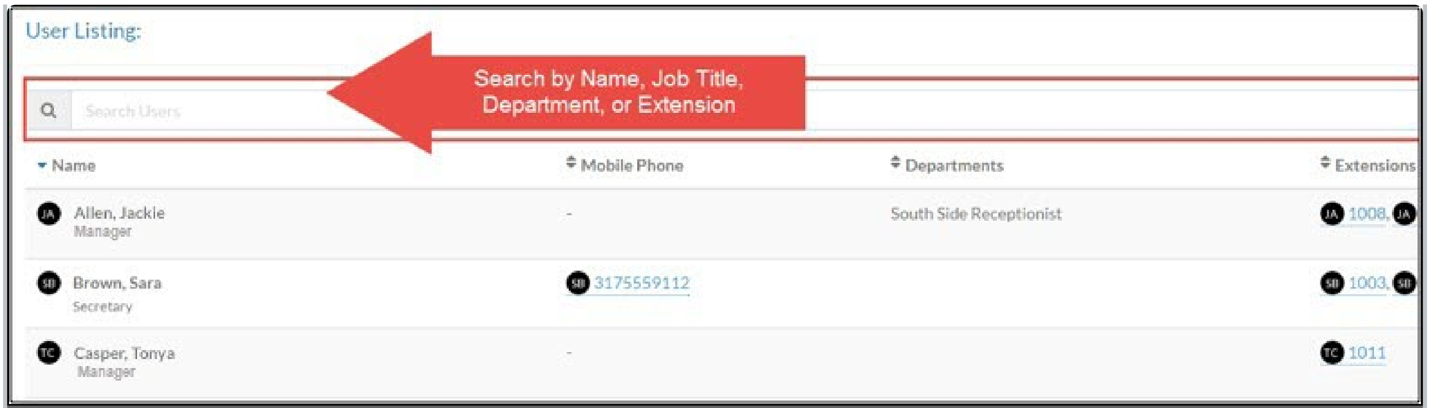


Figure 03: User Listing Search

All extensions and mobile numbers in blue have **Click to Dial** functionality. Clicking on a number within the phonebook will open the user's profile as shown in Figure 04 below.

Figure 04: Click to Dial Functionality

Calls, emails, and voicemails can be sent within the profile page by clicking the blue icons for the specific function. If the user has more than one extension, specific extensions can be dialed by selecting the desired number from the bottom of the profile page. The blue button icons at the top of the profile are explained below:

Calls the selected user on his/her primary extension.

Creates a new email in the user's default email client (e.g., Outlook).

Allows a voicemail message to be recorded and sent directly to the user's voicemail box.

Downloads a vCard file that you can directly import into your cell phone's contact list.

Kerauno allows the user to generate a printable PDF hard-copy of all the extensions built into the phone system.

After selecting the **Download PDFs** tab as shown in Figure 05, click the checkboxes with the items to include in the PDF report (e.g., **Users**, **Ring Groups**, **Conferences**, **Generic Extensions**, **Feature Codes**, or **Departments**) to select them.

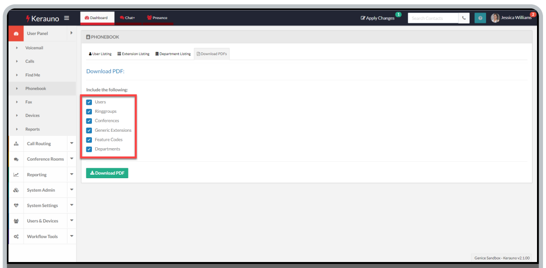
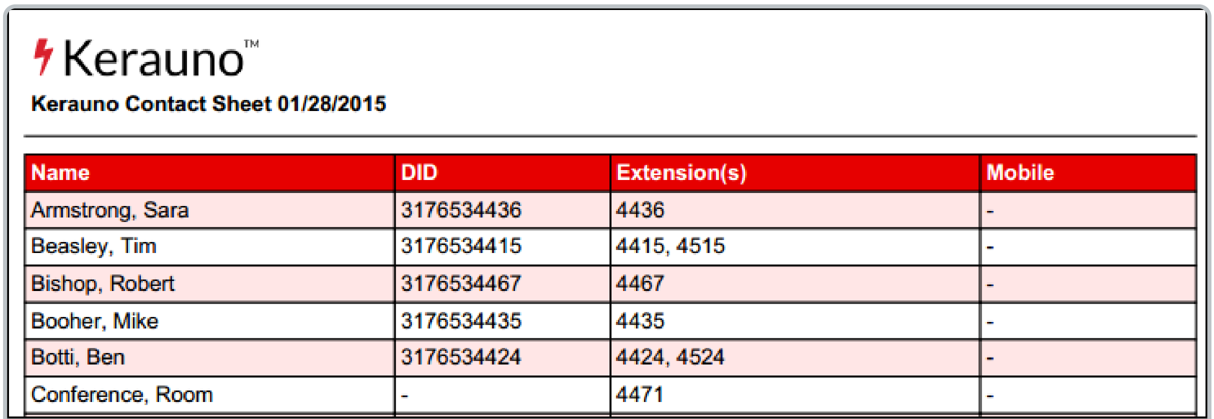


Figure 05: Download PDFs Tab

After selecting the desired options, press the **Download PDF** button. The system downloads a PDF file that you can open in your PDF viewer of choice.



Kerauno™

Kerauno Contact Sheet 01/28/2015

Name	DID	Extension(s)	Mobile
Armstrong, Sara	3176534436	4436	-
Beasley, Tim	3176534415	4415, 4515	-
Bishop, Robert	3176534467	4467	-
Booher, Mike	3176534435	4435	-
Botti, Ben	3176534424	4424, 4524	-
Conference, Room	-	4471	-

Figure 06: Example of a Typical Output File

Fax

Last Modified on 11/15/2019 10:31 am EST

The fax panel allows a user to send and receive faxes from within the user panel. If a user is assigned a DID (Direct Inward Dial) number, any inbound faxes can be sent to and from that number. For example, if the direct dial number to a main desk phone extension is 317-411-1234, that same number can also be used for inbound/outbound faxing.

From the **User Panel** click the **Fax** shortcut to display the **Fax Dashboard**.

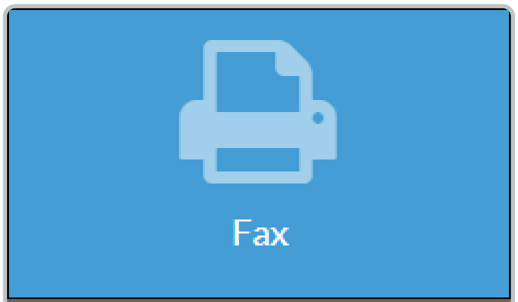


Figure 01: User Panel Fax Shortcut

Received Faxes

When the **Fax Dashboard** opens the **Received Faxes** tab is displayed. This page displays all inbound faxes received to the direct inward dial (DID) number listed at the top of the page. Any inbound faxes received will also be sent to the user's email address as a PDF file.

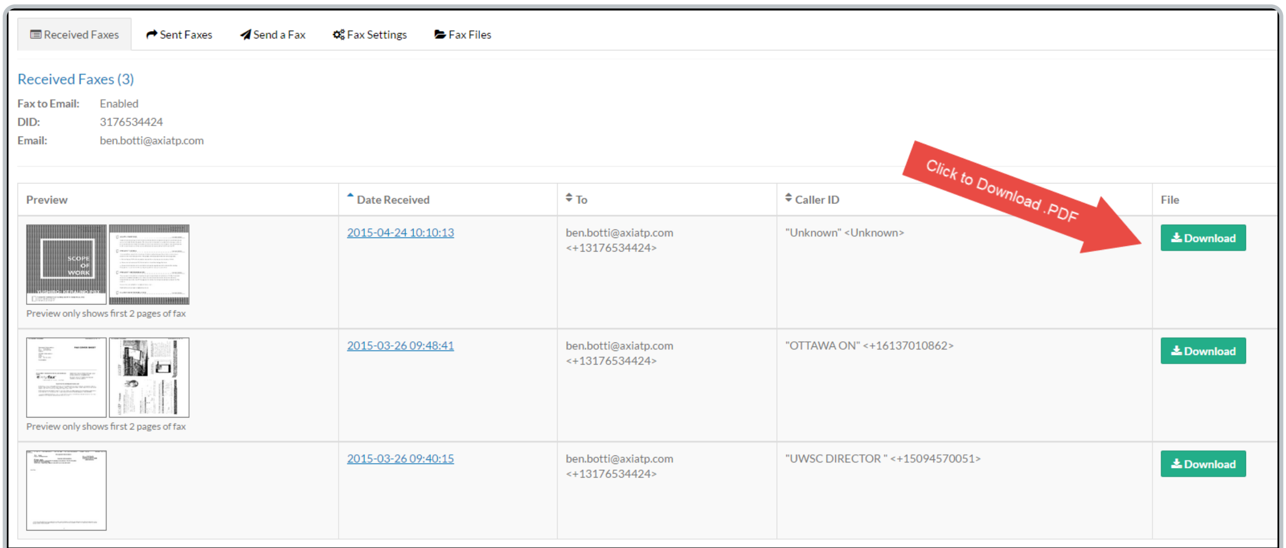


Figure 02: Received Faxes Tab

This table includes a preview of the fax, date received, and to/from caller IDs. On the far right of this page is a green **Download** button. Click this button to download the selected fax as a PDF file.

Sent Faxes

The **Sent Faxes** tab displays any faxes that the user has sent through the fax panel.

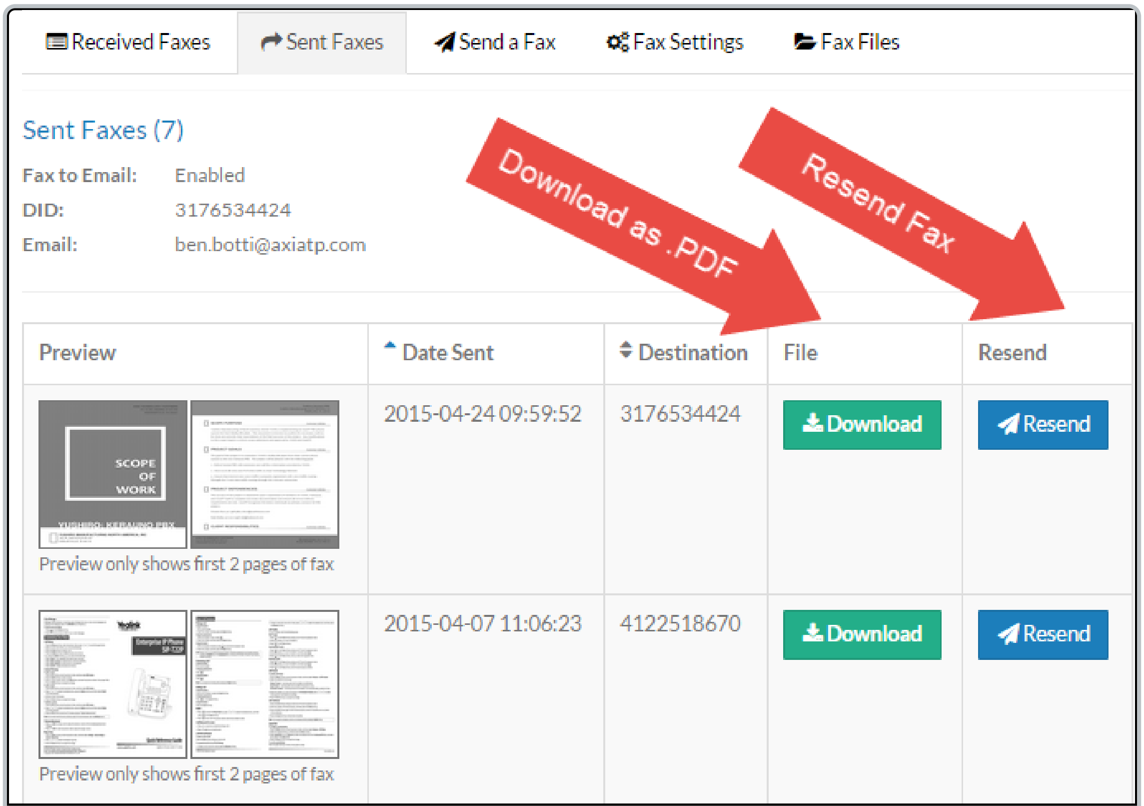


Figure 03: Sent Faxes Tab

To the right side of the table the option is available to download sent faxes as a PDF. The blue **Resend** button allows a user to quickly and easily resend a fax that may have failed, or was never received.

Send a Fax

The **Send a Fax** tab allows a user to send outbound faxes to any 10-digit fax number. To send an outbound fax, enter the recipient's 10-digit fax number in the box on the left. Then, select the light blue **Upload File** button to choose a PDF file to send to the fax recipient. The **Choose Fax File** option allows users to send one of the pre-existing .pdf template files built under the **Fax Files** tab. The **Attach Cover Page to Fax?** checkbox will prepend a cover page to the uploaded PDF file. When a destination number and PDF have been set, press the **Send Fax** button to initiate the outbound fax to the end recipient.

Figure 04: Send a Fax Tab

Fax Settings

The **Fax Settings** tab allows the user to determine which **Fax Caller ID** they would like to send on outbound faxes.

If a user is assigned to a "Generic Fax", they will have the option to send outbound faxes using the "Generic Fax" number. After selecting which fax caller ID to use, click the **Save** button to save changes.

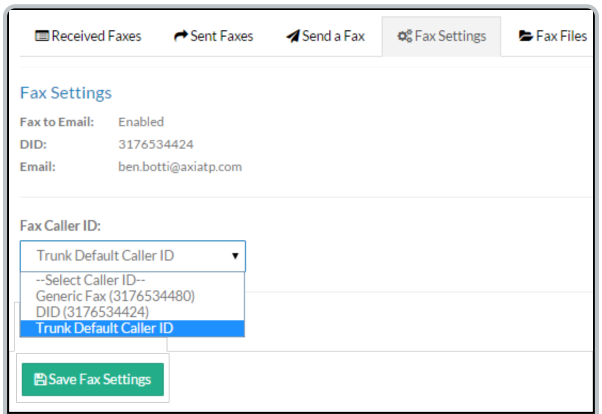


Figure 05: Fax Caller ID

Fax Files

The **Fax Files** tab allows commonly sent files to be set as readily available templates for easy outbound faxing. **Fax Files** remove the need to upload a new PDF file each time an outbound fax is sent. Fax Files are displayed under the **Send a Fax tab > Fax Files** option and can be sent by selecting the desired file from the drop-down box.

To add a new fax file, such as a customer release or legal form, click the **Add Fax File** button at the bottom of the screen as shown in Figure 06 below. A pop-up is displayed that prompts the user for a file name and PDF file to upload. After entering this information and uploading a .pdf file, press the **Submit** button to add the file to the list of available templates.

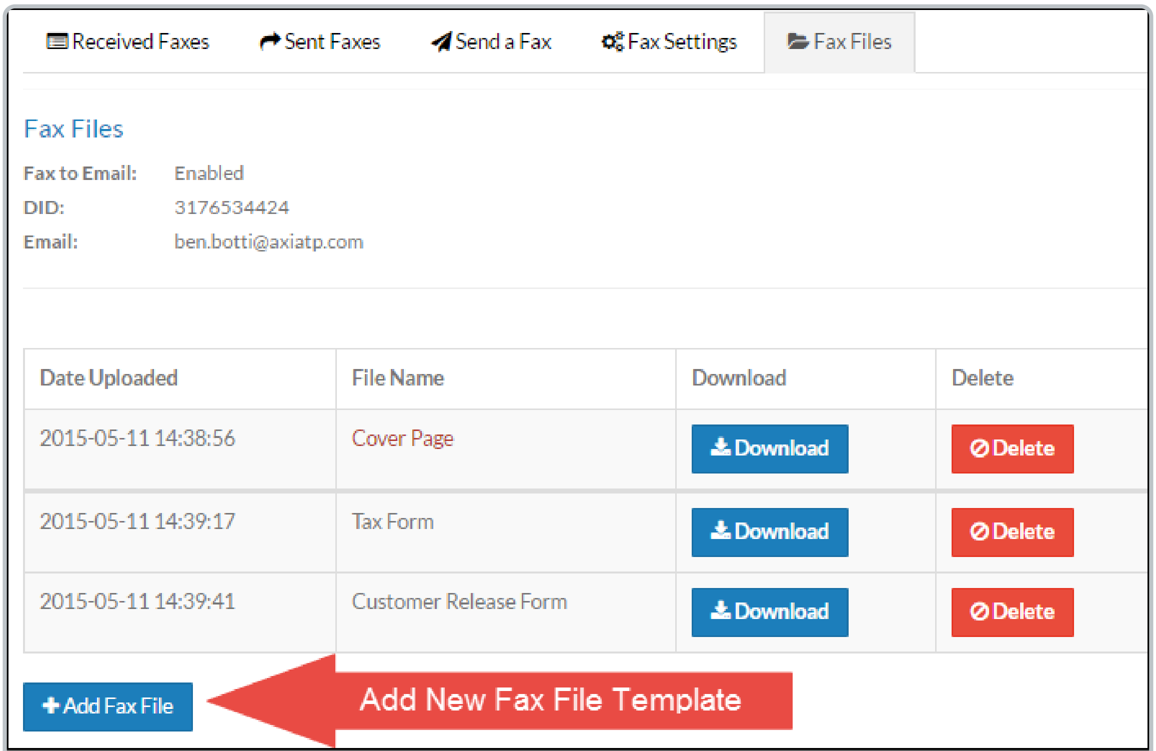


Figure 06: Fax Files Tab

The **Cover Page** fax file will always be shown at the top of this table. This fax file is a static cover page that can be prepended to an outbound fax by selecting the **Attach Cover Page to Fax?** option on the **Send a Fax** tab. To change this fax file, press the **Delete** button then select **Choose File** next to the **Cover Page** option to upload a new PDF.

Devices

Last Modified on 11/15/2019 11:30 am EST

The **Devices** menu contains complete information about a user's telephone hardware and extensions.

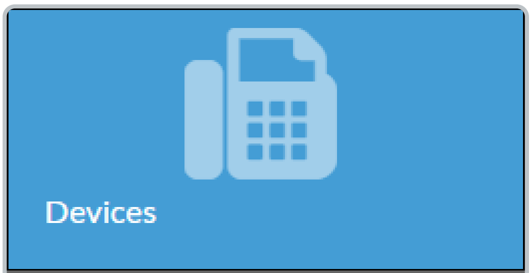


Figure 01: Devices Shortcut

The table displayed on this page shows all of the user's devices currently connected to the phone system. Information shown on this page includes **MAC Address** (a unique identifier specific to each phone), the model, extension, and registration status. A **Reboot** button is also available to restart the phone.

Clicking on the **MAC Address** as shown in Figure 02 below opens the **Device Configuration** screen where some general device information is displayed. The **Extended Configuration** tab allows additional phone settings to be modified.

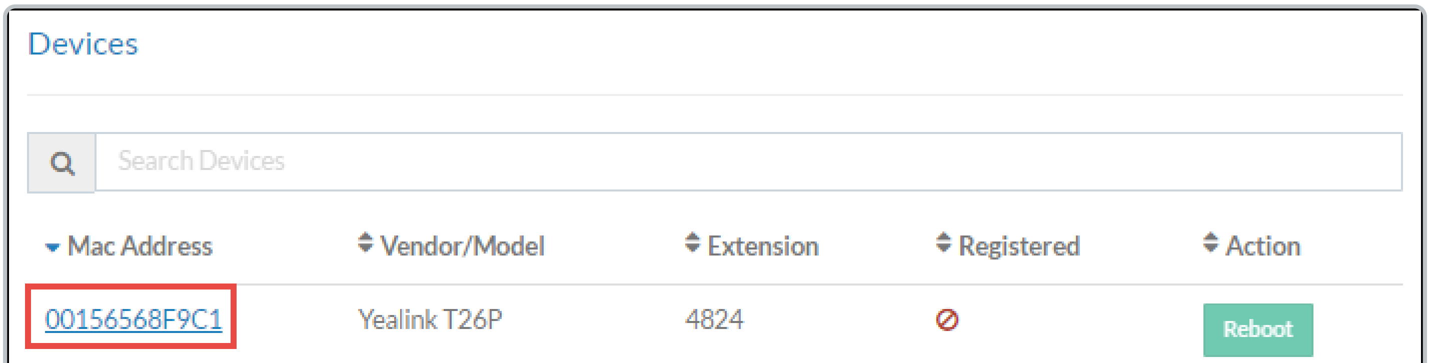


Figure 02: Device Configuration Screen

Clicking the MAC address from the **Devices** tab as shown in Figure 03 below opens the **Device Information** screen.

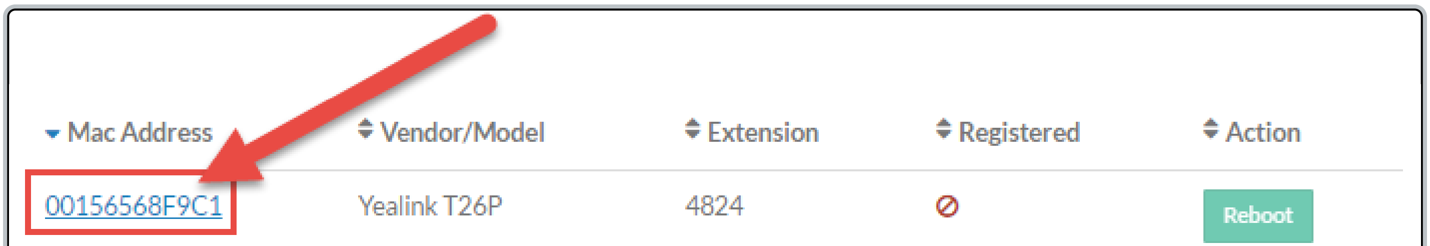


Figure 03: Devices Tab - MAC Address

Selecting the **Extended Configuration** tab from this page allows you to set up the **BLF/Programmable Keys** on a phone as shown in Figure 04 below. There are three fields on this page: **Type**, **Name, and Value**.

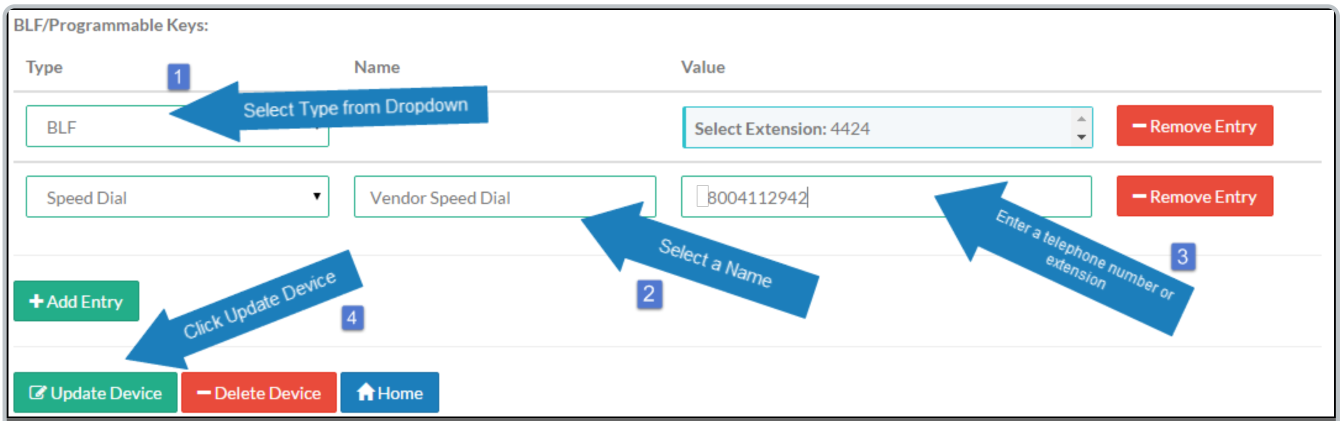


Figure 04: BLF/Programmable Keys Tab

NOTE:	Programmable/BLF keys are not supported on all phone models.

Configurable Key Types include:

- **BLF**: BLF (Busy Lamp Field) is an LCD button on the phone that uses a light to show whether another extension is busy or free to talk. If a BLF displays red, it means that an extension on the phone is busy (in use). If a BLF displays green, it means the extension is not on a call and is available to talk. A BLF key can be configured to "watch" an extension by setting the desired extension in the **Value** field. Pressing a BLF will dial the extension the key is assigned to.
- **Speed Dial**: A **Speed Dial** key will immediately dial an extension or external number that is entered in the **Value** field.
- **Transfer**: A **Transfer** key allows a one-touch transfer to either an external number or internal extension entered in the **Value** field.
- **Park**: A **Park** button places a call on park in the **Parking Lot** set in the **Value** field. The call will be placed in the first available parking slot.
- **Parking Slot**: A **Parking Slot** button will allow a call to be picked up after it has been placed in park. The call will be picked up from the **Park Slot** set in the **Value** field.

After configuring the desired keys, press the **Update Device** button to reboot the phone and save changes.

The **Extensions** tab allows you to see information about all of your current extensions. This includes extension numbers, phone type, and extension names. Clicking on the phone type will display username and password information needed to register a virtual “softphone” client on either a cell phone or desktop PC.

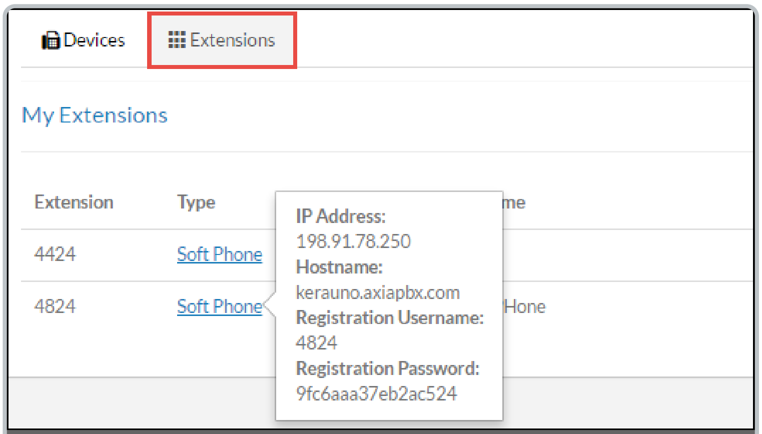


Figure 05: Extensions Tab

Reports

Last Modified on 11/15/2019 11:49 am EST

Reports may be run daily, weekly, monthly, or quarterly and are automatically sent to the user's assigned email address. All reports that are displayed on the **My Reports** screen must be set up by either an administrator or manager under the Kerauno **Reporting** dashboard.

All reports that the user is scheduled to receive will show in the **My Reports** menu accessed by clicking the **Reports** shortcut.

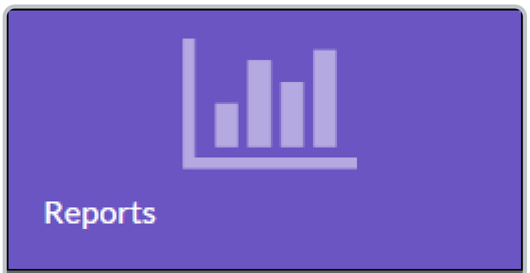
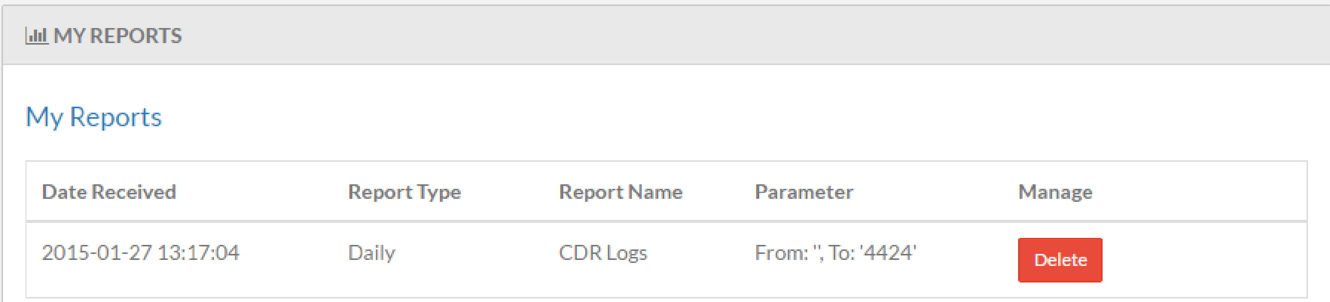


Figure 01: Reports Shortcut

If a user has been scheduled to receive reports by an administrator or manager, all of these scheduled reports are displayed under the **My Report** section as shown in Figure 02 below. This table displays the date the report was generated (**Date Received**), **Report Type** (daily,weekly,etc), **Report Name**, as well as the data included in the report.



MY REPORTS

My Reports

Date Received	Report Type	Report Name	Parameter	Manage
2015-01-27 13:17:04	Daily	CDR Logs	From: '', To: '4424'	Delete

Figure 02: My Reports - Scheduled Reports

Press the **Delete** button in the Manage column. The indicated report will no longer be sent via email and will be removed from the list of active reports.

Keraunо Presence

Last Modified on 11/15/2019 2:18 pm EST

The **Action Bar** is shown at the top of the screen and allows you to quickly initiate calls, transfer calls, place calls on hold, or even create impromptu conference bridges. The buttons on the **Action Bar** display throughout Kerauno Presence and are present on every dashboard.

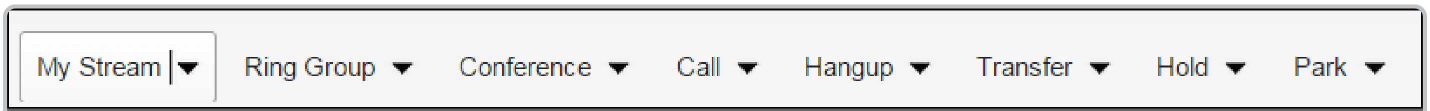


Figure 01: Action Bar

My Stream

Shortcut: "M" Key

The **My Stream** button opens the **My Stream** window that displays all active calls, chat sessions, and call history.

This button is useful when switching between multiple dashboards, as active calls are always visible from this menu.

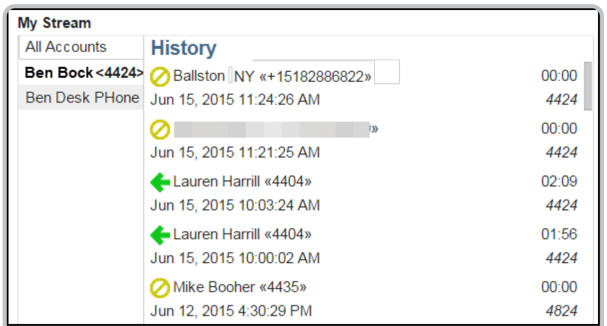


Figure 02: My Stream

Ring Group

Shortcut: "Q" Key

The **Ring Group** button displays a list of all **Ring Groups** currently configured in the Kerauno phone system.

Clicking on a ring group on the right side of the panel allows you to login or logout of a specific group. The **Logout All** button at the top-right of this menu allows a user to logout of all ring groups that they may be a part of.

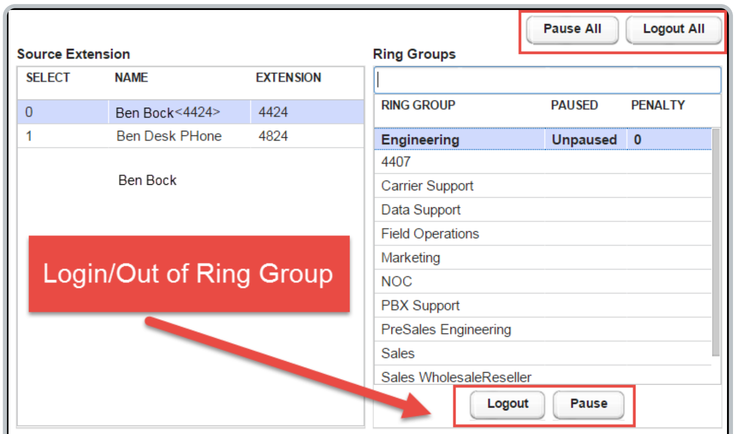


Figure 03: Ring Group

Call Button

Shortcut: "C" Key

The **Call** button allows users to originate calls to specific extensions or external numbers. The panel on the left allows the user to choose which of their extensions to dial from; the panel on the right allows the user to determine which extension or external number to call.

The **Destination** bar can be used to search by extension and name, but can also be used to dial any other telephone number.

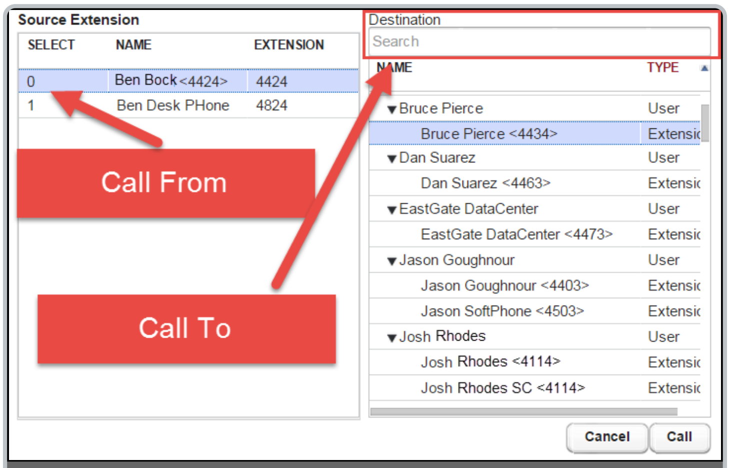


Figure 04: Call Button

Transfer Button

Shortcut: "T" Key

The **Transfer** button allows a user to easily transfer calls to any other extension within the Kerauno phone system. On the left panel, a list of active calls is displayed; on the right panel, all extensions built in the phone system are listed.

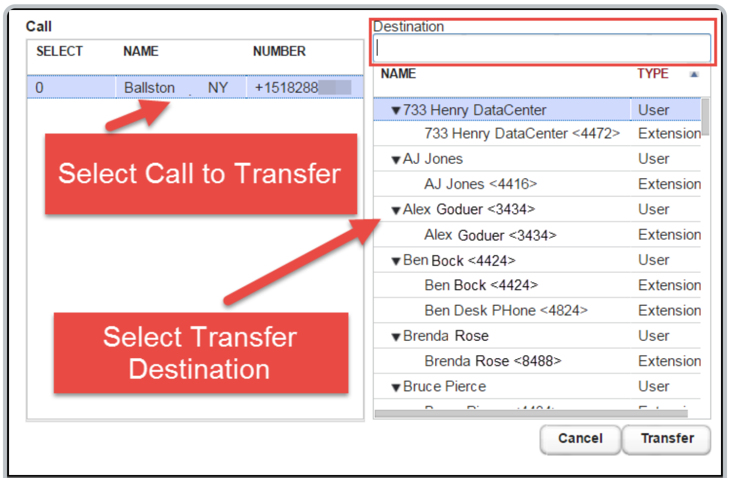


Figure 05: Transfer Button

To transfer a call, select the desired transfer destination from the panel on the right and click **Transfer**. The **Destination** bar can be used to search by extension and name. You may also transfer to any telephone number by typing it in this bar.

Conference Button

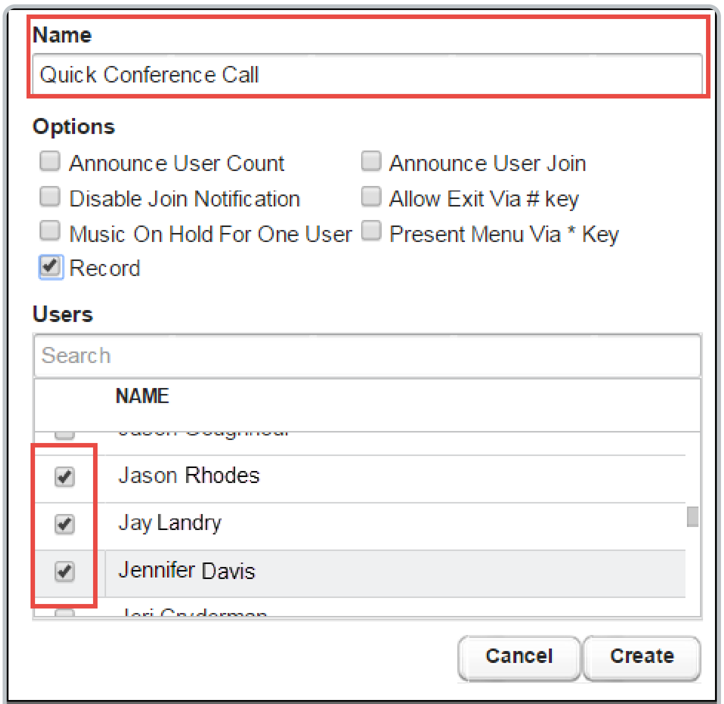


Figure 06: Conference Button

Shortcut: "R" Key

The **Conference** button allows you to create ad-hoc conference rooms on the fly. To do this, click the **Conference** button from the action bar. In the first box on the menu that follows, give the temporary conference room a name (e.g., Temp Conference, Quick Call, etc.).

Under the **Users** menu, check the boxes next to any user that you would like to join the conference. When you have checked all the users that you would like to include, click the **Create** button. All selected users will be dialed simultaneously into the conference.

NOTE:	If you would like to be included, make sure to check your own name as well.

Hold Button

Shortcut: "X" Key

Use the **Hold** button to toggle calls between active/held states. To do this, simply select the **Hold** action button, click the active call, and select **Hold**.

Park Button

Shortcut: "P" Key

The **Park** button allows you to quickly place a call into a parking lot. To place a call on park, select the desired call on the panel to the left then select the desired parking lot in the panel on the right. Press the **Park** button to place the call into the selected parking lot.

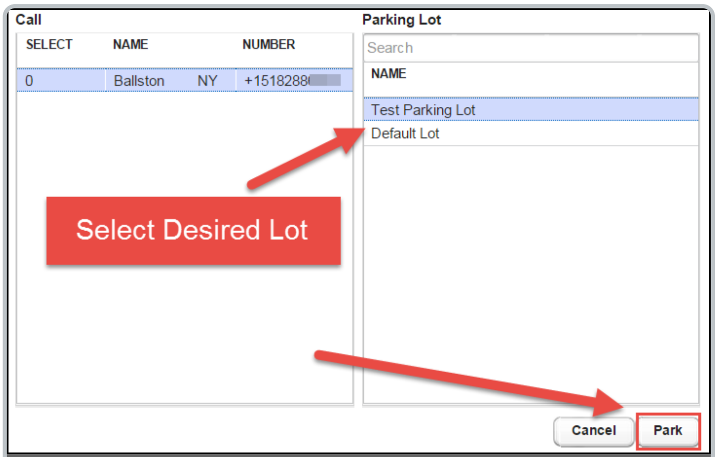


Figure 07: Park Button

Presence Overview

Last Modified on 11/15/2019 2:23 pm EST

Kerauno Presence is an enterprise call management software tool that interfaces directly with the Kerauno phone system. Presence allows users to interact with the phone system in real time to transfer, hold, and view calls that are going on throughout the phone system.

Figure 01: Presence Shortcut

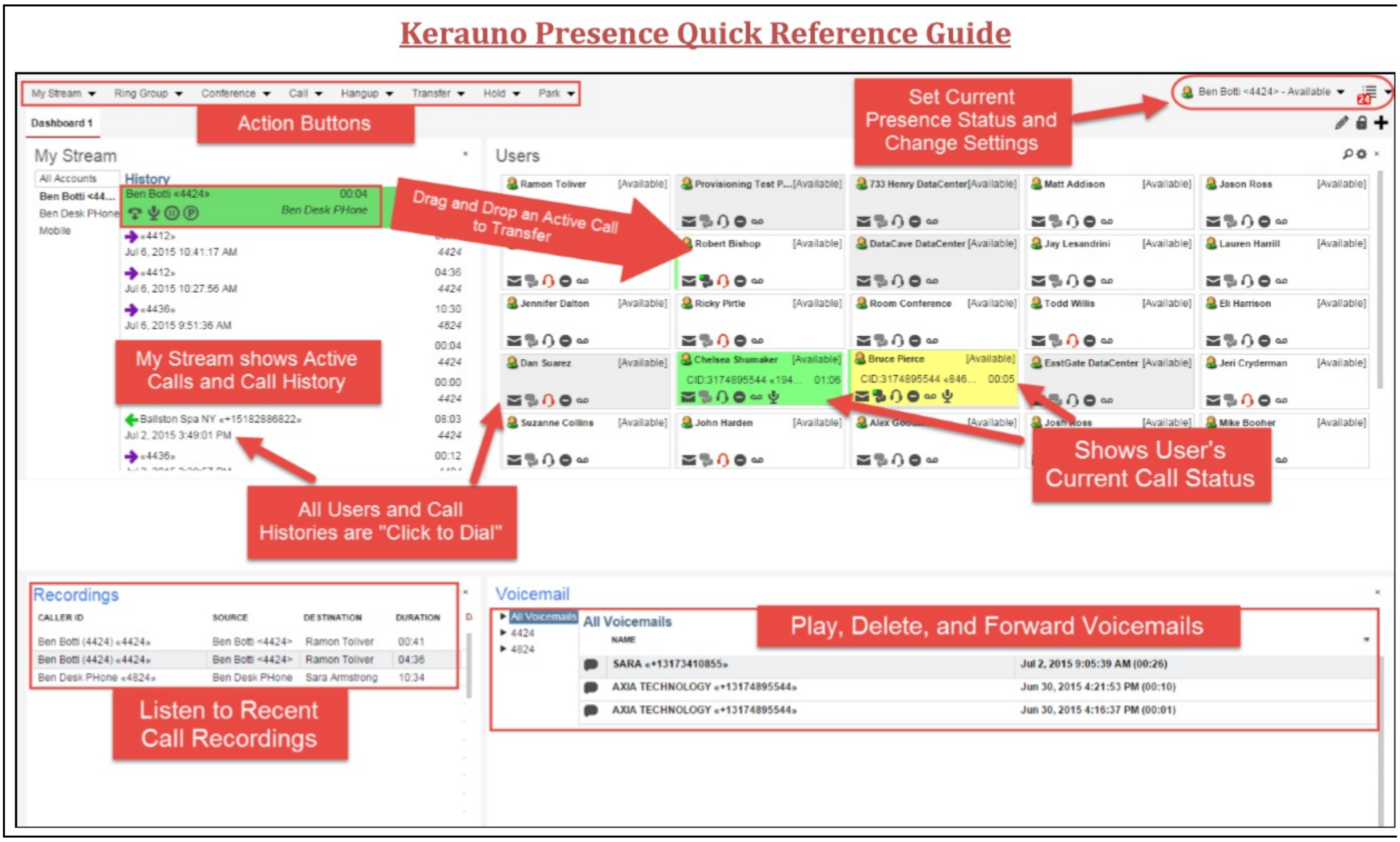
Features Include:

- Interactive Call Dashboards
- Drag and Drop Transferring
- Instant Messaging/Chat
- Desktop Notification
- Voicemail Forwarding
- Recording Sharing
- and much more...

Kerauno Presence allows you to initiate calls with your keyboard, check your voicemail, listen to call recordings, and see who is on the phone, all in one easy to use interface.

Presence Quick Reference

Last Modified on 05/25/2018 8:41 am EDT



Presence Status

Last Modified on 11/15/2019 2:48 pm EST

The top section of the **User Menu** lists all pre-defined status settings for the user and an option to set custom statuses. Selecting any of the statuses will set the user's current status to the selected status; selecting the **Custom Status** option displays a dialog box allowing the user to enter their own status.

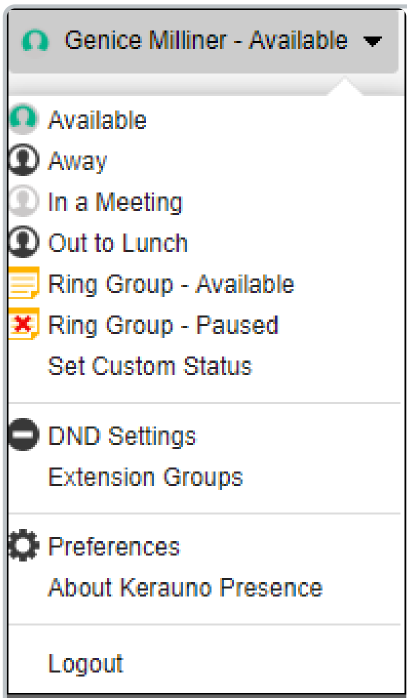


Figure 01: User Status

Setting Your Status

To set your **Status** you can select one of the **Predefined Statuses** from the **User** menu in the top-right corner of the **Kerauno Presence Interface.** If you wish to set a custom **Status** with a different **Name/Note** select **Set Custom** from the **User** menu.

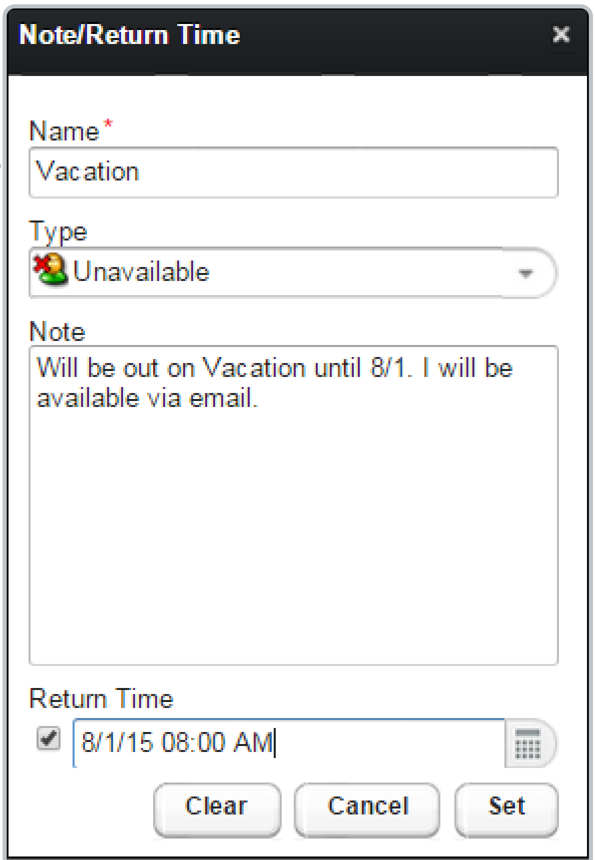


Figure 02: Setting Your Status

Name

The **Name** property is what will be displayed to other users in the **Users Widget** when you are set to the specific **Status.** This is a required field.

Note

The **Note** property allows you to add additional information about your current **Status.** Any user can see this information by hovering over it in the **Users Widget**.

Return Time

The **Return Time** property allows you to specify the date and time you will return. The **Return Time** can be seen by any user hovering over the **Status** icon on the **User Boxes** in the **Users Widget**.

Dashboards

Last Modified on 11/15/2019 2:57 pm EST

The Kerauno Presence Client Interface allows users to create several dashboards containing **Layouts** tailored to their needs. Each dashboard can have its own custom **Layout** and contain **Widgets** of the user's choosing.

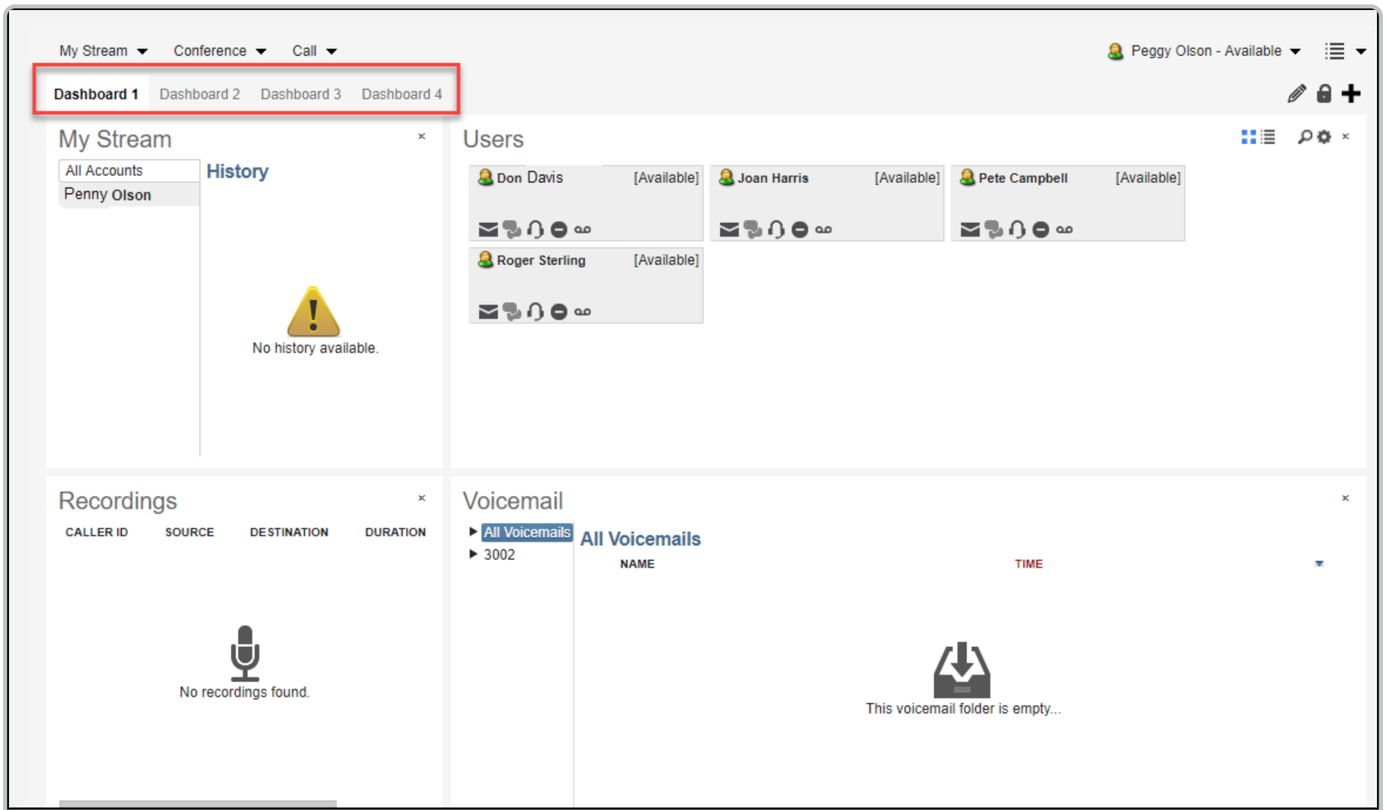


Figure 01: Kerauno Presence - Multiple Dashboards

Each dashboard can be configured separately from other dashboards and allow users to have different system views available to them at any given time.

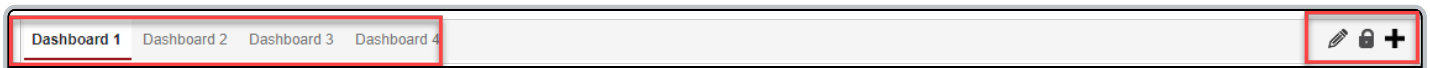


Figure 02: Dashboard Configurations

Adding New Dashboards

Users can create new Dashboards by pressing the **Plus** icon at the top-right corner of the dashboard area in the client as shown in Figure 02 above.

Removing Dashboards

Existing dashboards can be removed by pressing the **Lock** icon at the top-right corner of the dashboard area in Presence. This will "unlock" the dashboards and allow you to remove any dashboard of your choosing by selecting the red **X** button on the dashboard tab you want to remove. You can re-lock the dashboards by pressing the **Lock** icon again.

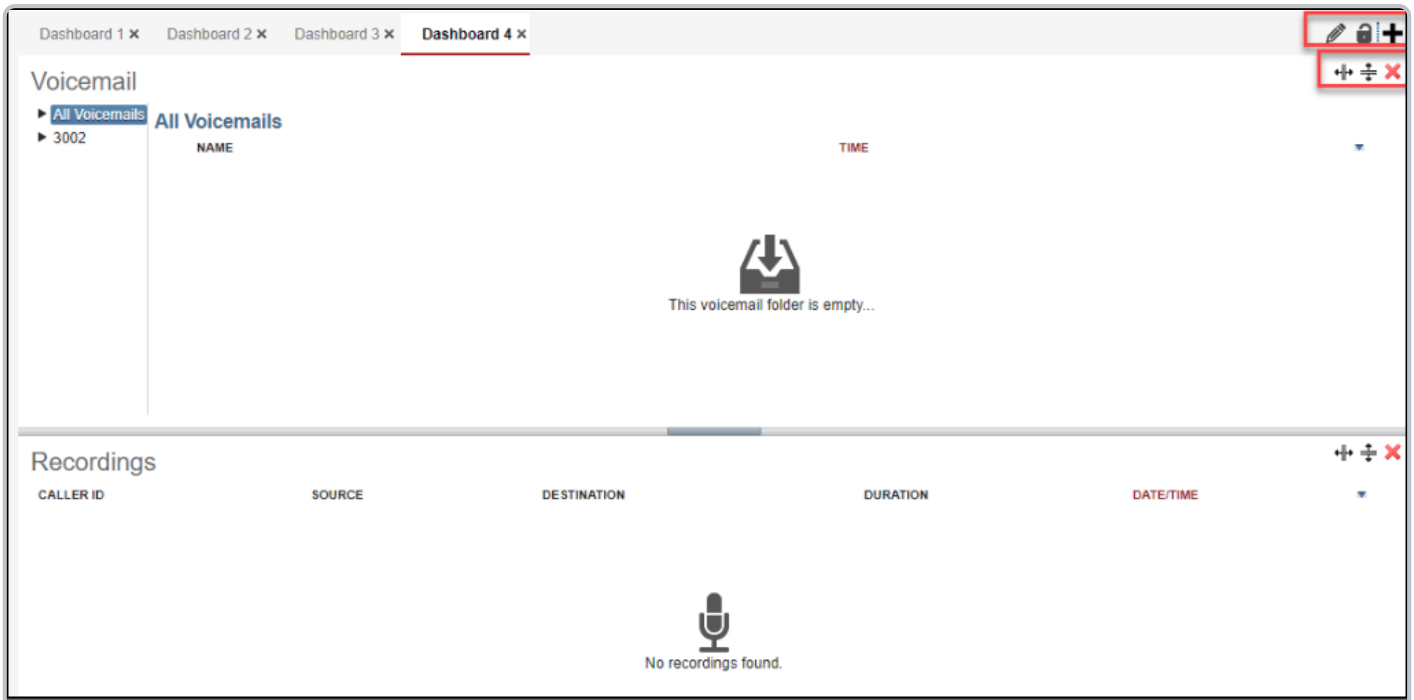
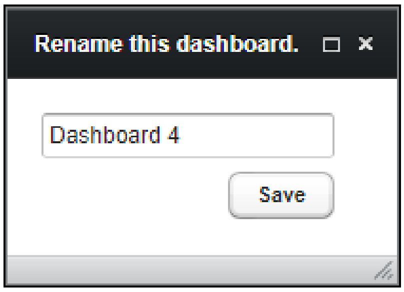


Figure 03: Deleting a Dashboard

Renaming Dashboards

The currently selected dashboard can be renamed by pressing the pencil icon () in the top-right corner of any dashboard screen. Renaming dashboards will allow you to indicate with an easily identifiable name which dashboard contains a specific set of widgets (e.g., Call Queue Dashboard, Statistics Dashboard, or Personal Dashboard).



Dashboard Layout

Last Modified on 11/15/2019 3:31 pm EST

You can modify the layout of a dashboard to better fit your needs by horizontally and/or vertically splitting existing panels in the layout or removing panels completely from the layout. To modify a dashboard layout, select the dashboard you want to edit then press the lock icon ( ) to lock/unlock the dashboard.

Panel Management

Panels in the layout provide a place to insert Widgets. Each panel in the layout can hold one Widget. If the layout is unlocked or there is a panel that does not currently contain a Widget, you will have to access the panel actions via the three buttons that appear on the top-right corner of the panel.

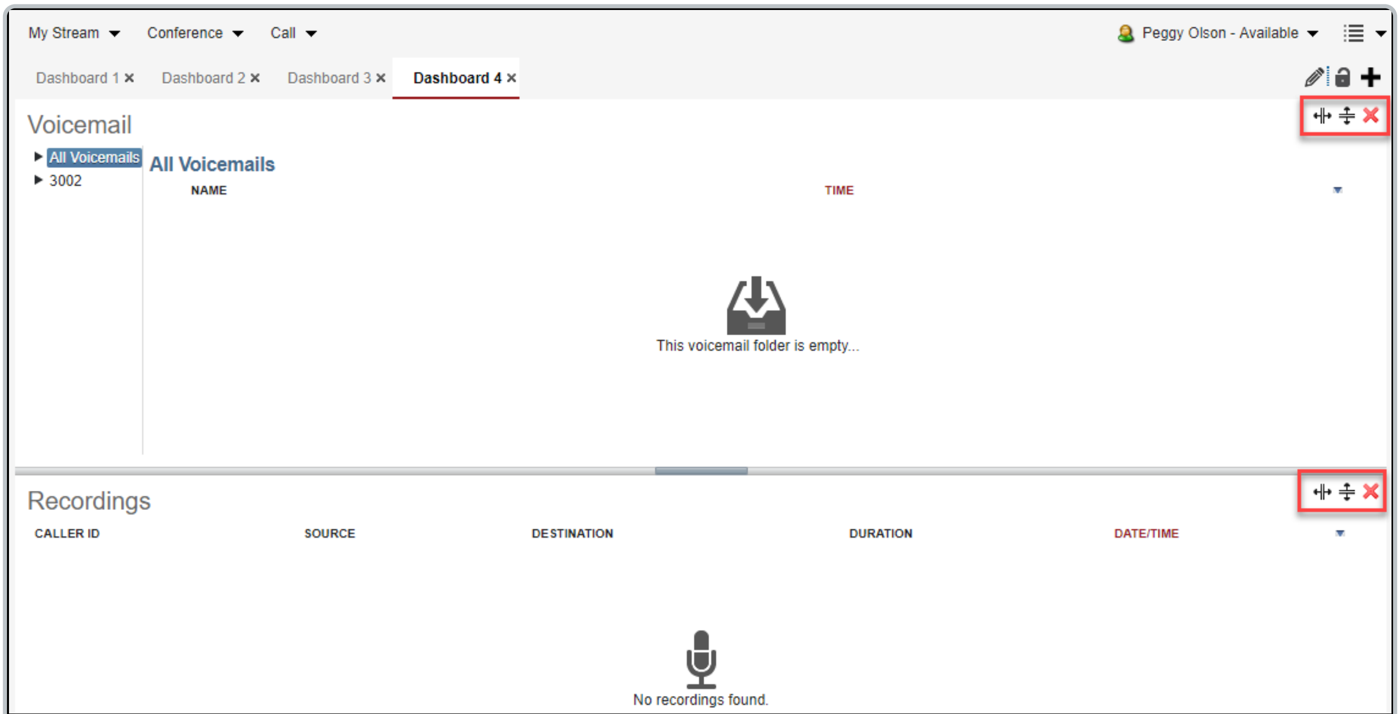


Figure 01: Panel Management Icons

These actions allow you to create new panels by splitting existing ones or removing panels all together.

Splitting or Removing Panels

NOTE:	Before splitting or removing panels, click the Lock icon ( ) in the upper-right of the screen to move to edit mode.

To split a panel into two separate sections along the vertical axis of the existing panel click the Vertical Split icon: . This creates a second panel directly next to the existing one.

To split the panel into two panels along the horizontal axis of the existing panel click the Horizontal Split icon: . This creates a second panel directly below the existing one.

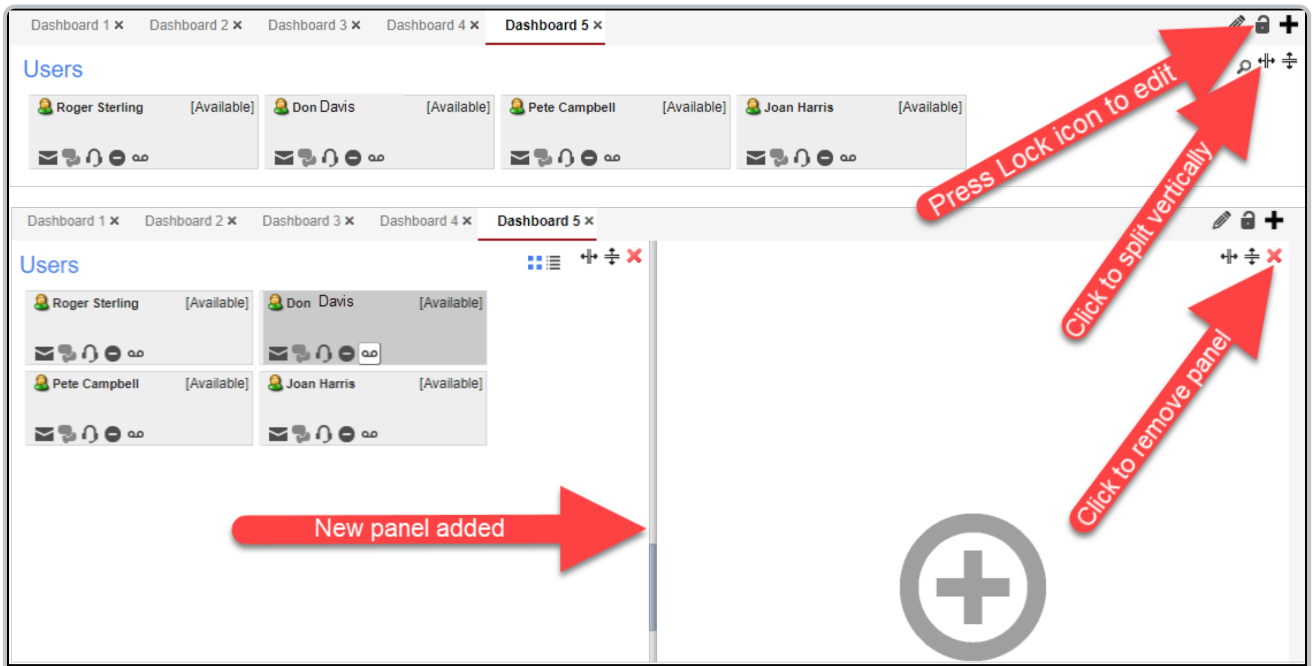


Figure 02: Vertical Split Example

To remove a panel press the delete icon: . The panel, including all Widgets in the panel, will be removed from the layout.

User Settings

Last Modified on 11/18/2019 11:29 am EST

This article describes how to work with user settings from the user menu, including customizable user settings such as **Do Not Disturb(DND)** and **Preferences**.

DND Settings

The **DND Settings** menu item displays a dialog box allowing the you to set or unset your extensions in **Do Not Disturb** mode. When in **Do Not Disturb** your inbound calls go directly to voicemail.

Preferences

The **Preferences menu** item displays a dialog box allowing the you to set your personal preferences for call transfers and notifications.

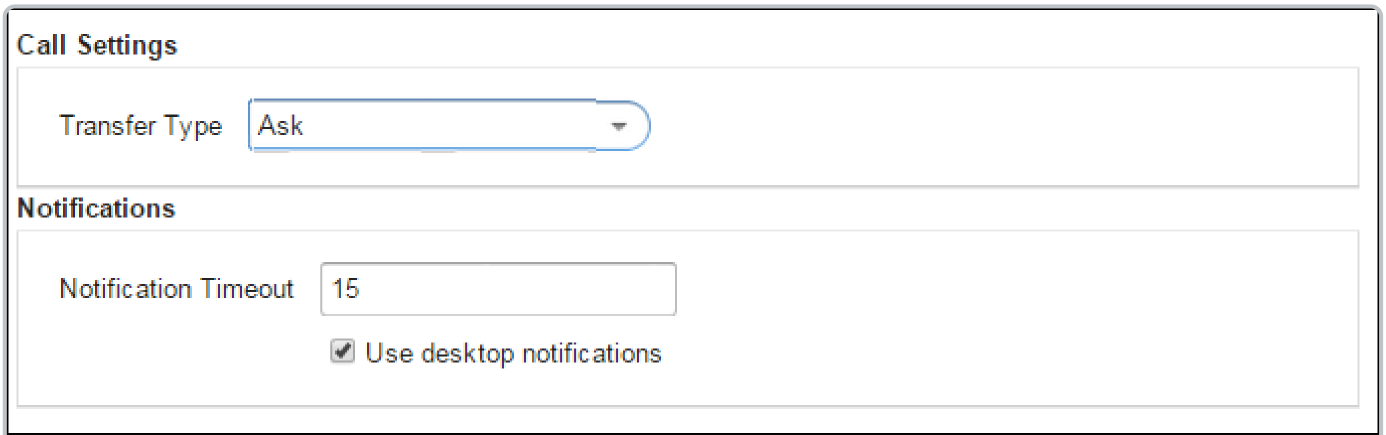


Figure 01: Preferences Dialog

Transfer Type

The **Transfer Type** setting determines how your phone will behave when transferring calls from within Kerauno Presence. There are three available options from the drop-down:

- **Blind**: The call will be directly transferred to the destination, disconnecting your phone.
- **Attended**: The destination extension of the transfer will be called first in order to ask them if they wish to receive the call. The transferred call will be placed on

hold. The transferring user can then hang up the call with the destination in order to complete the transfer. If the destination extension hangs up first, the call will be returned to the original extension.

- **Ask**: When transferring a call, you will be prompted to select **Blind** or **Attended** each time.

Notifications

If the **Use Desktop Notifications** box is checked, desktop notifications will display when your browser is minimized. Anytime an incoming call rings your extension or a voicemail is left, a notification similar to the one in Figure 02 on the right will display.

Figure 02: Desktop Notification Example

NOTE:	The **Notification Timeout** setting determines how many seconds you want to leave the notification displayed. Please note that the Notification feature is compatible with most modern browsers; however, the feature will not currently work with Internet Explorer.

Widgets

Last Modified on 11/18/2019 12:06 pm EST

There are different Widgets available in Presence that provide different functionality. Each Widget takes up one panel within a dashboard.

Adding a Widget to a Panel

Empty panels in the layout will have a circled plus icon ( ) in the center of the empty panel.

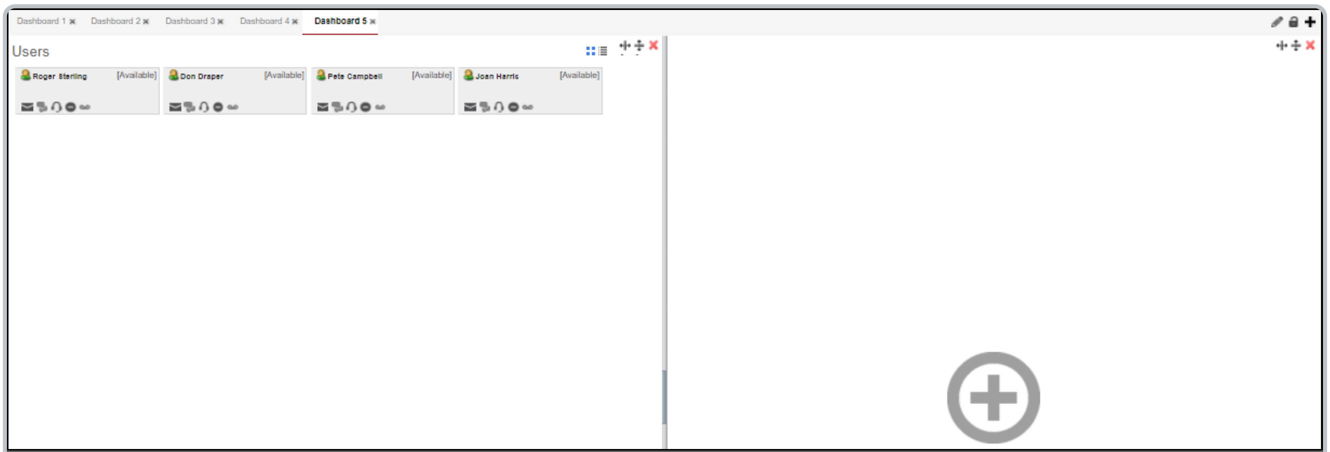


Figure 01: Empty Panel

You can click anywhere in the empty panel to display the Widget Selection dialog box. From this dialog box, you can search for and select a Widget to add to the empty panel.

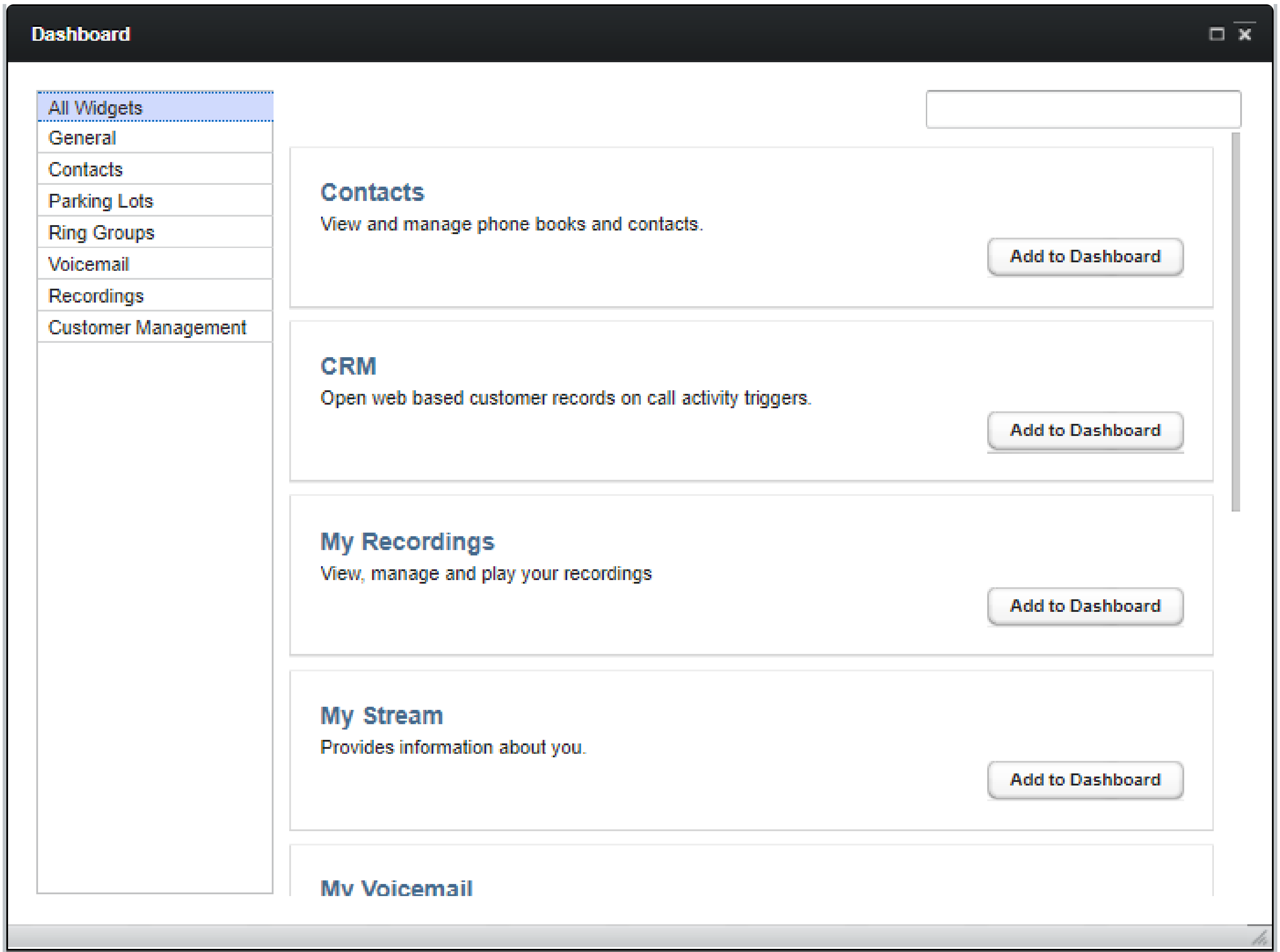


Figure 02: Add Widget to Dashboard Dialog Box

Click the **Add to Dashboard** button to the right of the Widget you want to insert.

Moving a Widget to Another Panel

You can drag and drop a Widget header to an empty panel in order to move the Widget from one panel to another. In Figure 03 below, the Users header is being drug from the panel on the left into the open panel on the right, moving the Widget.

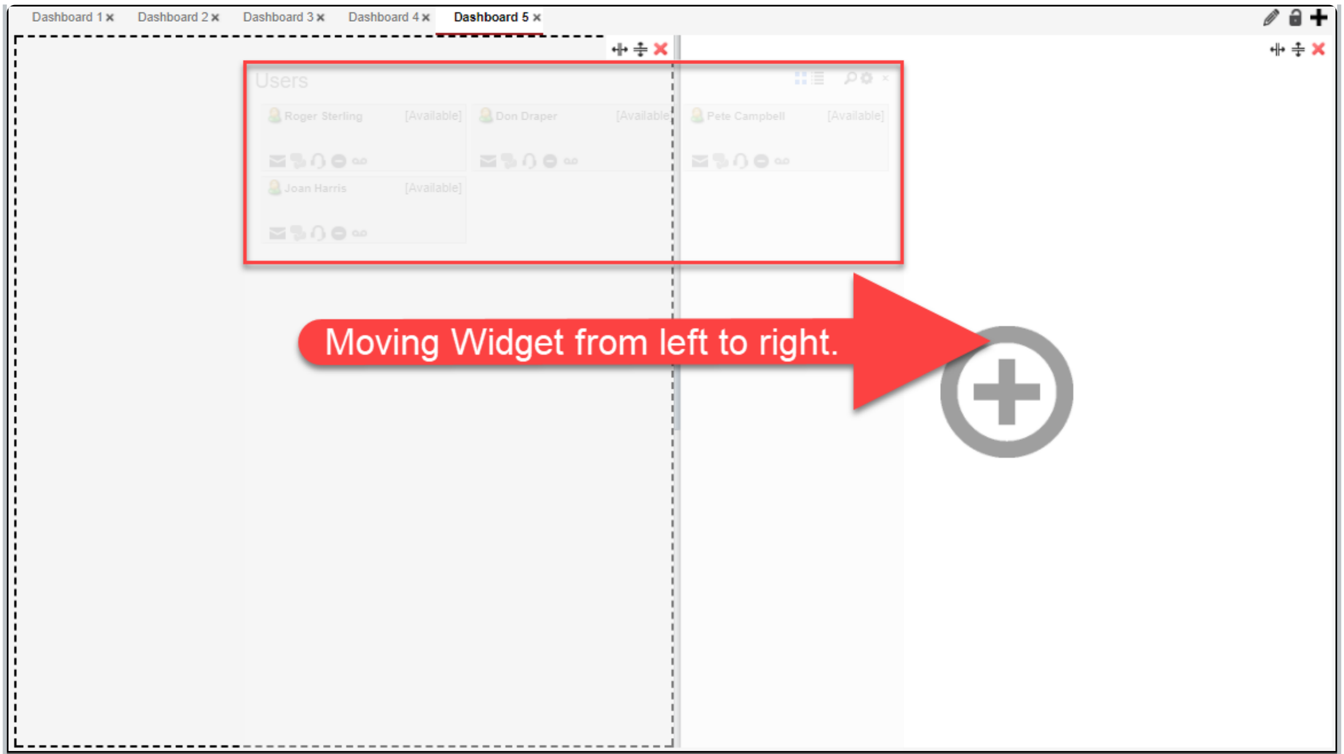


Figure 03: Moving Widget

Removing a Widget from a Panel

You can remove existing Widgets from a Panel by selecting the **Delete** button ( ) in the top-right corner of the Widget header.

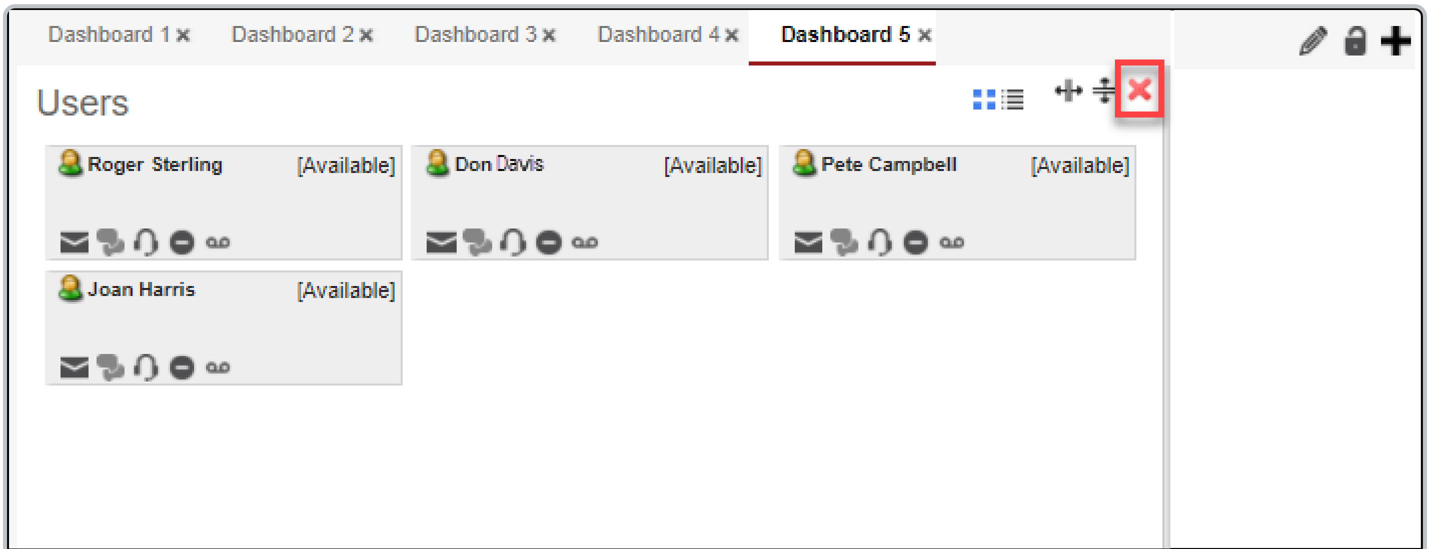


Figure 04: Removing a Widget

Removing a Widget from a panel will display the **Plus** sign so that you can add a different Widget.

Available Widgets

Last Modified on 11/18/2019 1:11 pm EST

There are different Widgets available in Presence that provide different functionality. Each Widget takes up one panel within a dashboard. There are several Widgets available for use in Kerauno Presence. The available Widgets include:

1. **My Stream Widget**: Display and manage active calls and call history.
2. **Users Widget**: Displays a list of all users with current call status and availability.
3. **Voicemail Widget**: Display, listen to, and manage voicemail messages.
4. **Recordings Widget**: Allows access and management of call recordings.
5. **Conference Room Widget**: View and manage calls in a specific conference room.
6. **Parking Lot Widget**: Display and manage calls that are in a parking lot.
7. **Ring Group Widget**: Provides detailed view of statistics, agents, and active ring group calls.
8. **CRM Widget**: Opens web-based customer records on call activity triggers.

Each **Widget** is further described/explained below.

My Stream Widget

The **My Stream Widget** is used to view your own call history and current call activity in the system. This Widget will display information such as your current active calls, call history, and Chat sessions. The **My Stream Widget** also provides an interface for call management actions on calls that belong to you.

Accounts

The left side of the **My Stream Widget** displays all current Accounts (Extensions, Alternative Numbers, Chat Sessions) that are assigned to you.

Account Filtering

By selecting a specific Account in the **Account** list on the left side of the **My Stream** Widget, you can filter the contents of the stream to only show information about the selected **Account**. For example, if you select an **Extension** in the **Account** list, the Stream on the Widget will only show active calls and call history for the selected **Extension**. You can select **All Accounts** to see all active calls and call history for all phone-based Accounts (excludes Chat sessions).

Calls

The first entry under the **My Stream** section shows all active calls for the selected **Account**. All active calls displays light green as the first item listed above the **Call History** section of the Widget.

Dragging Calls

You can drag calls listed in the **My Stream** Widget to the following locations in order to transfer the selected call to the destination:

- Users (Can utilize the **Default Account**. Refer to the **Default Account Selection** section below and **Users Widget** article for more information.)
- User Extensions
- User Alternative Phone Numbers
- User Voicemail Boxes (Transferred call goes straight to voicemail.)
- Conference Rooms
- Parking Lots
- Queues

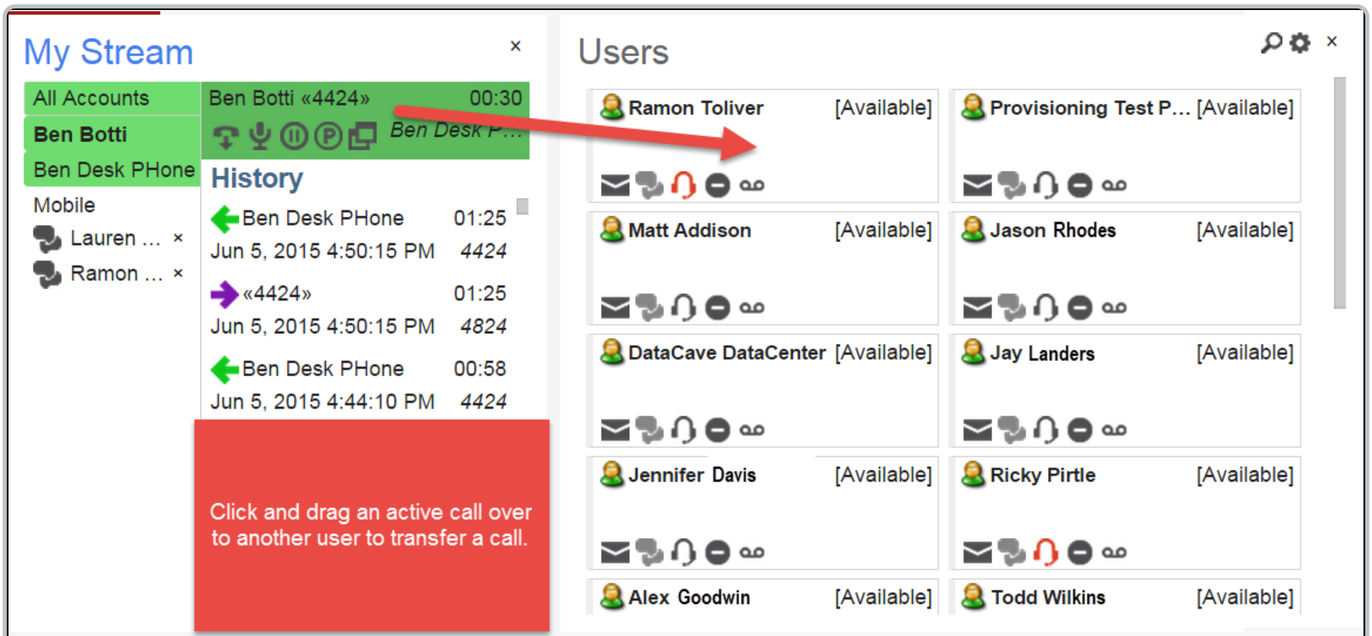


Figure 01: My Stream - Drag Active Call

Call Actions

When a call is listed in the **My Stream** Widget, it contains several buttons that allow you to perform actions on the call as explained below.

Figure 02: My Stream Widget Buttons

1. **Hangup**: Hangs up the call. If the call is currently ringing and not yet picked up, the **Hangup** button performs an "ignore" of the call, possibly sending the call to your voicemail box.
2. **Record**: Toggles on-demand recording of this call on and off.
3. **Hold**: Places this call on hold or takes the call off of hold.
4. **Park**: Parks this call in the **Parking Lot**.
5. **CRM**: This button will appear if you have CRM Widgets open and the call is able to open a CRM pop-up. If there are more than one CRM Widgets open you will be asked to choose which CRM widget you wish to open the pop-up with.
6. **Muted** (Not Pictured): You can hear both parties on the conversation but they cannot hear you.
7. **Agent Only** (Not Pictured): You can hear both parties on the conversation and only the agent you "barged in on" can hear you.
8. **Broadcast** (Not Pictured): You can hear both parties on the conversation and both parties can hear you.

Call History

If **All Accounts**, an **Extension**, or an **Alternative Phone Number** is selected in the **Accounts** list, the stream will show all **Call History** for the selected Account.

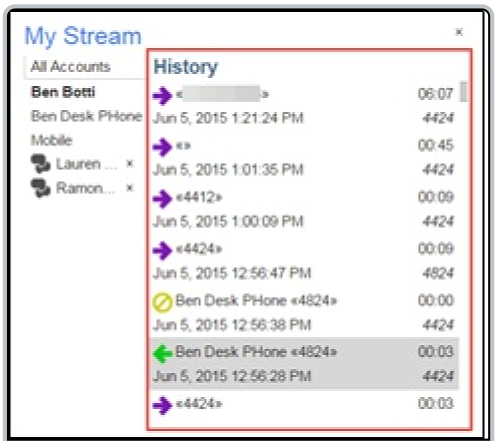


Figure 03: My Stream Call History Widget

Users can double click one of these call history items in order to originate a call from their selected **Default Account** (refer to the **Default Account Selection** below) to the number specified in the **Call History** item's **Caller ID**.

Default Account Selection

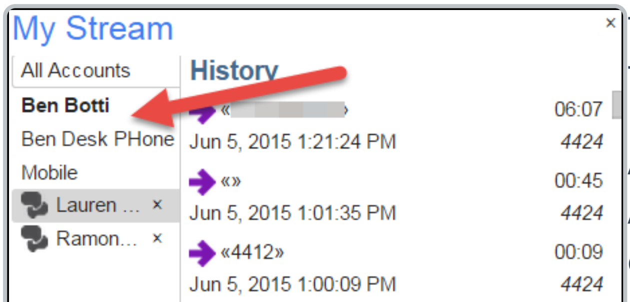


Figure 04: Default Account

When the user originates calls within the panel the **Default Account** will be used to create that call.

A **Default Account** is shown as bold in the Account list to indicate that Account is the currently selected **Default Account**. You can specify which Account is your **Default Account** by right-clicking an Account and selecting **Set Default**.

Chat

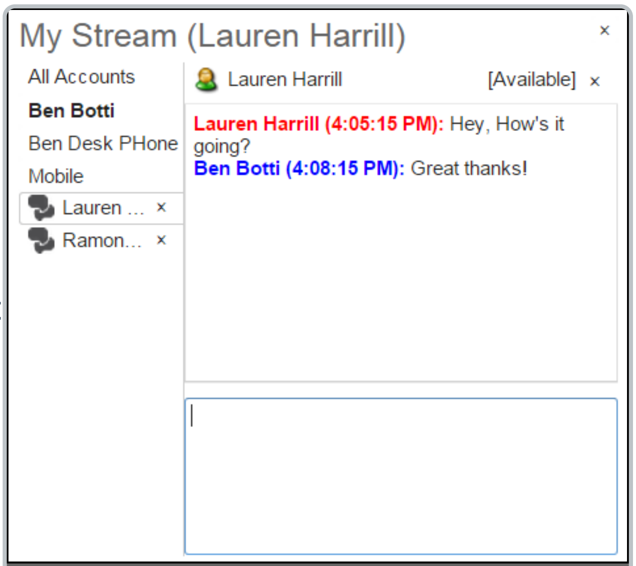


Figure 05: My Stream - Chat

The **My Stream** Widget also allows you to manage and interact with your current Chat sessions in the system. All current ongoing chat messages display with a symbol in the left sidebar of the **My Stream Widget**.

Incoming chat messages play a notification beep over your computers speakers and display under the **My Stream** section. Responding to a chat message is as easy as typing the desired message in the empty box under the chat conversation and pressing **Enter**.

Conference Room Widget

Last Modified on 11/18/2019 2:50 pm EST

The **Conference Room Widget** allows you to view and manage users in a **Conference Room.** Any conference room that is built into the Kerauno Phone system (Leader-Based or Ad-Hoc) can be displayed within the **Conference Room Widget**.

The **Conference Room** name will appear at the top of the screen as the widget header. Within the table, a list of all current conference call participants is displayed. This table includes the person’s name and caller ID, as well as the length of time that specific user has been in the conference room.

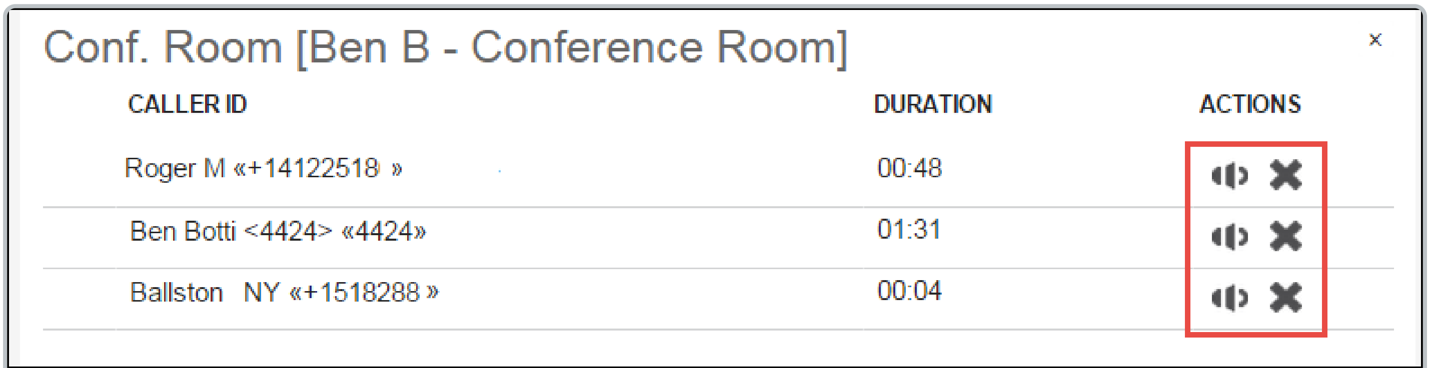


Figure 01: Conference Room Widget

Conferencing actions illustrated in Figure 01 are described below:

1. **Mute/Unmute**: This button mutes/unmutes audio from a specific conference participant.
2. **Kick Button**: This button removes the selected participant from the conference room.

Users can drag other users and active calls to the **Conference Room Widget** to add them to the **Conference Room**. Users can also drag calls away from the **Conference Room** to transfer them to other locations in the system.

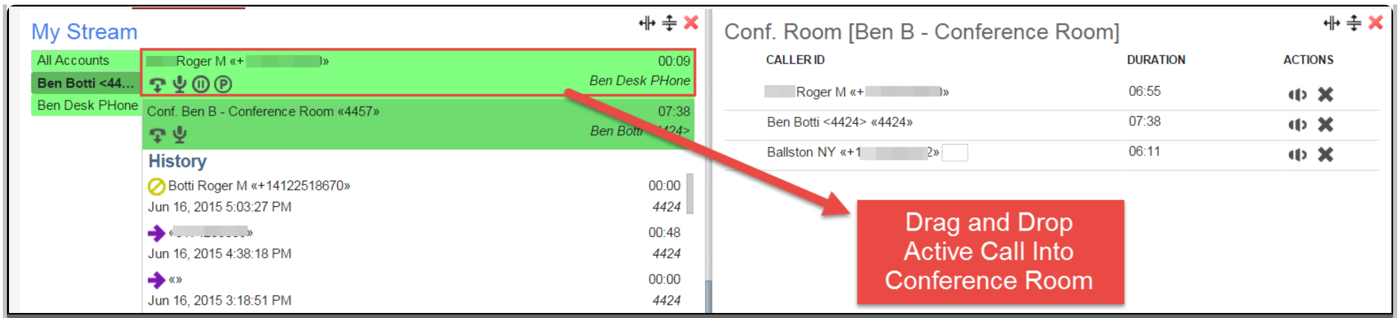


Figure 02: Conference Room Drag and Drop Functionality

CRM Widget

Last Modified on 11/18/2019 3:34 pm EST

The CRM widget allows users to open specified URLs based on incoming call activity. This widget is useful if you wish to open web-based CRM or other records based on incoming call information. Although this widget is called the CRM widget it can be used to open any type of web page. Any web pages launched through this widget will open in the default browser on the computer.

Open URL on Demand

If you do not wish to open a URL on call events but wish to open them on demand you can use the CRM button in the **My Stream Widget** as illustrated in Figure 01.

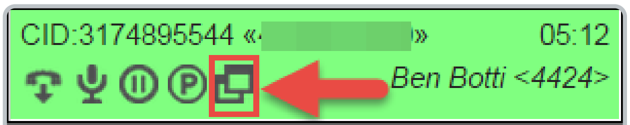


Figure 01: My Stream Widget CRM Button

Settings

Access settings for the CRM Widget by clicking the cog icon in the top-right corner of the CRM Widget. The settings dialog will also open automatically when adding the CRM Widget to the dashboard for the first time.

- **Name**: The name of this CRM widget. This name is used to identify which CRM window to open when using the Open CRM button in My Stream.
- **Open On**: Specifies when to open the specified URL.
    - **Never**: Disable this CRM widget.
    - **Ring**: Open when you have an incoming ringing call.
    - **Answer**: Open when you answer an incoming call.
- **Open URL in new window**: When checked the specified URL will open in a new browser popup window instead of inside the widget. This can be used for web pages that do now allow themselves to be embedded in iframes.
- **Open on calls from internal extensions**: When checked, the specified URL will open on calls from internal extensions.
- **URL**: The URL to open. Use the following variables in the URL to replace with

information from the call.

- **${CALLER_ID_NAME}**: The caller ID name of the incoming call.
- **${CALLER_ID_NUMBER}**: The caller ID number of the incoming call.
- **${DID}**: The phone number this call initially dialed to enter the phone system.
- **${USER}**: The username of the current user.
- **${PBX(key)}**: The phone system variable with the given key that is attached to the incoming call. If the variable does not exist on the incoming call the value will be set to a blank string. For example, www.google.com/search?q=${Caller_ID_Name} would search Google for the incoming caller's name.

Parking Lot Widget

Last Modified on 11/18/2019 3:59 pm EST

The **Parking Lot Widget** allows you to view and manage calls that are currently on hold within a parking lot on the Kerauno phone system. Calls placed on park by any extension can be viewed by any user within Kerauno Presence.

The **Parking Lot** name is displayed at the top of the screen as the widget header. Within the table, a list of all current calls on park will be shown. This table includes the lot number that a specific caller is in; dialing this number will pick the call up off of park. Also listed in this table is the **Caller ID** of the caller, the name of the extension that placed the call on park, and the hold duration within the parking lot.

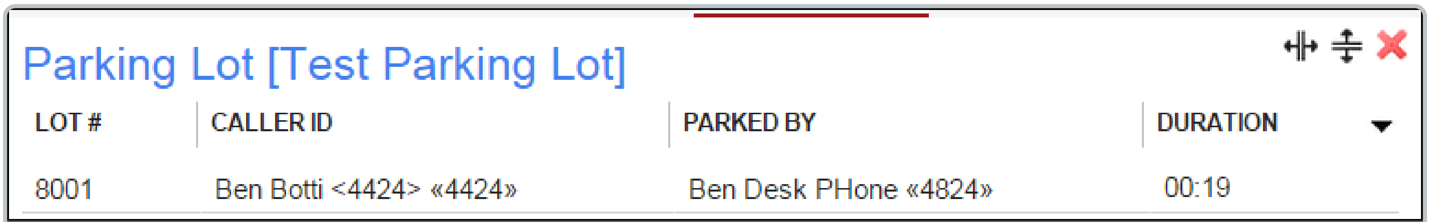


Figure 01: Parking Lot Widget

NOTE:	You can double click on any parked call to transfer that call to your primary extension.

Users can drag calls to the **Parking Lot Widget** to place them in the **Parking Lot**. Users can also drag calls away from the **Parking Lot** to transfer them to other users in the system.

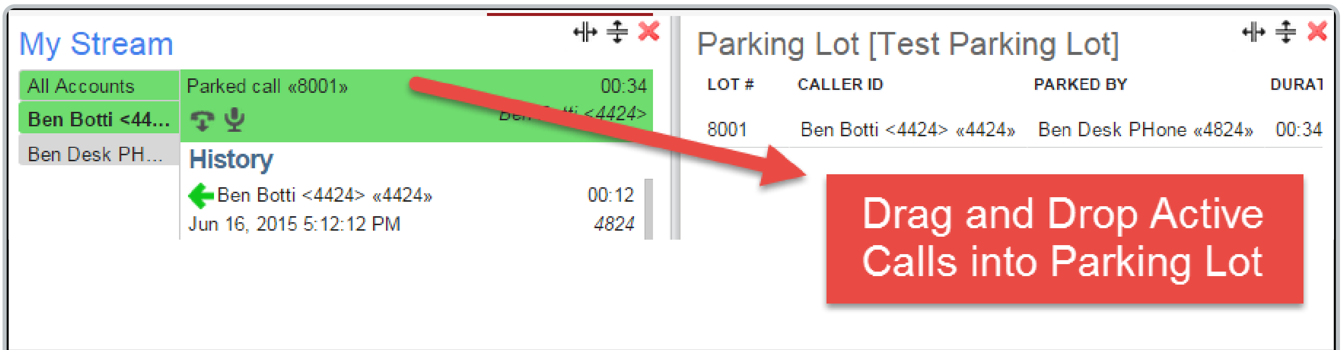


Figure 02: Parking Lot Drag and Drop

Recordings Widget

Last Modified on 11/19/2019 7:50 am EST

The **Recordings Widget** allows you to view and manage call recordings for all of your extensions. The list shown within the widget will display all available recordings by the **Source**, **Destination**, **Date/Time**, and **Duration** of a specific call.

The **Recordings Widget** will show all calls to any extensions associated with an account for the past 30 days.

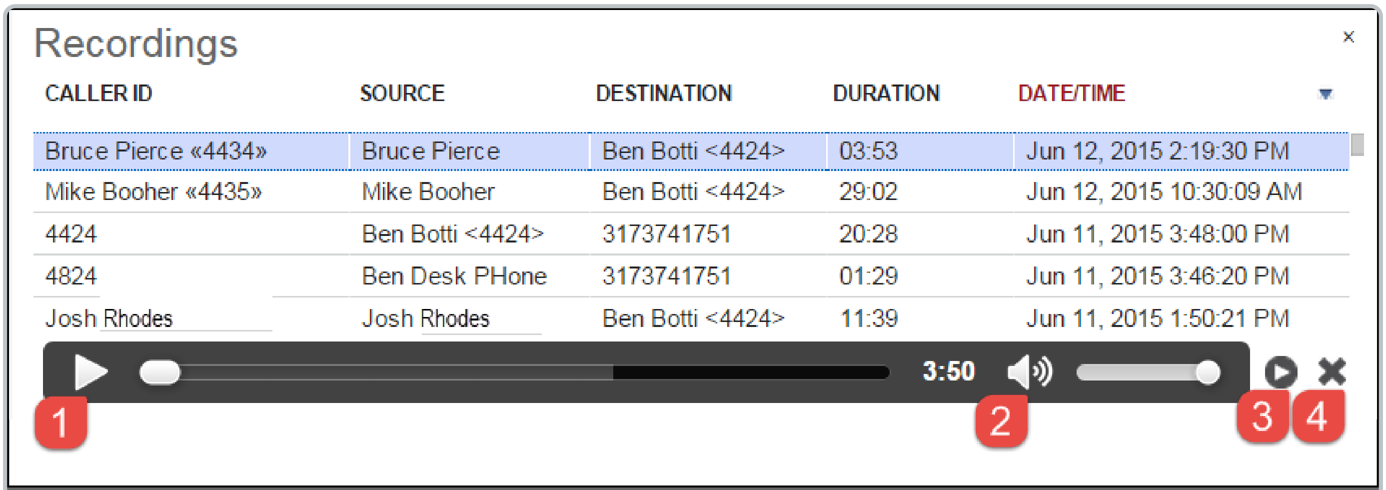


Figure 01: Recordings Widget

Recording actions are described below:

1. **Play**: Click this button to play the voicemail in your browser over your PC's speakers.
2. **Volume Control**: This button mutes/unmutes the voicemail and controls volume.
3. **Play via Phone**: Select a specific recording and then click the button to ring your main extension and play the recording over the phone handset.
4. **Delete**: You can permanently delete a recording by clicking the button.

Please note that all columns on this page are sortable in ascending and descending order. Columns can be sorted by clicking the button next to any column header. This sorting feature may make it easier to find a specific call.

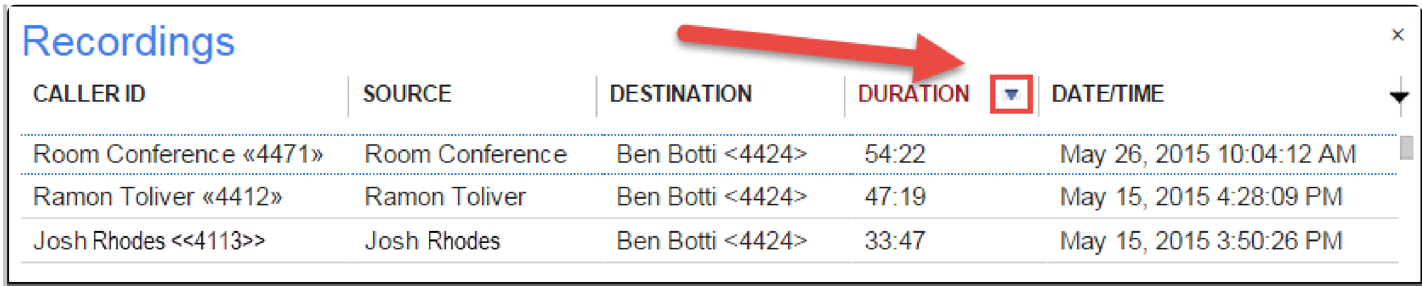


Figure 02: Recordings Screen - Sort Button

Ring Group Widget

Last Modified on 11/19/2019 8:31 am EST

The **Ring Group Widget** allows a user to view and manage agents and call activity within a ring group. The widget provides a real-time view of what agents are available to answer calls, how many calls are active, and how many callers are on hold (queued) waiting for their calls to be answered.

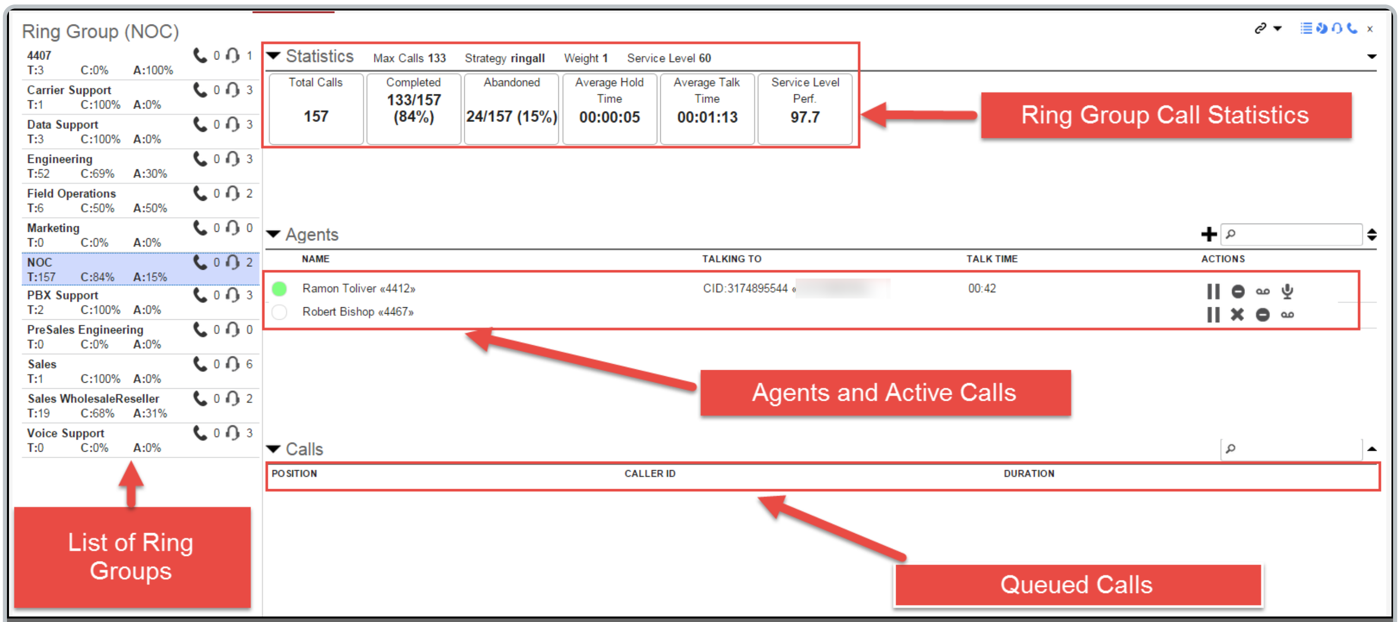


Figure 01: Ring Group Widget

Users can choose which sections are visible within the widget by toggling the section buttons in the top-right corner of the screen.

1. **Ring Group List**: Shows or hides the list section.
2. **Statistics**: Shows or hides **Statistics** section.
3. **Agents**: Shows or hides the **Agents** section.
4. **Calls**: Shows or hides the **Calls** section.

Figure 02: Ring Group Settings

Ring Group List

The **Ring Group List** on the far-left side of the screen allows the user to cycle through the different ring groups that are built within Kerauno. The current active ring group will show in light blue and the header of the widget will change to the currently selected ring group.

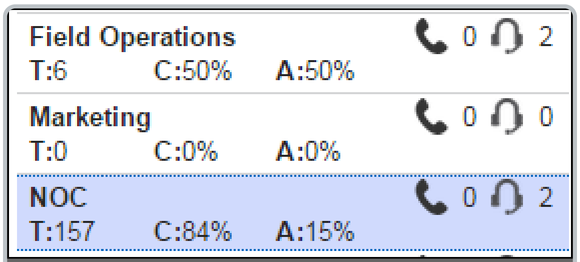


Figure 03: Ring Group List

This field also displays the number of logged in agents next to the icon; the number active calls next to the icon; and total, completed, and abandoned call statistics.

Statistics Section

The **Statistics** section of the **Ring Group Widget** shows a detailed view of all ring group statistics. This information includes the number of total calls, average hold times, average talk times, and service level compliance. The statistics here will be reset on an interval chosen by your phone system administrator (daily, weekly, monthly).

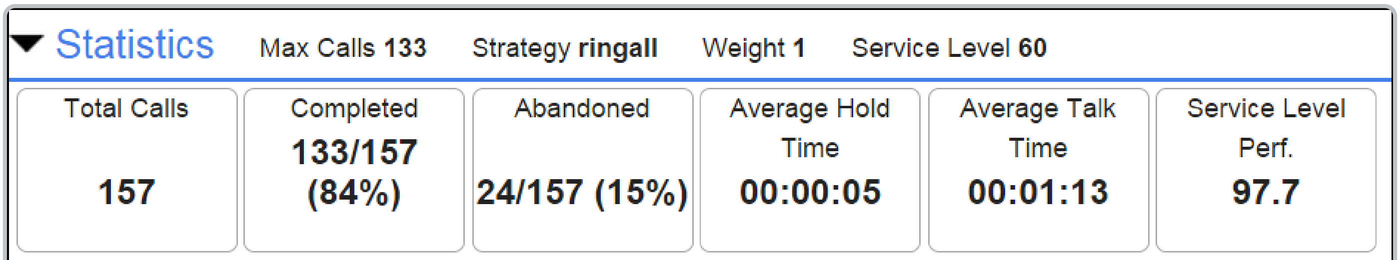


Figure 04: Ring Group Statistics Section

Agents Section

The **Agents** section displays information about any person/agent who is logged into the ring group to receive calls. The section allows a user to view what calls are actively occurring within the ring group and how long the agent has been on the line.

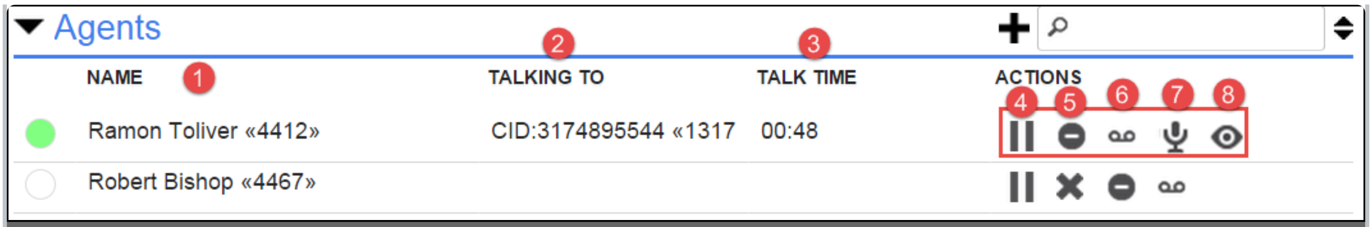


Figure 05: Ring Group Agents Section

Each feature of this section is labeled in Figure 05 above and described below:

1. Displays the agent's **Name**, extension, and current call status (green is an active call, etc.).
2. Shows the **Caller ID** of the person the agent is speaking with.
3. Displays total **Talk Time** and duration of current call.
4. The button pauses the **Agent** from receiving calls from the ring group. Calls that originate from outside that specific ring group (such as ext.-to-ext. calls) will still ring through.
5. The button puts the agent on **Do Not Disturb**. Any call that reaches the agent's extension will go directly to voicemail.
6. The button calls the agent's voicemail box.
7. The button toggles recording on for the agent's current call.
8. The button opens the barge menu, which allows you to listen in on a call, whisper to the agent, or barge the call.

NOTE:	Depending on the user's permissions, some of the above options may not be available for all calls.

Calls Section

The **Calls** section will show any active calls that are on hold within the ring group. If all agents are currently busy on a call, any new calls that come into the ring group will display under the **Calls** section.

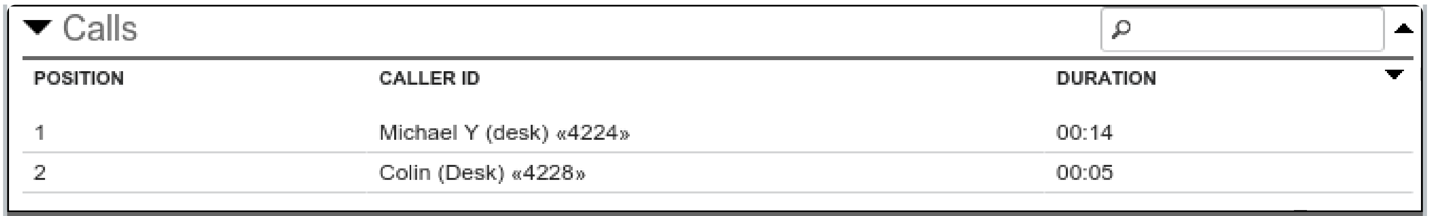


Figure 06: Calls Section

The caller's **Position** in the ring group is shown (1st, 2nd, 3rd, etc.) within this section as well as **Caller ID** information and the length of time the caller has been on hold.

As with many other sections of the interface, users can drag and drop calls to send them into the ring group.

Users can drag and drop any active call on the **Calls** section of the widget to transfer the call to the first available agent. Users can also drag and drop active calls onto specific agents within the **Agents** section, which transfers the call directly to the agent's extension.

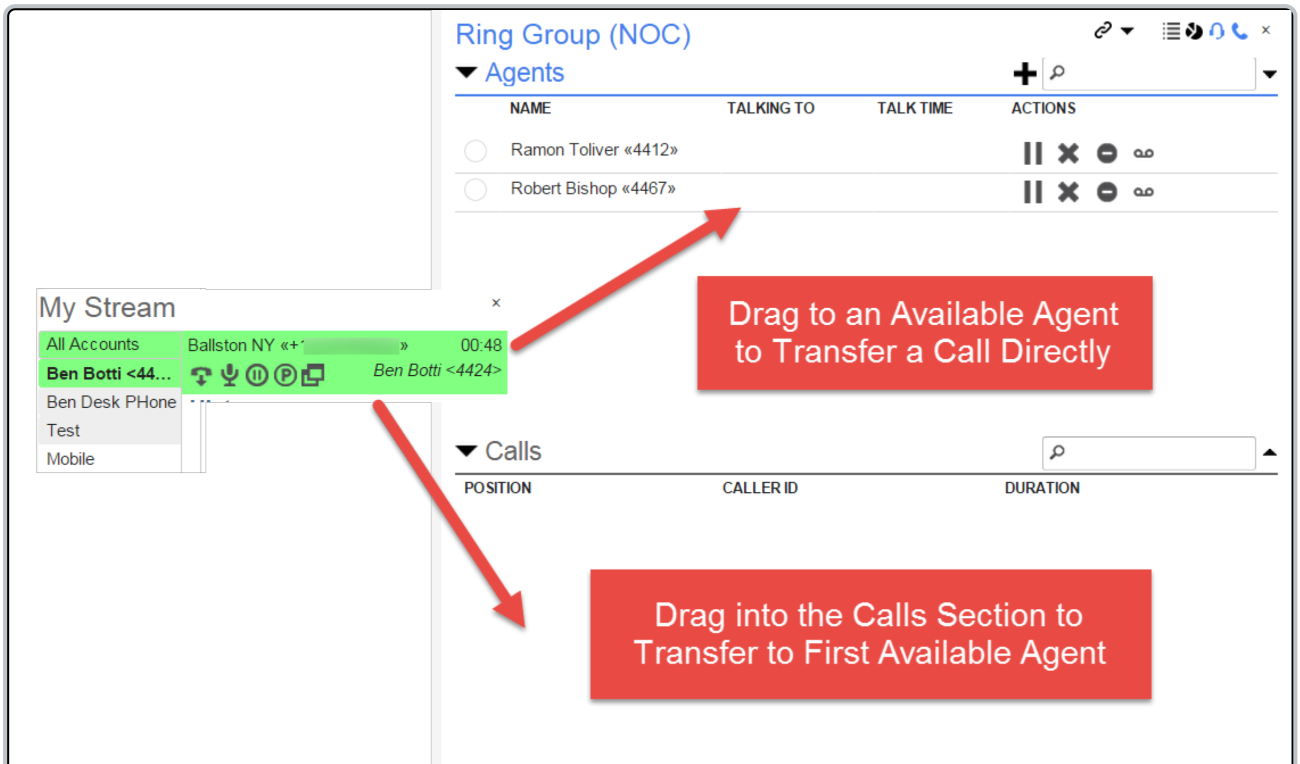


Figure 07: Calls Section Drag and Drop Functionality

Users Widget

Last Modified on 11/19/2019 12:59 pm EST

The **Users** Widget allows you to view the state of other **Users** in the system along with **Extension State**, **Call State**, and **Presence**. There are several buttons that appear under each "User" box, allowing specific actions to be performed.

User Boxes

The **Users** Widget will have a **User** box for each user in the system (excluding your own, as that box will appear under **My Stream**). This box provides a display of the **User's Accounts**, **Calls**, and **Presence** state while providing functionality to interact with and manage the **User's Accounts**, **Calls**, and **Presence**.

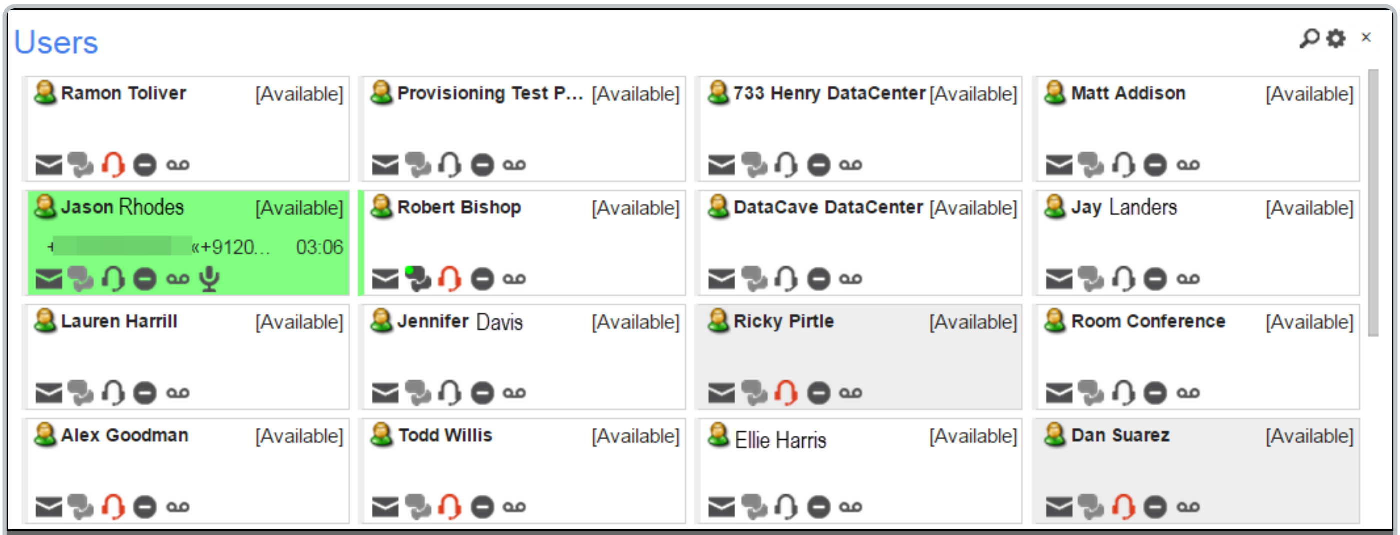


Figure 01: Users Widget

User Login/Call Status

The bar on the left side of the **User** box displays the current login status of the user. By default, users who are logged out will be grey and logged-in users display as light green.

The **User** boxes will change color to show the user's current call or login status. Chart 01 below displays the colors of each specific call status.

The **User** boxes will change color to show the user's current call or login status. Chart 01 to the right displays the colors of each specific call status.

Dialing	Yellow	External Call	Light Green
On Hold	Dark Grey	Ring Group Call	Orange
Internal Call	Dark Green		
Logged Out	Light Grey		
Ringing	Yellow		

Chart 01: Call/Login Status

User Actions

There are several buttons that are displayed on a **User** box that allows other Users in the system to perform actions on the selected User.

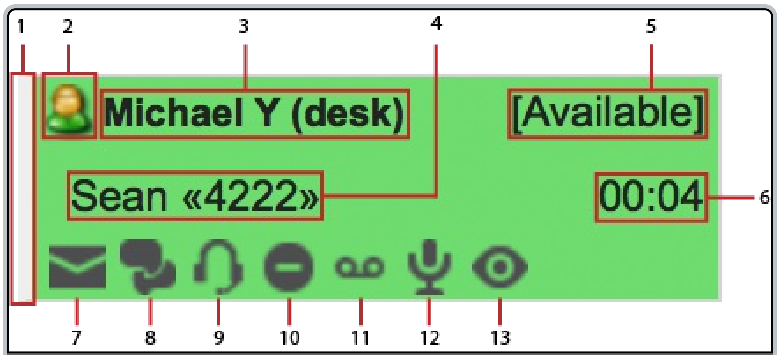


Figure 01: User Box

1. User login status
2. Presence status icon
3. User name
4. Caller ID of call
5. Presence status text
6. Call time
7. E-mail icon
8. Chat
9. Agent button
10. Do Not Disturb toggle
11. Voicemail
12. Record
13. Barge

1. **User Login Status –** The bar to the far left hand side of a user box will show if a user is currently logged into Kerauno Presence. Logged-in users show green, while offline users will display grey.
2. **Presence Status –**Displays User's current status icon. ( = Available,  = Away,  = In a Meeting)
3. **User Name –** The User's First/Last Name that is configured in the system.
4. **Caller ID of Call –** The Caller ID name/number of the active call.
5. **Presence Status Text –** Displays User's status (Available , Away , In a Meeting, Etc.)
6. **Call Time –** Duration Length of the User's current call.
7. **E-mail Icon** - If the User has a configured email address you can select the email button to send an email for that address. This will utilize your default email client (such as Outlook or Gmail).
8. **Chat** - This button allows a User to start a Chat session with this User. See **Chat** section for more information.
9. **Agent Button –** Allows managers to log-in/log-out agents from a call center queue.
10. **Do Not Disturb Toggle –** Turns on DND. If activated, all calls will go directly to deskphone VM.
11. **Voicemail –** Allows a direct voicemail message to be left for the user.
12. **Record –** Records the current call if not enabled by default.
13. **Barge –** Allows managers to listen to and join/barge other ongoing calls (3-way calling).

Table 01: User Actions

Sorting and Filtering

The **Users** Widget allows for sorting and filtering of the listed Users. The **Sort and Filter** bar can be opened and closed via the **Magnifying Glass Icon** at the top-right in the **Users** Widget header.

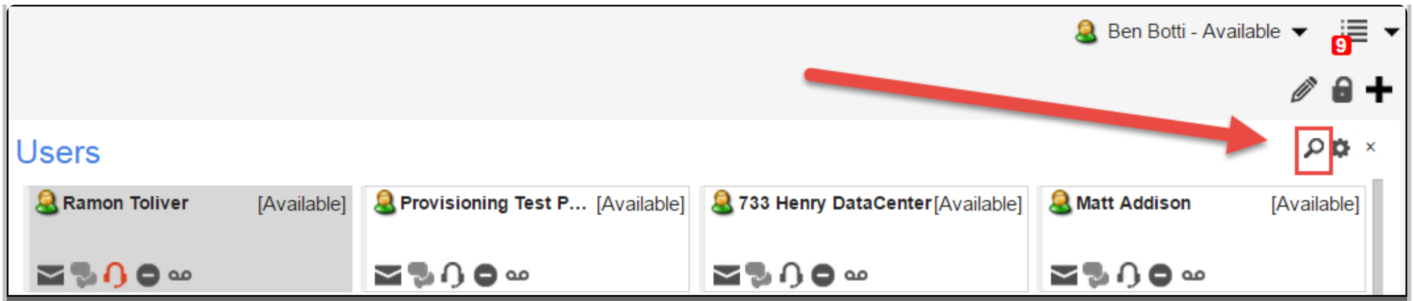


Figure 02: Users - Sorting and Filtering

Sorting

After pressing the **Magnifying Glass** Icon, a sorting drop-down menu displays on the far-left side of the **Users** Widget You can sort the user list by several different user properties. The **Arrow** to the left of the sort drop-down can be used to change the sort direction from **Descending** to **Ascending**.

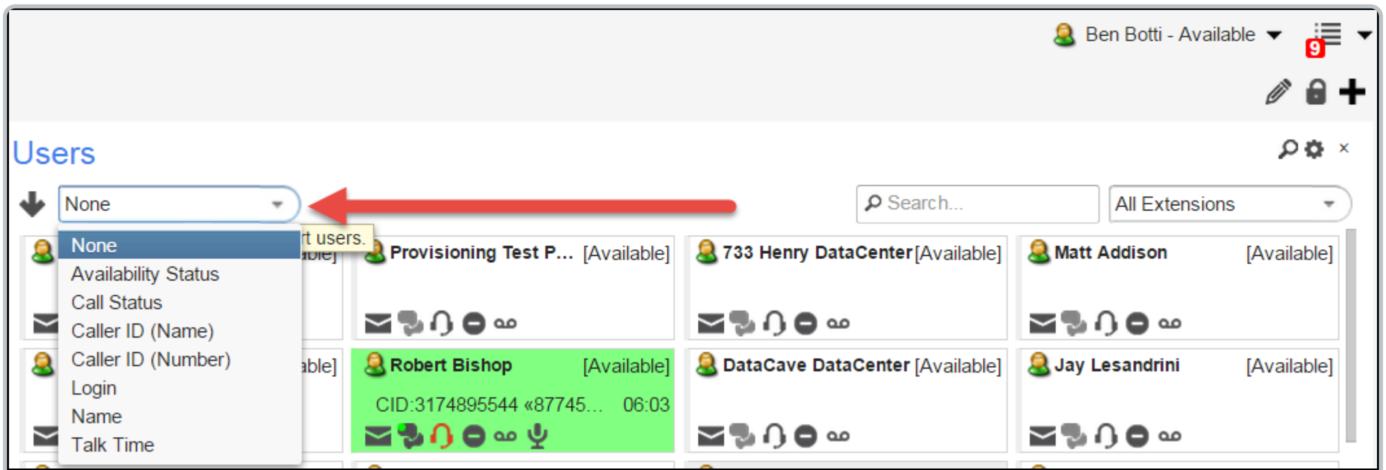


Figure 03: Sorting Users

Sorting Drop-Down Defined:

1. **None:** No sorting.
2. **Availability Status:** Sorts by the current **Status** set on the **User**.
3. **Call Status:** Sorts by the User's **Account** call status.
4. **Caller ID (Name):** Sorts by the User's **Account** call **Caller ID** name.
5. **Caller ID (Number):** Sorts by the User's **Account** call **Caller ID** number.
6. **Login:** Sorts by the User's Kerauno Presence login status.
7. **Name:** Sorts by the User's display name.
8. **Talk Time:** Sorts by the Users **Account Call** time.

Filtering

You can utilize the **Search** field in the **Sort and Filter** bar to search for specific users by **Name** or **Extension**. You can also select an **Extension Group** from the drop-down on the right of the **Sort and Filter** bar. This will only show **Users** and **Accounts** for Extensions that are in the selected **Extension Group**.

Extension groups are typically set up by your phone system administrator and segments the user's list into specific departments, physical locations, or other groups of employees.

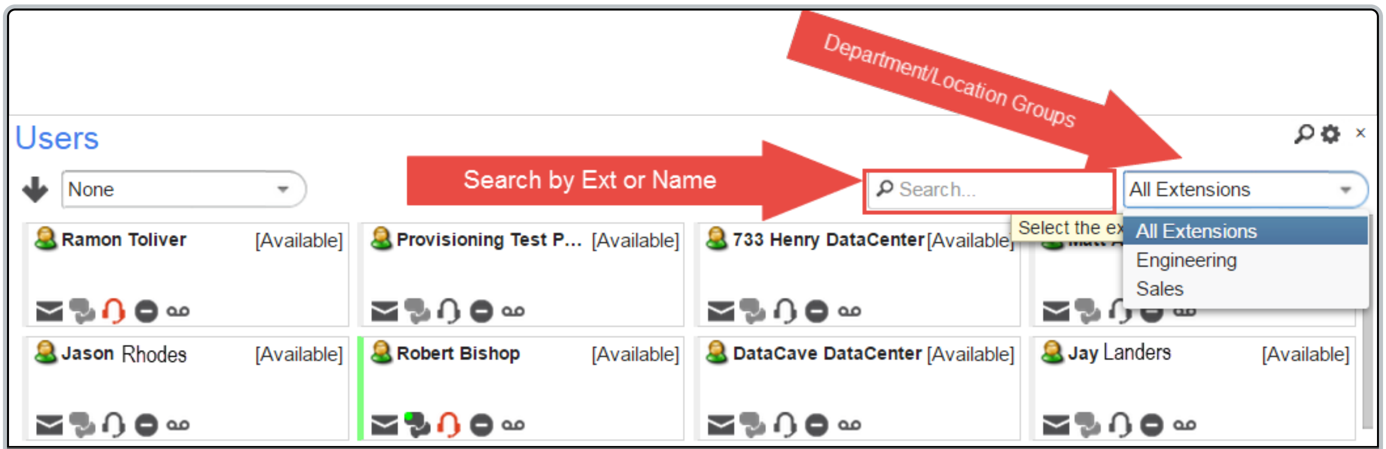


Figure 04: Filtering

Calls

The **User** box will display all active calls for the User's **Accounts** and allow you to manage those calls.

Selecting the Active Call

The **User** box only shows one call at a time and allows you to manage that specific call. If you have more than one active call, the **up** and **down** arrows are displayed to the right of the **Caller ID** section in the **User** box which allows you to select the current active call.

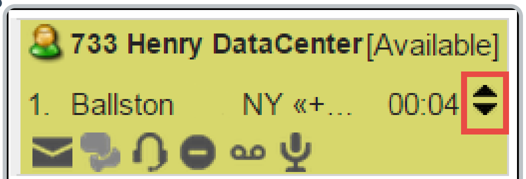


Figure 05: User Box Active Call Display

The call that is actively listed here, will be the call that is affected when using the action buttons at the bottom of the user box (hold, park, record, etc). This will also be the call used when performing "Drag and Drop" call transferring as detailed in the next section.

Dragging Calls

Users can drag calls from the **User** and **My Stream** boxes to the following locations in order to transfer that call to the destination.

1. **Users:** Drag a call into the white space inside a user's box.
2. **User Extensions:** Drag a call over a User's name to disploay a dropdown with all of the users' extensions. Drop the call onto the desired user's extension.
3. **User Alternative Phone Numbers:** Drag a call over a user's name to display dropdown with all of the user's extensions and alternative numbers (such as a cell phone number). Drop the call onto the desired alternate number.
4. **User Voicemail Boxes:** Drag and drop a call over the symbol within a user's box. The call will bypass any extensions and go directly to the user's voicemail.
5. **Conference Rooms:** Drag and drop the call into the **Conference Rooms** Widget.
6. **Parking Lots:** Drag and drop the call into the **Parking Lot Widget**.
7. **Ring Groups:** Drag and drop the call into the desired queue within the **Ring Groups** Widget.

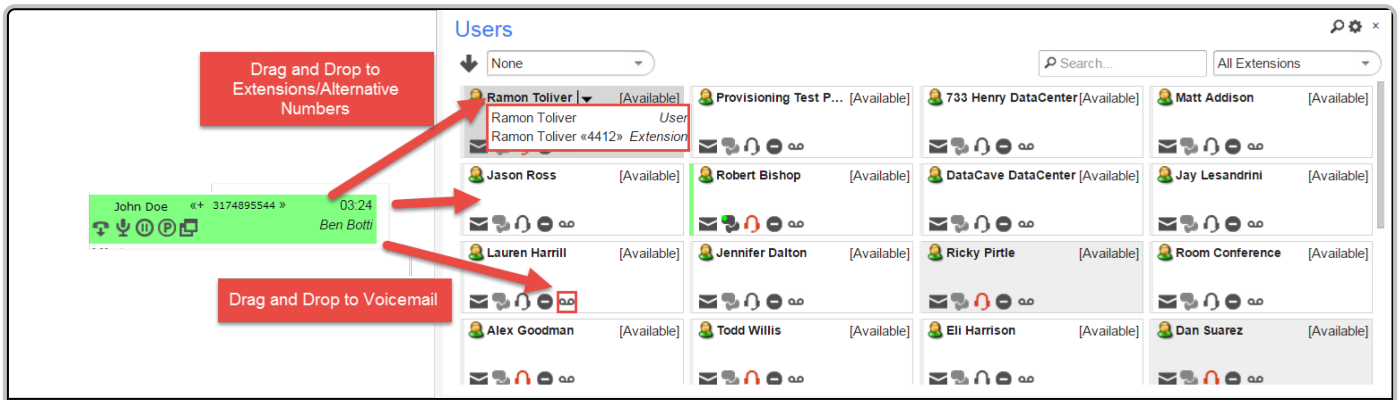


Figure 06: User's Box Indicating Drag and Drop Transfer Functions

Voicemail Widget

Last Modified on 11/19/2019 1:26 pm EST

The **Voicemail Widget** allows you to view and manage voicemail for your account.

Filtering

You can filter the voicemail list by voicemail box or folder by selecting a voicemail box or folder from the list on the left. If you have multiple extensions, you can use this filter to cycle between boxes. Selecting **All Voicemails** allows you to see all voicemail in all voicemail boxes and folders.

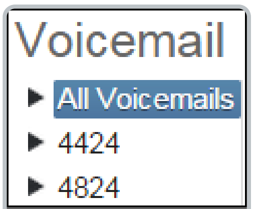


Figure 01: Voicemail List

Voicemail Actions

The **Name** and **Time** fields display the caller ID information of the person who left the voicemail and the time that the voicemail was left. The currently selected voicemail appears in light blue.

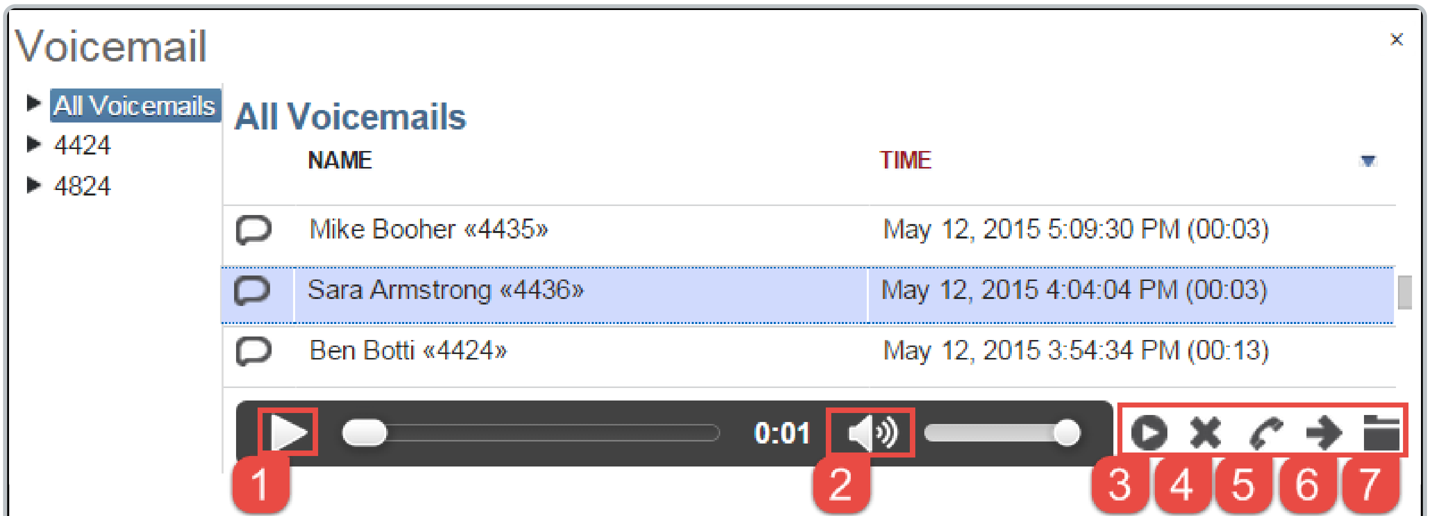


Figure 02: Voicemail Screen

The following options are available once a voicemail has been selected:

1. **Play**: If this button is selected, the voicemail will play in your browser over your PC's speakers.

2. **Volume Control**: This button mutes/unmutes the voicemail and controls volume.
3. **Play via Phone**: If you select the button on a voicemail, your main extension will be called and the voicemail will be played back to you over the phone.
4. **Delete**: Press the to permanently delete a voicemail.
5. **Callback**: The button allows you to originate a call to the caller ID number of the call that left the voicemail. The call will originate from your main extension.
6. **Forward**: The button allows you to forward the voicemail to other users.
7. **File**: The button allows you to categorize the voicemail into a specific folder.

You can toggle your messages between "read" and "unread" by pressing the small bubble icon ( ) next to the name of the voicemail. If the icon is just an outline, as illustrated in Figure 03 below, the message has been read.

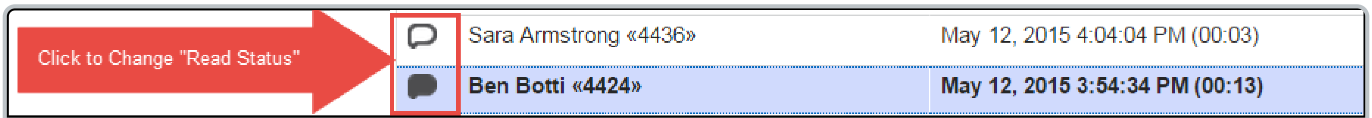


Figure 03: Read/Unread Voicemail Indicator

Chat+ Overview

Last Modified on 11/21/2019 1:12 pm EST

Chat+ is Kerauno's Web Chat, Collaboration, and File Sharing platform. Chat+ allows users to collaborate in real time with each other via public channels (viewable by all), private channels (viewable by a select few), or Direct Messages (person to person messages).

The benefits of using Chat+ include:

- Streamlined collaboration on projects for your organization.
- Reduced email clutter—Chat+ is proven to have reduced emails by as much as 80%!
- Sharing files (no more attaching files, link sharing, etc.).
- Searchability and indexability to find the information you need quickly.

How to Access Chat+

You can access Chat+ from any page within the Kerauno platform via the navigation bar. The method of access is the same between both the browser-based and desktop versions of the Kerauno app. If you're swapping between the **Kerauno User Panel**, or any other elements of the Kerauno user interface, your information will be saved. The location of the button to access Chat+ is on the Kerauno Navigation bar to the right of the logo and Dashboard button as illustrated in Figure 01 below.

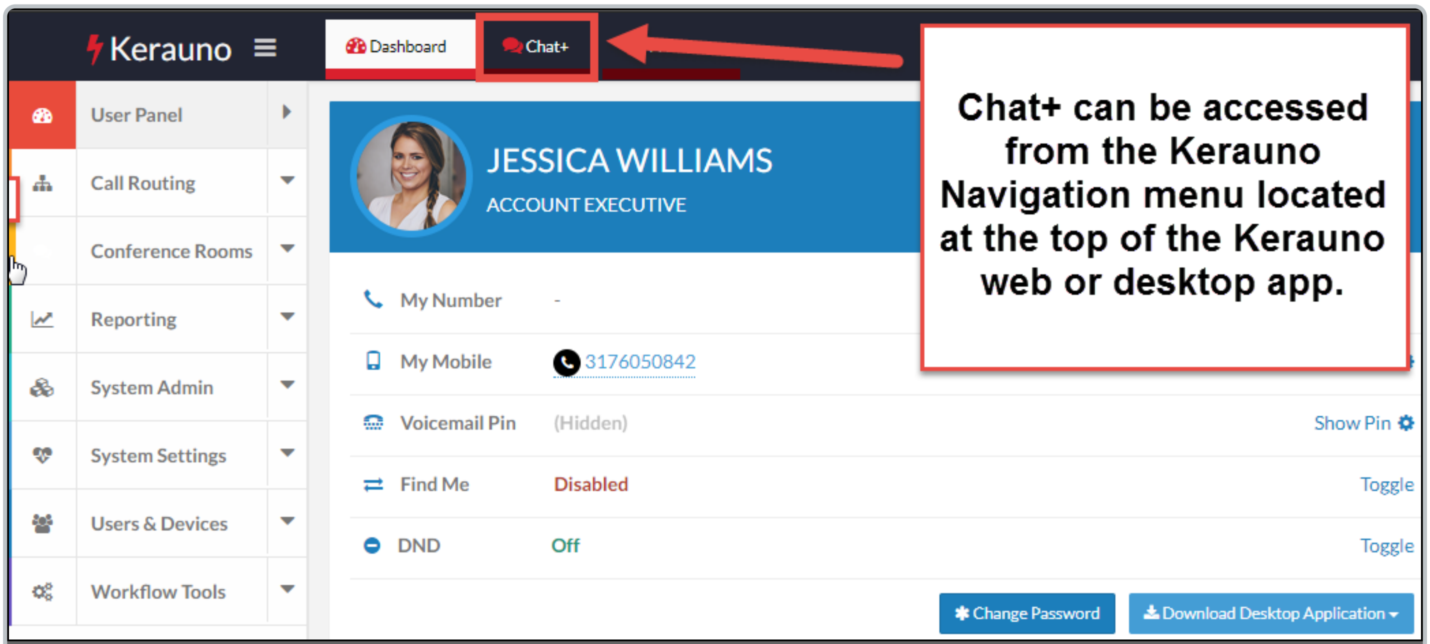


Figure 01: Kerauno Navigation Menu Chat+ Button

Using SMS

Last Modified on 11/20/2019 11:47 am EST

SMS is available for users on 3.1 and higher, excluding premise enterprise customers

What is SMS?

Short Message Service (SMS) is a communication tool that allows end users to collaborate over, route, queue, and escalate text messages from internal personnel and external stakeholders.

Did you know?

- '64% of consumers prefer texting vs. a voice call for customer service needs... [1]'
- '77% of consumers have a positive perception of companies using text messaging. [1]'
- 'The average response time for a legitimate email is about 90 minutes, compared to 90 seconds for a text message. [2]'
- '79% of marketers agree that mobile marketing, inclusive of SMS, is core to their business. [3]'
- 'By 2020, 48.7 million consumers will opt-in to receive business SMS. [4]'
- 'No less than 80% of professionals say they text for business purposes. [5]'

Who can use SMS?

SMS is widely used for an extensive variety of reasons. These are just a few examples:

- Customer texts into a main number, is provided a list of options, and makes the appropriate selection.
- HR recruiter texts with potential candidates to schedule interviews.
- A customer texts in a technical support request and can be connected to customer service.

How can SMS help me?

- Build inbound text messaging workflows for automated messaging responses.
- Handle queued, text-based customer engagement requests.
- Escalate a session up to a team-based customer engagement opportunity account manager, support technicians, or other subject matter experts who can be conferenced in to take part in the communication.

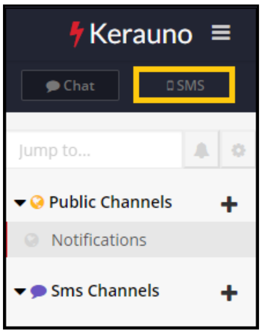
Example SMS Use Case

- A customer texts into a main number.
- All members of the assigned SMS flow receive the interaction notification via the SMS tab.
- An available employee pulls the interaction from the flow and seamlessly works with the customer via SMS.

Get Started

A Kerauno Admin/Installer enables each user for SMS. Administrators click here for enablement instructions.

Once enabled, users access SMS through the Chat+ pane. The Kerauno desktop app and Chat+ app also allows users to send and receive automated messages or messages sent from SMS flows. Once enabled, the SMS icon appears next to the Chat icon. Users can easily toggle between Chat and SMS:



SMS Best Practices

Before using SMS, review these best practices for optimal communication:

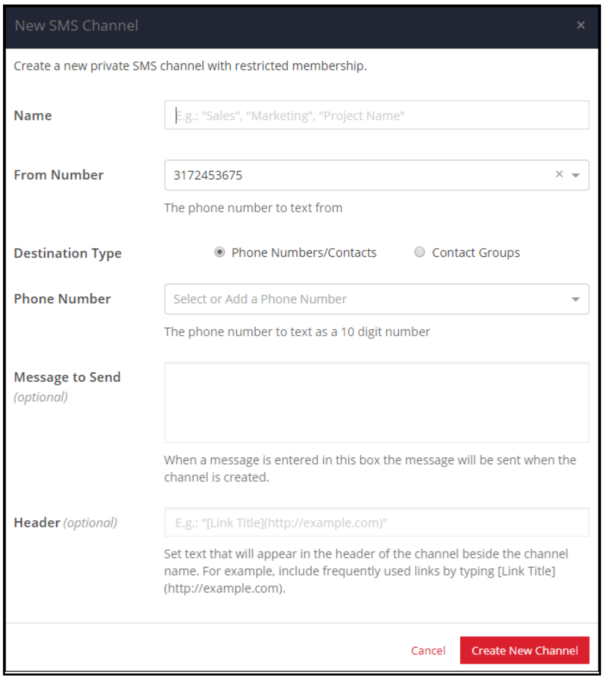
- Answer SMS messages in a timely fashion.
- Messages are limited to 140 characters. Sending more than 140 results in

multiple messages.

- Keep messaging simple, yet personally engaging whenever possible. Introduce yourself and include the customer's first name in the SMS communication. *Hello Bob, my name is Mary. I'll be helping you with your ticket today. I'll go look it up*.
- Keep all communications compliant. SMS is not Health Insurance Portability and Accountability Act (HIPAA) compliant. As a result, users never send or encourage the sharing of confidential or personally identifiable information within live or historical interactions, nor with internal and external SMS users.
- Provide resources. If a customer is requesting additional information, send hyperlinks to appropriate resource pages. Use a link shortener to reduce the total number of characters in the response. If not immediately available, offer to send the resources via email after the SMS interaction ends.
- Follow up with customer after an SMS communication whenever possible. *Hi, it's Mark with Sales.com. I'm just checking in to make sure we addressed your issue yesterday. Did we resolve your issue accordingly?*
- Confirm ending an SMS interaction. *Is there anything else I can help you with before you go?*
- When ending an interaction, type /end to end the interaction. Otherwise, it remains an active interaction and also negatively impacts reporting.
- Supervisors should monitor inbound SMS interactions to account for fair and consistent utilization across available agents.

New SMS Channel

To create a new SMS Channel, click the + icon next to SMS Channels.



Cited Sources:

[1] Mobile Marketing Watch

[2] CTIA.org

[3] Salesforce State of Marketing Report (2016)

[4] Text Local

[5] Text Request

Chat+ Layout

Last Modified on 11/20/2019 12:33 pm EST

This article describes the layout of the **Chat+** screen and the various features available. The view shown in Figure 01 below is similar to what users will see upon entering the **Chat+** screen.

NOTE:	When clicking between the many different modules within the Kerauno platform, the **Chat+** screen will always jump back to your most recent conversation when the **Chat+** button is selected.

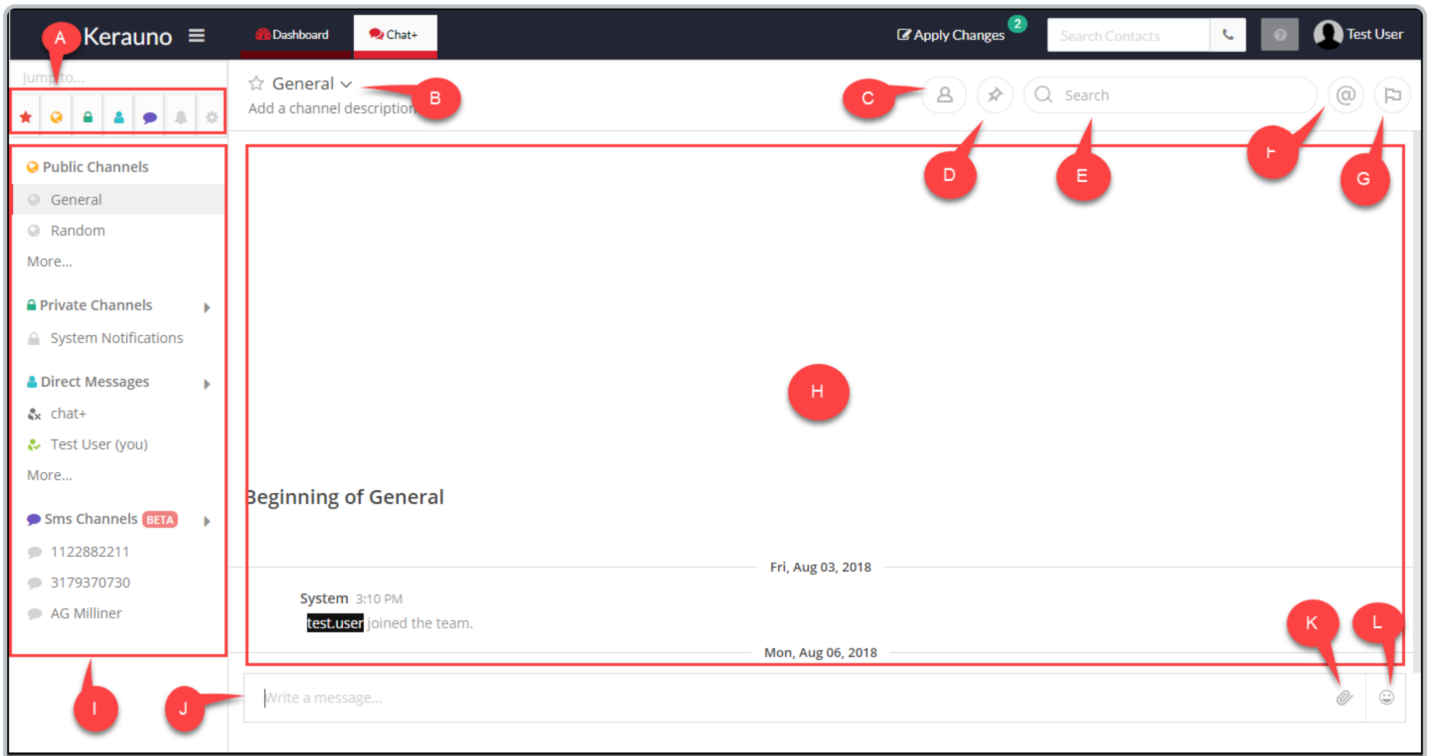


Figure 01: Chat+ Screen Initial View

A. Scroll Buttons	When channels extend off the screen you can click a scroll button to scroll to a channel.
B. Channel Shortcut Menu	Click the down arrow to display a shortcut menu to complete tasks to view or edit channel information.
C. Members	Provides access to view member information.

D. Pinned Posts	Members of a channel can pin important or useful messages in the channel; pinned messages are visible to all channel members.
E. Search	Enter text to search for specific messages, individual received from, or individual sent to.
F. Recent Mentions	Used to view a list of messages mentioning users.
G. Flagged Posts	Used to mark messages for later follow-up/response.
H. Chat Space	Previous messages from and to a specific user are displayed here.
I. Channel Sidebar	Provides access to various chat and SMS channels.
J. Message Writing Area	Space to create a new message to a selected user.
K. Attachments	Used to attach files to a message.
L. Emoji Picker	Used to select various emoticons to add to messages.

Table 01: Chat+ Screen Initial View Layout

Users do not have to be actively viewing the **Chat+** screen in order to receive new messages. If a user is viewing other modules within the Kerauno application (such as Kerauno Presence, Kerauno User Panel, Voicemail menu, etc.) all messages will appear as desktop notifications.

<table>
<tr>
<td>NOTE:</td>
<td>This will occur even if the application is minimized and the user is working in another browser tab or software. An example of a notification is shown in Figure 02 below.

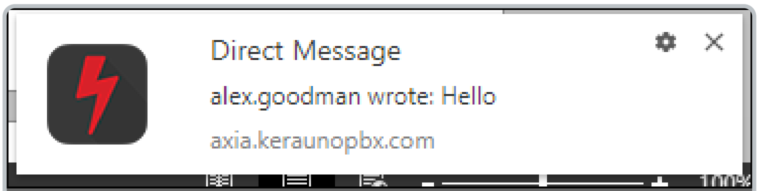


Figure 02: Chat+ Notification</td>
</tr>
</table>

Chat+ Mobile Download and Install

Last Modified on 11/20/2019 12:51 pm EST

NOTE:	The User ID and Password for Bolt and Chat+ Mobile are local to the specific instance of Bolt/Chat+ on the specific mobile device. They are not the same as Kerauno (refer to the Important differences between Bolt and Kerauno article for more information).

Kerauno Chat+ Mobile Overview

Kerauno Chat+ Mobile with SMS is an application that lets users collaborate in real time with each other on their mobile devices. This is a brief overview of the application and includes instructions for downloading and installing the application on a mobile device.

This mobile app:

- Keeps users in touch when traveling
- Streamlines collaboration on projects
- Reduces email clutter
- Supports file sharing
- Searchability and indexability to find the information you need quickly

Download and Install Kerauno Chat+ Mobile

GET IT ON Google Play   Download from the App Store

Once you've logged into either the **Play Store** or **App Store**, search for "Kerauno Chat+" then look for the Kerauno logo and download the Kerauno app.

Chat+ Mobile: Connect and Login

Once the app is installed, select the chat icon ( ) to open the app as illustrated in Figure 02 below.

Figure 02: Chat+ Mobile Icon

The application will open and prompt you to enter your Kerauno Chat+ URL. Enter the URL and press the **Connect** button. Refer to Figure 03 below.

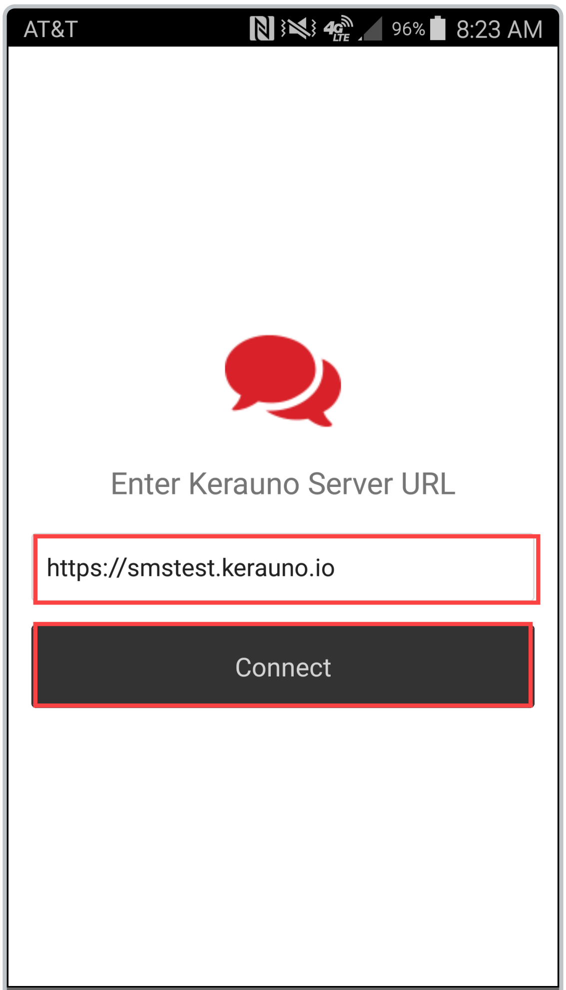


Figure 03: Enter Kerauno Chat+ URL

You are connected and a prompt to login is displayed (refer to Figure 04 below).

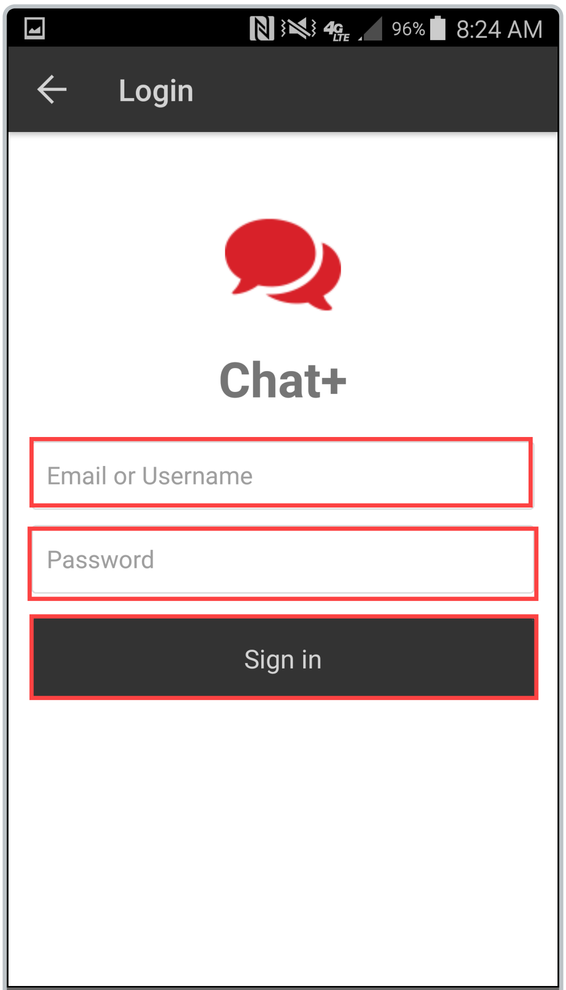


Figure 04: Chat+ Mobile Login

Enter your email or username and password. These are the same credentials you use to login to Kerauno on your desktop. Press the **Sign in** button to login to the app.

Using Chat+ Mobile

Last Modified on 11/22/2019 8:51 am EST

Kerauno Chat+ Mobile and SMS is an application that lets users collaborate in real time with each other on their mobile devices. This article explains how to use the various functions available in Chat+ Mobile.

You can perform the following tasks using Kerauno Chat+ Mobile:

- Send messages
- Share files via Chat+ Mobile
- Download shared files
- Settings
- Logout

Send Messages

To send a message press the **Recipient** button as indicated in Figure 01 below.

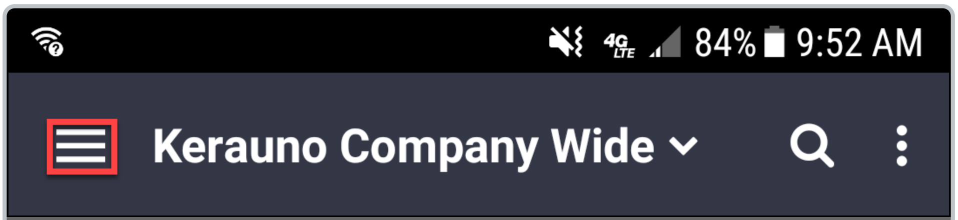


Figure 01: Recipient Button

This displays a list of unread messages, Public Channels, Private Channels, and Direct Messages (refer to Figure 02 below). Select the channel or individual(s) you want to send a message to.

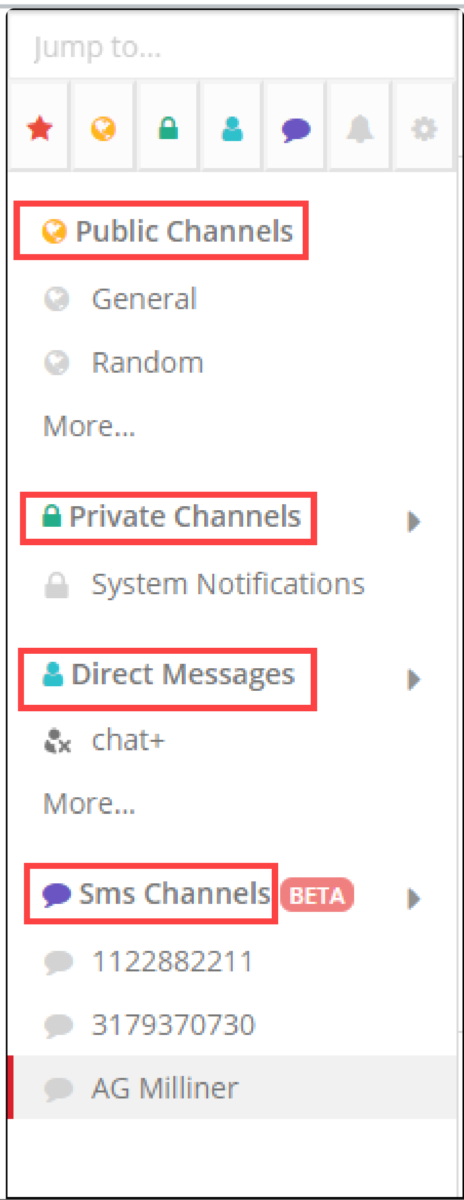


Figure 02: Channels and Direct Messaging

Select the channel or individual you want to chat with to display the chat window (refer to Figure 03 below).

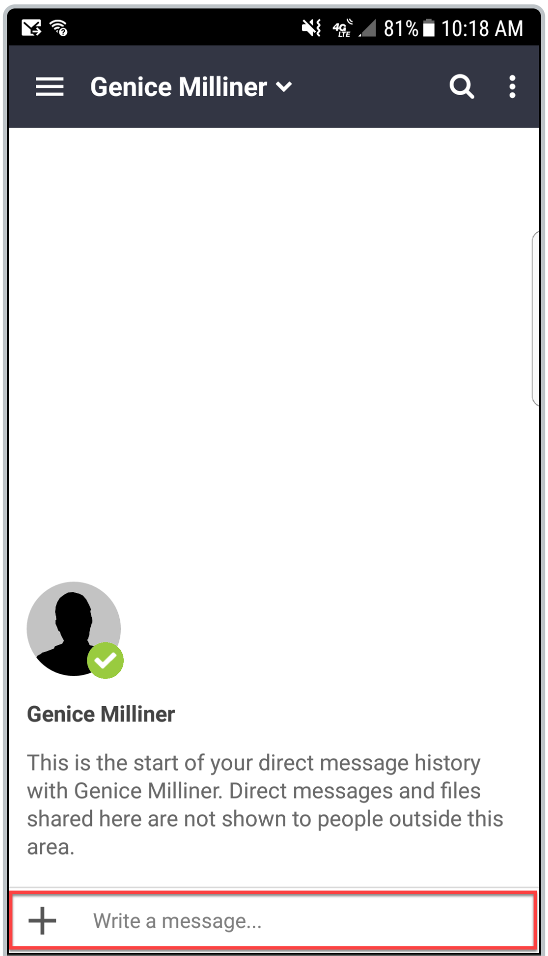
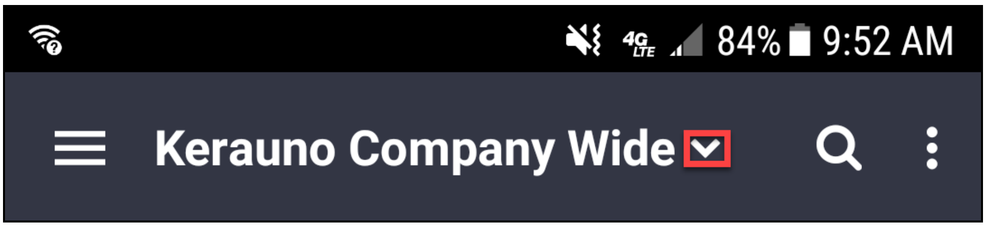


Figure 03: Write Direct Message

When you have a **Direct Message** or **Channel** window open you can also click the down arrow to the right of the name to view options for the direct message/channel (refer to Figure 04 below).



Direct Message

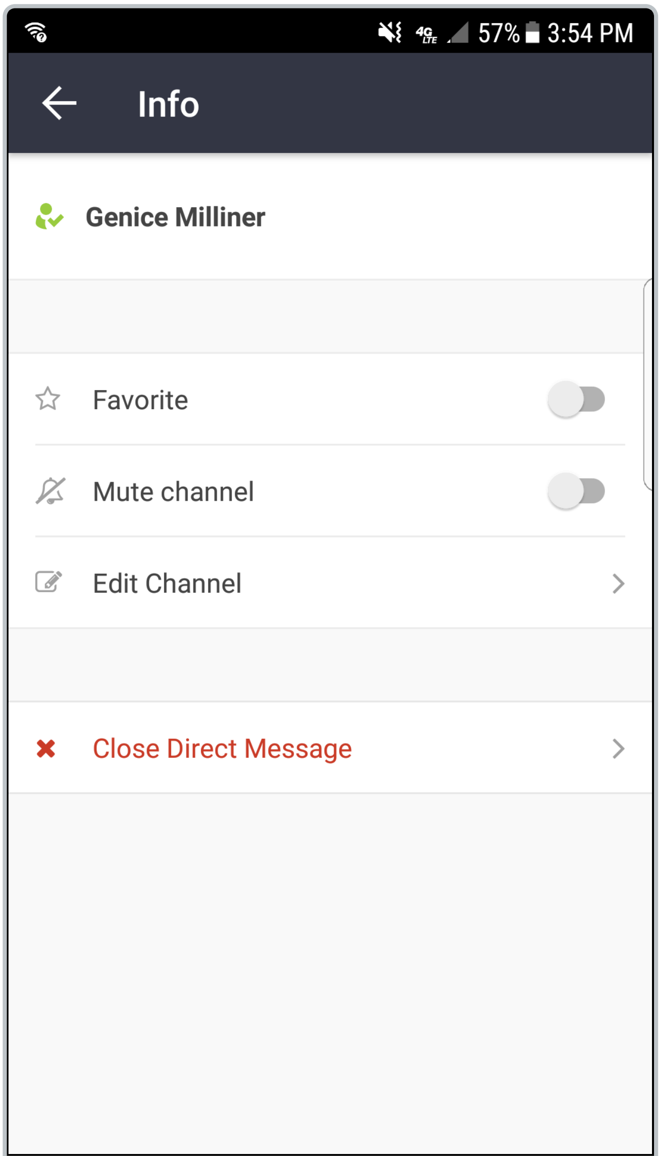
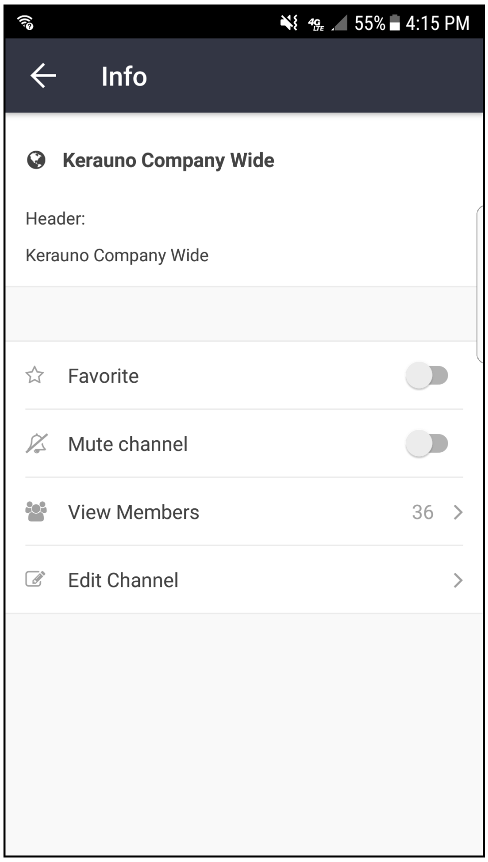


Figure 04: Option Button and Options

Channel



Share Files

To add attachments such as images or other file types, select the file as you normally would and then select **Chat+** from the **Share Via** options (refer to Figure 05 below).

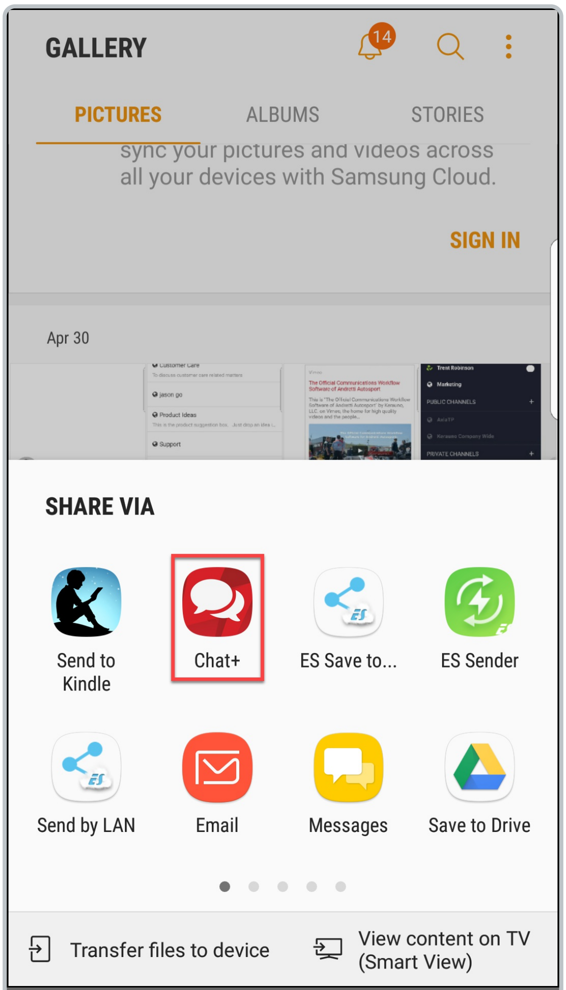


Figure 05: Sharing Files

The file is added to Chat+ as illustrated in Figure 06 below.

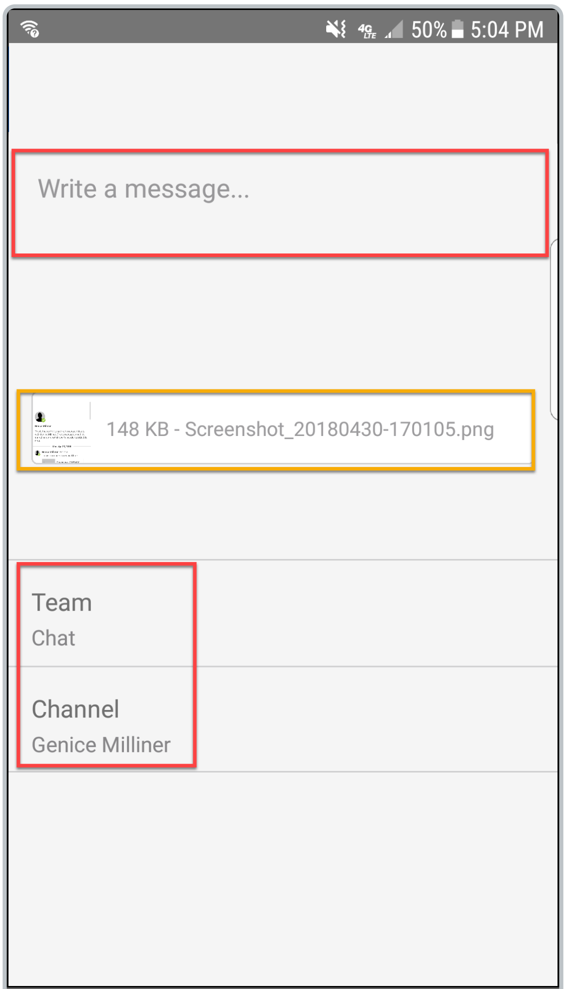


Figure 06: Attach File & Select Channel

Enter the message you want to include with the file and then select the channel you want to share the file with and send as usual.

Download Shared Files

To download files that you have received via Kerauno Chat+ Mobile, select the file you want to download. This opens a window the file can be downloaded from (refer to Figure 07 below).

Figure 07: Download Window

Press the **Options** menu on the right ( ) then press the **Download** button.

Settings

To update settings, press the **Settings** button ( ) as illustrated in Figure 08 below.

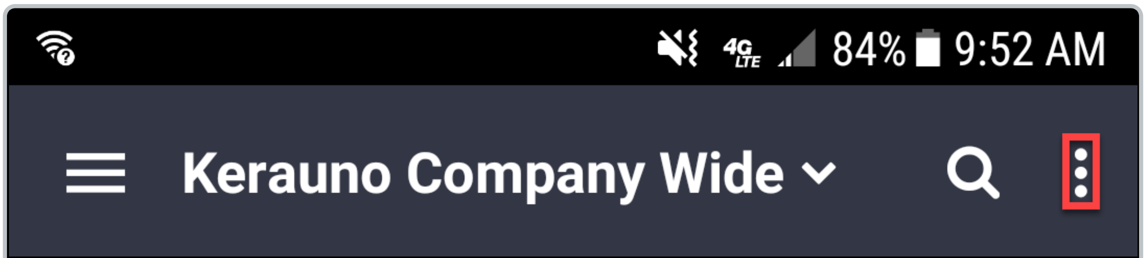


Figure 08: Select Settings Button

When the **Settings** menu is displayed (refer to Figure 09 below), select from the following:

- **Notifications**: Lets you select which Mentions and Replies you want to be notified about and the type of Mobile notifications you want to receive.

- **Display**: Lets you set your Clock to a 12-hour or 24-hour clock.
- **Advanced Settings**: Lets you Reset Cache or Delete File Cache.

Click the **X** in the upper-left corner to close the **Settings** menu.

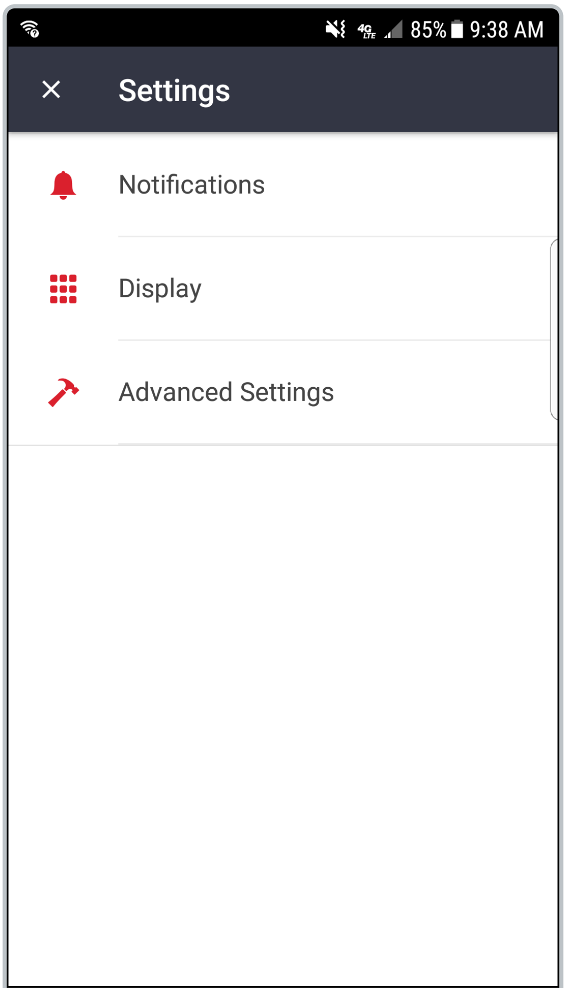


Figure 09: Settings Menu

Notifications

To set notifications, select the **Notifications** option from the **Settings** menu to display the **Notifications** menu (refer to Figure 10 below).

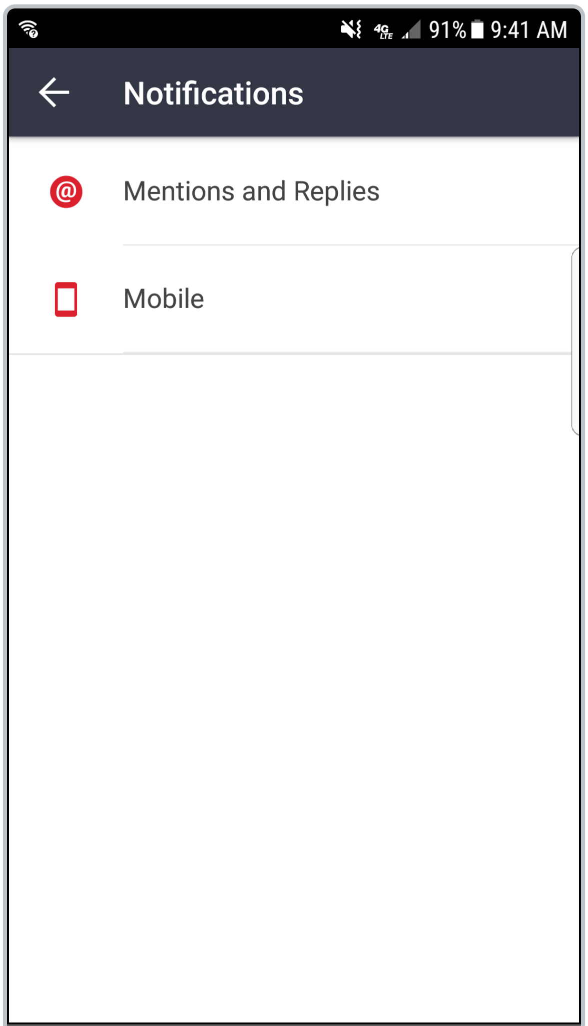


Figure 10: Notifications Main Menu

Select **Mentions and Replies** to set notifications for these message types (refer to Figure 11 below).

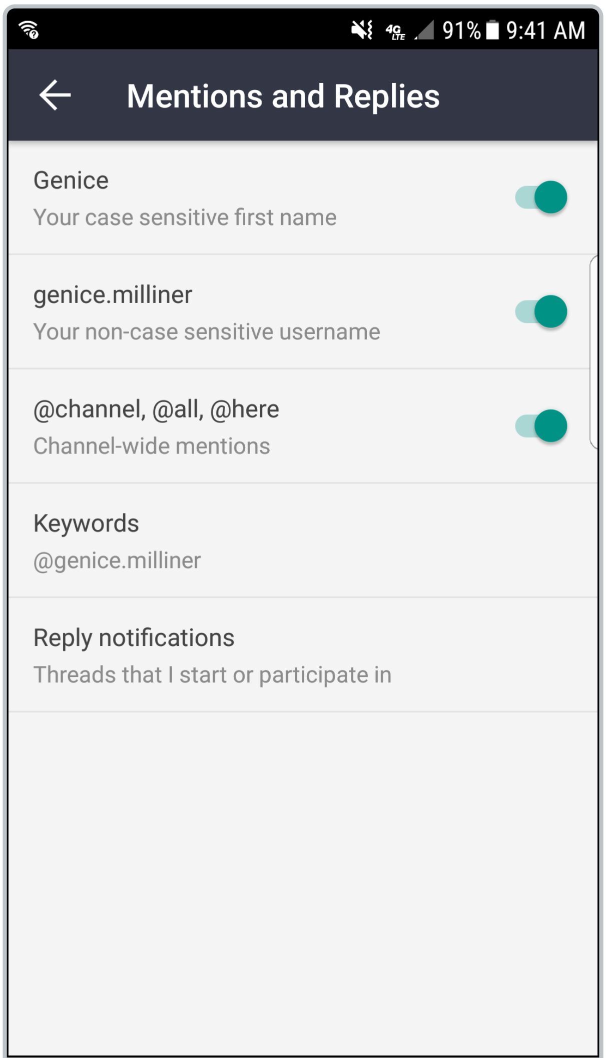


Figure 11: Mentions and Replies

Drag the sliders to the left to turn items off; drag sliders to the right to turn items on. Press **Keywords** to enter keywords you want to receive notifications on. Press **Reply notifications** to select the type of reply notifications you want (refer to Figure 12 below):

- **Threads that I start or participate in**: Notifies you when a comment is added to threads you started or are participating in.
- **Threads that I start**: Notifies you when a comment is added to a thread you started.
- **Mentions in threads**: Notifies you when you are mentioned in any thread.

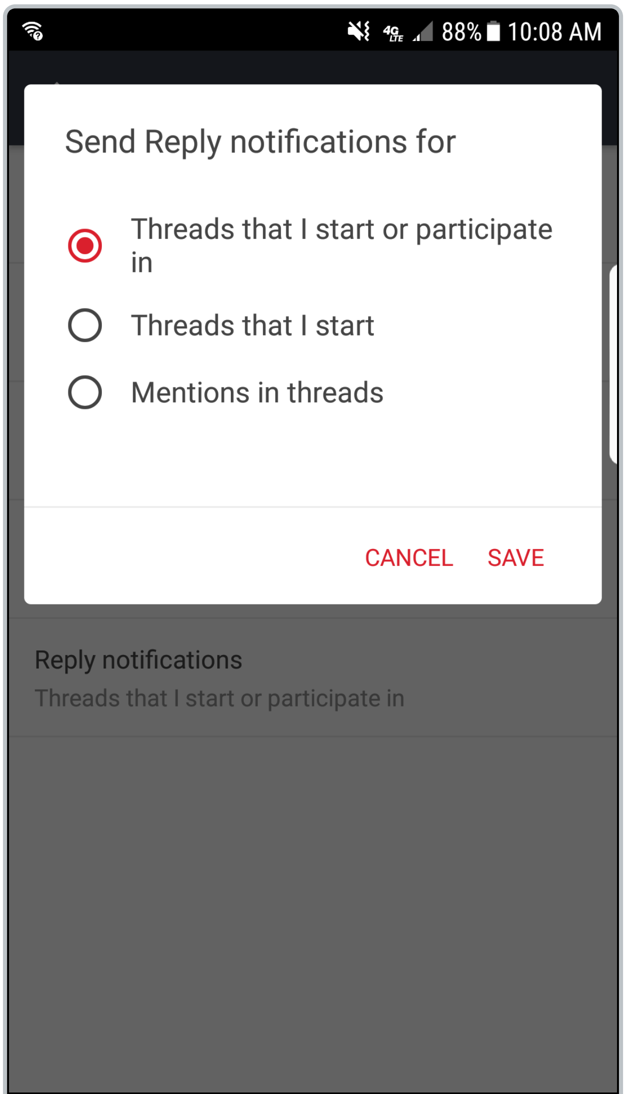


Figure 12: Send Reply Notifications

Press the **Save** button to save your changes and return to the previous screen.

Search

Select the **Search** button (magnifying glass) on the header bar (refer to Figure 13 below).

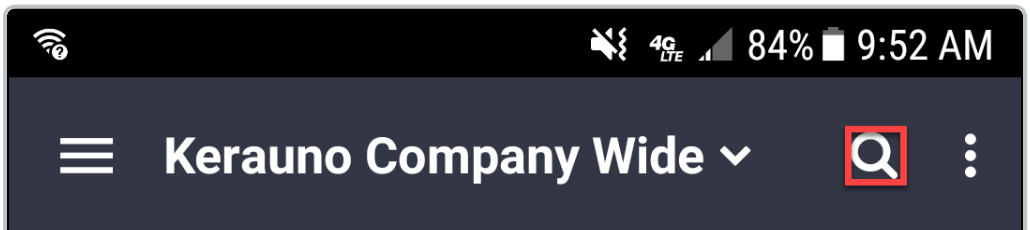


Figure 13: Search Button

This displays the **Search** menu (refer to Figure 14 below).

Figure 14: Search Menu

Press **from:username** to search via user names; press **in:channel-name** to search for a channel. When you find the user or channel you're searching for, press it.

Logout

If you simply minimize or close the Kerauno Chat+ Mobile application you remain logged in and the application runs in the background. To completely logout of the application, press the **Settings** button ( ) to display the menu (refer to Figure 15 below).

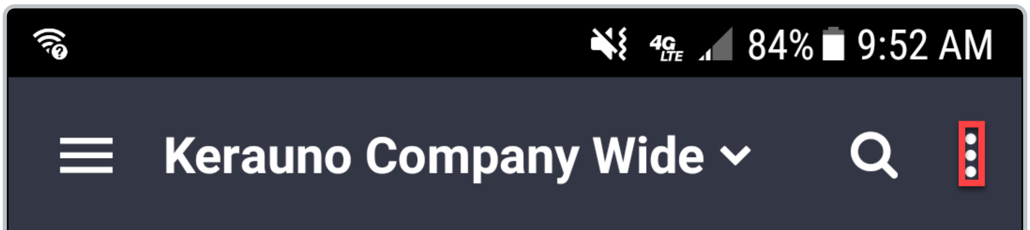


Figure 15: Settings Button

When the **Settings** menu is displayed press the **Logout** button as illustrated in Figure 16 below.

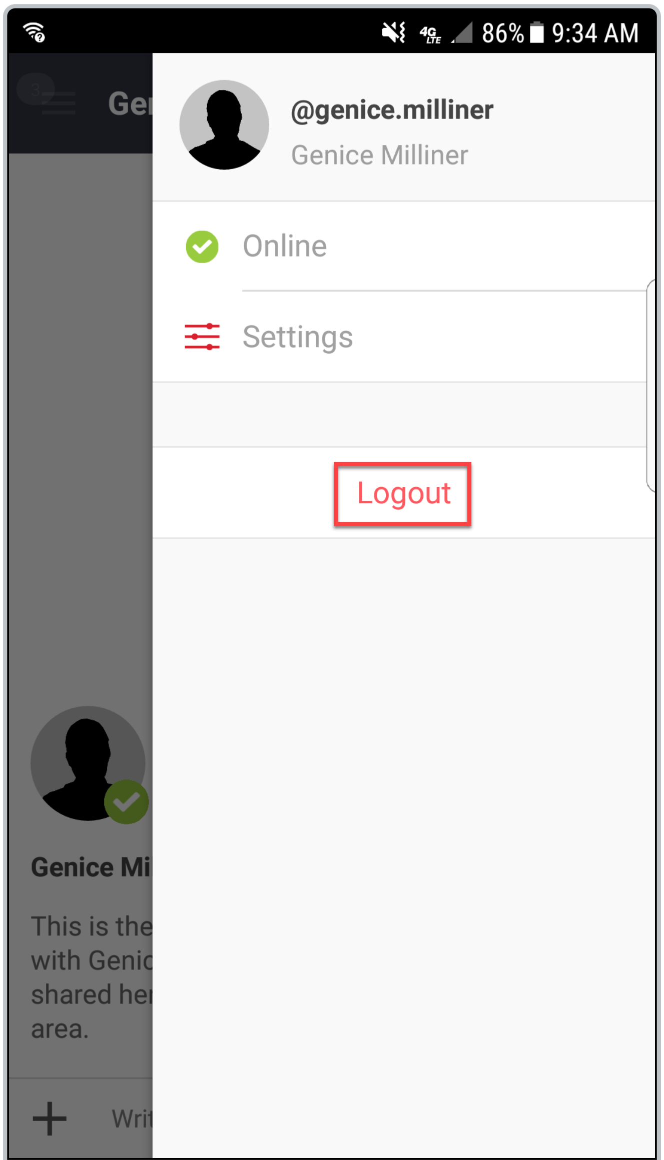


Figure 16: Settings Menu

This logs you out of Kerauno Chat+ Mobile and returns you to the **Connection** screen as illustrated in Figure 17 below.

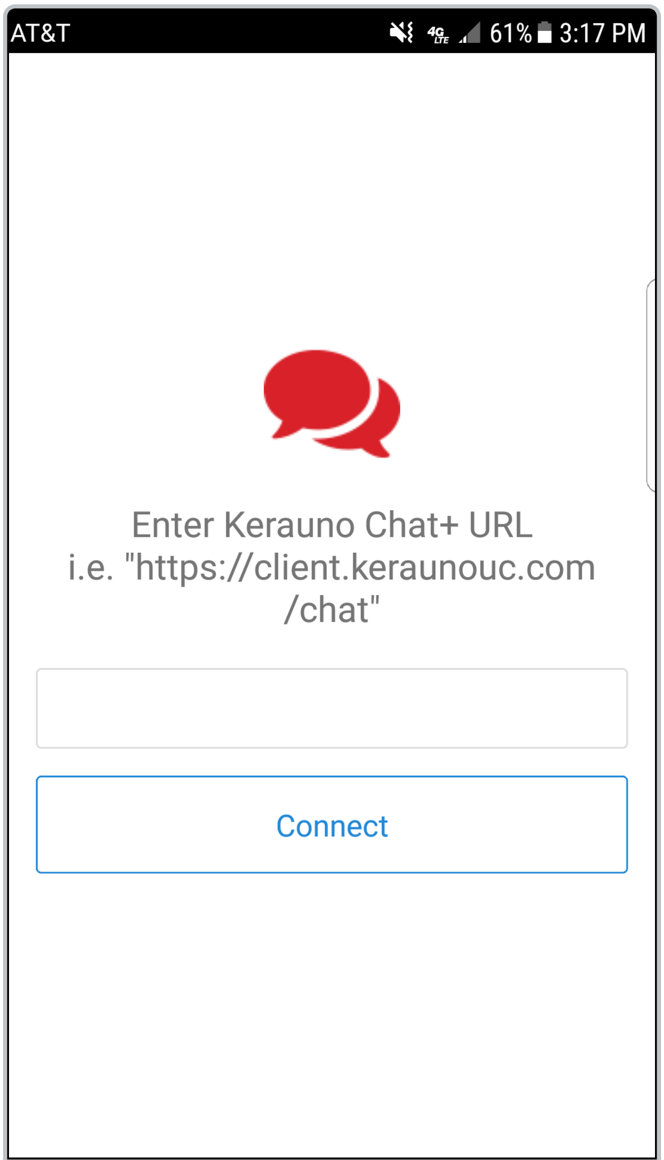


Figure 17: Connection Screen

It is now safe to close the application.

Chat+ Navigation

Last Modified on 11/22/2019 10:38 am EST

This article describes channels available in Chat+ and how to access these channels.

Chat+ Channels

Channels are used to organize conversations across many different topics, departments, or functions. They are located on the far left-hand side of the Chat+ Application. An example of the **Channels** sidebar is shown in Figure 01.

Selecting one of the options in this sidebar will take the user to view the history for that particular chat discussion. All messages for a particular channel will appear directly to the right of channel or username.

There are four types of channels: Public Channels, Private Channels, Direct Messages, and SMS Channels.

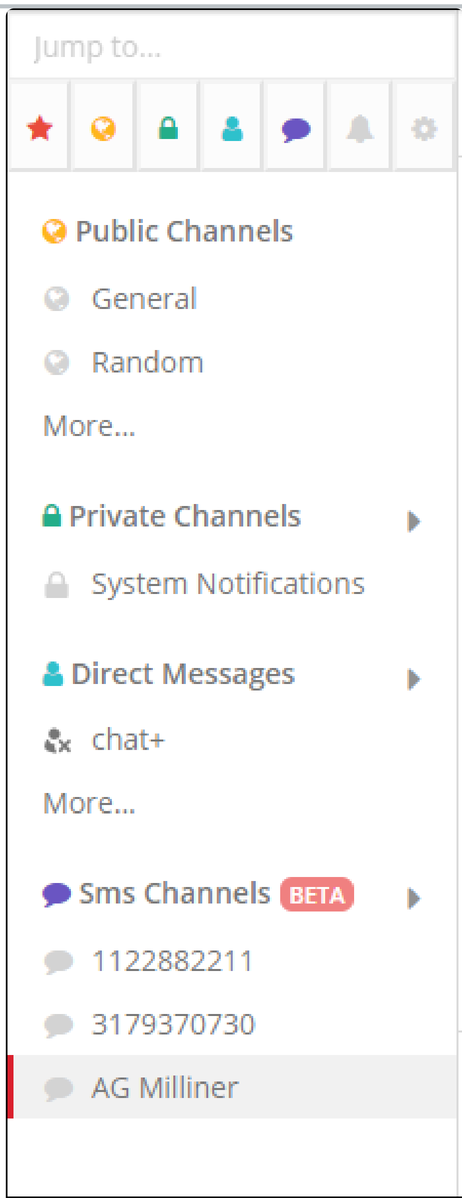


Figure 01: Chat Channels

NOTE:	Channels that are not used for seven days will be marked as "inactive" and will be removed from the channel sidebar. Data will still be retained, and you can search and re-add channels by clicking the **Plus** ( ) button, finding the appropriate channel, and posting or receiving a new chat message.

Public Channels

Public Channels are open to everyone built on the Kerauno platform.

Public Channels are identified with a yellow World ( ) icon. By default, all Kerauno users can be given the permissions to create new public channels that any user can join. If the **More...** button is selected, users can browse and join all public channels on the Kerauno server.

Private Channels

Private Channels are only visible to team members selected when the channel is created. Private Channels have a locked Padlock ( ) icon meaning that they are closed to non-invited users. Any member of a Private Channel can add additional members by clicking the Right Arrow ( ) icon or by typing **/invite** in the message bar. Channel members can choose to leave at any time by typing **/leave**.

Direct Messages (DM)

Direct Messages are for conversations between two or more people directly. No channel name is given to direct messages. No users can be added to the chat discussion. Direct messages are only visible to the users involved and are used more often for private one-to-one conversations.

SMS Channels

The SMS Channels allow Chat+ users to chat with mobile device users. The channels created here are private channels between the Chat+ user and the mobile device user. Chat+ users can add a new SMS channel by clicking the Right Arrow ( ) icon.

Channel Creation

Each user has permissions to create their own channels and direct messages by clicking on the Right Arrow ( ) icon next to any menu. They will then be given the option to add a channel name (for private or public channels) and invite the appropriate users they would like to chat with.

Zoom Integration Setup

Last Modified on 11/22/2019 11:08 am EST

Kerauno's Zoom Integration allows a user with a Zoom Pro, Zoom Business, or Zoom Enterprise account to easily initiate Video Conferences, Screen-shares, and Webinars from within the Kerauno platform. This integration directly integrates Kerauno with Zoom's set of APIs to allow a user to launch a Zoom meeting from within Kerauno in just one click.

