



IPSMARX TECHNOLOGY, INC

Innovative VoIP Solutions

BUSINESS READINESS TEAM

Rapid Quick Guide

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INITIAL SYSTEM SETUP

Please follow the below steps to setup your system with the initial basic options, please follow the right order.

1. Use your system link to Login <http://YourSystemIPAddressGoesHere/softswitch/Login.aspx>

Default credentials are:

Username:admin

Password:admin

TWO VIDEO TRAININGS:

<https://ipsmarxdemo-training.webex.com/ipsmarxdemo-training/ldr.php?AT=pb&SP=MC&rID=102514022&rKey=2c73072f3ae67cd0>

<http://www.youtube.com/watch?v=1aO1qb-HAO4>

2. System settings - Manage Sipkernel Users – Define staff user’s credentials to access to the system.

TWO VIDEO TRAININGS:

<https://ipsmarxdemo-training.webex.com/ipsmarxdemo-training/ldr.php?AT=pb&SP=MC&rID=102514032&rKey=931d74e6113c66ae>

<http://www.youtube.com/watch?v=UVY8WkDIFlo>

3. System settings - Manage Company Information – Enter you Company information, time zone and E-store website link.

TWO VIDEO TRAININGS:

<http://www.youtube.com/watch?v=LjbePrIqXel>

<https://ipsmarxdemo-training.webex.com/ipsmarxdemo-training/ldr.php?AT=pb&SP=MC&rID=102514042&rKey=98f2d5ebaa6f5417>

4. Manage Providers - Manage Endpoint Carriers –Add your SIP termination providers here. IPSmarx is set up already as your Carrier because we gave you a \$10 test account so there is no need to do anything here until you actually have a new carrier to add, regardless go over the video so you learn about it.

TWO VIDEO TRAININGS:

<http://www.youtube.com/watch?v=sTft7P94wY4>

<https://ipsmarxdemo-training.webex.com/ipsmarxdemo-training/ldr.php?AT=pb&SP=MC&rID=102514052&rKey=ec8d02d9f8a37467>

5. Manage Rates - Manage Buying Rates – Import the buying rate table from your Carriers into the system.

TWO VIDEO TRAININGS:

<https://ipsmarxdemo-training.webex.com/ipsmarxdemo-training/ldr.php?AT=pb&SP=MC&rID=102514062&rKey=49f2f676931b6b38>

<http://www.youtube.com/watch?v=cMAYKiil9pg>

6. Create your Service Packages

6.1 Manage Rates -Manage Selling Rates – These refers to the p/min selling rate tables.

TWO VIDEO TRAININGS:

<https://ipsmarxdemo-training.webex.com/ipsmarxdemo-training/ldr.php?AT=pb&SP=MC&rID=102514082&rKey=fa82a464af8ac57b>

<http://youtu.be/dx3bnZJobY8>

6.2 Manage Services - Manage tax Profile – Define tax items and group them into tax profiles.

These are taxes per call. For Calling card typically there are not tax profiles so you can use the one that is already in the system as “No Tax” or you can create a “No Tax” Tax profile.

TWO VIDEO TRAININGS:

<https://ipsmarxdemo-training.webex.com/ipsmarxdemo-training/ldr.php?AT=pb&SP=MC&rID=102523767&rKey=c897bd7ea500834d>

<http://www.youtube.com/watch?v=o61SOTSbyoo>

6.3 Manage Services – Define/Manage Services – Define the service packages that will be assigned to home Service customer accounts. The service packages include the p/min selling rate table, tax profile per call.

VIDEO TRAININGS for service packages WITHOUT monthly packaging:

<http://www.youtube.com/watch?v=kNoEOSpNg>

<https://ipsmarxdemo-training.webex.com/ipsmarxdemo-training/ldr.php?AT=pb&SP=MC&rID=102523787&rKey=c65636db6773e01e>

7. **System settings - Manage Dialplan** – Dialplan is where call routing is managed, for each code destination a carrier or a set of carriers can be lined up based on priorities to connect the calls that your customers are making. For now you have IPSmarx as your carrier because of the \$10 dollar test account we gave you so you will only need to work on your dialplan if you add a new carrier(s).

TWO VIDEO TRAININGS:

http://www.youtube.com/watch?v=6w_Ag22NwiM

<https://ipsmarxdemo-training.webex.com/ipsmarxdemo-training/ldr.php?AT=pb&SP=MC&rID=102514092&rKey=70088320cd1e01f6>

8. **Manage DIDs - Manage DID providers** – Set up your DID provider company(s) by entering their contact information, their IP address(s) and importing into the system the DIDs you have with each DID provider. DIDs, DIDs can be used as access numbers for service like calling card, pinless or as virtual numbers for services like residential, direct DID, IPPBX, etc.

You can also add a DID access number manually to learn how to go to option #9 of this guide.

