ELEPHANT
in
Serviced Offices

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Elephant Call Management - Serviced Offices

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Introduction

In the serviced office environment it is imperative that tight controls are kept on the access to and utilisation of the telephone system. Call management provides the means by which accurate bills may be produced for each Client representing their total telephone usage.

Elephant is the call management system that has been tailored to suit this environment and is being constantly enhanced to provide the best solution by monitoring the ever changing nature of the services you offer to your Clients. If your telephone system can provide a service, then Elephant will use information about that service to provide comprehensive management reports. Elephant will help you maximise your billing potential and utilise your resources to the full.

One of the unique features of Elephant is the ability to allocate calls generated using account/authorisation codes to the correct client. This means that a single bill may be generated for each client incorporating all calls made by or on behalf of the client.

The effectiveness of call management reports always depends on the functionality of the telephone system and the upkeep of the tables within the Elephant system (particularly Client lists, extension and account code allocations). If you operate trunk-to-trunk calls or through dials these also need to be programmed in a way that Elephant can easily identify them in order to allocate their cost.

Getting Client bills printed from the Elephant system couldn’t be simpler but there are a couple of fundamental things that need to be set up to reflect how you want Elephant to work for you.

Customising the cost of calls

How do I set up call charges?

There are a number of settings that affect the charges for calls generated by Elephant:

The default network carrier/tariff as set in the **Configuration - System configuration - Costing** window. This is the tariff structure that will be used as the default.

The **Charge factor** found in the **Configuration - System configuration - Costing** window is applied to all calls and is a simple multiplication factor applied to the call costs. For example setting the charge factor to 1.175 would add the VAT element of 17.5% to the call charges.

The charges for each carrier / tariff are set in the **Configuration - Call charges** window. Every system is installed with BT standard tariff although any others can be added. To change any values, move the cursor to the appropriate field and replace the existing value. The import and export menu options provide the facility to copy entire tariffs.

Different tariffs may be set for each client in the **Configuration - System tables - Client** window. If the network carrier is not set to **Default carrier** for a client, then any call made from an extension allocated to that client will use the carrier defined within the client database.

A **Charge factor** can also be applied to individual clients in the **Configuration - System tables - Client** window and is applied to all calls generated by any extension allocated to that client. This is a simple multiplication factor applied to the call costs. Please note that entering a value of 0.0 would mean all calls would be free!

A **Charge factor** may also be applied to individual **Account codes**. This may be used to mark up calls made on behalf of clients, for example if you are providing a telemarketing service making calls on behalf of clients.

A **Discount plan** may be assigned to each client. Any number of discount plans may be created with different discount percentages for Local, Regional, National, Mobile, International, Premium and Other calls. In addition a threshold level may be set above which the discount plan is applied.

Customising the Client

How do I add a new Client to my Elephant system?

From the opening screen select **Configuration - System tables** then select the **Client** tab and the list of the current clients will be displayed.

Select the **Add** button from the options at the bottom of the window and the system will display a pop up window prompting for the new Client information, all fields are mandatory:

Client name:	Free text string containing the name of the client, this cannot be blank.
Client code:	Unique code of up to six characters and is used as an abbreviation or account code to identify the Client. This field cannot be left blank.
Network carrier:	This field is initially set to Default Carrier and should only be changed if a different tariff is to be applied to the Client.
Charge factor:	The **Charge factor** is a simple multiplication factor that will be applied to all call for this Client. For example setting the charge factor to 1.05 would add a 5% surcharge to the call charges.

Pressing the **OK** button will create the client. In addition, the table also shows three additional fields when the Serviced Office configuration option is set, these are:

Invoice	This box should be checked if invoices are to be generated for this client.

Discount plan — If a discount plan is to be applied to this Client, select the appropriate plan from the pull down list. If this field is blank, then no discount plan will be applied.

Starting — This enables a starting threshold level to be set before the discount plan is applied. For example if this field is set to 100.0, discount will only be applied to calls once the total spend in a charge period has exceeded £100.

Once the client has been created, the next step is to assign the appropriate extension numbers.

How do I add extensions and allocate them to the correct Client?

From the opening screen select **Configuration - System tables** select the **Extension** tab and a list of the current extensions will be displayed in numerical sequence.