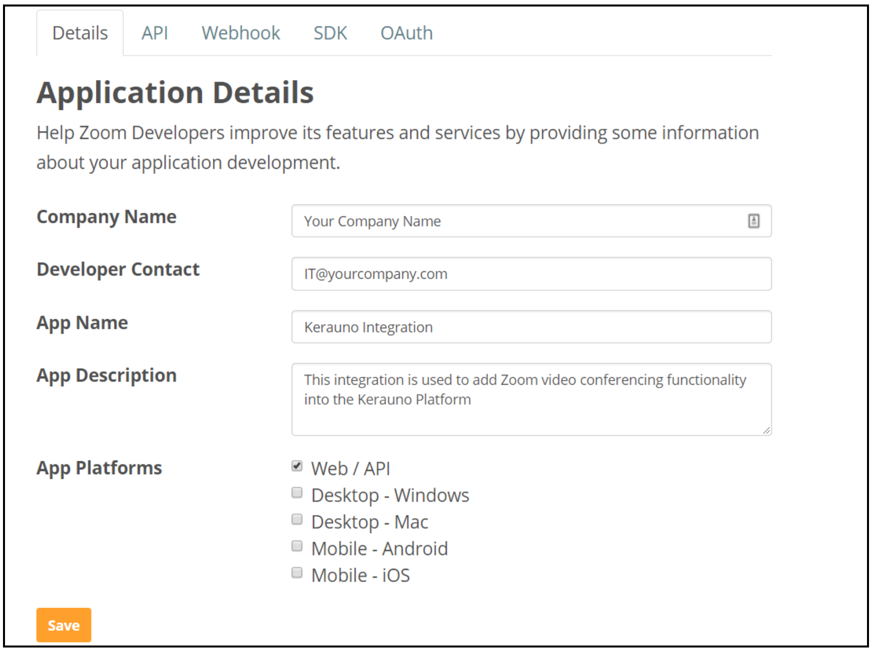
Setup Guide:

To configure Zoom Integration, you will first need:

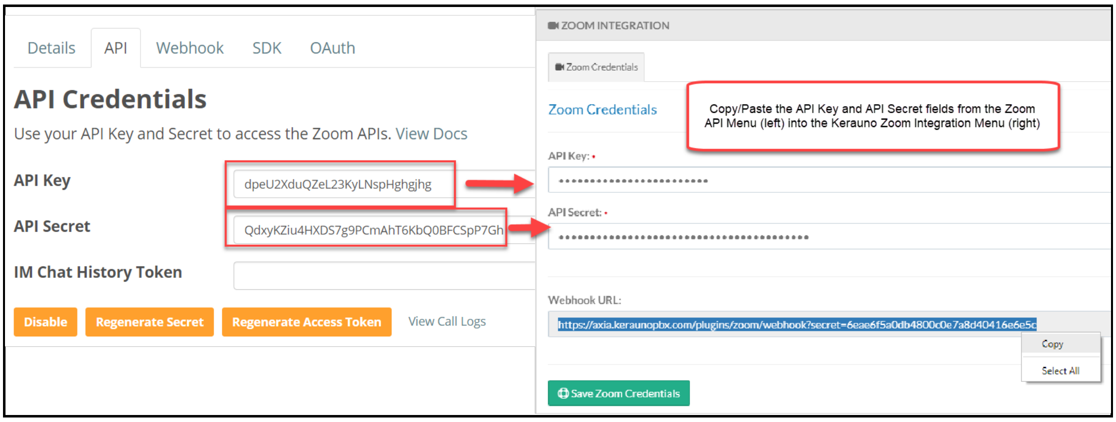
- An active Zoom Pro, Business, or Enterprise account with administrative credentials.
- A Kerauno admin account with permissions access to the Workflow Tools > Zoom Integration menu.

Steps:

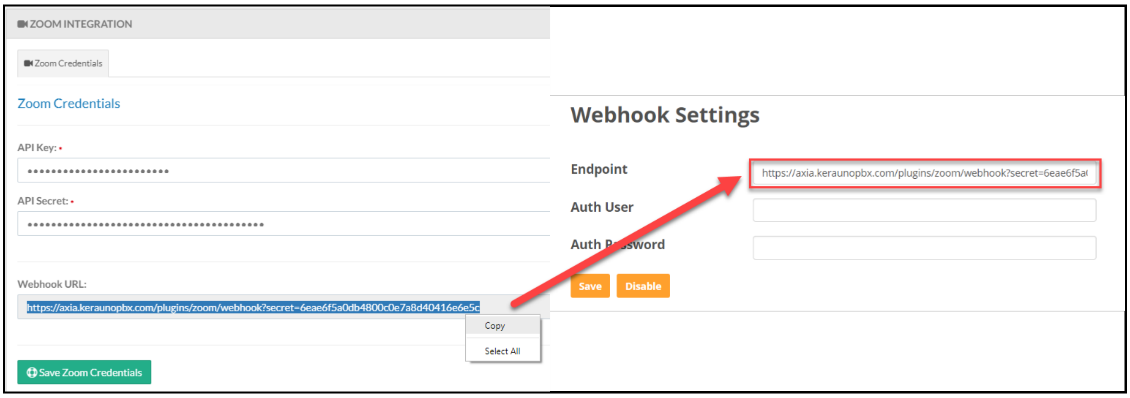
1. First, go to https://developer.zoom.us/me/ and log in using your administrative Zoom credentials.
2. On the Details tab of the Zoom Integration menu, fill out relevant details about the integration. This information is used strictly for identification purposes and will have no effect on the functionality of the integration.



3. Navigate to the API tab and click Enable (if not already enabled).
4. Select the API tab and copy the API Key that is shown. Enter this key into the Zoom Integration menu within Kerauno in the API Key field.
5. Select the API tab and copy the API Secret that is shown. Enter this secret into the Zoom Integration menu within Kerauno in the API Secret field.



6. Copy the Webhook URL from the Zoom Integration menu within Kerauno and paste it into the Endpoint field within the Zoom application under the Webhook tab. When completed, press **Save**. Note that it is currently recommended that you use v1 of the Zoom API. You can do this by clicking **Switch to Webhook v1** from the Webhook tab.


ZOOM INTEGRATION
Zoom Credentials
Zoom Credentials
API Key:
API Secret:
Webhook URL:
https://axia.keraunopbx.com/plugins/zoom/webhook?secret=6eae6f5a0db4800c0e7a8d40416e6e5c
Copy
Select All
Save Zoom Credentials
Webhook Settings
Endpoint
https://axia.keraunopbx.com/plugins/zoom/webhook?secret=6eae6f5a
Auth User
Auth Password
Save
Disable

Accessing and Managing Voicemail in Bolt for Windows

Last Modified on 08/01/2018 5:19 pm EDT

Bolt allows a user to save, delete, categorize, and listen to voicemails.

Bolt displays the number of new voicemails next to the voicemail icon as indicated in Figure 01 below.

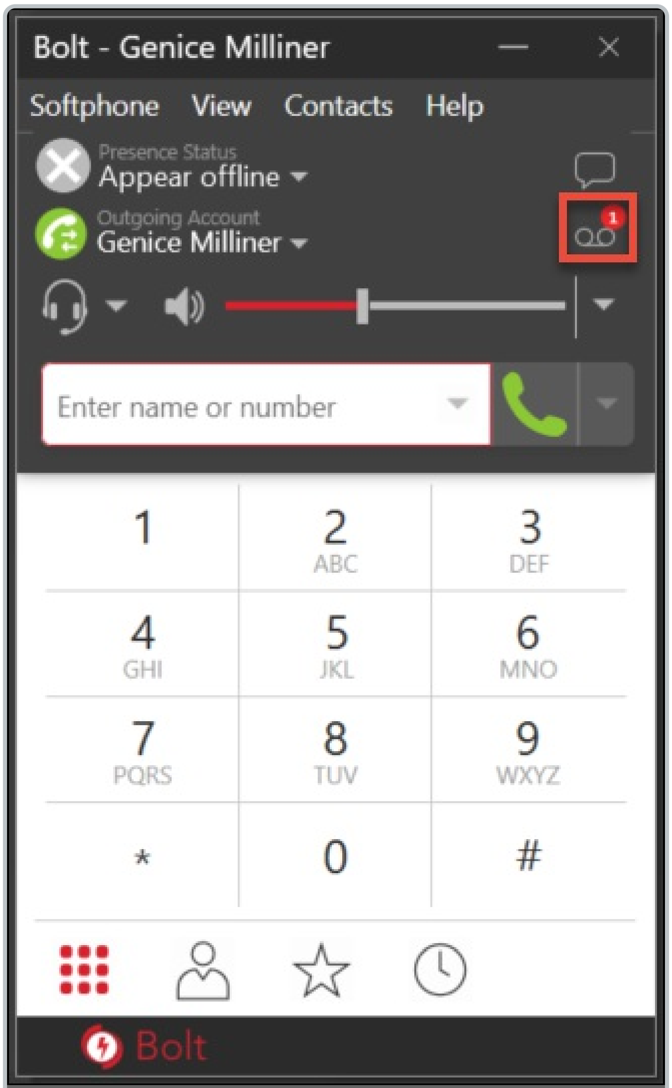


Figure 01 Voicemail Indicator

Click the voicemail icon to open your voicemail and login (as indicated in Figure 02 below). When the Password screen is displayed the system requests you enter your password.

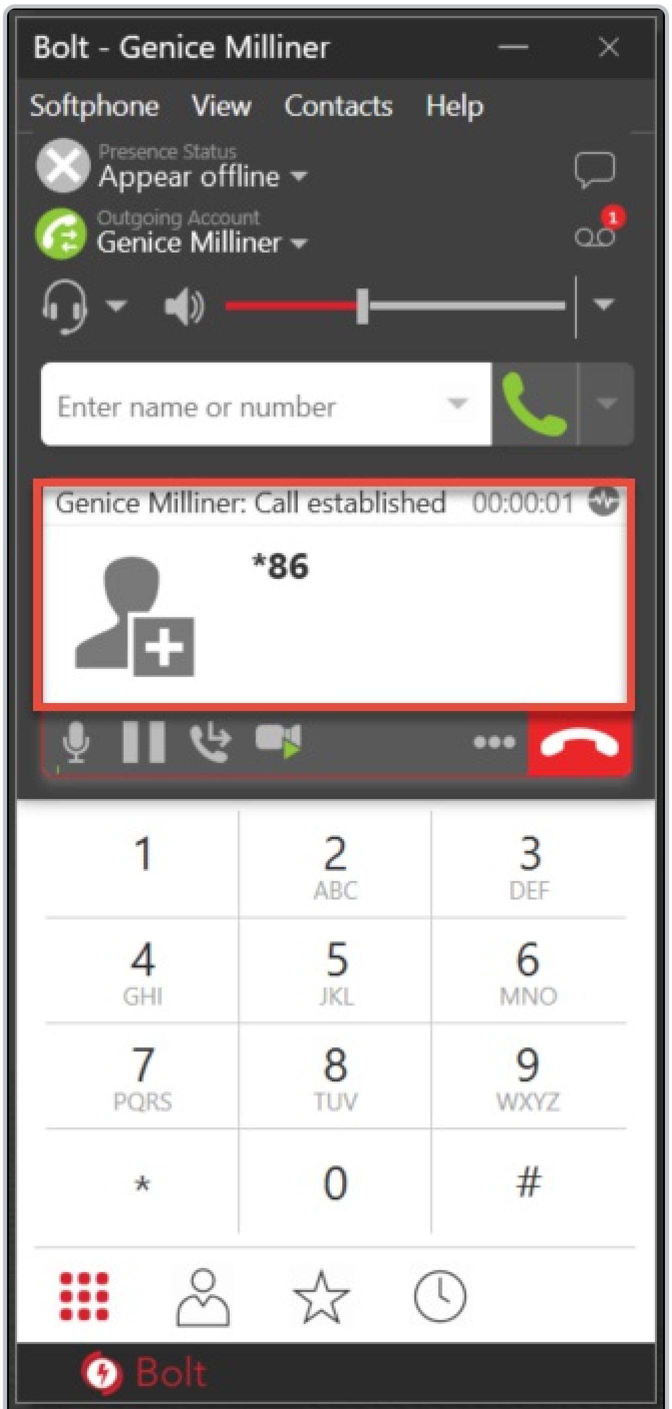


Figure 02 Enter Password Screen

Enter your PIN and wait for Bolt's response. Voicemail will walk you through listening to messages, saving messages, forwarding messages, and deleting messages.

Call History in Bolt for Windows

Last Modified on 08/01/2018 8:01 am EDT

Bolt makes it easy to see a call history so you can review what calls you've made, received, and missed.

NOTE:	Bolt call history is local to that instance of Bolt. Kerauno will contain the call history for the user across all devices. Deleting a call record in Bolt will not delete the record in Kerauno.

To view your call history in Bolt select the **Call History** icon, the clock, at the bottom of the screen.

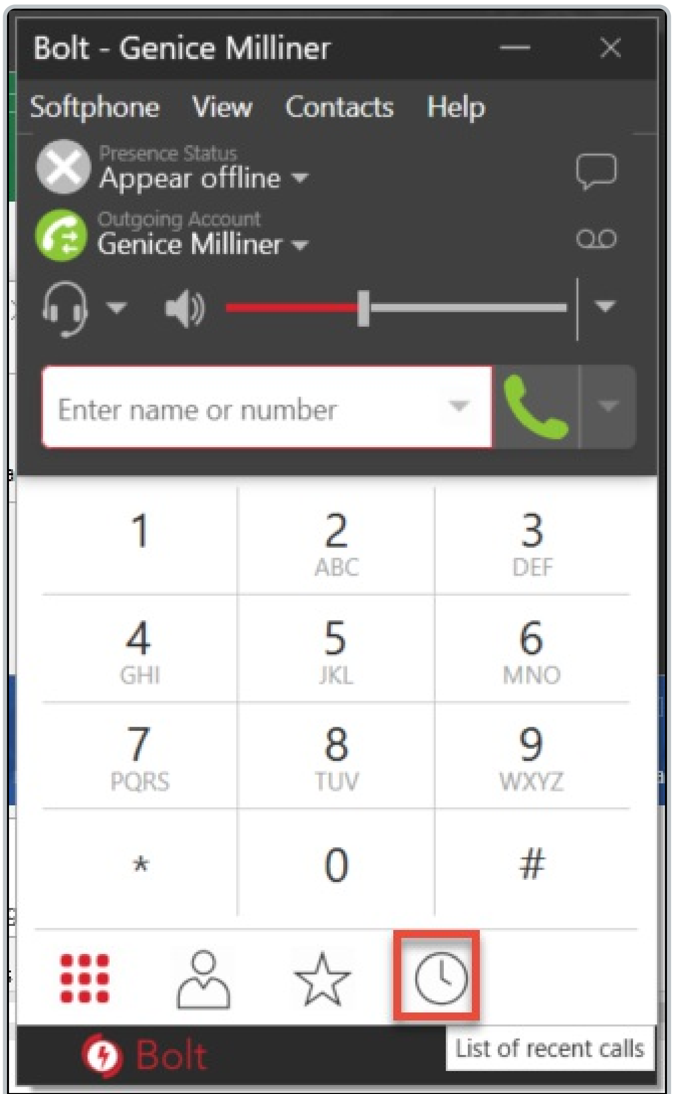


Figure 01 Call History Icon

When you select the **Call Historty** icon your **Call History** is displayed as illustrated in Figure 02 below.

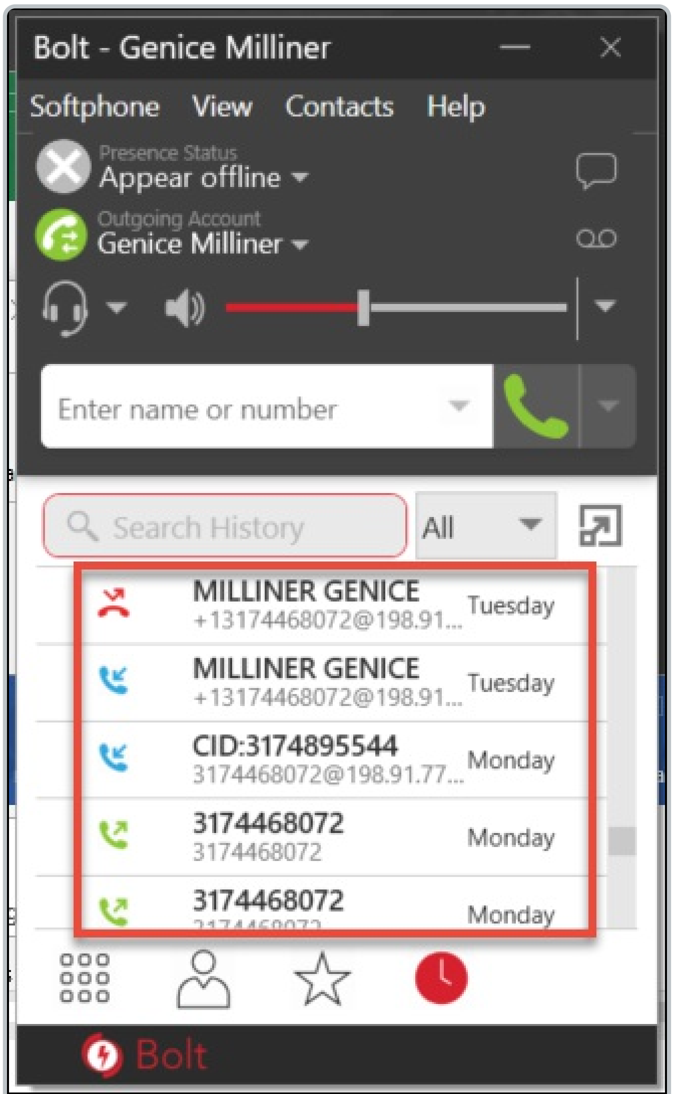


Figure 02 Call History

The calls are listed in date order from newest to oldest. **Call Indicator** icons to the left of each call indicates the type of call (incoming, outgoing, or missed). Table 01 below details what each **Call Indicator** icon means.

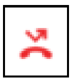
Call Indicator Icon	**Indicates**
	Indicates an outgoing call, either attempted or established.
	Indicates an incoming call that was answered.
	Indicates a missed incoming call.

Table 01 Bolt Call Indicator Icon Descriptions

The default display shows all call types. Select the down arrow to the right of the **Search** field as indicated in Figure 03 below.

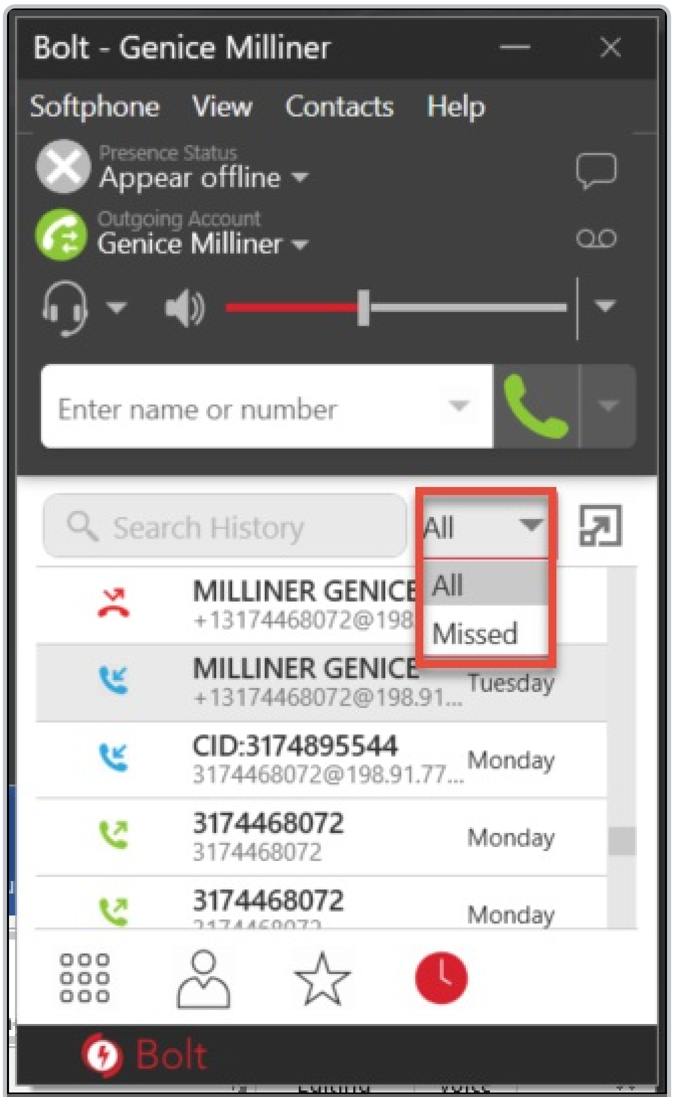


Figure 03 Call Type Selection

Select **All** (default) or **Missed** from the drop-down list. Select any call on the list to display details about the call (refer to Figure 04 below).

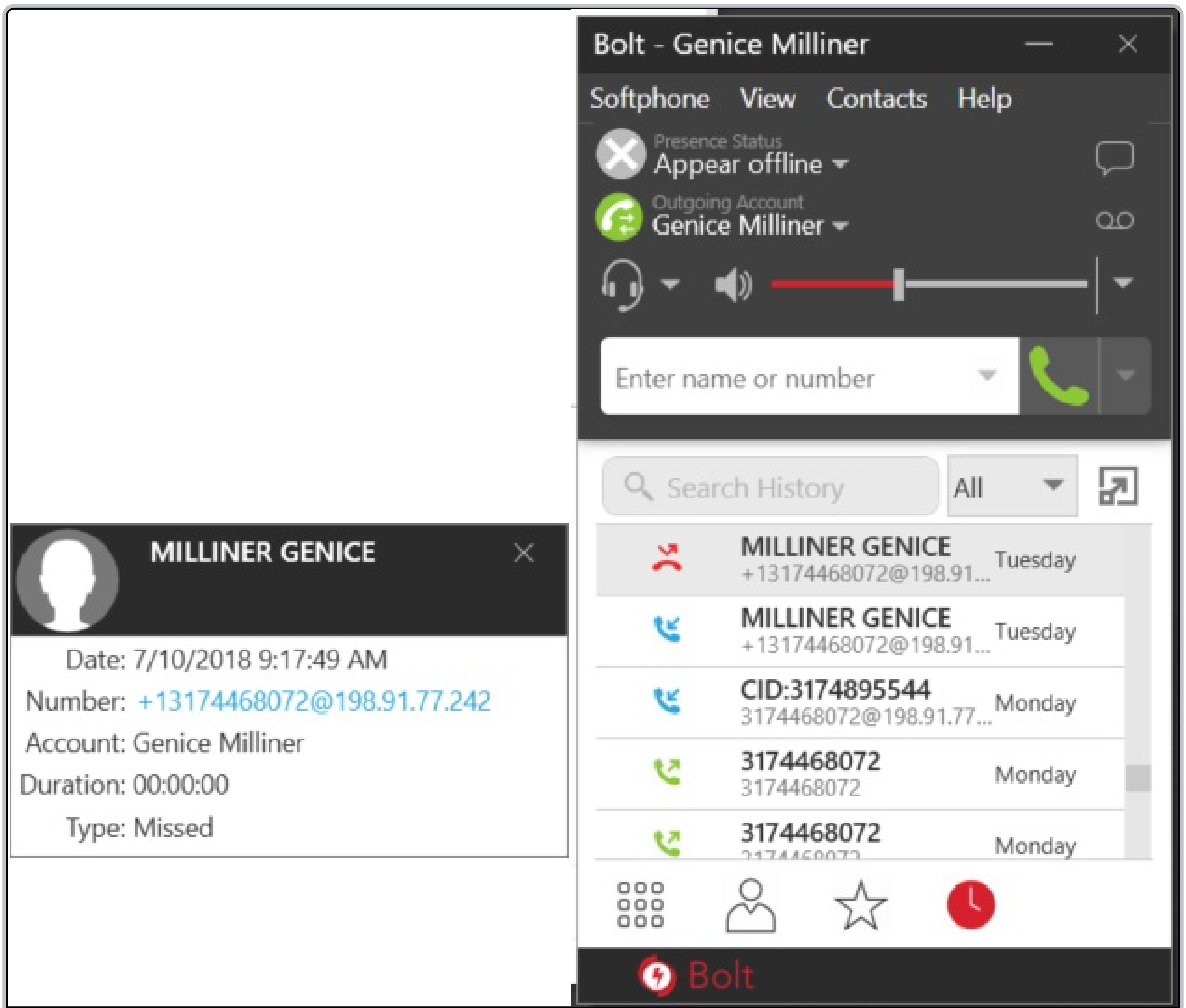


Figure 04 Call History Call Details

To remove calls from the **Call History**, right-click the call to be deleted then select Delete from the pop-up menu to delete the selected call (refer to Figure 05 below).

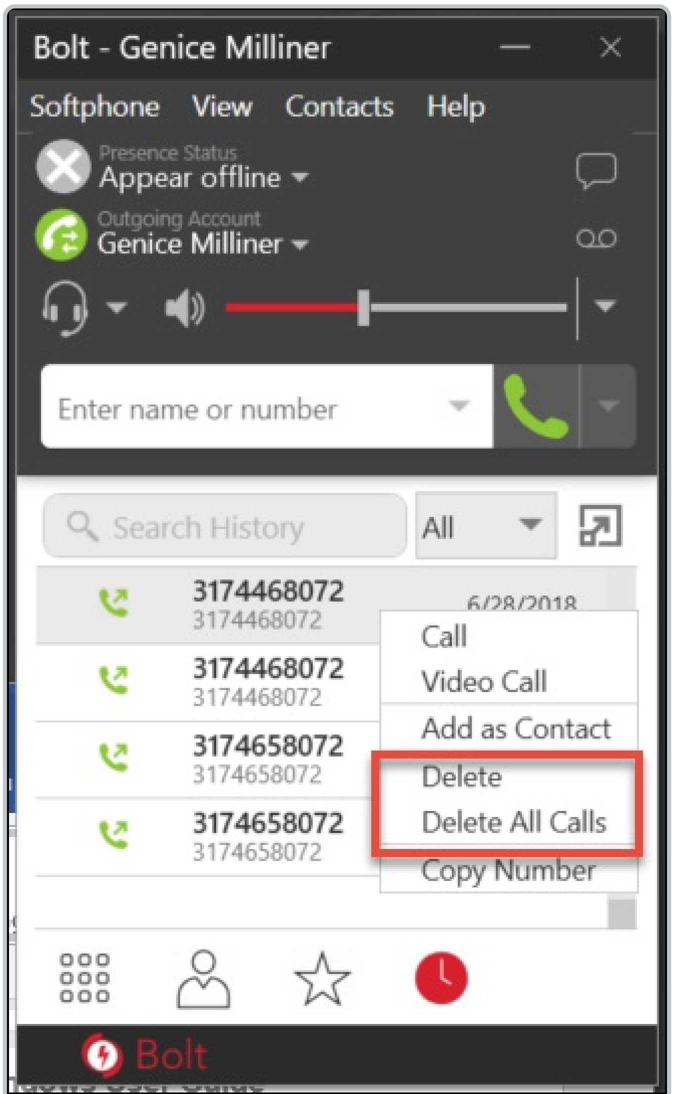


Figure 05 Delete Call(s) Options

You can also select the **Delete All Calls** option to delete all calls from the **Call History**.

Call Transfers in Bolt for Windows

Last Modified on 07/31/2018 10:40 am EDT

Calls received via Bolt can be transferred one of two ways: Unattended Transfer and Attended Transfer.

Bolt Unattended Transfer

While on a call, select the **Call Transfer Button** as illustrated in Figure 01 below.

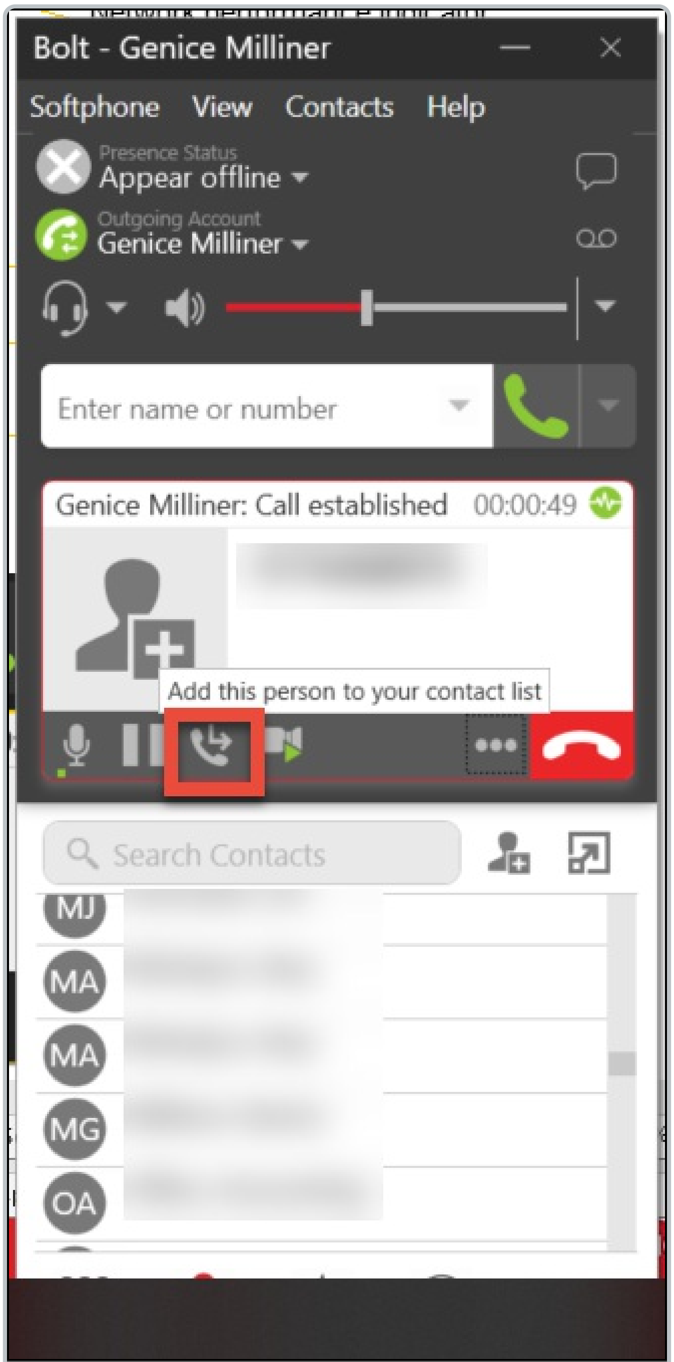


Figure 01 Call Transfer Button

This autmatically puts the call on hold and displays a **Call Entry** field. Enter a name or number into the field then press the **Transfer Now** button as illustrated in Figure 02 below.

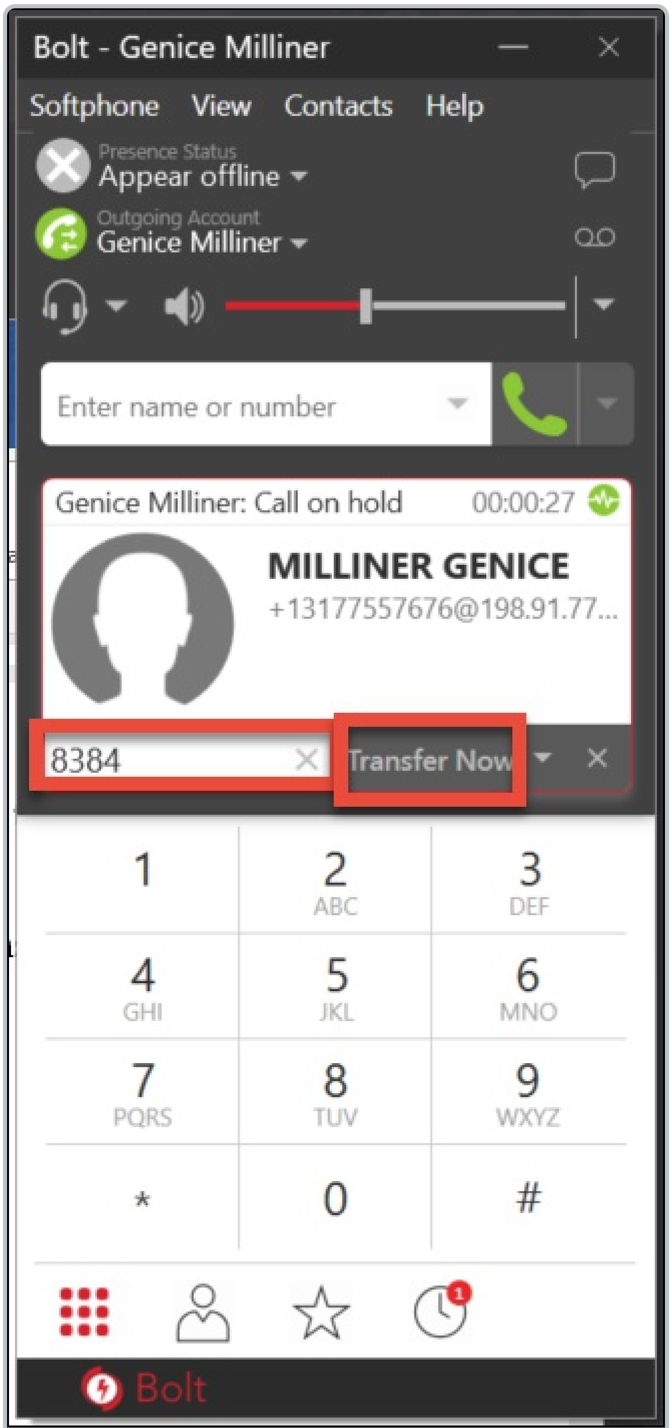


Figure 02 Bolt Transfer Call - Unattended

Bolt Attended Transfer

While on a call, select the **Call Transfer Button** which autmatically puts the call on hold and displays a **Call Entry** field. Enter a name or number into the field then press the down arrow next to the **Transfer Now** button as indicated in Figure 03 below.

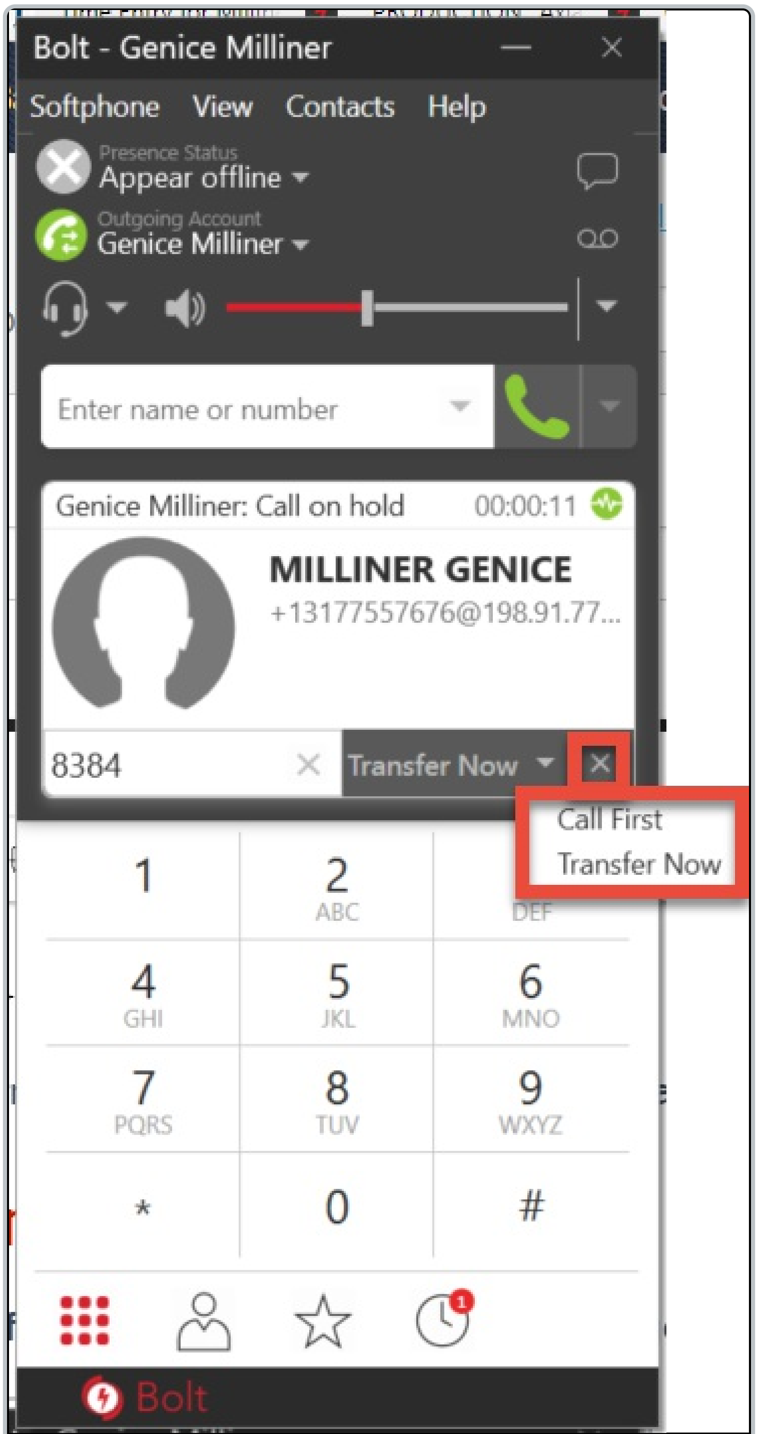


Figure 03 Bolt Transfer Call - Attended

Select **Call First** from the **Transfer** drop-down to call the person you are transferring to prior to completing the transfer. When the person you are transferring to answers, the **Transfer Now** button is enabled. After speaking to the person you're transferring to, press the **Transfer Now** button to complete the call transfer.

Conference Calls in Bolt for Windows

Last Modified on 08/01/2018 8:04 am EDT

It is easy to start, manage, and end a conference call with Bolt.

NOTE:	Bolt is a stand-alone application used in conjunction with Kerauno. Therefore, some Bolt functions are not synchronized with Kerauno. This includes Conference Calls.

Starting a Conference Call

Start a call as you normally would then, once connected, press the **...** to the left of the red phone receiver to display the **Conference Call** drop-down. Select the **Merge Calls** option (as illustrated in Figure 01 below) to begin your conference call.

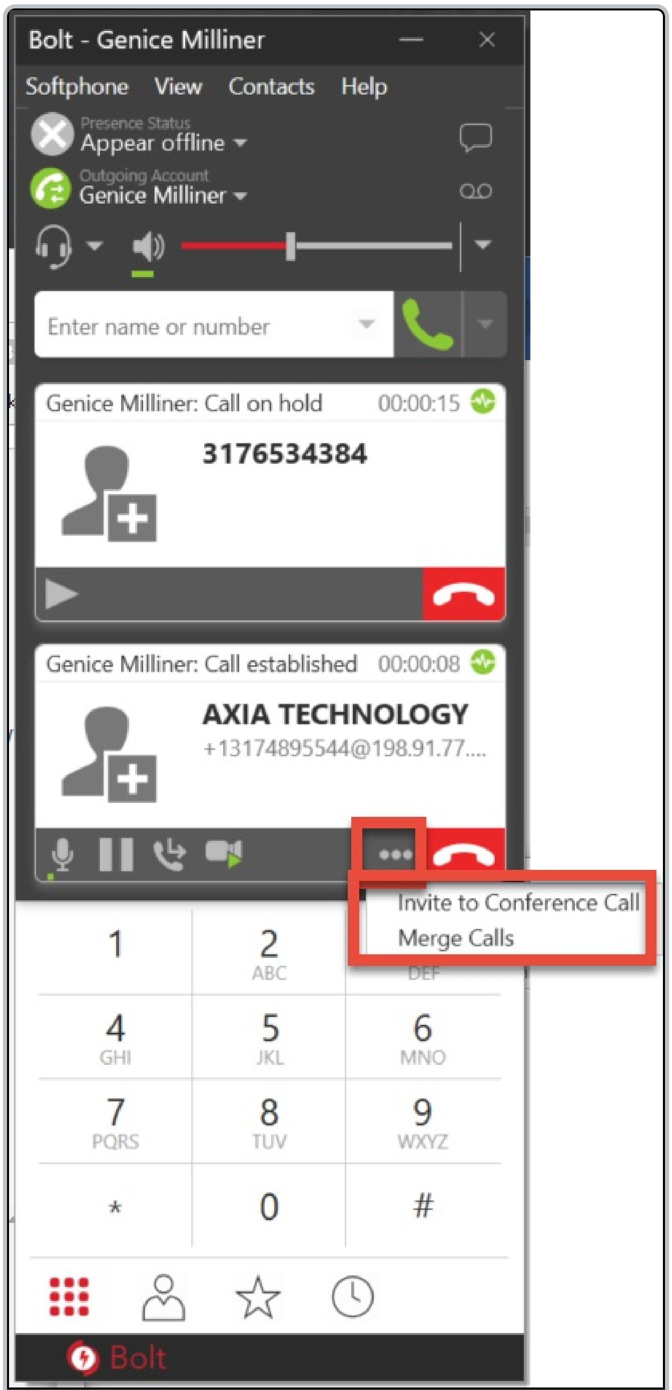


Figure 01 Begin Conferene Call

Managing a Conference Call

If you would like to add another participant to your conference call, press the **...** to the left of the red phone receiver (as illustrated in Figure 02 below) to display the **Conference Call** drop-down. Select the **Invite to Conference Call** option.

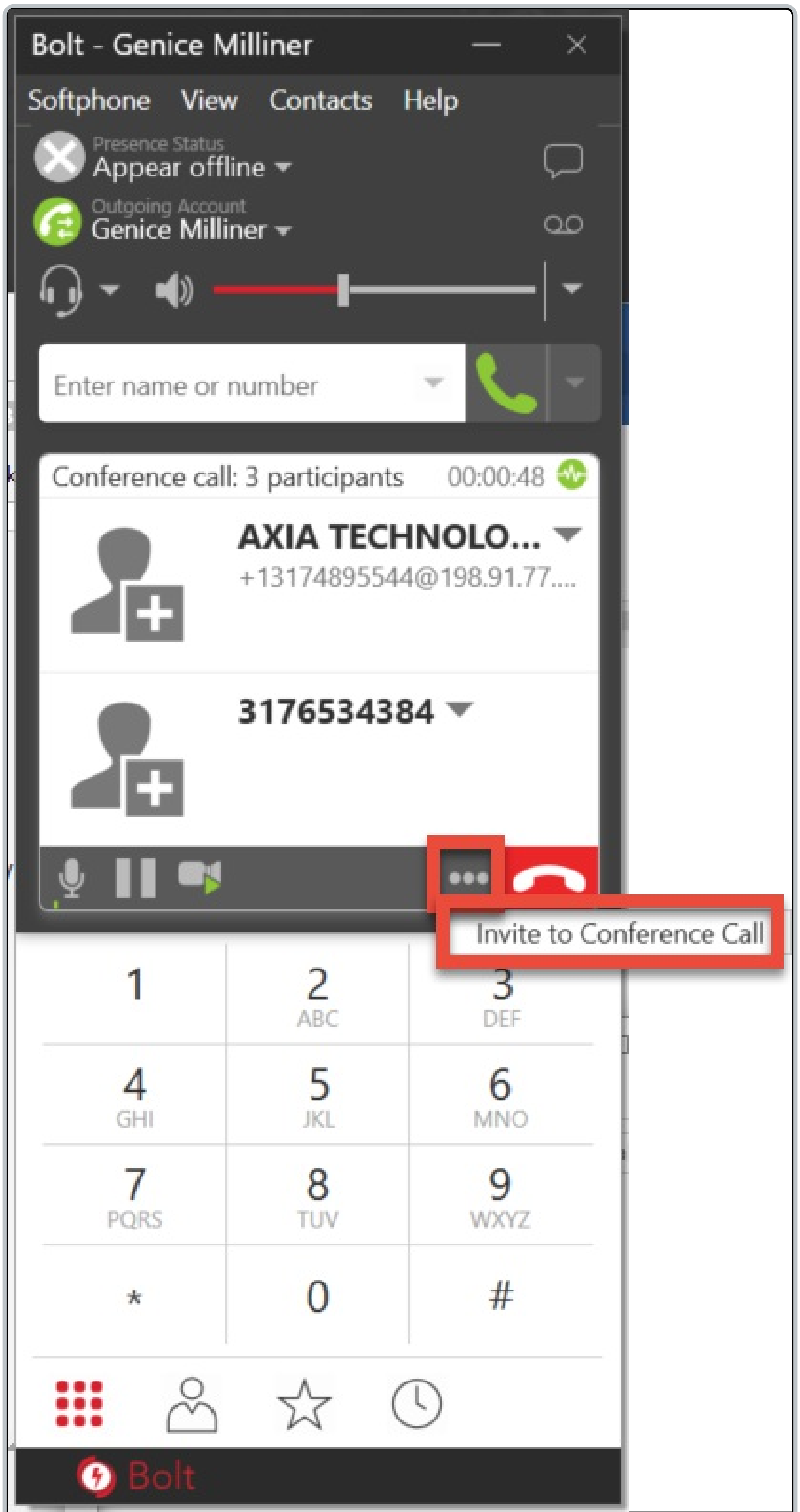


Figure 02 Invite to Conference Call

When the call is connected, select the **...** to the left of the red phone receiver to display the **Conference Call** drop-down. Select the **Merge Calls** option to add the newest participant to the call. All current participants should now be added to the call.

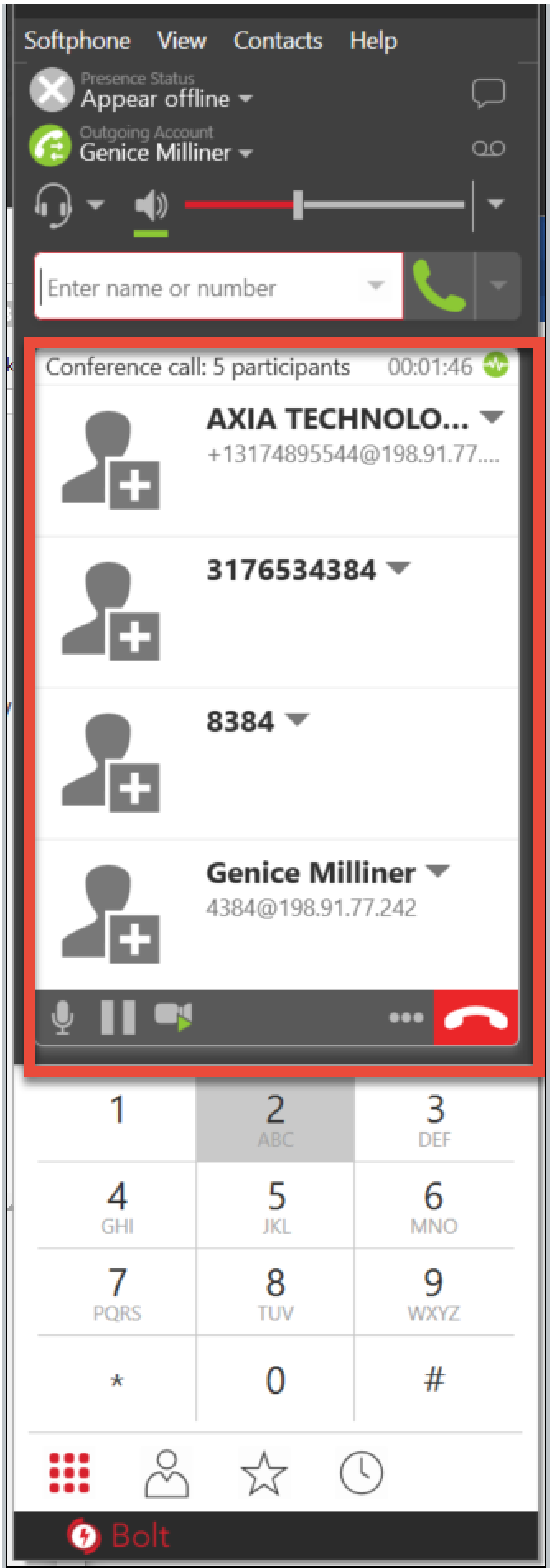
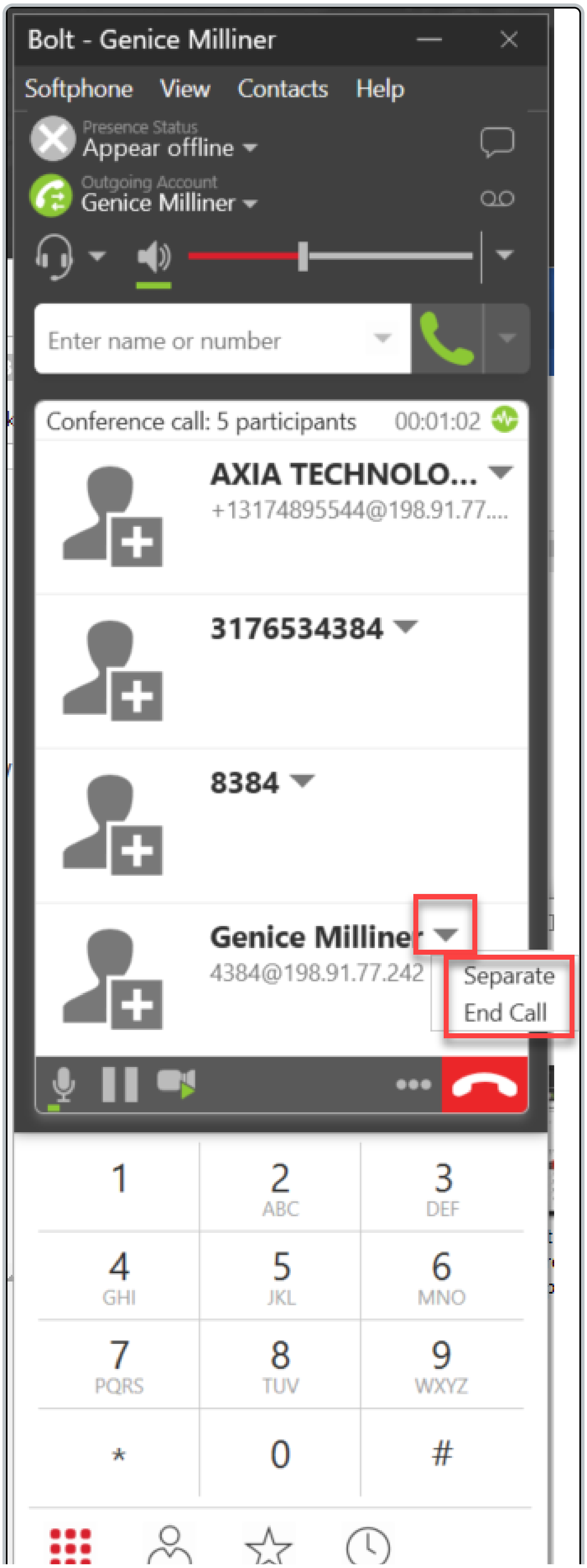


Figure 03 All Conference Call Participants Merged

Each individual participants can be handled individually.



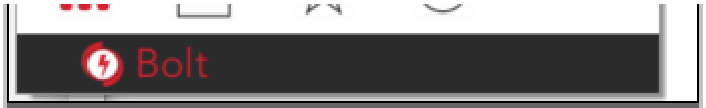
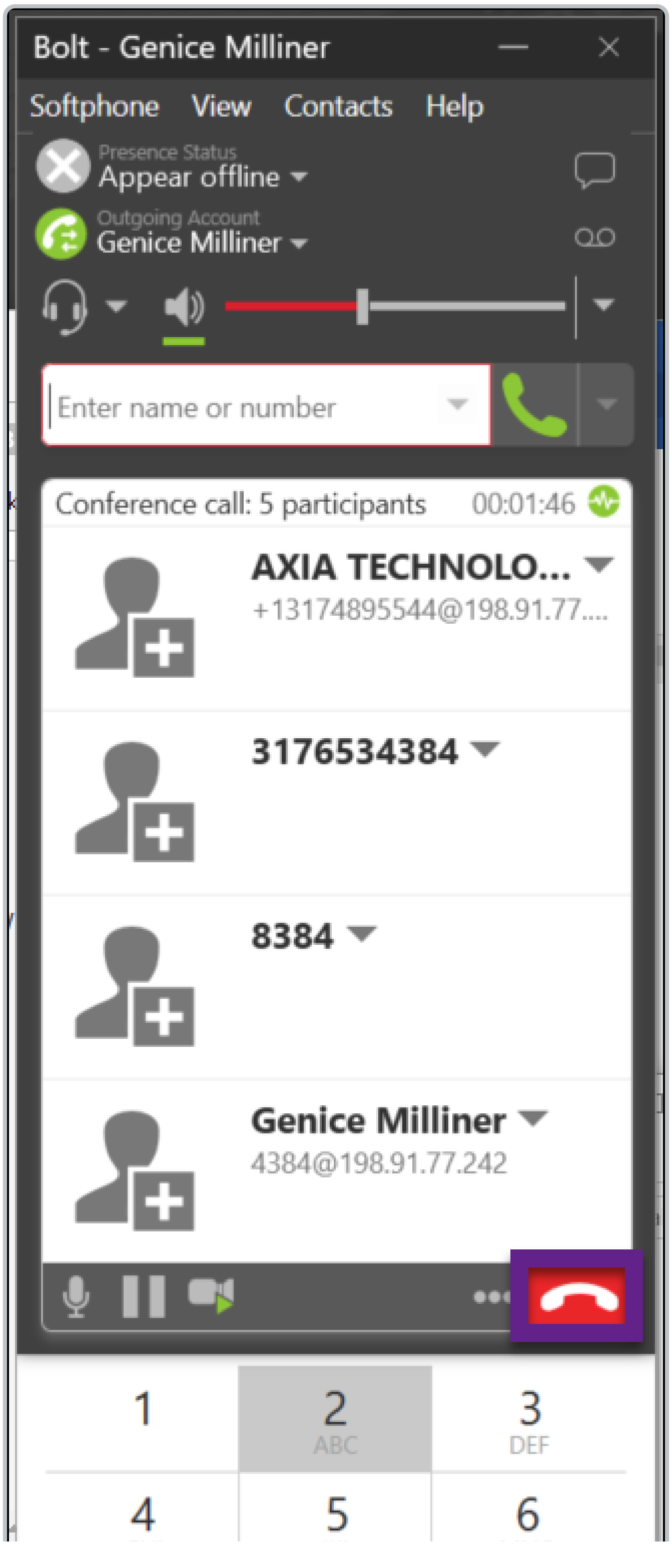


Figure 04 Individual Participant Options

Ending a Conference Call

To end a conference call for all participants, press the red phone receiver as indicated in Figure 05 below.



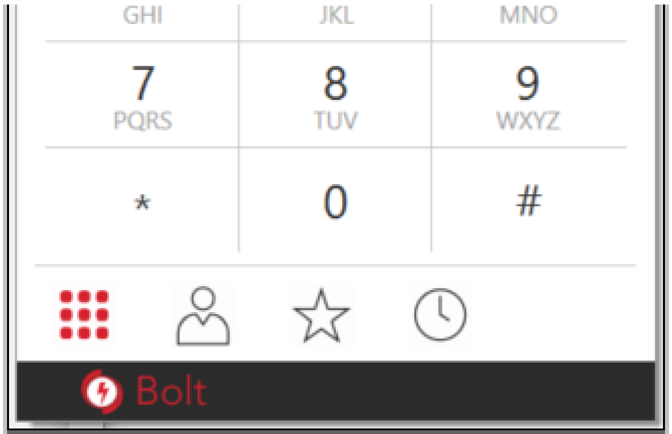


Figure 05 End Conference Call

Configuring Preferences in Bolt for Windows

Last Modified on 08/01/2018 8:05 am EDT

The **Preferences** panels let you control the way that you work with Bolt. It contains configurable features that apply globally, rather than on a per-account basis.

To access the **Preference** panels, select **Softphone > Preferences** from the main menu; this displays the **Preferences** pop-up window.

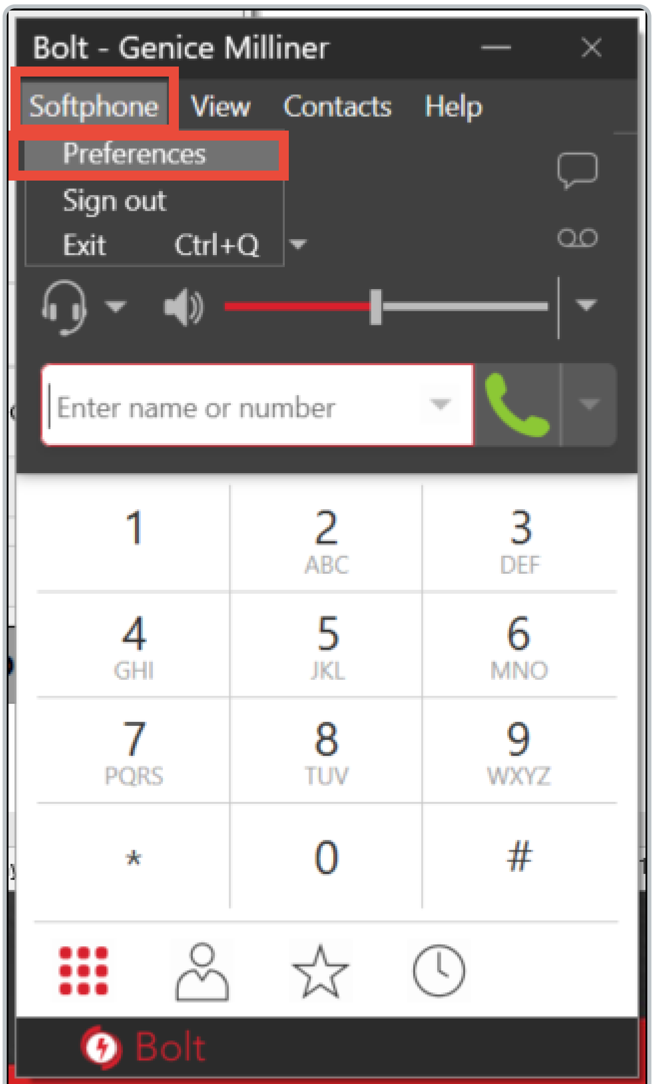


Figure 01 Bolt Preferences Menu Option

Application

The default option on the **Preferences** screen is the **Application** preferences.

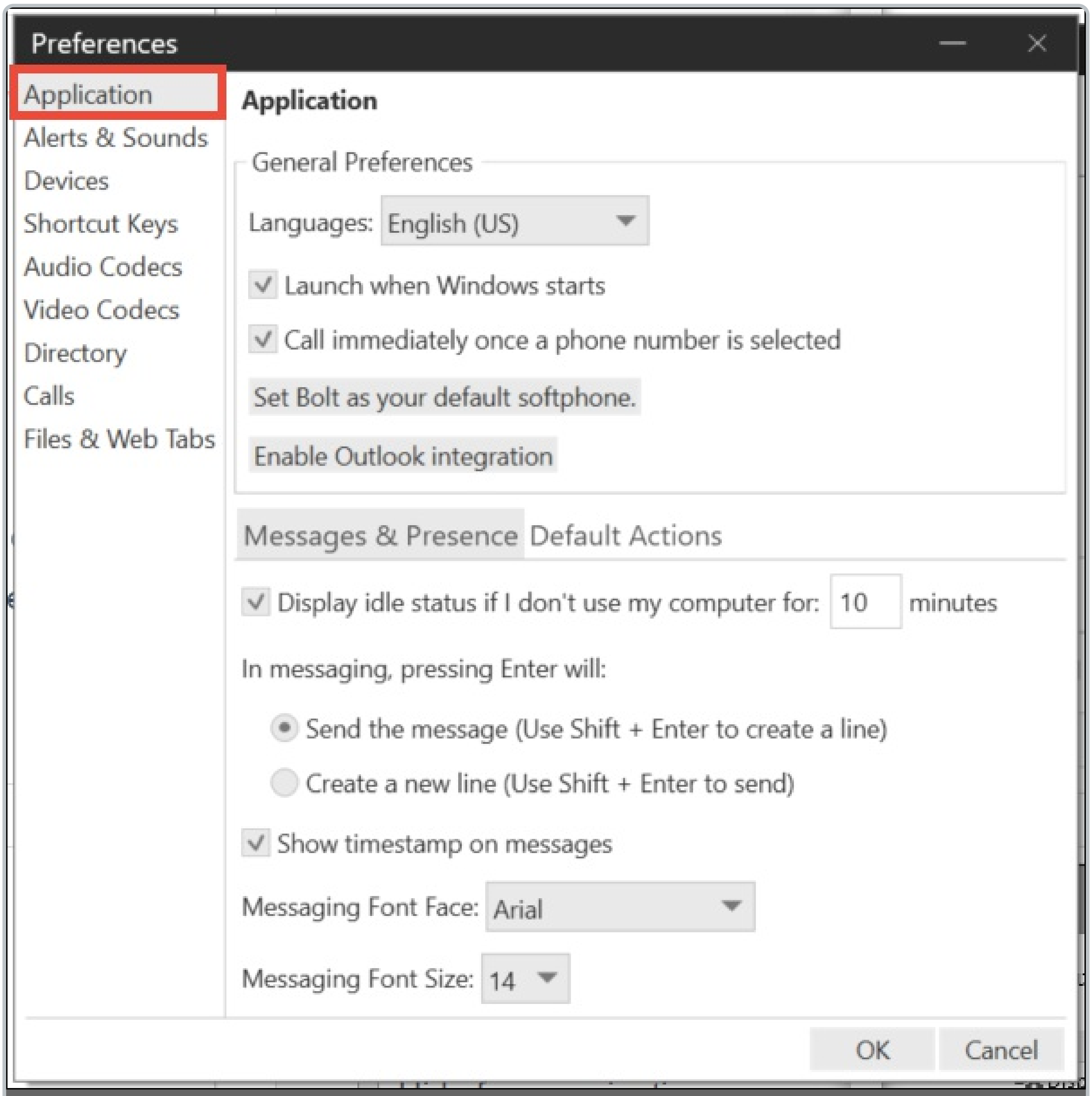


Figure 02 Application Preferences

Fields under **General Preferences** include:

- **Languages**: Select, from the drop-down list, the language you want to use as your default language.
- **Launch when Windows starts**: If this checkbox is enabled Bolt will launch when Windows starts. Select this checkbox to enable/disable it.
- **Call immediately once a phone number is selected**: If this checkbox is enabled a call is made as soon as a phone number is entered/selected. Select this checkbox to enable/disable it.
- **Set Bolt as your default softphone**: Select this option to set Bolt as your default softphone.

- **Enable Outlook integration**: Select this option to allow integration with Outlook.

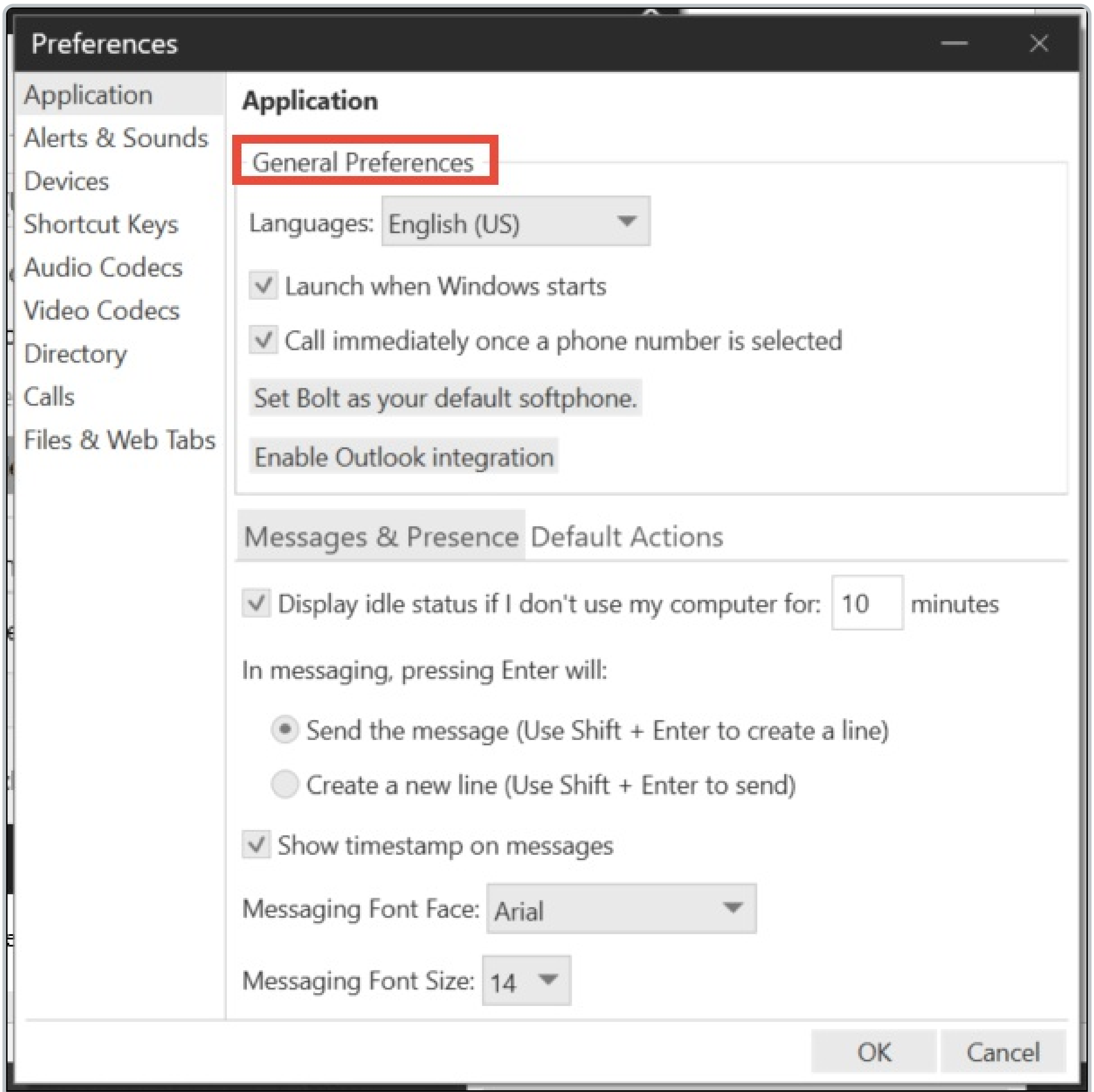


Figure 03 General Preferences

Fields under the **Messages & Presence** tab include:

- **Display idle status if I don't use my computer for ## minutes**: Enter the number of minutes (##) you want the computer to wait prior to displaying an idle status.
- **In message, pressing Enter will**:
  - **Send the message (Use Shift+Enter to create a line)**: Select this radio button to have messages sent when **Enter** is pressed. If this option is

selected you will need to use **Shft+Enter** to create a new line.
    - **Create a new line (Use Shift+Enter to send)**: Select this radio button to create a new line when **Enter** is pressed. If this option is selected you will need to use **Shift+Enter** to send your message.
- **Show timestamp on messages**: Select this checkbox to include a date/timestamp on your messages.
- **Messaging Font Face**: Select, from the drop-down, the default font face you want to use in your messages.
- **Message Font Size**: Select, from the drop-down, the default font size you want to use in your messages.

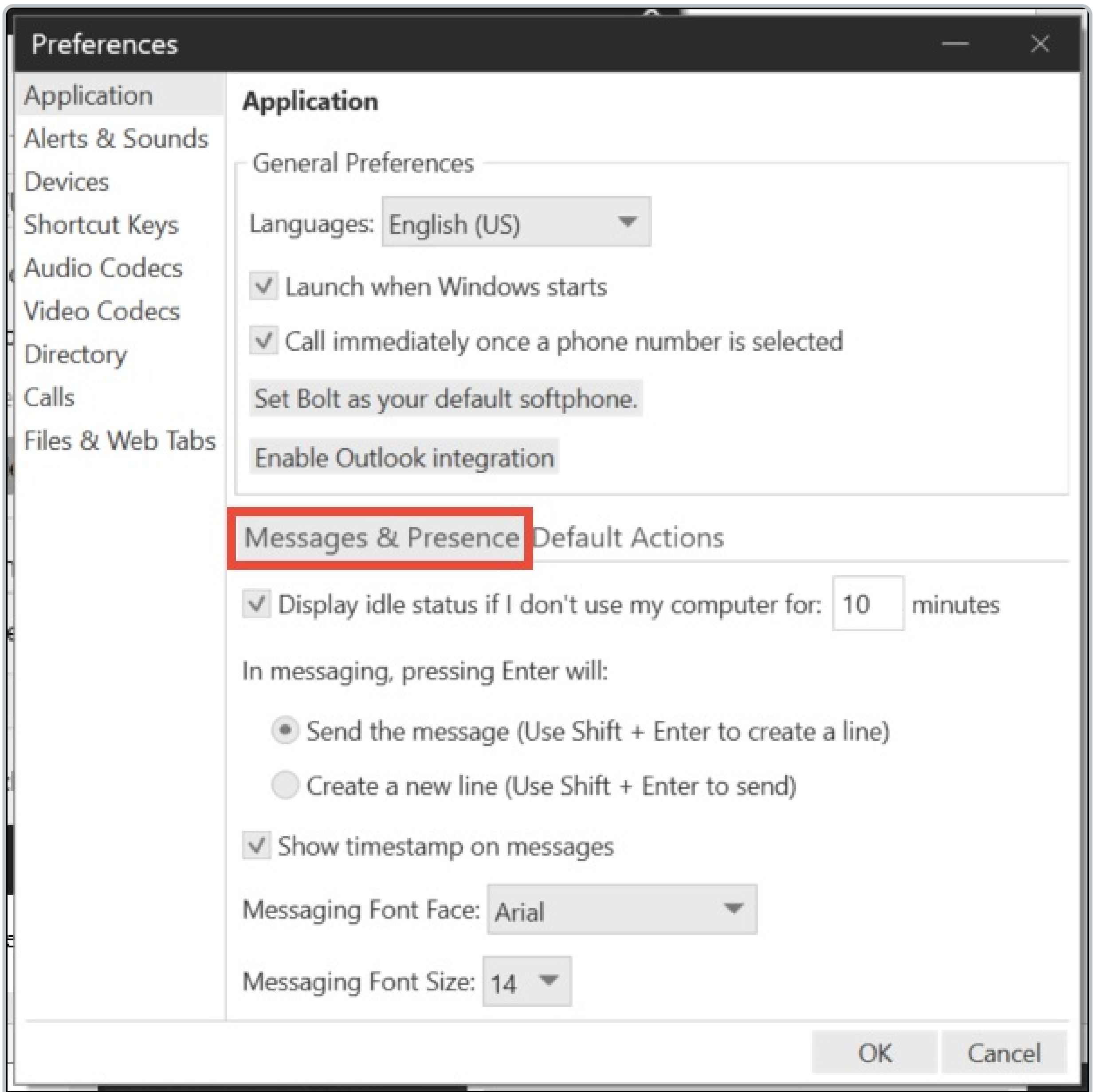


Figure 04: Messages & Presence Tab

Fields under **Default Actions** include:

- **Button**: Select, from the drop-down list, the button you want to set a default action for.
- **Default action**: Select, from the drop-down list, the default action you want the previously seleted button to perform.
- **Action when double-clicking on contact**: Select, from the drop-down list, the default action you want performed when double-clicking a contact.

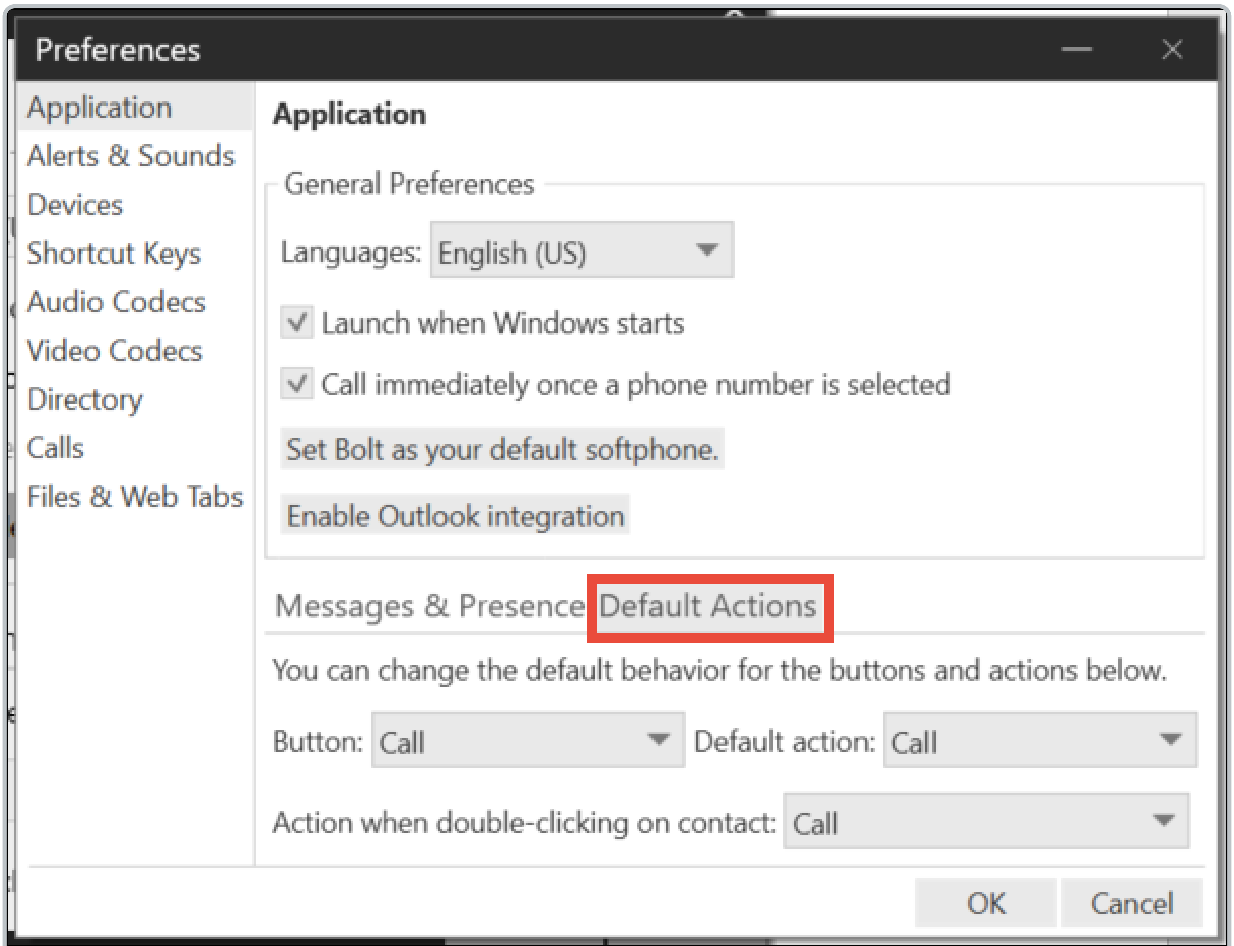


Figure 05: Default Actions Tab

Once your **Application** preferences are set select the next **Preference** on the left to set those preferences or select the **OK** button in the bottom-right of the pop-up to accept your changes.

Alerts & Sounds

Select the **Alerts & Sounds** preference to update settings for system alerts and sounds. The **Alerts** tab is displayed by default.

Fields under **Alerts** include:

- **Enable alert displays**: Select this checkbox to allow alerts to display and make selection of available alerts possible.
    - **For an incoming call**: Select this checkbox to enable an alert to be displayed when an incoming call is received.
    - **When a contact comes online**: Select this checkbox to enable an alert to be displayed when a contact is detected online.
    - **When a contact goes offline**: Select this checkbox to enable an alert to be displayed when the system detects a contact going offline.
    - **For IMs (show alert instead of automatically opening IM window)**: Select this checkbox to enable an alert to be displayed when a message is received; instead of automatically opening the IM window.
- **Use Windows notifications**: Select this checkbox to allow Bolt to use Windows notifications functionality.

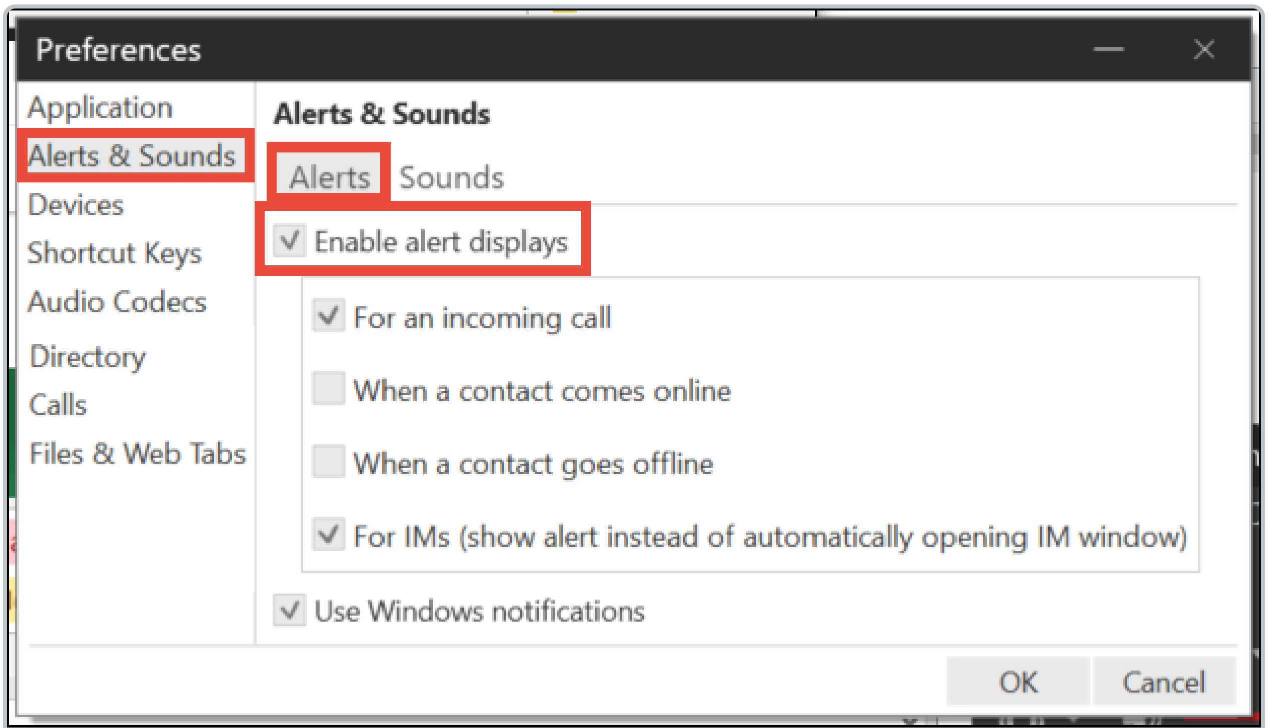


Figure 06: Alerts & Sounds - Alerts Tab

Select the **Sounds** tab to display available fields on this tab:

- **Enable sounds**: Select this checkbox to allow sounds to play and make selection of available sounds possible.

- **For an incoming call**: Select this checkbox to enable a sound to be played when an incoming call is received.
    - **For call waiting**: Select this checkbox to enable a sound to be played when an occupied representative receives another call.
    - **For auto answer**: Select this checkbox to enable a sound to be played when an auto-answer call is received.
    - **For hangup**: Select this checkbox to enable a sound to be played when a call is disconnected via hangup.
    - **For an incoming IM**: Select this checkbox to enable a sound to be played when an IM is incoming.
    - **When a contact comes online**: Select this checkbox to enable a sound to be played when a contact comes online.
    - **When a contact goes offline**: Select this checkbox to enable a sound to be played when a contact goes offline.
- **Sound preference**: Select the **Browse** button and navigate to the location your preferred audio file is stored. Select the preferred audio then select the **Open** button, or double-click the preferred audio file. When you are returned to the **Preferences>Alerts & Sounds>Sounds** tab select the **Play** button to hear the audio file.

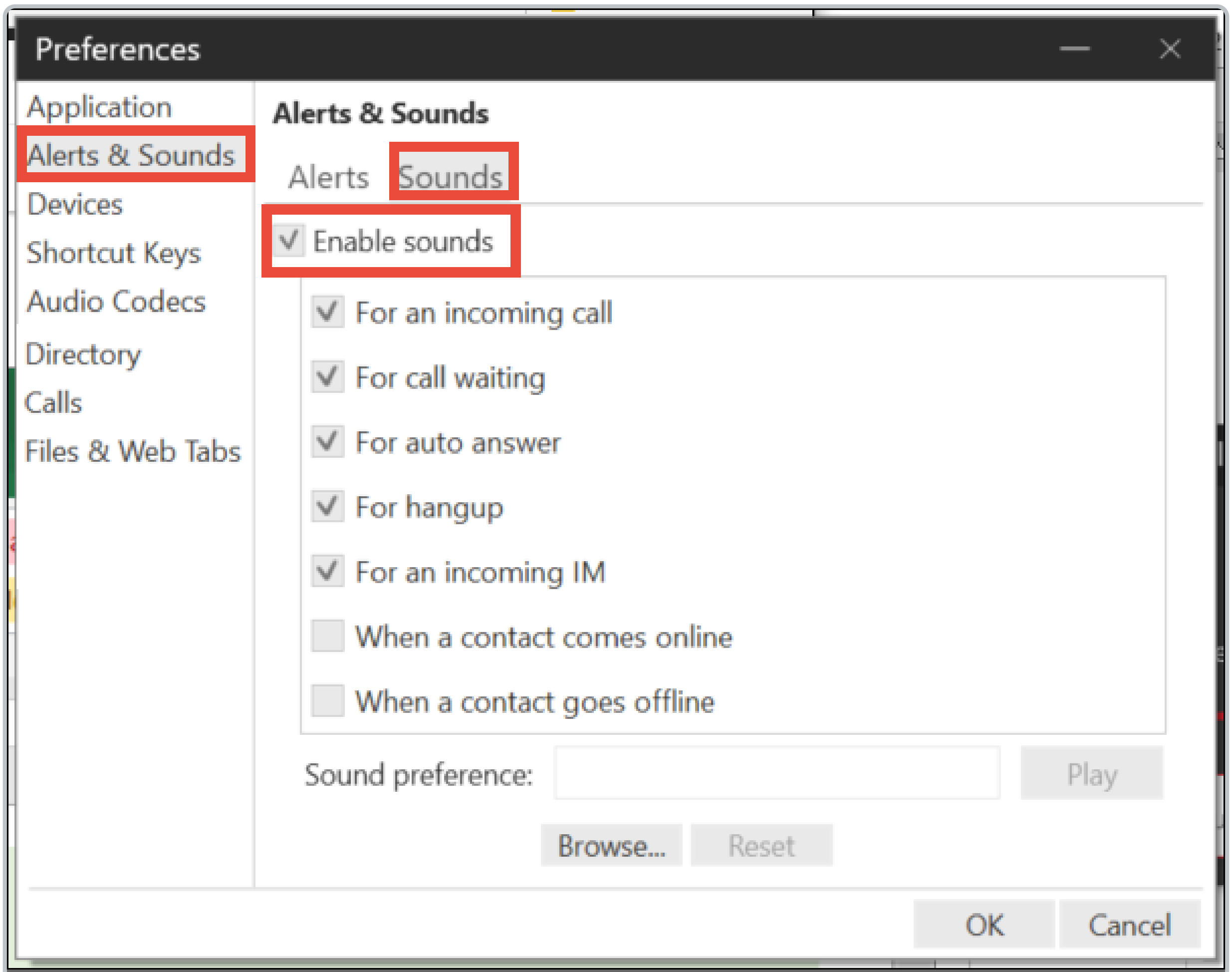


Figure 07: Alerts & Sounds - Sounds Tab

Once your **Alerts & Sounds** preferences are set select the next **Preference** on the left to set those preferences or select the **OK** button in the bottom-right of the pop-up to accept your changes.

Devices

Select the **Devices** preference to update settings for available devices. The **Test Devices>Headset Mode** tab is displayed by default.

Fields under Preferences>Devices>Headset Mode include:

- **Speaker**: Select the appropriate speaker device from the drop-down list.
- **Microphone**: Select the appropriate microphone device from the drop-down list.

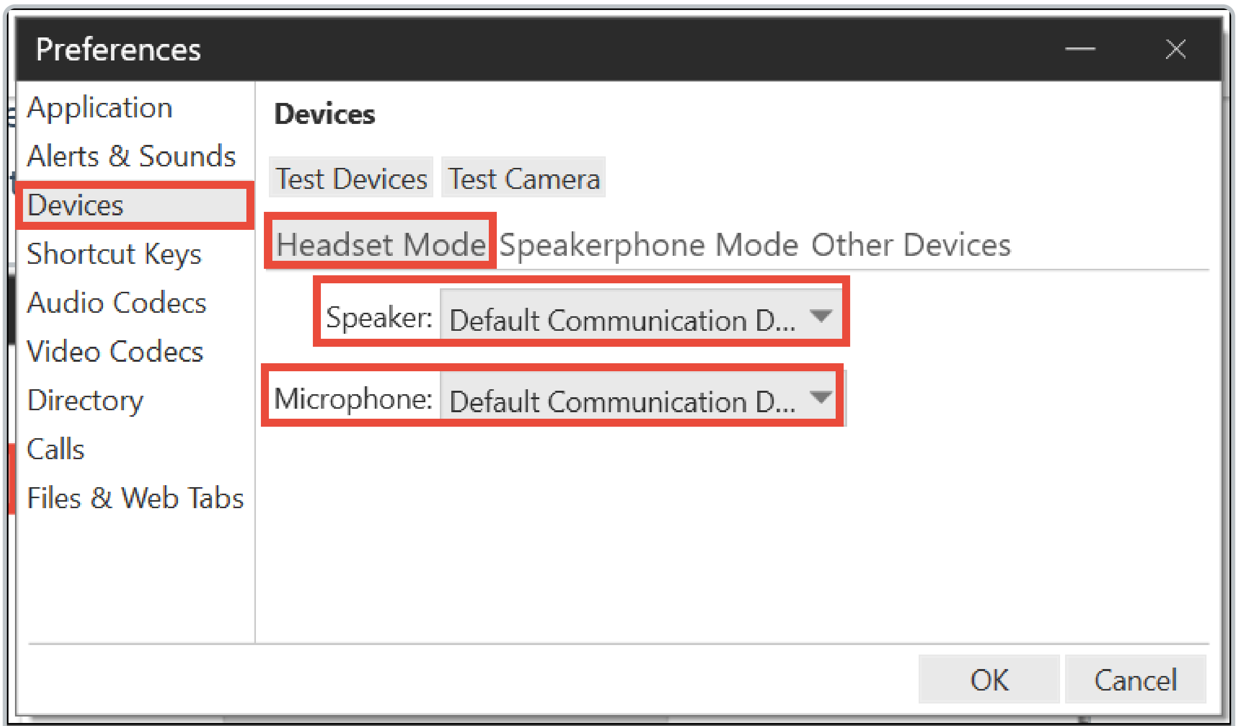


Figure 08: Devices - Test Devices - Headset Mode Tab

Fields under **Test Devices>Speakerphone Mode** include:

- **Speaker**: Select the appropriate speaker device from the drop-down list.
- **Microphone**: Select the appropriate microphone device from the drop-down list.
- **Reduce echos from speakers (AEC)**: Select the checkbox to enable reduction of echos encountered from the selected speakers.

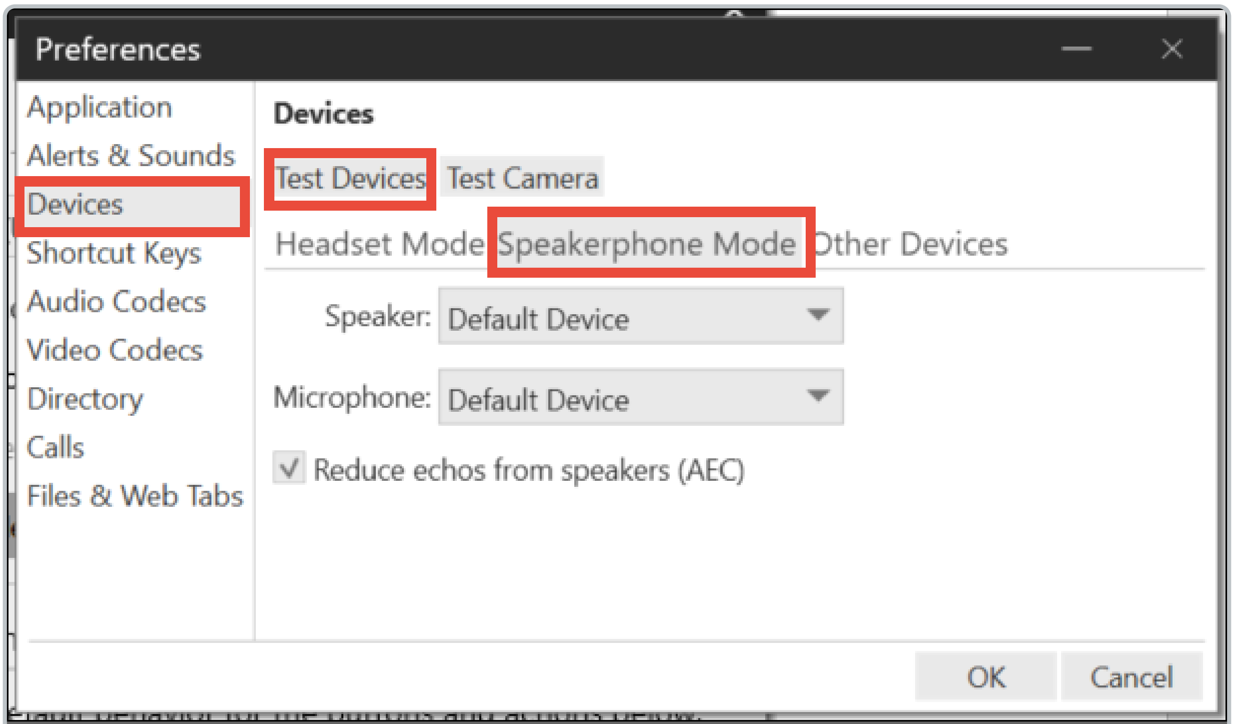


Figure 09: Devices - Test Devices - Speakerphone Mode Tab

Fields under **Test Devices>Other Devices** include:

- **Ring On**: Select the appropriate device from the drop-down list.
- **Camera**: Select the appropriate camera from the drop-down list.
- **Max Resolution**: Select the appropriate maximum resolution setting from the drop-down list.

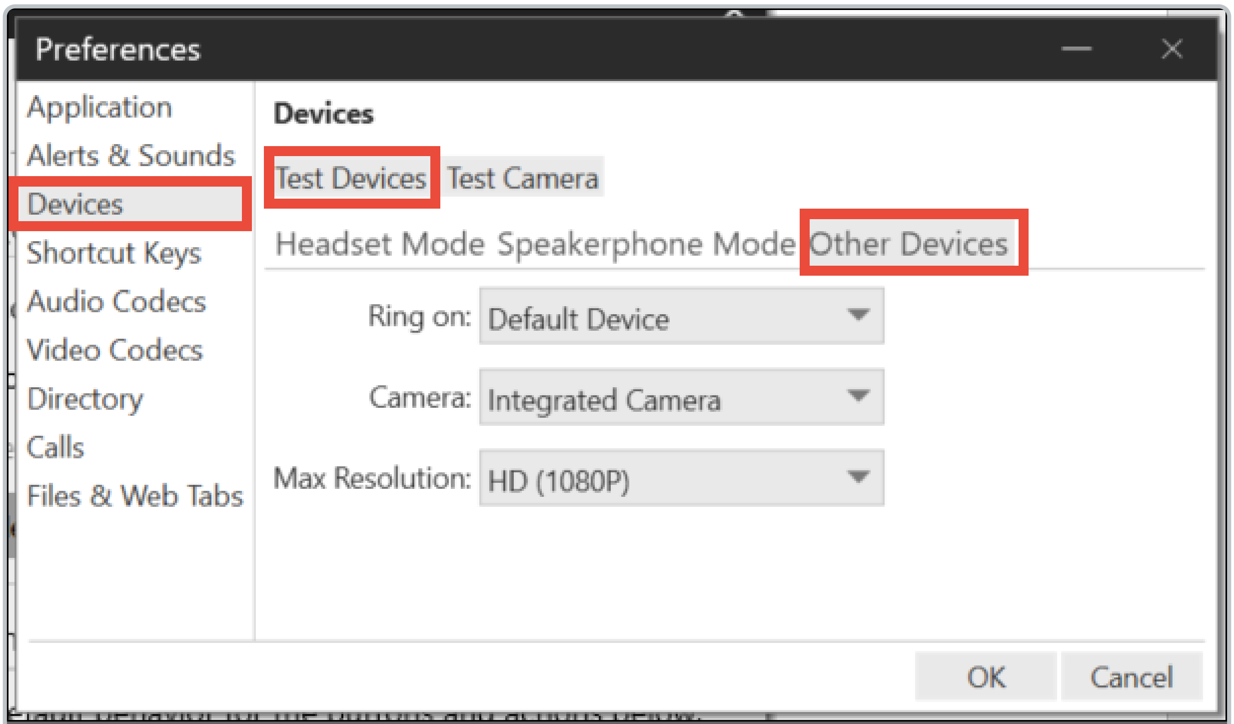


Figure 10: Devices - Test Devices - Other Devices Tab

Select the **Test Camera** tab to activate your computer's camera to test how it looks.

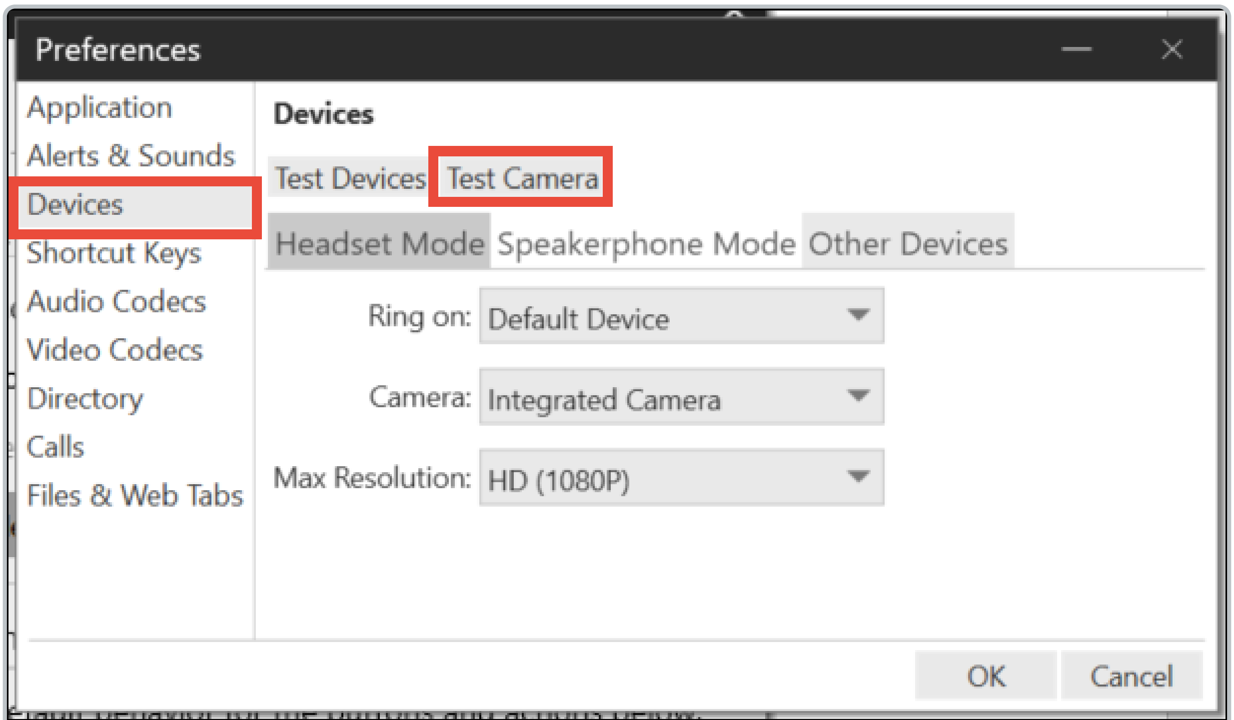


Figure 11: Devices - Test Camera

Once your **Devices** preferences are set select the next **Preference** on the left to set those preferences or select the **OK** button in the bottom-right of the pop-up to accept your changes.

Shortcut Keys

Select the **Shortcut Keys** preference to enable the use of keyboard shortcuts. When the **Shortcut Keys** screen is displayed select the **Enable shortcut keys** checkbox to allow keyboard shortcuts to be defined and used.

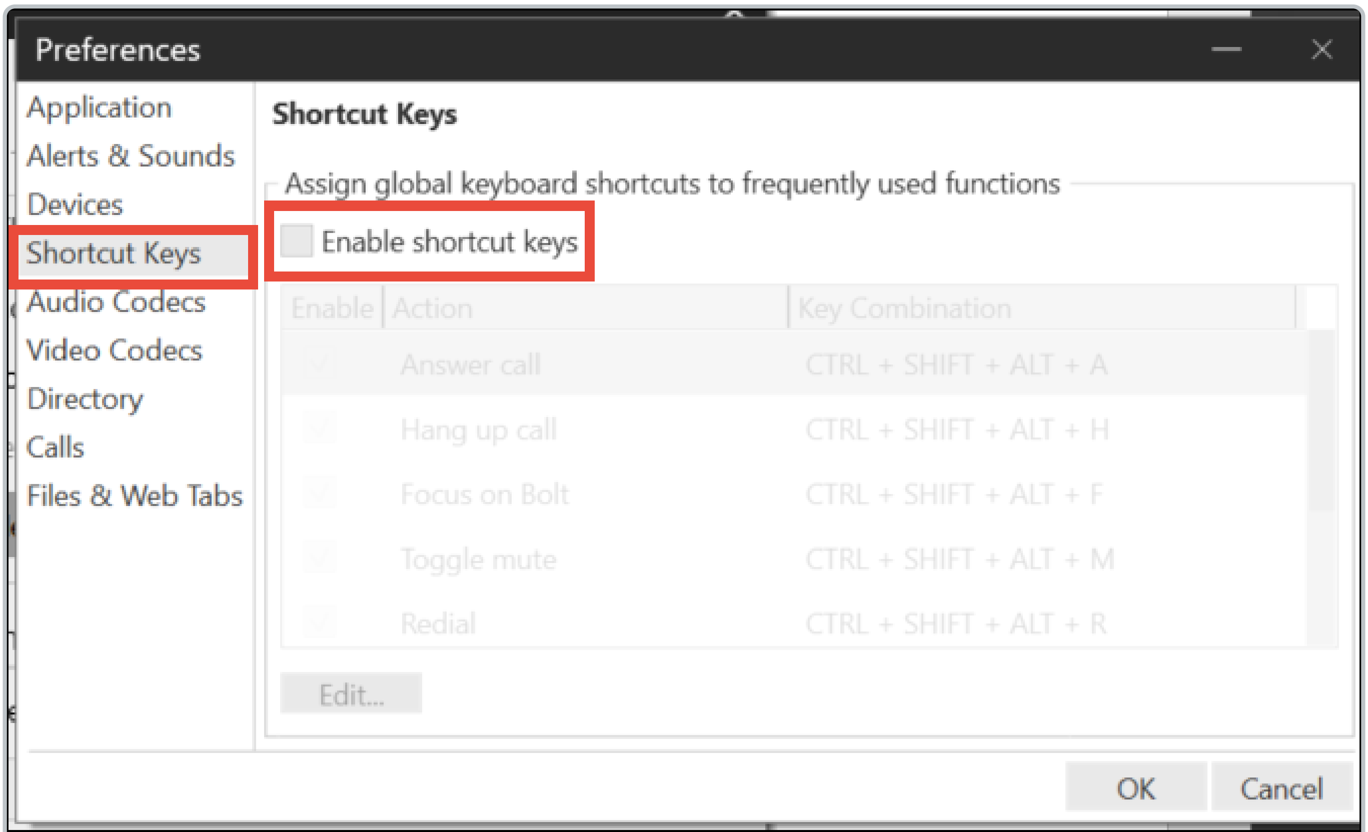


Figure 12: Shortcut Keys - Enable Shortcut Keys

Select the checkbox for each **Action** you want to enable.

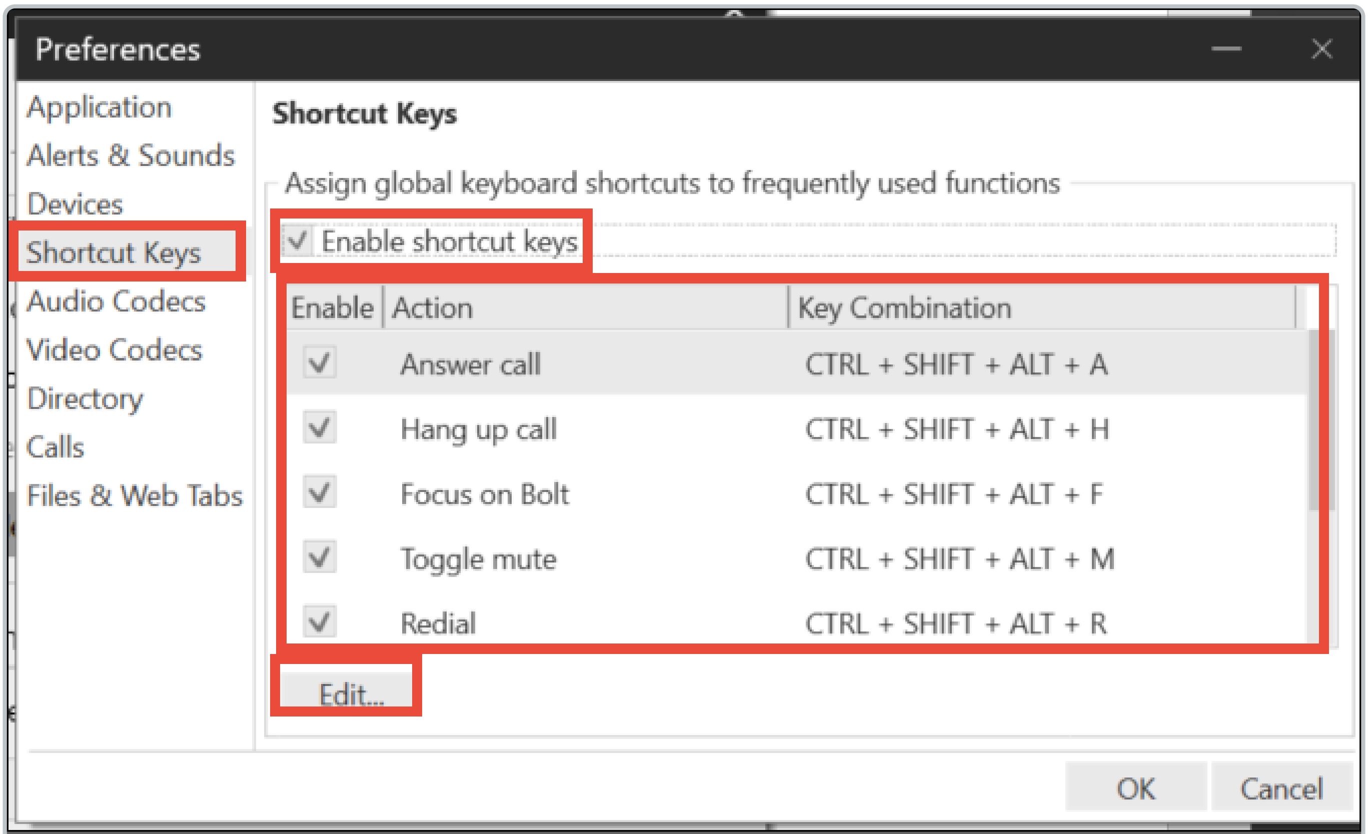


Figure 13: Shortcut Keys: Enable Shortcut Keys

If you want to define a new **Key Combination** for an **Action**, select the **Action** then select the **Edit** button.

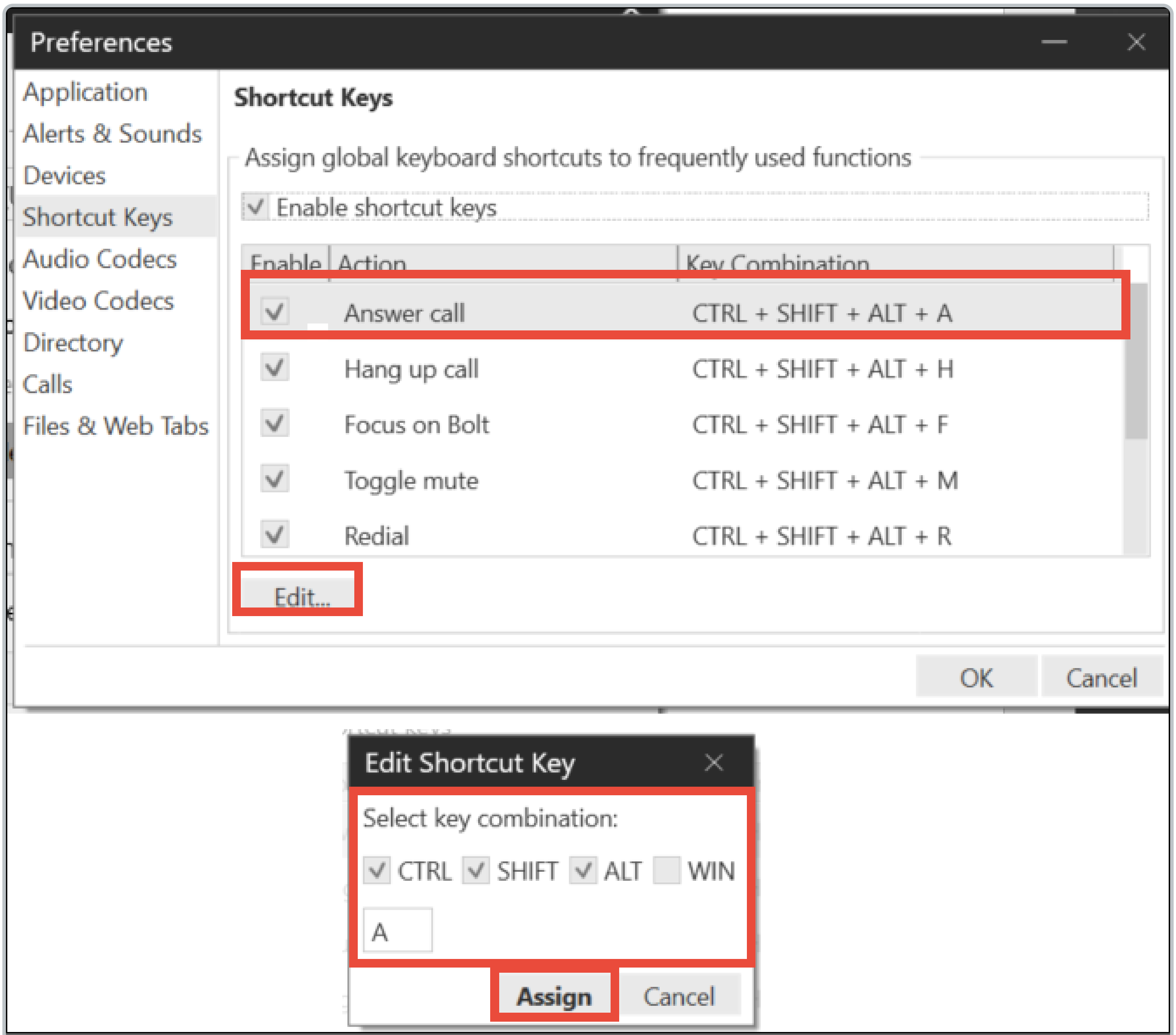


Figure 14: Shortcut Keys - Edit

Once your **Shortcut Keys** preferences are set select the next **Preference** on the left to set those preferences or select the **OK** button in the bottom-right of the pop-up to accept your changes.

Directory

Select the **Directory** preference to update directory settings. Select the appropriate **Directory Type** from the drop-down list.

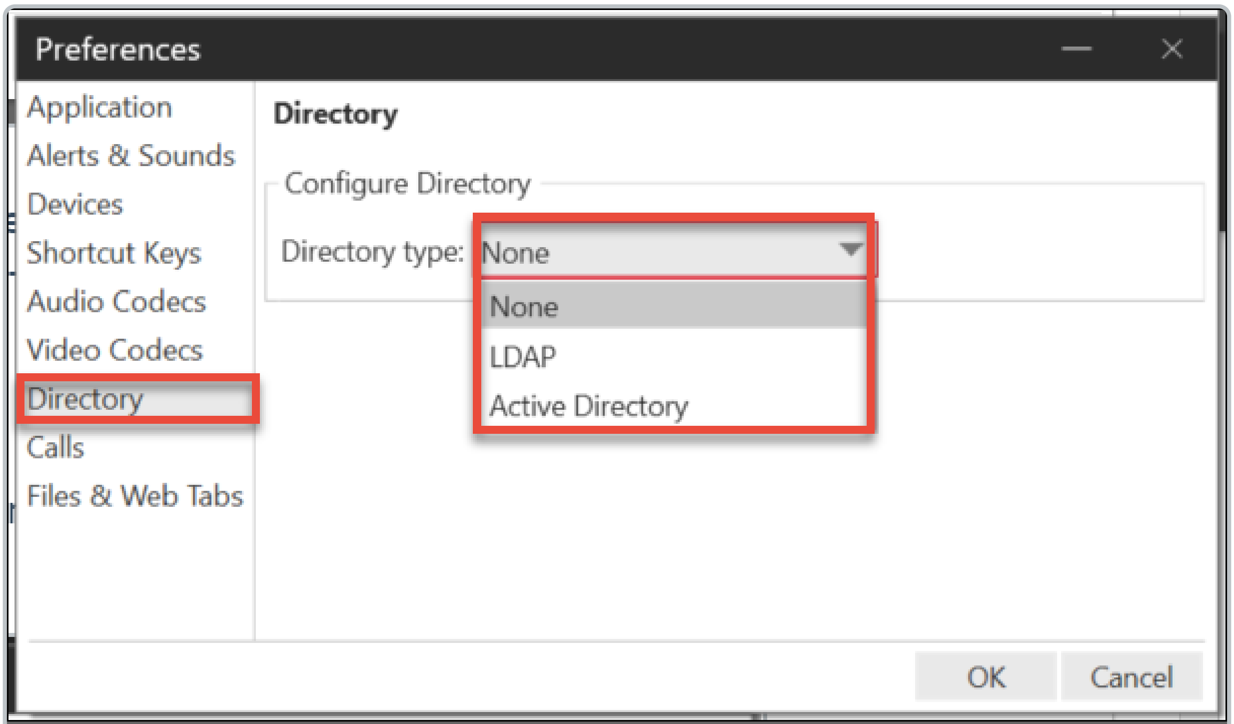


Figure 15: Diretory

Once your **Directory** preferences are set select the next **Preference** on the left to set those preferences or select the **OK** button in the bottom-right of the pop-up to accept your changes.

Calls

Select the **Calls** preference to update the **calls** settings.

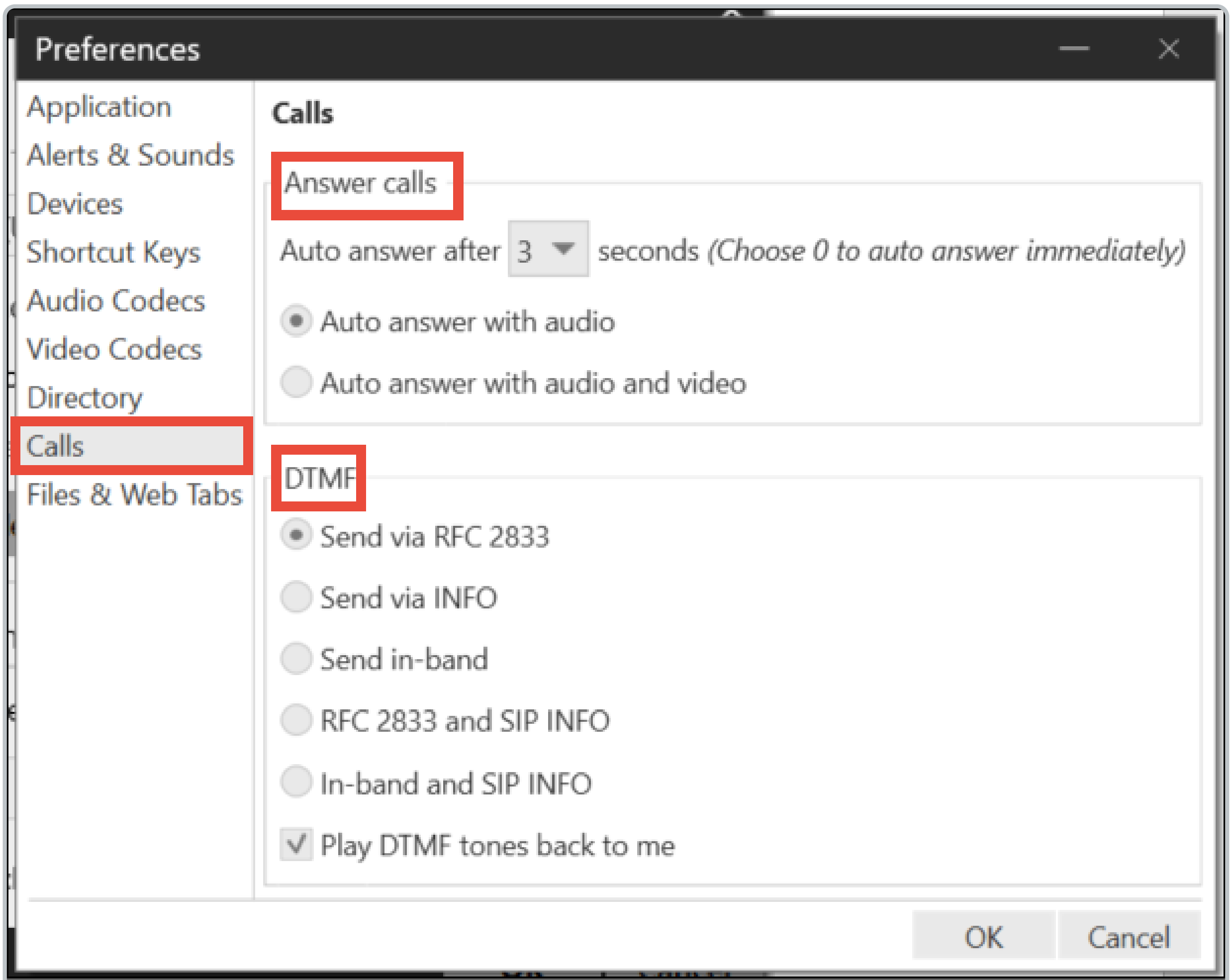


Figure 16: Calls

Fields under **Calls>Answer Calls** include:

- Auto answer after ## seconds (Choose 0 to auto answer immediately): Select, from the drop-down list, the appropriate number (##) of seconds after which a call should be answered.
- Select the radio button for either **Auto answer with audio** or **Auto answer with audio and video**.

Fields under **Calls>DTMF** include:

- Select the appropriate radion button for one of the following:
  - **Send via RFC 2833**
  - **Send via INFO**
  - **Send in-band**
  - **RFC 2833 and SIP INFO**
  - **In-band and SIP INFO**

- Select the **Play DTMF tones back to me** checkbox if appropriate.

Once your **Calls** preferences are set select the next **Preference** on the left to set those preferences or select the **OK** button in the bottom-right of the pop-up to accept your changes.

Files & Web Tabs

Select the **Files & Web Tabs** preference to update the settings.

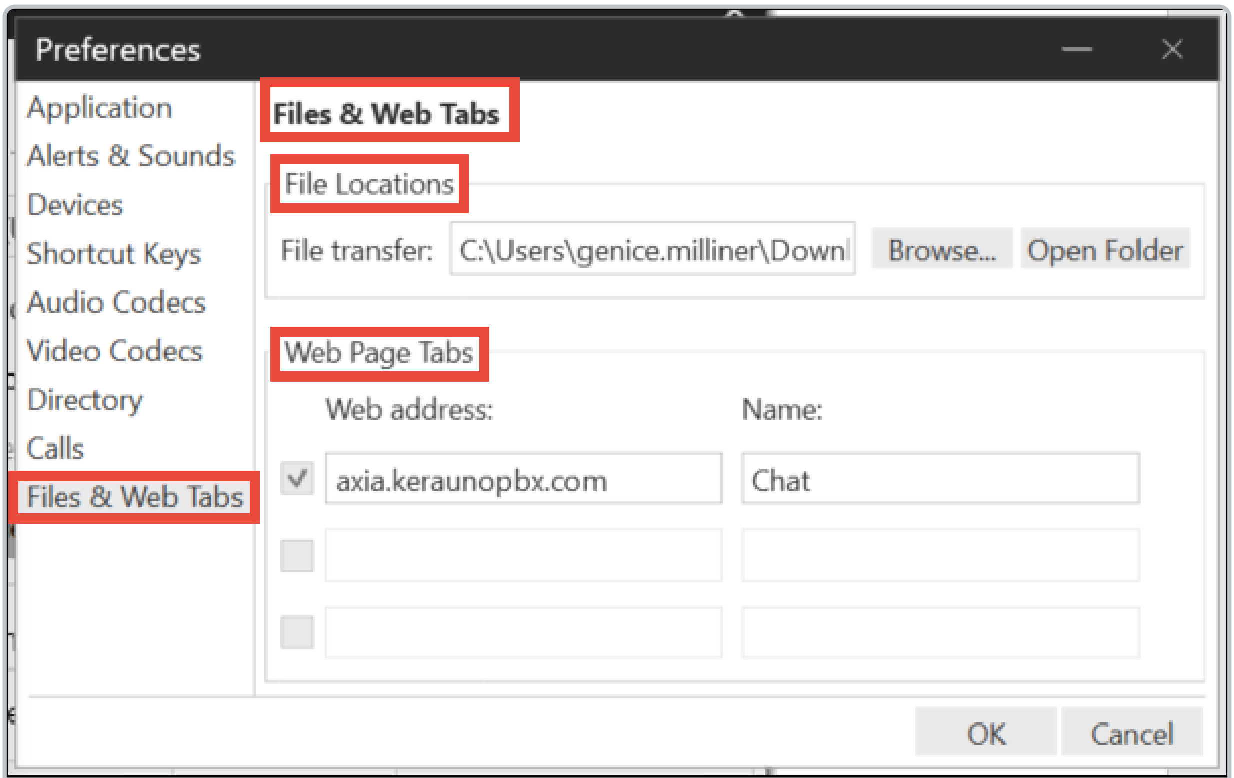


Figure 17: Files & Web Tabs

Under **File Location** enter the path to be used for **File Transfer**. You can use the **Browse** button to search for folder.

Under **Web Page Tabs** select a checkbox to add a new row then enter the appropriate **Web address** and **Name** for the Web Page Tab.

Once your **Files & Web Tabs** preferences are set select the **OK** button in the bottom-right of the pop-up to accept your changes.

Disable/Enable Call Waiting in Bolt for Windows

Last Modified on 08/01/2018 8:05 am EDT

Call Waiting is a service that notifies an individual on a telephone call of an incoming call. When it is enabled it allows the first call to be placed on hold while the second call is answered. Call Waiting can be disabled/enabled at any time.

Disable/Enable Call Waiting

You can easily enable or disable call waiting at any time by selecting the down-arrow to the right of the volume slider to display a drop-down list of options. Select the **Call Waiting** option to enable it or disable it. A checkmark to the left of the option indicates it is enabled; no checkmark indicates it is disabled ((as illustrated in Figure 01 and Figure 02 below).

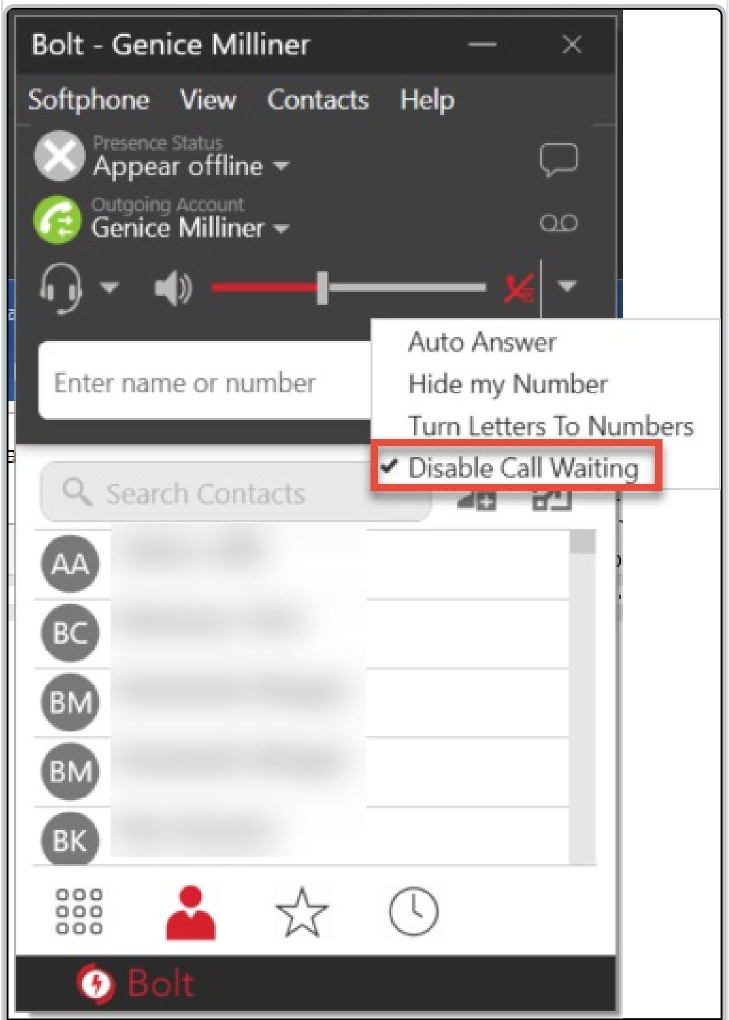


Figure 01 Call Waiting Disabled

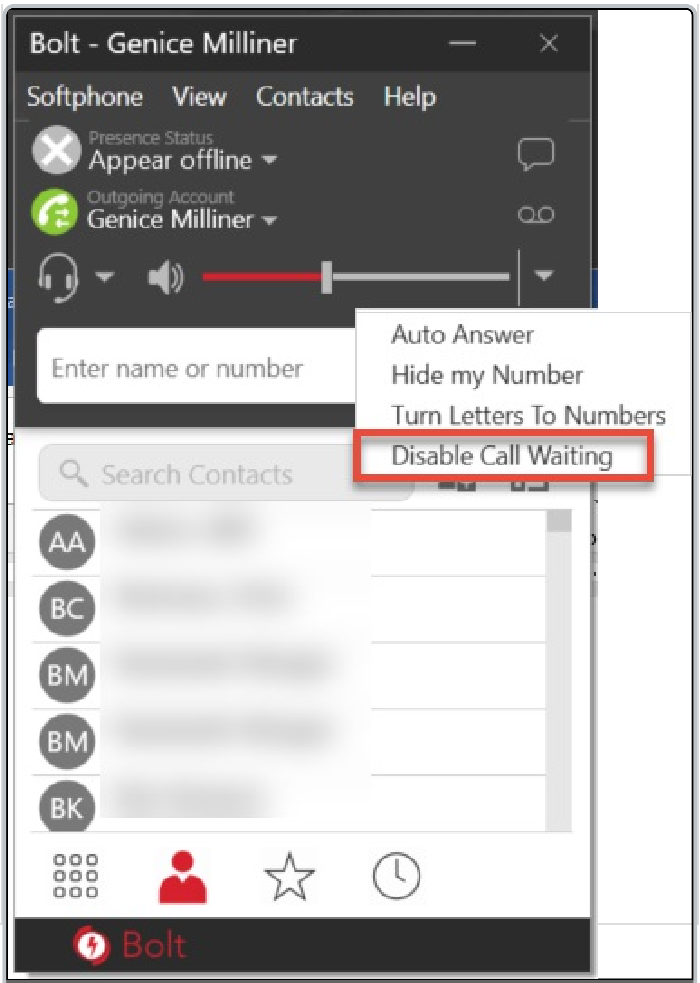


Figure 02 Call Waiting Enabled

Incoming Calls in Bolt for Windows

Last Modified on 07/31/2018 1:29 pm EDT

Incoming calls may be answered with Bolt softphone as well as a physical handset.

NOTE:	Bolt must be running to answer incoming calls (it can be running in the system tray). If Bolt is not running, incoming calls may be directed to voicemail; check with your system administrator or VoIP service provider.

When a new call is received it is displayed in its own **Call Panel** as illustrated in Figure 01 below. Select one of the following from the **Call Panel**:

- **Green Phone Button**: Accepts the call for you to answer.
- **Right Arrow Button**: Forwards the call.
- **Red Phone Button**: Refuses the call and sends it to voicemail.

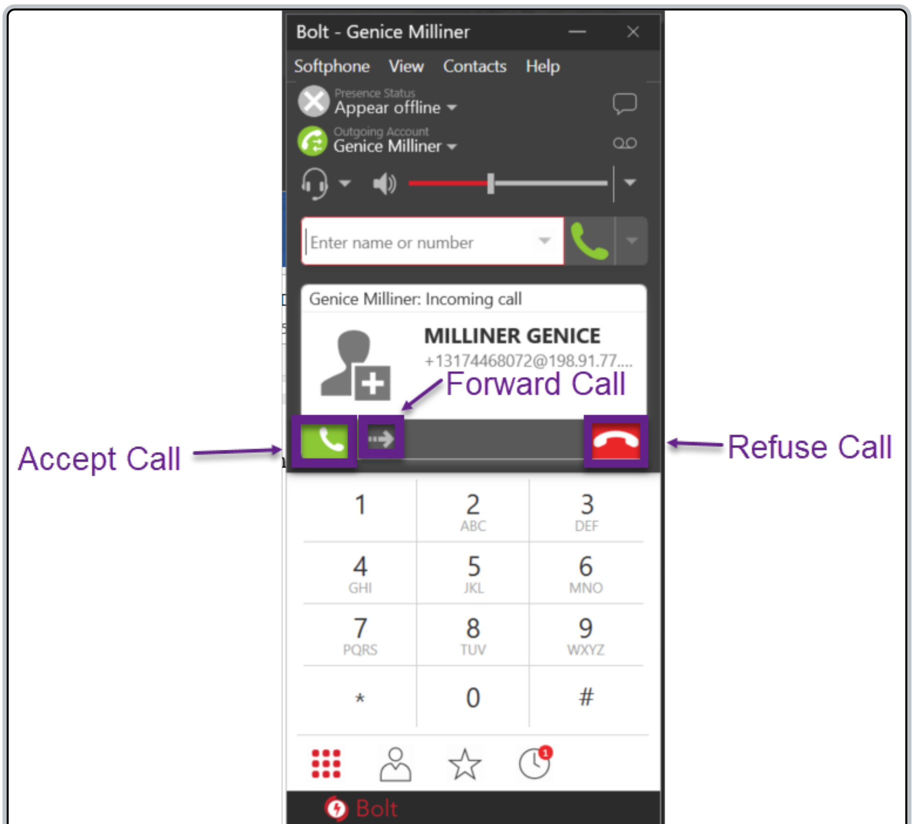


Figure 01 Incoming Call

The new call is also displayed in the **Call Alert** box as illustrate in Figure 02 below.

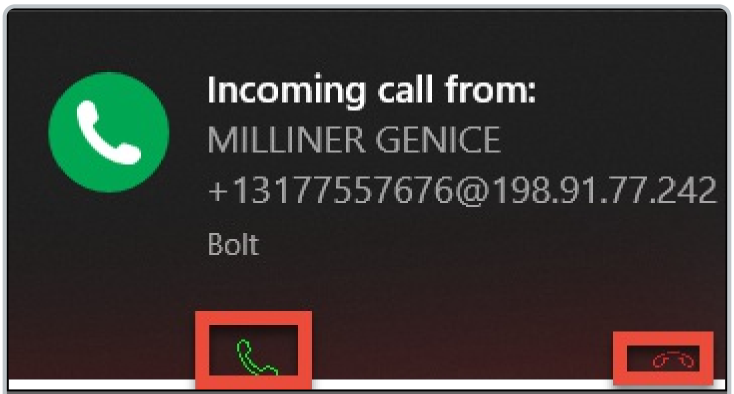


Figure 02 Call Alert Box

Select the green phone receiver icon to ansewr the call; select the red phone received icon to decline the call and send it to voicemail.

Managing Contacts in Bolt for Windows

Last Modified on 08/02/2018 2:38 pm EDT

NOTE:	Bolt contacts are local to that instance of Bolt. Kerauno will contain the contacts for the user across all devices. Deleting a contact in Bolt will not delete the record in Kerauno (refer to the Important differences between Bolt and Kerauno Presence article for more information).

Your contacts can be easily managed in Bolt. You can add, edit, and delete contacts from your list as well as search and sort your contacts.

Contacts Tab

The **Contacts** tab displays a full list of your contacts for single-click calling and a search bar for finding specific contacts in the list. To view your contacts list select the **Contacts** icon at the bottom of the screen as indicated in Figure 01 below.

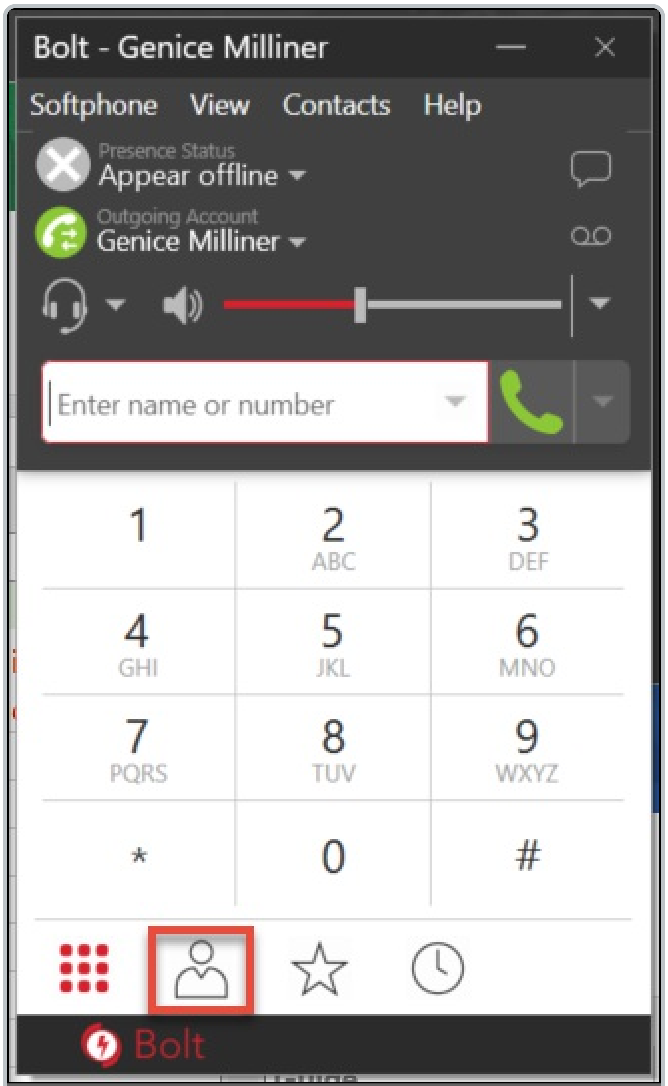


Figure 01 Contacts Icon

When the **Contacts** tab is displayed you can select a contact then select the **Phone** icon to call the selected contact (refer to Figure 02 below).

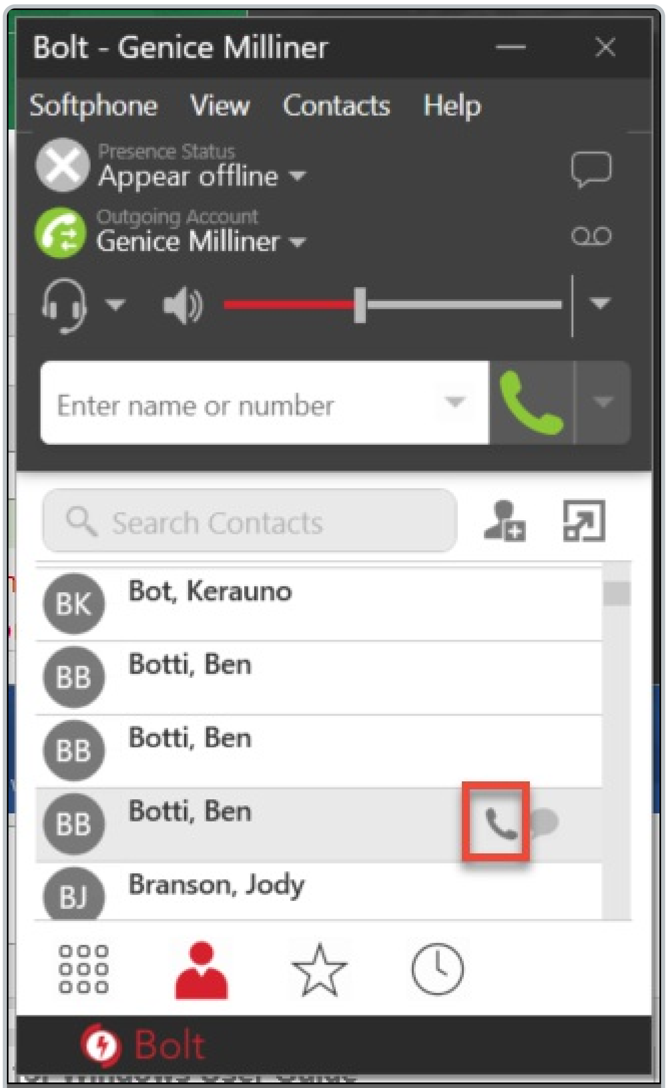


Figure 02 Contacts Tab

You can right-click a contact name to display a shortcut menu as indicated in Figure 03 below.

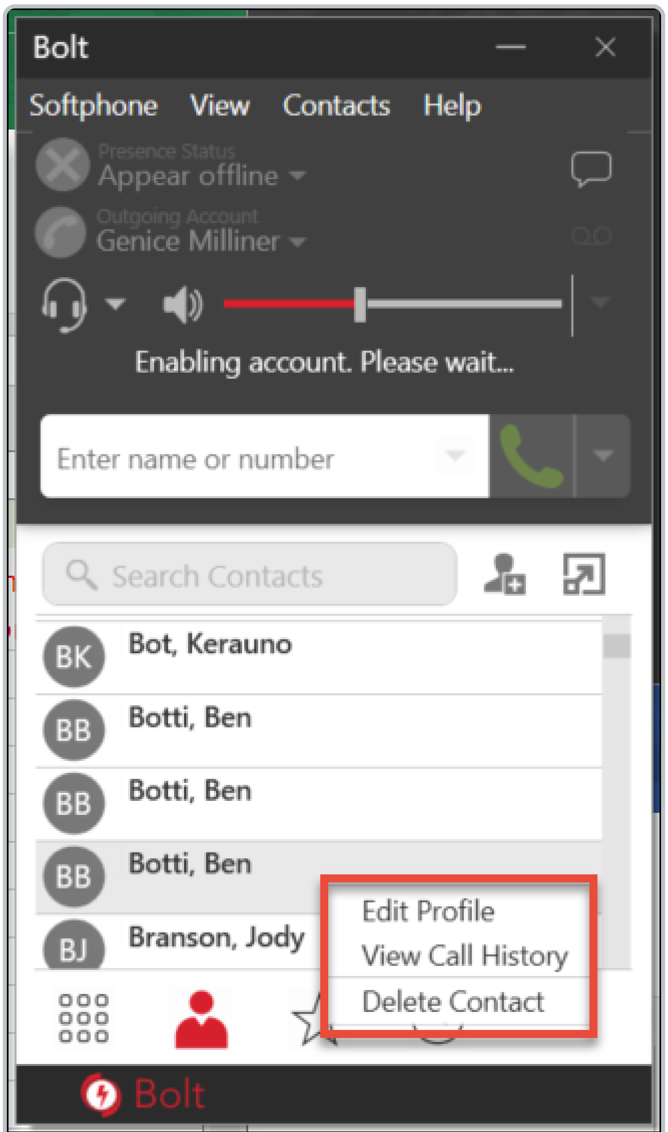


Figure 03 Contacts Shortcut Menu

Further information about **Profiles** can be found in the **Profiles in Bolt** article and information regarding **Call Histories** is located in the **Bolt: Call History** article. Both articles are located in the knowledge base under **Bolt Help>Bolt for Windows**.

Editing a Contact

From the Bolt **Contacts** screen, right click the contact you want to edit to display a pop-up menu as illustrated in Figure 04 below.

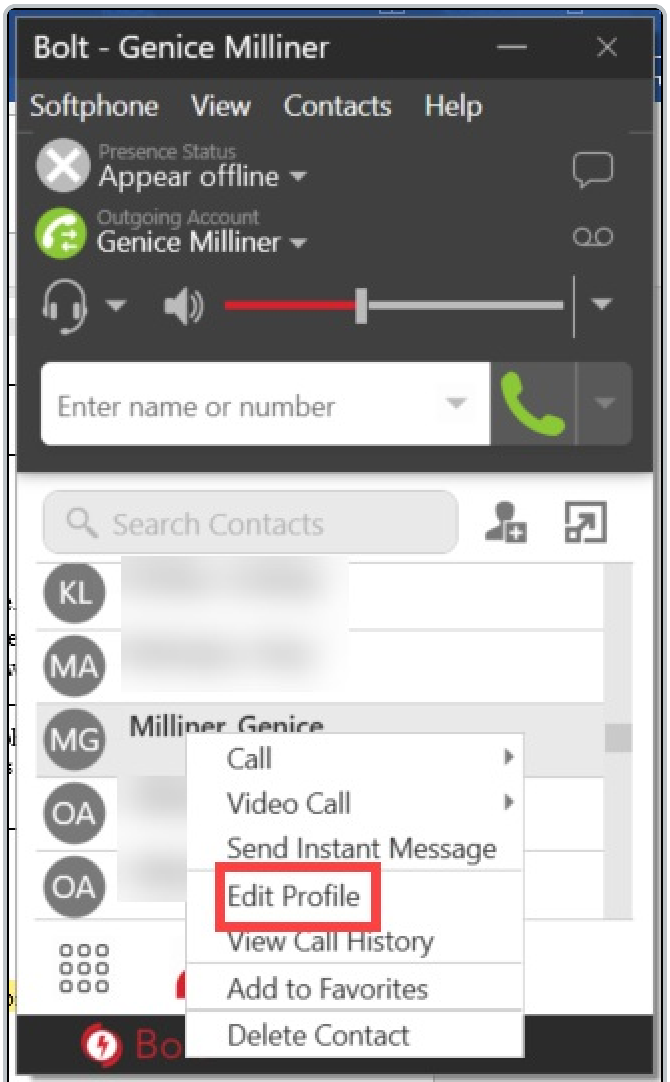


Figure 04 Right-Click Contact Pop-Up

Select **Edit Profile** from the pop-up menu to display the **Contact Profile** screen as illustrated in Figure 06 below. You can also click the contact to display an abbreviated menu as illustrated in Figure 05 below.

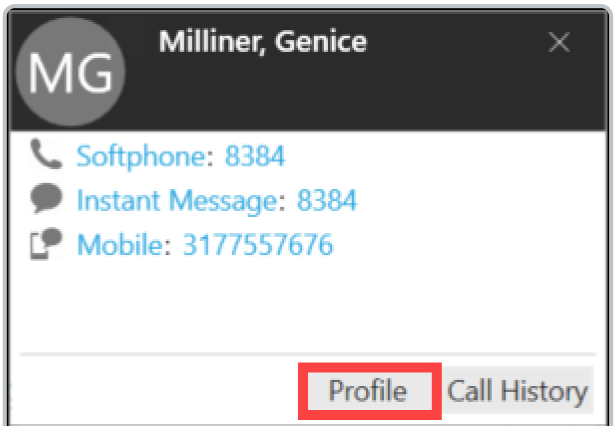


Figure 05 Abbreviated Pop-Up Menu

Select the **Profile** button at the bottom-right of the abbreviated menu to display the the **Contact Profile** screen as illustrated in Figure 06 below.

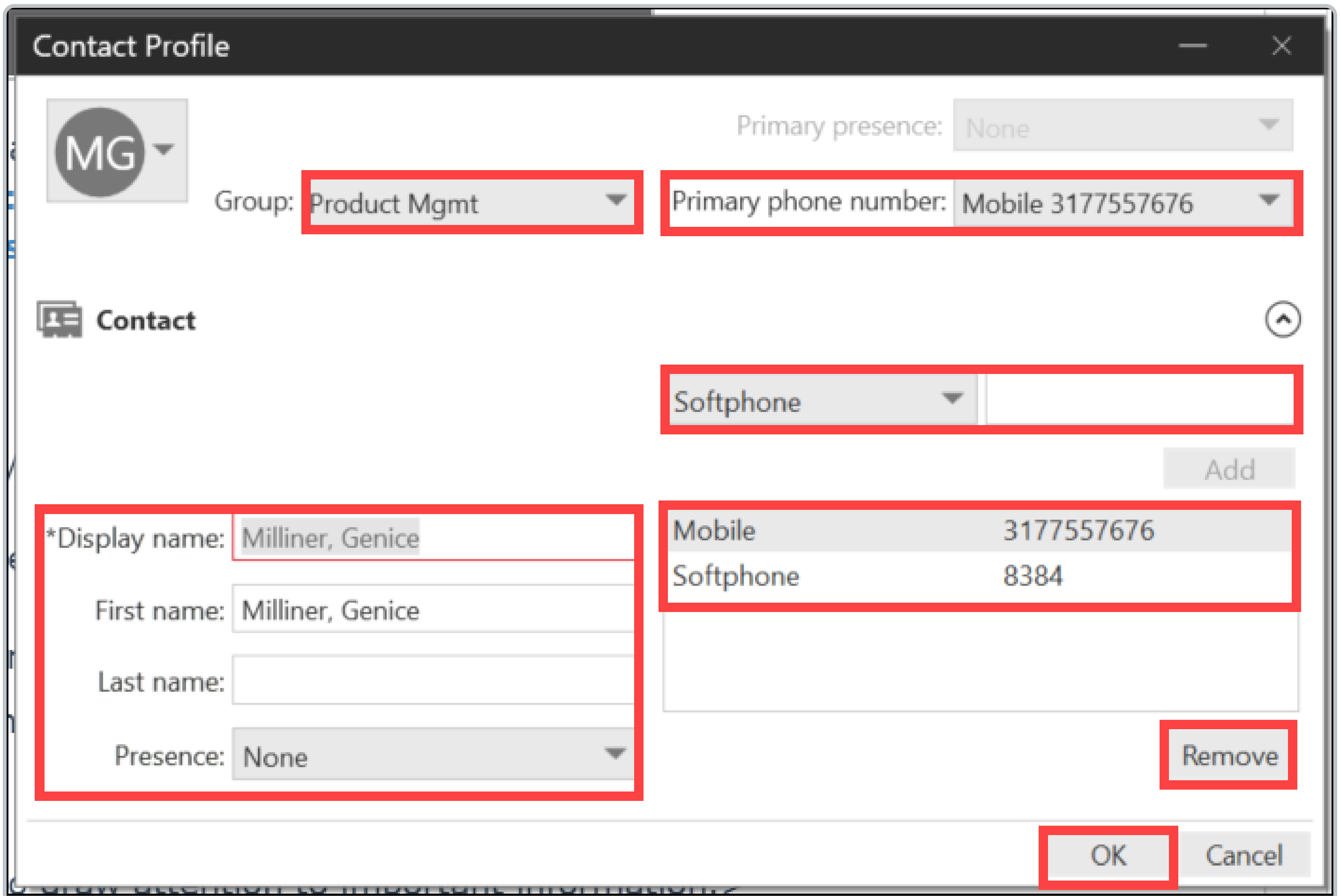


Figure 06 Contact Profile Screen

From the Contact Profile screen you can:

- Update
  - Group
  - Primary Phone Number
  - Display Name
  - First Name
  - Last Name
  - Presence phone number
- Add a new number
- Remove an existing number

Select the **OK** button at the bottom-right of the screen when you have finished your edits.

Adding a Contact

There are multiple ways to add new contacts. First, contacts can be added using the **Add a new contact** button from the **List of contacts** screen, from the **Contacts** menu, or from the **Contact History** screen.

To add a contact via the **List of contacts** screen select the **Add a new contact** button as illustrated in Figure 04 below.

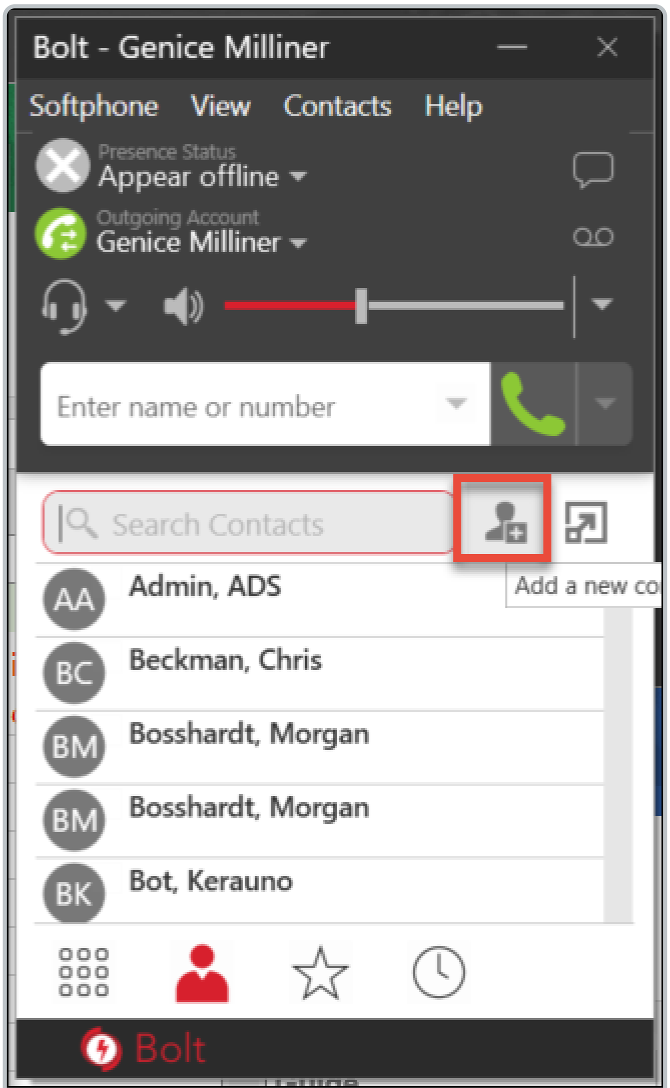


Figure 04 Add a New Contact Button

This displays the **Contact Profile** Screen as illustrated in Figure 05 below.

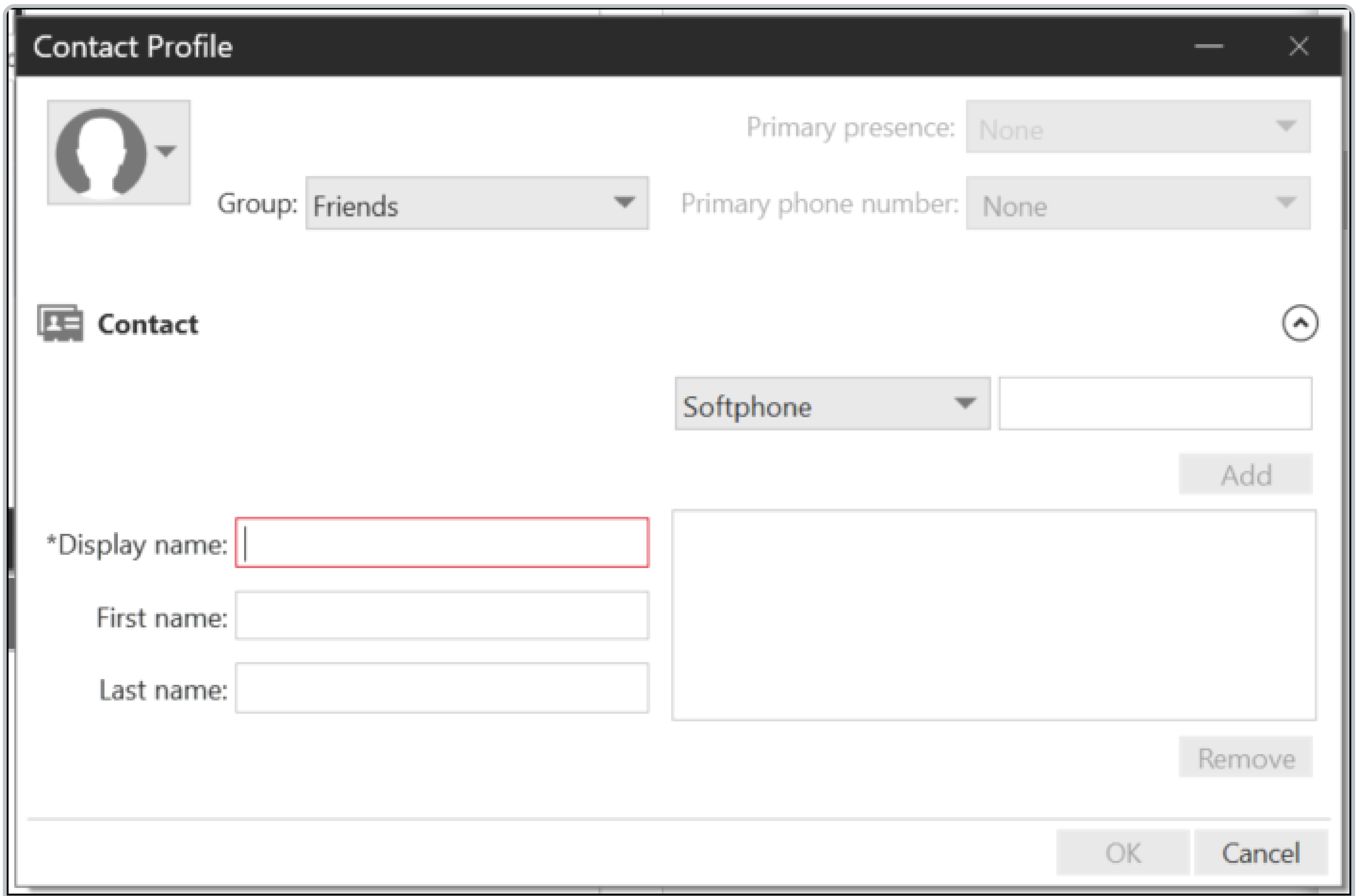


Figure 05 Contact Profile Screen

Select the appropriate **Group** from the drop-down list:

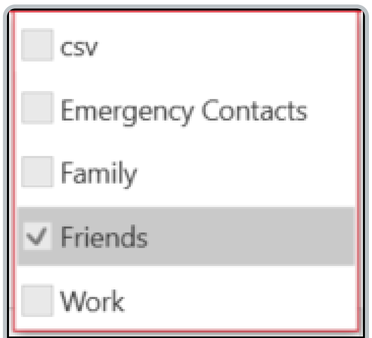


Figure 06 Group Drop-Down List

Enter data in the following fields:

- **Display Name** (usually first and last name): This is the contact's name which displays in the Bolt phone book. This is a required field.
- **First Name**: The contact's first name.
- **Last Name**: The contact's last name.

Select the **Location** for the phone number:

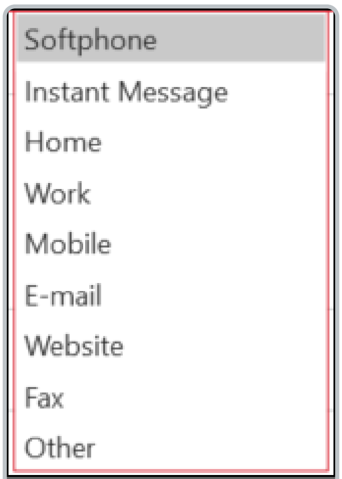


Figure 07 Location Drop-Down List

Enter the contact's phone number in the field to the right of the **Location** drop-down. Then, select the **Add** button to add the contact number.

NOTE:	Multiple numbers can be entered for a contact (e.g., work, mobile, fax, etc.).

Select the **OK** button to save your changes.

You can also select **Contacts** from the main menu then select **Add Contact** (as illustrated in Figure 08 below) to display the **Contact Profile** screen.

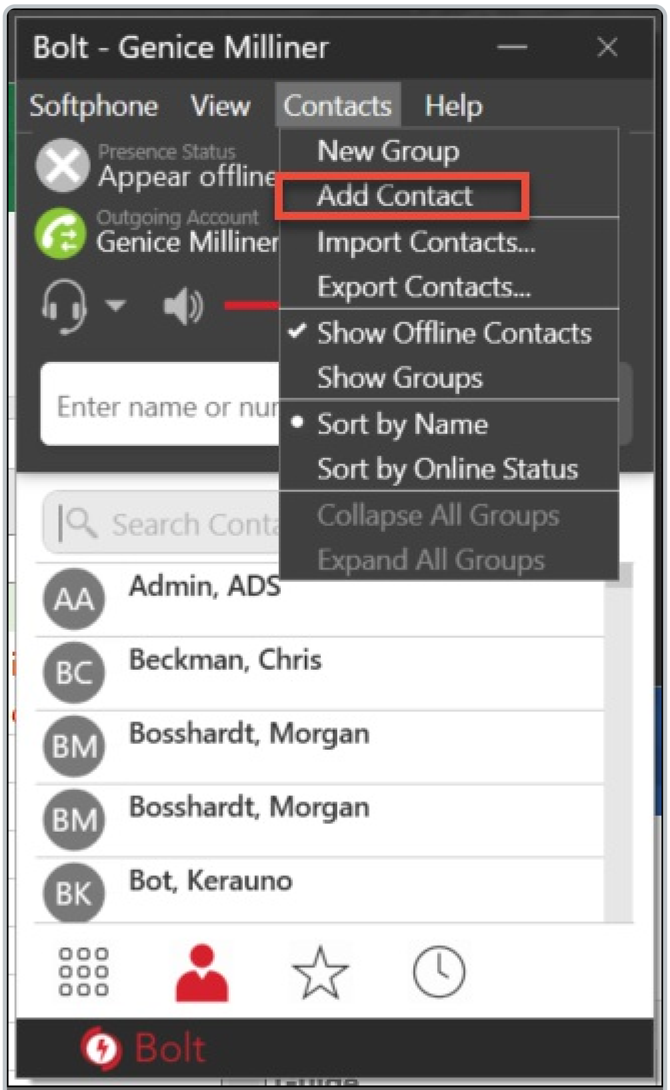


Figure 08 Add Contact Option from Main Menu>Contacts>Add Contact

New contacts can also be added from the **Call History**. Select the **Call History** icon from the bottom of the screen. Then right-click the listing you want to add as a new contact and select **Add as Contact** from the pop-up. The **Contact Profile** screen is displayed with contact information already entered. Make any necessary updates then select **OK** to save the new contact.

Import Contacts

To import existing contacts to Bolt you will first need to create an Excel file to use for importing the contact data.

1. Remove any extraneous or introductory text or headings from the top of the file. (You can keep text at the end of the file; it will be ignored during the import.)
2. Insert a blank row as the first row, then insert the headings that Bolt will use to

interpret the meaning of each column.

3. Save the file as a CSV file.

In Table 01 below is a list of all the headings that are used in the Bolt contact list. This list can be useful when formatting a contact list in order to import it into Bolt.

Heading	Description
business_number	
business_numbern, where n is 2 to 6	
categories	Maps to Bolt groups
default_address	Maps to the Presence field
default_address_comm	Always specifies IM, if default_address is specified. This heading does not map to a Contact Profile field
default_address_type	Specifies SIP or XMPP
display-name	
email_address	
email_addressn, where n is 2 to 6	
fax_number	
fax_numbern, where n is 2 to 6	
given_name	
home_number	
home_numbern, where n is 2 to 6	
mobile_number	
mobile_numbern, where n is 2 to 6	
other_address	
other_addressn, where n is 2 to 6	
postal_address	
presence_subscription	TRUE or FALSE*
sip_address	Maps to the Softphone field
sip_addressn, where n is 2 to 6	
surname	

web_page	
web_pagen, where n is 2 to 6	
xmpp_address	Maps to the Instant Message field. This field must always specify an XMPP address
xmpp_addressn, where n is 2 to 6	
Table 01 List of Import Headings	

* If you only want to share presence information with some of your contacts, fill in this column in the file. Enter “TRUE” for contacts whose online presence you want to see; leave blank or enter “FALSE” for others. During the import, you will be able to choose to share presence with only these contacts. Bolt will subscribe to the presence of these “true” contacts, assuming that you have a SIP (if using SIP for presence) or an XMPP address. If you want to share presence with all your contacts (or with none), ignore this heading. During the import you will be able to choose to share with all (or none) of your contacts.

Once your import file has been created, in Bolt, go to **Contacts>Import Contacts...**

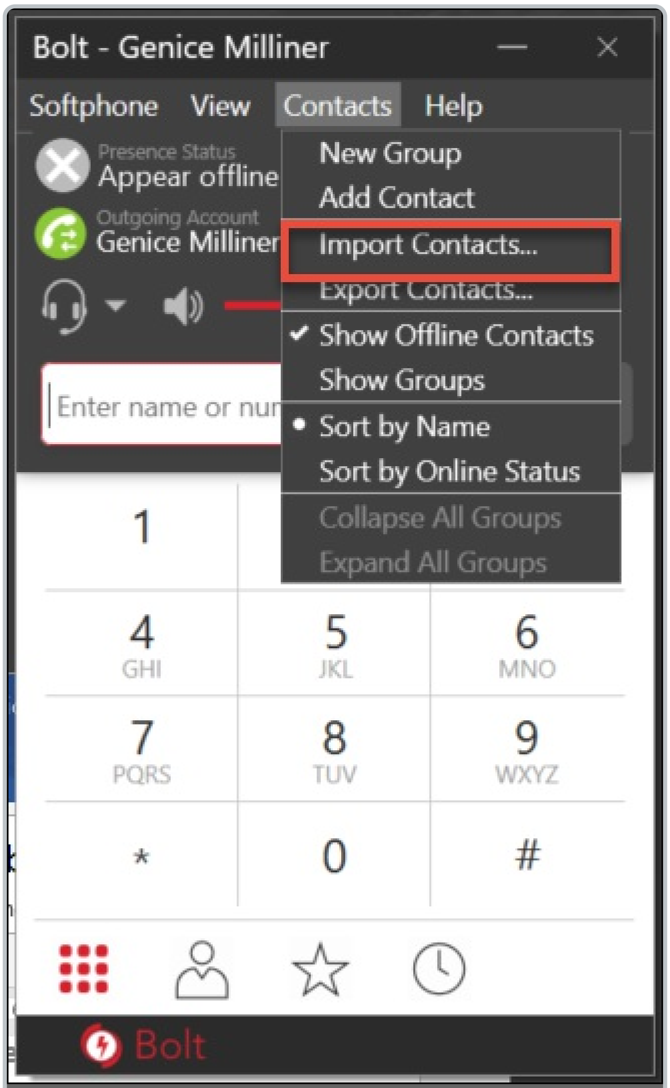


Figure 09 Bolt Import Contacts Menu Option

Select **Comma-separated values (*.csv file)** from the **Import Contacts: Select the file format** pop-up screen (as shown in Figure 10 below) then select the **Next>** button.

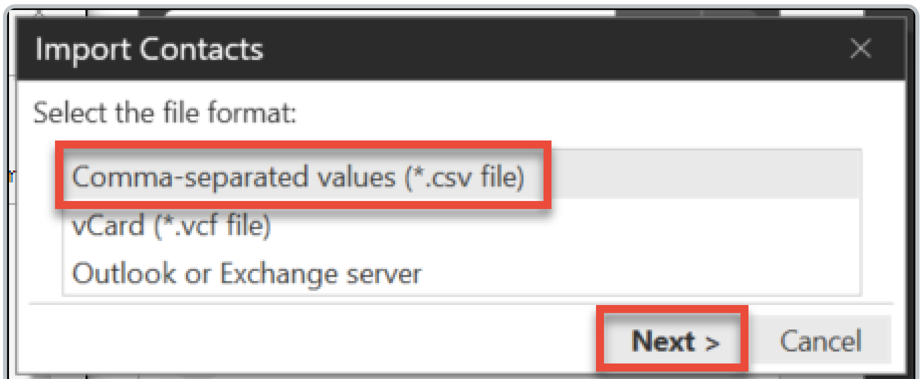


Figure 10 Select Import Contacts

When the **Import Contacts: Select the location of contacts to import** pop-up is displayed enter the path and file name of your CSV file or select the **Browse...** button to navigate to the flle and select it as indicated in Figure 11 below. Then select the

Next> button.

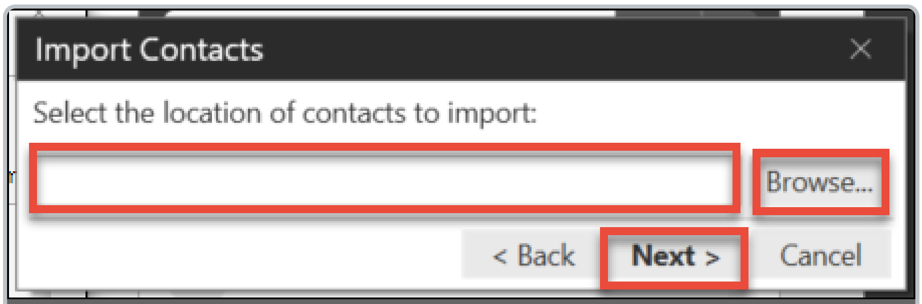


Figure 11 Select Location of Contacts to Import

Once the **Import Contacts: Select Import Options** pop-up is displayed select your **Contact options** and **Presence options for all imported contacts** options (as illustrated in Figure 12 below) and select the **Next>** button.

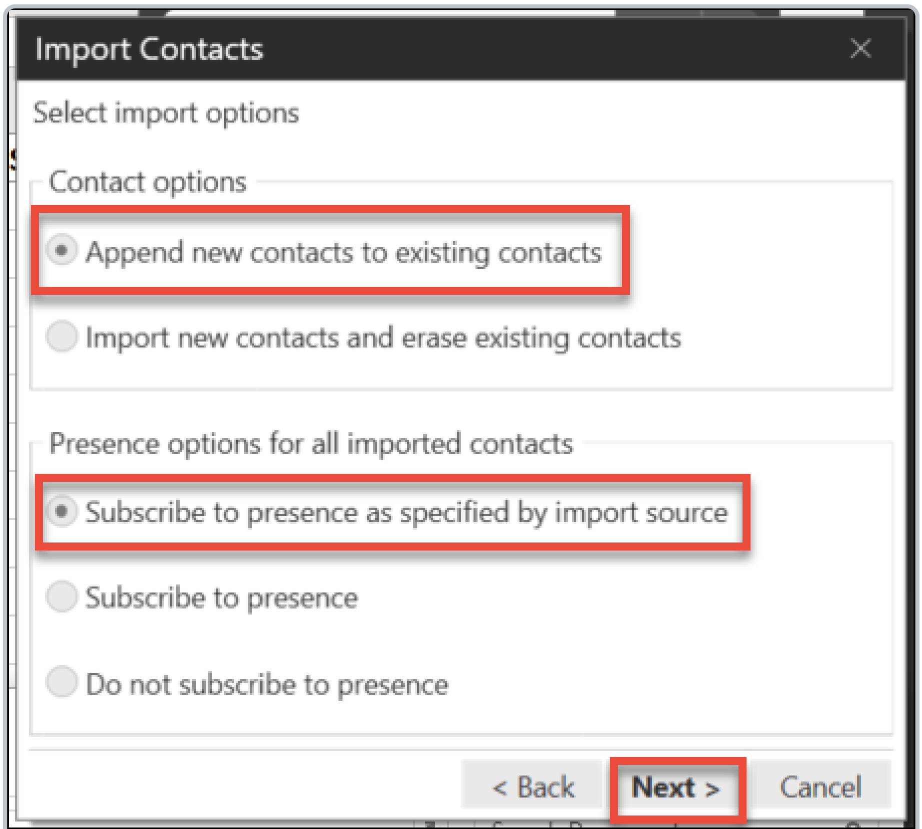


Figure 12 Import Contacts: Select Import Options

NOTE:	It is recommended to select **Append new contacts to existing contacts** as the **Contact options** and S**ubscribe to presence as specified by import source** or **Subscribe to presence** for the **Presence options for all imported contacts** option as indicated in Figure 12 above.

When the **Import Contacts: Import successful** message is displayed, select the

Finish button to complete the process as indicated in Figure 13 below.

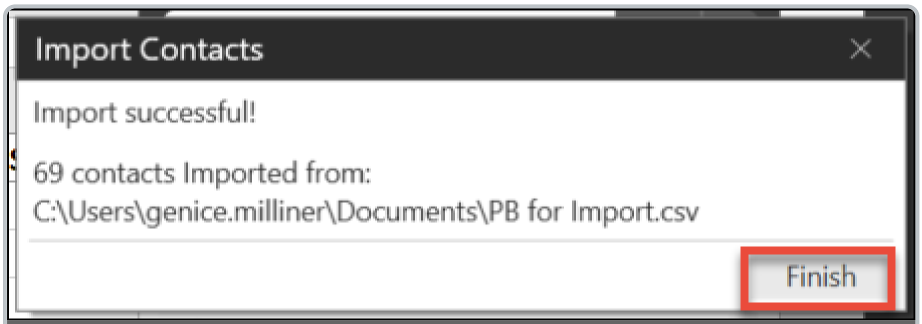


Figure 13 Import Successful Pop-Up

Delete a Contact

If you need to remoce a contact from your contacts list (e.g., contact has left the company or changed positions, duplicant contact, etc.) simply right-click the contact to display a shortcut menu (as illustrated in Figure 14 below).

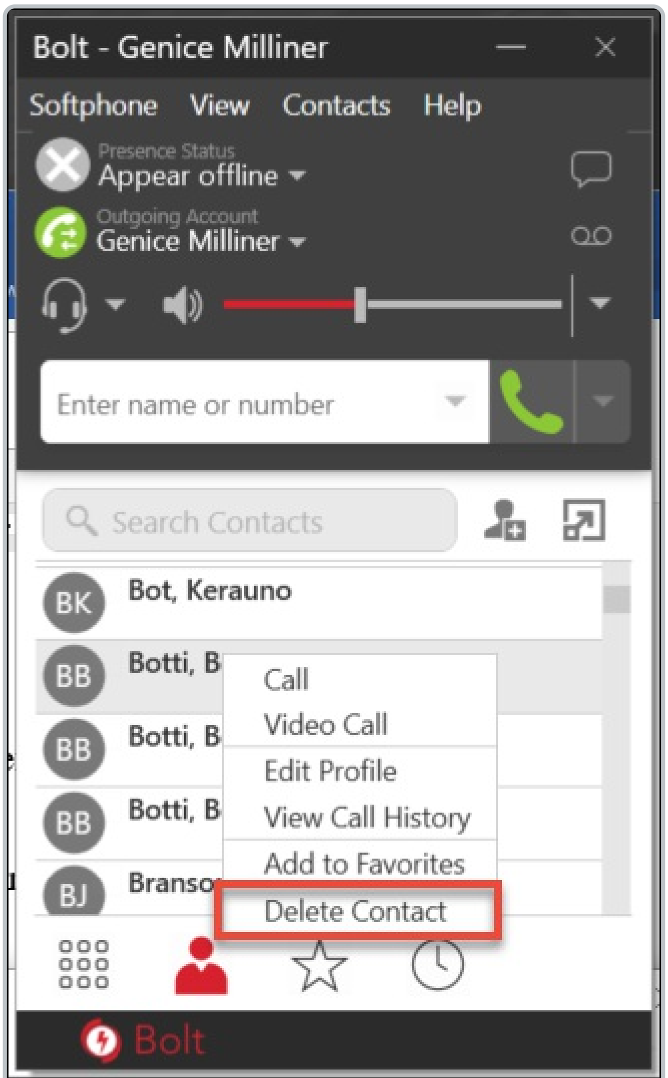


Figure 14 Delete Contact Menu Option

A confirmation message is displayed as illustrated in Figure 15 below.

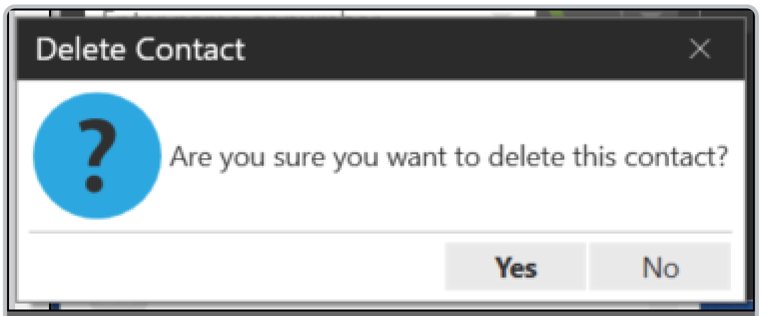


Figure 15 Delete Contact Confirmation Message

Select the **Yes** button to complete the deletion; select the **No** button to cancel the deletion and back out of the operation.

Export Contacts

To export contacts from Bolt, select **Contacts** from the main menu then **Export Contacts…** from the drop-down list as indicated in Figure 16 below.

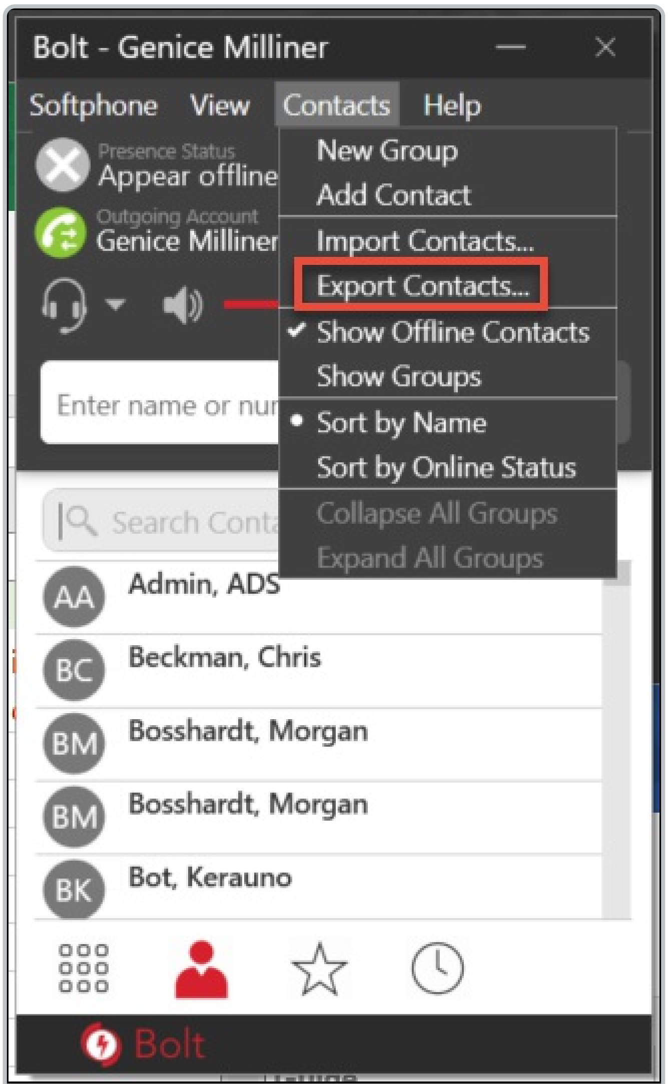


Figure 16 Export Contacts Menu Option

When the **Select the file format** pop-up is displayed (as illustrated in Figure 17 below) select the **Comma-separated values (*.csv file)** option then select the **Next>** button.

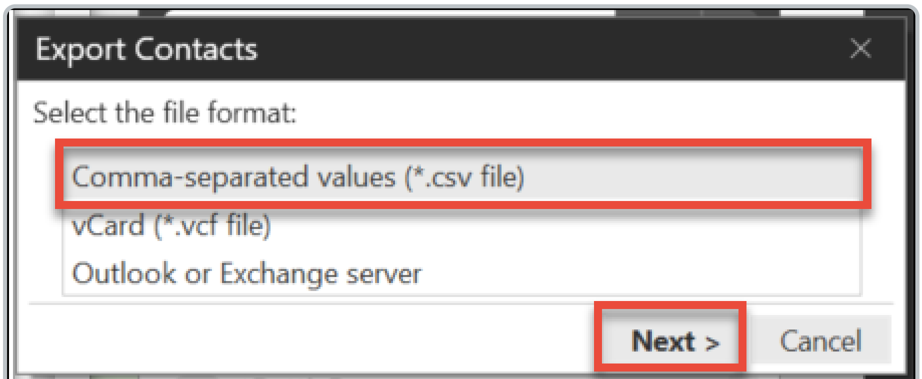


Figure 17 Select File Format Option

The **Select the location to export the contacts** pop-up is displayed. Enter the path and file name for the exported file or select the **Browse** button to navigate to the location and enter the file name as indicated in Figure 18 below.

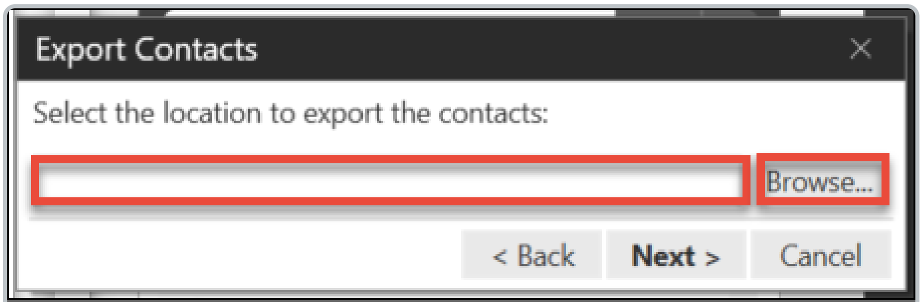


Figure 18 Select Export File Location

Select the **Next>** button to display the **Export successful** pop-up as indicated in Figure 19 below.

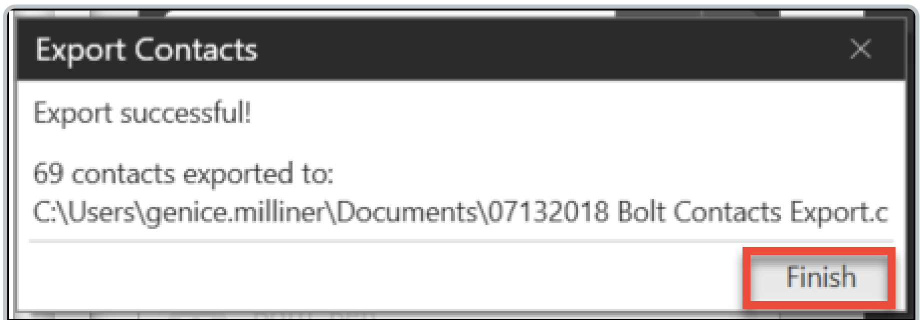


Figure 19 Export Successful Pop-up

Sorting Contacts

There are two (2) ways to sort contacts in Bolt: by name or by online status.

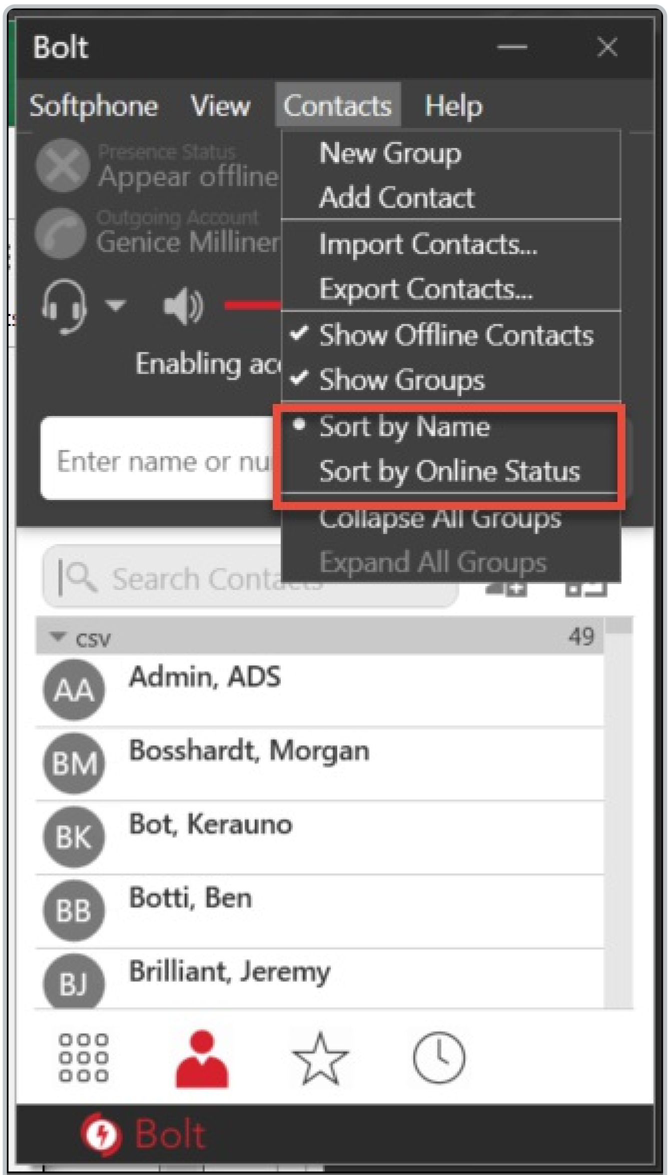


Figure 20 Sorting Contacts in Bolt

To sort contacts in Bolt by Name select **Contacts** from the main menu then select **Sort by Name** from the drop-down; select **Sort by Online Status** from the drop-down to sort contacts by their online status.

NOTE:	A dot to the left of a sort method indicates that it is the currently selected sort method.

Merging and Separating Calls in Bolt for Windows

Last Modified on 08/01/2018 8:08 am EDT

If multiple calls are received and all parties need to be conferenced together, Bolt provides a **Merge Call** option. A **Separate** call option is also available.

Merge Bolt Calls

NOTE:	To merge calls in Bolt you must have a minimum of three (3) active calls.

With the calls displayed, select the **More Options** button (...) as indicated in Figure 01 below.

Figure 01 Merge Calls Pop-Up Option

From the **More Options** pop-up select **Merge Calls**. This merges all active calls as indicated in Figure 02 below.

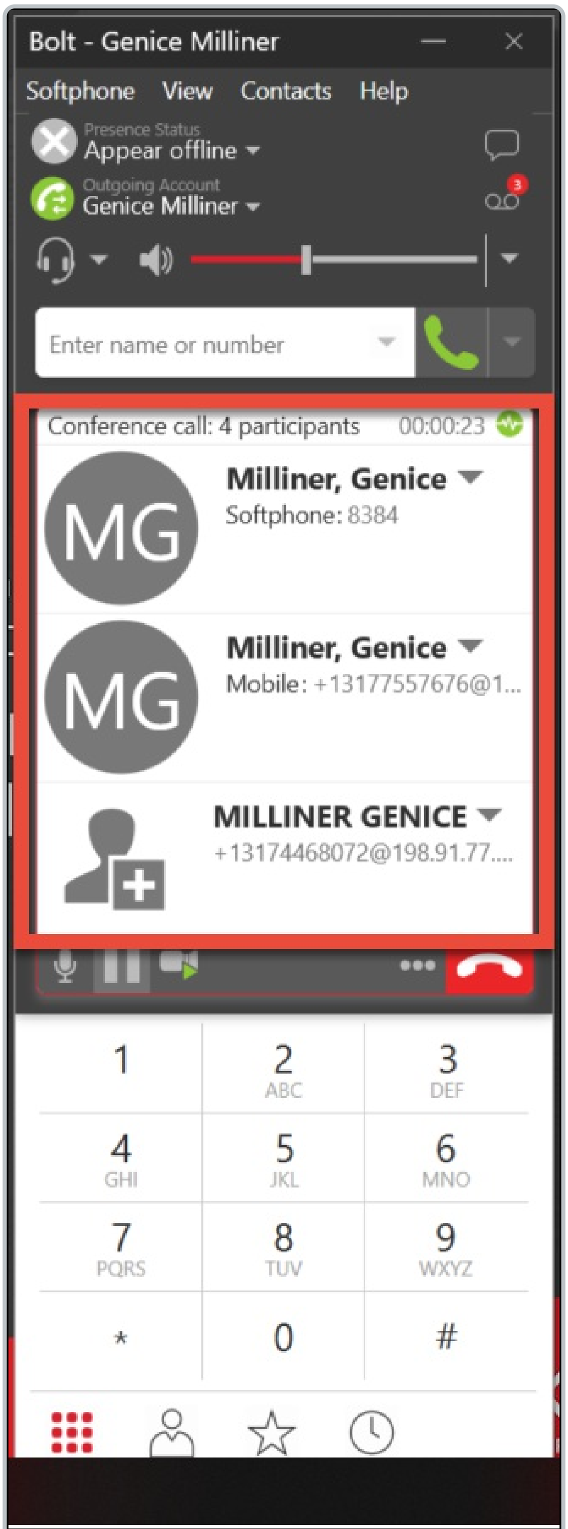


Figure 02 Merged Calls

Separate Bolt Merged Calls

Once calls have been merged, they can easily be separated.

NOTE:	Merged calls are separated one at a time.

To separate a call from merged calls, select the down arrow next to the call you want to separate as indicated in Figure 03 below.

Figure 03 Separate Calls Drop-Down Option

From the drop-down list, select **Separate** as indicated in Figure 03 above. This separates the selected call from the merged calls as illustrated in Figure 04 below.

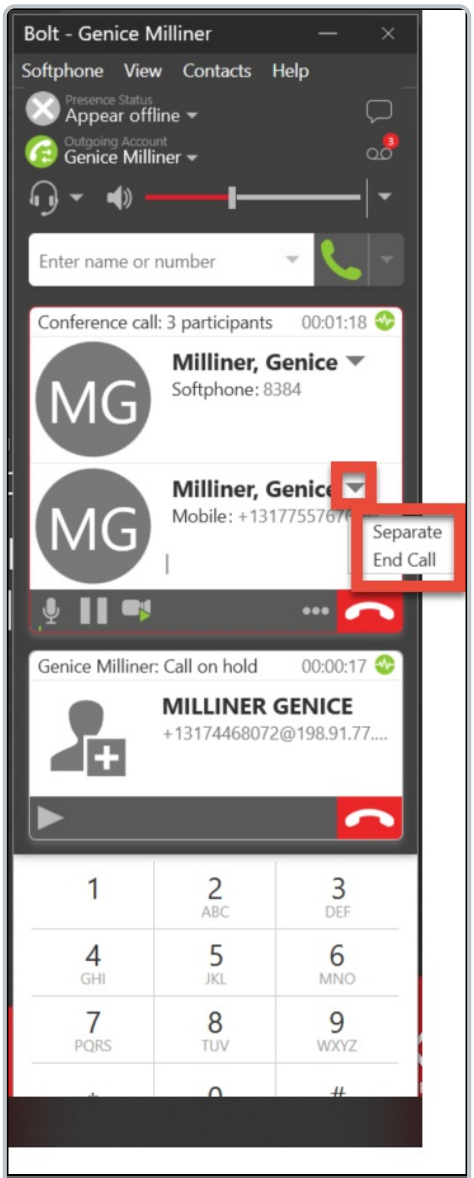


Figure 04 Separated Call

Each call can be separated in this manner. Select the red phone receiver to disconnect a call when finished.

Placing a Call with Bolt for Windows

Last Modified on 07/30/2018 8:59 am EDT

There are a variety of ways to make calls using Kerauno such as keying in the phone number, use letters to call a number, call anonymously (hide your identity), etc.

Place a Call

Place the call as described in the table below. The outgoing call opens in its own call panel, below any other existing call panels. You will hear a ringing tone while Bolt attempts to make a connection.

Option	From the...	Description
Keying	Dialpad or computer keyboard	1. Enter the phone number in the call entry field using the dialpad or the computer keyboard. If entering a softphone address, you can enter the entire address (6045551212@domainA.com) or just the number (6045551212). As you type, a suggestion for completing the entry may appear. Choose the suggestion by using the **Up/Down** key and the **Tab** key, or keep typing. 2. Bolt makes a call as soon as you choose the suggestion. If you do not want to choose a suggestion, finish typing and click the **Call** button or press **Enter**.

Right-click a contact or previous call	Contacts or History tab	Right-click an entry from the **Contacts** or **History** tab and choose **Call**.
Double-click a contact	Contacts tab	Contacts have a "double-click" action that makes an audio phone call.
Single-click a contact	Contacts tab	Hover over the right side of the contact to reveal the click-to-call button. Click to place a call using the primary phone number for this contact.
Double-click a previous call	History tab	Double-click an entry. An audio call is placed.
Redial	Redial button	1. When the call entry field is empty, click the **Call** button. 2. Click the arrow in the call entry field and select a recent call. An audio call is placed.
Dialing	Dialpad	1. If the dialpad is not visible, click the **Phone** button at the bottom. 2. Click the numbers on the dialpad to enter the phone number. 3. Click the **Call** button or press **Enter**.

Letters to Numbers

You can type letters and Bolt will convert the letters to numbers when placing the call.

Select the **Turn Letters To Numbers** option from the drop-down then enter the phone number using letters and numbers.

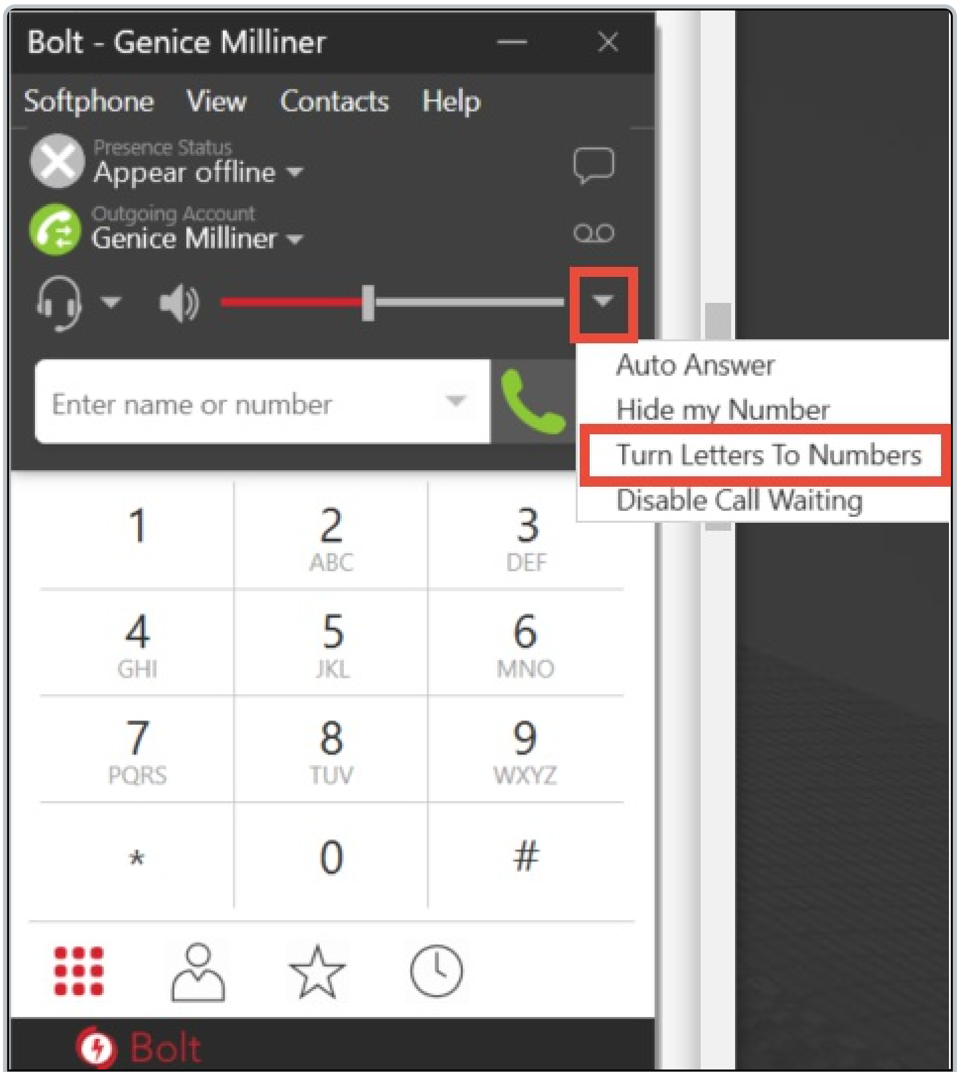


Figure 01 Turn Letters to Numbers

When you click the **Call** button the **Call Panel** will open and the call will be placed. The **Call Panel** will display the phone number in all numbers.

Annonymous Call

You can hide your identity on a call using the **Hide my Number** feature. The call recipient will not see your name or number on their phone. Your ID will be hidden for all outgoing calls until you turn off **Hide my Number**.

Turn Hide my Number on/off manually.

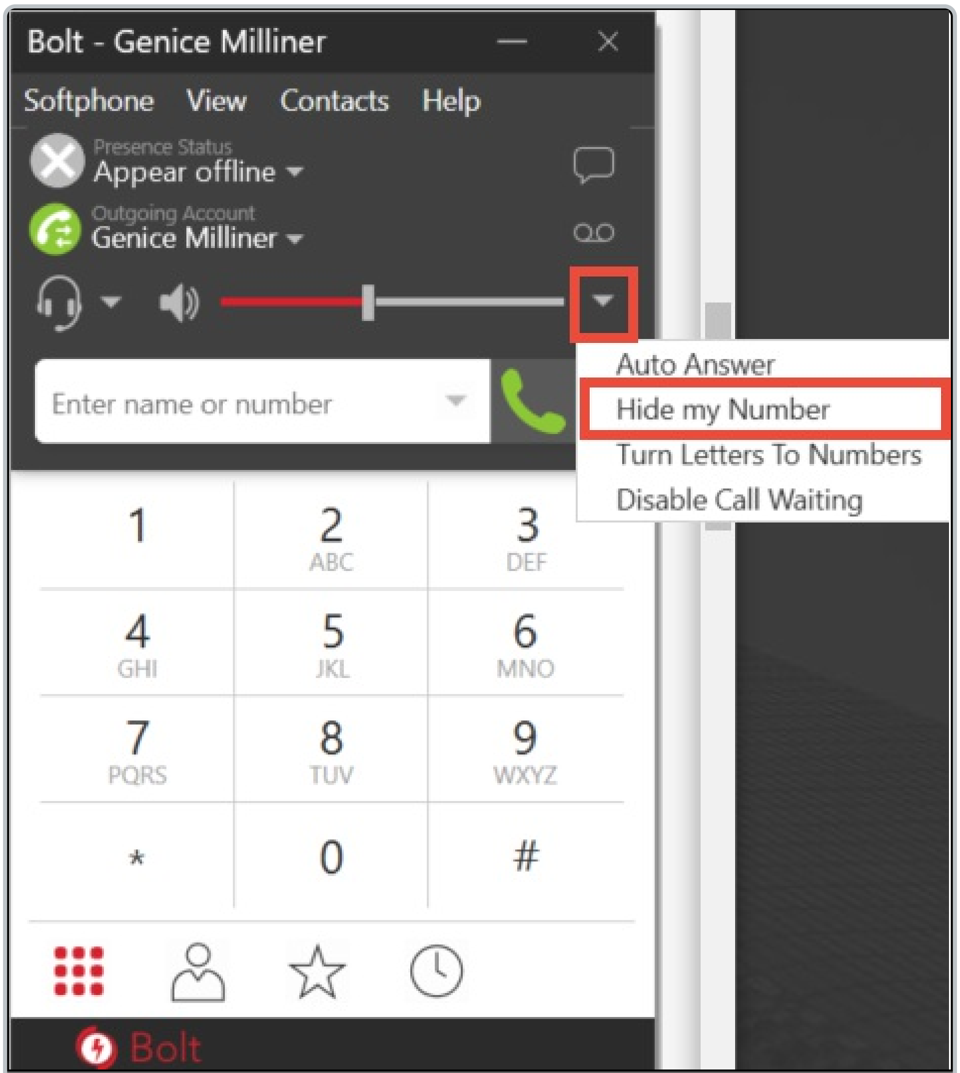


Figure 02 Hide my Number

Anonymous calling is automatically turned off when you shut down or log off.

