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PhonePad 5 Admin Guide

by Cybercom Software

PhonePad 5 Admin Guide

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Chapter



1

Introduction

Introduction

Welcome to PhonePad 5.

This guide covers just about everything you need to know as a PhonePad 5 administrator.

If you are upgrading from PhonePad 4 then you will find that PhonePad 5 has a lot of changes and improvements.



While all due care is taken in the writing of this admin guide, it's possible that there are errors because we have overlooked something.

If you find that there is missing, incorrect, incomplete, or out-of-date information, please contact us and let us know. We'll do our best to get it corrected quickly.

Just send an email along with the details to support@cybercom-software.com.

Thanks.

What's New in PhonePad 5

If you're new to PhonePad then this section may not be of much interest to you. But if you are a PhonePad 4 user then you will find that there have been a lot of changes in this new version of PhonePad.

Changes for Users

There are many changes and new features for the end user. Let's have a look at some of them.

Changes and New Features

New Feature or Change	Details
Welcome Screen	Optionally displays at startup. Includes handy links and shows an overview of message status in the form of charts.
Multi-Tab Toolbar	The toolbar features multiple tabs that are based on functionality, providing a way to quickly get to the features you need.
Folder Tree	The sidebar in PhonePad 4 has been replaced with a folder tree that conveniently shows all of your folders in one place, making it easy to

	access your folders at any time.
Deleted Folder	Messages that have been deleted are now stored in each user's Deleted folder where they can be easily undeleted if needed. The system automatically clears out any messages that have been in the Deleted folder for more than 14 days.
Outgoing Messages	You can now log Outgoing messages, giving you a complete record of interaction with your clients.
Personal Folders, Public Folders, Group Folders	Personal and Public folders are now grouped separately. Group folders can be set up by administrators so that only members of a group can access them.
Groups	Replacing the old Distribution Groups from PhonePad 4, the Groups option allows messages to be sent by a group simply by selecting or entering the group name.
Caller Information	Select a message and details of the caller appear on the Caller Information tab. This allows you to view contact details without needing to open the message.
Preview	Select a message and the Preview tab allows you to review the contents of a message before opening it.
CallFlow	View a history of all phone calls with a caller, both in and out, including follow up notes.
Reminders	Set reminders to remind you to follow up phone calls.
Instant Chat	PhonePad 5 includes an instant messaging application.
Improved Message Lists	The message lists are now faster, smoother and easier to use.
Integrated Search in Message Lists	Each message list in PhonePad 5 includes an integrated search feature, allowing you to quickly find a message.
Reference Field	Phone messages now have a Reference field that you can enter any text into. It could be a client number, patient number, file number, or whatever you like. PhonePad remembers these references so that they can be used in other messages.
Category	Phone messages now have a Category field that can be used in messages to categorize your messages. You are free to use categories however you wish.
I Forgot My Password	If you can't remember your PhonePad password when trying to login, you can click the I Forgot My Password link and have your password sent to you by email, SMS or Pushover.

Maps for Caller Locations	The Address Book has been expanded to allow you lookup and store the location of each callers address on Google Maps.
Remote Access	It is now easier to set up remote connectivity for users working out of the office.

Changes for Administrators

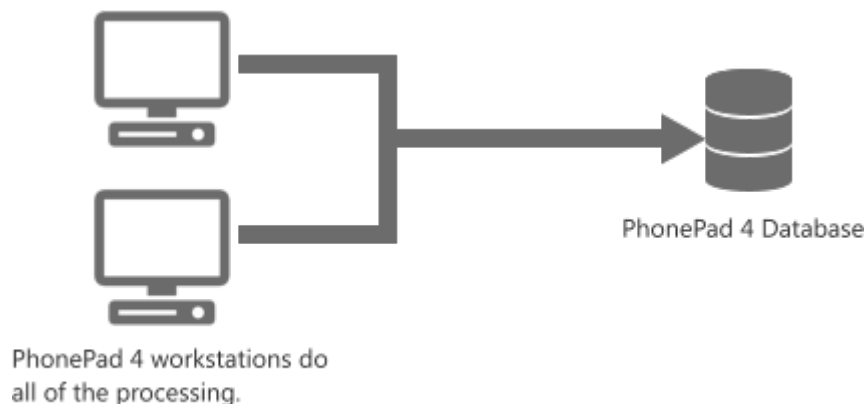
There are many changes in PhonePad 5 that affect PhonePad administrators. Some applications have been removed while others have been replaced with new applications. There are also quite a few new admin features that give you a lot more control.

System Changes

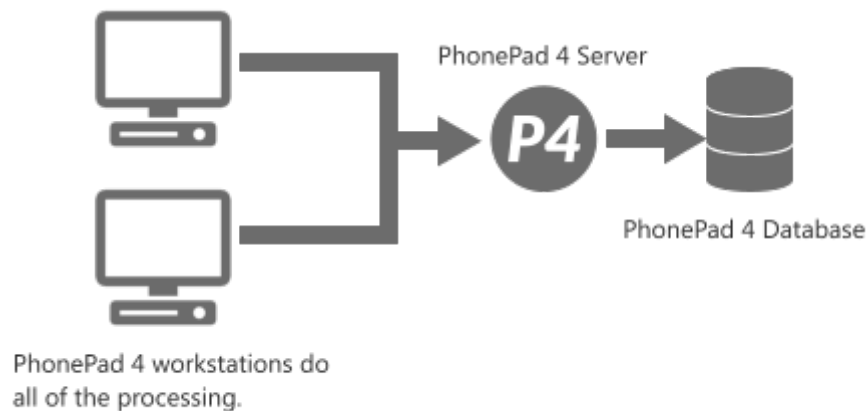
There have been a lot of changes since PhonePad 4. Almost everything has been rewritten to improve usability and performance, and to implement new features.

Everything to do with the database side of things has changed. We have completely replaced the previous database engine with a new high performance engine. That doesn't mean it's a newer version of the previous engine - it's a totally new engine with better performance and greater capacity and capabilities.

In PhonePad 4, the PhonePad 4 Server (DBServer) provided little more than connectivity to the database. It didn't matter whether you were connecting directly to the PhonePad database (Local Mode) or through the PhonePad 4 Server (Remote Mode) - all of the processing was done on the workstations.

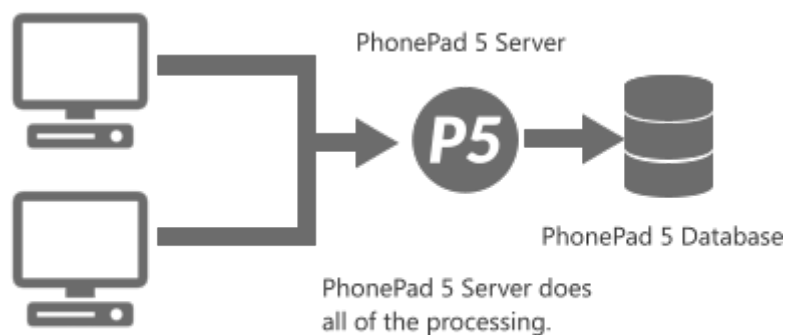


Direct Connection (Local Mode)



Connection through PhonePad 4 Server (Remote Mode)

With PhonePad 5 this has all changed. The PhonePad 5 Server has taken over most of the processing tasks previously done by the workstations.



Connection through PhonePad 5 Server

For example with PhonePad 4, if you sent a message to 15 people the workstation would have to send each of the 15 messages. This could potentially take 15x the amount of time it would take to send a message to 1 person, tying up PhonePad until all messages were sent.

In PhonePad 5, the workstation only sends 1 message. The PhonePad 5 Server takes care of sending the rest of them, freeing up PhonePad on the workstation.

PhonePad 5 Server can perform many automated background tasks 24/7 without users even being aware of them. This was not possible with PhonePad 4.

Application Changes

Let's go through the application changes first.

