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Versa3CX Installation and Usage Guide

Document Revision History

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2.0	25/06/2013	Morris Bahrami	Initial Version

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Prepared, Review and Approved by			Signature	Date (dd/mm/yyyy)
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1 Introduction

This document describes the installation and usage of versa3CX developed by VersaDev.

2 Overview

Versa3CX consists of a server component called versa3CX_Server and a client component called versa3CX_Client. Versa3CX_Server is installed on the same server hosting the 3CX phone system. Versa3CX_Client is installed on computers of each help desk staff responsible for attending to phone calls. When a phone call is received and the phone is picked up to answer that call, versa3CX_Client causes versaSRS to launch with the Caller ID of the call. This significantly enhances the efficiency of the help desk staff to service customers as the staff can immediately see the contact details of the caller.

versaSRS is a thin-client Web browser delivered service request / ticket management system developed by VersaDev. Tickets are created manually by system operators or automatically by emailing directly in to the system. Each ticket contains the contact details of the requestor, typically first name, surname, telephone number and email address. Contact details are obtained from the contacts module or manually entered by a system operator. The contacts module is populated by manually entering data or by importing data from other contact repositories such as Active Directory or Customer Relationship Management (CRM) systems.

System operators that manually enter new tickets generally receive a new request via a telephone call. Requestors may follow up these requests with a telephone call. Therefore, to improve this process versaSRS has been enhanced to integrate with the 3CX phone system through versa3CX application.

3 Versa3CX_Server Installation

Vesa3CX_Server is a Windows service to be installed on the server hosting the 3CX system. It monitors the phones received by the system and through a configurable port number informs clients listening to that port number of the phones received, the caller ID and the status of the call (e.g. Ringing, Connected, etc). The system administrator needs to run the Versa3CX_Server installer.

The configuration file associated with this service includes the following configurable items:

Item	Description
PortNumber	The port number used to communicate with clients. Default is 8888. If this value is changed then all clients need to be re-configured to use the new port number.
DebugLogFileName	Location of the log files.
DebugLogFileMaxSize	The maximum file size for log files in kilo bytes. Default is 2048.

The Firewall on the server needs to be set to allow the "In" communication for the port number specified above.

4 Versa3CX_Client Installation

Versa3CX_Client is installed on each computer of a help desk staff responsible to attending to phone requests. The administrator needs to adjust the client application configuration file before distributing it.

The configuration file associated with the client includes the following configurable items:

Item	Description
SrsUrl	The URL of where the versaSRS is installed.
TxtServer	The server running 3CX phone system.
PortNumber	The port number used to communicate with the server. Default is 8888.
RefreshRate	The rate in milliseconds that client gets updated. Default is 500 and is adjustable by the user.
MyPhoneNumber	The phone number of the user, adjustable by the user.

The following figure shows this application:
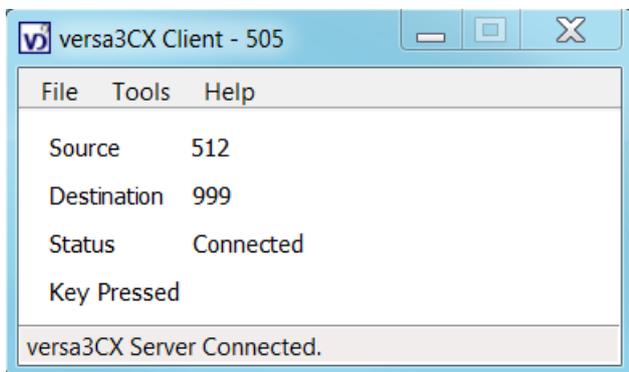
The title of the window includes the phone number configured for this instance. In the above example it is 505.

By default whenever a phone call is received and the phone is picked up to answer that call, versa3CX Client causes versaSRS to launch with the Caller ID of the call. The user can disable launching versaSRS by un-ticking "Launch versaSRS" menu selection as shown below:
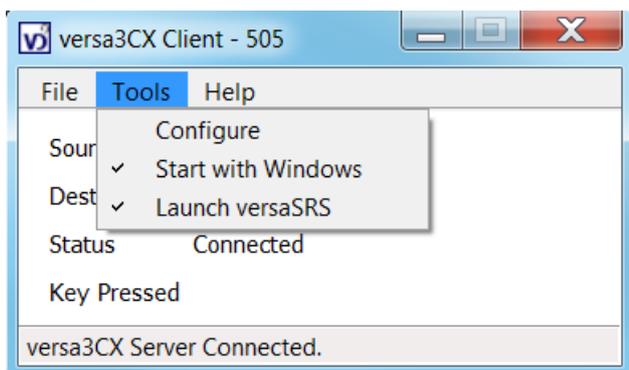
The user can set their phone number or extension and refresh rate which is in milliseconds, by selecting **Tools > Configure**. This will bring the following window:
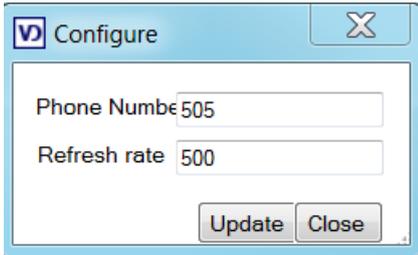
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The user can "hide" the application by selecting **File** > **Hide** option as shown below:
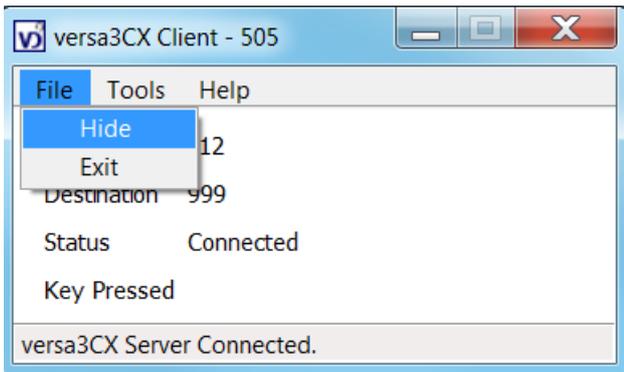
This will cause the application to "hide" but still working. To "Show" the application again, select the application's VersaDev's icon form the bottom tray as circled below:
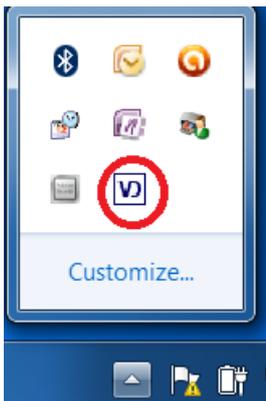
Right click on the icon and select "Show", as shown below:

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This will cause the application to be shown again.

When the phone is picked up to answer a call which has the destination as the Phone Number indicated in the configuration, then versaSRS will be launched with the caller ID (source) information.

If the connection to the versa3CX Server is lost, or the versa3CX Server service stops working, then an error message will be displayed on versa3CX client as shown below.