Select the **Add** button and the system will display a pop up window prompting for the new extension information:

Extension No. from: — Unique extension number or first number in a sequential range.

Extension No. to: — If a sequential range of extensions are to be defined, enter the highest number in the sequence otherwise leave blank.

Extension name: — Free text string containing the name assigned to the extension, if left blank the extension name will be automatically generated using the extension number.

Client: — The client must be selected from the drop down list. Never leave the client undefined otherwise the call charges will not be allocated.

Group: The secondary extension grouping may be defined from the drop down list if required.

Extension Type: It is imperative that all digital data extensions be identified here so that international ISDN calls can be calculated at the correct higher international rate.

How do I add account codes and allocate them to the correct Client?

From the opening screen select **Configuration - System tables** select the **Account codes** tab and a list of the current account codes will be displayed in numerical sequence.

Select the **Add** button and the system will display a pop up window prompting for the new account code information:

Account code: Enter a unique numeric account code (leading zeros may be included).

Account name: Free text string containing the name assigned to the account code. Please note that this field may not be left blank.

Client: The client must be selected from the drop down list. Never leave the client undefined otherwise the call charges will not be correctly allocated.

Charge factor: The **Charge factor** is a simple multiplication factor that will be applied to all calls with this account code. For example setting the charge factor to 1.05 would add a 5% surcharge to the call charges

How do I reallocate / edit extensions?

From the opening screen select **Configuration - System tables** and select the **Extension** tab and a list of the current extensions will be displayed in numerical sequence.

To modify a field, move the cursor to the field to be modified and amend the entry as required. Please note that the Client and Location fields are pull down lists and the pertinent entry should be selected.

Are all extensions/account codes allocated or am I losing revenue?

Before executing the billing process, it is recommended that you check that all used extensions and account codes have been allocated to clients.

From the opening screen select **Report - Statistics - Resource check** and enter the appropriate start and end dates. The system will then produce a report itemising all the resources (extensions, account codes, DDI numbers and trunks) that have been used but are not set up in the system tables. If the serviced office configuration option is selected, the system will automatically select the most appropriate options to ensure that call charges are maximised. A close eye should be kept on outgoing calls on extension and account codes. Once recognised these can be added using the above instructions.

Customising the Reports

What is the easiest way for me to produce bills for my clients?

After the check for unallocated extensions has been performed, the client bills may be generated. The best method of producing client bills is via the **Report - Telephone bill** option. Upon selecting this option, the Client (itemised) radio button will be selected by default. The Client (Summary) produces a more concise bill showing extension and account code totals rather than call by call.

Enter the appropriate period and select the client from the drop down list to produce an individual report. If all bills are required, leave the Client blank and when you select **Print** you will be asked if you wish to Print a bill for every Client; select **Yes** and all bills will be printed.

To reduce the quantity of paper used, either tick the **Single page** check box which will only produce a single page report listing the forty most expensive calls or set the **Minimum itemised call charge on bill** in the **Configuration - System configuration - Costing** window to the value below which calls will not be itemised although their cost will still be summarised on the bill.

From **Report** you can produce a **Bill summary by Client** and also **Export Data** to **Centre Charge**, **BCM**, **Storm** and **IBCS** applications.

If you only wish to produce bills for Clients and exclude your own extensions then in the **Configuration - System configuration - Options** window, set the Configuration option to Serviced office. This will allow you in the **Configuration - System Tables - Client** tab to select which individual clients are to be included in the invoicing and the export.

Once you are happy with the billing procedure you may wish to set these reports up in a schedule which can run automatically at any time you specify.

How do I set up an automatic report schedule?

From the opening screen select **Reports - Report Scheduler - Create schedule**. A blank schedule sheet will appear. From the menu select **Add** and choose a report type and specify the report period then add another. Once you have entered all of the required reports in the schedule, close the window.

When you want print the reports on the schedule select **Reports - Report Scheduler** - **Manual Execution**. Select the schedule from the list and then select **Run**. The reports on the schedule will be produced.

What other reports can help me manage or enhance our service?

Elephant provides an infinite range of reports highlighting overall scenarios down to the smallest details so the better you know the system the more you will realise its potential. Certain market sectors though do utilise certain reports on a regular basis along side the Client bills and sometimes to compliment the service provided to their Clients.