PhonePad 4	PhonePad 5	Details
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PhonePad4	PhonePad5 PhonePad5Run	<p>PhonePad5Run is the actual PhonePad application but you can't run it directly. You have to run PhonePad5.</p> <p>PhonePad5 is a "loader" program. It is responsible for establishing a connection with the PhonePad 5 Server. It also checks for updates that are required for any of the PhonePad workstation files. If there are updates it will automatically download and install them. Once this has been done it will start PhonePad5Run.</p>
PhonePad Admin (PPAdmin)		One of the first things you will notice is that there is no longer a PhonePad Admin application. All administrator functionality has been incorporated into PhonePad itself.
DBRepair	DatabaseRepair	New repair application specifically for PhonePad 5.
DBBackup		No longer needed.
	DatabaseRestore	A new application for restoring from backups.
ServerManager	ControlCenter	Used to install/uninstall and start/stop the PhonePad 5 Server service.
DBConnect		No longer needed. Connections are now automatic.
DBUpdate		No longer needed. The PhonePad 5 Server takes care of any database changes.
DBServer	PhonePad5Server	Brand new server application with powerful new database engine and automatic network discovery features.
License		Now built-in to PhonePad 5.
Shortcuts		No longer needed.
SupportCenter		No longer needed.
WhereRU 4	WhereRU 5	Updated for PhonePad 5.
	InstantChat	A new application in PhonePad 5.

AutoBackup		Built-in to PhonePad 5 Server.
MessageSender 5	MessageSender 6	Updated for PhonePad 5. Available separately.

New Features

Now we'll take a look at some of the new admin features. There are now two types of administrators: Managers and System Administrators. The following table shows which admin features are available to the two admin types.

Feature	Description	Manager	System Admin
User Management	Users are now managed from within PhonePad. Set Address Book permissions, view user logs.	★	★
Manage Groups	Messages can be sent to groups, groups can have their own folders for storing messages.	★	★
Label Editor	Extended range of labels that can be customized.	★	★
Manage Lookup Lists	There are special look up lists for messages and contacts.	★	★
Message Archives	Access archived messages.	★	★
Archive Messages	Archive messages.	★	★
Overview	Shows an overview of all message statuses.	★	★
Master View	Shows all messages in all users' Inboxes including their current status.	★	★
Reports	New reports give you a better idea of what's happening with messages.	★	★

Automatic Backup	Your PhonePad database is now backed up automatically every day. You can change the schedule if required.		
Backup	Manual backup facility built-in to PhonePad.		
Backup Logs	Displays a history of all backups, both manual and automatic.		
Repair	Do manual repairs or schedule a repair for a specific time.		
System Rules	Many user preferences have been moved to the new System Rules feature which allows administrators to define system wide options.		
Communication Settings	Set up all of your communication settings (email, SMS and Pushover) in one place. Used for notifications and MessageSender 6.		
Notifications	Administrators can receive notifications via email, SMS or Pushover when backups or repair have been successfully completed, or failed. Users can receive their login details when they have forgotten their password.		
View Server Logs			
Logout Users	Force users out when you need to do some system maintenance.		
Application Updates	Administrators can check for PhonePad 5 updates and download them from within PhonePad. Workstations can be automatically updated by the PhonePad 5 Server.		

Connection Modes

PhonePad 4 had two Connection Modes: **Local Mode** (direct file access) and **Remote Mode** (Client/Server). The aim was to provide maximum flexibility in configuring PhonePad 4 on networks, however, with that flexibility came some complexity as well.

Using *Local Mode*, PhonePad on each workstation connected directly to the PhonePad database located on a network drive on a Server, or a shared drive on a Host PC.

This method had some drawbacks, including:

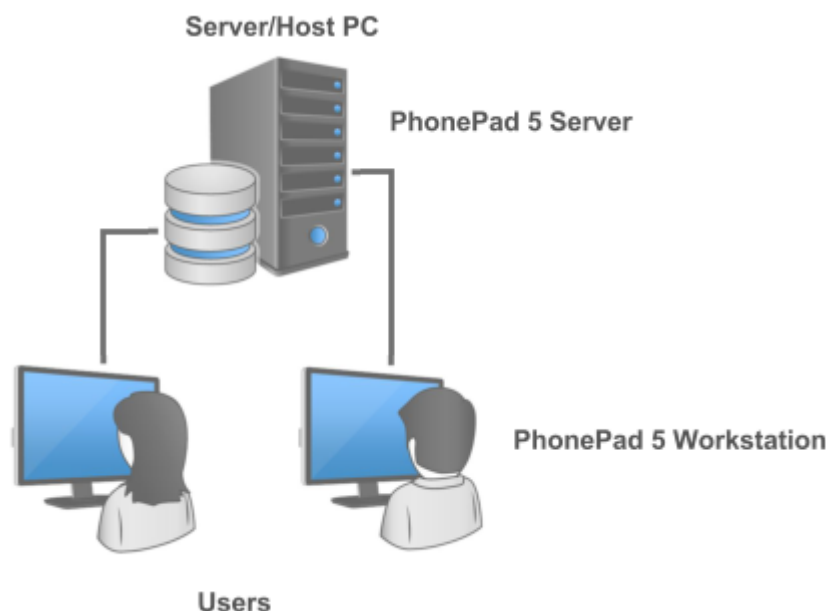
- The database was sometimes susceptible to corruption from a variety of causes: workstations crashing, anti-virus software, intermittent faults with network cables, network interface cards, network hardware, etc.
- Windows permission issues.
- Setting up the connection to the database was confusing for many users.
- Performance bottlenecks with the Windows file system.

With *Remote Mode* PhonePad connected to the PhonePad Server application located on a Server or Host PC. One of the advantages was that no workstation had direct access to the PhonePad database, only DBServer did. This reduced the chances of data corruption while at the same time increasing performance.

However, setting up the connection to the server on each workstation was also problematic for many users. Additionally, Windows on Host PCs had a habit of changing their IP Address, breaking the connection.

This has all changed with PhonePad 5.

There is only one connection mode: *Client/Server* (or *Remote Mode*). This simplifies things greatly as users no longer have to worry about Windows permissions, setting up network shares, and so on.



In fact, there is no need for users to set up the connection at all. We have worked hard to make things as easy as possible with PhonePad 5. The result is that PhonePad 5 automatically connects to the PhonePad 5 Server without any action required by users. It even adds an exception rule to your Server's or Host PC's Windows Firewall to allow connections between workstations and the Server or Host PC.

Each time PhonePad starts on the workstation it searches for any PhonePad 5 servers on the network. When the server receives this request it sends out its connection information. PhonePad then uses this information to establish a connection with the server. The advantages of this method are:

- There is no configuration required on workstations.
- If the Server or Host PC's IP Address changes, workstations can still connect as they will always have the latest server connection information.

There is one disadvantage though: if you had installed PhonePad 4 *on a network drive* you will no longer be able to do this with PhonePad 5. The PhonePad 5 Server must be installed on a local drive of a Server or Host PC, and so does the PhonePad database. You can still install PhonePad 5 Workstation on a network drive if you wish although we believe you will get better performance installing it directly on a workstation.

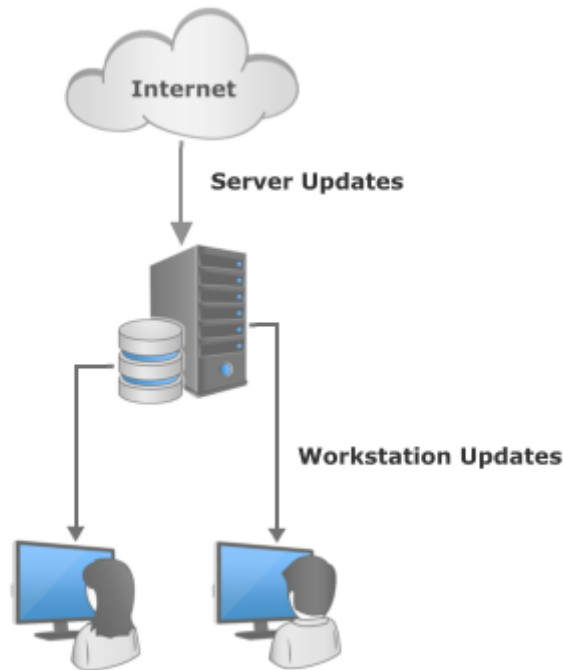
Updating PhonePad

Updating PhonePad 4 on each workstation (if you weren't using a network drive) could sometimes be a chore.

Many large organizations installed PhonePad 4 on each workstation and set it up to connect to their servers in Remote Mode. This improved performance dramatically and minimized data corruption.

Some of these organizations have hundreds of PhonePad users so when an update came out it was a major headache to deploy it to all users. Unless they had special network application deployment tools, someone would have to go around to each workstation and physically install the new version of PhonePad 4.