VIDEO TRAINING:

<https://ipsmarxdemo-training.webex.com/ipsmarxdemo-training/ldr.php?AT=pb&SP=MC&rID=102514102&rKey=ee50854846586e27>

Note: when you get DIDs from a DID provider, usually you need to provide them with your IP of your system and they provide you with their IP address(s), to start and test you should get at least one DID for you to use as your access number, later once you are ready to launch the business you can get the rest of them. If try and failed at setting up your DID provider, please create a ticket and provide our support team with the IP of the DID provider and the DID number so they can set it up for you but first try setting it up yourself.

9. **Manage DIDs - Manage DID pool** – Set up manually your DID numbers here one by one under “Manage single DID” and allocated to the service you want this DID to be used for or here is where you view the inventory of DIDs if you have imported them through the option Manage DID provider, step #8 of this agenda and initial system setup guide.

VIDEO TRAINING:

<https://ipsmarxdemo-training.webex.com/ipsmarxdemo-training/ldr.php?AT=pb&SP=MC&rID=102514112&rKey=e74d535a0e18b05f>

10. **Manage Cards- Manage Access Numbers** – here is where you apply settings per access number. Select from the bottom of the screen each access number you have (those you added them in step #9 of this guide)

Once the access number is selected apply or not a per minute charge or onetime fee per call.

Enable or not multisession key and choose ## or ** - this enables the clients to make a second call without Having to hang up completely to make the 2nd call.

Enable or not the announcement for the last minute on the call.

Choose to announce balance and time, or just time or just balance (money) or none of them.

Enable pinless feature.

Make sure to assign the language to the number, the system by default only comes with one language IVR, English.

If you wish to add more languages of the ones we have you can contact your sales account manager to inquire for it.

VIDEO TRAINING to manage access numbers for Calling card or Home Service:

<https://ipsmarxdemo-training.webex.com/ipsmarxdemo-training/ldr.php?AT=pb&SP=MC&rID=102514132&rKey=7dce7dcef7f5902d>

11. **Help/Back up -Download SIPKernel Call Monitor** –This is a call monitor application that can be installed in any PC to monitor real time the incoming and outgoing calls. Click on this link <http://www.ipsmarx.com/version6/download/callmonitor.zip> to download and open the call monitor file, double click on the file name “CallMonitor.msi” to install it. Once the installation is completed you will see on your desktop computer the IPSmarx call monitor icon please double click on it to open it then click on “configuration” and enter the following credentials:

Host: enteryourIPAddresshere

Port:20235

username:admin

password:admin

Click on save and accept and your call monitor will be connected to your system ready for you to monitor calls.

VIDEO TRAINING:

<https://ipsmarxdemo-training.webex.com/ipsmarxdemo-training/ldr.php?AT=pb&SP=MC&rID=102527817&rKey=7dba2b57aefb4240>

12. E-store – (if you did not purchase E-store please skip this step) E-store is an e-commerce page where your customers can sign up online or login into their portal.

12.1 Post your services online – Define/Manage Services – select the service package, check the option “This service is available for customers who sign up online” enter the service name, description and image to set this service available for customers that sign up for your service through E-store website.

12.2 Manage Email Templates – Work on the different templates available for the system to email out the template whenever needed. For example, templates like “Home service online payment”, “Online registration”, “Contact us template”, “Online account recharge”, etc.

12.3 Manage Payment Method – Set up for the merchant account that will be use (paypal or paypal pro, authorize.net or Google checkout, Barclay card)

12.4 Manage Registration Fields – you can manage the fields (Name, Address, Phone number, etc) used in the registration form when customers sing up online through E-store.

VIDEO TRAINING:

<https://ipsmarxdemo-training.webex.com/ipsmarxdemo-training/ldr.php?AT=pb&SP=MC&rID=102527797&rKey=fb8fda99dd4beca9>

12.5 Fraud Control –(if you did not purchase E-store please skip this step) It will set the accounts from customers that sign up online under status “inactive” until the system administrator approves or rejects it when displaying the list of accounts that are acknowledged pending for approval or not. This option is by default disabled in the system, it can be enabled from the option System settings – System configuration.

VIDEO TRAINING:

<http://www.youtube.com/watch?v=l71zw69xBc>

13. System settings - Manage Company Information – Manage Email Agent – Set up your Email server information, once this is completed the system will be able to send out via email the several Email templates available within the system, within option No. 12.2 of this guide.

<http://www.youtube.com/watch?v=b6tVKHj-6Zg>

STEPS TO CREATE A PINLESS HOME SERVICE CUSTOMER ACCOUNT

Please follow the below steps in the right order.

Remember to **create a Service package for Home Service** – Please refer to option #6.3 from the “INITIAL SYSTEM SET UP GUIDE”.

1. Manage Clients – Manage Customers – Create a home service (pinless) customer accounts

1.1 General – enter the client contact information, email and password and submit it.

1.2 Payment – add/manage payments (deposit, credit, security deposit, discount)

1.3 Recharge – enable automatic recharge (only if you purchased this module) and enter the client credit card information. Make sure to use authorize.net or PayPal pro as your payment gateway for automatic recharge to work under E-store – Payment method.