Standard reports are as easy to produce as bills and, depending on your telephone system, the system can illustrate such things as:

Lost calls with the callers number for each call
Operator response times
Answer analysis (measured against user defined targets)
Incoming or outgoing Telesales analysis
Summary by specified or dialled number
Optimum exchange line usage
DDI summaries with CLI

Setting up customised tariffs

It is possible within Elephant to have separate tariffs for each Client, thereby offering the most comprehensive solution for telephone billing possible. However, in reality, over use of this feature results in the system becoming difficult to manage.

As part of the standard support contract you will have access to the current BT standard tariff which is updated on a regular basis. The latest tariff can be downloaded from the web site www.willsconsulting.co.uk. It is not recommended to modify this tariff as your amendments will be lost when an Elephant update is installed.

How do I create a custom tariff?

Should you wish to create a custom tariff for a client it is recommended that you copy a standard tariff and modify only the pertinent values. From the main menu select **Configuration – Call charges** and the system will display a table containing all charge bands for all tariffs.

To create a custom tariff select **Add** from the menu and the system will display a window prompting for the new tariff name and that which is to be copied. It is also possible to factor different charge types within this option. Pressing the OK button will cause the system to create an entire tariff based upon an existing one.

Modify the appropriate entries within the tariff as required.

How do I apply a custom tariff?

To allocate a custom tariff to a Client, from the main menu select **Configuration – System tables** and select the **Client** tab. Locate the Client and select the custom tariff from the drop down list in the **Carrier/tariff** column. Please note that to implement the changes for existing calls it is necessary to recalculate call charges using the menu option **File – Recalculate costs**.

Setting up discount plans

Rather than managing customised tariffs, a simpler approach to customised call charging is the use of discount plans. Elephant allows you to create any number of discount plans which can be applied to each client when the bills are produced. You can also set a threshold for each client before the discount is applied

To set up discount plans from the main menu choose **Configuration - Discount plans**. To create a new discount plan select **Add** from the menu and an empty discount plan will be created. Type in the name of the plan and indicate the discount to apply to each call type eg 5.0 would be equal to 5% discount. You can also increment certain call types by using a - symbol eg -5.0 would be equal to 5% increase.

To allocate a discount plan to a client go to **Configuration - System tables** and select the **Client** tab. Click on the dropdown list for the discount plan and choose the correct plan. You may also set the starting call spend threshold to be reached before the plan applies

Discount plans will only apply when producing telephone bills, profit reports or exporting to service office accounting packages eg BCM and Centre Charge.

Through dialled (trunk to trunk) calls

The ability of Elephant to allocate through dialled calls to the correct Client is one of the unique features that make Elephant the ideal solution for Serviced Offices. These calls may be generated in any of three manners:

i. Manually answering an incoming call and transferring the call to a manually dialled outgoing call.
ii. Using the *divert all calls* feature from an extension.
iii. Setting the PBX so that all calls coming in on a DDI are diverted unconditionally.

Whatever the method of generating trunk to trunk calls, it is imperative that the cost of the outgoing legs of every trunk to trunk call is allocated to the appropriate Client for billing purposes. Each method of generating such calls requires different solutions.

i. The conventional method of diverting incoming calls is to use a speed dial to connect to a mobile or alternative telephone number. To correctly allocate the charges for these calls, the Clients account code should be included within the speed dial.
ii. When an extension is on divert all calls, the telephone system will report on the extension that generated the divert. Please note that for the Avaya Definity, call splitting must be enabled and the extension must be a physical extension.
iii. When the PBX diverts all calls, there is no extension number used for the call and, consequently, the account code for the pertinent Client should be included in the divert.

Maintenance

How do I back up data?

The system stores data in a number of database files all of which should be backed up on a regular basis. These database files all have the suffix .DBF, the index files which have a suffix of .CDX do not need to be backed up as they can be rebuilt by the system.

All the system tables may be backed up to a removable media, such as floppy diskette, using the option **File - Backup data - System tables**. The system will prompt for the date period and location of the backup files.

How much data should I hold on to and how should I do it?

Although there are no limits to the quantity of calls that may be stored within Elephant other than the physical size of the hard disk, it is advantageous to remove old data once it is no longer required. The calls are divided into separate databases for incoming and outgoing calls each of which may be archived (backed up) as separate files.