We felt their pain. So we changed it.



Initially PhonePad 5 **will** require someone to walk around and install it on each workstation, but it's a **one-time** task. After that, PhonePad 5 Server will automatically update all workstations with the latest version when instructed to by a PhonePad system admin. The sales of aspirin may go down but the result will be happier administrators and users.

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Chapter

2

Installing PhonePad 5

Installing PhonePad 5

PhonePad 5 has two installers: one for your Server or Host PC, and another for your workstations. It's important that you download and run both installers on your Server or Host PC, but only download and install the workstation installer on your workstations.

System Requirements and Specifications

System Requirements

PhonePad 5 will run on virtually any Windows-based network. If your computers are interconnected in some way then PhonePad should run fine.

- **Server*:** Microsoft Windows Server 2000, 2003, 2008, 2012 or higher.
or
- **Host PC*:** Microsoft Windows 7, 8, 10 or higher (32 bit or 64 bit).
- **Workstations:** Microsoft Windows XP, Vista, 7, 8, 10 or higher (32 bit or 64 bit).
- Wide Area Network (WAN), Local Area Network (LAN) or Peer-to-Peer Network.
- Server or Host PC: 210MB Hard Disk space plus additional space for database.
- Workstation: 110MB Hard Disk space.
- Memory Usage: 30MB RAM approximately.

* You can use either a Server or a Host PC, but you don't need both.

Specifications

- Workstations connect with the PhonePad 5 Server via TCP on port 12600.
- The internal notification messaging and broadcast system uses TCP port 12601.
- The Caller ID service uses UDP on port 3520 and 12605.
- The Auto-Discovery System uses UDP on port 15350.
- Embedded internal, self-managed, zero-configuration SQL database engine.
- Message storage capacity: over 1 billion messages.

PhonePad Port Usage

Program	80	3520	12600	12601	12602	12603	12604	12605	15350
PhonePad5.exe	●		●						●
PhonePad5Remote.exe	●		●						
PhonePad5Run.exe	●		●	○	○			⊙	
PhonePad5Server.exe	●		●						●
AppointmentCalendar.exe	●		●	○	○				
CallerIDService.exe		⊙	●					□	
ControlCenter.exe	●		●						
Dashboard.exe			●						
InstantChat.exe			●						
MessageAlert.exe			●						
MessageSender6.exe			●						
WhereRU.exe			●						
WorkStationNotificationService.exe			●	○					

- Bi-Directional (Workstation and/or Server).
- ⊙ Inbound Only.
- Outbound Only.
- Local Port on Workstation only (Bi-Directional).

Notes

Port 80 is used for occasional communications between applications and backend services on our web server.

Port 3520 is used by CallerID.com devices (if you have one).

Port 12600 is the data communications port and is used for all communication between applications and your PhonePad Server.

Port 12601 is used by the notification service to notify PhonePad and Appointment Calendar of internal updates.

Port 12602 is used for inter-process communication between PhonePad and Appointment Calendar.

Port 12605 is used to receive Caller ID communications from [CallerID.com](https://www.callerid.com) devices.

Port 15350 is the server auto-discovery port used by our Aloha protocol.

Ports marked local are only used locally on the machine, ie. they are not used across your network.

Installing PhonePad 5 Server

The PhonePad 5 Server application installs as a Windows service. It can be installed on either a Server or a Host PC.

Download PhonePad 5 Server Setup

Download the PhonePad 5 Server installer (phonepad5serversetup.exe) from the download page of the Cybercom Software website.

Anti-Virus Software

If your anti-virus software has a real-time scanning feature it is strongly recommended that you disable it on your Server or Host PC.

Please read the Anti-Virus, Anti-Spyware and Other Security Software section.

Installing PhonePad on a Server

Installation

Follow these steps to install the PhonePad 5 Server:

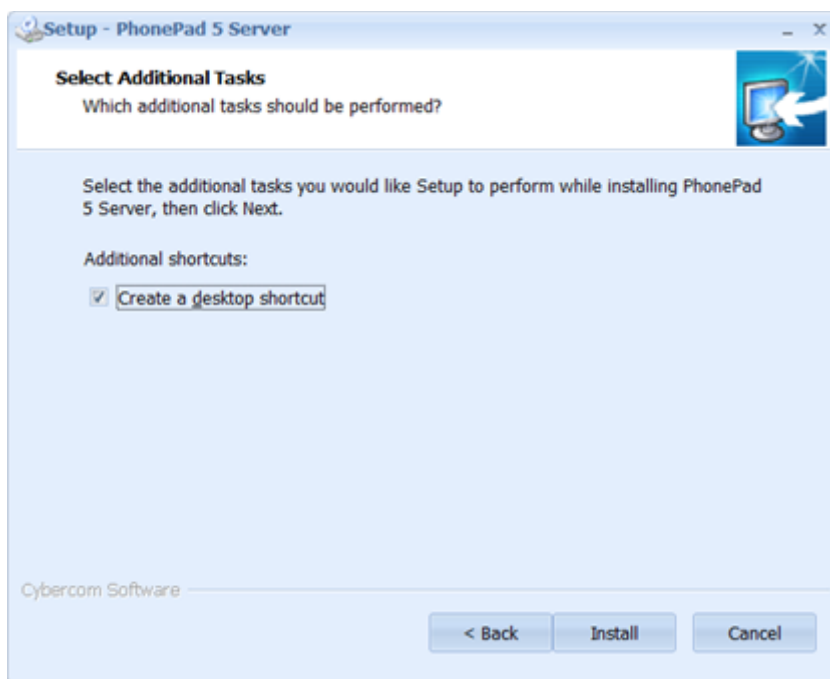
1. Run the installer (phonepad5serversetup.exe).
2. When the Welcome screen appears, click **Next** to continue.



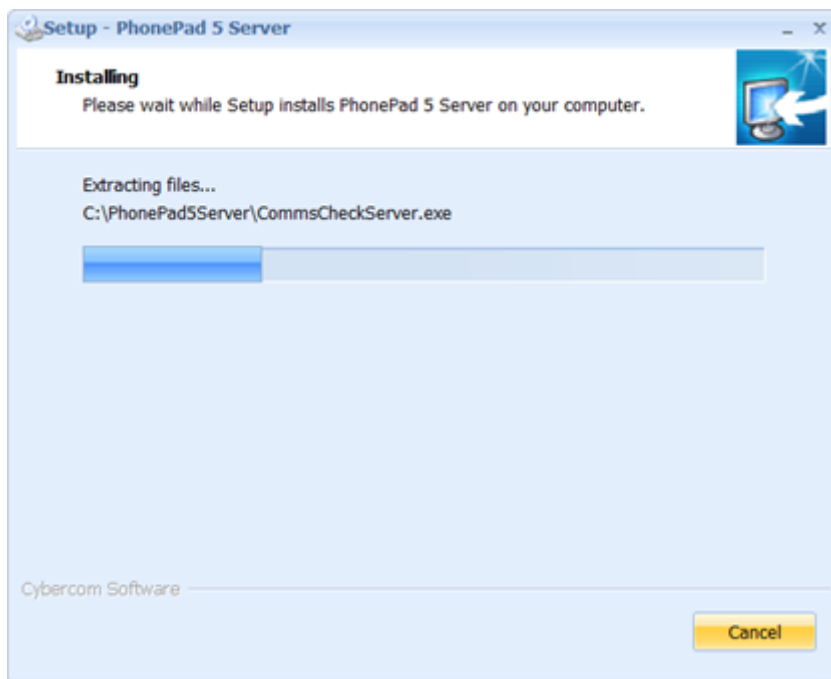
3. Read the **End User License Agreement**. Select **I accept the agreement** and then click **Next**.



4. The installer will create shortcuts on your desktop. If you don't want the shortcuts then uncheck the **Create a desktop shortcut** check box.
5. Click the **Install** button to begin installation.



6. PhonePad 5 Server will now install. It should only take a few seconds.



7. Once the install has finished, a program called **Setup Service** will automatically start.



8. It will automatically install and start the PhonePad 5 Server service.
9. If you get an errors please try running **ServiceSetup** again (it's located in the PhonePad 5 Server folder).



Setup Service will automatically add the necessary inbound and outbound exception rules to the Windows Firewall on the Server or Host PC so that PhonePad 5 on your workstations can connect to and communicate with the PhonePad 5 Server on your Server or Host PC.