Placing a Concurrent Call

Bolt is capable of handling up to five (5) concurrent calls although although eventually the quality of audio will degrade because of limitations on the computer. The audio quality is dependent upon computer limitations and line quality.

Place or accept the initial call in your usual manner. When you need to make a concurrent call, simply enter the phone number for the concurrent call and press the **Call** button.

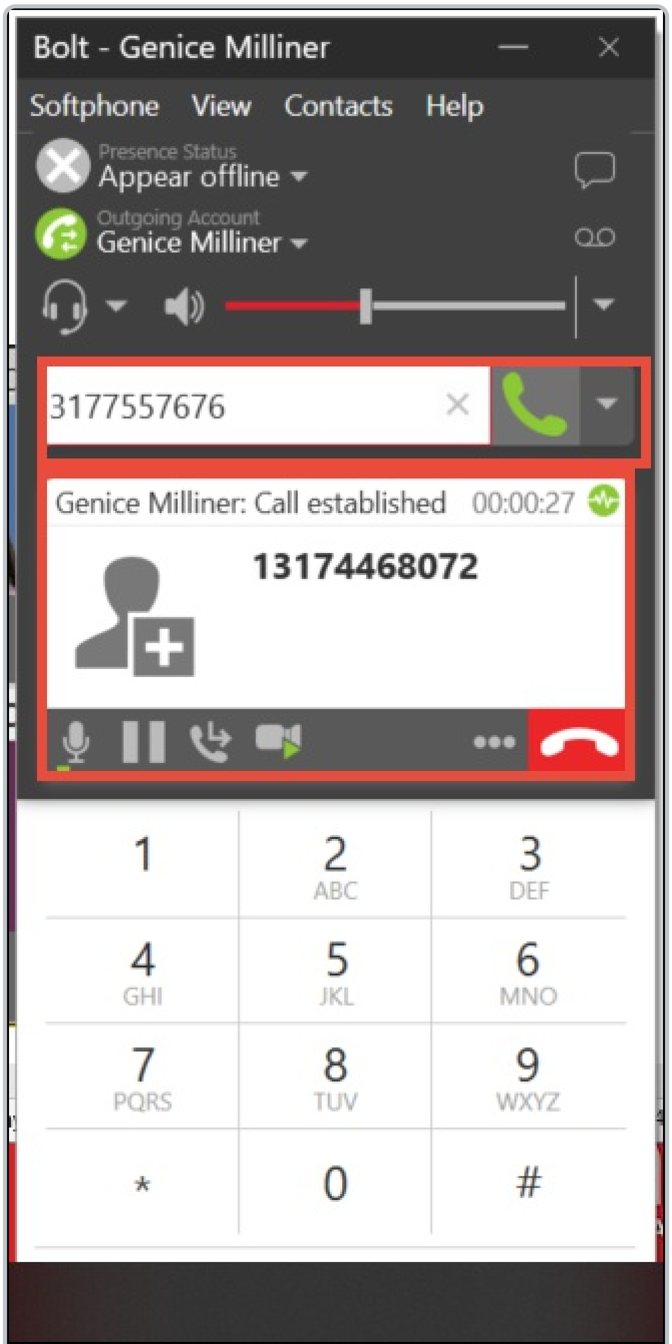


Figure 03 Make a Concurrent Call

When you press the **Call** button the original call you were on is put on hold and the new number is dialed.

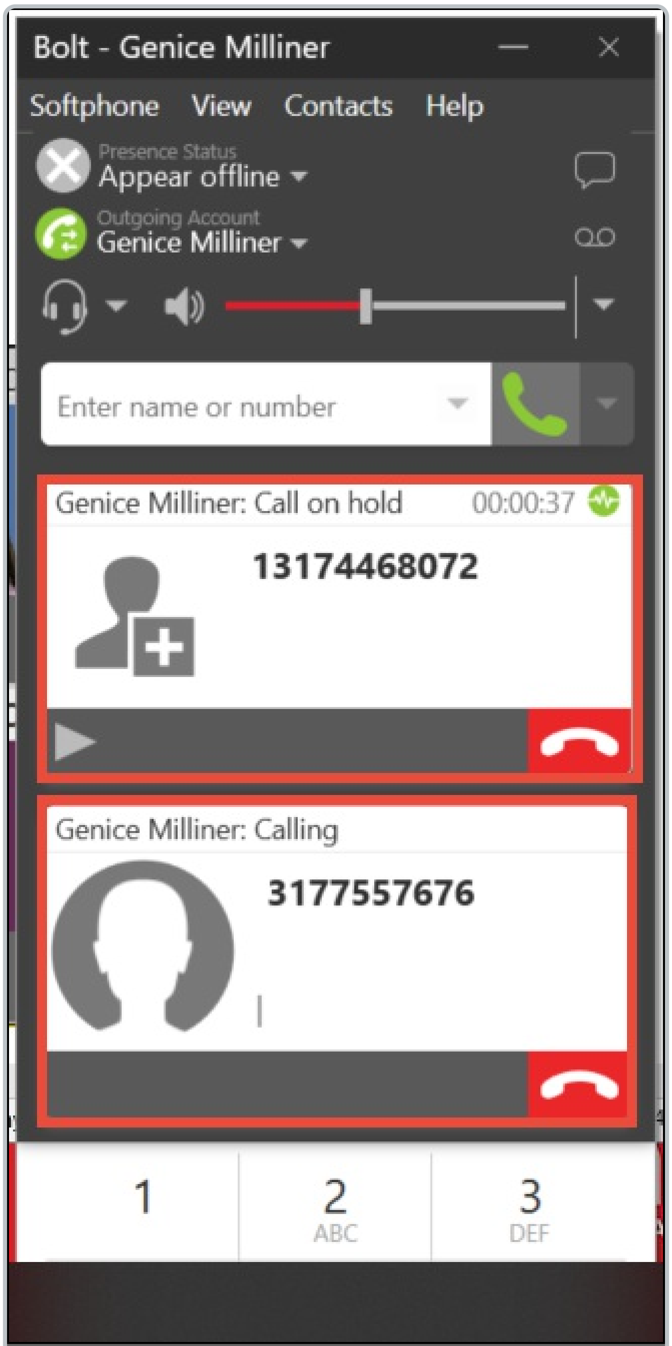


Figure 04 Concurrent Calls

Also, if you are on a call and another call comes in, accepting the new call puts the original call on hold.

Dealing with an Auto-Attendant

If you know that your call will be answered by an auto attendant and you know what menu items you will choose, you can include those menu items (DTMF) in the phone number when you dial it:

- Before the first DTMF number, include at least one capital P.

- You can include other Ps. Each P causes Bolt to wait one second before sending the next character.
- At the end of the input, you must include a semicolon (;) character.
  - Example: To dial a number, add a 3-second delay and then press 44, enter this in the call entry field: 6045551212PPP44.
  - Example: To dial a number, add a 6-second delay, then press 1 then 3 then 2, each with a two second delay: 6045551212PPPPPP1PP3PP2.
  - A capital X or comma (,) can be used instead of P; the following will work in the same way as the first example above: 6045551212XXX44.

Ending a Call

To end a call on Bolt, select the red phone receiver to hang up the call.

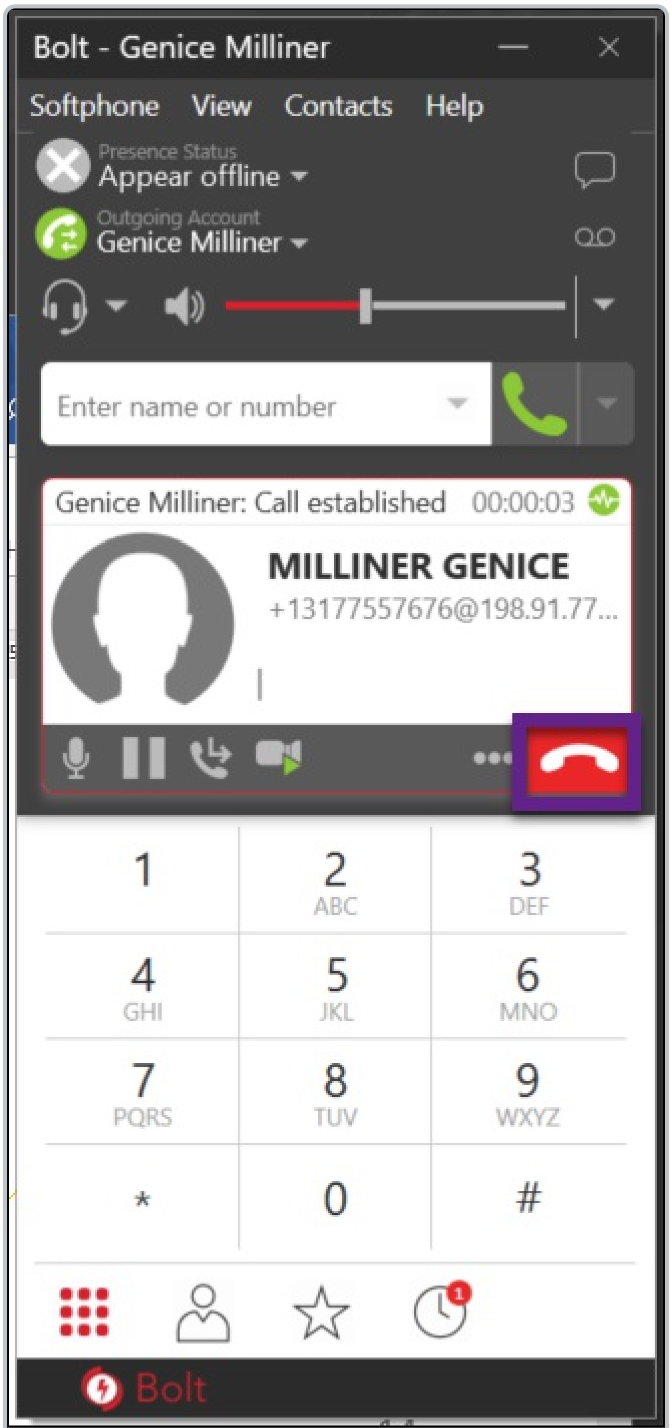


Figure 05 Bolt Ending a Call

Signing in and exiting Bolt for Windows

Last Modified on 08/01/2018 8:02 am EDT

This article discusses how to launch Bolt and exit Bolt.

Starting Bolt

Double-click the Bolt icon to launch the Bolt application. When the **Login** screen is displayed, enter your **User ID** and **Password**.

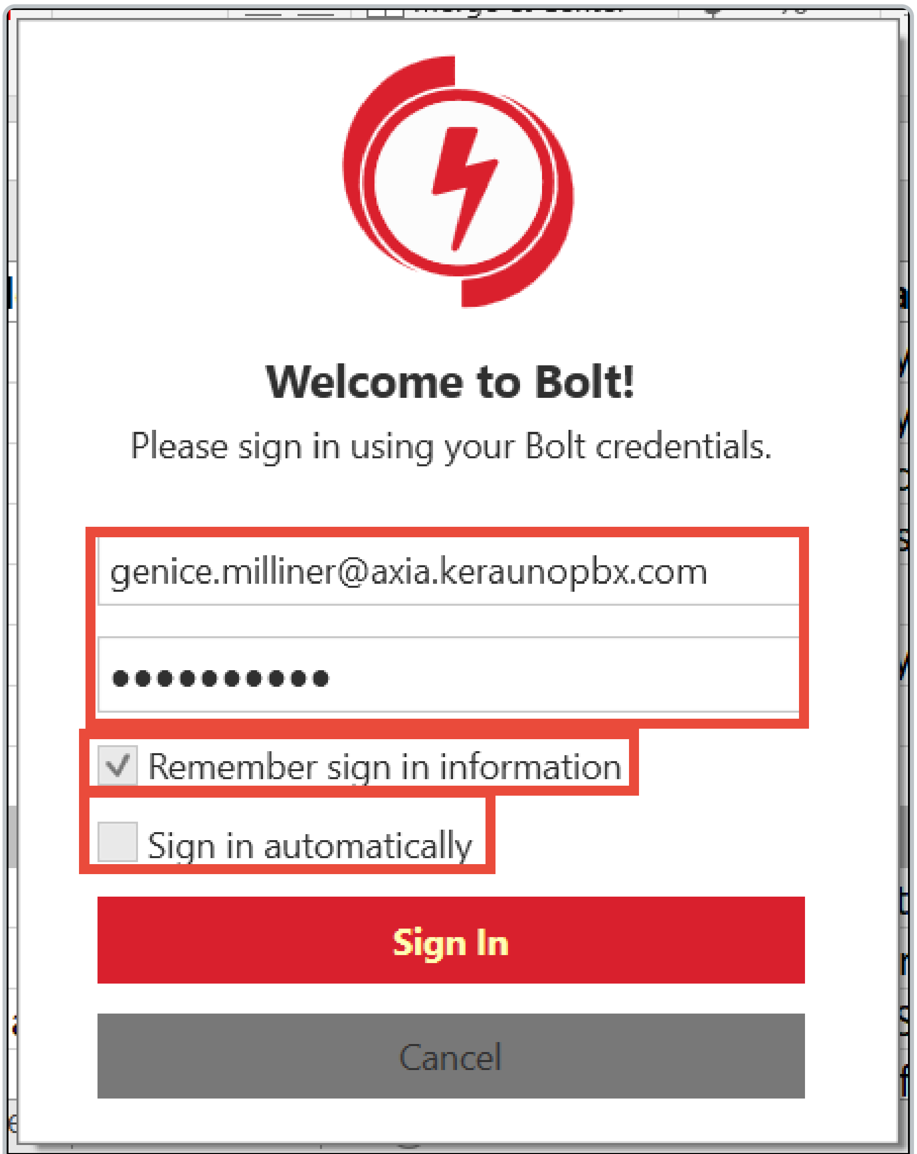


Figure 01 Bolt Login Screen

You can click the **Remember Sign in Information** checkbox to select/deselect it. Selecting this checkbox means the sytem will "remember" your **User ID** and

Password so you don't have to type them in each time.

Select the **Sign in Automatically** checkbox to skip the **Login** screen and automatically sign into Bolt when the application is launched.

Quitting Bolt

To quit Bolt, select **Softphone > Exit**, or press **Ctrl-Q**.

Testing Audio Devices in Bolt for Windows

Last Modified on 08/01/2018 8:06 am EDT

You can verify that your microphone and speakers are working and can set the volume to a comfortable level without having to actually place a phone call.

From the main menu, select **Softphone>Preferences** as illustrated in Figure 01 below.

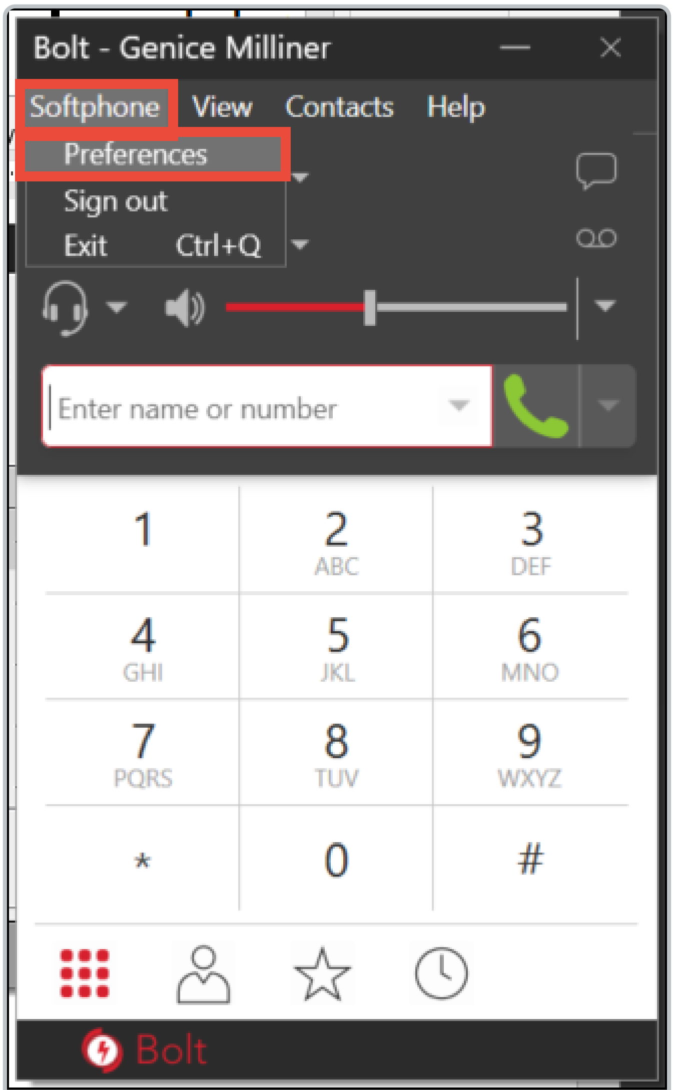


Figure 01 Preferences Menu Option

From the **Preferences** screen select **Devices** from the menu options on the left of the screen then select the **Test Devices** button as illustrated in Figure 02 below.

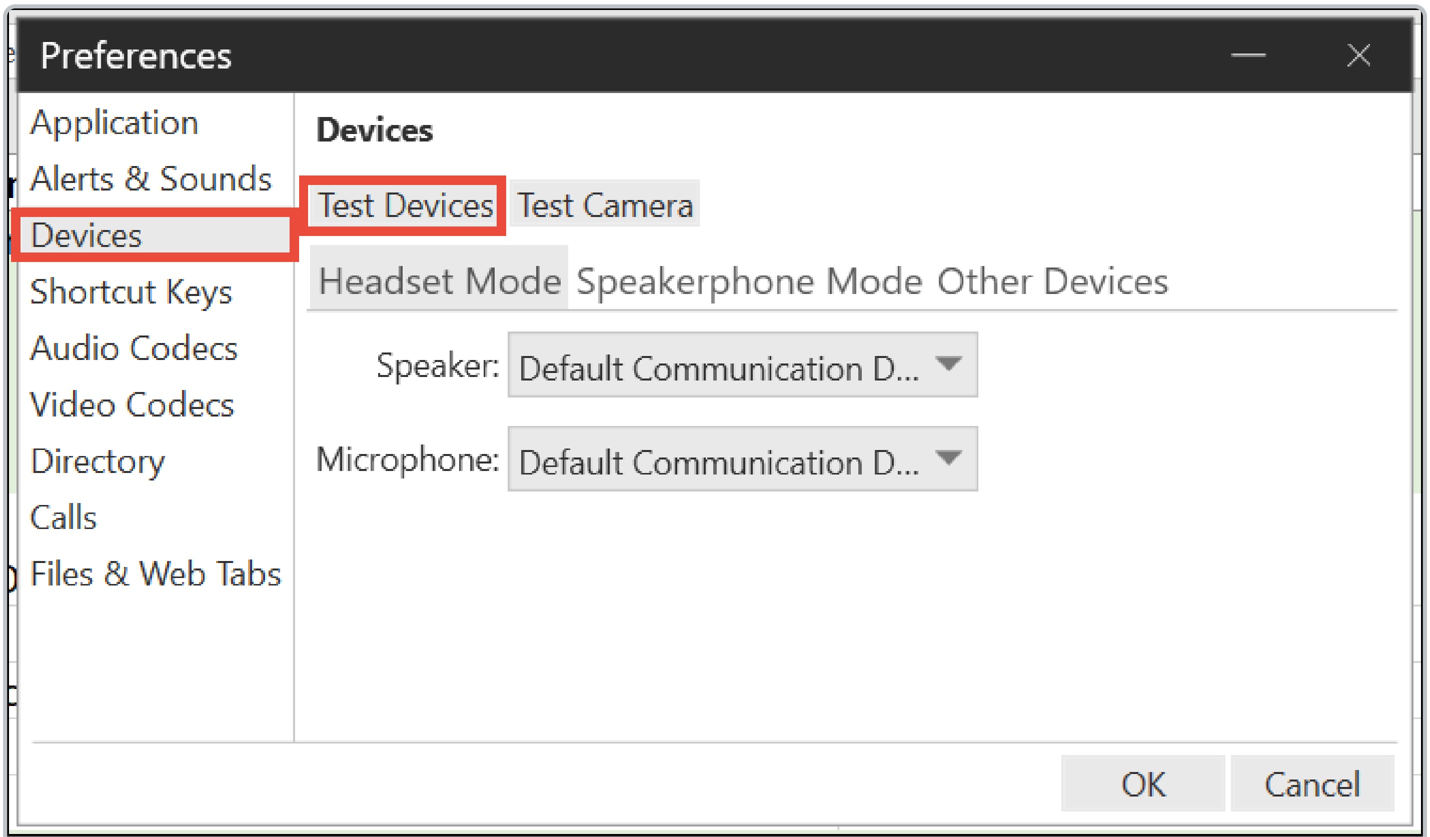


Figure 02 Devices Screen

The **Devices Troubleshooting** screen is displayed (refer to Figure 03 below):

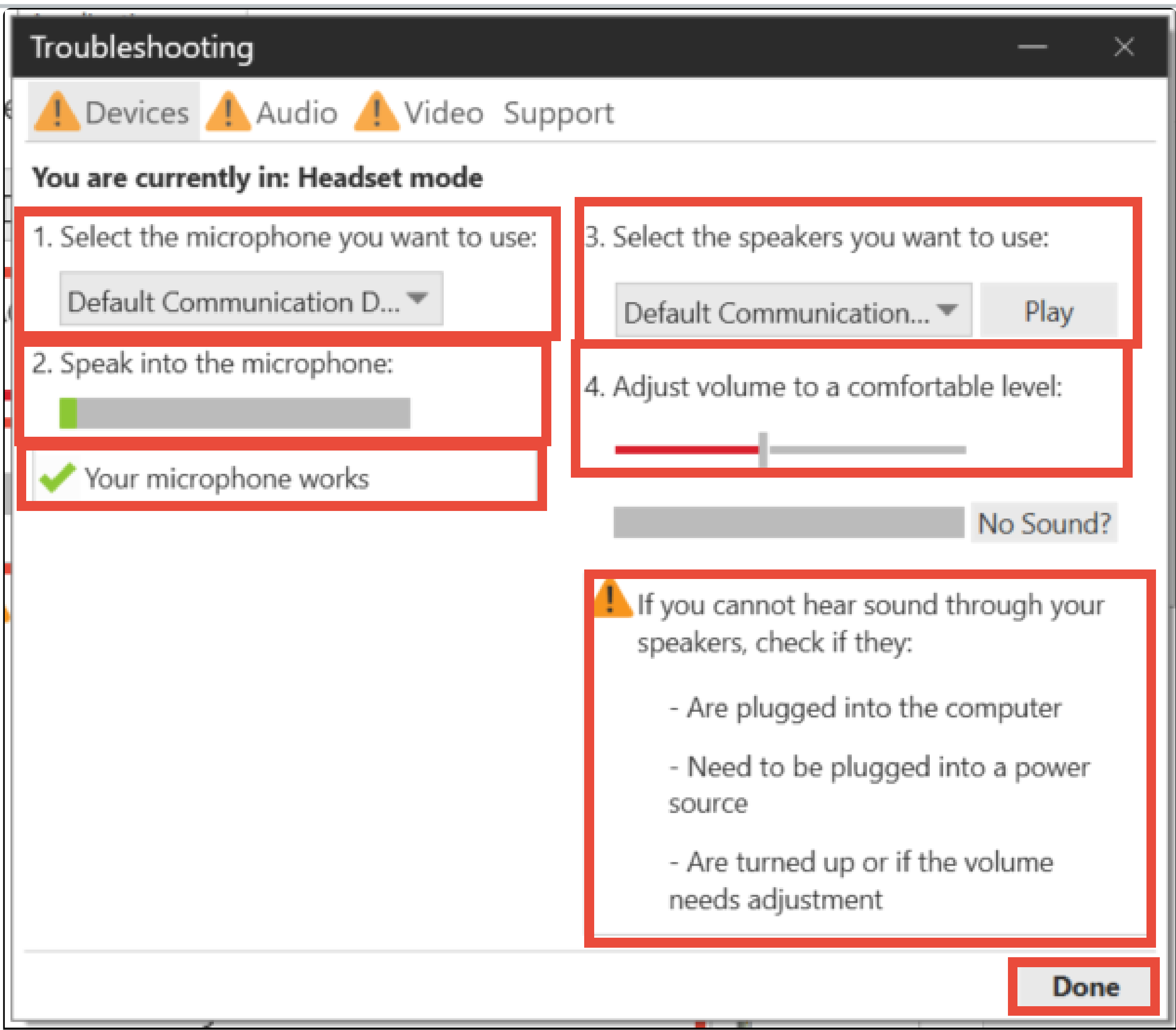


Figure 03 Devices Troubleshooting Screen

First, select the microphone you use from the drop-down list. Once selected, you can speak into the microphone to test it. The system displays a message to let you know the microphone is working.

Select the speakers, or headphones, you use from the drop-down; select the **Play** button to hear a sample so you know if the volume needs adjusted. Click and drag the slider in step 4. to adjust the volume level up or down.

There are troubleshooting tips in the lower-right of the screen. select the **Done** button at the bottom-right when you are finished with your adjustments.

User Status in Bolt for Windows

Last Modified on 08/01/2018 8:07 am EDT

In Bolt, you can set your user status to inform other users of your availability.

NOTE:	The status in Bolt is not currently synchronized with your Presence status. This is on the development roadmap.

To change your status in Bolt, under **Presence Status**, select the down arrow to the right of the current status. When the drop-down list of statuses is displayed, select the status you want to display.

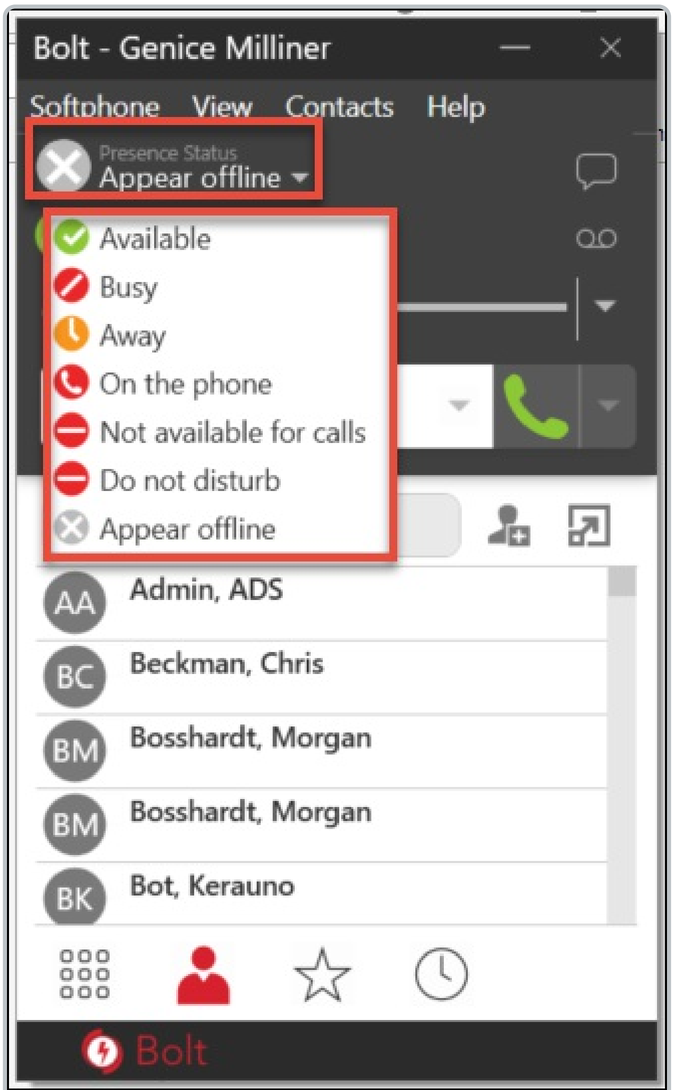


Figure 01 Bolt User Status

NOTE:	Currently, synchronizing user status in Bolt and Presence is a manual process; the user needs to ensure statuses match. Having the Presence status and the Bolt status automatically synchronize is on the development roadmap.

Working With Auto Answer in Bolt for Windows

Last Modified on 08/01/2018 8:08 am EDT

Auto Answer is initially configured to automatically answer calls after one ring and to send only your audio when the call is established.

Auto Answer Preferences

To change your auto answer settings select **Softphone** from the main menu then go to **Preferences>Calls**.

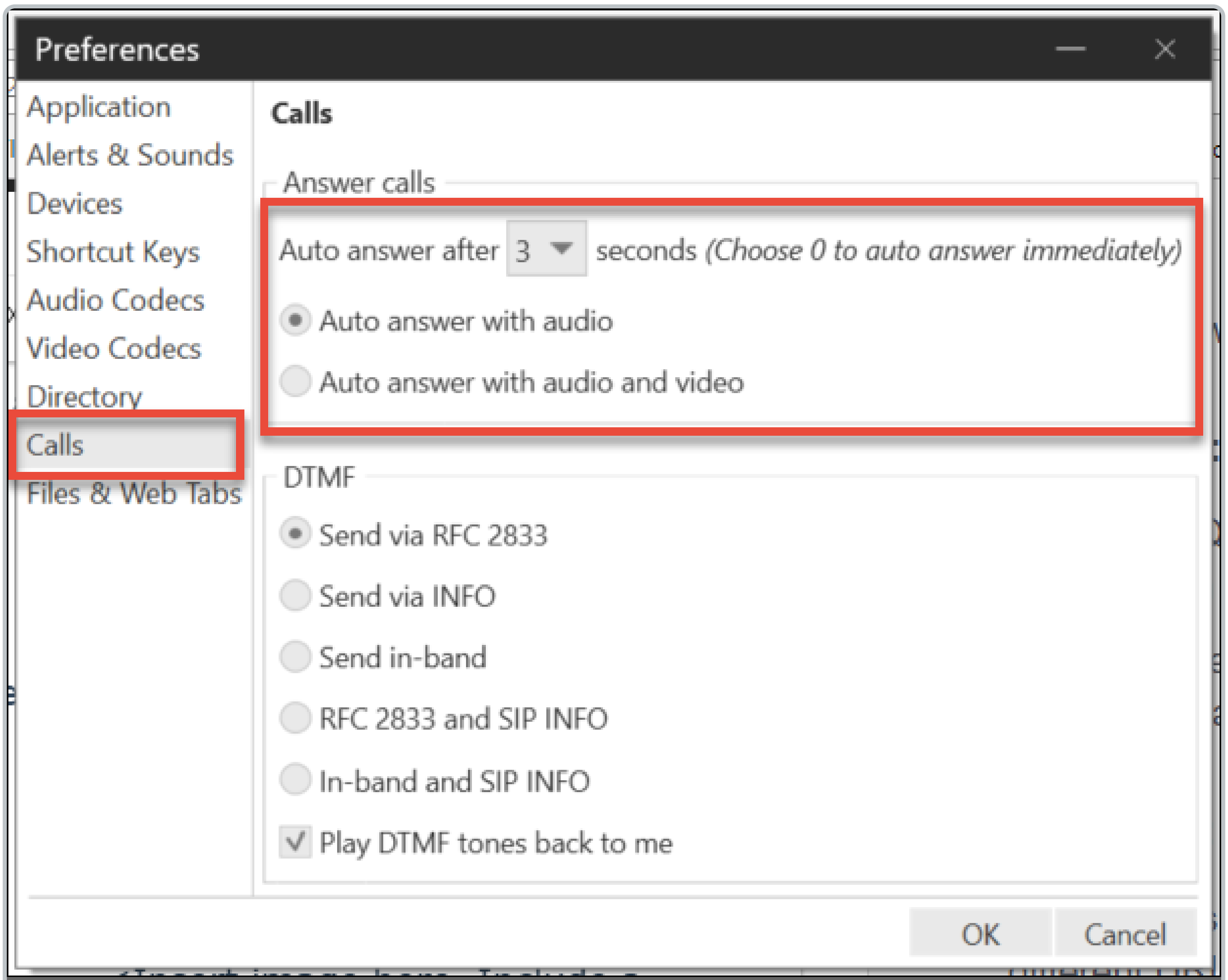


Figure 01 Bolt Auto Answer Preferences

On the **Calls** screen you can set the number of seconds after which the system will automatically answer a call. This drop-down allows you to set this number between 0 to 5. You can also set a preference to automatically answer with audio only or with audio and video.

Once you have your preferences set, select the **OK** button in the lower-right of the screen.

Turn Auto Answer On or Off

To turn auto answer on or off, select the down-arrow to the right of the volume slider then click the **Auto Answer** option to turn it on or off; a checkmark indicates that the option is on.

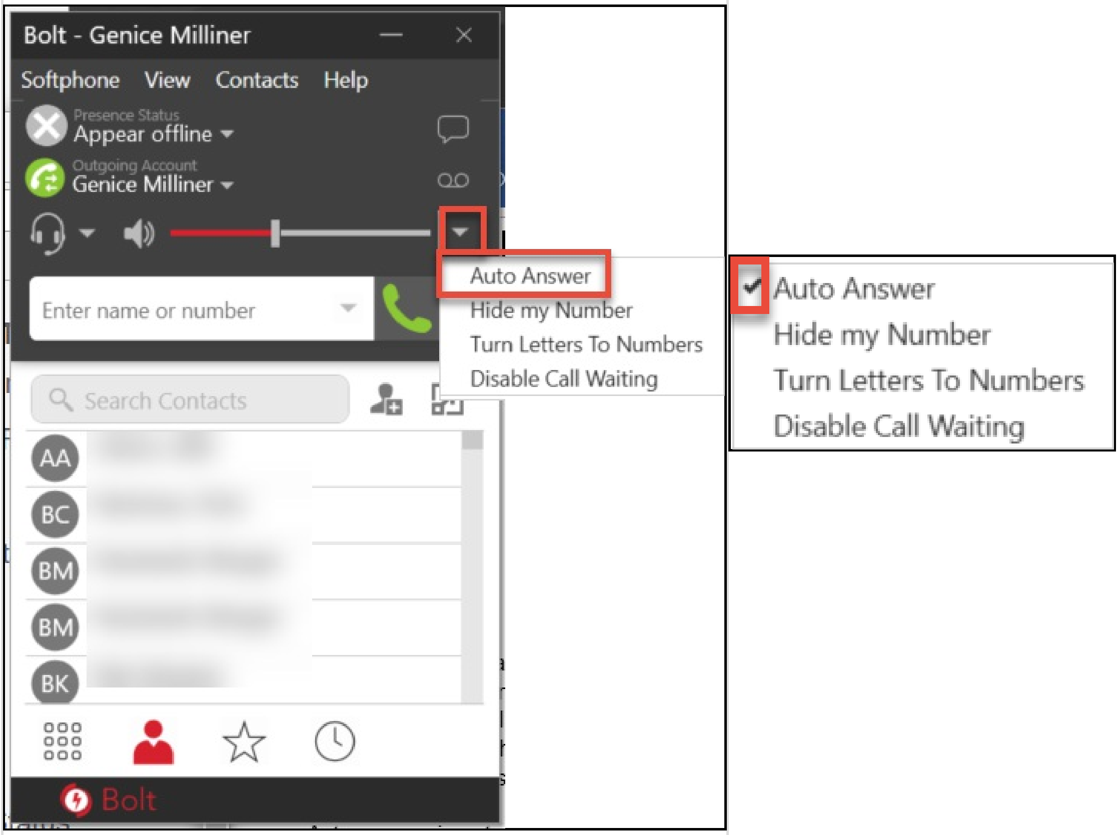


Figure 02 Auto Answer Off/On

Create a New Contact Group in Bolt for Windows

Last Modified on 08/01/2018 8:09 am EDT

You can easily create new groups to help manage your contacts in Bolt.

Select **Contacts** from the main menu then select **New Group** from the drop-down as illustrated in Figure 01 below.

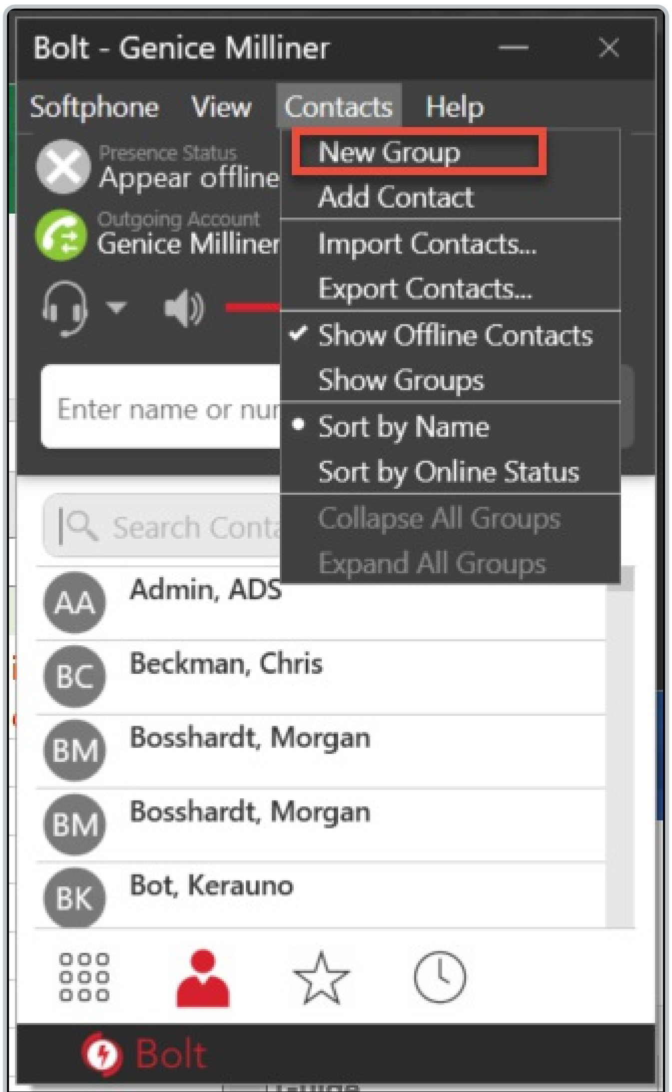


Figure 01 Create New Bolt Contact Group

This displays the **New Group** pop-up box as illustrated in Figure 02 below.

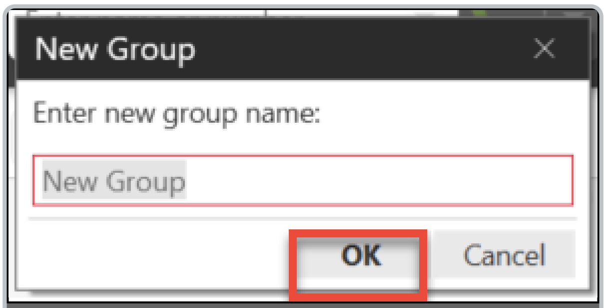


Figure 02 Bolt New Group Pop-Up

Enter a name for the new group then select the **OK** button. The new group is added and you are returned to your Bolt screen.

Rename a Contact Group in Bolt for Windows

Last Modified on 08/01/2018 8:10 am EDT

Bolt offers an easy way to change the name of an existing contact group.

Right-click the contact group you want to rename then select Rename Group from the pop-up menu as illustrated in Figure 01 below.

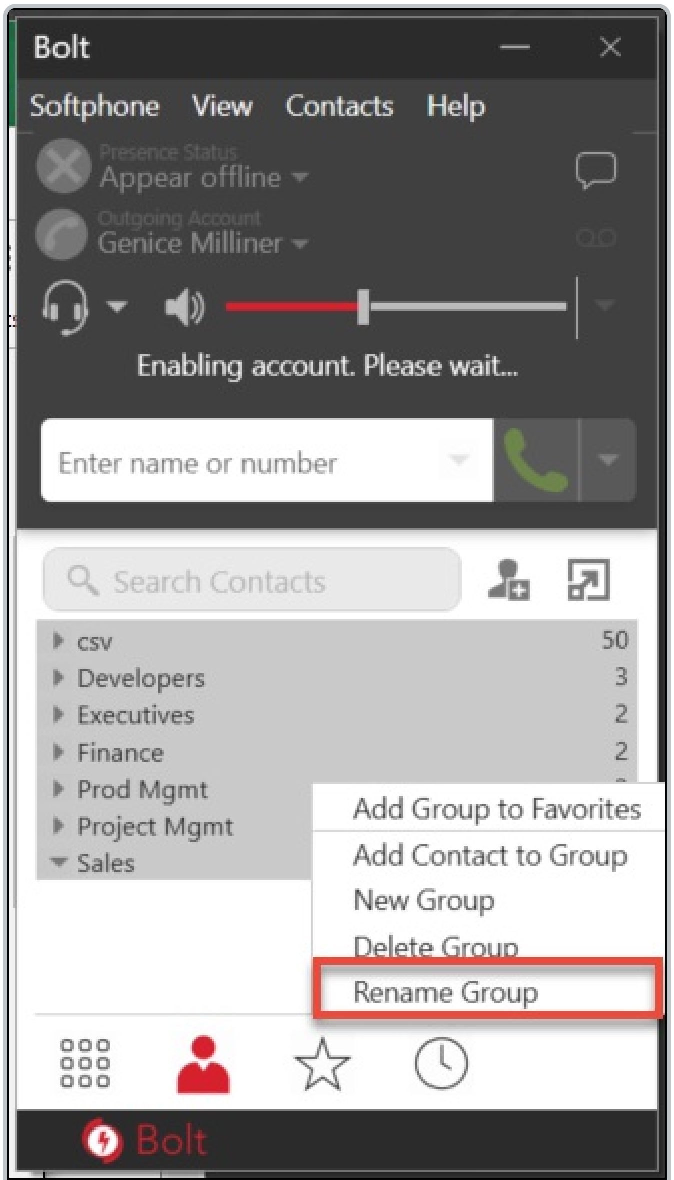


Figure 01 Select Rename Group from Drop-Down

When the **Rename Group** pop-up is displayed enter the new/updated name for the group and select the **OK** button. The name of the contact group now displays the updated name.

Show Contact Groups in Bolt for Windows

Last Modified on 08/01/2018 8:11 am EDT

Instead of viewing your Bolt contacts as one long list of names you can easily view your contacts by the groups they are assigned to.

From the main menu, select **Contacts** then select **Show Groups** from the drop-down as indicated in Figure 01 below.

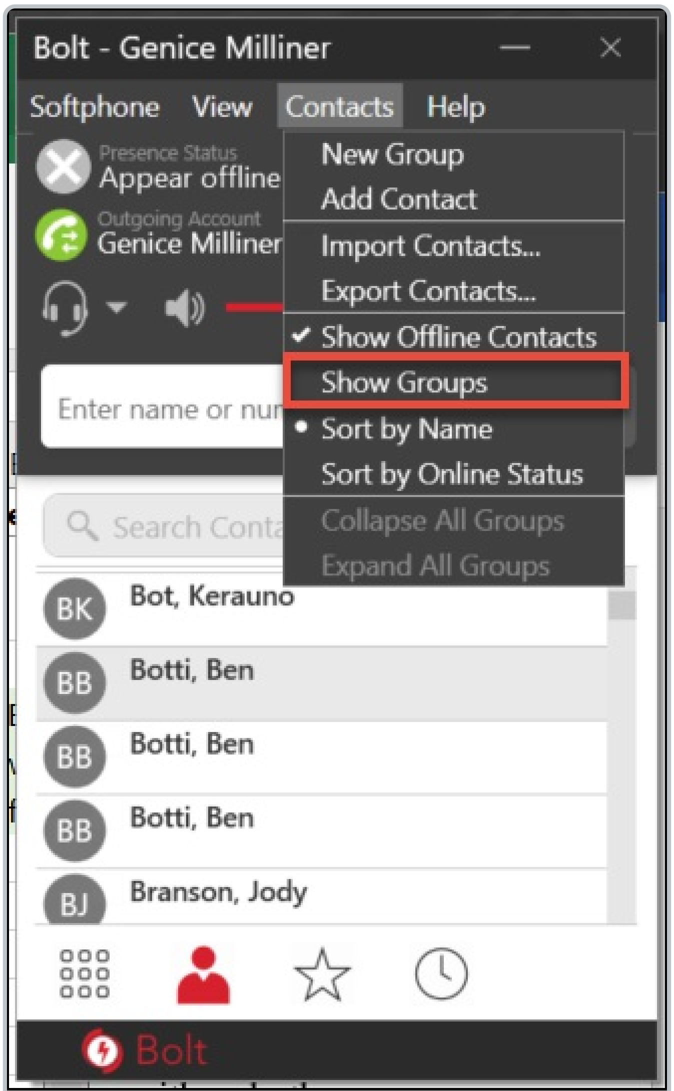


Figure 01 Show Groups Menu Option

Bolt now displays contacts by the groups they are assigned to; the list is collapsed by default (refer to Figure 02 below).

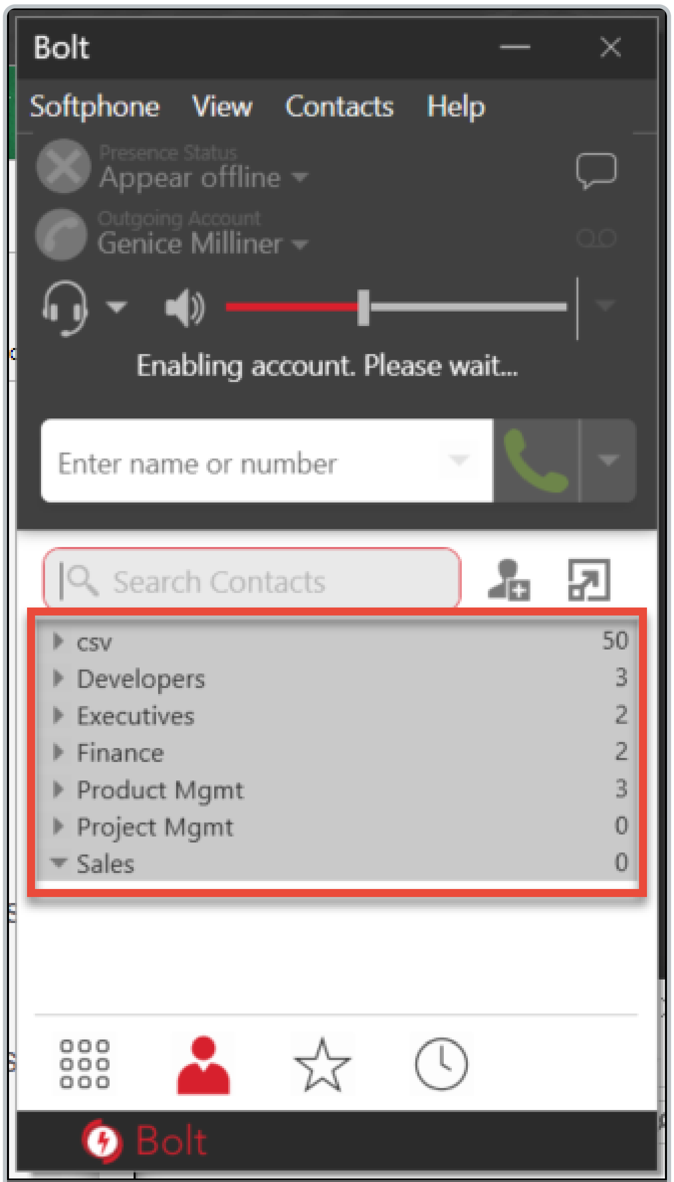


Figure 02 Collapsed Bolt Contact Groups

Collapse All Contact Groups in Bolt for Windows

Last Modified on 08/01/2018 8:11 am EDT

You can easily expand or collapse your group view to show the members of your Bolt Contact Groups.

If your groups are expanded (refer to Figure 01 below) you can collapse them all to make it easier to find a specific contact or group of contacts.

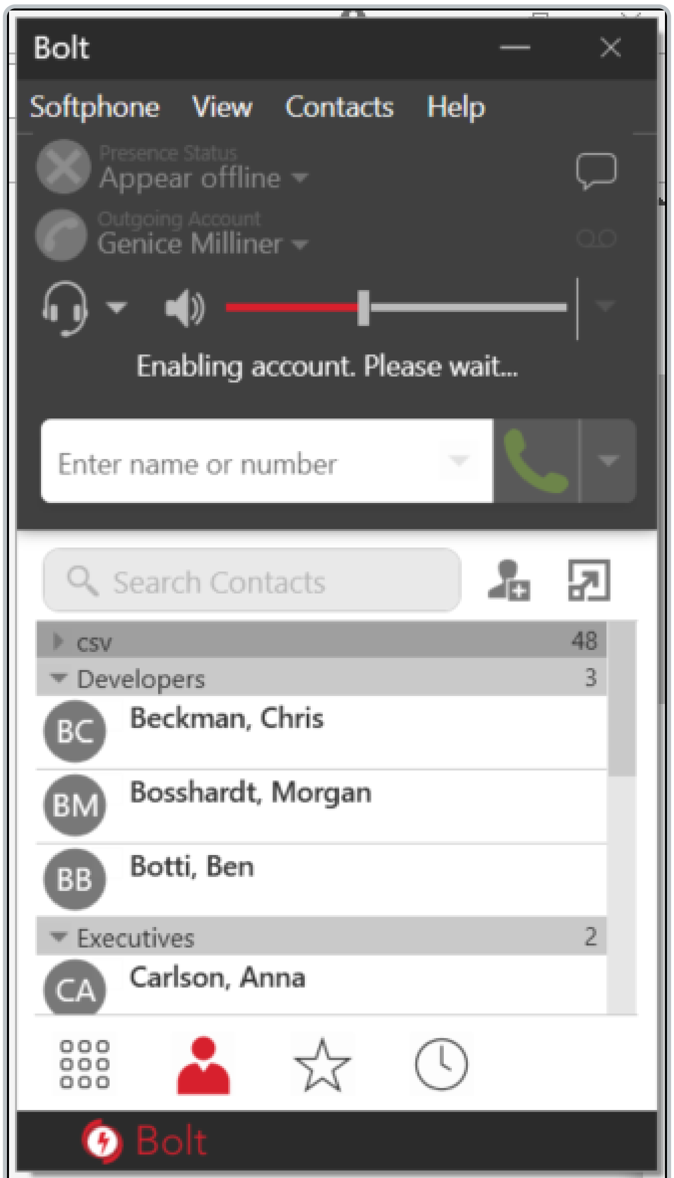


Figure 01 Expanded Bolt Contact Groups

To collapse the groups and make the contact information easier to see, select **Contacts** from the main menu. Then select **Collapse All Groups** from the drop-down as illustrated in Figure 02 below.

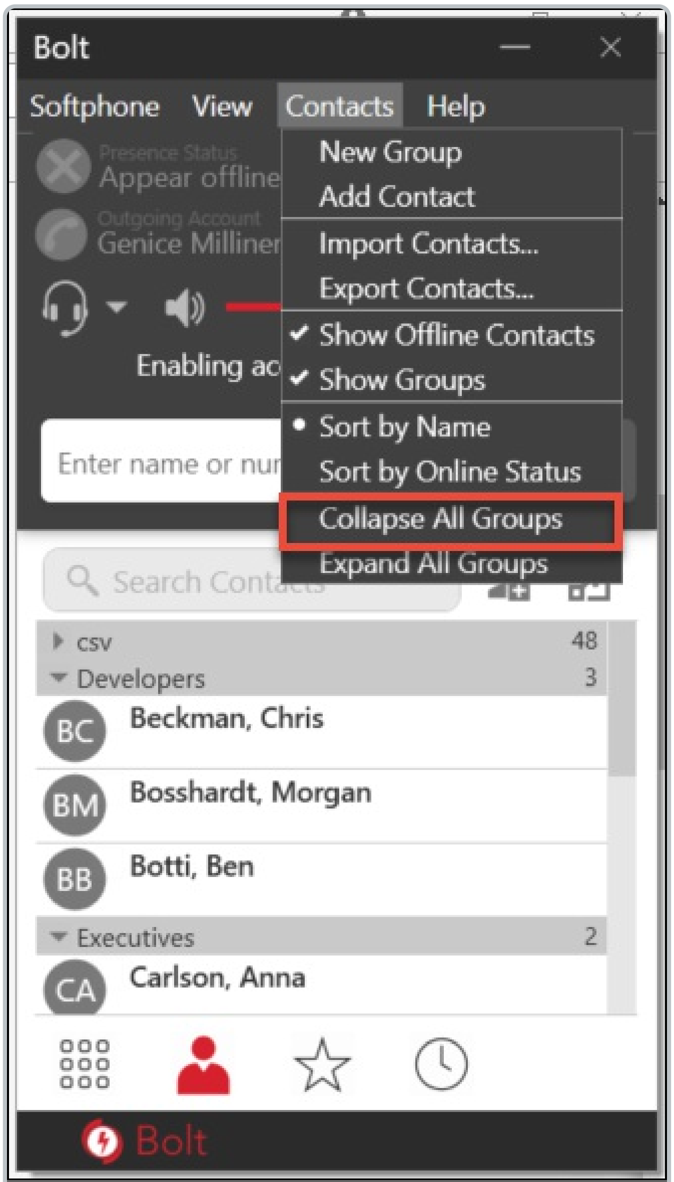


Figure 02 Collapse All Groups

All groups are collapsed, making it easier to see and select individual groups, and contacts (as illustrated in Figure 03 below).

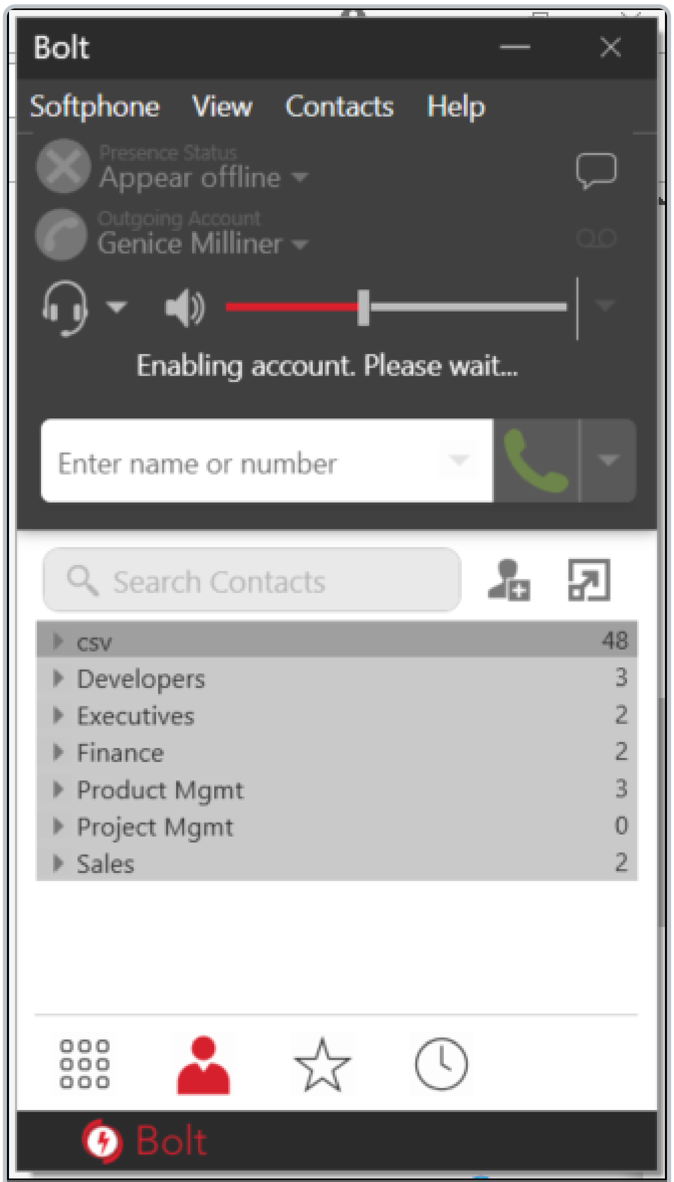


Figure 03 All Groups Collapsed

Expand Specific Contact Groups in Bolt for Windows

Last Modified on 08/01/2018 8:12 am EDT

Contact Groups in Bolt can be expanded individually, as multiples, or all as needed for easy viewing.

To expand an individual contact group select the arrow to the left of the contact group as illustrated in Figure 01 below.

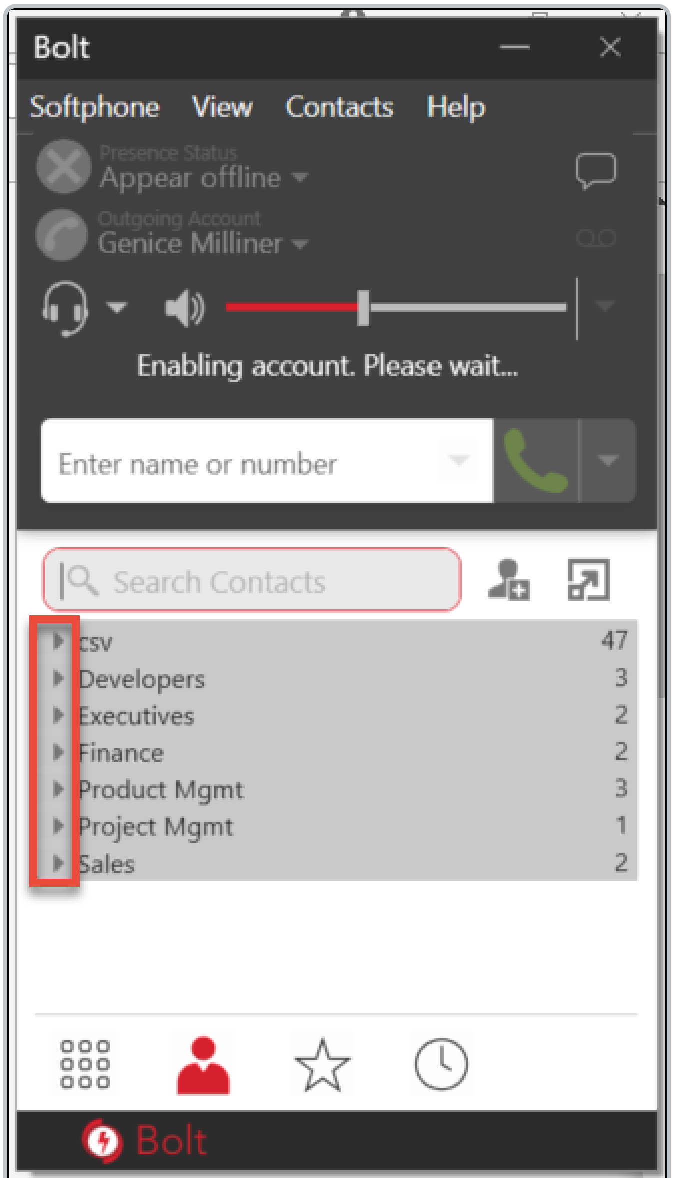


Figure 01 Expansion Arrows on Collapsed Groups

The selected arrow will change to a downward pointing arrow and open the selected group as illustrated in Figure 02 below.

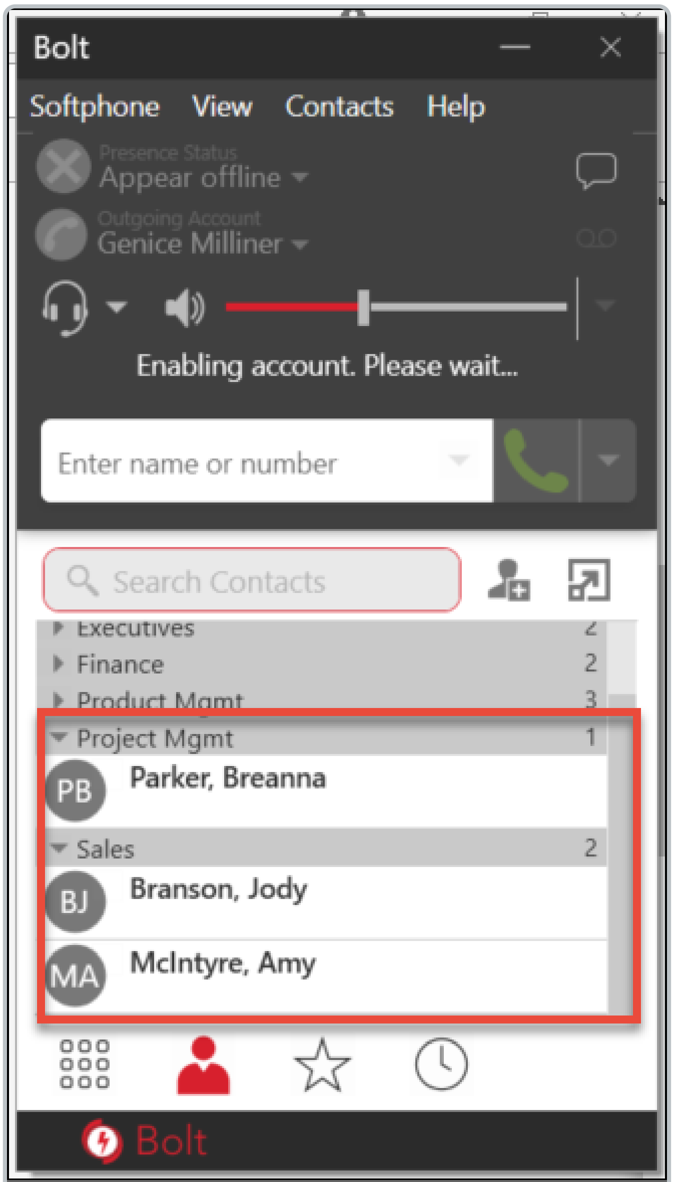


Figure 02 Individual Groups Displayed

Expand All Contact Groups in Bolt for Windows

Last Modified on 08/01/2018 8:13 am EDT

For times when you want to expand and view all contact groups, Bolt allows for that.

To expand all contact groups, select Contacts from the main menu then select Expand All Groups from the drop-down as illustrated in Figure 01 below.

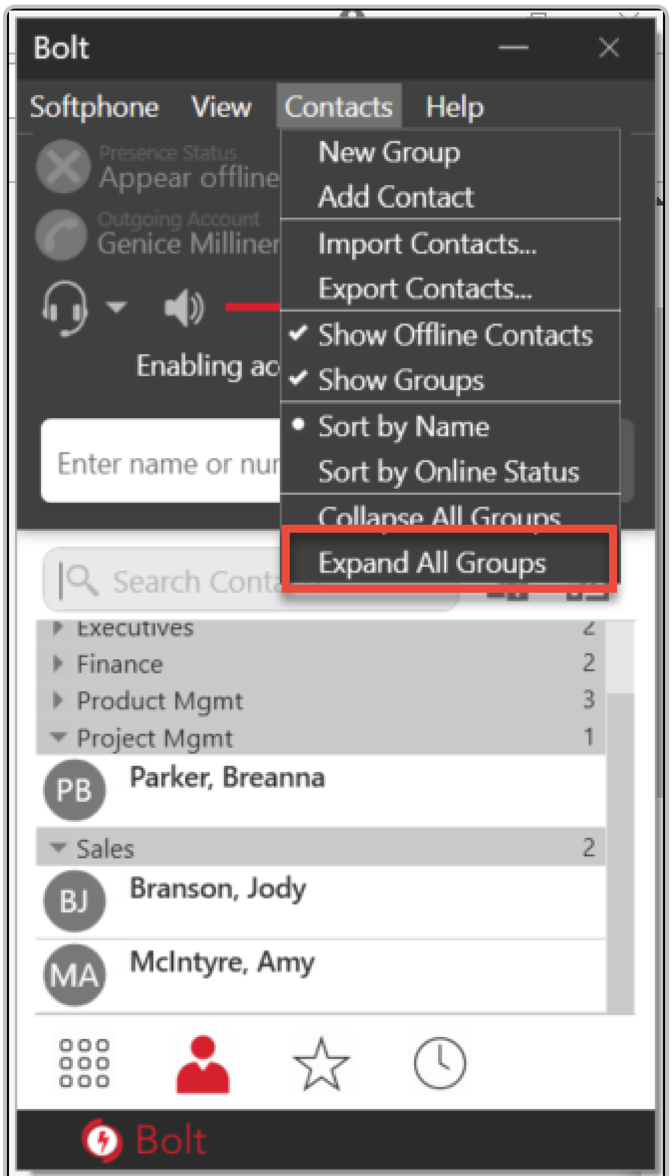


Figure 01 Expand All Groups Drop-Down Option

Bolt now displays all contact groups (and assigned contacts) as illustrated in Figure 02 below.

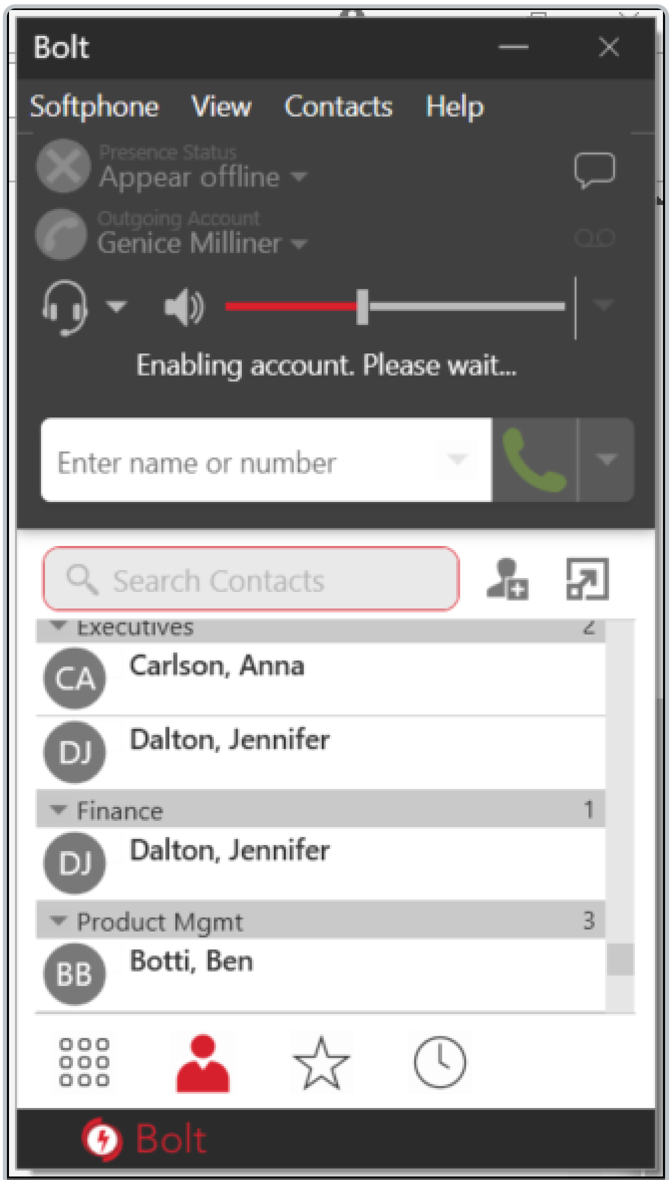


Figure 02 All Groups Displayed

Delete a Contact Group in Bolt for Windows

Last Modified on 08/01/2018 8:13 am EDT

For times when a group needs to be deleted (e.g., a group was added unintentionally), Bolt makes it easy to remove.

To remove a contact group from Bolt, select the group you want to delete then right-click the selected group to display a short-cut menu as illustrated in Figure 01 below.

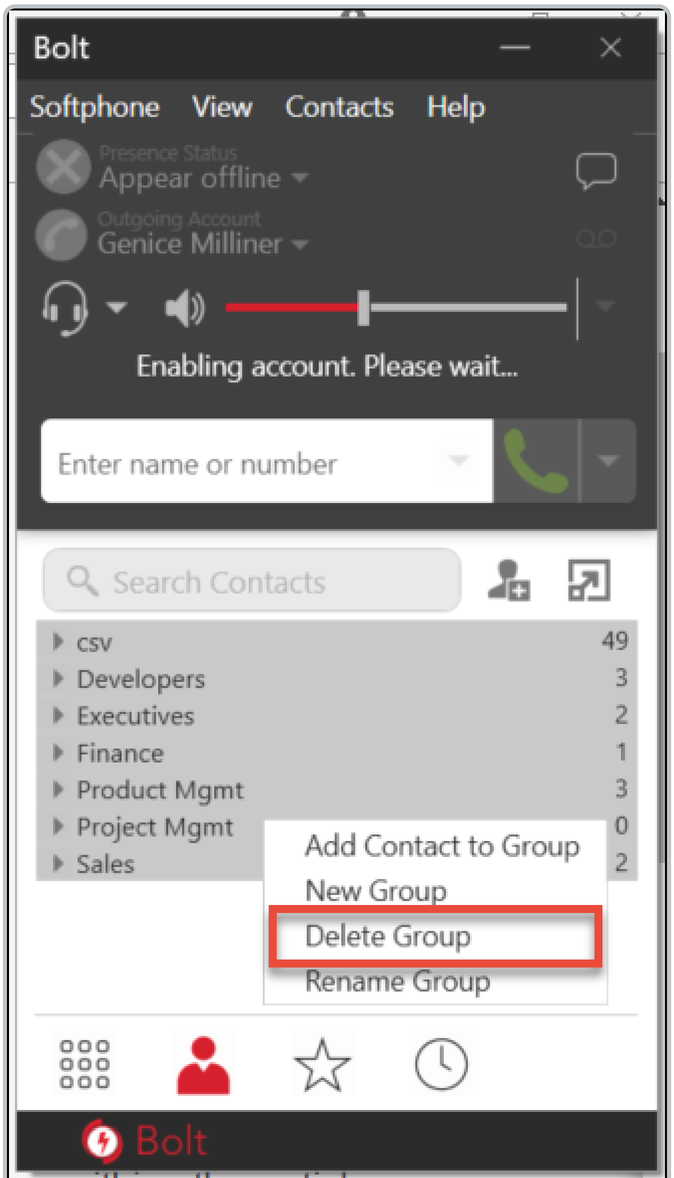


Figure 01 Short-Cut Menu with Delete Option

The selected group is removed from the list.

NOTE:	If any contacts are in the group when it is deleted, all contacts in the group are also deleted.

Bolt Android Devices Call History

Last Modified on 08/08/2018 8:13 am EDT

You can use the **Call History** screen to view information about calls made and received via Bolt for Android.

NOTE:	Bolt call history is local to that instance of Bolt. Kerauno will contain the call history for the user across all devices. Deleting a call record in Bolt will not delete the record in Kerauno.

Select the **Call History** button at the bottom of the screen as indicated in Figure 01 below.

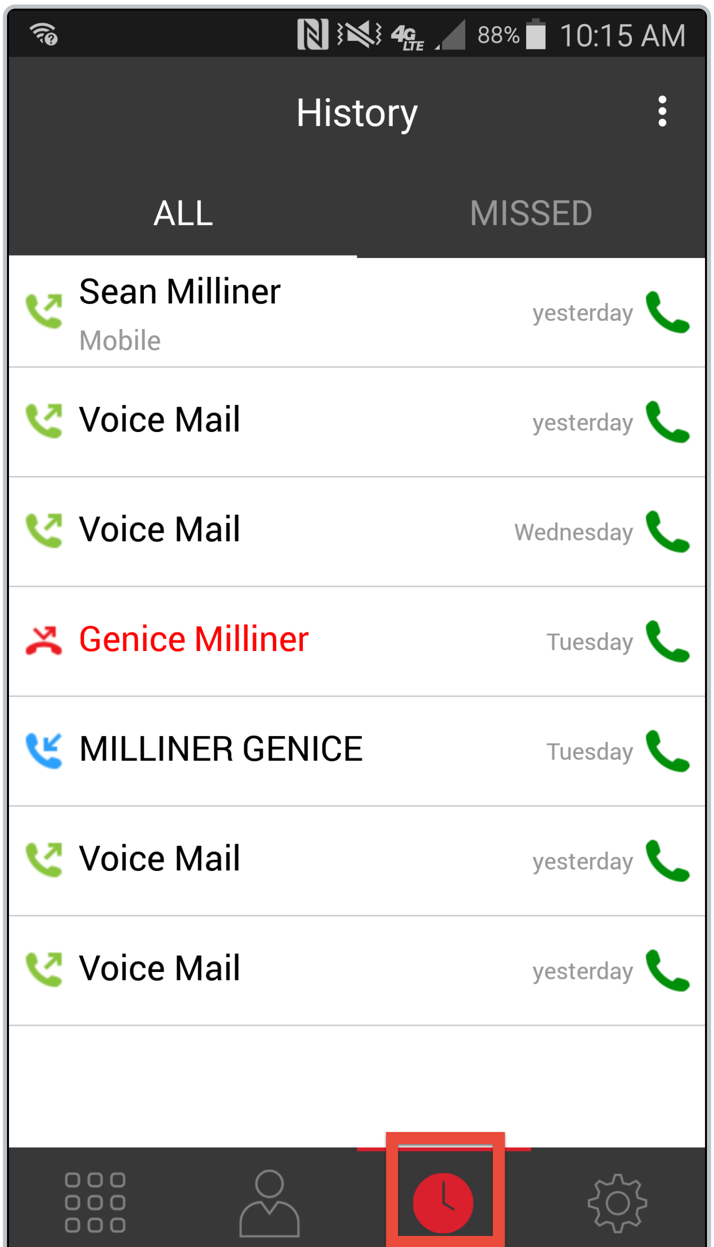


Figure 01 Bolt Android Call History Screen

This screen lists recent calls made and received as well as providing a shortcut, via the green phone receiver icons, to call contacts.

Click and hold one of the listed contacts to display the **Call History Call Details** screen pop-up as illustrated in Figure 02 below.

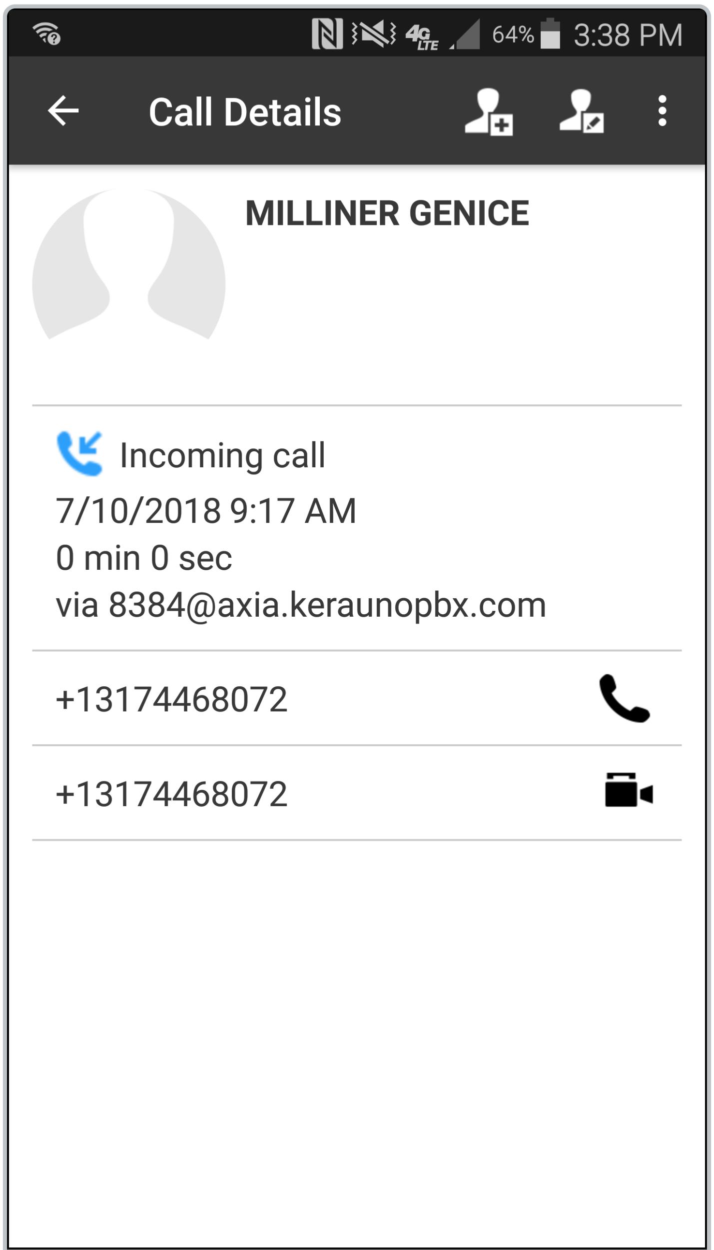


Figure 02 Call History Call Details Screen

From this pop-up screen you can view details of the call such as the type of call (incoming, outgoing, or missed), the date and time of the call, the time spent on the call, the number/extension the call was on, and the contact's phone number and email address.

Delete Call Log Entries in Bolt for Android Devices

Last Modified on 08/08/2018 8:08 am EDT

There are several ways to delete Call Log entries with Bolt for Android. This article describes the these methods.

NOTE:	Bolt call history is local to that instance of Bolt. Kerauno will contain the call history for the user across all devices. Deleting a call record in Bolt will not delete the record in Kerauno.

Delete Call Logs via Call Details

From the Bolt for Android dialpad, press the **Call Entry** you want to delete as indicated in Figure 01 below.

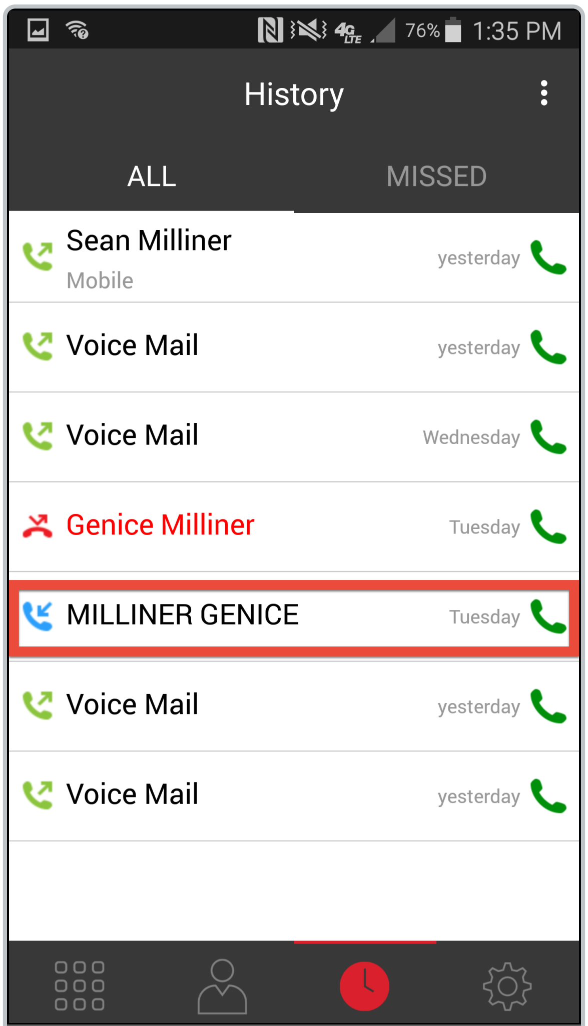


Figure 01 Call Log

This will display the **Call Log - Call Details** screen as illustrated in Figure 02 below.

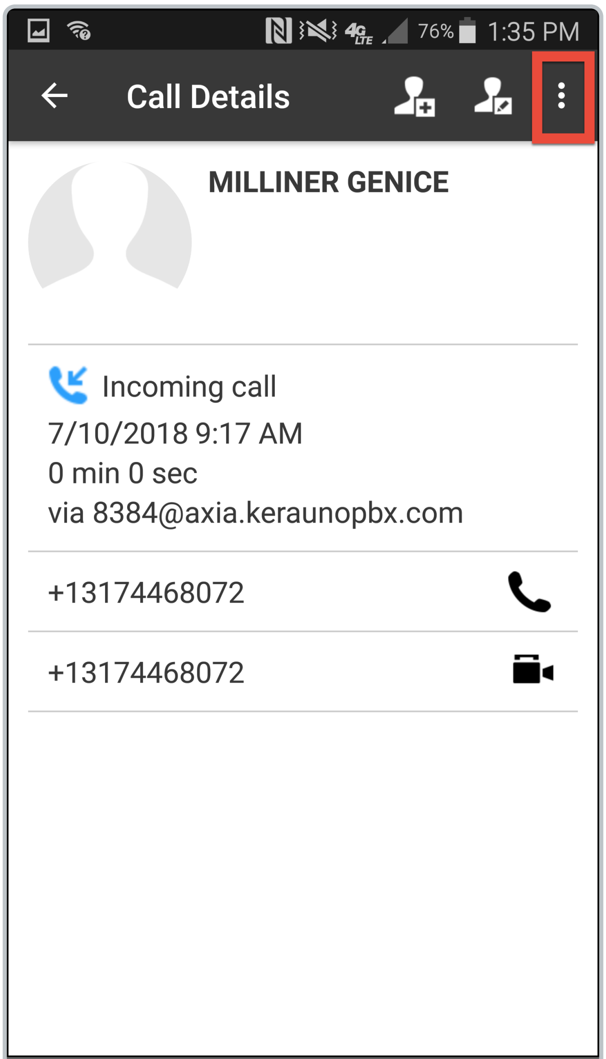


Figure 02 Call Log-Call Details Screen

On the **Call Details** screen, select the three vertical dots in the upper-right of the screen as indicated in Figure 02 above.

A drop-down menu is displayed as illustrated in Figure 03 below.

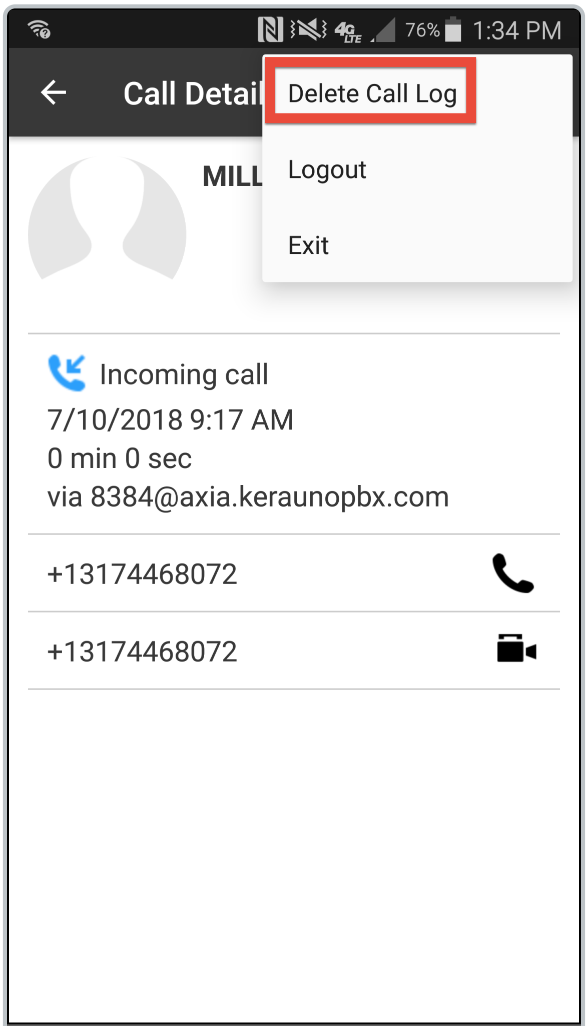


Figure 03 Call Details Drop-Down Menu

Select **Delete Call Log** from the drop-down to remove the **Call Log**.

Delete Call Logs via "Long Press"

To delete a call from the **Call Log** using a "long press", find the call you want to delete then press and hold that call. The call summary pop-up is displayed as illustrated in Figure 04 below.

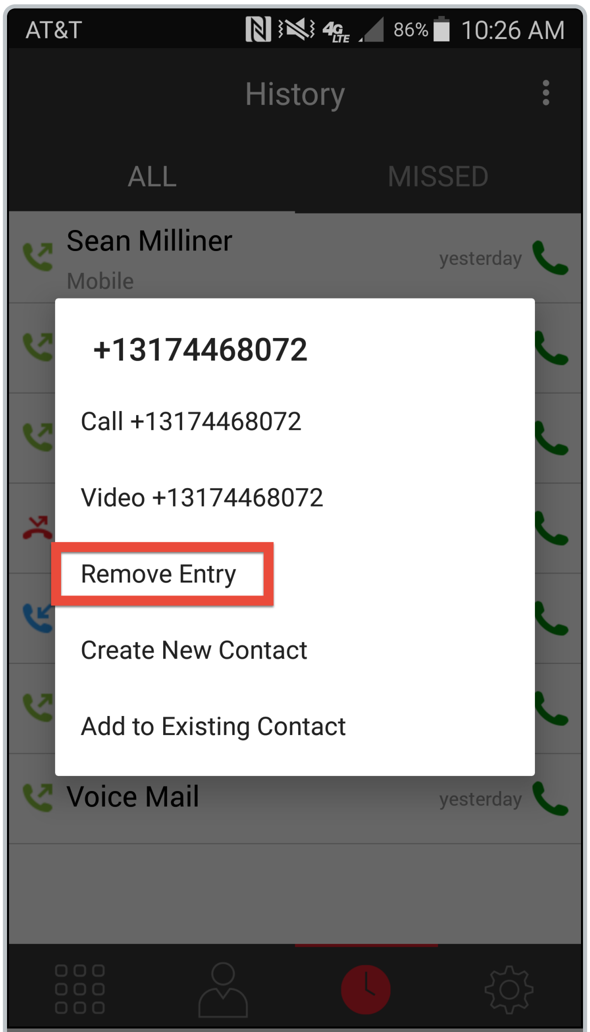


Figure 04 Bolt Call Summary Pop-Up

Select **Remove Entry** from the pop-up to delete the call.

Delete All Call Logs

To clear all calls from the **Call Log**, select the three vertical dots at the top-right of the **Call History** screen as illustrated in Figure 05 below.

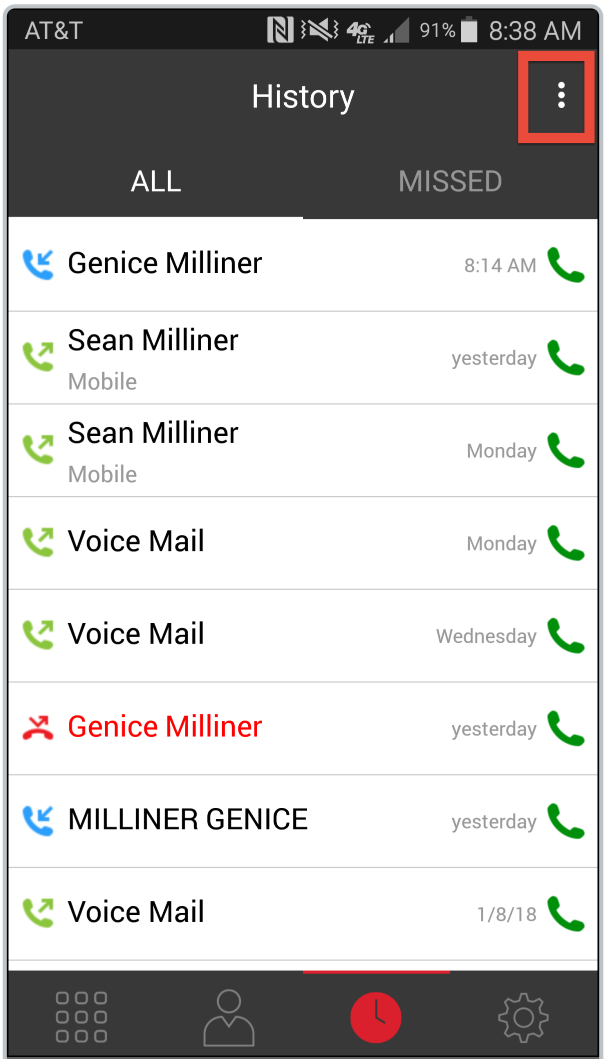


Figure 05 Call History

This displays a pop-up menu as illustrated in Figure 06 below.

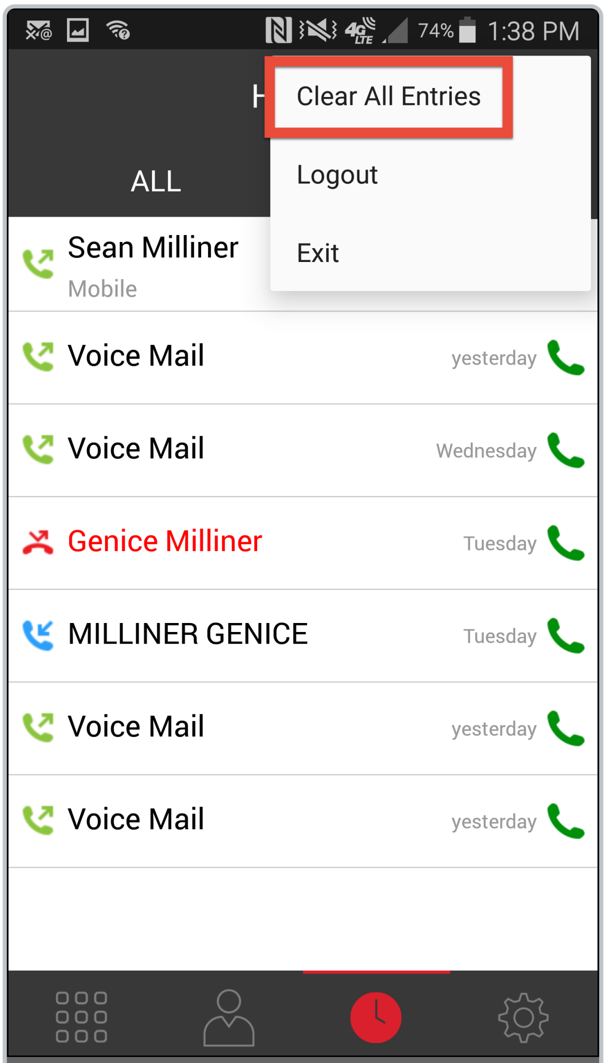


Figure 06 Call Log Pop-Up Menu

Select **Clear All Entries** from the pop-up menu to remove all call entries from the **Call Log**.

Incoming Call via Bolt for Android Devices

Last Modified on 07/25/2018 8:59 am EDT

The incoming call is displayed in Bolt for Android devices. When Bolt is in the background and you receive a call, Bolt is automatically brought to the foreground. You can answer a second incoming Bolt call if you are already on a Bolt call.

Incoming Call

When you receive an incoming call in Bolt for Android the screen will look similar to the Figure 01.The name at the or number for the caller is displayed at the top-center of the screen along with the notation "Incoming Call".

Figure 01 Incoming Call on Bolt for Android

Drag the **Accept Call** button (green phone receiver on the lower-left) right to accept the call; drag the **Decline Call** button (red phone receiver on the lower-right) to decline the call.

If you accept a second incoming Bolt call, Bolt places the initial call in progress on hold. If you decline the second incoming call, the call in progress continues.

Bolt's advanced calling options are available when you accept a Bolt call.

Incoming Native Call

When you receive an incoming call in Bolt for Android the screen will look similar to the Figure 01. The name or number for the caller is displayed at the top-center of the screen along with the notation "Incoming Call". You can receive a native call while you are on a Bolt call. The incoming native call is displayed as a notification in front of the existing Bolt call.

Drag the **Accept Call** button (green phone receiver on the lower-left) right to accept the call; drag the **Decline** call button (red phone receiver on the lower-right) to decline the call.

If you accept a second incoming Bolt call, Bolt places the initial call in progress on hold. If you decline the second incoming call, the call in progress continues.

Bolt's advanced calling options are available when you accept a Bolt call.

Login to/Logout of Bolt for Android Devices

Last Modified on 08/09/2018 3:28 pm EDT

This article discusses how to launch Bolt on an Android cell phone or tablet, login, exit, and logout of Bolt on an Android cell phone or tablet.

NOTE:	Bolt login is local and unique to that instance of Bolt. It is not the same as the Kerauno login.

Launch and Login to Bolt

To launch Bolt on your Android device, select the Bolt icon as illustrated in Figure 01 below.

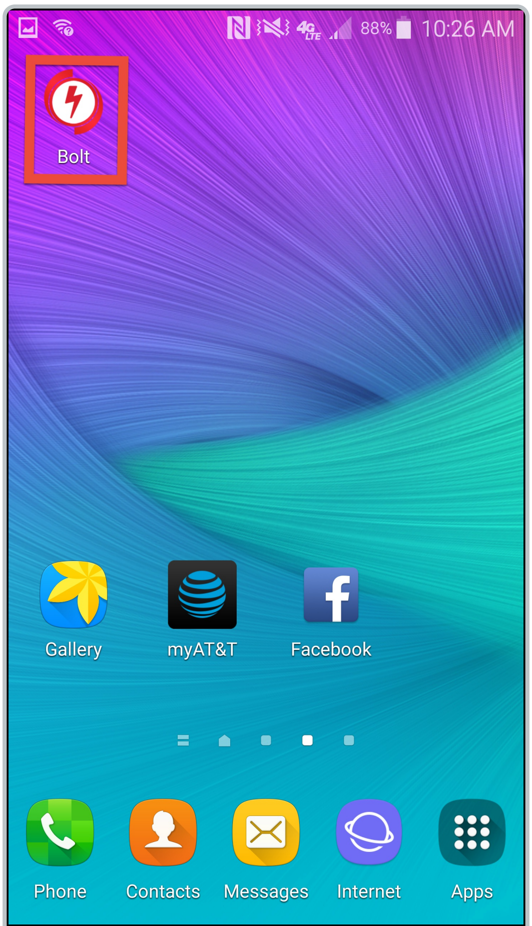


Figure 01 Bolt Icon

This launches Bolt and displays your login screen (displayed in Figure 02 below).

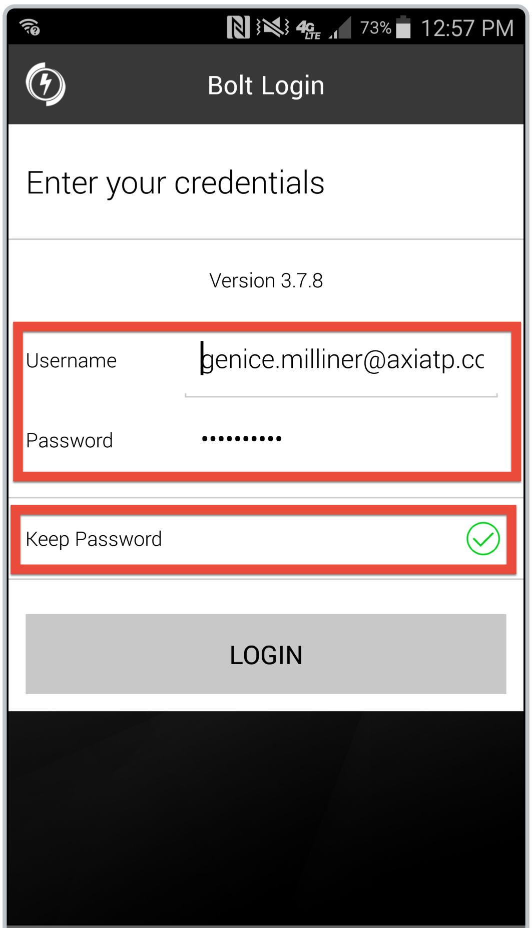


Figure 02 Bolt Android Login Screen

Enter your **Username** and **Password**. If you want to save your password so you don't have to enter it each time ensure the **Keep Password** checkbox is selected. Press the **Login** button to login to Bolt on your Android device.

Bolt for Android opens to the **Phone Ready** screen as illustrated in Figure 03 below.

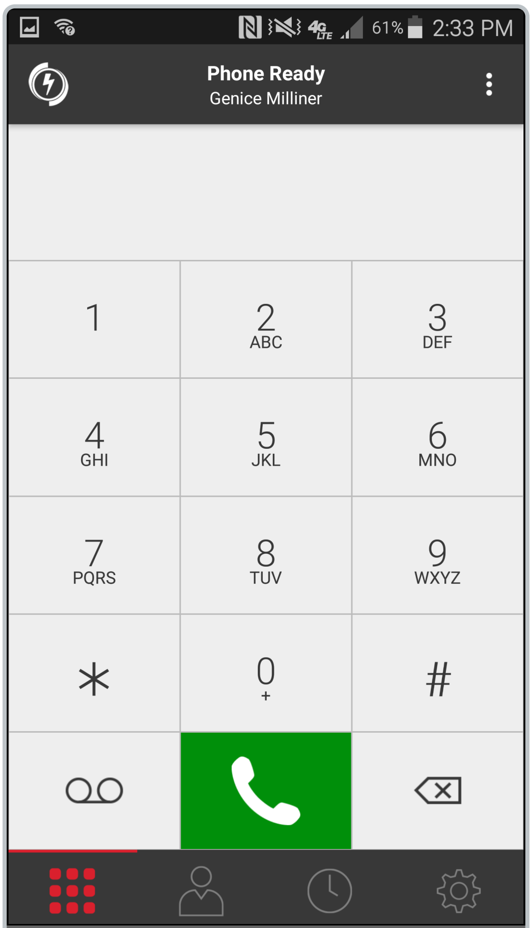


Figure 03 Bolt Phone Ready Screen

Exit Bolt

To exit Bolt, select the three vertical dots in the upper-right corner of the screen then press the **Exit** button on the drop-down as illustrated in Figure 04 below.

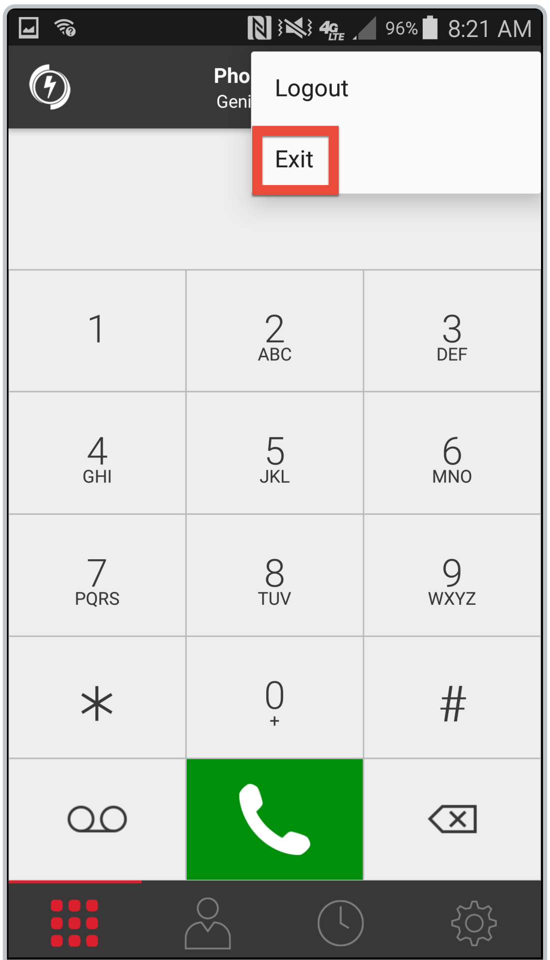


Figure 04 Bolt Android Exit Button

NOTE:	Pressing the **Exit** button only exits the Bolt Android application; it does *not* log you out of the application.

Logout of Bolt

To completely logout of the Bolt Android application, select the three vertical dots in the upper-right corner of the screen then press the **Logout** button on the drop-down as illustrated in Figure 05 below.

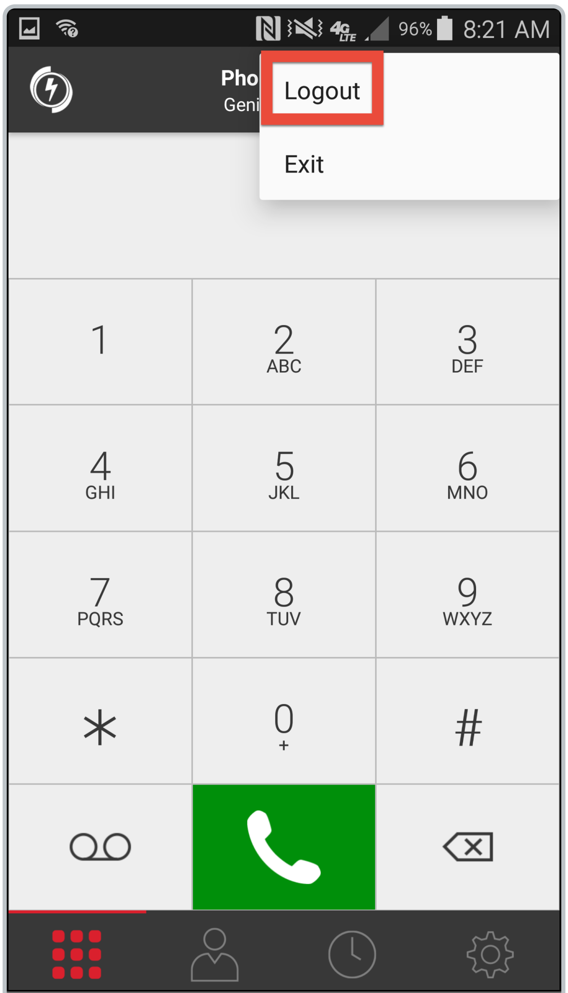


Figure 05 Bolt Android Logout

This logs you completely out of the system and it will display the **Login** screen the next time you launch Bolt on your Android device.

Placing a Call with Bolt for Android Devices

Last Modified on 08/08/2018 8:04 am EDT

There are multiple ways to make calls using Bolt for Windows such as keying in the phone number, selecting a contact, or selecting a number from your **Call History**.

NOTE:	The Bolt for Windows Contacts Directory is not currently linked to Kerauno. It is on the development roadmap. In the future, this directory will pull information directly from Kerauno.

Place a Call Using the Dialpad

1. From to the **Phone** tab enter the number or the name you want to call. (Use 2 for A, B, C; use 3 for D, E, F; etc.) as illustrated in Figure 01 below.

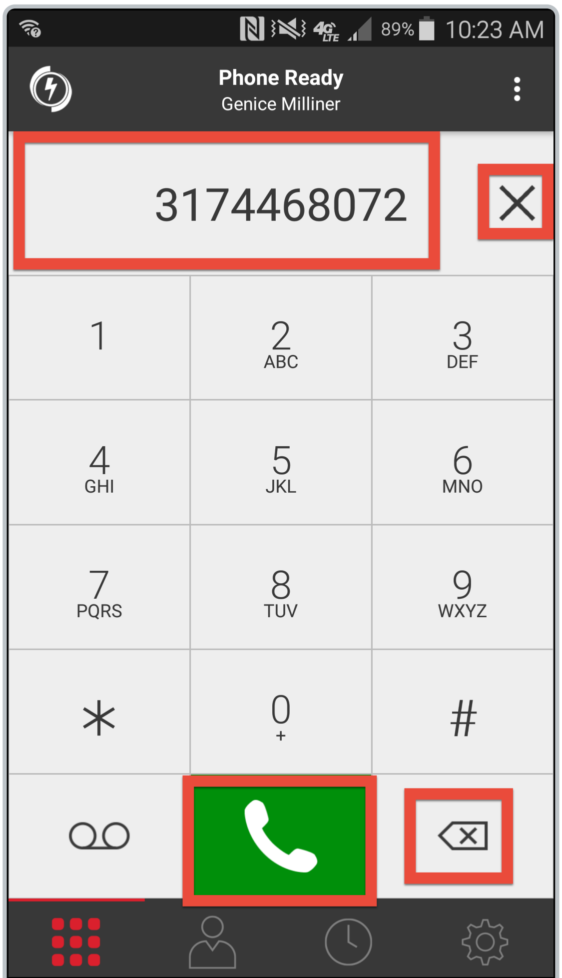


Figure 01 Bolt Android Dialpad

2. Bolt for Windows displays a list of matches and refines the list as you enter

numbers and characters. To clear the entry, tap the X to the right of the entry field; to remove one or two characters, press the arrow with the X in it st thr bottom-right of the screen (as indicated if Figure 01 above).

3. Tap the green phone receiver at the bottom-center of the dialpad to make the call.

Place a Call with Contacts

NOTE:	The Bolt for Windows Contacts Directory is not currently linked to Kerauno. It is on the development roadmap.In the future, this directory will pull information directly from Kerauno.

1. Press the **Contacts** button at the bottom of the screen to display a list of contacts (as illustrated in Figure 02 below).

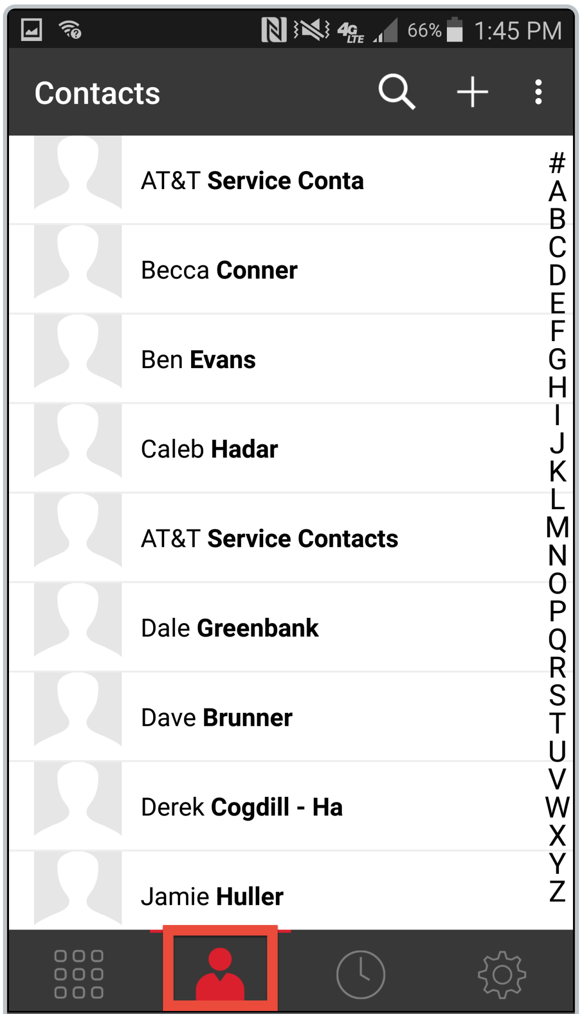


Figure 02 Contacts Button

2. You can enter the name you want to call; Bolt for Windows displays a list of matches and refines the list as you enter letters. You can also select a letter

from the alphabet along the right side of the screen to display names beginning with that letter then select from the resulting list. Refer to Figure 03 below.

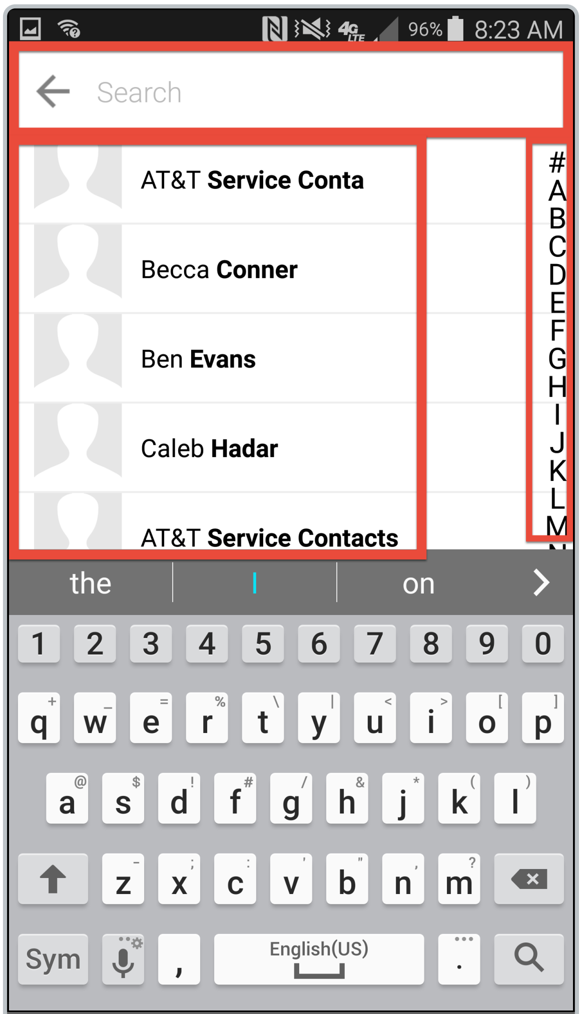


Figure 03 Bolt List of Contacts

3. When you select the contact you want to call, the **Contact Details** screen is displayed as illustrated in Figure 04 below.

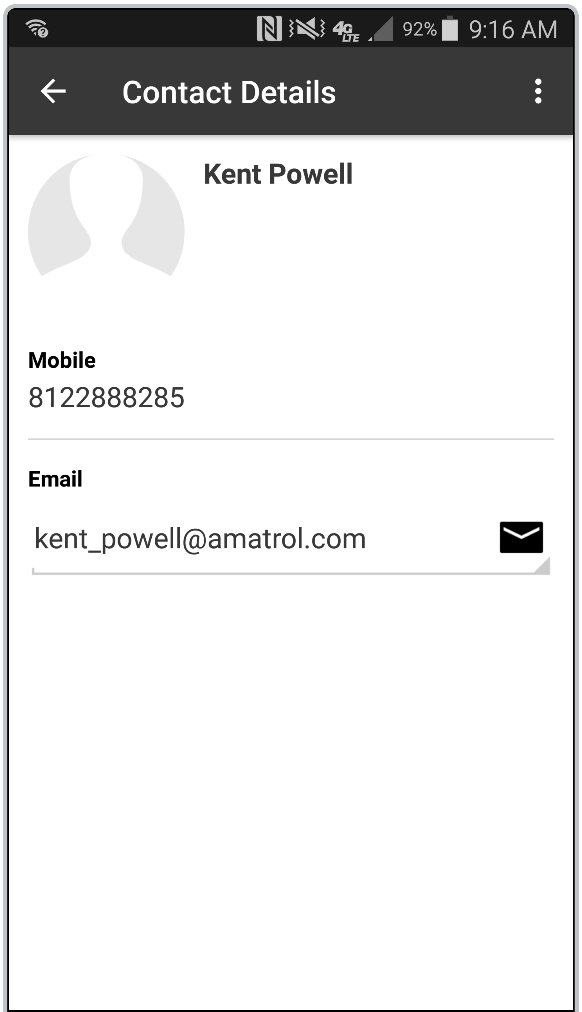


Figure 04 Contact Details Screen

4. Select the displayed phone number you want to call the contact at to make your call; select a listed email address to send the contact an email message.

NOTE:	Contacts may have multiple phone numbers (work, mobile, home, etc.) and multiple email addresses listed. Ensure you select the appropriate number or email address.

Place a Call Using Call History

Calls can also be placed using the **Call History** screen as illustrated in Figure 05 below.

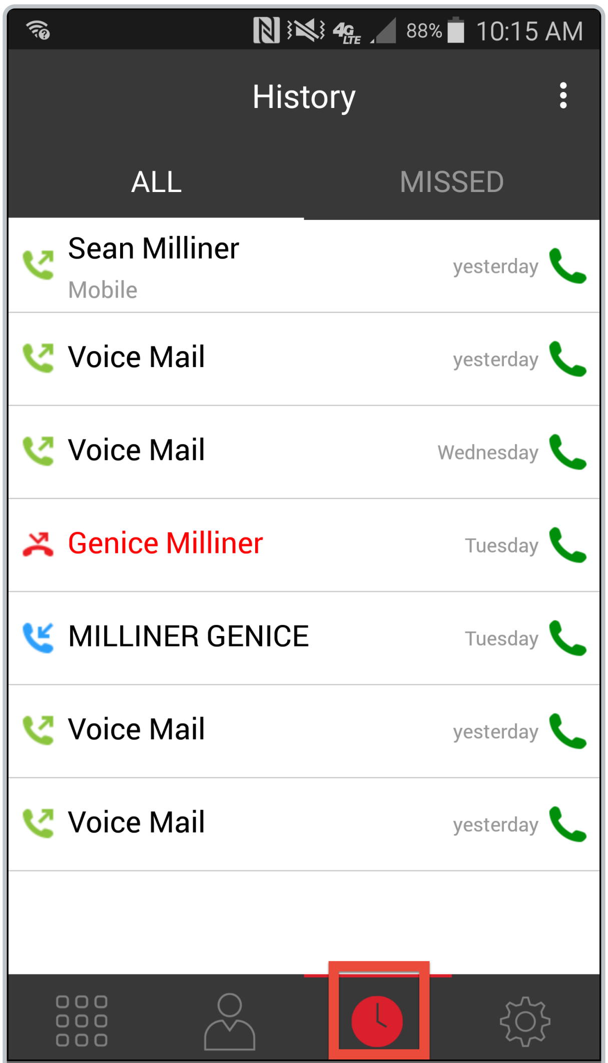


Figure 05 Bolt Android Call History Screen

1. Select the Call History button (as indicated in Figure 05 above to display the **Call History** screen.
2. Find the name of the contact you want to call then select the green phone receiver button to the right of the contact name to make the call.

Voicemail Using Bolt for Android Devices

Last Modified on 08/08/2018 8:08 am EDT

Bolt for Android provides an easy way to access voicemail.

From the Bolt for Android Dialpad press the **Voicemail** button at the bottom-left of the screen as indicated in Figure 01 below.

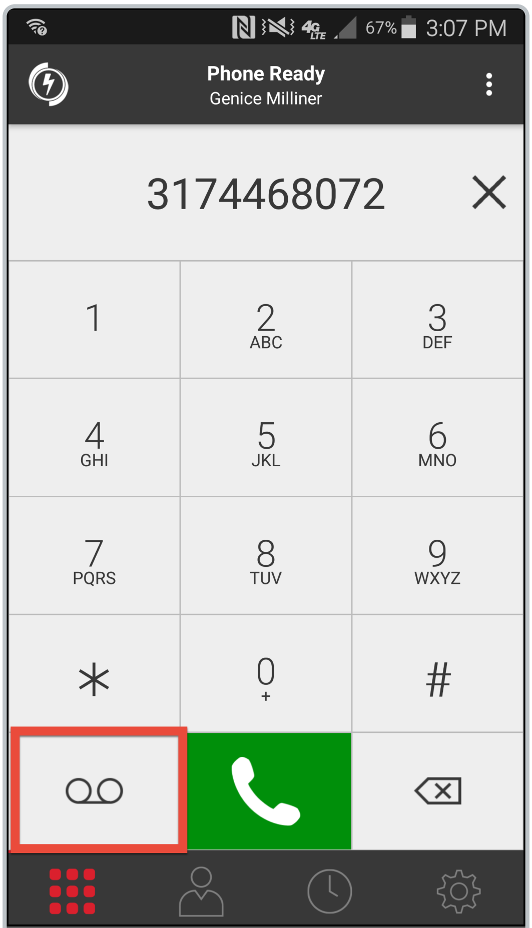


Figure 01 Dialpad Voicemail Button

Follow the automated voicemail instructions you hear to access your voicemail,

Attended Transfers in Bolt for Android Devices

Last Modified on 08/08/2018 8:09 am EDT

Calls can be transferred to a second party in two ways: attended or unattended. In an attended transfer, the first party speaks to the second party before transferring the call. In an unattended, or blind transfer, the first party sends the call to a second party without talking to the second party in advance.

Below are steps to complete an attended transfer:

1. While on a call, use any method to establish a second call to the party you are transferring the current call to (refer to the "Place a Concurrent, or Second, Call" article).
2. Once the representative has answered and you have spoken about the transfer, press the **More** button as illustrated in Figure 01 below.

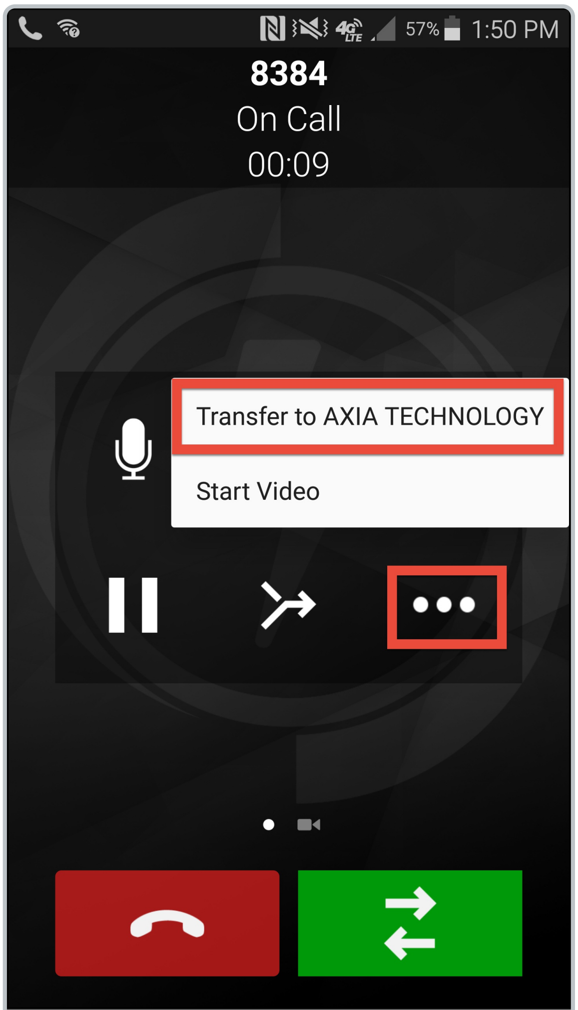


Figure 01 More Button for Call Transfer

3. Press the **Transfer to** other call prompt. A message will briefly be displayed telling you the call is being transferred (refer to Figure 02 below).

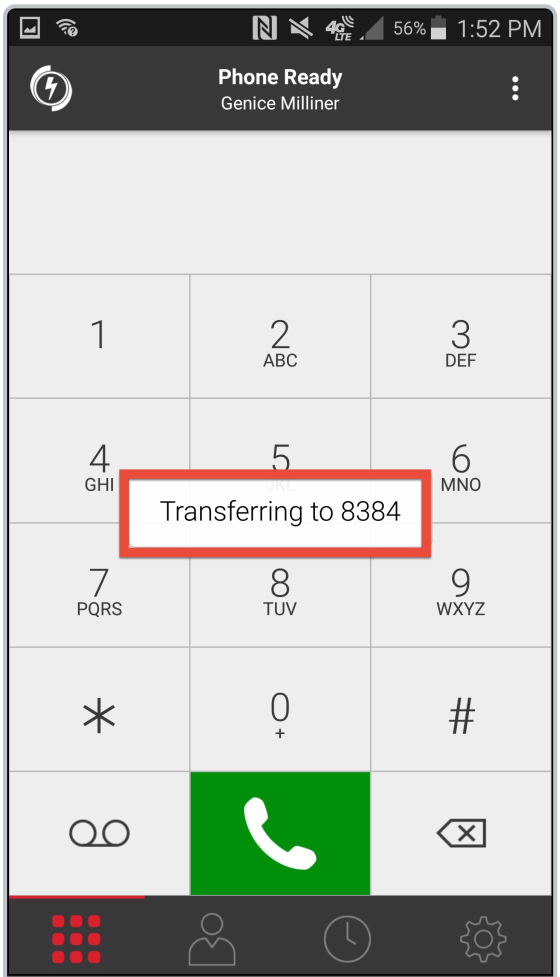


Figure 02 Transferring Call Message

Unattended Transfers in Bolt for Android Devices

Last Modified on 08/08/2018 8:10 am EDT

Calls can be transferred to a second party in two ways: attended or unattended. In an attended transfer, the first party speaks to the second party before transferring the call. In an unattended, or blind, transfer the first party sends the call to a second party without talking to the second party in advance.

Below are steps to complete an unattended transfer

1. While on a call, press the **More** button as indicated in Figure 01 below.

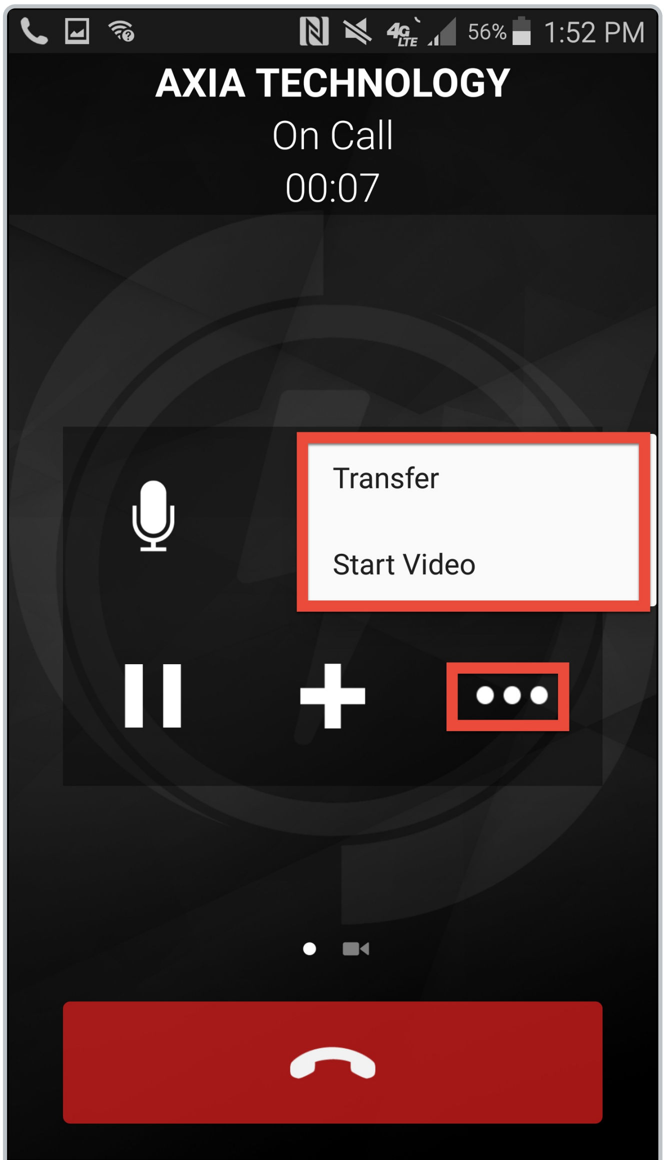


Figure 01 More Button and Transfer Pop-Up

2. When the pop-up menu is displayed, press **Transfer** as illustrated in Figure 01

above.

3. The **Dialpad** is displayed, as illustrated in Figure 02 below, use any method to establish a second call to the party you are transferring the current call to (refer to the "Place a Concurrent, or Second, Call" article).

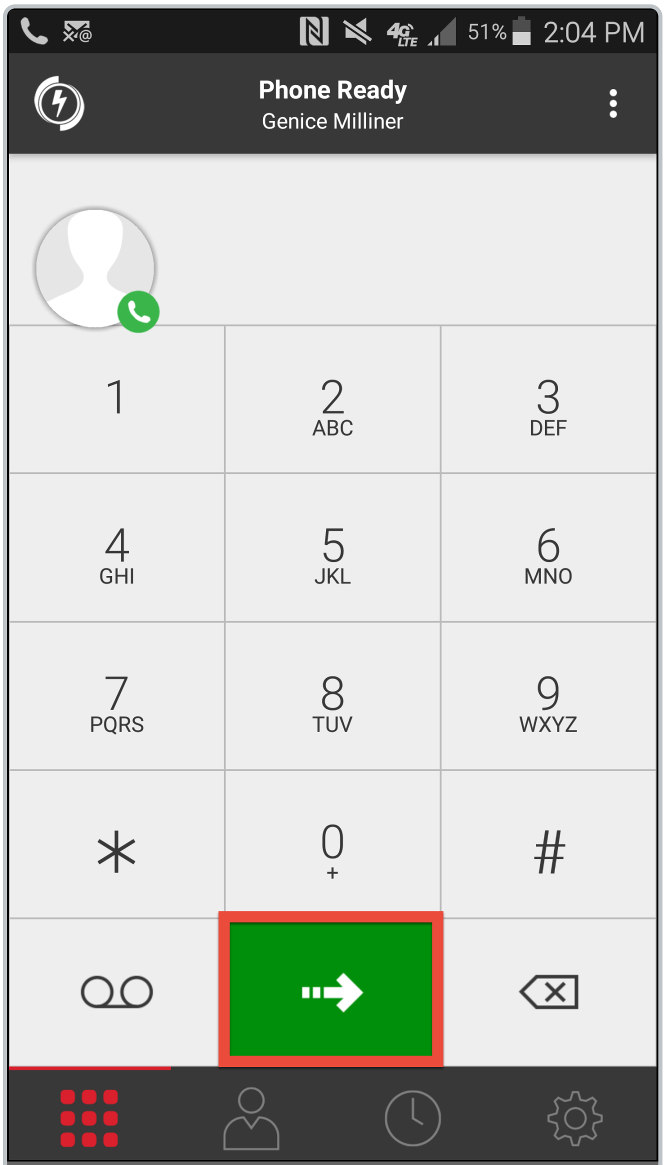


Figure 02 Transfer Call Button

4. Bolt will briefly display a transfering call message as illustrated in Figure 03 below.

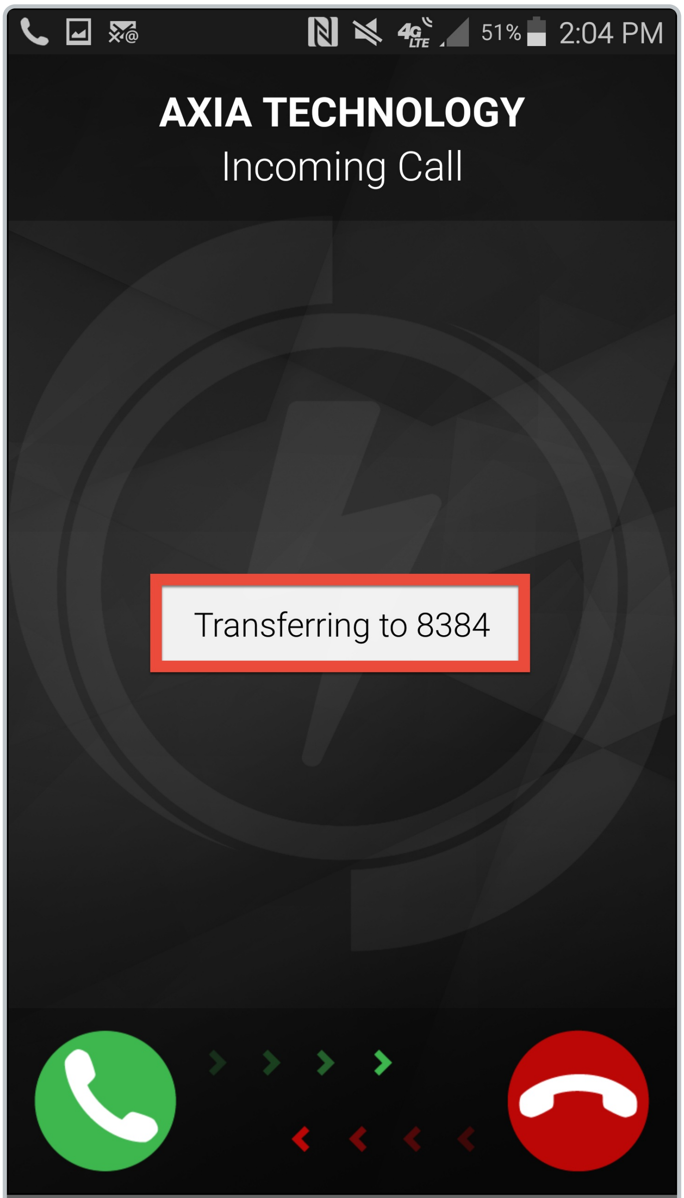


Figure 03 Transferring Call Message

Navigate Away from a Call and Return to an Active Call in Bolt for Android

Last Modified on 04/16/2019 9:46 am EDT

There may be times when you are on a call in Bolt on an Android phone and need to navigate away from the call (for example, to make another call). You can also easily navigate back to an active call. Both are explained in this article.

Navigate Away from a Call

When a call comes in, as illustrated in Figure 01 below, accept the call.

Figure 01 Incoming Call

When you need to navigate away from the call, you can press the **Pause** button as illustrated in Figure 02 below. This effectively puts the call on hold.

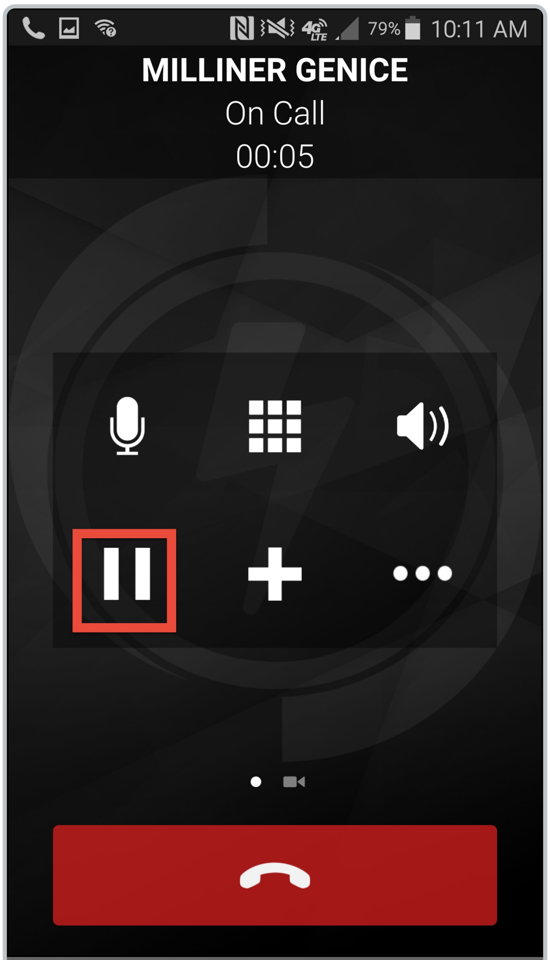


Figure 02 Pause Call

You can also simply use the buttons on the **Android Control Bar** as illustrated in Figure 03 below.

Figure 03 Android Control Bar

Return to an Active Call

To return to an active call after navigating away from it press the **Navigation** button on the **Android Control Bar** as illustrated in Figure 04 below.

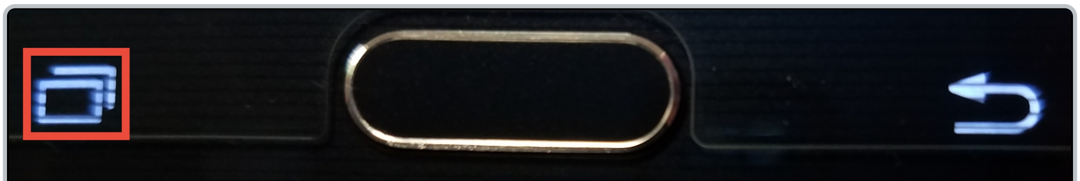


Figure 04 Android Control Bar - Navigation Button

This displays the **Navigation Center** as illustrated in Figure 05 below.

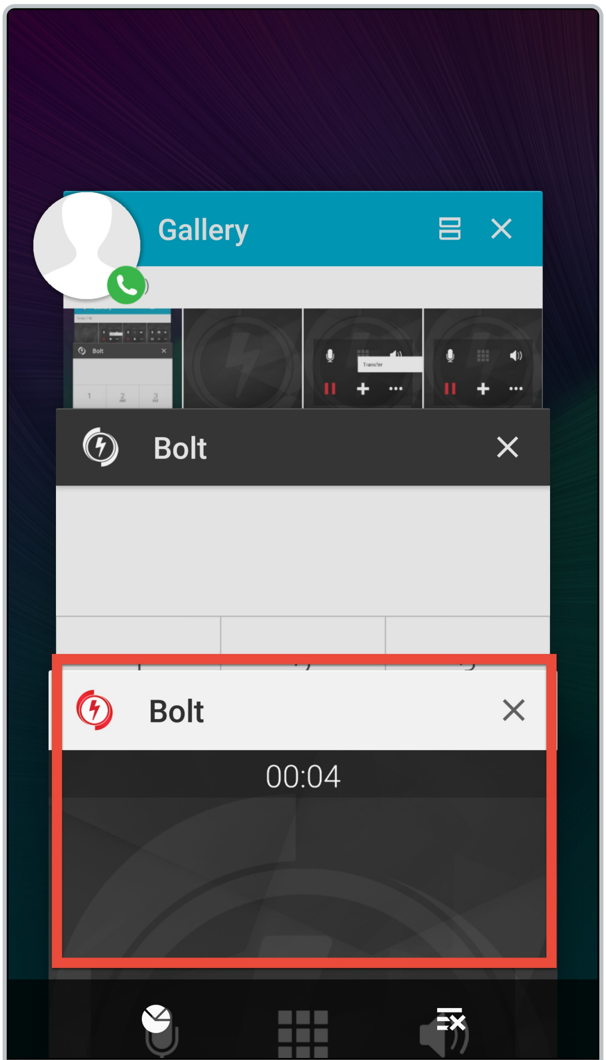


Figure 05 Navigation Center

Tap the Bolt Phone call as indicated in Figure 05 above to return to the call.

Place a Concurrent, or Second, call in Bolt for Android Devices

Last Modified on 08/08/2018 8:10 am EDT

If you have already established one call, Bolt lets you place a second call.

Place a Second Call Using the Dial Pad

1. Press the Hold button to put the first call on hold as illustrated in Figure 01 below.

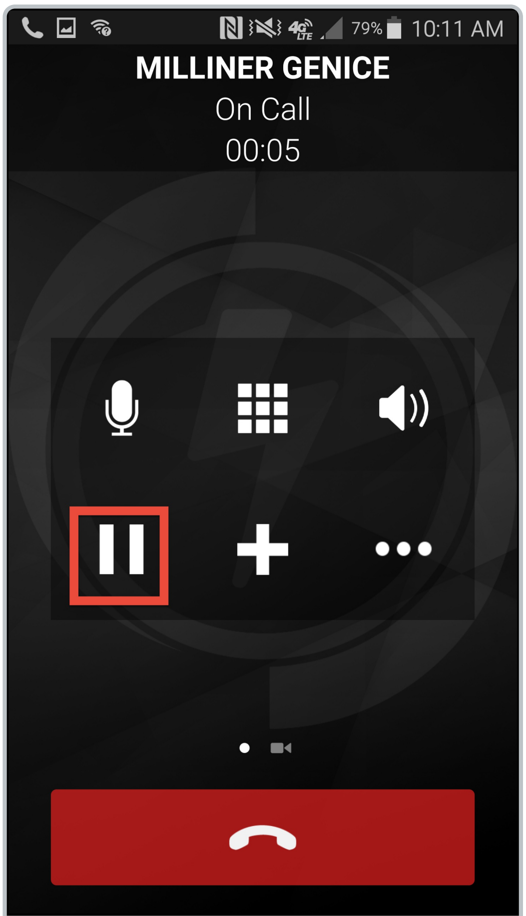


Figure 01 Hold Button

2. Press the **Add Call** button as indicated in Figure 02 below.

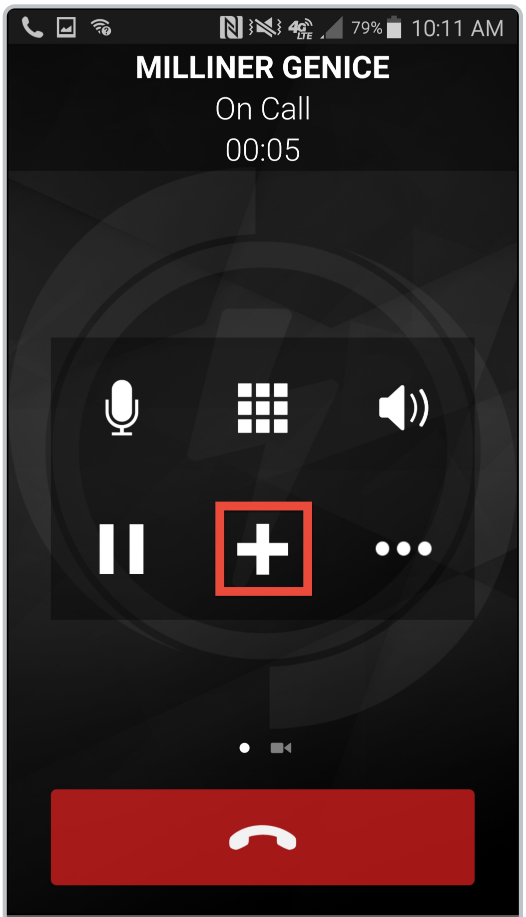


Figure 02 Add Call Button

3. Enter the number or name you want to call when the **Dial Pad** screen is displayed. Then press the green phone receiver button to make the call; Bolt connects the second call.

NOTE:	If you pause (put on hold) or end one of the calls, Bolt automatically switches to the other call

Place a Second Call Using Contacts

1. Press the **Plus** button, as indicated in Figure 03 below, to display the **Dialpad**.

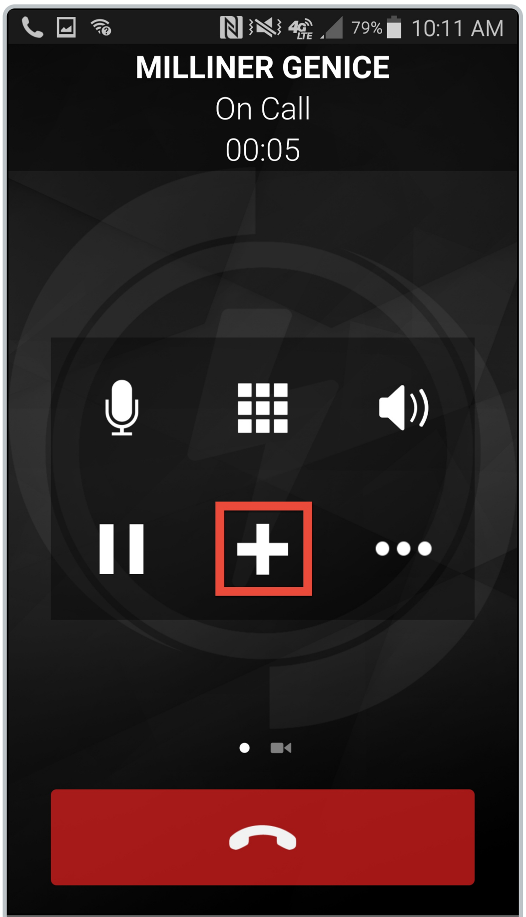


Figure 03 Add a Call Button

2. When the **Dialpad** is displayed, as illustrated in Figure 04 below, press the **Contacts** button to display the **Contacts List**.

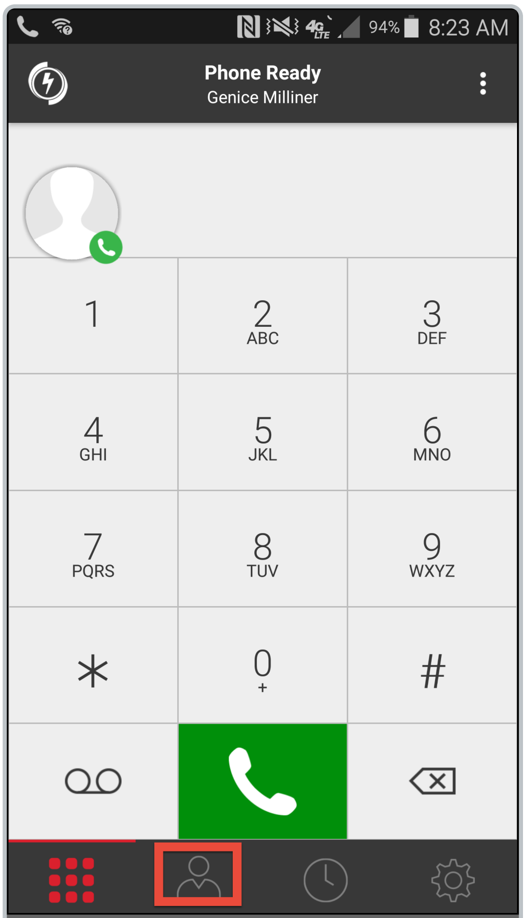


Figure 04 Bolt Dialpad

3. Press the name of the contact you want to call. Scroll to find the contact or use the magnifying glass to search your contacts for the appropriate person.

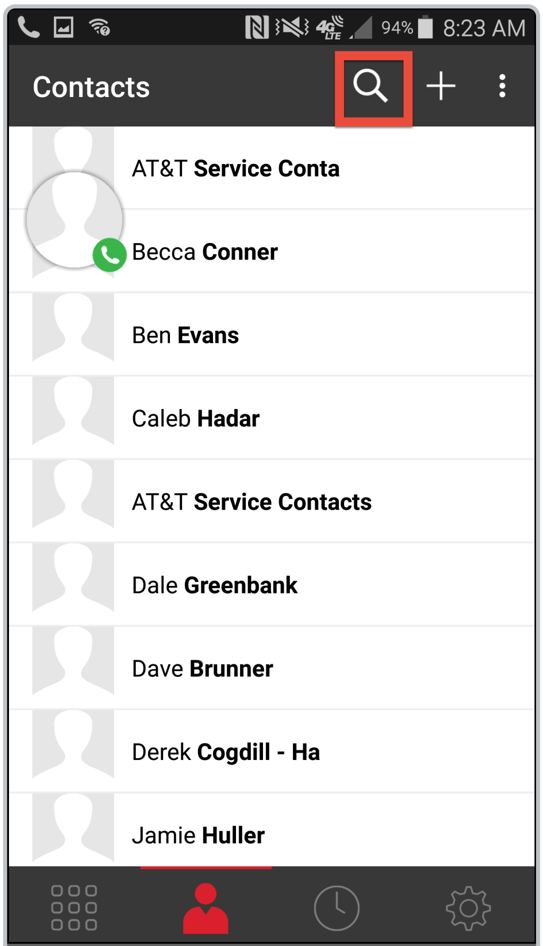


Figure 05 Contacts Screen

4. Press the contact number, as indicated in Figure 06 below, to initiate the call.

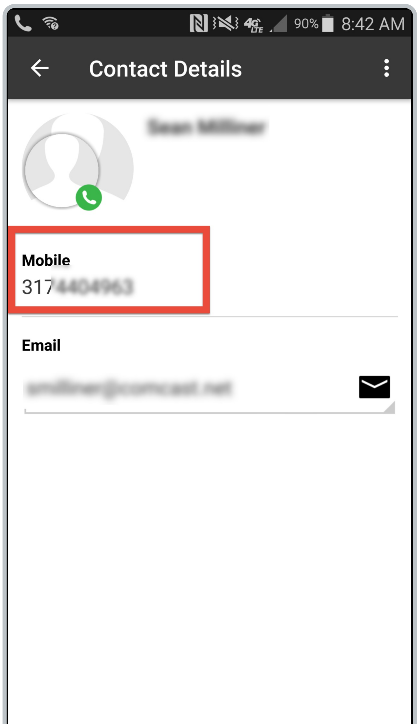


Figure 06 Contact Details Screen

Bolt dials the number to initiate the call.

Place a Second Call Using Call History>Call Details

1. Press the **Plus** button, as indicated in Figure 07 below, to display the **Dialpad**.
2. When the **Dialpad** is displayed press the **Call History** button to display the **Call History List**.

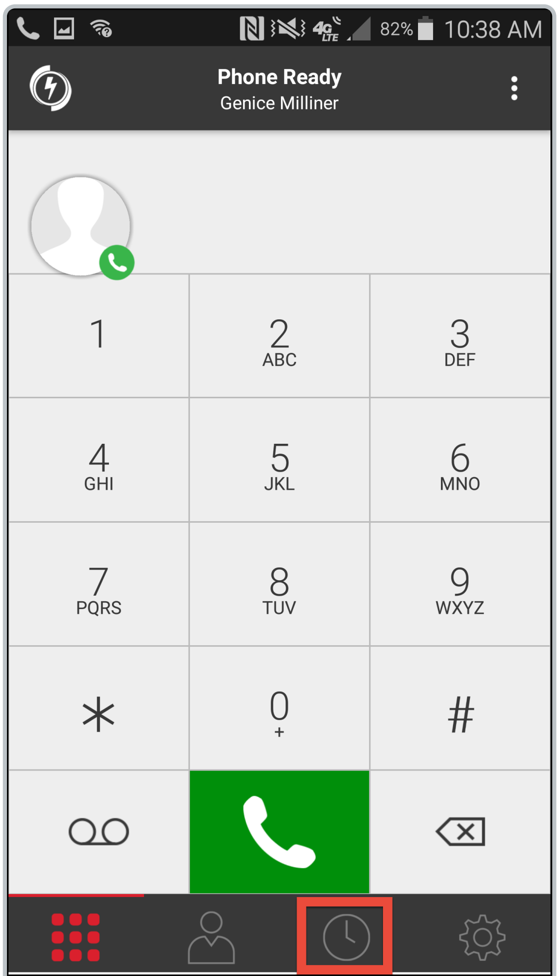


Figure 08 Select Call History Button

3. Press the the individual's name for the individual you want to call. (As indicated in Figure 09 below.) Scroll to find the appropriate number.

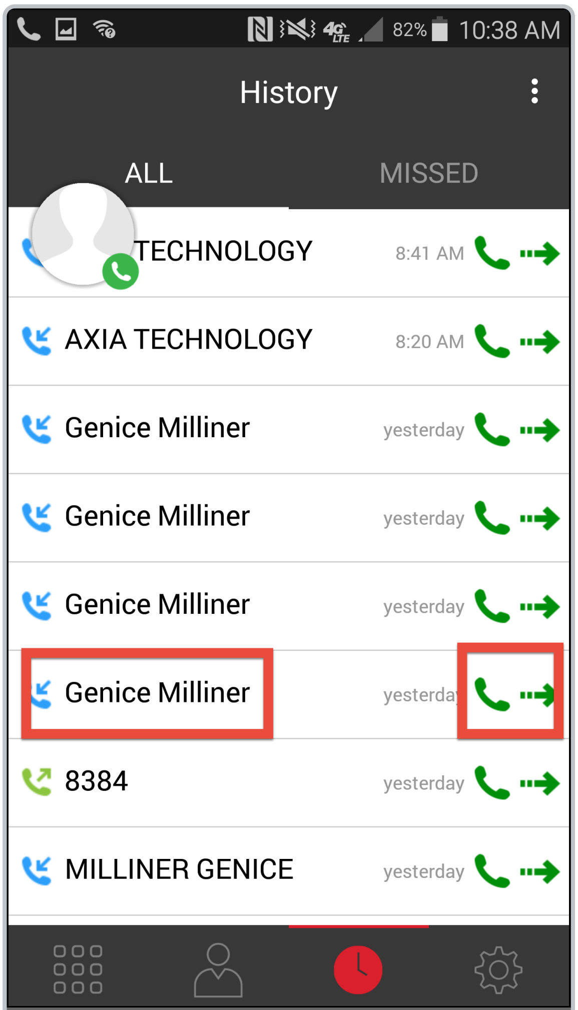


Figure 09 Call History List

4. The **Call Details** screen will be displayed as illustrated in Figure 11 below. Press the number to initiate the call.

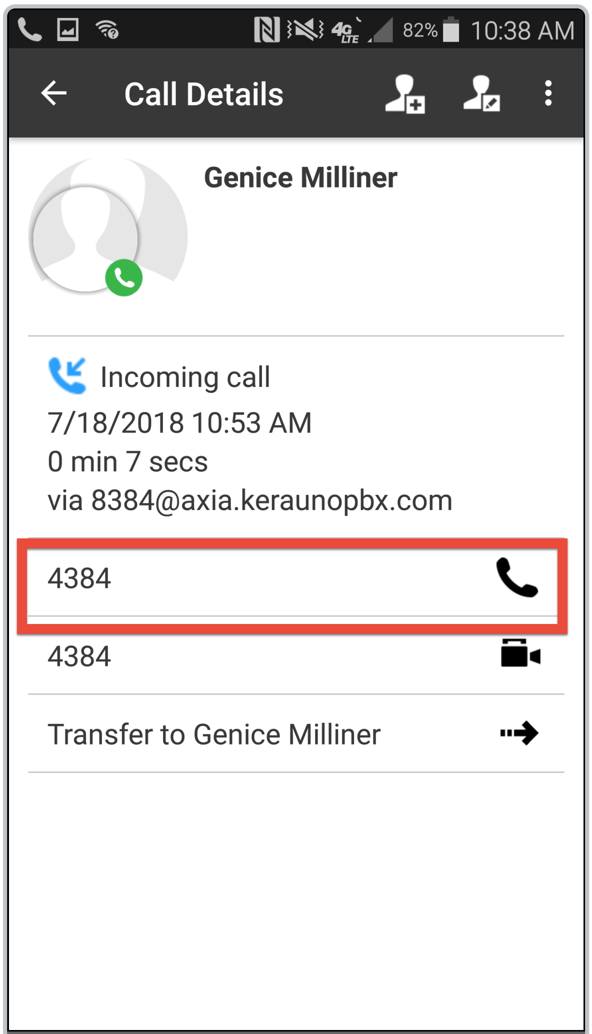


Figure 11 Call Details Screen

Place a Second Call Using Call History>Phone Icon

1. Press the **Plus** button to display the **Dialpad**.
2. When the **Dialpad** is displayed press the **Call History** button to display the **Call History List**.
3. Press the green phone receiver icon for the individual you want to call. (As indicated in Figure 12 below.) Scroll to find the appropriate number.

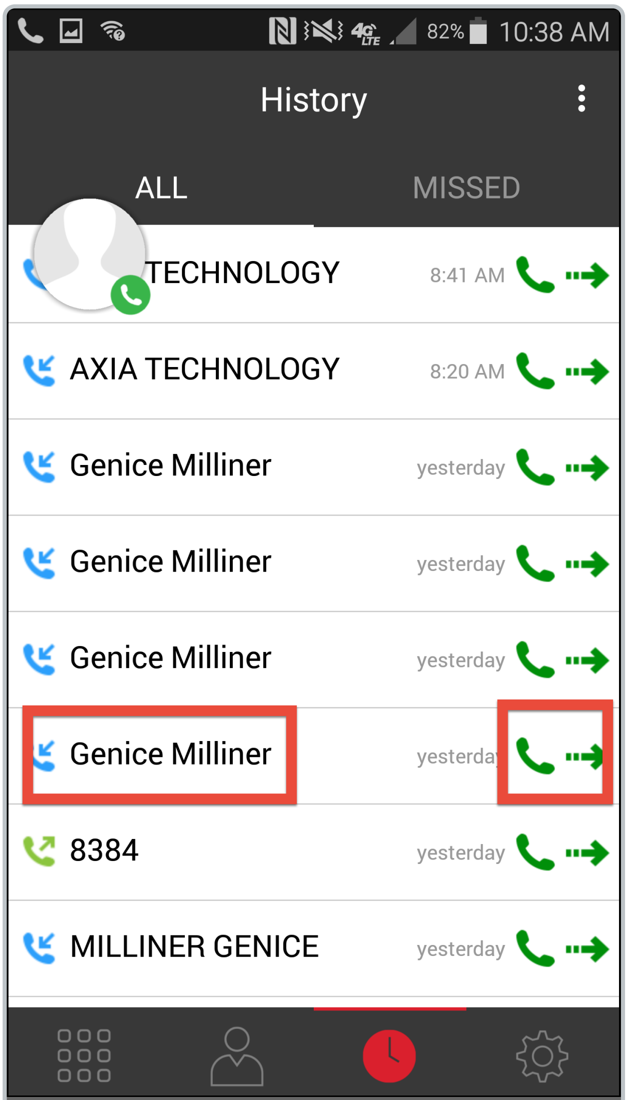


Figure 12 Call History List

4. A **Choose call type** pop-up is displayed as illustrated in Figure 13 below. Press the **Call number** to initiate the call.

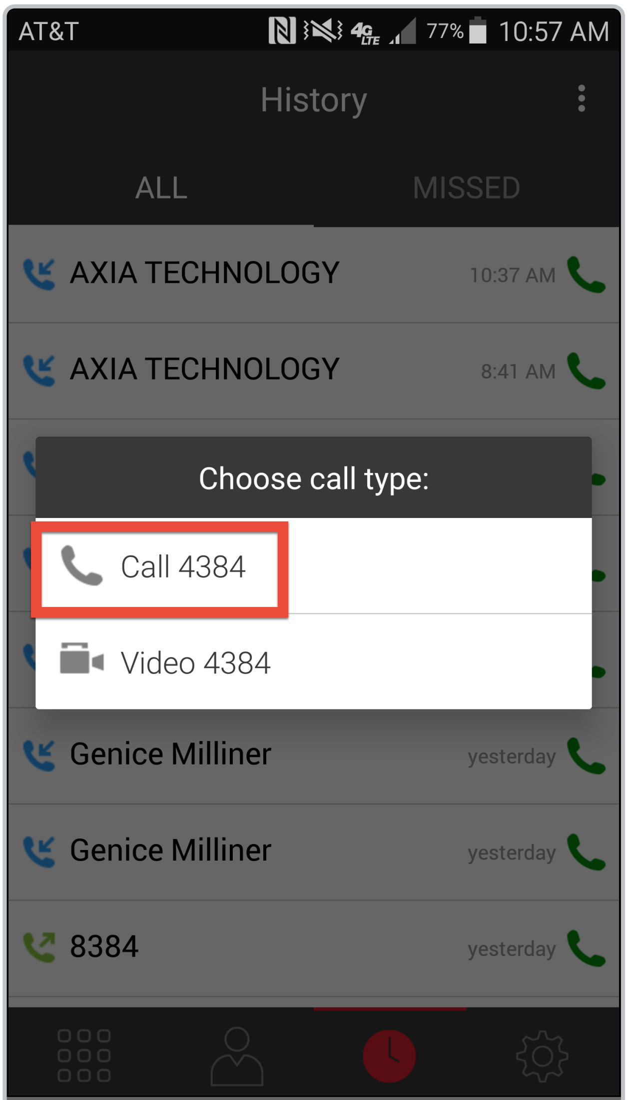


Figure 13 Choose Call Typ Pop-Up

Place a Second Call Using "Long Press"on Call History

1. Press the **Plus** button to display the **Dialpad**.
2. When the **Dialpad** is displayed press the **Call History** button to display the **Call History List**.
3. From the **Call History List**, long press the history entry containing the contact you want to call to display a call pop-up as illustrated in Figure 14 below..

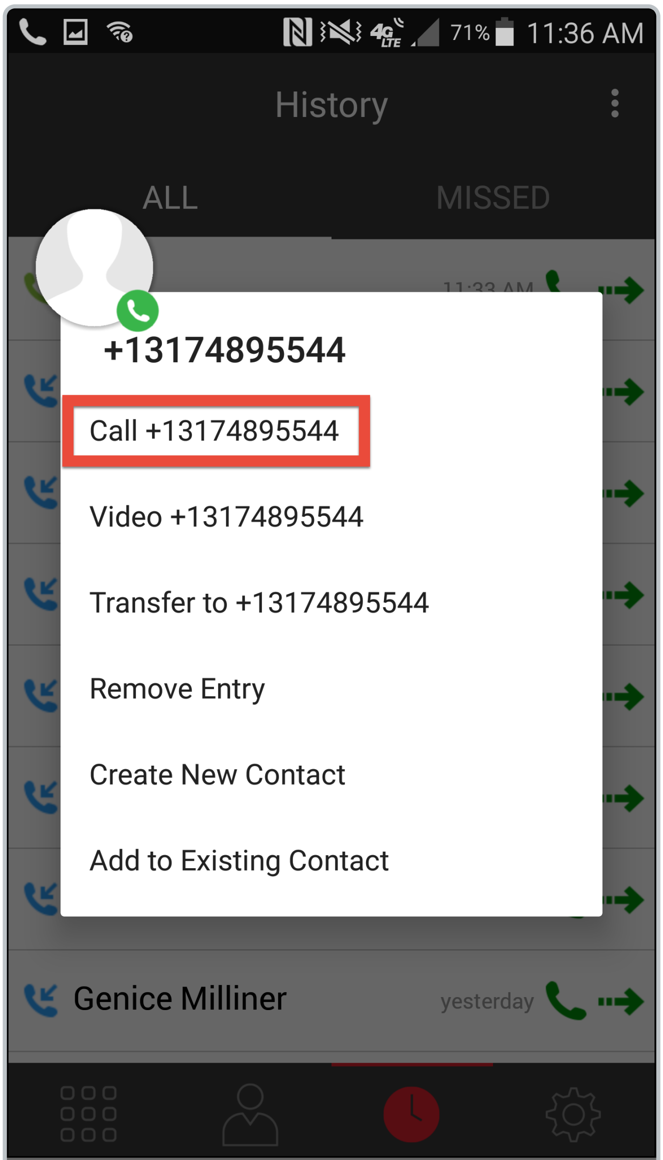


Figure 14 Call History Call Pop-Up

4. Press the **Call number** to initiate the call.

Swap Between Calls in Bolt for Android Devices

Last Modified on 08/08/2018 8:11 am EDT

When you have established two calls in Bolt for Android you can easily swap between the calls.

To swap from your current call to the second call, press the **Swap Calls** button as illustrated in Figure 01 below.

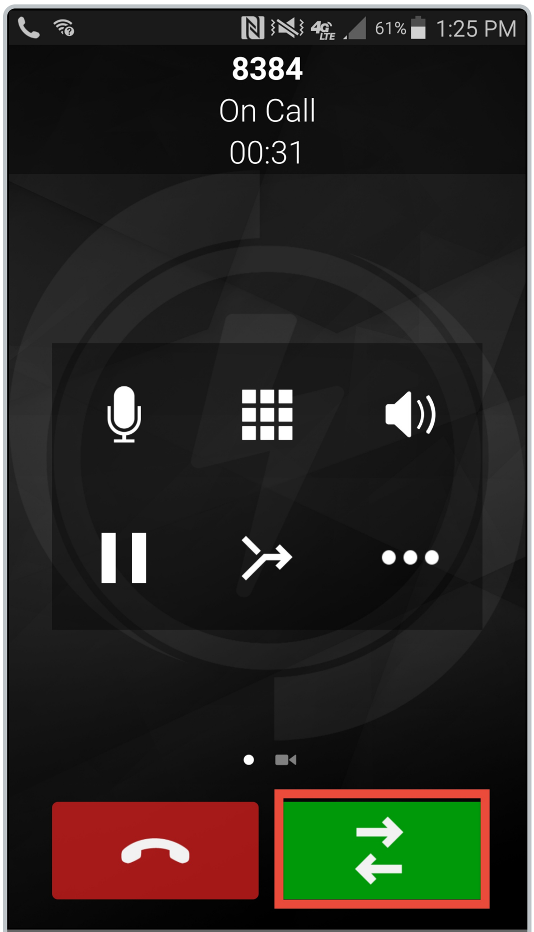


Figure 01 Swap Calls Button

Bolt places the first call on hold and connects the second call. Bolt displays the name of the remote party for the active call.

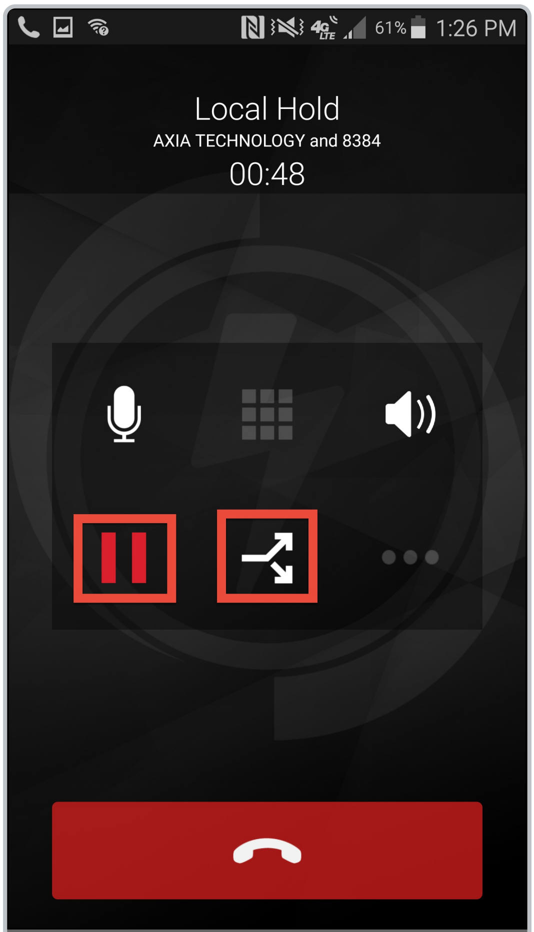


Figure 02 Pause and Swap Call Buttons

Bolt also has a second Swap Call button as indicated in Figure 02 above.

Add/Edit/Delete Contacts in Bolt for Android Devices

Last Modified on 07/25/2018 9:00 am EDT

Contacts are easily added, edited, and deleted in Bolt for Android devices. This article explains how to accomplish each of these tasks.

NOTE:	The Bolt **Contacts Directory** is not currently linked to Kerauno. It is on the development roadmap. In the future, this directory will pull information directly from Kerauno.

Create New Contacts

1. Select the **Contacts** button at the bottom of the Bolt screen as illustrated in Figure 01 below.

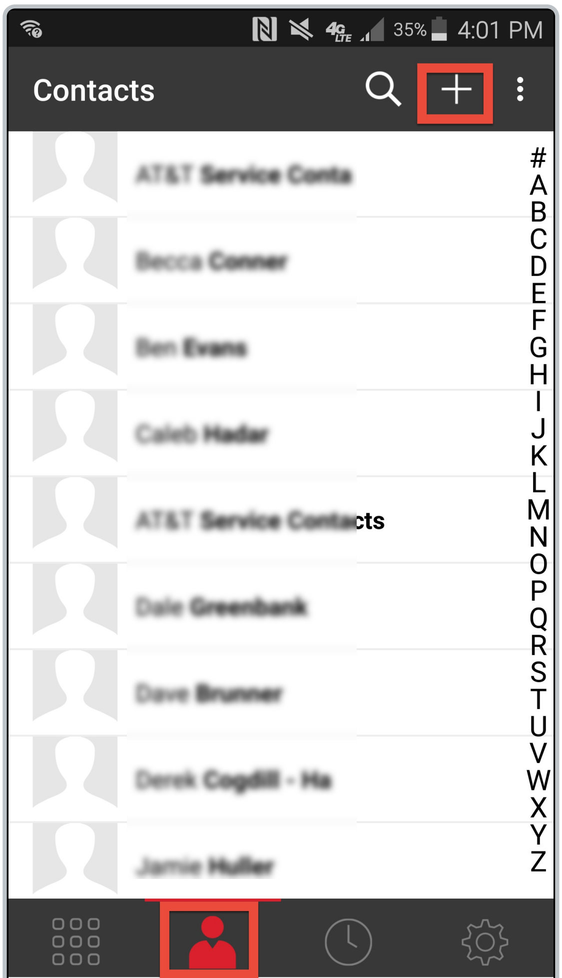


Figure 01 Bolt for Android Contacts Screen

2. Select the **Plus** button, as illustrated in Figure 01 above, at the top-right of the screen to display the **New Contact** screen as illustrated in Figure 02 below.

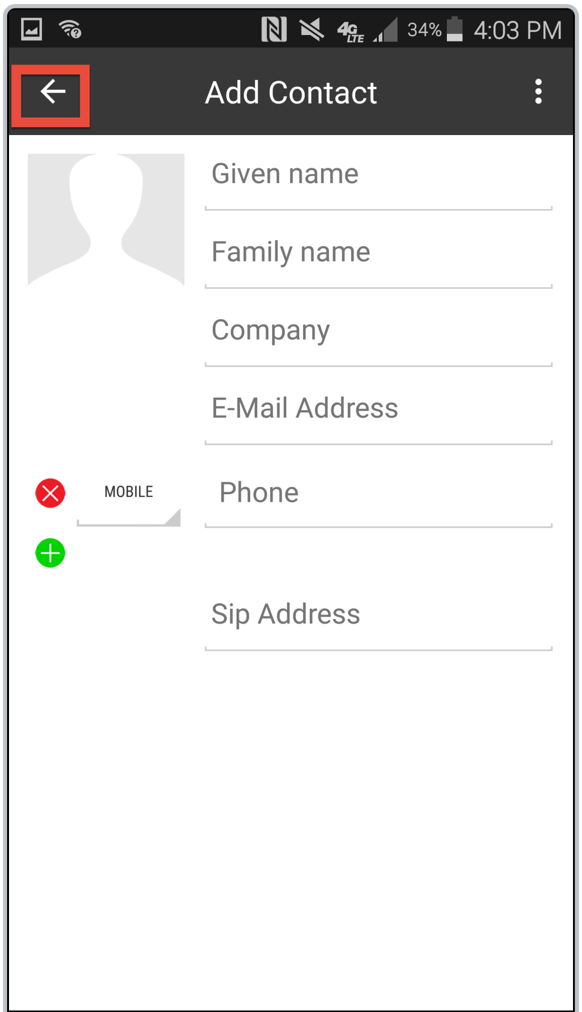


Figure 02 Add Contact Screen

3. Enter the contact information the press the **Back Arrow** at the top-left of the screen (as indicated in Figure 02 above) to return to the **Contacts** screen.

Edit Contacts

1. Press and hold the contact you want to edit. A **Select Option** pop-up menu is displayed as illustrated in Figure 03 below.

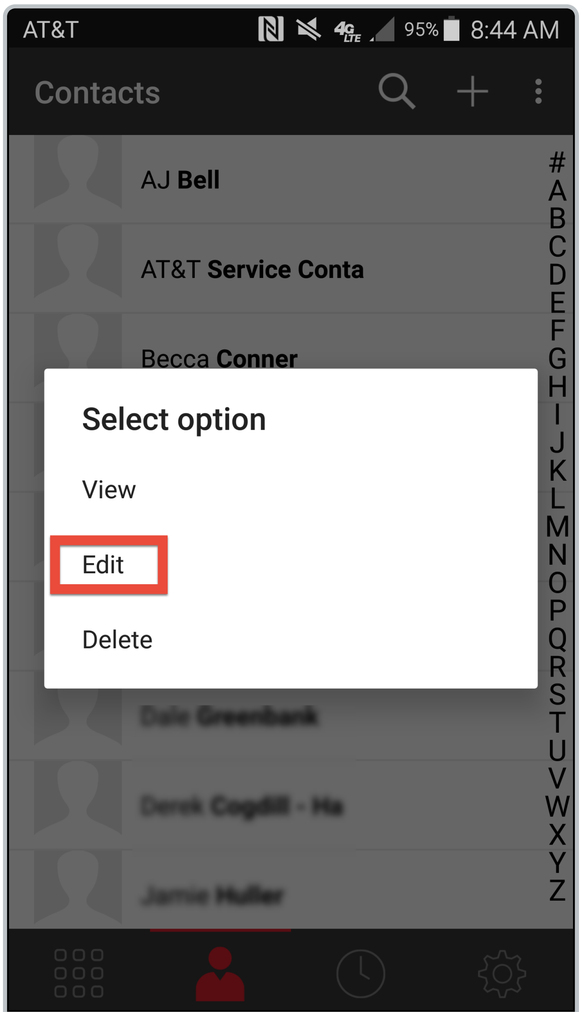


Figure 03 Edit Contact Select Option Pop-Up Menu

2. Press the **Edit** option (as illustrated in Figure 03 above) to display the **Edit Contact** screen as illustrated in Figure 04 below.

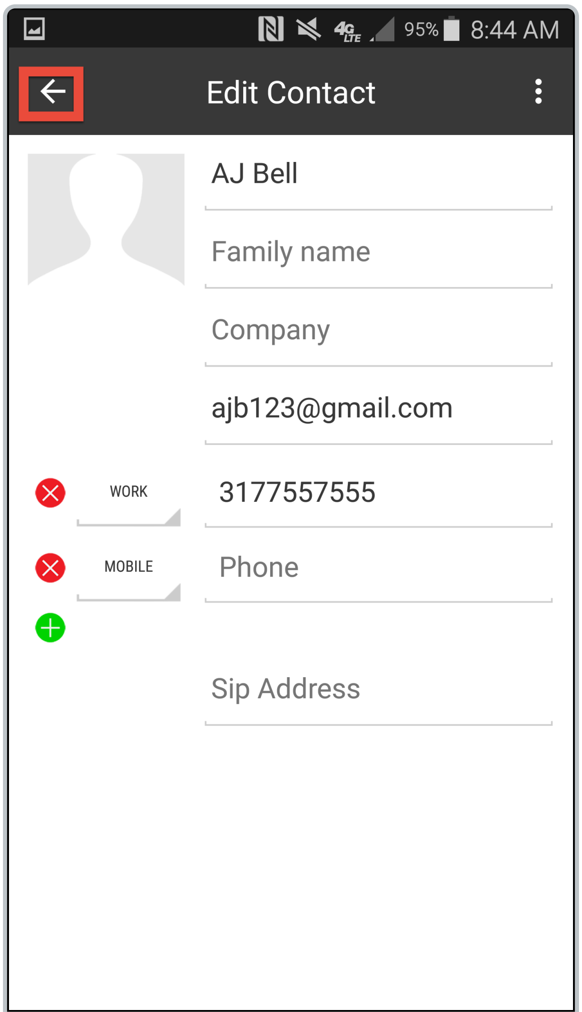


Figure 04 Edit Contact Screen

3. Once you've made your edits press the **Back Arrow** in the upper-left corner of the screen as illustrated in Figure 04 above.

Delete Contacts

1. Press and hold the contact you want to edit. A **Select Option** pop-up menu is displayed as illustrated in Figure 05 below.

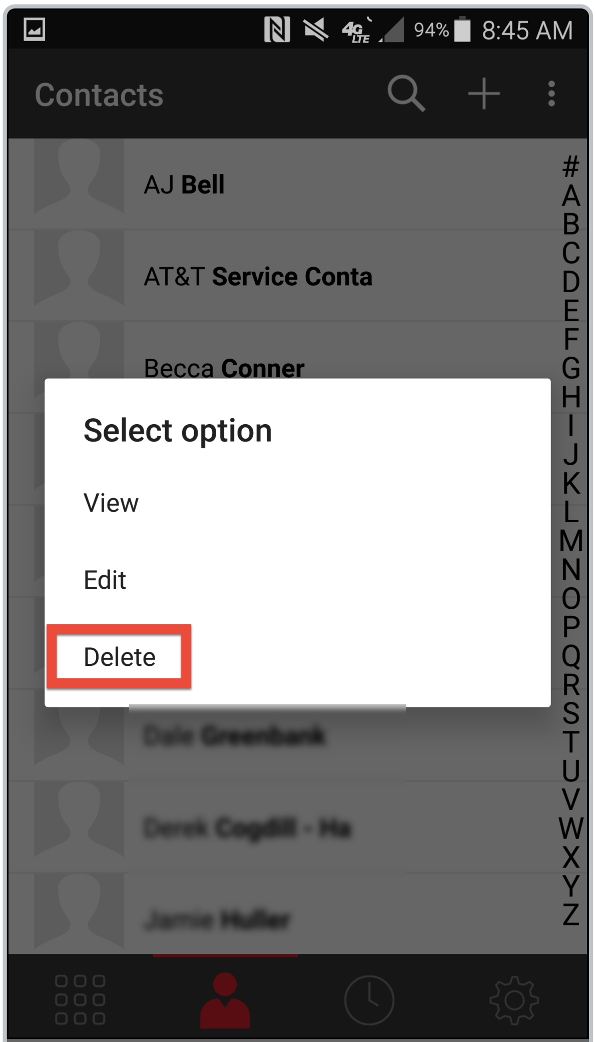


Figure 05 Delete Contact Select Option Pop-Up Menu

2. Press the **Delete** option to begin the deletion process. This displays the **Delete Confirmation** pop-up message as illustrated in Figure 06 below.

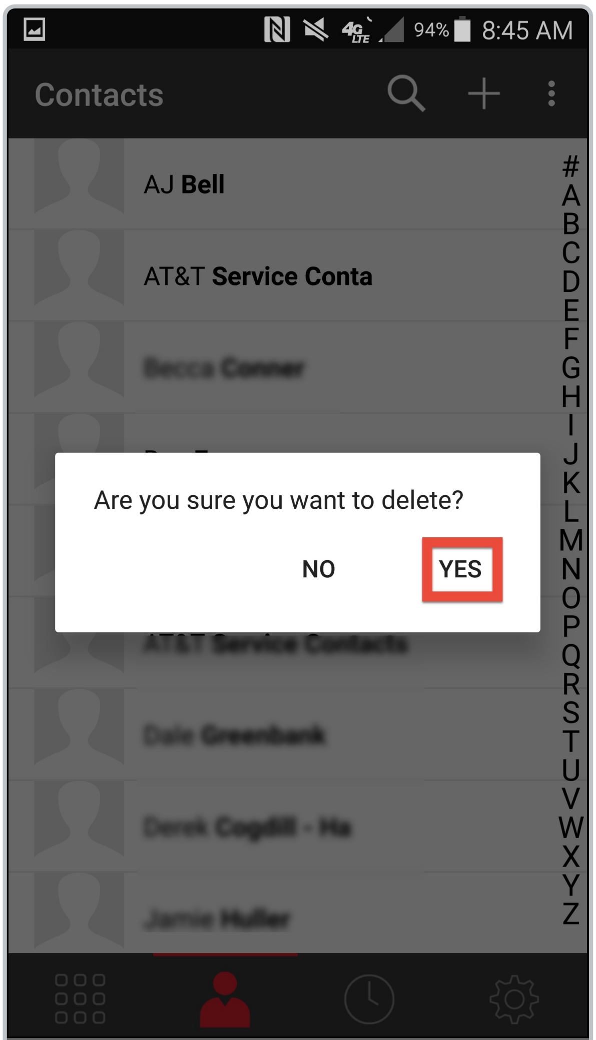


Figure 06 Delete Confirmation Pop-Up Message

3. Press the **Yes** button to complete the deletion.

Contact Fields in Bolt for Windows vs. Android Devices

Last Modified on 07/25/2018 9:00 am EDT

Contact fields in Bolt for Windows and Android devices' Contact fields in are not the same. Android devices have extraneous fields that are not included in Bolt fo Windows. This article clarifies what fields are available for Contacts in Bolt versus what Android devices' Contact fields are available.

Some fields can be updated in Bolt for Windows’ Contacts or in the Android devices' contacts. These fields include:

- First name / Given name
- Last name
- Company
- Photo
- Softphone
- Phone
- Email

There are some fields that can only be updated through the Android devices' contacts app. Not all of these fields will appear in Bolt for Windows. These fields include:

- Name Prefix
- Middle Name
- Name Suffix
- Phonetic Name
- Nickname
- Title
- Address
- Instant Message
- Website
- Date (Birthday, Anniversary, Other, Custom)
- Relationship
- Notes

- Label

NOTE:	

Bolt Application Hot Keys

Last Modified on 07/23/2018 8:16 am EDT

Category	Function	Keyboard Shortcut
Making or answering a call	Answer an incoming call	Ctrl + N
	Decline an incoming call	Ctrl + D
	Redial the last dialed number	Ctrl + R or Ctrl + R then Enter
	End the call End the conference call (hang up on all participants)	Ctrl + E
During a call	Mute your voice during a call	Ctrl + M
	Hold or resume the call when the focus is on this call panel	Ctrl + H
	Transfer an established call when the focus is on this call panel	Ctrl + T
	Turn volume up when the focus is on this call panel	Up key
	Turn volume down when the focus is on this call panel	Down key

	Display in full screen when the focus is on the video window	F11
During a screen share session	Bring the screen share window to the front and in focus	Shift + Ctrl + Alt + S
Opening a window	Open the Messages window	Shift + Ctrl + M
	Open the Preferences window	F8
	Open Troubleshooting Diagnostics	Ctrl + F9
	Open Help in a browser	F1
Exiting	Quit Bolt	Ctrl + Q

Quick Reference for Bolt for Android Devices Preferences

Last Modified on 04/04/2019 9:48 am EDT

To view and/or edit your **Preferences** in Bolt for Android devices press the **Settings** button at the bottom-right of the screen.

NOTE:	The status in Bolt is not currently synchronized with your Presence status. This is on the development roadmap.

Preference settings are defined in Table 01 below.

Field	**Description**
Mobile data network	
Use When Available	• ON: Softphone provider attempts to connect to SIP/XMPP services using the mobile data network when a Wi-Fi connection is not available. You receive messages and voice mail notifications when Softphone provider is in the mobile data network. • OFF: If a Wi-Fi connection is not available, SIP and XMPP services are unregistered; you will not receive any messages or notifications and will not be able to place or receive calls. Data charges with your mobile carrier may apply.

Allow VoIP Calls	Appears when Settings > Preferences > Use When Available is ON. • ON: Softphone provider attempts to place calls using the mobile data channel when a Wi-Fi connection is not available. Voice quality may be impacted as mobile data is not ideal for voice calls. G.729 codec is recommended for better audio quality on mobile data calls (3G/4G/LTE). • OFF: If a Wi-Fi connection is not available, you will not be able to place or receive calls. Data charges with your mobile carrier apply.
Incoming call	
Play Ringtone	• ON: Your Android device plays a ringtone for incoming calls. • OFF: Your Android device does not play a ringtone for incoming calls.
Vibrate	• ON: Your Android device vibrates when you receive a call. • OFF: Your Android device does not vibrate when you receive a call.

Contact Image	Changes the way Softphone provider displays the image of a contact during a call when you have added an image to a contact in the Contact tab of the resource panel. Make sure your images are smaller in size so they display faster. • ON: Softphone provider shows an image of the remote party during a call. • OFF: Softphone provider does not show an image of the remote party during a call.
Ringtone	Select the ringtone that will be used for incoming calls.
Call Heads	• ON: Tap on Call Heads from any screen on your Android device to go back to the call screen or end a call. • OFF: Call Heads are not available.
Decline Options	Tap to set up Quick Responses and Call Reminders
Quick Response	A list of pre-defined IMs that can be used when you decline a call from an XMPP Buddy on the same XMPP server. Create, edit, and delete Quick Responses.
Call reminder	
Enable Call Reminder	• ON: Softphone provider will ask if you want a call reminder to be set when you decline a call. • OFF: Softphone provider will not set a call reminder.

Call Reminder Delay	Set the interval between the declined call and the call reminder. • 5 minutes • 15 minutes • 30 minutes • 1 hour • 3 hours • Tomorrow
Custom colors	
Select Your Colors	Change the color for various parts of the screen and tap Apply Colors. Tap Reset Colors to easily return to the default settings.
messaging	
Enable IM and Presence	This is a premium feature and only appears when Presence and Messaging has been purchased. • ON: Softphone provider can be used for sending instant messages and sharing online status. To use IM and Presence on a SIP account, Settings > Accounts (SIP) > Account Specific Features > Enable IM and Presence must be ON. • OFF: You will not be able to use SIP or XMPP accounts for presence and messaging.

Enable SMS	This is a premium feature and only appears when Presence and Messaging has been purchased. • ON: Softphone provider can be used for sending SMS messages to PSTN numbers. To use SMS on a SIP account, Settings > Accounts (SIP) > Account Specific Features > Enable SMS must be ON. • OFF (default): You will not be able to use a SIP account for sending SMS.
Alert Sound	• ON: Your Android device plays a ringtone when you receive a new message. • OFF: Your Android device does not play a ringtone when you receive a new message.
Alert Vibration	• ON: Your Android device vibrates when you receive a new message. • OFF: Your Android device does not vibrate when you receive a new message.
Alert Text Tone	Select the ringtone for incoming messages.
Call in progress	
Auto Record Calls	• ON: Softphone provider automatically record all calls made. • OFF (default): Softphone provider records a call only if you tap Start Recording during a call.

Play Music On Hold	This setting controls music played locally by Softphone provider. If your VoIP service provider has the ability to play music on the server side, turning this setting OFF will not turn off the music if it is being played by your VoIP service provider. • ON: Play classical music to party on hold. All the participants hear music if it is a conference call. • OFF: Default
Use proximity sensor	Turn this OFF only if you encounter difficulties on your device. • ON: Softphone provider uses the proximity sensor for the device.
Phone number	
Single Touch to Call	When IM, SMS and/or video are enabled, this setting is ignored. Softphone provider displays a prompt to choose an option. • ON: When making a call from Contacts or History, the call is placed when you tap a phone number. • OFF: When you tap the phone number, a prompt appears. Tap the prompt to place the call.
Show URI Domain	ON: The phone number displayed for an incoming, outgoing, or established call includes the domain name (for example, 1234@myVoipProvider.com). OFF (default): The domain name is not displayed.
client-side call forwarding	

Forward Calls	• When ON, Softphone provider sends all incoming calls to a specific number when enabled and registered. Settings > Preferences > Keep Wi-Fi Radio Awake must be ON as well.
To Number	Appears when Settings > Preferences > Forward Calls in ON. Enter the number to forward calls to.
Additional	
Keep Wi-Fi Radio Awake	Controls whether the Wi-Fi radio stays on when the screen goes black (phone gets auto locked). • ON (checked): Wi-Fi radio stays on. When the screen goes black: (1) you stay logged on via Wi-Fi (if you are in your Wi-Fi network), and (2) incoming calls use Wi-Fi instead of mobile data. Radio On uses more battery power. Choose ON if you have a limited data plan. • OFF: Wi-Fi radio is turned off. When the screen goes black: (1) Softphone provider re-logs in via the mobile data network, and (2) incoming calls use your mobile data plan. If mobile data is not enabled on your phone and/or in softphone, the provider logs out and you will not receive calls as long as the phone is dark. Radio Off uses less battery power. Choose OFF if you have an unlimited data plan.

Auto Start on Boot	• ON: Automatically start and log into Softphone provider when you start your Android device. Even if Softphone provider was logged out when you powered off the phone, softphone will start and log in when the phone starts.
Show All Contacts	• ON: Softphone provider will display all device contacts regardless of native contacts group membership.
Contact Sort Order	Change your contact sort order preference. • First Name: Sorts contacts based on their first name. • Last Name: Sorts contacts based on their last name. This setting becomes available/changeable when Softphone provider cannot access the preferences on the Android OS. If this setting is read-only in softphone, go to the Android device settings (such as the Contacts app) and change the sort preference.
Contact Display Order	Change your contact display preference in your Contacts and Buddies lists. • First Name First: Displays a contact name as “John Smith”. • Last Name First: Displays as “Smith, John”. This setting becomes available/changeable when Softphone provider cannot access the preferences on the Android OS. If this setting is read-only in softphone, go to the Android device settings (such as the Contacts app) and change the display preference.

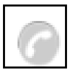
Use Phonetic Sorting	• ON: Sort contacts by phonetic names such as "Yomigana"/"Furigana" or "Pinyin". Enabling this preference will slow contact loading. • OFF: Default When contact names include Japanese or Chinese characters and the names do not appear correctly on Softphone provider, enabling this preference may solve the problem.
Use LED Notifications	• ON: Turns on the pulse notification light on supported devices. When Softphone provider has a new IM/SMS or a missed call, the notification light will blink. • OFF: Does not turn on the pulse notification light.
Video calls	
Enable Video	Making and receiving video calls is a premium feature and only appears when Video Calls has been purchased. • ON: Bolt can be used for video calls. To place Video Calls, Settings > Accounts (SIP) > Account Specific Features > Enable Video must be ON. • OFF: You will not be able to make and receive video calls on Softphone provider.
Send Landscape	Appears when Settings > Preferences > Enable Video is ON. • ON: Video will be forcibly sent in the landscape orientation. This is a compatibility mode for older devices that cannot render video in the portrait orientation. Turn on only when it is necessary. • OFF: Default

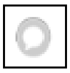
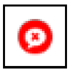
Video Quality	Appears when Settings > Preferences > Enable Video is ON. Choose video quality for video calls. • Automatic (Recommended): Softphone provider selects the best quality to use in a given situation. • Low (QCIF): Quarter Common Intermediate Format uses 176 horizontal pixels and 144 vertical lines. QCIF transfers one-fourth the amount of data and consumes less memory the CIF. • Standard (CIF) • High (VGA) • HD (720p VP9 only)

Quick Reference for Account Status in Bolt for Android Devices

Last Modified on 08/09/2018 10:21 am EDT

NOTE:	The status in Bolt is not currently synchronized with your Presence status. This is on the development roadmap.

Status	Account Type	Means that...
	SIP	The account is in the process of registering.
	SIP	The account is registered and can be used to make and receive phone calls.
	SIP	The account is registered and can only be used to make phone calls. Accounts > Account Advanced > Incoming Calls is OFF.
	SIP	The account is disabled. Toggle the account switch to ON to register the account.
	SIP	The account in enabled but registration failed. Check that you entered your account credentials correctly.
	XMPP	The account is in the process of registering.
	XMPP	The account is registered and can be used for Presence and Messaging.

	XMPP	The account is disabled. Toggle the account switch to ON to register the account.
	XMPP	The account is enabled but registration failed. Check that you entered your account credentials correctly.

Accessing and Managing Voicemail in Bolt for Mac

Last Modified on 08/01/2018 5:20 pm EDT

Bolt allows a user to save, delete, categorize, and listen to voicemails.

Bolt displays the number of new voicemails next to the voicemail icon as indicated in Figure 01 below.

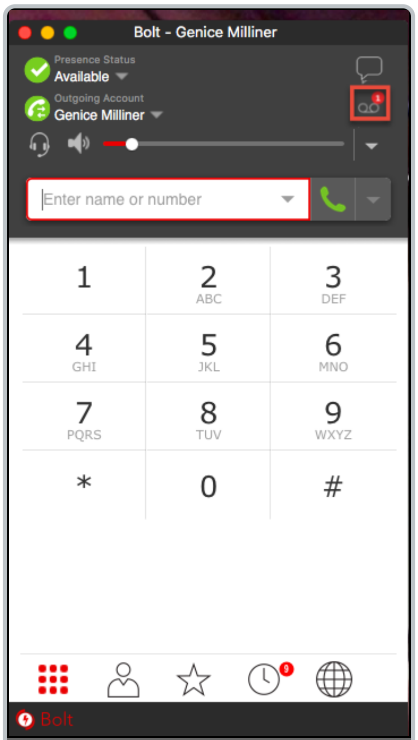


Figure 01 Voicemail Indicator

Click the voicemail icon to open your voicemail and login (as indicated in Figure 02 below). When the **Password** screen is displayed the system requests you enter your password.

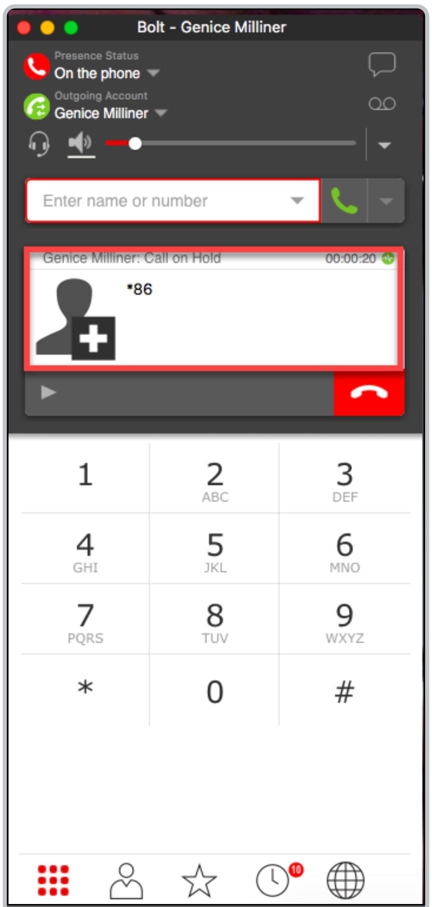


Figure 02 Password Screen

Enter your PIN (Personal Identification Number) and wait for Bolt's response. Voicemail will walk you through listening to messages, saving messages, forwarding messages, and deleting messages.

Call History in Bolt for Mac

Last Modified on 08/07/2018 10:36 am EDT

Bolt makes it easy to see a call history so you can review what calls you've made, received, and missed.

NOTE:	Bolt call history is local to that instance of Bolt. Kerauno will contain the call history for the user across all devices. Deleting a call record in Bolt will not delete the record in Kerauno.

View Call History

To view your call history in Bolt select the **Call History** icon, the clock, at the bottom of the screen as illustrated in Figure 01 below.

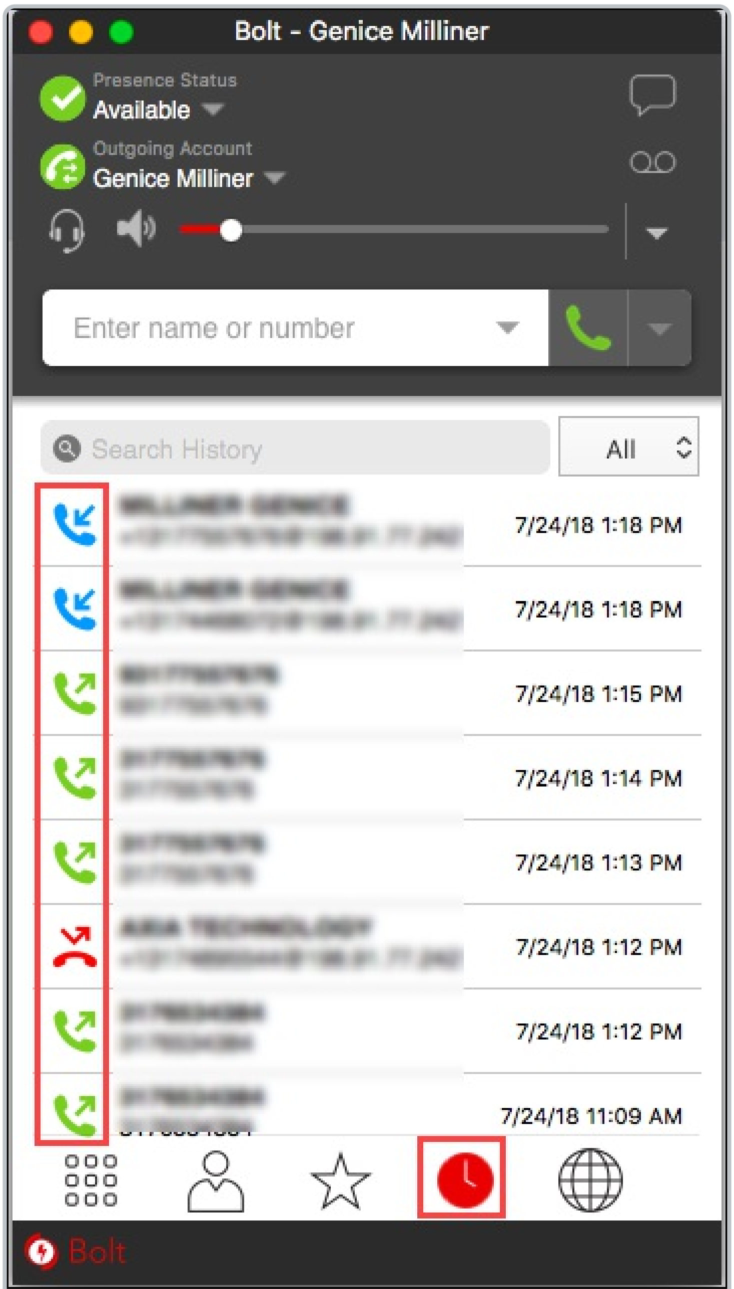


Figure 01 Call History Button

When you select the **Call Historty** icon your **Call History** is displayed.