1.4 Notes – add notes in reference to the particular customer account you are working on.

VIDEO TRAININGS:

<https://ipsmarxdemo-training.webex.com/ipsmarxdemo-training/ldr.php?AT=pb&SP=MC&rID=102531047&rKey=2b85c62c6c8a244d>

1.5 Home Service – assign the service package and click on submit, and then enter the pinless phone number.

VIDEO TRAININGS:

<https://ipsmarxdemo-training.webex.com/ipsmarxdemo-training/ldr.php?AT=pb&SP=MC&rID=102531077&rKey=800e69aa25c4290a>

- 1.6 **Invoice** – (if you did not purchase invoicing please skip this step) enable or disable automatic invoice for the customer account, if you do enable it, select the Invoice frequency type (end of the month, weekly, etc), enter the amount of days the client will have to pay for the invoice, enable the option to email the invoice once it is generated, enable or disable recurring billing and select the option for package penalty type.

VIDEO TRAININGS:

<https://ipsmarxdemo-training.webex.com/ipsmarxdemo-training/ldr.php?AT=pb&SP=MC&rID=102531057&rKey=6bae684f1ce0d07f>

STEPS TO CREATE A CALLING CARD

Please follow the below steps in the right order.

1. Go again to **Manage Services – Define/Manage Services** – Choose service type “Calling card” and create the calling card by entering the information the system there is asking you for and once completed click on ADD.

VIDEO TRAINING:

<http://www.ipsmarx.com/version6/trainings/Creating-a-CallingCard-Service/Creating-a-CallingCard-Service.html>

2. How to **generate PINs** for the calling cards you create; go to **Manage Cards- Generate/Manage PINs**.

VIDEO TRAINING:

<http://www.ipsmarx.com/version6/trainings/PIN-Generation/PIN-Generation.html>

HOW TO TEST CALLING CARD OR HOME SERVICE

1. Open your call monitor – this is instructed in the item #11 of INITIAL SYSTEM SETUP of this guide.
2. Dial your access number – once it has been setup according to how it is instructed in the item #8 and #9 of INITIAL SYSTEM SETUP of this guide.
3. You will use the PIN from your home service account the account you created under option #1.5 of **STEPS TO CREATE A PINLESS HOME SERVICE CUSTOMER ACCOUNT** of this guide, or use the PIN of your calling card. You only would not need to enter the PIN if you have setup your phone number as pinless.
4. After you enter your pin number you will dial the destination you want to reach remember to use Country Code + Area code + phone number.
5. Go to Reports – CDR report and display the call records you just made so you can learn how to read the reports.

OTHER

1. Reports

- 12.1 ACD report
- 12.2 ASR report
- 12.3 Card Report
- 12.4 CDR report
- 12.5 Customer payment report
- 12.6 Customer Report

VIDEO TRAINING on Reports:

<https://ipsmarxdemo-training.webex.com/ipsmarxdemo-training/ldr.php?AT=pb&SP=MC&rID=102527807&rKey=00d708caf86e0b25>

System Configuration

<http://www.youtube.com/watch?v=0pkFRfPP8mo>

2. **Help/Back up -Database back up** – click here to manually back up your system data base and download the backup file to save it in your C drive or an external C drive or USB memory.

ABOUT ESTORE

*** IPsmarx strongly recommends using an IPsmarx Certified Web Designer for your web design and E-store integration needs. Please find the contact information of certified web designers below:

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Site: www.francysolutions.com Mail: info@francysolutions.com

Shovan Moullick - Account Manager

Indus Net Technologies Pvt. Ltd. shovan@indusnet.co.uk

UK: +44 20 8816 7655 Fax : +1-760-284-6062

Please understand that will not able to offer assistance if you are experiencing problems on your e-store and are working with an uncertified designer. Our Technical Team will have to restore your E-store to factory defaults in such a case. We also offer a web design certification program for a web designer you are considering working with that that has not received the training. The cost of the program is \$1,500 and can be done remotely.

CUSTOMER ONLINE PORTAL ACCESS

CUSTOMER PORTAL ACCESS -(if you did not purchase E-store please skip this step)

1. Access to customer portal from your E-store website.

Go to this link <http://your system IP address goes here/estore/main.aspx>

Go to "Login" or "My account"

Login with the email and password that was entered under option #1.1 "General" from the guide "STEPS TO CREATE A PINLESS HOME SERVICE CUSTOMER ACCOUNT"

Home service subscribers will be able to manage the following when they access to their portal.

1. Account Summary
2. Profile
1. Make Payment
2. Payment History
3. Usage History
4. View Invoice
5. Pinless Access
6. Access Numbers
7. Rate Calculator
8. Change Password
9. Log Out

TICKETING PORTAL LINK

At IPsmarx, Technical Support and Training is 100% ticket-based and NOT via email.

Logging into the Ticketing System is easy and you can use it to open tickets related to support or training.

Link: <http://www.ipsmarx.com> (see LOGIN section at the top right hand corner)

Email Address: the one Maryam sent you via email

Password: the one Maryam sent you via email