Installing PhonePad on a Host PC

If you don't have a Server you can use one of your computers to act like a server, while still being used as a workstation. We call this a Host PC.

When selecting a computer to be a Host PC we recommend not selecting a computer that has a heavy workload. If it normally does a lot of number crunching or graphics processing, it may slow down PhonePad for all of your users. The best option is to choose the fastest computer you have with the least amount of workload.

Although the Host PC doesn't have to be logged in when users want to use PhonePad, it does need to be turned on. For automatic backups and other automated functions to work it is ideal to always leave the Host PC turned on.

PhonePad 5 Server must be installed on a local drive of the Host PC. Do **not** install it on an external drive like a USB drive or a NAS drive otherwise you will have problems.

Installation

Follow these steps to install the PhonePad 5 Server:

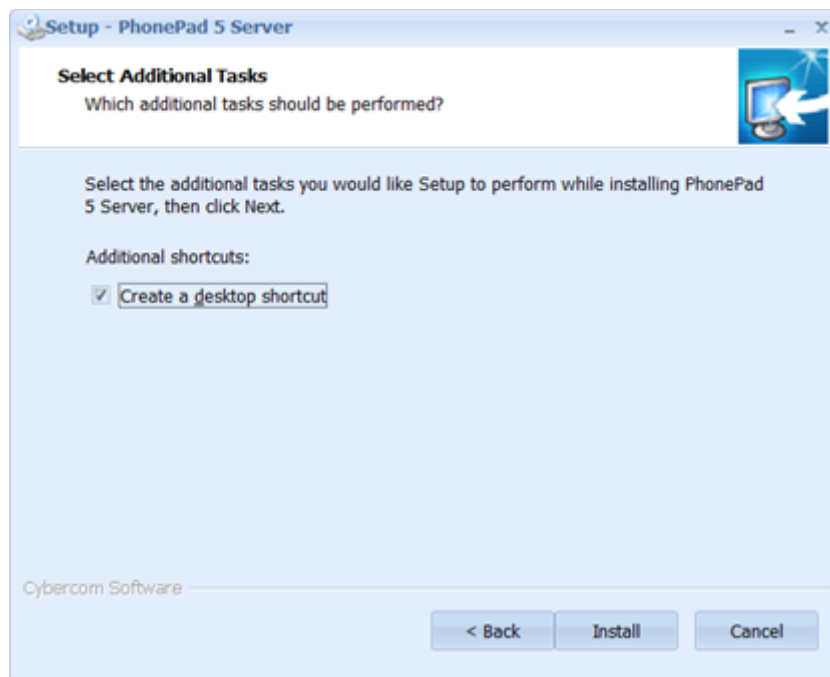
1. Run the installer (phonepad5serversetup.exe).
2. When the Welcome screen appears, click **Next** to continue.



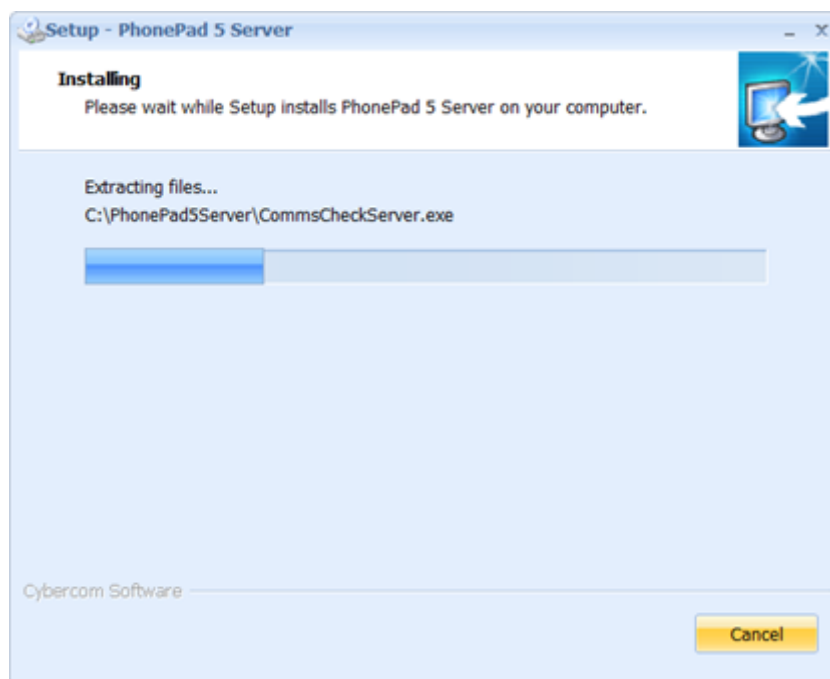
3. Read the **End User License Agreement**. Select **I accept the agreement** and then click **Next**.



4. The installer will create shortcuts on your desktop. If you don't want the shortcuts then uncheck the **Create a desktop shortcut** check box.
5. Click the **Install** button to begin installation.



6. PhonePad 5 Server will now install. It should only take a few seconds.



7. Once the install has finished, a program called **Setup Service** will automatically start.



8. It will automatically install and start the PhonePad 5 Server service.
9. If you get an errors please try running **ServiceSetup** again (it's located in the PhonePad 5 Server folder).



Setup Service will automatically add an exception rule to your Windows Firewall so that PhonePad 5 on your workstations can connect to the PhonePad 5 Server on your Server or Host PC.

PhonePad 5 Workstation

PhonePad 5 Workstation is not installed as part of the PhonePad 5 Server installation, so you will need to install it separately on your Server or Host PC.

Installing PhonePad 5 Workstation on My Server or Host PC

Host PCs

If you are installing PhonePad 5 Server on a workstation then you can continue to use that computer as you would any other workstation. PhonePad 5 Server will run in the background as a Windows Service. You will need to also install PhonePad 5 Workstation on this computer.

Even if you choose to make the Host PC a dedicated machine that isn't used as a standard workstation, it is recommended that you install PhonePad 5 Workstation. There are a couple of reasons for this:

- The **Application Update** feature can only be run from a Server or Host PC.
- If PhonePad 5 isn't working on any workstations, you can run it on your Host PC to verify whether or not it's a problem with PhonePad 5 Server.

Servers

The reasons why it's a good idea to install PhonePad 5 Workstation on your server is the same as for a Host PC:

- The **Application Update** feature can only be run from a Server or Host PC.
- If PhonePad 5 isn't working on any workstations, you can run it on your Host PC to verify whether or not it's a problem with PhonePad 5 Server.

What is a Host PC?

We often mention the term "Host PC". So what is a Host PC?

It is a standard Windows computer running a standard version of Windows. We call it a Host PC because it *hosts* the PhonePad 5 Server and your PhonePad 5 database. Your workstations running PhonePad 5 Workstation connect to this computer.

The Host PC *acts* like a server but it is not a true server. A true server would be running a version of Windows Server Edition. A Host PC works like a server but doesn't need the special edition of Windows. It works with your normal version of Windows. You can also use a Host PC as a normal workstation while it's being used as a host.

Host PCs are typically used on Peer-to-Peer networks (networks that don't have a centralized server), although there's no reason why you couldn't use a Host PC on a Local Area Network (a network that *does* have a server).

If you're going to use a workstation as a Host PC please don't pick the slowest computer you have. We often see old computers running Windows XP used as Host PCs while all the other machines are fast computers running Windows 10. The Host PC will have multiple users connecting to it simultaneously so the computer needs to be able to handle the load.

Here's what we consider to be important criteria for a Host PC:

- It needs to be reasonably fast. If possible, choose the fastest computer you have on your network.
- Don't select an overworked computer to be the Host PC. If it does heavy processing or number crunching then response times from PhonePad 5 Server will be affected.
- The computer needs to be switched on most, if not all, of the time. If the Host PC is off then users won't be able to connect. Also, automated database tasks like backups won't be performed.

Installing PhonePad 5 Workstation

The PhonePad 5 workstation application should be installed on each workstation. It is also recommended that you install it on your Server or Host PC.

Download PhonePad 5 Workstation Setup

Download the PhonePad 5 Workstation installer (phonepad5workstationsetup.exe) from the download page of the Cybercom Software website.