The calls are listed in date order from newest to oldest. **Call Indicator** icons to the left of each call indicates the type of call (incoming, outgoing, or missed) as illustrated in Figure 01 above. Table 01 below details what each **Call Indicator** icon means.

Call Indicator Icon	Indicates
	Indicates an outgoing call, either attempted or established.

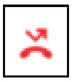
	Indicates an incoming call that was answered.
	Indicates a missed incoming call.

Table 01 Bolt Call Indicator Icon Descriptions

The default display shows all call types. To change the display, select the down arrow to the right of the **Search** field as indicated in Figure 02 below.

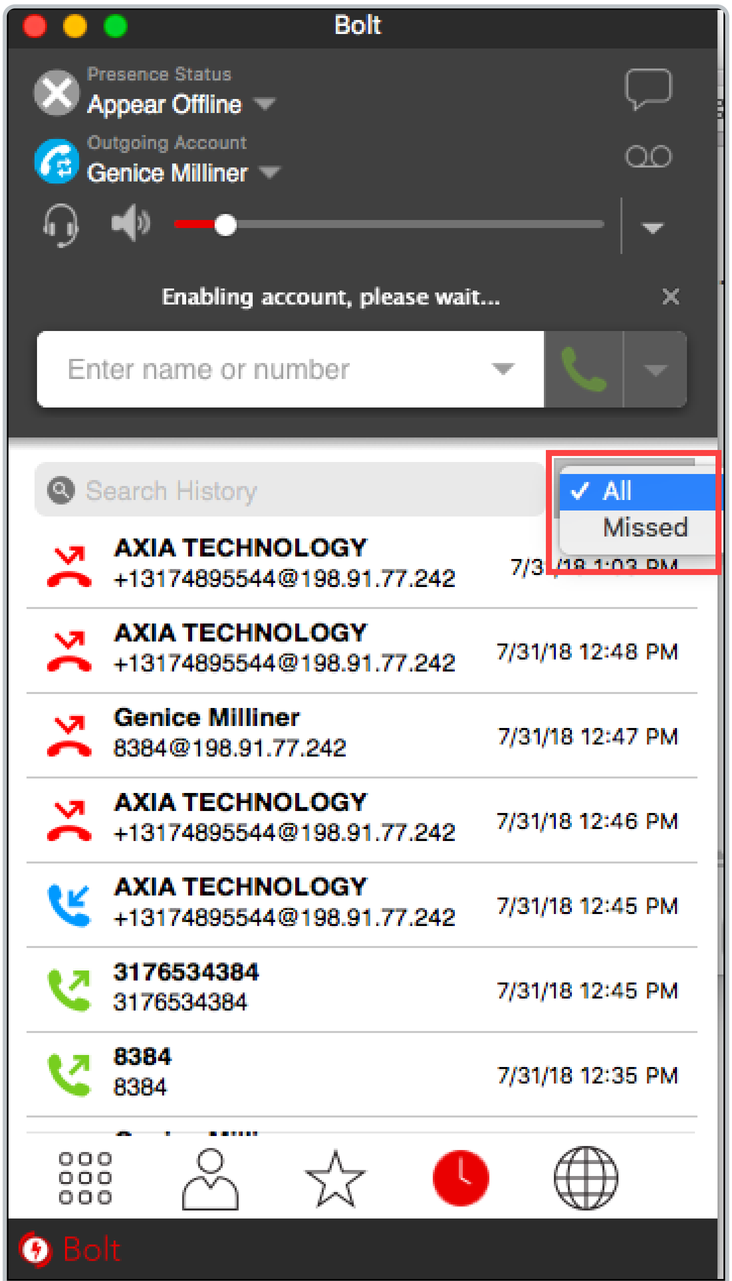


Figure 02 Call History - Call Type

Select **All** (default) or **Missed** from the drop-down list. Select any call on the list to display details about the call.

Place a Call from Call History

To place a call from Call History select the **Call History** icon, the clock, at the bottom of the screen. Select the listing you want to place the call to; a shortcut menu is displayed as illustrated in Figure 03 below.

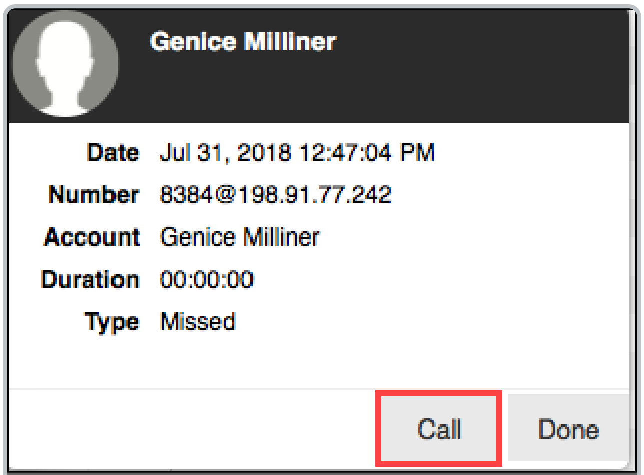


Figure 03 Place Call from Call History

Select the **Call** button in the lower-right corner to place the call.

Delete Calls from Call History

Using **Call History**, you can delete an individual call or all calls. To delete calls, right-click the call you want to delete; a shortcut menu is displayed as illustrated in Figure 04 below.

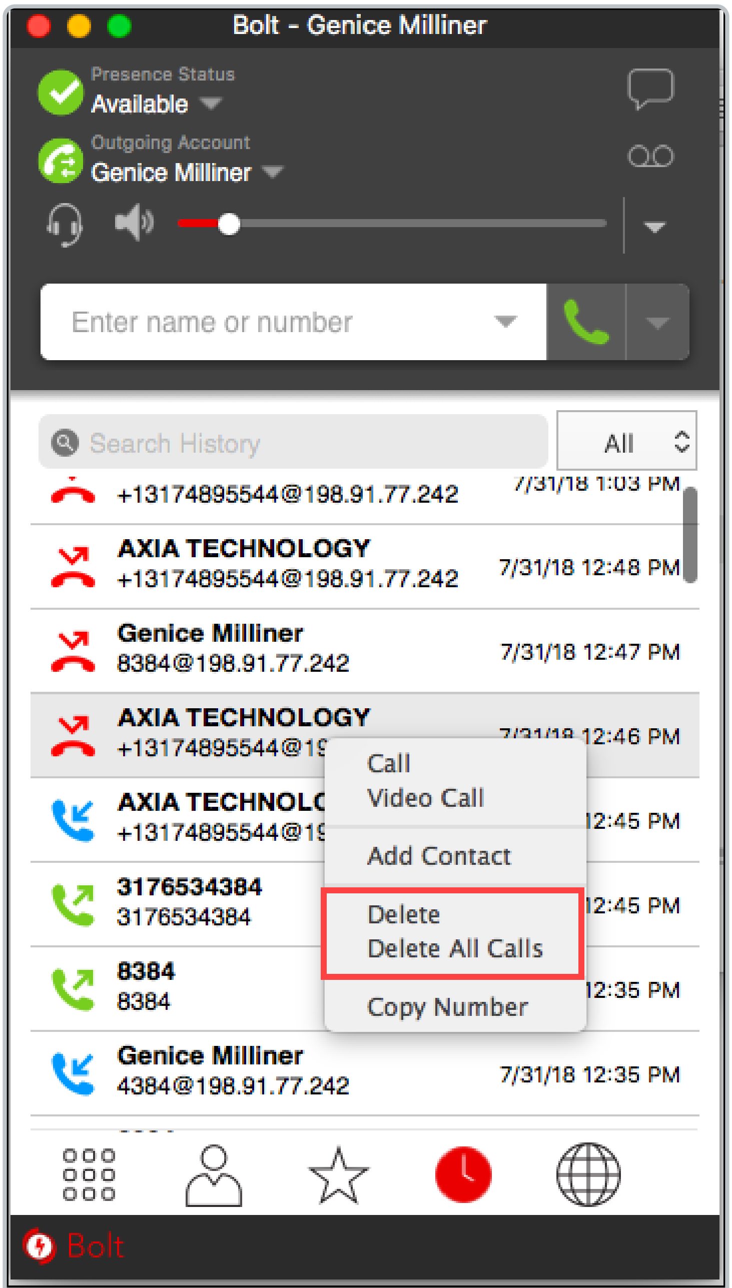


Figure 04 Shortcut Menu - Delete Options

Select **Delete** from the shortcut menu to remove the individually selected call from your **Call History**. Select **Delete All Calls** to remove all calls from your **Call History**.

Login/Logout in Bolt for Mac

Last Modified on 07/25/2018 8:56 am EDT

This article discusses how to launch and login to Bolt, quit Bolt, and exit Bolt.

Launch and Login to Bolt for Mac

Double-click the Bolt icon to launch the Bolt application. When the **Login** screen is displayed, enter your **User ID** and **Password**.

Note: the User ID and Password are unique to the Bolt phone. They are not the same as your Kerauno account.

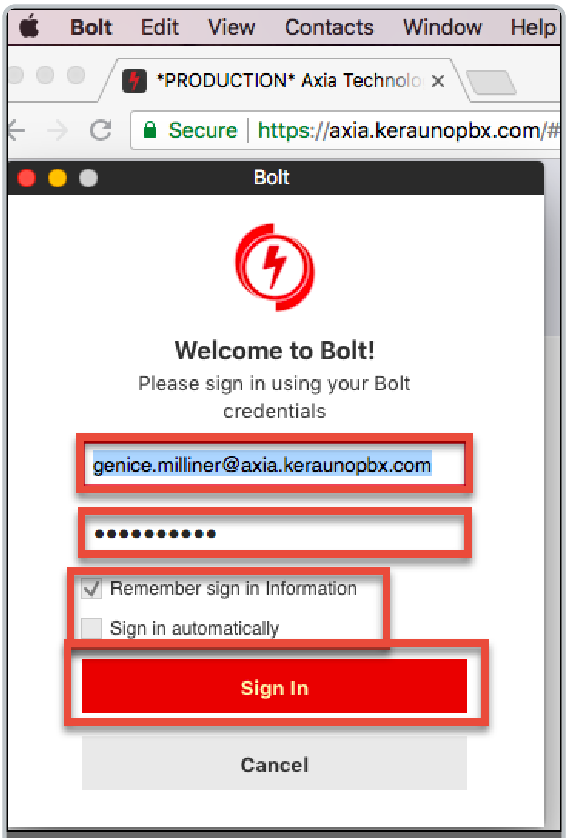


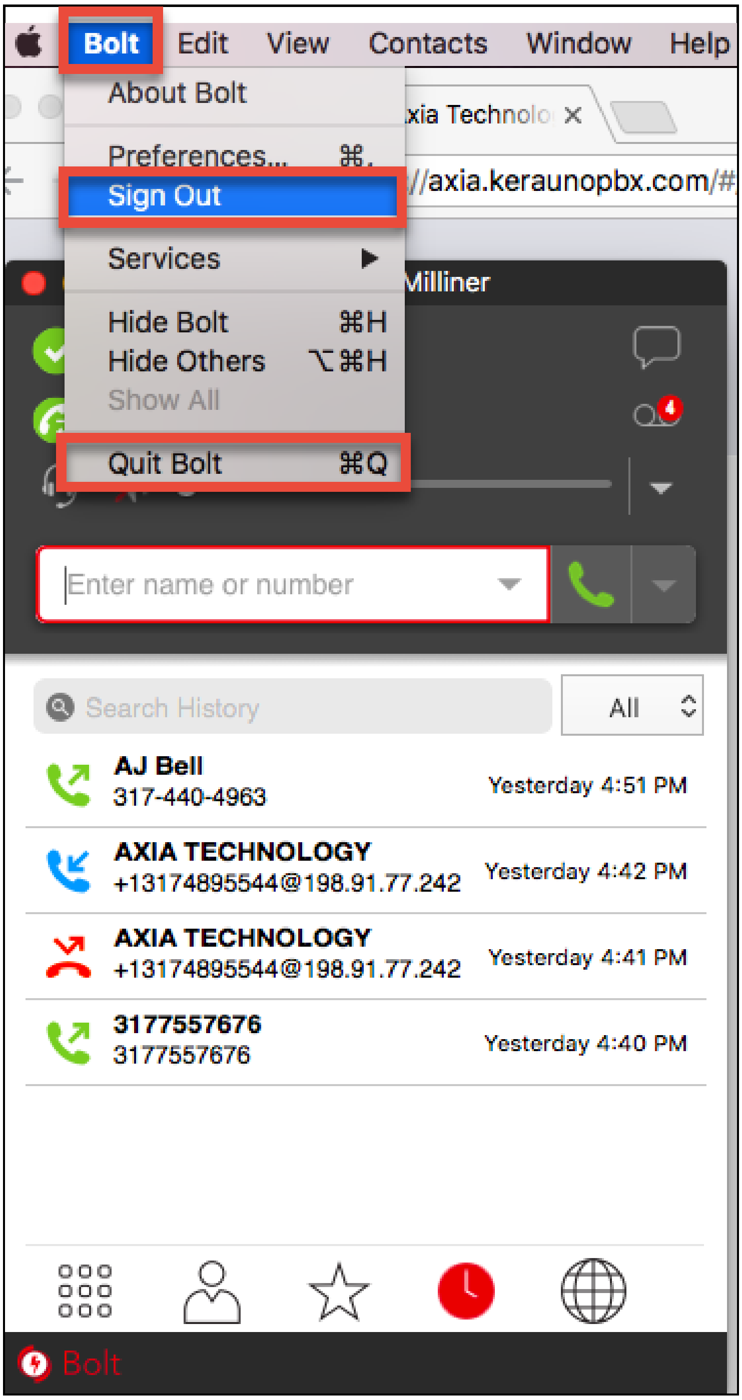
Figure 01 Login Screen

You can click the **Remember Sign in Information** checkbox to select/deselect it. Selecting this checkbox means the sytem will "remember" your **User ID** and **Password** so you don't have to type them in each time.

Select the **Sign in Automatically** checkbox to skip the **Login** screen and automatically sign into Bolt when the application is launched.

Quit/Logout of Bolt for Mac

To quit Bolt, select **Softphone > Quit** as illustrated in Figure 02 below. This closes the application but leaves you signed in.



To logout of of Bolt for Mac, select **Softphone > Sign Out** as illustrated in Figure 01 above. This completely signs you of the application.

Managing Contacts in Bolt for Mac

Last Modified on 08/07/2018 10:37 am EDT

NOTE:	Bolt contacts are local to that instance of Bolt. Kerauno will contain the contacts for the user across all devices. Deleting a contact in Bolt will not delete the record in Kerauno (refer to the Important differences between Bolt and Kerauno Presence article for more information).

Your contacts can be easily managed in Bolt. You can add, edit, and delete contacts from your list as well as search and sort your contacts.

Contacts Tab

The **Contacts** tab displays your contacts. Each contact is shown with an icon for single-click phoning.

NOTE:	If the **Contacts** tab is not showing, select **View > Show Contacts** from the **Main Menu**.

Contacts can be arranged into groups for organization. Bolt has several built-in groups; you can add your own custom groups as well.

To view your contacts list select the **Contacts** icon at the bottom of the screen as indicated in Figure 01 below.

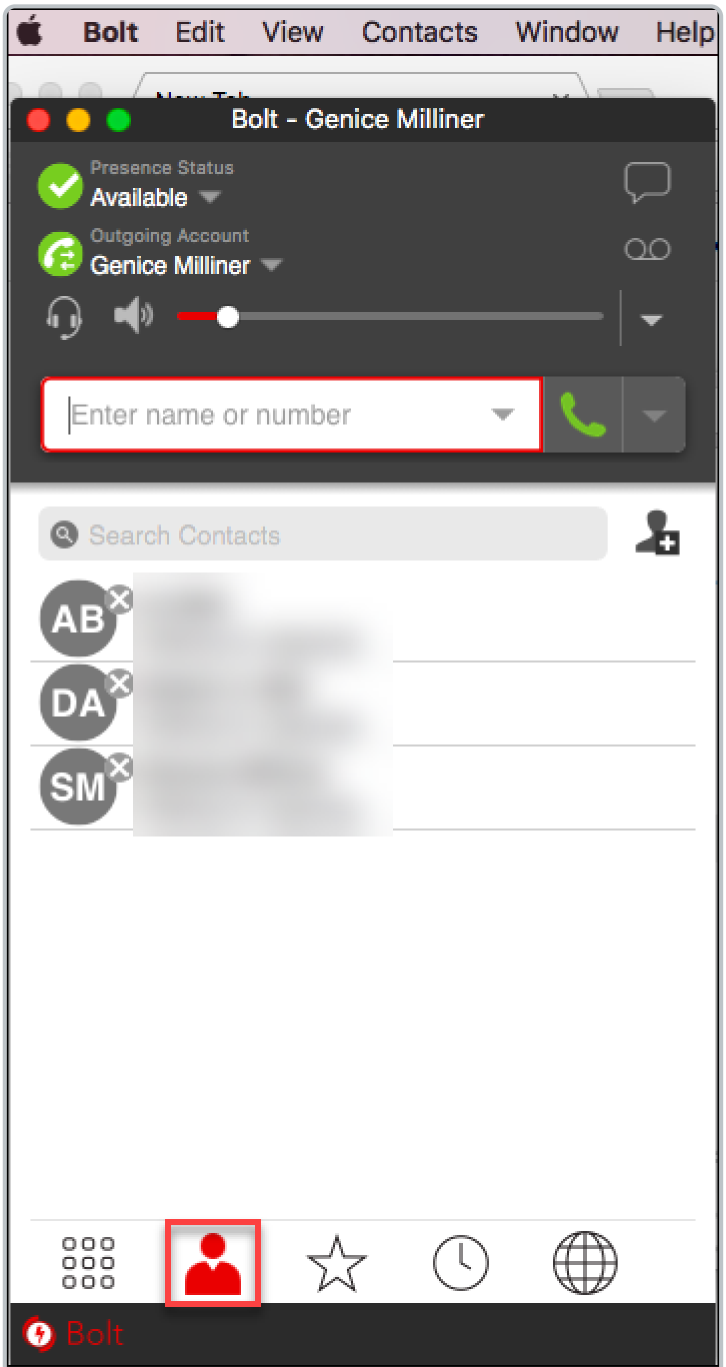


Figure 01 Contacts Button

You can change the detail and layout of your contacts from the **Contacts** menu (refer to Figure 02 below).

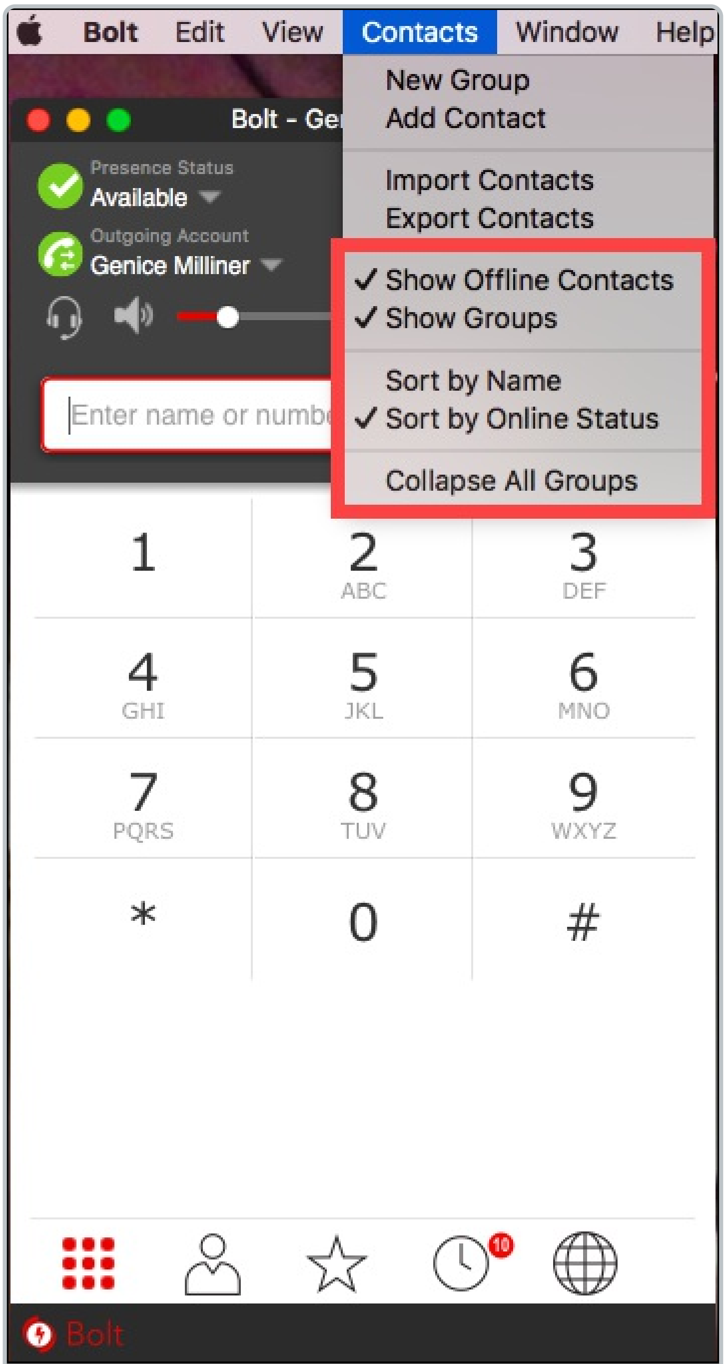


Figure 02 Contacts Menu

From the **Contacts** menu you can show offline contacts and groups; sort by name or online status; and collapse all groups so contacts display all in one list (refer to Figure 02 above).

With the **Contacts** tab displayed you can select a contact then select the **Phone** icon to call the selected contact (refer to Figure 03 below).

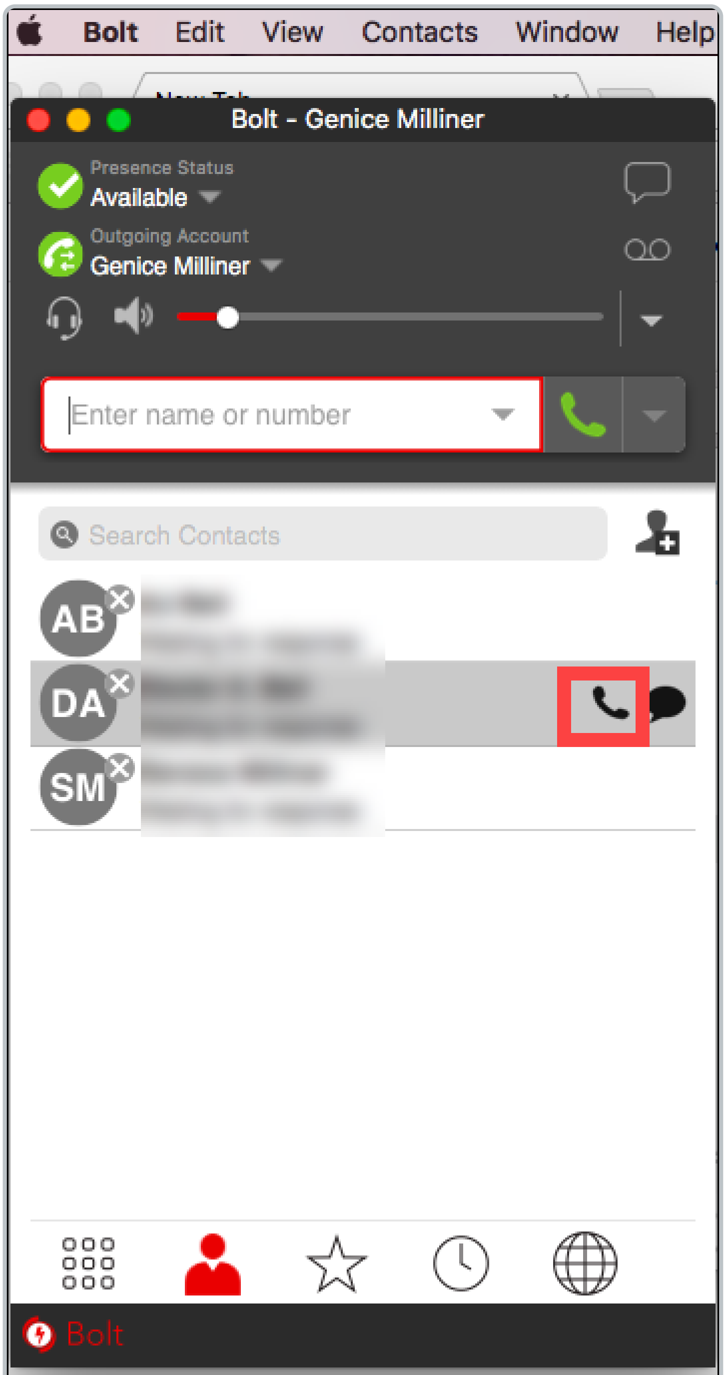


Figure 03 Contacts Scree - Call Icon

Editing a Contact

From the Bolt **Contacts** screen, click the contact you want to edit to display a pop-up dialog box as illustrated in Figure 04 below.

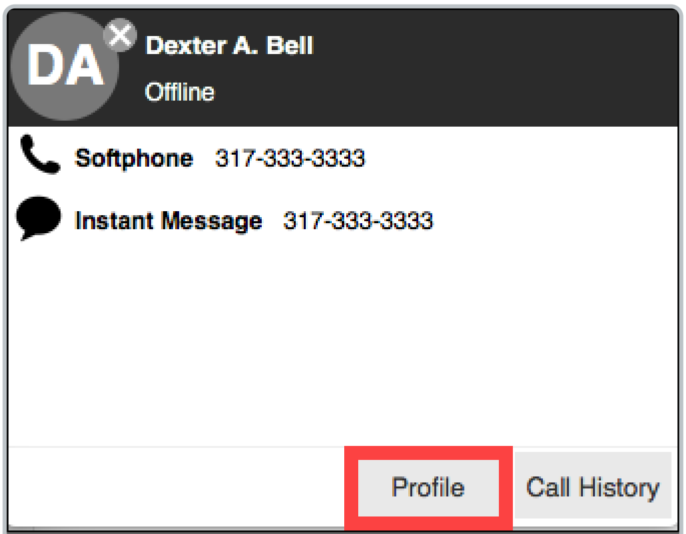


Figure 04 Contact Pop-Up Dialog Box

Select the **Profile** button in the lower-right corner to display the **Contact Summary** screen for the selected contact as indicated in Figure 05 below.

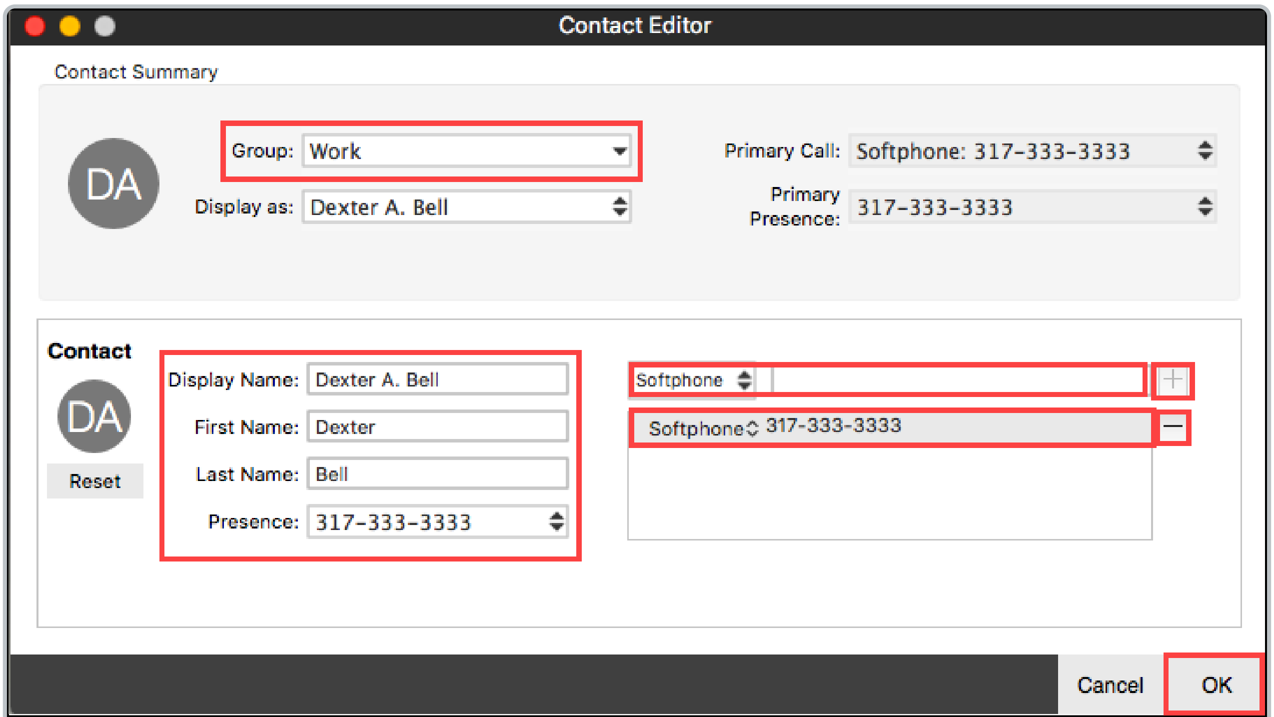


Figure 05 Contact Summary Screen

Make the necessary changes then select the **OK** button to save your changes.

Adding a Contact

There are multiple ways to add new contacts. First, contacts can be added using the **Add a new contact** button from the **List of contacts** screen, from the **Contacts** menu, or from the **Contact History** screen.

To add a contact via the **List of contacts** screen select the **Add a new contact** button as illustrated in Figure 06 below.

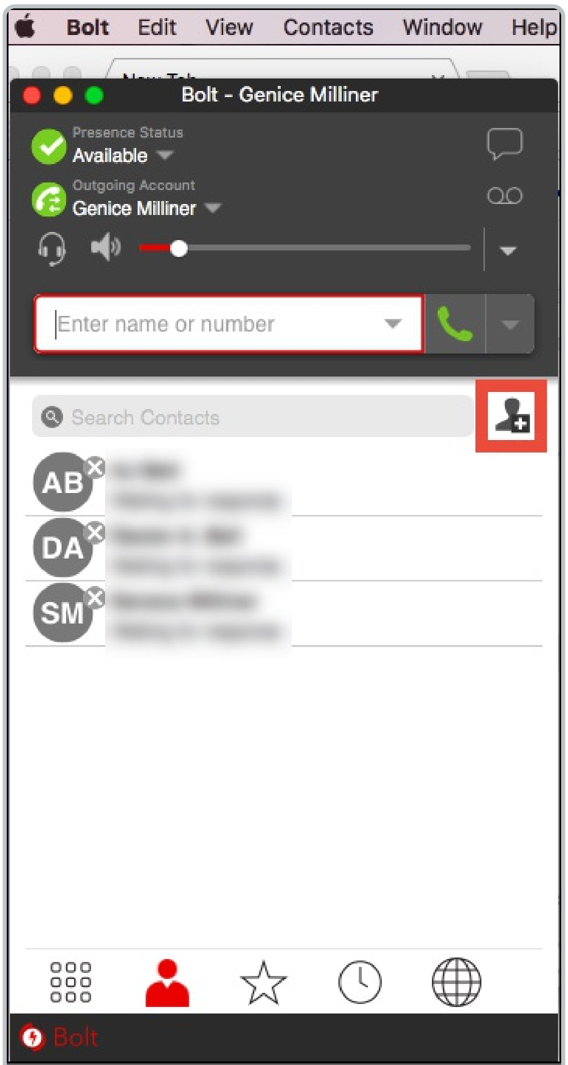


Figure 06 Add New Contact Button

The **Contact Editor** screen is displayed as illustrated in Figure 07 below.

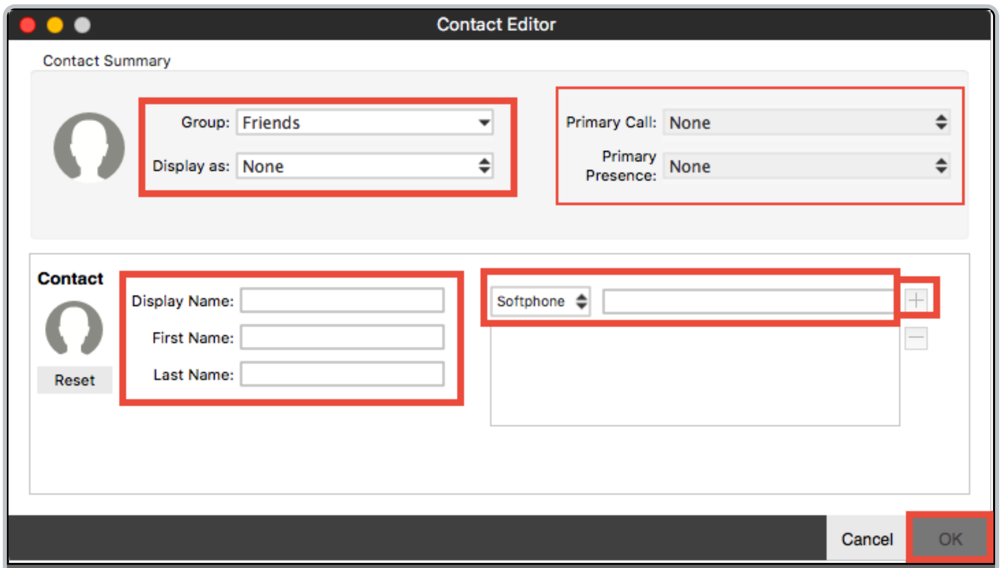


Figure 07 Contact Editor Screen

Select the appropriate **Group** from the drop-down list as illustrated in Figure 08 below.

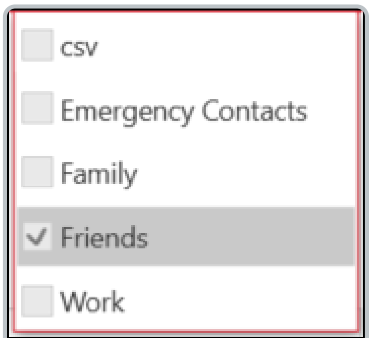


Figure 08 Contact Group Drop-Down

Enter data in the following fields:

- **Display Name** (usually first and last name): This is the contact's name which displays in the Bolt phone book. This is a required field.
- **First Name**: The contact's first name.
- **Last Name**: The contact's last name.

Select the **Location** for the phone number as indicated in Figure 09 below.

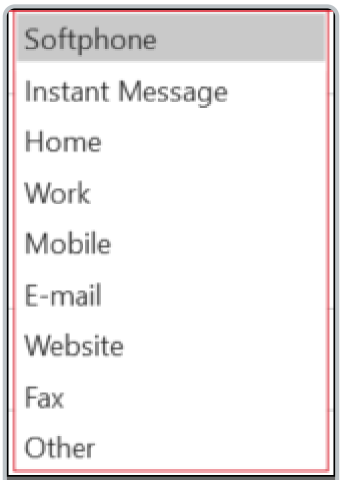


Figure 09 Location Drop-Down List

Enter the contact's phone number in the field to the right of the **Location** drop-down. Then, select the **Add** button to add the contact number.

NOTE:	Multiple numbers can be entered for a contact (e.g., work, mobile, fax, etc.).

Select the **OK** button to save your changes.

You can also select **Contacts** from the main menu then select **Add Contact** (as illustrated in Figure 10 below) to display the **Contact Profile** screen.

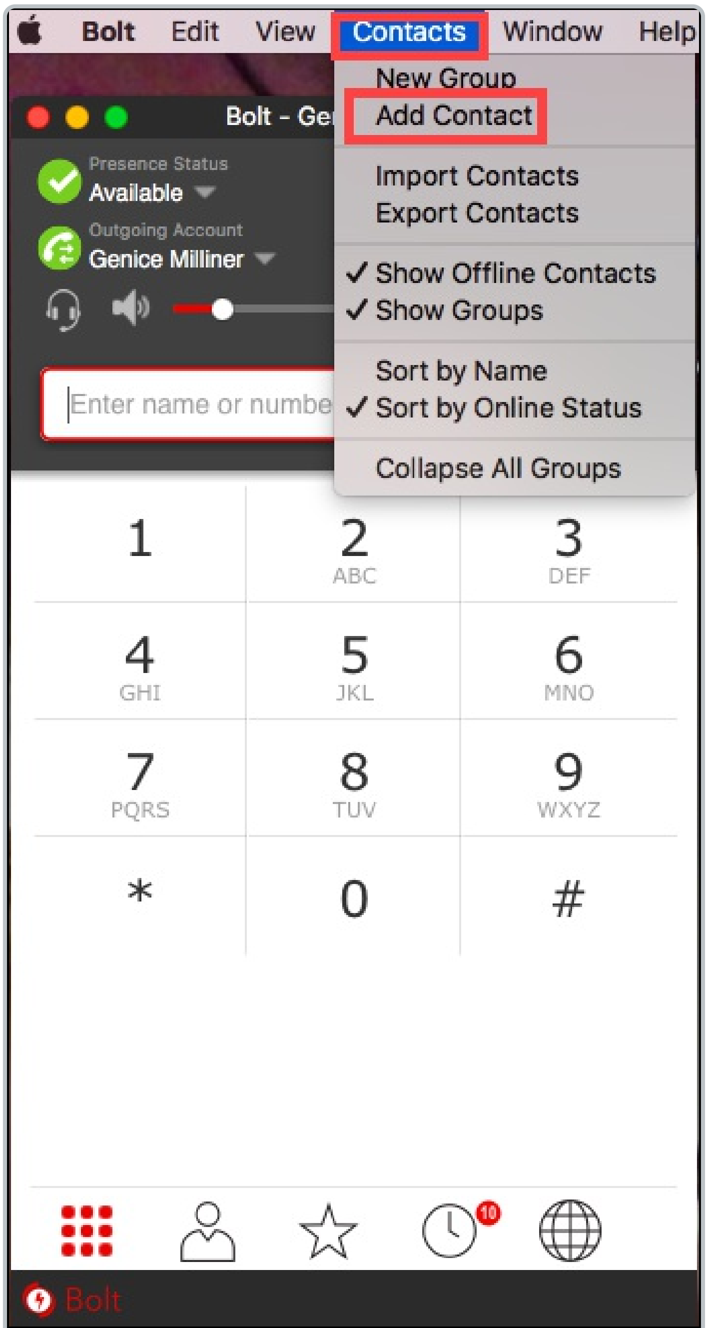


Figure 10 Contact Menu - Add Contact

Import Contacts

To import existing contacts to Bolt you will first need to create an Excel file to use for importing the contact data.

1. Remove any extraneous or introductory text or headings from the top of the file. (You can keep text at the end of the file; it will be ignored during the import.)
2. Insert a blank row as the first row, then insert the headings that Bolt will use to interpret the meaning of each column.
    1. sip-address. Bria recognizes a value in this column as a softphone address

and considers the address as one that can be phoned and as an address that can be used for IM/presence (if SIP is being used for IM/presence).

2. xmpp-address: Bria recognizes a value in this field as a Jabber (XMPP) address and will map this field to the Jabber contact method for the contact. Bria considers a Jabber address as one that can be used for IM/presence (if XMPP is being used for IM/presence).
3. display-name, given_name, surname
4. business number
5. presence_subscription. Complete this column in one of these ways:
   1. If you only want to share presence information with some of your contacts, fill in this column in the file. Enter “true” for contacts whose online presence you want to see, leave blank or enter “false” for others. During the import, you will be able to choose to share presence with only these contacts. Bria will subscribe to the presence of these “true” contacts, assuming that the user has a SIP (if using SIP for presence) or an XMPP address.
   2. If you want to share presence with all your contacts (or with none), ignore this heading. During the import you will be able to choose to share with all (or none) of your contacts

3. Save the file as a CSV file.

In Table 01 below is a list of all the headings that are used in the Bolt contact list. This list can be useful when formatting a contact list in order to import it into Bolt.

Heading	**Description**
business_number	
business_numbern, where n is 2 to 6	

Heading	Description
categories	Maps to Bria groups
default_address	Maps to the Presence field
default_address_comm	Always specifies IM, if default_address is specified. This heading does not map to a Contact Profile field
default_address_type	Specifies SIP or XMPP
display-name	
email_address	
email_addressn, where n is 2 to 6	
fax_number	
fax_numbern, where n is 2 to 6	
given_name	
home_number	
home_numbern, where n is 2 to 6	

Heading	Description
mobile_number	
mobile_numbern, where n is 2 to 6	
other_address	
other_addressn, where n is 2 to 6	
postal_address	
presence_subscription	TRUE or FALSE
sip_address	Maps to the Softphone field.
sip_addressn, where n is 2 to 6	
surname	
web_page	
web_pagen, where n is 2 to 6	

Heading	Description
xmpp_address	Maps to the Instant Message field. This field must always specify an XMPP address
xmpp_addressn, where n is 2 to 6	

To complete the import:

1. From the main menu choose **Contacts > Import Contacts**. The **Import Contacts** wizard is launched.
2. Follow the instructions in the wizard.
3. As soon as you click **Finish** on the wizard, the Contacts tab is updated to show the imported entries.

Delete a Contact

To delete a Contact, right-click the contact you want to remove to display a shortcut menu as illustrated in Figure 11 below.

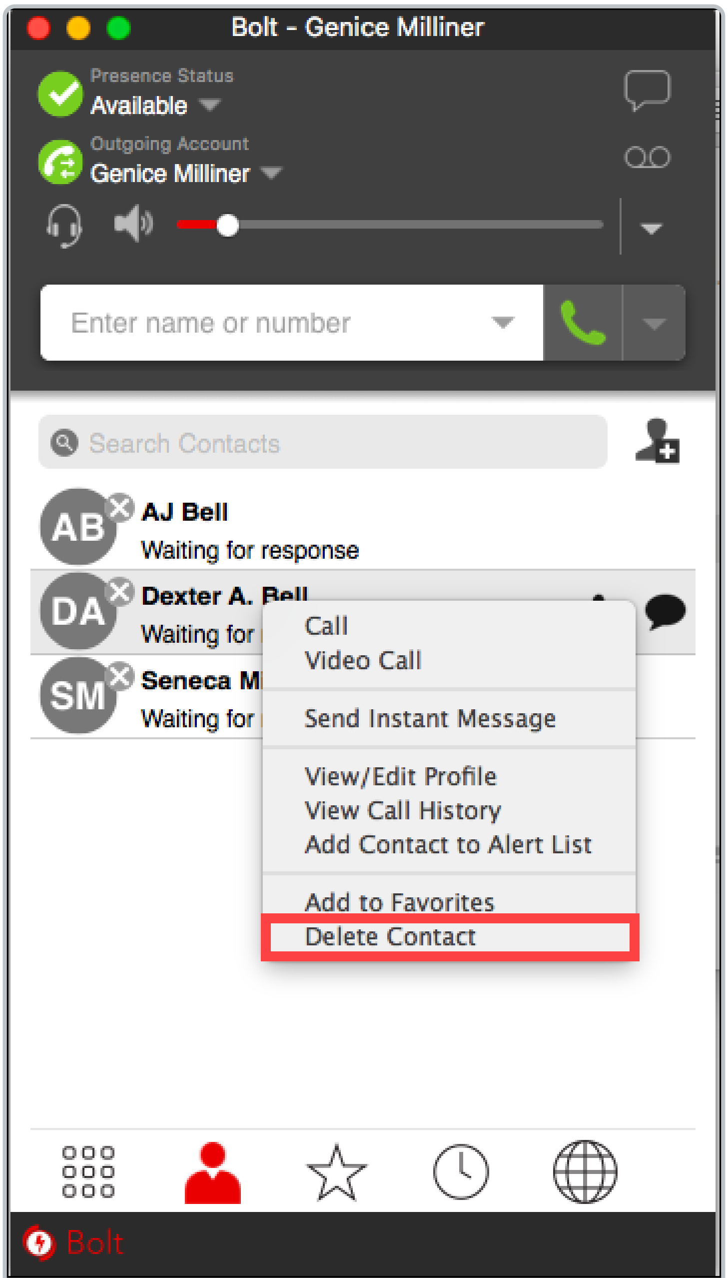


Figure 11 Shortcut Menu - Delete Contact

Select **Delete Contact** from the shortcut menu. A confirmation message as illustrated in Figure 12 below is display.

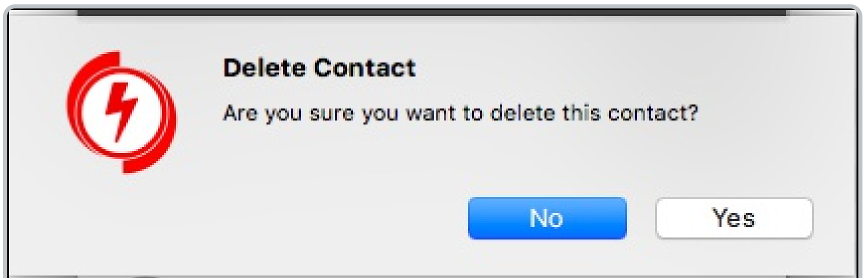


Figure 12 Delete Contact Confirmation Message

Select the **Yes** button to confirm the deletion.

Export Contacts

1. From the main menu select **Contacts > Export Contacts**. The **Export Contacts** wizard is launched.
2. When you click **Next**, the export begins. The result is:
3. For a PST export, the existing .pst file is updated to include the entries from the Bolt contact list. If Outlook is open, the entries immediately appear in the Outlook contacts.

All information in the Bolt contact list is exported to Microsoft Outlook. Only information that can be displayed in Outlook actually appears in the Outlook Contacts window. Typically this means that all softphone addresses are exported (and stored in custom fields) but not displayed in Outlook.

For other formats, a new file of the specified type is created.

1. To export contacts from Bolt, select **Contacts** from the main menu then **Export Contacts...** from the drop-down list.
2. When the **Select the file format** pop-up is displayed select the **Comma-separated values (*.csv file)** option then select the **Next>** button.
3. The **Select the location to export the contacts** pop-up is displayed. Enter the path and file name for the exported file or select the **Browse** button to navigate to the location and enter the file name.
4. Select the **Next>** button to display the **Export successful** pop-up.

Sorting Contacts

Bolt offers the option to sort contacts by **Name** or **Online Status**.

From the main menu, select **Contacts** then select the option you want to sort by.

Placing a Call with Bolt for Mac

Last Modified on 08/01/2018 5:21 pm EDT

There are a variety of ways to make calls using Kerauno such as keying in the phone number, use letters to call a number, call anonymously (hide your identity), etc.

Place a Call

Place the call as described in the table below. The outgoing call opens in its own call panel, below any other existing call panels. You will hear a ringing tone while Bolt attempts to make a connection.

Option	From the...	Description
Keying	Dialpad or computer keyboard	1. Enter the phone number in the B field using the dialpad or the computer keyboard. If entering a softphone address, you can enter the entire address (6045551212@domainA.com) or just the number (6045551212). As you type, a suggestion for completing the entry may appear. Choose the suggestion by using the Up/Down key and the Tab key, or keep typing. 1. Bolt makes a call as soon as you choose the suggestion. If you do not want to choose a suggestion, finish typing and click the **Call** button or press **Enter**.
Drag-and-drop contact or previous call	Contacts or History tab	Drag an entry from the **Contacts** or **History** tab.

Right-click a contact or previous call	Contacts or History tab	Right-click an entry from the **Contacts** or **History** tab and choose **Call**.
Double-click a contact	Contacts tab	Contacts have a “double-click” action that makes an audio phone call.
Single-click a contact	Contacts tab	Hover over the right side of the contact to reveal the **Click-to-Call** button. Click to place a call using the primary phone number for this contact.
Double-click a previous call	History tab	Double-click an entry. An audio call is placed.
Redial	Redial button	• When the **Call Entry** field is empty, click the Call button. OR • Click the arrow in the **Call Entry** field and select a recent call. An audio call is placed.
Dialing	Dialpad	1. If the dialpad is not visible, click the **Phone** button at the bottom. 2. Click the numbers on the dialpad to enter the phone number. 3. Click the **Call** button or press **Enter**.
From an instant message	Messages window	Click the menu at the top of the **Messages** window and choose **Call**.

Letters to Numbers

You can type letters and Bolt will convert the letters to numbers when placing the call.

Select the **Turn Letters To Numbers** option from the drop-down then enter the phone number using letters and numbers as indicated in Figure 01 below.

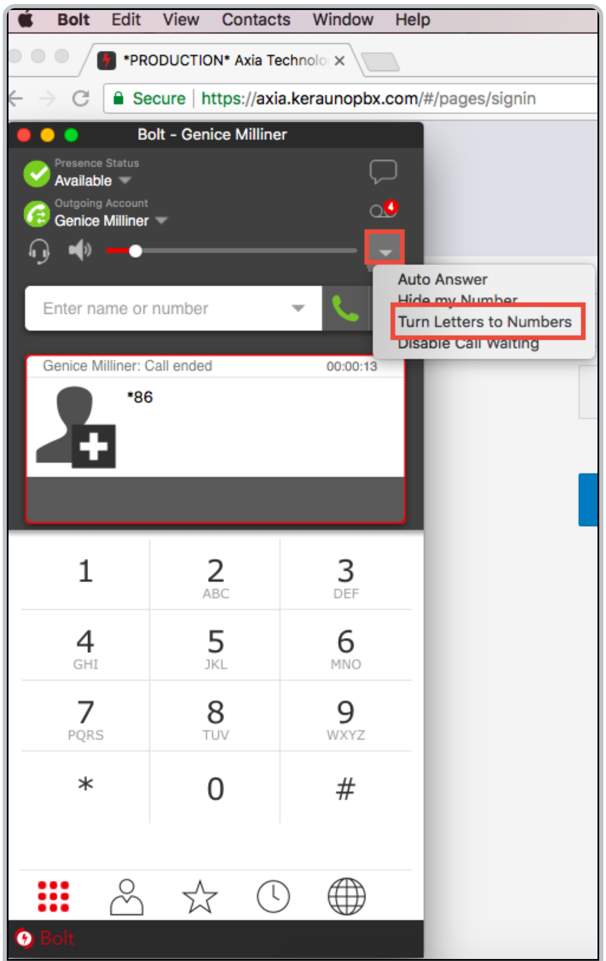


Figure 01 Turn Letters to Numbers Drop-Down

When you click the **Call** button the **Call Panel** will open and the call will be placed. The **Call Panel** will display the phone number in all numbers.

Annonymous Calling

You can hide your identity on a call with **Hide my Number** so the other person will not see your name or number on their phone. Your ID will be hidden for all outgoing calls until you turn off **Hide my Number**.

NOTE:	Anonymous calling is automatically turned off when you shut down or log off.

Select the **Hide my Number** option from the drop-down then enter the phone number as indicated in Figure 02 below.

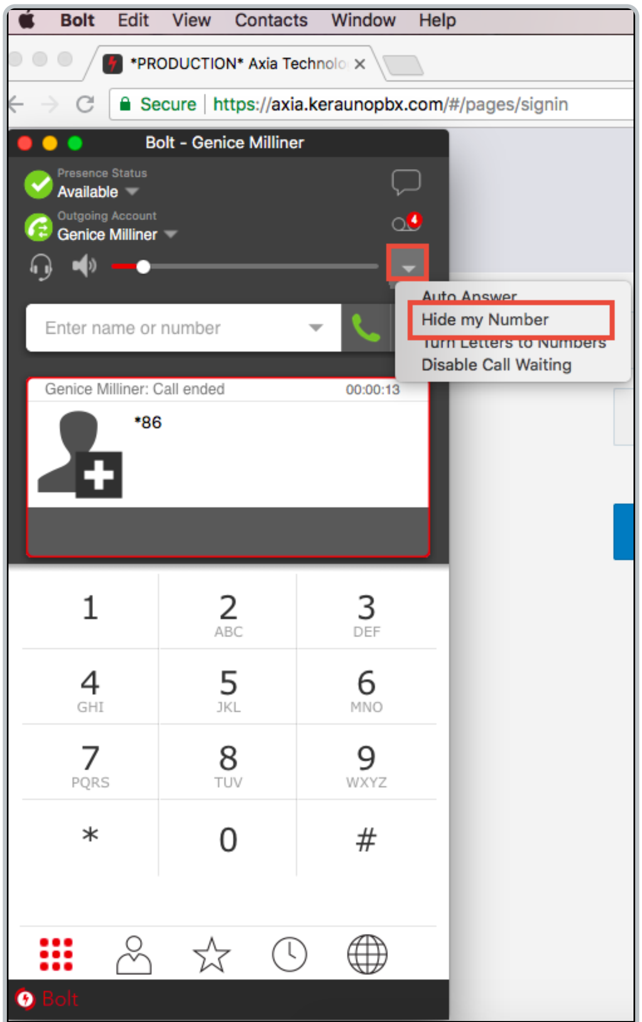


Figure 02 Hide my Number Drop-Down Option

Placing a Concurrent Call

You can place another call. On Bolt, you can make up to five concurrent calls.

Place or accept the initial call in your usual manner. When you need to make a concurrent call, simply enter the phone number for the concurrent call and press the **Call** button as illustrated in Figure 03 below.

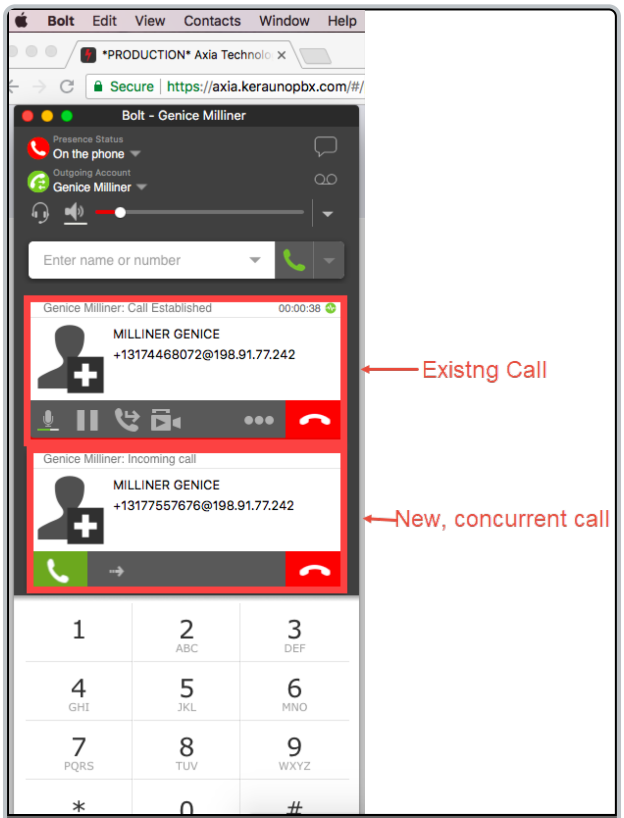


Figure 03 Concurrent Calls

When you press the **Call** button the original call you were on is put on hold and the new number is dialed.

Also, if you are on a call and another call comes in, accepting the new call puts the original call on hold.

Dealing with an Auto-Attendant

If you know that your call will be answered by an auto attendant and you know what menu items you will choose, you can include those menu items (DTMF) in the phone number when you dial it:

- Before the first DTMF number, include at least one capital P.
- You can include other Ps. Each P causes Bolt to wait one second before sending the next character.
- At the end of the input, you must include a semi-colon (;) character.
    - Example: To dial a number, add a 3-second delay and then press 44, enter this in the call entry field: 6045551212PPP44;
    - Example: To dial a number, add a 6-second delay, then press 1 then 3 then

2, each with a two second delay: 6045551212PPPPPP1PP3PP2;

- A capital X or comma (,) can be used instead of P. The following will work in the same way as the first example above: 6045551212XXX44.

Ending a Call

To end a call on Bolt, select the red phone receiver to hang up the call as indicated in Figure 04 below.

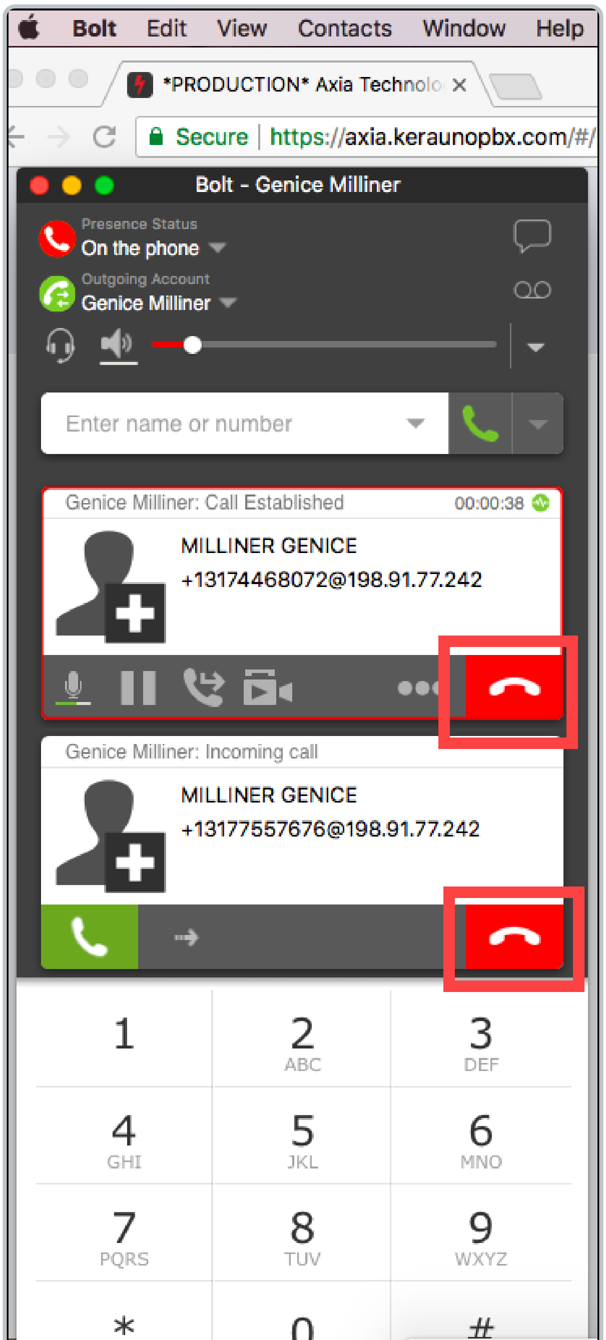


Figure 04 Ending a Call

Testing Audio Devices in Bolt for Mac

Last Modified on 08/07/2018 10:37 am EDT

You can verify that your microphone and speakers are working and can set the volume to a comfortable level without having to place a phone call.

Testing Audio Devices

To verify that your microphone is working correctly, select **Bolt > Preferences** from the main menu as illustrated in Figure 01 below.

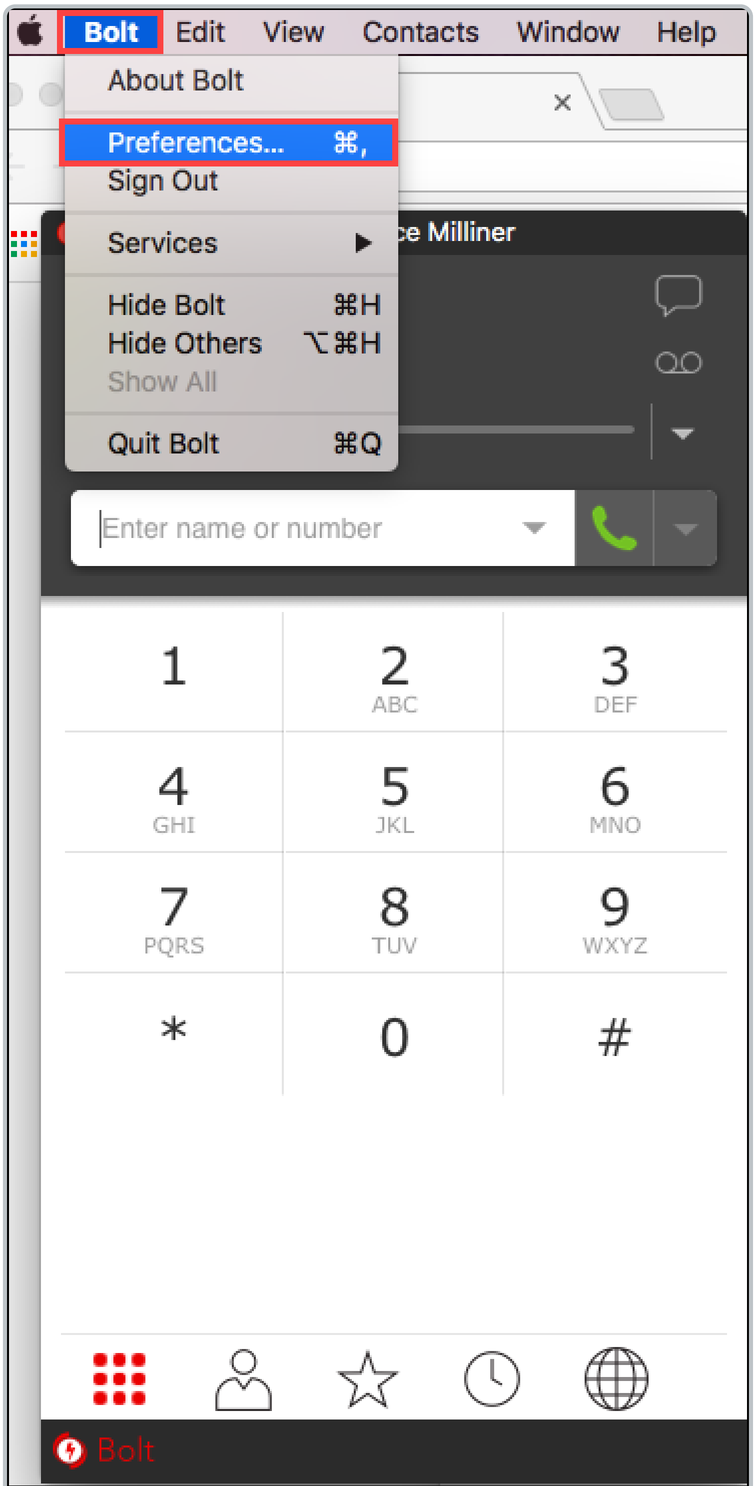


Figure 01 Bolt Menu Preferences Option

When the **Preferences** pop-up dialog box is displayed, select the **Devices** tab as illustrated in Figure 02 below.

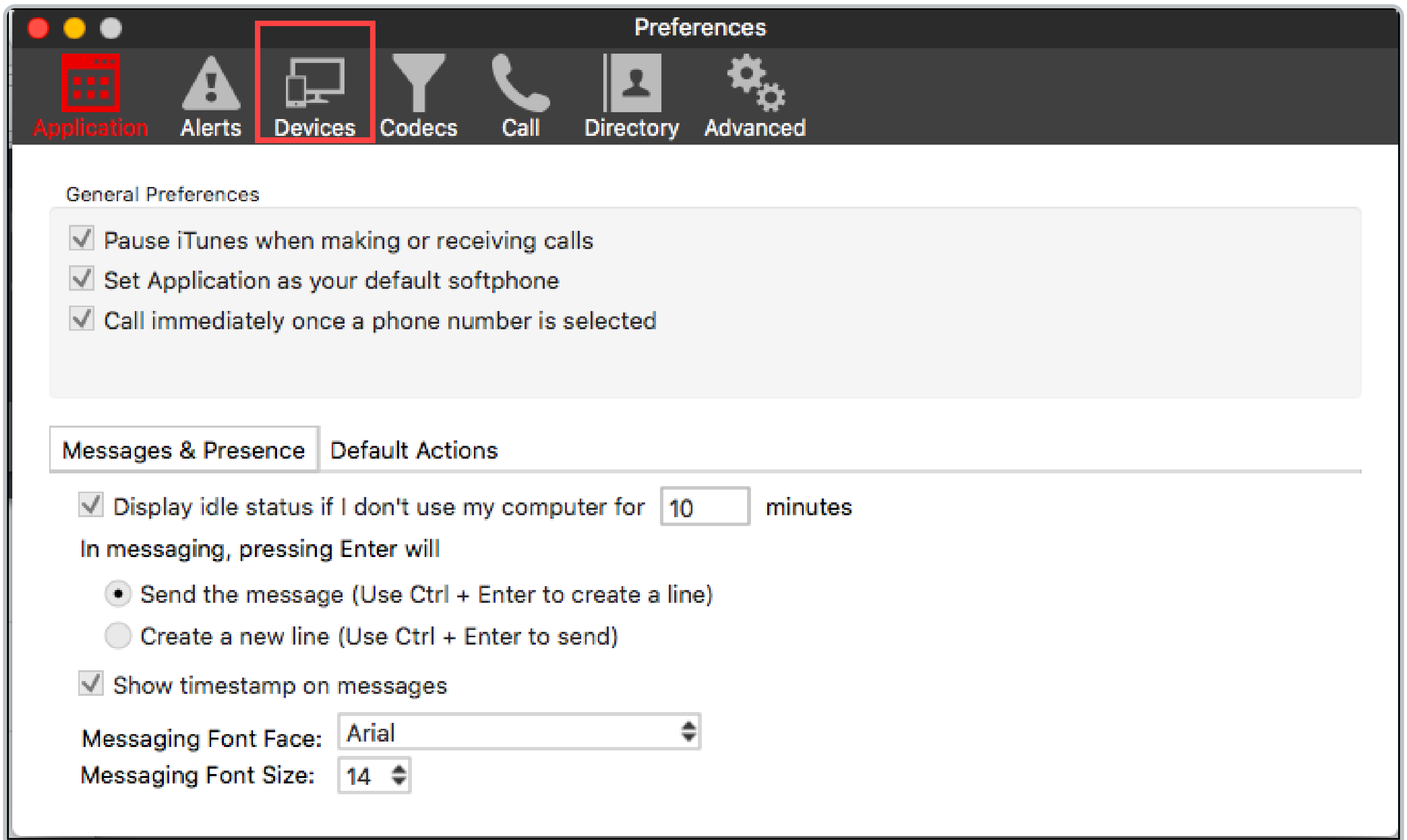


Figure 02 Select Devices Tab

When the **Devices** tab is displayed select the **Test Devices...** button as illustrated in Figure 03 below.

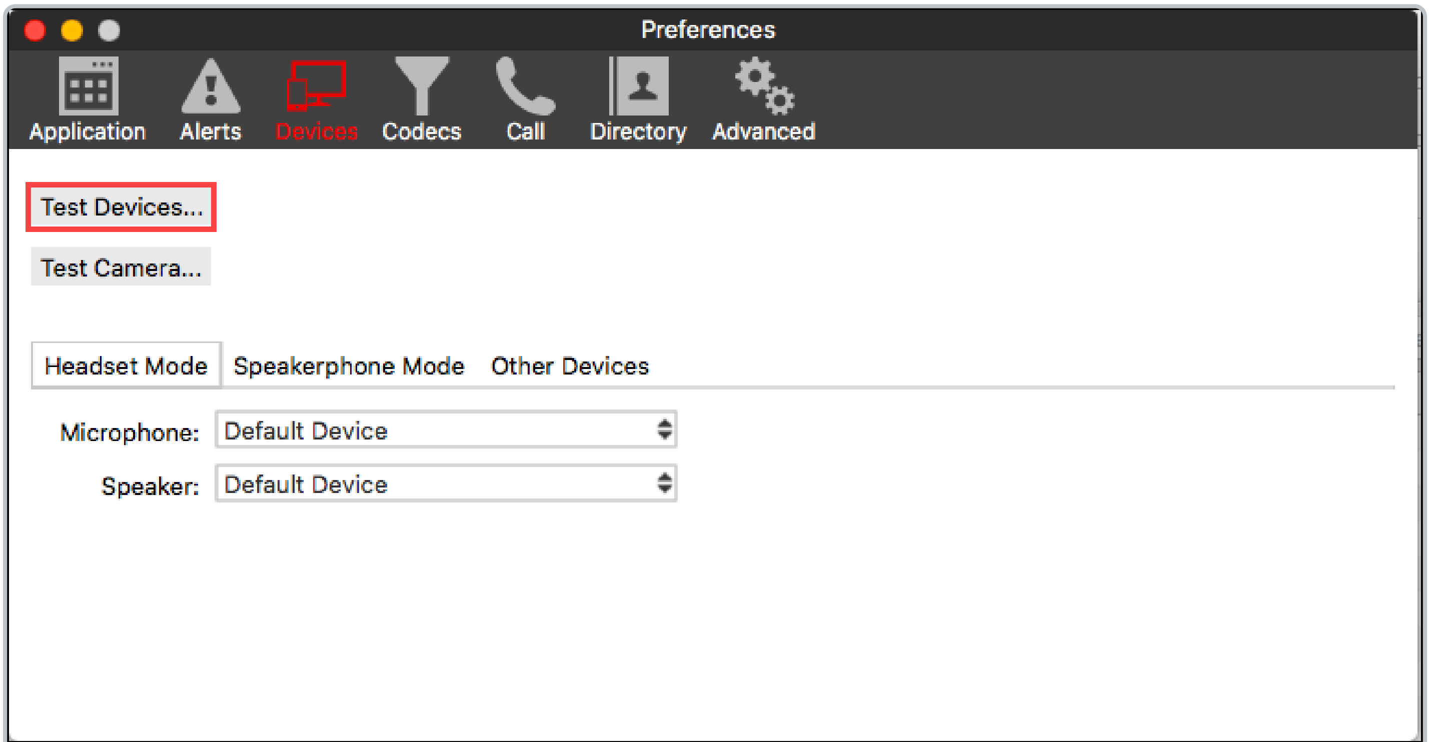


Figure 03 Test Devices Button

From the **Devices Troubleshooting** screen select the appropriate microphone from the first drop-down as illustrated in Figure 04 below.

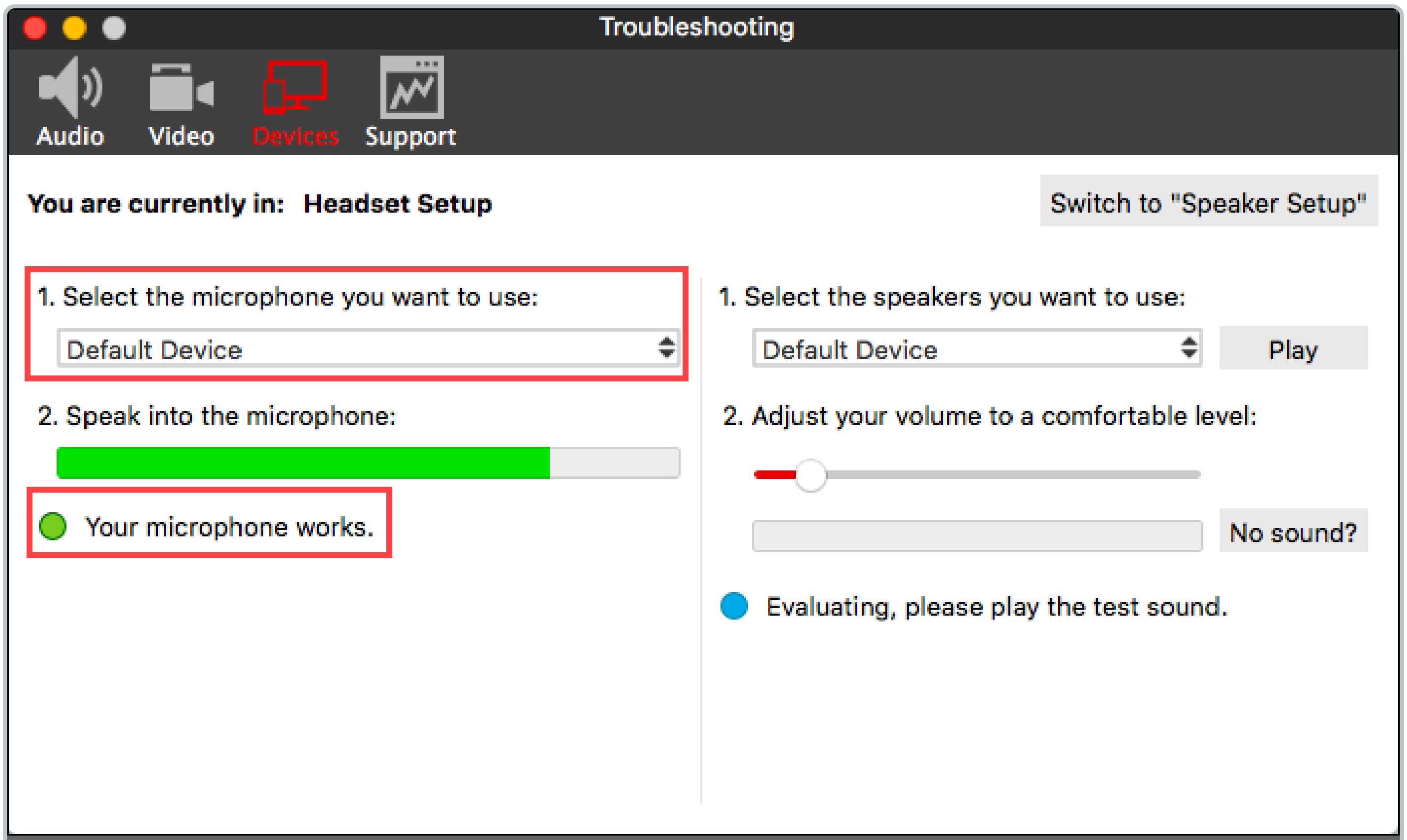


Figure 04 Troubleshooting Screen - Testing Microphone

Speak into the microphone and a message will display letting you know if it works (refer to Figure 04 above).

Testing Audio Quality

To verify that your speakers are working correctly, select the appropriate speakers you want to use from the drop-down list then select the **Play** button as illustrated in Figure 05 below.

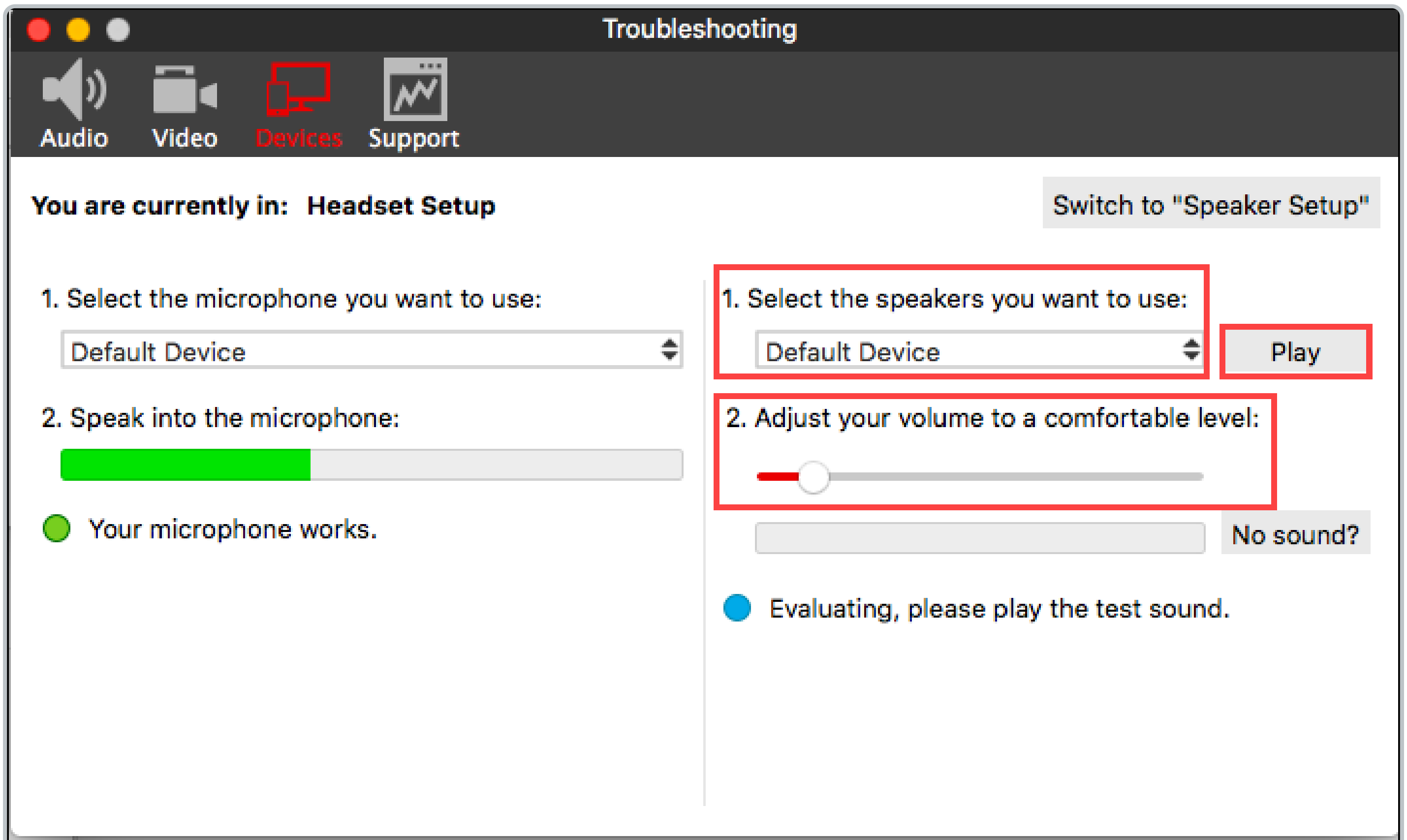


Figure 05 Troubleshooting Screen - Testing Speakers

Use the slider bar, indicated in Figure 05 above to adjust your volume. If there is no sound playing through your selected speakers, select the **No sound?** button as indicated in Figure 06 below.

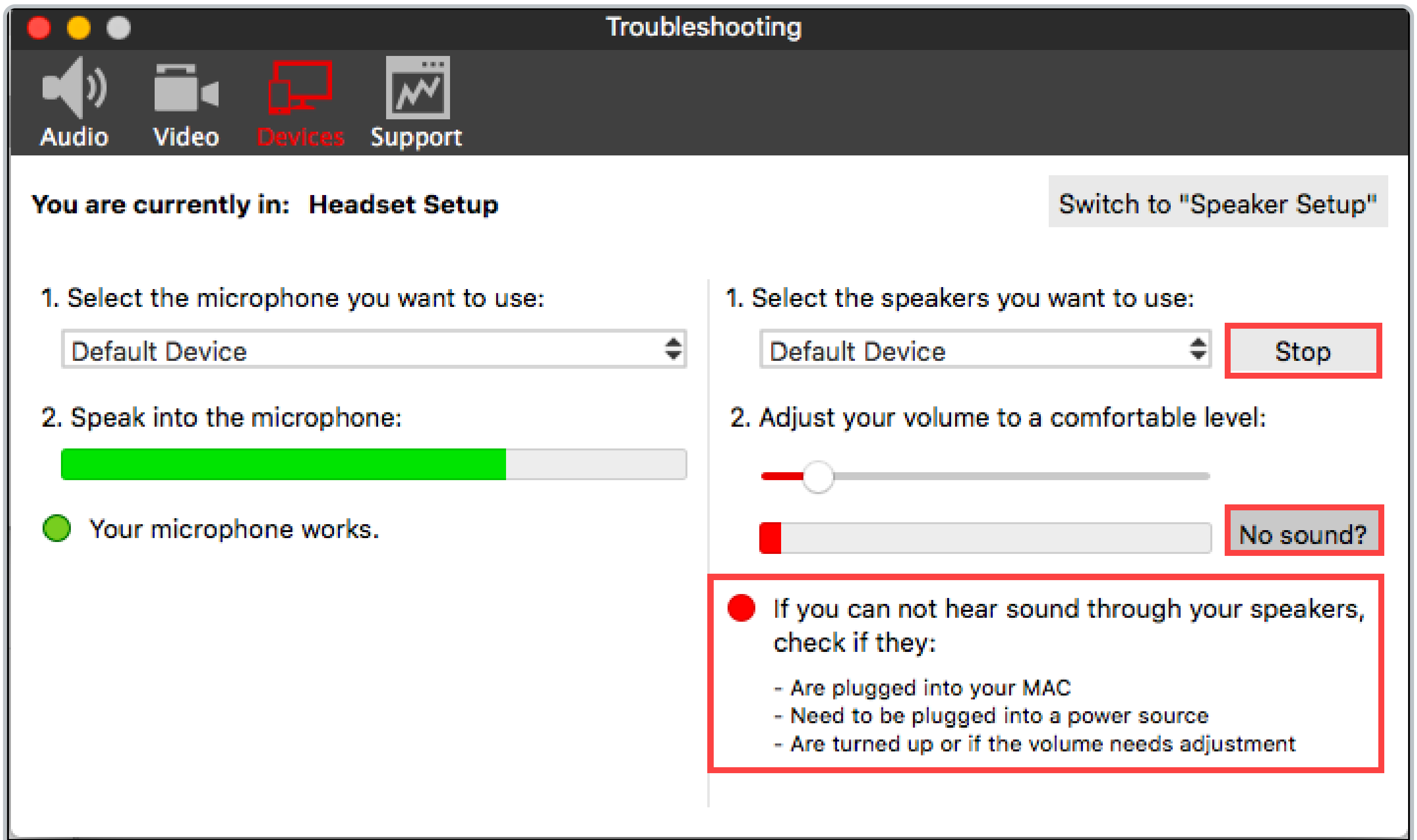


Figure 06 Figure 05 Troubleshooting Screen - No Sound When Testing Speakers

Use the information displayed, as illustrated in Figure 06 above, to check your sound.

Transferring Calls in Bolt for Mac

Last Modified on 08/01/2018 5:22 pm EDT

Calls received via Bolt for Macs can be transferred one of two ways: Unattended Transfer and Attended Transfer. The Unattended Transfer, also called a Blind Transfer, transfers the call directly to the selected number; the Attended Transfer allows you to speak with the individual the call is transferring to prior to the actual transfer.

Unattended Transfer

While on a call, select the **Call Transfer Button** as illustrated in Figure 01 below.

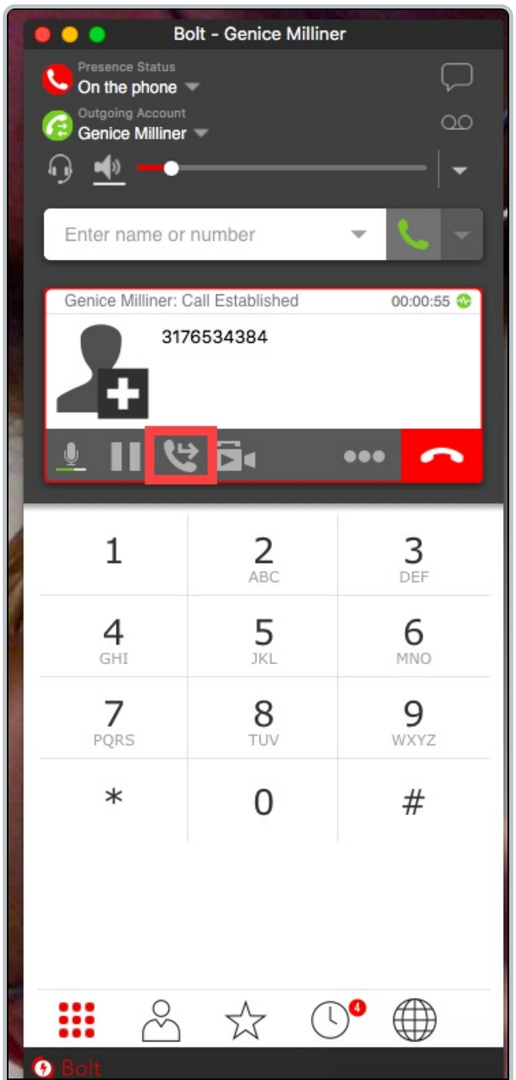


Figure 01 Call Transfer Button

This autmatically puts the call on hold and displays a **Call Entry** field as illustrated in Figure 02 below.

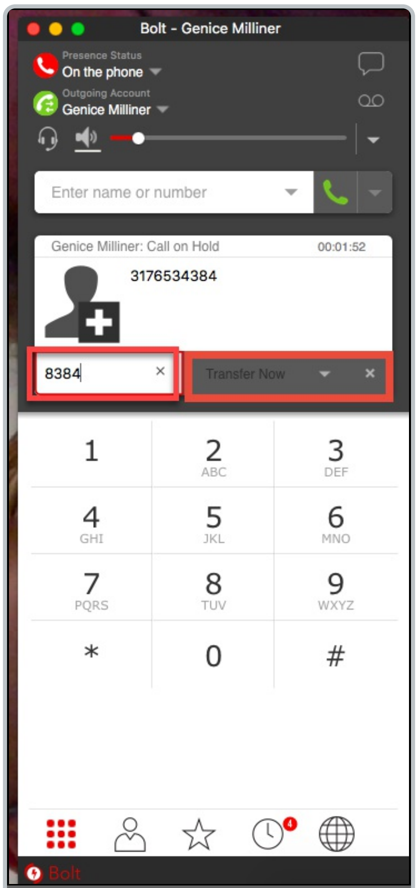


Figure 02 Transfer Now Button

Enter a name or number into the field then press the **Transfer Now** button, as illustrated in Figure 02 above, to transfer the call.

Attended Transfer

While on a call, select the **Call Transfer Button**. This autmatically puts the call on hold and displays a **Call Entry** field. Enter a name or number into the field then press the

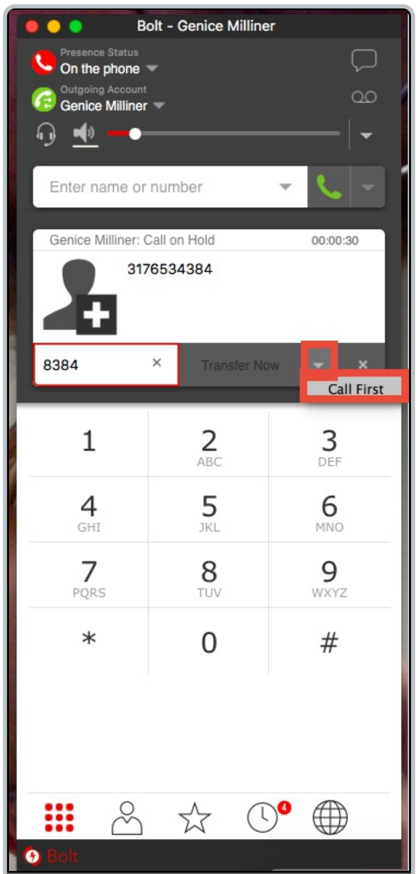


Figure 03 Attended Call Transfer

If **Call First** is displayed, select the button; if not, select the down arrow then press the **Call First** option from the drop-down list as illustrated in Figure 03 above. When the person you are transferring the call to answers, you can speak to them, providing necessary information. Then press the **Transfer Now** button as indicated in Figure 04 below to complete the call transfer.

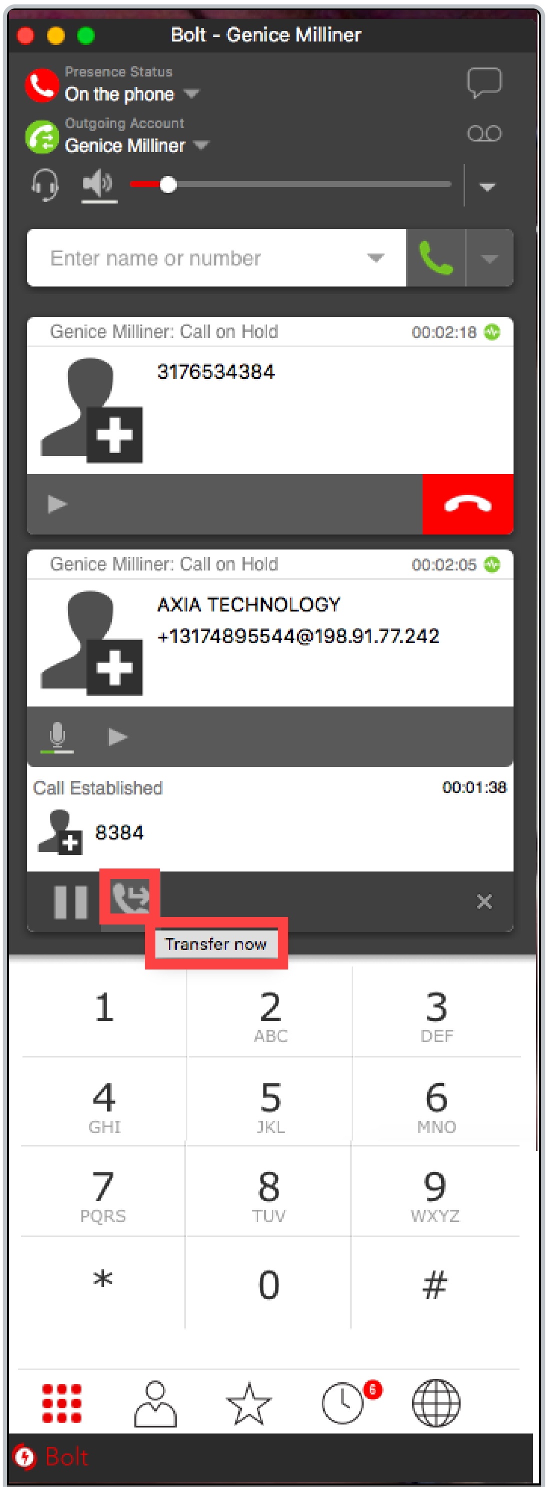


Figure 04 Transfer Now Button

Working with Calls in Bolt for Mac

Last Modified on 08/01/2018 5:22 pm EDT

Bolt must be running to answer incoming calls. It can be running in the system tray but it must be running.

NOTE:	If Bolt is not running, incoming calls may be directed to voicemail; check with your VoIP service provider or system administrator.

Incoming Calls

As soon as an incoming call is received, a call panel appears, showing information about the call. The new call displays in its own call panel and the **Call Alert** box is displayed.

To answer an incoming call with Bolt, select the green telephone receiver as indicated in Figure 01 below.

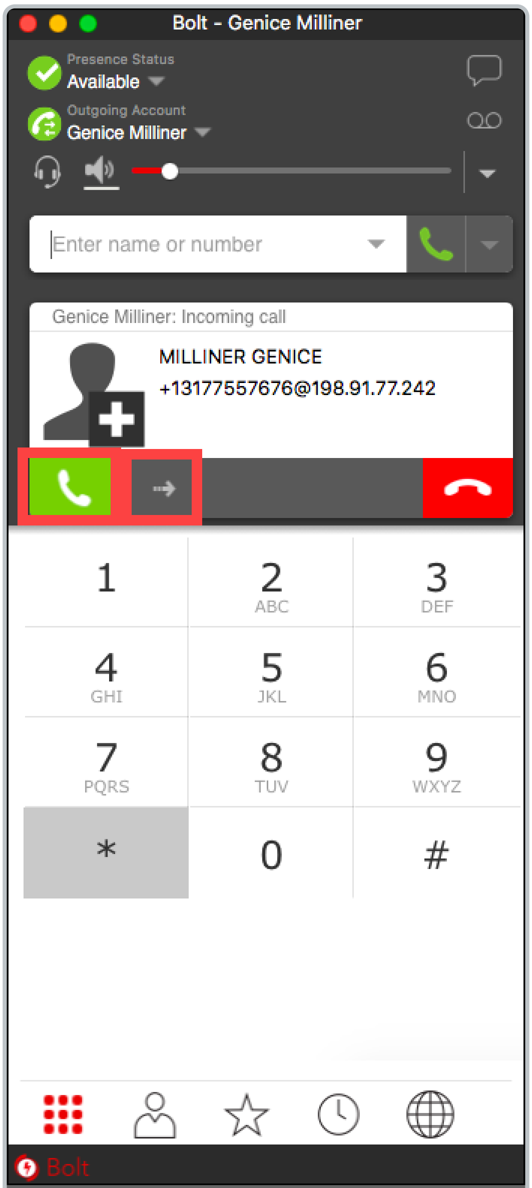


Figure 01 Handling an Incoming Call in Bolt for Mac

You can also select the **Forward** button (right arrow next to the Answer button) as indicated in Figure 01 above to display a **Call Entry** field. Enter a name or number to forward the call to then select the **Forward Call** button as illustrated in Figure 02 below.

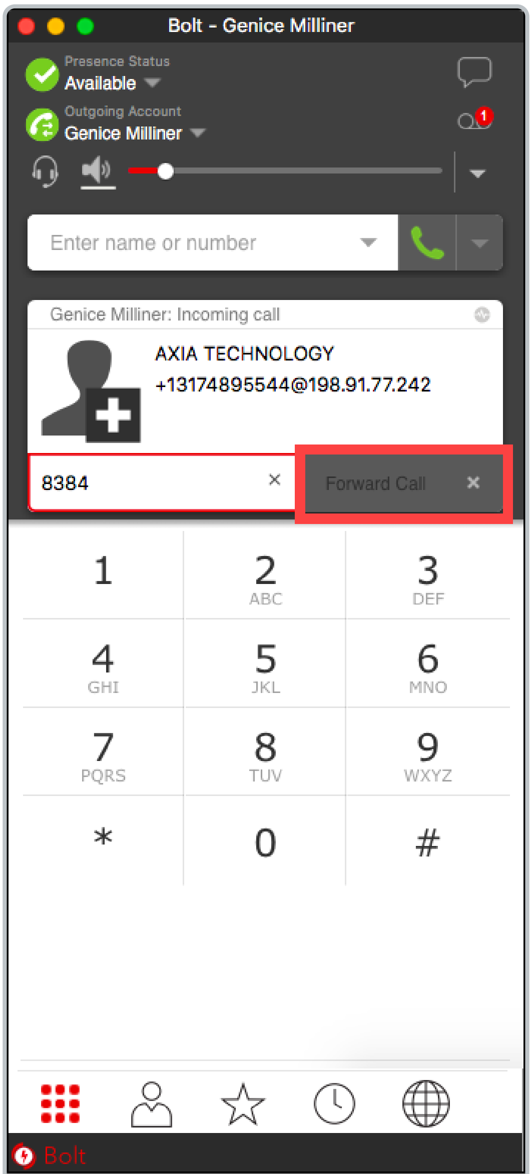


Figure 02 Forward Call Button

Auto Answer

The default time limit for Bolt to auto-answer an incoming call is 3 seconds. This can easily be changed if necessary.

From the main **Bolt** menu select **Preferences** as illustrated in Figure 03 below.

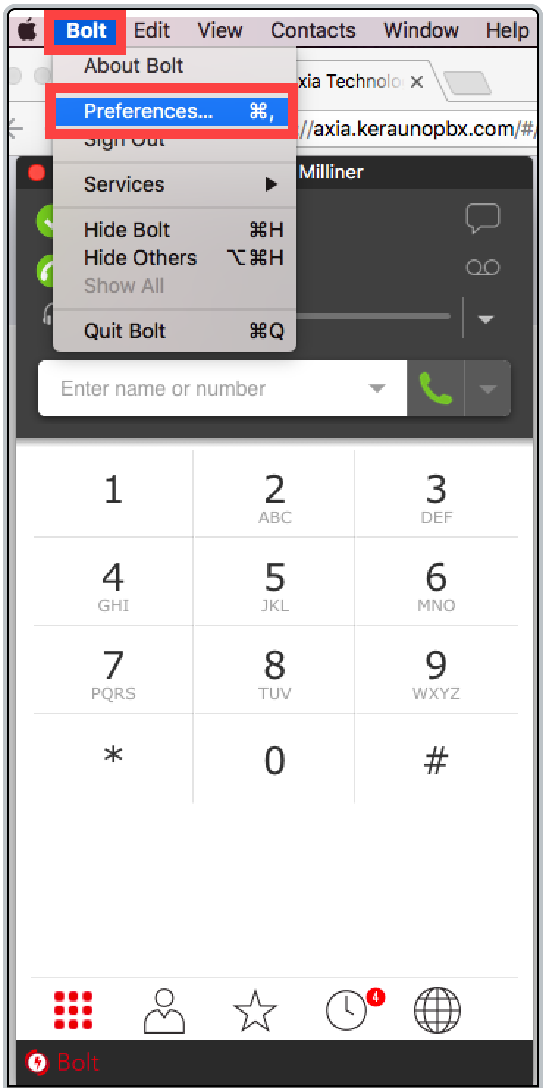


Figure 03 Bolt Main Menu

When the **Preferences** dialog box is displayed, select **Calls**. Enter a time, in seconds, that you want to pass before Bolt automatically answers a call for you as illustrated in Figure 04 below.

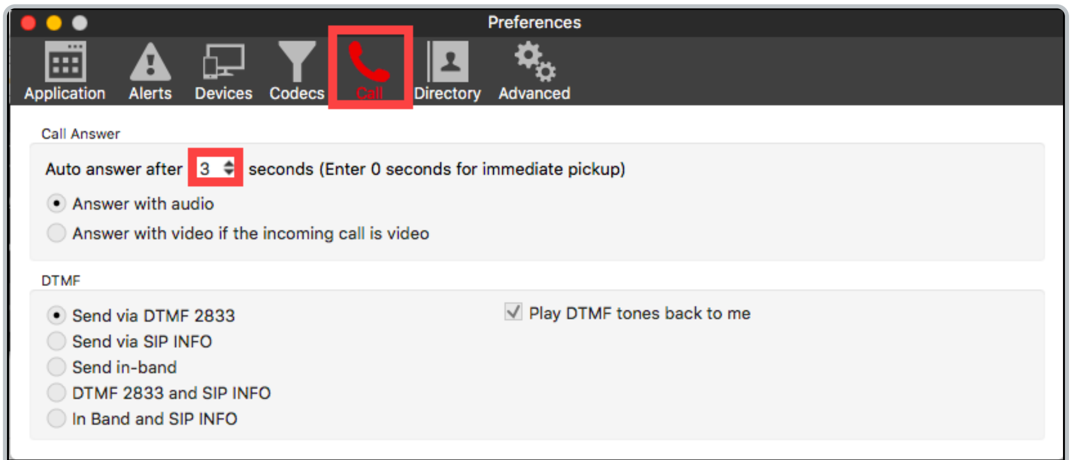


Figure 04 Call Preferences

Disabling Call Waiting

You can easily turn on **Disable Call Waiting** as necessary. If it is on when you are on a call, any new incoming calls will go straight to voicemail or will ring as busy (to the caller). In this way, you are not distracted by incoming calls.

To turn on **Disable Call Waiting**, select the down arrow to the right of the **Volume** slider as indicated in Figure 05 below.

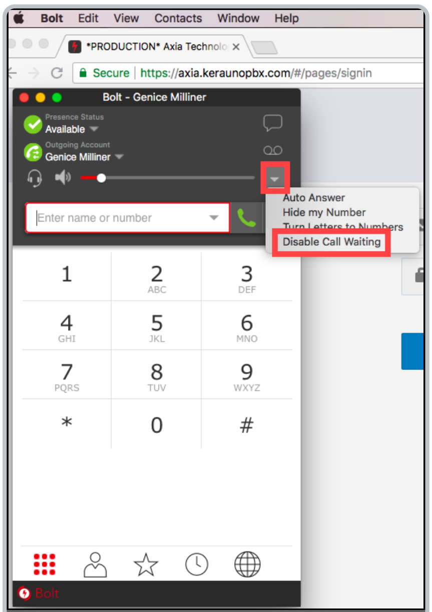


Figure 05 Disable Call Waiting

Select **Disable Call Waiting** from the drop-down list as indicated in Figure 05 above.

NOTE:	You can enable this feature even during a call, and it will take effect right away. The incoming call will display as a **Missed Call** on the **History** tab.

Populating Your Contact List in Bolt for Mac

Last Modified on 07/25/2018 8:57 am EDT

Typically, you will want to create contacts in order to easily make phone calls, send IMs and transfer files. You can bring in contacts from other sources such as a CSV file, or your Microsoft® Outlook® address book. See “Populating the Contact List” for all the sources.

In addition:

- During a call that you place or receive, you can add the other party to your contact list. See “Handling an Established Call” for detailed information.
- You can add addresses to the **Contact** list one by one.

Verifying your Presence Setup

View the contact list: some or all your contacts should have a presence icon besides their name. In order for a contact to include a presence icon, it must be “presence-ready” and you must be subscribing to the contact. (“Presence-ready” means that the contact has an address that allows for presence data to be shared.)

If none of your contacts show an icon and you expect at least one of them to show it, follow the steps in this table:

Contact Storage Method	Presence Account	A contact is “presence ready” if...	If the contact is “presence ready” and the presence icon still does not show

Local	SIP	The contact has an address in the Softphone field. Verify this on the Contact Profile.	Display the Contact Profile for the contact and make sure the "See this person's online presence" field is checked. If you initially populated the contact list by importing a file, the easiest solution is to redo the import and check the correct presence option.
Local	XMPP	The contact has an address in the Jabber field. Verify this on the Contact Profile.	
Outlook	SIP	The Outlook contact has an address in the "softphone mapping" field. The "softphone mapping" field is identified in Preferences > Contact Storage in "Field to use for Softphone address". Bolt recognizes the "softphone mapping" field as containing data that can be used for a phone call and for IM and presence.	• On the Bolt contact list, select the affected contacts, right-click, and choose Subscribe to presence. (If this menu item does not appear then none of the selected contacts have a value in the "softphone mapping" field (in Outlook) and therefore cannot be subscribed to.) • If you specified the wrong "softphone mapping" field on the Preferences > Contact Storage panel, you can change it.
Outlook	XMPP	The Outlook contact has an address in the IM field.	On the Bolt contact list, select the affected contacts, right-click, and choose Subscribe to presence.

Hot Keys in Bolt for Mac

Last Modified on 07/25/2018 8:57 am EDT

Press the key combinations listed in the table below to complete the corresponding functions listed.

Category	Function	Keyboard Shortcut
Making or answering a call	Answer an incoming call	Ctrl + N
	Decline an incoming call	Ctrl + D
	Redial the last dialed number	Ctrl + R or Ctrl + R then Enter
	End the call End the conference call (hang up on all participants)	Ctrl + E
During a call	Mute your voice during a call	Ctrl + M
	Hold or resume the call when the focus is on this call panel	Ctrl + H
	Transfer an established call when the focus is on this call panel	Ctrl + T
	Turn volume up when the focus is on this call panel	Up key

	Turn volume down when the focus is on this call panel	Down key
During a call	Mute your voice during a call	Ctrl + M
	Hold or resume the call when the focus is on this call panel	Ctrl + H
	Transfer an established call when the focus is on this call panel	Ctrl + T
	Turn volume up when the focus is on this call panel	Up key
	Turn volume down when the focus is on this call panel	Down key
	Display in full screen when the focus is on the video window	F11
During a screen share session	Bring the screen share window to the front and in focus	Shift + Ctrl + Alt + S
Opening a window	Open the Messages window	Shift + Ctrl + M
	Open the Preferences window	F8
	Open Troubleshooting Diagnostics	Ctrl + F9
	Open Help in a browser	F1

Exiting	Quit Bria	Ctrl + Q

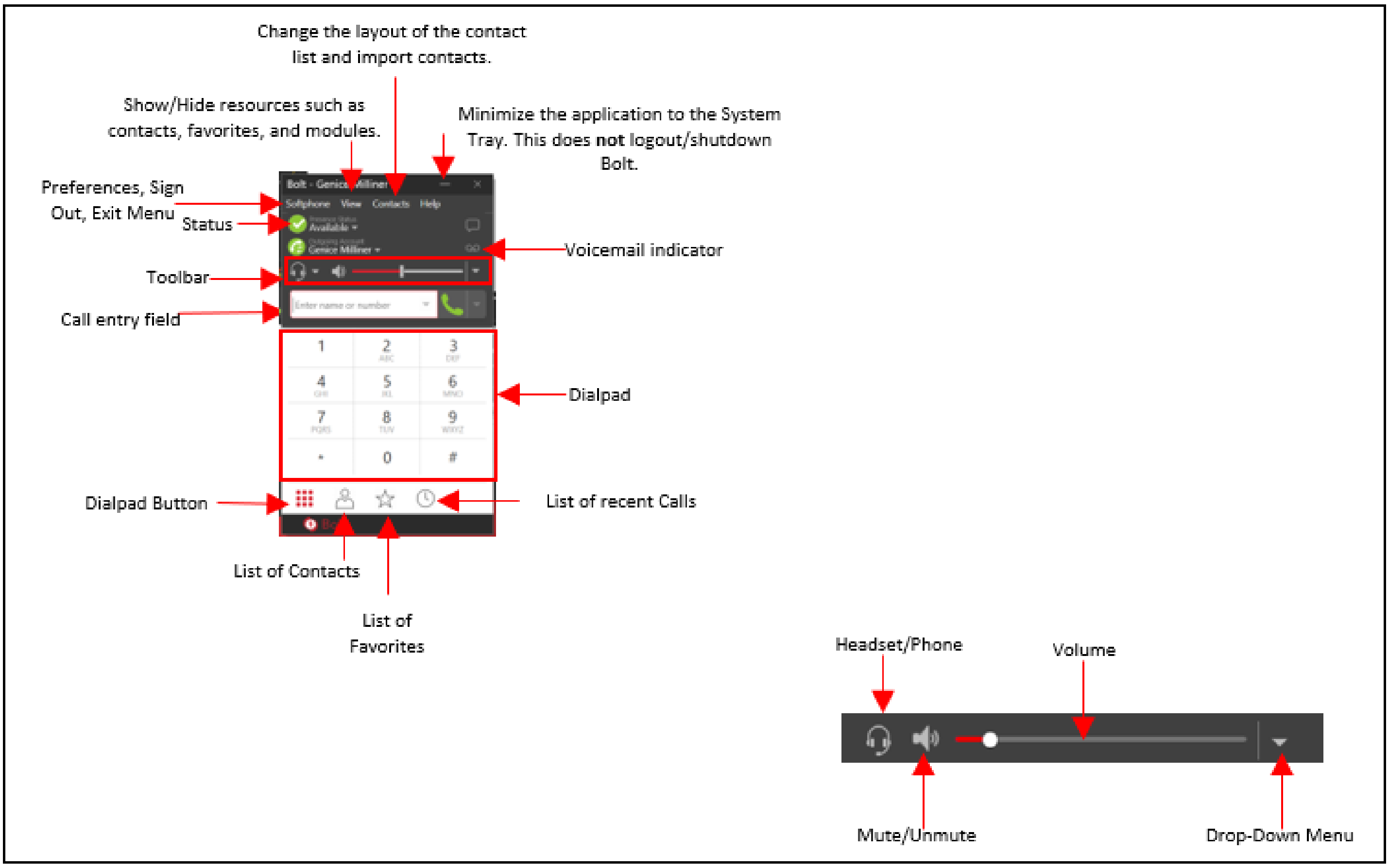
Main Menu in Bolt for Mac

Last Modified on 07/25/2018 8:54 am EDT

Main Menu Option	Description
Softphone	• **Accounts:** You will work with these settings only if advised to do so by your system administrator. These settings control how Bolt interacts with your VoIP service provider and are set individually for each account. • **Preferences:** These settings control the way that you work with Bolt and apply to all accounts. • **Log Out**: To log off and minimize Bolt to the system tray. If you click the Bolt icon in the status bar, the **Login** screen appears. This menu item does not appear if you have configured Bolt for no login. • **Exit**: To shut down Bolt. You can also exit by pressing Ctrl-Q.
View	Changes how Bolt looks.
Contacts	Allows you to work with contacts.
Help	Provides access to various service-related features.

On-Screen Softphone in Bolt for Mac

Last Modified on 07/27/2018 9:23 am EDT



Login to Bolt for IOS Devices

Last Modified on 10/02/2018 11:09 am EDT

This article discusses how to login to Bolt for IOS devices.

Login

On your IOS device, select the **Bolt** icon as indicated in Figure 01 below.

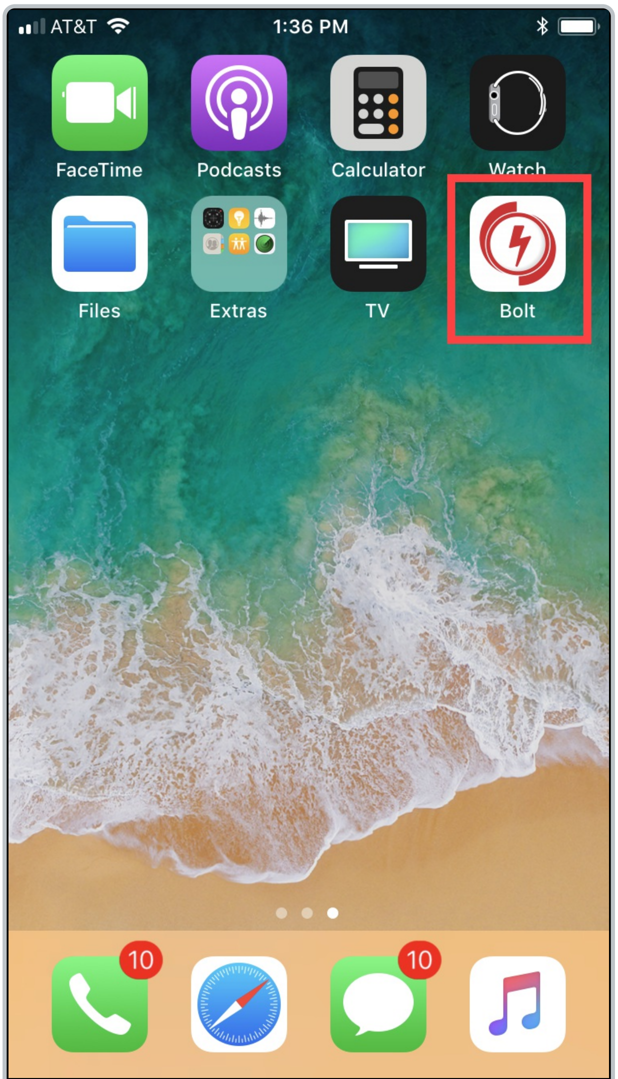


Figure 01 Select Bolt Icon

The **Bolt Login** screen is displayed. Enter your **Username** and **Password** as indicated in Figure 02 below.

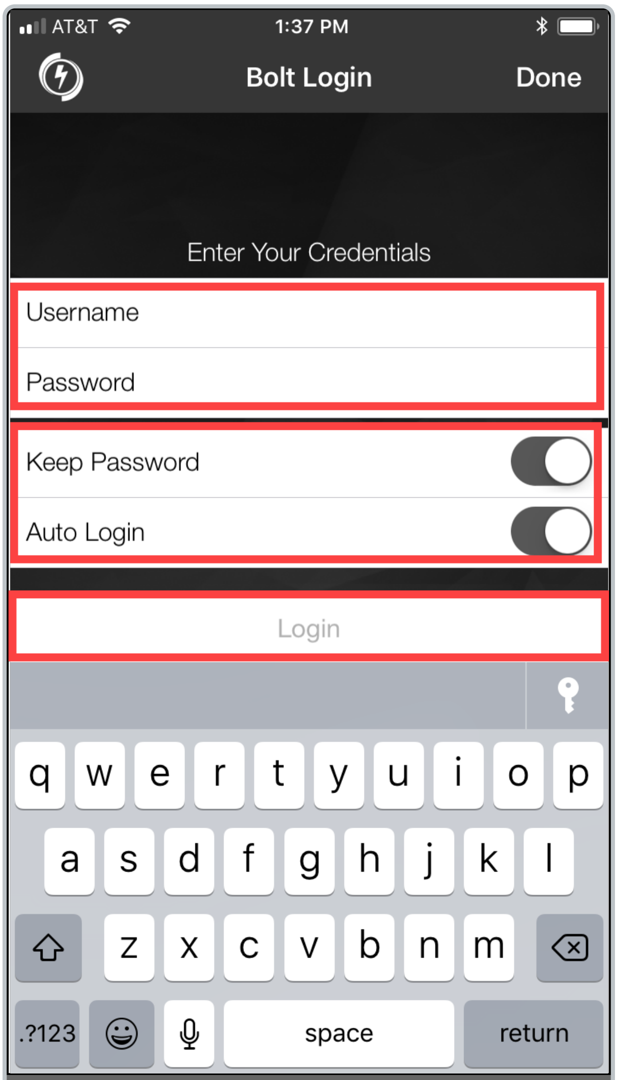


Figure 02 Login Screen

On the **Login** screen you can also elect to **Keep Password** and **Auto Login** by sliding the buttons to the right; slide the buttons to the left to disable these actions.

Select the **Login** button to login to Bolt.

Logout

NOTE:	

Device Requirements for Bolt Softphone (Desktop + Mobile)

Last Modified on 07/25/2018 8:54 am EDT

Keruano Bolt - Desktop Client System Requirements	
Processor	Minimum: Core 2 Duo 2.1 GHz Recommended: i5 / i7 2.4 GHz and above
Memory	Minimum: 4GB RAM Recommended: 8 GB RAM and above
Hard Disk Space	400 MB (Install/Upgrade, 200 MB operation)
Operating system	Windows 7 (SP1) Windows 8.1 (desktop mode) Windows 10 (creators update required) Mac OS X 10.11 (El Capitan) Mac OS X 10.12 (Sierra) Mac OS X 10.13 (High Sierra)
Connection	IP network connection (broadband, LAN, wireless); Constant/Reliable Internet connection

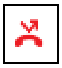
Kerauno Bolt - Android Client System Requirements	
Android Operating System	Android V4.4+ or Later
Hardware	Bolt has been tested on a wide range of Samsung, HTC, LG, Nexus, and Google devices. *Bolt may operate well on other non-certified devices*
Hard Disk Space	114.4 MB

Kerauno Bolt - IOS Client System Requirements	
IOS Operating System	Requires iOS 10.0 or later
Hardware	iPhone 5 or Later iPod Touch (6th Generation) iPad – (4th Generation or Later)
Hard Disk Space	114.4 MB

Call Type Indicators in Bolt for IOS Devices

Last Modified on 07/25/2018 8:56 am EDT

The table below lists call type indicator icons and their meanings.

Icon	**Meaning**
	Missed Call
	Incoming Call
	Outgoing Call
	Incoming Recorded Call
	Outging Recorded Call

Updating Fields in the Native iOS Contacts Application vs. Bolt for Mac's Contacts

Last Modified on 07/25/2018 8:57 am EDT

There are some contact fields that can only be updated through the native iOS contacts application. These fields include:

- Instant Message
- Ringtone: Personalized vibration and ringtone for the contact
- Text Tone: Personalized vibration and alert tone for the contact
- Address
- Birthday
- Date: Important dates associated with the contact
- Related name: Other contacts that are related to the current contact
- Social Profile
- Notes

There are some fields that can only be updated through the native iOS contacts application. These fields include:

- Prefix
- Middle name
- Suffix
- Nickname
- Job Title
- Department

Some fields can be updated in Bolt for Mac's **Contacts** or in the native iOS contacts application. These fields include:

- First name
- Last name
- Company name

- Photo
- Softphone
- IM URI
- Phone
- Email
- URL

Quick Reference for Account-Specific Features (SIP) in Bolt for IOS Devices

Last Modified on 04/15/2019 5:07 pm EDT

All the fields on this screen must be supplied by your VoIP service provider or your XMPP service provider. To change these fields on an existing account, unregister the account first or turn **Enabled** "OFF" for the account.

Field	Description
mobile data network	
Disable Mobile Data	Appears when Settings > Preferences > Use When Available is ON. • ON: This account does not use mobile data to register for SIP service when a Wi-Fi network is not available and Bolt is on a mobile network. You cannot receive any messages or notifications on this SIP account when Wi-Fi is not available, and you cannot place or receive calls without Wi-Fi. • OFF: Bolt attempts to place and receive calls on this account when a Wi-Fi network is not available. Data charges with your mobile carrier may apply.

Disable VoIP Calls	Appears only when Settings > Preferences > Allow VoIP Calls is ON and Settings > Accounts > Account Specific Features > Disable Mobile Data is OFF. • ON: No VoIP calls can be made on this SIP account when a Wi-Fi network is not available and Bolt is on a mobile network. • OFF: Bolt attempts to place and receive calls on this SIP account when a Wi-Fi network is not available. Data charges with your mobile carrier may apply.
iM and Presence	
Enable IM & Presence	Available when Settings > Preferences > Enable IM & Presence is ON. • ON: Share your online status with and send instant messages to your Buddies. • OFF: Do not share you online status and send IMs with your Buddies.
Presence Agent	Appears when Settings > Account Specific Features > Enable IM & Messaging is ON. ON: Enable this setting if the SIP server supports Presence Agent for SIP SIMPLE. OFF: Default
Publish Refresh	Appears when Settings > Account Specific Features > Enable IM & Messaging is ON. Interval for publishing your status over SIP SIMPLE. Minimum 30 seconds; default 900 seconds.

Subscribe Refresh	Appears when Settings > Account Specific Features > Enable IM & Messaging is ON. Interval for subscribing your Buddy's status over SIP SIMPLE. Minimum 30 seconds; default 900 seconds.
SMS messaging	
Enable SMS	Available when Settings > Account Specific Features > Enable IM & Messaging is ON. • ON: Send an SMS to PSTN cell phone numbers by using the SIP SIMPLE protocol. Turn ON if your VoIP service provider supports this feature.
Split Longer Messages	Appears when Settings > Account Specific Features > Enable SMS is ON. Controls how a long SMS is split - either the client side or the server side. You can type a long message on Bria regardless of this setting. Turn this ON if your SIP server does not accept/split long SMS. • ON: Bolt splits a long message to multiple SMS messages and sends them to the SIP server. • OFF (default on the server side): Bolt sends a long message to the server and lets the server split it into multiple SMS.

IOS Devices Advanced Account-Specific Fields (SIP)

Last Modified on 04/15/2019 5:07 pm EDT

Field	Description
account additional	
Out. Proxy	Complete this field only if your SIP provider gave you an outbound proxy address, typically a domain name or an IP address.
Auth Name	Complete this field only if your SIP provider gave you an authorization name. Most providers do not use this field.
network traversal	
Current Strategy	See “Network Traversal”
ip version	

Wi-Fi IP Version	Specifies the IP version for DNS lookup and SIP signaling. Applies to Wi-Fi networks. This does not apply to HTTP/S connections such as login and provisioning. Bolt leverages the iOS native HTTP/S framework for these connections. • IPv4 – Bolt uses IPv4 and does not look for IPv6 at all • IPv6 – Bolt uses IPv6 and does not look for IPv4 • Prefer IPv4 – Bolt uses IPv4 first if it detects both IPv4 and IPv6 • Prefer IPv6 – Bolt uses IPv6 first if it detects both IPv4 and IPv6
Mobile IP Version	This settings has the same function as Wi-Fi IP Version except it applies to mobile data networks.
dtmf type	
Send DTMF using	The method used to send DTMF. DTMF is sent when you press a number key when you are dealing with an auto attendant, such as “press 1 for customer service”. If DTMF tones are not being recognized, try the other methods to resolve the issue. If DTMF is still not working, contact your VoIP service provider. Choose a method specified by your VoIP service provider: • RFC 2833 (Default) • SIP INFO • Inband DTMF. If Bria recognizes that RFC 2833 or SIP INFO fails, it sends Inband DTMF instead.

call dialing	
Use Tel URI	Change this value only if advised by your VoIP service provider. Some providers may require the tel:// format. - ON: Prefix SIP URIs with tel:// - OFF (default): Prefix SIP URIs with sip://
Strip Foreign Domain	- ON: Bolt removes the domain portion of the IP address if an inbound call has a different domain than yours and the username portion of the IP address is digits only. Log entries and history and contacts created from the log entries will store the username digits only. Try turning this setting ON if you receive a “403 – Not relaying” response to an outbound call. - OFF (default)
transport and security	

SIP Transport	Contact your VoIP service provider to identify the types of transport that are supported. Most VoIP service providers only support UDP transport. • Automatic • UDP – Turn Settings > Preferences > Run In Background ON to receive incoming calls when Bolt is in the background. • TCP – Allows you to take advantage of iOS multi-tasking support; i.e. receive incoming calls when Bolt is sleeping in the background. This preserves battery. • TLS – Supports signal encryption if it is supported by your VoIP service provider. If TLS is selected, a given call is encrypted if the other person also uses TLS. You may need to install a certificate on your iPad; contact your VoIP service provider. Also allows you to take advantage of iOS multi-tasking support; i.e. receive incoming calls when Bolt is sleeping in the background. This preserves battery.
Encrypt Audio	Encrypt a phone call at the media (audio) level using SRTP. Subject to VoIP service provider support. • Never (default): Audio is not encrypted. • Always: Audio is always encrypted. The call fails if the other person cannot accept encrypted calls. Call media encrypted shows during a call.
sip registration	
Incoming Calls	• ON: Receive calls on Bolt. • OFF: This account can only be used to make outgoing calls.

Wi-Fi Refresh Interval	The timer interval for Bolt’s attempts to register in order to refresh SIP account registration when on a Wi-Fi network. This value is placed in the “Expires” header field of the SIP Register message. Change this value only if advised to do so by your VoIP service provider. • Range: 30 to 900 seconds • Default: 900 seconds
Mobile Refresh Interval	This settings has the same function as Wi-Fi Refresh Interval except it applies to mobile data networks.
keep alive	
Wi-Fi Interval	A keep alive message maintains a pinhole through your firewall so that the account registration is maintained over a Wi-Fi network. The interval specifies how often the message is sent (in seconds). If you are experiencing problems, (for example, accounts become unregistered when using a Wi-Fi connection), try setting this interval to a lower number such as 20 seconds. Specify 0 to disable.
Mobile Interval	This settings has the same function as Wi-Fi Interval except it applies to mobile data networks.
tls cert management	

Verify TLS Cert	• ON (default): Bolt attempts to verify the certificate, sent by the SIP server to see if it is trusted. • OFF: Bolt accepts the certificate without attempting to verify it. It depends on how your service provider handles TLS certificates whether you need to take an extra step to make this work. • If the certificate has been trusted by well-known certificate authorities (such as VeriSign), you do not need to take further action. • If the certificate is a self-signed certificate, you need to install a corresponding CA certificate on the device in advance, so Bolt can verify a cert (received from the SIP server) against the CA certificate. Contact your VoIP service provider to get the corresponding CA certificate.
custom dns servers	
DNS Servers	See “Custom DNS Servers”.
sip miscellaneous	
Show Miscellaneous	Displays miscellaneous settings.

Wi-Fi NAT64 Support	Appears when Settings > Account Advanced > Show Miscellaneous is ON. Leave ON if there is a possibility that Bolt is going onto an IPv6-only network, trying to reach IPv4-only SIP services/infrastructure over a Wi-Fi network • Requires that the configured name servers support DNS64 • Requires a Session Border Controller (SBC) with latching support, or a STUN server. ICE is not supported. • This feature is typically not necessary on platforms/networks where alternative IPv4-to-IPv6 transition mechanisms are used (e.g. 464XLAT). Has no effect when Bolt uses IPv4 to communicate with the SIP server. (Settings > Account Advanced > Wi-Fi IP Version is set to IPv4.) • ON: If Bolt detects an IPv6-only network, it tries to use DNS64 to translate IPv4 addresses into IPv6 addresses.
Mobile NAT64 Support	Appears when Settings > Account Advanced > Show Miscellaneous is ON. This settings has the same function as Wi-Fi NAT64 Support except it applies to mobile data networks.
Enable PRACK	Appears when Settings > Accounts > Account Advanced > Show Miscellaneous is ON. • ON: Bolt advertises that it supports ‘100rel’and allows PRACK, as defined in RFC 3262. The outgoing INVITE message has ‘100rel’ in the Supported header and ‘PRACK’ in the Allow header. • OFF: (default) Bolt does not advertise these features.

Passive Session Timer	Appears when Settings > Accounts > Account Advanced > Show Miscellaneous is ON. Controls the use of session timers on SIP accounts. The session timer is used to determine if the call is still active. • ON (default): Bolt does not use session timers in any session, except if it is explicitly required by the remote party. • OFF: Bolt uses session timers in all sessions whenever the remote party supports and uses it. Only choose OFF if advised by your VoIP service provider.
Connection Reuse	Appears when Settings > Accounts> Account Advanced > Show Miscellaneous is ON. • ON: Bolt uses existing connections by adding the alias parameter in the Via header, as specified in RFC5923. Changing this setting might solve problems with dropping or holding calls.
Enable IMS	Appears when Settings > Accounts> Account Advanced > Show Miscellaneous is ON. Only choose ON if advised by your VoIP service provider. • ON: Bolt supports the IP Multimedia System. Bolt populates the authorization header upon every SIP request immediately, instead of after a challenge. Bolt uses the SIP account domain for authorization realm. • OFF: Default

Announcements

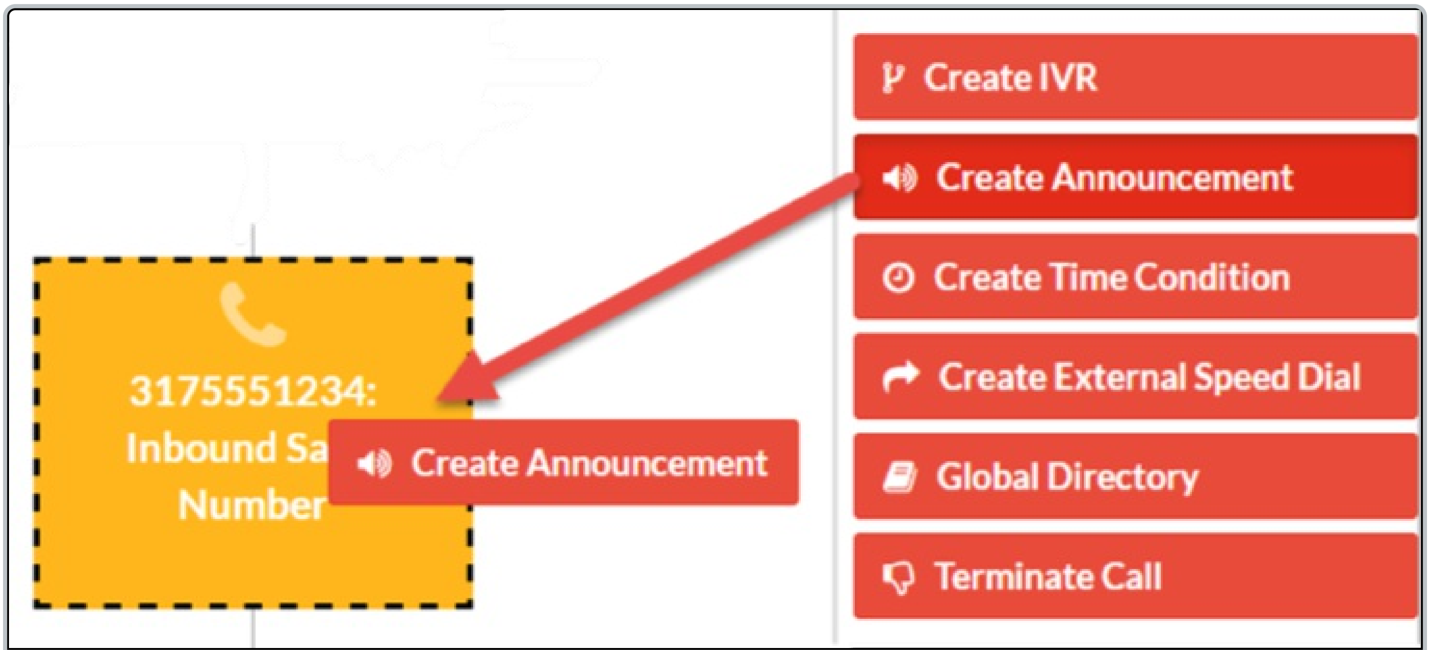
Last Modified on 05/25/2018 8:53 am EDT

An announcement in the Kerauno call flow tool is simply an information message that will play to a caller. After the audio message has been played to the caller, the call flow will move on to a configured "After Announcement" destination.

Some potential applications of an announcement would be to play a commercial before connecting the caller with a sales associate or providing your operating hours before sending the the caller to an IVR or menu.

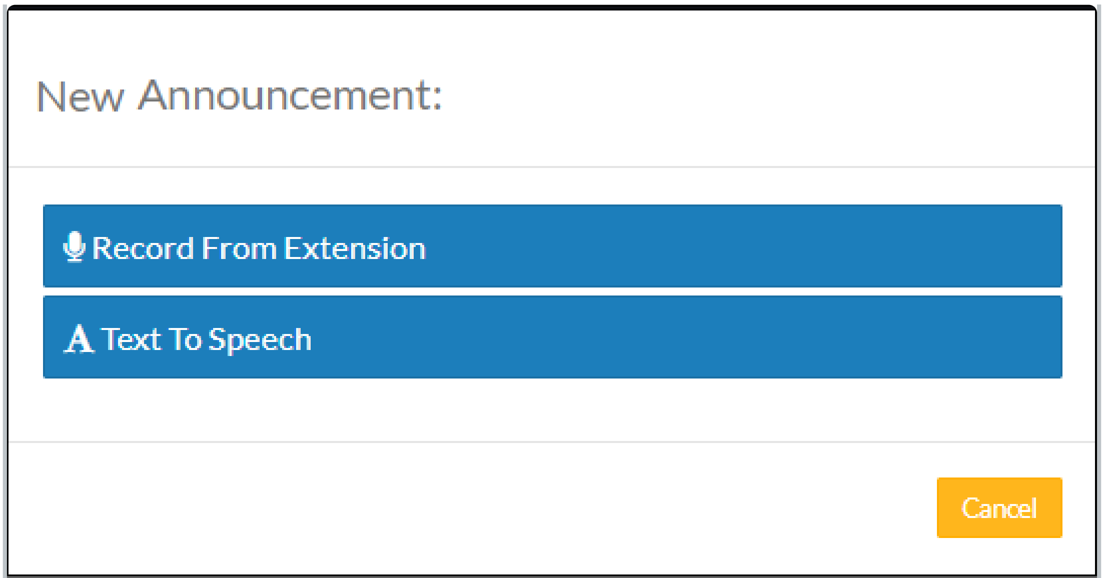
To create a new announcement, click and drag the 

button to the desired location on the call flow tree.



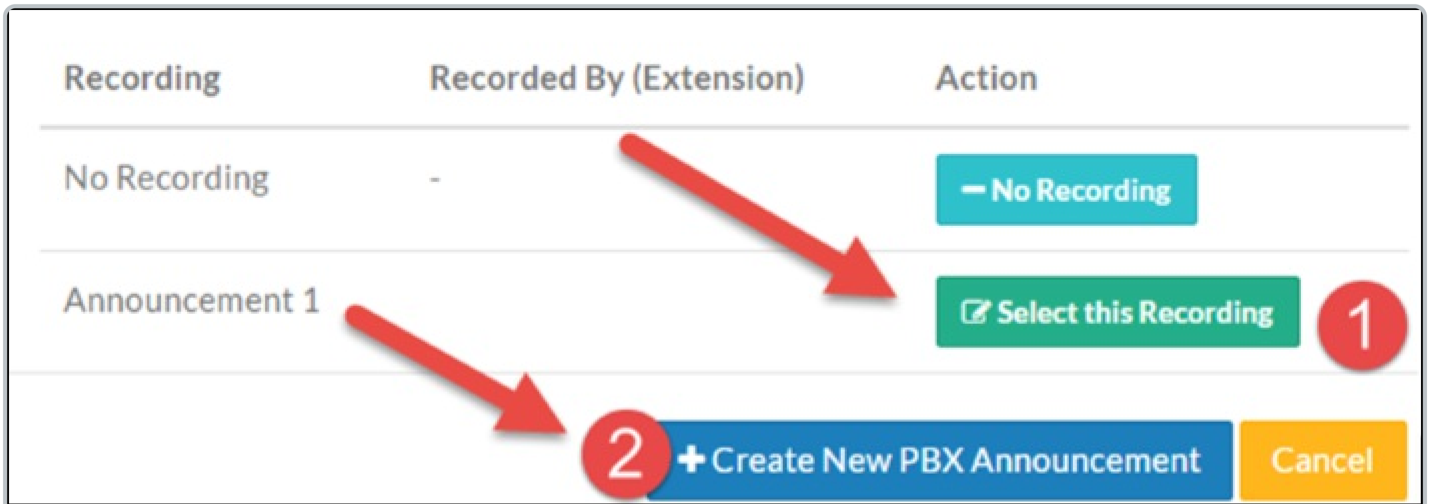
Call Flow Diagram - Create New Announcement

After selecting the desired location, a menu will open that will allow the administrator to choose the audio recording that will be played as well as the ability to name the announcement. The recordings listed here in the drop-down must be first built into the **System Admin > System Announcements** menu. Please note that you may also record a new greeting from this menu as well.



Add New Audio Announcement

Select the appropriate audio recording by pressing the Select this Recording button. When done, press the Create New PBX Announcement to save the recording and generate a new call flow announcement. After selecting **Create New Announcement** the recording will be added to the call flow.



Create New Announcement

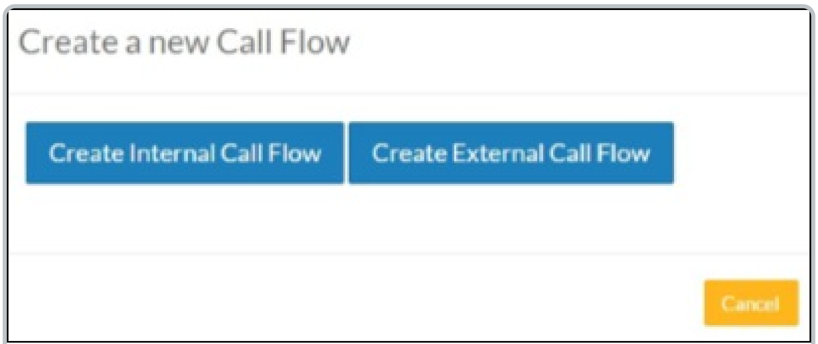
To set a destination to send the caller to after the announcement has played, click and drag any call flow object from the sidebar onto the blue announcement box. In the figure below, dragging the **Support Department** ring group over the announcement as shown will generate the call flow to the right. The call flow will be configured to play the **Support Hours** announcement and then call the **Support Department** ring group when the announcement has finished.

Announcement to Call Group Flow Example

Create a New Call Flow

Last Modified on 04/24/2019 11:26 am EDT

Call Flows allows for a visual representation of call routing that allows administrators to easily build routes that lead to IVRs, Ring Groups, Voicemail boxes, and more. To create a new call flow, select the green **+Create Call Flow** button from the main **Call Flow** menu. On the following screen, the option to create either an internal or external call flow appears.



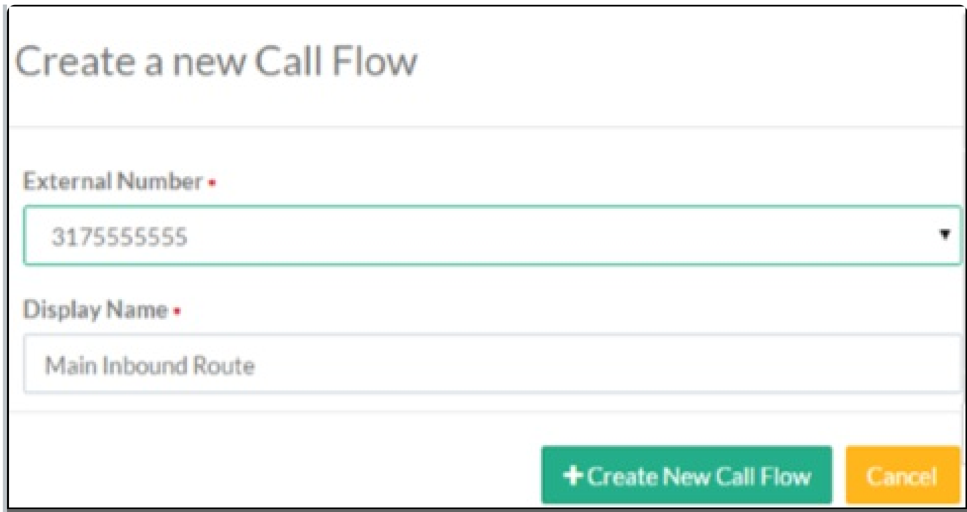
Create New Call Flow Dialog Box

Internal Call Flow: Internal call flows will be assigned a routing extension. Dialing or transferring to this routing extension from any registered phone will route calls according to how the Call Flow is configured. An internal call flow does not need to be assigned a 10 digit telephone number to function.

External Call Flow: An external call flow must be assigned a 10 digit number that has been built into the **System Admin > Number Manager** menu. Any outside callers that dial this number will be routed according to the Call Flow set for this number.

After selecting either an internal or external call flow, the option will be presented to select a 10 digit number (external call flows) or extension number (internal call flows) to assign.

For external call flows, only numbers built into the **Number Manager** will show in the **External Number** drop-down box. For internal call flows, this field will allow an extension to be entered. After selecting a number, give the call flow an easily identifiable name (Inbound Sales, Main Business Number, etc.) and type it into the **Display Name** field.



Create New Call Flow Number Dialog Box

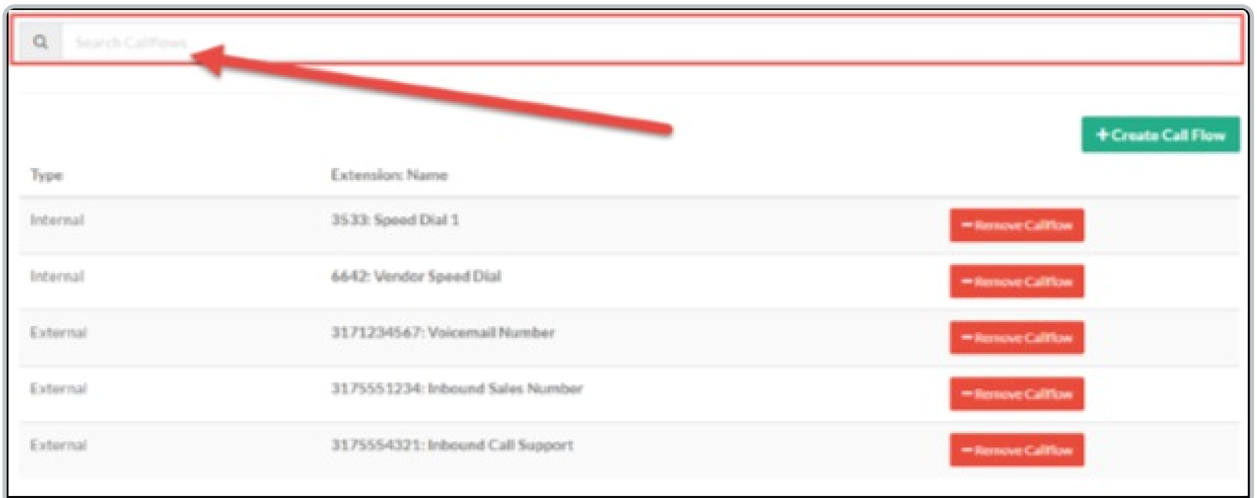
Once the number and **Display Name** fields have been completed, select the **+Create New Call Flow** button to create the new Call Flow and save it in Kerauno. The **Call Flow Tool** will open so that the newly created call flow can be configured.

Call Flows

Last Modified on 04/24/2019 11:09 am EDT

Selecting the **Call Flow** tool will display a list all active call flows on numbers built into Kerauno. All numbers that are included in the **System Admin** > **Number Manager** panel are available to build a call flow.

At the top of the **Call Flow** menu, there is a search bar in which either the number or name of a call flow may be entered. Note that not all numbers in the **Number Manager** will be listed in the table on this screen. Only numbers with an assigned/active **Call Flow** destination (such as a ring group or IVR) will be displayed. All other numbers in the **Number Manager** are only available when creating new call flows.



Call Flow Menu

In the list of existing call flows, the **Type** (Internal or External) and **Extension Name** are listed. There is also an additional option to remove the call flow completely.

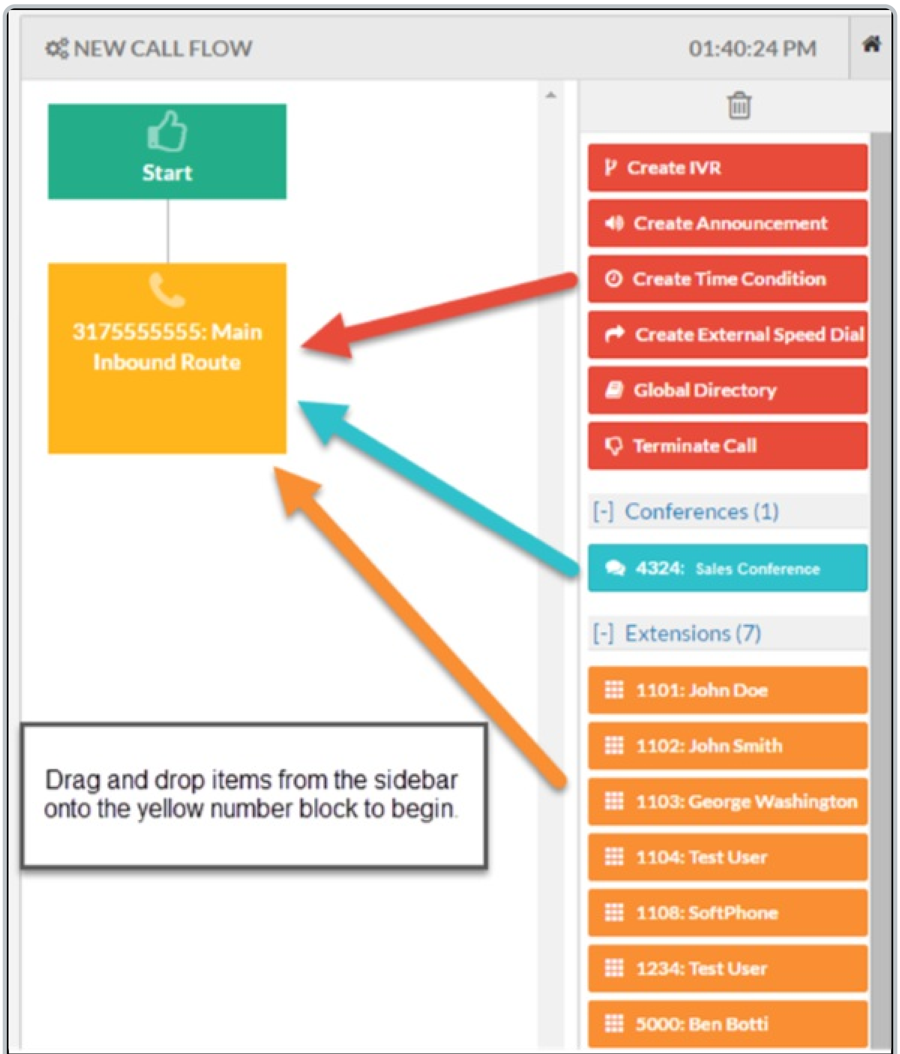
Call Flow Tools

Last Modified on 04/24/2019 1:11 pm EDT

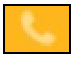
The **Call Flow Wizard** utilizes a simple drag and drop interface that allows administrators to easily configure call routing destinations. The interface uses a hierarchical tree which shows exactly how calls to a particular number will be routed.

When entering the **Create New Workflow** wizard, a list of possible destinations will be displayed on the right side of the screen. This sidebar will display all extensions, conference rooms, ring groups, etc. that are currently built into Kerauno. Selecting the **+** symbol next to a particular category will display all available options of that type.

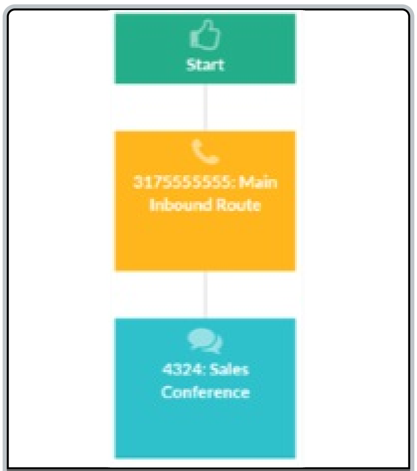
The objects in red at the top right of the screen will allow administrators to create additional options that do not need to be built elsewhere in Kerauno. Some examples of these are IVR menus (press 1 for Sales, 2 for Support, etc.), Caller Announcements, Time Filters, and the Global Directory.



Entering Create New Workflow Wizard

To begin building a new call flow, simply click and drag the desired destination from the menu on the right on to the yellow **number** box identified by the  symbol. For example, if you wanted the number above (317555555) to route directly to Conference Room 4324, simply click and drag the 

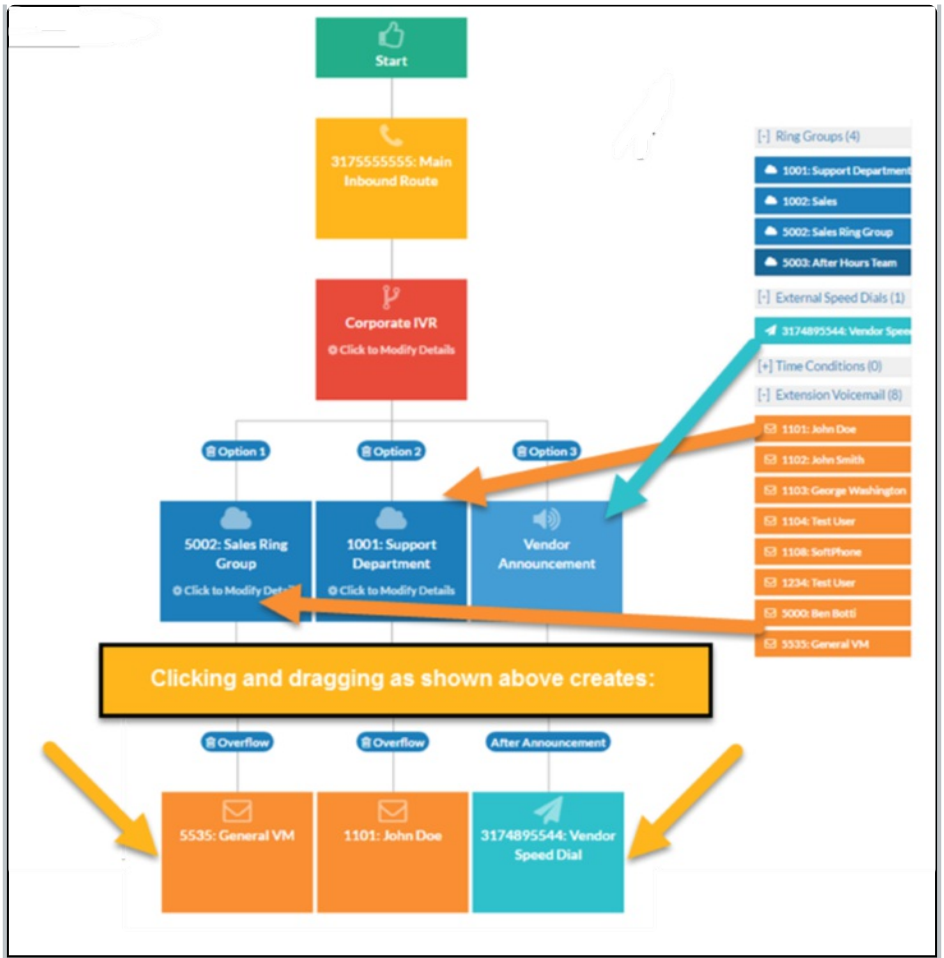
button from the sidebar onto the  box on the left. The destination will be added to the call flow and the administrator will be able to see that a new layer **4324:Sales Conference** has been added to the call flow tree. The end-result of this action is shown to the right.



Updated Call Flow Diagram

For some call flow objects, administrators may create layered destinations which expand to new levels of the call flow tree. For example, if a call to a ring group is not picked up because all agents are busy, a failover destination may be configured. Another example choosing where the caller goes after an announcement is played. Adding new layers to the tree can be done by dragging an object from the sidebar onto the lowest level of the call tree. The ability to add multiple options and layers to the call flow will allow administrators to build complex multi-level call flows in a very intuitive way.

In the below example, the Sales Ring Group has an overflow destination that sends the caller to Ext 5535 - General Voicemail. The Support Department Ring Group has an overflow destination that sends the caller to Ext. 1101 – John Doe Voicemail. The Vendor Announcement has an after announcement destination the sends the caller to an external ten digit-Vendor Speed Dial.



Sample Call Flow

Call Routing

Last Modified on 07/27/2018 9:51 am EDT

The **Call Routing** menu controls all aspects of call routing in Kerauno. Using this interface allows an administrator to quickly and easily set destinations for callers when dialing a particular telephone number. The **Call Flow Tool** allows for a visual representation of call routing that allows administrators to easily build routes that lead to IVRs, Ring Groups, Voicemail boxes, and more. The **Call Routing** menu may also be used to build and configure parking lots, ring groups, speed dials, and to block numbers via the Blacklist.

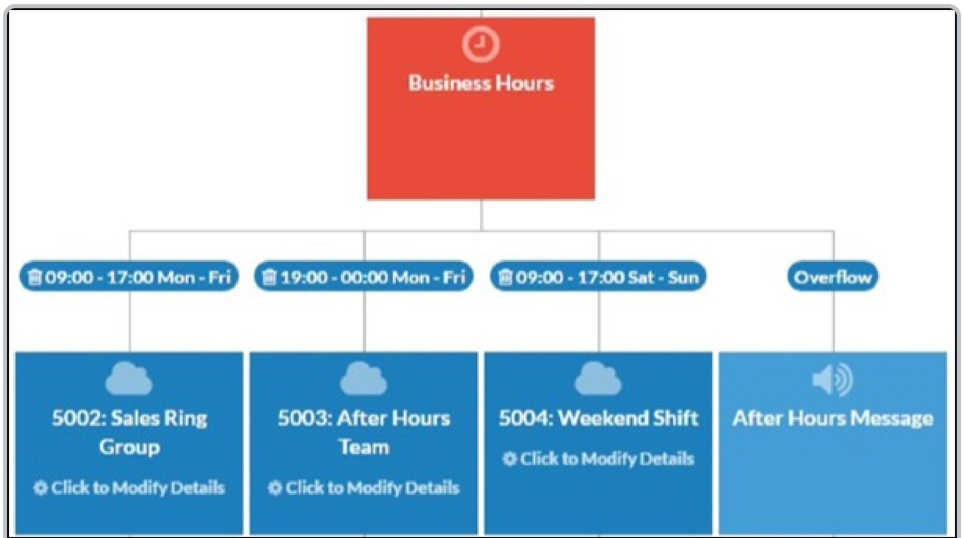
Create Time Filter

Last Modified on 05/25/2018 9:31 am EDT

A time filter allows administrators to route calls based upon the time of day and day of week, or specific day of year. For example, using this call flow object, calls can be routed to a specific ring group between 9:00 am – 5:00 pm Monday through Friday. Inbound calls that occur outside of that time frame can be sent to another destination, such as a general company voicemail box or "After-Hours" message. Some potential applications of time filters are determining routing of the phone system after a businesses' operating hours or routing calls to a different shift of employees during a certain time frame.

In the example to the right, multiple time filters are in place to route calls to a number of ring groups. The following time filters are set:

- 9:00 am – 5:00 pm M-F
- 7:00 pm – 12:00 am M-F
- 9:00 am – 5:00 pm Sat-Sun

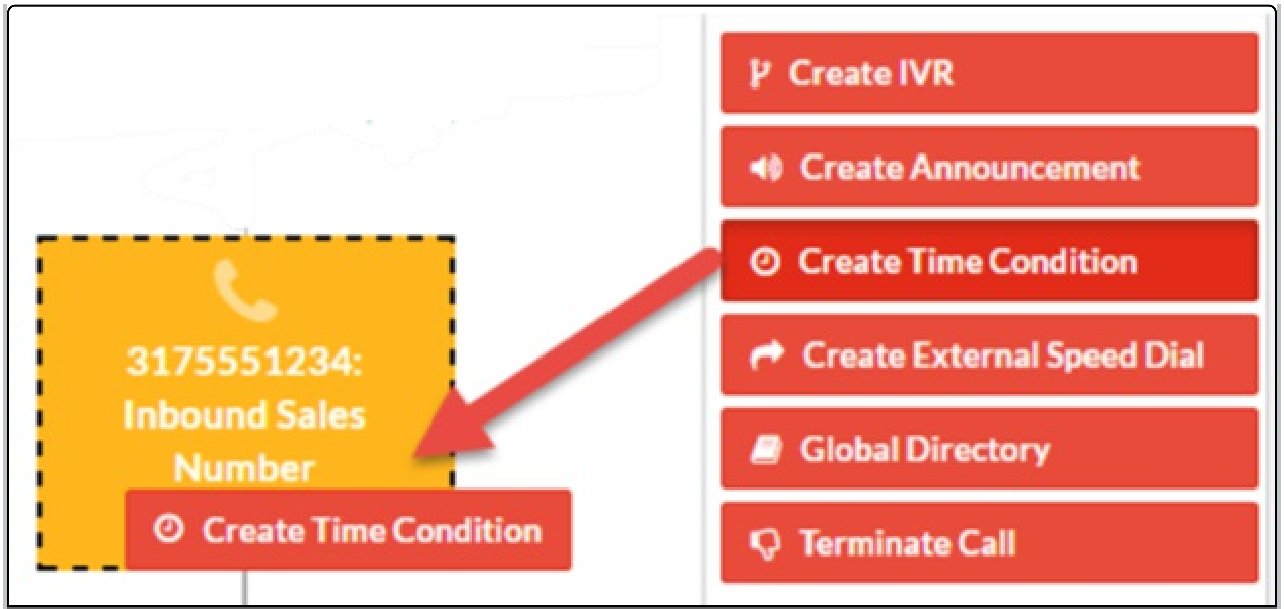


Multiple Time Filters Example

Anything that does not meet one of these 3 ranges, will go to the location listed under **Overflow** destination.

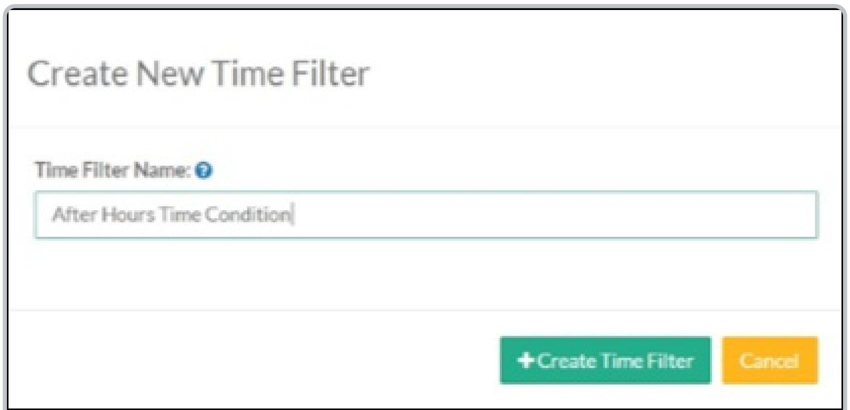
To create a new time filter, click and drag the 

button to the desired location on the call flow tree as shown in the image below.



Create New Time Filter

After doing so, a pop-up will appear that asks the administrator to give an easily identifiable name for the time filter as shown in the image below.



Create New Time Filter Name Pop-up

After giving the time condition an easily identifiable name (Ex: “After Hours” or “Start of 2nd Shift”, etc.) select the green **+Create Time Filter** button. The Time Filter object will be added to the call flow tree and the administrator will be taken back to the main **Callflow Tool** screen.

Delete an Existing Call Flow

Last Modified on 04/24/2019 11:31 am EDT

Call Flows allows for a visual representation of call routing that allows administrators to easily build routes that lead to IVRs, Ring Groups, Voicemail boxes, and more. If an existing call flow is no longer valid, it can be removed/deleted. To delete a call flow, in the table of existing call flows, select the **–Remove Callflow** button next to the call flow you want to delete.

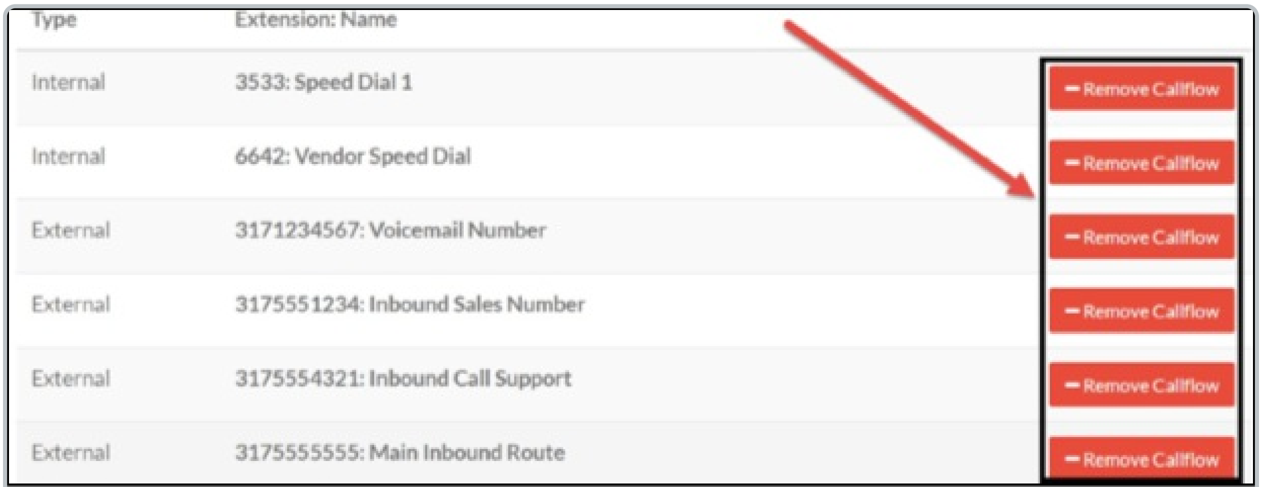


Table of Existing Call Flows

A confirmation will appear ensure that the correct call flow is being deleted. At the confirmation, select **Yes** to remove the call flow. Kerauno will then return to the main **Call Flow** menu after the particular call flow has been removed.

Please note that when a call flow is deleted, it does not remove the number from Kerauno. In order to completely delete the number, administrators will need to delete it from **System Admin > Number Manager.**

IVRs

Last Modified on 04/24/2019 11:50 am EDT

IVRs – Interactive Virtual Receptionist

An **IVR** is an Interactive Virtual Receptionist that routes callers to their desired destination. IVRs set-up a menu that will play an initial recording to callers and then route their call based on their selected dial an option or an extension number (e.g., For Sales - press 1, for Service - press 2, etc.). In an IVR, Kerauno routes the call to a specific location based upon what the caller dials.

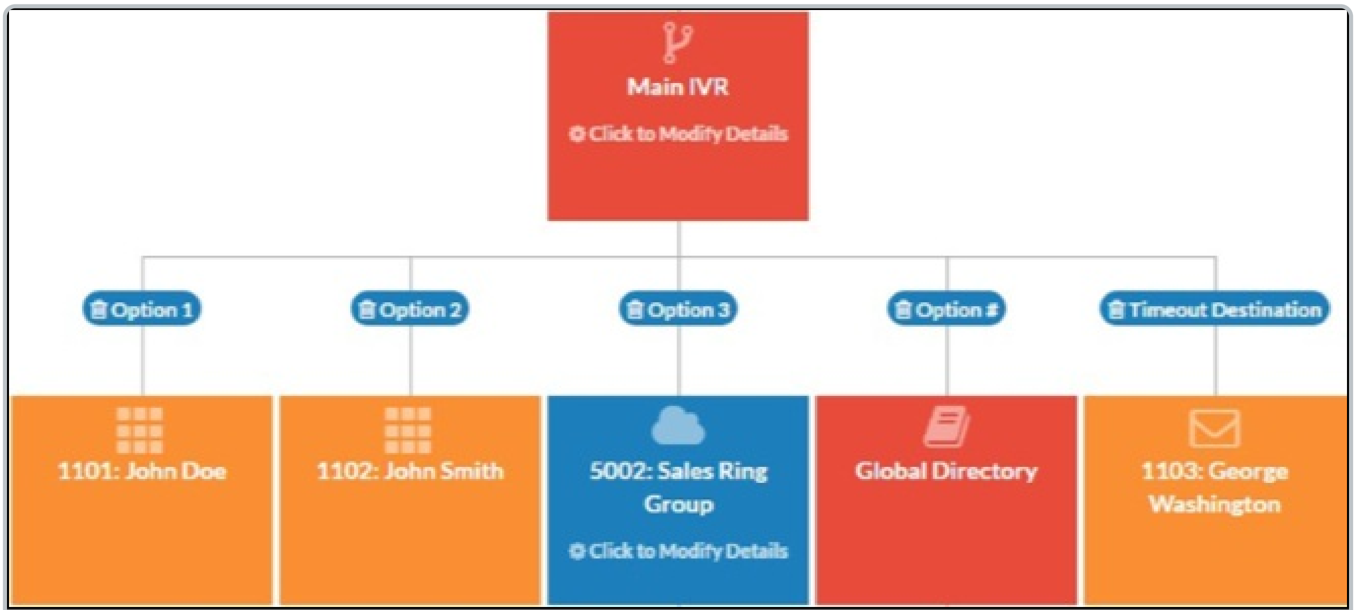


Figure 01: IVR Illustration

The options connected to an IVR can be routed to any other destination or call flow object. This includes extensions, ring groups, voicemail boxes, company directories, or even another IVR. IVRs are able to route based on any digit (0-9), asterisk (*), and pound (#). There are also options for timeout destinations (if the caller presses nothing) or if the caller enters an invalid key.

To create a new IVR, click the Create IVR button from the side bar and drag it to the desired location on the call flow tree. In the example to the right, a new IVR will be created as the first object the caller hears because it has been dragged over the box.

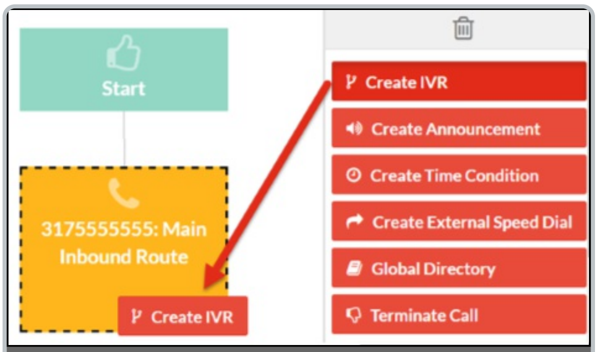


Figure 02: Create New IVR

After dragging the IVR onto the call flow tree, a pop-up will appear that allows the administrator to specify a name for the IVR. This name will be how the IVR is identified in the call flow tool. (Ex. Main Sales IVR, Main Support IVR, Corporate IVR, etc.) The other option listed in this pop-up is the **Direct Dial to Extensions** option. If this option is checked callers are able to dial directly to an extension while listening to an IVR. To activate this option select the Direct Dial to Extensions? checkbox on this screen. If a caller dials into the IVR, they may enter the desired party's extension at any time and their call will ring directly to the extension dialed.

To add options to an IVR, click and drag an object from the sidebar that you would like to add as a routing option. In the below example, clicking and dragging the **Support Department Ring Group** over the IVR box will allow the ring group to be added as an available route.

Figure 03: Add Available Route

After dropping the desired destination onto the IVR, Kerauno will open with a screen that allows administrators to select which digit the caller must press to route to this destination.

Figure 04: Select Routing Number

Any digit between (0- 9) as well as the asterisk (*) and pound (#) keys are all available option. Note that there is also an option to set a **Timeout** and **Invalid Retries** destination for when a caller does not press anything or presses an invalid key that has no destination set.

Once a digit for the option has been selected, the destination is added as a new level in the call flow tree as. Repeat this process to add multiple routing destinations to the IVR as shown in the figure below.

NOTE:	Be sure to set a **Timeout** and **Invalid Retries Destination** for all IVRs. If one is not set, the call will be terminated when the maximum timeout or maximum invalid retries limit has been reached.

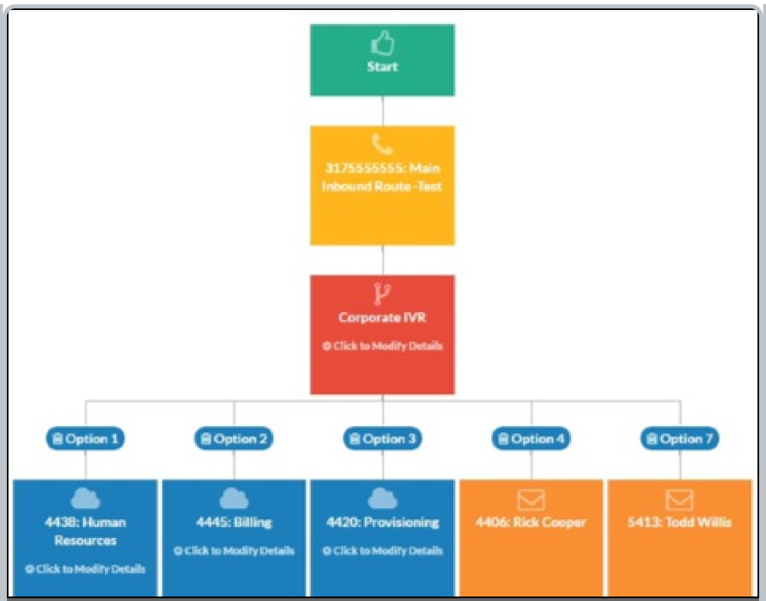
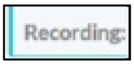


Figure 05: Updated Call Flow Diagram

Available Voice Message Options

After the IVR has been created and configured with the desired options, click the IVR in the Callflow tool to open the **IVR Info** menu. This menu allows administrators to further configure the IVR and choose which voice messages will be played to callers. The available options are detailed as follows.

Recording Greeting

Click the 

button to select a recording to play when callers reach this IVR. The recordings here must be first built under the **System Admin > Announcements** menu. Be sure to include an explanation of all available IVR options, such as Press 1 for Sales, 2 for Support, etc.

Invalid Retries

This value is the number of times the IVR will allow the caller to press an incorrect key before going to the designated fail over destination. (Example: An IVR has options configured to the 1, 2, and 3 keys. A caller dials in and continually presses 4.)

Maximum Invalid Retries Recording

The recording set here will play when the maximum amount of “Invalid Retries” has been hit. Recordings here must be first built under the **System Admin >**

Announcements menu.

Invalid Retry Recording

Checking the 

box will allow a recording to play after each incorrect digit is pressed. Recordings here must be first built under the **System Admin > Announcements** menu. If no recording is set, the "Recording Greeting" will be replayed each time an invalid key is pressed.

Timeout

The **Timeout** is the value in seconds which the IVR waits for the caller to select an option. This value can be set anywhere between 0-60 seconds.

Timeout Retries

The **Timeout Retries** value is number of times the IVR will allow the caller to timeout before going to the designated fail-over destination or terminating the call.

Max Timeout Retries Recording

Recording that will play when the maximum amount of timeouts has been reached. Recordings here are pulled from the **System Admin > Announcements** menu.

Timeout Retry Recording

Checking the 

box will allow recording to play each time the timeout limit has been reached. Recordings here must be first built under the **System Admin > Announcements** menu.

When done modifying these options, be sure to select the 

button to save your changes.

Using an External Speed Dial as a Bridge to a Call Flow

Last Modified on 08/16/2018 9:54 am EDT

If you want to go to an **Internal Call Flow** that is not tied to an **External DID** you can utilize an **External Speed Dial** as a bridge to a **Call flow**. Follow the steps outlined below:

Create a **Call Flow** attached to an **internal Number**. You can name it anything and use an unused extension.

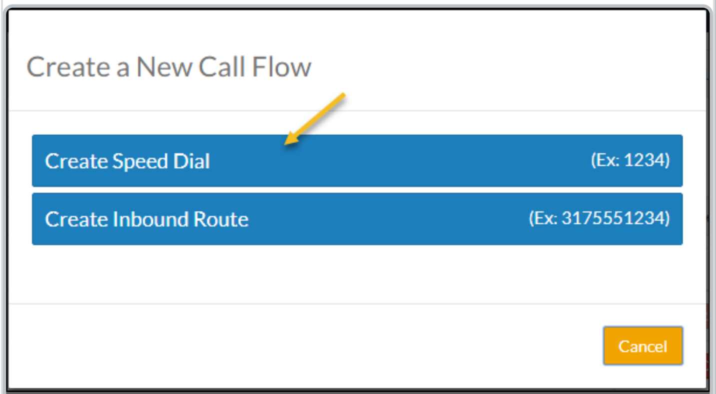


Figure 01: Create a New Call Flow

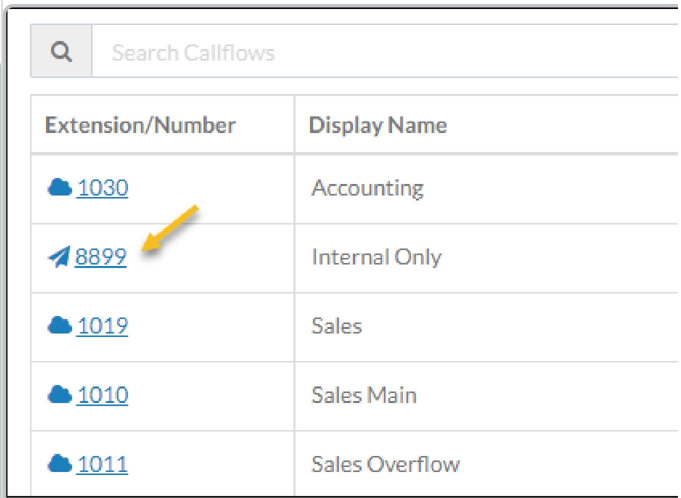


Figure 02: Selected Extension

While in the call flow that you have created, **Create an new External Speed Dial** by dragging a **New External Speed Dial** to an **IVR Object** already in a call flow. This will act as a bridge object in the call flow. In the creation dialog, the **Extension** may be any unused extension; however, in the **External Destination** put the extension of the **Internal Call Flow** you would like to reach.

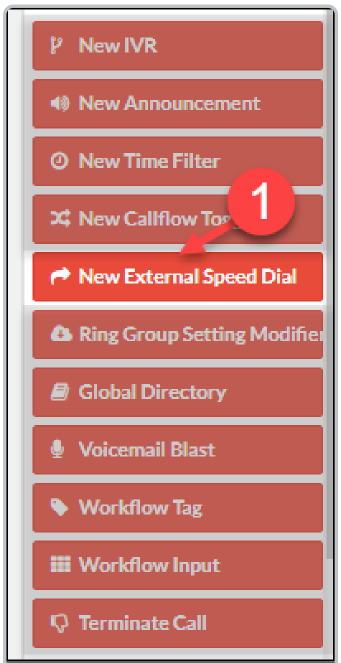


Figure 03: New External Speed Dial Menu Option

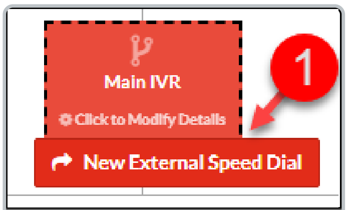


Figure 04: IVR New External Speed Dial Option

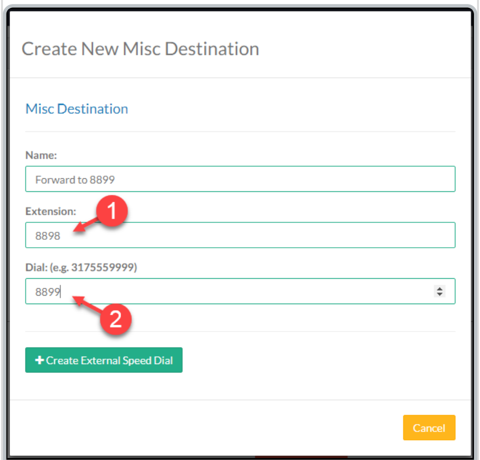


Figure 05: Create New Misc Destination Dialog Box

When the **IVR Destinations** dialog box is displayed, select **+New Destination**. For the custom destination enter the number you would like to be used as the selector. In this case you could use the number associated to the **Internal Call Flow** you actually want to reach.

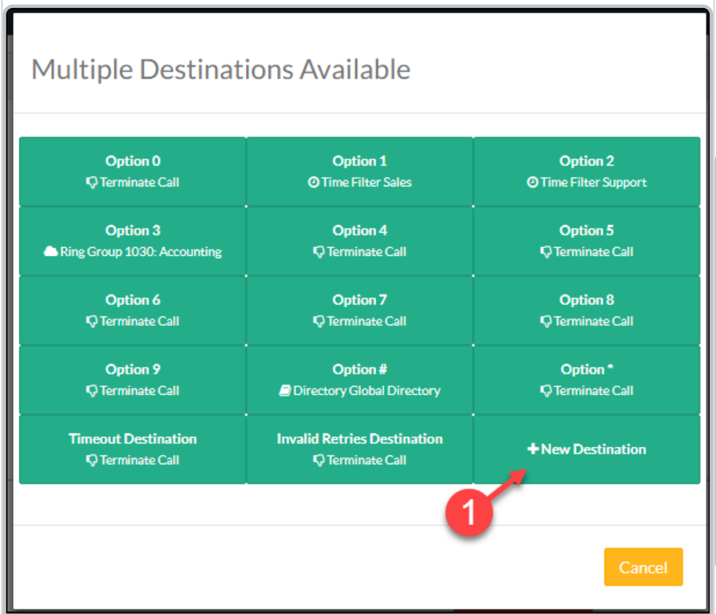


Figure 06: Multiple Destinations Available Dialog Box

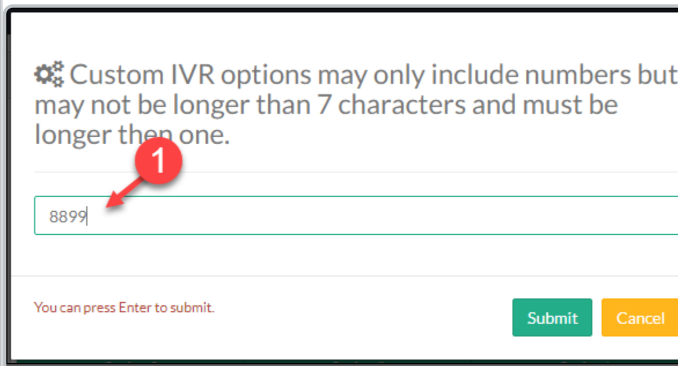


Figure 07: Custom IVR Options Dialog Box

Enabling SMS

Last Modified on 10/01/2019 2:26 pm EDT

SMS is available for users on 3.1 and higher, excluding premise enterprise customers.

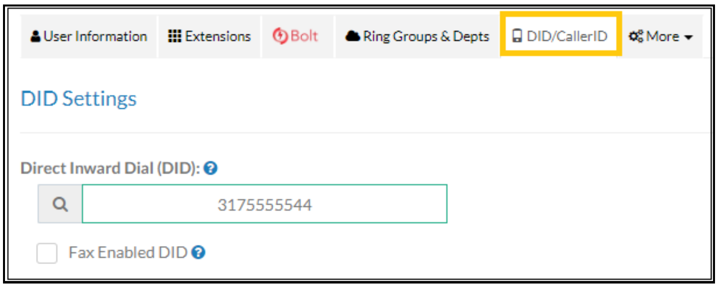
The Short Message Service (SMS) feature within Kerauno allows end users to collaborate over, route, queue, and escalate text messages from internal personnel and external stakeholders.

SMS must be enabled at the carrier level before completing the steps below. Contact sales@keraunouc.com for more information.

Note: No changes are required to existing voice services and architecture; SMS services function independently from existing carrier, voice architecture, and voice functionality.

SMS Provisioning in Kerauno

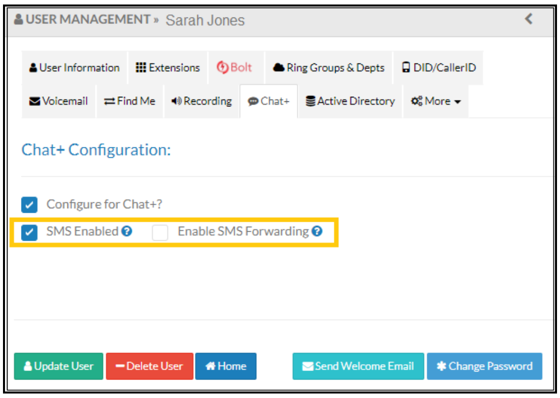
Once the numbers are ported, enable SMS within Kerauno. Select the appropriate user to provision SMS from the Users & Devices menu. Navigate to the DID/CallerID tab for the user and set the 10 digit DID number.



Update the user and apply changes. Select the user again and click the Chat+ tab.

Click the SMS Enabled checkbox to enable SMS. Once clicked, an SMS Forwarding checkbox displays. When selected, SMS messages are routed to the user’s mobile device (make sure the mobile number is captured on the User Information tab).

SMS forwarding is helpful for users that do not always have the app open. Users can respond directly via mobile or respond via DID number. Messages sent directly to this user’s DID are not forwarded.



Update the user and apply changes. Next, update or create an [SMS Flow](#) and assign the new number accordingly.

Note: Review Premise-based Kerauno instance requirements to accommodate SMS [here](#).

SMS Roll Out Best Practices

- Test all SMS connections as part of the communication to each SMS user.
- Suggested email content for new SMS users:
  - Your SMS number is: ______________
  - This number is now active in the following Kerauno SMS flows: ______________
  - A test message has been sent to this number. Please respond to this email if you did not receive it.
  - Here is what you can expect going forward using SMS:

SMS Flows

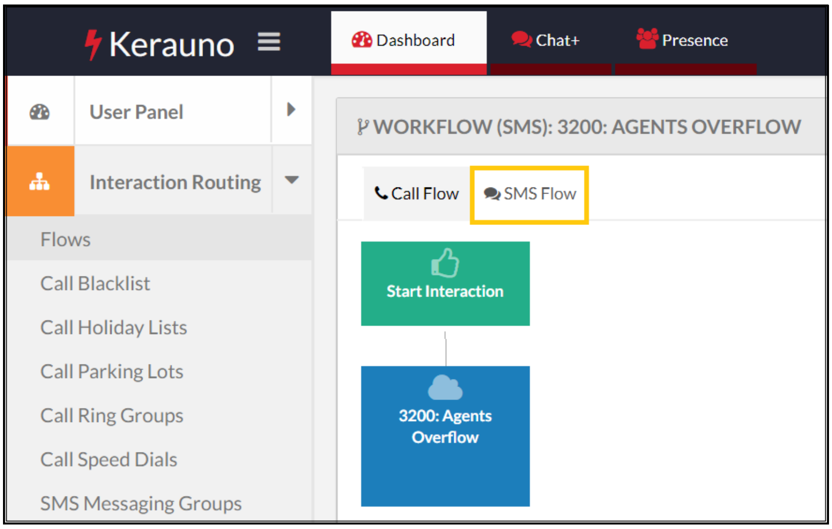
Last Modified on 10/01/2019 2:27 pm EDT

SMS is available for users on 3.1 and higher, excluding premise enterprise customers.

An SMS Flow is easy to create based on what you are already familiar with for Call Flows:

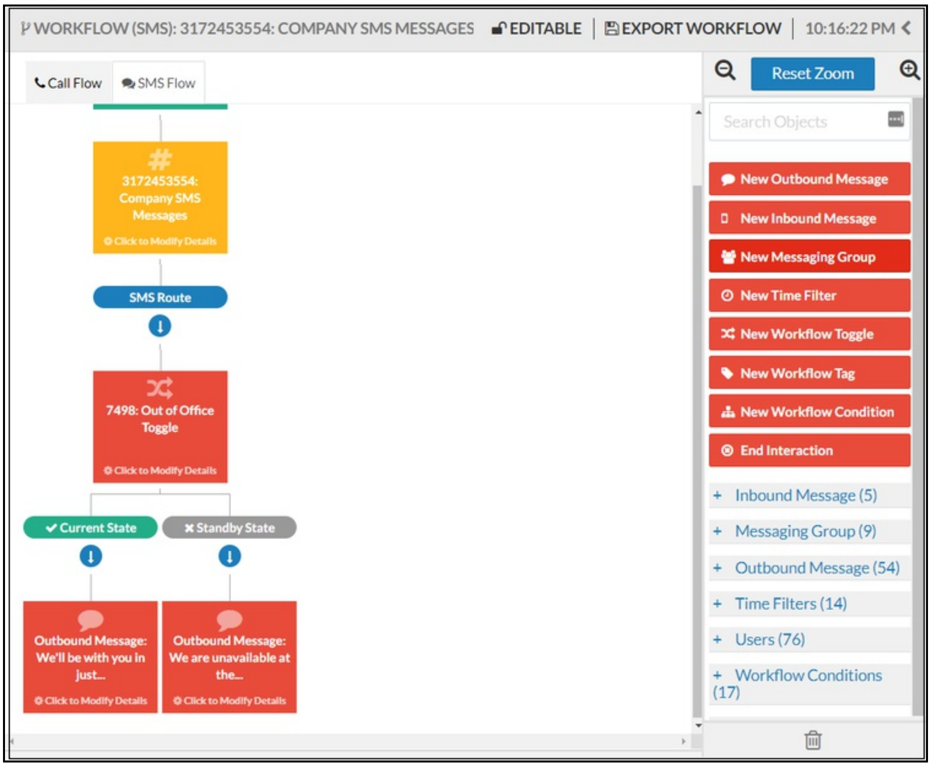
Your browser does not support HTML5 video.

Flows utilizing a 10 digit number can utilize SMS. SMS Flows are created under Interaction Routing > Flows. Similar to a call flow, each SMS flow must have a unique DID number. Select the appropriate workflow and click the SMS Flow tab at the top of the canvas.

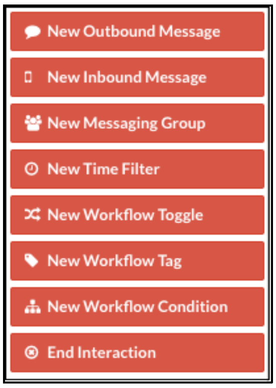


SMS Flows are independent of Call Flows with the exception of sharing Time Filters and Toggles.

SMS Example Flow



SMS flows are built in a similar manner to call flows by dragging and dropping the destinations available on the right side of the screen onto the canvas.

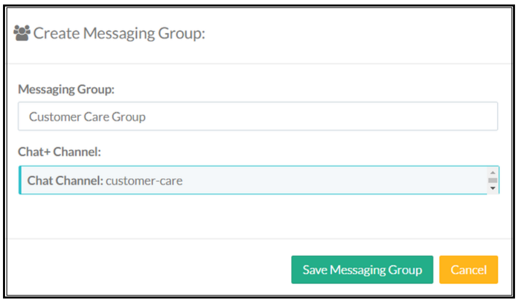


.

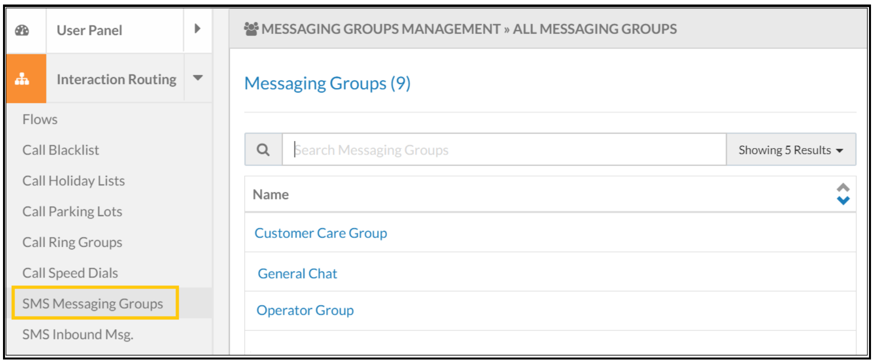
New Messaging Group

This destination is used to route an interaction to a group, where one of the members can accept the request. An interaction routed through a Message Group can appear as a private or public Chat+ channel. Unique Chat+ channels can also be created for each individual messaging group.

Note: Whomever creates a new SMS flow must also add themselves as a member of the group. Once the flow is created and tested, they can remove themselves. Otherwise, the flow will be inactive.

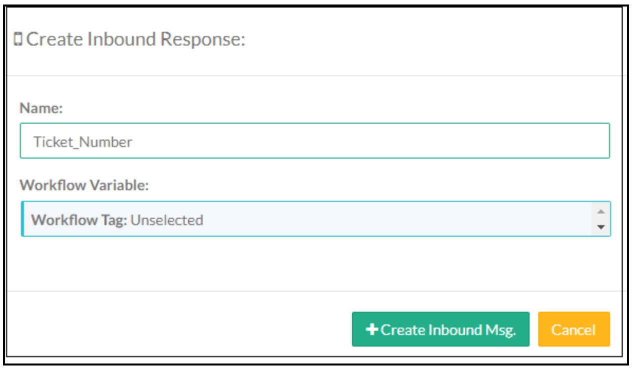


SMS Groups are managed from Interaction Routing > SMS Groups.

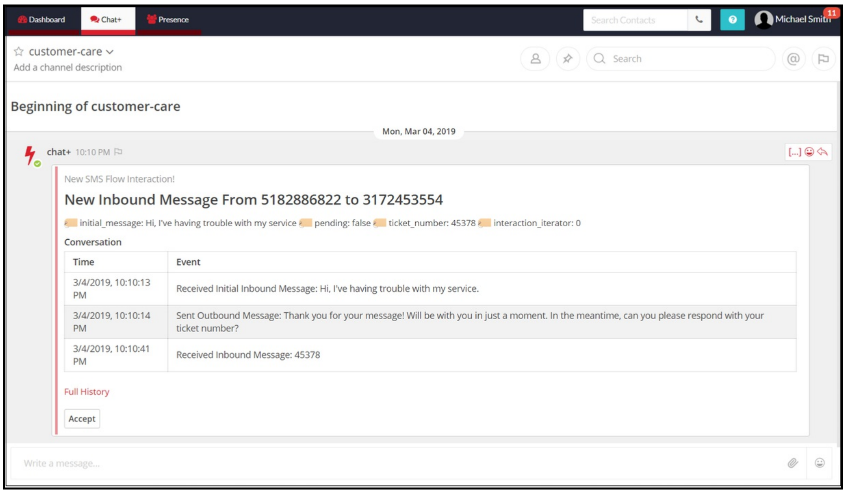


New Inbound Message

This destination is used to route an interaction based on Workflow Conditions and Workflow Tags applied to the destination.

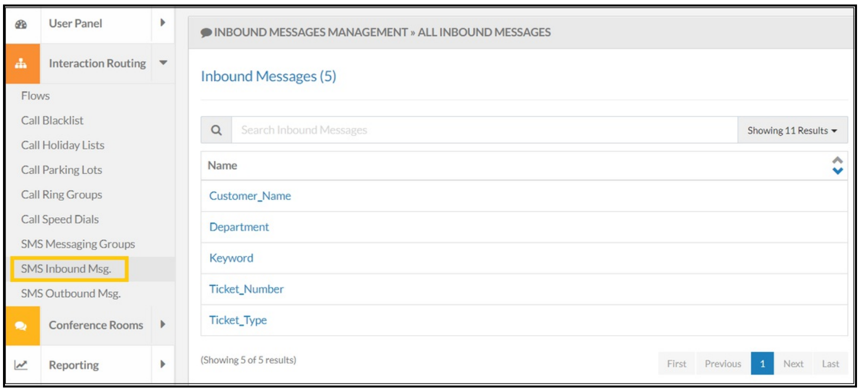


Example Inbound Message to a Messaging Group:



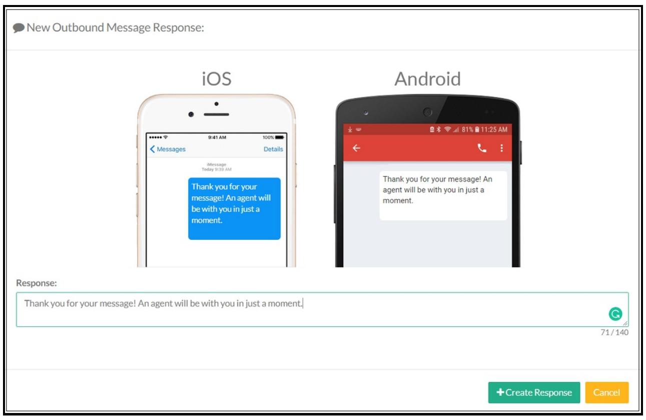
An available member of the messaging group clicks **Accept** at the bottom of the message to handle the interaction in a separate channel.

Inbound Messages are managed from Interaction Routing > SMS Inbound Msg.

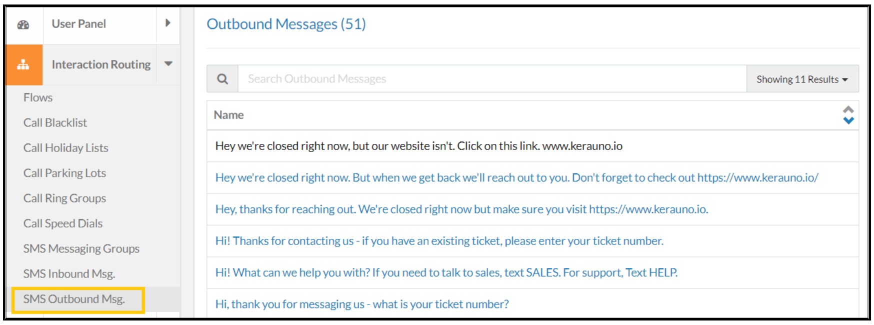


New Outbound Message

Use this destination to specify a response to an Inbound Message. Content is limited to 140 characters.



Outbound Messages are managed from Interaction Routing > SMS Outbound Msg.



New Time Filter

Use a time filter destination to route inbound SMS messages based on a specified time. Typical time filters include standard working hours, after hours, and holidays.

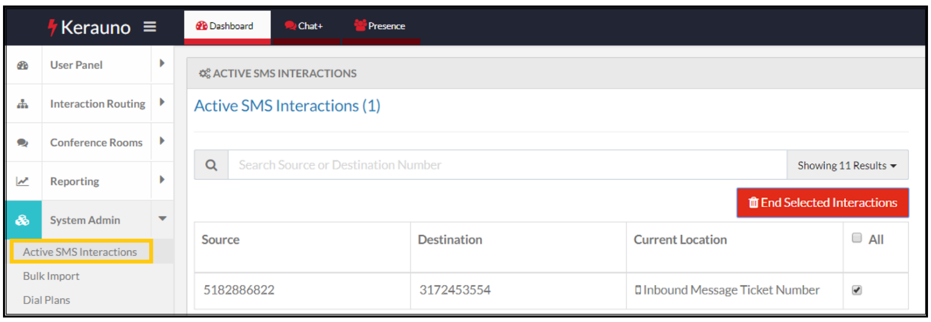
New Workflow Toggle

A Workflow Toggle is a top-level node allowing users to switch the state of an SMS Flow; sending it down one of two paths. A toggle can only be placed at the top of each SMS Flow and can only occur once in an SMS Flow. Change the state of a Workflow Toggle in one of three ways:

1. SMS - Text in the number the word TOGGLE.
2. UI - Modify the toggle directly.
3. Voice - Call the extension to switch the toggle and enter your pin number (the extension associated with the toggle).