There is an option to automatically archive and then delete calls after a defined number of months. To enable this option, select **Configuration - System configuration - Options** and set the **Auto archive - number of months to retain** to the required value. Once calls are older than the specified age, the system will archive the calls to disk files with a generated filename. The format of the filename is **DBF_YYMM.nnn** where **DBF** is the database abbreviation (INC-incoming, INT-internal or OUT-outgoing), **YY** is the last two digits of the year, **MM** the month and **nnn** a sequential number. For example INC_0202.001 would be the first archive file for incoming calls in February 2002.

Call data may be archived manually. From the opening screen select **File - Database management - Backup calls** and then select either **Incoming calls**, **Outgoing calls** or **Internal calls** as required. The system will then prompt for the archive period and file name, a suitable convention for naming monthly backup files is to use the year, month and call type (eg 200304.OUT for outgoing calls during April 2004).

Should I be deleting call data and when?

After call data has been archived, the calls may be removed from the system using a two stage process. First, from the opening screen select **File - Database management - Delete calls** and then select either **Incoming calls**, **Outgoing calls** or **Internal calls** as required. The system will prompt for the period during which the calls are to be marked for deletion. To permanently remove the calls from the database, from the opening screen select **File - Database management - Remove deleted calls** and then select either **Incoming calls**, **Outgoing calls** or **Internal calls** as required . Please note that once the calls have been deleted, they can only be recovered from an archive file.

How can I tell if the system is not logging any calls?

In order to prevent any loss of call data Elephant has an alert system in place which will flash on the screen or sound when the log calls screen fails to receive any calls for a specified number of minutes.

To set up the alert time thresholds select **Configuration - System Alerts** and specifying the number of minutes you would expect calls to be recording for each period. A zero setting switches the alert option off.

The alert can also flash and sound across the network on another PC with Elephant installed and the **Utility - Monitor Logging** activated.

Where the PC has been configured to send E-mail an E-mail notification of the alert can be sent to an address set up in the System alert screen.

Installing Elephant on the Network

Your Elephant licence allows you to install multiple copies of the software across your network and is restricted only by the number of telephone systems it serves. First you need to enable the database files to be opened in shared mode, select **Configuration** - **System Configuration** and check the **Share Database files** on the **General** tab and press **OK**.

Locate the shortcut to Elephant on the logging PC using Windows Explorer. Right click on the Elephant Call Management icon and select the properties option. In the shortcut tab append **/L** to the target to identify that this system is the one that will log calls, typically the target should be:

C:\Elephant\Elephant.exe C:\Elephant /L

Tip: Right click on the start button to access Windows Explorer.

To activate these changes you must close and then restart Elephant Call Management.

To install the system on another PC on your network for reporting, insert the Disc into the CD ROM drive. The program should start automatically, if not select the **Start - Run** option from the Task bar and enter the command **D:\SETUP.EXE** in the dialog box (where **D:** is the CD-ROM drive).

Follow the screen prompts to install the system and then remove the CD-ROM.

When you start the system for the first time you will be prompted for the installation option, select **Install remote (network) access**. The system will then prompt for the location of the database files which may be specified as a mapped MD-DOS drive and directory (eg P:\Elephant), a network IP address and folder (eg \\192.168.1.4\c\Elephant\) or a network name with folder (eg \\Logger\C\Elephant\).

Configuring Elephant for a Serviced Office

Elephant incorporates a number of features that enable it to be ideally applied to Serviced Offices. To activate these features the Serviced Office configuration option must be set.

From the main Elephant screen select **Configuration – System configuration** and select the **Options** tab. The screen contains a number of options that are pertinent for Serviced Offices:

Primary extension group name This defines the title for the main method of grouping extensions. In this document *Client* has been used ad the primary group name but you may prefer either *Tennant* or *Company*.

Secondary extension group name This defines the title for the secondary method of grouping extensions and should be set to reflect a suitable name such as *Department* or *Group*.

Configuration option This must be set to Serviced Office to enable some of the advanced features that are specific to Serviced Offices.

One of the unique features of Elephant is the ability to automatically include calls made using account codes on telephone bills. To enable this function select the **Costing** tab from the **System configuration** and check the box labelled **Include account code calls on bills**.