Installing PhonePad 5 on a Workstation

Follow these steps to install the PhonePad 5 Workstation:

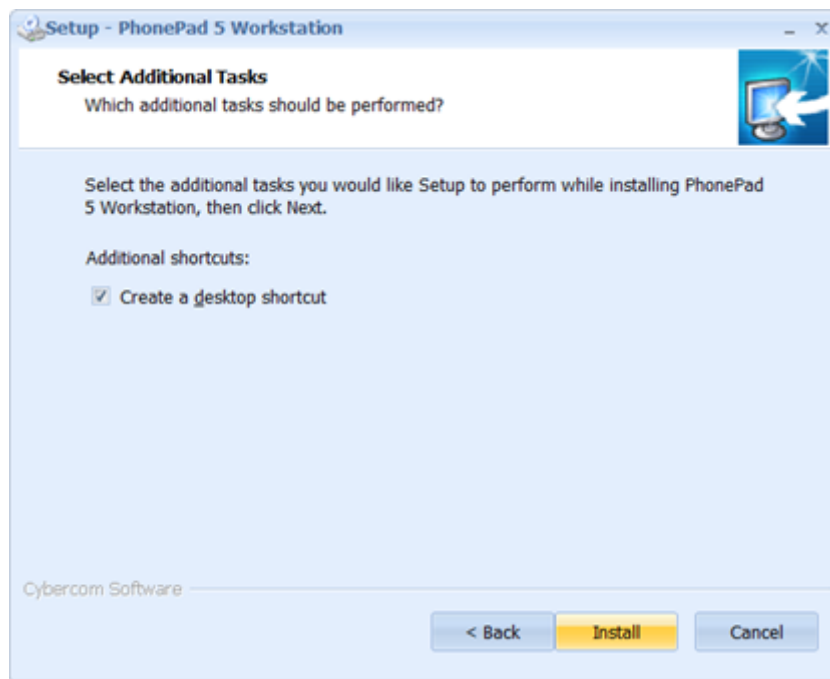
1. Run the installer (phonepad5workstationsetup.exe).
2. When the Welcome screen appears, click **Next** to continue.



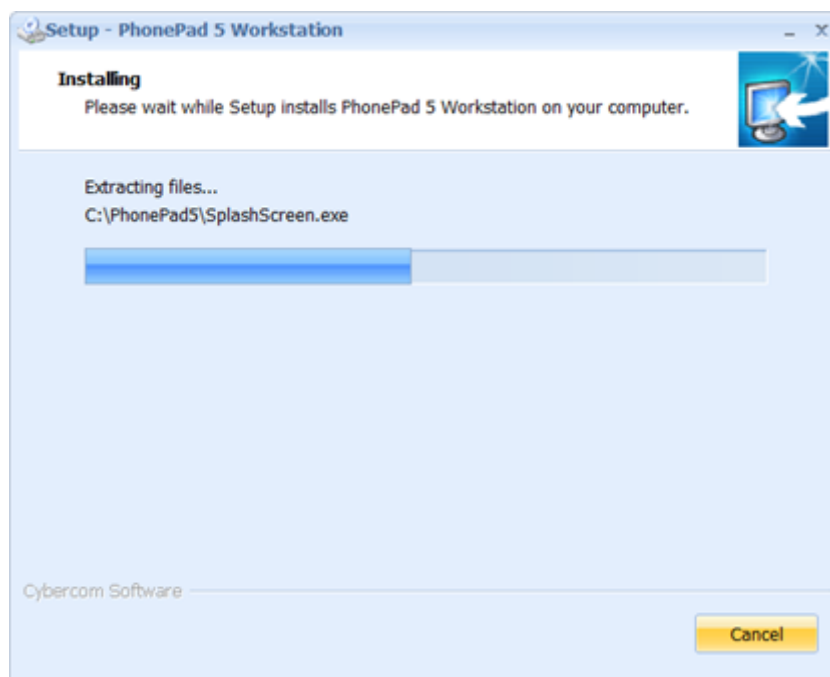
3. Read the **End User License Agreement**. Select **I accept the agreement** and then click **Next**.



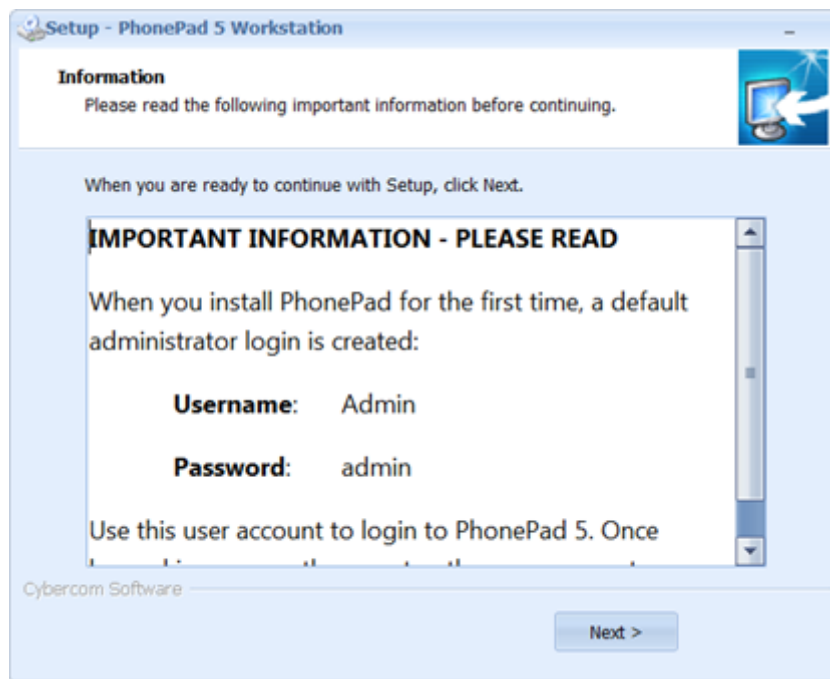
4. The installer will create shortcuts on your desktop. If you don't want the shortcuts then uncheck the **Create a desktop shortcut** check box.
5. Click the **Install** button to begin installation.



6. PhonePad 5 Workstation will now install. It should only take a few seconds.



7. Once the install has finished, information about the default administrator user account will be displayed. You will need this information to login to PhonePad so that you can create some user accounts. Click **Next** to continue.



8. Click **Finish** to complete the install.



9. PhonePad 5 should start automatically.



The great news with PhonePad 5 is that you will only need to install it on each workstation once.

When new versions of PhonePad are installed on the Server or Host PC, each workstation will be automatically updated with the new version.

Setting a Startup Delay

If you have PhonePad 5 Workstation set up to start when Windows starts, you will get connection errors if your network card is still initializing. Network connections can take a little while to start, especially wireless connections.

To compensate for this you can get PhonePad to wait for a network connection to become available when it starts.

To set this up:

1. Run **Workstation Config** on the workstation.
- 2.
3. Select the **Settings** tab.
- 4.
5. Check the **Wait for Network Connection on Startup** check box.
- 6.
7. Click the Save button.

Data Migration

If you are upgrading from PhonePad 4, you can transfer your data over to PhonePad 5 using the data migration wizard. The program is located in your PhonePad 5 Server folder, which by default is installed under *C:\Program Files (x86)\PhonePad5Server* (or sometimes *C:\PhonePad5Server*).