View Active SMS Interactions

An Administrator or Installer can view and end open SMS interactions from System Admin > Active SMS Interactions. The **End Active Interactions** button is helpful to avoid progressing through an entire workflow to end it.



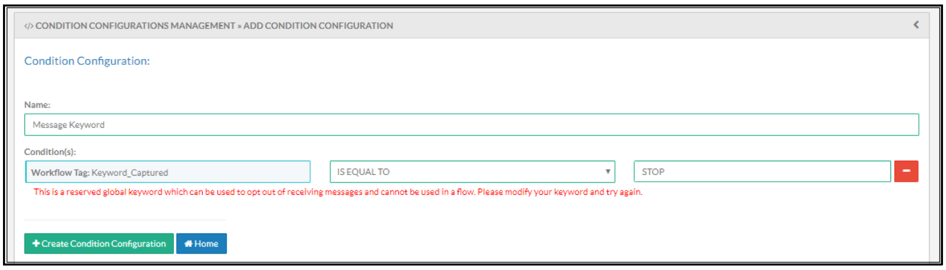
Restricted Keywords

The list below contains industry recognized keywords to allow users to opt-out of SMS at the carrier level. An opt-out option is required when using SMS. These words cannot be utilized in conditional routing within Kerauno flows.

Note that these are *not* case sensitive but workflow condition names in Kerauno *are* case sensitive.

Do Not Use	Suggested Alternatives
STOP	EXIT, DONE, CEASE
STOPALL	LEAVEALL, DISCONTINUE
UNSUBSCRIBE	DECLINE, OUTOUT, HALT
CANCEL	DISREGARD, VOID, UNDO
END	DROP, EXIT, TERM, CLOSE
QUIT	DONE, LEAVE, FINISH
HELP	OPERATOR, ASSISTME, SUPPORT, SERVICE
INFO	INFORM, DETAILS, NEWS
START	GO, CONFIRM, JOIN, BEGIN
YES	Y, CONFIRM, PROCEED
UNSTOP	RESUME, RESTART, RENEW

If one of the above keywords is used, the user is notified:



SMS Reports

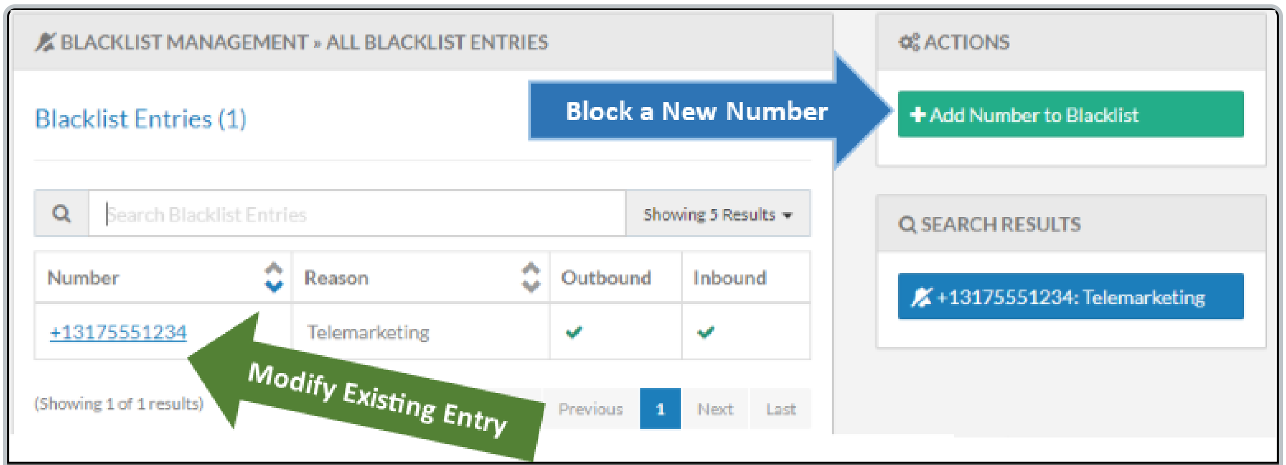
Two reports are available to collect SMS metrics.

Note: Review Premise-based Kerauno instance requirements to accommodate SMS here.

Blacklist

Last Modified on 09/12/2018 12:49 pm EDT

The Kerauno **Blacklist** allows administrators to completely block inbound and outbound calls for a specific telephone number and caller ID. Administrators can use this feature to block numbers that are dialing them with spam messages or block telemarketers. To block a new number and add it to the blacklist, select the **Add Number to Blacklist** button from the **Call Routing** menu.

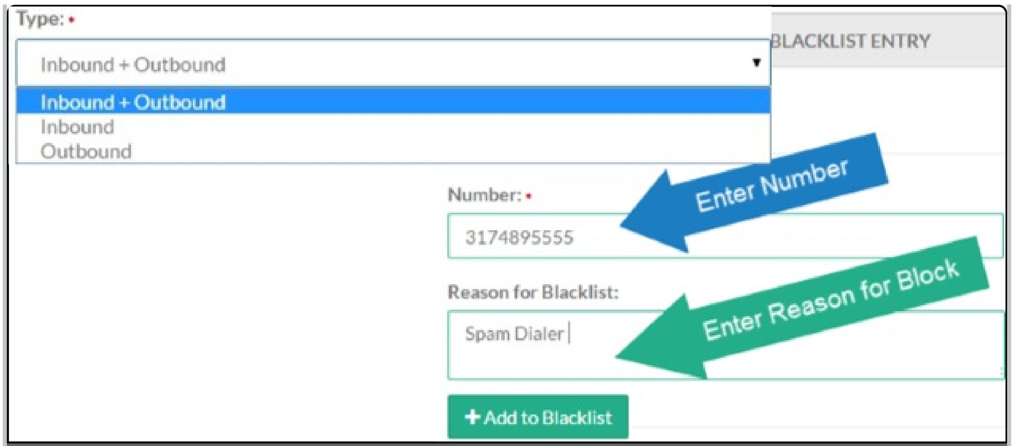


Blacklist Management Screen

After selecting the **Add Number to Blacklist** button, the administrator is brought to a screen that will allow them to enter details about the number they would like to block. The **Add Blacklist Entry** menu will appear with two fields.

In the **Number** field, the administrator will enter the Caller ID of the number that is to be blocked. This field accepts 10 digit numbers, 1-800 numbers, as well as international numbering plans. A prefix may also be used. For example, using the prefix 01152 will create a blacklist calls for the country of Mexico (011 Exit Code + Mexico Country Code 52).

Checking the **International** checkbox will prepend the international dialing code “011” to any number entered. This allows the administrator to enter a country code and check the box to indicate a block of that country code. For example, typing the country code for Mexico “52” and then checking the box would be the same as entering “01152” in the number field. The **Type** box allows administrators to choose to block **Outbound and Inbound** calls, only **Inbound** calls, or only **Outbound** calls. To change this setting, simply select an option from the **Type** drop-down box.



Blacklist Blocked Call Type Drop-Down

The second field on the page asks the administrator for the **Reason for Blacklist**. The **Reason for Blacklist** field is a free-form field where the administrator can enter details about why the number is being blocked.

Example: Recorded Spam Message, Telemarketer, etc. When done, select the **Add to Blacklist** button. The block on the number will be activated and the administrator will be returned to the main **Blacklist Management** screen.

Holiday Lists

Last Modified on 11/22/2019 12:43 pm EST

When creating time filter groups, custom parameters may be set for holiday filters that only occur on certain days of the year.

Open the call flow you want to add the holiday filter to then click and drag the **New Time Filter** option onto the call flow object you want the time filter to be after as illustrated in Figure 01 below.

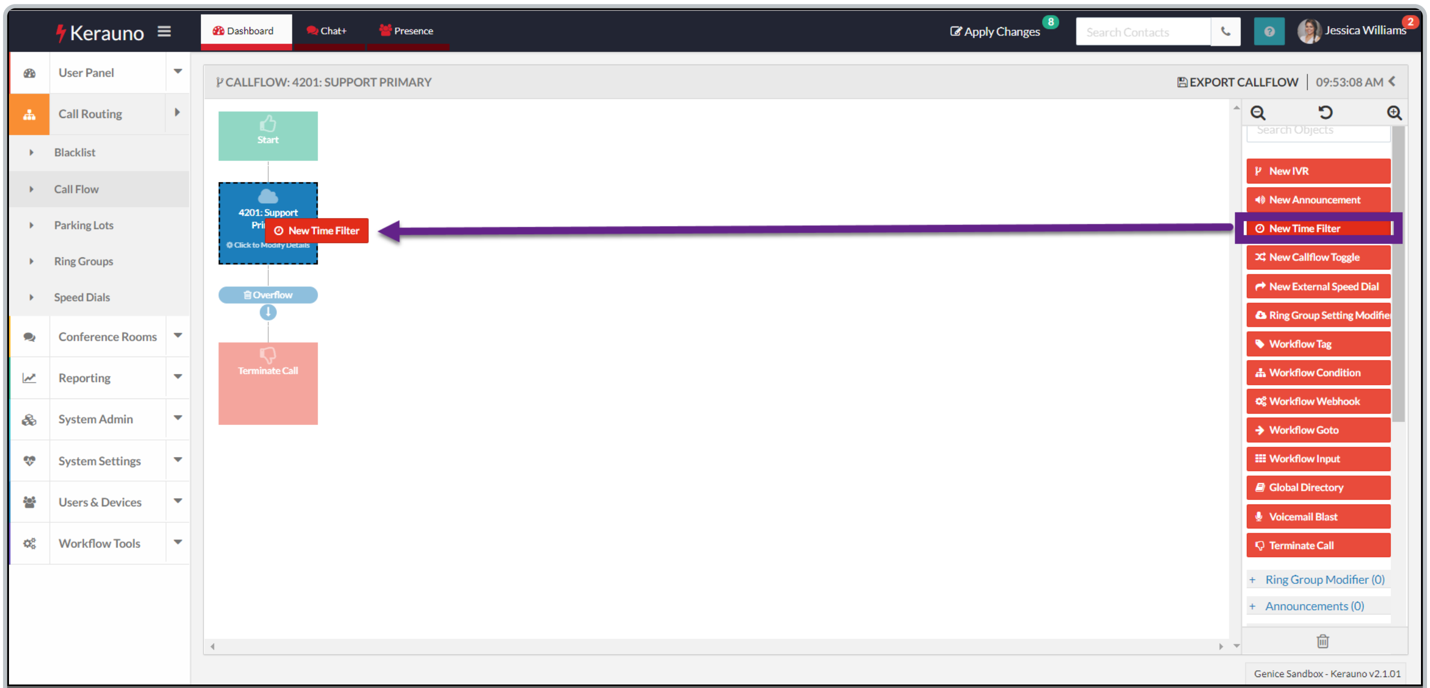


Figure 01: Adding New Time Filter

When you drop the **New Time Filter** object onto the call flow the **Create New Time Filter** pop-up is displayed as illustrated in Figure 02 below.

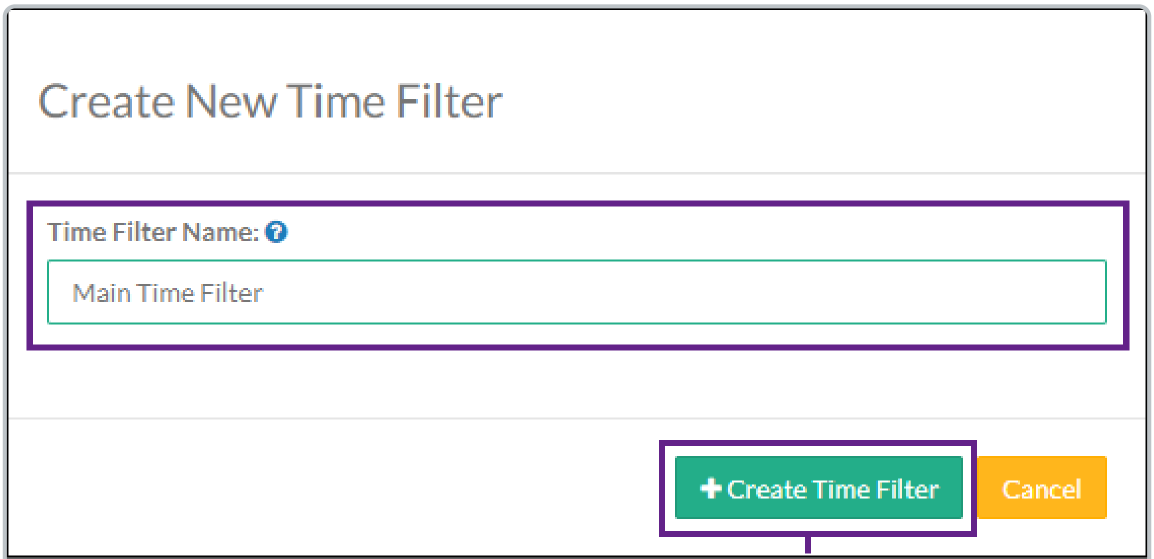


Figure 02: Create New Time Filter Pop-up

Enter a **Time Filter Name** to identify what the filter is for. In this example, because we're creating a holiday time filter, the name "Main Time Filter" is used. Click the **Create Time Filter** button to insert the time filter (refer to Figure 03 below).

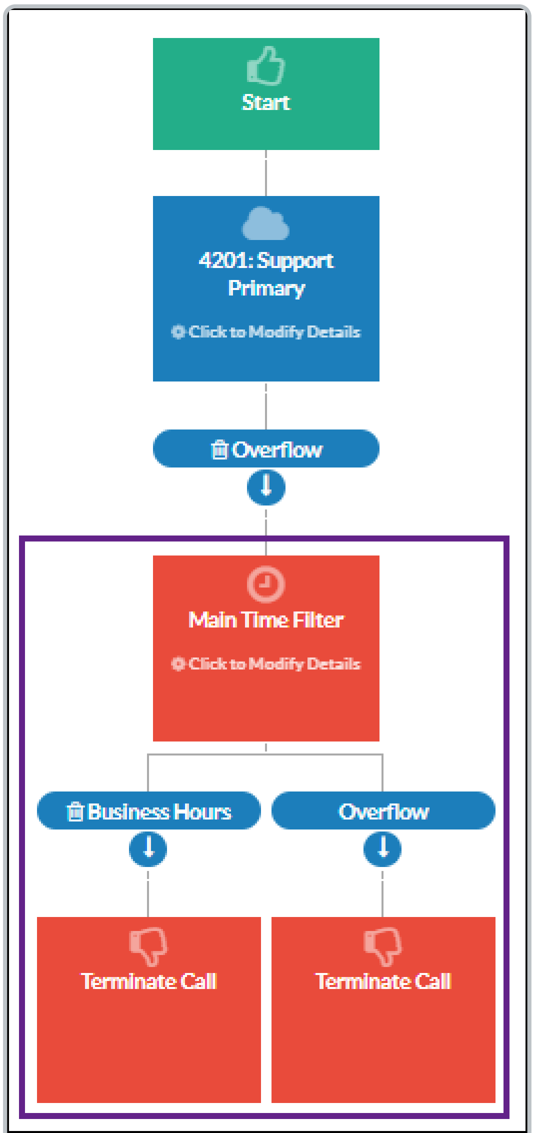


Figure 03: Inserted Time Filter

Click and drag an object from the list on the right to the new time filter as illustrated in Figure 04 below.

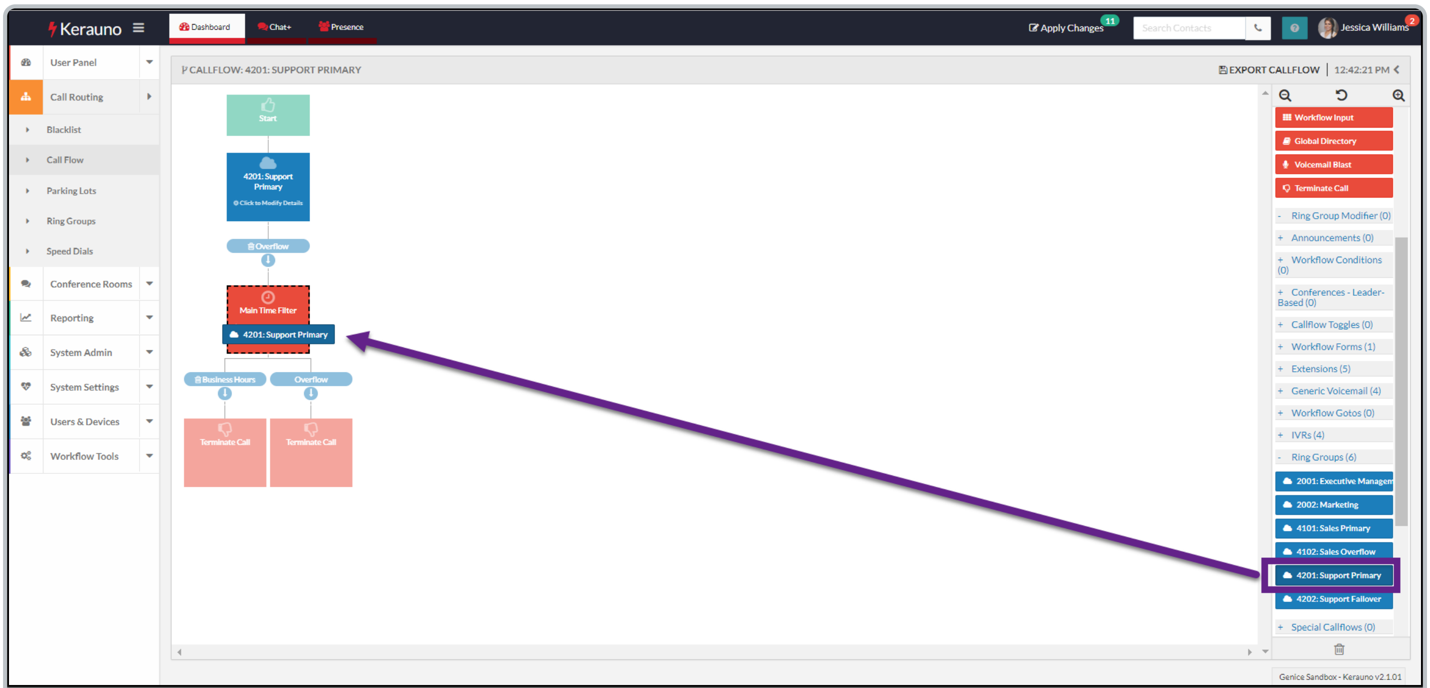


Figure 04: Add Object to Filter

This displays the **Multiple Destinations Available** pop-up as in Figure 05 below.

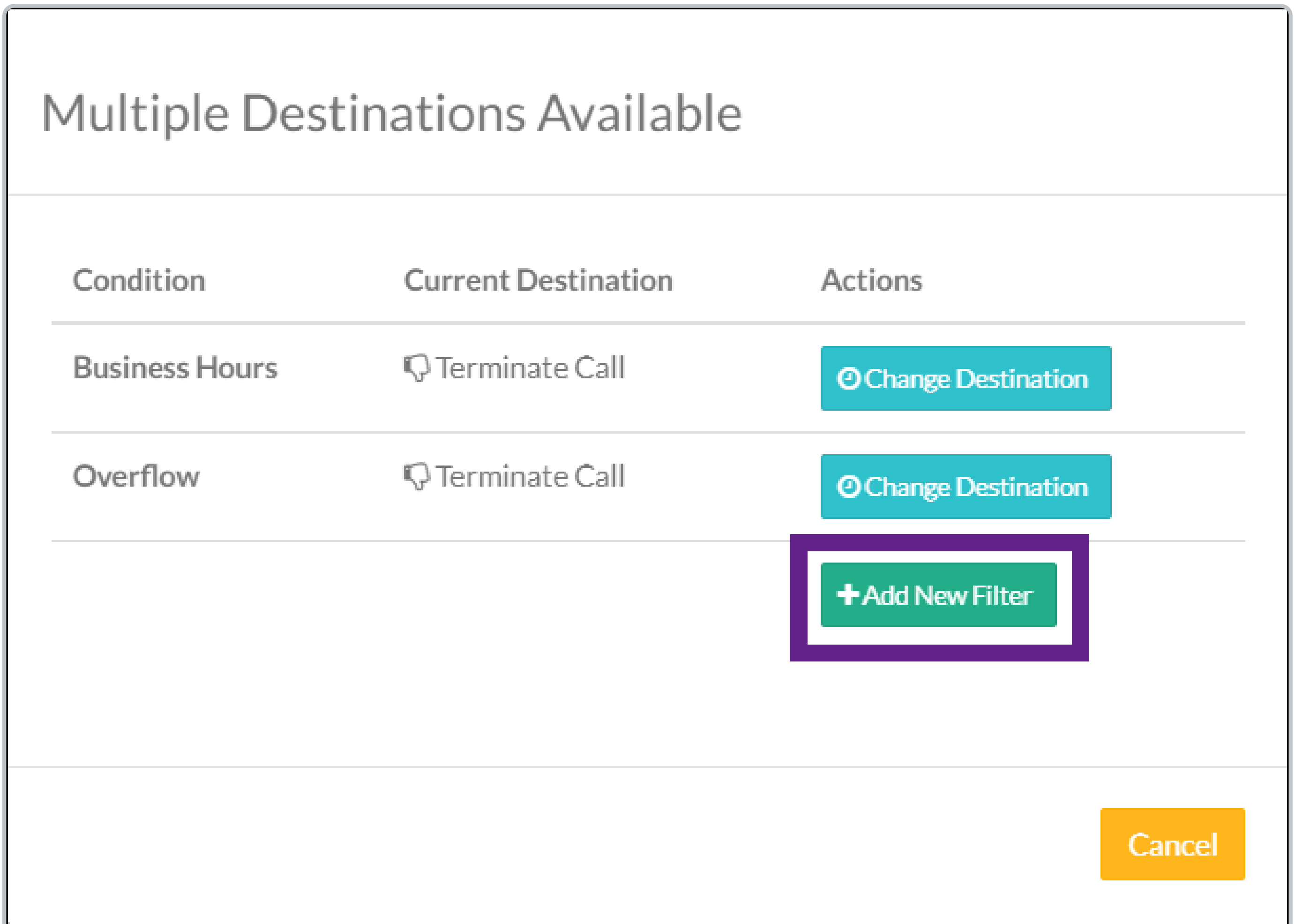


Figure 05: Multiple Destinations Available Pop-up

Holiday filters are enabled for a 24-hour period on a specific month/day of the year, while Week/Time filters can be set by time and day of week. Select the **Add New Filter** button to display the **New Time Filter** pop-up. Select the **Build Holiday Filter** button to begin creating your holiday filter (refer to Figure 06 below).

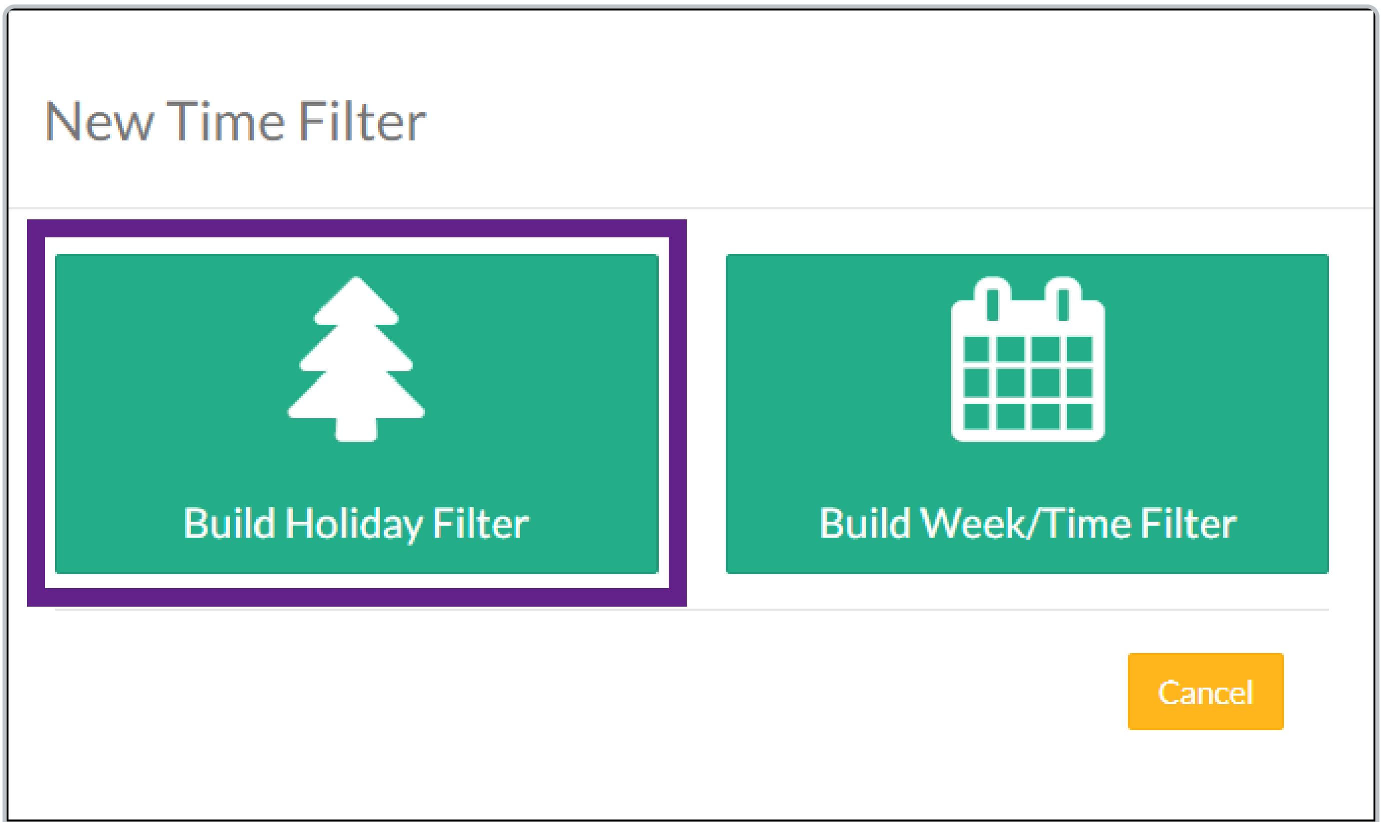


Figure 06: New Time Filter Pop-up

The **New Time Filter** pop-up for adding dates is displayed; it allows you to set dates for holidays as illustrated in Figure 07 below.

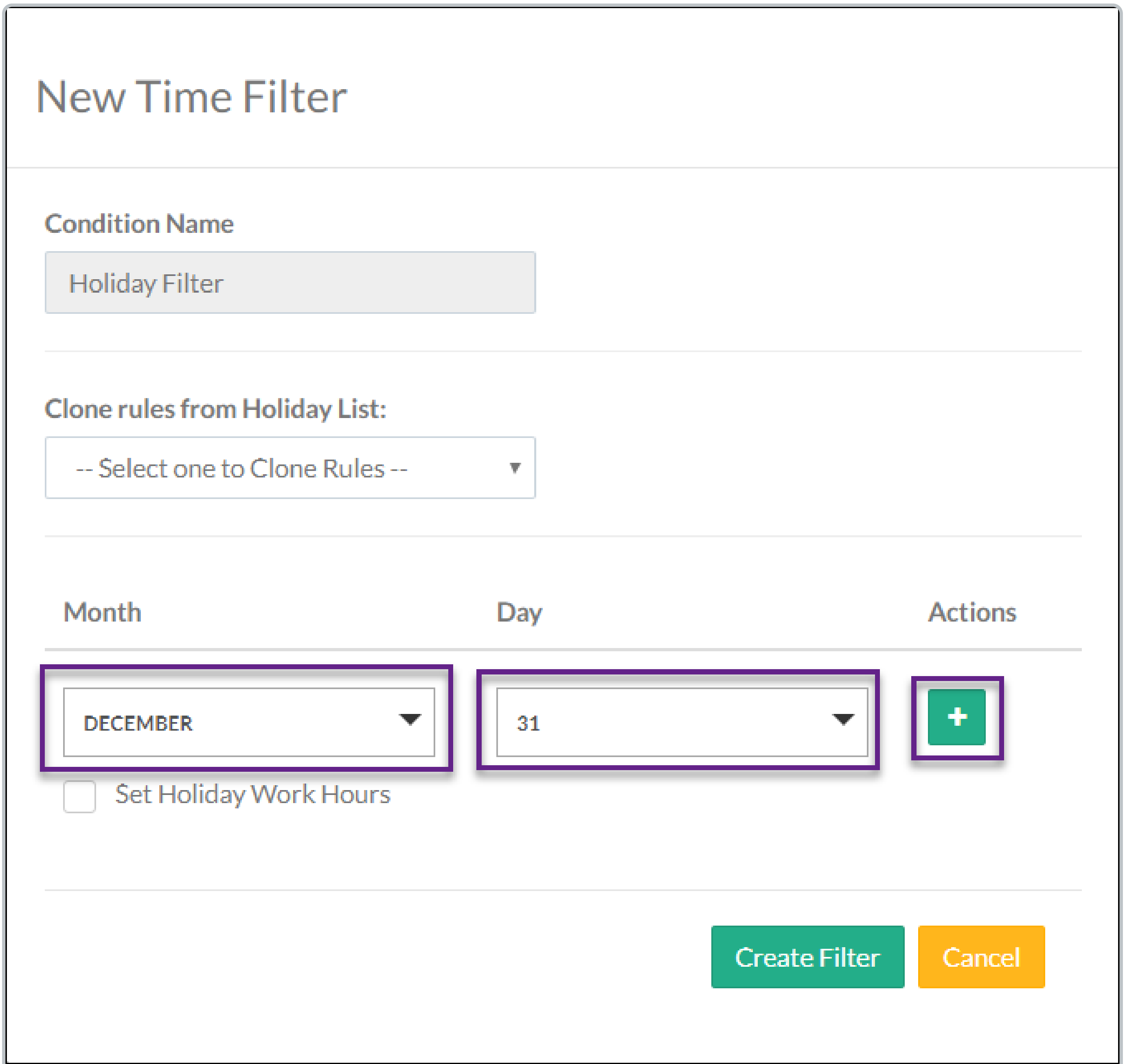


Figure 07: New Time Filter Pop-up: Add Dates

Select the **Month** and **Day** for the first holiday then press the plus button to add another row for the next holiday. Add as many rows as you need for your holidays. Once all your holidays have been added, select the **Create Filter** button at the bottom-right of the pop-up (refer to Figure 08 below).

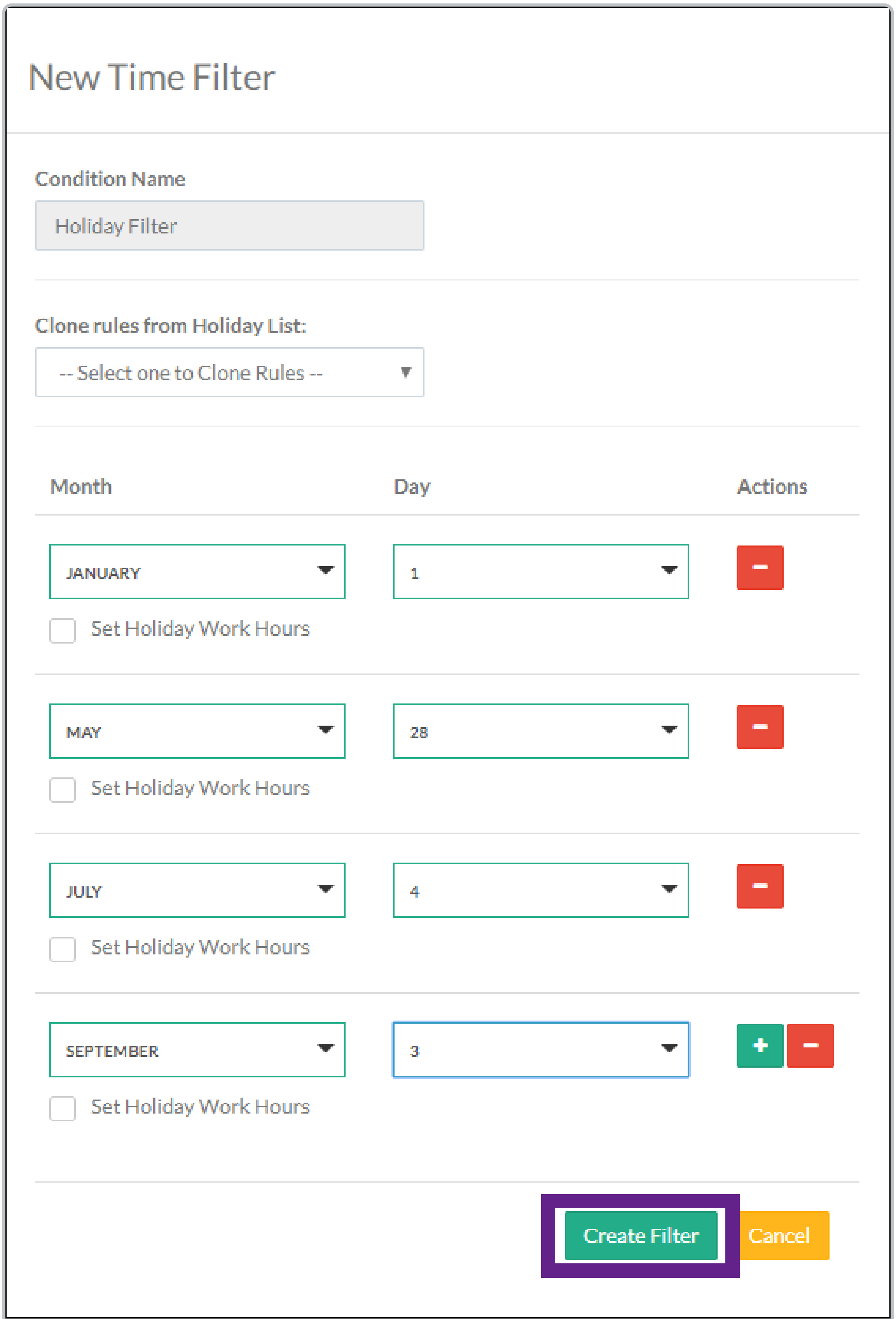


Figure 08: Create Filter Button

The holiday filter will be added to the call flow tree and appear with whichever dragged destination was assigned as in Figure 09 below.

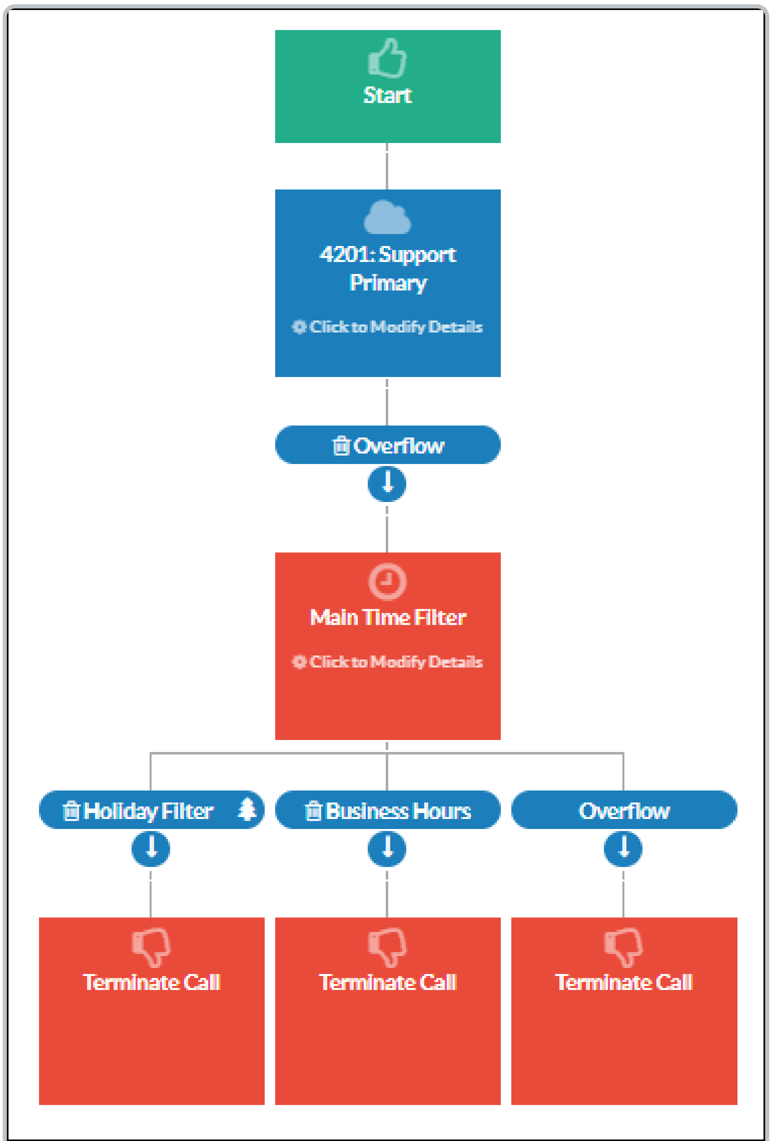


Figure 09: Filter Added to Call Flow

To add the Holiday List Filter to other call flows, select the object from the Time Filters list at the right of the screen then click and drag it where you want it in the call flow (refer to Figure 10 below).

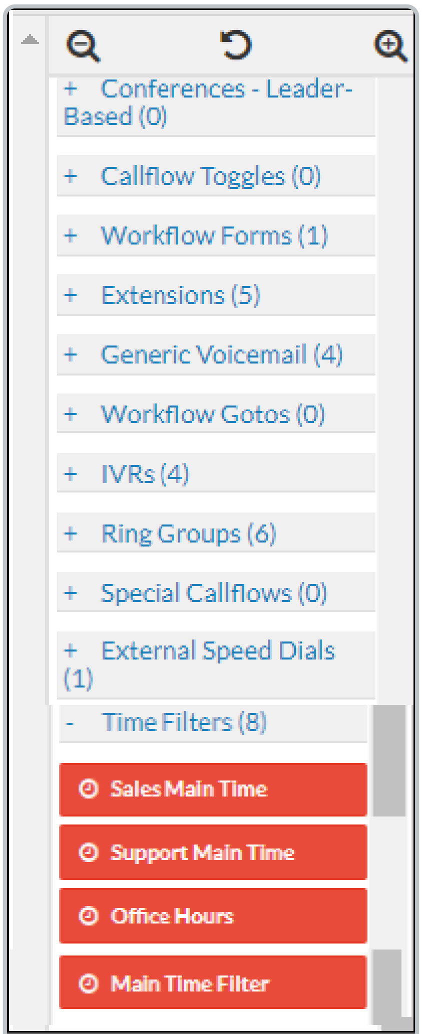


Figure 10: Time Filters List

Parking Lots

Last Modified on 11/22/2019 4:54 pm EST

Overview

There are two types of parking lots used to manage calls routed to destinations including specific users or a Call Ring Group Ring or to page all users:

- General Parking
- Valet Parking

General Parking works on a first in/first out basis and assigns calls to the first available extension in the lot. When a call is moved to the General Parking Lot, the user moving the call enters the main Parking Lot extension and waits for an audio response indicating which extension has received the parked call. General Parking Lots are used for physical phones and through Presence.

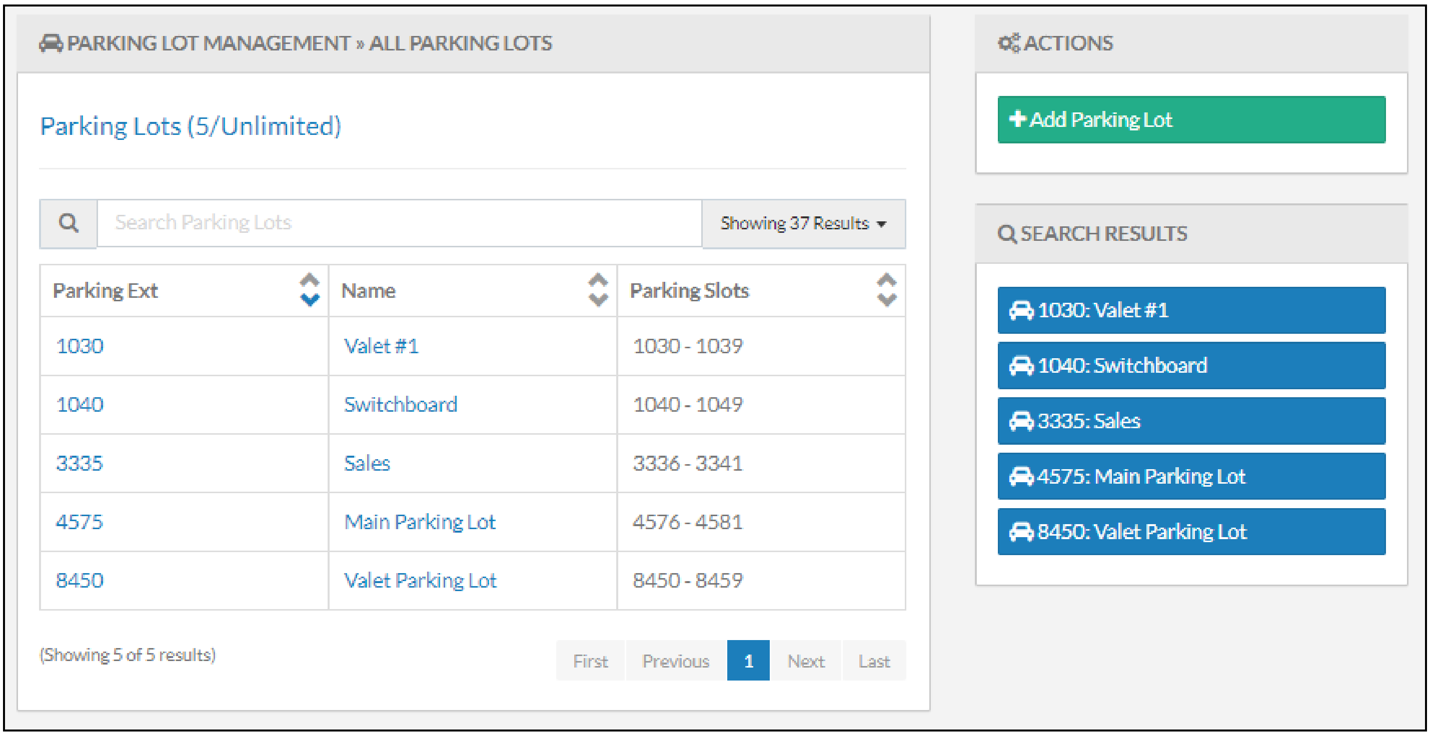
Valet Parking is ideal for specifying a specific Parking Lot extension when transferring a call. The advantage here is knowing the exact extension holding the parked call. However, if the selected extension is busy, the call will route back to the original destination for rerouting. Valet Parking can be useful from Bolt or a physical phone when utilizing Busy Lamp Field (BLF) keys.

A Kerauno Admin uses the **Interaction Routing > Call Parking Lots** menu to create and manage Call Parking Lots.

Parking Lots appear on the main screen and can be sorted by Parking Ext name, Name, and Parking Slots column headers. Click the respective Parking Lot Ext or Name hyperlink to view more details. An unlimited amount of Parking Lots can be created to fit the needs of an organization, but each Parking Lot is limited to 10 slots.

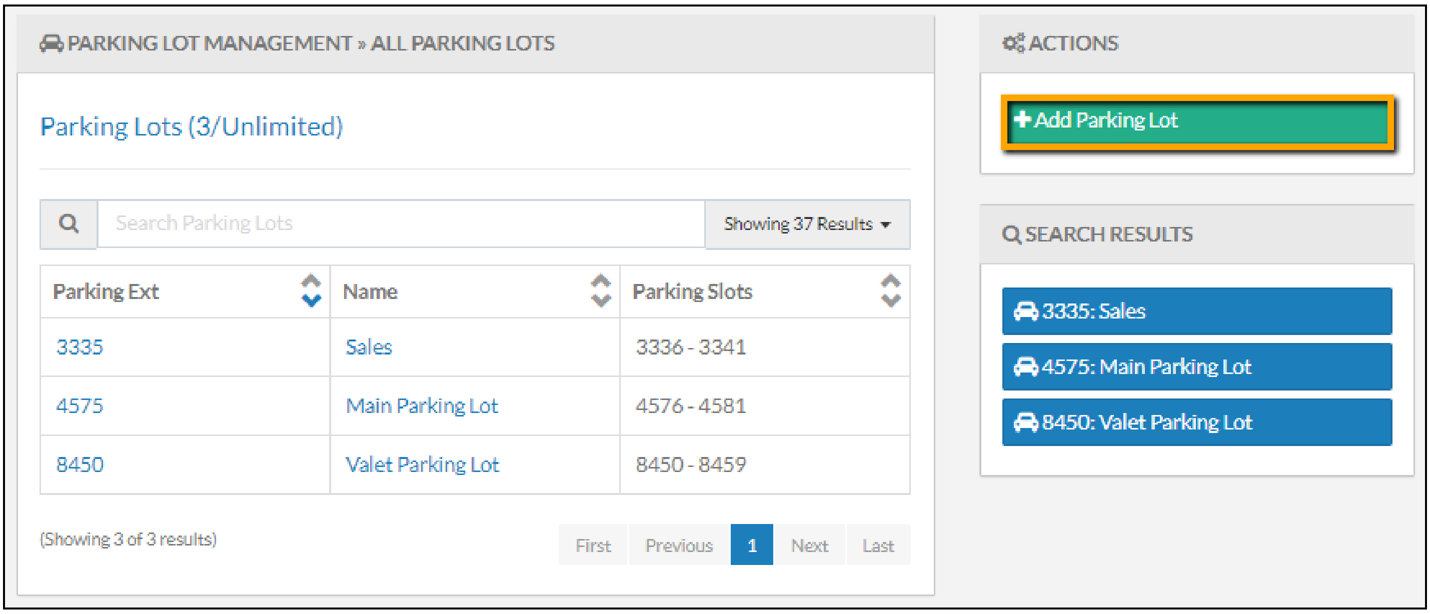
The **ACTIONS** section on the right side of the screen contains an **Add Parking Lot** link.

The **SEARCH RESULTS** section on the right side of the screen contains frequent Parking Lot search results.



Add a Parking Lot

Click **+ Add Parking Lot** under ACTIONS to create a new Parking Lot.



Parking Lot Information

Populate the following fields to establish Parking Lot details on the Parking Lot Information tab:

Parking Lot Name

Assign a name to the Ring Group that signifies the purpose of the group (e.g., Sales, Call Center, or Management Team). This field is required.

Parking Lot Extension

Enter a destination number ending in 0 to assign to the Ring Group for direct dial or to page all users. This field is required (e.g., 1600, 5000, and 8800).

Valet Parking

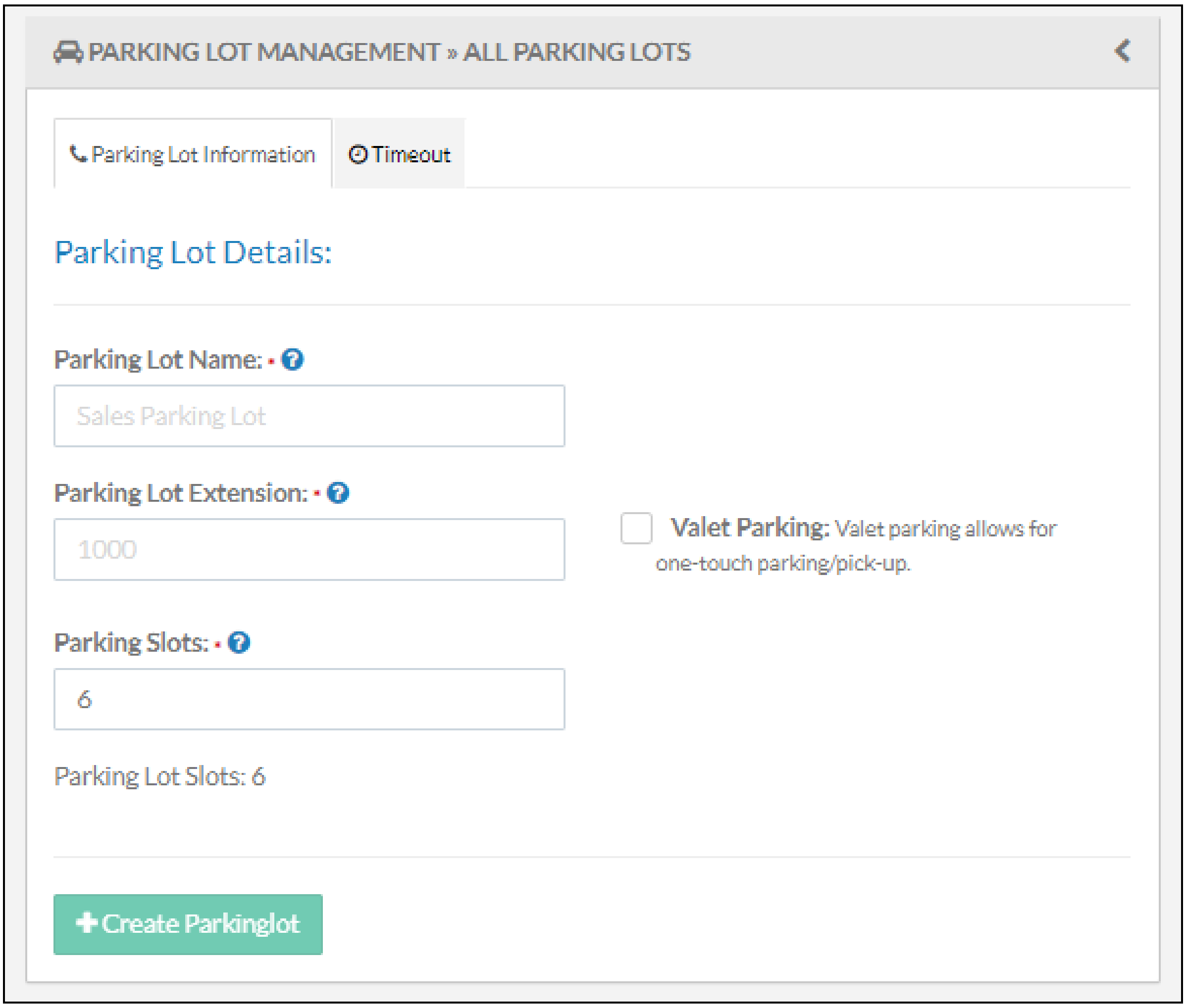
Enable to save the Parking Lot as a Valet lot, meaning that the user specifies the exact Parking Space to park the call.

Valet Parking Lot extension format: Select a starting Parking Lot extension ending in 0.

Note: When Valet Parking is selected, the number of Parking Slots is 10 and cannot be changed.

Parking Slots

Enter the number of assigned parking slots for this Parking Lot. The maximum number for this field is 10.



Timeout Settings

From this tab, establish timeout conditions on the Timeout tab:

- **Parking Timeout**

  Enter the amount of time in seconds that a call waits in the Parking Lot before routing back to the Time outflow destination.

- **Return to Origin**

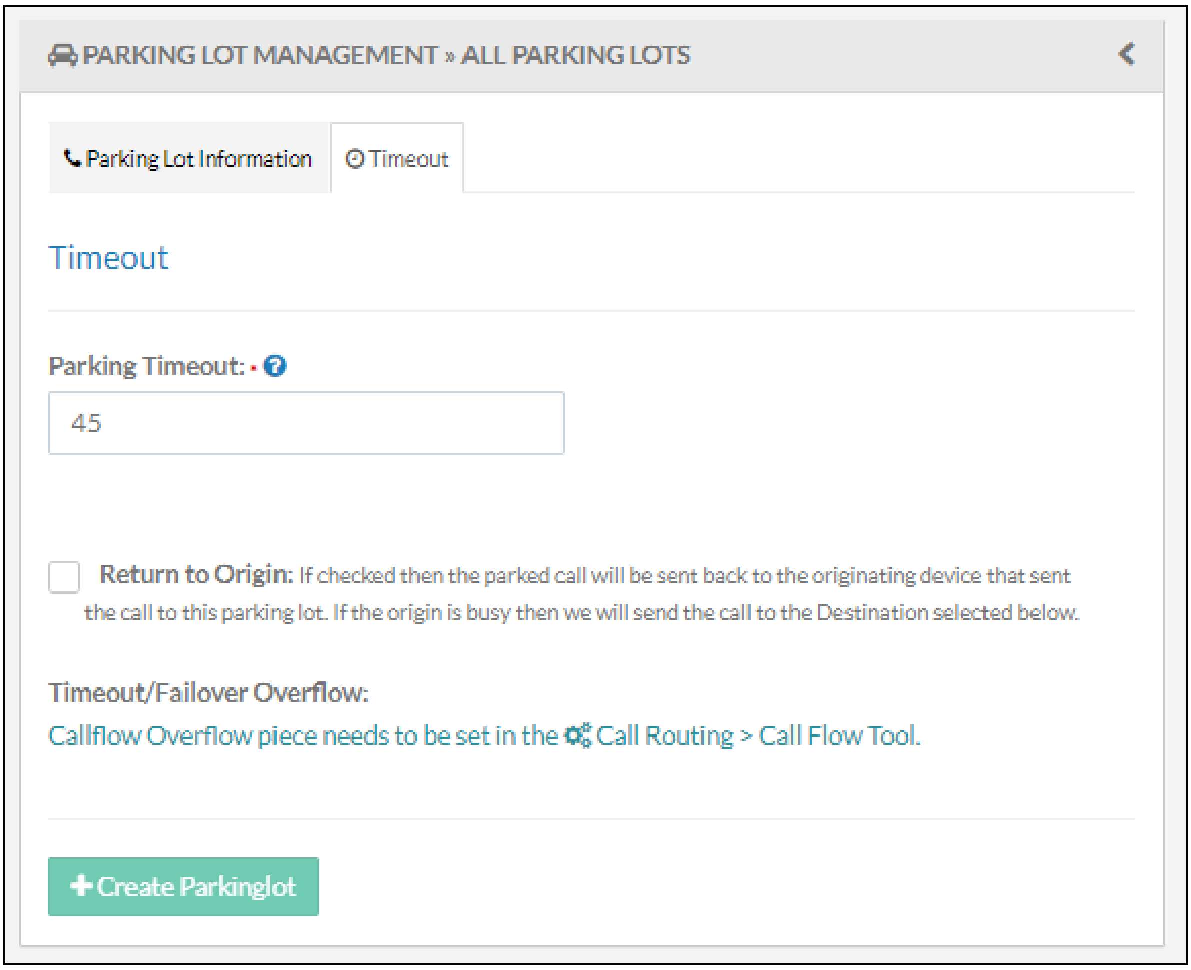
  Check this box to route a caller back to the originating device that sent the call once the Parking Timeout has expired. When checked and the originating device sending the call is busy, the call is routed to the destination identified in the Timeout/Failover Overflow below.

  When left unchecked, the call routes to the Timeout overflow destination. When a Timeout Overflow is not set, the call terminates.

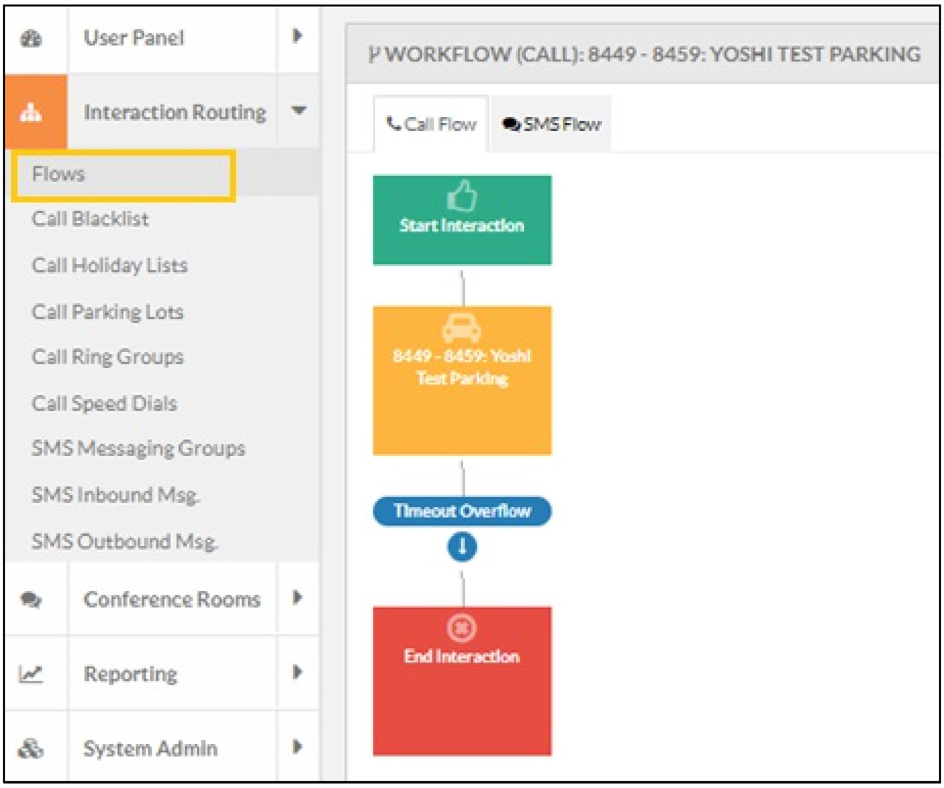
Timeout/Failover Overflow

When **Return to Origin** is marked, this section displays the overflow destination as determined in the Call Flow. When an overflow has not been established, the following message appears:

Callflow Overflow piece needs to be set in the Call Routing > Call Flow Tool.



A Kerauno Admin sets the Timeout/Failover Overflow from **Interaction Routing > Flows**.



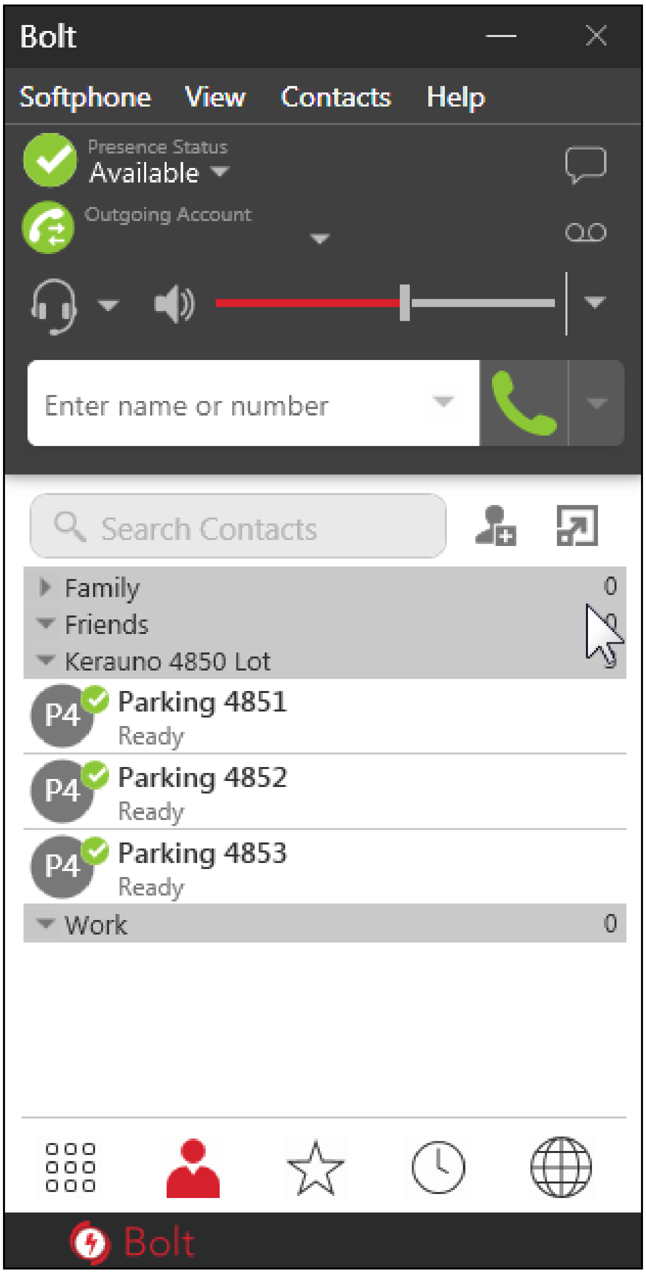
Programming Parking Lots

Physical phones and Kerauno's Bolt Softphone allow a user to program buttons for Parking Lots.

Create a Parking Lot record in Bolt

Store the primary Valet Parking Lot extension and the system selects the first available slot and announces audibly where the call is being parked.

Valet Parking Lot example in Bolt:


Bolt
Softphone
View
Contacts
Help
Presence Status
Available
Outgoing Account
Enter name or number
Search Contacts
Family
0
Friends
Kerauno 4850 Lot
P4
Parking 4851
Ready
P4
Parking 4852
Ready
P4
Parking 4853
Ready
Work
0
Bolt

Call Ring Groups

Last Modified on 09/26/2019 1:10 pm EDT

Call Ring Groups utilize a 3-5 digit extensions or also referred to as a destinations, to ring multiple end points. These identification numbers are used to route calls to Departments, Ring Groups, voicemail, or to a specific end user. Extensions can also be assigned to workflows.

An extension is comprised of 3, 4, or 5 digits total and range as follows:

Format	Available Extensions	Example
3 digits	100 – 899	Dial 140 for Sales
4 digits	1000 – 8999	Dial 1400 for Sales
5 digits	10,000 – 89,999	Dial 10400 for Sales

Note: Only one extension format can be used for each organization, which is assigned during implementation.

This 3-5 digit format is ideal for allowing organizations to maintain their current extension number structure when implementing a Kerauno system. The default setting of 4 digits allows for a wide variety of extensions. Larger organizations may consider utilizing the 5 digit format for limitless options.

A suggested best practice is to group extensions by Department or function within the organization.

Examples:

- All Sales extensions start with 1
- Technical Support extensions start with 2
- Executive extensions start with 4

A Kerauno Admin navigates to **Interaction Routing > Call Ring Groups** to create and manage Call Ring Groups.

Main Menu

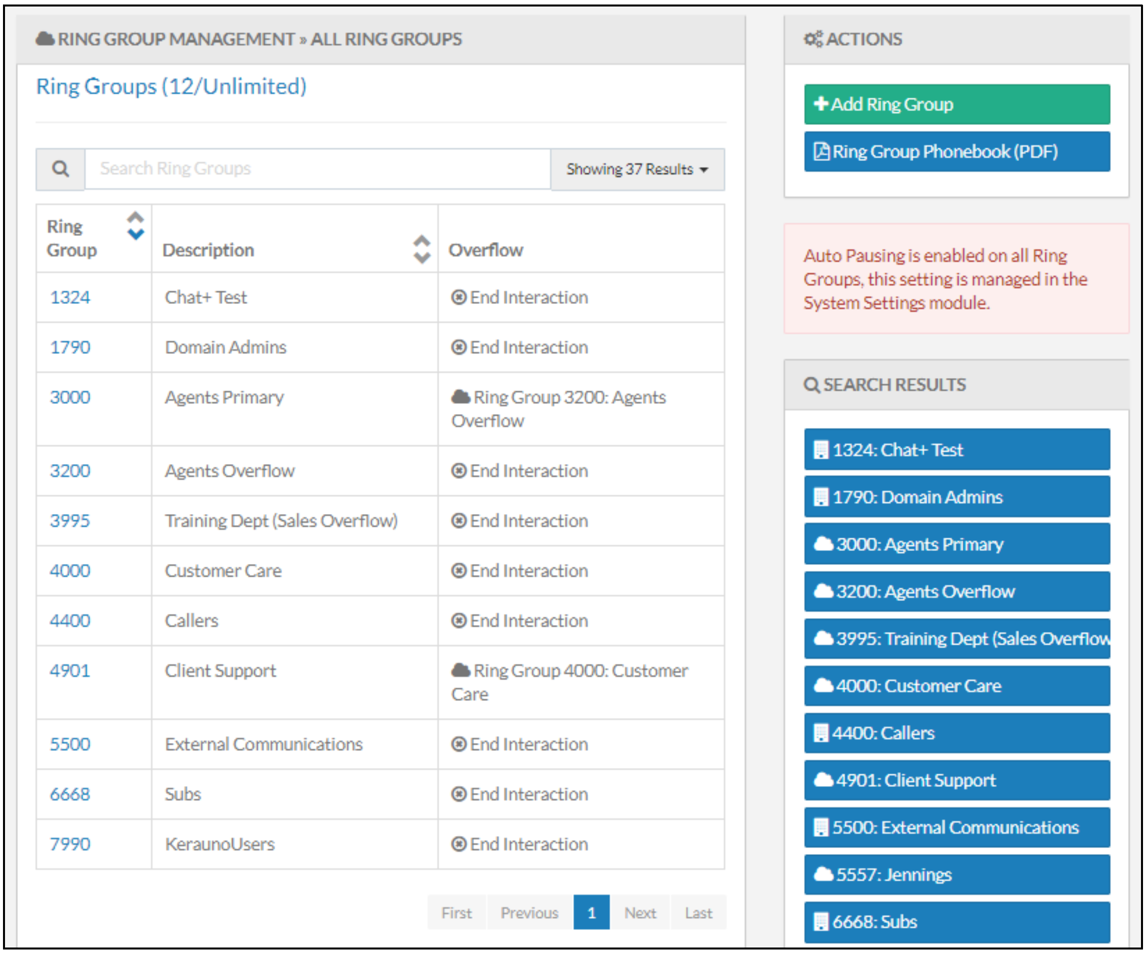
Ring Groups appear on the main screen and can be sorted by Ring Group name and

Description column headers. Click the respective Ring Group hyperlink to view more details.

The **ACTIONS** section on the right side of the screen contain links to **Add a Ring Group** and to download the **Ring Group Phonebook PDF** file.

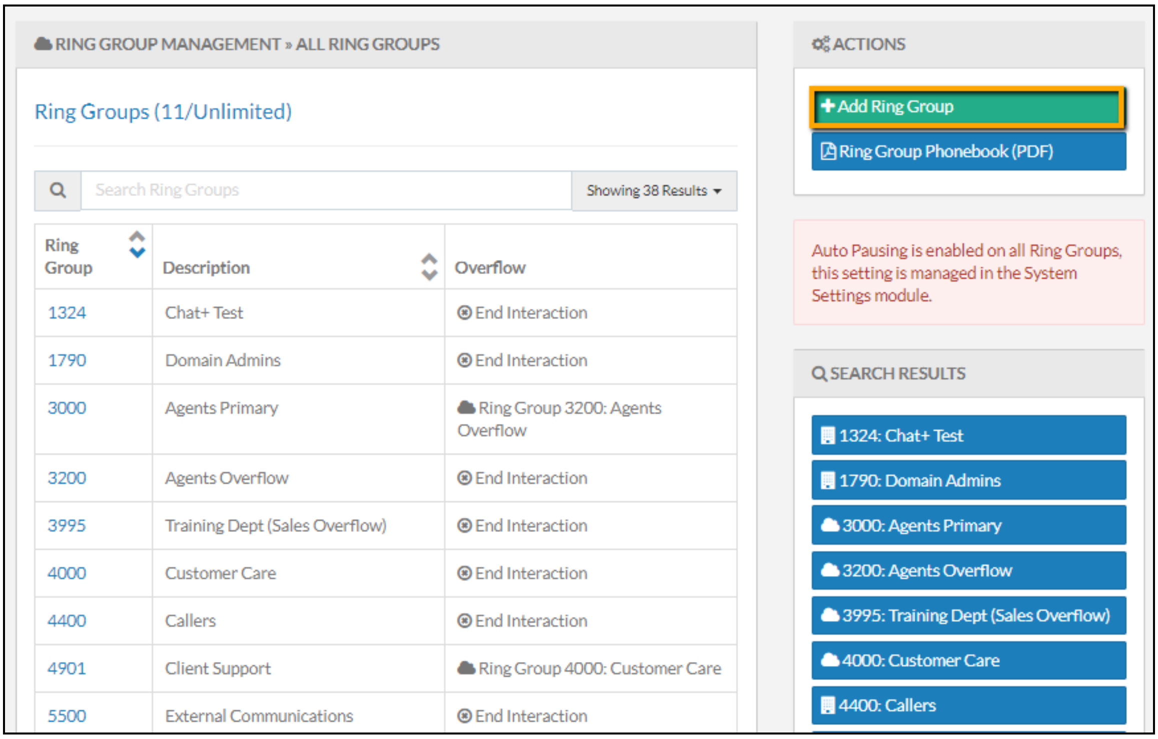
Important messages display under the **ACTIONS** section. For example, when Auto Pausing is active, a notification appears here.

The **SEARCH RESULTS** section on the right side of the screen contains frequent Ring Group search results.



Create a Ring Group

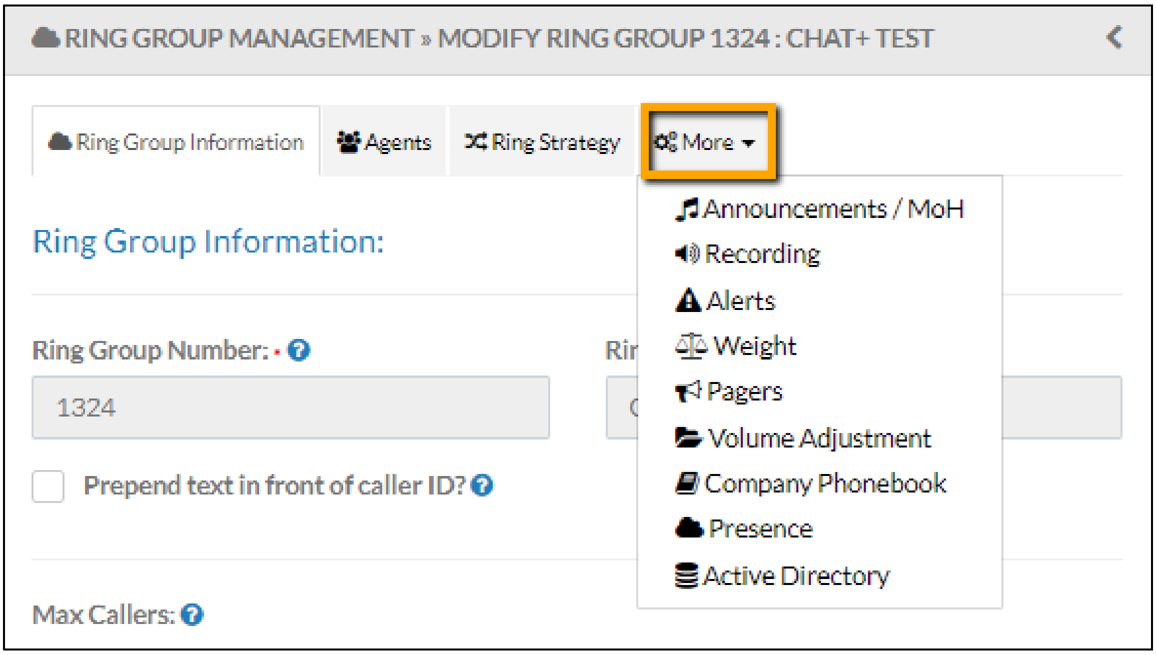
Click **+ Add Ring Group** under ACTIONS to create a new Ring Group.



A variety of tabs allow for Ring Group customization:

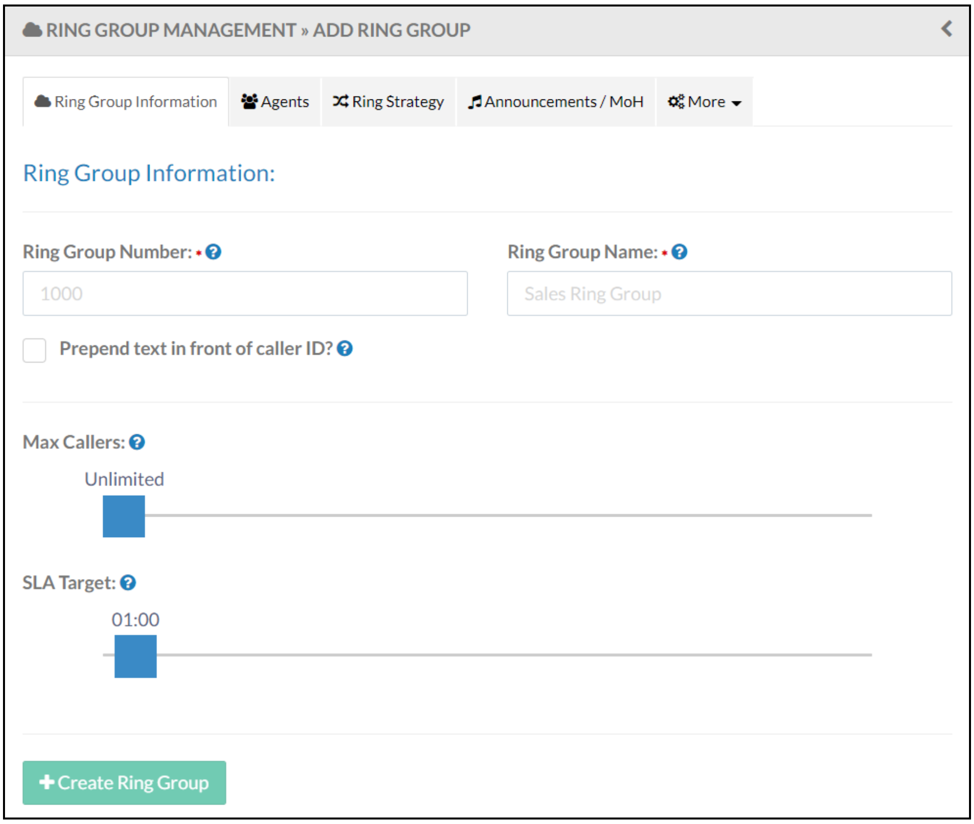
- Ring Group Information
- Agents
- Ring Strategy
- Announcements/MoH
- Recording
- Alerts
- Volume Adjustment
- Weight
- Pagers
- Company Phonebook
- Presence

Click the **More** drop-down icon to display all available Ring Group Setting tabs.



Ring Group Information

Note: It is imperative to save the Ring Group before navigating away from the Call Ring Groups menu. As each tab is populated, the Ring Group is not saved until the **Create Ring Group** button is clicked. The minimum required information to save a Ring Group includes a Ring Group Number and Ring Group Name.



Populate the following fields to establish basic Ring Group information on the Ring Group Information tab:

Ring Group Number

Enter a destination number to assign to the Ring Group for direct dial or to page all users.

Ring Group Name

Assign a name to the Ring Group that signifies the purpose of the group. Example: Sales, Call Center, or Management Team.

Prepend text in front of Caller ID

Click this checkbox to display identifiable information in front of the Caller ID number. This feature indicates to the agent the Ring Group from which the call originated. Note: This field is limited to 6 characters and should include a separator character such as a dash (–) or colon (:) which separates the custom text from the Caller ID number.

Once checked, click the radio button to display either the **Ring Group #** or **Custom Text**. When **Custom Text** is selected, enter the custom text in the field provided. Example: Customer Care Department can be shortened to CARE.

Example: CARE:4444

When **Ring Group #** is selected, the active Ring Group extension number displays. Example: Ring Group extension 2000 displays as 2000.

Max Callers

Move the slide bar to adjust the maximum number of callers in the queue. When a limit is set, calls exceeding the max number roll to an overflow destination. The default setting is unlimited. Some Kerauno users set a limit and then utilize an overflow to avoid long wait times.

SLA Target

Move the slide bar to adjust the Service Level Agreement (SLA) target. An SLA target of 1 minute indicates that calls should be answered within 1 minute. This feature is useful for reporting on Call Center metrics to evaluate call pickup times. The default setting is 1 minute.

Agents

Populate the Agents tab by adding Agents to a Ring Group and select Agent Handling settings.

Understanding Ring Group Types

There are two types of Ring Groups and each behave differently.

Static Ring Group

- Members are specifically assigned within a Static Ring Group. Login is required when Require Agent Login is enabled.

Dynamic Ring Group

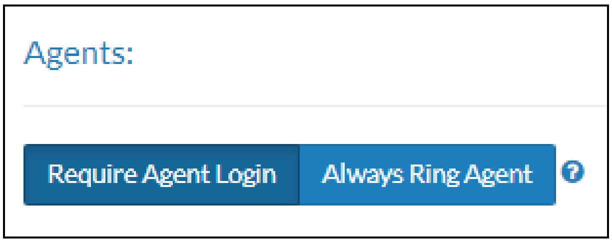
- Members are not specifically assigned in a Dynamic Ring Group and can log into one via Presence when needed. This is especially helpful for supervisors when aiding an agent with a call or during heavy call volume. Login is not required for a dynamic Ring Group.

A Ring Group can be both static and dynamic at the same time depending on the agents logged in. When an agent is listed as an extension in the drop-down configuration for the Ring Group, they are a Static Agent and therefore unable to logout of the Ring Group by the normal means.

A Dynamic agent is someone that logs into any Ring Group that they are not statically assigned.

There are two main login options on the Agents tab:

- Require Agent Login
- Always Ring Agent



Require Agent Login

Click this button to allow agents to log in/out of the Ring Group through Presence or by dialing *74 from a physical phone. When selected, additional settings display:

Select Extensions

Click **Select Extensions** to add agents to the Ring Group. Click the checkbox for each extension to assign to the Ring Group and click **OK**.

Ring Group Password

Enter a password to restrict access to the Ring Group by requiring a password.

Allow any agent to login

Click this checkbox to allow any agent to log into the Ring Group, regardless of if they are assigned to the Ring Group. This feature is ideal for management to assist when needed.

Always Ring Agent

Click this button to keep agents statically logged into the Ring Group indefinitely. This setting means that agents are not removeable from a Ring Group unless removed by an Admin. Agents always appear in the Ring Group and calls are routed to agents based on established time filters. This option eliminates the need to log in and out, however it limits report accuracy.

Note: The Pause feature does not override this setting.

Agents:

Select Extensions

Click **Select Extensions** to add agents to the Ring Group. Click the checkbox for each extension to assign to the Ring Group and click **OK**.

Agent Handling:

Show missed calls on Agent Handsets

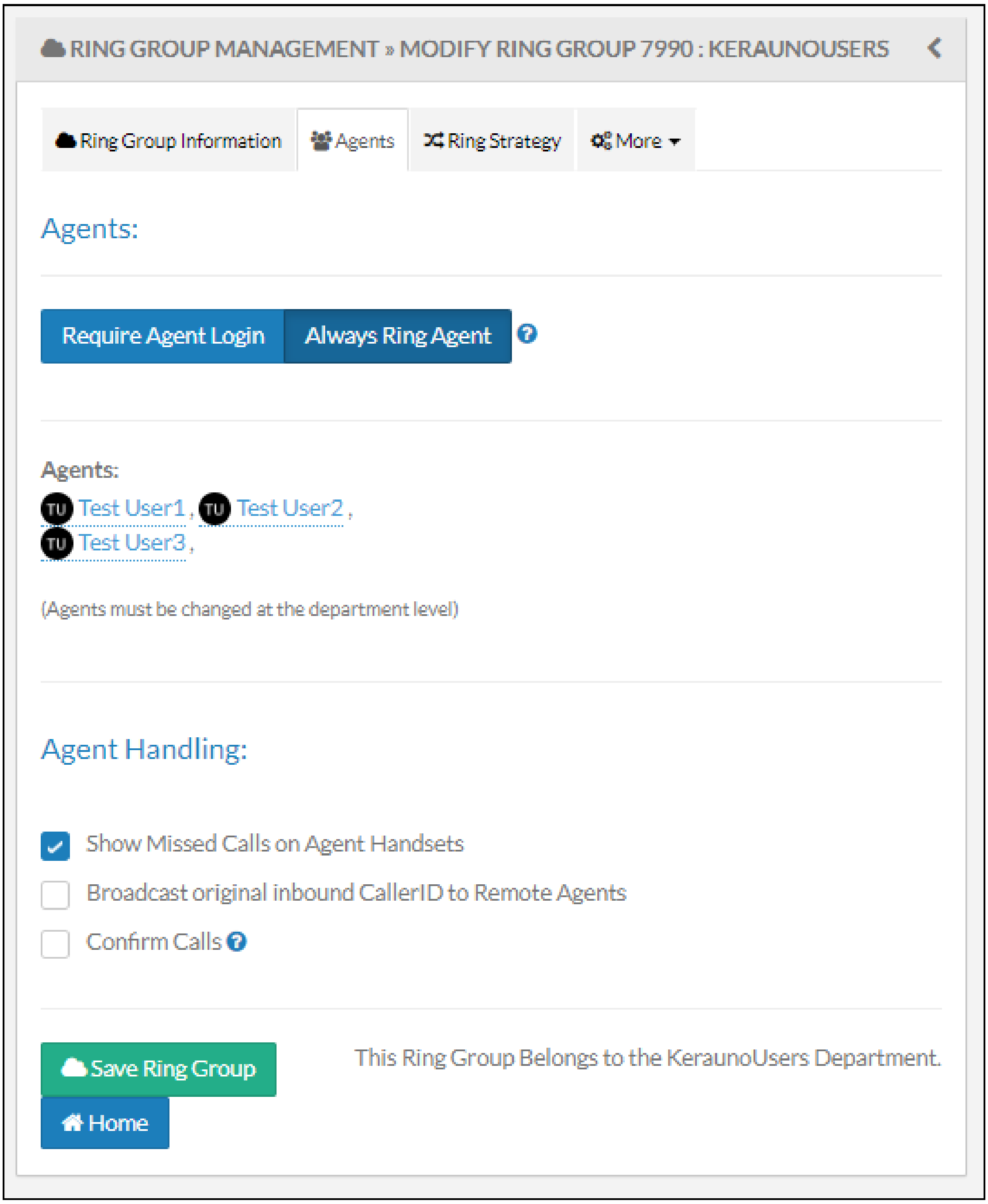
Click this checkbox to display missed calls to an agent on their handset.

Broadcast original inbound CallerID to Remote Agents

Click this checkbox to display the original inbound phone number of the call instead of the system Caller ID. This feature is helpful for remote agents or agents taking calls from an alternate number such as a cell phone.

Confirm Calls

Click this checkbox to confirm incoming Ring Group calls. An audio message plays to the agent similar to, 'Press 1 to accept a call from Customer Support.'



A variety of Ring Strategy settings determine the distribution of received calls to different agents in a Ring Group. Each setting is further explained below.

- Ring Strategy
- Busy Agent Handling

- Find Me
- Distinctive Ring
- Join When Empty
- Auto Pause
- Maximum Ring Group Hold Times
    - Agent Ring Time
    - Wrap-Up Time
    - Ring Group Retry

Ring Strategy

A Strategy establishes the distribution of received calls to agents. Select a Ring Strategy for the Ring Group on the Ring Strategy tab. Strategies include:

- **Ring All**-Rings all active agents in the queue at once for the first available agent to accept the call.
- **Least Recent**-Rings the agent with the longest time since their last completed call in the queue.

    Note: This option causes the caller to be the target of one single agent. If the agent rejects the call, the call continues to target the same agent, in which case the call remains on hold until the Ring Group Retry time expires. Upon expiration, the call will ring to the same agent again, unless the agent changes their status by pausing or logging out.

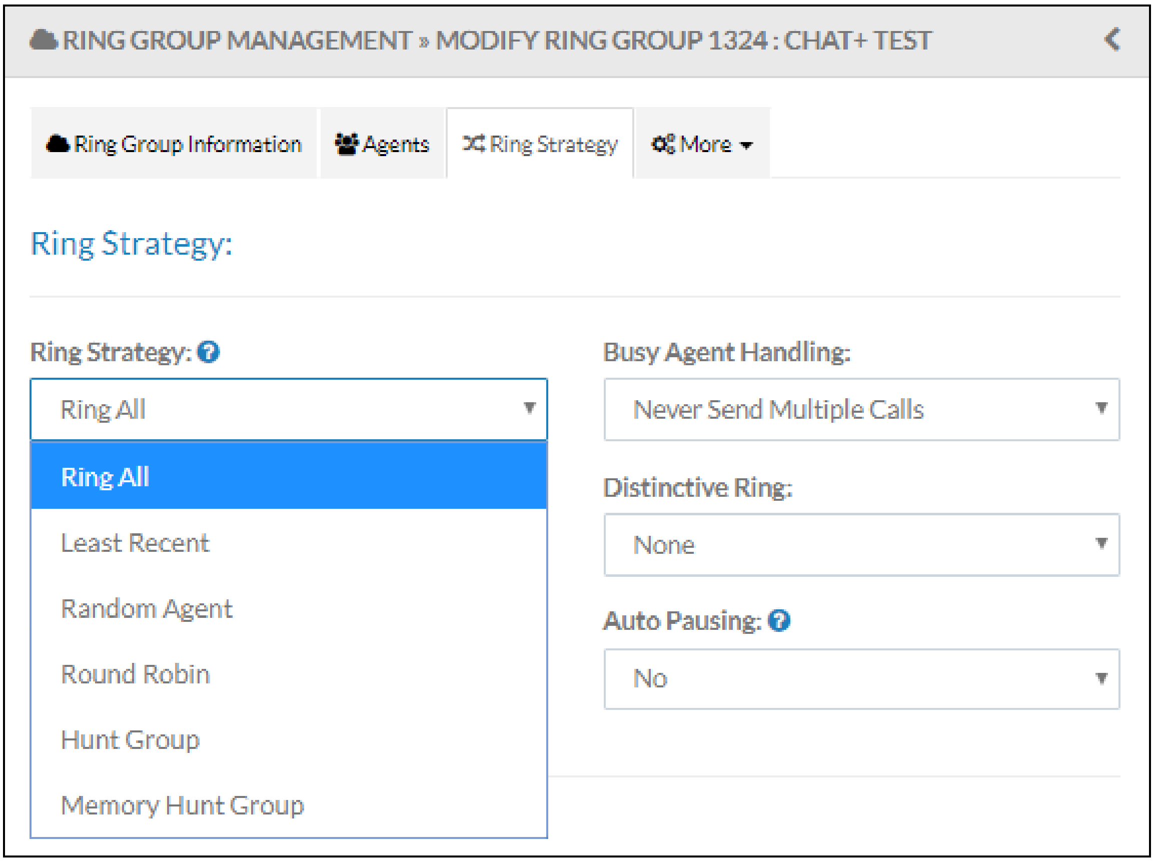
    Example: The default Wrap-Up time of 30 seconds may not be enough to record notes from the last call. Therefore, the agent rejects the call, putting it on hold for the Ring Group Retry time frame. The call will re-ring the same agent after the Ring Group Retry time frame until answered. While this specific call is queued for this particular agent, other calls in the queue can be answered by other agents before this one.

    Due to the situation above, AutoPause is recommended with this Ring Strategy to allow the call to roll to another agent.

- **Random Agent-**Rings a single available agent at random.
- **Round Robin**-Rings agents one by one in rotation in order of when they logged

in, remembering agent routing from the last incoming call.

- **Hunt Group**-Select this strategy to place individual agents into a Ring Group to answer calls in a specific order. Once this strategy is selected, add agents to the Ring Group from the Agents tab and arrange them in preferential order to receive calls. To further control agent answering priority within a Ring Group, click here to learn about utilizing Ring Weights and Penalties.
- **Memory Hunt Group**- Select this strategy to place individual agents into a Ring Group to answer calls in a specific order with stacking agent engagement. Once this strategy is selected, add agents to the Ring Group from the Agents tab and arrange them in preferential order to receive calls. When an agent doesn't answer a call, a second agent is added to the list and both agents are rung simultaneously. Additional agents are engaged until the call is answered. To further control agent answering priority within a Ring Group, click here to learn about utilizing Ring Weights and Penalties.



Busy Agent Handling

This setting determines steps when all agents are on other calls. The following settings are available:

- **Always Send Multiple Calls** – Multiple calls are routed based on the Ring Strategy even when agents are currently on a non-Ring Group call.
- **Never Send Multiple Calls** – Holds incoming calls when agents are currently on a call. This is the default setting and a best practice recommendation.
- **Ignore if on Existing Queue Call** – Call is ignored when an agent is a on a queue call in a separate Ring Group.
- **Yes – Monitor Remote Agents** – Recognizes a user’s status even when logged in via a 10 digit number instead of an extension on the system.

Find Me

When enabled, Find Me routes calls to an agent’s cell phone or alternate number (including another Ring Group) even when away from their work space. When Find Me is disabled, and the agent is Paused and calls ring to other available agents or an overflow.

Join When Empty

Use this setting to address empty Ring Groups.

When set to NO, incoming calls to an Empty Ring Group will immediately route to an overflow destination.

When set to YES, calls will sit on hold in the specified Ring Group for the max hold time selected for the Ring Group.

Auto Pausing

This feature pauses calls in **all** Ring Groups when an agent misses or rejects a call.

Auto Pause is managed by an Admin from **System Settings > Advanced Settings > Ring Groups**.

Maximum Hold Time in this Ring Group

Move the slide bar to adjust the maximum time a caller is left on hold. With large call volumes, longer Max hold times may be needed until an agent becomes available. The lower the time, the faster a call rolls to an overflow destination.

Agent Ring Time

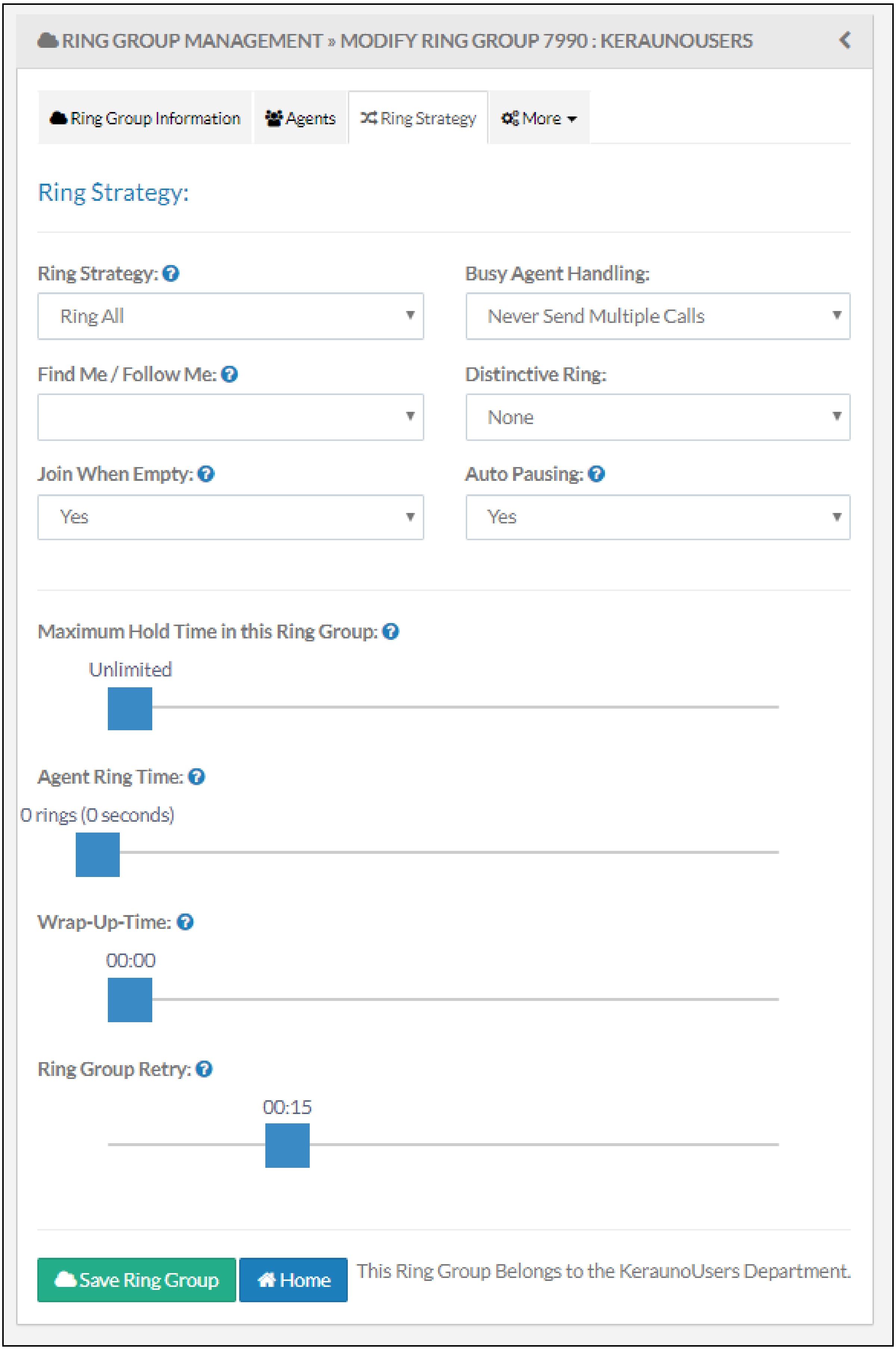
Move the slide bar to adjust the number of rings before going on hold for the Ring Group Retry time frame. Most phone calls are answered within 5 rings (15 seconds).

Wrap-Up-Time

Move the slide bar to adjust the number of seconds allotted at the end of each call for the agent to record notes before taking another call. During this timeframe, calls are withheld from the agent.

Ring Group Retry

Move the slide bar to adjust the number of seconds a call is held on hold before ringing an agent again. The default setting is 15 seconds. Organizations with higher call volumes should incorporate a shorter retry setting to aid in efficiency and SLA goals.


RING GROUP MANAGEMENT » MODIFY RING GROUP 7990 : KERAUNOUSERS
Ring Group Information
Agents
Ring Strategy
More
Ring Strategy:
Ring Strategy:
Ring All
Busy Agent Handling:
Never Send Multiple Calls
Find Me / Follow Me:
Distinctive Ring:
None
Join When Empty:
Yes
Auto Pausing:
Yes
Maximum Hold Time in this Ring Group:
Unlimited
Agent Ring Time:
0 rings (0 seconds)
Wrap-Up-Time:
00:00
Ring Group Retry:
00:15
Save Ring Group
Home
This Ring Group Belongs to the KeraunoUsers Department.

Announcements / MoH

From this tab, establish Music on Hold and Caller Position/Hold Time Announcement settings. Each setting is explained further below.

Music on Hold Class

Select a playlist from the drop-down menu for music to play while a caller is on hold in the Ring Group. To create and use a new Playlist, navigate to System Admin > Music on Hold.

Join Announcement

Select an announcement from the drop-down menu for an audible message to play to a caller when they are placed in the Ring Group. To create and use a new announcement, navigate to **System Admin > System Recordings**.

Agent Announcement:

Recording

Select an announcement from the drop-down menu for an audible message to play to an agent when they accept a call. This feature is helpful when agents are managing calls for a variety of clients and helps clarify the nature of the call before engaging with the caller. To create and use a new announcement, navigate to System Admin > System Recordings.

Next, toggle the appropriate radio button for the announcement frequency:

- **Always** – Play the announcement for each accepted call.
- **When No Free Agents** – Play the announcement only when there are no free agents in the Ring Group. Free means that an agent meets all of the following criteria:
  - Logged into the Ring Group
    - Not Paused
    - Not on a Call
    - Current in the Wrap Up session after a call
- **When No Ready Agents** – Play the announcement only when there are no ready agents in the Ring Group. Ready means that an agent meets all of the

following criteria:

- Logged into the Ring Group
    - Not Paused
    - Not on a Call
    - Not in the Wrap Up session after a call

Caller Position/Hold Time Announcements:

Frequency

Move the slide bar to adjust the announcement frequency (minute and seconds) notifying the call of their position in the hold queue.

Announce Position

Select Yes from the drop-down menu to announce the caller's position in the hold queue. Select No for no queue position announcement.

Announce Hold Time

Select the appropriate setting from the available drop-down menu:

Yes – Announce the expected wait time in the hold queue.

No – No announcement for expected wait time.

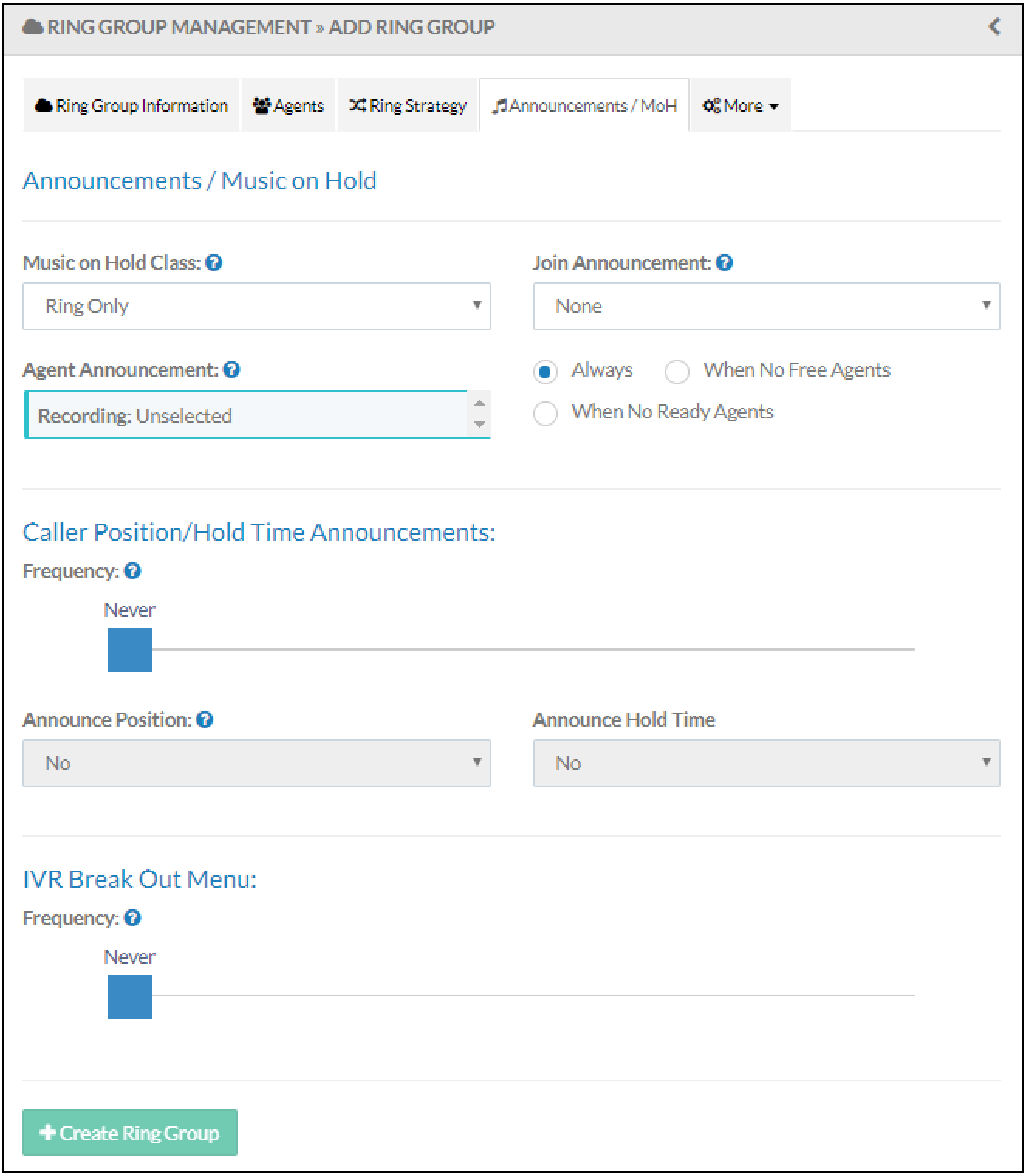
Once – Announce the expected wait time a single time only.

IVR Break Out Menu:

Frequency

Move the slide bar to adjust the frequency (minute and seconds) of the announcement on the Breakout IVR menu played to the call of their position in the hold queue.

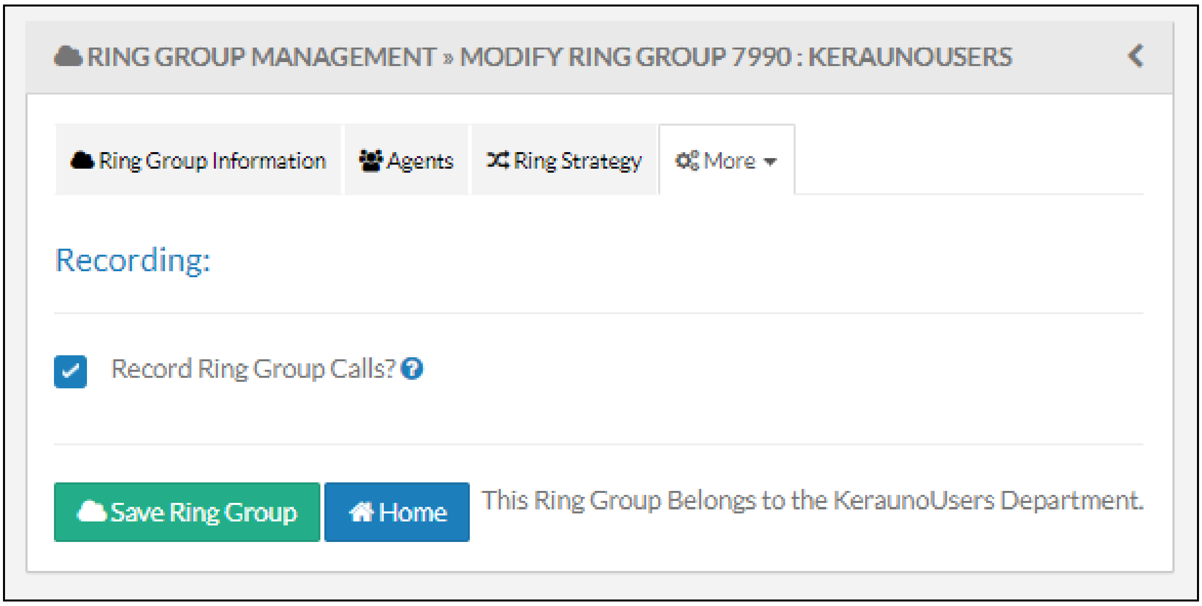
Note: An IVR must be present in the associated Call Flow in order to execute.



Recording

From this tab, enable Ring Group call recordings. Click the Record Ring Group Calls checkbox to record all calls.

Note: Policy Override is required within Presence to toggle recording off as needed to ensure compliance regulations.



Alerts

From this tab, establish alerts to notify agents when the number of callers or hold time reaches a determined threshold in the Ring Group.

To generate interval based reports including all Ring Group activity navigate to **Administration > System Settings > Email & Alerting > Ring Group Alerts**

Click the **Only Send Alerts to Logged in Agents** checkbox to ensure only active agents are notified of queue activity.

Alert When Callers in Queue is Above
Move the slide bar to set the maximum number of callers in the queue before activating Agent Alerts. Example: When set to 10 callers, selected agents receive a notification that there are 10 or more callers in the queue.

Alert When Caller is on Hold for More than X Seconds

Move the slide bar to set the number of seconds a caller is on hold in a queue before activating Agent Alerts. Example: When set to 300 seconds (5 minutes), selected agents receive a notification that a caller has waited 300 or more seconds in the hold queue.

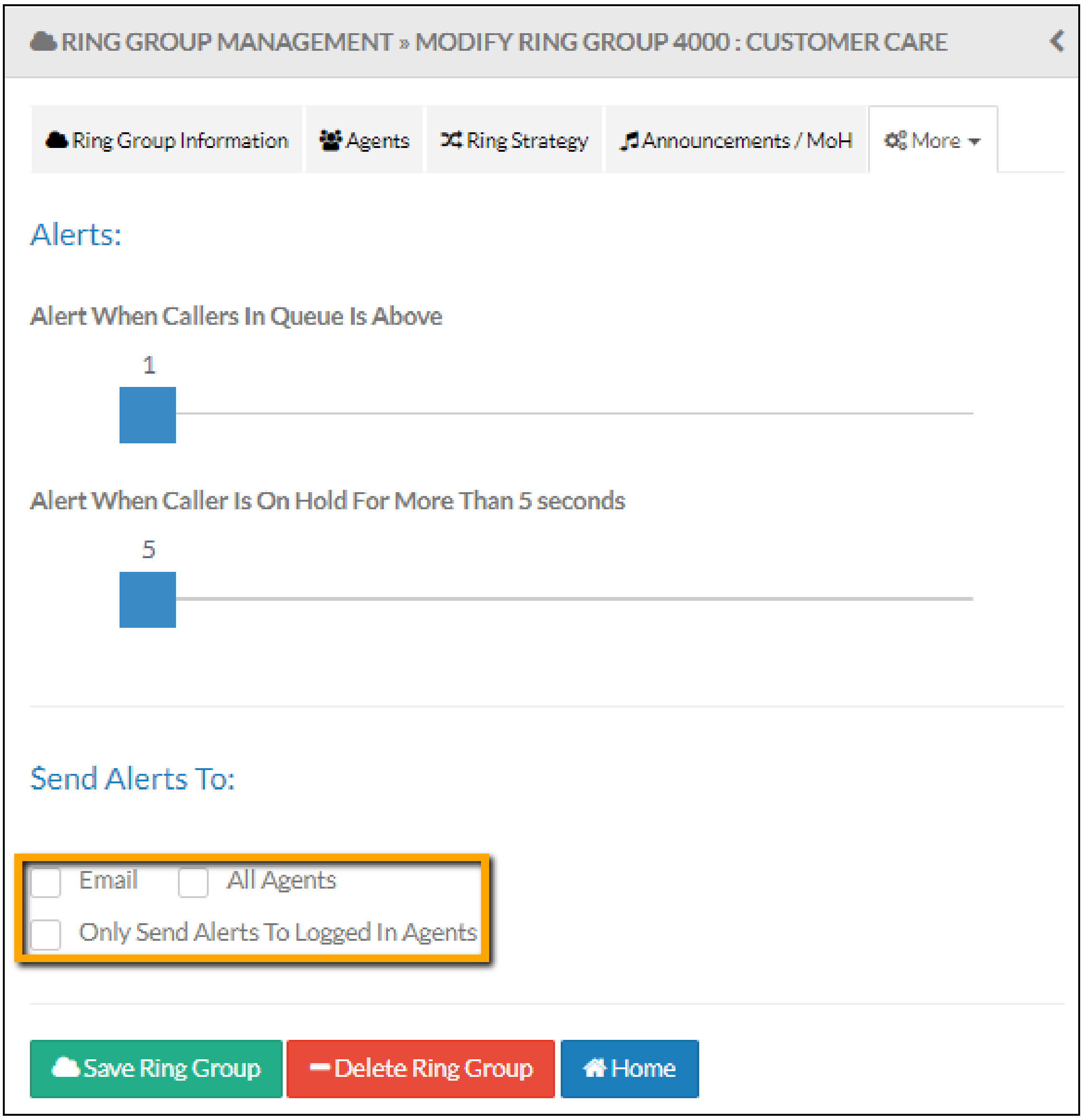
Sent Alerts To

Ring Group alerts are sent via email. Use this setting to determine alert recipients:

Email – When selected, click the checkbox for desired agents from the drop-down menu and click **OK**.

All Agents – When selected, all agents in the specific Ring Group receive Ring Group Alerts.

Only Send Alerts to Logged in Agents – When selected, only agents that are logged in receive an alert.



Volume Adjustment

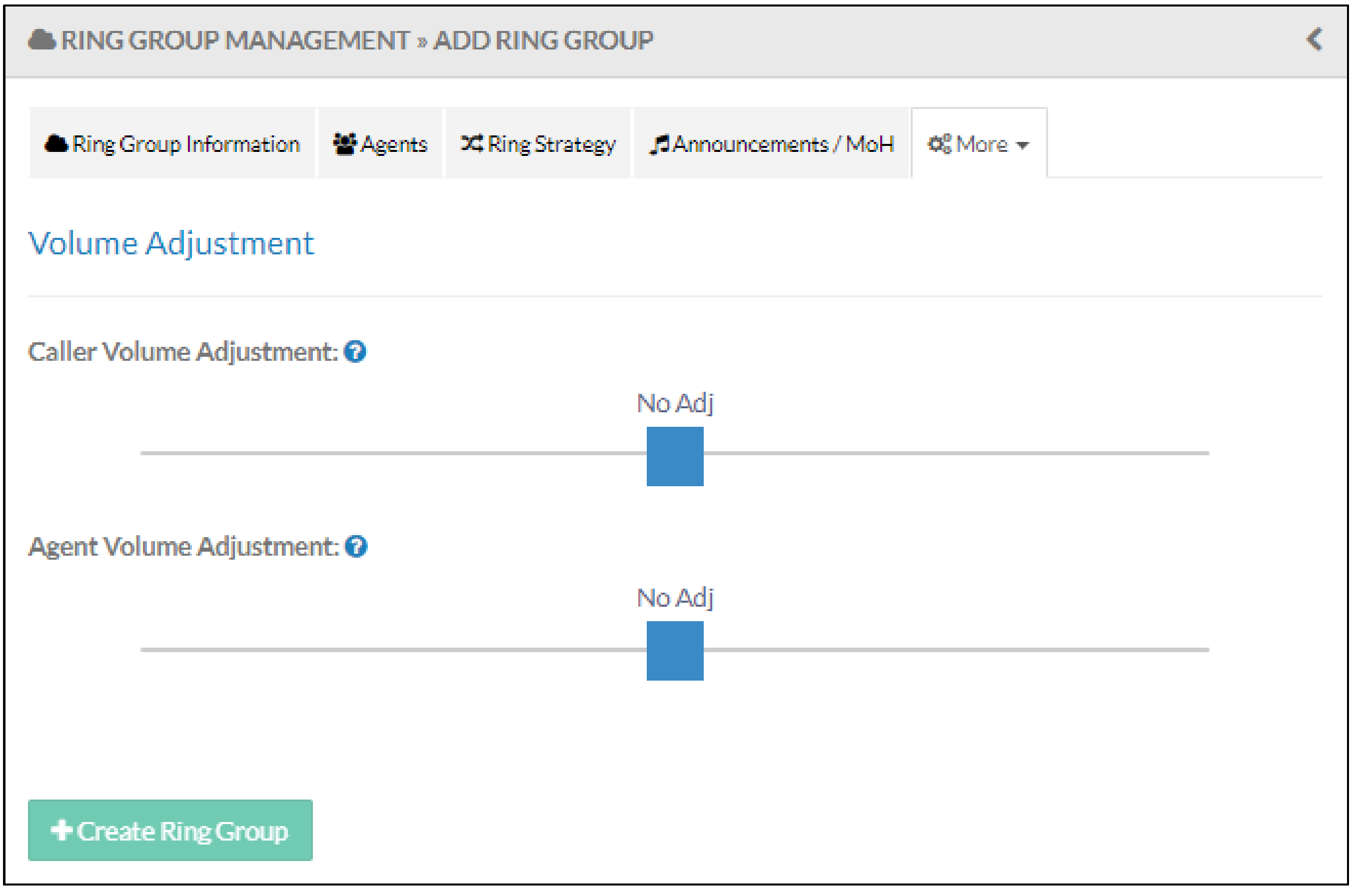
From this tab, establish Caller and Agent volume settings for the Ring Group.

Caller Volume Adjustment

Move the slide bar to adjust the volume of the caller to the agent. Move the slide bar to the left to decrease the volume. Move the slide bar to the right to increase the volume to help the agent better hear the caller.

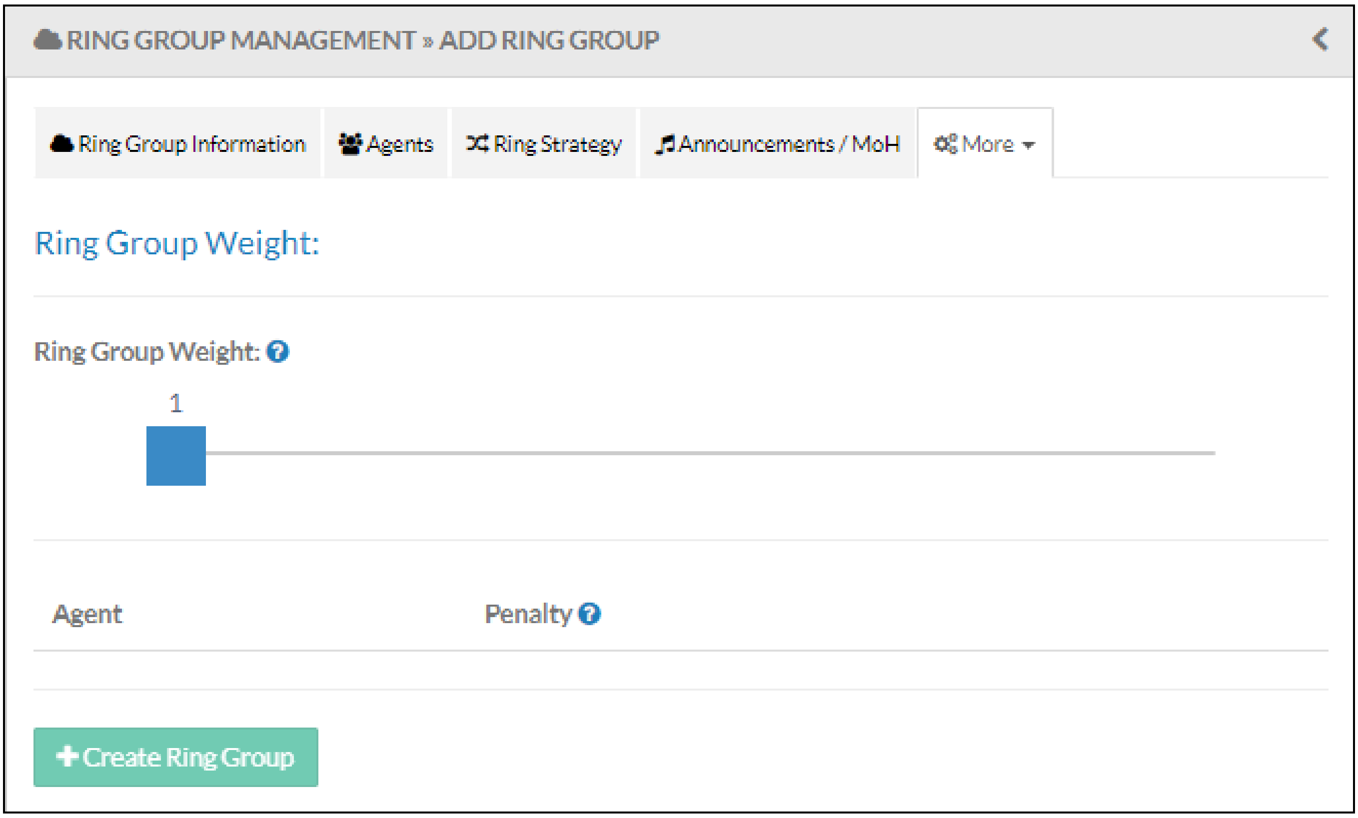
Agent Volume Adjustment

Move the slide bar to adjust the volume of the agent to the caller. Move the slide bar to the left to decrease the volume. Move the slide bar to the right to increase the volume to help the caller better hear the agent.



Weight

From this tab, establish Ring Weights and Penalties. Click [here] for an in-depth article on this topic.

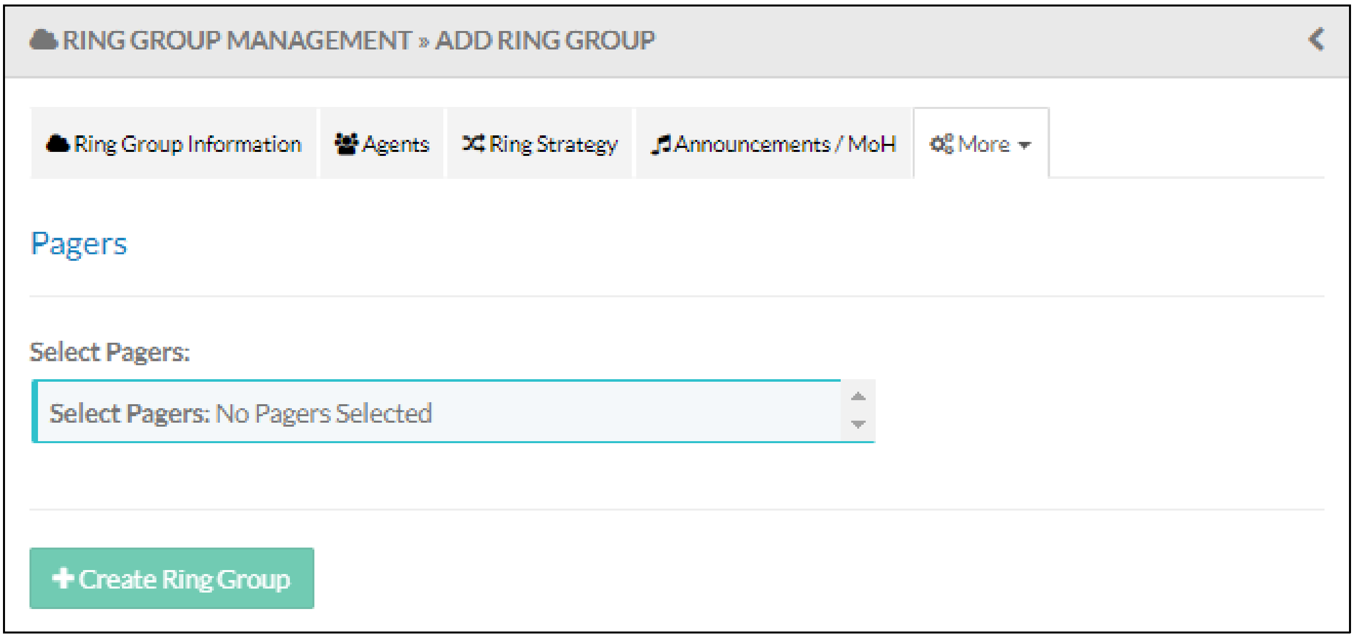


Pagers

From this tab, select **Paging Zones** to page individual phones or audibly announce on an office PA system.

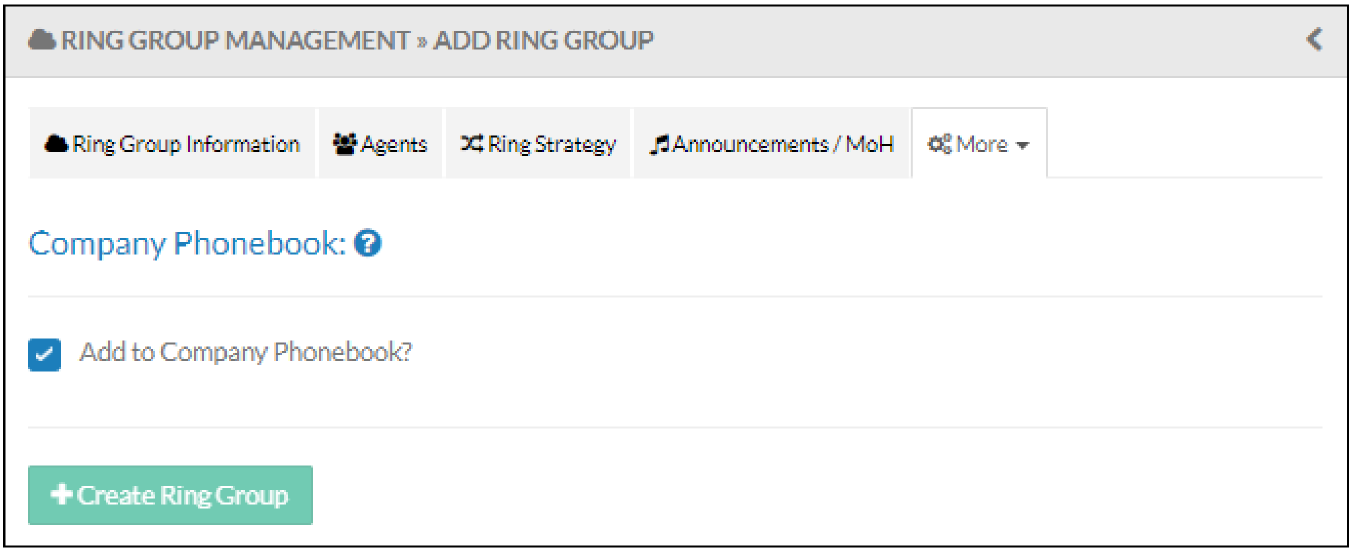
This feature is helpful when important calls must be answered as agents can be notified quickly. To create and use a new Paging Zone, navigate to **Users & Devices > Paging Zones**.

When selected, click the checkbox for paging zones to associate with the Ring Group and click **OK**.



Company Phonebook

From this tab, click the **Add to Company Phonebook** checkbox to display the Ring Group in the Company Phonebook.



Presence

From this tab, manage Presence settings.

Click the **Configure for Presence?** checkbox to display the Ring Group in the Presence Ring Groups Widget. This option utilized a Presence Queue license and is useful for reporting.

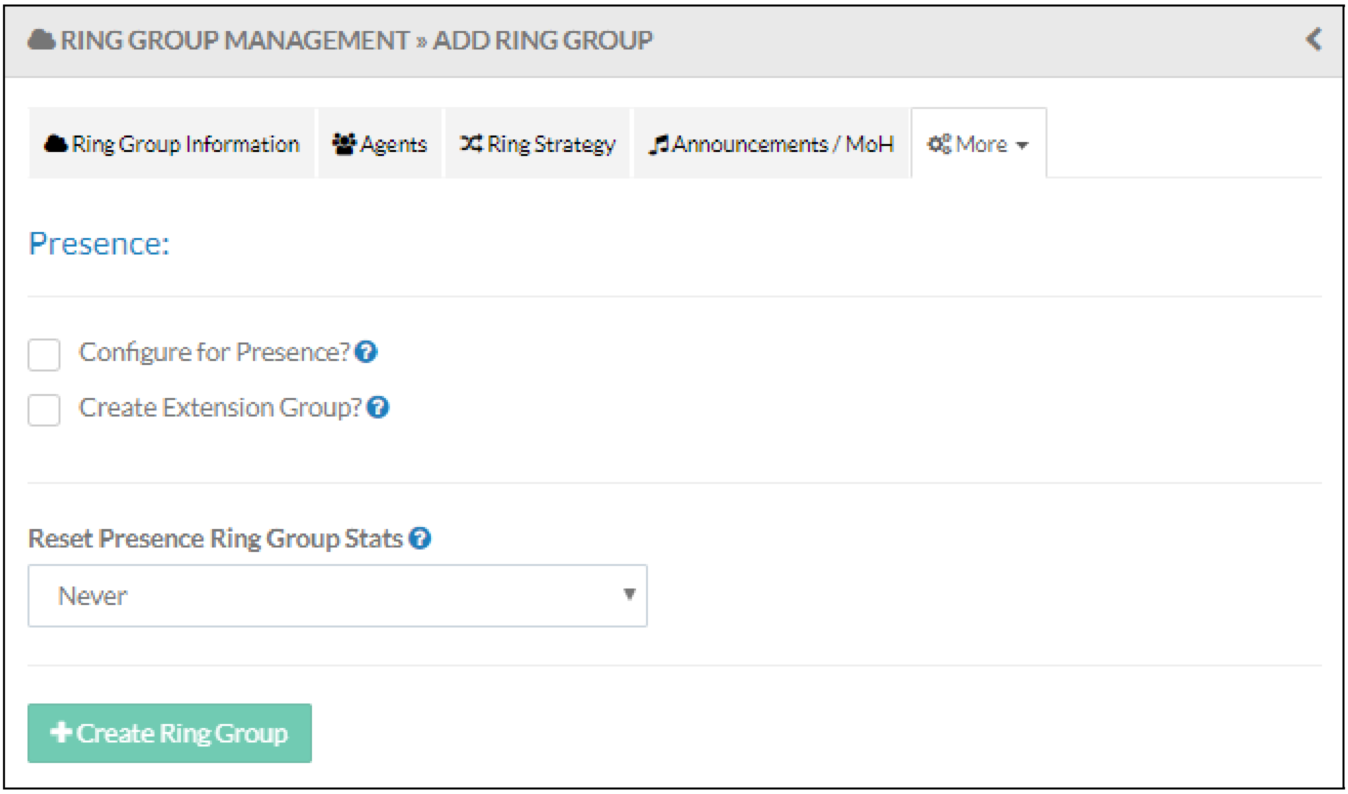
Click the **Create Extension Group?** checkbox to create a filter for Presence that allows agents to select the Ring Group and only agents in this Ring Group from their Presence experience. This feature is very helpful when transferring calls to other agents.

Reset Presence Ring Group Stats

Select a frequency from the drop-down menu to reset the Presence Ring Group statistics. Options include:

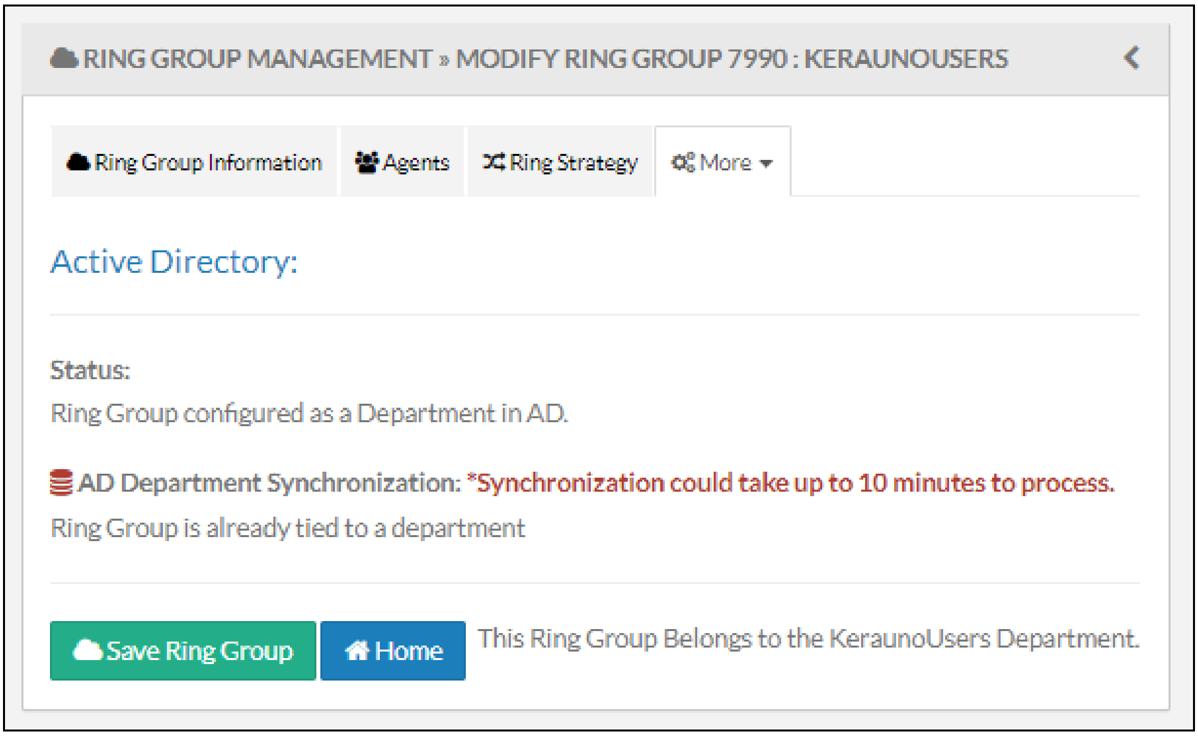
- Never – Statistics are never reset.
- Hourly – Run once an hour at the beginning of the hour.
- Daily – Run once daily at midnight.
- Weekly – Run once a week; midnight on Sundays.
- Monthly – Rung once a month; midnight on the first of each month.
- Annually – Run once a year; midnight on January 1 st.

Note: Statistics are not reset until the selected frequency time frame has expired and new data has been recorded. Example: When set to Daily, yesterday's statistics still show active until new data is recorded the next day after the reset time has been triggered.



Active Directory

From this tab, view Active Directory settings. Click [here] to learn more about Active Directory settings and configuration.



Manage Call Ring Groups

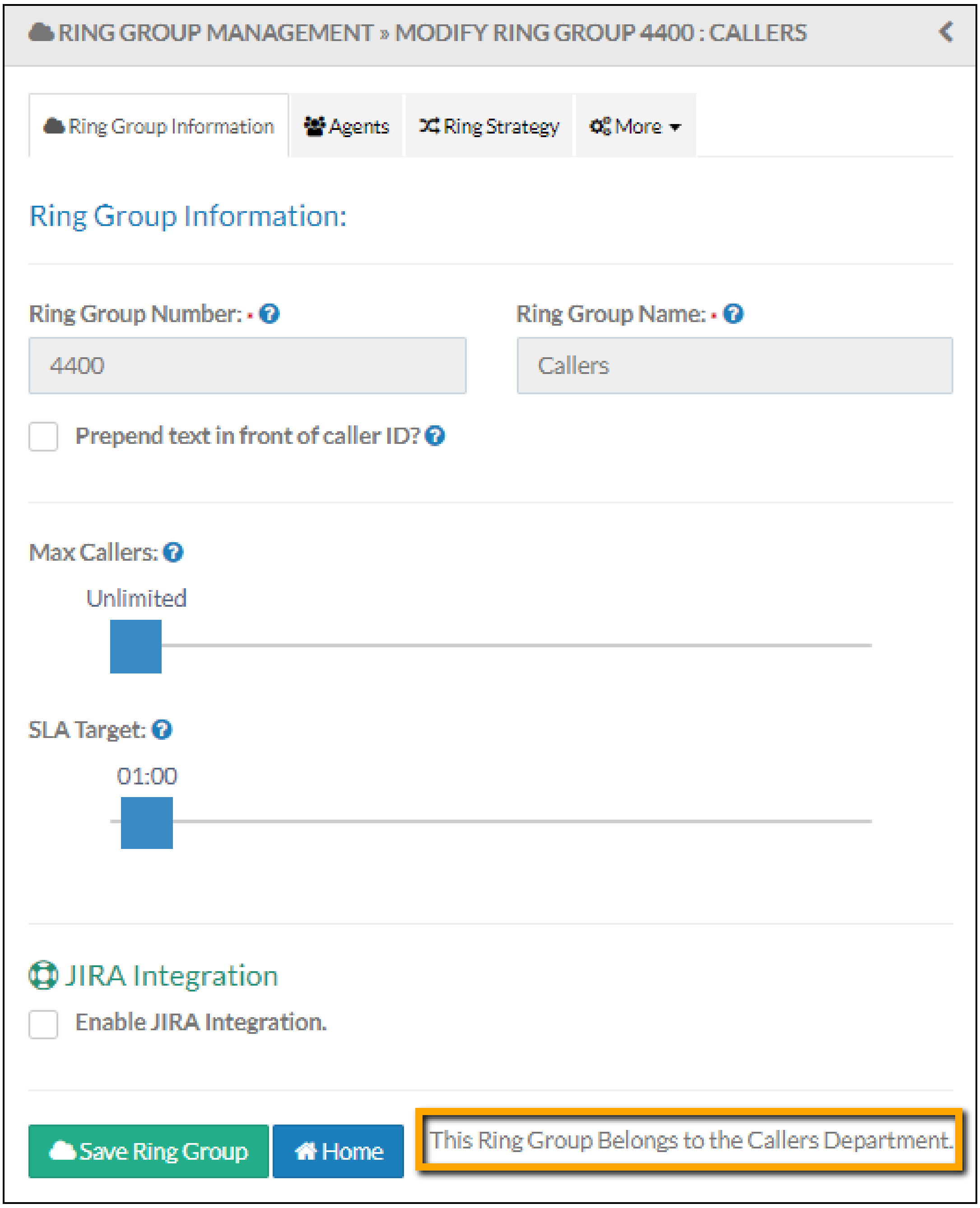
Edit Ring Groups from the Call Ring Groups main menu by clicking on the Ring Group Name to edit. Make the needed edits and click **Save Ring Group** when finished.

Delete Call Ring Group

Ring Groups can also be deleted in one of two ways:

- Ring Groups not associated with a Department can be deleted within the Ring Group Information tab.
- Ring Groups associated with a Department must be managed from **Users & Devices > Departments**.

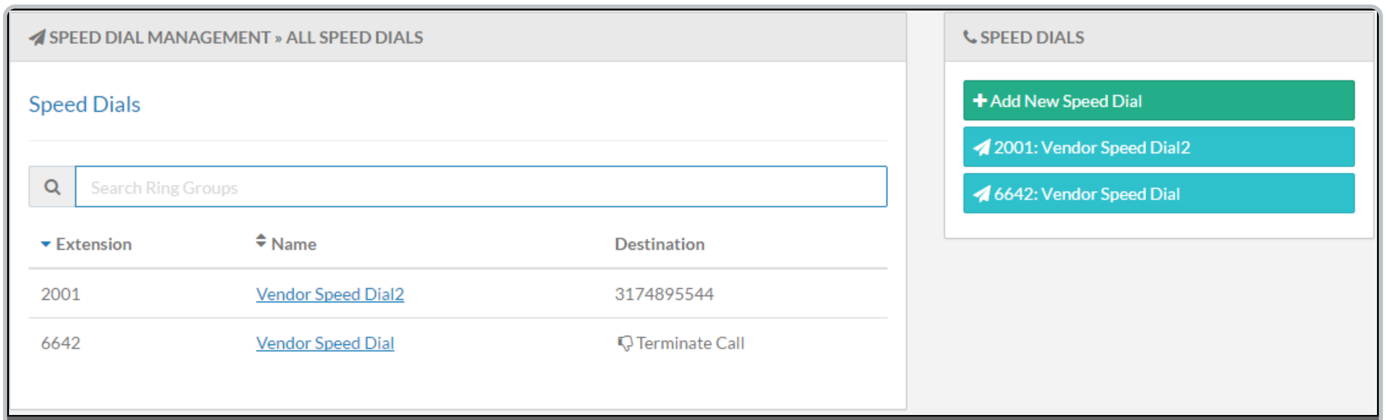
  Example: Ring Group associated with a Department indicator:


RING GROUP MANAGEMENT » MODIFY RING GROUP 4400 : CALLERS
Ring Group Information
Agents
Ring Strategy
More
Ring Group Information:
Ring Group Number:
4400
Ring Group Name:
Callers
Prepend text in front of caller ID?
Max Callers:
Unlimited
SLA Target:
01:00
JIRA Integration
Enable JIRA Integration.
Save Ring Group
Home
This Ring Group Belongs to the Callers Department.

Speed Dials

Last Modified on 10/03/2018 12:49 pm EDT

Speed Dials are used by the system to quickly dial either internal call flows or external telephone numbers. The **Speed Dial** menu as shown in Figure 01 below allows the Kerauno System Administrator to create and manage the speed dials available within Kerauno.



Speed Dial Menu

Understanding Ring Group Weights & Penalties

Last Modified on 06/03/2019 2:53 pm EDT

Ring Group Weights

Ring Group Weights are used to increase the priority of a call when multiple Ring Groups exist. Weights range from 1 to -10, with 1 being the highest. The higher the weight, the higher the priority of the call.

High Ring Group Weight (High Call Priority) = Call answered faster than other Ring Groups

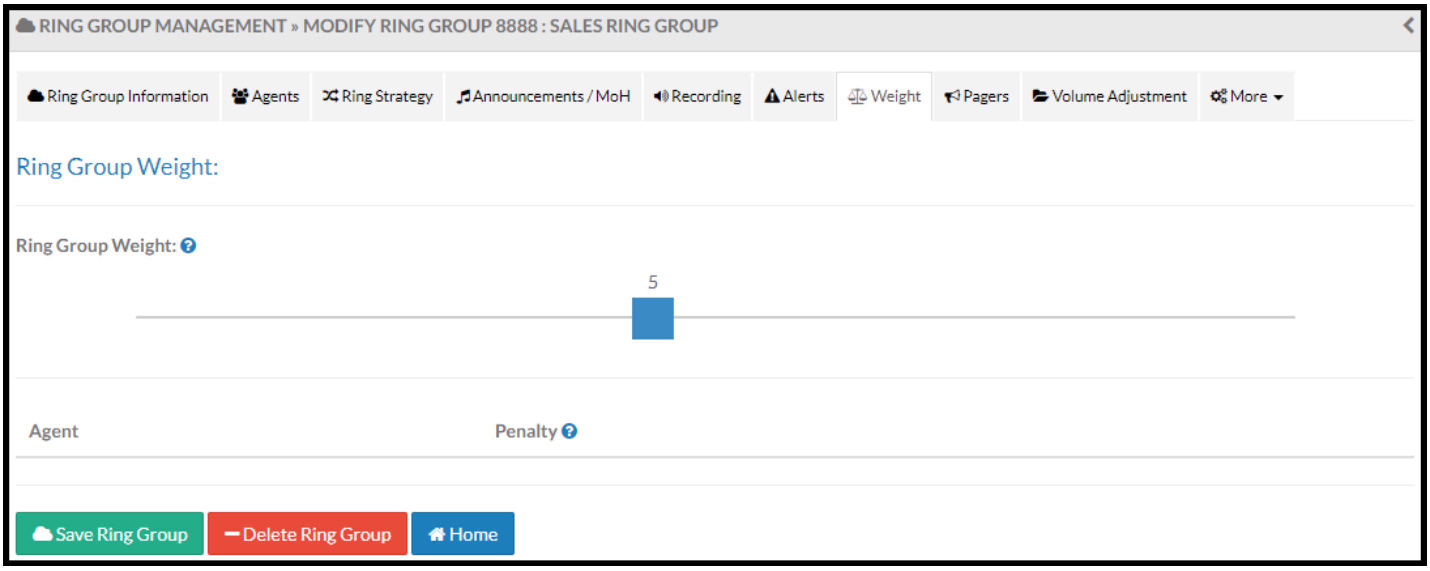
Calls are not answered simply according to total wait time when Ring Group Weights are applied. Instead, the Ring Group Weights assigned to the Ring Group are taken into consideration.

Examples of applying Ring Group Weights include:

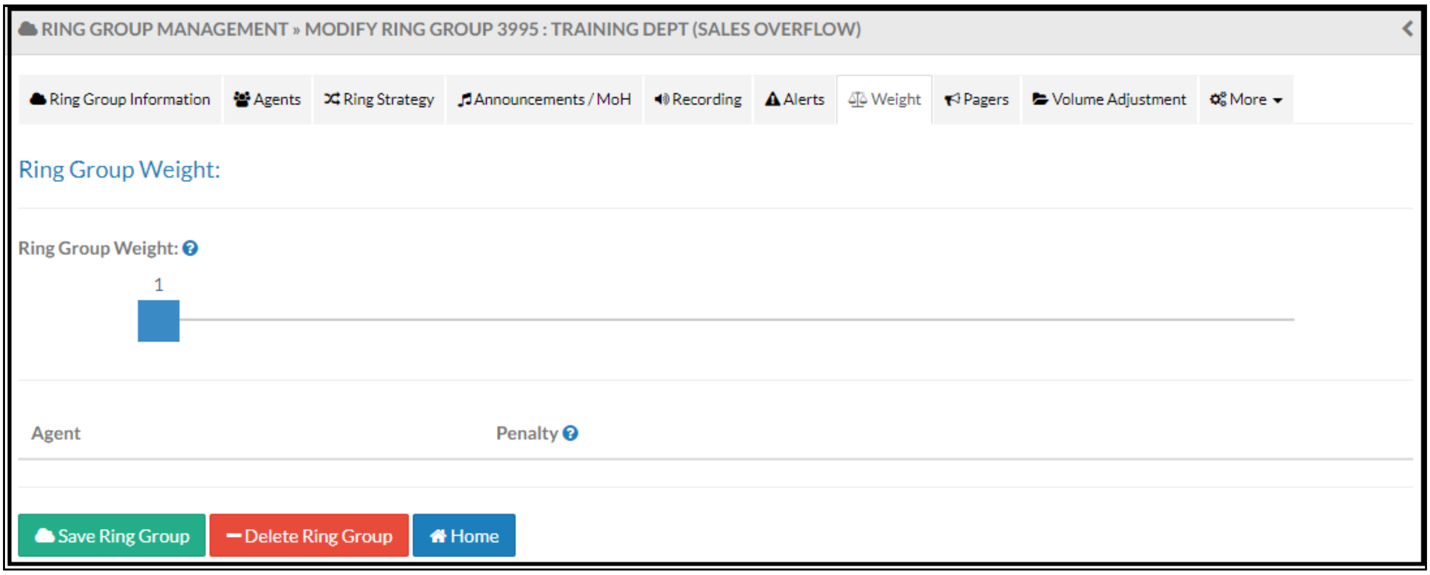
- An inquiry for a luxury condo is assigned a higher Ring Group Weight than corporate housing interest.
- The Training Department is assigned a lower Ring Group Weight than the Sales Ring Group.

In the example below, the Sales Ring Group has a higher Ring Weight than the Training Dept (Sales Overflow). Therefore, the Sales Ring Group receives more calls between the two Ring Groups.

Sales Ring Group with Ring Weight = 5



Training Dept. (Sales Overflow) with Ring Weight = 1



Ring Group Weight Best Practices

Assign higher Ring Group Weights to the highest priority Ring Groups.

Ring Penalties

Penalties are assigned to specific agents within the same Ring Group to establish a priority order of receiving calls. Penalties range from -10 to 10 with -10 being the lowest; and a default of 0. The lower the penalty, the more calls the agent receives.

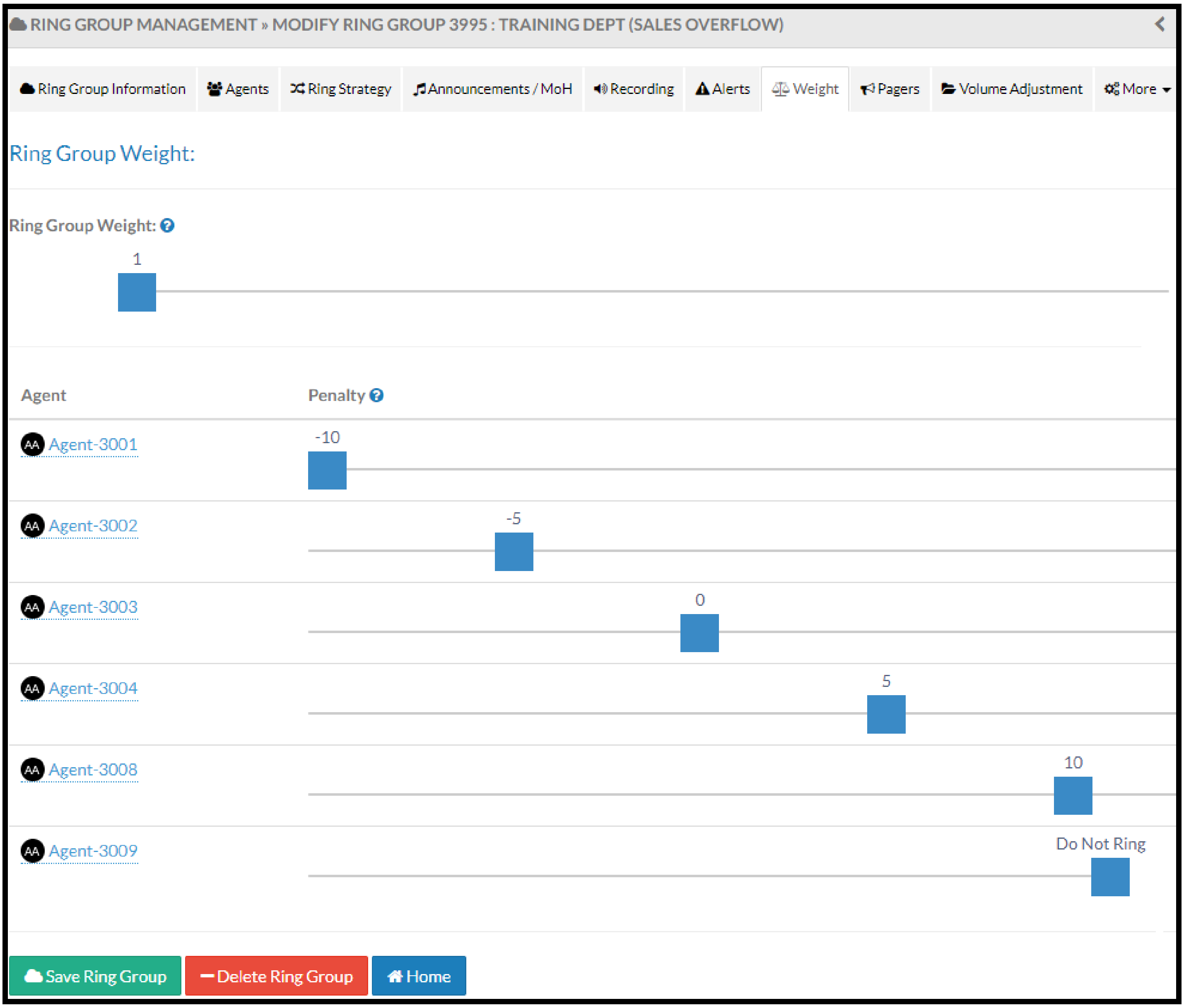
Lower Agent Penalty (Higher Priority) = Agent Receives More Calls

Note: Penalties apply only to **Ring All** and **Random Ring** Strategies.

When all agents in one Ring Group are unavailable, Kerauno automatically escalates to the next Ring Group and corresponding penalty level.

Ring Penalty example:

- Agent-3001 with the lowest Ring Penalty (-10) will receive the most calls.
- Agent-3002 with a Ring Penalty of -5 will receive fewer calls than Agent-3001, but more calls than agents with higher penalties.
- Agent-3009 is set to Do Not Ring and will not receive calls.



Penalties Best Practices

Assign penalties to establish ring priority based on agent experience level within a single Ring Group. Assign a **lower** penalty to more generalized agents that should receive calls first. Assign a **higher** penalty to a specialized agent that should receive calls only when others are busy.

A (Tier 1) Help Desk Ring Group is generally composed of agents offering the first line of customer support. Knowledgeable about the system; these agents capture the details of the customer request and perform basic troubleshooting with assistance from a knowledge base or internal resource. A Tier 1 Ring Group should handle the bulk of customer support needs.

A (Tier 2) in Depth Technical Support Ring Group should include the most experienced agents that can perform detailed troubleshooting, handle complex issues, and identify & escalate bugs.

Conference Rooms

Last Modified on 05/25/2018 8:55 am EDT

The **Conference Rooms** sidebar as shown in Figure 01 below allows the System Administrator to build and manage Ad-Hoc and Leader-Based conference rooms.

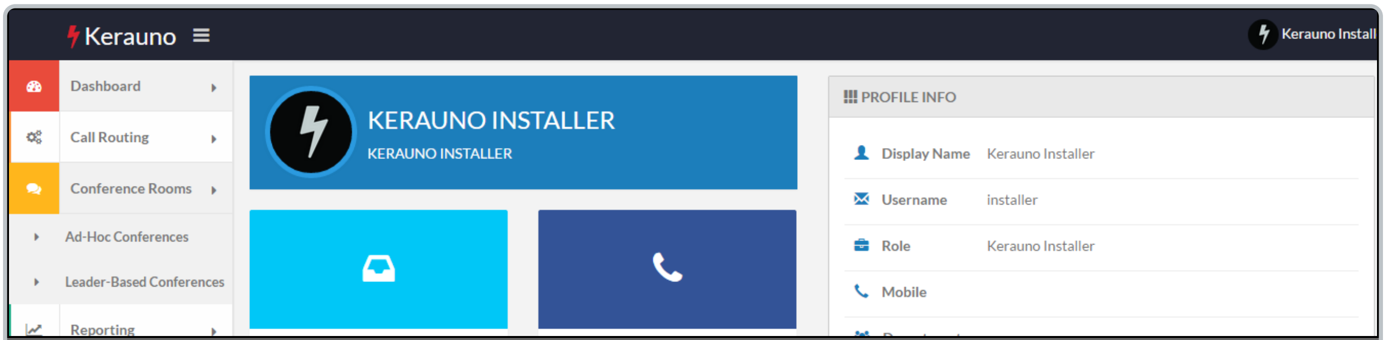


Figure 01: Kerauno's Conference Rooms Sidebar

Ad-Hoc Conferences

An Ad-hoc conference bridge remains open and available at all times. Participants can enter and exit at will. No credentials are required to either open a Conference Bridge or participate in one. System Administrators can set-up and manage Ad-Hoc Conference Rooms by using the menu as shown in Figure 02 below.

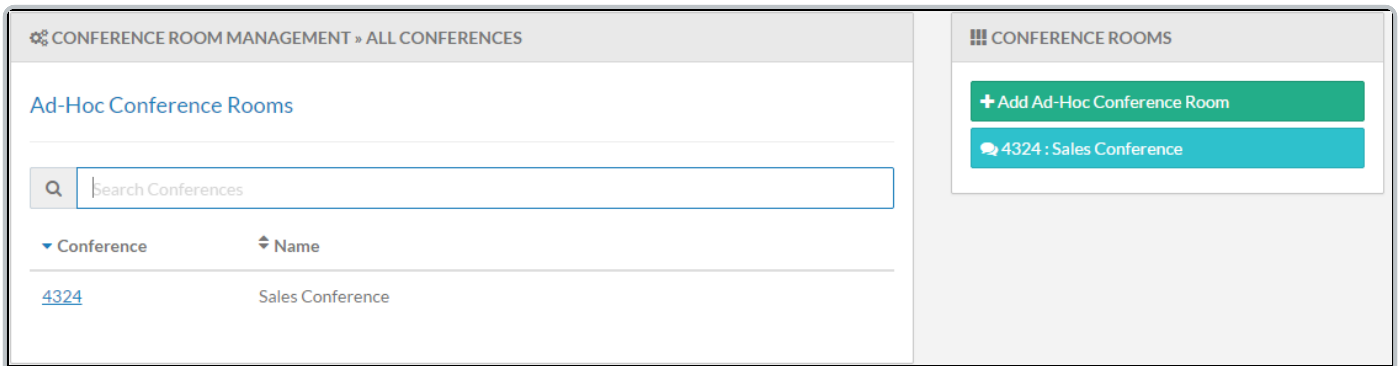
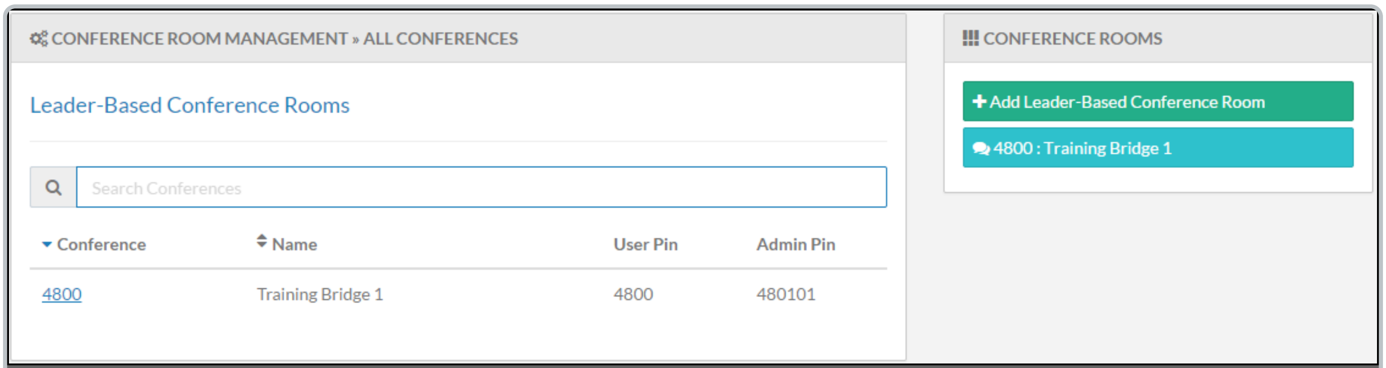


Figure 02: Ad-Hoc Conference Room Menu

Leader-Based Conferences

A Leader-Based Conference requires both a participant and leader PIN number to operate. Participants may dial into the conference room before the leader has arrived, however they will be kept on hold. As the conference leader enters the Leader PIN, all participants will bridge together and begin the conference call. As shown in figure 03 below, the **Leader-Based Conference Administration** page is similar to the Ad-hoc Conference Administration page. The only difference is the addition of PIN numbers to the room summary.



Leader-Based Conference Room Menu

Bulk Import

Last Modified on 10/03/2018 2:42 pm EDT

The Bulk Import process saves time and ensures multiple changes are made at the same time without conflict.

Administrators can use the Bulk Upload feature in Kerauno to upload information for blacklisting, devices, firewall rules, generic extensions, numbers, ring groups, SIP Trunks, Speed Dials, and Users. To use the bulk upload feature, select System Admin > Bulk Import from the menu at the left of the screen.

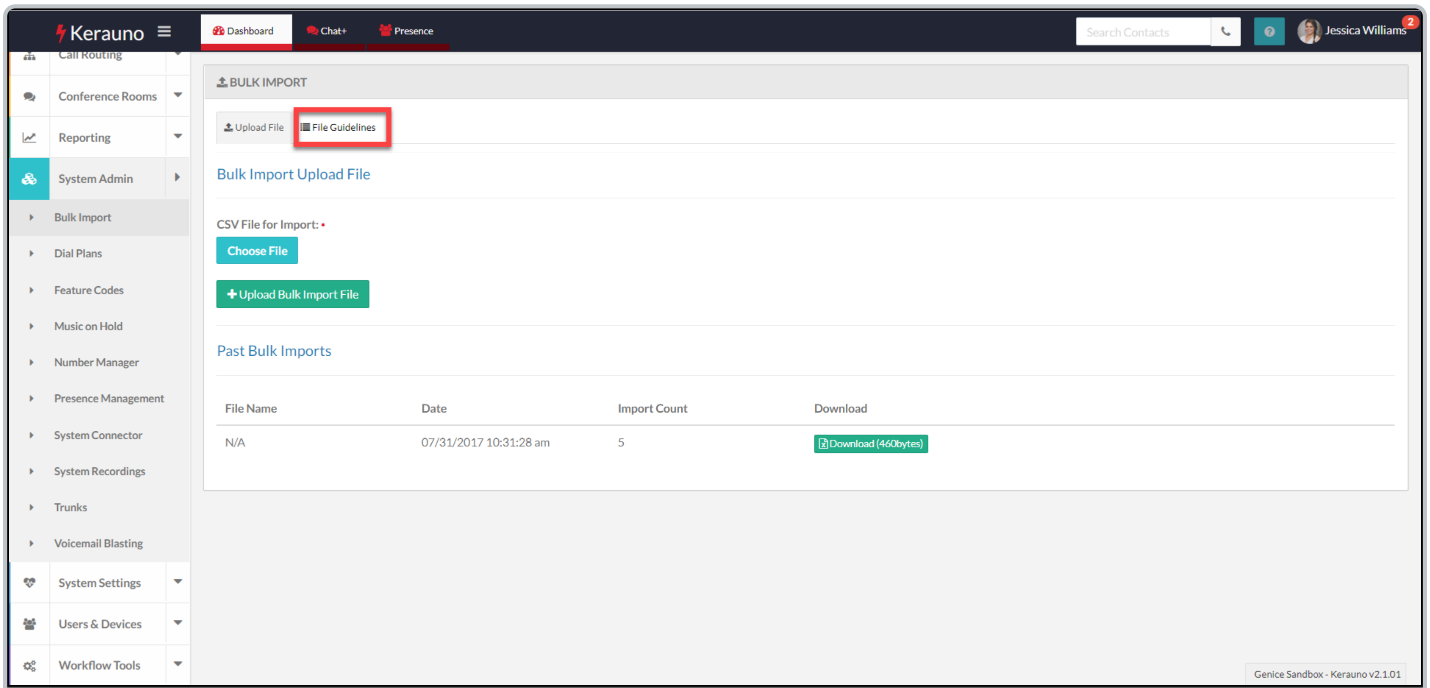


Figure 01 Bulk Import Screen

Select the **File Guidelines** tab to view information for constructing files to be uploaded.

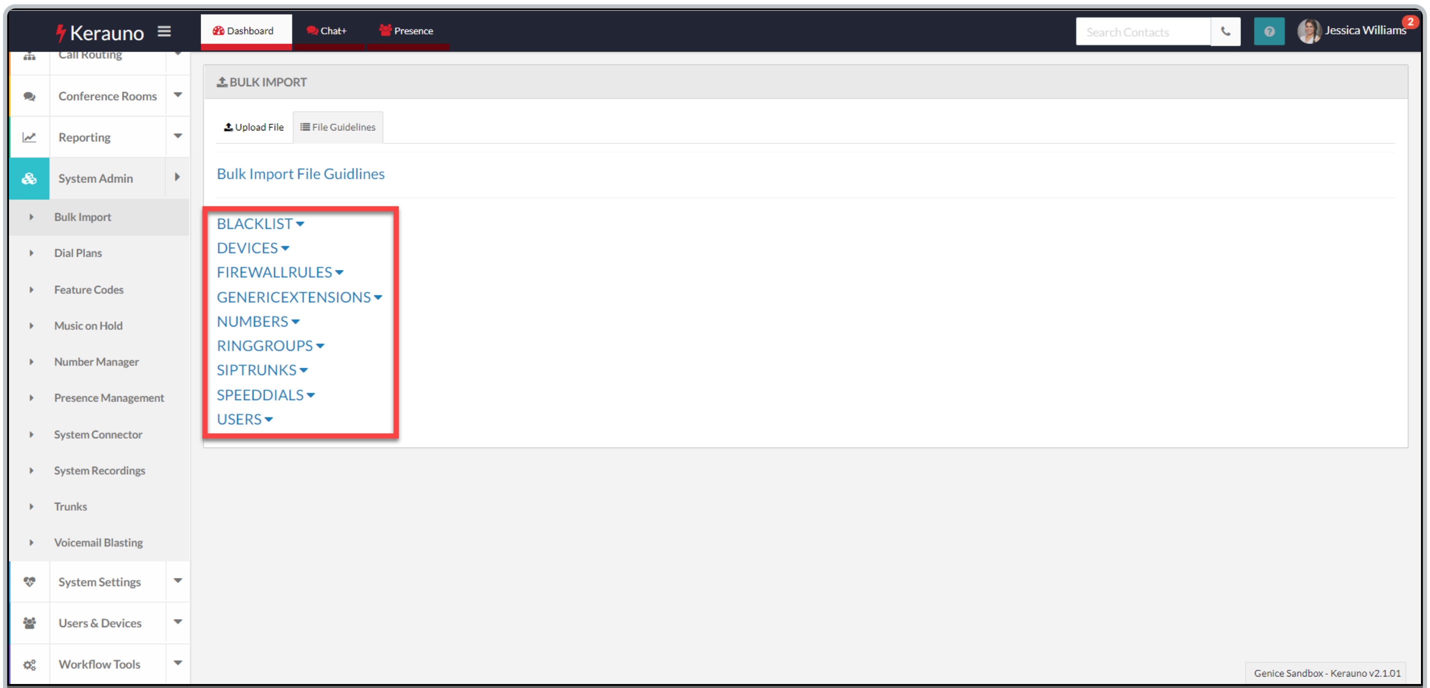


Figure 02 Bulk Upload > File Guidelines Tab

Select one of the listed topics to view requirements for that file.

NOTE:	All files for bulk upload must be CSV file types.

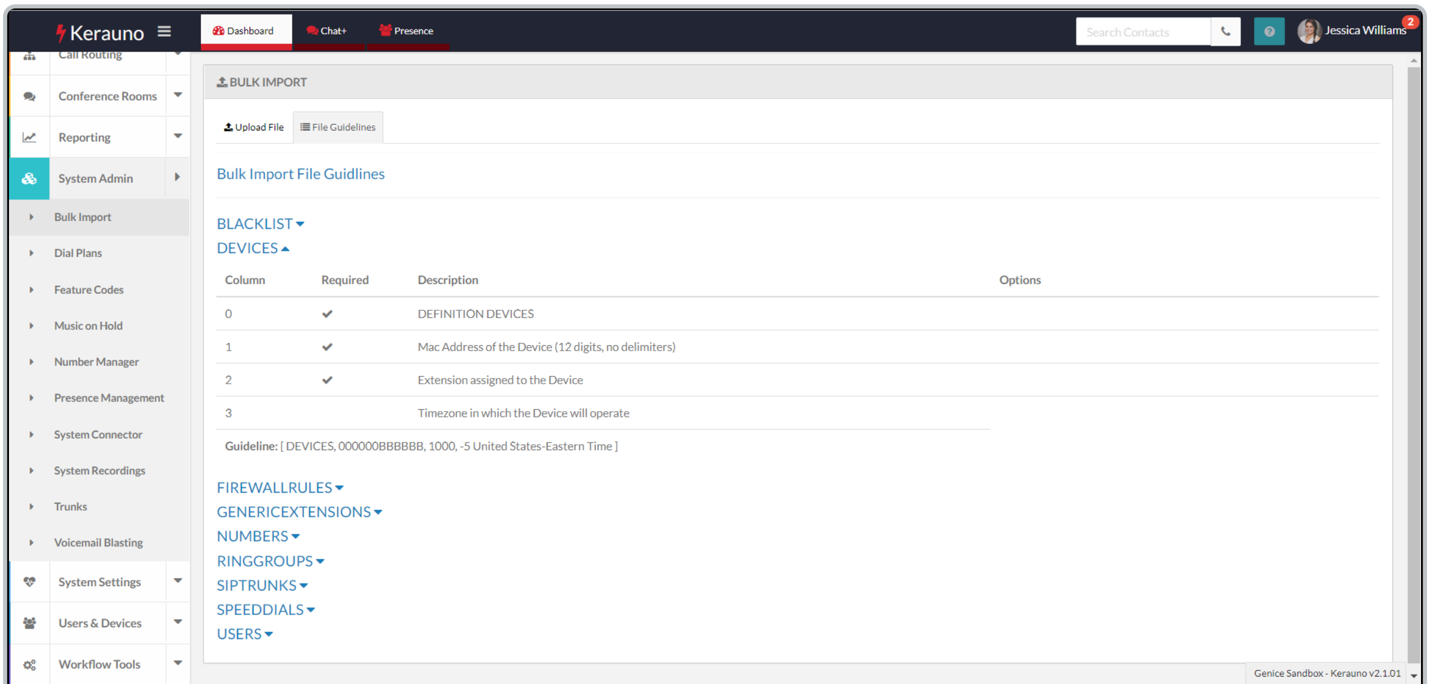


Figure 03 Bulk Import > File Guidelines Tab, File Requirements Displayed

Once you have created your file, select the **Upload File** tab to upload your file.

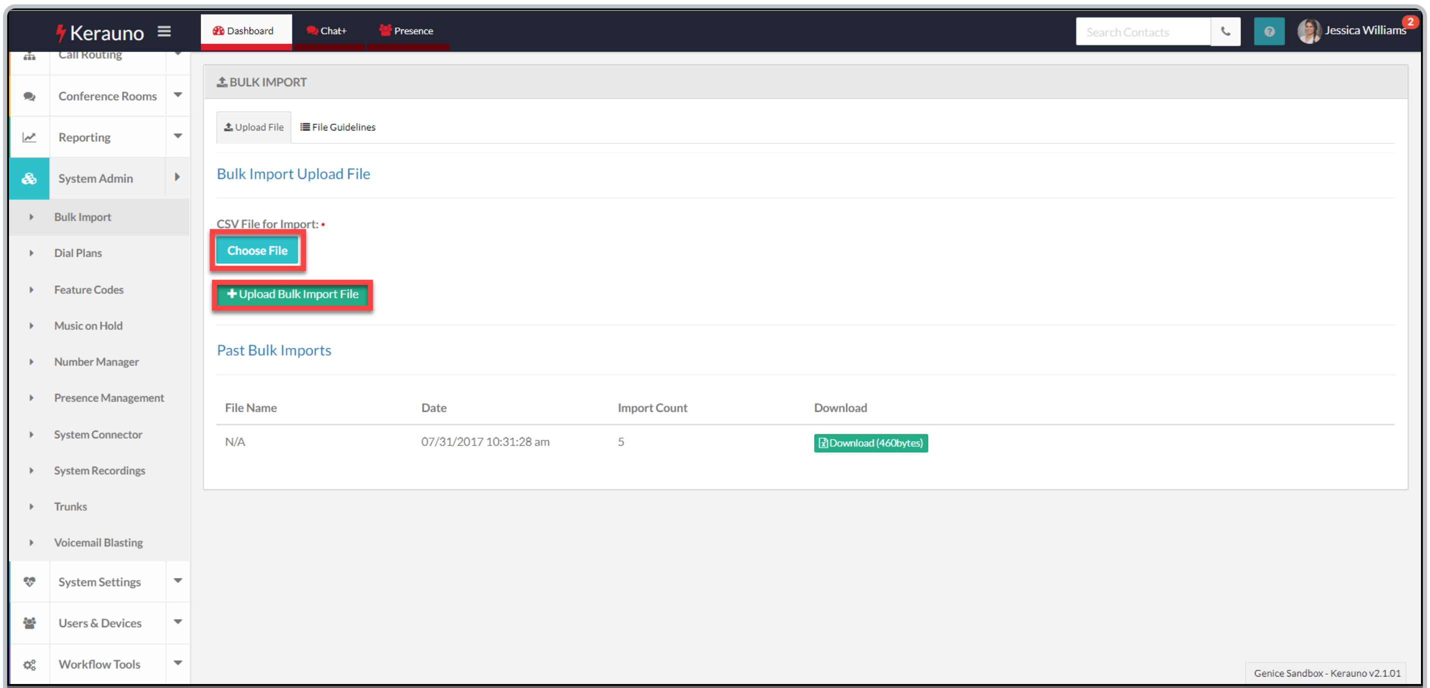


Figure 04 Bulk Upload Screen

Select the **Choose File** button to select the bulk upload file. Once the file has been chosen, select the **Upload Bulk Import File** button to upload your file.

Dial Plans

Last Modified on 11/17/2017 11:38 am EST

Building a Custom Dial Plan

Last Modified on 04/24/2019 10:27 am EDT

Administrators are able to create their own custom dial plan logic to specify which trunk and caller ID are to be utilized when a certain dialing pattern is matched.

To create a new **Custom Dial Plan**, click the green **+Add Custom Dialplan** button on the main **Dial Plans** menu as shown in Figure 01 below.

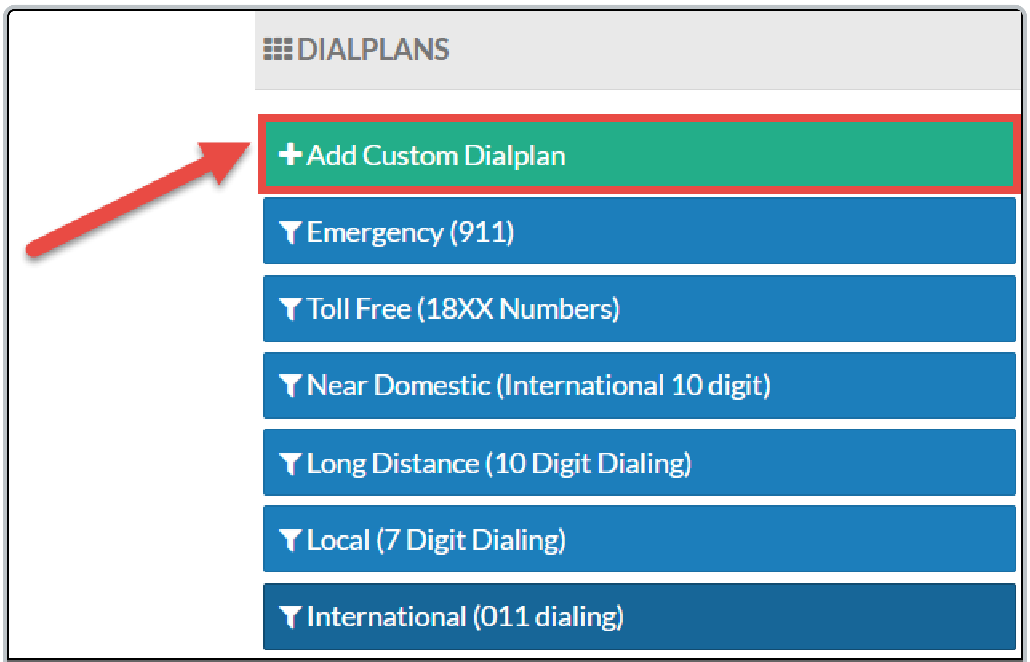


Figure 01: Add Custom Dial Plan

After clicking the **+Add Custom Dialplan** button, the **Dialplan Information** screen will display allowing the administrator to configure the new dialing pattern logic as well as set the desired trunk and caller ID information.

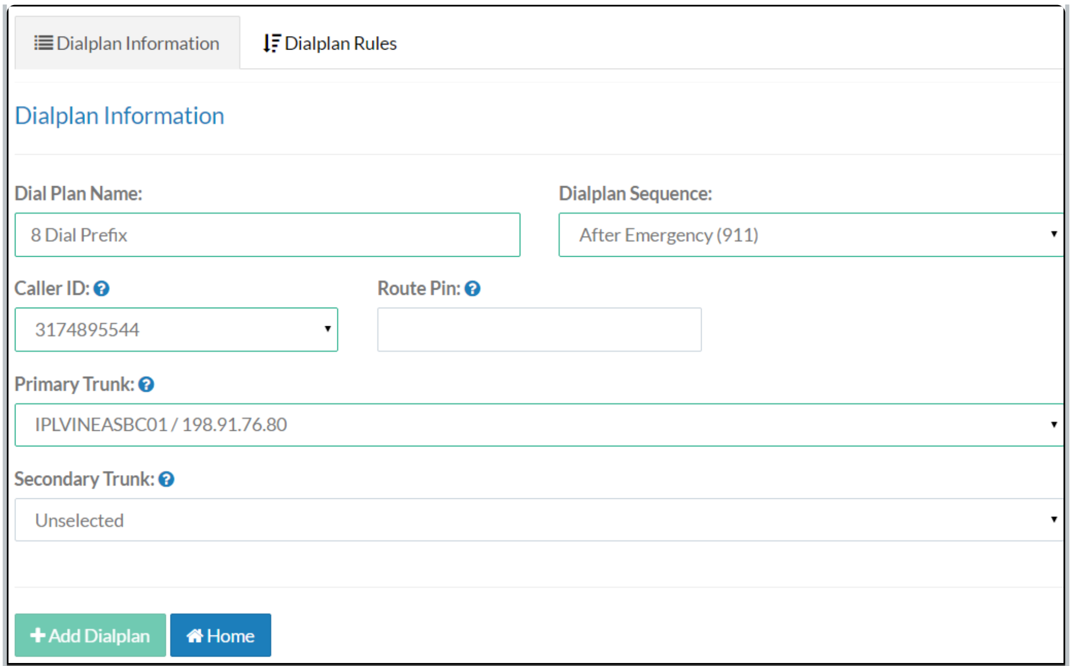


Figure 02: Dialplan Information

Dial Plan Name: Enter an easily recognizable name for the dial plan. This is used for administrative purposes only.

Dial Plan Sequence: This field determines the order the dial plan will be built in the **Dial Plan List**. Dial plans near the top of the list are analyzed first, while lower dial plans are analyzed last. For example, a custom dialplan is built that uses the dialing plan rule **1-800-XXX-XXXX.**

If this new custom dial plan is placed in the sequence *before* the default "Toll-Free" dialing plan, then the custom dial plan will be successfully used. If the custom dial plan is set *after* the default "Toll-Free" dialing plan in the sequence, then the custom dial plan will not be used. This is because the dialing pattern will match the default "Toll-Free" dial plan *first* and the custom dial plan logic will not be reached because a match has already been found. When two dial plans use the same logic, the one that is first in the sequence will be used.

In most cases, it makes sense to set the **Dial Plan Sequence** for a custom dial plan as "After Emergency (911)" as it will ensure that the custom dial plan is used first.

NOTE:	**Emergency (911)** must always be the first dial plan in the sequence. The system will always check if 911 is dialed first and then move on to lower custom and default dialing plans.

Custom Dial Plan Rules

The **Dialplan Rule** is a set of digits and routing rules that determine if or when the custom dial plan should be used. If an extension dials a specific set of numbers that matches one of the dialplan rules, then the call will utilize the custom dial plan.

There are three fields on the **Dialplan Rules** menu: Prepend, Prefix, and Match Pattern.

Prepend: Digits entered into the **Prepend** field will be added at the beginning of a number when the dialed number successfully matches a **Match Pattern**. Upon a match, whatever value is entered as a “prepend” will be added to the dialed number before the call is sent to its end destination.

Prefix: The **Prefix** field is a value that is to be removed when a number successfully matches one of the **Match Patterns**. Upon a match, the value entered into this field is stripped from the dialed number before the call is sent to the end destination.

Match Pattern: When a number is dialed, Kerauno compares the digits dialed to the existing match patterns built into the phone system. If a match is found, then the call is sent to the matching dial plan. Below are the characters that can be used to create new patterns as well as examples of each.

X matches any digit from 0-9

Z matches any digit from 1-9

N matches any digit from 2-9

[1237·9] matches any digit in the brackets (example: 1,2,3,7,8,9)

Examples:

NXXXXXX This pattern would match any 7 digit number starting with 2-9

1XXXXXXX This pattern would match any 7 digit number dialed that is preceded by a 1.

888NXXXXXX This pattern would match any toll free number that begins with 888 whose 4th digit is between 2-9.

2[0-5]XXXXXXXX – This pattern would match any 10 digit number with an area code of 200-250.

Dial Plan Rule Examples:

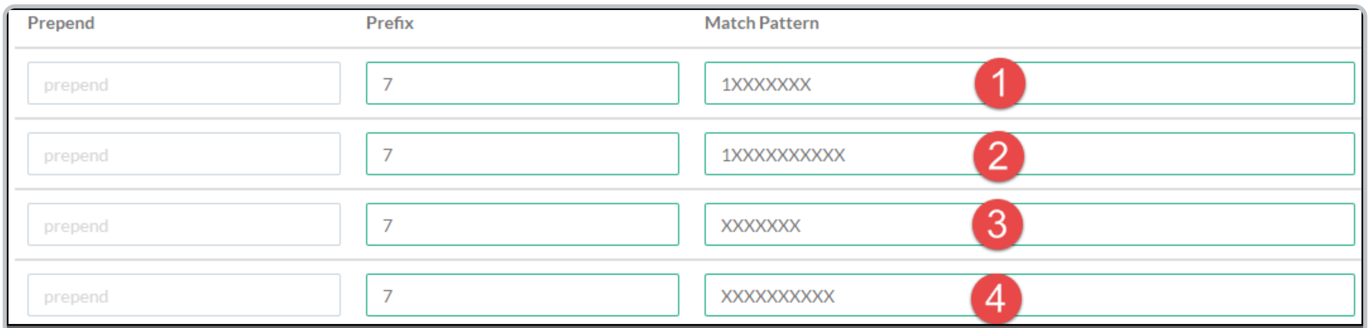


Figure 03: Four Custom Prefix Match Patterns, Example 1

This configuration would be useful if attempting to use dial plans to use a different caller ID or trunk when the calling party dials "7" before the number. All patterns have a prefix of 7.

1. The first pattern listed will be matched if a caller dial 7, 1, and then any 7-digit number.
2. The second pattern will be matched if a caller dials 7,1, and then any 10-digit number.
3. The third pattern will be matched if a caller dials 7, and then any 7-digit number.
4. The third pattern will be matched if a caller dials 7, and then any 10-digit number.

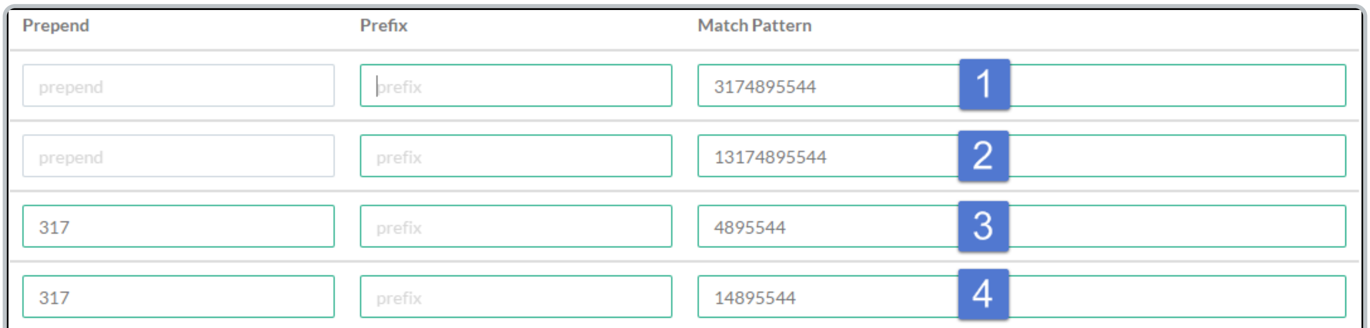


Figure 04: Four Custom Match Patterns, Example 2

This configuration would be useful if attempting to use dial plans to use a different caller ID or trunk when a specific number is dialed. In this case, 317-489-5544 is used.

1. The first pattern listed will be matched if a caller dials 317-489-5544
2. The second pattern will be matched if a caller dials 1-317-489-5544.
3. If a caller dials 489-5544 a 317 area code will be pre-pended and the call will

dial 317-489-5544

4. If a caller dials 1-489-5544 a 317 area code will be pre-pended and the call will dial 317-489-5544.

Dial Plans Overview

Last Modified on 04/24/2019 1:06 pm EDT

Dial Plans control how the phone systems routes outbound traffic over the trunks connected to Kerauno. A Dial Plan works by detecting the length and type of the number dialed (for example 7-digit, 10-digit, international dialing etc.). Kerauno then sends the call using the trunk and caller ID settings of the matching dialing plan. When configuring a dial plan, Administrators can select the desired outbound caller ID, primary outbound trunk, secondary trunk, or lock a dial plan with a pin number. There are currently five default dial plans built into Kerauno:

Figure 01: Kerauno Default Dial Plans

Emergency: When a caller dials 911, the call will use the emergency dialing plan.

Toll Free: When a caller dials a 1-8XX number, the call will use the Toll Free dialing plan.

Near Domestic: When a caller dials any international 10 digit number (Ex. Canada or Caribbean), the call will use the Near Domestic dialing plan.

Long Distance: When a caller dials any 10 digit number, the call will use the Long Distance dialing plan.

Local: When the caller dials any 7 digit number, the call will use the Local dialing plan.

International: When the caller dials a 011+Country Code for an international call, the call will use the International dialing plan.

NOTE:	**Long Distance vs Local:** If a call uses the **Long Distance** dial plan, it does not necessarily mean that you will be charged long distance rates by your carrier. If the number originates from a local caller ID, calls to the same area code will still be seen by your carrier as a local call (e.g., If 317-555-555 Caller ID calls 317-555-1234).

Modifying a Dial Plan

Last Modified on 04/24/2019 10:29 am EDT

Dial Plans control how the phone systems routes outbound traffic over the trunks connected to Kerauno. These dial plans can easily be edited/modified by administrators. Clicking one of the six default dial plans allows the administrator to make modifications to the caller ID and trunking settings for a specific dial plan.

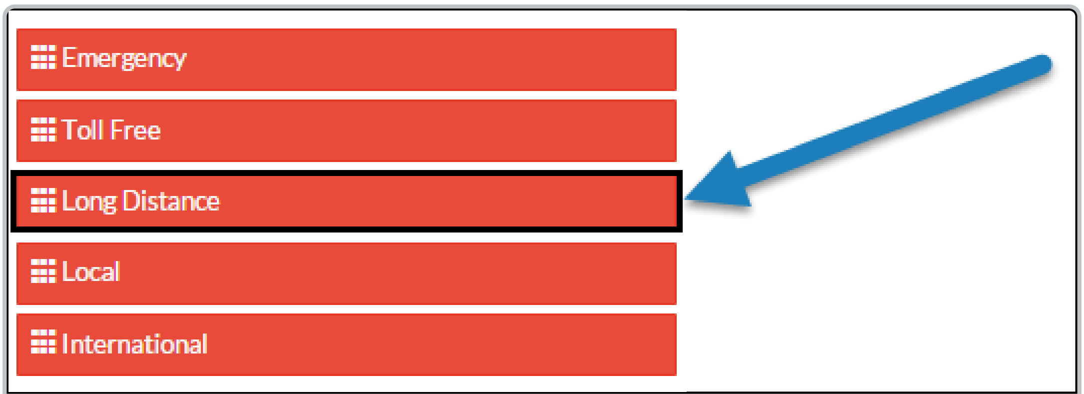


Figure 01: Kerauno Default Dial Plans

Caller ID

In the **Caller ID** field, select a **Caller ID** to use when a specific dial plan is detected on an outbound call. The available caller IDs list is populated from the numbers currently built in the **System Admin> Number Manager** menu.

NOTE:	The caller ID set here will not override the **Caller ID** set in the **Extensions** tab under the **Users and Devices > Users** menu. If the **Extension Caller ID** is not set, the **Dial PlanCaller ID** field will be used. This feature allows administrators to choose which caller ID is sent when they are dialing local, long distance, international, or to a specific number.

Figure 02: Manage Caller ID

NOTE:	In some cases the caller ID is controlled by the carrier. If you are having problems with **CallerID** or the caller ID selected in the dial plan is being overridden by another number, please contact your carrier.

Primary Trunk

In the **Primary Trunk** field, select the trunk to be utilized for outbound calls when a specific dial plan is detected. The list of available trunks is populated with the list of trunks currently built in the **System & Settings > Trunks** menu. If the **Primary Trunk** is unavailable, returns a busy signal, or reaches a concurrent call limit, the call will attempt to utilize the trunk listed in the **Secondary Trunk** field.

Secondary Trunk

In the **Secondary Trunk** field, select a secondary, or backup, trunk to be utilized for outbound calls when a specific dial plan is detected. The **Secondary Trunk** will only be used when the connection to the primary trunk fails, returns a busy signal, or the trunk’s concurrent call limit is reached.

Route PIN

System administrators may enter a four-digit PIN number that locks a specific dial plan. When an outbound call is placed to a PIN-enabled dial plan, Kerauno will prompt the user to enter a PIN number before connecting the call.

NOTE:	It is highly recommended that system administrators place a **Route PIN** on the International dial plan. This will protect your system from Toll-Fraud and allow cost control on expensive international calling charges.

Local Dialing Plan Prefix

When modifying the **Local** dialing plan, there is an additional option to enter a **Local Prefix**. To enable the use of 7-digit dialing (555-5555), a **Local Prefix** must be entered in this field. The local prefix is the area code to be pre-pended to the seven-digit number that is dialed. For example, putting 317 in the **Local Prefix** field and dialing 555-5555 would connect the caller to the number at 317-555-5555.

Emergency Dial Plan

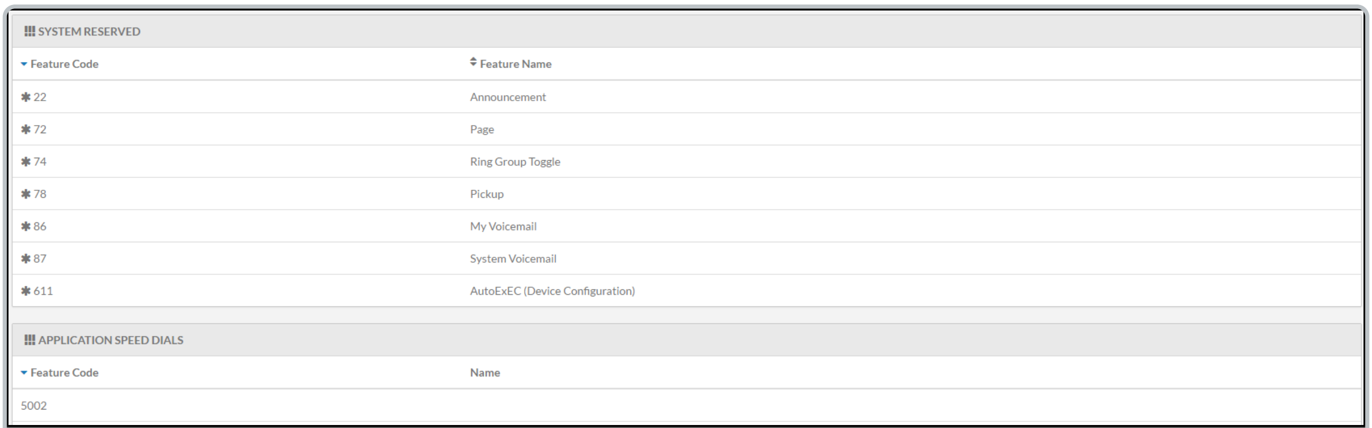
Take care to ensure the accuracy of the **Caller ID** field in the **Emergency** dial plan. The **Emergency CID** defined here *will not* overwrite the **Emergency Caller ID** defined in the **Extensions** tab under **Users & Devices > Users.** Kerauno will utilize the **Emergency Caller ID** set in the **Emergency** dial plan only if an **Extension Caller ID** is not set for the extension that is dialing 911.

NOTE:	It is very important that you have your dial tone/telecommunications provider associate your **Emergency Caller ID** number to the physical address of the user(s). The address your carrier has on file for the **Emergency Caller ID** number set here will be sent to a local 911 answering center to ensure a timely response. If you have any doubts about the service address provided to a number, please contact your telephone carrier.

Feature Codes

Last Modified on 04/24/2019 11:24 am EDT

The **Feature Codes** menu shows all feature codes, speed dials, and ring groups that are currently built into Kerauno. The feature codes under the **System Reserved** menu include the dial codes required to access voicemail, log in and out of ring groups, configure a phone, etc.



SYSTEM RESERVED

Feature Code	Feature Name
*22	Announcement
*72	Page
*74	Ring Group Toggle
*78	Pickup
*86	My Voicemail
*87	System Voicemail
*611	AutoExEC (Device Configuration)

APPLICATION SPEED DIALS

Feature Code	Name
5002	

Figure 01: System Reserved Feature Codes Menu

The second section of this menu, **Application Speed Dials**, contains all extension shortcuts for speed dials and ring groups built into Kerauno. For example, if in the **Call Routing** menu a speed dial 8000 and ring group 5002 were created, both would be labeled and displayed under the **Application Speed Dials** menu.

Music on Hold
Last Modified on 11/17/2017 11:38 am EST

Music on Hold Overview

Last Modified on 05/25/2018 9:43 am EDT

The **Music on Hold** menu is where System Administrators can upload customized music/announcements and also manage exactly what callers are hearing while on hold. In this menu, all music on hold is organized into different playlists.

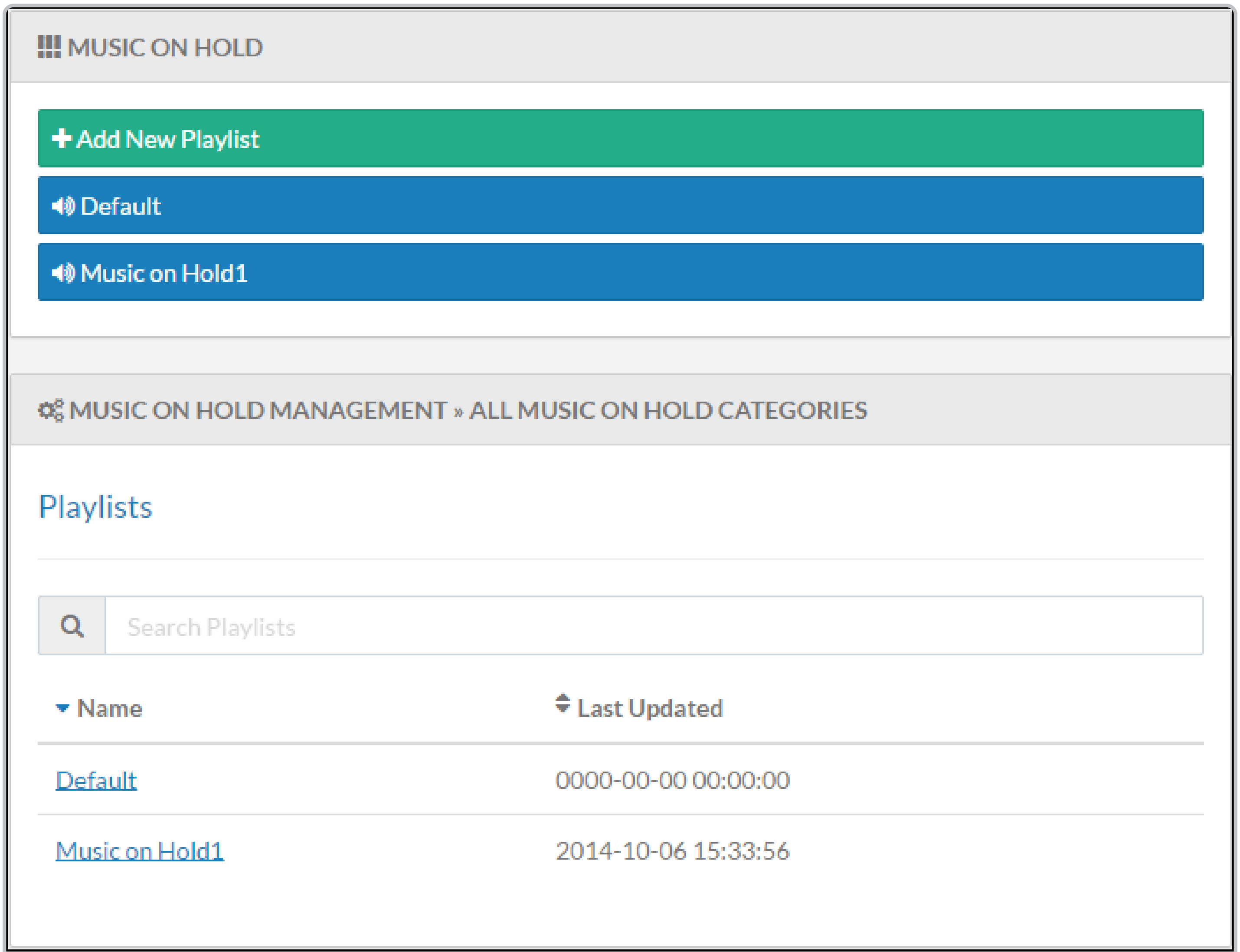


Figure 01: Music on Hold Screen

NOTE:	The supported audio file formats for any audio files uploaded to Kerauno are .mp3 or .wav.

Add New Music on Hold Playlist

Last Modified on 05/25/2018 9:44 am EDT

The **Music on Hold** menu is where System Administrators can upload customized music/announcements and also manage exactly what callers are hearing while on hold.

The **Music on Hold** menu is located within the **System Admin** section of the navigation sidebar.

To add a new **Music on Hold** playlist, select the green **Add New Playlist** button to the right side of the **Music on Hold** menu as shown in the Figure 01 below.