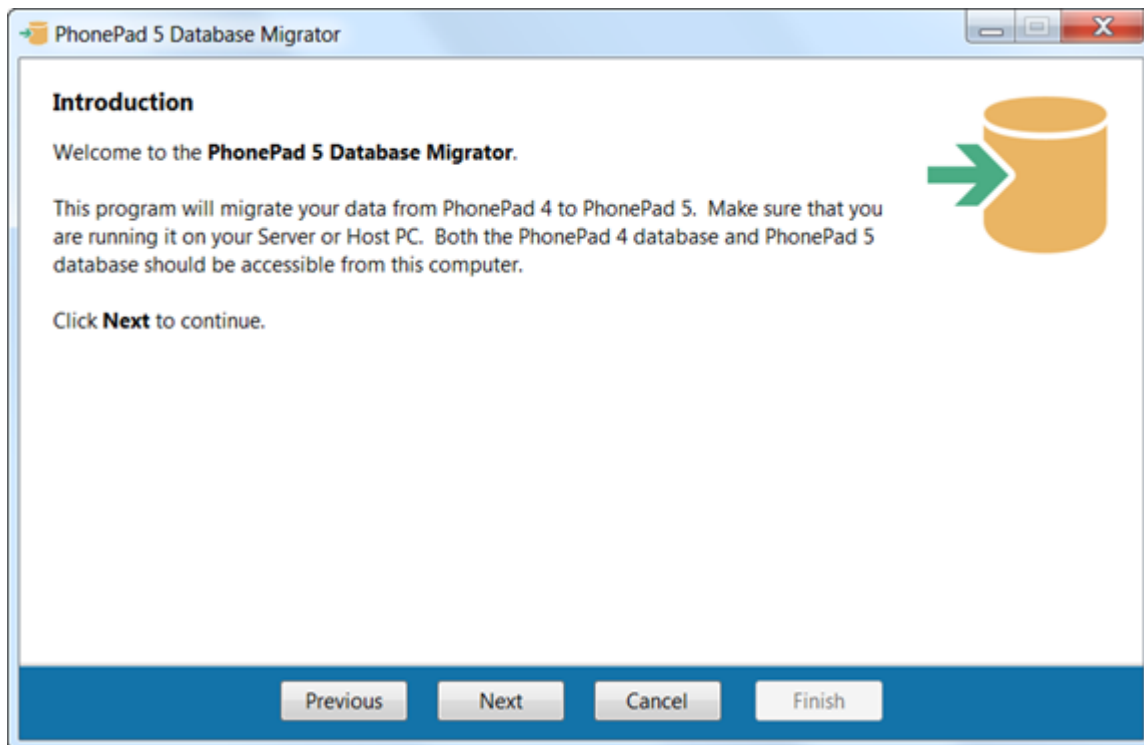
Preparing for Data Migration

Data migration needs to be performed on your Server or Host PC. You will need to be able to access your PhonePad 4 database from this machine.

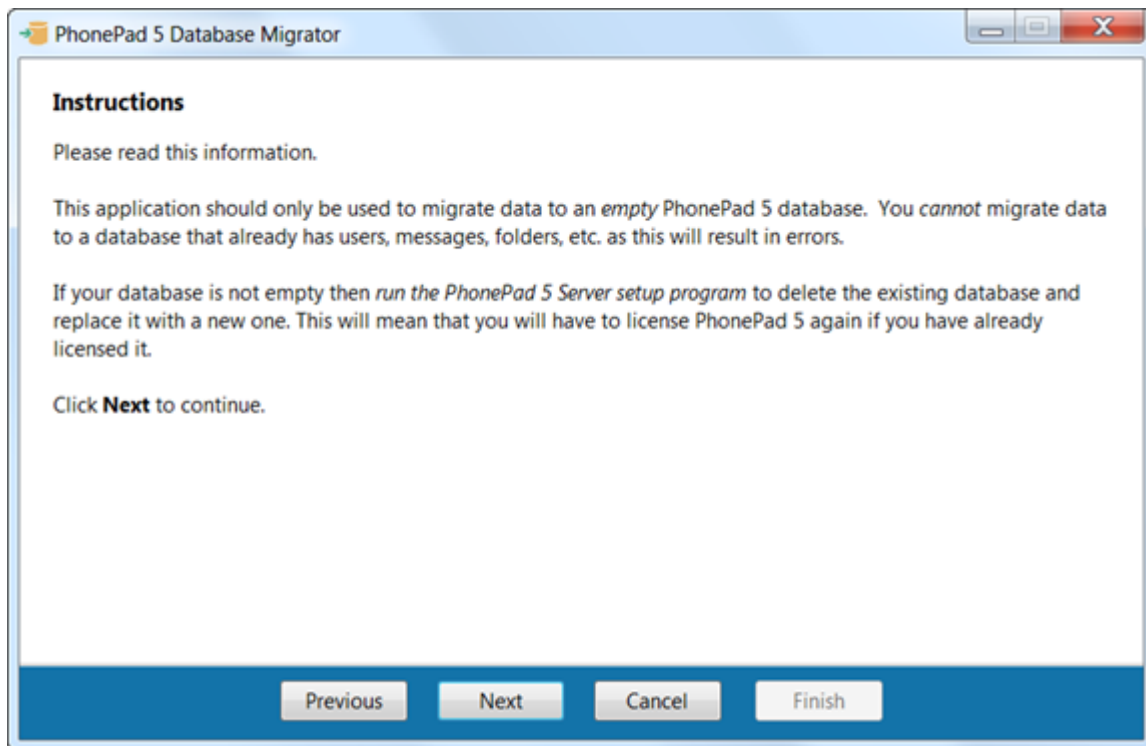
PhonePad 5 will not accept usernames containing spaces, double-quotes (") or periods (.) so you will need to rename some of your usernames if they contain any of these characters.

Migrating Your Data

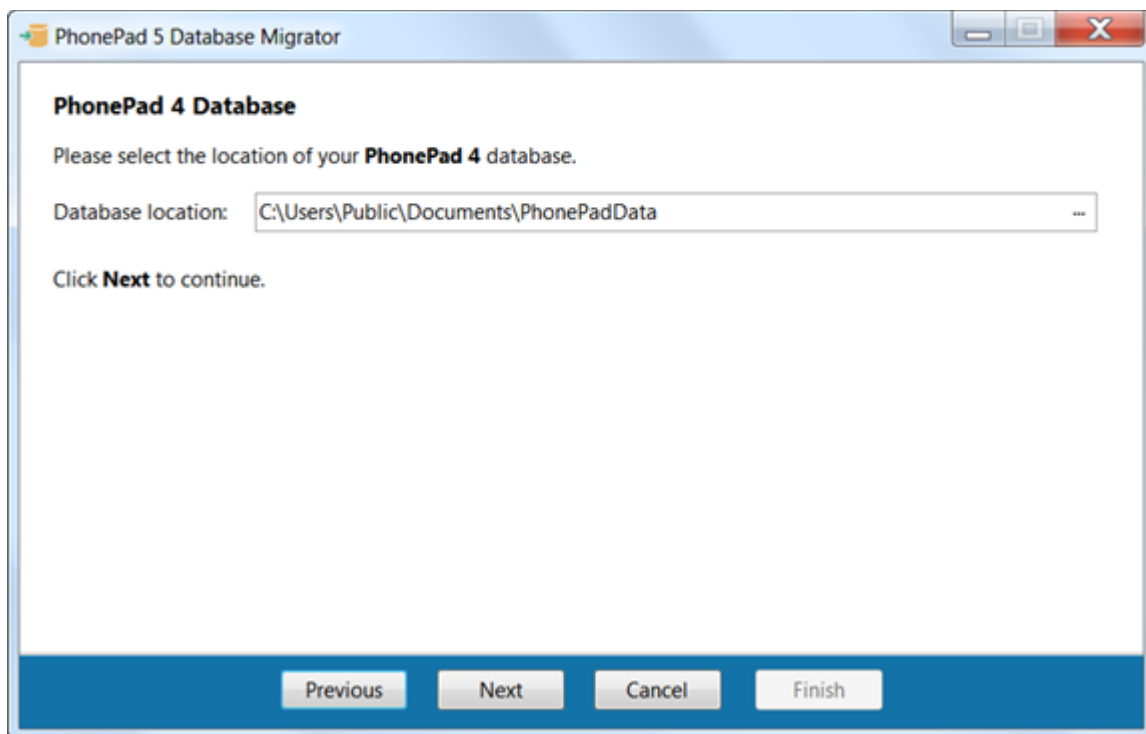
1. Run **DatabaseMigrator.exe**.
2. The **Introduction** screen will be displayed. Click **Next** to continue.