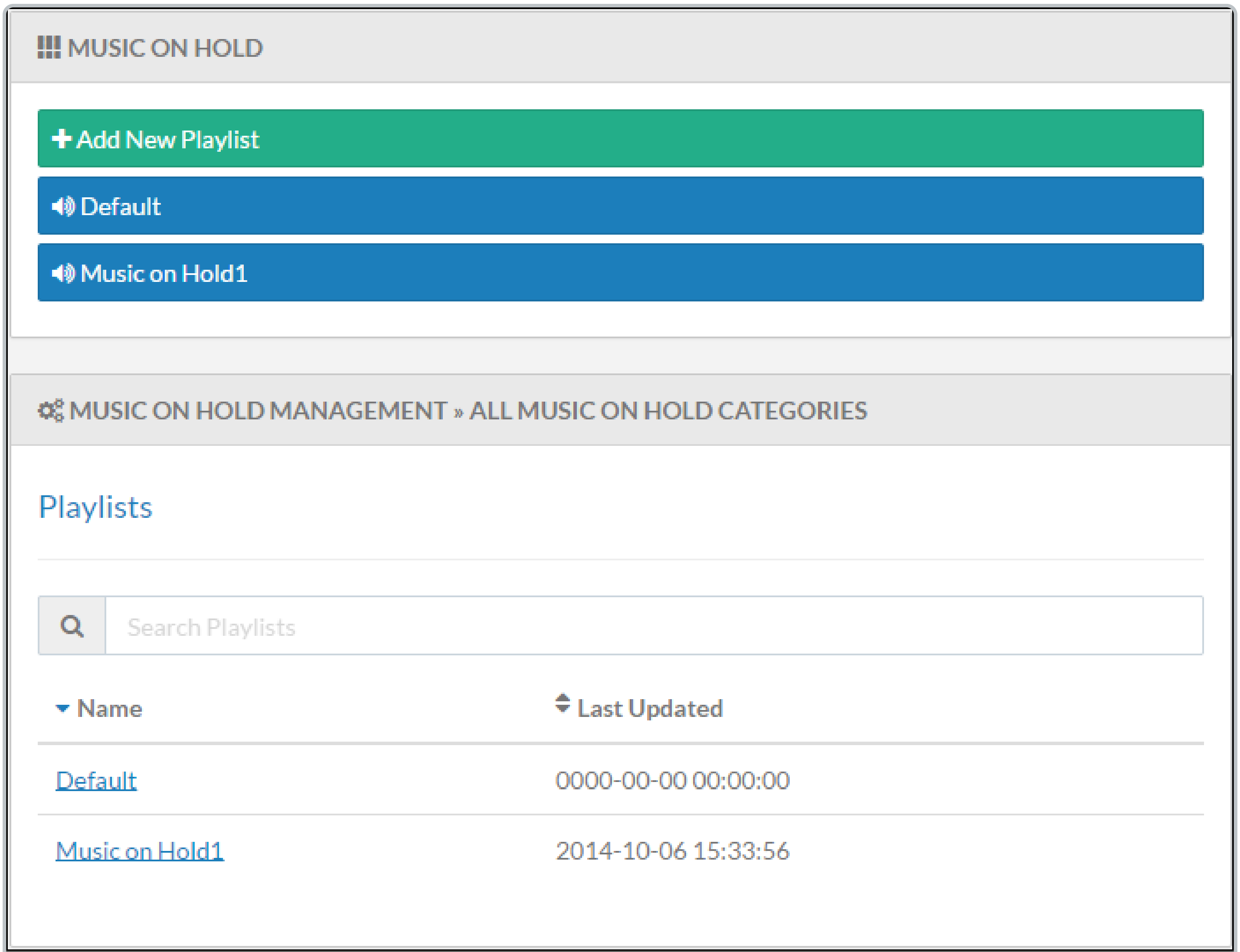


Figure 01: Music on Hold Screen

After selecting **Add New Playlist,** the **Music on Hold Management >Add Music**

on Hold Menu is displayed. From this menu the System Administrator can create a new playlist.

Playlist Name

The **Playlist Name** field sets the name of the playlist being creating in Kerauno. This name will be displayed throughout Kerauno when configuring music on hold in a ring group, etc.

Description

The **Description** field allows the administrator to set the description of the particular audio tracks being uploaded.

Audio Track

Selecting the **Choose File** button under the **Audio Track** setting allows the administrator to select a .mp3 or .wav file from their local drive to upload to Kerauno.

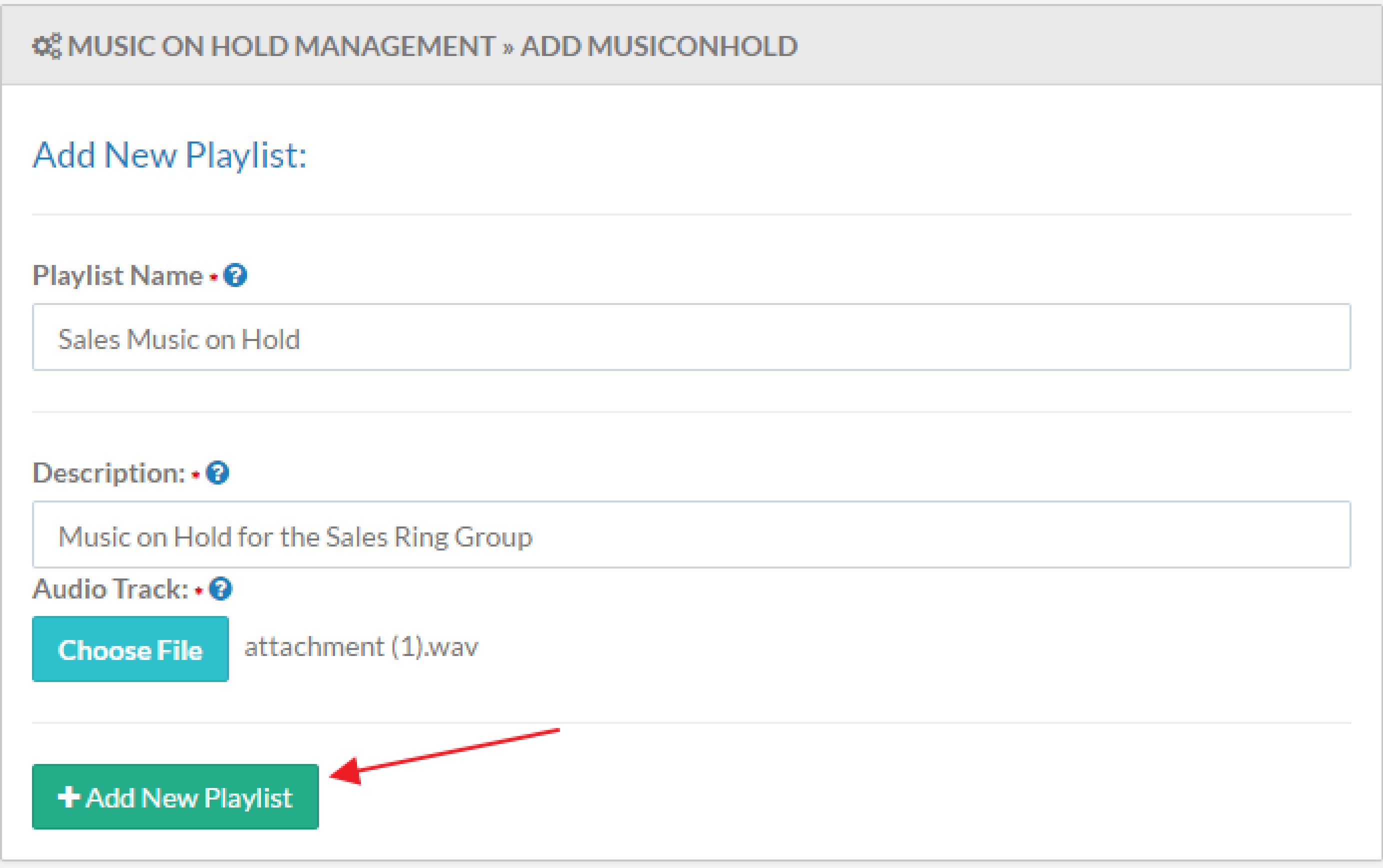


Figure 02: Add Music on Hold - Add New Playlist Button

When all **Add Music On Hold** fields have been completed, click the **Add New Playlist** button to edit the playlist (add new music).

NOTE:	Playlists will also appear under **Music on Hold** option under the **Call Flow > Ring Groups > MOH/Announcements** menu.

NOTE:	Following the instructions above will create a playlist with only one (1) audio track. If you would like to have more than one audio track or modify the configurations of a new playlist, you must build the new playlist then follow the **Edit Existing Playlist** instructions.

Edit Existing Playlist

Last Modified on 05/25/2018 9:45 am EDT

The **Music on Hold** menu is where System Administrators can upload customized music/announcements and also manage exactly what callers are hearing while on hold.

To edit an existing playlist, click the blue playlist name from the **Music on Hold Menu** as shown in the Figure 01 below.

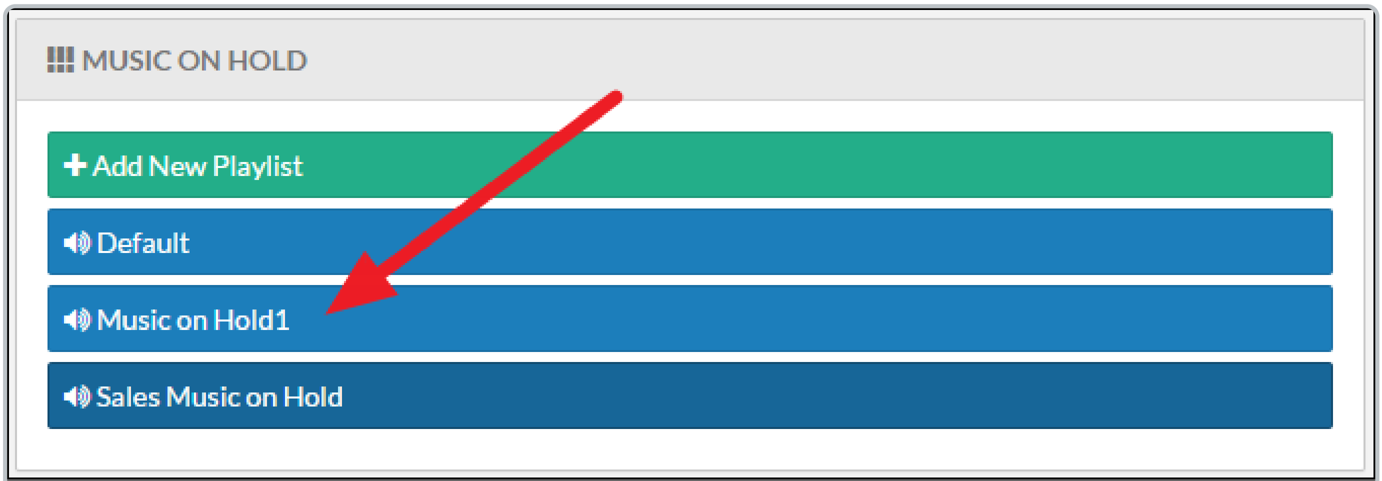


Figure 01: Music On Hold - Edit Playlist

Music on Hold Management Settings

Clicking any of the playlists from the **Music on Hold** menu will open the **Music on Hold Management** screen. From this screen, administrators can add additional tracks to a playlist, alter the order in which tracks will play, and remove recordings.

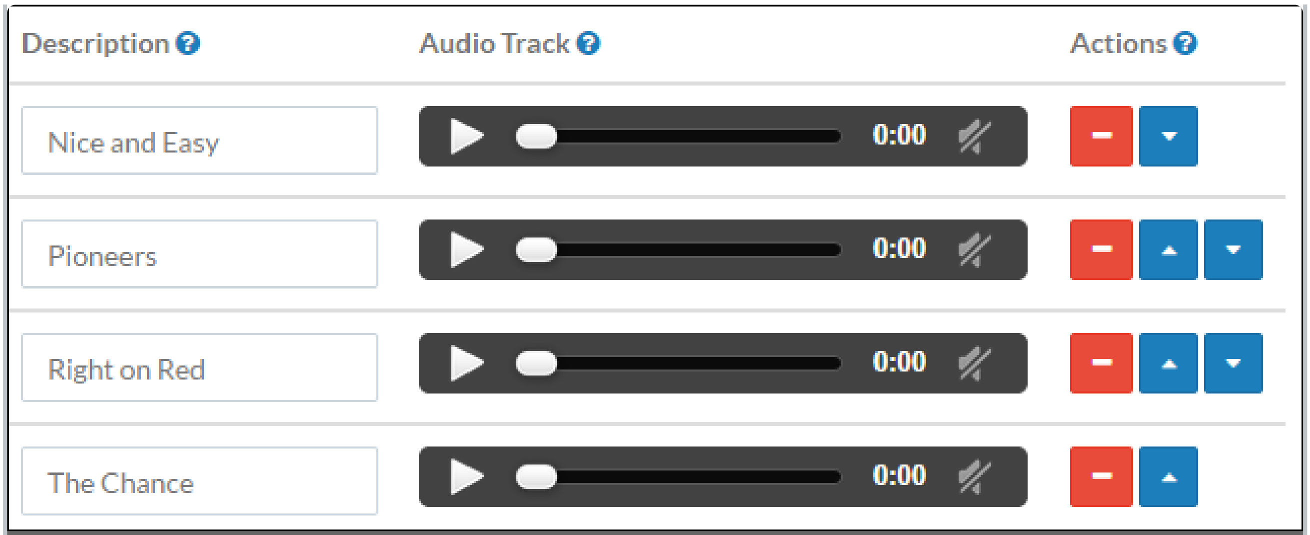
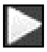


Figure 02: Music on Hold Management Screen

From the **Music on Hold Management** screen, administrators can modify, listen to audio tracks that have been uploaded to Kerauno and order the playlists. The **Description** field is a name given to a track so that it can be easily identified; it has no effect on Music on Hold functionality. The **Audio Track** media player allows administrators to listen to recordings uploaded to Kerauno. To listen to a track press the  button.

Adding Music to an Existing Playlist

Clicking the **Add Music to Playlist** button allows new tracks to be added to a playlist. A prompt will open to enter a name for the new track and to upload an audio file in .wav or .mp3 format.

NOTE:	Ensure that you pressed **Save Playlist** before adding a new track - adding new tracks will erase any pending changes.

Music on Hold Ordering

Last Modified on 05/25/2018 9:45 am EDT

Administrators have the ability to determine the order the **Music on Hold** tracks play in any specific playlist. The blue and red buttons on the right-hand side of the **Music on Hold** menu allow the administrator to order the tracks. Tracks will be played from top to bottom, with the first track on this list being played first and the last track on the list being played last.

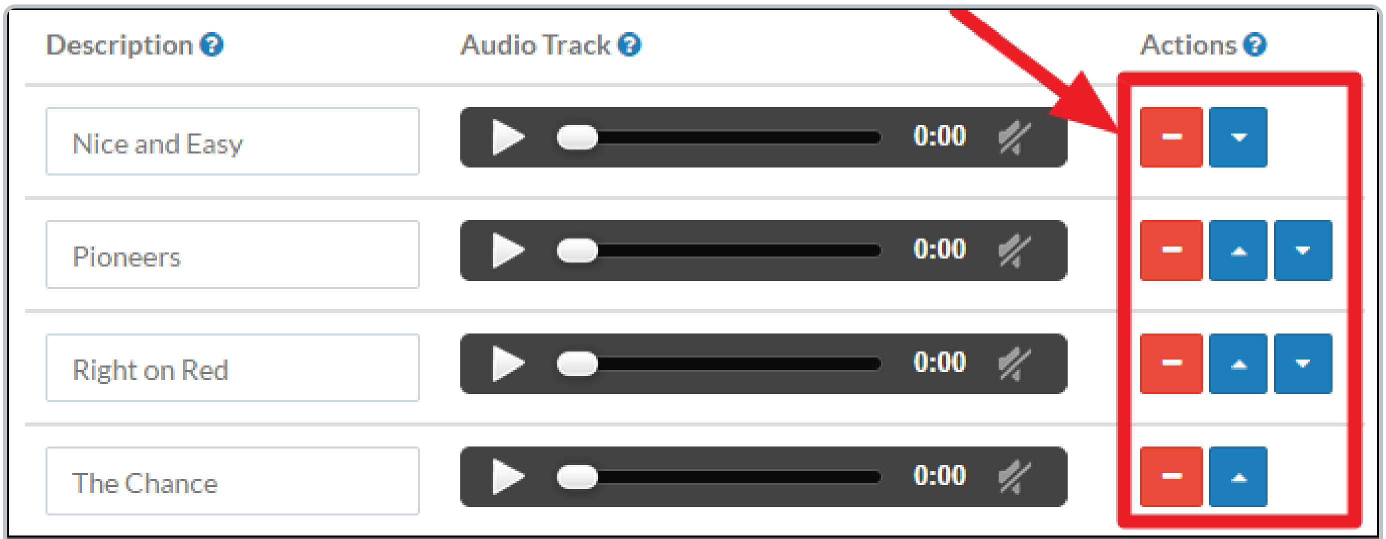
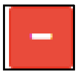
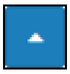


Figure 03: Music on Hold Screen - Ordering Buttons

The red minus button () removes a specific track from the playlist. After selecting this button the track will be removed from the playlist and will no longer show in the **Music on Hold Management Menu**.

The blue up arrow button () allows the user to move a specific track higher in the playlist.For instance, to move the track "Pioneers" in Figure 03 to play first, click the blue up arrow button next to the "Pioneers" track. The track replaces "Nice and Easy" as the first track in the list.

The blue down arrow button () allows the user to move a specific track lower in the playlist.For instance, to move the track "Pioneers" in Figure 03 to play last, click the blue down arrow button next to the "Pioneers" track **twice**. The track then replaces "The Chance" as the last track in the list.

Random Play

The **Enable Random Play** allows a music on hold playlist to be played in a random order. An example for using this setting is a caller continually calling into the same queue. This option keeps the music on hold from being repetitive, which can be a nuisance for callers.

NOTE:	When random play is enabled, administrators will no longer be able to set the order of particular tracks in a playlist.

Number Manager

Last Modified on 11/17/2017 11:38 am EST

Number Manager Overview

Last Modified on 05/25/2018 9:46 am EDT

The **Number Manager** is where all telephone numbers that are pointing to Kerauno must be built and provisioned. Any Telephone Number that needs to make inbound and outbound calls *must* be built in the **Number Manager**.

The **Number Manager** is located under the **System Admin > Number Manager** menu. When opening the **Number Manager**, administrators will be presented with a table of all currently provisioned telephone numbers in Kerauno. This table includes the telephone number itself, a short description, current start destination (set in **Call Routing**) as well as the trunk that the number is set to utilize.

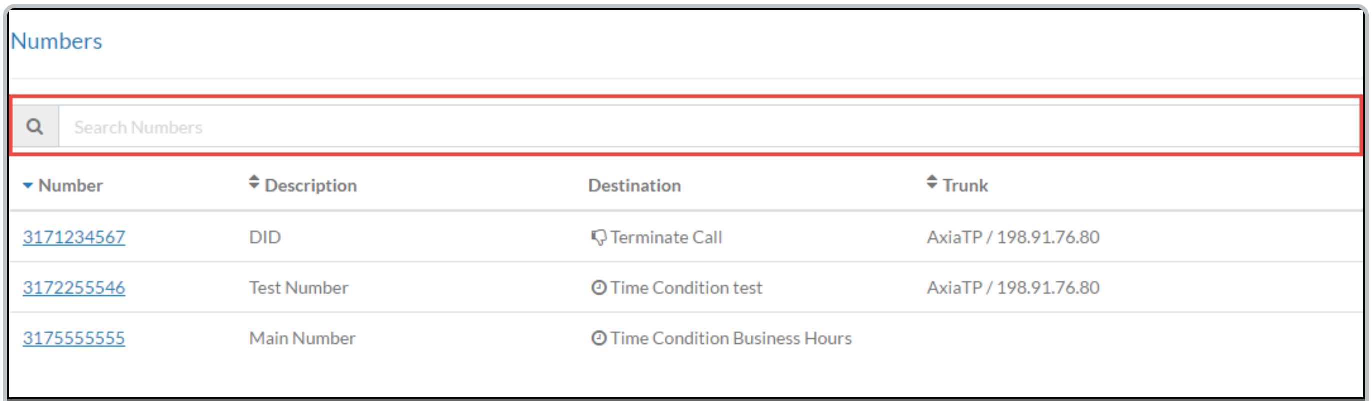


Figure 01: Number Manager

The fields in the table are sortable by **Number** or **Trunk** using the symbol next to the column header. System Administrators may also search for a particular number by utilizing the search bar at the top of the table.

Add New/Modify/Delete Existing Numbers

Last Modified on 05/25/2018 9:46 am EDT

The **Number Manager** is where all telephone numbers that are pointing to Kerauno must be built and provisioned. Any Telephone Number that needs to make inbound and outbound calls *must* be built in the **Number Manager**.

To add new numbers to the Kerauno system, navigate to the **Number Manager** modules under **System Admin -> Number Manager**. To add a new single number or large block of sequential numbers to Kerauno, press the green **Add Number** button on the far right side of the screen; to modify the trunk or configuration for an existing number, select the number from the yellow boxes under the **Number Manager** menu.

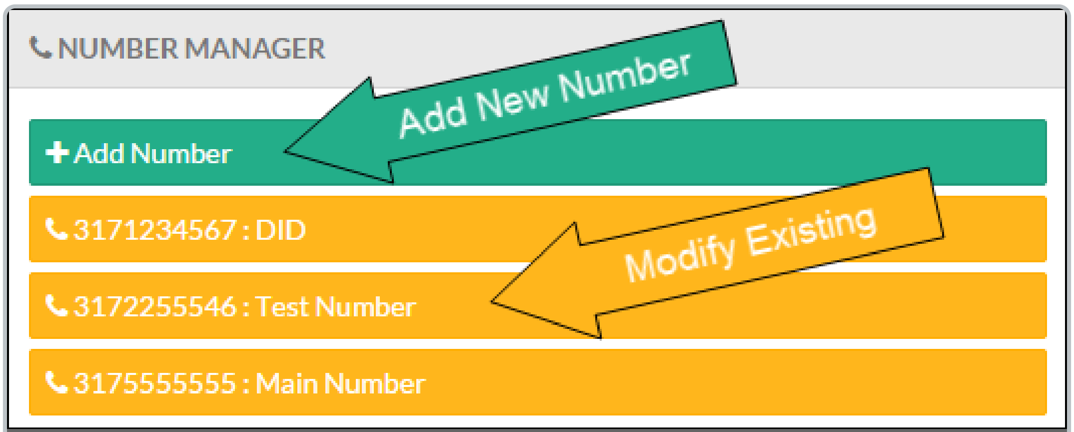


Figure 01: Number Manager Menu

After selecting a number to add or modify, the **Number Manager Addition** screen is displayed. In this screen administrators can assign the number to be added, add a description, and specify a desired trunk. The options on the **Number Manager Addition** page are displayed in Figure 02 below.

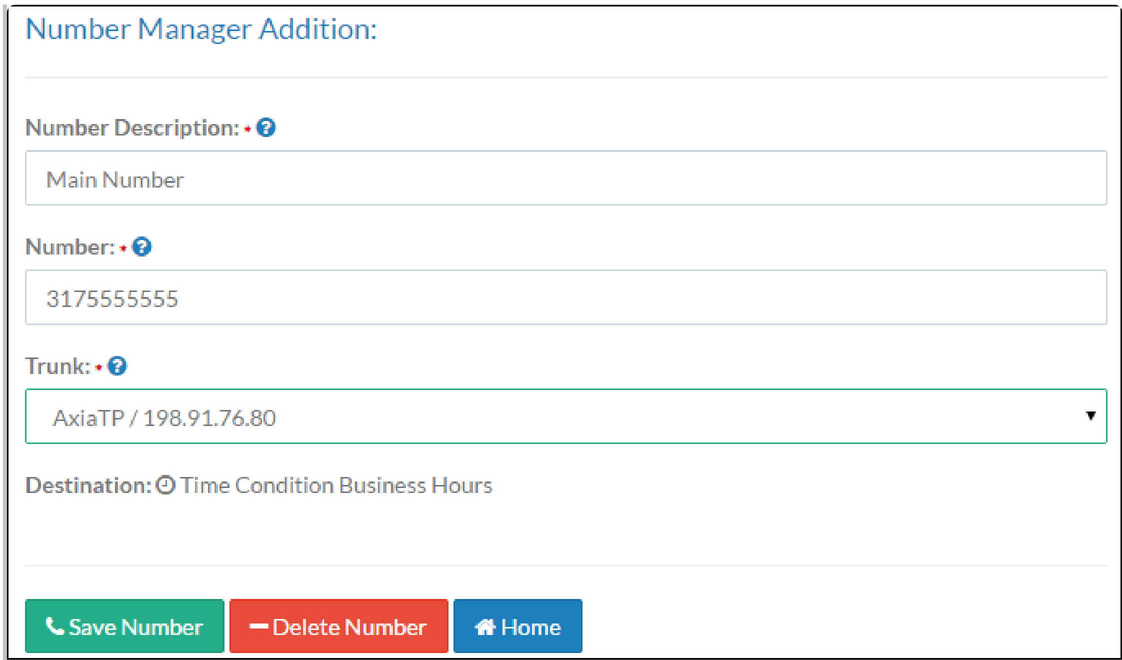


Figure 02: Number Manager Addition Screen

Number Description

In this field, enter a description of the phone number so that it may be easily identified. Example: **Main BTN Line** or **Toll-Free Sales Number,** etc.

Number

Enter the 10-digit telephone number to add to Kerauno for inbound and outbound calls. Do not use parenthesis, spaces, or dashes in the number.
Correct: 3175555555 **Incorrect:** 317-555-5555.

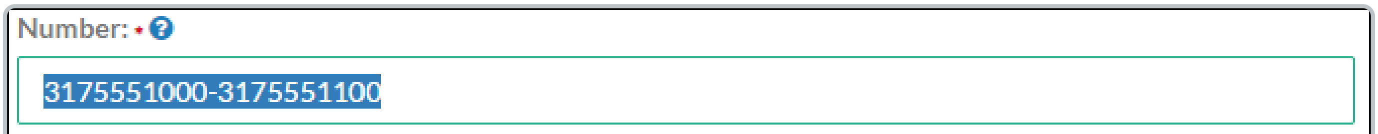


Figure 03: Number Manager - Entering Number

Also note that in this field, a large bulk block of numbers may be added. To do this, begin by typing two 10-digit numbers separated by a hyphen in the format startnumber-endnumber.

For example: Typing **3175552000-3175552100** into the **Number** field would create 100 consecutive entries in that particular range. (3175552000, 3175552001, etc.) All 100 numbers will be added as individual entries in the **Number Manager** after selecting the **Add XXX Numbers to Manager** button.

Trunk

Set the trunk that this number is assigned to for inbound traffic. This value must be set for reporting accuracy in the **Trunk Analytics** report. If it is set as "Unselected" calls to this number will function as normal, but there will be no record of which trunk the call used.

Destination

The **Destination** field shows where the number is currently routed to in the phone system. This information is created, managed, and modified from either the **Call Flow Tool** or the **Users > DID/CallerID Menu** (for Direct Dial Numbers). All newly added numbers will display a destination of "Terminate Call". Calls to newly built numbers will result in a terminated call until the number is set up either as a **User DID** or built into the **Call Flow Tool**. For more information on **Call Routing and Call Flow Tools**, please refer to [Call Routing](#) in this knowledge base.

When finished, select the **Save Number** (Existing) or **Add Number** (New) button at the bottom of the screen to save changes. Kerauno will then return to the **Number Manager Menu**.

Delete Existing Numbers

To delete a number from Kerauno, go the **Number Manager Menu** under **System Admin > Number Manager**. Click the number to be deleted from the menu on the right as shown in the Figure 04 below.

Figure 04: Number Manager - Delete Number

On the following screen, click the **–Delete Number** button at the bottom of the page to remove the number from Kerauno. The administrator will be presented with a confirmation that the number will be deleted. When prompted, press **OK** to confirm the deletion of the number. Kerauno will return to the **Number Manager Menu** and the number will be removed from the system.

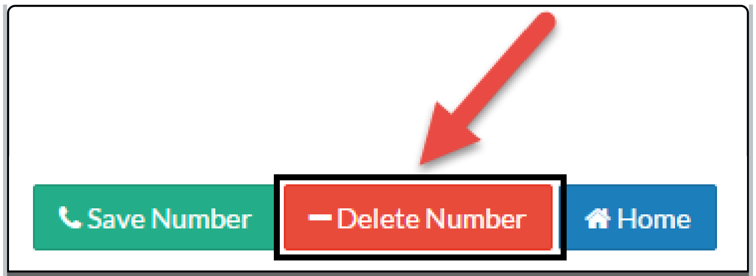


Figure 05: Number Manager - Delete Number Button

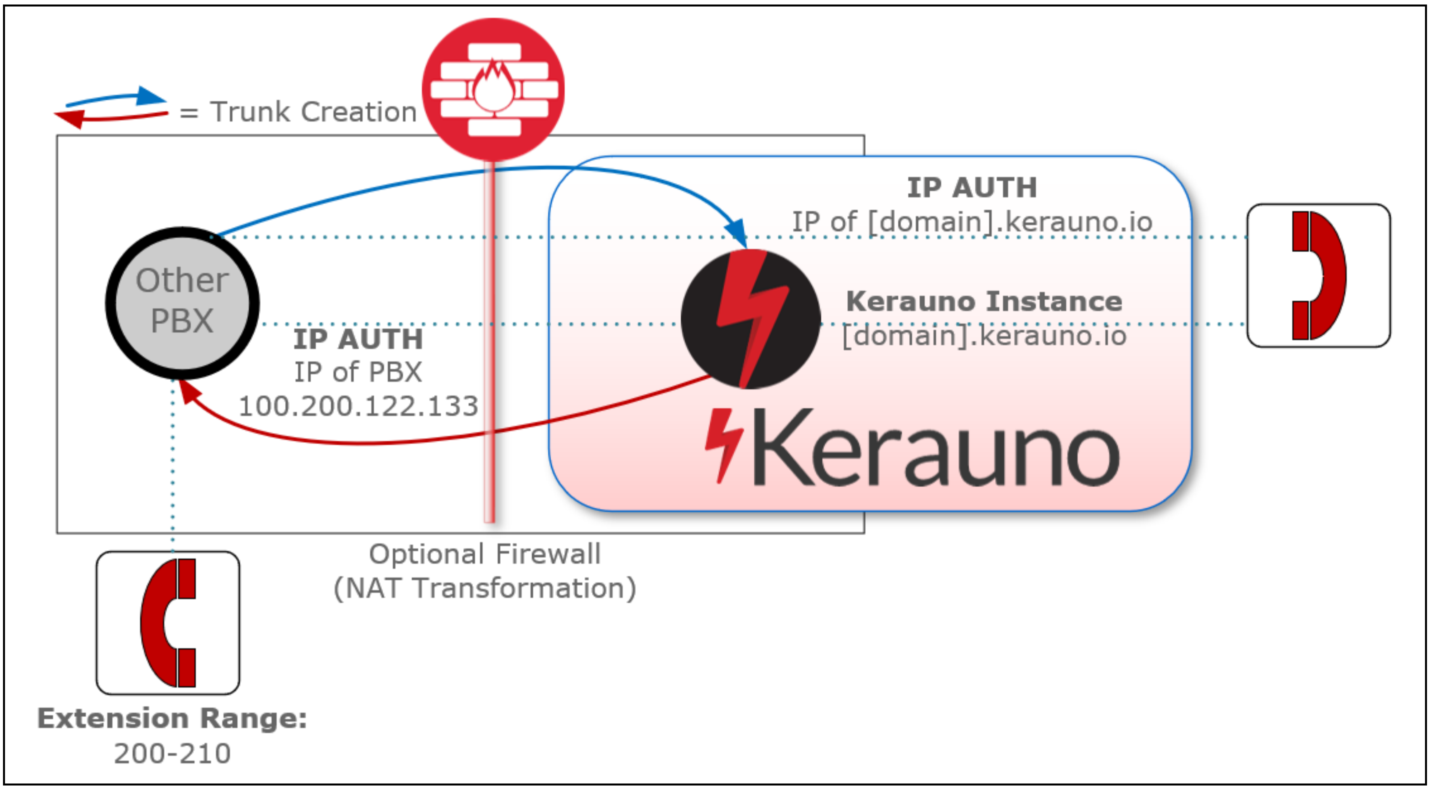
System Connector

Last Modified on 11/22/2019 11:26 am EST

Overview

From the main menu, navigate to **System Admin > System Connector**.

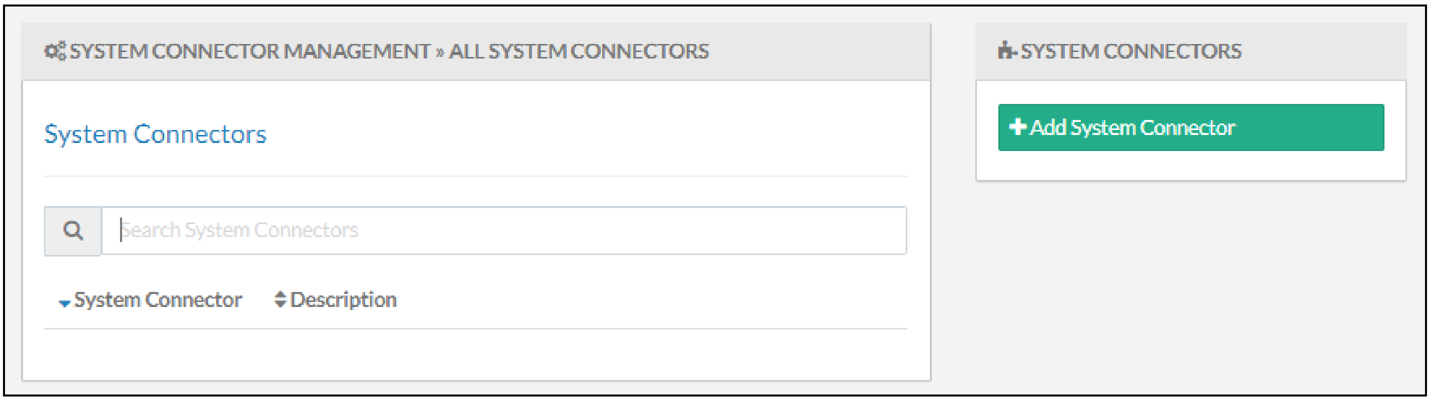
A System Connector allows administrators to create links between multiple Kerauno instances or other legacy IP solutions. This feature allows each integrated instance to operate independently but still act in unison. Changes or disruptions in one or more connected instances do not affect others, so that they are still accessible and able to make calls.



The System Connector works by building a 1:1 connection between systems that creates an internal SIP trunk between two servers, thus allowing extension to extension calls to users built on Kerauno via a System Connector.

Example: A business has two locations, each with their own Kerauno instance. Location **A** users can make direct extension calls to users at location **B** even though they are not using the same Kerauno instance.

Main Menu



Add System Connector

Click **+ Add System Connector** on the right side of the screen to create a new System Connector and populate the fields:

Name: Enter a name for the new System Connector. This value displays next to the System Connector on the **System Connector** menu and allows the connection to be easily identified.

Extension Range Min/Max: The values entered here are the minimum and maximum range of extensions of the system being connected to.

NOTE:	Extension ranges cannot overlap with the extension. range of the local system. If they do overlap, calls will always connect with a local extension. Example: The range for **System A** is ext. 100-150. Ranges for **System B** ext. 150 – 200. Calls from ext. 100 on **System A** to ext. 150 will always connect the caller to the extension 150 on **System A** and not **System B**.

System Connection Type: Select the appropriate connection type from the available drop-down menu. When a connection type includes a password, additional fields display.

Password Required

IP Address: This field is available for all connection types. In this field, enter the public IP address of the system that is being connected to.

Username/Password: Create a secure username and password for the 1:1 connection between systems. Username and password entered here must match on the remote system. If connecting Kerauno to a different IP phone system, set up a new SIP trunk utilizing the username and password that was entered on Kerauno.

Register String: Create a registration string to pass to the remote system. The values must match between the local and remote system. Recommended length of a registration string is between 20-30 characters. Other fields can be used to build the string to remain consistent.

Use the following format:

{username}@{instance hostname or IP Address}:{Password}

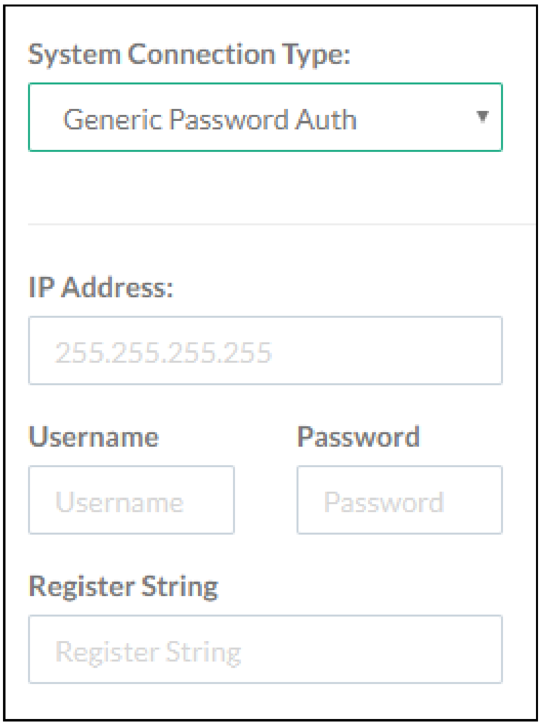
Example:

Username: 321231

Password: PAssW07D

IP Address: 14.23.32.41 or xyzcorp.kerauno.io

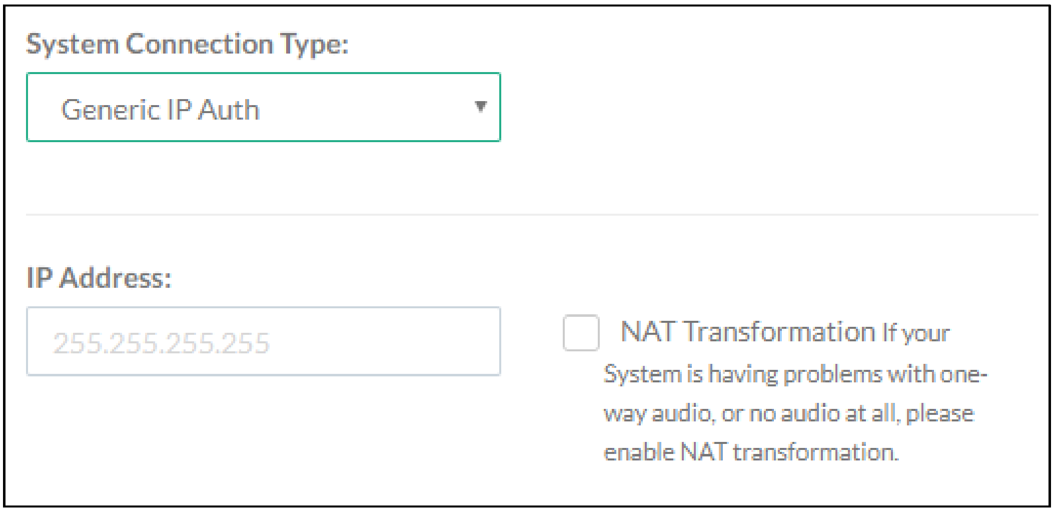
321231@xyzcorp.kerauno.io:PAssW07D



No Password Required

IP Address: This field is available for all connection types. End the full hostname or the public IP address (if necessary) of the system that is being connected to.

NAT Transformation: This checkbox enables and disables NAT transformation. NAT transformation modifies the way the system resolves IP addresses. If you experience problems with one-way audio, or no audio at all, attempt to enable NAT transformation.



When all fields have been completed, select the **Add System Connector** button to save settings and generate the new connection.

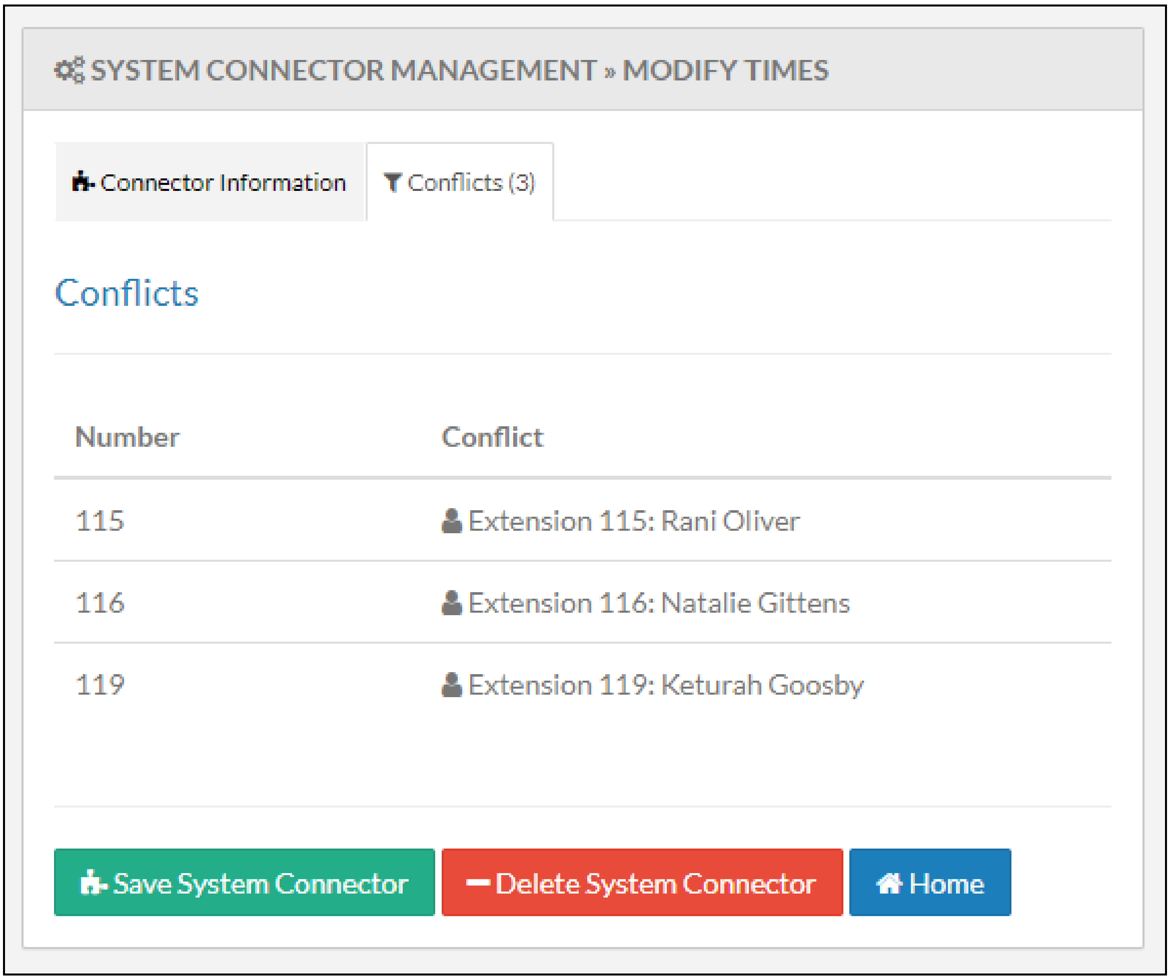
Manage System Connectors

System Connections can be edited or deleted. Click the hyperlinked System Connector from the main menu to edit or delete.

Conflicts

View predicted extension conflicts with the local Kerauno instance from the **Conflicts** tab within the System Connector. Conflicts occur when numbers are tied to a Call Flow, Parking Lot, or Speed Dial and must be adjusted to either Local or Remote.

Resolve conflicts by using a different extension; either Kerauno or other system. If you are unable to resolve the conflict between two connected Kerauno instances or other legacy system, choose which one takes precedence via the Migration Kit.


SYSTEM CONNECTOR MANAGEMENT » MODIFY TIMES
Connector Information
Conflicts (3)
Conflicts
Number
Conflict
115
Extension 115: Rani Oliver
116
Extension 116: Natalie Gittens
119
Extension 119: Keturah Goosby
Save System Connector
Delete System Connector
Home

System Recordings (Announcements)

Last Modified on 04/24/2019 11:35 am EDT

An announcement is simply an information message that will play to a caller. To record a new announcement using an extension registered to Kerauno, navigate to the **System Recordings** menu under **System Admin** and press the **Record Platform Announcement/TTS** button.

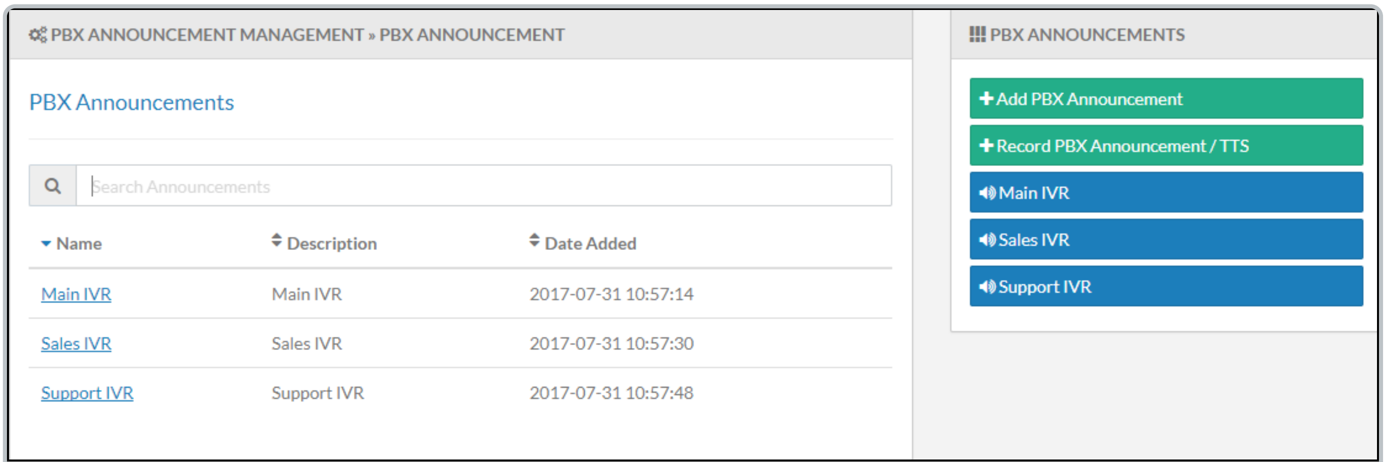


Figure 01: Announcements Menu

NOTE:	When recording or uploading a new announcement, the recording will need to be assigned to an IVR, Ring Group, or Announcement object within the **Call Flow Tool**. If a recording is not assigned, the announcement will not be played to callers. Please refer to the Call Flow Tool knowledge base article.

Record From Extension

When the **New Platform Announcement** pop-up is displayed, press **Record From Extension** to record a new announcement.

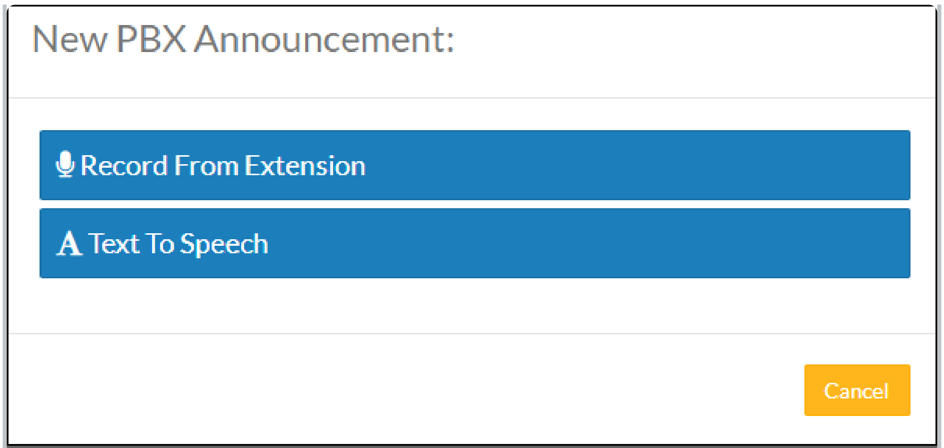


Figure 02: New Platform Announcement Pop-Up

The **New Platform Announcement** selection pop-up is displayed; click the drop-down box and select the extension that the recording will be generated from.

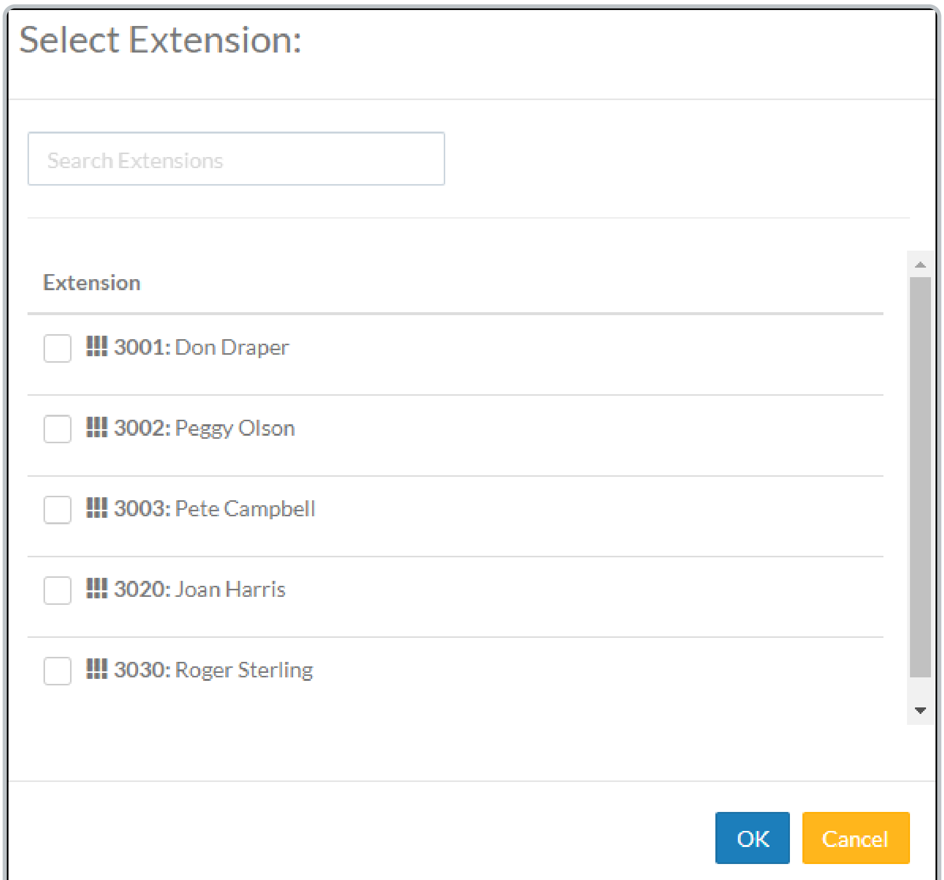


Figure 03: New Platform Announcement Selection Pop-Up

Once an extension is selected the pop-up box will update. Enter a name in the **Name your recording** field and a brief description in the **Describe your recording** field. The name and description values is how the announcement is displayed and identified within Kerauno. Press the **Add Recording** button to create the new announcement.

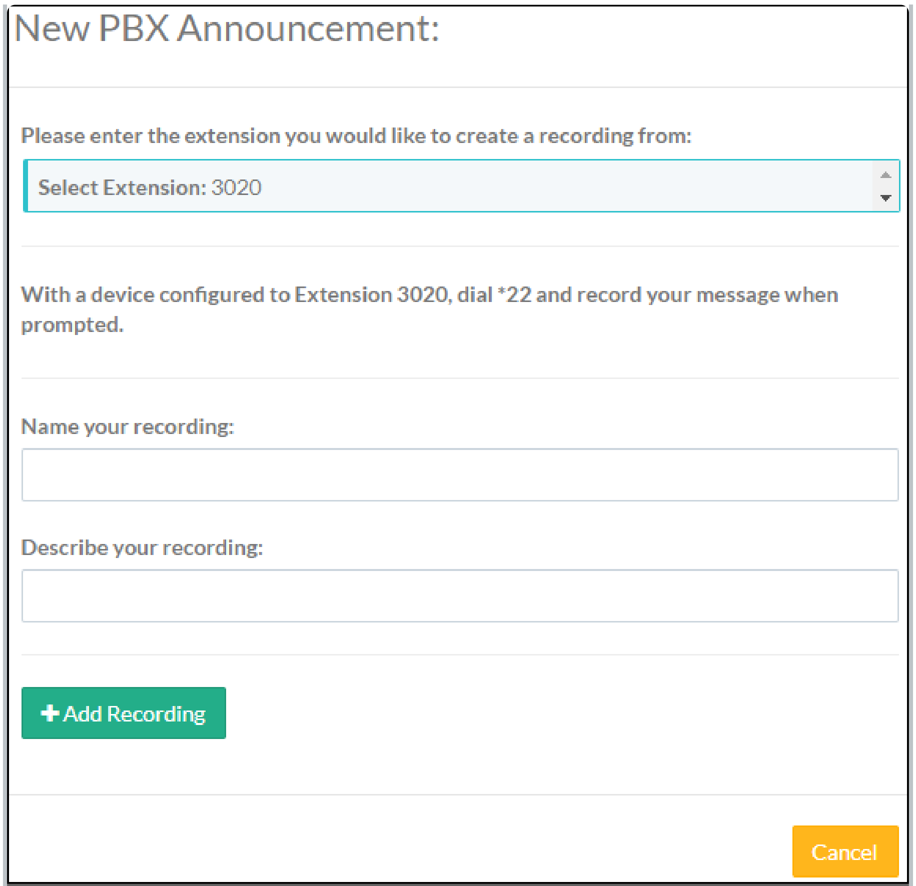


Figure 04: New Platform Announcement Pop-up-Box with Extension

With a device registered to the chosen extension, dial ***22**. Immediately after dialing, a tone will play that indicates the message has begun recording. Speak the desired message into the phone handset then press **#** to end the recording. After the recording has been completed, you may press **1** to listen to your recording or ***** to re-record the announcement.

When satisfied with the recording of the announcement, hang up the call. As soon as the call is terminated, a sound file with the recorded audio will be generated and sent to Kerauno.

Text to Speech

When the **New Platform Announcement** pop-up is displayed, press the **Text To Speech** button to display the **New Platform Announcement** text-to-speech pop-up.

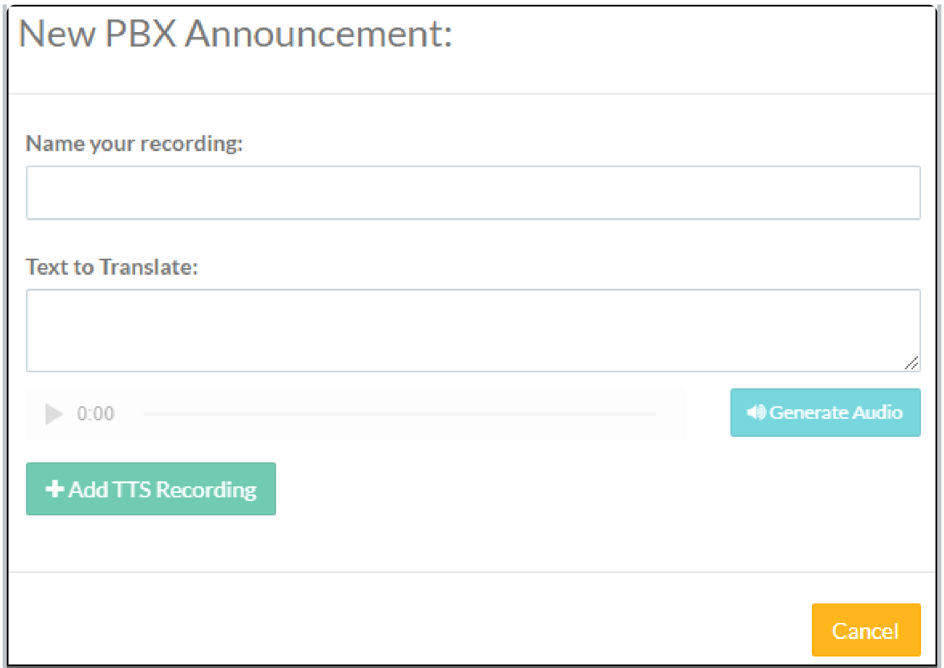


Figure 04: New Platform Announcement - Text to Speech

Enter a recording name in the **Name your recording** field. In the **Text to Translate** field enter the announcement text. Press the **Generate Audio** button to create an audio of the message. Press the **Add TTS Recording** button to create/save the message.

Trunks

Last Modified on 05/25/2018 9:39 am EDT

The **Trunks** menu displays all information about the trunks configured for use with Kerauno. This list displays trunks currently being used as well as information about each specific trunk.

On this menu, the names of any trunks connected to Kerauno are listed, as well as the trunk type. The originating IP Address of the trunk as well as its current status (reachable or unreachable) is also shown.

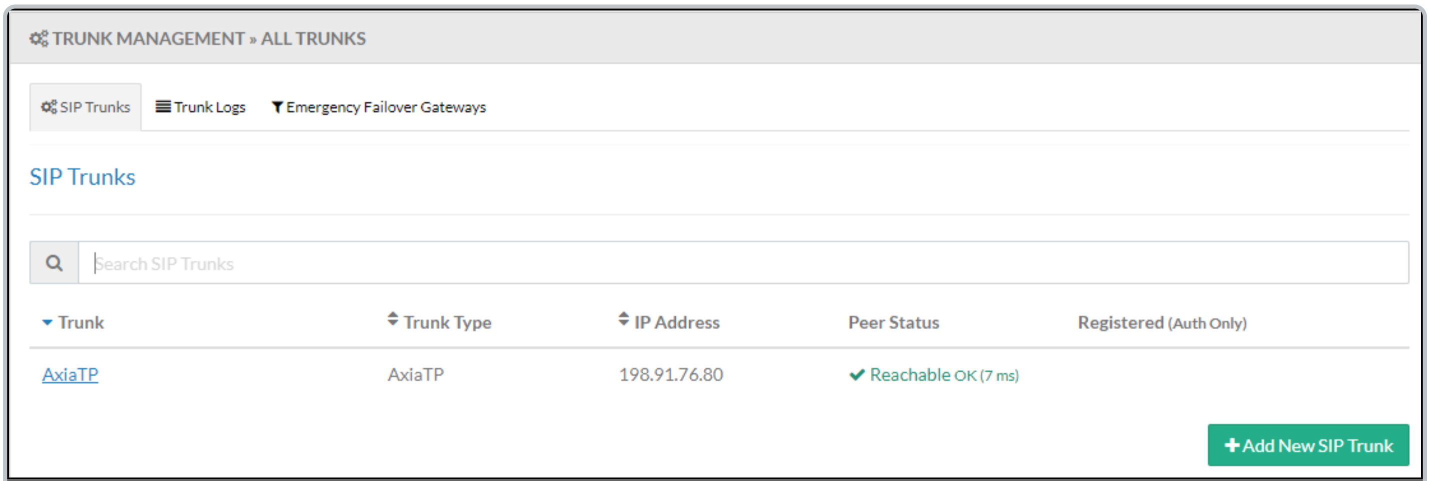


Figure 01: Trunks Menu

Configuring a New SIP Trunk

To configure a new SIP Trunk to work with Kerauno, first select the **+Add New SIP Trunk** button on the bottom-right hand side of the **Trunk** menu.

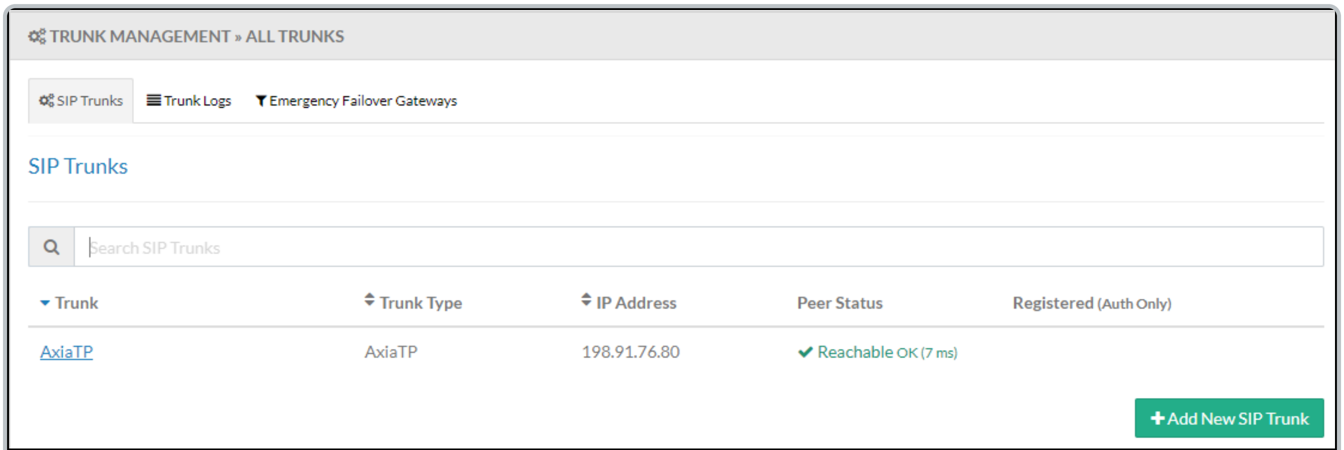


Figure 01: Trunk Menu

The Trunk Management - Add New SIP Trunk screen is displayed. Click the drop-down to display a list of SIP trunk types. Select the type of SIP trunk to add to the system.

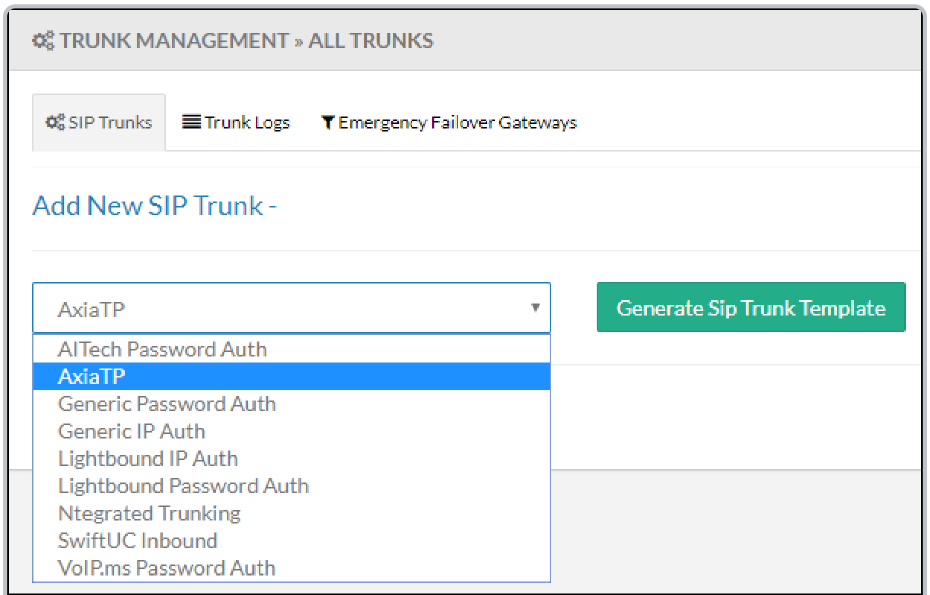


Figure 02: Trunk Management - Add New SIP Trunk

There are currently two types of SIP trunk templates (Password and IP Authentication), as well as a number of additional templates that are specific to specific SIP service providers. If attempting to use a provider not included in the drop-down menu, select the **Generic Password Auth** or **Generic IP Auth** options.

After selecting either a Generic or Provider-Specific option, press the **Generate SIP Trunk Template** button.

NOTE:	If a Generic Password or IP Auth trunk is configured but still unreachable, please contact your AxiaTP Implementation Specialist or Project Manager. Some SIP providers have very specific requirements for trunk configurations such as specific codecs or dial plans. These options must be configured by an AxiaTP engineer.

On the next Add New SIP Trunk screen, details may be entered to properly configure the SIP Trunk.

NOTE:	Fields may or may not be included depending on which trunk type has been selected (IP Auth, Password Auth, or Provider Specific).

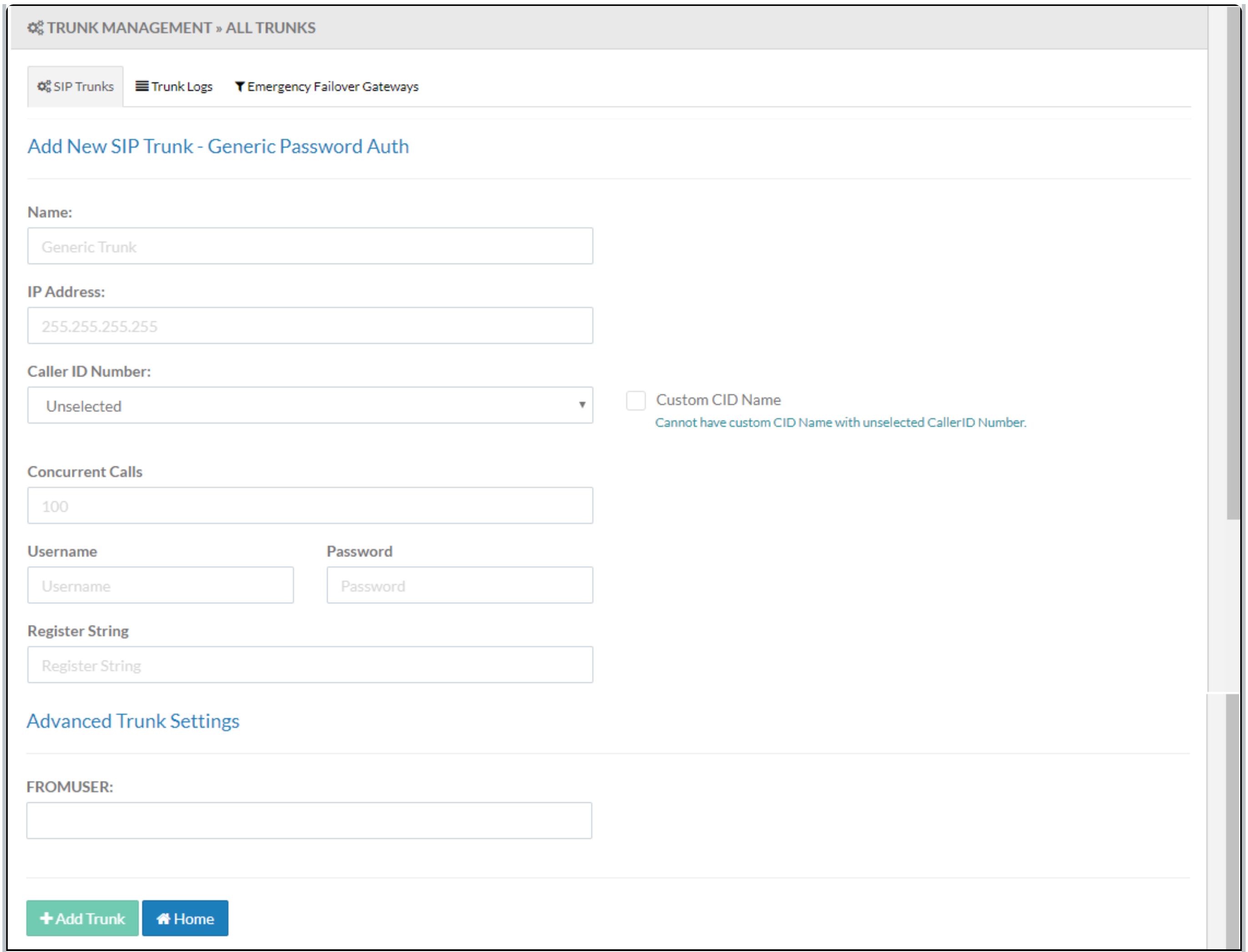


Figure 03: SIP Trunk Configuration Form

Fields and Descriptions include:

Name: The name for the trunk being built. The value entered will show next to the trunk on the **Status** page so that the trunk may be easily identified.

IP Address: The source IP address of the SIP trunk that is being used. This value will not show if a specific provider was selected, as the IP address is already been included in the trunk template.

Caller ID: The Caller ID to use for this trunk. This value will be set as the **Trunk Default** caller ID. If no specific caller id has been set for an Extension or Dial Plan, the value entered here will be used.

Custom CID:

Concurrent Calls: Concurrent call limit set for the particular trunk. Any additional calls above this limit will receive a busy signal.

NOTE:	Concurrent Call limits may also be set by your SIP trunk provider. Please check with you SIP vendor to determine the maximum amount of calls that can be active at the same time.

The following three fields are available for **Password Auth** trunks.

Username: Enter the SIP username. This is typically the primary telephone number on file with your SIP provider.

Password: Enter the SIP password associated with your SIP trunk. This information can be obtained from the SIP trunking provider.

Register String: Enter a registration string to pass to the SIP trunk. This information can be obtained from the SIP trunking provider.

Once all information has been entered, press the **Add Trunk** button. Kerauno will register and configure the trunk and return to the main **SIP Trunks** screen. If the trunk displays as **Reachable**, it has been added successfully.

Voicemail Blasting

Last Modified on 08/16/2019 2:32 pm EDT

The **Voicemail Blasting** feature allows administrators to broadcast voicemail messages to large groups of users all at one time. Coupled with the **Voicemail to Email** feature, voicemail broadcasting can be a quick, easy, and powerful way to get a voice message communicated to many different users.

To send a voicemail blast, navigate to the **System Admin > Voicemail Blasting** menu.

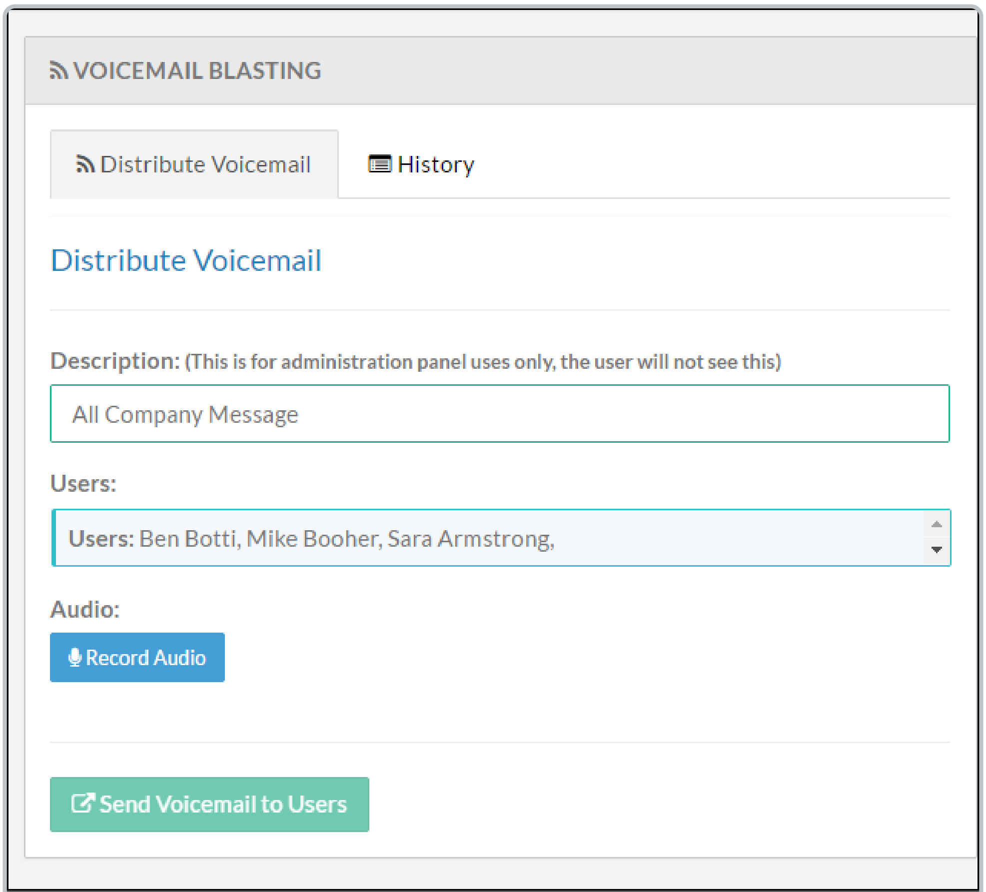


Figure 01: Voicemail Blast Menu

There are three (3) fields are listed on this screen:

Description: Enter an easily identifiable name for the voicemail blast in this field,. This name will not be included in the voicemail and is only used to identify the message.

Users: Clicking the **Users** box displays a pop-up which allows the administrator to select which users the voicemail blast should be sent to. Select the appropriate users by selecting the check-boxes to the left. When completed, select **OK**.

Audio: The **Record Audio** button allows the administrator to record the message that is to be sent to the selected users. When the **Record Audio** button is pressed, a list of available extensions and mobile numbers is displayed for the Admin to select as a recording source.

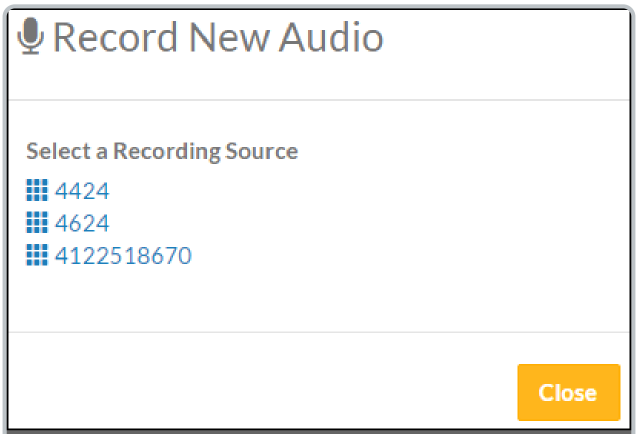


Figure 02: Record New Audio - Select Recording Source

To record a message, select one of the extensions or mobile numbers shown in the pop-up box. When ready, click the blue **Record Audio** button to send a call to the recorded device. Pick up the call and follow the prompts.

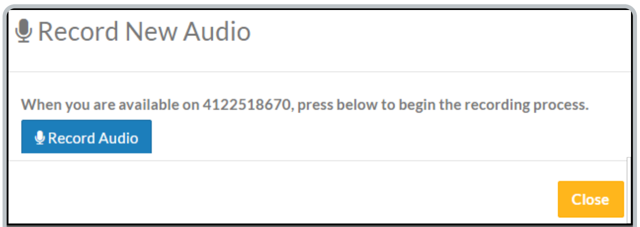


Figure 03: Record New Audio - Record Audio Button

After a recording is completed press:

1 - listen to the recording

2 - save the recording

* - re-record the message.

When satisfied, click the green **Ready To Save** button to save the recording. Kerauno will return to the main **Voicemail Blasting** menu. The new recording will now appear in the embedded media player as shown in Figure 04 below.

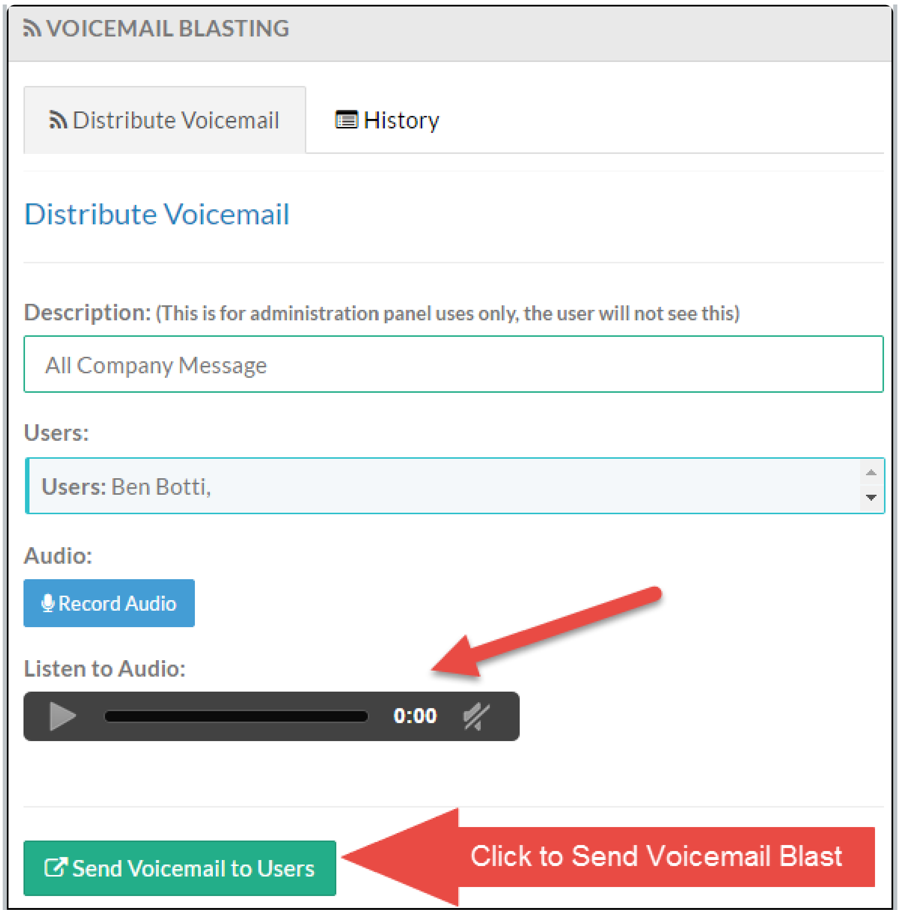


Figure 04: Voicemail Blasting - Distribute Voicemail Screen

When all fields have been completed and the new recording has been uploaded, click the **Send Voicemail to Users** button to initiate the voicemail blast. All users specified in the **Users** field will receive the recorded message in their voicemail boxes.

There is an additional tab under **Voicemail Blasting** that allows administrators to view the history of messages sent. To access this menu, click the **History tab** as shown in Figure 05 below.

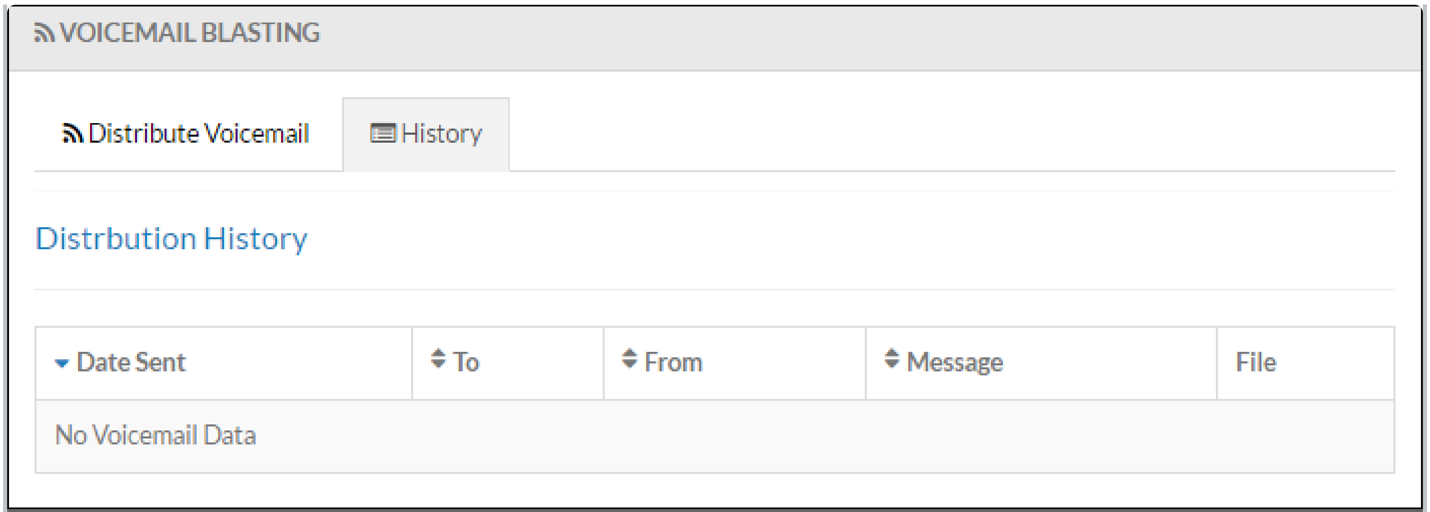


Figure 05: Voicemail Blasting - Distribution History Tab

A **Distribution History** table is displayed which includes date sent, to/from, and name, as well as the voicemail file sent.

Minimum requirements for Kerauno Desktop App

Last Modified on 03/25/2019 10:39 am EDT

The following is the minimum requirements for running the Kerauno Desktop app, including the use of Presence.

Supported Desktop Operating Systems:

- Windows 7/10
- MAC OS version 10.11, 10.12, 10.13, 10.14

Supported Browsers:

- Chrome (version 64 or later)
- Firefox (version 24 and later)
- Safari (version 7 or later)
- Microsoft Edge (Enterprise Mode)
- Internet Explorer 11

Desktop Application Requirements:

- 4GB of RAM

Please contact support@keraunouc.com with any questions.

Chat+ System Settings

Last Modified on 05/30/2018 8:44 am EDT

The system administrator can easily control the settings for Chat+, such as who can create public channels, who can create private channels, etc.

To adjust system settings for Chat+, select **System Settings > Advanced Settings** from the menu at the left of the screen then select the **Chat+** tab.

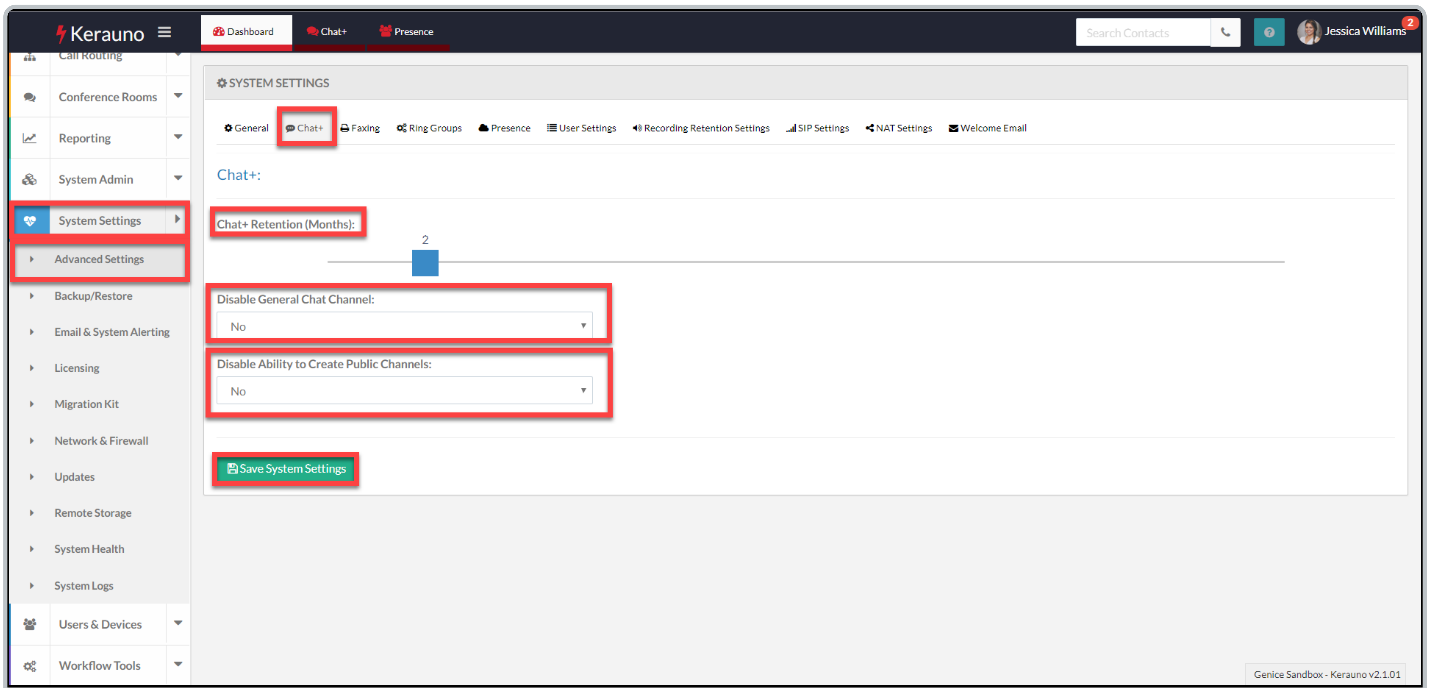


Figure 01 System Settings > Chat+

Click and drag the slider bar under **Chat+ Retention (Months)** to set the length of time in months that Chat+ messages are retained.

Under the **Disable General Chat Channel** option, select **Yes** from the drop-down to disable this funtionality; select **No** to leave the option available.

Under the **Disable Ability to Create Public Channels** option, select **Yes** from the drop-down to disable this functionality; select **No** to leave the optoin available.

Select the **Save System Settings** button to save your changes.

Modify New User Welcome Email

Last Modified on 05/24/2018 4:42 pm EDT

The New User Welcome Email function automatically sends an email to new users informing them of their access. This email can be easily modified to better reflect individual company identity.

To customize the welcome email, select **System Settings > Advanced Settings** from the menu at the left of the screen then select the **Welcome Email** tab.

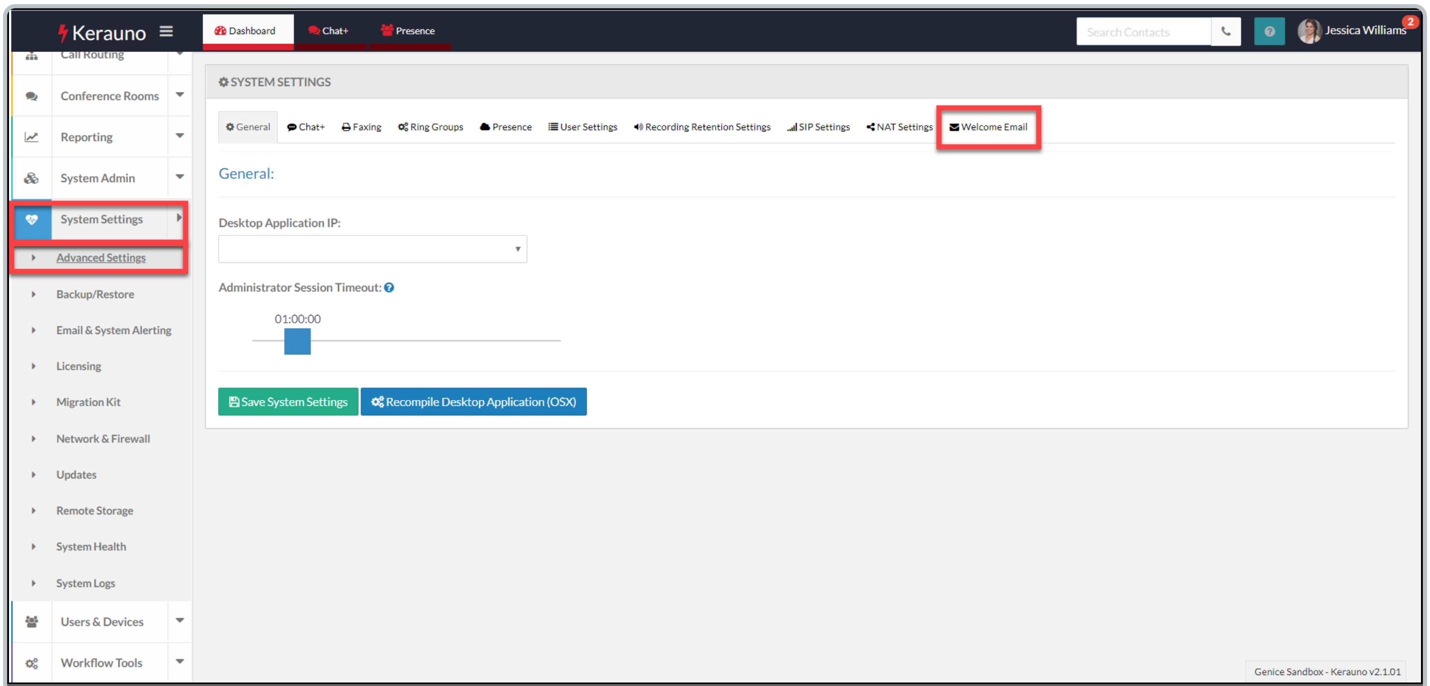


Figure 01 Advanced Settings Screen

Select the **Welcome Email** tab to make updates to the Welcome Email.

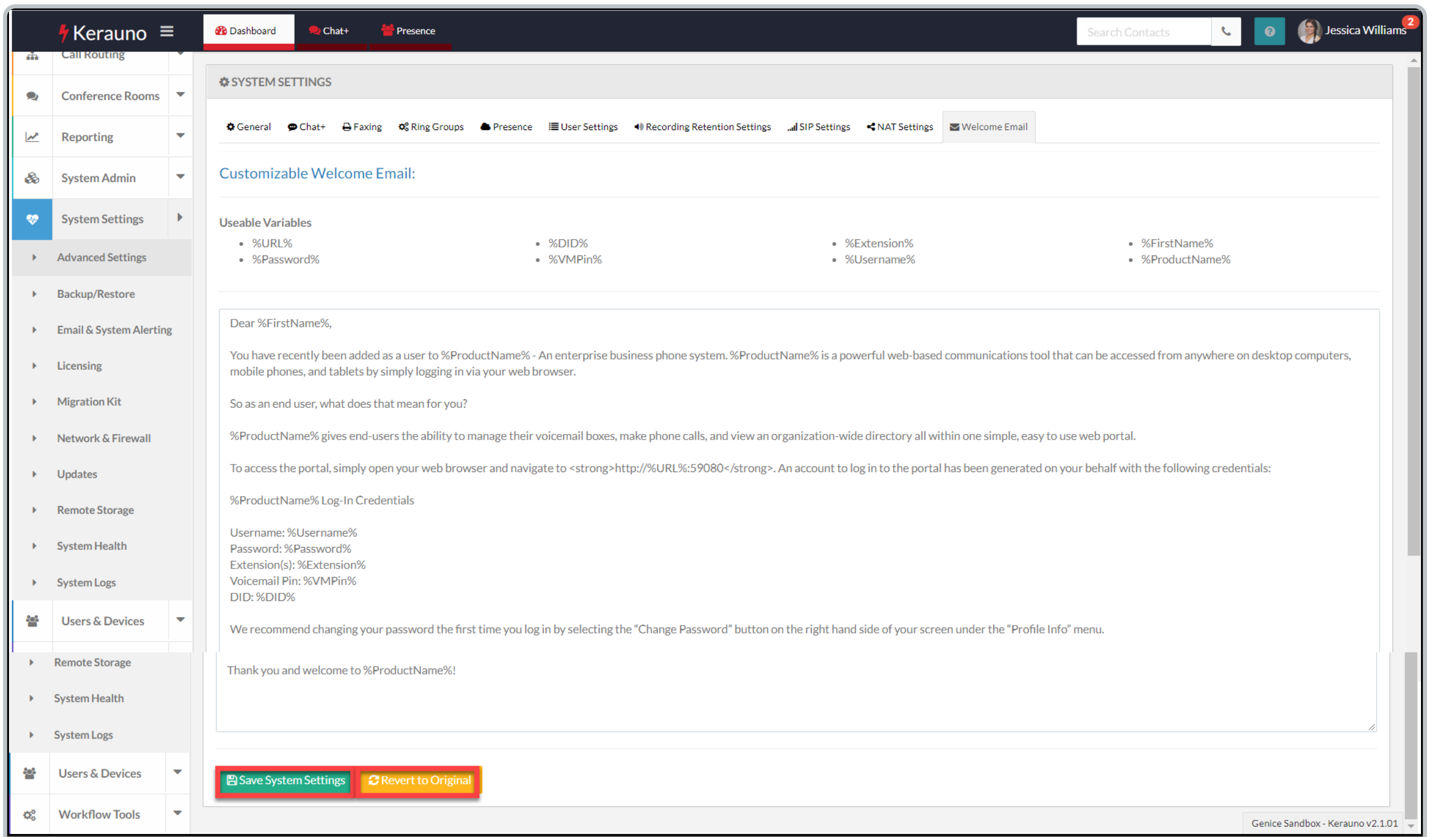


Figure 02 Welcome Email Screen

Make any necessary updates then select the **Save System Settings** button to save your changes. You can also select the **Revert to Original** button at any time to revert the Welcome Email back to the original text.

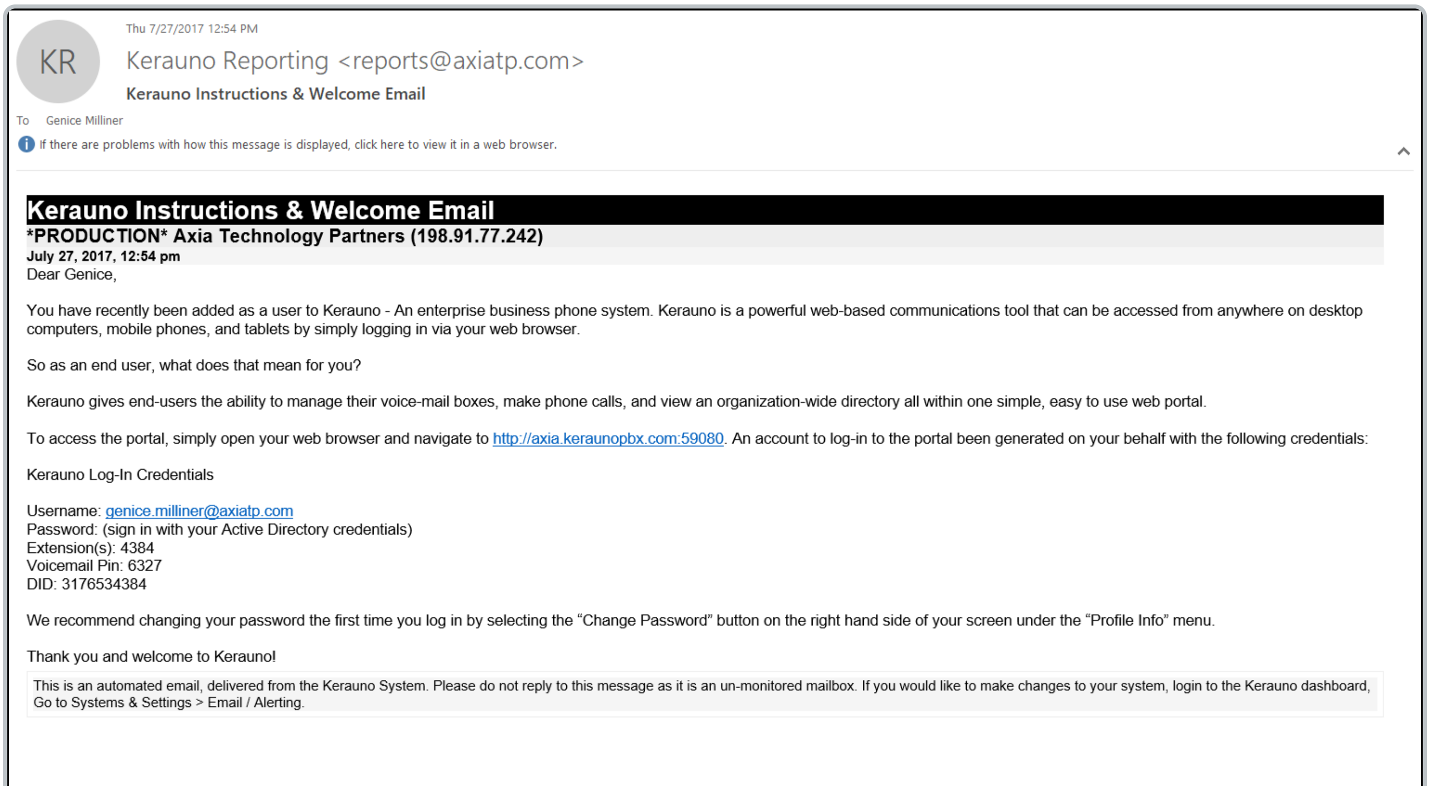


Figure 03 Example New User Email

Backup/Restore General

Last Modified on 04/11/2019 3:13 pm EDT

The **Backup and Restore** menus contain all relevant options for data backups of call detail records, voicemail messages, and configuration settings. In Kerauno, backups are a full image of the existing data on the server hard drive, meaning all settings, call detail records, configuration settings, extension data, and voicemails are saved to the generated system backups. The only thing not included in a system backup are call recording files. Call recording backups are detailed in the **Remote Storage** menu.

File Format/Syntax

All backup files are generated in tar.gz format. The file naming syntax is: **kerauno-backup-############01-version#.#.##.tar.gz.en** where ### is the year, month, and time of backup.

Example: **kerauno-backup-20181001030001-version2.2.02.tar.gz.en** would be **Oct 01, 2018 at 03:00**.

Run At

The **Run at:** menu determines at what time Kerauno will generate a new back-up file. Administrators may select a particular hour by clicking and dragging the blue slider bar to the appropriate time. The backups generated will be stored locally on the server and may also be sent to a remote destination if one is set in the **Remote Destination** menu. When done, be sure to click the **Save Backup** button to ensure that the changes made are saved.

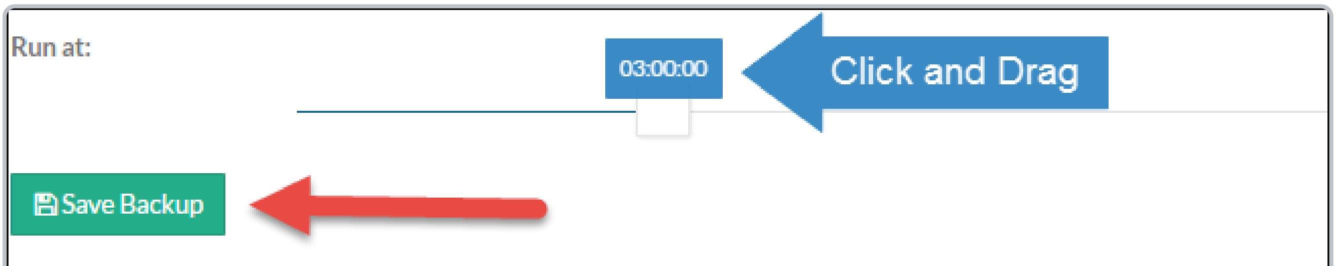


Figure 01: Run At Menu

Backup on Demand

From the **Backup/Restore > Actions** tab, select the **Run Backup Now** button to create an "on-demand" backup.

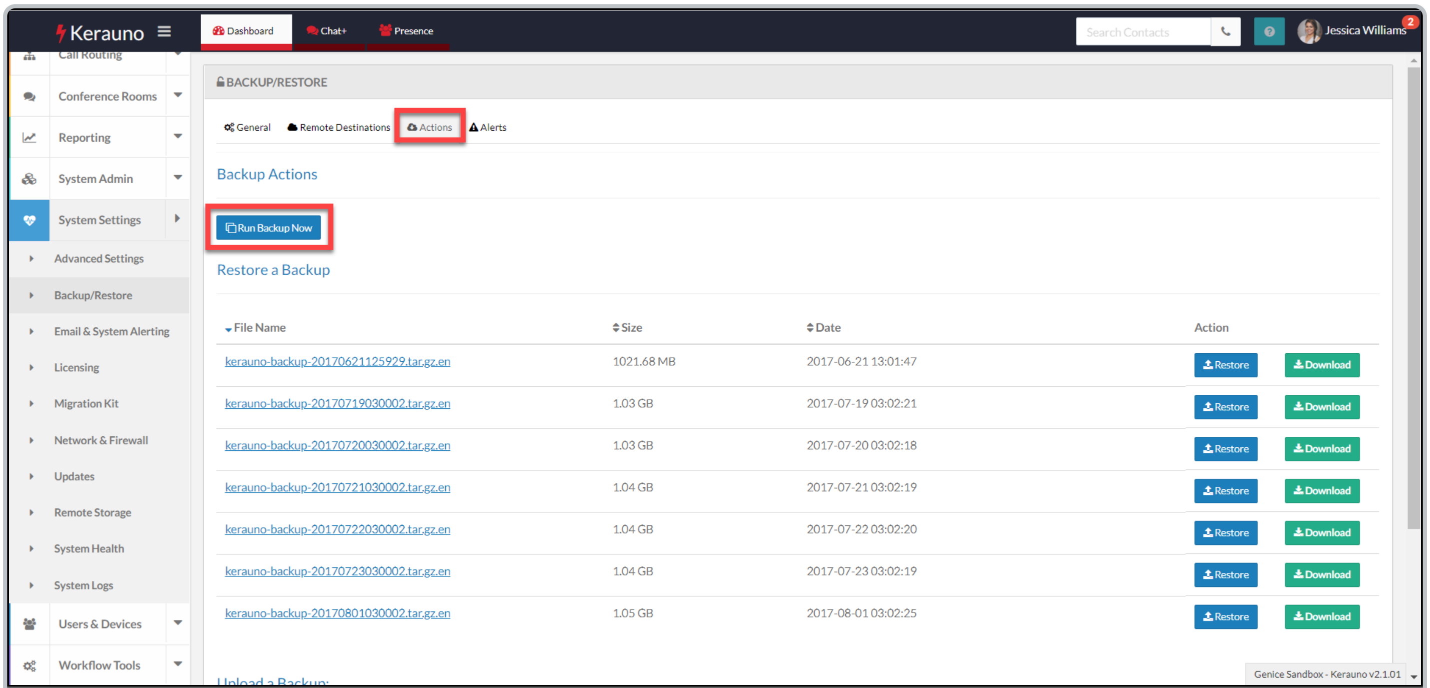


Figure 02 Backup/Restore > Actions Tab

Local Backup Status

The **Local Backup Status** screen shows the status of the most recently run backup on the server. A backup shows as either “Complete” or “Incomplete” (Failed) in the table.

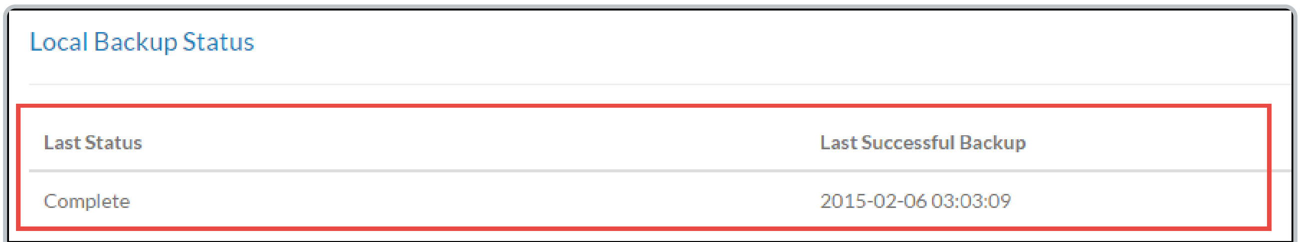


Figure 03: Local Backup Status Screen

The **Local Status** menu also shows the date and time of the last successful backup. The time listed here shows the time the backup process was completed after compiling the backup, compressing to tar.gz.en format, and then writing the backup to the local server’s hard drive.

Existing Local Backups

The **Existing Local Backups** screen shows the details of the last seven (7) successful backups generated over the previous seven (7) days. This information includes the file name, file size, and date/time that the backup was completed. Clicking a light-blue file name allows the System Administrator to download the back-up file from the server. Kerauno will only hold seven (7) back-ups locally, and will overwrite the oldest file when a new backup is created. If the System Administrator would like access to more than the seven (7) backups listed, they must set remote destination as detailed in the Remote Destinations article in this knowledge base.

Remote Destinations

Last Modified on 11/22/2019 1:25 pm EST

A remote destination allows the System Administrator to push backups from the Kerauno server to another location, such as a dedicated backup server, remote hard drive, or cloud storage service. **Remote Destinations** allow the System Administrator to retain more than the seven daily backups stored locally. If a remote destination is configured, backups will be sent via FTP to the configured destination at the time set in the **Run At:** field on the **Backup Settings** menu. Backups will always save locally first, before being sent via FTP to the configured remote destination.

Add New Remote Destination

To add a new remote destination, select the **Remote Destinations** tab under the **Backup/Restore** menu and select the **+Add New Remote Destination** button.

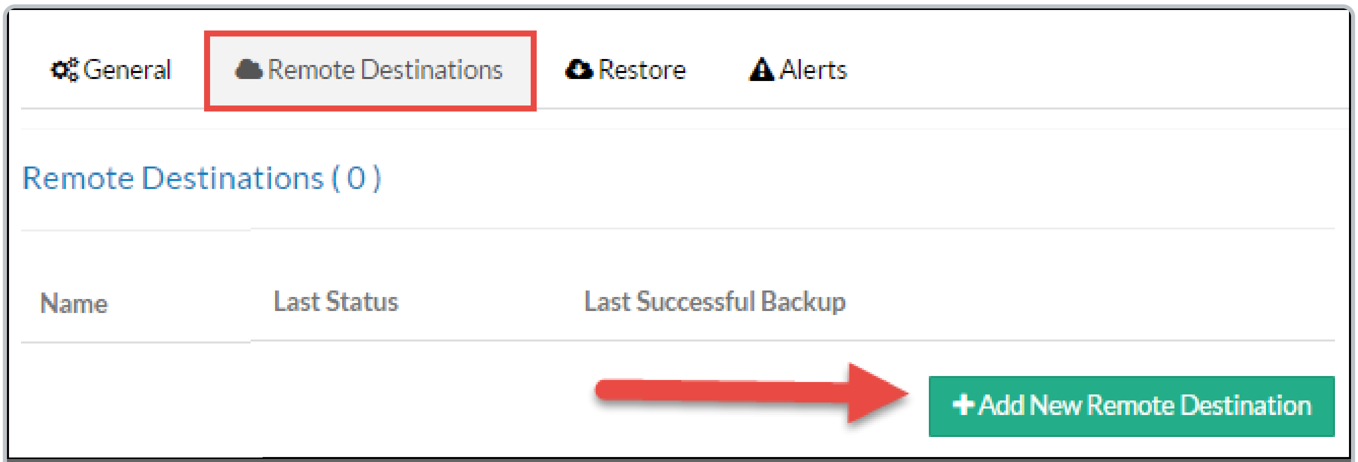
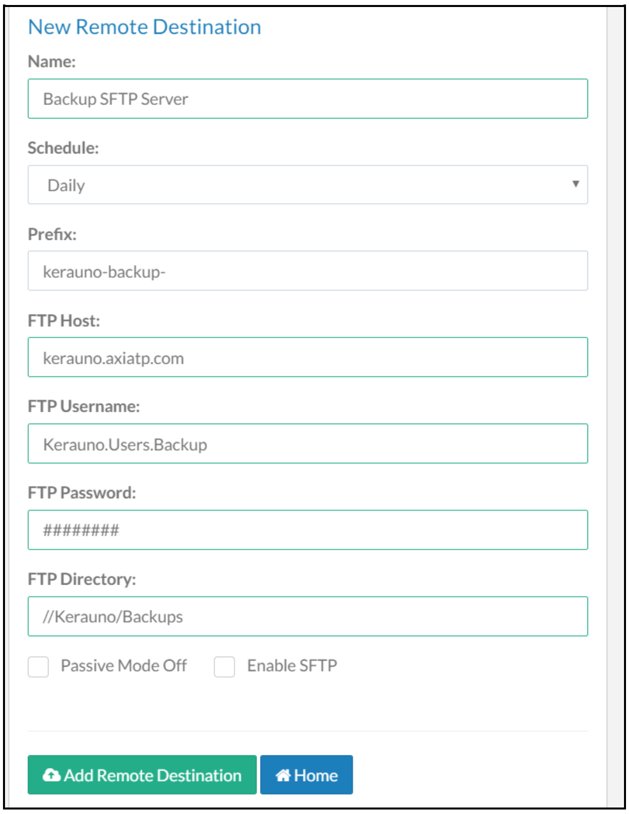


Figure 04: Remote Destinations Screen - Add New Remote Destination

Kerauno will then display the **New Remote Destination** screen, which will allow the administrator to configure the FTP details of the remote destination. The fields on this menu include:

Name: In this field, enter an easily recognizable name for this remote destination (**Ex.** Backup Server).

Schedule: This field determines when backups are sent to the remote destination (Daily, Weekly, or Monthly). Kerauno sends the most current backup file to the remote destination at the backup-time specified.



Prefix: The file name prefix listed here is added to the file name when sent to the remote destination. (Ex. kerauno-backup-201410140300.tar.gz.)

FTP Host: The DNS name or IP address of the server to set as a remote destination (Ex- ftp.mydomain.com).

FTP Username: The FTP username needed to connect to the FTP host.

FTP Password: The FTP password that is associated with the FTP username entered.

FTP Directory: The directory or sub-directory backup files should be saved to (Ex. /Kerauno/Backups).

Passive Mode Off: Click this checkbox to...

Enable SFTP: Click this checkbox to enable Secure Fire Transfer Protocol (SFTP).

When finished modifying and configuring the FTP details of the remote destination, be sure to select the **+ Add Remote Destination** button again to ensure that the changes are saved to Kerauno.

Delete a Remote Location

On the **Remote Destinations** tab, click an existing remote destination's name to select it. Kerauno will then open the **Remote Destination Configuration** screen. Select the **Delete Remote Destination** button at the bottom of the page to remove the remote destination.

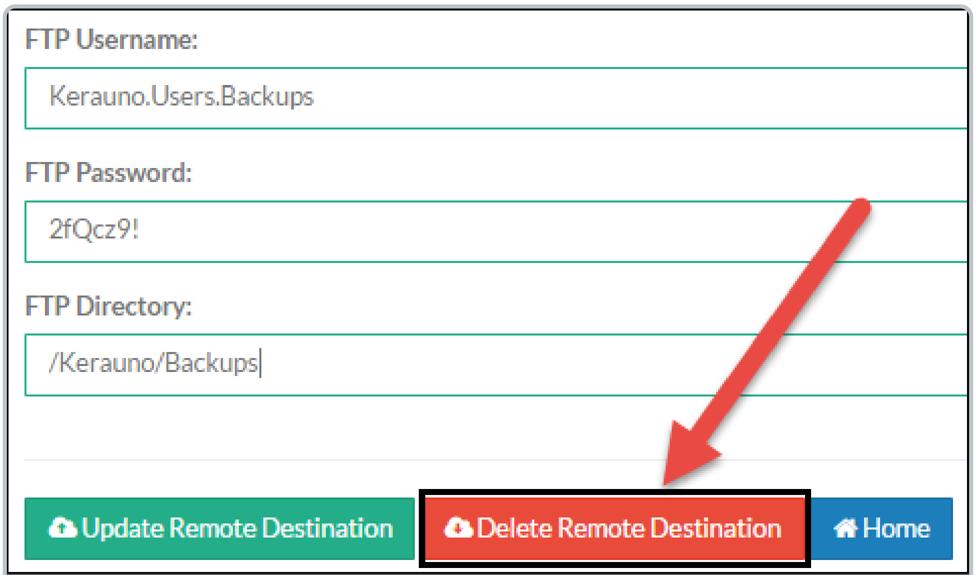


Figure 06: Remote Destination Configuration Screen - Delete Remote Destination Button

A confirmation that the destination will be deleted is displayed. Press **OK** and Kerauno will return to the main menu after the remote destination has been removed.

Actions

Last Modified on 11/22/2019 1:26 pm EST

The **Restore** menu allows administrators to restore Kerauno to a previous state from a backup file. Administrators may restore using a backup file that is on the local hard drive of the Kerauno server, or they may upload a new tar.gz file pulled from a remote destination.

Restore from a Local Backup

On the **Restore** tab, select the **Restore** button next to the backup that you would like to restore as shown in the figure below. Take particular note of the **Date** field, to ensure that the desired backup is chosen. Administrators may choose any of the local back-ups from the last seven days to restore from.

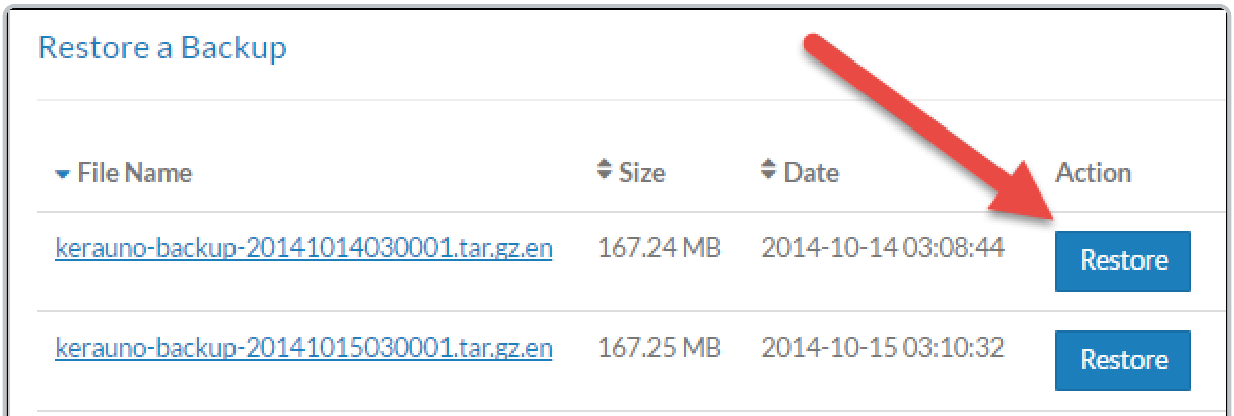


Figure 01: Restore a Backup

After selecting a backup file to restore from, Kerauno presents the administrator with a confirmation page. Please read this page carefully, as it contains important details about the backup/restore process. To complete the restore, type **RESTORE** (all caps) into the box and press the **Restore System** button.

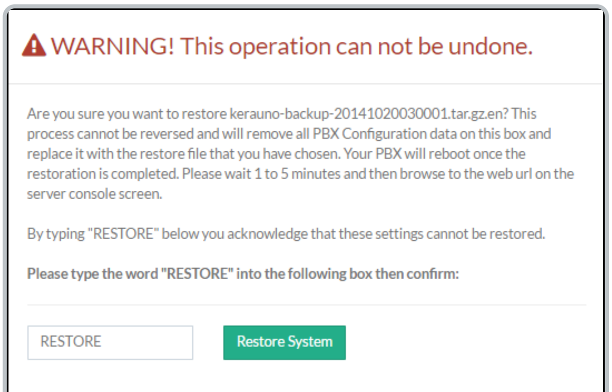


Figure 02: Backup Restoration Warning Message

Keruano will reboot once the restoration is complete. Please wait 5-10 minutes and then refresh your browser and navigate to the Kerauno URL. This 5-10 minute window does affect service; the system will not be able to take calls during this time. After logging back in, Kerauno has been restored from the selected backup and all call detail records, voicemails, and configuration settings have been reset to the time/date of the selected backup file.

Restore from an Uploaded Backup

To restore from an uploaded backup file (such as a file stored at a remote destination) press the light-blue **Choose File** button on the **Restore** tab. An explorer window will open allowing administrators to select which backup file to use as the basis for the restore. Navigate to the folder/subfolder where the desired backup is located, select the desired backup file, and press **Open** or **OK**.

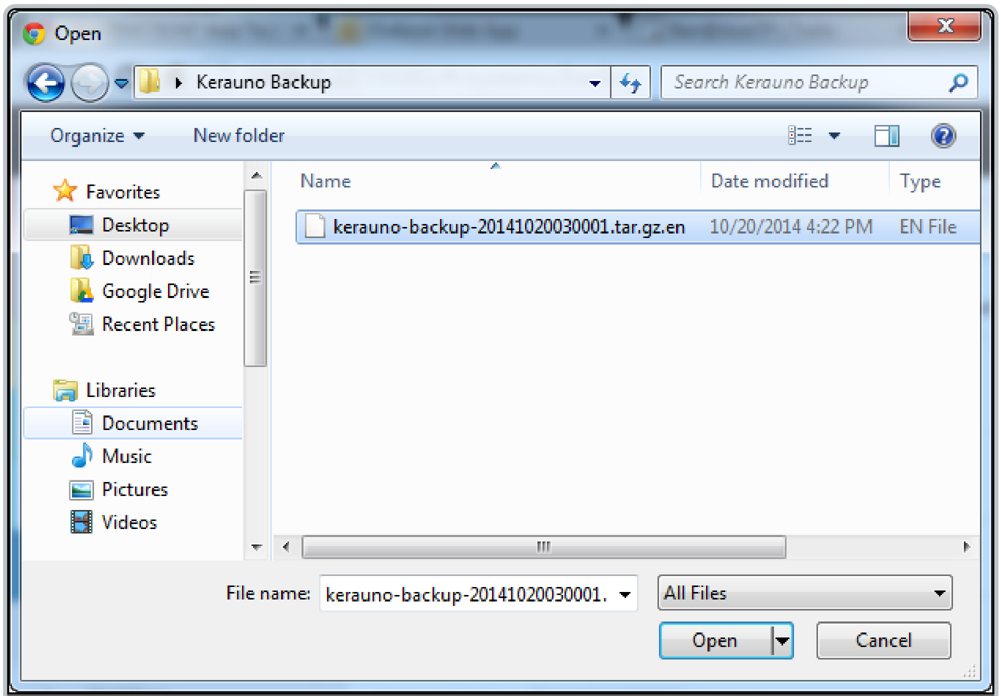


Figure 03:Uploaded File Restoration - Open Window

Once the file is selected, press the **Upload** button (as shown in the Figure 04 below) to begin uploading the file.

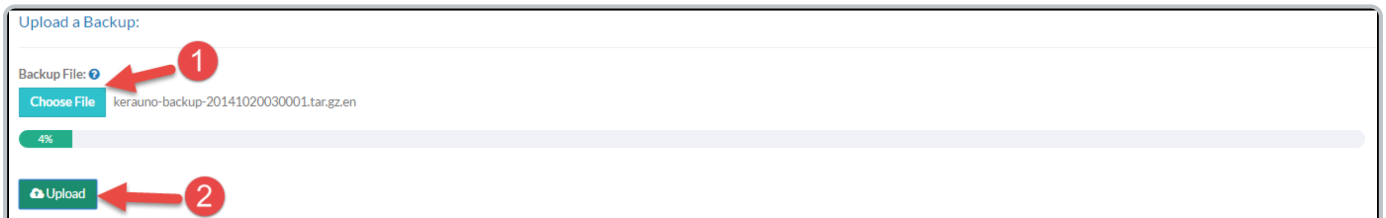


Figure 04: Upload a Backup - Selected File

Depending on the bandwidth of the connection to Kerauno and the size of the backup file, this process may take 30 minutes or more. There will be no effect on PBX functionality while this upload occurs. Kerauno will test the upload file to ensure it is a valid tar.gz.en backup file. Once confirmed the file will be placed in the list of local backups.

To restore from the newly uploaded backup, press the **Restore** button next to the file name of recently-uploaded backup file as shown in Figure 04 above. Confirm the restore according to the instructions detailed above in the **Restoring from a Local Backup** section. Kerauno will reboot once the restoration is complete; and takes approximately 5-10 minutes to reboot and restore from the uploaded backup. This 5-10 minute window does affect service; the system will not be able to take calls during this time.

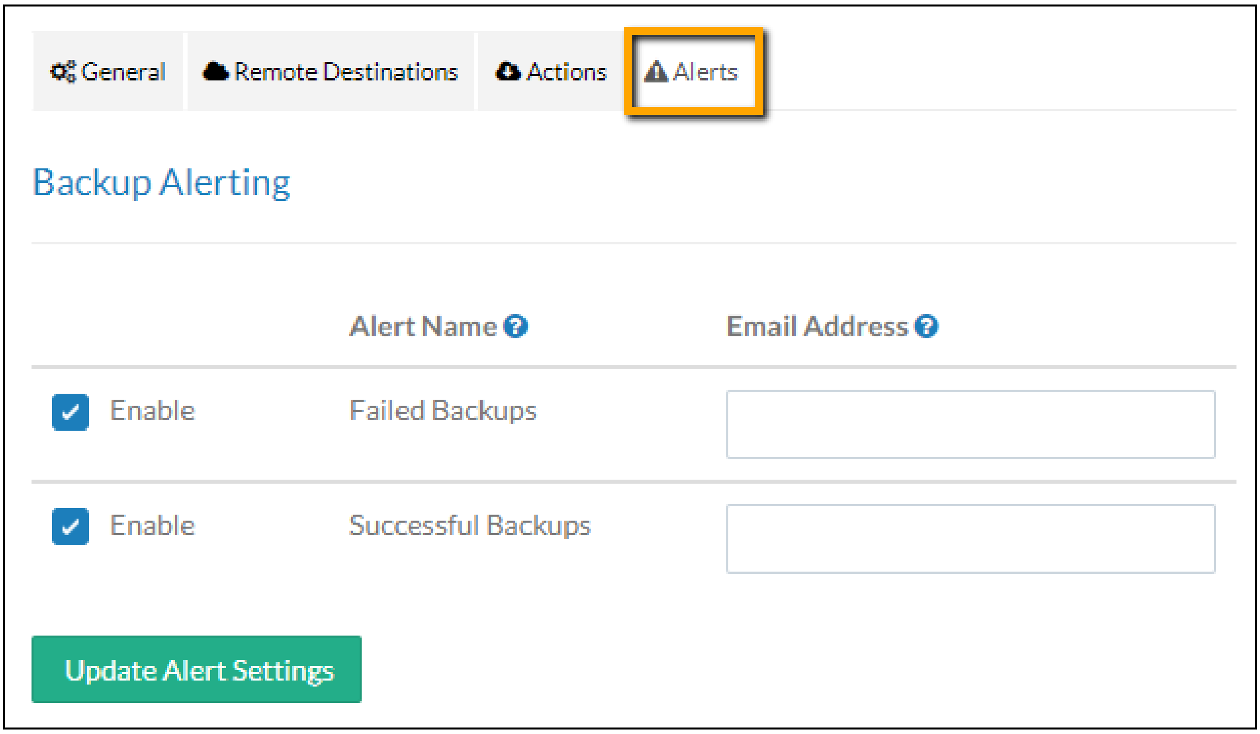
Alerts

Last Modified on 11/22/2019 3:47 pm EST

From the main menu, navigate to **System Settings > Backup/Restore > Alerts tab**.

Use Backup Alerting to receive notifications for successful and/or failed backups. Click the **Alerts** tab from the Backup/Restore screen.

Check the Enable box for each selection and enter the email address to receive the notification:



Click **Update Alert Settings** when finished.

NOTE:	Only one email address may be entered into the **Email Address** field. When multiple recipients are desired, create a distribution list and use the specified email address.

Alerts

Last Modified on 05/25/2018 10:01 am EDT

The **Alerts** screen allows the System Administrator to activate different types of email alerts in Kerauno. To activate an alert, click the appropriate checkbox in the far left-hand column of the screen to select it and enter the desired email in the right hand column.

The alerts that the System Administrator can enable include:

911 Alerts detect whenever an extension makes an outbound 911 call. Whenever the emergency dial plan is used, a notification will be sent.

CPU Utilization detects the percentage of use of the Kerauno platform's CPU. Whenever the utilization percentage surpasses the value set in the **Threshold** field, a notification will be sent.

Disk Space detects the total available hard disk space on the Kerauno platform. Whenever the percentage of hard disk used surpasses the value set in the **Threshold** field, a notification will be sent.

Dual Server Failure will let the administrator know when a backup file has been sent to the standby server and has failed, either due to running out of disk space or a network connectivity issues

Dual Server Success will let the administrator know when a backup file has been sent to the standby server and was received successfully.

Failed Backups occur when the Kerauno platform attempts a backup and fails due to loss of connectivity to a remote destination or lack of hard disk space, an email notification will be sent.

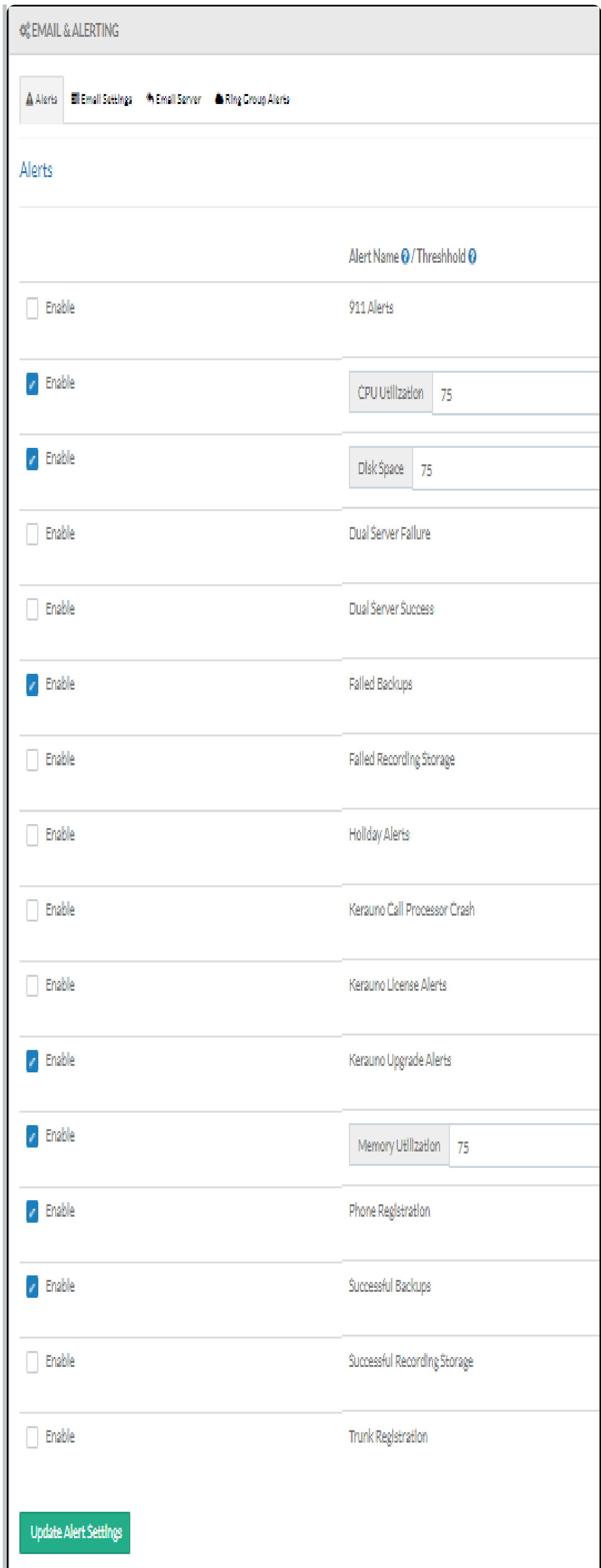


Figure 01: Email & Alerting Screen - Alerts Tab

Failed Recording Storage occurs when the Kerauno platform attempts to save call recording files and fails due to loss of connectivity to a remote destination or lack of hard disk space, an email notification will be sent.

Holiday Alerts let the admin know when they have an upcoming Holiday filter enabled.

Kerauno Call Processor Crash is sent when the Kerauno platform detects and issue with the Call Processor. This could be something like a hung call, a message that fails to play successfully, or an improperly configured system that gives callers an error message.

Kerauno License Alerts notify you when a Kerauno license is approaching expiration. One email is sent at each 90,60,30,14,7,5,3,2,1 days prior to expiration.

Kerauno Upgrade Alerts notifies you when a new Kerauno patch or update is available to download, an email notification is sent.

Memory Utilization detects the percentage of use of the Kerauno platform's RAM and Swap (Virtual) Memory. When the memory utilization percentage surpasses the value set in the **Threshold** field, a notification is sent.

Phone Registration detects the registration status of phone handsets at 15 minute polling intervals and will send a notification every time a phone becomes registered or unregistered.

Successful Backups occur when the Kerauno platform attempts a backup (either local or remote) and is successful, a notification will be sent.

Successful Recording Storage occurs when the Kerauno platform attempts to save call recording files (either local or remote) and is successful, a notification will be sent.

Trunk Registration detects the current status of trunks on the Kerauno platform and sends a notificatoin every time a trunk becomes registered, unregistered, or unreachable.

When selection is complete, select the **Update Alert Settings** button to save changes.

Adding Multiple Emails to an Alert

Up to three (3) separate email addresses can be added to the notifications list for any alert in the system. To add an email to an alert, click the green plus sign (+) to open up an additional notifications box.

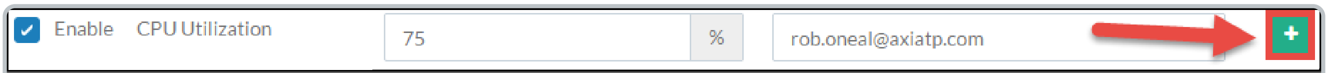


Figure 02: Add an Email to an Enabled Alert

An additional blank “email” field is created for the selected alert. In the second box, type the desired recipient email the notification should be sent to.

Clicking the red minus sign (–) will remove an email from the list.

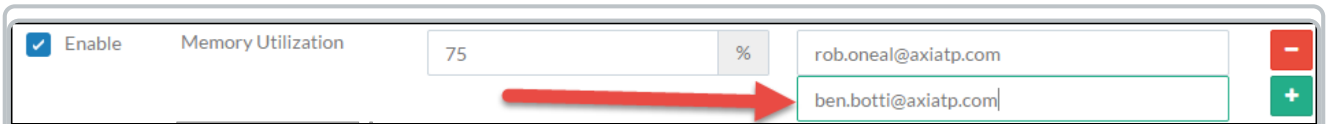


Figure 03: Remove an Email from an Enabled Alert

When finished making modifications, press the green **Update Alert Settings** button to save changes.

Email Settings

Last Modified on 04/24/2019 11:39 am EDT

The **Email Settings** screen is the first screen that a System Administrator will see when selecting the **Email & System Alerting** menu. This section allows the System Administrator to set the desired From emails for reporting exports, voicemail to email, faxing, and system alerts. Email addresses set in this screen will be the email addresses that Users and Administrators receive Kerauno notifications from. System Administrators can modify the display name for a specific email address.

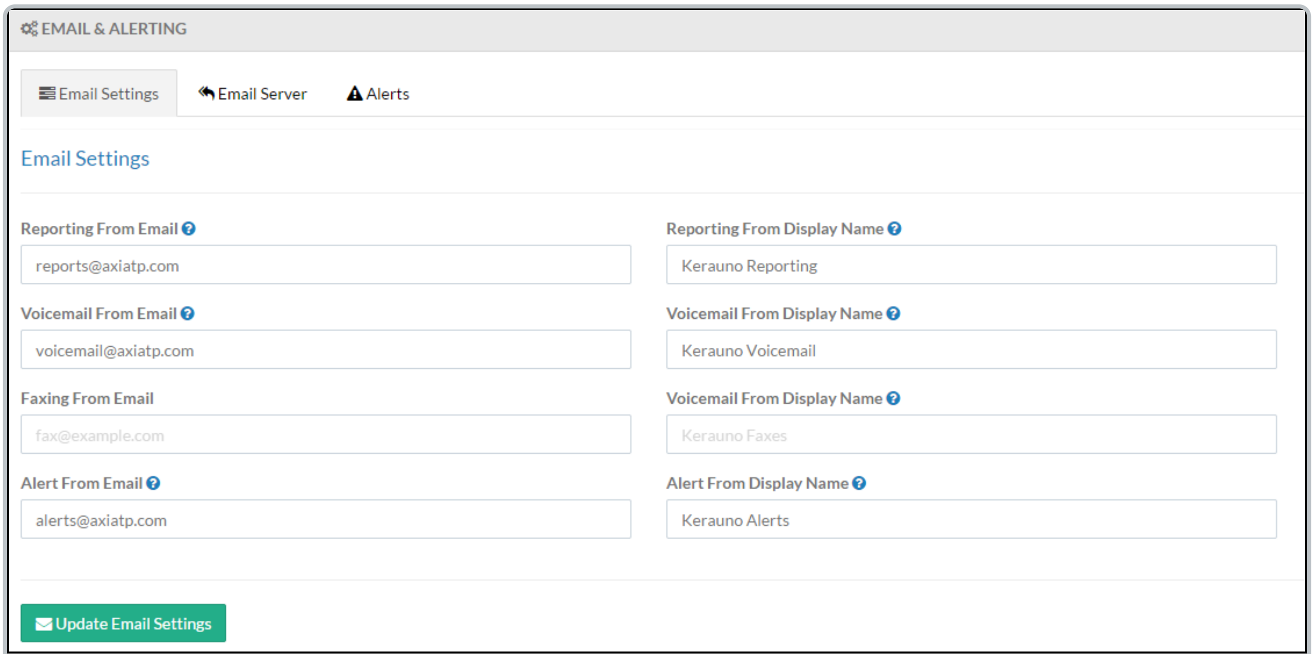


Figure 01: Email & Alerting Screen - Email Settings Tab

To update these settings, modify them under the respective section and select the green **Update Email Settings** button.

Email Server

The **Email Server** tab allows administrators to configure and test the appropriate method for delivering emails to their mail server. The email method determines if Kerauno will use **MX** or **Relay** settings to reach the organization's mail server. The default email method is **MX Lookup**. If this option is enabled, Kerauno will attempt to use DNS to resolve and look up the destination email server. If the **Relay** option is selected, Kerauno will send all emails directly to a user-specified email server. The **Relay** setting is typically used if there is an On-Premise email server.

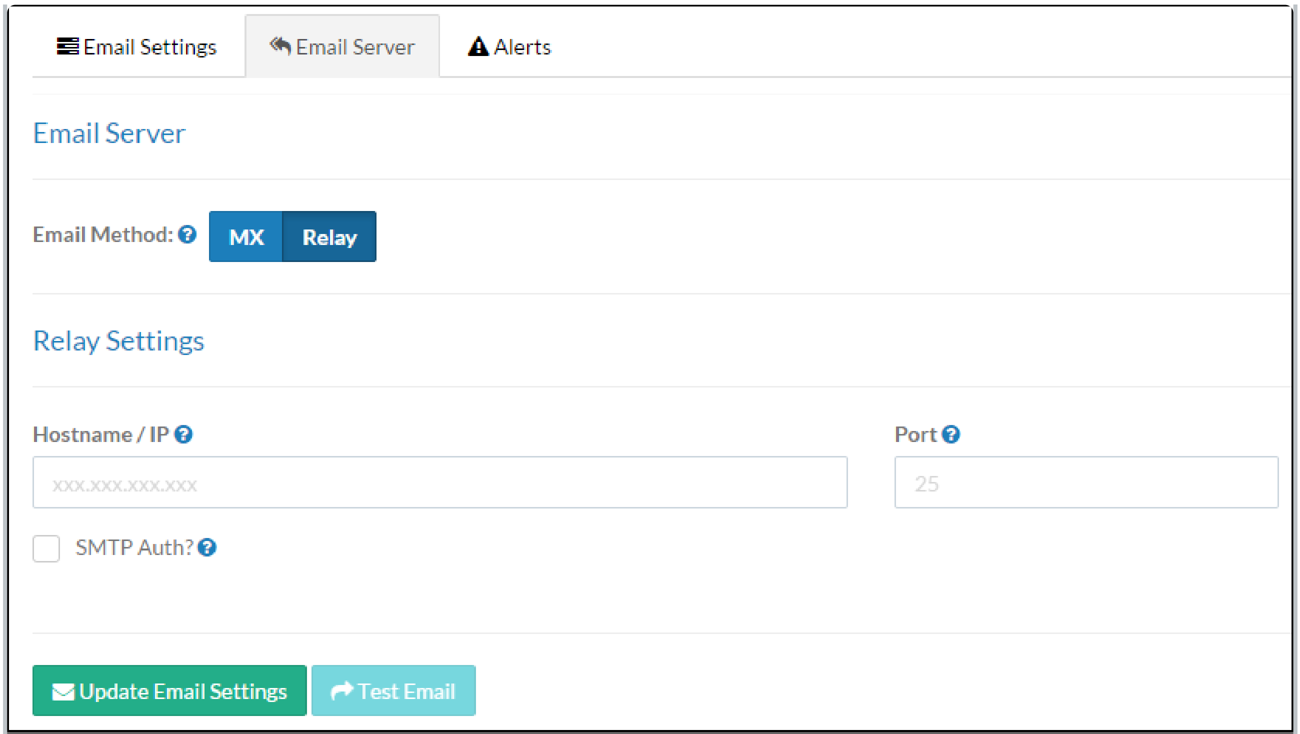


Figure 02: Email & Alerting Screen - Email Server Tab

If selecting the **Relay** email method, additional options for putting the **Hostname/IP**, **Port**, and **SMTP Auth** configuration will be displayed.

Hostname/IP

Hostname/IP: Enter the specific hostname or IP address of the mail server.

Port: Enter the specific port that the company's mail server uses to accept incoming SMTP protocols. The default port is port 25.

SMTP Auth?: Toggle the checkbox to selected if the email server requires SMTP authentication to deliver or relay mail.

After completing all settings on this screen, press the light-blue **Test Email** button to send a test email to test the connection between Kerauno and the configured mail server.

Ring Group Alerts

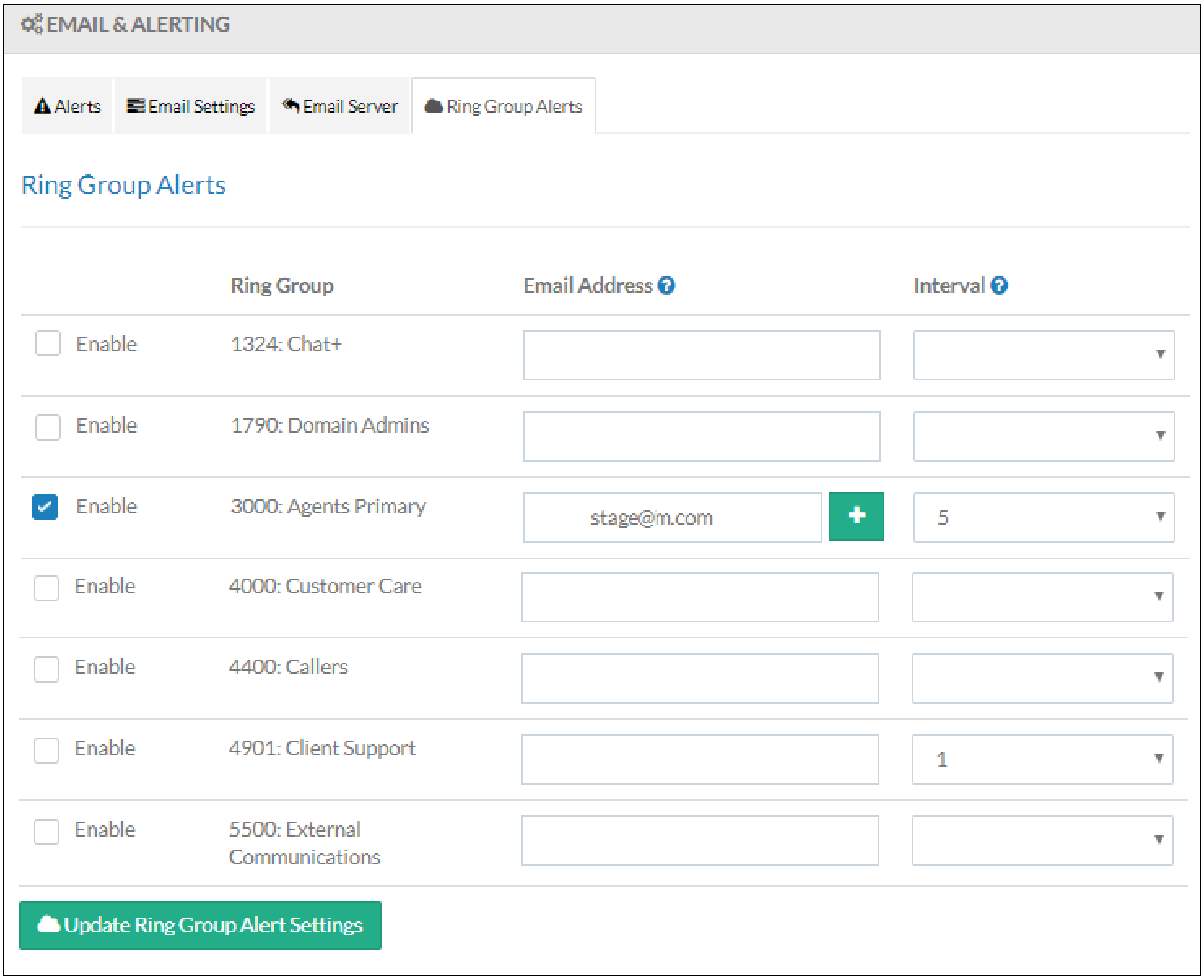
Last Modified on 09/26/2019 1:04 pm EDT

Ring Group Alerts are ideal for managers and Call Center owners and provide interval based analytics. These reports are routed via email and can be sent to any email address, even outside your organization.

To establish threshold alerts based on the number of calls or hold time in a Ring Group, navigate to **Administration > Interaction Routing > Call Ring Groups**, Alerts tab.

A Kerauno Admin navigates to **System Settings > Email & System Alerting** to create and manage Ring Group Alerts.

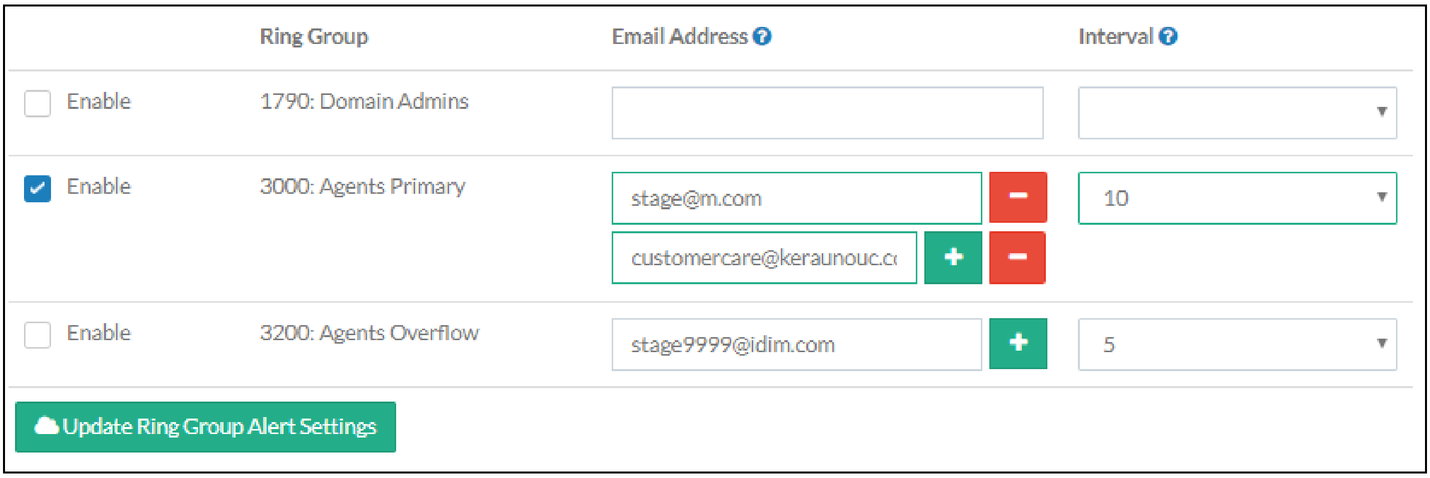
Main Menu



Add Ring Group Alert

Click the **Enable** checkbox for the appropriate Ring Group, enter an email address, and select the Interval. Click the green plus icon to add an additional email address. An interval is the number of minutes Kerauno waits before generating a Ring Group alert email. Click **Update Ring Group Alert Settings** when finished.

Example: When set to 10 (minutes), a report is generated every 10 minutes and sent to the recipient via email.



Example Ring Group Report:

Each report includes Date/Time, Event, Agent that took the call, Talk Time, and Hold Time.

Kerauno
EMPOWERING COMMUNICATIONS

Kerauno PBX - Ring Group Alert (4701: K: Customer Care)

Kerauno PBX Ring Group Calls in last 5 minutes:

Date / Time	Event	Agent Answered	Talk Time	Hold Time
2019-09-26 10:20:33	QueueCallerAbandon		00:00:00	00:00:06
2019-09-26 10:20:40	QueueCallerAbandon		00:00:00	00:00:04
2019-09-26 10:20:45	QueueCallerAbandon		00:00:00	00:00:03
2019-09-26 10:20:50	QueueCallerAbandon		00:00:00	00:00:03
2019-09-26 10:20:55	QueueCallerAbandon		00:00:00	00:00:02

This is an automated email, delivered from the CORPORATE - Axia, Kerauno, KSG System. Please do not reply to this message as it is an un-monitored mailbox.

Licensing

Last Modified on 04/11/2019 3:29 pm EDT

Kerauno licenses control the number and type of users who can access the application.

The **Licensing** menu allows administrators to view the current license applied for the phone system.

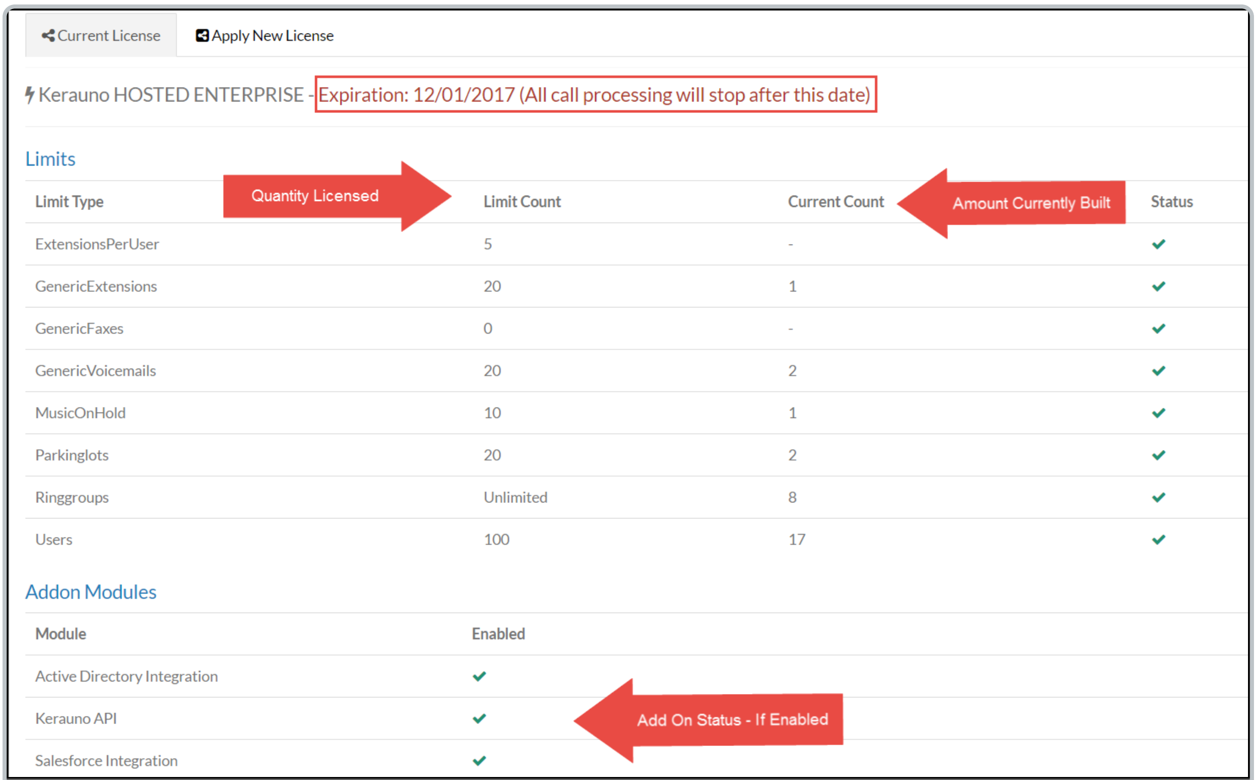


Figure 01: Licensing Menu

At the top of the Licensing screen, the expiration date of the license is shown. Alerts will be sent to the system and administrator 90, 60, 30, and 7 days away from license expiration.

The number of objects built and licensed on the phone system is displayed in the **Limits** table. The **Limit Count** column displays the maximum amount of a particular object that can be built within the Kerauno system. Depending on the type of licensing that has been enabled, these amounts may vary.

The **Current Count** displays the number of a particular item that is currently built into the Kerauno platform. As long as the **Current** count is less than the value listed in the **Limit** count, administrators will be able to add new objects of these particular types to Kerauno.

If the **Current** count is equal to the **Limit** count, the phone system has reached the maximum amount for the specific object for its particular license. If an administrator attempts to add more of that specific object, a message will display notifying the administrator that the new object is unlicensed and to contact either their account executive or support team so that an additional license may be purchased.

Underneath the license counts section, a list of workflow modules will be shown. If a particular module is enabled in the license (Such as **Salesforce Integration** or **Active Directory Integration**) these items will show with a green checkmark sympbol, signifying that they are fully licensed.

Migration Kit formerly Extension Alias

Last Modified on 11/22/2019 1:19 pm EST

From the main menu, navigate to **System Settings > Migration Kit.**

The Migration Kit allows organizations to map legacy system extensions to a new extension range in Kerauno. Once configured, calls to an old extension are forwarded to the user's new Kerauno extension. This feature minimizes confusion when moving to a new phone system.

Example: Suzy had extension 302 on her old phone system before migrating to Kerauno. When a caller dials 302, they are automatically forwarded to her new extension, 1101 on Kerauno.

Add Alias

Establish an Extension Alias first for each legacy system extension. Click **+Add Alias** to add a new alias for the new Kerauno extension.

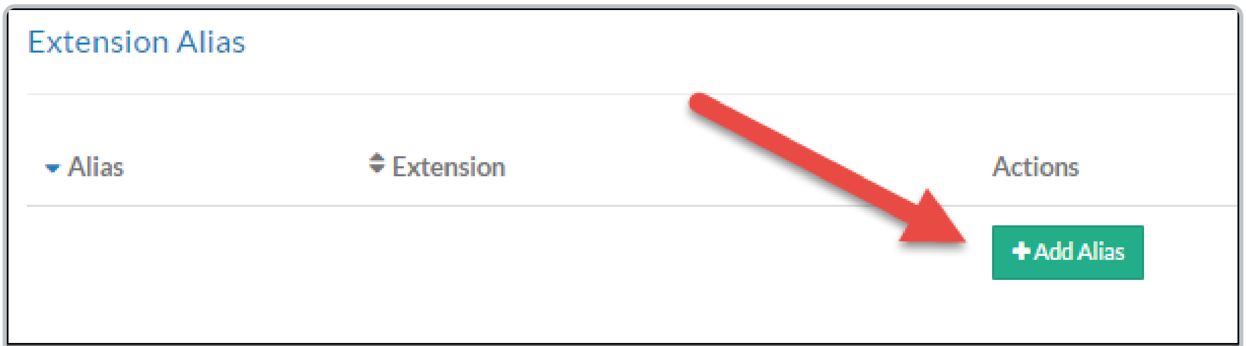


Figure 01: Migration Kit Extension Alias Screen

Populate the New Alias screen. The **Alias Extension** is the number used on the system that is migrating to Kerauno. Three, four, or five-digit extensions may be used in this field.

The Extension field is the new extension on the Kerauno system. Only one active Kerauno user from the drop-down box may be selected.

Note: 911 cannot be used as an alias as it is reserved for emergency calls only.

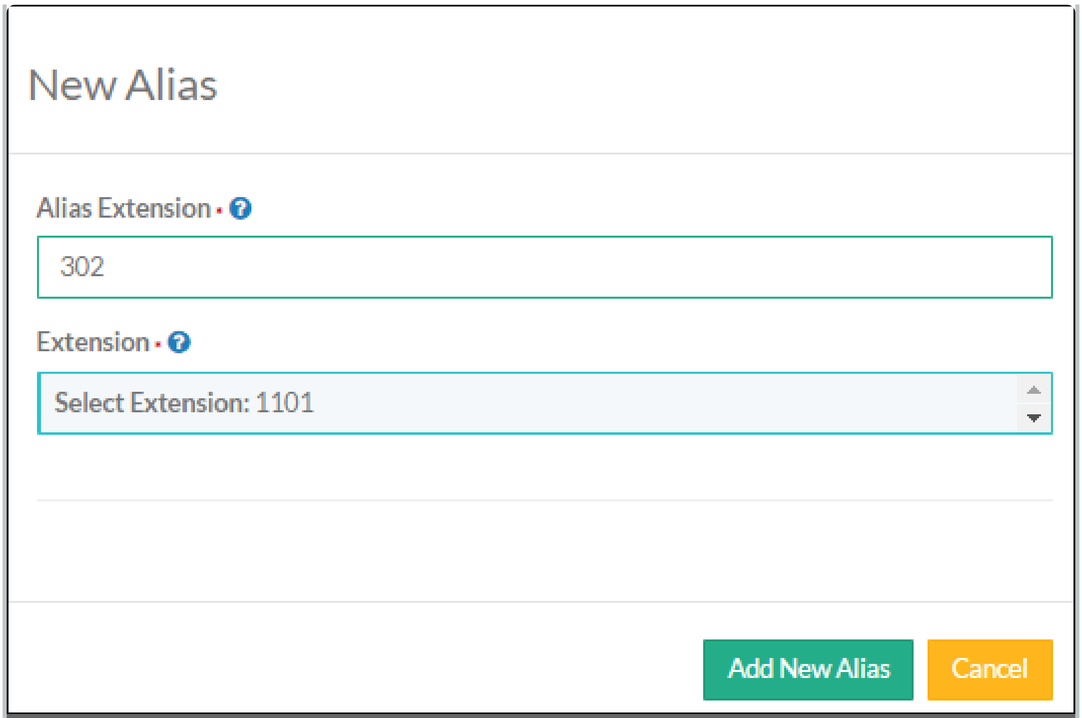


Figure 02: New Alias Screen

When finished, click the green **+Add New Alias** button.

Adding New Migration Kit Rules

After clicking the **Add Alias** button, Kerauno prompts the System Administrator with the **New Alias** pop-up box. This window allows the System Administrator to set up translations from three-, four-, or five-digit legacy extensions to any built extension or user in Kerauno.

Select a three-, four-, or five-digit legacy extension and enter it into the **Alias Extension** field. Select the active Kerauno user calls will be forwarded to for this alias and enter it into the **Extension** field. After both options have been completed, click the **Add New Alias** button in the pop-up window to activate the new Migration Kit Rule.

Modifying or Deleting Migration Kit Rules

From the main Migration Kit screen, press the blue **Modify Alias** button under the **Actions** column.

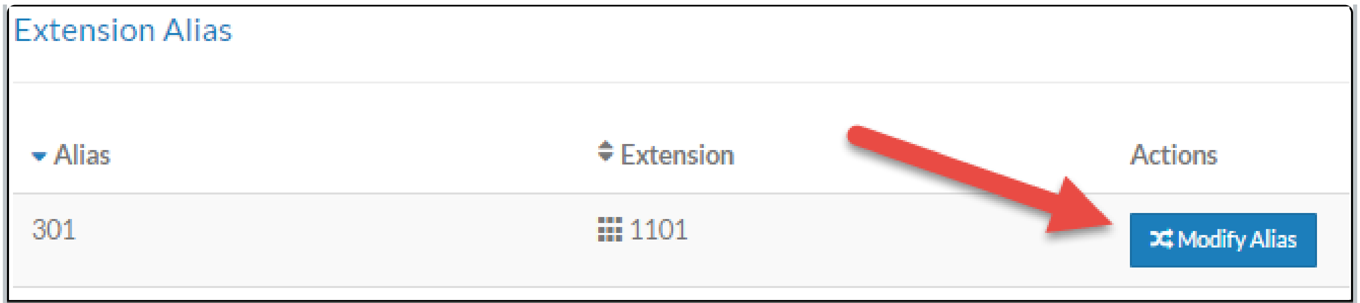


Figure 03: Extension Alias Screen - Modify Alias Button

The **Modify Alias** pop-up box displays, allowing the Administrator to change both alias and extension information. After making the necessary changes, press the green **Modify Alias** button to activate the changes. To delete a migration kit rule, press the red **Delete Alias** button and the rule will be removed.

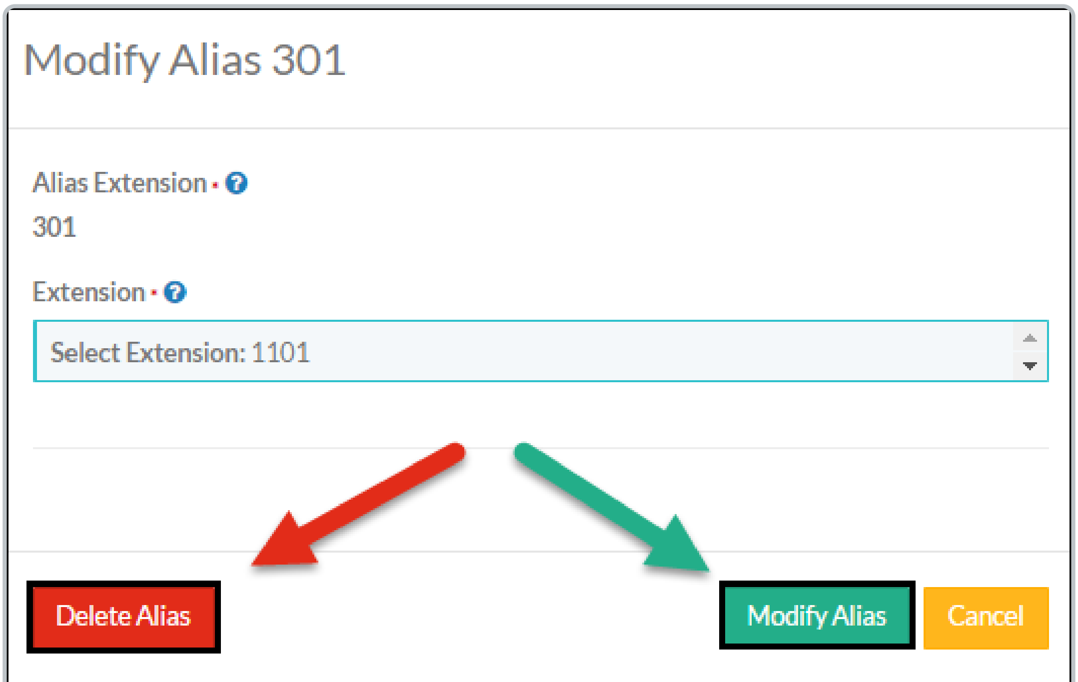


Figure 04: Modify Alias Pop-up Screen

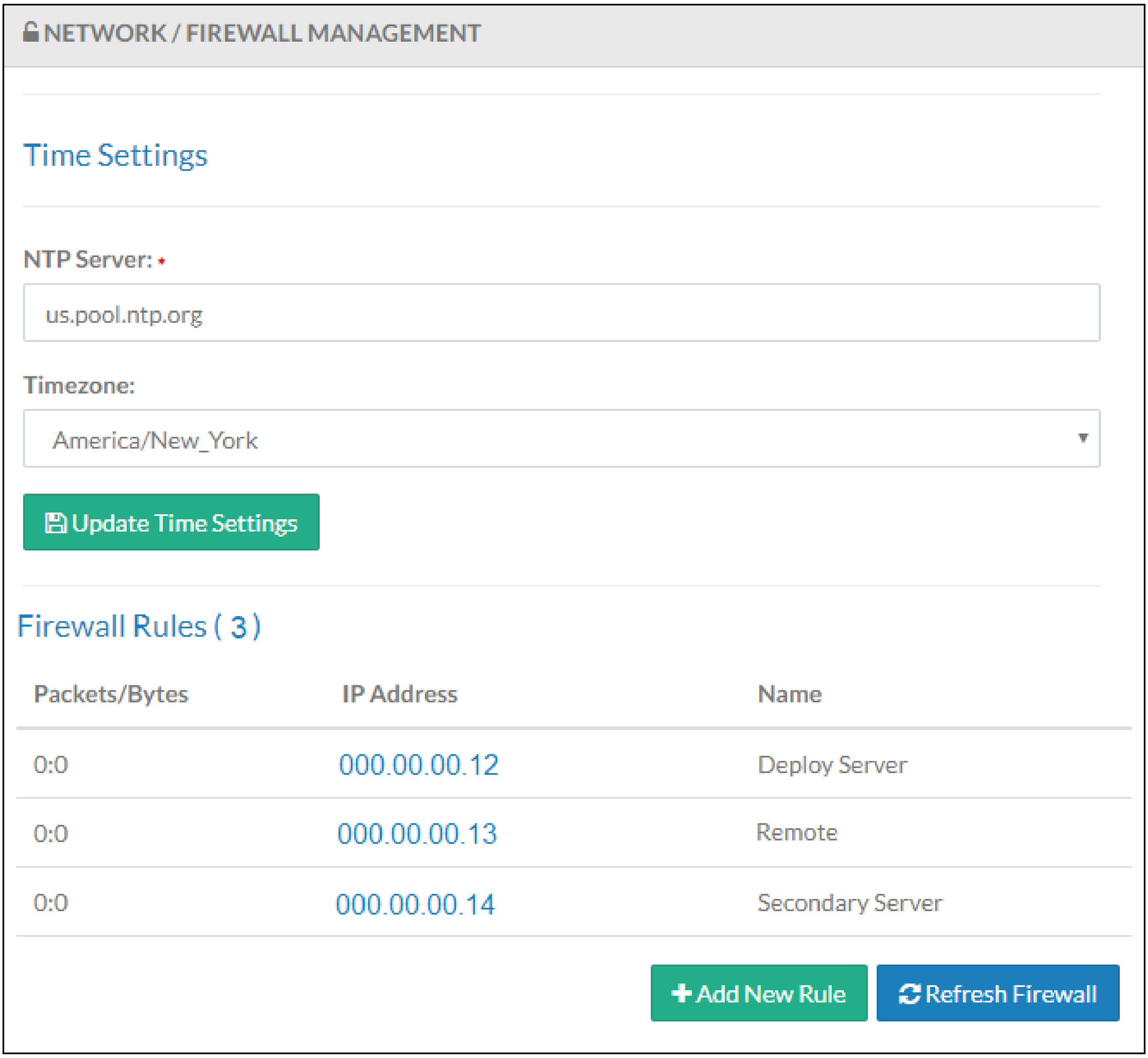
Firewall Rules & Time Zone - GENERAL USERS

Last Modified on 11/22/2019 1:12 pm EST

From the main menu, navigate to **System Admin > Network & Firewall**.

General users can view and manage Time Settings and Firewall Rules. [Installers can manage additional options including Interface Routing and HTTPS].

Main Menu:

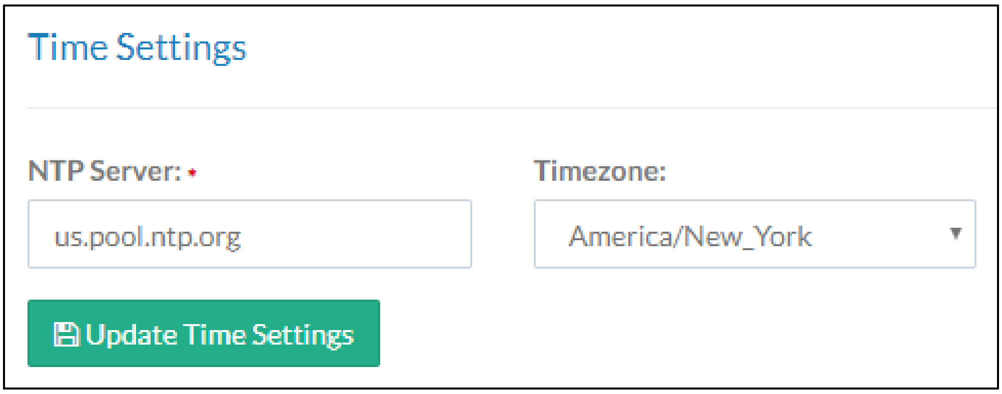


Time Settings

The NTP Server name and Time Zone can be edited from this screen.

NTP Server: The NTP server regulates the internal time clock in Kerauno. The default NTP server is us.pool.ntp.org – a public NTP service.

Timezone: Time zone for the internal time of Kerauno. Note: Individual time zones can be set for each extension under Users & Devices when employees are dispersed geographically across various time zones.



Firewall Rules

An installer has permission to manage Firewall Rules. Communication traffic to Kerauno is blocked by default, with the exception of the Kerauno Management network and any trunks set up in the System & Settings > Trunks menu.

Firewall Rules allow specific IP addresses to be white listed to pass through Kerauno unobstructed. The firewall tool is particularly useful when setting up phones for remote users who are utilizing their own home internet connections.

When accessing Kerauno via the web GUI, an installer must white list the public IP address of the network or PC in order to gain access to the Kerauno Presence module. Also, devices cannot properly register to Kerauno until the IP address is white listed.

To find your public IP address, go to https://www.google.com/#q=my+ip+address.

Active Firewall Rules appear on the main screen. Only IP addresses saved here are able to send traffic to and from Kerauno. The Packets/Bytes column represents the number of incoming packets from each IP address, as well as how many total bytes of data were transferred through those packets.

Add Firewall Rule

To add a new firewall rule, click **+ Add New Rule**. Populate the **IP Address** or Hostname the traffic originates from. Ensure all phone system users are configured with a static public IP address. When configured with a dynamic IP address the firewall must be modified each time the dynamic IP address changes. When a static IP is not an option, enter a DNS hostname when creating a firewall rule.

Provide an easily recognizable name for the firewall rule. Then click **+Add Firewall Rule** to save the changes.

Delete Firewall Rule

Delete a Firewall Rule to revoke access to send and receive data from Kerauno. Click the corresponding rule on the main menu. Then click **Delete Firewall Rule** on the resulting screen.

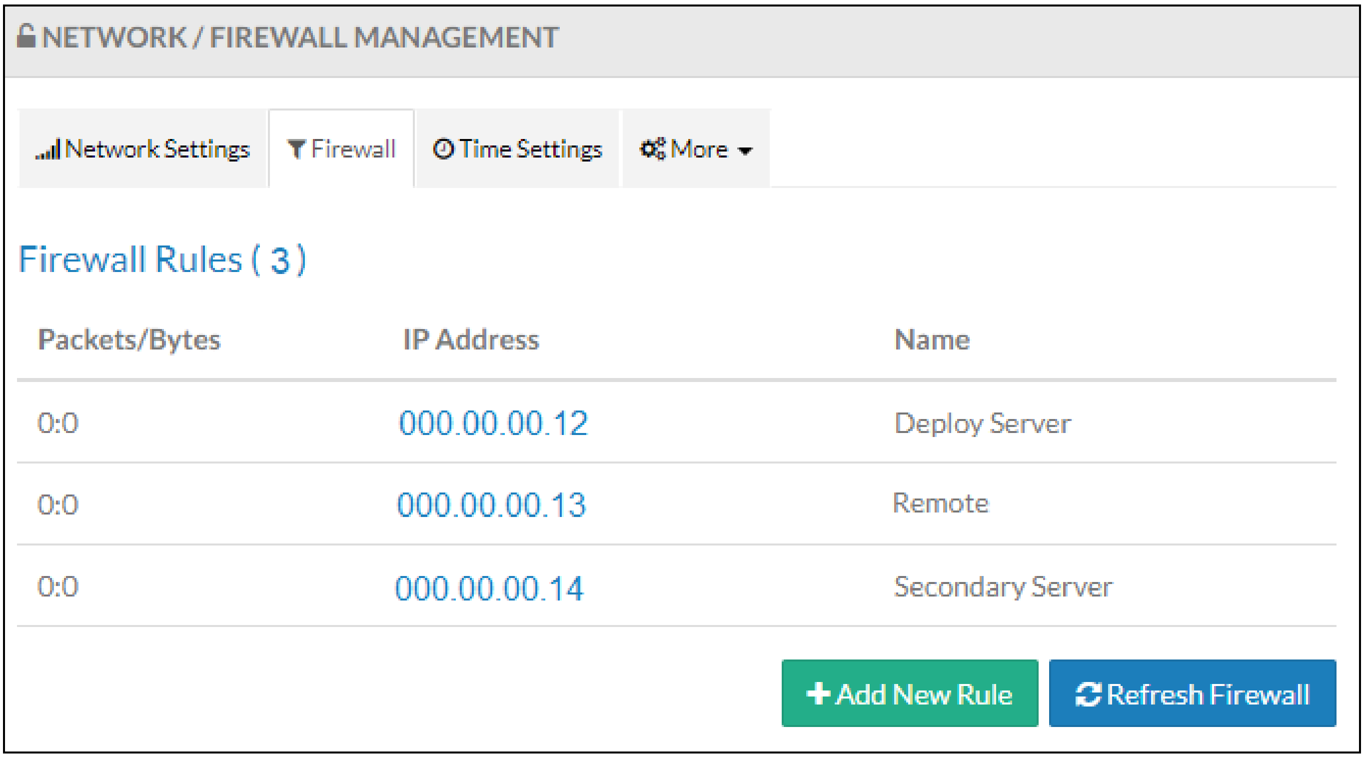
Network & Firewall - INSTALLERS

Last Modified on 11/22/2019 3:43 pm EST

From the main menu, navigate to **System Admin > Network & Firewall**.

An installer can view and manage Network Settings, Firewall, Time Settings, Interface Routing, and HTTPS. General users can view and manage Time Settings and Firewall Rules.

Main Menu:



Network Settings

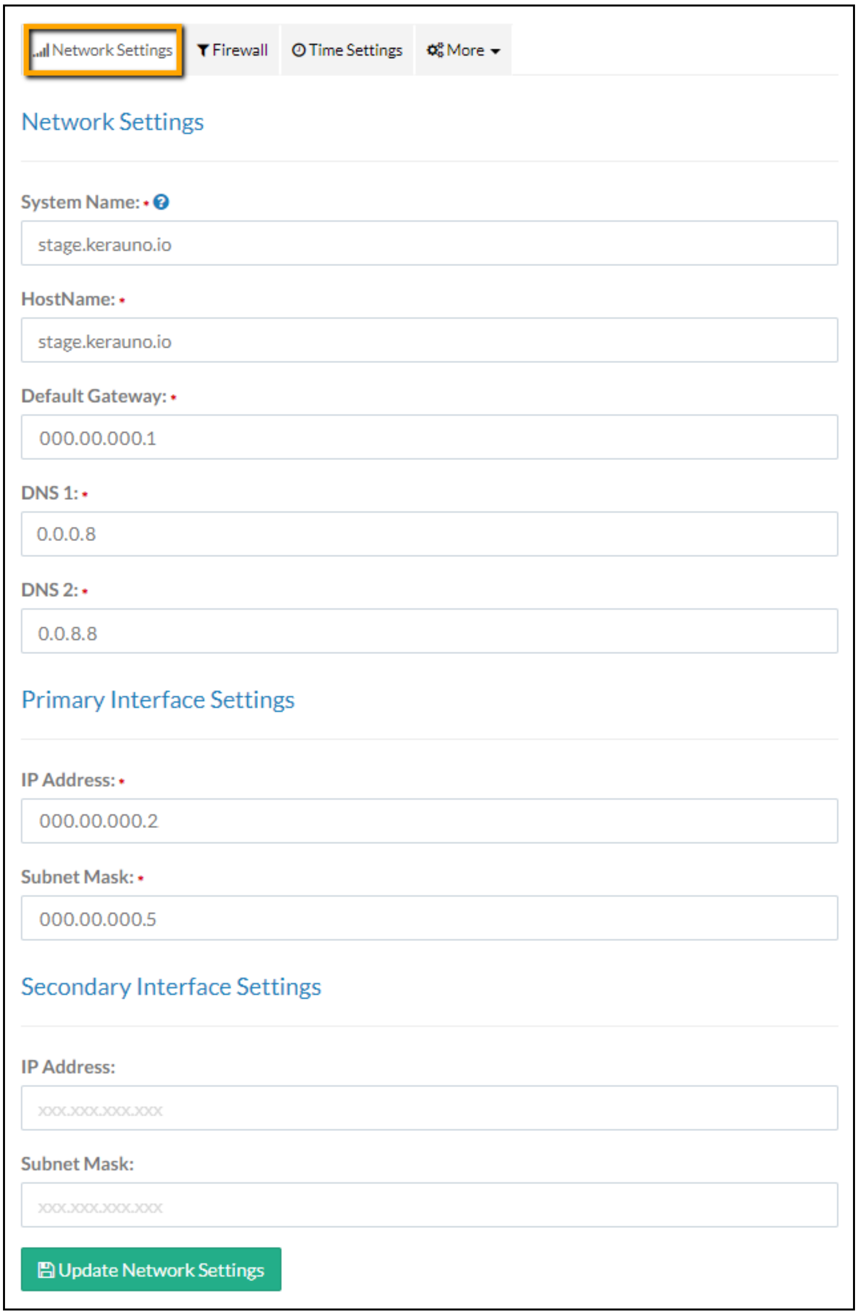
Note: Hosted systems should reach out to support instead of altering content.

Configure the network, DNS, and Interface settings of the Kerauno server on the **Network Settings** tab. Common edits include System Name and changes to reflect network changes.

Populate the fields:

- System Name: Name of the system; referenced in alerting and reporting emails.

- HostName: Name assigned to this Kerauno instance (ex. servername.kerauno.io).
- Default Gateway: IP address of the default gateway on the network.
- DNS 1: IP address of the primary DNS server.
- DNS 2: IP address of a secondary DNS server.
- Primary Interface Settings
  - IP Address: Public IP address of the Kerauno server.
  - Subnet Mask: Subnet mask of the network the Kerauno server is connecting to. (Will be provided).
- Secondary Interface Settings
  - IP Address: Public IP address of the Kerauno server. (Prepopulated).
  - Subnet Mask: Subnet mask of the network the Kerauno server is connecting to. (Will be provided).
- When finished modifying settings, click **Update Network Settings** to save changes.



Firewall

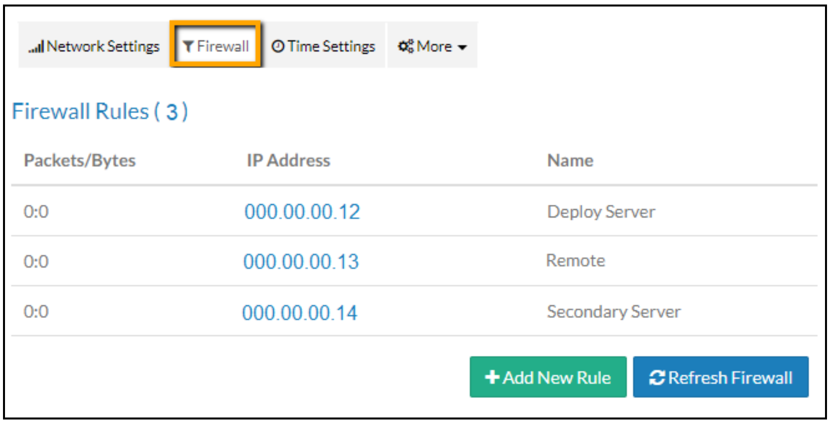
Communication traffic to Kerauno is blocked by default, with the exception of the Kerauno Management network and any trunks established from **System & Settings > Trunks** menu. Click the **Firewall** tab to establish rules to whitelist specific IP addresses to pass through Kerauno unobstructed. This tool is particularly useful when setting up phones for remote users who are utilizing their own home internet connections.

When accessing Kerauno via the web GUI, an installer must whitelist the public IP address of the network or PC in order to gain access to the Kerauno Presence module. Also, devices cannot properly register to Kerauno until the IP address is white listed.

To find your public IP address, go to https://www.google.com/#q=my+ip+address.

Active Firewall Rules appear on the main screen. Only IP addresses saved here are able to send traffic to and from Kerauno. The Packets/Bytes column represents the number of incoming packets from each IP address, as well as how many total bytes of data were transferred through those packets.

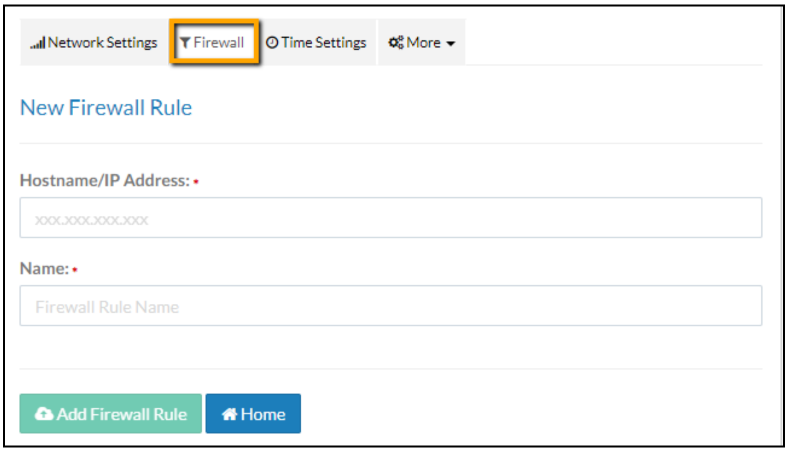
Main Menu:



Add Firewall Rule

To add a new firewall rule, click **+ Add New Rule**. Populate the **IP Address** or Hostname the traffic originates from. Ensure all phone system users are configured with a static public IP address. When configured with a dynamic IP address, the firewall must be modified each time the dynamic IP address changes. When a static IP is not an option, enter a DNS hostname when creating a rule.

Provide a recognizable name for the firewall rule. Then click **+Add Firewall Rule** when finished.



Delete Firewall Rule

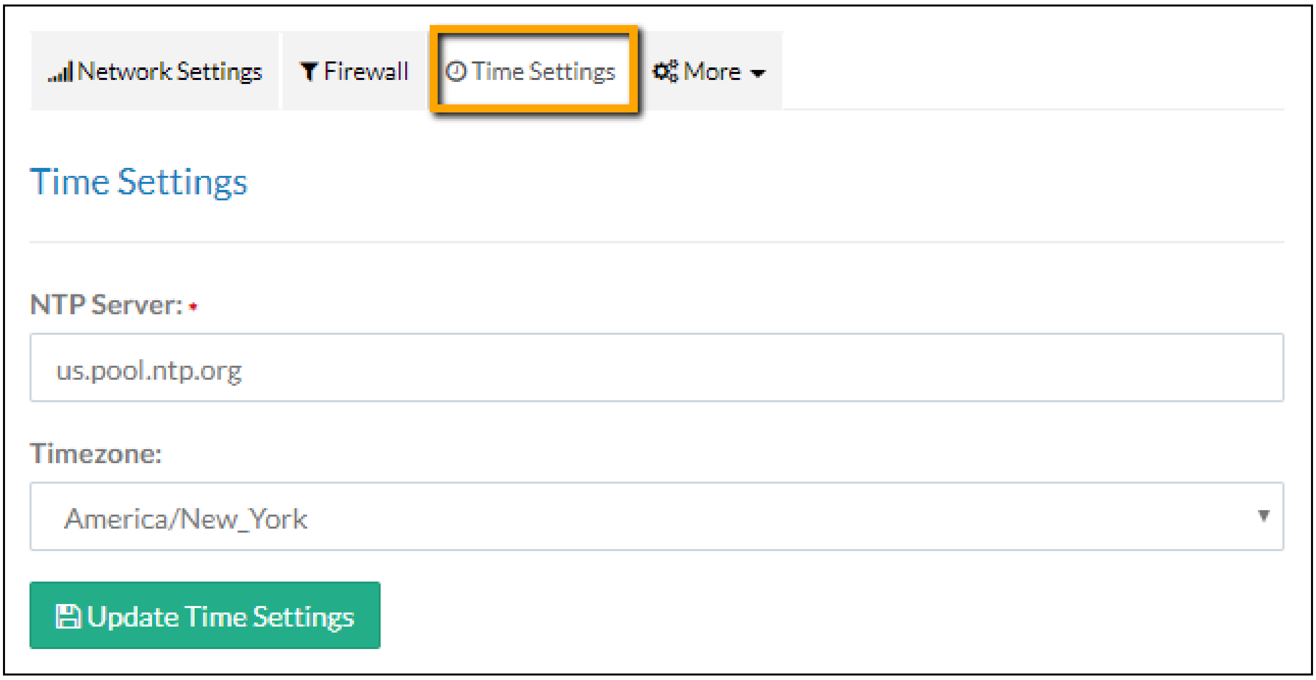
Delete a Firewall Rule to revoke access to send and receive data from Kerauno. Click the corresponding rule on the main menu. Then click **Delete Firewall Rule** on the resulting screen.

Time Settings

The NTP Server name and Time Zone can be edited from the **Time Settings** tab.

NTP Server: The NTP server regulates the internal time clock in Kerauno. The default NTP server is us.pool.ntp.org – a public NTP service.

Timezone: Time zone for the internal time of Kerauno. **Note:** Individual time zones can be set for each extension under Users & Devices when employees are dispersed geographically across various time zones.



Interface Routing

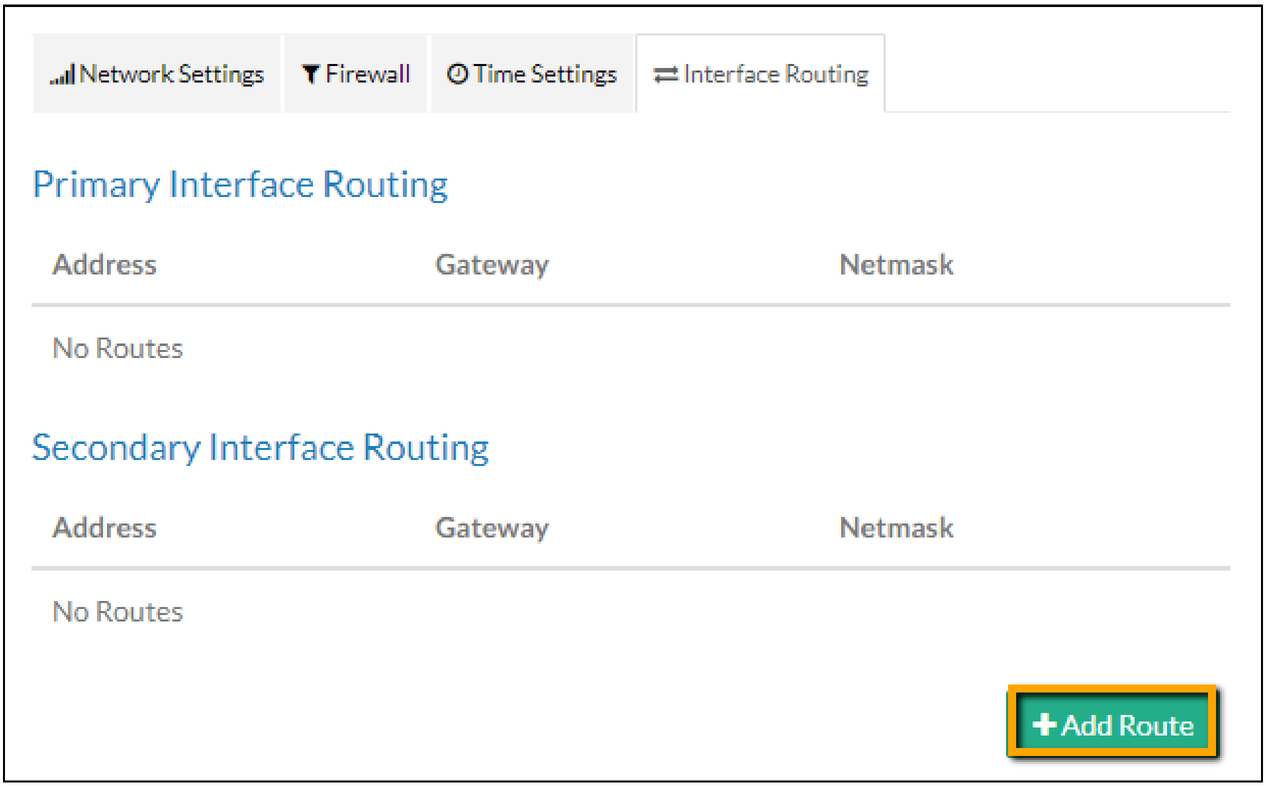
Note: Premise instances only.

The **Interface Routing** tab from the **More** drop-down menu allows installers to route traffic for a particular destination (IP address) that is not serviced by the default gateway. Example: separate VLAN internally. An Interface Route is helpful when there are multiple network interfaces on a premise deployment.

Work with your network provider and IT team to determine if an Interface Route is required.

Add Interface Route

To add a new interface route, click **+ Add Route**.



Populate the fields:

- Interface – select either Primary or Secondary from the drop-down menu.
- IP Address: Public IP address of the Kerauno server.
- Gateway: Gateway IP address.
- Netmask:
- Click **Add Route** when finished.

Edit Route

Click the corresponding Route on the main menu. Edit as needed and click **Update Route** on the resulting screen.

Delete Route

Click the corresponding Route on the main menu. Then click **Delete Route** on the resulting screen.

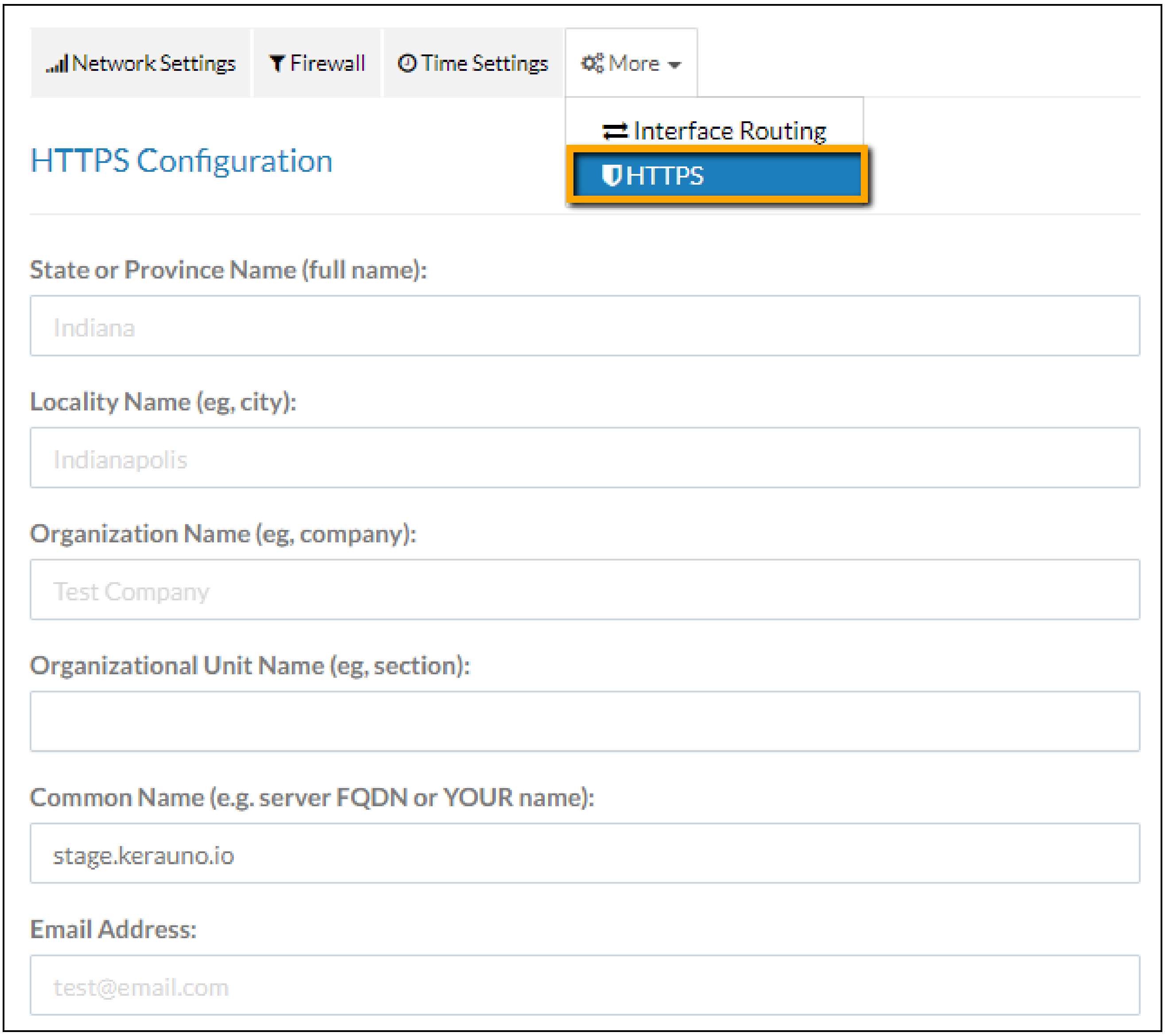
HTTPS

Click the **HTTPS** tab from the **More** drop-down menu to manage SSL Certificates.

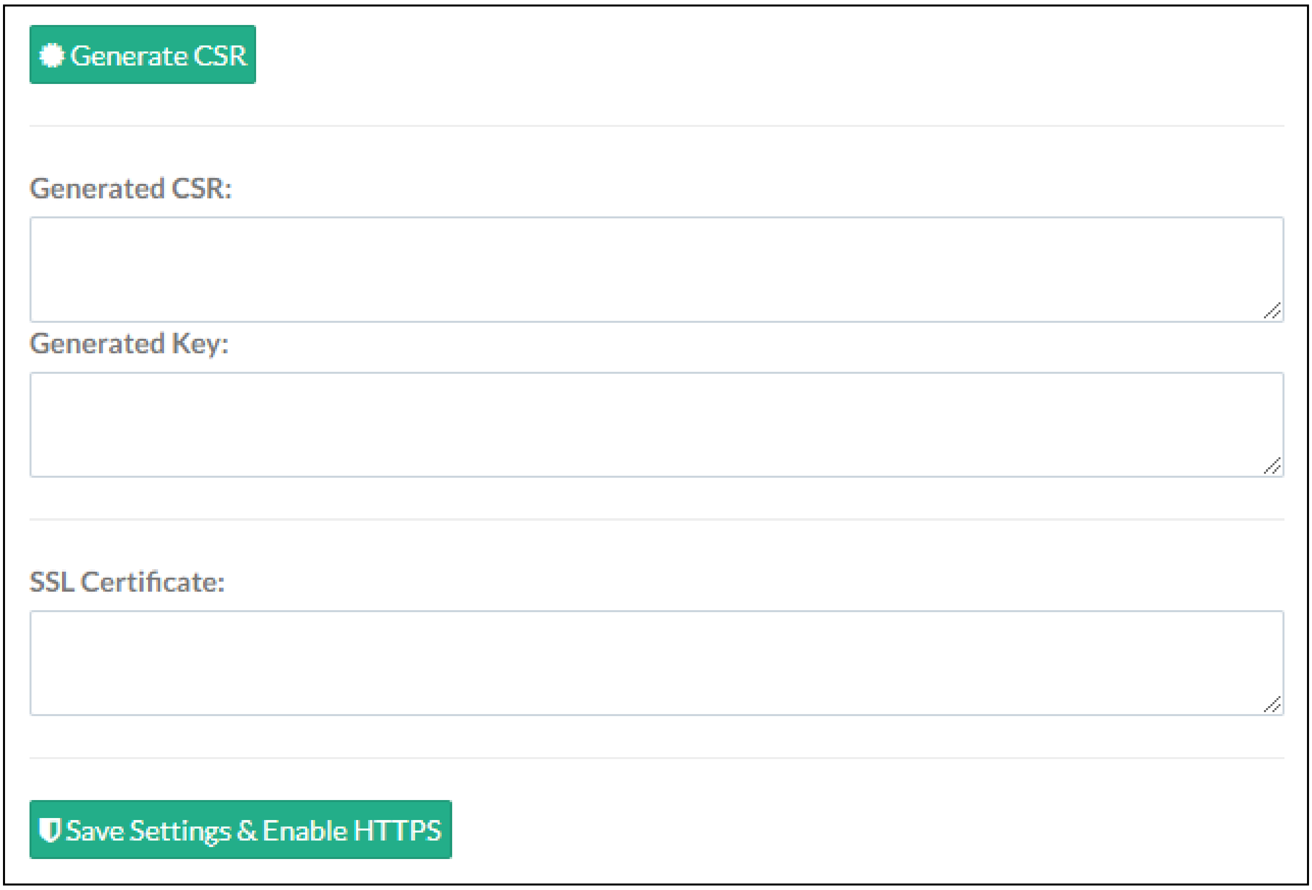
Note: Reserved for Premise users only maintaining their own SSL certs. Example SSL providers include Godaddy, VeriSign, and LetsEncrypt.