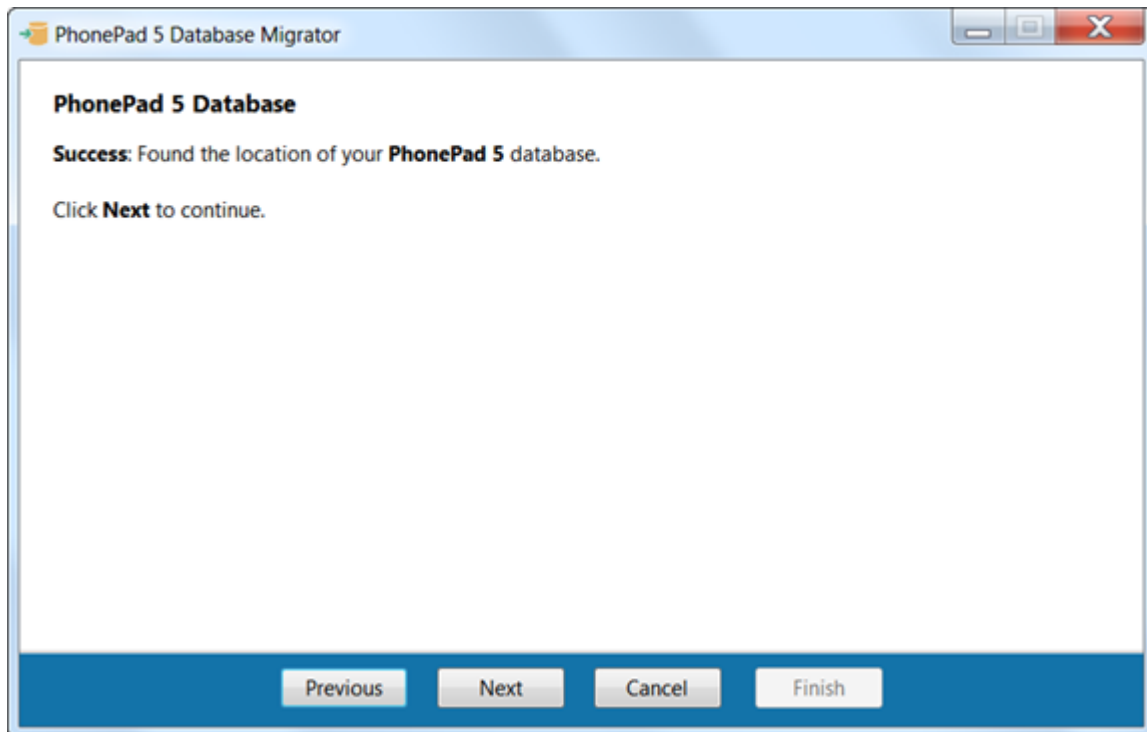
3. Read the **Instructions** on this screen. As the instructions state, you can only migrate your data over from PhonePad 4 **if the PhonePad 5 database is completely empty**. This to avoid any conflicts with the data that could result from combining new data with imported data. Click **Next** to continue.



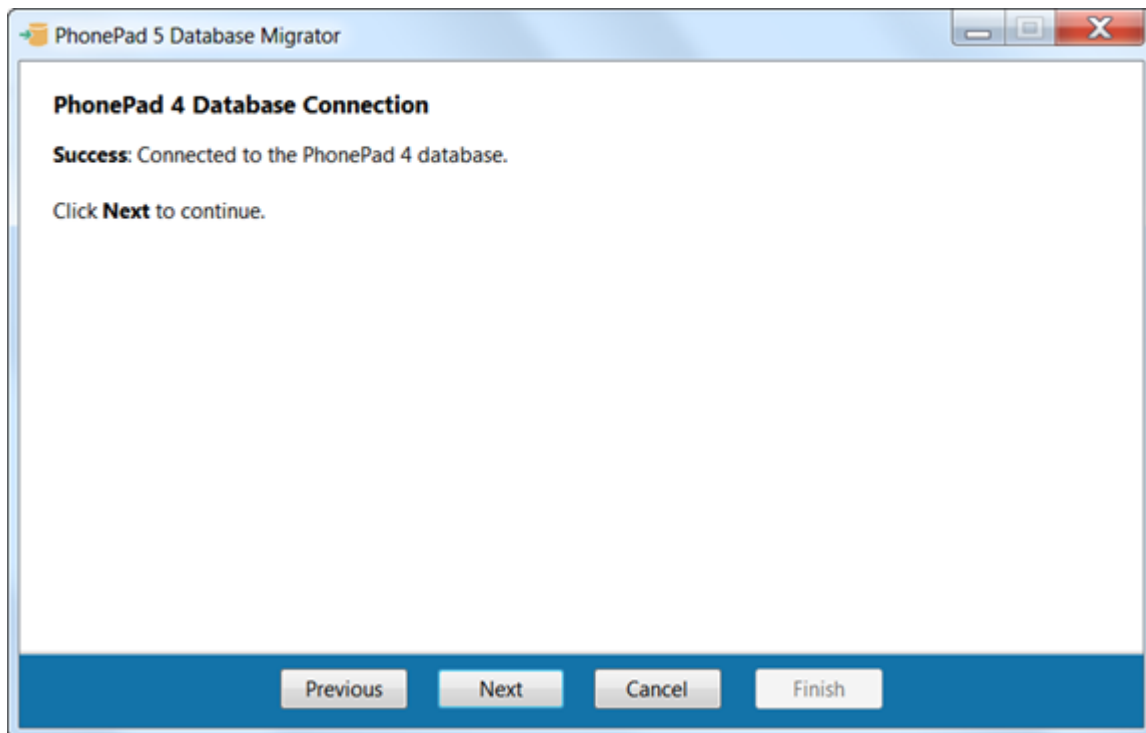
4. You will need to select the location of your PhonePad data folder.



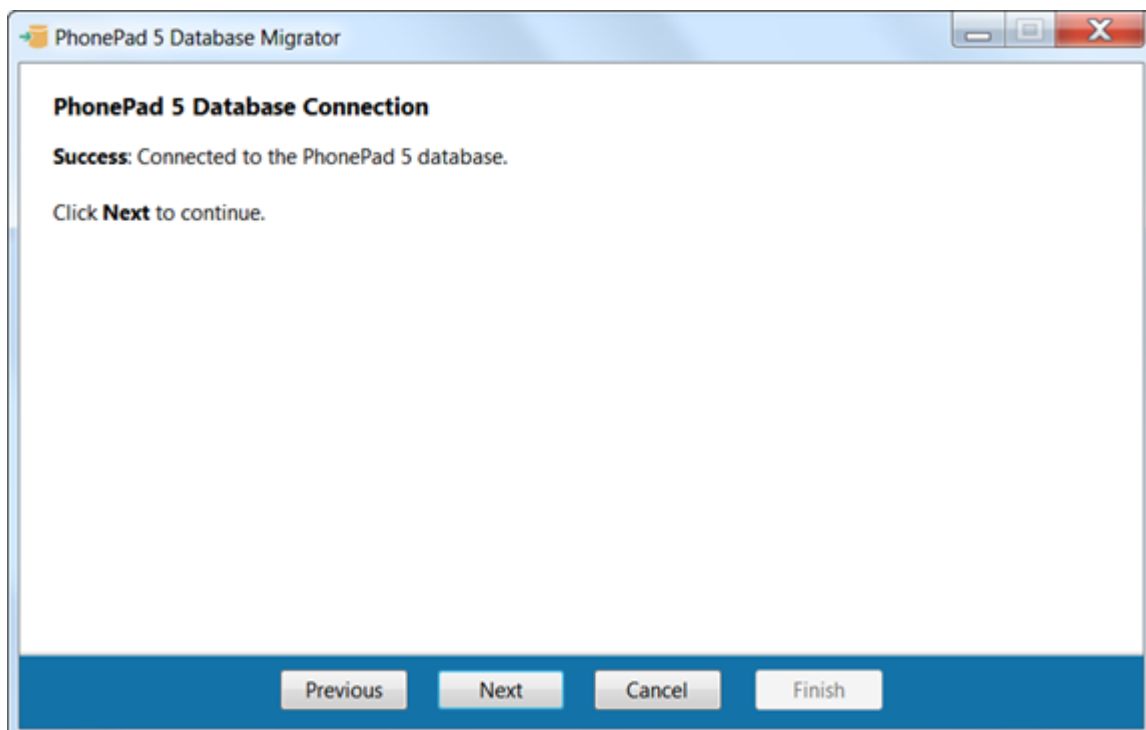
5. Click **Next**. The wizard will check the location you specified. If it can't find your PhonePad 4 database in that location it will show an error message.
6. When the following screen appears, the wizard will attempt to locate your PhonePad 5 database. If it is unable to locate your PhonePad 5 database it will show an error message. Click **Next** to continue.