Populate the fields:

- State or Province Name (full name)
- Locality name (eg.city)
- Organization name (eg, company)
- Organizational Unit Name (eg, section)
- Common Name (eg, server FQDN or YOUR name)
- Email Address



- Generate CSR - Click **Generate CSR** once all information is recorded above.
- Generated CSR - Send the data in the Generated CSR field to your SSL provider.
- Generated Key
- SSL Certificate - Paste the SSL Certificate data received from your SSL provider in the **SSL Certificate** field.
- Click **Save Settings & Enable HTTPS** when finished.



Available Updates

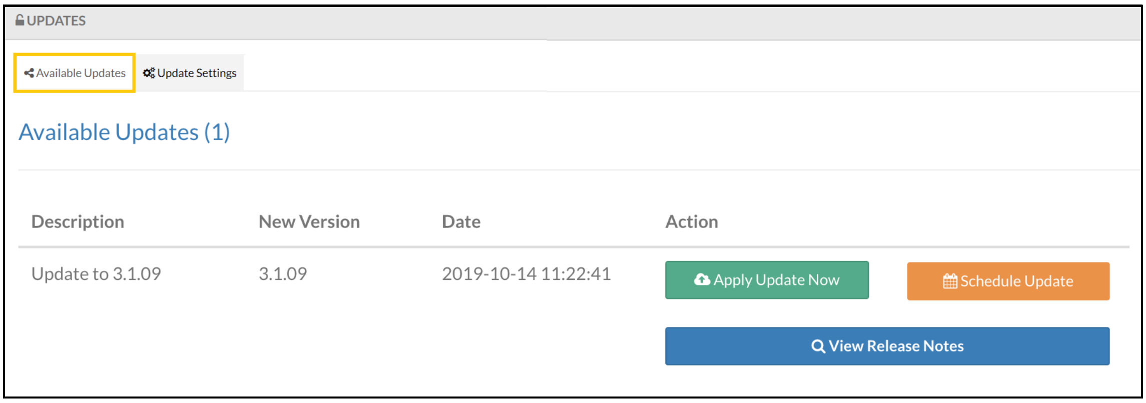
Last Modified on 11/22/2019 3:39 pm EST

From the main menu, navigate to **System Settings > Updates**.

When new updates are available in Kerauno, an Administrator or Installer accesses the **System & Settings** > **Updates** menu to download the latest version. Configure alerts for Kerauno updates from the **System & Settings** > **Email & System Alerting** menu.

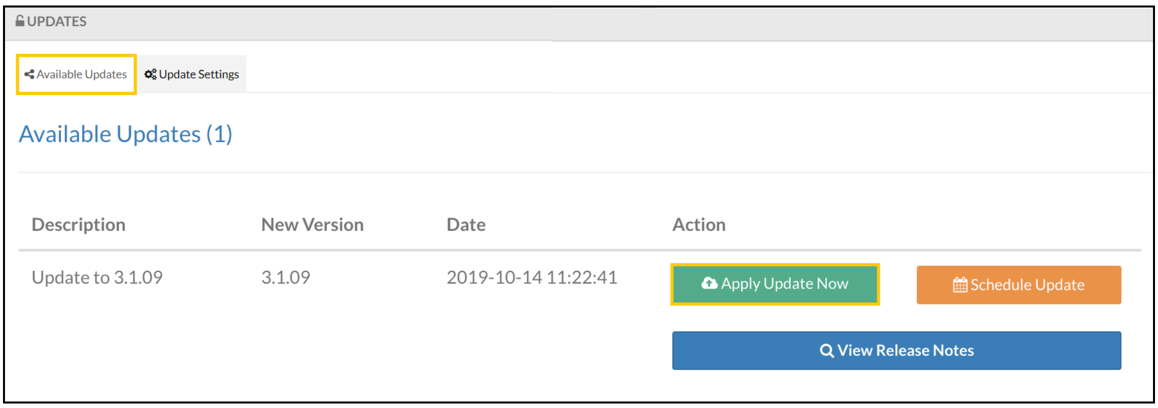
Available Updates

A list of available updates including the version number and date released are available from the **Available Updates** tab.

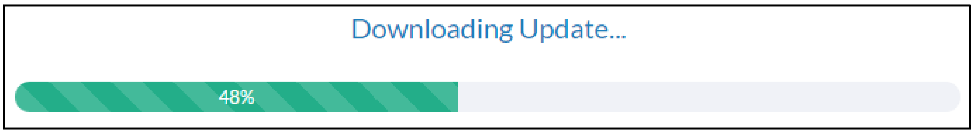


Apply Update Now

Click **Apply Update Now** to install the latest Kerauno update.



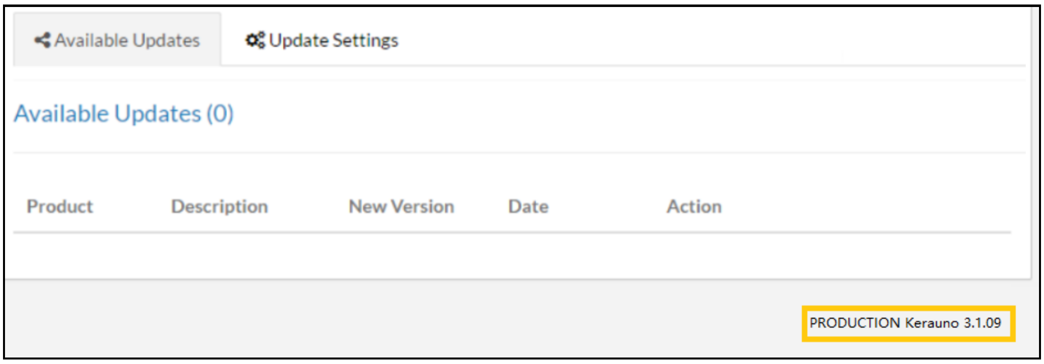
Kerauno will download the update, save a backup file to the local hard drive, apply the update, and also reboot. A progress bar reflects the processes current progress:



NOTE:	System downtime of 5-10 minutes may occur during an update installation. All current calls will be terminated and users are forced to log out of the Kerauno web interface. Therefore, we recommend System Administrators only apply updates outside of normal business hours.

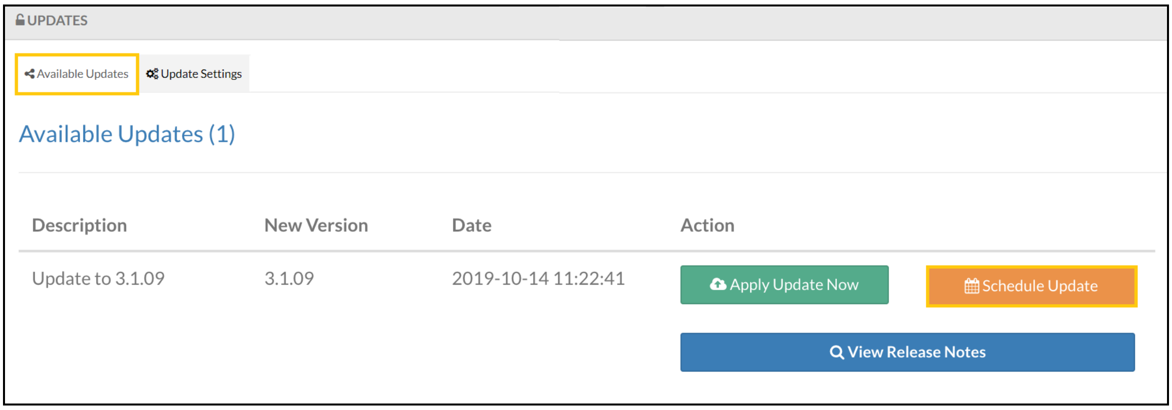
Verify Latest Update

Once downloaded, verify the latest update is active by checking the version number in the bottom right hand corner of any page in the Kerauno interface as shown below:

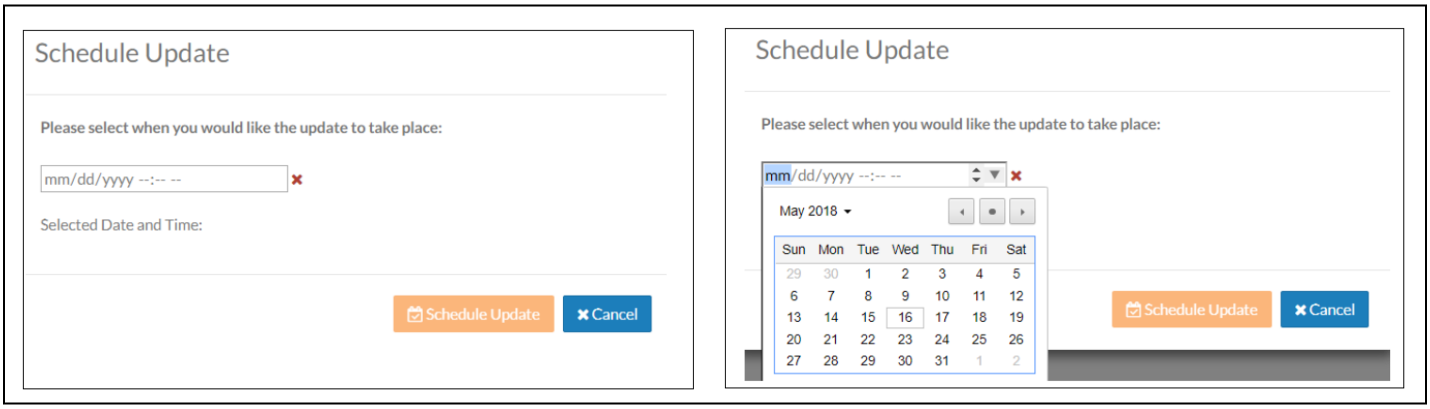


Schedule Update

Click **Schedule Update** to set a specific date and time for the update to run.



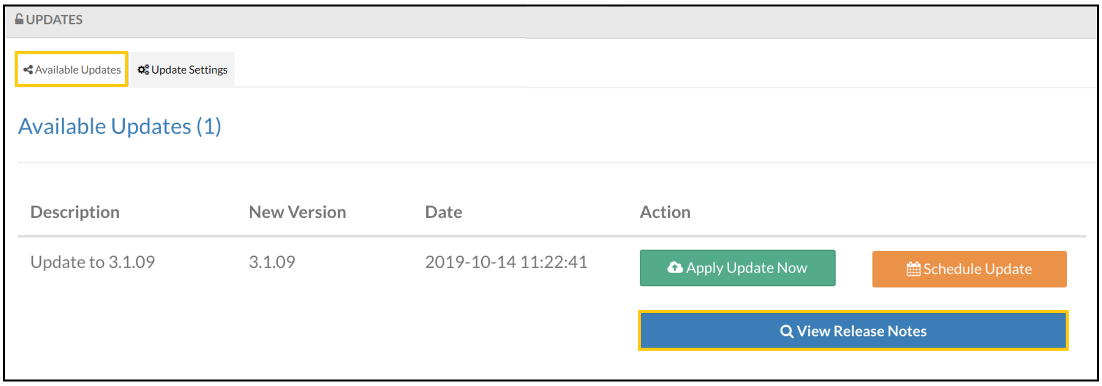
Enter the date and time in the **Schedule Update** popup or click in the date/time box to view a calendar drop-down and make your selection.



Click **Schedule Update** when finished.

View Release Notes

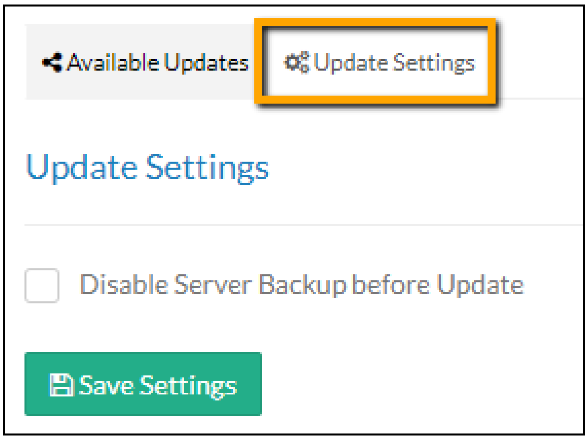
Click **View Release Notes** to review the Release Notes for the available updates.



Update Settings

Access the **Update Settings** tab to disable a server backup before updating to the latest Kerauno version.

Note: Additional download time will occur when a Server Backup is included in the update.



Network Address Translation (NAT) Settings

Last Modified on 07/11/2018 8:57 am EDT

This Network Address Translation (NAT) information applies ***only*** to On Premise instances of Kerauno and ***not*** to be used with Kerauno Hosted instances.

Purpose of NAT

NAT is a feature that allows the IP network of an organization to appear from the outside to use a different IP address space than what it is actually using. Thus, NAT allows an organization with nonglobally routable addresses to connect to the Internet by translating those addresses into a globally routable address space. NAT also allows a graceful renumbering strategy for organizations that are changing service providers or voluntarily renumbering into classless interdomain routing (CIDR) blocks. NAT is described in RFC 1631.

Beginning with Cisco IOS Release 12.1(5)T, NAT supports all H.225 and H.245 message types, including FastConnect and Alerting as part of the H.323 Version 2 specification. Any product that makes use of these message types will be able to pass through a Cisco IOS NAT configuration without any static configuration. Full support for NetMeeting Directory (Internet Locator Service) is also provided through Cisco IOS NAT. (*Purpose of NAT*. (December 18, 2011). IP Addressing: NAT Configuration Guide, Cisco IOS Release 12.4T. Retrieved July 03, 2018, from https://www.cisco.com/c/en/us/td/docs/ios-xml/ios/ipaddr_nat/configuration/12-4t/nat-12-4t-book/iadnat-addr-consv.html.)

How NAT Works

A router configured with NAT will have at least one interface to the inside network and one to the outside network. In a typical environment, NAT is configured at the exit router between a stub domain and the backbone. When a packet leaves the domain, NAT translates the locally significant source address into a globally unique address. When a packet enters the domain, NAT translates the globally unique destination address into a local address. If more than one exit point exists, each NAT must have the same translation table. If NAT cannot allocate an address because it has run out of addresses, it drops the packet and sends an Internet Control Message Protocol (ICMP) host unreachable packet. (*How NAT Works*. (December 18, 2011). IP Addressing: NAT Configuration Guide, Cisco IOS Release 12.4T. Retrieved July 03, 2018, from https://www.cisco.com/c/en/us/td/docs/ios-xml/ios/ipaddr_nat/configuration/12-4t/nat-12-4t-book/iadnat-addr-consv.html.)

Pooled NAT

Pooled NAT is similar to PAT except you have the luxury of having a one-to-one mapping of addresses. In other words, you have just as many inside network clients as you do outside network IP addresses. You tell the NAT router the pool of IP addresses that are available, and each client receives its own IP addresses when it requests a NAT translation. The client does not get the same address each time it requests a translation; it merely gets the next available address from the pool. Figure 01 below is an illustration of a pooled NAT.

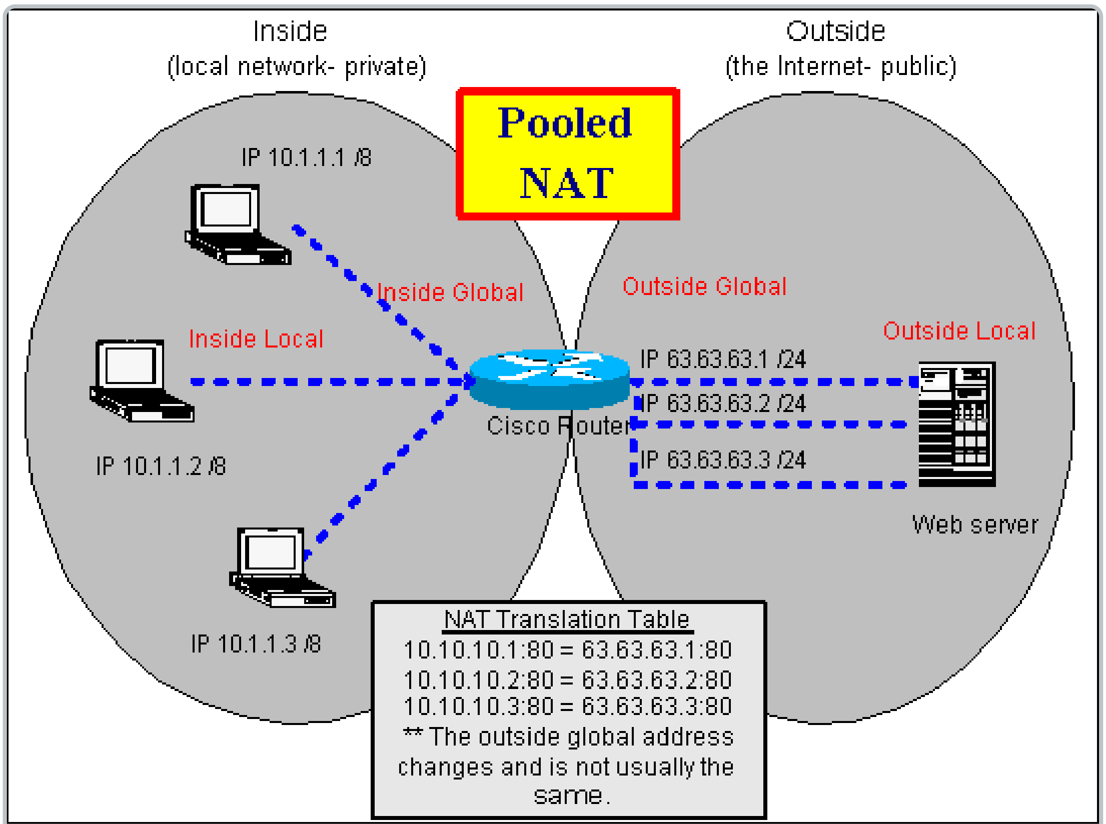


Figure 01 Pooled NAT Illustration

(Davis, David CCIE. "Pooled NAT". May 14, 2002. TechRepublic Website. Web. Retrieved July 03, 2018. Site: https://www.techrepublic.com/article/set-up-port-address-translation-pat-in-the-cisco-ios/.)

Static NAT

Static NAT is the simplest form of NAT. The most likely example is a mail server on the inside of a private network. The private network connects to the public Internet. In between the two networks, a router performs NAT. For a dedicated server, like a mail server, you would want a static (not changing) IP address. This way, every time someone on the Internet sends e-mail to the mail server, that server has the same public IP address. Refer to Figure 02 below for an illustration of a Static NAT.

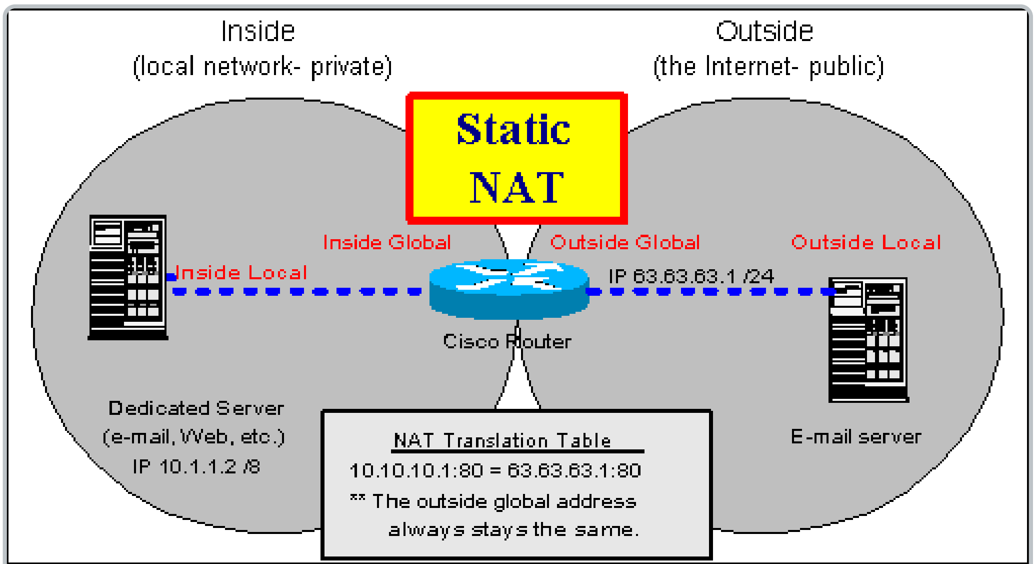


Figure 02 Static NAT Illustration

(Davis, David CCIE. "Pooled NAT". May 14, 2002. TechRepublic Website. Web. Retrieved July 03, 2018. Site: https://www.techrepublic.com/article/set-up-port-address-translation-pat-in-the-cisco-ios/.)

The NAT Settings panel for Kerauno is illustrated in Figure 03 below.

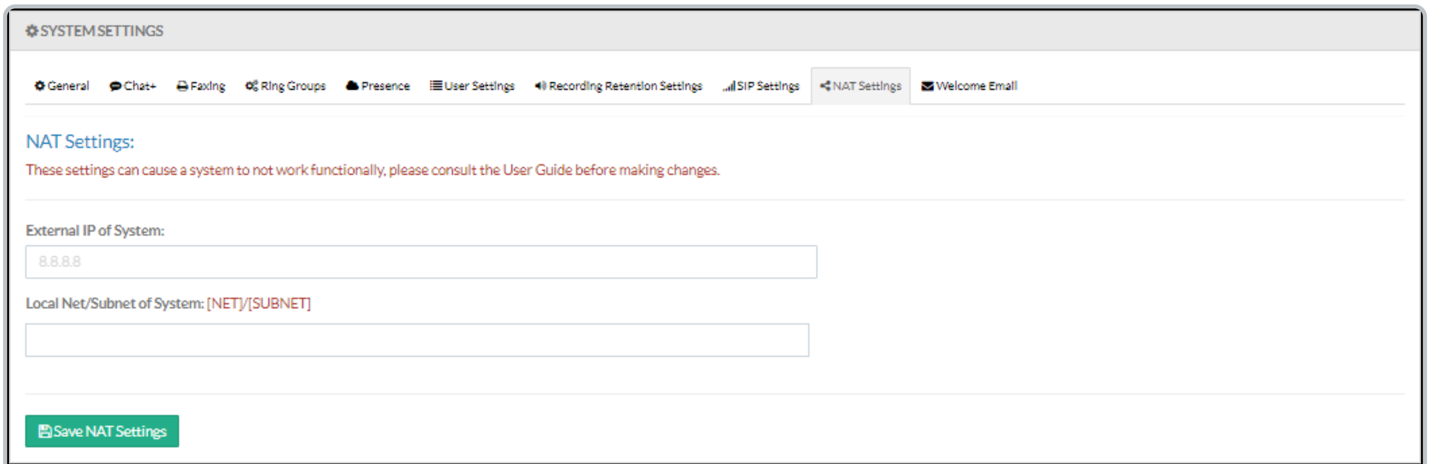


Figure 03 Kerauno NAT Settings Panel

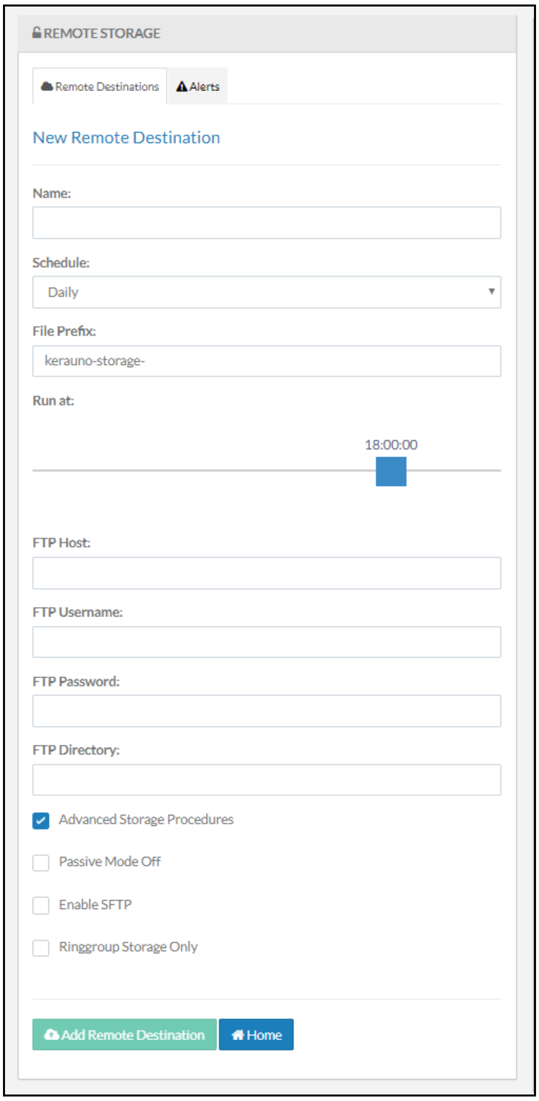
If you need more information or support please contact Kerauno Customer Care at 1-800-411-2942.

Remote Storage

Last Modified on 07/22/2019 2:45 pm EDT

Remote Storage allows System Administrators to send call recording files to an external destination (outside of the Kerauno server) via FTP. Any call recordings created in the past 30 days will always be stored locally on the Kerauno server. In order to retain call recordings outside of this 30-day time frame, a remote storage destination must be used.

To create a new Remote Destination, press the **Add Remote Destination** button on the main **Remote Destination** menu. The **New Remote Destination** screen will open and the Administrator will be prompted to enter the following information:



Name: Name of the Remote Destination (Ex. Call Recordings Server).

Schedule: How often to back-up information (Daily,Weekly,Monthly).

File Prefix: A prefix appended to the file name when the file is saved.

Run At: Slider to determine at what time backups will occur.

FTP Host: FTP Hostname or IP address of the remote destination (Ex. ftp.keraunouc.com).

FTP Username: Username of FTP server.

FTP Password: Associated password for **FTP Username**.

FTP Directory: FTP Subdirectory where files should be saved Ex. (/Kerauno/Call_Recordings).

After completing these fields, press the **Add**

Remote Destination button to save changes.

Advanced Storage Procedures: Click this checkbox to view additional settings including:

- Passive Mode Off:
- **Enable SFTP:** Click this checkbox to enable Secure Fire Transfer Protocol (SFTP).
- **Ringgroup Storage Only:** Click this checkbox and select applicable Ring Groups to store recordings.

When completed, select the Alerts tab from the main **Remote Storage** menu.

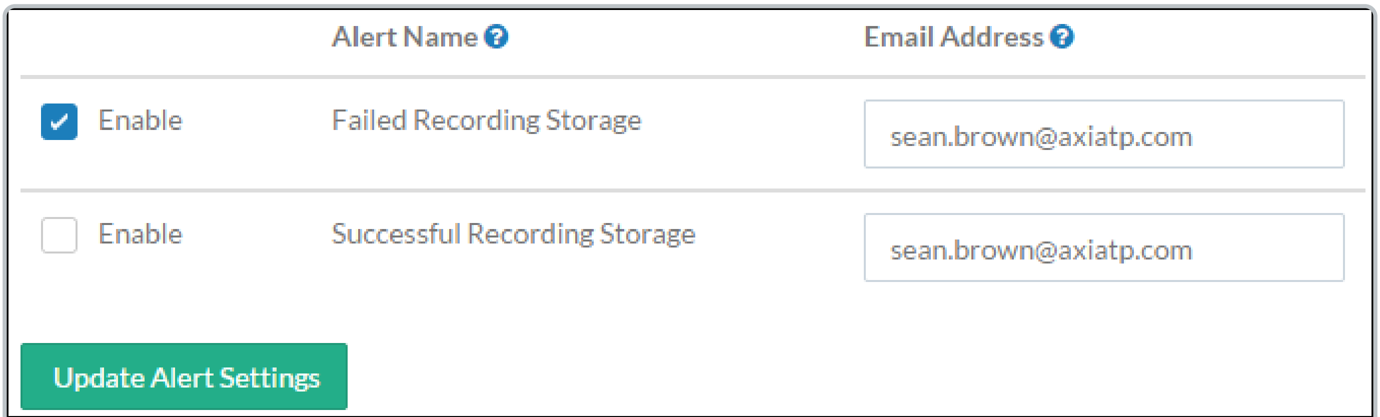


Figure 02: Remote Storage Alerts Tab

This tab allows the System Administrator to set email alerts for notification every time a successful or failed backup is completed. Enter an email address in the far right-hand column and click the checkbox to enable alerts for failed and/or successful recording storage.

Secure File Transfer Protocol

Last Modified on 07/22/2019 2:52 pm EDT

Secure File Transfer Protocol (SFTP) provides additional security when handling data transmission to offsite storage. This option is ideal for protecting Personally Identifiable Information (PII) as it transmits to 3rd party storage services, and is especially beneficial for those clients with strict data security policies, including healthcare organizations or financial institutions.

Note: An SFTP Server must be established by a Kerauno Admin before enabling this feature.

Complete the following steps to enable STFP:

1. Work with your IT team to create an SFTP Server.
2. Enable SFTP in Kerauno:

- Read about enabling SFTP for Kerauno Instances (Backup Restores) via Remote Destinations here.
- Read about enabling SFTP for call recordings via Remote Storage here.

System Health

Last Modified on 08/16/2019 2:33 pm EDT

The **System Health** menus display all relevant information about the current status of the Kerauno server and also gives administrators access to maintenance and system log information.

System Health Dashboard

From the System & Setings sidebar, click the **System Health** menu to display the main **System Health Dashboard** screen This dashboard shows important metrics on how the Kerauno hardware is functioning as well as some statistics about the Kerauno current configuration.

At the top of the screen, the number of departments, users, extensions, and devices that are currently built into Kerauno are listed. This data is pulled from the respective menus under the **Users & Devices** tab.

Figure 01: System Health Dashboard Statistics

Also listed on this screen, are a variety of charts describing the current utilization rates of various resources on Kerauno.

Each section is listed with a percentage chart that shows the total percent of current usage and a bar with exact details about the amount of resources being used (refer to Figure 02 for an exampoe),.

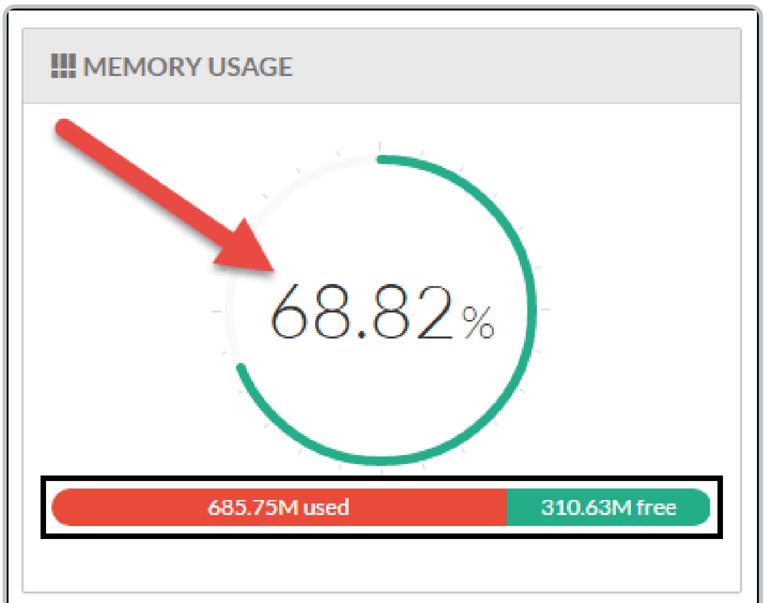


Figure 02: Usage Chart Example

Detailed statistics about the following system resources are displayed on this page:

CPU Usage: Monitors the amount of CPU processing power currently being utilized by the Kerauno server. The circle graph shows the percentage of total CPU currently being used, while the bar graph shows both used and unused CPU percentage.

Memory Usage: Monitors the amount of open system memory, or RAM, that is available on the Kerauno server. The circle graph shows the percentage of total memory that is currently being used, while the bar graph shows the amount of used and free RAM in megabytes (MB) or Gigabytes (GB).

Storage: Monitors the amount of hard disk space that is currently being used by the Kerauno server. This value encompasses basic data including configurations, device information, backups, etc. The circle graph shows the percentage of total hard disk space that is currently being used, while the bar graph shows the amount of used or free hard disk space in MB or GB.

Log Storage: Monitors the amount of hard disk space that is currently being used by the Kerauno server. The **Log Storage** value encompasses Kerauno data including: administrator logs, error logs, and call recordings. The circle graph shows the percentage of total log space that is currently being used while the bar graph shows the amount of used or free log space in MB or GB.

Swap Usage: Monitors the amount of swap memory (virtual memory on the hard disk) that is currently being used. The circle graph shows the percentage of swap memory that is currently being used, while the bar graph shows the amount of used or free swap memory in MB or GB.

Also listed on the dashboard is a bar chart with the number of total calls (incoming, outgoing, and internal) for the past 24 hours. Hovering over a time on this bar chart shows the number of answered and unanswered calls for that specific hour. For example, hovering over 10:00 AM show answered/unanswered call statistics for the period between 10:00 AM-10:59 AM.

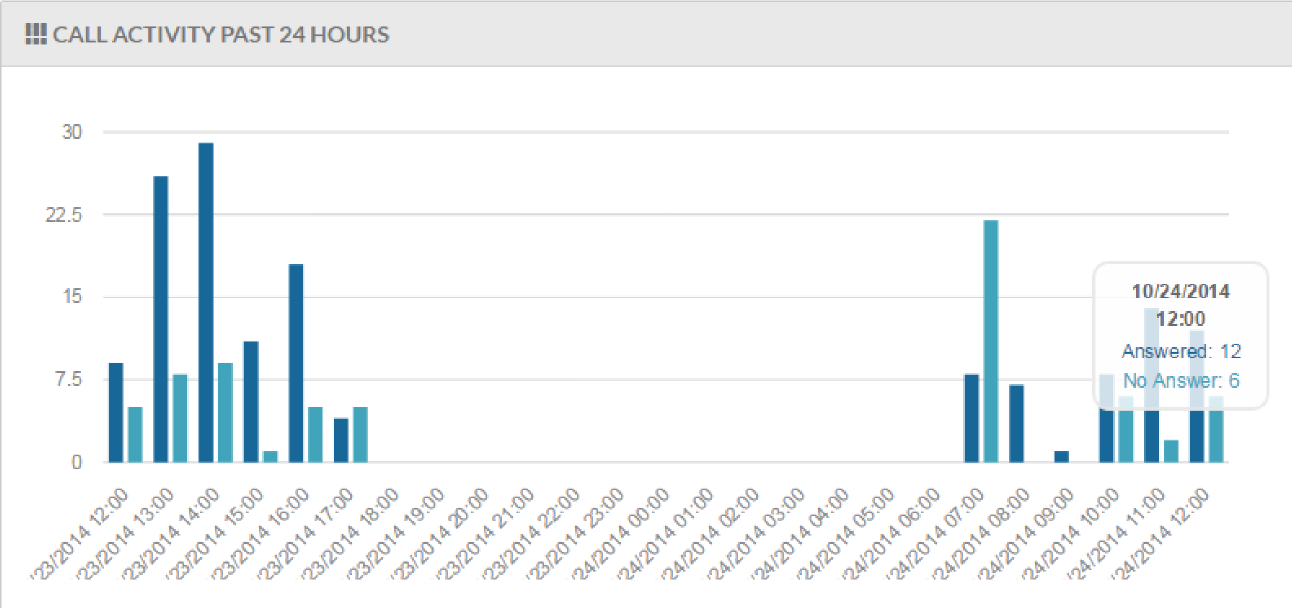


Figure 03: Total Calls Bar Chart

The final section of the **System Health Dashboard** displays the average bandwidth usage over the past 24 hours. This usage amount is a running average. All data into and out of the Kerauno server is monitored including phone traffic, downloaded CDRs and recordings, uploaded backup files, etc.

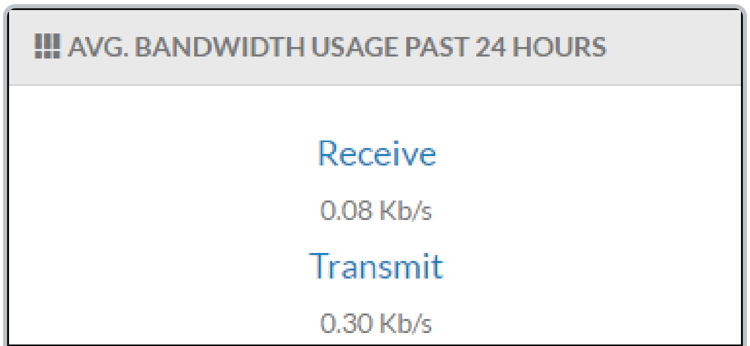


Figure 04: Past 24 Hours Average Bandwidth Usage

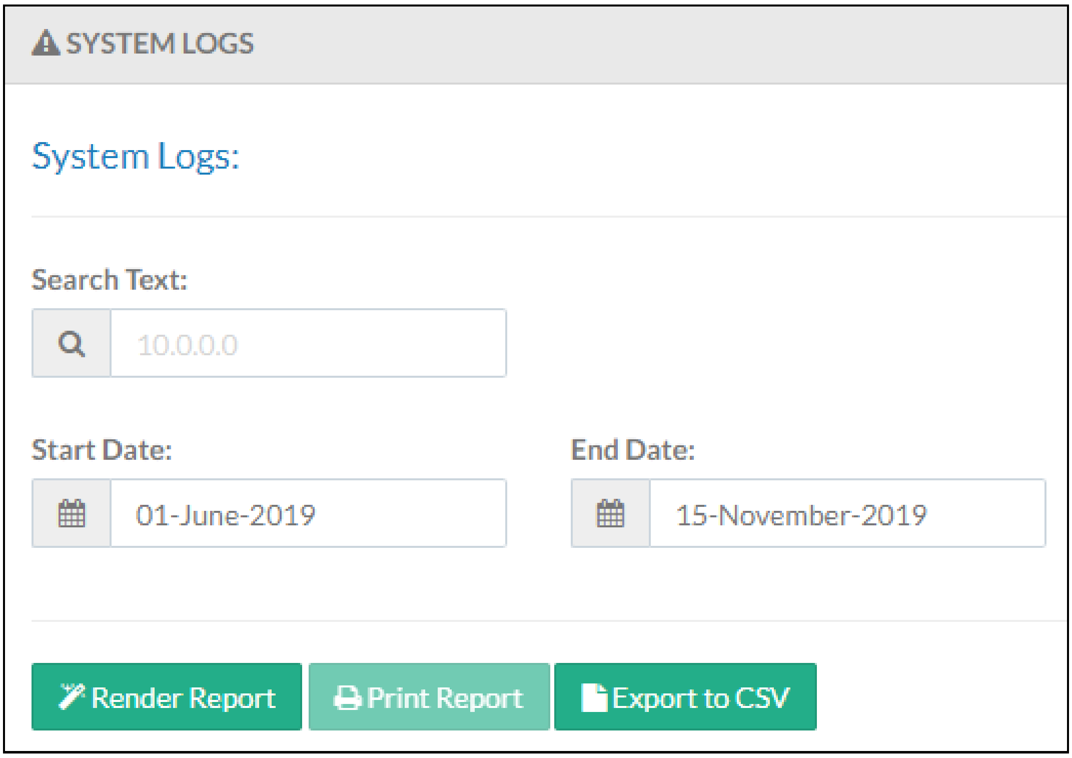
System Logs

Last Modified on 11/22/2019 3:46 pm EST

From the main menu, navigate to **System Settings > System Logs**.

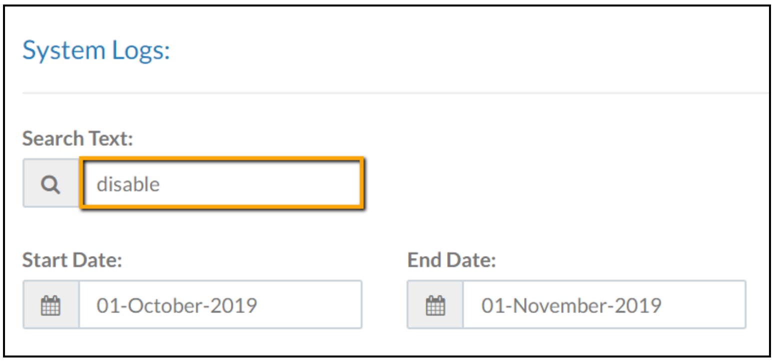
System Logs provide an audit trail of all activity within Kerauno. This tool is useful for monitoring user activity, tracking, or troubleshooting changes made to the system.

Main Menu

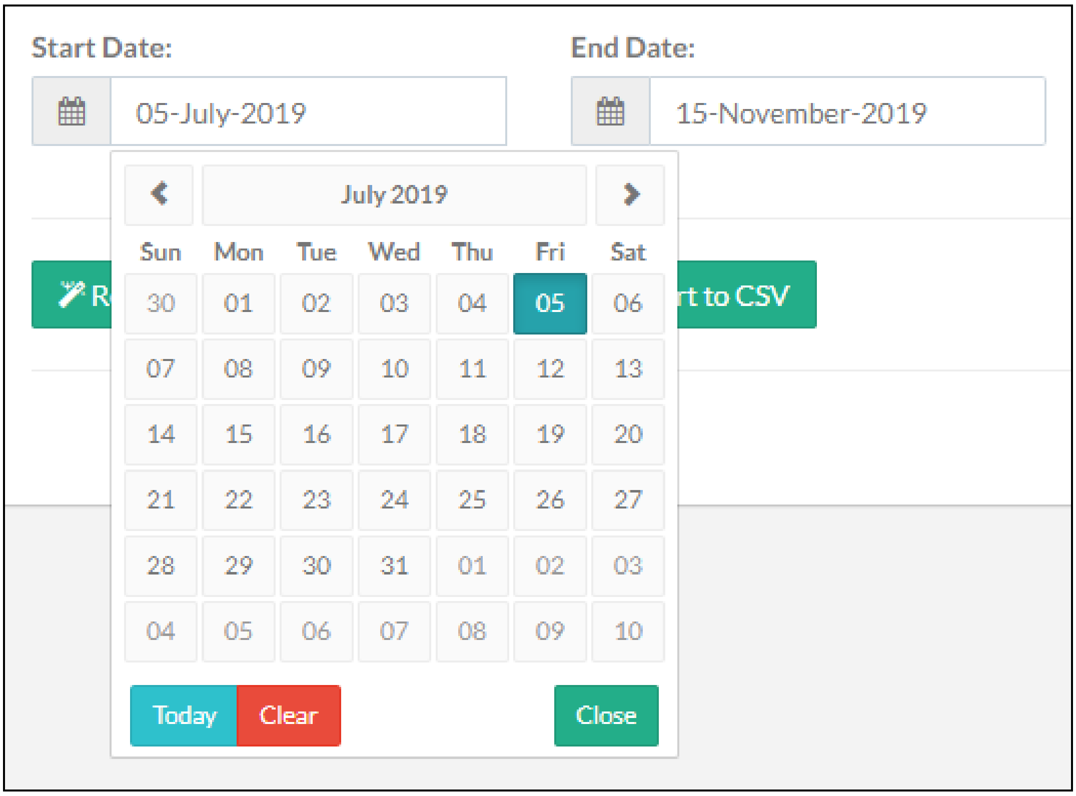


Render Report

Enter search criteria in the **Search Text** field to isolate report results. Examples: log in, disable, report.



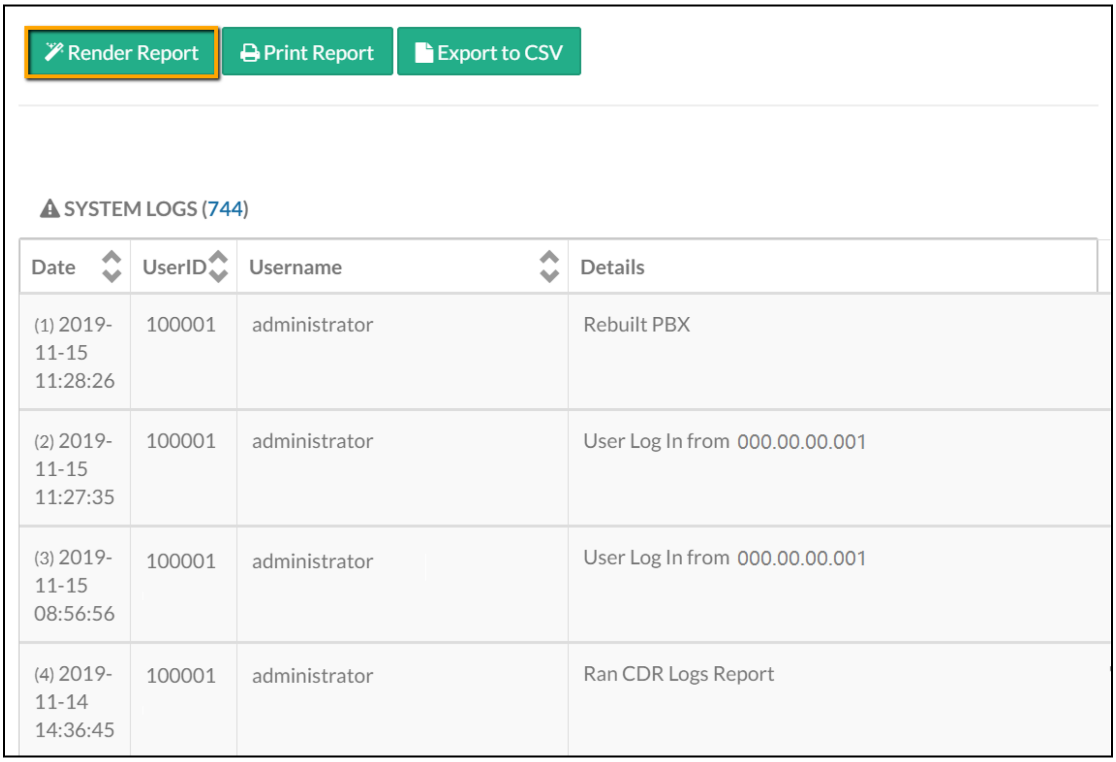
Set the **Start Date** and **End Date** for the report period.



Report Output Options

- Click **Render Report** to view the report onscreen in Kerauno. A report can be printed or exported to CSV once rendered on screen.
- Click **Print Report** to route to a local printer or download as a PDF.
- Click **Export to CSV** to use the data in Microsoft Excel or other data management tool.

Render Report Example



Date	UserID	Username	Details
(1) 2019-11-15 11:28:26	100001	administrator	Rebuilt PBX
(2) 2019-11-15 11:27:35	100001	administrator	User Log In from 000.00.00.001
(3) 2019-11-15 08:56:56	100001	administrator	User Log In from 000.00.00.001
(4) 2019-11-14 14:36:45	100001	administrator	Ran CDR Logs Report

System Services/System Maintenance

Last Modified on 05/25/2018 9:57 am EDT

This article describes the various system services and maintenance functionality available to system administrators.

System Logs

The **System Logs** tab contains logs of system configuration changes as well as time stamps of user logins to the Kerauno interface. This tab shows the last 100 events in the system along with date, time, user, and information about the exact change that was made.

Date	User	Details
2014-10-24 10:08:05	installer	User Log In from 10.14.201.3
2014-10-23 16:43:42	installer	Rebuilt PBX

Figure 05: System Logs

System Services

The **System Services** tab allows the System Administrator to view the status and resource usage of specific modules of Kerauno. If administrators are having a problem that is limited to a specific part of Kerauno, the **System Services** tab will tell them if a service is running properly.

Service	% CPU	% Memory	Status	Action
Kerauno Presence	0.10 %	27.50 %	✓	Restart
Automated Endpoint/Device Configuration	0.10 %	0.10 %	✓	Restart
Web Server	0.00 %	0.70 %	✓	Restart

Figure 01: System Services Menu

On this tab, the **Service** or name of the specific module in the Kerauno is listed along with the percentage of total CPU usage, the percentage of total memory usage, and a or column showing if that service is running properly. If a service has stalled or has become problematic, press the **Restart** button to restart that specific module.

If a service is showing and that service is not working properly, *do not* restart the service. Contact the AxiaTP support team immediately so that we may analyze and troubleshoot the issue. Also, if you do not know what a specific service is, *do not* hit the Restart button unless instructed to do so by an AxiaTP team member.

System Maintenance

The **System Maintenance** tab is useful if performing any type of hardware maintenance on the Kerauno server. From this tab, the system administrator can reboot the physical server hardware as well as shut down the Kerauno server for maintenance.

In order to complete a reboot of the system hardware, press the green **Reboot** button under the **Reboot PBX** heading. To complete a full shutdown of the Kerauno server, press the red **Shutdown** button from the **Shutdown PBX** heading. Pressing the shutdown button will end all Kerauno-related processes on the server and will allow the System Administrator to safely perform a hard shutdown and unplug the server from the server rack.

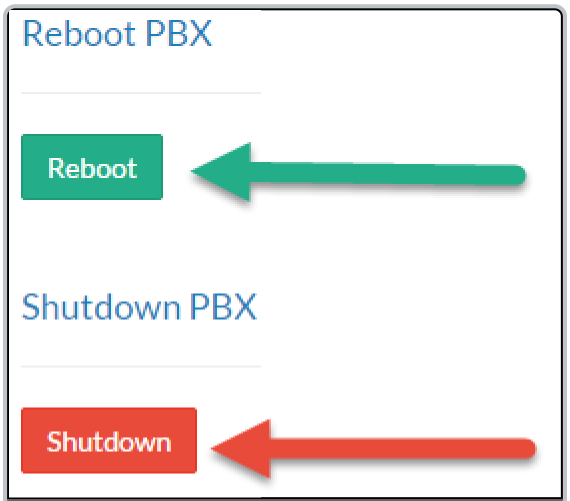


Figure 02: System Hardware Reboot Screen

Call Channels

The **Call Channels** tab allows administrators to view technical details about any specific call that is occurring within Kerauno in real time. The main purpose of this tab is to ensure that there are no “hung” or stuck calls occurring.

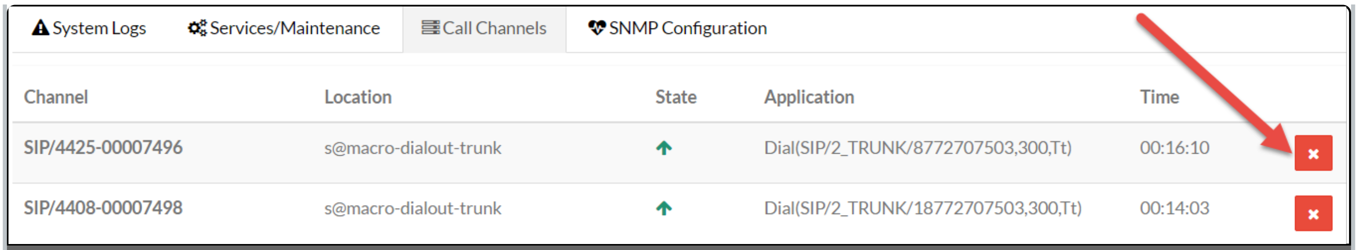


Figure 03; Call Channels Tab

The **Channel** column shows the extension that the call is currently connected to as well as a unique identifier. The **Location** column display if a call was dialed inbound/outbound, inbound via a ring group/queue, sent as an internal call, etc. The **Application** field shows the number dialed as well as trunk information. The **Time** field show the duration of the call.

To “kill” a call channel, press the button in the row next to the desired call. A confirmation is displayed that asks “Are you sure you want to kill this channel? It may influence other calls and may terminate more than one channel.” This message displays when a caller is on a three-way call or in a conference room; removing one of these channels will close all other channels connected to that call.

Press **OK** to confirm and terminated.the call.

SNMP Configuration

The Simple Network Management Protocol (SNMP) service allows administrators to monitor remote servers connected to a network, and share information back to a SNMP “Manager” device. If utilizing a hosted Kerauno solution from AxiaTP, hardware and network monitoring is handled by the Network Operations Center. If deploying a Kerauno solution “on premise”, SNMP is an easy way to monitor the Kerauno server’s status.

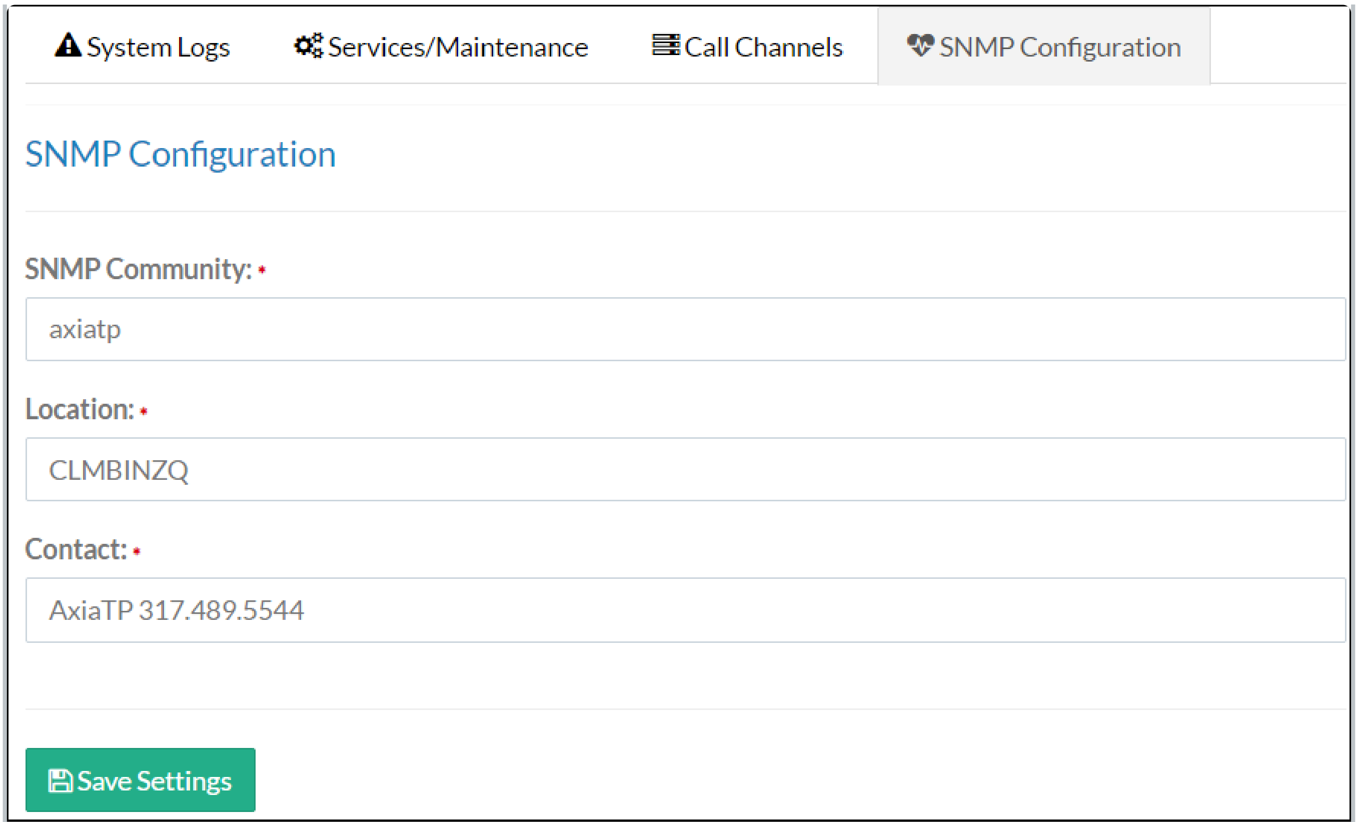


Figure 04: SNMP Configuration Tab

Kerauno acts as a SNMP agent that has the ability to transmit information about its current status back to the SNMP Manager device. There are three fields on this tab that must be completed.

SNMP Community: The SNMP Community string acts as a password that allows access to the Kerauno server's device statistics. If a SNMP Manager is requesting statistics/metrics from the Kerauno server, it must include this string in the SNMP request. Otherwise, the request will be discarded.

Location: Set the location of the physical server in this field This can be a rack and shelf number from a data center or a specific room in a building. (Ex: Building 3/Room222/Rack Unit 3) This information is useful for administrative purposes and is displayed to administrators via the SNMP client.

Contact: Set a contact person/department in this field; it is recommended that a phone number is included as well. This information is useful for administrative/troubleshooting purposes and is displayed to administrators via the SNMP client.

When these three fields have been completed, press the **Save Settings** button to save the SNMP Configuration to Kerauno.

Create a New Department

Last Modified on 05/25/2018 10:16 am EDT

The **Departments** menu allows the System Administrator to create departments within the Kerauno system. **Departments** are used to mimic a typical business structure, where a group of employees are considered a department and that department is assigned a manager.

To add a new department to Kerauno, select the green **+ Add Department** button on the far right side of the screen as shown in the figure below.

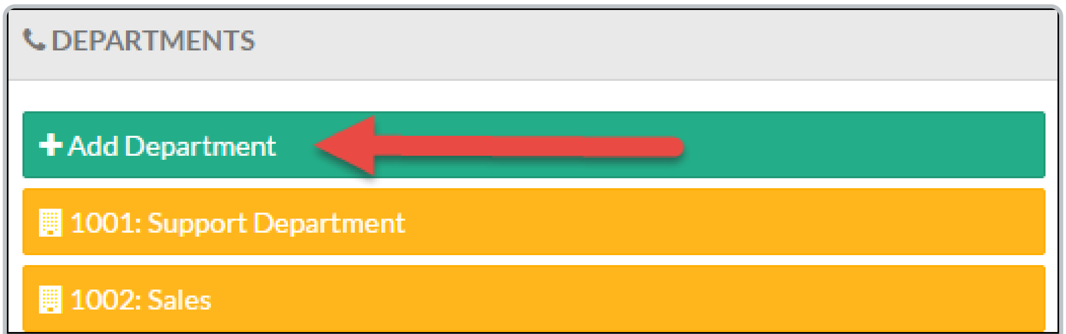


Figure 01: Departments Menu - Add Department

This will open the **Add New Department** menu. To modify an existing department, select the department from the yellow boxes in the **Departments** menu.

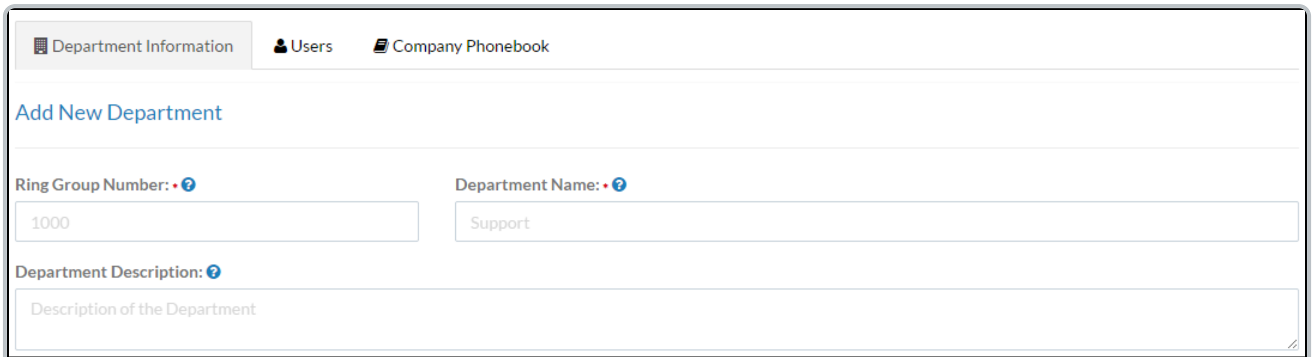


Figure 02: Add New Department Scree - Departments Tab

Ring Group Number

In the **Ring Group Number** field, specify the extension of the department ring group. This extension number can be dialed to call or page the entire department. By default, department ring groups are set to a **Ring All** ring strategy. This means that when an employee dials the department's ring group number, all employees' phones in that particular department will ring. These settings can be changed in the **Call**

Routing > Ring Groups menu after creating the department.

Department Name

Specify the name of the department so that it can be easily identified (Ex. Sales, Accounting, etc.).

Department Description

Enter an additional description or notes about this particular department.

Adding/Modifying Users and Managers in a Department

To add or modify users and managers in a department, select the **Users** tab on the **Department Management** screen.

From this screen, the System Administrator can add both managers and department members to a department. If users already exist in the department, they will be listed in the blue **Users:** box.

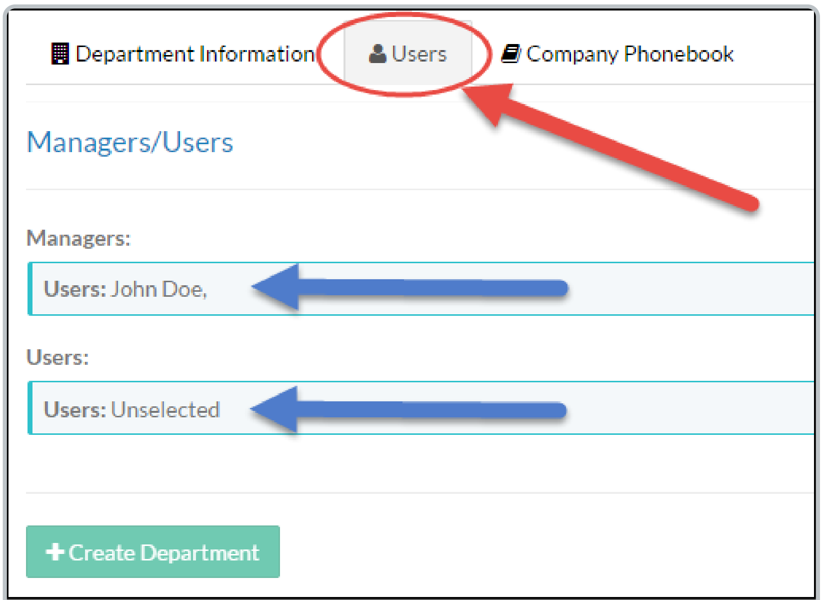


Figure 03: Department Management Screen - Users Tab

To add a new user or manager, click inside the light-blue **Users:** box to create users or the light-blue **Managers:** box to create managers. This will open a pop-up with a list of all currently built users in the Kerauno system.

Figure 04: Current Users Pop-Up

In the far-left column of the pop-up, click to select the checkbox for any user to be placed into the department. There is no limit to how many users can be placed into a single department. When finished, click the blue **OK** button to add the selected users to the department.

NOTE:	Any users added under the **Managers** section will automatically be given **Department Manager** Permissions in the Kerauno web portal. **Department Manger** permissions will allow managers to access all additional reporting functions.

Phonebook

Clicking the 

button adds the Department to the company directory located under **User Panel > Phonebook**. The department name and number are visible to all employees logged into the user panel.

Delete Existing Department

Last Modified on 05/25/2018 10:17 am EDT

The **Departments** menu allows the System Administrator to create departments within the Kerauno system. **Departments** are used to mimic a typical business structure, where a group of employees are considered a department and that department is assigned a manager.

On the **Department Information tab**, press the **Delete Department** button at the bottom of the page to remove the department. A confirmation message warning that the department will be deleted is displayed. Press **OK** to delete the department and return to the main **Departments** menu.

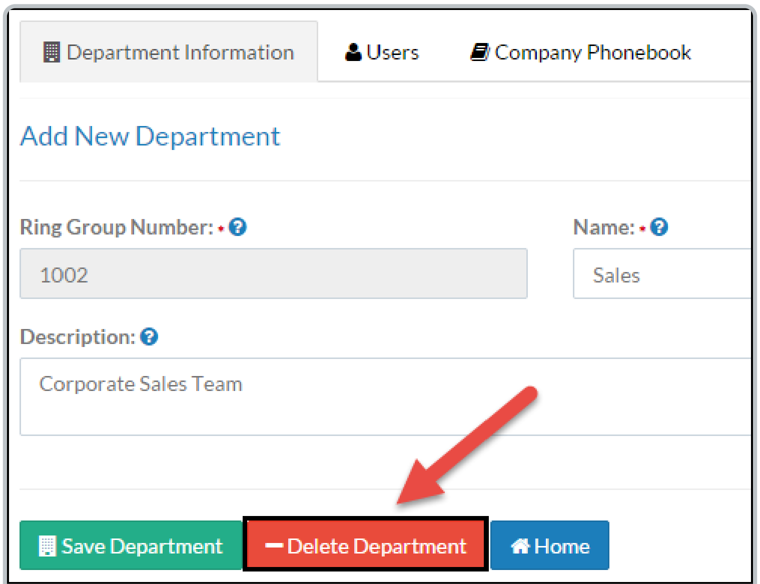


Figure 01: Department Information Tab - Delete Department Button

Departments Overview

Last Modified on 05/25/2018 10:15 am EDT

The **Departments** menu allows the System Administrator to create departments within the Kerauno system. **Departments** are used to mimic a typical business structure, where a group of employees are considered a department and that department is assigned a manager.

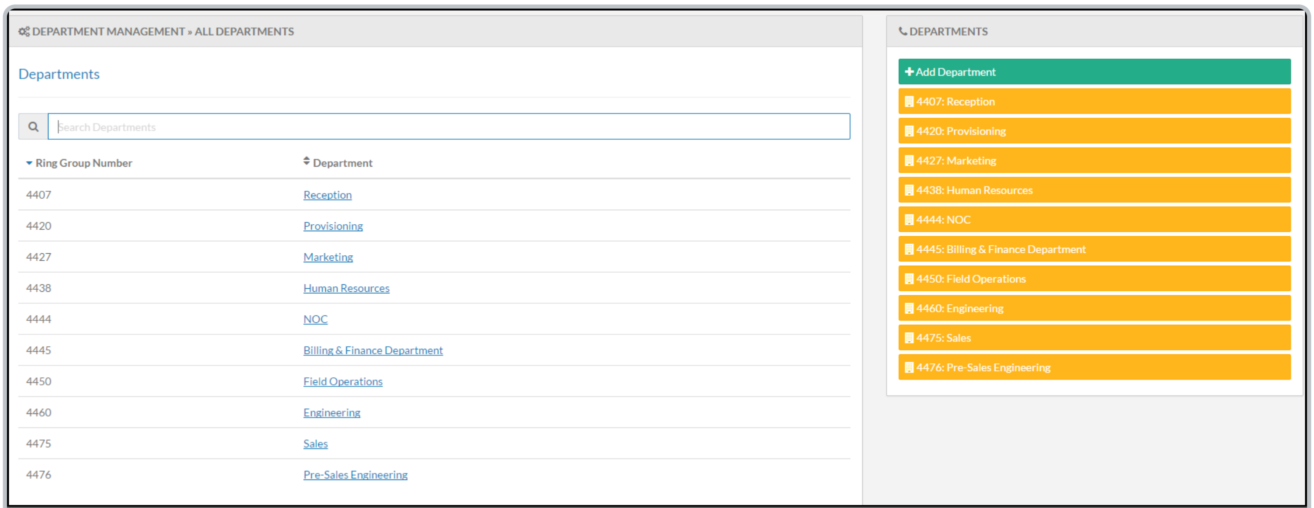


Figure 01: Departments Menu

There are many advantages to using departments.

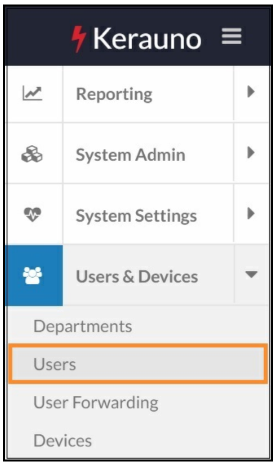
- In Kerauno, every department will also act as its own individual ring group. As a ring group, all members of the department can be called or paged by dialing the department's ring group number.
- Department Managers will have access to their department call statistics and recordings via the Kerauno user portal. Call records can be segmented so that managers can see all calls that came into their department for a given time period.
- Departments will show in the **Phonebook** menu in the user portal. Having the ability to segment by department in the phonebook makes it easy to find the extension for specific users.

Manage Users

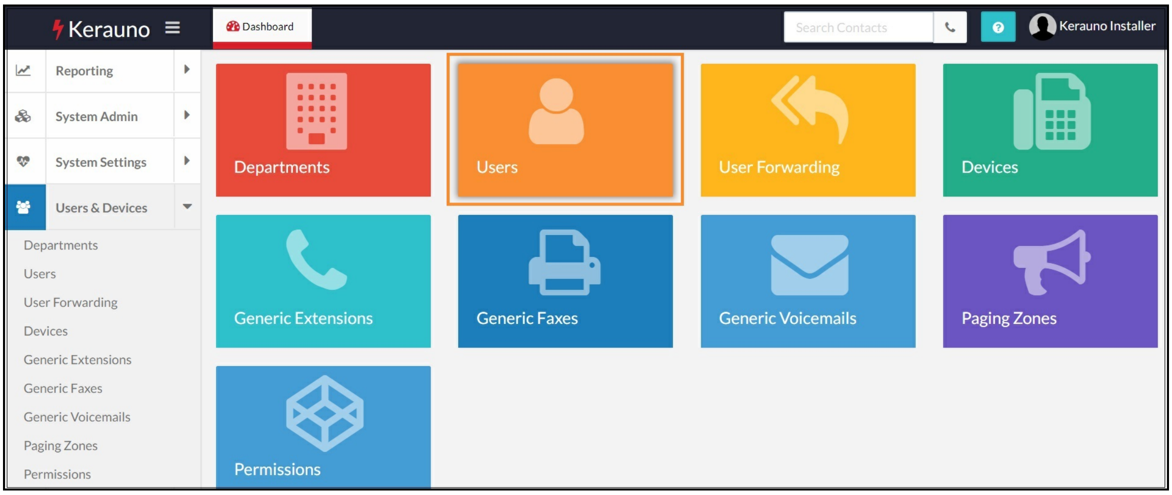
Last Modified on 04/11/2019 3:59 pm EDT

Each user is provided with a login to reach the Kerauno interface and a primary extension number. The **Users** menu allows administrators to build, modify, and delete user accounts and extensions.

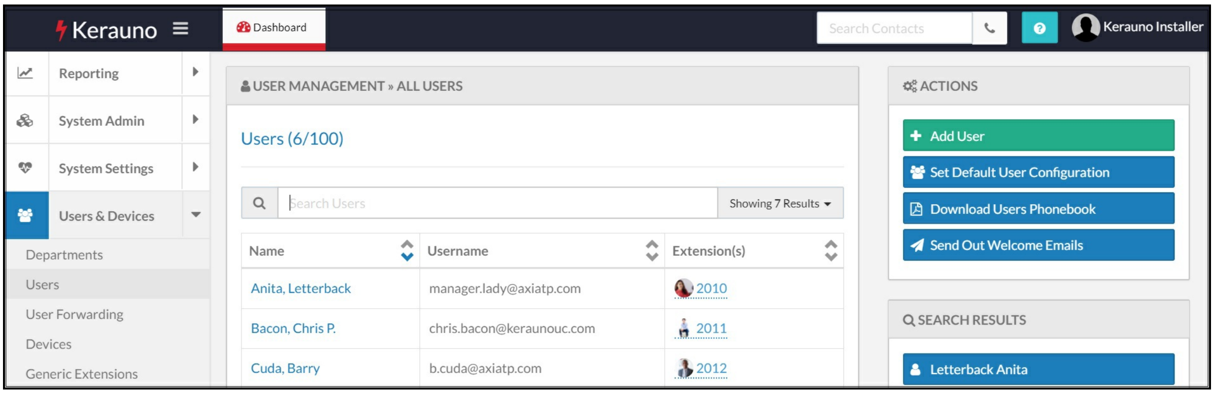
From the Kerauno homepage, click the **Users & Devices** drop-down, then select **Users** from the left-hand side of the screen.



There is also an orange **Users** shortcut icon in the center of the **Users & Devices** screen.



The main **User Management** screen contains a search bar and a table of all current users configured within Kerauno.

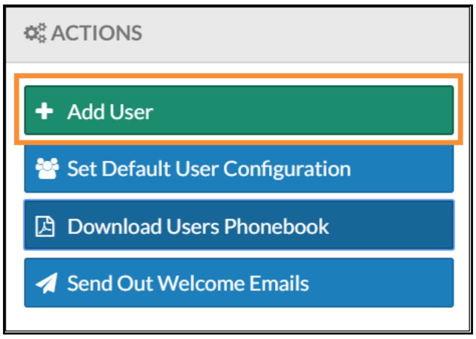


Organizing Users

Use the **Search** bar at the top of the menu to search for a specific user. User data can be sorted alphabetically by **Name**, **Username,** or numerically by **Extension** number. Sort icons are available for each column:

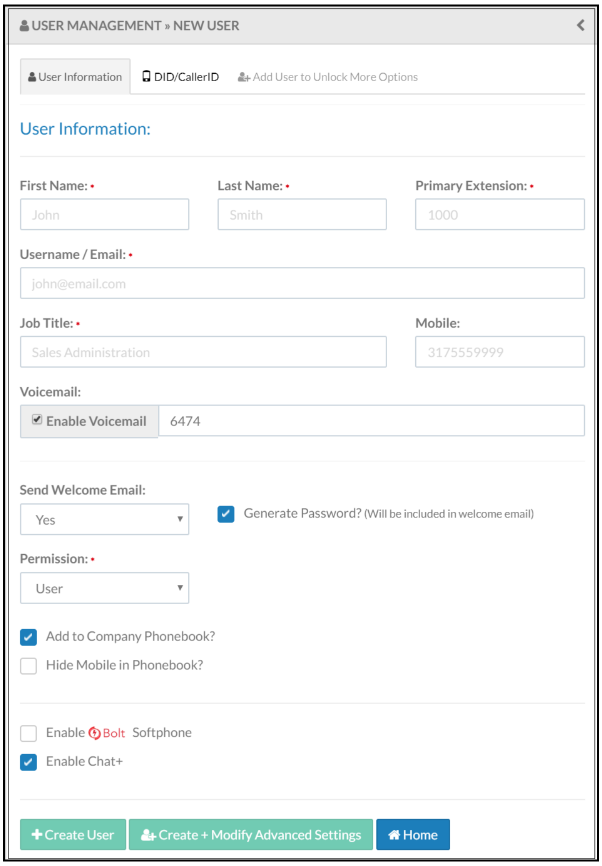
Add a User

Click the green **+ Add User** button on the far-right side of the screen to add a new user.



User Management Tab

The first tab that appears is the **User Information**.



Username/Email

A company email address is generally used as the Username/Email. Adding hundreds of users to Kerauno can be problematic for users with similar names. Duplicate usernames (meaning everything before the @ sign) are not accepted.

Example: John Kenneth Smith and John Edward Smith cannot both have a JohnSmith@ username.

Send Welcome Email

A Welcome Email is used to communicate account information to a new user including their username, password, extension number(s), and voicemail PIN. Select **No** from the drop-down menu when a welcome email is not necessary. Welcome email content is customized **here**.

Generate Password

The **Generate Password?** checkbox is active by default and generates a password for the user to log into Kerauno. Upon login, the user is prompted to change the password.

To specify a password directly, uncheck the **Generate Password?** box and populate the password fields. **Note:** The Welcome Email does not contain passwords set by an Administrator and must be communicated separately.

Set Permission

By default, all newly created users are given the most basic set of permissions – **User** which includes all options under the **User Panel** including profile, voicemail, and the company phonebook. Use the drop-down menu to edit the permission level.

Phonebook

Click the **Add to Company Phonebook?** checkbox to make the user searchable.

Click the **Hide Mobile in Phonebook?** checkbox to prevent the user's mobile phone from appearing in the phonebook.

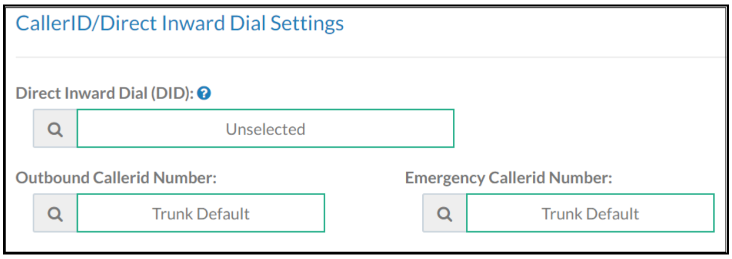
Enable Bolt

Click the **Enable Bolt Softphone** checkbox to enable Bolt. Once selected, an additional checkbox displays to **Enable Bolt as Primary**.

Click the **Enable Chat+** checkbox to enable Chat+.

DID/CallerID Tab

Use this tab to set Direct Inward Dial (DID) and CallerID information.



A DID number is the number used to reach a user externally. This number rings to the user's primary extension. The drop-down list is populated by the numbers stored in the **Number Manager**. When a DID is set for a user, this number dials the person directly, ringing to the user's primary extension.

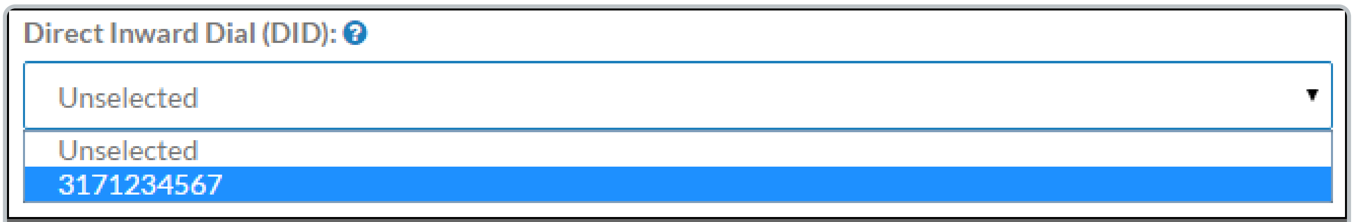


Figure 07: Direct Inward Dial Drop-Down

Outbound Caller ID Number

The **Outbound Caller ID** field configures which ten-digit number is displayed to the receiving party when dialing outbound from this extension. This drop-down list is also populated by the **Number Manager**. When **Trunk Default** is selected from the drop-down, the **Caller ID** of the dial plan used is sent. When no **Caller ID** is set in the dial plan, the **Caller ID** set in **System & Settings > Trunks** is displayed.

Emergency Caller ID Number

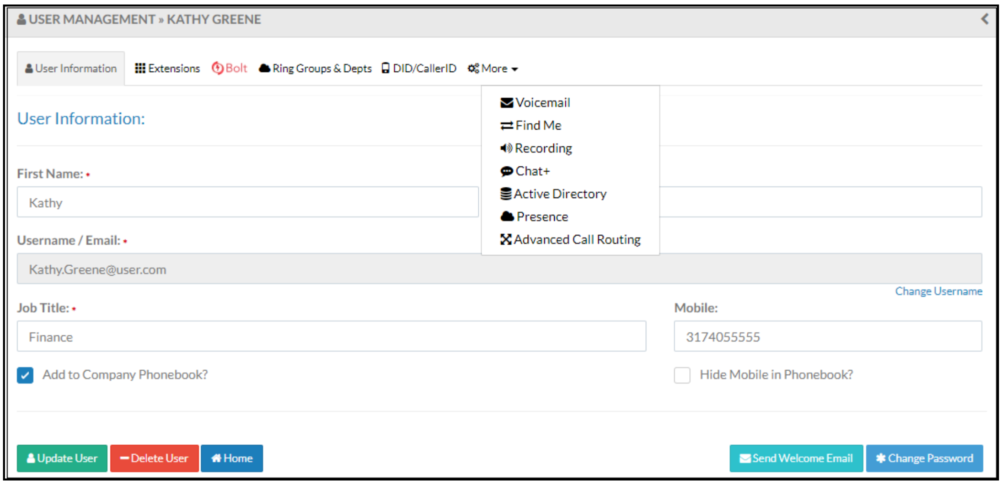
The **Emergency Caller ID** field allows administrators to choose which ten-digit number the system sends to emergency services when a user dials 911. When no emergency Caller ID is specified, the ten-digit number set in the **Emergency Dial Plan** is sent.

NOTE:	It is imperative to have a dial tone/telecommunications provider associate an extension's **Emergency Caller ID** number to the physical address of the user. The address on the carrier's file for the **Emergency Caller ID** number set here is sent to a 911 answering center to ensure a timely response. When it doubt about the service address provided to a number, please contact telephone carrier.

Once the **User Information** and **DID/CallerID** tabs are populated, an Administrator can click either **Create User** to quick add the user or click **Create + Modify Advanced Settings** to continue setting up the user's account.

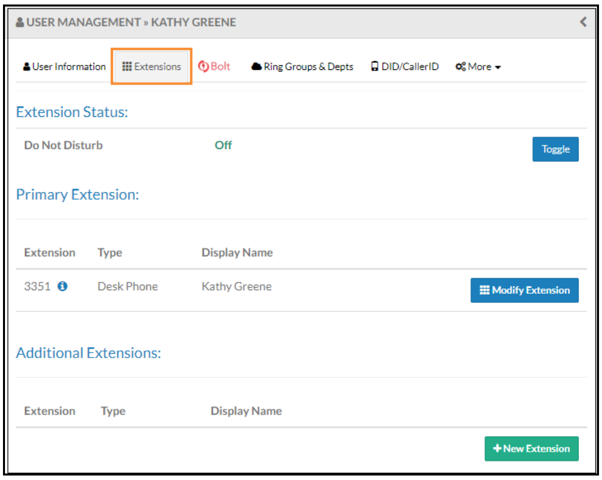
Edit Existing User/Create + Modify Advanced Settings

When **Create + Modify Advanced Settings** is selected after populating a new user with basic information, the complete **User Management** screen displays. This is the same screen where existing users are edited. Additional tabs appear at the top of the User Management screen.



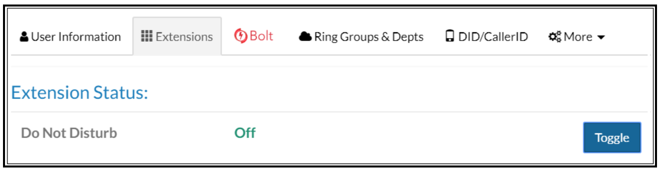
Extensions Tab

The **Extensions** tab is available once a user has been created and saved in Keruano. This screen provides a list of all primary and additional extensions for a specific user.



Extension Status

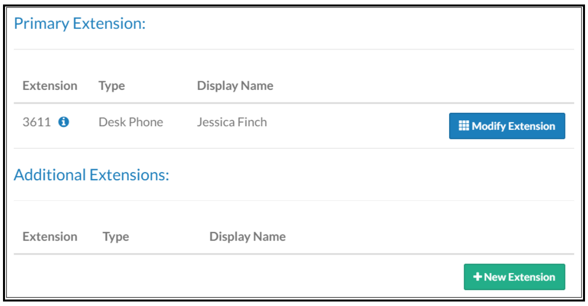
The **Extension Status** option allows administrators to enable **Do Not Disturb** (DND). To turn **DND** On/Off, click **Toggle** as shown above. When a user has **DND** active, no calls to the extension are received and incoming callers are sent straight to voicemail.



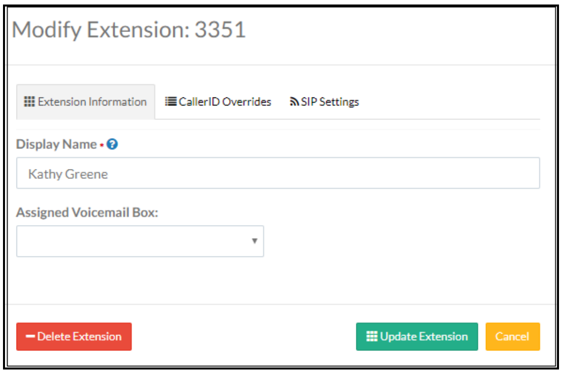
TROUBLESHOOTING TIP: When a user is not receiving calls and/or callers hear a **Busy** message, check the user's **DND** status.

Modify or Add New Extension

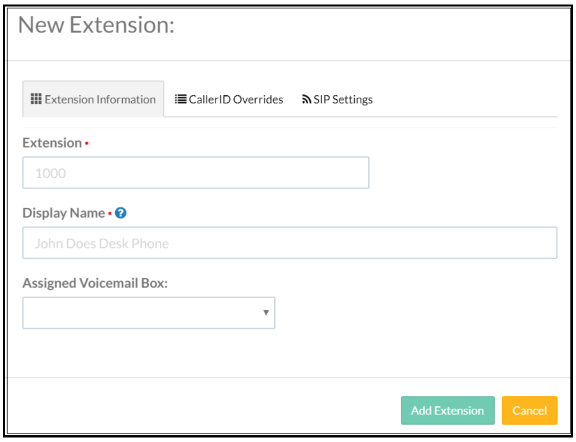
Each user may have up to five (5) unique extensions (one primary and four additional) dependent upon licensing. To modify the settings for a specific extension, press the **Modify Extension** button. To create a new extension, press the **+ New Extension** button at the bottom of the screen.



The **Modify Extension** pop-up includes options to **Delete** or **Update Extension** to save the extension information.



The **Add Extension** pop-up includes options to add an **Extension** number and an **Add Extension** button to save the new extension information.



Populate Extension Information

Extension Information Tab

Extension: Enter new extension number (for new extensions only)

Display Name: This is the name displayed on the LCD screen (if applicable) on this particular handset. The value entered into the **Display Name** field is also the caller ID shown when dialing internally from extension to extension.

Assigned Voicemail Box: Select from drop-down box.

CallerID Overrides Tab

Outbound Callerid Number: The ten-digit number displayed to the receiving party when dialing outbound from this extension.

Emergency Callerid Number: The ten-digit number the system sends to emergency services when a user dials 911.

Outbound CallerID Name Override checkbox

SIP Settings Tab

DTMF Mode: Select from drop-down box.

NAT?: NAT allows for **Network Address Translation** to be added to the configuration of the extension settings and the physical phone. When an end user experiences problems with one-way audio or is receiving a **Seize Failed** or **Reorder** message, try enabling the **NAT** option.

Qualify: Yes/No drop-down box.

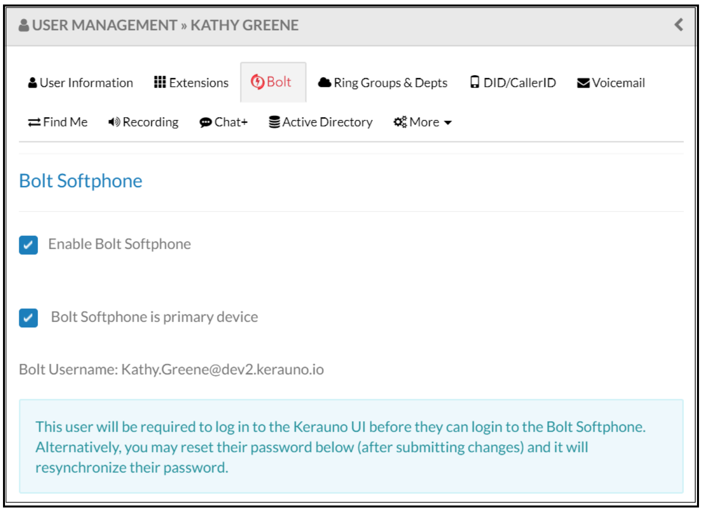
Qualify Frequency: Enter number.

Click either the **Update Extension** or **Add Extension** button to save changes.

Bolt Tab

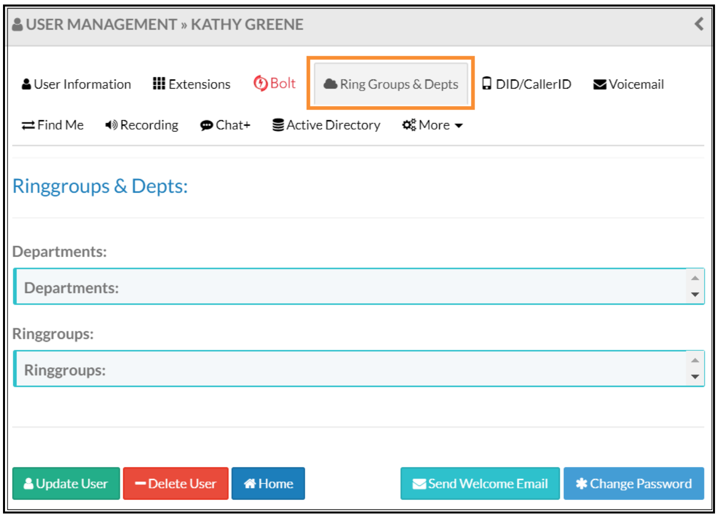
When the **Enable Bolt Softphone** checkbox is active, **Bolt Softphone is primary device** checkbox also displays.

If active, a Bolt Username is provided. The user is required to log into Kerauno before they can log into Bolt Softphone.



Ring Groups & Depts Tab

Assign users to Departments and Ring Groups.



Chat+ Tab

Active Directory Tab

Presence Tab

Advanced Call Routing Tab

Voicemail Configuration Tab

The **Voicemail IVR Locator** is the only setting within the **Users and Devices > Users** menu that is not available for a basic user to modify.

The **Voicemail IVR Locator** function allows callers to dial into a voicemail box then transfer themselves out of the voicemail box to another number or extension.

Example: The president of a company may have a message that plays whenever his/her voicemail box is reached, e.g.: “To leave a message, please stay on the line. If you’d like to make an appointment with my executive assistant, press 1”. When the caller presses 1, they are transferred to the executive assistant’s extension.

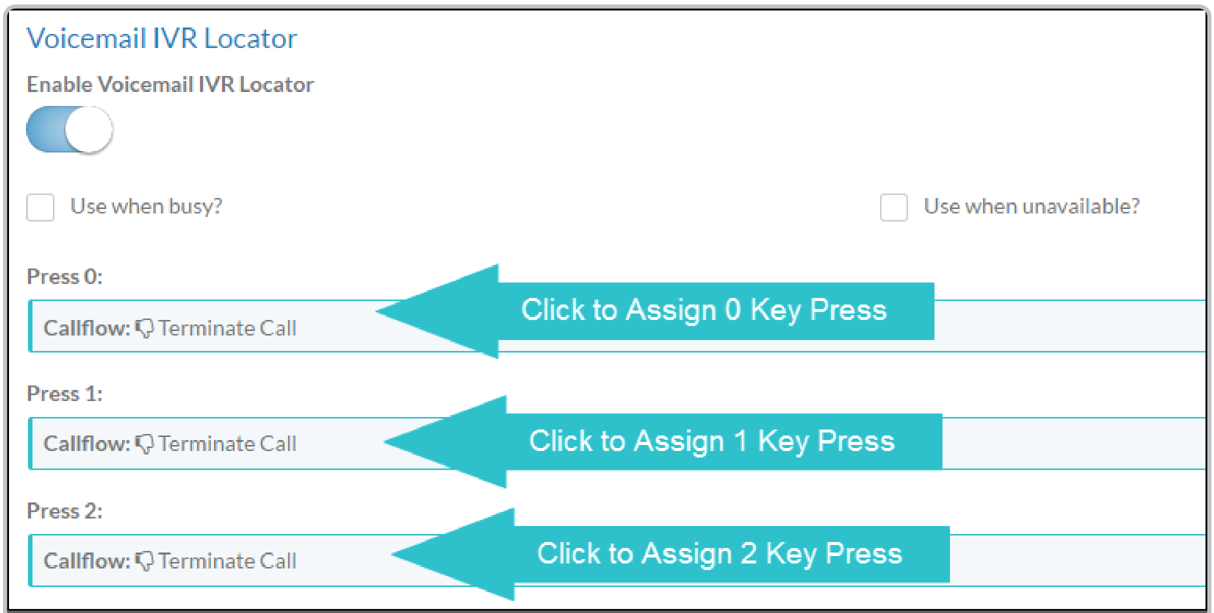


Figure 08: Voicemail IVR Locator

After enabling the **Voicemail IVR Locator** using the slider at the top of the section, a menu is displayed allowing the administrator to configure the IVR Locator through the following options:

- **Use when busy? Busy** occurs when the user is either on the phone or status is set to **DND** (Do Not Disturb). When enabled, the IVR Locator is active when the **Busy** greeting is played.
- **Use when unavailable? Unavailable** occurs when the phone is not picked up

and goes to voicemail. When enabled, the IVR Locator is active when the **Unavailable** greeting is played.

NOTE:	When using the same greeting for both **Busy** and **Unavailable** voicemail, both the **Use When Busy?** and **Use When Unavailable?** boxes should be checked.

The IVR locator allows the user to determine up to three (3) different locations which callers may be transferred to. Clicking inside of the light-blue box as shown in Figure 06 above allows administrators to assign a location to key presses for 0,1, or 2.

After clicking the light-blue box, a pop-up containing all call flow objects built into the phone system is displayed. This includes extensions, voicemails, ring groups, and external speed dials.

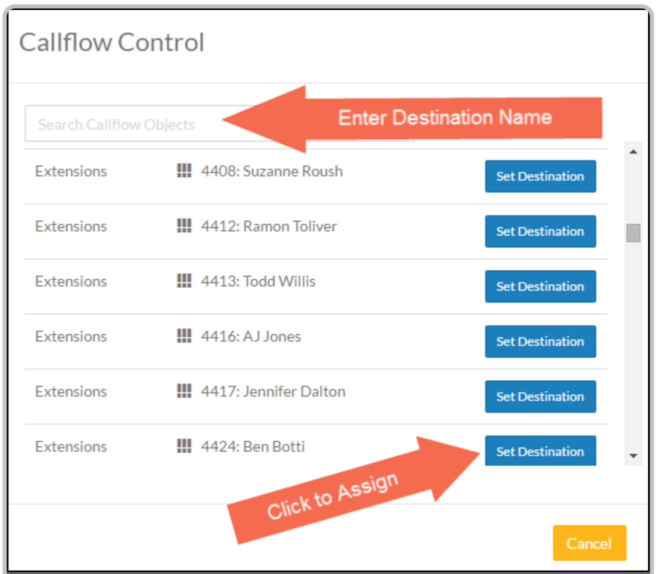


Figure 09: Callflow Control

Enter the name of the desired destination in the search bar at the top of the screen. When the correct destination has been found, click the blue **Set Destination** button on the right to assign the destination to the selected key press. Repeat this process for up to three key presses (Digits 0,1, and 2). When finished, click the **Update User** button to save changes to the IVR Locator.

Find Me/Follow Me Tab

Recording Tab

In the **User Settings** menu, a System Administrator can configure how Kerauno records both external and extension-to-extension calls. There are two settings to choose from - **Yes** and **Inherit**.

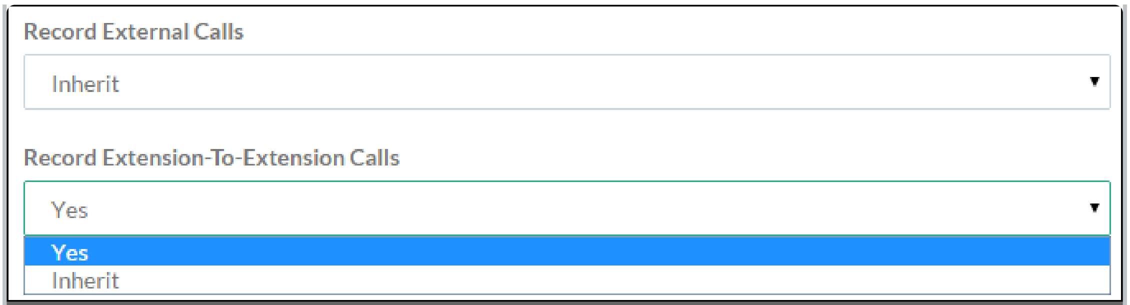


Figure 08: Dialog Box to Select Calls to Record

Setting these options to **Yes** records every single call originating from or received by this extension.

When **Inherit** is selected, calls that come through to the extension are recorded if the call passed through a section of the call flow tree that has recording enabled.

Example: When the extension is part of a call recording-enabled Ring Group. Calls that come through the Ring Group and ring this extension are recorded. A conference room with call recording enabled is another example.

Deleting a User

To remove an employee from the system entirely, use the **Delete User** function. If a user appears in a workflow, they must be replaced by another associate.

Access User Voicemail

Administrator and Installer level users have the ability to access any voicemail box within Kerauno which is helpful when an employee is out for an extended time or leaves the company.

From the **Users & Devices** menu select **Users**. The **User Management > All Users** screen is displayed.

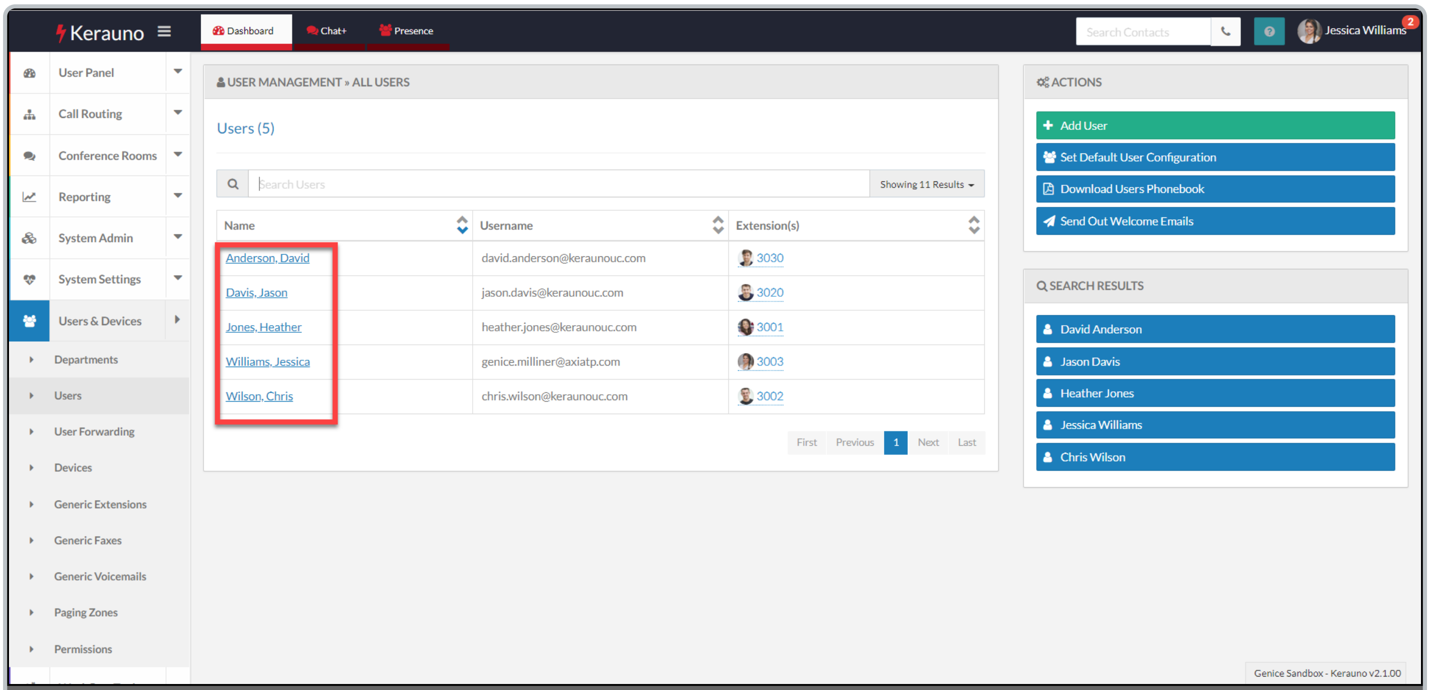


Figure 02 User Management > All Users

Select the user whose email you need to access. On the **User Management** screen for the selected user, scroll to the bottom of the page and select the **Voicemail** button under **Access Voicemail Box**.

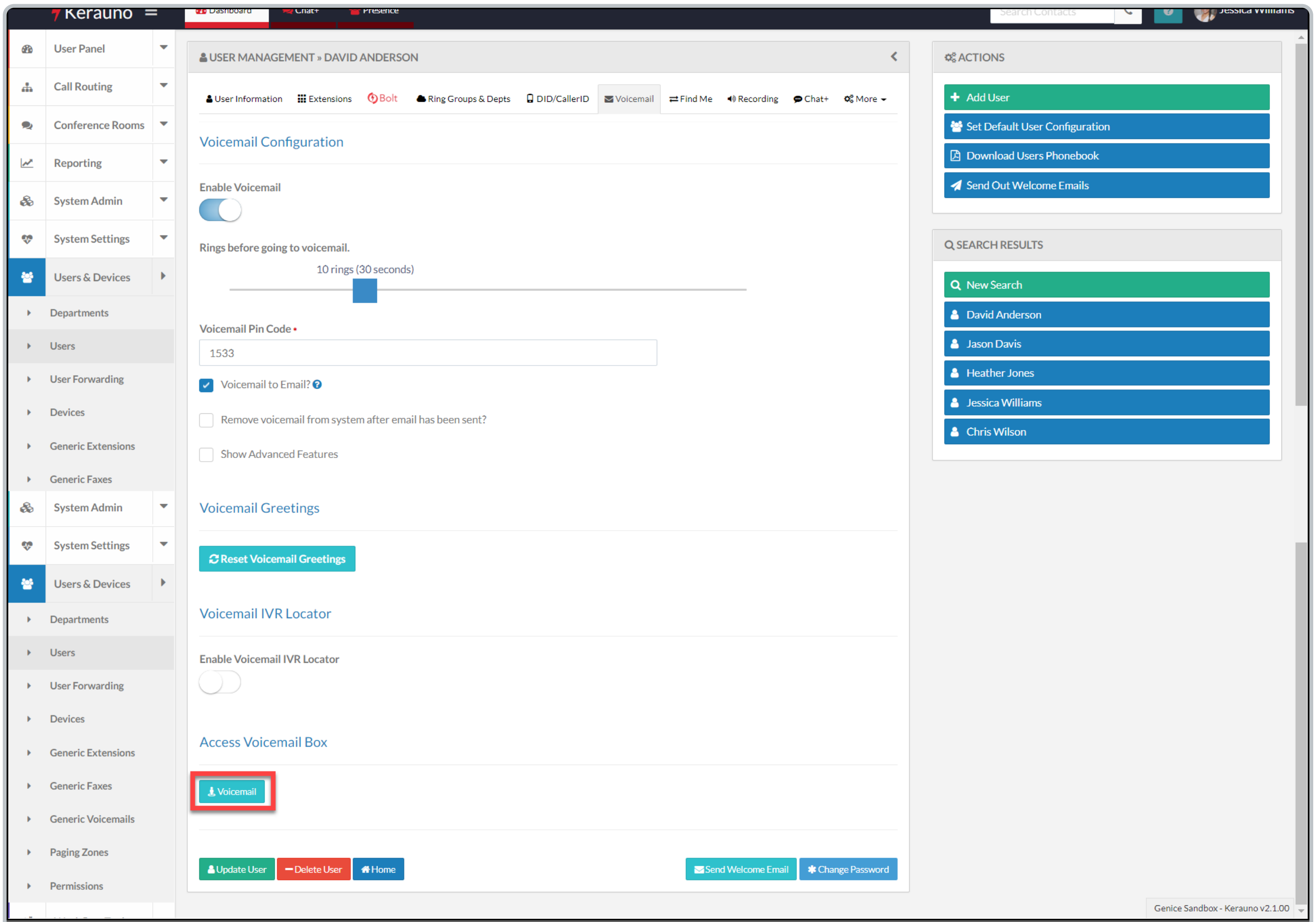


Figure 03 Access Voicemail Box

The User's Voicemail Box screen is displayed.

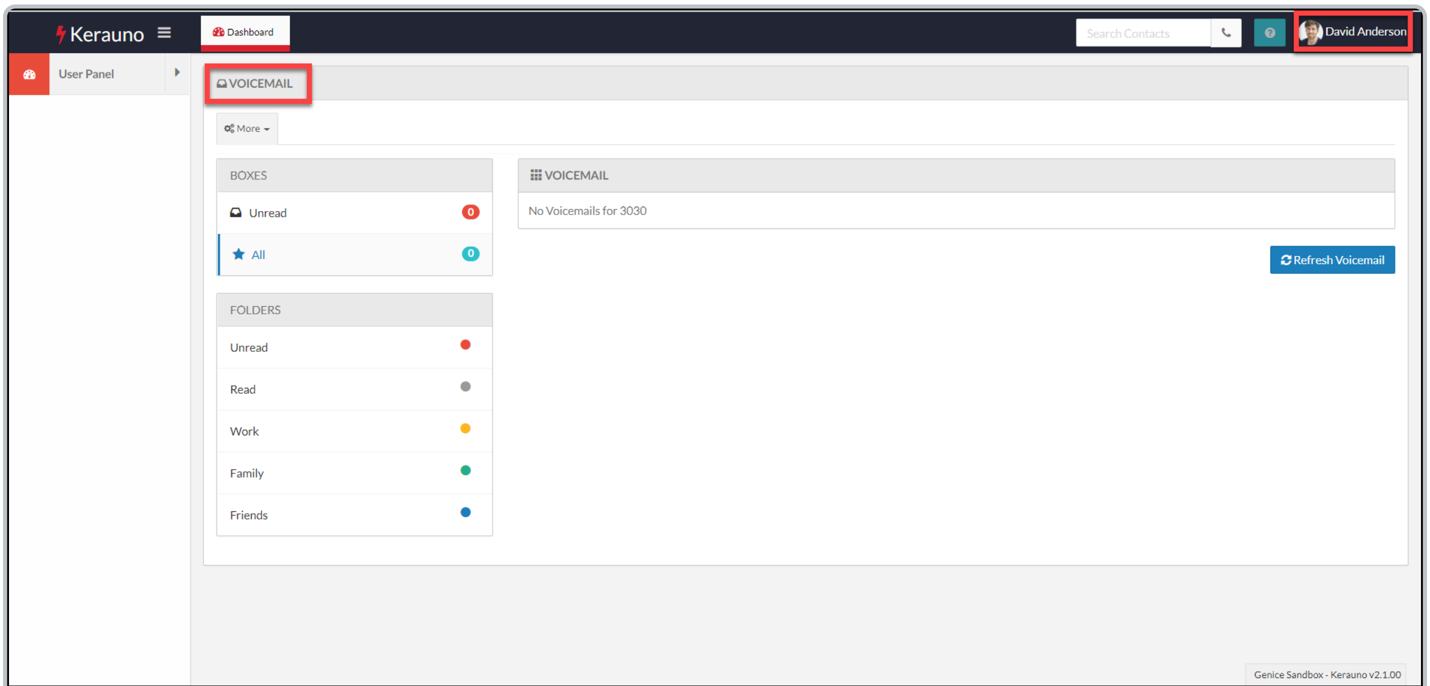


Figure 04 User Voicemail Box Screen

Enabling Voicemail Transcription

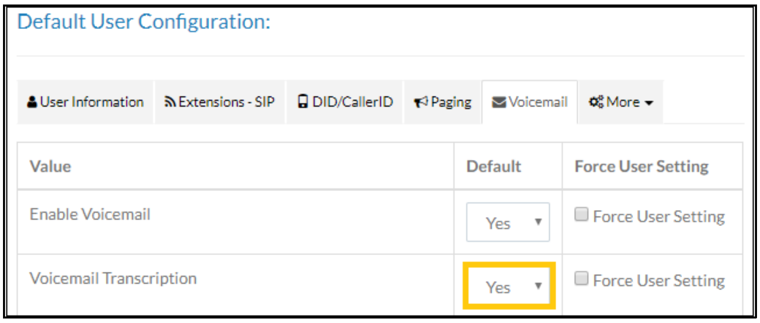
Last Modified on 10/01/2019 1:53 pm EDT

There are two options for enabling Voicemail Transcription:

Voicemail Transcription is available for users on 3.1 and higher, excluding premise enterprise customers.

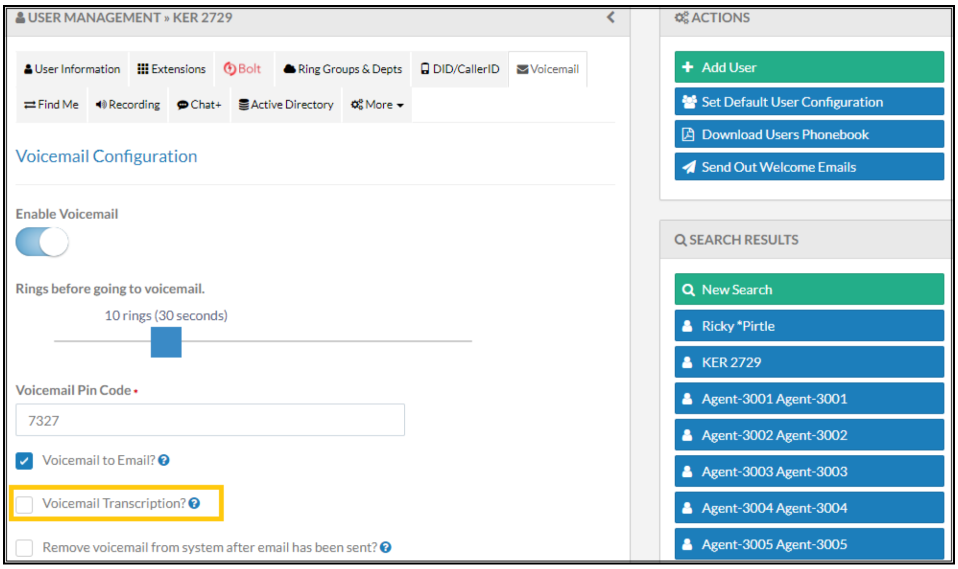
1. Update the Default User Configuration

Edit the transcription setting to YES through the Default User Configuration to ensure that all users added to a newly created SMS Flow have transcription enabled.



2. Update the Individual User Record

To enable transcription for specific users, an Administrator enables transcription from the Individual User record within Users/Devices > Users.



Before enabling Voicemail Transcription, it is important to recognize that this features is not HIPAA compliant. For that reason, transcription is off for all users by default.

Partners should carefully consider if transcriptions could contain sensitive content before enabling SMS for an organization.

Note: Review Premise-based Kerauno instance requirements to accommodate Voicemail Transcription here.

Troubleshooting

If a voicemail fails to transcribe, first check that voicemail transcription is enabled in the user record. If the transcription is not delivered after 10 minutes, contact your partner for support.

Note: Messages with no audio content or less than 5 seconds are not transcribed.

Devices

Last Modified on 08/16/2019 2:35 pm EDT

The **Devices** menu contains all relevant information about the devices connected to Kerauno. This includes information about the MAC Address of the device, the manufacturer and model of the device, the assigned user and extension, registration status, and IP address of the phone are displayed. This menu is also used to modify configurable keys on specific phone models. The option is also available to reboot one specific phone or reboot all phones configured to Kerauno.

The **Devices** menu allows **System Administrators** to view, manipulate, and troubleshoot any IP Phones or Paging Devices that are connected to Kerauno.

The **Devices** menu displays a list of every device that is connected to Kerauno.

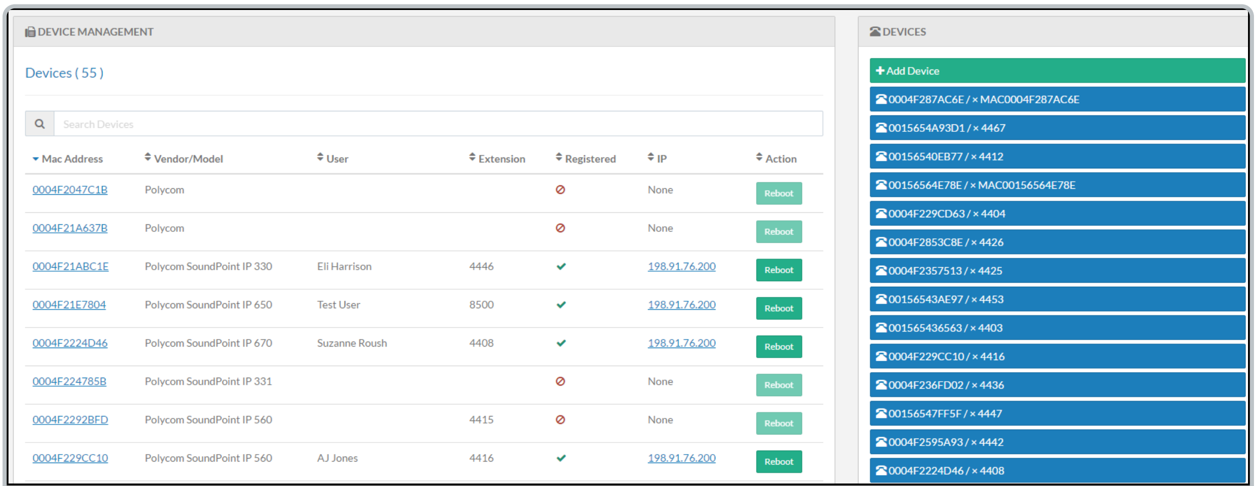


Figure 01: Devices Menu

At the top of the page next to the symbol, is a search bar allowing administrators to search for a device by MAC address, phone model, or extension. Select the next to the header of any column to sort by the **Registered** column.

A device's registration status is characterized by a or symbol. A successfully registered device will display a symbol, while an unregistered devices will show a symbol.

System Administrators also have the ability to reboot phones remotely using the green **Reboot** button in the far right hand column. This **Reboot** button is available for most Polycom SoundPoint Series and YeaLink phones. The option may be unavailable for older-model phones or generic brand IP Phones.

Kerauno allows administrators to modify the device settings and extension configuration for a specific phone via the **Devices** menu.

Click either the MAC address for the phone to be modified in the table, or select the phone from the blue device list on the right as shown in Figure 02 below.

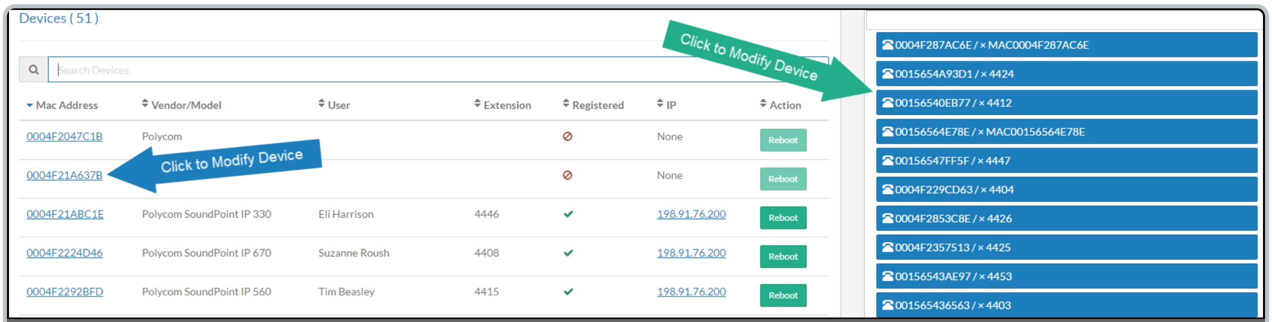


Figure 02: Devices Table

Once a specific device is selected, the **Device Information** page is displayed. This page shows the model, MAC Address, and currently assigned extension of the phone.

On the **Device Information** page, System Administrators have the ability to re-register a phone to another extension. To do this, press the light-blue **Extension** button as shown in the Figure 03 to the right.

A pop-up is displayed allowing the System Administrator to select the phone's new extension. Click the checkbox next to the desired extension to select it and press **OK**. Selecting **Update Device** reboots the selected phone and re-registers it with the new extension assigned.

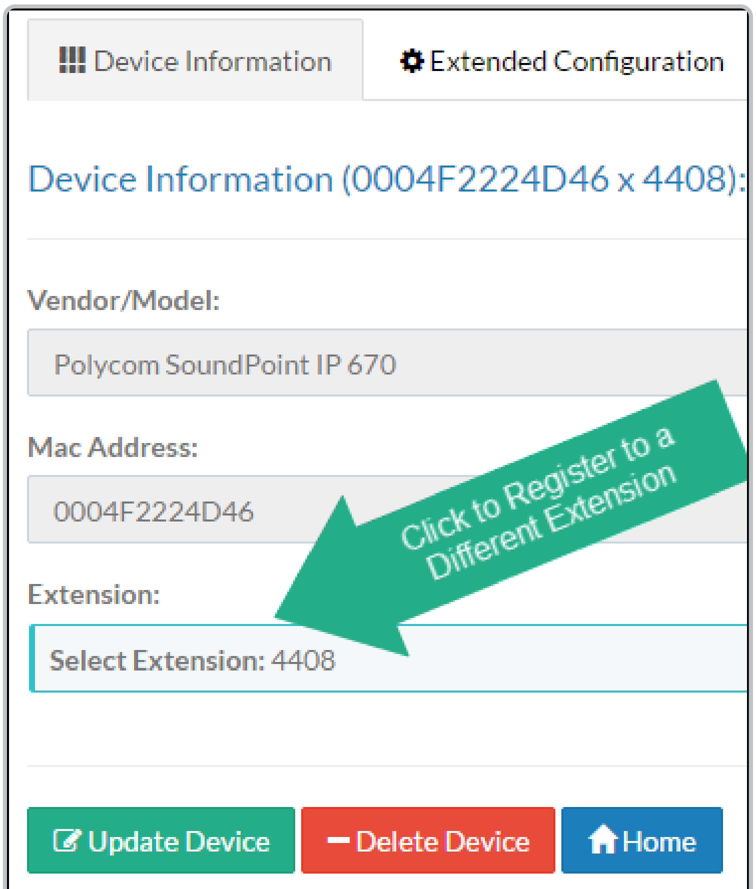


Figure 03: Device Information>Extended Configuration Screen

The **Extended Configuration** tab allows the modification of customizable keys on the phone and gives System Administrators the ability to change the time zone for employees dispersed geographically. The ability to modify customizable keys varies by model of phone, but can include “Soft” LCD keys, BLF keys, and Speed Dial buttons.

Figure 04: Device Informaiton Button Bar

The **Unregister Device** and **Delete Device** buttons are used to remove a device registration from Kerauno. The **Delete Device** button will completely remove the device from the **Devices** menu and Kerauno will no longer recognize the Device’s MAC address. This button is used to clean up old phones that are listed in the interface but are no longer in use. The **Unregister Device** button strips whatever extension is assigned to the phone and initiates a reboot. Kerauno will still recognize the device’s MAC address so the phone can be reassigned or moved elsewhere.

To modify the time-zone setting on a specific phone, select the desired time zone from the drop-down menu. To alter the BLF or speed dial keys, select the **+ Add Entry** button under the **BLF/Programmable Keys** heading.

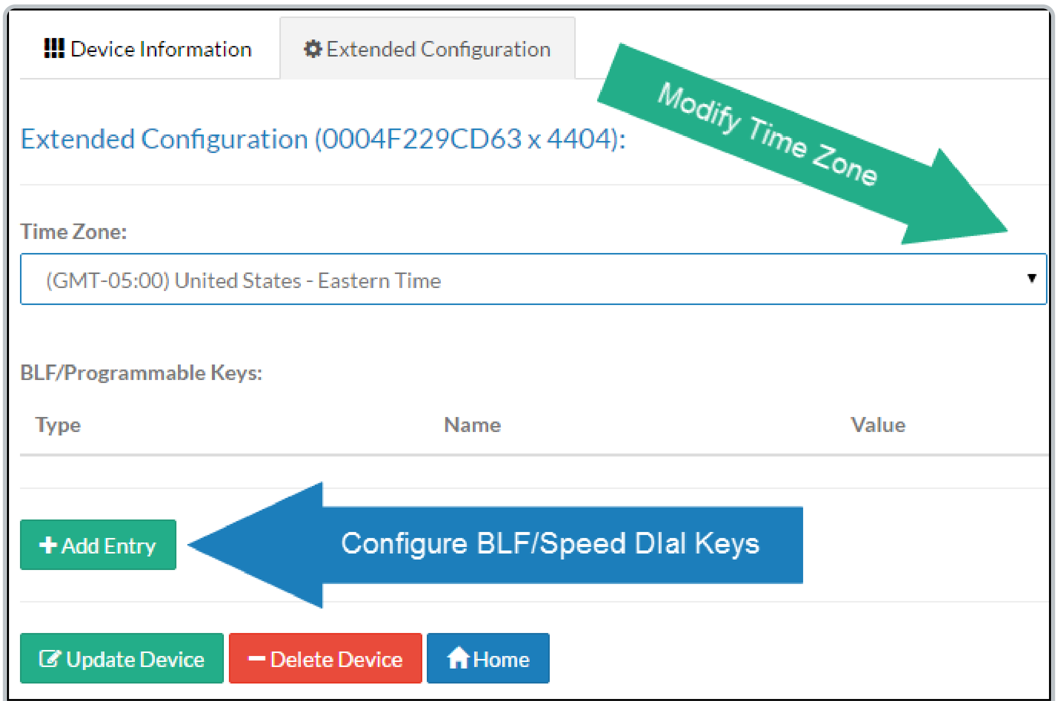


Figure 05: Device Information - Extended Configuration Tab

After selecting the **+Add Entry** button, the screen shows the types and settings available for the specific phone model that is selected. Press the **Type** of programmable key being configured.

Options include:

BLF (Busy Lamp Field): An LCD key typically on the far right-hand side of the phone. The LCD lights up green when the assigned extension is available; red when the assigned extension is on the phone.

Speed Dial: Button can be configured to instantly dial a telephone number, extension, or system code (such as ***74 - Ring Group Log-in** or ***86 – Voicemail**). Pressing this key will instantly call the configured destination.

Transfer: When set, instantly transfers the current call to the extension assigned. The transfer button may be configured to a specific extension. When the button is pressed, the current active call transfers to the set extension.

Parking Lot: Places a caller on **Park**, placing the caller into a **Parking Slot**.

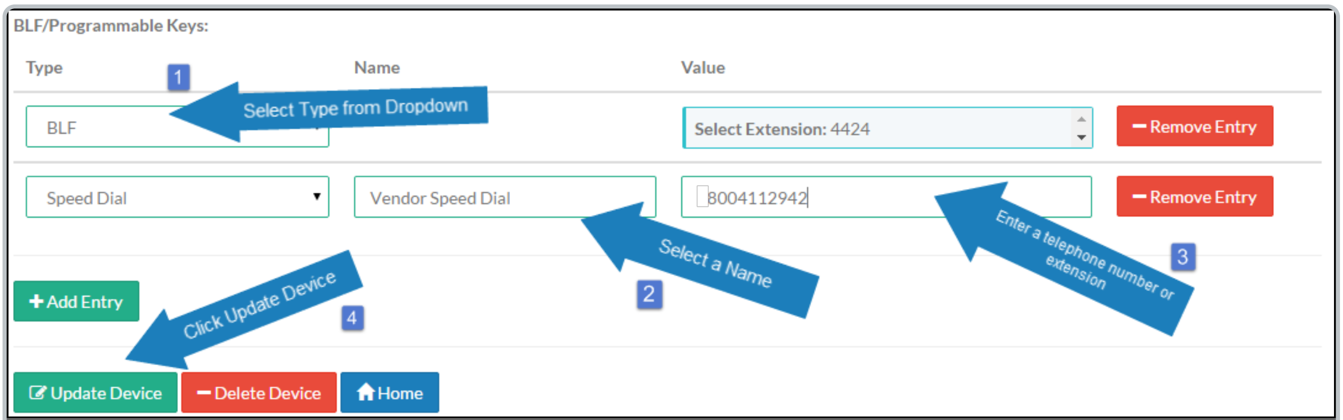


Figure 06: BLF/Programmable Keys Screen

The **Update Device** button must be selected when any type of change is made to the configuration of a specific phone.

When a type, name, and extension have been set, press the **Update Device** button in the bottom left-hand corner of the screen. A prompt is displayed allowing the selected phone to be rebooted remotely. When the Reboot Device prompt as illustrated in Figure 07 is displayed, press the **OK** button to reboot the phone. A typical reboot takes approximately five minutes - depending on make, model, and firmware of the phone.

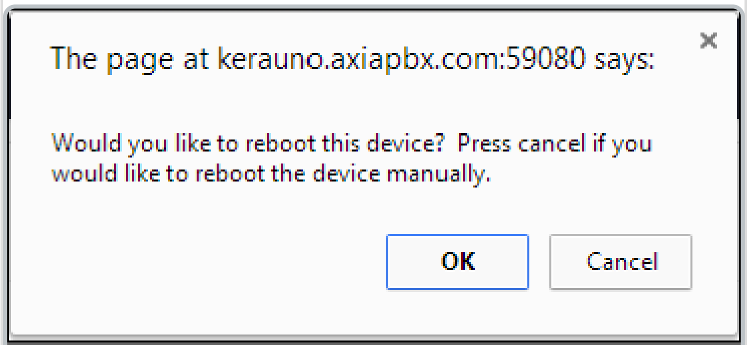


Figure 07: Reboot Device Pop-up

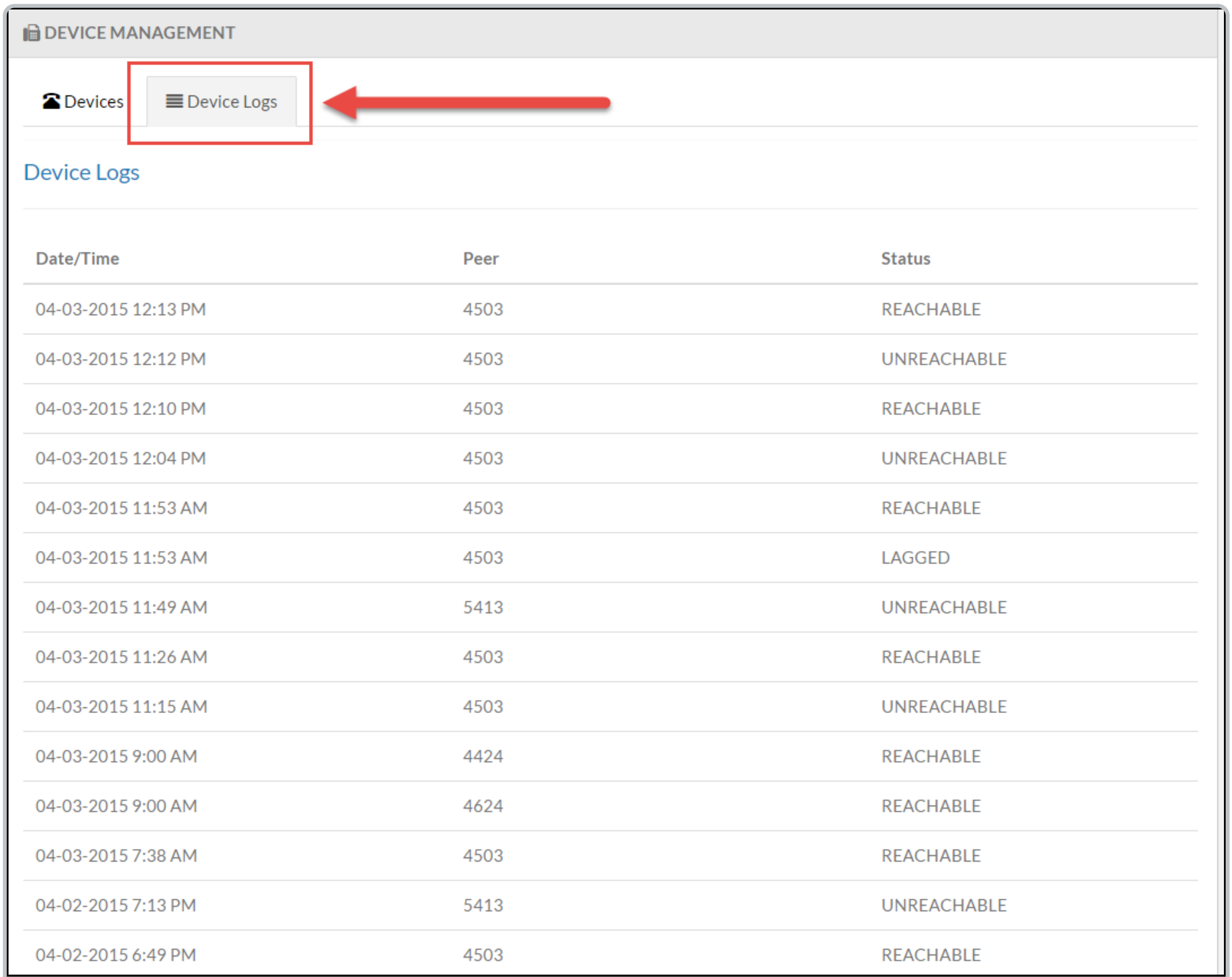
NOTE:	On older phone models, the option to reboot via the interface may not be available. In these cases, make the modifications to the configuration in the interface and then reboot the phone manually by removing the power cord and then plugging it back into the phone.

Device Logs

Last Modified on 05/25/2018 10:19 am EDT

A list of device status changes is displayed every 15 minutes on the **Device Logs** tab.

The **Device Log** tab is located under the **Users & Devices > Devices** menu. To access it, click the **Device Logs** tab at the top of the **Device Management** screen as shown in Figure 01 below.



Date/Time	Peer	Status
04-03-2015 12:13 PM	4503	REACHABLE
04-03-2015 12:12 PM	4503	UNREACHABLE
04-03-2015 12:10 PM	4503	REACHABLE
04-03-2015 12:04 PM	4503	UNREACHABLE
04-03-2015 11:53 AM	4503	REACHABLE
04-03-2015 11:53 AM	4503	LAGGED
04-03-2015 11:49 AM	5413	UNREACHABLE
04-03-2015 11:26 AM	4503	REACHABLE
04-03-2015 11:15 AM	4503	UNREACHABLE
04-03-2015 9:00 AM	4424	REACHABLE
04-03-2015 9:00 AM	4624	REACHABLE
04-03-2015 7:38 AM	4503	REACHABLE
04-02-2015 7:13 PM	5413	UNREACHABLE
04-02-2015 6:49 PM	4503	REACHABLE

Figure 01: Device Management - Device Logs Tab

A list of device status changes is displayed on the **Device Management > Device Logs** tab. The table displayed here is updated every 15 minutes. There are three different columns in the table: **Date/Time**, **Peer**, and **Status**.

Date/Time: Displays the exact time a status change occurred.

Peer: Displays the extension or device that was effected by the status change. If the device is not registered to a specific extension, then the MAC address will be shown.

Status: There are three available statuses that can occur.

1. **Reachable:** The phone became reachable and is able to communicate with Kerauno. The extension is actively registered.
2. **Unreachable:** The phone became unreachable and is no longer able to communicate with Kerauno. The phone may or may not still be registered to Kerauno.
3. **Lagged:** The phone is in a **lagged** state due to increased latency between the phone and Kerauno. If this status occurs, troubleshoot bandwidth issues on the data network between the phone and Kerauno. Lagged phones may display error messages, suffer poor call quality, or may be unable to make inbound or outbound calls. The Lagged status is triggered when the **Keep Alive** packets sent from the Kerauno server to the phone take longer than 2000ms to receive a response.

Registering Phones

Last Modified on 08/16/2019 2:36 pm EDT

If the phones were not registered during the initial installer/turn-up process, please follow the instructions below to configure the phones to work with Kerauno.

Registering IP Phones

1. DHCP must be enabled and must be able to provide an IP address, subnet, and default gateway to a device. If you are not sure if you have DHCP running on your LAN, please contact your IT vendor.
2. Enable DHCP Option 66 (**Boot Server Host Name**) and configure the option value to the IP address of Kerauno. This value points the phones to the Kerauno address then downloads the compatible .cfg file and firmware version from the server.
3. Plug in all of the IP phones. If phones were previously connected to a legacy phone system or VLAN, they may need to be factory reset in order to obtain the new firmware files.
4. Wait a few minutes while the phones reboot. This time varies depending on bandwidth available and the number of phones being configured. (Average firmware/cfg file size is ~5Mb) Once the phones have download the firmware and connected to Kerauno, extensions may now be assigned.
5. To assign an extension to an IP phone, simply dial *611. This code will the run the Kerauno AutoExEC (Device Configuration) program.
6. When prompted, enter the desired extension number for the phone.
7. The phone will reboot and restart with the new assigned extension.

Registering Softphones

1. To register a softphone, first build the user and extension. If registering the softphone as a 2nd extension for a user, build it first under the **Extensions** tab for that user's account as detailed on page 160
2. Go to the **Users** menu and select the desired user from the menu on the right.
3. After selecting the desired user go to the **Extensions** tab for that particular user.
4. Select the blue symbol next to the extension you'd like to register the softphone to as shown in Figure 01 below.

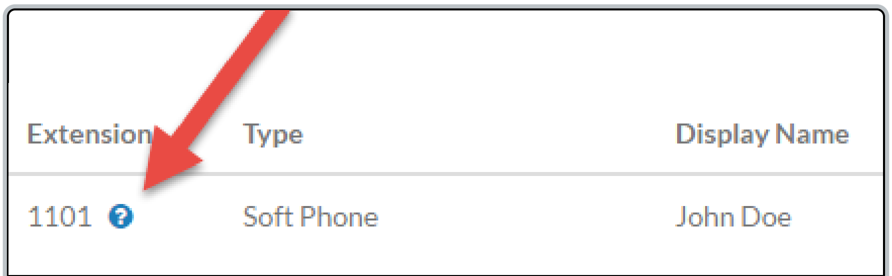


Figure 01: Extension tab of the Users Menu

5. The **IP Address**, **Hostname**, **Registration Username**, and **Registration Password** for this particular extension are listed in the pop-up.

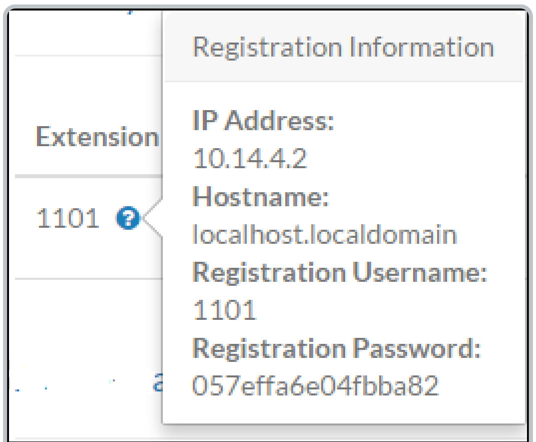


Figure 02: Phone Registration Information

6. Enter this information into your softphone client along with the Hostname where your Kerauno instance resides (ex. Testcompany.kerauno.com). The softphone is now be registered.

NOTE:	If you are attempting to register an IP or softphone for any Kerauno user outside of your network (for example, a remote employee utilizing their home internet connection) you must be sure to add their public IP address to the Kerauno Firewall tool. The firewall tool is located under **Systems & Settings** > **Network & Firewall** > **Firewall**.

Generic Extensions

Last Modified on 05/25/2018 10:08 am EDT

A **Generic Extension** is an extension on the phone system that is not tied to one specific user. Break room phones, conference room phones, or any phone that is located in a public area are examples of where a generic extension is used. Generic Extensions do not have a voicemail box or access into the Kerauno **User Panel**.

To create a new generic extension, press the **+Add Generic Extension** button from the **Users & Devices > Generic Extensions** menu.

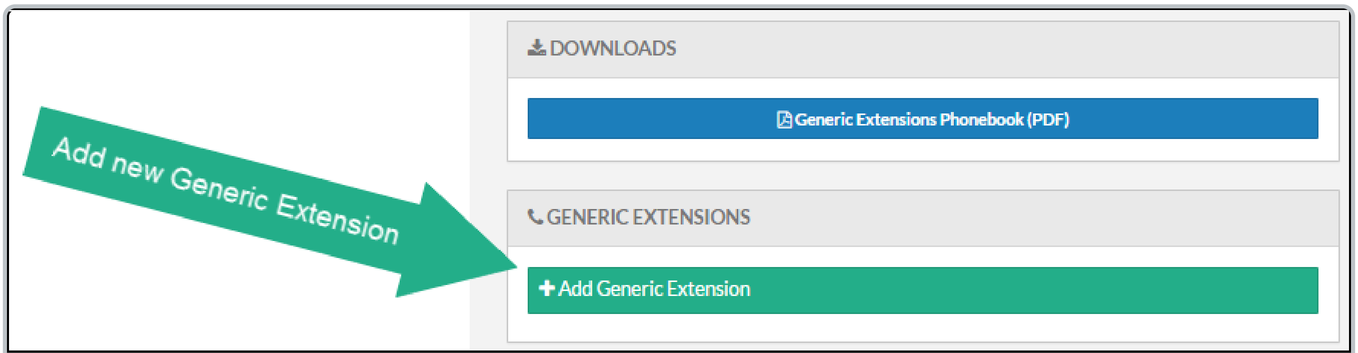


Figure 01: Add Generic Extension Button

The **Generic Extensions Management > Extension Information** tab is displayed allowing the new generic extension to be configured.

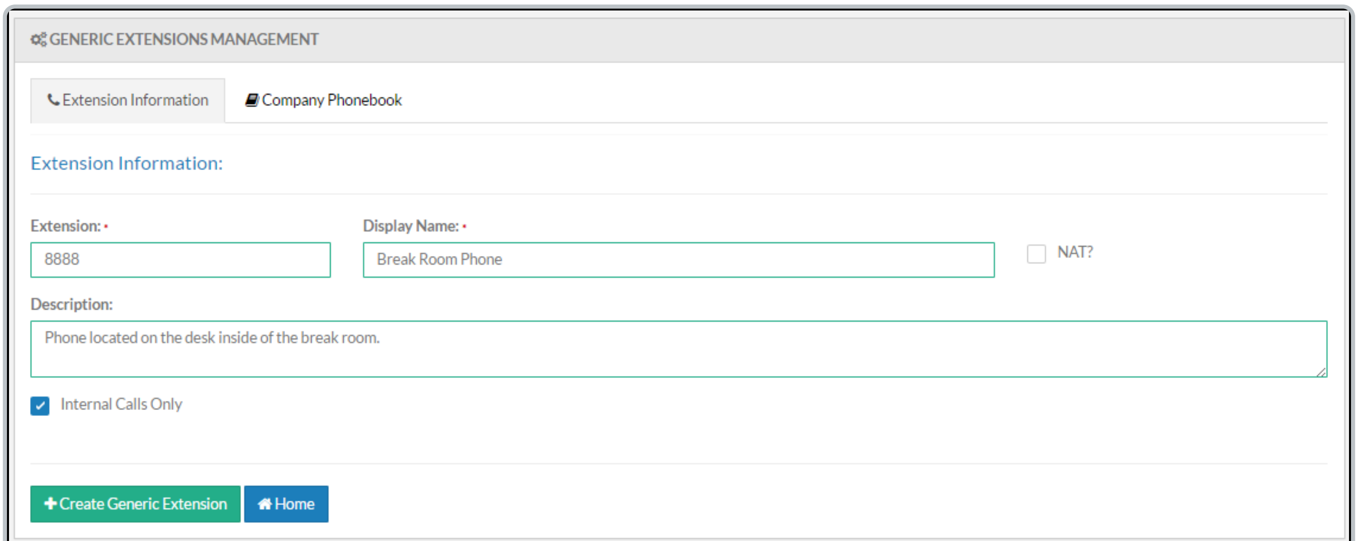


Figure 02: Generic Extension Management - Extension Information Tab

The fields on this screen are:

- **Extension:** Select which extension number should be assigned to the generic extension.

- **Display Name:** Choose a display name that will show on the LCD screen of the phone.
- **NAT:** NAT toggle allows for Network Address Translation to be added to the configuration of the extension settings and the physical phone. If an extension experiences problems with one way audio or getting a **Seize Failed** or **Reorder** message, try enabling the **NAT** option.
- **Description:** A free-form field for describing the extension (example: Phone located in conference room A).
- **Internal Calls Only:** Toggle this option to only allow extension-to-extension calls from this phone.

When all fields on this page are completed, press the **+Create Generic Extension** button to add the extension to the phone system.

Generic Faxes

Last Modified on 04/24/2019 1:14 pm EDT

A **Generic Fax** is an extension on the phone system that is not tied to one particular user. Some examples of where a generic fax would be used include a departmental fax, a company-wide fax sent to an administrative assistant, or any other fax number not tied to one specific person. Inbound faxes to a generic fax are sent to a specified email as well as appearing in the **User Panel > Fax menu.** Outbound faxes can be sent from a generic fax under the **User Panel > Fax** menu as well.

To create a new generic fax extension, select the **+Add Generic Fax** button from the **Users & Devices > Generic Faxes** menu.

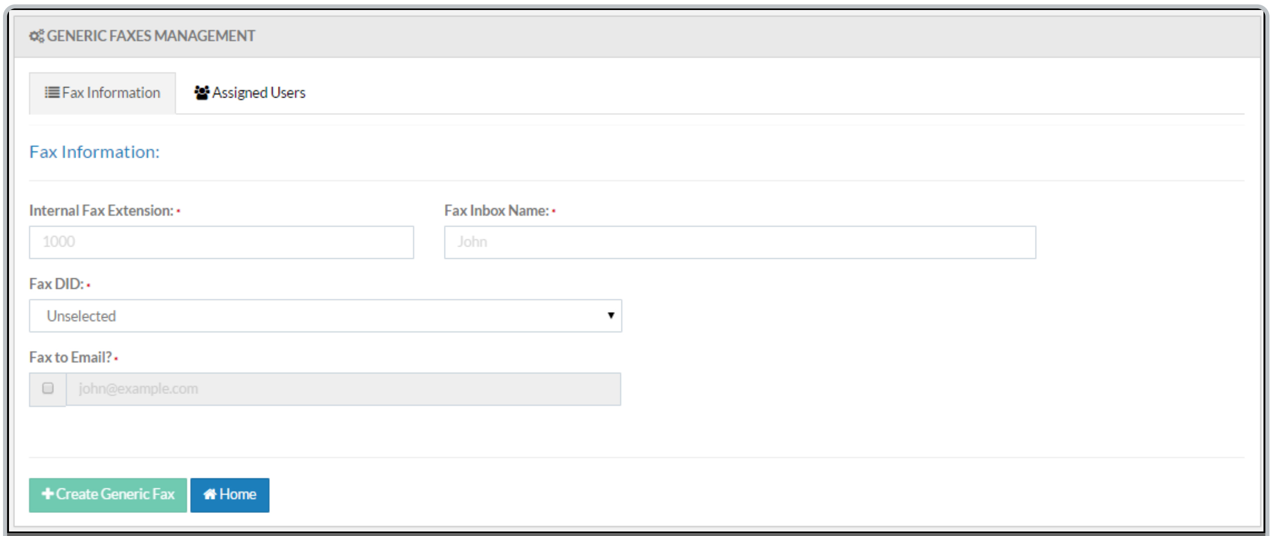


Figure 01: Generic Faxes Management - Fax Information Tab

The **Generic Faxes Management** menu is displayed allowing the new generic fax to be configured. The fields on this screen are:

- **Internal Fax Extension:** Select any available extension number to assign to the fax. This is used for administrative purposes and the dialing the extension will have no effect.
- **Fax Inbox Name:** Choose a display name that will show within the Kerauno User Panel.
- **Fax DID:** Select which DID number to designate as the fax line associated with this fax inbox. Any available number under the **System Admin > Number Manager** menu can be used.
- **Fax to Email:** Enter an email address to send faxes to. Faxes will be attached to

sent emails as a PDF.

- **Assigned Users Tab:** The **Assigned Users** tab allows administrators to assign which users will have access to generic fax destination. To assign users to a generic fax, select the button under the **Assigned Users Tab,** click the checkbox next to the desired user(s), and press the **OK** button. Any user that is assigned to a generic fax can view and download inbound faxes to the generic Fax DID via the **User Panel > Fax** menu. Also, users may choose to send outbound faxes from the generic fax DID under the **User Panel > Fax > Fax Settings** menu.

Activating Inbound FAX to Email for a User

Last Modified on 04/12/2019 8:15 am EDT

In Order enable inbound FAX to a user's DID number you will need to enable the **FAX to Email** setting for the user. This will cause Kerauno to listen on the line for a FAX tone and receive the FAX if one is inbound. This prevents the user's phone from ringing if the incoming call is a FAX, which also will introduce a short delay to accomplish this.

Find the User you would like to activate the feature for:

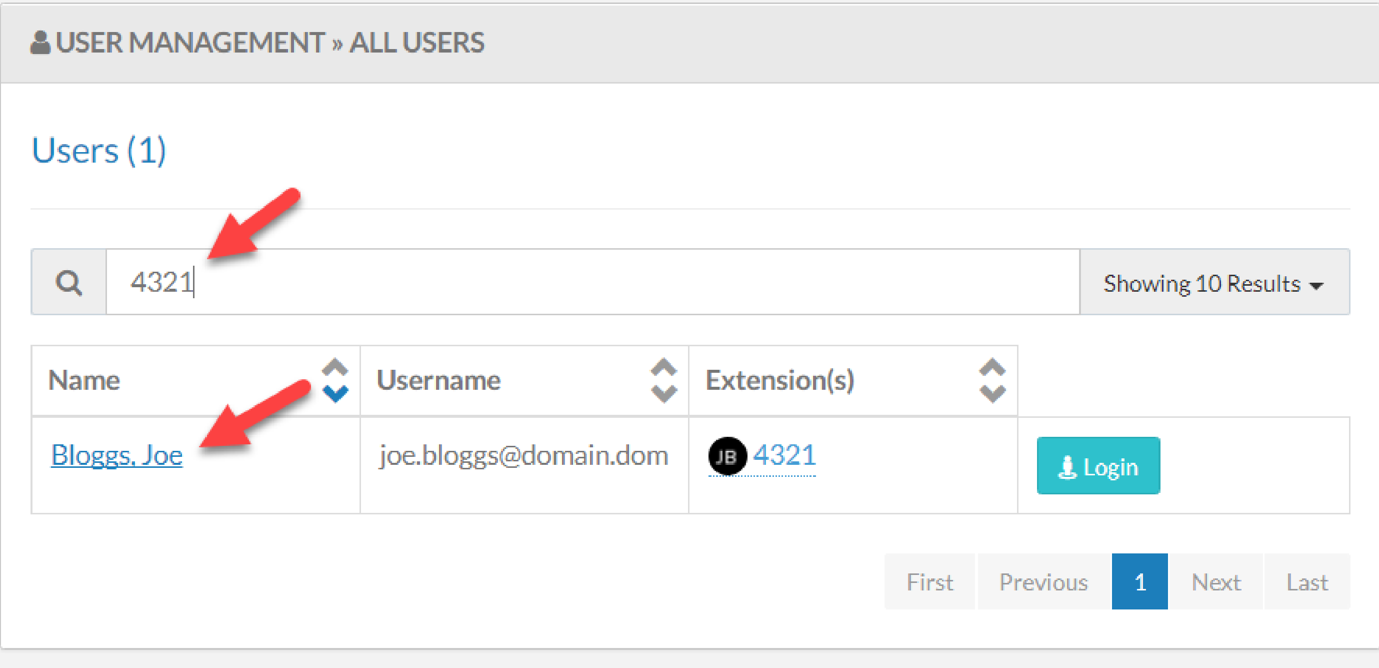


Figure 01: Search for User

Verify that there is a DID associated with the User. Enable the **Fax to Email** option:

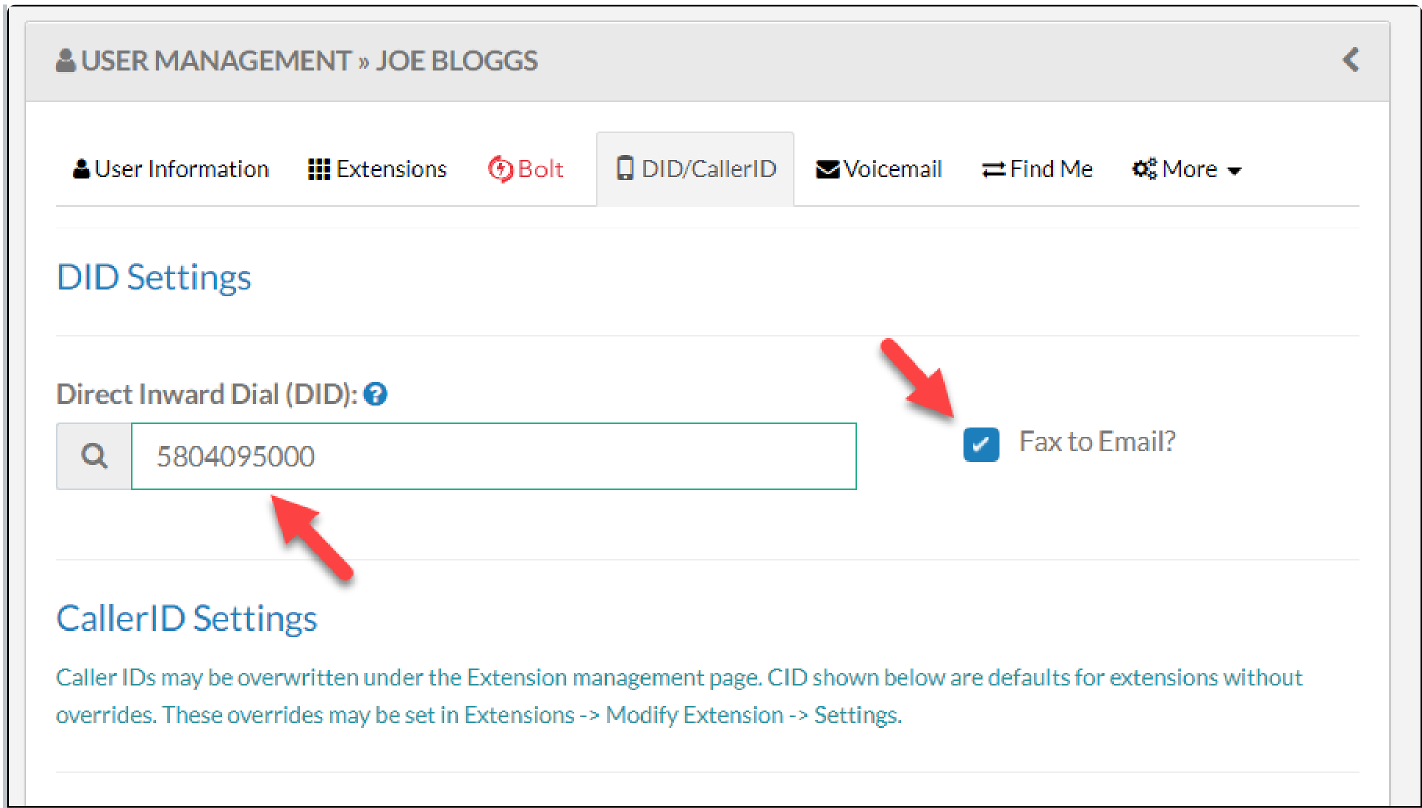


Figure 02: Enable Fax to Email Option

NOTE:	This function will be available only if the user has a DID associated with them.

Generic Voicemails

Last Modified on 10/01/2019 1:53 pm EDT

Generic Voicemail Transcription is available for users on 3.1.01 and higher, excluding premise enterprise customers.

A **Generic Voicemail** box is a voicemail that is not tied to one specific user. Some common examples a generic voicemail use include: “After Hours” voicemails when the business is closed, departmental voicemails, or as a failover destination during long hold times. Generic voicemails can be set to send to a specified email, show in the **User Panel > Voicemail** menu, or it can be accessed by dialing *87 then the **Voicemail Extension** assigned.

The **Users & Devices > Generic Voicemail** menu is displayed with a list of all generic voicemails built into the phone system. Press the **+Add Generic Voicemail** button to add a new mailbox. The **Generic Voicemail Management** menu is displayed allowing the new generic mailbox to be configured.

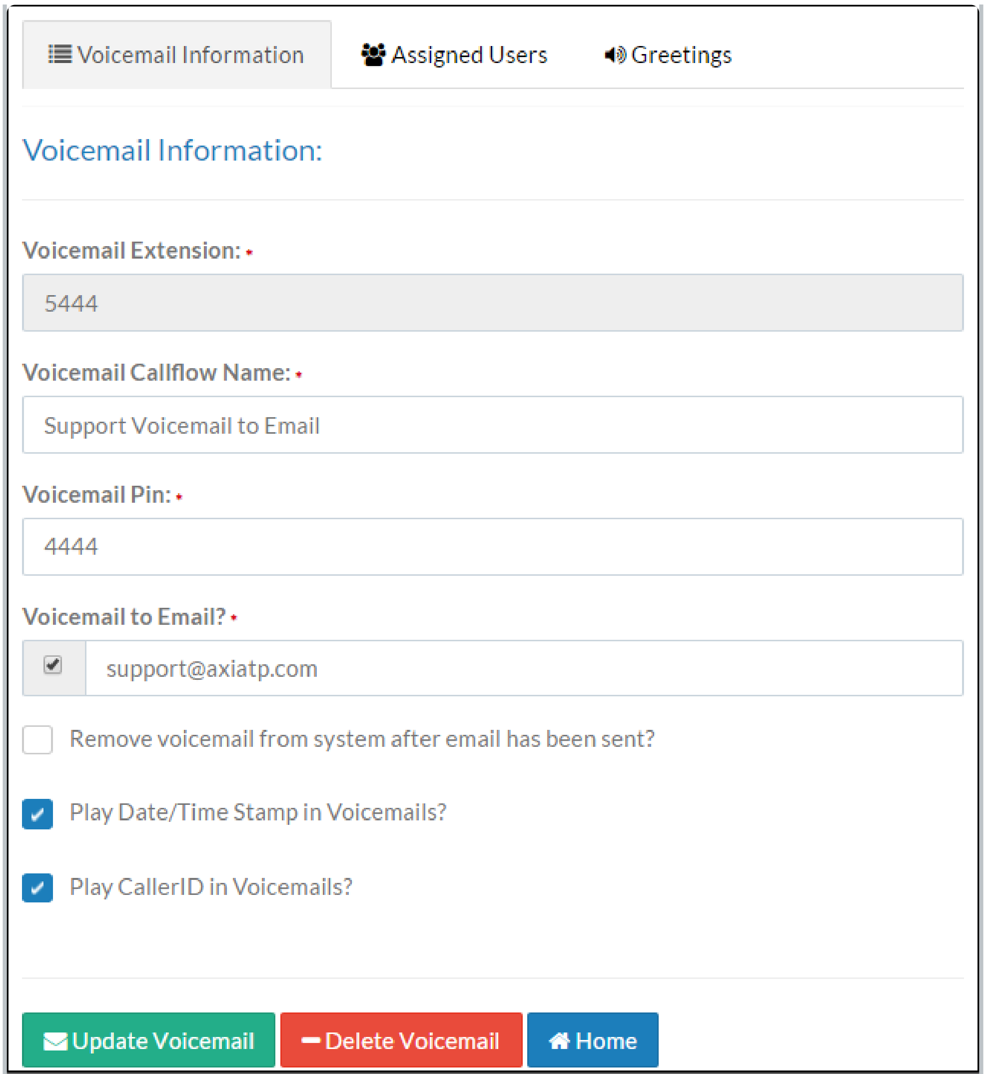


Figure 01: Voicemail Information Tab

The fields on this screen include:

Voicemail Extension: Select which extension number to assign to the generic mailbox. This mailbox can be accessed by dialing *87 and the assigned Voicemail Extension number.

Voicemail CallFlow Name: Enter a name for the generic mailbox (Ex: "After Hours Mailbox" or "Company General Mailbox"). This name is displayed in the **Call Routing > Call Flow Tool** when setting up routes to the mailbox.

Voicemail Pin: Enter a four-to-six digit PIN to allow access into the voicemail box. This is a required field.

Voicemail to Email: Click the **Voicemail to Email?** by enabling the small checkbox to the left of the email field as shown in the Figure 02 to the right.

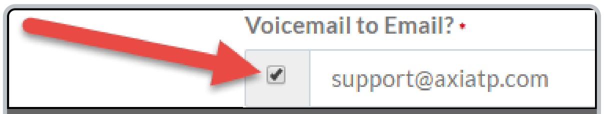


Figure 02: Voicemail to Email? Checkbox - Enabled

Then enter the desired email where voicemails should be sent. Voicemails will be forwarded as an attachment to whatever address is specified in this field.

Remove Voicemail From System After Email has Been Sent?: If this box is selected/checked, voicemails will be deleted from the mailbox after they are sent to the specified email. This feature keeps the box from becoming full quickly (max 100 messages) and removes the need to delete old messages manually (either via the User Panel or physical handset).

Play Date/Time Stamp in Voicemails?: Plays a date/time stamp during message playback.

Play CallerID in Voicemails?: Plays the caller ID number during message playback.

Assigned Users Tab: The **Assigned Users** tab allows administrators to assign which users will have access to a generic mailbox. To assign users to a generic voicemail, press the button under the **Assigned Users Tab**, select the checkbox next to the desired user(s), and press **OK**. Any user that is assigned to a general voicemail box will have voicemails to the general mailbox appear under the **User Panel > Voicemail** menu.

Upload Greeting

To upload a pre-recorded voicemail greeting to the generic mailbox, click the **Greeting** tab. On this page an option is listed to upload a new greeting to the mailbox. Select the light-blue **Upload Recording** button as shown in the Figure 03.

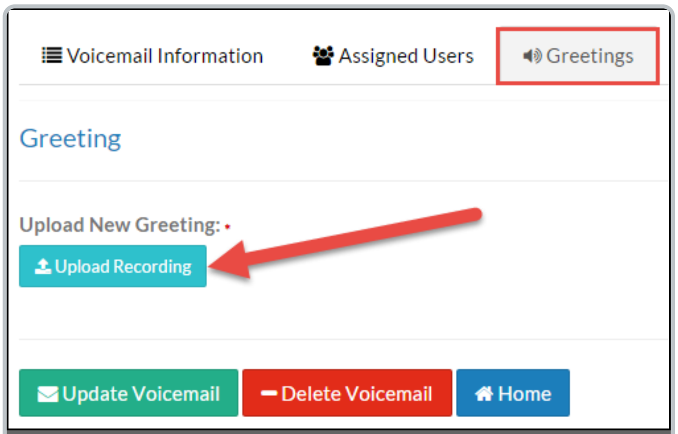


Figure 03: Greeting Tab

An explorer window opens allowing admins to navigate to the local destination where the audio file is stored. Almost all audio formats are accepted, including .mp3, .wma, .wav, and many more. Select the desired file and press the **OK** button to upload the audio greeting to the generic voicemail box. When finished, press the **Update Voicemail** (existing) or **Create Generic Voicemail** button to save changes.

Paging Zones

Last Modified on 05/25/2018 10:13 am EDT

Paging zones allow system administrators to target pages to specific areas in an organization.

Kerauno supports **Paging Zones** via the use of an Algo 8180 SIP Alerter. This paging device must be pointed to Kerauno via the DHCP option 66 before displaying in the interface under **Users & Devices > Paging Zones.**

Once connected, the device will be added to the list of available paging devices as shown in the Figure 01 to the right.

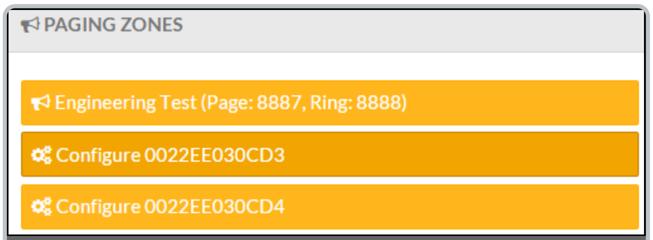


Figure 01: Paging Zones

Devices which have not yet been assigned will display "**Configure**" followed by the MAC address of the connected device.

Before adding a paging zone, two generic extensions must be built for the paging device under **Users & Devices > Generic Extensions**.

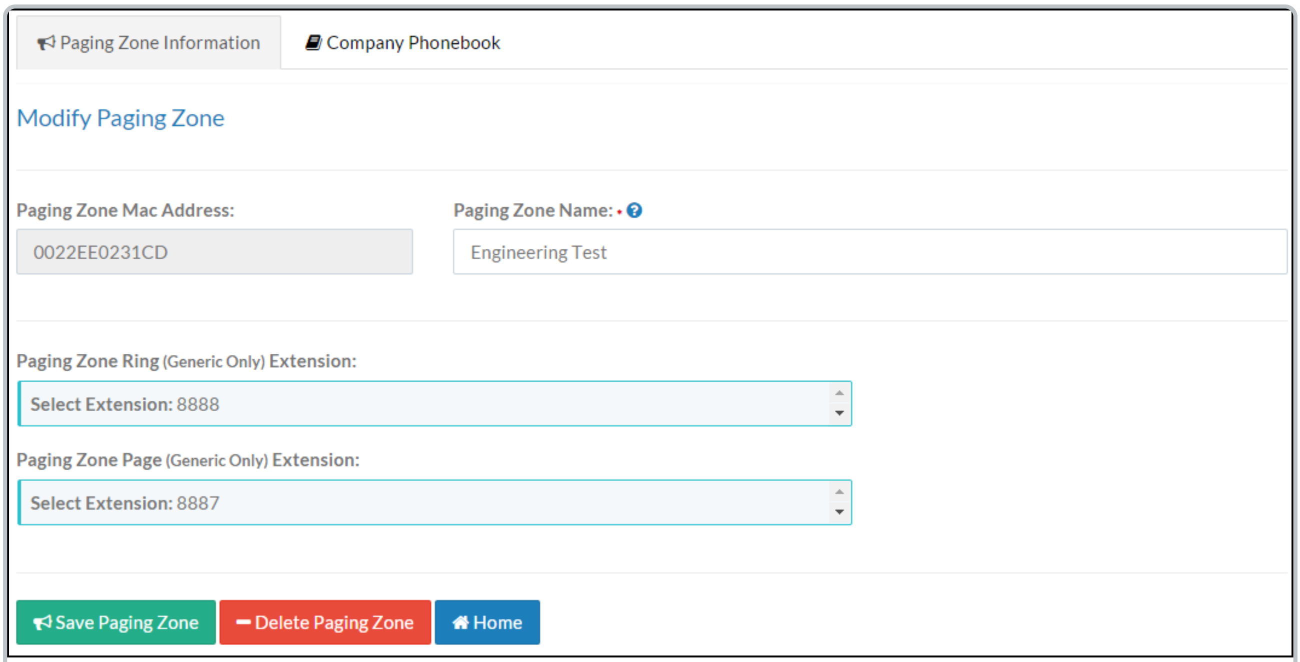


Figure 02: Modify Paging Zone Screen

The fields listed below must be completed on the Modify Paging Zones screen:

- **Paging Zone Name:** The Paging Zone Name allows the paging device to easily be identified with in the Kerauno interface (Ex: Work floor page, warehouse page, etc.)
- **Paging Zone Ring Extension:** In this field, select a ring extension. If the ring extension is dialed, the device will not answer, and instead will continue to play a .WAV file until the originating party hangs up. The .WAV file must be pre-loaded onto the device. This is useful for simple alerting that plays a static audio file via the device speakers to an area such as a warehouse floor or workshop.
- **Paging Zone Page Extension:** In this field, select a page extension. If the page extension is called, the device will answer and allow paging over its internal speaker. When the paging device answers a two way talk path will be created between the paging device and originating extension.

Permissions

Last Modified on 08/30/2019 2:06 pm EDT

This screen is used to administer and manage user access within Kerauno.

Main Menu

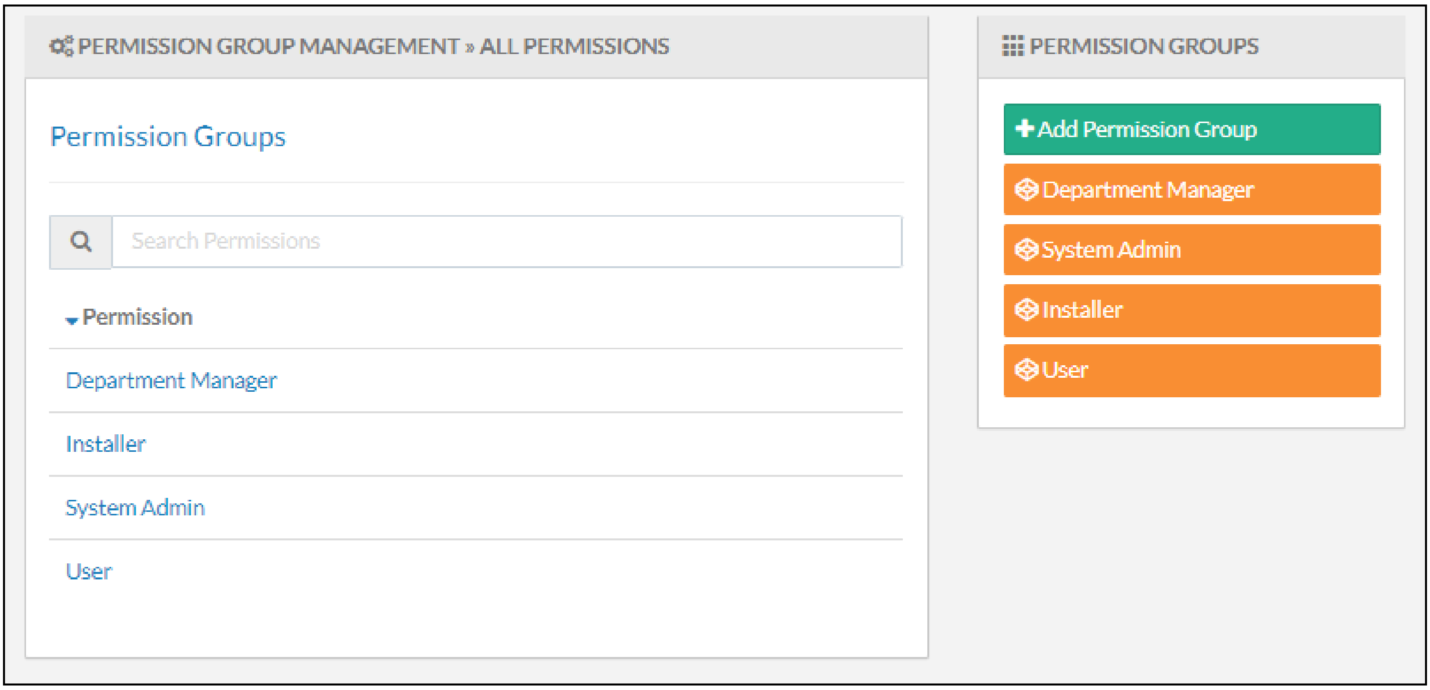
Permission Groups appear on the main screen and can be sorted by name. Click the respective Permission Group hyperlink to view more details. The right side of the screen contain links to + **Add Permission Group** and frequently accessed Permission Groups.

Kerauno recommends using the four default Permission Groups explained below to maintain controlled and consistent access across an organization.

- User
- Department Management
- System Admin
- Installer

Only add additional Permission Groups to handle exceptions.

Note: Users cannot belong to more that one Permission Group. A custom group may be needed to accommodate specific permissions such as Call Recordings.



Default Permissions Groups

User

The User group is the most basic level of access with the least amount of permissions possible. Users can view and interact within the following features:

- User Panel
  - Profile
  - Voicemail
  - Calls
  - Find Me
  - Phonebook
  - Fax
  - Devices
  - Reports
- Kerauno Presence

When new users are created in Kerauno, they are assigned this permission by default.

Note: Access to Chat+ is handled at the individual User access level via **Users & Devices > Users**.

Department Manager

The Department Manager group includes all permissions defined in the User group, along with Conference Rooms and Reporting menus.

This additional access allows Department Managers the ability to monitor call records and quickly create Conference Rooms to handle important issues. Managers can also access Ring Group calls as needed without the requirement of being part of the Ring Group. New users added as a Department Manager from **User & Devices > Departments** are assigned this permission by default.

System Admin

The System Admin group includes all permissions defined in the User and Department Manager groups above, along with Users & Devices, System Admin, and Interaction Routing menus.

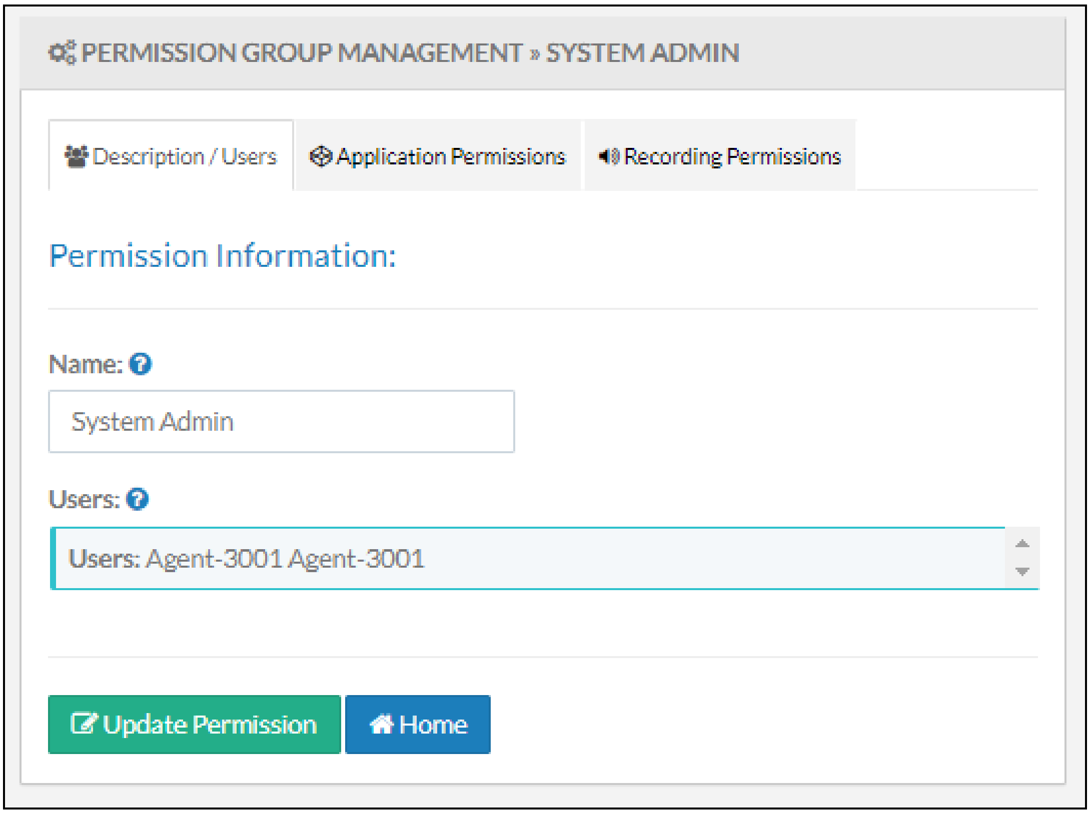
These additional permissions allow a System Admin the ability to manage Call Flows, User Configuration, and Devices with Kerauno.

Installer

The Installer permissions group has the highest level of access in Kerauno. An installer includes all permissions of a System Admin, along with access to the Systems & Settings menu where Network, Trunking and Alerts are established within Kerauno. Many of the settings handled by this level of access are addressed during the initial installation.

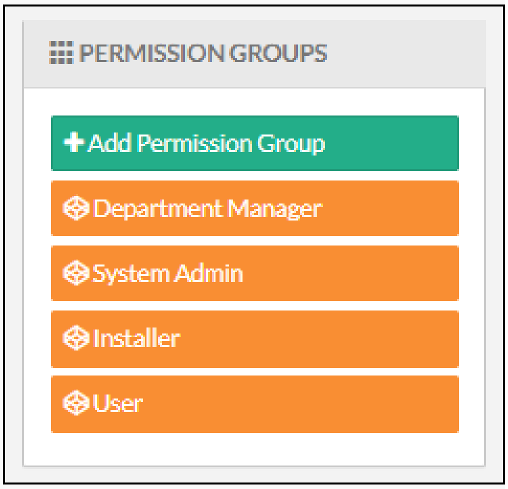
Adding User to a Permission Group

Select the appropriate Permission Group from the right side of the screen.
Click **Users** and select employees to add to the group from the drop-down menu.
Click **Update Permission** when finished.



Creating Custom Permissions Groups

Click **+ Add Permission Group** to create a new Permission Group with custom Permissions outside of the four default groups.

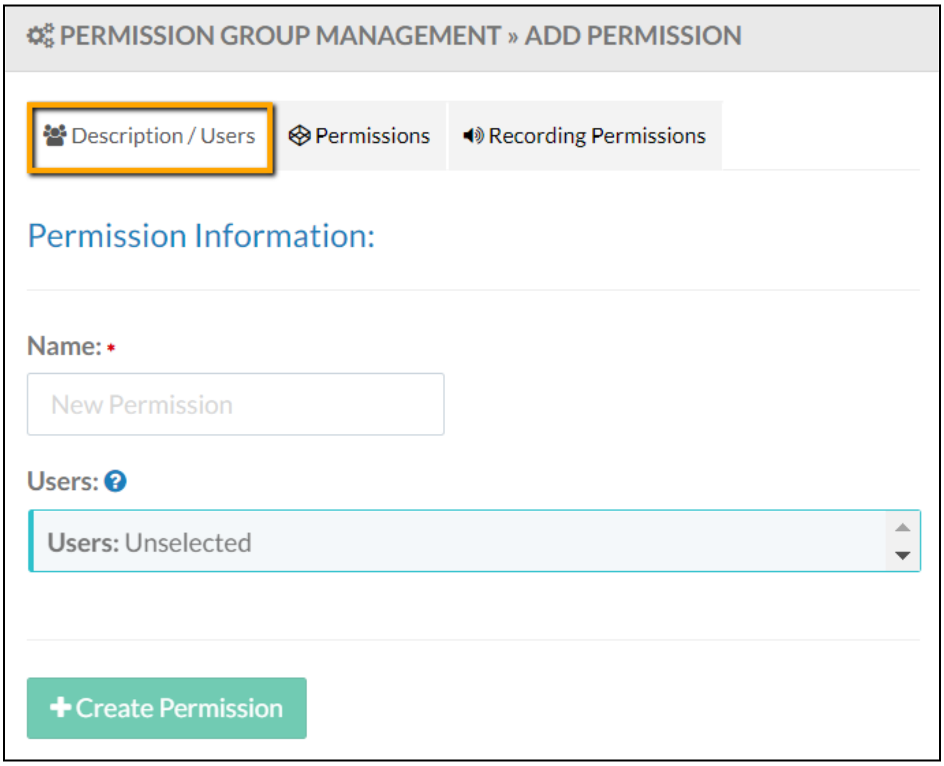


- Create a Permission name on the Description/Users tab.
- Select custom permissions on the Permissions tab.
- Enable Recording Permissions on the Recording Permissions tab.

Reminder: Kerauno recommends using these four Permission Groups to maintain consistent access across an organization. Only add additional Permission Groups to handle exceptions.

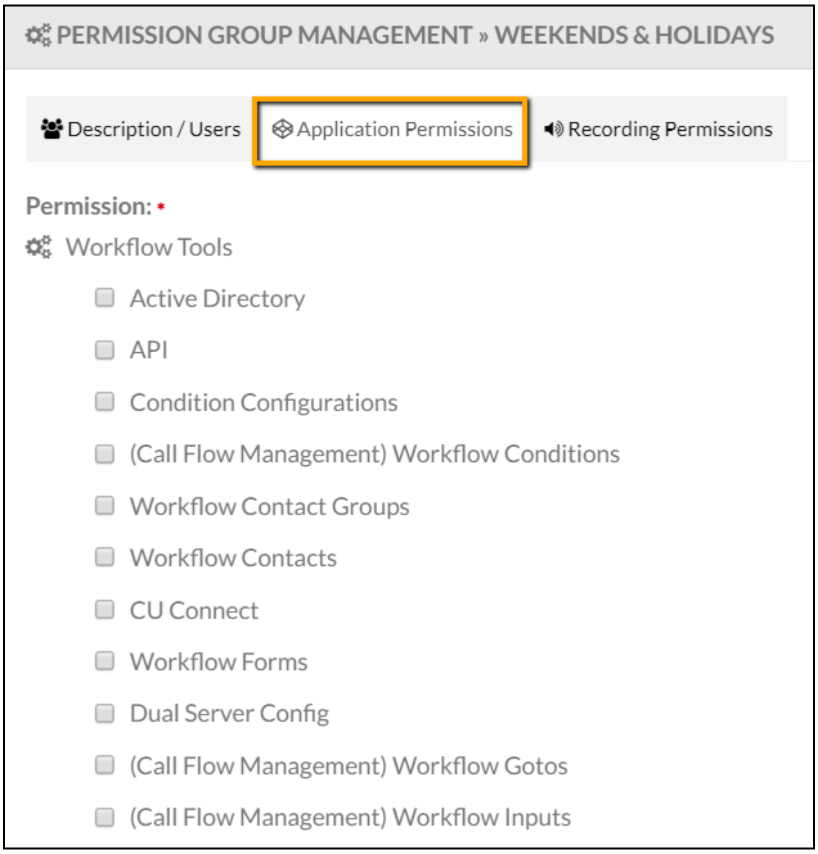
Description / Users Tab

From this tab, name the new Permission Group and select users to add to the group from the Users drop-down menu. Click **Create Permission** when finished.



Application Permissions Tab

Use this tab to manage Permissions for the active Permission Group. Click the checkbox next to each item to grant access for the section within the Permission Group.



Permissions are organized by Kerauno section and functions such as Workflow Tools, User Panel, Interacting Routing, and Reporting.

Workflow Tools

Permission	Definition
Active Directory	Create and manage Active Directory credentials and establish sync settings for Users, and Departments. **Note:** Appropriate licenses required.
API	Generate API Key, add Post API URL, View API & Config Documentation. **Note:** Appropriate licenses required.
Condition Configurations	Create and manage conditional configurations for use in a Call Flow.
(Call Flow Management) Workflow Conditions	Insert Workflow Conditions in a Call Flow.

Workflow Contact Groups	Create and manage Contact Groups for use in a Call Flow.
Workflow Contacts	Create and manage individual Contacts for use in a Call Flow.
CU Connect	Manage integrations with Episys, Corelation, and FiServ. **Note:** Appropriate licenses required.
Workflow Forms	Create and manage Workflow Forms for use in Flows.
Dual Server Config	Configure and manage a secondary server for backup safeguards. **Note:** Appropriate licenses required.
(Call Flow Management) Workflow Gotos	Create and insert Workflow GoTo's in a Call Flow.
(Call Flow Management) Workflow Inputs	Create and insert Workflow Inputs in a Call Flow.
Salesforce Integration	Configure and manage Salesforce API, Sandbox Mode, Users, and Settings.
(Call Flow Management) Workflow Tagging	Create and insert Workflow Tagging in a Call Flow.
VPN Configuration	Configure and manage VPN settings. **Note:** Appropriate licenses required.
Webhook Configurations	Create and manage Webhook Configurations to use in Flows.
(Call Flow Management) Workflow Webhooks	Create and manage Workflow webhooks in a Call Flow.
Workflow Tag Management	Create and manage Workflow Tags in a Call Flow.
Zoom Integration	Manage Zoom API credentials and Webhook. **Note:** Appropriate licenses required.

System Admin

Permission	Definition
Active SMS Interactions	View active SMS interactions and end interactions as needed.
Dial Plans	Create and manage Custom Dial plans.
Feature Codes	Review a list of System Reserved Feature Codes and descriptions along with Application Speed Dials and descriptions.
Bulk Import	Bulk Import files and download previously uploaded data.
Music on Hold	Create and manage Playlists for use within Kerauno.
Number Manager	Create and manage system numbers and force trunk as needed.
System Connector	Add a System Connector to connect a Kerauno instance to another system.
Presence Management	Create and manage Custom Extension Groups within Presence.
System Recordings	Create and manage announcements for use within Kerauno.
Trunks	Add a new SIP Trunk to connect two different unified communication platforms.
Voicemail Blasting	Create a voicemail blast to be sent to as a voicemail to all Kerauno users.
Core Rebuild	Ability to apply changes within Kerauno.

Conference Rooms

Permission	Definition
Ad-Hoc Conferences	Create and manage Ad-Hoc Conference Rooms that are available at all times.
Leader-Based Conferences	Create and manage Leader-Based Conference Rooms that require both a participant and leader PIN to operate.

User Panel

User Panel	**Definition**

Calls	Review call history metrics.
Devices	Review associated devices and extensions assigned to a Kerauno user.
Workflow Forms	Ability to configure workflow forms.
Fax	Send, receive, and review fax communications.
Find Me	Enable Find Me.
JIRA Manager	Create and manage JIRA Account Manager accounts.
Reports	View system generated reports.
Phonebook	View User, Extensions, and Department listings. Access Phonebook PDF and Bolt directory.
Kerauno Presence	Toggles presence on/off for a user.
Voicemail	Access and manage voicemail messages, establish greetings, and configure settings.

Reporting

Permission	**Definition**
Agent Analytics	View agent activity across all Ring Groups.
CDR Logs	Run reports on Call Detail Reports (CDR).
Workflow Form Report	Run reports on workflow forms.
Downline Report	View outbound call information for logged in agents within a Ring Group.
In-Call Analytics	View call routing path through Kerauno.
Call Recordings	Listen to and download recorded calls.
Ring Group Analytics	View Ring Group and queue management metrics.
Scheduled Reports	Displays all scheduled reports.
SMS Reports	View SMS details by DID data and interactions by SMS Flow.
Trunk Analytics	View inbound and outbound call information by trunk.
Wallboard	Generate and view wallboards.

Interaction Routing

Permission	Definition
Call Ring Group Modifiers	View/create Ring group Modifiers in flow module.
Call Announcements	View and create call announcements in flow module.
Call Blacklist	Manage and add numbers to blacklist; meaning calls from these numbers will not be delivered.
Flows	Create and manage call flows for use within Kerauno.
SMS/Call Toggles	View Call/SMS flow toggles in SMS Flows.
Holiday Lists	Create and manage call routing settings for holidays and non-business hours for use within Kerauno.
SMS Inbound Msg.	Create and manage inbound SMS messages for use within Kerauno.
Call IVRs	View and create IVRs in flow module.
SMS Messaging Group	Create and manage SMS Messaging Groups for use within Kerauno.
Call Inbound Routes	View inbound routes in flow module.
Call Parking Lots	Create and manage Parking Lots for use within Kerauno.
SMS Outbound Msg.	Create and manage outbound SMS messages for use within Kerauno.
Call Ring Groups	Create and manage Ring Groups for multiple endpoints for use within Kerauno.
Call Speed Dials	Create and manage Speed Dial destinations for use within Kerauno.
Call/SMS Time Conditions	View/create Time conditions in Call and SMS Flows.

System Settings

Permission	Definition

Email & System Alerting	Manage alerts for email and Ring Groups.
Backup/Restore	Establish backup settings for local as well as remote destinations. Perform backup restores as needed and mange backup alerts.
Network & Firewall	Create and manage Firewall Rules.
System Health	View system health performance metrics and restart services as needed.
Licensing	View current license details and apply new licenses as needed.
System Logs	System Log report available for CSV export, Print or PDF.
Migration Kit	Create and manage Extension Aliases as needed. Toggle outbound routes over internal dialing.
Remote Storage	Create new remote destination and manage remote storage alerts.
System Settings	Access System Settings.
Updates	View available system updates and edit server backup setting prior to update.

Users & Devices

Permission	Definition
Departments	Create and manage departments for use within Kerauno.
Devices	Create and manage devices on the Kerauno system. Find new devices and reboot as needed.
User Forwarding	Add user forwarding settings for use within Kerauno.
Generic Extensions	Create and manage generic extensions within Kerauno.
Generic Faxes	Create and manage generic faxes within Kerauno.
Generic Voicemails	Create and manage generic voicemails within Kerauno.
Paging Zones	Create and manage paging zones for use on the Kerauno system.
Permissions	Add users to default Permission groups. Add new permission groups only as needed.
Users	Create and manage users within Kerauno.

Recording Permissions Tab

The Call Recordings checkbox must first be checked under the Reporting section on the Application Permissions tab before the following permission option displays on the Recording Permissions tab.

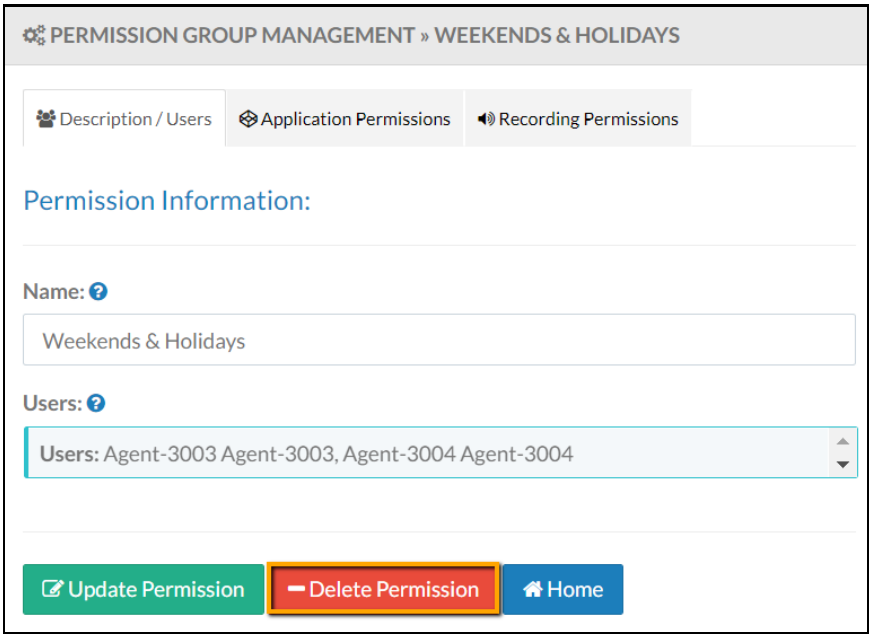
Permission	Definition
All Recording Permissions	Record all calls for the active Permission Group.

Edit or Delete a Permission Group

Click on the Permission Group Name to edit, make the needed edits, and click **Update Permission** when finished.

To delete a created Permission Group, access the group and click **Delete Permission**.

Note: Default Permission Groups cannot be deleted.



Active Directory Configuration & Syncing

Last Modified on 05/10/2019 11:53 am EDT

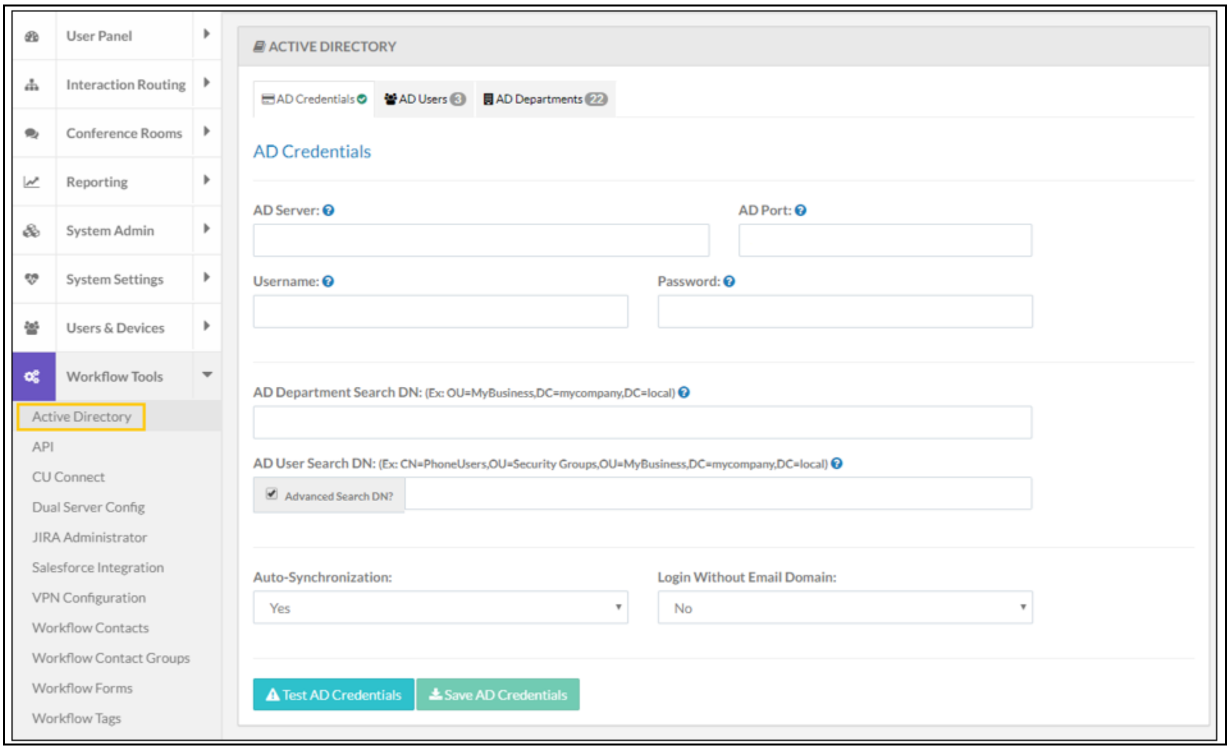
Active Directory Server Requirements

- Active AD account
- Windows Server 2008 R2 or above
- Username/Email field in AD must be accurate, as Kerauno uses this field to match existing users with AD accounts.

AD Admin Configuration

The following steps establish the initial sync between the Kerauno server and an Active Directory server.

In Kerauno, navigate to navigate to Workflow Tools > Active Directory:



Populate the following fields on the **AD Credentials** tab:

AD Server – Enter Active Directory server IP address.

AD Port – Enter the port in which the Domain Controller is configured to use for Active Directory query purposes. The majority of AD installs will utilize Port 389.

(If unsure, use 389.)

AD Username and Password – An account with read access to the specific DN to integrate Kerauno is required. From an access control standpoint, this can be a dedicated service account in AD for the purpose of syncing contacts with Kerauno. An existing account may also be used.

AD Department Search DN – Once the platform has authenticated into the AD server, it utilizes two different types of LDAP queries to determine where to find the appropriate contacts:

- Security Groups
- Organizational Units

AD User Search DN – Used by Kerauno to locate all users who should be available for sync into Kerauno. An **All Users** group or **Phone System Users** group in Active Directory are typically entered in this field. Alternatively, a new group can be created containing only the users to add to the system.

Advanced Search DN? – Click this checkbox to ensure that the search results are relevant to Kerauno.

Examples:

CN=Kerauno_PhoneUsers

OU= Groups

DC=goodcompany

DC=local

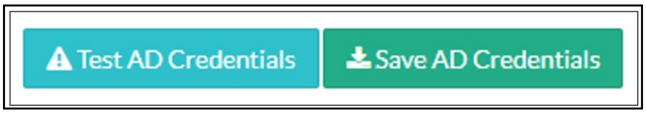
In this example CN=Common Name; OU = Organization Units and DC= Domain Component

Note: AD Department Search DN points to any directory in which AD departments are located. When the AD system is managed in a departmental fashion (meaning each department of the organization has their own Active Directory group), enter a SearchDN to the top-level directory in which departments are located.

Auto-Synchronization – To automatically build users and departments from Active Directory into the Kerauno platform, select **Yes**. To use Active Directory for Single Sign On (SSO), select **No**.

Login Without Email Domain – Select **Yes** to allow users to log in with either their username or email address. **Example:** john.doe and john.doe@company.com.

Once populated, click **Test AD Credentials** to test the configuration setup. When successful, an alert displays confirming success.



Once authentication has been tested successfully, click **Save AD Credentials**.

Syncing Users

Once AD credentials are stored, add users. There are two ways to synchronize users:

- Workflow Tools > Active Directory > AD Users tab.
- Users & Devices > Users.

Workflow Tools > Active Directory > AD Users tab

Syncs all users with these fields populated in AD:

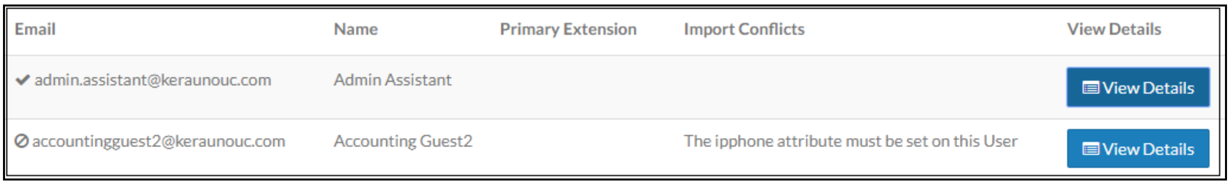
- Name (first/last in Kerauno)
- Email address/Username
- Extension (this field is required in order to create the user in Kerauno)

When syncing through the AD Users tab, any future edits to users much occur within AD directly. Changes will be reflected within one hour.

The main disadvantage of syncing users through the AD Users tab is that if users are un-synced for any reason, they can only be added again from within Active Directory or from the specific User page in Kerauno.

Access the Workflow Tools > Active Directory > AD Users tab. A list of recognized users displays. The **Import Conflicts** column provides details when a user cannot be added to AD.

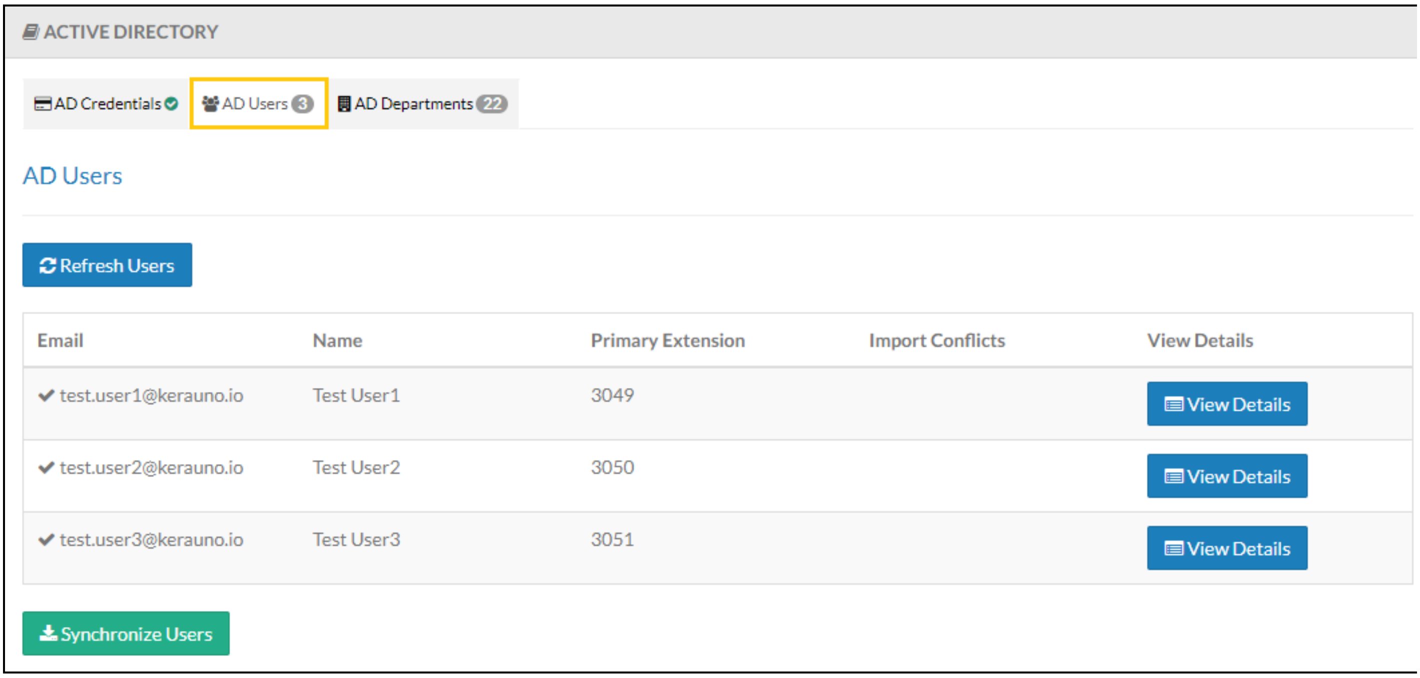
Synced users reflect a check mark. A prohibited icon is displayed next to users that are not currently synced with AD:



Email	Name	Primary Extension	Import Conflicts	View Details
✔ admin.assistant@keraunouc.com	Admin Assistant			View Details
⊘ accountingguest2@keraunouc.com	Accounting Guest2		The ipphone attribute must be set on this User	View Details

Click **View Details** to review the content synced for each user:

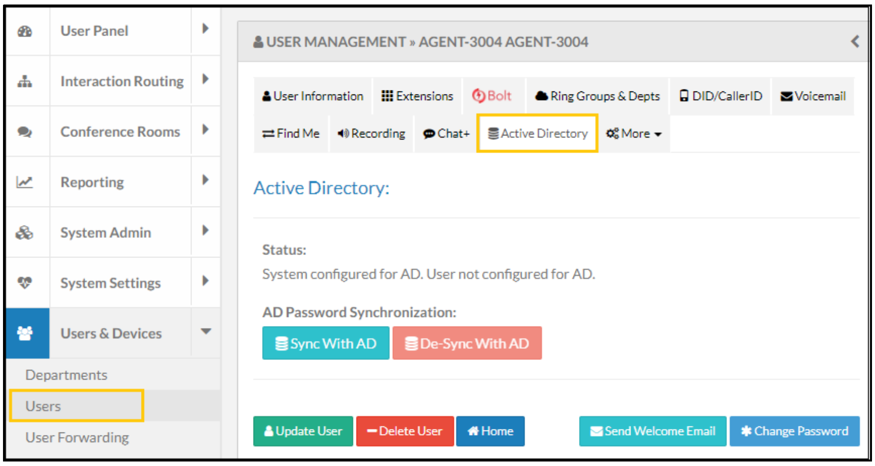
Click **Synchronize Users** to build all AD accounts for the users shown into Kerauno:



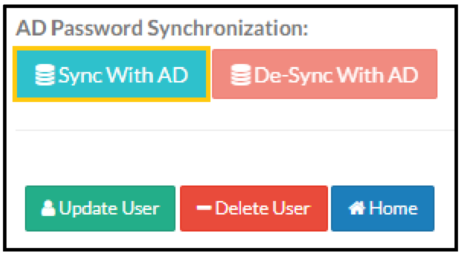
Users & Devices > Users > Active Directory tab

Syncing users from their individual Active Directory tab syncs only email/username with AD credentials.

Navigate to Users and Devices > Users. Select the user to add to AD and click the **Active Directory** tab:



Click **Sync with AD** to sync the user with AD.



An alert displays confirming success after syncing is successful. Click **Update User** and apply changes. The changes are available immediately in Kerauno.

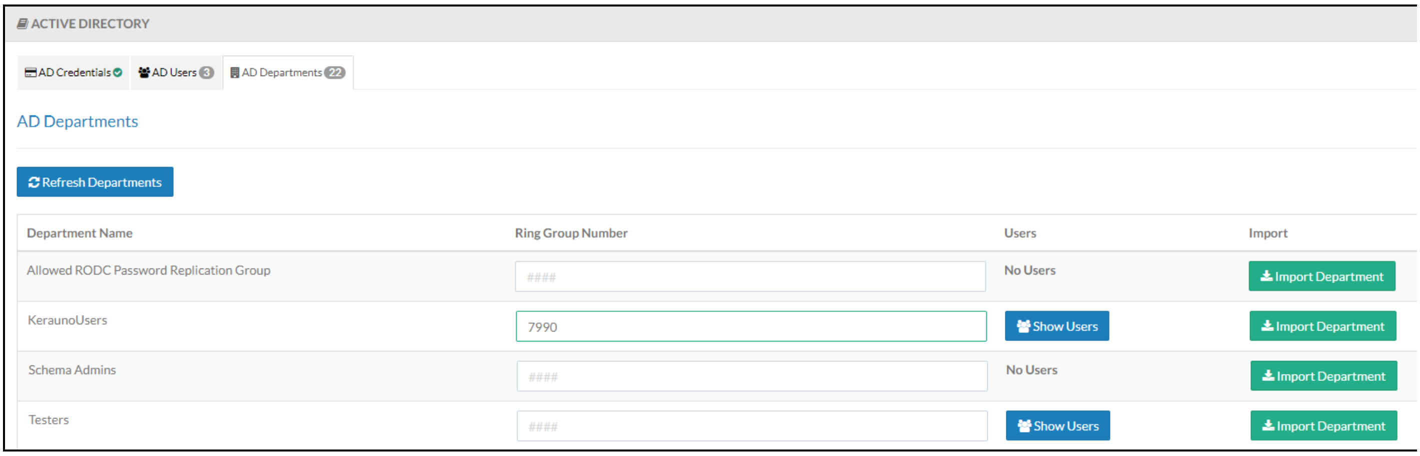
Syncing Departments

Manage Departments from the AD Departments tab in Kerauno. This is especially useful in high turn-over departments. Simply remove the user from AD and replace them with another employee. The changes are reflected in Kerauno immediately.

Navigate to Workflow Tools > Active Directory > AD Departments tab.

When adding a Department within AD, a Department and Ring Group are automatically created in Kerauno.

Assign a Ring Group Number to a Department and click **Import Department**:

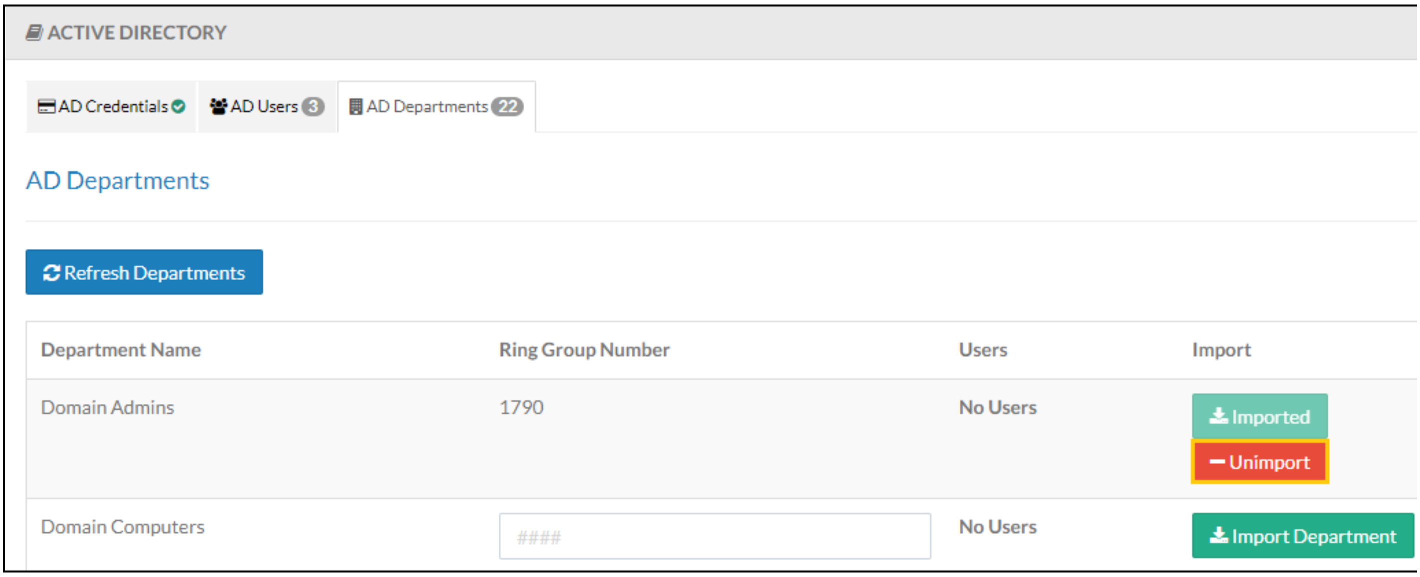


Departments operate the same way Kerauno Departments do. Departments can be dialed, display in the Phonebook, and can be used in Call or SMS Flows.

Users added to the Department appear as static within the created Ring Group and cannot be removed. Access the Department in AD directly to make any edits.

Note: Each AD Department must be assigned a Ring Group number, as AD

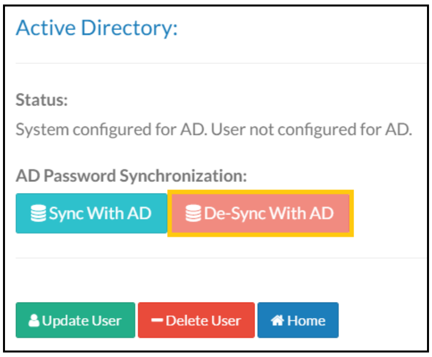
Use **Unimport** to remove a Ring Group. This removes both the Department and Ring Group from Kerauno.



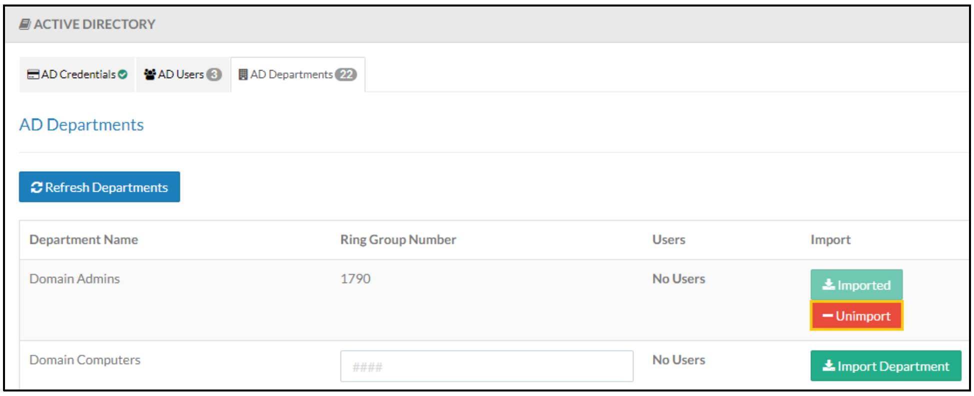
De-Syncing Users

Users can be de-synced through various methods:

- Remove the User directly from Active Directory.
- De-Sync button for Users & Devices > Users > AD Tab:



- Unimport Ring Group from Workflow Tools > Active Directory > AD Departments tab:



Troubleshooting

Error message received for Test AD Credentials.

Review the following parameters and try again:

- Check username and password
- Check network requirements Link to network requirements page

Error received while trying to sync a user:

The Import Conflicts column includes syncing error details. Correct the issue and try again.

Workflow Tools Overview

Last Modified on 10/03/2018 12:55 pm EDT

This document serves as a guide to utilizing the workflow tools in Kerauno. These tools allow for an almost limitless customization of functionality within the Workflow elements of Kerauno.

The features being addressed in the workflow articles are **Workflow Tags**, **Workflow Condition Configurations**, **Workflow Webhooks Configurations**, **Workflow Conditions**, **Workflow Webhooks**, and **Workflow Forms**.

All of Kerauno's data engine utilizes **Workflow Tags** to create a standard set of data for each workflow solution. Tags can be updated in a call flow/workflow via workflow webhooks or workflow forms. The tagging system allows for dynamic sets of data to be collected actively and passively throughout the platform. The collected data supplies the necessary information for the Kerauno reporting engine. **Workflow Tags** and **Componenets** are also variables (cannot contain underscores) in the Presence Screen-Pop functionality.

Setting Up & Maintaining Workflow Tags

To modify/create workflow tags in your system, you must first have administrator permissions to the module. Workflow tags are accessed via the **Kerauno Dashboard > Workflow Tools > Workflow Tags** module. When logging in, depending on the version of Kerauno and any add-on packages you are using, there may already be pre-defined workflow tags in the system.

Navigate to the **Kerauno Dashboard > Workflow Tools > Workflow Tags** module of your system. Your dashboard may be empty but it could look similar to Figure 01 below.

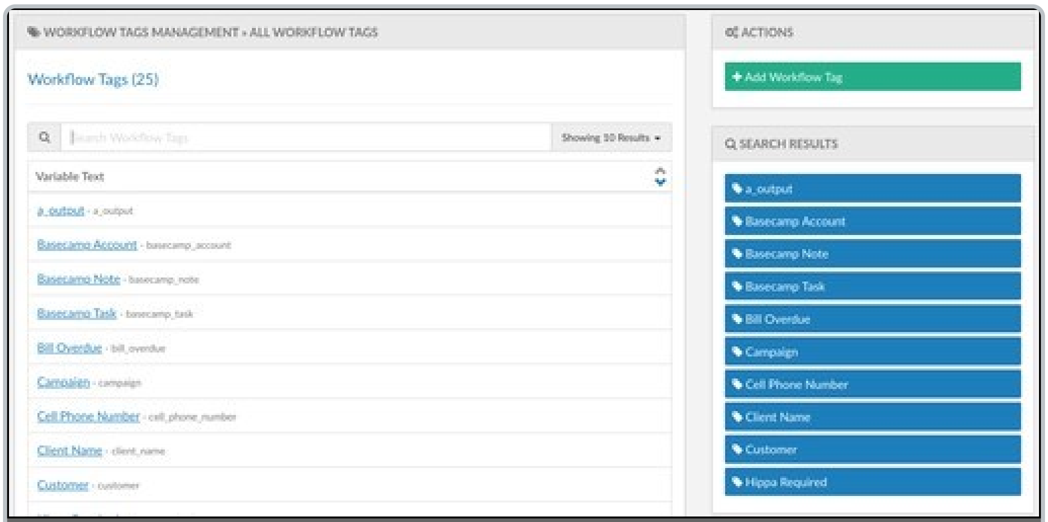


Figure 01 Workflow Tab Window

In the top-right press the + Add Workflow Tag button.

You will be prompted to fill in three (3) different inputs here:

- The **Variable Name** is the visual representation of the **Workflow Tag** throughout the entire platform.
- The **Variable** is the programmatic representation of the value in a workflow.

NOTE:	This variable will be auto-populated based on the variable name; it is highly recommended this is used unless you are an experienced user of workflows. These variables will be used later in **Workflow Conditions** and **Workflow Webhooks**.

- The **Notes** section is an internal identifier of free text the person building the workflow may use to keep notes on what this specific variable is doing in any given workflow or system integration.

Once you have filled out the form, click the + Add Workflow Tag button to add the new workflow tag to the system.

Congrats! You now have a functioning Workflow Tag in your Kerauno **Workflow Platform**.

How to Use Workflow Tags

Workflow Tags can be updated in many different parts of the Kerauno **Workflow Platform**. Outlined below are a few different places these tags can be updated:

- **Workflow Conditions**: Use **Workflow Tags** to determine the input compared to the conditional information.
- **Workflow Webhooks**: Able to use **Workflow Tags** to send input data from the agent to the webhook for use to then obtain input-based data.
- **Workflow Forms**: Utilize **Workflow Tags** by showing tagging data to the agent when a call is answered. **Tags** for a specific call can be set as well as dynamically modified when a user enters certain information into a **Workflow Form**. Using the tags within multi-form **Workflow Forms** allows data to be carried through from form to form.

Dragging & Dropping Workflow Tags in the Call Flow

You can drag-and-drop a **Workflow Tag** anywhere in a Kerauno **Call Flow**. These tags are statically updated based on the values assigned in the **Call Flow** tool.

To begin adding a **Workflow Tag** in a **Call Flow**, first navigate to the **Kerauno Dashboard > Call Routing > Call Flow** module.

In the right side of the **Call Flow Tool** there is an object called 

. Drag the selection anywhere in the **Call Flow** you would like to add it then drop the selected workflow tag to insert this new tag.

Once you've added the tag where you want it to be updated, you will be prompted with a form similar to Figure 02 below.

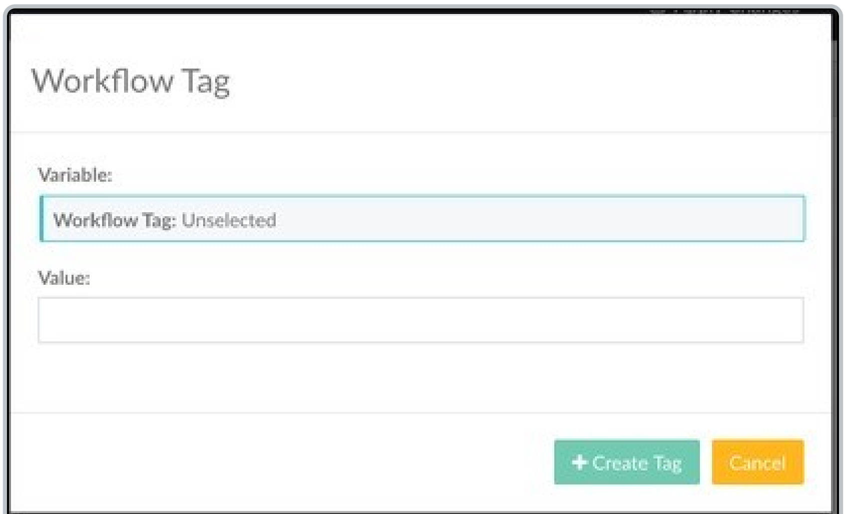


Figure 02 Workflow Tag Screen

In this form, you will select the variable that you want and assign a value to it. In the example illustrated in Figure 03 below, the **Campaign** workflow tag is set on all calls coming from this number to Google. This way it can be used later in Kerauno **Workflow Reporting**.

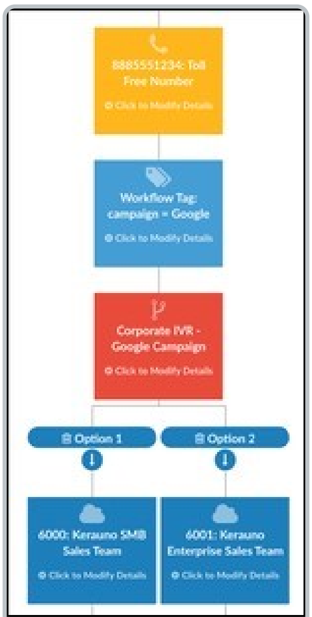


Figure 03
Workflow Tag

Adding Workflow Forms to Presence

Last Modified on 08/16/2019 2:42 pm EDT

Workflow Forms allow businesses to dynamically collect or update information in the call workflow within Presence.

To add a **Workflow Form** to a user's Presence **Dashboard**, first navigate to Presence by logging into Kerauno and selecting the **Presence** option from the navigation bar at the top of the **User Panel** as shown in Figure 01 below.

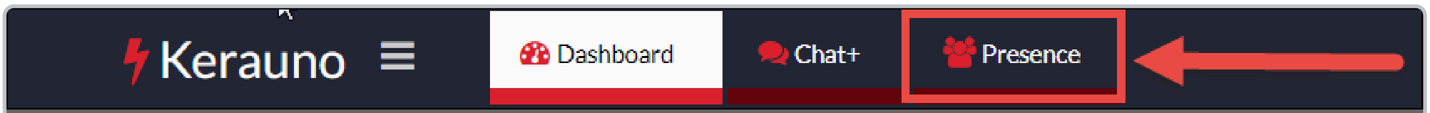


Figure 01: Presence Option in Kerauno

After selecting the **Presence** option from the dashboard, the Presence application will be displayed when loaded. Please note that the **Workflow Form** widget can be added both as a "panel" within an existing dashboard, or as its own dedicated dashboard.

NOTE:	It is recommended that you add the **Workflow Form** as its own dedicated **Dashboard** to increase text size and improve usability.

Adding a Workflow Form as a New Dashboard

First, begin by adding a new **Dashboard** to **Kerauno Presence**. To do this, select the icon in the upper-right corner of the Presence application as shown in the in the Figure 02 below. The default dashboard name upon creation is "Dashboard 1" (the number increases as more dashboards are created). After creation, the dashboard name can be modified by selecting the icon, entering the desired name (Example: WorkFlow Dashboard), and clicking **OK**. The newly created dashboard will, by default, have one panel in which the **Workflow Forms** widget can be added.

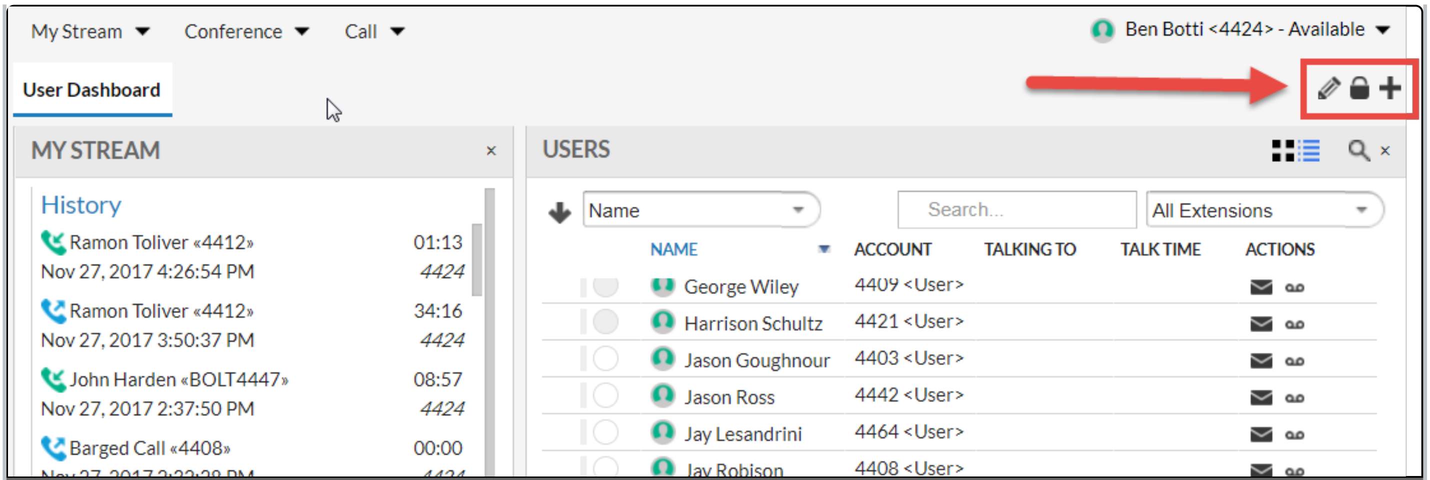


Figure 02: User Dashboard

Adding the Workflow Form Widget to a Dashboard

The following method can be used to add the new **Workflow Form** widget to an existing or new dashboard. The **Workflow Form** tool utilizes the **CRM** widget within Presence to show and display relevant information. Adding the **CRM** widget to a dashboard is the first step in utilizing the **Workflow Form** tool.

To do this, first select the ⊞ on an existing or new dashboard. This page will open a dialogue in which you will be asked to select a specific type of widget to add to the dashboard. Select the **Customer Management** option from the sidebar, then select **Add to Dashboard** as shown in Figure 03 below.

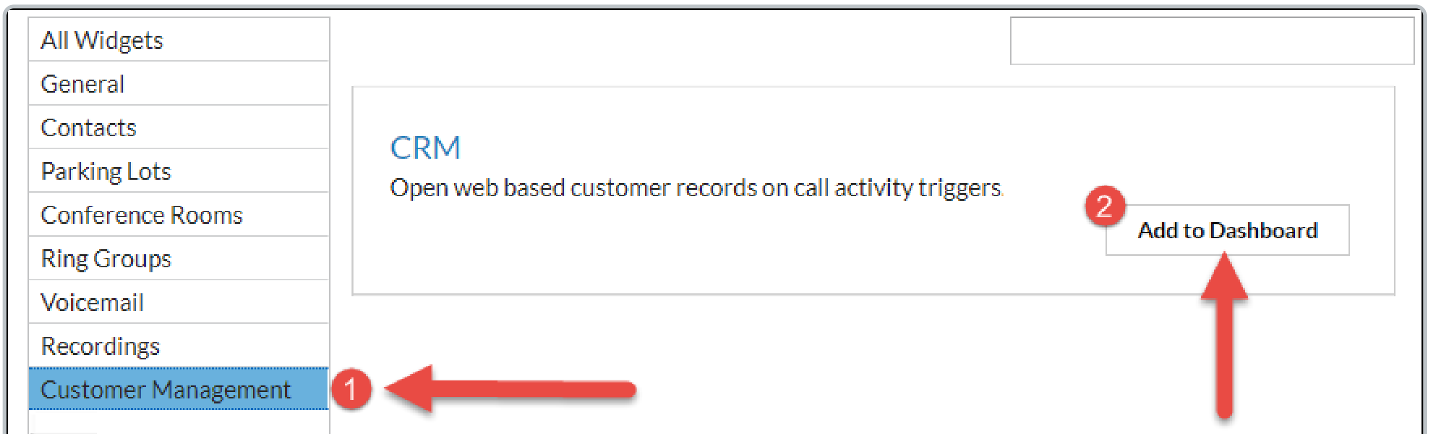


Figure 03: Adding Customer Management Widget

After selecting **Add to Dashboard**, a configuration screen displays which can be used to show the appropriate **Workflow Forms** information. Configure this pop-up as shown in the Figure 04 below. If you leave this menu accidentally, it can be re-accessed by selecting the icon in the upper-right corner of the dashboard.

1. **Name**: Enter a recognizable name for your form.
2. **Type**: Select **Web.**
3. **Open**: Select **Always**. This will ensure that the **Workflow Form** will appear on all calls.
4. **URL**: In this field, enter the URL you use to access the system followed by **/#/pages/disposition?frame=true.**

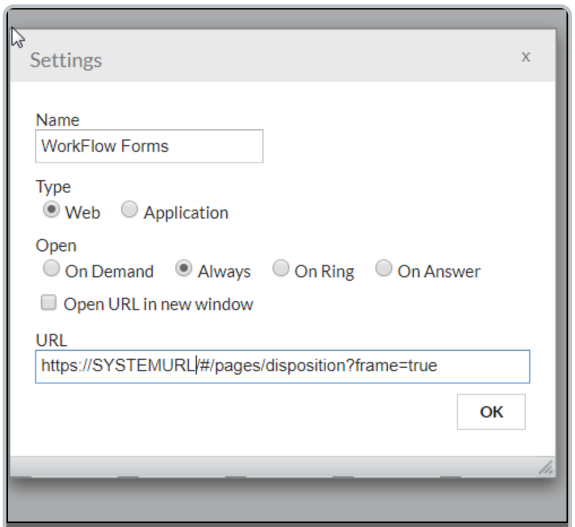


Figure 04: Workflow Form Configuration Settings

URL Example: If system URL is abccompany.ntegrated.com, URL entered will be http://abccompany.ntegrated.com/#/pages/disposition?frame=true.

NOTE:	Don’t forget to enter either **http://** or **https://** in front of the entered system name in the URL

If the setup is successful, you should see the panel filled with a screen *similar* to Figure 05 on the right. This form will change based on the types of calls being received and will allow users to start taking full advantage of **Workflow Form** functionality.

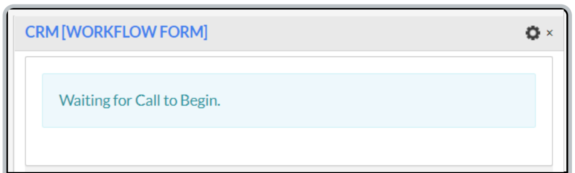


Figure 05: Workflow Form

Conditional Operators

Last Modified on 09/14/2018 10:39 am EDT

Conditional operators are used in **Workflows** to perform operations.

IS EQUAL TO: will compare whether **Workflow Tag** is equal to the **Comparison Value**.

Workflow Tag = 1 & Comparison Value = 1 would result in TRUE

IS LESS THAN: will compare whether **Workflow Tag** is less than the **Comparison Value**.

Workflow Tag = 1 & Comparison Value = 1 would result in FALSE

IS LESS THAN OR EQUAL TO: will compare whether **Workflow Tag** is less than or equal to the **Comparison Value.***

Workflow Tag = 1 & Comparison Value = 1 would result in TRUE

IS GREATER THAN: will compare whether **Workflow Tag** is greater than the **Comparison Value**.*

Workflow Tag = 1 & Comparison Value = 1 would result in FALSE

IS GREATER THAN OR EQUAL TO: will compare whether **Workflow Tag** is greater than or equal to the **Comparison Value**.*

Workflow Tag = 1 & Comparison Value = 1 would result in TRUE

IS NOT EQUAL TO: will compare whether **Workflow Tag** is not equal to the **Comparison Value**

Workflow Tag = 1 & Comparison Value = 1 would result in TRUE

IS TRUE: will compare whether **Workflow Tag** is equal to "1" or "true"

Workflow Tag = 1 would result in TRUE

IS FALSE: will compare whether **Workflow Tag** is equal to "0" or "false"

Workflow Tag = 1 would result in FALSE

IS EMPTY: will compare whether **Workflow Tag** is blank.

Workflow Tag = 1 & Value = 1 would result in FALSE

IS NOT EMPTY: will compare whether **Workflow Tag** is not blank.

Workflow Tag = 1 & Value = 1 would result in TRUE

NOTE:	*If this is a string comparing to a number this will always evaluate as true.

How Workflow Forms Work

Last Modified on 10/01/2018 10:06 am EDT

Workflow Forms are utilized to collect data about a call based on what the user inputs through the **Presence** module. To set up the **CRM Module** for use with your **Workflow Forms** in the **Presence** module follow the steps listed below.

Navigate to the **Presence** module and decide where in your dashboard you would like your **CRM** to live. Once you have selected the location, click the button.

Navigate to the **Customer Management** tab. Under **CRM**, click the Add to Dashboard button.

You will be propmpted for the following fields:

- **Name**: The name of this CRM widget. This name is used to identify which CRM window to open when using the **Open CRM** button in **My Stream**.
- **Open**: Specifies when to open the specified URL.
    - **On Demand**: This will be available from the **My Stream Widget** using the icon.
    - **Always Ring**: Opens when you have an incoming ringing call.
    - **Answer**: Opens when you answer an incoming call.
    - **Open on calls from internal extensions**: When checked the specified URL will open on calls from internal extensions.
    - **Open URL in new window**: When checked the specified URL will open in a new browser pop-up window instead of inside the widget. This can be used for web pages that do now allow themselves to be embedded in iframes.
- **URL**: The URL to set up your **Workflow Form** tool within the widget, the URL to input is similar to https://testaccount.kerauno.net/#/pages/disposition?frame=true where https://testaccount.kerauno.net would be your Kerauno URL.

Once it is all set up, when looking at the **CRM Widget** with no active call, you should see something similar to Figure 1 below:

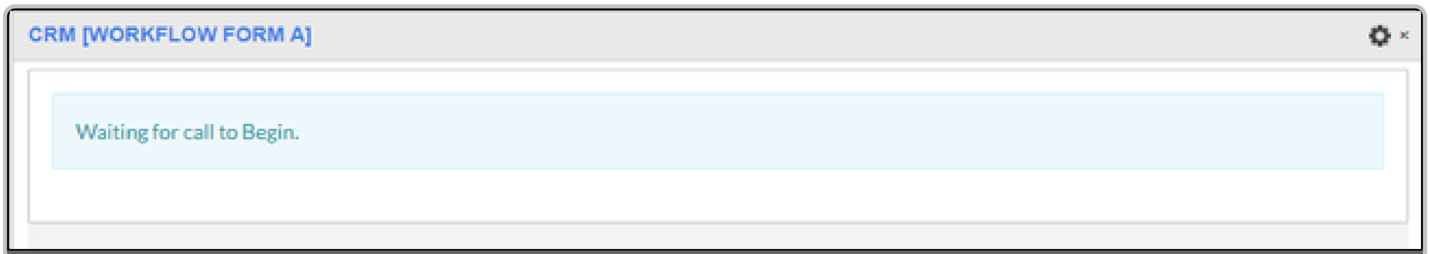


Figure 1 CRM (Workflow Form A)

NOTE:	Based on your selection in the **Open** section when setting up your **CRM Widget**, this may or may not be visible without further action from the user.

When a call is active and there is no **Workflow Form** associated with the **Call Flow**, you should see a screen similar to Figure 2 below:

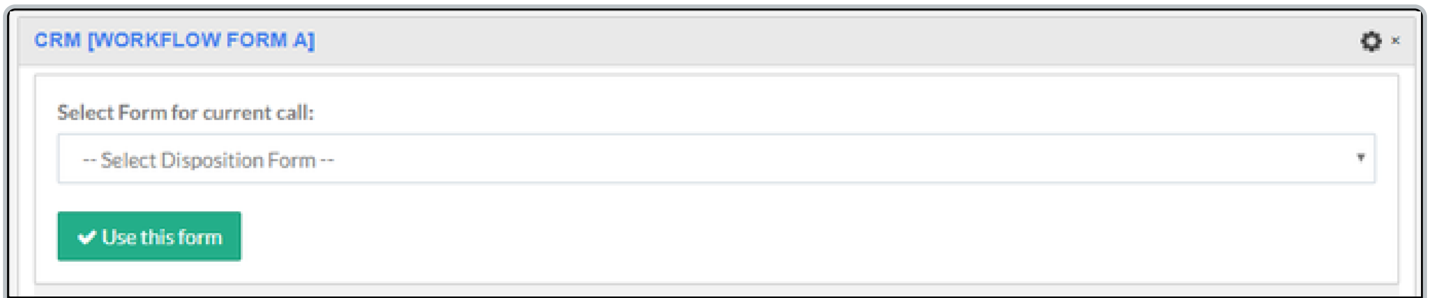


Figure 2 No Workflow Form Associated

NOTE:	Based on your selection in the **Open** section when setting up your **CRM Widget**, this may or may not be visible without further action from the user. This screen will not be available if a specific **Workflow Form** is selected in the **Call Flow Tool** and the call is following that specific **Call Flow**.

After a **Workflow Form** has been selected (or is auto-populated based on a **Call Flow**), you should see your active **Workflow Form** in the **CRM Widget**.

The user will then be able to input data into the **Workflow Form**. This data is submitted when the user presses the 

button or after the call has ended and another call has been accepted. The data input is available for analytics in the **Reporting > Workflow Forms**.

- When the data has successfully been submitted, you will see a confirmation message at the top of the **CRM Widget** that looks similar to Figure 3.

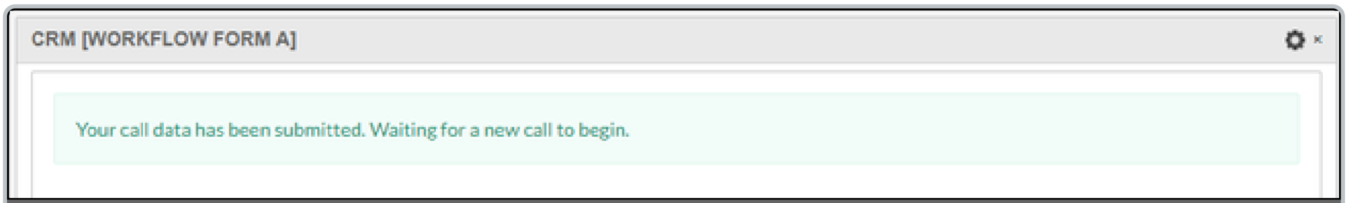


Figure 3 Data Successfully Submitted

Congrats! You now have a completed **Workflow Form** saved in your Kerauno Workflow Platform.

Dragging & Dropping Workflow Forms in the Call Flow

Navigate to the desired **Call Flow** and find the **Workflow Forms** drop-down. Once the drop-down is selected, your list may be empty if you do not have any **Workflow Forms** saved or it may look similar to Figure 4 below.

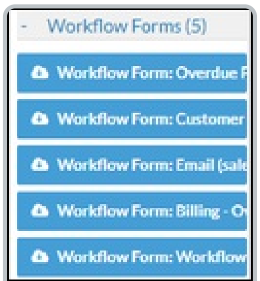


Figure 4 Workflow Forms List

Drag the desired **Workflow Form** into the **Call Flow** and drop it where desired.

NOTE:	Anything following the object that the **Workflow Form** is dropped into will be removed.

Setting a **Workflow Form** directly in a **Call Flow** will automatically open the **Workflow Form** when you are in the **CRM Widget** in the Presence module.

Next Form Functionality

Last Modified on 09/14/2018 10:33 am EDT

When this field is included in the **Workflow Form**, a button containing the provided label will populate within the form during an active call in the CRM module in the Presence **Dashboard**. This button gives you the ability to link multiple forms together and maintain the information from previous forms in future forms.

While the **Workflow Form** is still active in the dashboard of the Presence module, you can switch between the active **Workflow Form** and the previous **Workflow Forms** to view information, although information in previous **Workflow Forms** are non-editable. This button will only be functional if the **Go To Configuration** is properly set up and not left empty.

To set **Go To Configuration**, click the 

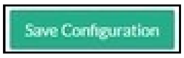
button. You will be prompted for the following fields:

- **Go To Form** sets the form that this button will redirect the user to.

NOTE:	This cannot be empty for the button to work properly.

- **Go To Condition** sets the condition configuration that will be required for the button to be functional.

NOTE:	This cannot be empty for the button to work properly.

Once both values have been selected, click the 

button.

Congrats! You now have a functioning **Next Form** button in your Kerauno **Workflow Platform**.

Workflow Conditions

Last Modified on 09/14/2018 3:26 pm EDT

Workflow Conditions are objects that reroute a call in the **Call Flow** tool, utilizing **Workflow Condition Configurations**, based on **Workflow Tag** current values. **Workflow Tags** and **Componenets** are variables (cannot contain underscores) in the Presence Screen-Pop functionality. In **Call Flows** these can be used in production environments to reroute calls to certain agents, certain ring groups, different IVRs or any other **Call Flow** object.

Setting Up & Maintaining Workflow Conditions

Navigate to the Kerauno **Dashboard > Call Routing > Call Flow** module of your system.

Select the route you would like to add a condition too.

You can drag and drop a **Workflow Condition** anywhere.

In the right side of the **Call Flow Tool** there is an object called 

. Drag-and-drop this selection anywhere in the **Call Flow** you would like to add a new workflow condition.

Once you land on where you want the tag to be updated, you will be prompted with the form illustrated in Figure 01 below.

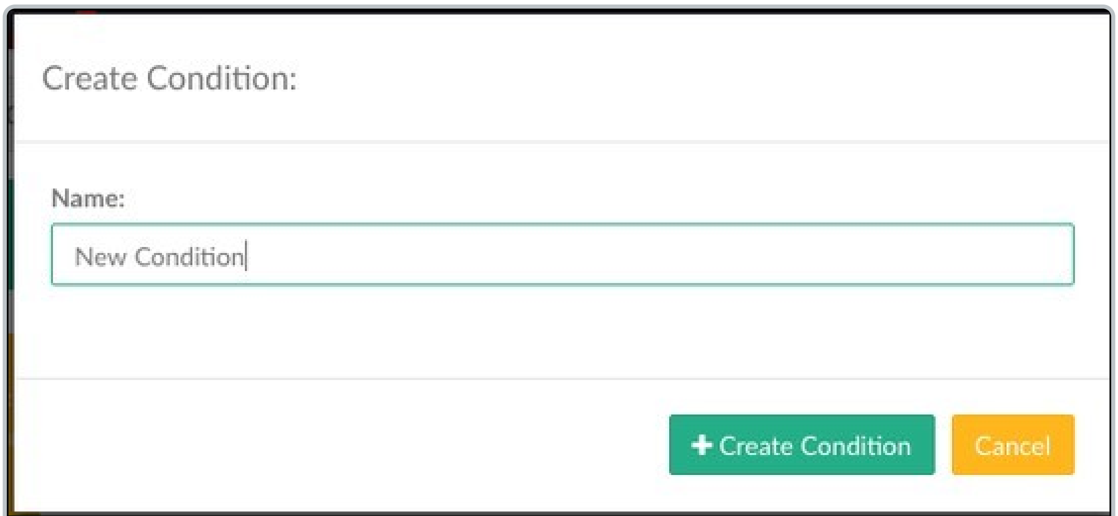


Figure 01 Create Condition Screen

Simply fill out the name of the condition for visual representation in the **Call Flow Tool**. Once this is completed, you can drag destinations in the **Call Flow Tool**.

To add a condition and destination, drag-and-drop the destination from the call flow objects on the right. You will be prompted with a screen similar to the one illustrated in Figure 02 below.

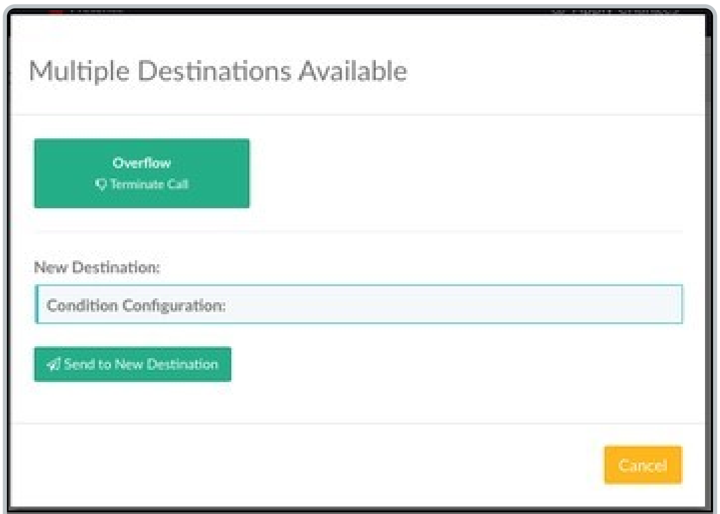


Figure 02 New Destination

From here you have two options, you can make it the **Overflow** (conditions are executed left to right depending on the UIs representation, then if no conditions match the call is routed to overflow).

Add to **Overflow** (or an existing option on a condition with already existing choices).

Create a new destination:

Click the **Condition Configuration** box to select a new **Condition Configuration** to send the call too.

Click the 

to send the caller to your destination when this condition is met.

TIP:	To update the order in which conditions are assessed on an incoming call, you can drag and drop the labels of the condition to switch them.

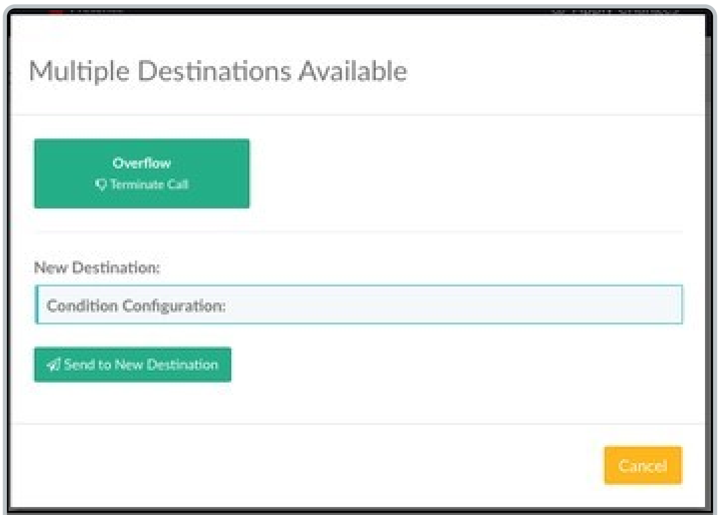


Figure 03 New Destination

Congrats! You now have a functioning **Workflow Condition** in your Kerauno Workflow Platform.

Workflow Condition Configurations

Last Modified on 09/14/2018 2:45 pm EDT

Workflow Condition Configurations are statements that can be utilized in **Workflow Conditions** and **Workflow Forms**. These are generic statements that can be used to alter the way **Work Flows** and **Call Flows** operate. **Condition Configurations** are all **Workflow Tag**-based and are a series of comparisons. **Workflow Tags** and **Componenets** are variables (cannot contain underscores) in the Presence Screen-Pop functionality.

Setting Up & Maintaining Workflow Webhook Configurations

Navigate to the Kerauno **Dashboard > Workflow Tools > Webhook Configurations** module of your system. Your dashboard may be empty but could look similar to the screen dislayed in Figure 01 below.

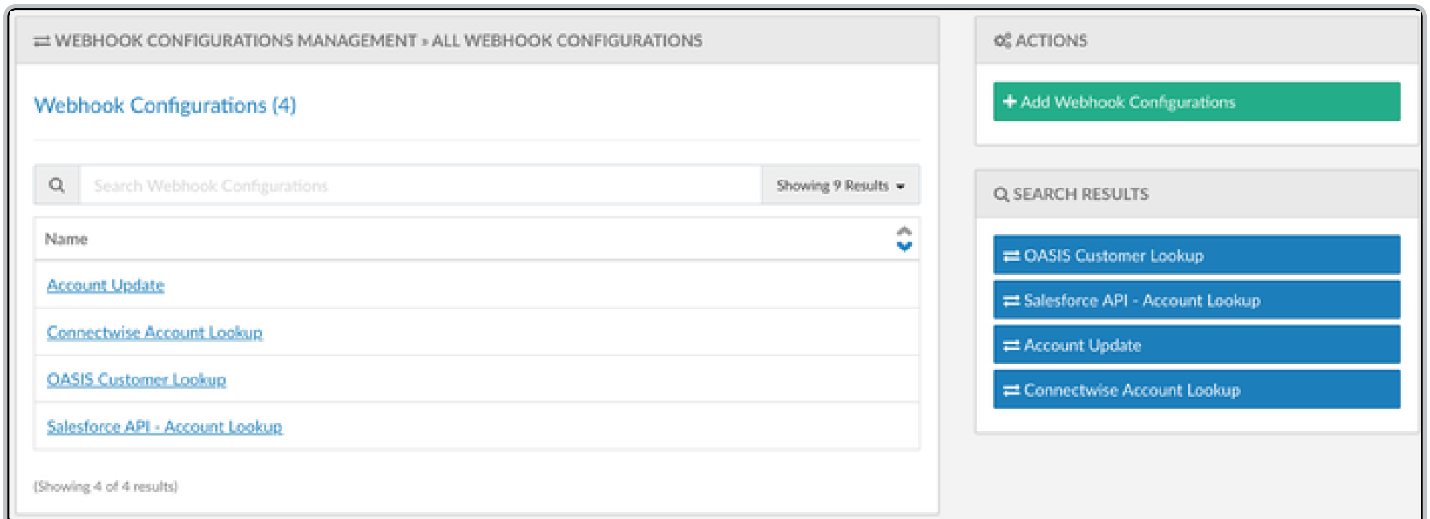


Figure 01 Webhook Configurations Management

In the top-right press the 

button.

You will be prompted to fill in three different inputs here:

The **Name** is the visual representation of the **Workflow Condition** throughout the entire platform.

The **Conditions** are a series of logical statements that evaluate as true or false depending on the state of the workflow. There are three inputs per condition (and you can have unlimited conditions per configuration).

- **Workflow Tag** is what is being compared.
- **Condition Operator** compares **Workflow Tag** to the **Comparison Value**. (See Conditional Operators).
- **Comparison Values** is compared against the **Workflow Tag** & **Condition Operator**.

Once you have filled out the form, click the 

button to add it to the system.

Congrats! You now have a functioning **Workflow Condition Configuration** in your Kerauno Workflow Platform

How Webhook Configurations Work

Webhook Configurations are utilized in **Workflow Forms** and **Workflow Webhooks**. When a **Workflow Webhook Configuration** is utilized it sends the current set of tags in the data payload to the url utilizing the request method. The response of the API is then utilized to consume two sets of data, the first set is the tags array and the second set is the option lists.

The tags will be added to the existing workflow; existing tags are updated.

The options will be saved for the existing workflow as a set of options for clients to choose from. (These can be loaded in **Workflow Forms** as select lists.)

Example Data Sent to Server:

{

- "dialed_number":"+13175556194",
- "caller_id":"\"Indianapolis IN\" <+13175554447>",
- "source":"+13175554447",
- "destination":"+13175556194",
- "duration":"0",
- "disposition":"NO ANSWER",
- "unique_id":"1519908729.1583",
- "campaign":"Google"

}

Example Response from Server:

{

- "tags":{
  - "partner":true,
  - "level":"platinum",
  - "customer":"04fda7d95403ca5b687269820ebde78e"

},

- "options":{
  - "customers":{
    - "658c9c074ae8391f20d0da57e8ddcd24":"Customer 0 (Account #6053-157)",
    - "a71ffb4f966304a0f78adeb0f6ccd21c":"Customer 1 (Account #8685-921)",
    - "a3ab43bc31f48c4fdbda52b960ccdfe6":"Customer 2 (Account #6749-248)",
    - "9c71e17d5c62437c0c6b5851f1d6ccde":"Customer 3 (Account #9927-294)",
    - "12cffe7af39d3ed51c6eb9027ec6e484":"Customer 4 (Account #8342-739)",
    - "04fda7d95403ca5b687269820ebde78e":"Customer 5 (Account #3240-919)",
    - "e96f25fcb3d10b490d2ac5e34cb7ad20":"Customer 6 (Account #7004-283)",
    - "07cba7916b05ddb8253330d91df6a31c":"Customer 7 (Account #6076-216)",
    - "1b11a04a6dc63d3c2c05875db1884c15":"Customer 8 (Account #4890-546)",
    - "257e659394c1752a9e6985a3f974b27a":"Customer 9 (Account

```
            #7554-690)"
        }
    }
}
```

Workflow Forms

Last Modified on 09/14/2018 3:24 pm EDT

Workflow Forms are interactive forms that are populated in the Presence module while a call is active. They allow for in-depth analytics by incorporating **Workflow Tags** and **Workflow Webhook Configurations** that are tied to the **CDR** of the call.

Setting Up and Maintaining Workflow Forms

To modify/create workflow forms in your system, you must have the proper permissions to the module as an administrator. The forms are accessed via the Kerauno **Dashboard > Workflow Tools > Workflow Forms** module.

Your dashboard may be empty but could look similar to Figure 1 below.

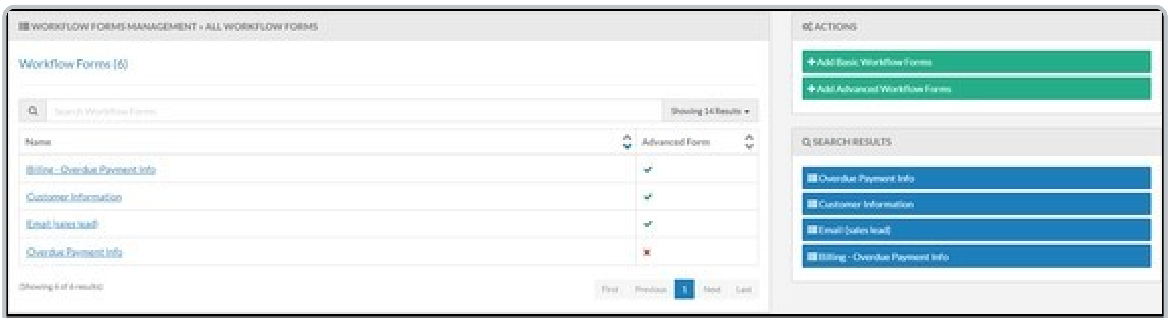


Figure 1 Workflow Forms

On the top-right, press the 

or 

button.

Advanced Workflow Forms include the ability to include pre- and post-webhooks (see [Webhook Configurations] for more information).

You will be prompted to add a name for the workflow. Click the 

button to save.

Click the name from your dashboard to open the **Management** page.

When a field is selected from the right, it will be added to the bottom of the form. You also have the option to drag a field onto the form and place it where you prefer it to be inserted. When adding a field, the previous field's edit view will get minimized and the edit view for the new field will be displayed.

While the Edit view is open on any field, you can click the **Close** button to minimize the Edit view and see what that field will actually look like in a live workflow form.

Field Configuration can be added to any field by clicking the button. You will be prompted to select from viewing options (show, hide, required, not required) and to select a condition (see Workflow Condition Configurations > Workflow Condition Configurations Within Workflow Form Maintenance for more details). Multiple conditions can be added.

When the Edit view is closed on any field, you can open the Edit view by hovering over the field; a series of three buttons will display on the right side:

- **Edit**: Opens the Edit view.
- **Copy**: Duplicates the selected field (including all data already saved in that field).
- **Remove**: Removes the selected field from the **Workflow Form**.

NOTE:	This cannot be undone; the entire field will change to a shade of red when this button is hovered over, make sure you really want to remove this field

The order of the fields can be changed by dragging and dropping a field to a different location on the **Workflow Form**.

The following form fields will be available to add to your form:

- **Header** is a label that will show on the **Workflow Form** itself; it does not take any input from the user. You can change the size of the **Header** by selecting a font type; h1 is the largest header size available while h3 is the smallest header size available.
- **Paragraph** is a block of text that will show on the **Workflow Form** itself; it does not take any input from the user. You can change the way that the text appears on the form by selecting an option in the **Type** dropdown.
- **Text Field** is an input filed meant to receive small amounts of data. The field will appear as a single line-wide box.
  - **Required** will invalidate the form while the input is blank if this option is selected.

- **Label** is the label that will appear above the input field on the **Workflow Form**.
- **Tag** is the **Workflow Tag** that is associated with this text field; this data will be searchable in the analytics. **Workflow Tags**, and **Componenets**, are variables (cannot contain underscores) in the Presence Screen-Pop functionality.You can either select from a previously created **Workflow Tag** or you can create a new **Workflow Tag**.
- **Type** will set the type of input that the field will accept.
- **Max Length** is the maximum number of characters the field will accept.

- **Text Areas** are input fields that accept larger amounts of data; the field will appear as a sever line-wide box.

  - **Required** will invalidate the form while the input is blank if this option is selected.
  - **Label** is the label that will appear above the input field on the **Workflow Form**.
  - **Tag** is the **Workflow Tag** that is associated with this text field; this data will be searchable in the analytics. **Workflow Tags**, and **Componenets**, are variables (cannot contain underscores) in the Presence Screen-Pop functionality. You can either select from a previously created **Workflow Tag** or you can create a new **Workflow Tag**.
  - **Type** will set the type of input that the field will accept.
  - **Max Length** is the max number of characters the field will accept.

- **Select** fields are input fields that populate a drop-down from the set options.

  - **Required** will invalidate the form while the input is blank if this option is selected.
  - **Label** is the label that will appear above the input field on the **Workflow Form**.
  - **Tag** is the **Workflow Tag** that is associated with this text field; this data will be searchable in the analytics. **Workflow Tags**, and **Componenets**, are variables (cannot contain underscores) in the Presence Screen-Pop

    functionality. You can either select from a previously created **Workflow Tag** or you can create a new **Workflow Tag**.
  - **Options** are the manually input options that will be available to the user for selection.
    - The first input (left column) is the visual label that will be seen by the user.
    - The second input (right column) is the value that will be stored in the database; this value can contain no spaces.
    - The default number of options is 3, but more may be added by clicking the  button.
  - **Option List** can be set to an option sent through a webhook. If there is nothing that matches what is in the **Option List**, the **Workflow Form** will default to the options that were manually input.

- **Checkbox Groups** are input fields that allow for selection of multiple of the options.
  - **Required** will invalidate the form while the input is blank if this option is selected.
  - **Label** is the label that will appear above the input field on the **Workflow Form**.
  - **Tag** is the **Workflow Tag** that is associated with this text field; this data will be searchable in the analytics. **Workflow Tags**, and **Componenets**, are variables (cannot contain underscores) in the Presence Screen-Pop functionality. You can either select from a previously created **Workflow Tag** or you can create a new **Workflow Tag**.
  - **Inline** will display the checkbox in line with the option.
  - **Options** are the manually input options that will be available for selection to the user.
    - The first input (left column) is the visual label that will be seen by the user.

        - The second input (right column) is the value that will be stored in the database; this value can contain no spaces.
        - The default number of options is 3, but more may be added by clicking the 

 button.

- **Radio Groups** are input fields that allow for selection of a single option.
    - **Required** will invalidate the form while the input is blank if this option is selected.
    - **Label** is the label that will appear above the input field on the **Workflow Form**.
    - **Tag** is the **Workflow Tag** that is associated with this text field; this data will be searchable in the analytics. **Workflow Tags**, and **Componenets**, are variables (cannot contain underscores) in the Presence Screen-Pop functionality. You can either select from a previously created **Workflow Tag** or you can create a new **Workflow Tag**.
        - **Inline** will display the radio in line with the option if this is selected.
        - **Options** are the manually input options that will be available for selection to the user.
            - The first input (left column) is the visual label that will be seen by the user.
            - The second input (right column) is the value that will be stored in the database; this value can contain no spaces.
            - The default number of options is 1, but more may be added by clicking the 

 button

- **Number** fields are input fields that receive numerical values only.
    - **Required** will invalidate the form while the input is blank if this option is selected.
    - **Label** is the label that will appear above the input field on the **Workflow Form**.
    - **Tag** is the **Workflow Tag** that is associated with this text field; this data

    will be searchable in the analytics. **Workflow Tags**, and **Componenets**, are variables (cannot contain underscores) in the Presence Screen-Pop functionality. You can either select from a previously created **Workflow Tag** or you can create a new **Workflow Tag**.
  - **Min** is the minimum numerical value that will be accepted.
  - **Max** is the maximum numerical value that will be accepted.
  - **Date Fields** are input fields that receive date information only.A date picker will populate when this field is clicked on during an active **Workflow Form**.
    - **Required** will invalidate the form while the input is blank if this option is selected.
    - **Label** is the label that will appear above the input field on the **Workflow Form**.
    - **Tag** is the **Workflow Tag** that is associated with this text field; this data will be searchable in the analytics. **Workflow Tags**, and **Componenets**, are variables (cannot contain underscores) in the Presence Screen-Pop functionality. You can either select from a previously created **Workflow Tag** or you can create a new **Workflow Tag**.

- **Next Form** fields are a button that will become enabled when all required fields have been completed and will populate the next form once clicked.
  - **Required** will disable the submit button on the form if this option is selected; the user would be required to continue on to the next form before being able to submit the data.
  - **Label** is the label that will appear on the button on the **Workflow Form**.
  - Make sure to add **Go To Configuration** settings for this button to work properly (see Next Form Functionality for more information).

Once you have added the desired fields and completed all of the settings, click the 

button to add it to the system.

Congrats! You now have a functioning **Workflow Form** in your Kerauno Workflow Platform.

String Injection in the Paragraph Field

Within the **Paragraph** field, while the **Type** is set as 'p', you can take advantage of string injection. Using this functionality allows you to dynamically input data into your form to better assist your agents.

To use this functionality, you need to include the following text to allow the system to perform the string injection: ${workflow_tag_name} where 'workflow_tag_name' is the value assigned to the **Workflow Tag** that you desire to be injected into the text.

You may have a **Workflow Form** that looks similar to the example in Figure 2 below.

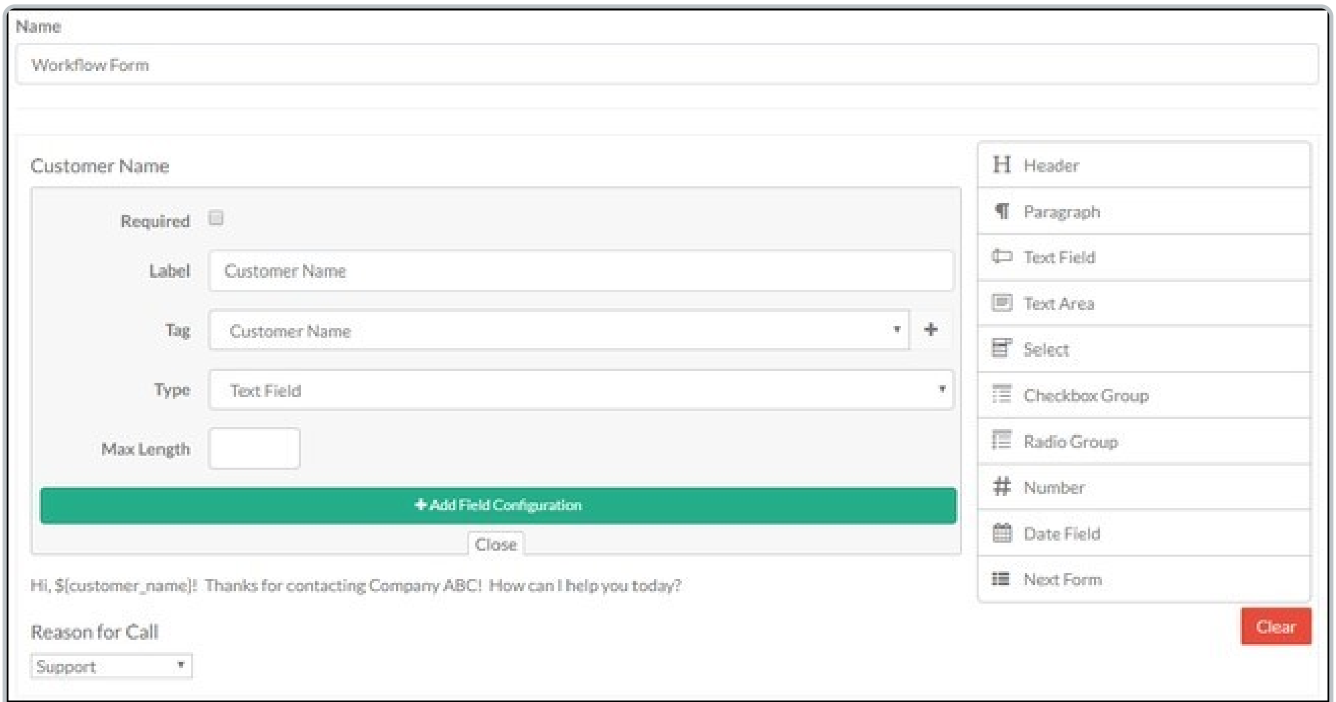


Figure 2 Workflow Form

When you are on the active call using this workflow, as you input data into the **Customer Name** field, that data will automatically be injected into your **Paragraph** field. Before data is input, it could look similar to Figure 3 below.

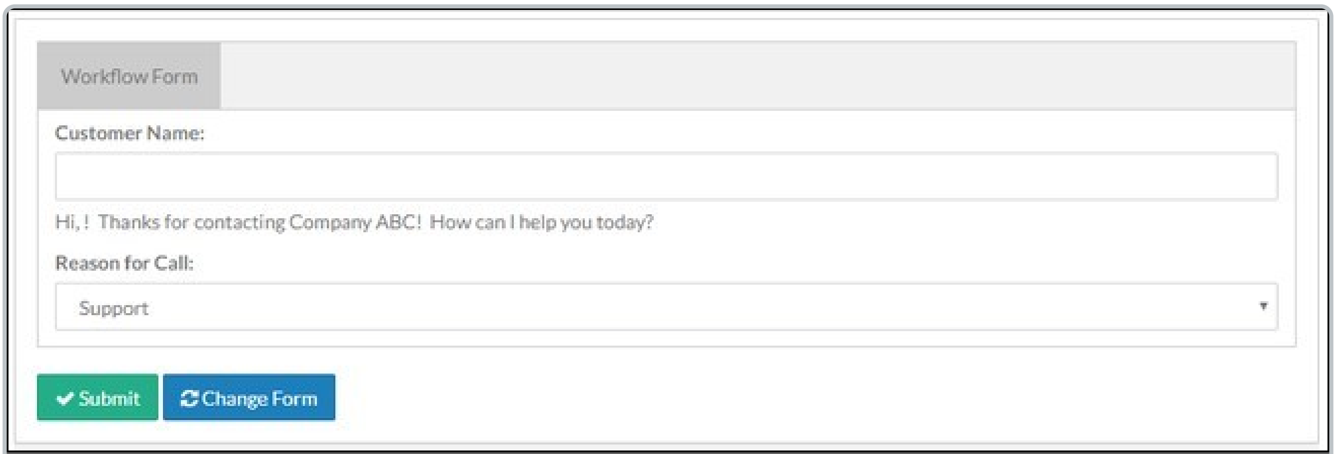


Figure 3 Workflow Form Prior to String Injection

After string injection, it would look similar to Figure 4 below.

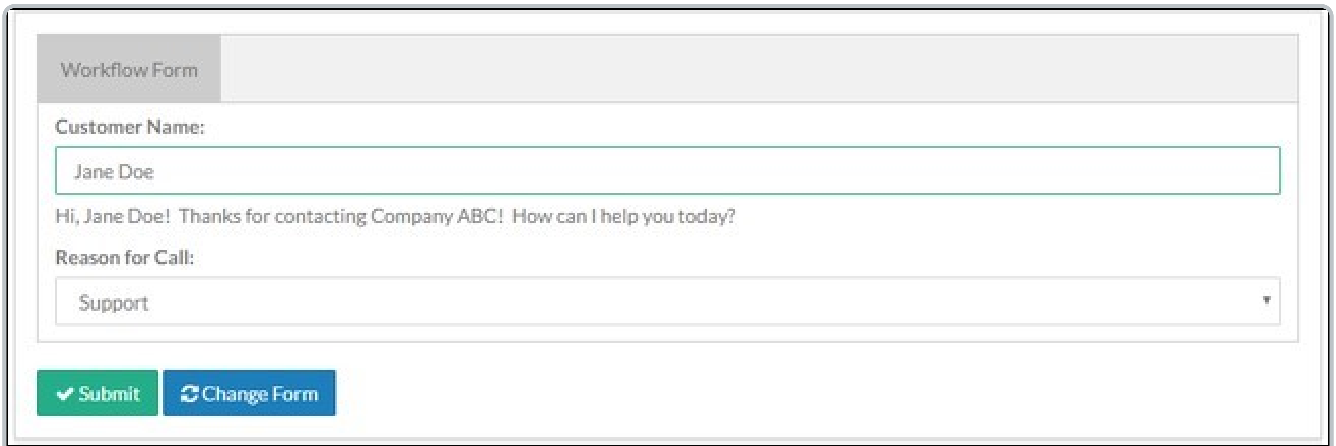


Figure 4 Workflow Form After String Injection

Using this functionality will enable you to provide visual cues to your agents. This is extremely helpful when the paragraph field is being used for scripting, the agent doesn't need to try to find the information elsewhere on the page, it can be automatically inserted into the script. This is also functional for use with multiple forms, where the tag information is set and you can reference a tag from a previous form in a future form using string injection.

Workflow Webhooks

Last Modified on 05/25/2018 2:57 pm EDT

A Webhook is a feature that allows for data to be sent to other systems or endpoints (URLs) delivers data to other applications as it happens. Workflow Webhooks are objects that change the current values of workflow tags in the Call Flow tool utilizing Workflow Webhook Configurations to reroute calls & work flows. In Call Flow, these can be used in conjunction with Workflow Conditions to reroute calls to certain agents, certain ring groups, different IVRs or any other Call Flow object.

Setting Up & Maintaining Workflow Conditions

Navigate to the Kerauno **Dashboard > Call Routing > Call Flow** module of your system.

Select the route you would like to add a condition too.

You can drag & drop a **Workflow Condition** as a destination to any object.

In the right side of the **Call Flow Tool** there is an object called 

. Drag and drop this selection over anywhere in the **Call Flow** where you would like to add a new webhook condition.

Once you land on where you want the tag to be updated, you will be prompted with a form similar to the one illustrated in Figure 1 below.

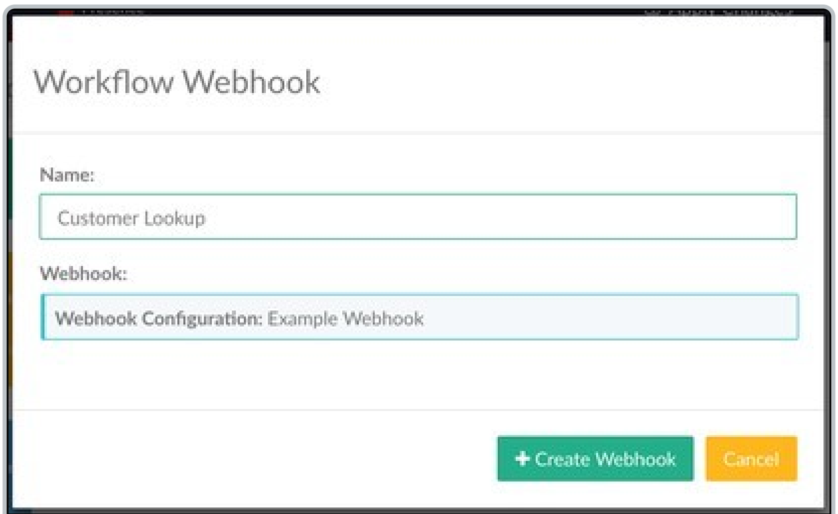


Figure 1 Workflow Webhook

- The **Name** is the visual representation of the webhook in the **Call Flow Tool**.

- The **Webhook** is a defined **Webhook Configuration** that you would like to trigger at this point in the call flow.

Congrats! You now have a functioning **Workflow Webhook** in your Kerauno Workflow Platform.

Server and Client Requirements

Last Modified on 09/27/2018 12:21 pm EDT

Keruno Information and Configuration References

On Premise Server Requirements for Kerauno 2.0

Device Requirements for Bolt Softphone (Desktop + Mobile)

Device Requirements for Bolt Softphone (Desktop + Mobile)

Last Modified on 07/25/2018 8:54 am EDT

Kerauno Bolt - Desktop Client System Requirements	
Processor	Minimum: Core 2 Duo 2.1 GHz Recommended: i5 / i7 2.4 GHz and above
Memory	Minimum: 4GB RAM Recommended: 8 GB RAM and above
Hard Disk Space	400 MB (Install/Upgrade, 200 MB operation)
Operating system	Windows 7 (SP1) Windows 8.1 (desktop mode) Windows 10 (creators update required) Mac OS X 10.11 (El Capitan) Mac OS X 10.12 (Sierra) Mac OS X 10.13 (High Sierra)
Connection	IP network connection (broadband, LAN, wireless); Constant/Reliable Internet connection

Kerauno Bolt - Android Client System Requirements	
Android Operating System	Android V4.4+ or Later
Hardware	Bolt has been tested on a wide range of Samsung, HTC, LG, Nexus, and Google devices. *Bolt may operate well on other non-certified devices*
Hard Disk Space	114.4 MB

Kerauno Bolt - IOS Client System Requirements	
IOS Operating System	Requires iOS 10.0 or later
Hardware	iPhone 5 or Later iPod Touch (6th Generation) iPad – (4th Generation or Later)
Hard Disk Space	114.4 MB

Supported Components & Certified Devices List

Last Modified on 04/08/2019 3:30 pm EDT

Review the following requirements for optimal Kerauno experience.

Kerauno Certified Devices List

Kerauno Information and Configuration References

Supported Desktop Operating Systems

- Windows 7/10
- MAC OS version 10.11, 10.12, 10.13, 10.14

Supported Web Browsers

- Chrome (version 64 or later)
- Firefox (version 24 and later)
- Safari (version 7 or later)
- Microsoft Edge (Enterprise Mode)
- Internet Explorer 11

Kerauno is mobile OS agnostic and can work on any device via browser.

Bolt Desktop Application Requirements

Bolt is supported on Android Phones/Tablets + Apple Phones/Tablets.

Kerauno Bolt - Desktop Client System Requirements	
Processor	**Minimum: Core 2 Duo 2.1 GHz** **Recommended: i5 / i7 2.4 GHz and above**

Memory	Minimum: 4GB RAM Recommended: 8 GB RAM and above
Hard Disk Space	400 MB (Install/Upgrade, 200 MB operation)
Operating system	Windows 7 (SP1) Windows 8.1 (desktop mode) Windows 10 (creators update required) Mac OS X 10.11 (El Capitan) Mac OS X 10.12 (Sierra) Mac OS X 10.13 (High Sierra)
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Kerauno Bolt - Android Client System Requirements	
Android Operating System	Android V4.4+ or Later
Hardware	Bolt has been tested on a wide range of Samsung, HTC, LG, Nexus, and Google devices. *Bolt may operate well on other non-certified devices*
Hard Disk Space	114.4 MB

Kerauno Bolt - IOS Client System Requirements	
IOS Operating System	Requires iOS 10.0 or later
Hardware	iPhone 5 or Later iPod Touch (6th Generation) iPad – (4th Generation or Later)
Hard Disk Space	114.4 MB

On-Premise Server Requirements

- 3.1 required updates for premise-based instances

Please contact support@keraunouc.com with any questions.

3.1 Required updates for premise-based instances

Last Modified on 03/06/2019 2:51 pm EST

Voicemail Transcription and SMS are reliant on external network connectivity to the Kerauno cloud in order to function properly. If external network connectivity is not established, Kerauno will still function as it had previously, however users may experience limited availability of SMS and Voicemail Transcription features.

External connectivity is required so that the Premise-based Kerauno instances can pass local data to services running in the Kerauno cloud. The functions of these services vary widely. However, one example of an action that might be performed is passing voicemail audio streams to the Kerauno transcription service to be translated into text.

In order to take advantage of these features, an additional Fully Qualified Domain Names (FQDNs) and port must be whitelisted in any on-premise firewalls, webfilters, or other network routing devices that affects network traffic. Please note that no additional whitelist entries are required to be added into the Kerauno Firewall. All appropriate Kerauno Firewall whitelist entries are automatically added upon the upgrade to 3.1.

Note: Kerauno system *must* have a valid SSL cert in order to utilize any of the below features that rely on Kerauno cloud services.

To allow the Premise-based Kerauno application to access supporting cloud services, the following FQDNs and associated ports must be whitelisted and have appropriate connectivity in the premise environment where Kerauno resides:

Feature	Description	Domain	TCP/IP Port
Voicemail Transcription	Manages transcription of audio files	api.kerauno.io	443 - HTTPS
SMS	Handles dispatch of inbound and outbound SMS messaging	api.kerauno.io	443 - HTTPS

Certified Devices List

Last Modified on 04/08/2019 3:58 pm EDT

Refer to the following link for all certified Kerauno devices:
https://www.kerauno.io/devices

Reporting Overview

Last Modified on 05/25/2018 10:04 am EDT

The reporting menu allows administrators and call center managers to view and analyze call traffic coming into the Kerauno phone system. This menu gives call center managers the ability to see inbound and outbound traffic, total call times, hold times, and much more.

The reports in this menu can be viewed in various ways. The row of green buttons on the top of each menu will allow managers to view, print, e-mail, schedule, or export reports (refer to Figure 01 below).

Figure 01: Reporting Menu Buttons

View Report: The **View Report** button will display the desired report in the Kerauno web interface.

Print Report: The **Print Report** button will export the report to a PDF file or print to a Local or Network Printer. If saved as a PDF file, the report may be saved on the user’s local PC.

Email Report: The **Email Report** button will allow call center managers to send the report to any other person via email. Simply run the report, hit the **Email Report** button and then type an email in the pop-up box that appears. The report will be sent as a PDF attachment to the email.

Schedule Reports: The **Schedule Reports** button will allow managers to set up reports to run daily, weekly, monthly, or quarterly. The reports will be automatically generated and appear to the specified user under the **User Panel à My Reports** menu. All scheduled reports will also be sent via email.

Export to CSV: The **Export to CSV** button allows managers to export a report to a .CSV format. The file will be downloaded locally and can be taken and analyzed further in Excel, Crystal Reports, etc.

Call Recordings

Last Modified on 10/03/2018 2:47 pm EDT

The **Call Recordings** menu allows administrators or call center managers to listen to and download recorded calls. There are two ways to configure which calls are to be recorded. The **Call Recording** option under the **Users & Devices** > **Users** menu enables the ability to record for a specific user. The **Ring Group** recording option under **Call Routing > Ring Groups** enables any ring group call to be recorded, regardless of which agent or extension answers the call.

NOTE:	All call recordings are only saved on the system for 30-90 days. This paramater is configurable via **System Settings -> Advanced Settings** menu. The **default** setting is 30 days retention. If you would like to keep call recordings for greater than 30 days, you must use a remote storage destination. For more information refer to [Remote Storage]().

The **Call Recordings** menu operates similarly to the **CDR Logs** menu in that it presents a searchable list of call records in the system. These records are searchable by date and recording source.

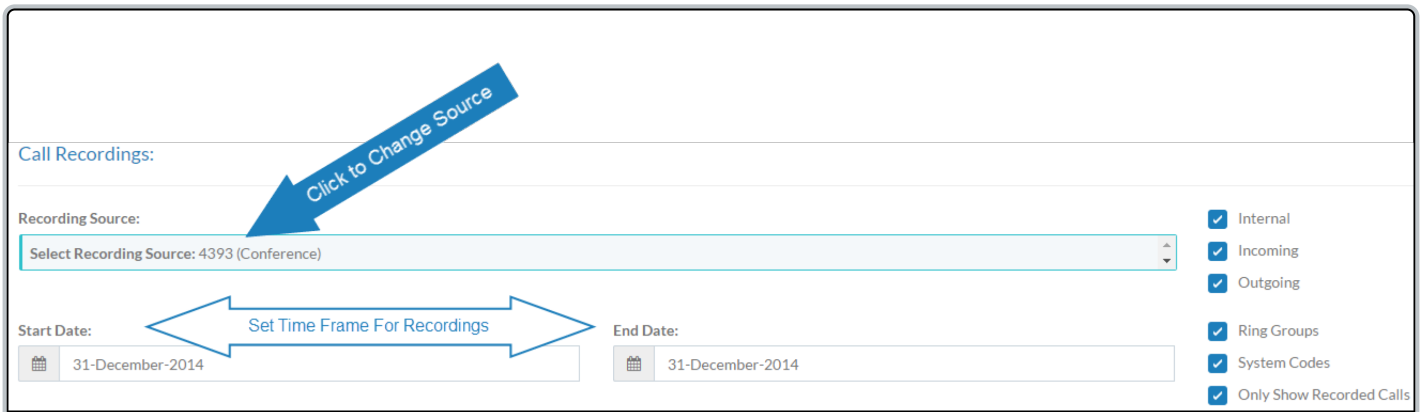


Figure 01: Call Recordings Search Example

To run a report, click the **Select Recording Source** button and choose the desired source. Be sure to include a specific time frame for this particular report as shown in **Figure 01**. Please note that Users, Ring Groups, Conference Bridges, and Trunks can all be selected as a recording source.

After setting a search criteria and selecting the **View Report** button, a table will display with all call record information and available recordings for the chosen time frame and selected recording source (Ring Group, Specific User, Conference, or Trunk). Selecting **View Report** will display the report in your browser, however reports can also be scheduled and emailed from this menu as well.

The illustration in Figure 02 is an example of the **Call Recordings** report. This report includes the **Date/Time of the Call**, **Type of Call**, **From Caller ID**, **To Caller ID**, **Destination** (Ext. that received the call), **Call Duration**, and **Trunk**.

The last two columns of the table will display a **Download** button, as well as an in-line media player. The **Download** button will allow the file to be downloaded to a local hard drive in a .wav format. The **Play** button on the in-line media player will allow the recording to play within the browser.

NOTE:	If a .wav file is larger than 10MB (~10 minutes), the inline media player will not be displayed. Larger recording files must be downloaded and then played via audio/media software (ex: Windows Media Player, VLC, etc.).

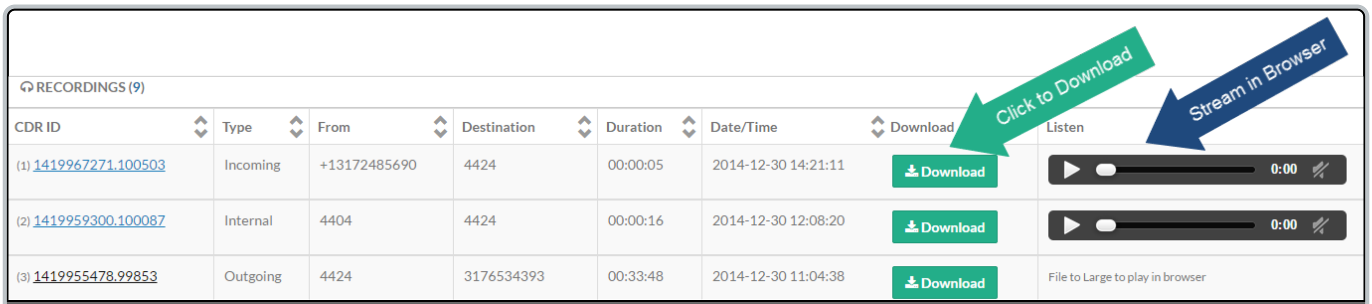


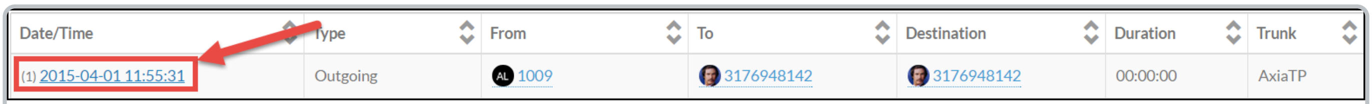
Figure 02: Call Recordings Report

In-Call Analytics

Last Modified on 05/25/2018 10:06 am EDT

In-Call Analytics Reports can be accessed by clicking a **Call Date/Time** anywhere in the **Reporting** menu or from user's **My Calls** menu on the user panel. **In-Call Analytics** will show exactly how the call was routed through the phone system. For example, if the call was transferred, put on hold, etc. This is a great tool for call center managers who want to see every granular detail about a particular call.

To access in call analytics, simply click on a **Call Date/Time** in any of the reporting menus on any CDR Record as shown in Figure 01 below.



Date/Time	Type	From	To	Destination	Duration	Trunk
(1) 2015-04-01 11:55:31	Outgoing	AL 1009	3176948142	3176948142	00:00:00	AxiaTP

Figure 01: CDR Record Reporting Menu

Clicking any **Date/Time** will take the user to the **In-Call Analytics** screen where all information about the call will be displayed. Information on this page will include basic call detail information (such as time of the call, duration, etc.) and will also include a chart that details specific occurrences within the call.

Each section of the chart is color-coded based on what is happening inside of the call (refer to Figure 02 below).

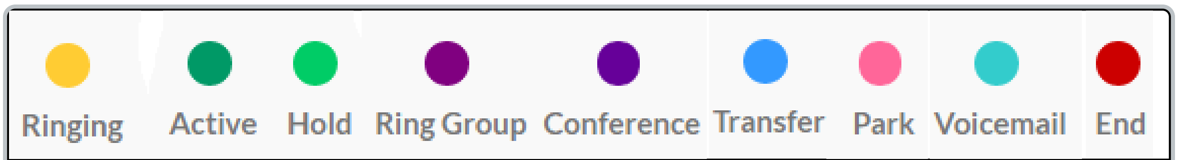
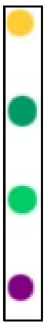


Figure 02: Call Chart Color-Coding



Ringing – Call hears a **ringing tone** while the call initiates

Active – Active two way audio between caller and agent

Hold – Agent has put a caller on a **Local Hold**. Caller will hear default hold music.

Ring Group – Call has entered a ring group. Caller will hear music on hold and ring group messages if configured.

Conference – Agent has initiated a local conference call or called into an Ad-Hoc or Leader-Based Kerauno Conference Room.

Transfer – Call has been transferred to another extension. Both blind and assisted transfers are shown within the chart.

Park – Call was placed into a parking lot.

Voicemail – Call was placed into an extension's voicemail box.

End – Call was terminated by either the agent or caller.

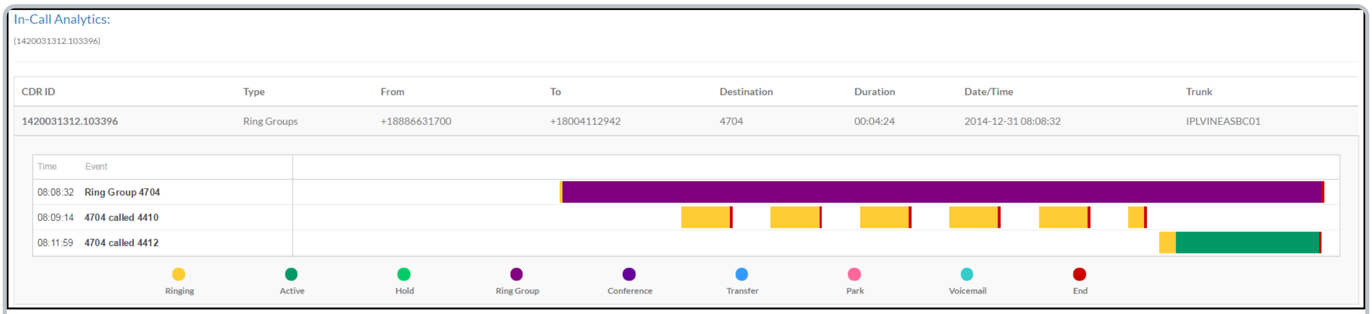


Figure 03: In-Call Analytics, example 01

In the above call example:

- The call initiated at 8:08:32 and first was placed into **Ring Group 4704**.
- The ring group then made an attempt to dial agent 4410 at 8:09:14. The phone rang 5 times before moving on to the next agent.
- Because there was no answer at agent 4410, the ring group dialed agent 4412 (the second agent in the group) at 8:11:59. Agent 4412 picked up after one ring and spoke with the caller after which one of the parties terminated the call.

NOTE:	Hovering over any color-coded segment will display the approximate time, in seconds, of the activity which occurred in that portion of the chart.

This hover functionality is detailed in figure 04 below.

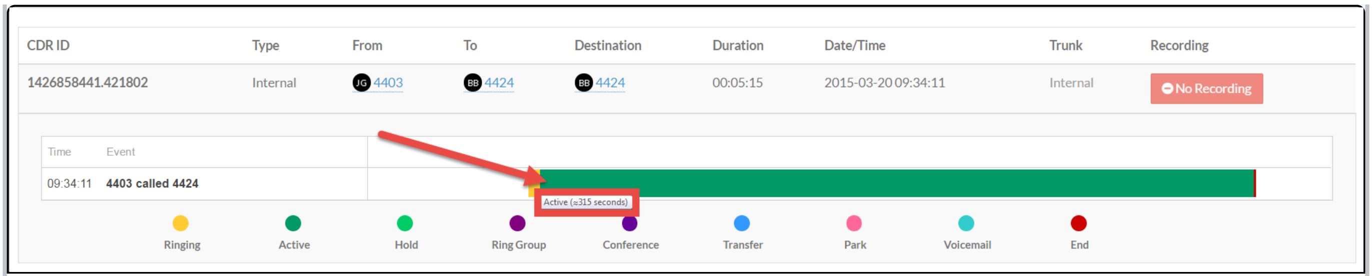


Figure 04: Approximate of Activity in Seconds

Ring Group Analytics

Last Modified on 05/25/2018 10:07 am EDT

Ring Group Analytics allows call center managers to view all information about the ring groups and queues they are managing. To run a report, first select the desired ring group (multiple ring groups may be selected). The list of ring groups is populated by any active **Ring Group** that is built into Kerauno.

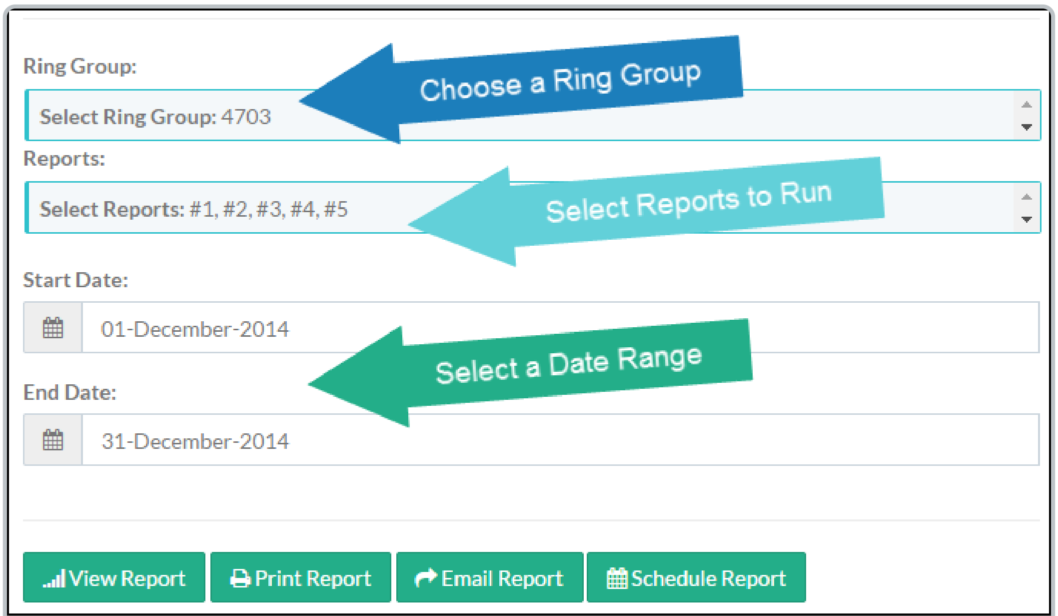


Figure 01: Ring Group Selection

Once a ring group(s) has been chosen, select the desired reports to run. The different types of reports available are explained in detail in the sub-sections below. Finally, enter a date range for the call data that you would like to use to generate the report.

When all required fields have been completed, select any of the green buttons at the bottom of the screen to display the report in the desired fashion (**View Report, Print, Email, or Schedule**).

Available Ring Group Reports

There are currently 7 available reports within the **Ring Group Analytics** menu. If attempting to run a set of specific reports, click the checkboxes in the far left column next to the desired reports and press **OK.**

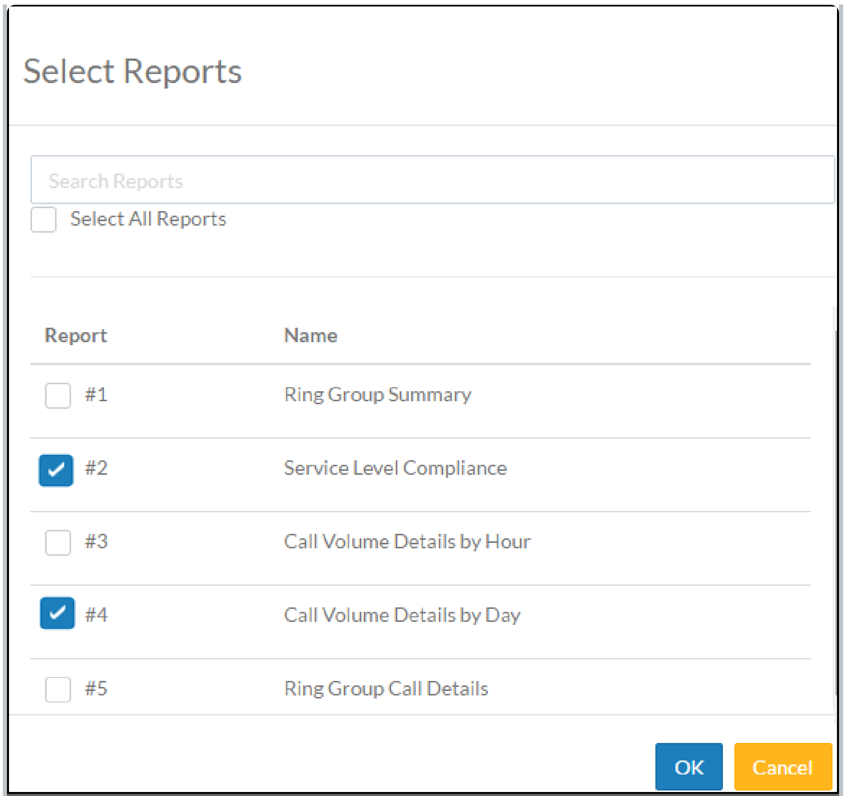
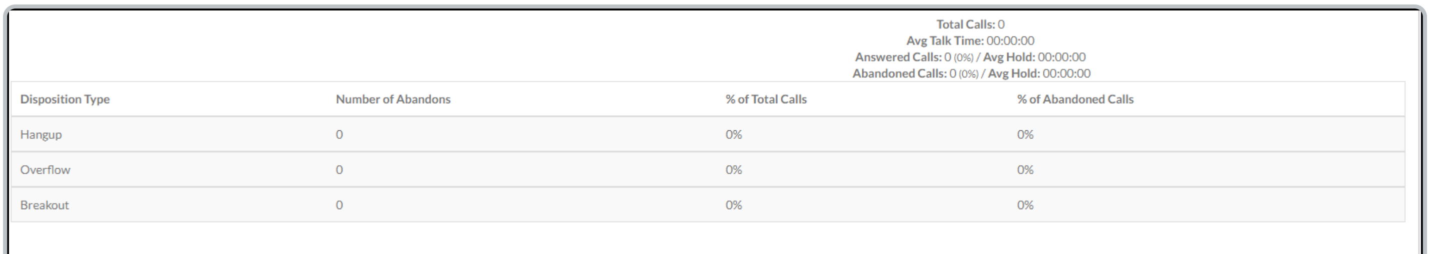


Figure 02: Selected Ring Groups

The **Select All Reports** option allows all available reports to be combined and generated into one bulk report about the ring group.



Total Calls: 0
Avg Talk Time: 00:00:00
Answered Calls: 0 (0%) / **Avg Hold:** 00:00:00
Abandoned Calls: 0 (0%) / **Avg Hold:** 00:00:00

Disposition Type	Number of Abandons	% of Total Calls	% of Abandoned Calls
Hangup	0	0%	0%
Overflow	0	0%	0%
Breakout	0	0%	0%

Figure 03: Ring Group Summary - Disposition Types

The **Ring Group Summary** report shows the most basic information about a ring group within the respective date range that is chosen. Information on this report includes Total Calls, Answered vs Abandoned Calls, and Average Hold Times. An **abandoned call** occurs when the caller enters the ring group and then hangs up while on hold, or if the maximum hold time for the ring group is reached.

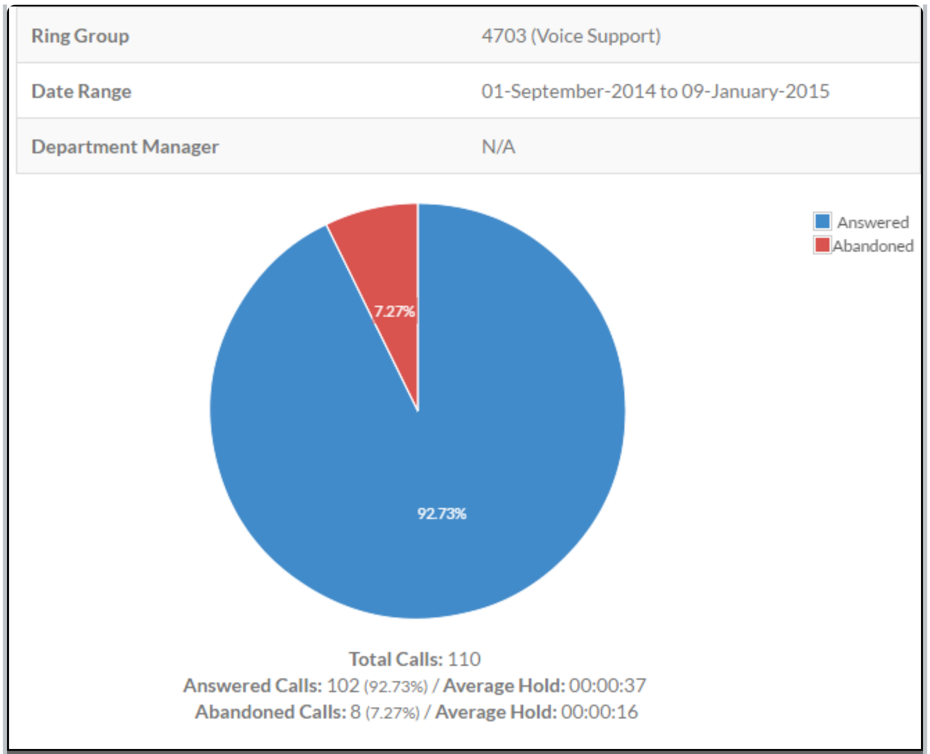


Figure 03: Ring Group Summary Report

Report 2: Service Level Compliance

The **Service Level Compliance (SLA)** report shows the percentage of calls that were picked up within the service level compliance interval set on a specific ring group. The SLA interval is the target answer time for a call, and can be set under the **Call Routing > Ring Groups** menu.

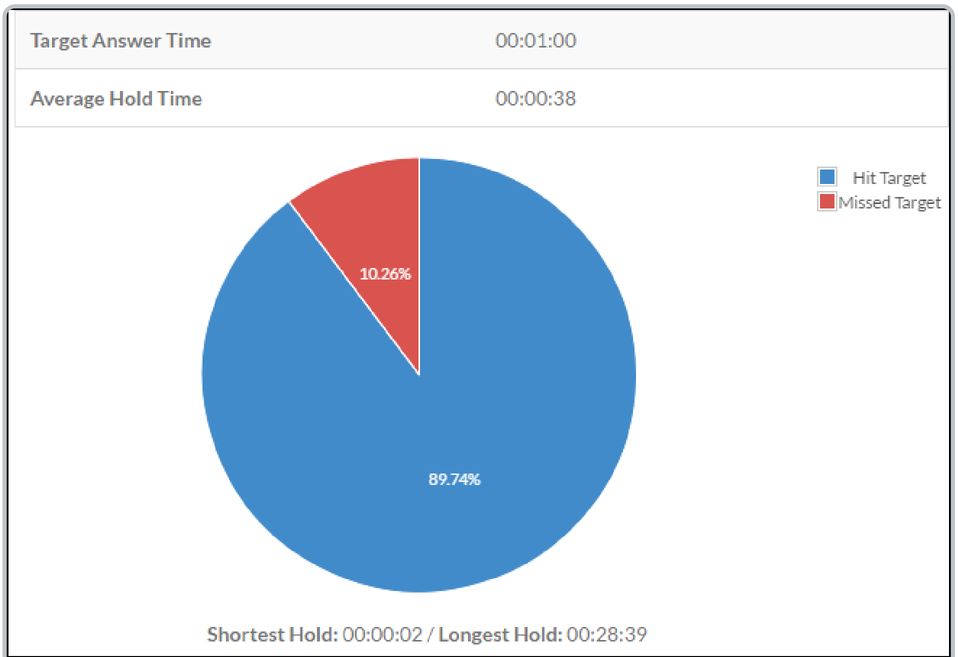


Figure 04: Service Level Compliance Report

Report 3: Call Volume Details by Hour

The **Call Volume Details by Hour** report shows the number of answered/abandoned calls during any one hour period of the day. Abandoned calls are shown in red, while answered calls are shown in blue. Hovering the mouse over any specific bar in the graph will show the number of calls for that hour.

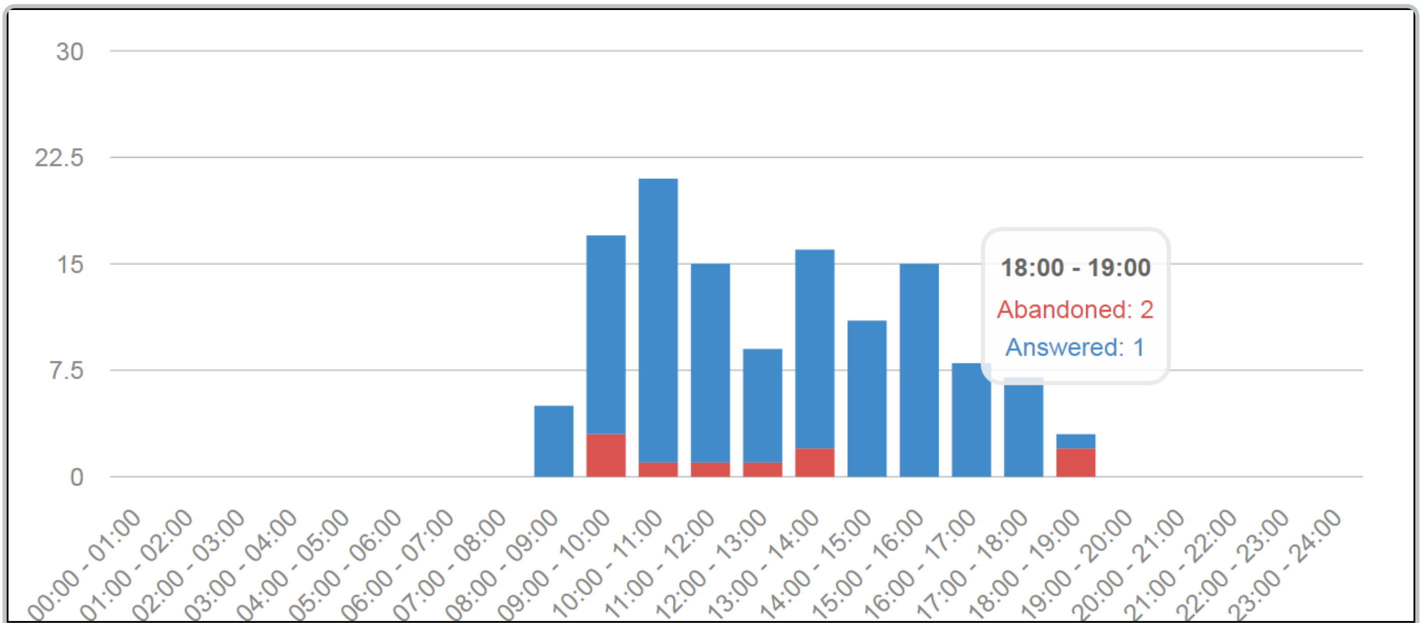


Figure 05: Call Volume Details by Hour

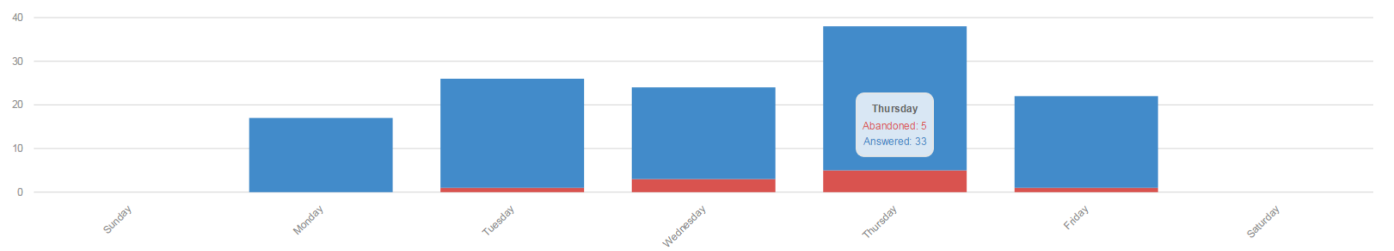
In the **Call Volume Details by Hour** report, an additional table detailing each hour is available. This report includes average hold time, SLA Compliance Percentage, and Agents Available.

Time	Total Calls	Answered	Abandoned	Average Hold	SLA Compliance	Agents Available
09:00 - 10:00	17	14	3	00:00:40	100.00%	3
10:00 - 11:00	21	20	1	00:00:11	95.00%	4
11:00 - 12:00	15	14	1	00:00:38	85.71%	4
12:00 - 13:00	9	8	1	00:01:54	75.00%	4
13:00 - 14:00	16	14	2	00:02:36	85.71%	4
14:00 - 15:00	11	11	0	00:00:21	81.82%	3
15:00 - 16:00	15	15	0	00:00:24	93.33%	3
16:00 - 17:00	8	8	0	00:00:09	100.00%	4
17:00 - 18:00	7	7	0	00:00:13	100.00%	2
18:00 - 19:00	3	1	2	00:00:13	100.00%	3

Figure 06: Call Volume Details by Hour Report Detail

Report 4: Call Volume Details by Day

The **Call Volume Details by Day** report shows the same data as the Call Volume Details by Hour but for calls during any given day of the week during the time frame selected. Hovering the mouse over any particular bar in the graph will show the number of calls that occurred during that day of the week.



Day	Total Calls	Answered	Abandoned	Average Hold	SLA Compliance	Agents Available
Sunday	-	-	-	-	-	-
Monday	17	17	0	00:00:39	82.35%	3
Tuesday	26	25	1	00:00:19	92.00%	4
Wednesday	24	21	3	00:00:41	85.71%	5
Thursday	38	33	5	00:01:35	90.91%	4
Friday	22	21	1	00:00:16	95.24%	4
Saturday	-	-	-	-	-	-

Figure 07: Call Volume Details by Day

Report 5: Call Volume Details By Agent

The **Call Volume Details by Agent** report displays information about any agent who took a call from the selected ring group. This report allows for comparison between agents. The table includes min/max/avg/ talk time as well as the agent's total answered calls as a percentage of all calls.

CALL VOLUME DETAILS BY AGENT

Export to CSV

Agent	Answered Calls	% of Calls	SLA Compliance	Min Talk Time	Max Talk Time	Avg Talk Time	Ttl Talk Time
4412	102	61.45%	84.31%	00:00:06	00:26:17	00:04:44	08:01:47
4461	6	3.61%	50.00%	00:00:30	00:02:40	00:01:23	00:08:15
4467	58	34.94%	98.28%	00:00:12	00:15:49	00:03:01	02:54:39
TTLS / AVGS:	**166**	**(100%)**	**77.53%**	**00:00:06**	**00:26:17**	**00:04:01**	**11:04:41**

Figure 08: Call Volume Details by Agent

Report 6: Call Volume Details by Agent By Hour

The **Call Volume Details by Agent By Hour** report displays which agents took calls during a specific one hour period during the day. Any agent who answered a ring group call during the date range chosen for the report is included in the table.

CALL VOLUME DETAILS BY AGENT BY HOUR

Export to CSV

Agent	00:00 01:00	01:00 02:00	02:00 03:00	03:00 04:00	04:00 05:00	05:00 06:00	06:00 07:00	07:00 08:00	08:00 09:00	09:00 10:00	10:00 11:00	11:00 12:00	12:00 13:00	13:00 14:00	14:00 15:00	15:00 16:00	16:00 17:00	17:00 18:00	18:00 19:00	19:00 20:00	20:00 21:00	21:00 22:00	22:00 23:00	23:00 24:00	Ttl
4412	-	-	-	-	-	-	-	1	13	17	10	7	14	7	9	13	9	2	-	-	-	-	-	-	102
4461	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	6	-	-	-	-	-	-	6
4467	-	-	-	-	-	-	-	1	5	2	8	9	7	5	2	7	6	2	4	-	-	-	-	-	58
TTLS / AVGS:	-	-	-	-	-	-	-	2	18	19	18	16	21	12	11	20	15	10	4	-	-	-	-	-	166

Figure 09: Call Volume Details by Agent By Hour

Report 7: Ring Group Call Details

The **Ring Group Call Details** report shows all available CDRs for a specific ring group taken during the report's specified time period. The report includes typical CDR data including date/time of call, duration, and Caller ID info. Answered calls will show in blue, while abandoned calls will show in red. Clicking a **Date/Time** in the first column will bring up the in-call analytics menu, just as it would on any other page in the reporting module.

Date/Time	Type	From	To	Destination	Duration	Trunk
(1) 2015-04-03 14:26:15	Ring Group	+13177487666	+18004112942	4701	00:01:38	IPLVINEASBC01
(2) 2015-04-03 14:21:45	Ring Group	+13175706331	+18664595360	4438	00:01:10	IPLVINEASBC01
(3) 2015-04-03 14:19:14	Ring Group	+13175706331	+13174895544	4438	00:01:40	IPLVINEASBC01
(4) 2015-04-03 12:45:11	Ring Group	+13174895544	+18664595360	4423	00:02:17	IPLVINEASBC01

Figure 10: Ring Group Call Details Report

Agent Analytics

Last Modified on 09/28/2018 9:08 am EDT

The **Agent Analytics Reports** allows call center managers to view all information about a specific agent across all ring groups that the agent is a part of. To run the report, select the appropriate agent then, select the desired report and input a **Start/End Date** into the respective fields.

NOTE:	**Agent Analytics Reports** only pull data from inbound "Ring Group" calls, not internal or direct extension calls.

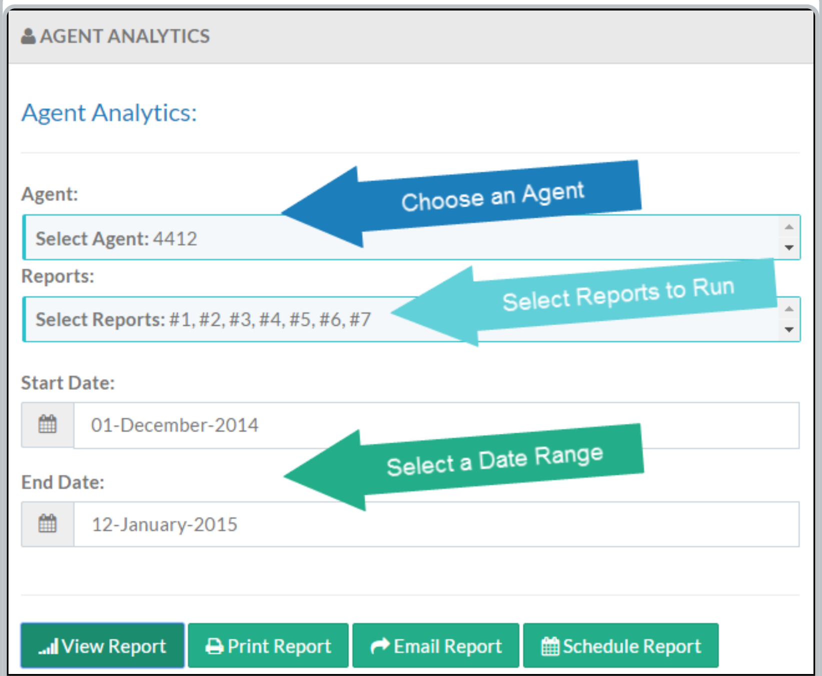


Figure 01 Agent Analytics Screen

After completing the required fields for the report, select any of the green buttons at the bottom of the screen to display the report in the desired fashion (**View in Browser, Print, Email, or Schedule**).

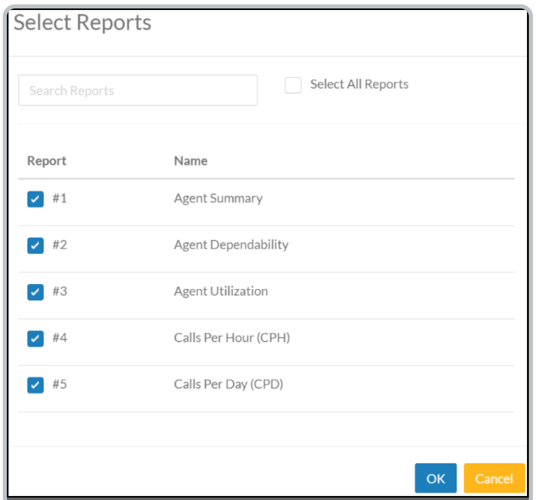


Figure 02: Agent Analytics Select Reports Screen

There are currently 7 reports within the **Agent Analytics** menu that may be selected. If running a set of multiple reports, click the checkboxes in the far left column next to the desired reports and press **OK** as shown in the Figure 02 to the right.

The **Select All Reports** option allows all available reports to be combined and generated into one bulk **Agent Analytics Report**.

Report 1: Agent Summary Report

The **Agent Summary Report** shows the most basic information about an agent within the respective date range chosen for the report. Information on this report includes total calls as well as a comparison of answered vs. unanswered calls.

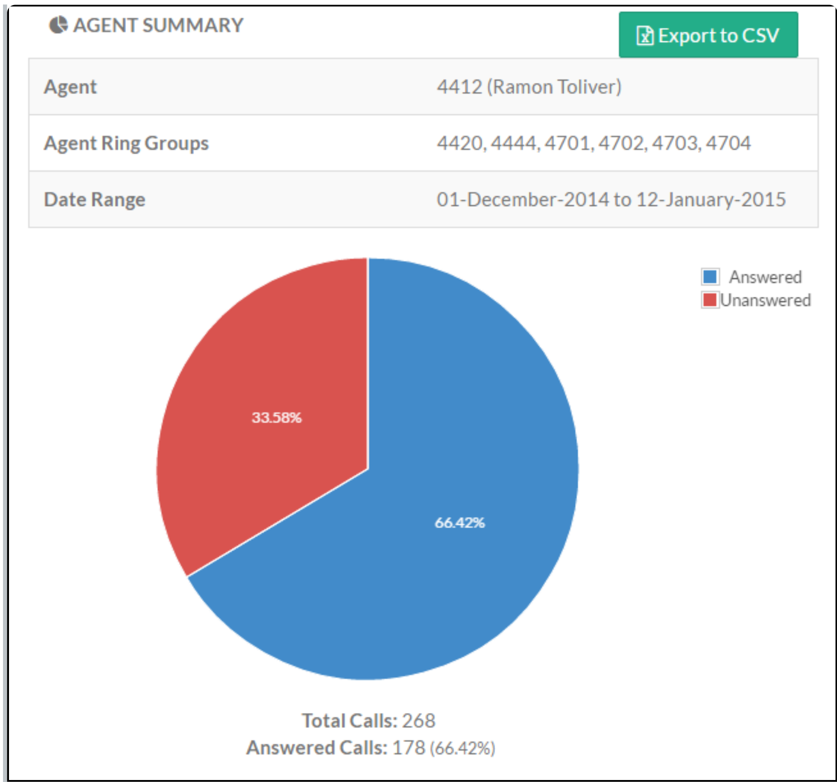


Figure 03: Agent Summary Report

Report 2: Agent Dependability Report

The **Agent Dependability Report** shows the total amount of time an agent was logged into a ring group for a specific day. The report will also include a graph of "time available" information for the range specified for the report. Hovering the mouse over a particular date will show the total time available for that particular day.

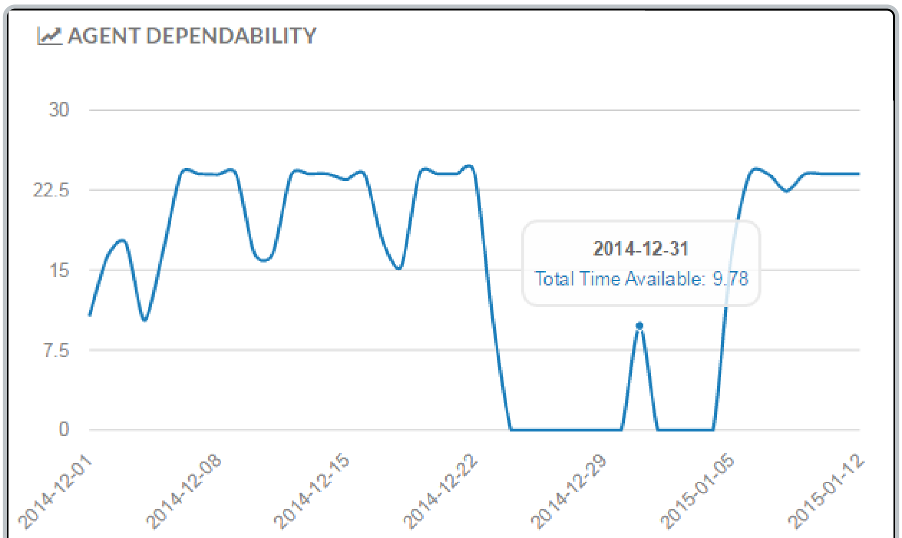


Figure 04: Agent Dependability Report Graph

Below the Agent Dependability Report Graph, a table is displayed for the specified agent showing each day the agent was logged in during the specified timeframe, the total number of calls, total number of calls answered, and total time available.

Date	Total Calls	Calls Answered	Total Time Available
+2014-12-01	4	3	10:39:47

Time	Event
07:35:56	Logged In
18:15:43	Logged Out

Date	Total Calls	Calls Answered	Total Time Available
+2014-12-02	16	9	16:18:09
+2014-12-03	7	7	17:30:56

Figure 05: Agent Dependability Report Graph

Clicking the or selecting a listed blue underlined date will expand the table and show the exact log in, log out, and pause times for a selected day.

Report 3: Agent Utilization

The **Agent Utilization** percentage equals the agent's **Total Talk Time** divided by **Time Available**. (i.e. how long the agent was on the phone while logged into the ring group.) The **Agent Utilization Report** shows a graph of agent utilization percentage over time. Hovering over a particular day will display **Utilization %** (utilization percentage) for that day.

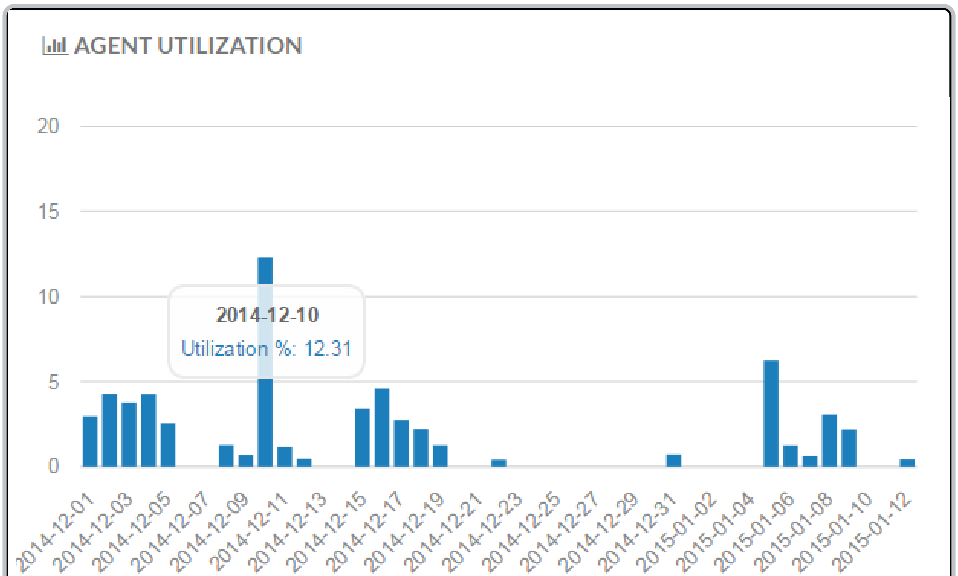


Figure 06: Agent Utilization Report Graph

Below the **Agent Utilization Report Graph** is a detailed table listing call statistics details each day of the selected date range. The listed statistics include min, max, and average hold times as well as min, max, and average talk times for a specific day.

Date	Time Available	Ttl Calls	Calls Answered	Min Hold Time	Max Hold Time	Avg Hold Time	Min Talk Time	Max Talk Time	Avg Talk Time	Ttl Talk Time
2014-12-01	10:39:47	4	3	00:00:03	00:00:07	00:00:05	00:03:24	00:09:49	00:06:21	00:19:02
2014-12-02	16:18:09	16	9	00:00:11	00:01:20	00:00:25	00:00:10	00:18:19	00:04:40	00:41:54
2014-12-03	17:30:56	7	7	00:00:04	00:00:45	00:00:13	00:00:02	00:16:25	00:05:40	00:39:34
2014-12-04	10:17:19	8	7	00:00:04	00:01:41	00:00:24	00:00:49	00:09:56	00:03:46	00:26:21
2014-12-05	16:35:22	12	12	00:00:03	00:02:24	00:00:30	00:00:58	00:04:47	00:02:07	00:25:20

Figure 07: Agent Utilization Report Table

Report 4: Call Volume Details by Day

The **Calls Per Hour Report** displays the number of calls per hour over a selected time period. The top of the report displays a bar chart with the number of total calls during each one hour interval. Hovering the mouse over a bar in the chart will display the total number of answered calls during that interval.

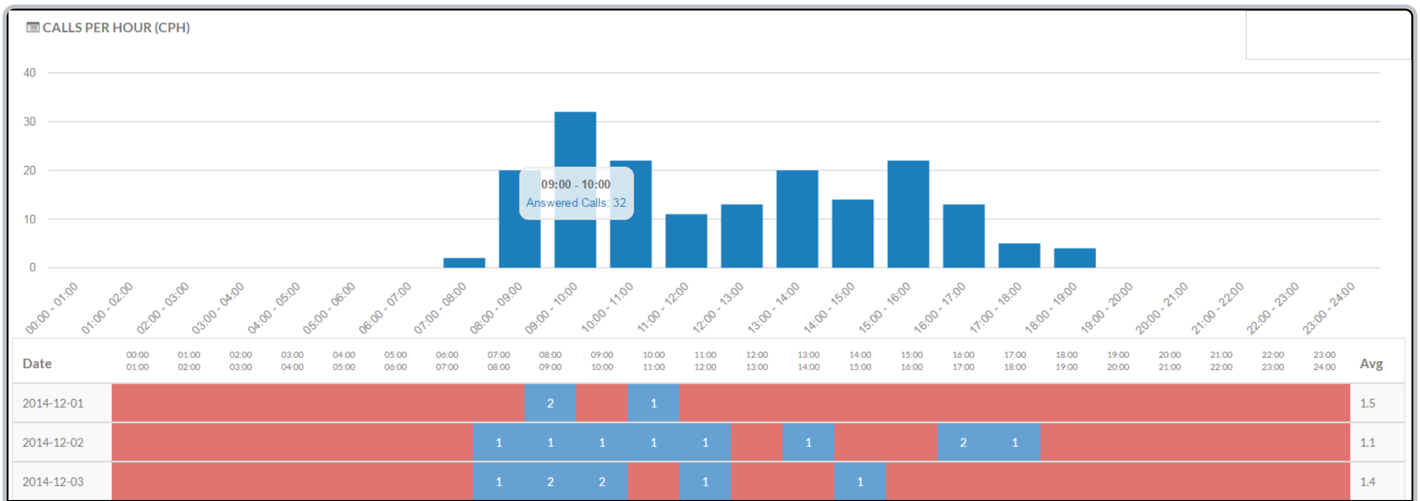


Figure 08: Calls Per Hour Report

Below the bar chart is a diagram showing the number of calls that were taken on a specific hour of a specific day. If this graph is red, it means no calls were taken by the agent during the one hour interval.

If a segment is blue, it means that calls were taken and the number of calls answered during the hour is displayed. An average number of calls per hour for the day is displayed on the right. This average does not take into account days on which there were no calls placed to the agent.

Report 5: Calls Per Day Report

The **Calls Per Day Report** displays the number of calls by day of the week over the selected time period. The top of the report displays a bar chart with the number of total calls that occurred during a particular day of the week. Hovering the mouse over a bar in the chart will display the total number of answered calls during that one day interval.

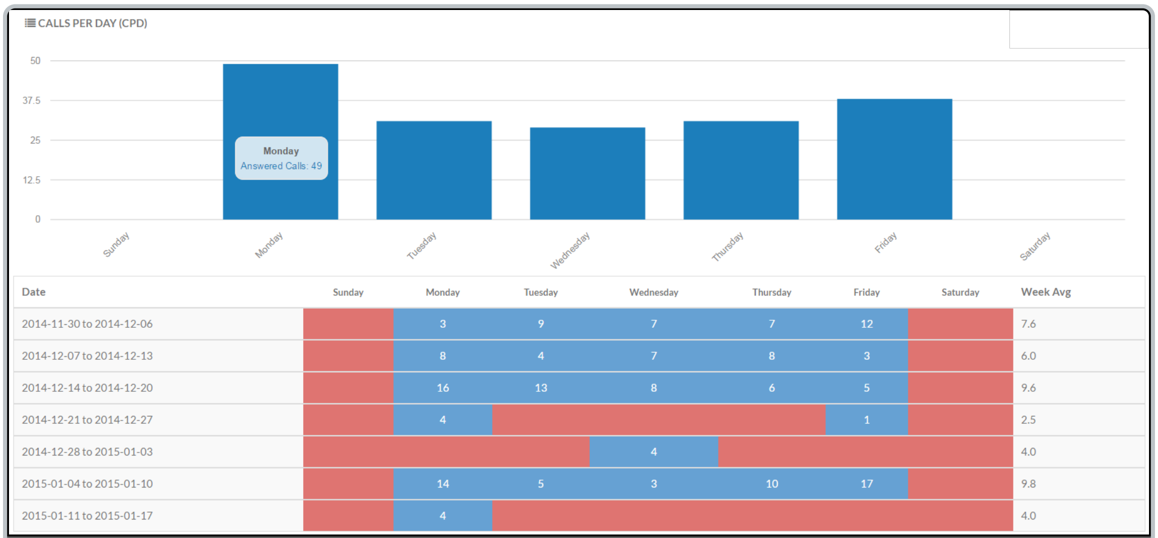
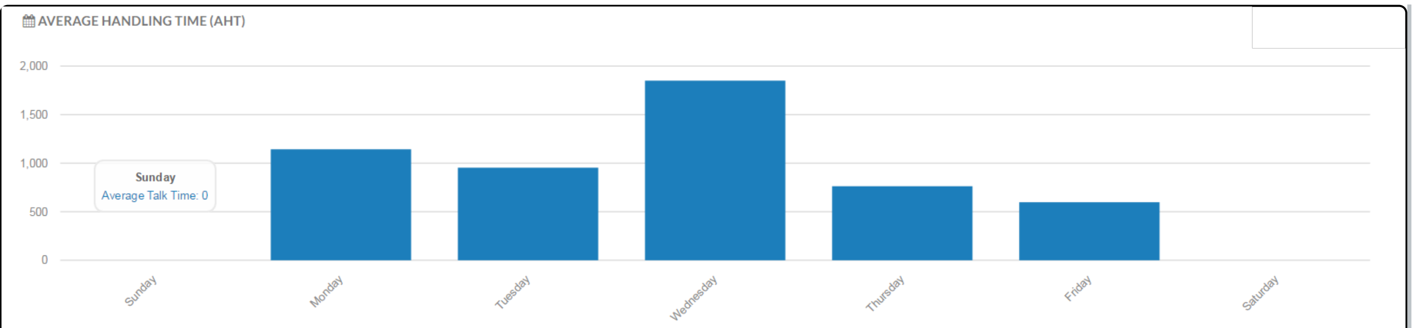


Figure 09: Calls Per Day Report

Below the bar chart is a diagram displaying the number of calls that were taken on a particular day for any given week. If a segment of this graph is red, it means no calls were taken by the agent that day. If a segment is blue, it means that calls were taken and the total number of calls that were answered during the day is displayed. An average number of calls taken for the week is displayed on the far right. This average does not take into account days on which there were no calls placed to the agent.

Report 6: Average Handling Time Report

The **Average Handling Time Report** displays the average handling time for calls coming to an agent by weekday. The top of the report will display a graph with the average handling time for any given day of the week.



Date	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Week Avg
2014-11-30 to 2014-12-06		00:06:21	00:04:40	00:05:40	00:03:46	00:02:07		00:04:31
2014-12-07 to 2014-12-13		00:02:19	00:02:32	00:17:29	00:01:27	00:02:13		00:05:12
2014-12-14 to 2014-12-20		00:03:01	00:05:06	00:03:39	00:03:23	00:03:39		00:03:46
2014-12-21 to 2014-12-27		00:01:29				00:00:09		00:00:49
2014-12-28 to 2015-01-03				00:01:04				00:01:04
2015-01-04 to 2015-01-10		00:04:22	00:03:37	00:03:00	00:04:08	00:01:51		00:03:24
2015-01-11 to 2015-01-17		00:01:33						00:01:33

Figure 10: Average Handling Time Report

Below the bar chart, a diagram showing the average handling time of all calls that were taken on any given day is displayed. If a segment of this graph is red, it means no calls were taken by the agent that day.

If a segment is blue, it means that calls were taken and the average handling time for that day is displayed on the far right. This average is not taken into account for days on which there were no calls placed to the agent.

Report 7: Agent Call Details

The **Agent Call Details Report** displays all available CDRs for a specific agent taken during the specified time period. The report includes typical CDR data including date/time of call, duration, and Caller ID information.

Date/Time	Type	From	To	Destination	Duration	Trunk
(1) 2015-04-02 15:27:32	Ring Group	+13178241735	+18004112942	4702	00:05:47	IPLVINEASBC01
(2) 2015-04-02 15:10:38	Ring Group	+15132041916	+18664595360	4701	00:04:19	IPLVINEASBC01
(3) 2015-04-01 15:59:12	Ring Group	+18125904514	+18004112942	4702	00:03:39	IPLVINEASBC01
(4) 2015-04-01 15:05:45	Ring Group	+13174284589	+18004112942	4702	00:15:13	IPLVINEASBC01

Figure 11: Agent Calls Details Report

Only ring group calls that were answered by the agent is displayed. Clicking a Date/Time in the first column displays the In-Call Analytics menu, just as it would on any other page in the reporting module.

Trunk Analytics

Last Modified on 05/25/2018 10:07 am EDT

The **Trunk Analytics Reports** give administrators the ability to view all inbound and outbound call information that comes over a specific trunk as well as statistics about that trunk. This analytics report is particularly useful if viewing call data at a high level across multiple ring groups and agents.

To run this report, select the desired trunk then select the desired reports and enter a **Start/End Date** into the respective fields.

NOTE:	Multiple trunks may be selected at one time.

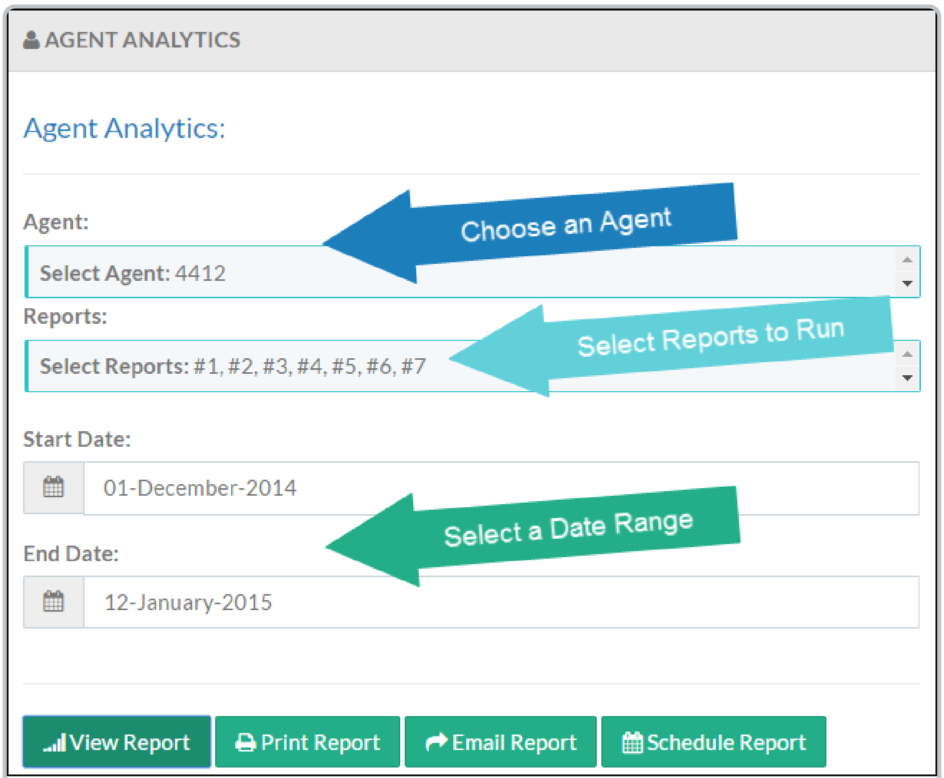


Figure 1: Agent Analytics Reporting

After completing the required fields to run the report, select any of the green buttons at the bottom of the screen to display the report in the desired fashion (**View in Browser, Print, Email,** or **Schedule**).

There are currently 5 reports within the Trunk Analytics menu that may be selected. If running a set of multiple reports, click the checkboxes in the far left column next to the desired report and press OK.

The **Select All Reports** option allows all available reports to be combined and generated into one bulk report.

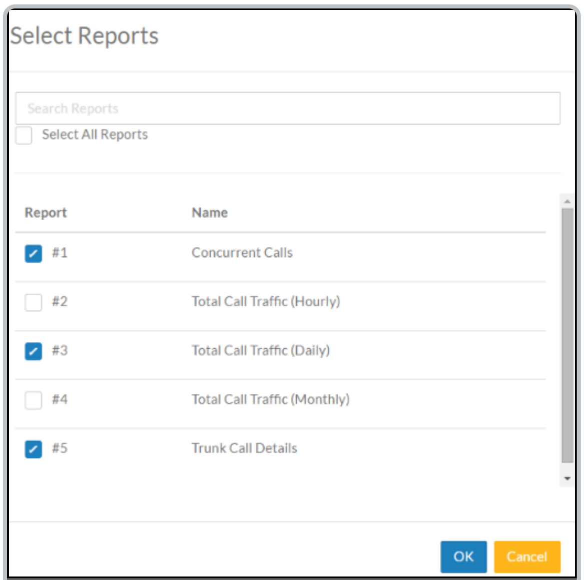
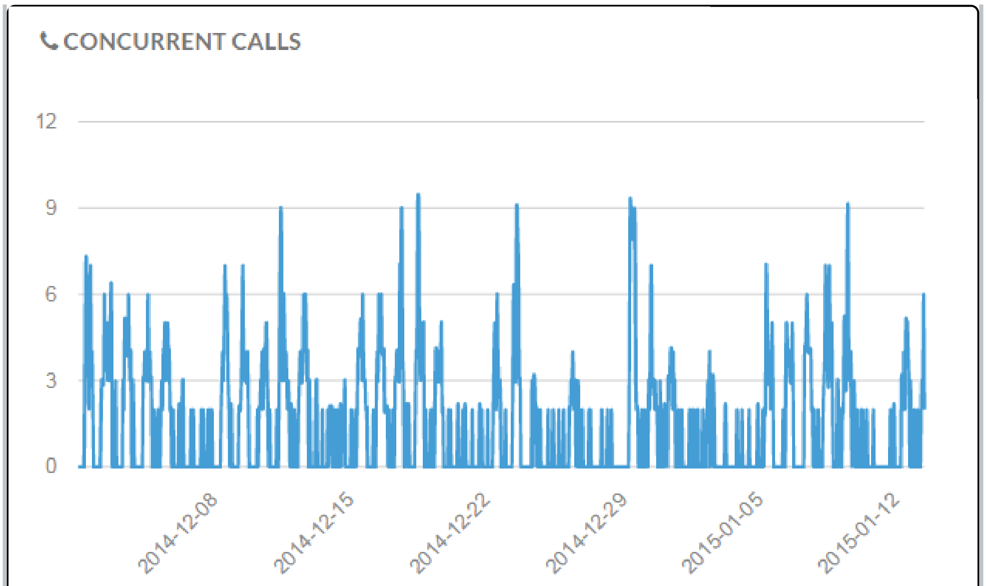


Figure 02: Trunk Analytics Reporting Select Reports

Report 1 Concurrent Calls

The **Concurrent Calls Report** displays the maximum amount of calls that occurred simultaneously on a specific day. Extension to extension calls *do not* count as a concurrent call, as they do not utilize any trunk. Calls that are on hold or waiting to be answered in a ring group, will count as a concurrent call, as they are utilizing a trunk.

The **Concurrent Calls Report** displays a graph at the top of the page which shows trends in the amount of concurrent calls per day over the specified time period. This graph shows the maximum amount of simultaneous active calls that occurred during a particular day.



	Date/Time	Count
Inbound/Outbound Peak Concurrent Calls	2014-12-18 11:41:41	9
Inbound/Outbound Min Concurrent Calls	2014-12-01 08:29:40	1
Inbound Peak Concurrent Calls	2014-12-17 15:00:14	6
Inbound Min Concurrent Calls	2014-12-01 08:29:40	1
Outbound Peak Concurrent Calls	2014-12-23 13:05:59	7
Outbound Min Concurrent Calls	2014-12-01 08:29:53	1

Figure 03: Concurrent Calls Report

The table at the bottom of the report shows the maximum and minimum concurrent calls (inbound and outbound) for the period specified.

Report 2 Total Call Traffic (Hourly)

The **Total Call Traffic (Hourly) Report** shows a bar chart with the number of total inbound and outbound calls during any one-hour period of the day during the selected time frame. Outbound calls are displayed in a dark blue color while inbound calls are light blue. Hovering the mouse over any particular bar in the graph will show the number of both inbound and outbound calls for that hour.

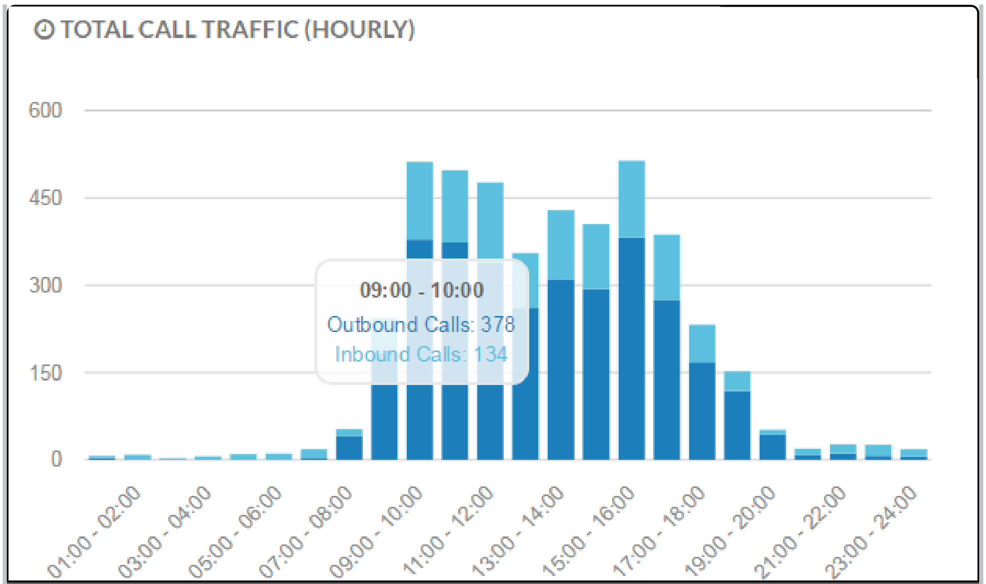


Figure 04: Total Call Traffic (Hourly) Report

Below the bar chart is a table of additional information broken down by hour. This table lists the total calls, inbound calls, outbound calls, and what percentage of total calls were taken during the specified one-hour period.

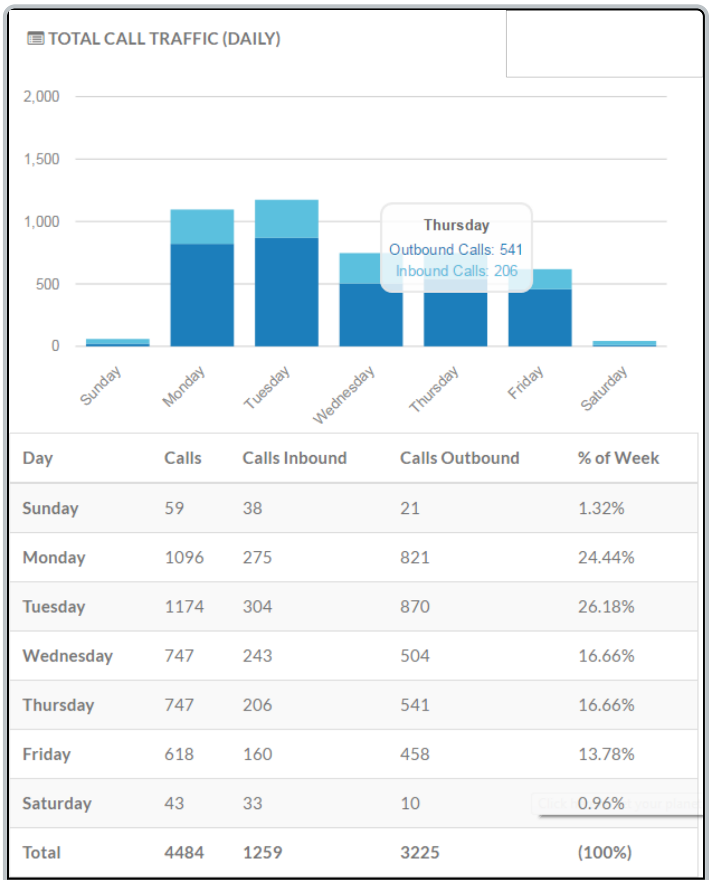
Hour	Calls	Calls Inbound	Calls Outbound	% of Day
08:00 - 09:00	243	59	184	5.42%
09:00 - 10:00	512	134	378	11.42%
10:00 - 11:00	497	124	373	11.09%
11:00 - 12:00	476	138	338	10.62%

Figure 05: Total Call Traffic (Hourly) Report Table

Report 3 Total Call Traffic (Daily) Report

The **Total Call Traffic (Daily) Report** displays the number of calls by day of the week over the selected time period. The top of the report displays a bar chart with the number of total calls that occurred during a given day of the week. Hovering the mouse over a bar in the chart will display the amount of inbound and outbound calls for that day.

Below the bar chart, a table is displayed showing the number of total, inbound, and outbound calls. On the far right, the percentage of calls for a particular day as a percentage of total calls is listed.



Day	Calls	Calls Inbound	Calls Outbound	% of Week
Sunday	59	38	21	1.32%
Monday	1096	275	821	24.44%
Tuesday	1174	304	870	26.18%
Wednesday	747	243	504	16.66%
Thursday	747	206	541	16.66%
Friday	618	160	458	13.78%
Saturday	43	33	10	0.96%
Total	4484	1259	3225	(100%)

Figure 06: Total Call Traffic Report (Daily)

Report 4 Total Call Traffic (Monthly)

The **Total Call Traffic (Monthly) Report** displays the number of calls by month over the selected time period. The top of the report displays a bar chart with the number of calls (total, inbound, and outbound) that occurred during a specified month. Hovering the mouse over a bar in the chart will display the exact amount of inbound and outbound calls.

Below the bar chart, a table is displayed showing the number of calls (total, inbound, and outbound) with the percentage of calls for the specified month as a percentage of total calls for the year displayed on the far right.

Month	Calls	Calls Inbound	Calls Outbound	% of Year
January	1126	291	835	7.43%
February	-	-	-	-
March	-	-	-	-
April	-	-	-	-
May	-	-	-	-
June	-	-	-	-
July	-	-	-	-
August	679	248	431	4.48%
September	3506	1000	2506	23.14%
October	3297	789	2508	21.77%
November	3161	859	2302	20.87%
December	3379	975	2404	22.31%
Total	15148	4162	10986	(100%)

Figure 07: Total Call Traffic (Monthly) Report

Report 5 Trunk Call Details

The **Trunk Call Details Report** displays all available CDRs for the identified trunk during the time period specified for the report.

TRUNK CALL DETAILS

CDR ID	Type	From	To	Destination	Duration	Date/Time	Trunk
(1) 1421176151.156065	Incoming	+13172015529	+13176534417	4417	00:00:00	2015-01-13 14:09:11	IPLVINEASBC01
(2) 1421175986.156055	Outgoing	4410	18888001040	18888001040	00:00:04	2015-01-13 14:06:26	IPLVINEASBC01
(3) 1421175747.156039	Incoming	+13177382468	+13174895544	4404	00:02:15	2015-01-13 14:02:27	IPLVINEASBC01
(4) 1421174934.156003	Outgoing	4404	3173643700	3173643700	00:00:51	2015-01-13 13:48:54	IPLVINEASBC01
(5) 1421174905.156001	Outgoing	4404	3173643770	3173643770	00:00:00	2015-01-13 13:48:25	IPLVINEASBC01
(6) 1421174760.155991	Outgoing	4404	3173643770	3173643770	00:00:35	2015-01-13 13:46:00	IPLVINEASBC01
(7) 1421174700.155987	Outgoing	4410	3176948142	3176948142	00:00:00	2015-01-13 13:45:00	IPLVINEASBC01
(8) 1421174217.155958	Outgoing	+13172949916	3173410855	3173410855	00:00:00	2015-01-13 13:36:57	IPLVINEASBC01
(9) 1421174214.155951	Incoming	+13172949916	+13176534436	4436	00:02:07	2015-01-13 13:36:54	IPLVINEASBC01

Figure 08: Trunk Call Details Report

The report includes typical CDR data including date/time of call, duration, and Caller ID information. Clicking a Date/Time in the first column will display the in-call analytics menu, just as it would on any other page in the reporting module. CDR records in light blue are inbound calls; CDR records in dark blue are outbound calls.

Downline Report

Last Modified on 10/03/2018 2:47 pm EDT

Downline reporting provides call center managers with statistics on outbound call information for agents logged into a ring group. This analytics report is designed for use with sales teams or other employee groups making a large number of outbound calls. To run this report, select the appropriate ring group then select the reports to run and enter a date range for the call data.

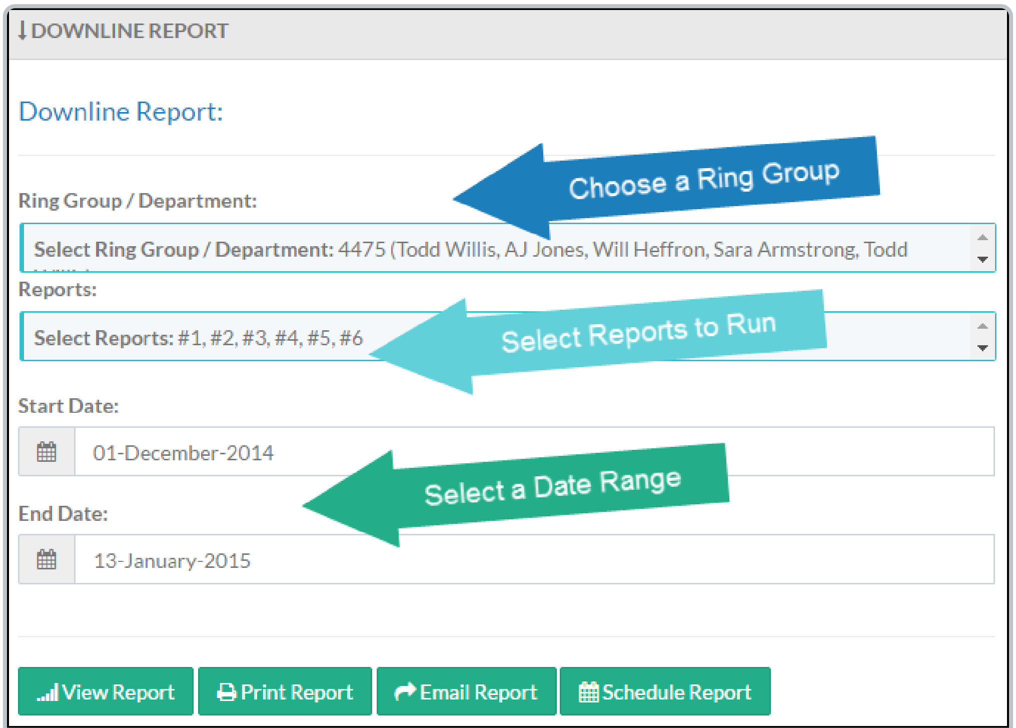


Figure 01: Downline Reporting Screen

After completing the required information to run the report, select any of the green buttons at the bottom of the screen to display the report in the desired fashion (**View in Browser, Print, Email,** or **Schedule**). There are currently 6 reports within the Downline analytics menu. To run a set of specific reports, click the checkboxes in the far left column next to the desired reports and press the **OK** button.

The **Select All Reports** option allows every type of available Downline Analytics report to be combined into one bulk report. Information about each report and examples of all available reports can be found in the following sections.

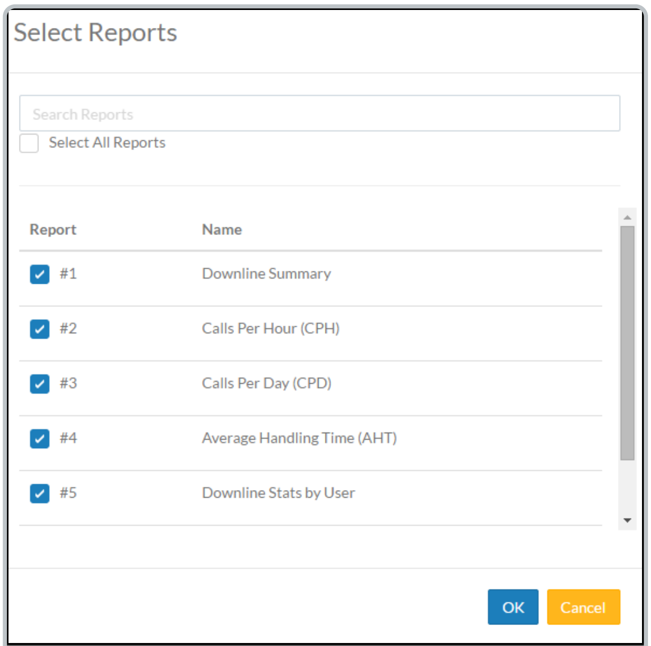


Figure 02: Downline Reporting Select Reports

Report 1 Downline Summary

The **Downline Summary Report** displays the total number of outbound calls, the amount of answered vs unanswered outbound calls and the minimum, maximum, and average talk time for all outbound calls from the ring group.

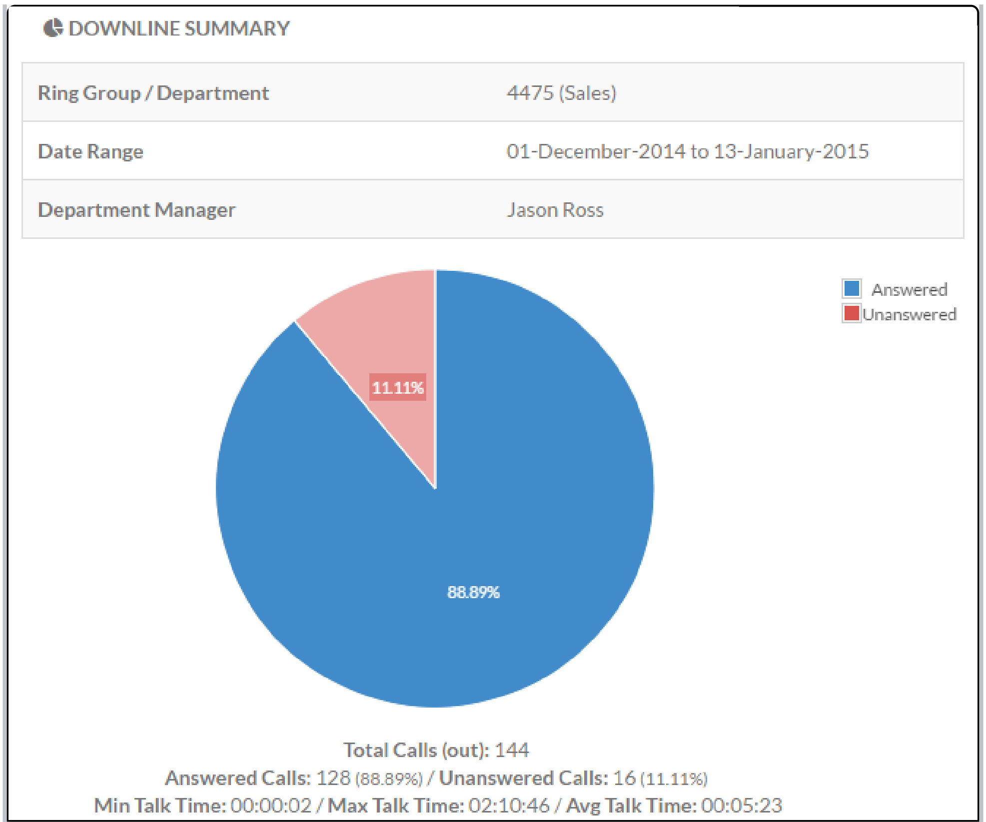
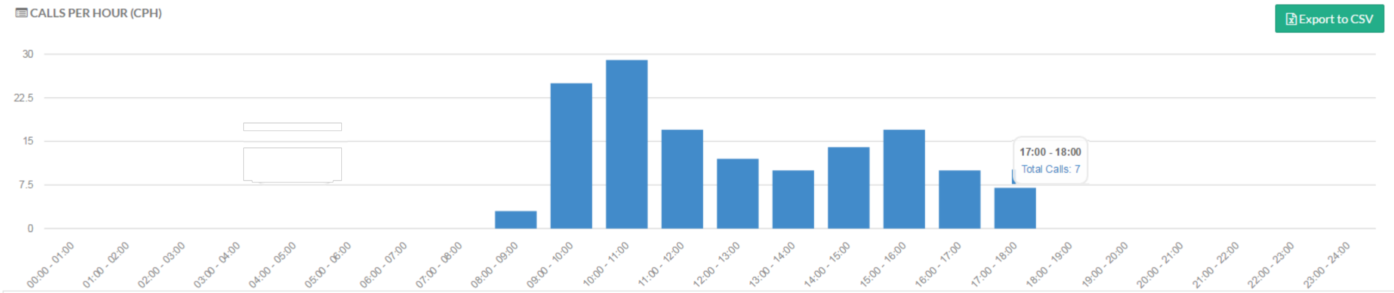


Figure 03: Downline Summary Report

Report 2 Calls per Hour (CPH)

The **Calls per Hour (CPH) Report** displays the total number of outbound calls placed by the ring group during a one-hour period of the day during the selected time frame. Hovering the mouse over any particular bar in the graph will display the number of outbound calls for that hour. Below this bar chart is a table that displays total calls, answered vs. unanswered, and talk time information.

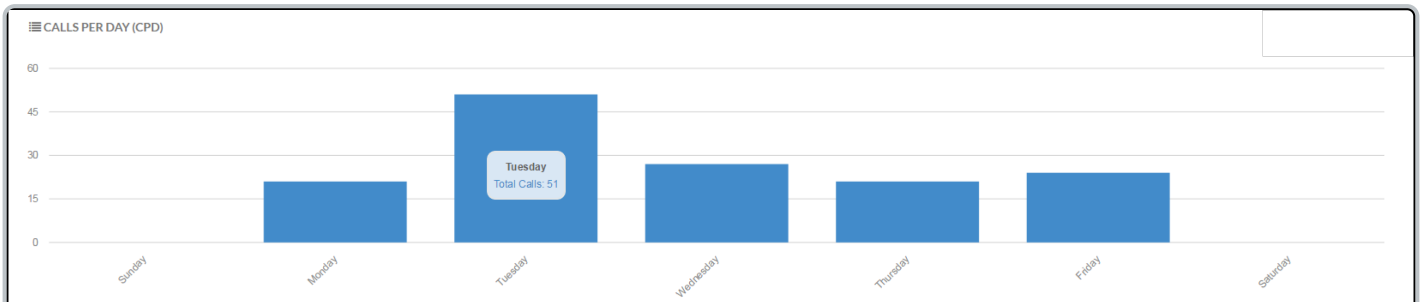


Time	Total Calls (out)	Answered	% Answered	Min Talk Time	Max Talk Time	Avg Talk Time
08:00 - 09:00	3	3	100.00%	00:00:51	00:05:16	00:02:24
09:00 - 10:00	25	22	88.00%	00:00:03	00:52:50	00:06:30
10:00 - 11:00	29	25	86.21%	00:00:02	00:26:31	00:04:08
11:00 - 12:00	17	17	100.00%	00:00:04	00:11:08	00:03:58
13:00 - 14:00	10	7	70.00%	00:01:11	02:10:46	00:27:49
14:00 - 15:00	14	12	85.71%	00:00:02	00:12:13	00:05:01
15:00 - 16:00	17	16	94.12%	00:00:05	00:07:41	00:02:01
16:00 - 17:00	10	8	80.00%	00:00:13	00:12:41	00:04:20
17:00 - 18:00	7	7	100.00%	00:00:02	00:08:58	00:02:32

Figure 04: Calls per Hour (CPH) Report

Report 3 Calls per Day (CPD)

The **Calls per Day Report** displays the number of outbound calls by day of the week over the selected time period. The top of the report displays a bar chart of the number of total calls that occurred during a given day of the week. Below the bar chart, a table is displayed showing the number of total outbound calls with answered vs. unanswered percentage, minimum, maximum, and average talk time.



Time	Total Calls (out)	Answered	% Answered	Min Talk Time	Max Talk Time	Avg Talk Time
Sunday	-	-	-	-	-	-
Monday	21	20	95.24%	00:00:03	00:22:32	00:04:10
Tuesday	51	43	84.31%	00:00:02	02:10:46	00:08:02
Wednesday	27	24	88.89%	00:00:02	00:10:41	00:03:11
Thursday	21	19	90.48%	00:00:03	00:34:40	00:05:00
Friday	24	22	91.67%	00:00:02	00:24:40	00:04:05
Saturday	-	-	-	-	-	-

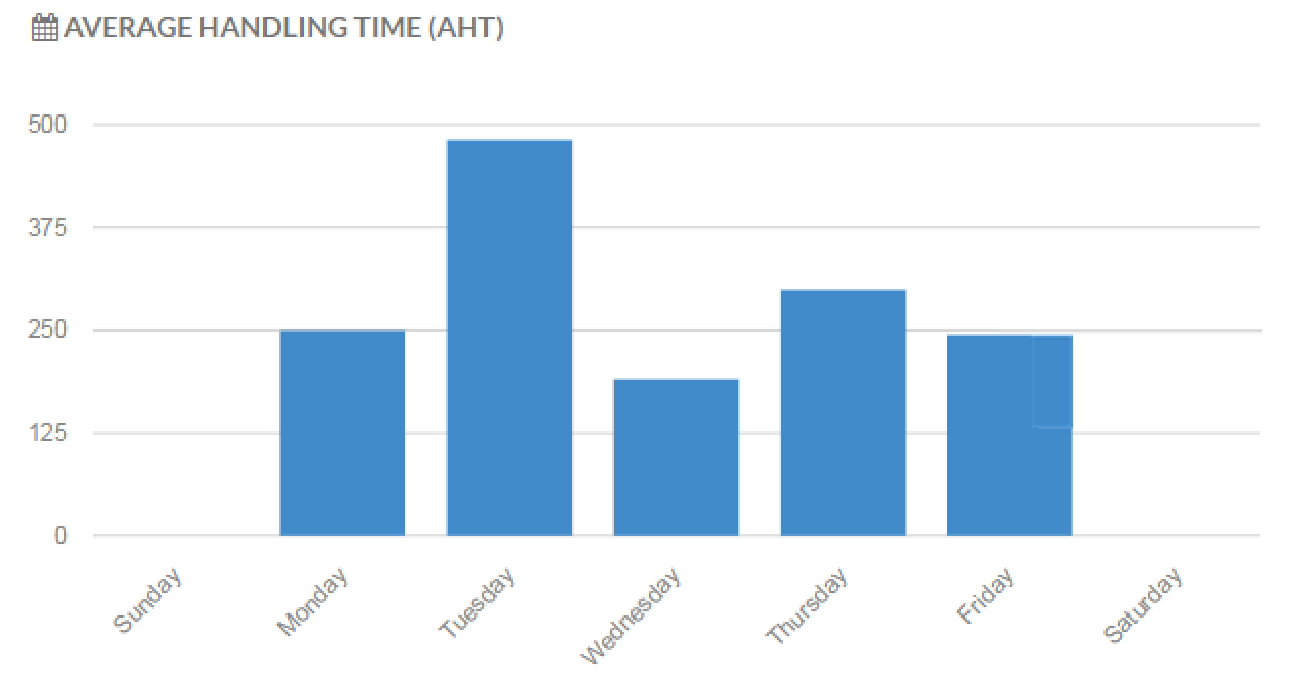
Figure 05: Calls Per Day (CPD) Report

Report 4 Average Handling Time (AHT)

Report

The **Average Handling Time Report** displays the average handling time for total outbound calls by day of week. The top of the report displays a bar chart illustrating the average handling time in seconds for a given day of the week.

Below the bar chart is a table shown displaying the average handling time of all outbound calls from the ring group including the average, minimum, and maximum talk time across all agents. The report lists basic information such as the total number of calls by day of week as well as the answered vs. unanswered statistics for those calls.



Time	Total Calls (out)	Answered	% Answered	Min Talk Time	Max Talk Time	Avg Talk Time
Sunday	-	-	-	-	-	-
Monday	21	20	95.24%	00:00:03	00:22:32	00:04:10
Tuesday	51	43	84.31%	00:00:02	02:10:46	00:08:02
Wednesday	27	24	88.89%	00:00:02	00:10:41	00:03:11
Thursday	21	19	90.48%	00:00:03	00:34:40	00:05:00
Friday	24	22	91.67%	00:00:02	00:24:40	00:04:05
Saturday	-	-	-	-	-	-

Figure 06: Average Handling Time (AHT) Report

Report 5 Downline Stats by User

The **Downline Stats by User Report** provides a breakdown of outbound calls from the ring group by agent. Any agent who has made an outbound call during the specified time period, is displayed in this report. The total number of outbound calls per user, answering percentages, and talk time statistics for each individual user are also displayed in this report.

DOWNLINE STATS BY USER

User	Total Calls (out)	Answered	% Answered	Min Talk Time	Max Talk Time	Avg Talk Time
AJ Jones	30	28	93.33%	00:00:02	00:19:10	00:03:21
Sara Armstrong	101	89	88.12%	00:00:02	00:52:50	00:04:20
Todd Willis	-	-	-	-	-	-
Will Heffron	13	11	84.62%	00:00:03	02:10:46	00:19:09

Figure 07: Downline Stats by User Report

Scheduled Reports

Last Modified on 05/25/2018 10:06 am EDT

Any report that has been set up via the **Schedule Report** button by any user on the system will display under the **Schedule Reports** menu. These reports will run at the interval specified (Daily, Weekly, Monthly, Quarterly) in the **Report Type** column. All reports will run at 12:00AM by default.

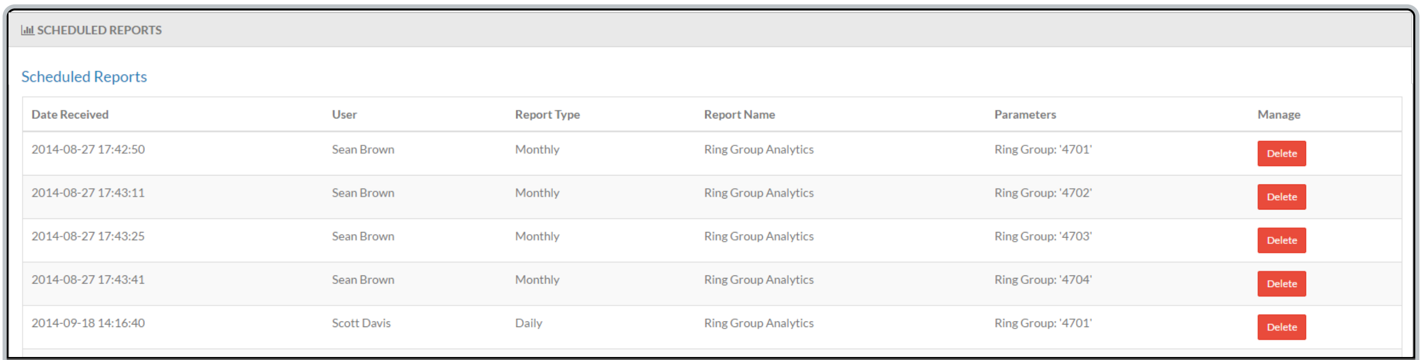


Figure 01: Scheduled Reports Menu

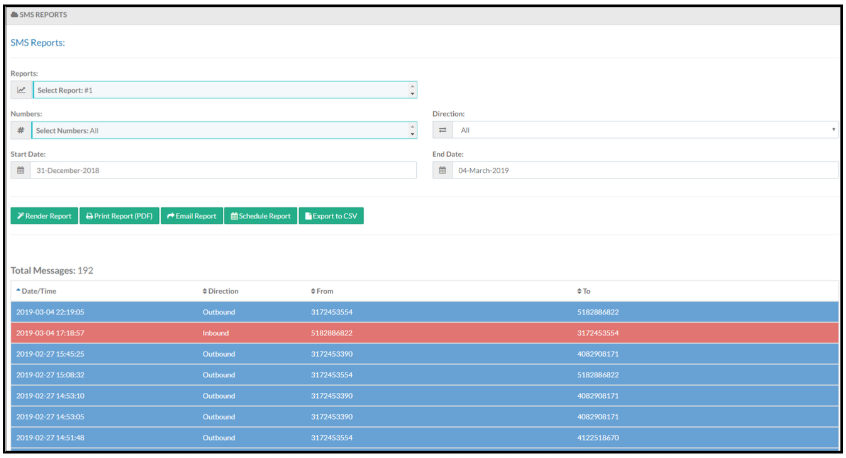
To remove a scheduled report, press the **Delete** button in the far right column of the table. Once the scheduled report has been deleted, the user will no longer receive updates in the **My Reports** section of the user panel or via email.

SMS Reports

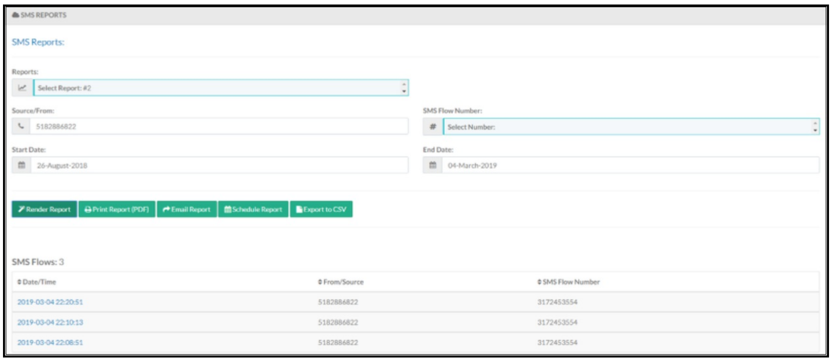
Last Modified on 03/06/2019 12:38 pm EST

There are 2 SMS reports available separated out by the number type:

- User DID data is located on the **User SMS Report** (Report #1) and includes all intersections from a user to or from a DID number. The date, time stamp, and SMS content are all visible. Use this report to view individual interactions sent out on behalf of the organization.



- The **SMS Flows Report** (Report #2) includes interactions from an SMS Flow and excludes all interactions to or from a DID number.



Wallboard

Last Modified on 10/03/2018 2:47 pm EDT

Wallboards allow call center managers to display real-time statistics to provide information about what is going on within the phone system. Wallboards can be used as a dashboard to keep managers and agents up to date with real-time call data. Information such as hold times, number of calls, average call times, and agent status are all included in Wallboards and are displayed in real time as calls occur.

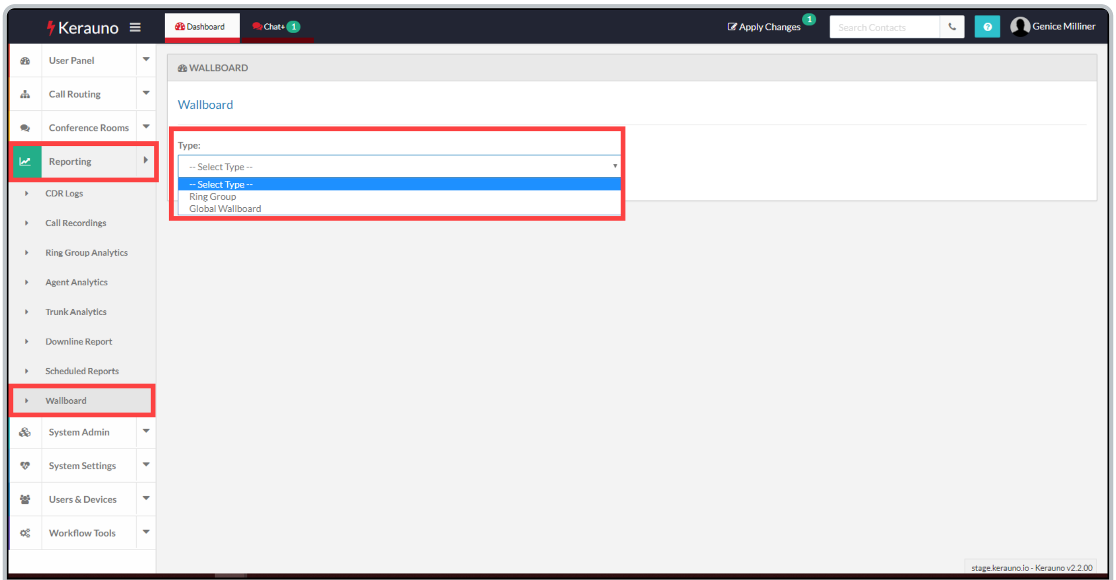


Figure 01: Create a Wallboard Options

Generating a New Wallboard

There are currently two types of wall boards in Kerauno: Global Wallboards and Ring Group Wallboards.

The major difference between the two types of wallboards is that a Global Wallboard will provide a brief overview of multiple ring groups company-wide while a Ring Group wall board will show a more in-depth view of a specific ring group.

Global Wallboards

Global ring groups allow call center managers to view a dashboard of statistics across multiple selected ring groups. Included on **Global Wallboards** are:

- A list of any active agent log-ins and which ring group the agent is a part of.
- The time and date of the last call the agent answered.
- Calls Waiting to be answered (on hold), Max Hold Time, Avg. Calls per Hour (CPH), and Abandoned Call Statistics for all selected ring groups.
- An indicator of the ring group with the highest hold time.

An example of a Global Wallboard that has been generated is shown in the Figure 02 below.

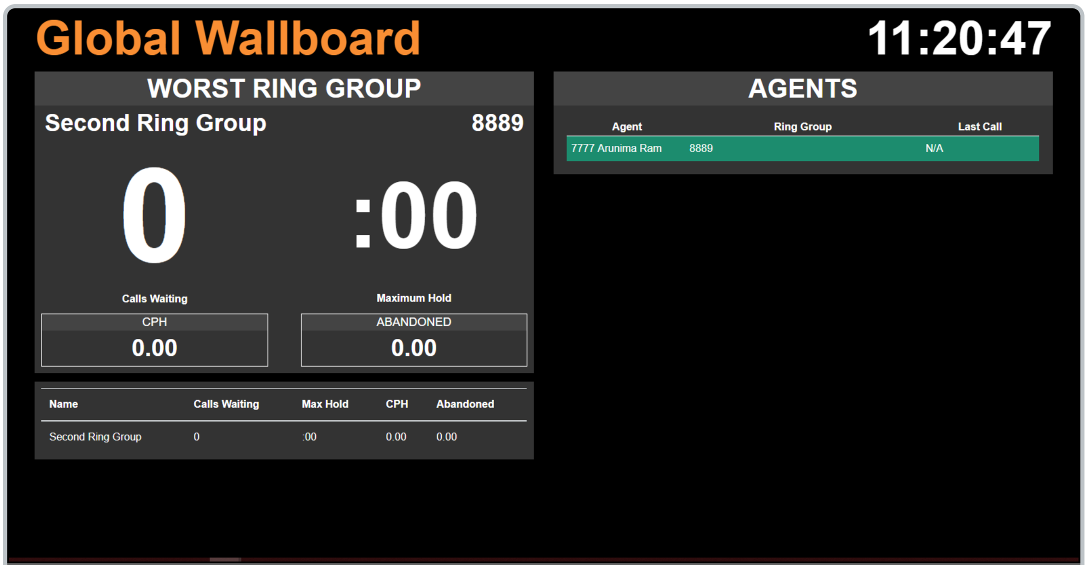


Figure 02: Example of a Global Wallboard

Ring Group Wallboard

Ring Group wallboards allow call center managers to view in-depth statics about one specific ring group. Ring Group Wallboards have the ability to display one very specific report or rotate through a set of reports.

Included in the **Ring Group** wallboard option are:

- Number of calls waiting in queue (on hold) for the ring group (On All Displays)
- Number of answered calls for the ring group (On All Displays)
- Number of agents available and number logged in (On All Displays)
- Number of abandoned calls for the ring group (Abandoned Report)
- SLA compliance statistics (SLA Report)
- Calls per hour information (min/max/average) (CPH Report)
- Hold times breakdown (min/max/average) (Hold Report)

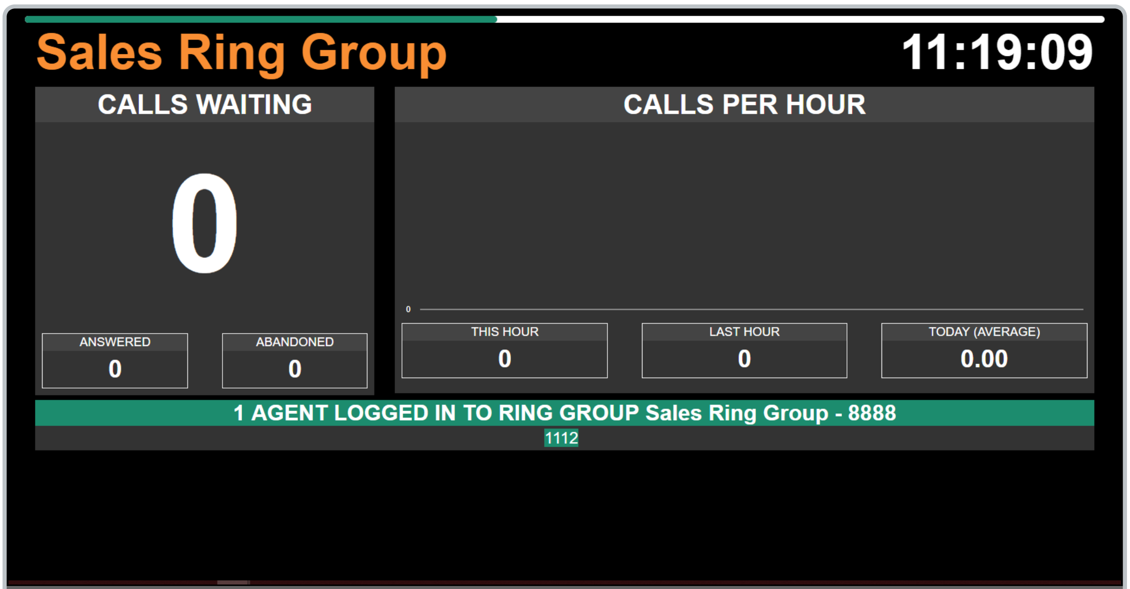


Figure 03: Example of a Ring Group Wallboard

Wallboards and Ring Groups

Once either a Global or Ring Group Wallboard has been selected, choose the desired ring groups to be displayed on the Wallboard.

If choosing a **Global** wallboard type, multiple ring groups may be selected to add to the report by clicking the blue check mark in the left hand column. To add all ring groups to the report, click the **Select All Ring Groups** checkbox in the upper left-hand corner of the screen. If choosing a **Ring Group** wallboard type, only one ring group may be selected.

After selecting a Wallboard type press the blue **OK** button.

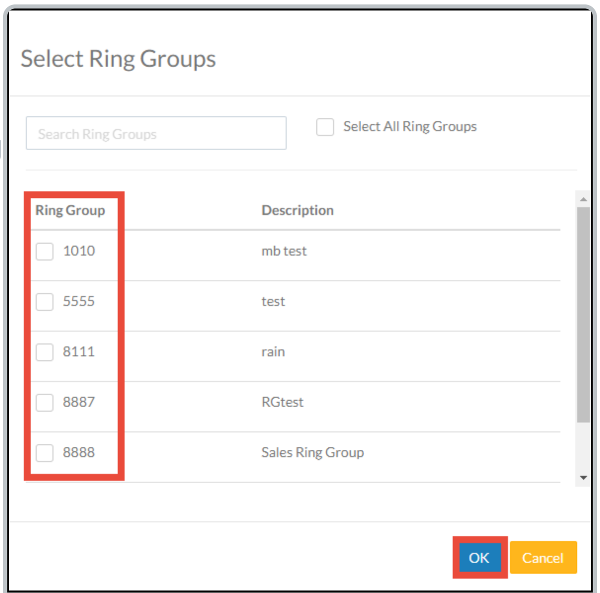


Figure 04: Select Ring Groups Screen

Ring Group Wallboard Display

For Ring Group Wallboards, an additional **Display** option that allows the user to choose which report to statically display on the wallboard is shown. Regardless of which option is chosen the call statistics displayed include: **Answered**, **Abandoned**, and **Current**. To dynamically rotate between all available reports in the wallboard, select the **Rotate Board** option from the **Links** list.

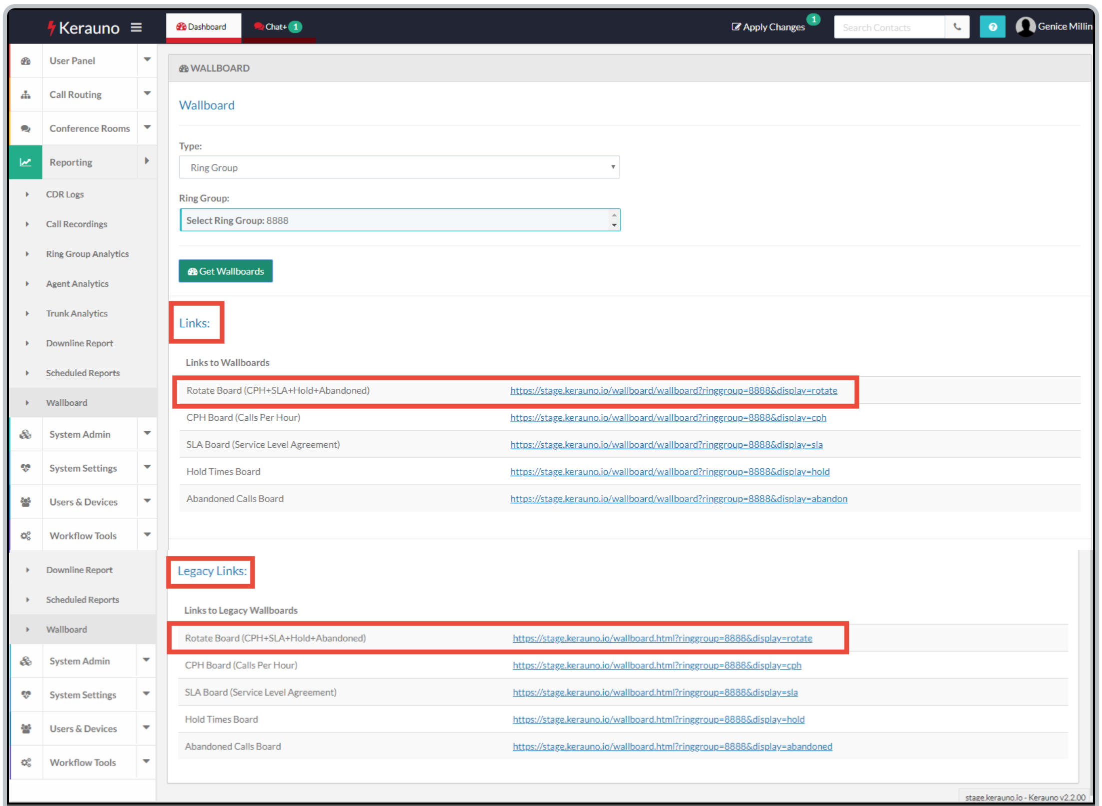


Figure 05: Rotate Between Reports

The wallboard will cycle to a new report every ten seconds.

Using Wallboards

When all fields have been completed, press the **Get Wallboard** button. A new tab or window will open displaying the wallboard. This tab can be placed on a display in a communal area so that all agents can view the ring group’s statistics for the day.

Another suggested application is to keep wallboards on a second monitor in view of the call center manager. This way, call center managers can quickly respond to any issues that arise. The cumulative statistics shown on wallboards are calculated daily, and will reset each day at 12AM.

Help & FAQs

Last Modified on 11/21/2019 2:03 pm EST

Need Help?

Review our Frequently Asked Questions below. If you still need assistance, email us at support@keraunouc.com or call 1-833-KERAUNO.

The following is a list of commonly asked questions.

User Panel

Why am I not receiving phone calls?

Ensure DND (Do Not Disturb) is off. Check physical phone (if present), softphone, desktop application (Users > Selected User > Extensions), and Presence setting. If DND is off in all areas and you are still not receiving calls, contact your Kerauno administrator.

What does *MAC00000000* or *Unprovisioned* on my phone display mean?

This content may be displayed on a physical phone that has not yet been associated to an assigned extension. Contact your administrator if they are not already working on making the connection.

Are user statuses updated to Unavailable when they log out or lock their computer?

No. Automatic status updates do not occur. However, options exist to manage Status Sync and Auto Pausing as follows:

Status Sync - Managed from System Settings > Advanced Settings > Presence tab. When Call Center Status Sync set to Yes, the user status in Presence is reflected throughout the Ring Groups they belong to.

Auto Pause - Managed from System Settings > Advanced Settings > Ring Groups tab. When Auto Pausing is set to Yes and a call is missed, the agent is automatically paused in all of the Ring Groups they belong to.

If a customer dials a representative directly that is not available, how is the call handled?

Call routing can be established to handle situations like this. Calls can escalate to another extension, another queue, or routed to an IVR menu to determine next steps directly.

Can a call be routed to a specific support level within an individual department (i.e. Level 1, Level 2, Level 3, etc)?

Yes. This is an ideal situation for agent weighting. Agents with a higher weight will be more likely to answer the call first, so different weights can be established for Level 1, Level 2, and Level 3 agents and ring into those different tiers accordingly. Weights are configurable via the admin panel and are also persistent across log-in/log-outs.

The other way to do is to establish tiered ring groups. (Ex: Call tier 1, if all agents are busy or not answering, escalate to tier 2.) Agents can be a part of multiple Ring Groups, allowing for Level 1, Level 2, and Level 3 support all as separate Ring Groups with automatic failover when a user is unavailable or no one answers. Click here to learn more about establishing Ring Group Weights.

What types of phones and devices are compatible with Kerauno?

All currently supported devices can be viewed here.

How do we add a new phone or device?

Review the list of compatible devices here. If a desired device is not listed, it may still work with Kerauno, but will not be automatically configured. Contact Kerauno to learn more about manually configuring a device.

Does voicemail transcription only work when forwarded to email?

Yes. voicemail transcription requires the **Voicemail to Email** checkbox to be active in order for transcription to be available in both the user interface (UI) and in email. This setting is managed from: User Management > Selected User > Voicemail tab.

Is Voicemail Transcription available on generic Voicemails?

Yes. Transcription for Generic Voicemail is available with version 3.1.01 or above. This setting is managed from: Generic Voicemails > Selected Voicemail > Voicemail Information tab.

Why did voicemail transcription fail?

If a voicemail fails to transcribe, first check that voicemail transcription is enabled in the user record. If the transcription is not delivered after 10 minutes, contact your partner for support.

Note: Messages with no audio content or less than 5 seconds are not transcribed.

How does Kerauno handle firmware updates to installed devices?

When a device is connected to Kerauno, it automatically pulls down the latest firmware.

Can calls be recorded?

Yes. Settings exist to record all calls with an override option for specific calls dealing with sensitive information. This setting is managed from: User Management > Selected User > Recording tab.

Can recordings be retained for longer than 90 days?

Yes. For data security purposes, data can be synced to an external FTP server.

How long is the delay between when a recipient answers the phone and when the recording begins?

Note: Recording must first be enabled on the extension/Ring Group:

- Recording begins as soon as the call is connected with an extension/Ring Group

for an inbound call.
- Recording begins as soon as the number is dialed for an outbound call.

Once a new user has been added, how do I communicate their account information?

Access the specific user from: Users & Devices > Users > Voicemail tab. Click **Send Welcome Email** at the bottom of the screen.

Chat+ / SMS

How do I enable SMS?

SMS numbers must be ported prior to enabling SMS in Kerauno. Click here to learn more.

Why am I not seeing SMS messages?

If SMS messages are not appearing, first verify the DID number and ensure SMS is enabled in the user record. If the problem persists, contact your partner for support. These settings are managed from: User Management > Selected User > DID/CallerID and Chat+ tabs respectively.

Can all phone numbers be enabled for SMS?

The vast majority of phone numbers can be SMS enabled. Depending on the carrier, there may be some additional steps required for the customer to work with their carrier to *release* the SMS capabilities of a number. A small percentage of numbers may not be portable. Click here to learn more.

How do I know if someone has opted out from SMS communications?

Alerts appear in active SMS threads when a user opts out.

Is there a Spanish option in SMS?

Yes. Spanish character sets are supported for SMS.

Why am I not getting Chat+ notifications in Chrome or Firefox?

White list all Kerauno domains to receive notifications from the appropriate browser. Learn more about white listing Kerauno domains.

Presence

What does Presence Call Center Status Sync do?

Call Center Status Sync utilizes the Kerauno Presence indicator and setting to control agent status within Queues and Ring Groups. There are additional Presence status items added to the drop-down list including Ring Group in the name. The items apply to all Ring Groups for the user.

How do I transfer a call via Presence?

There are two ways to transfer a call within Presence:

1. When on an active phone call, click the Transfer key at the top of the Presence page and select or search for the destination. Then click the Transfer button located at the bottom of the page.
2. Drag and drop the call to:

- Another user's extension or their voicemail
- Parking Lot
- Conference Room
- Ring Group

Why does my storage free space look incorrect?

Sometimes the storage space will not be 100% accurate because file size calculation will not be reflected in real time.

What types of packets does Kerauno support?

SIP-Session Initiation Protocol.

How can I troubleshoot my network?

Run a diagnostic from: http://quality.kerauno.io to see bandwidth, latency, and consistency insights.

Does Kerauno support Active Directory?

Yes. Click here to learn more.

What operating platforms does Kerauno support for mobile use (i.e., Android, iOS, carrier-based multi-OS solutions)?

Kerauno is mobile OS agnostic and works on any device via browser. Bolt softphone is supported on Android and Apple phones and tablets.

What is E911?

Enhanced 911 (E911) is mandated in the United States by the Federal Communications Commission (FCC) and ensures location information is communicated to emergency services when 911 is dialed from mobile and certain VoIP services. A Kerauno administrator is responsible for associating phone numbers to devices, users, networks, and trunks within the platform. Phone number are associated to actual street addresses by telephone carriers.

What are the top issues encountered with VoIP calls?

The top issues or call quality affecting symptoms that may be encountered during a call include:

- Choppy, stuttering, or garbled audio
- Dropped or missing audio
- Delayed audio
- Static/echoing

Click here to learn more about causes and remedies for call quality issues. (linked page in process)

What is the recommended bandwidth to support VoIP

service?

An internet connection that is stable and consistent in performance is required to ensure good voice quality. High-speed DSL, cable, or fiber connection with enough bandwidth to accommodate both regular internet traffic and the number of simultaneous voice calls is recommended. A connection with a business-level service agreement is preferable, though not required. Kerauno voice calls require 92Kbps per call (100Kbps/call, for ease of calculation; via G.711 or G.722). A speed test can be performed via http://quality.kerauno.io to confirm bandwidth.

Note: Contact your Internet Service Provider (ISP) to improve internet connectivity when speed testing shows poor performance, such as:

- Expecting 1.5Mbps, but getting only 800Kbps.
- Ping results are above 100ms or are dramatically inconsistent between pings (especially if in the US).