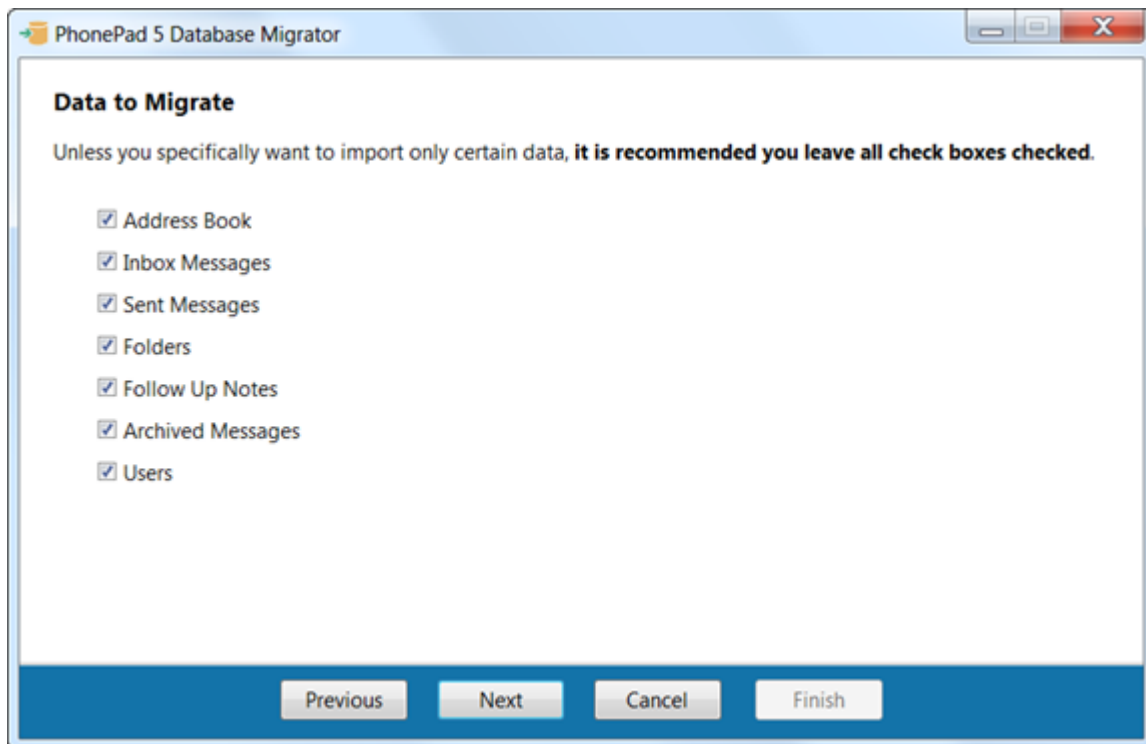
7. The wizard will attempt to connect to your PhonePad 4 database. If all goes well you should see a success message on this screen. Click **Next** to continue.



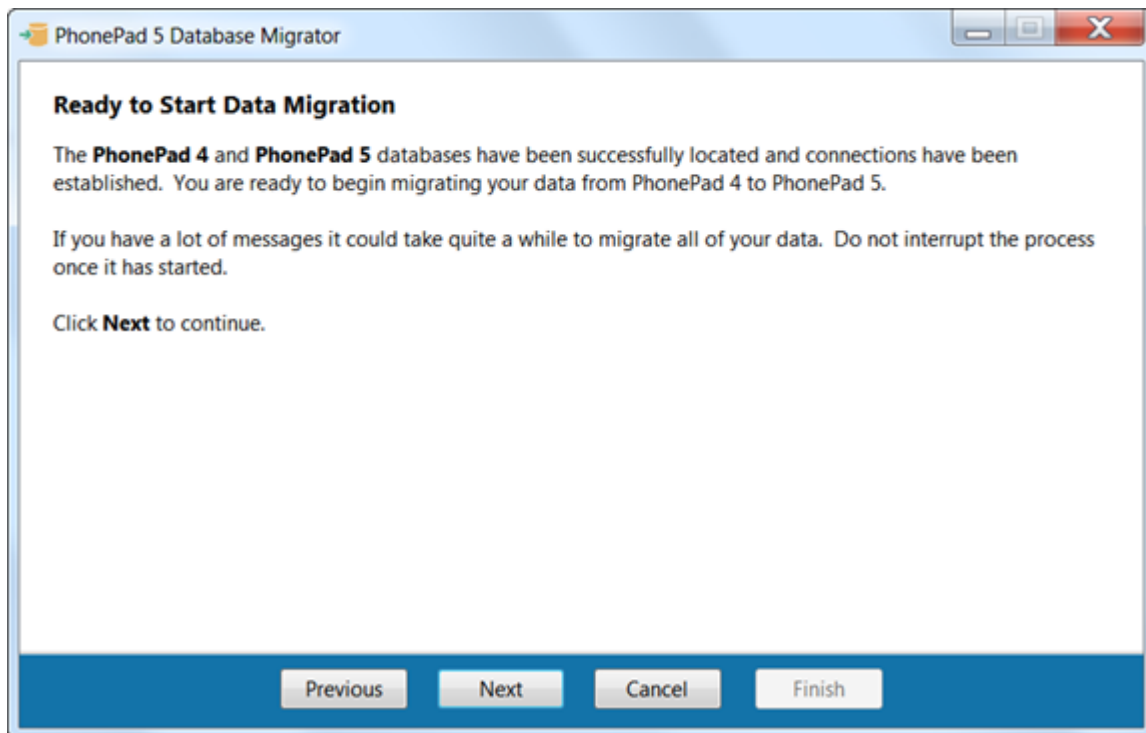
8. The wizard will then attempt to connect to your PhonePad 5 database. If everything is ok you should see a screen like the one below. Click **Next** to continue.



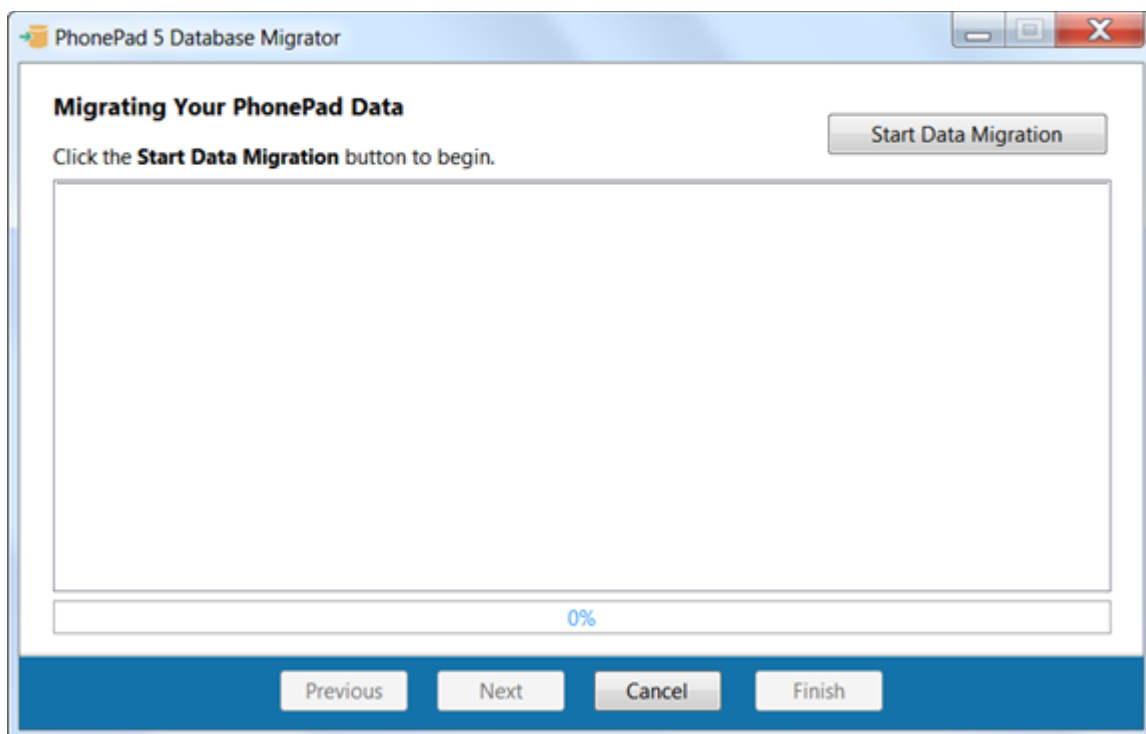
9. This screen allows you to select which data will be migrated to PhonePad 5. You should leave all check boxes checked unless you definitely don't want some data migrated. Click **Next** to continue.



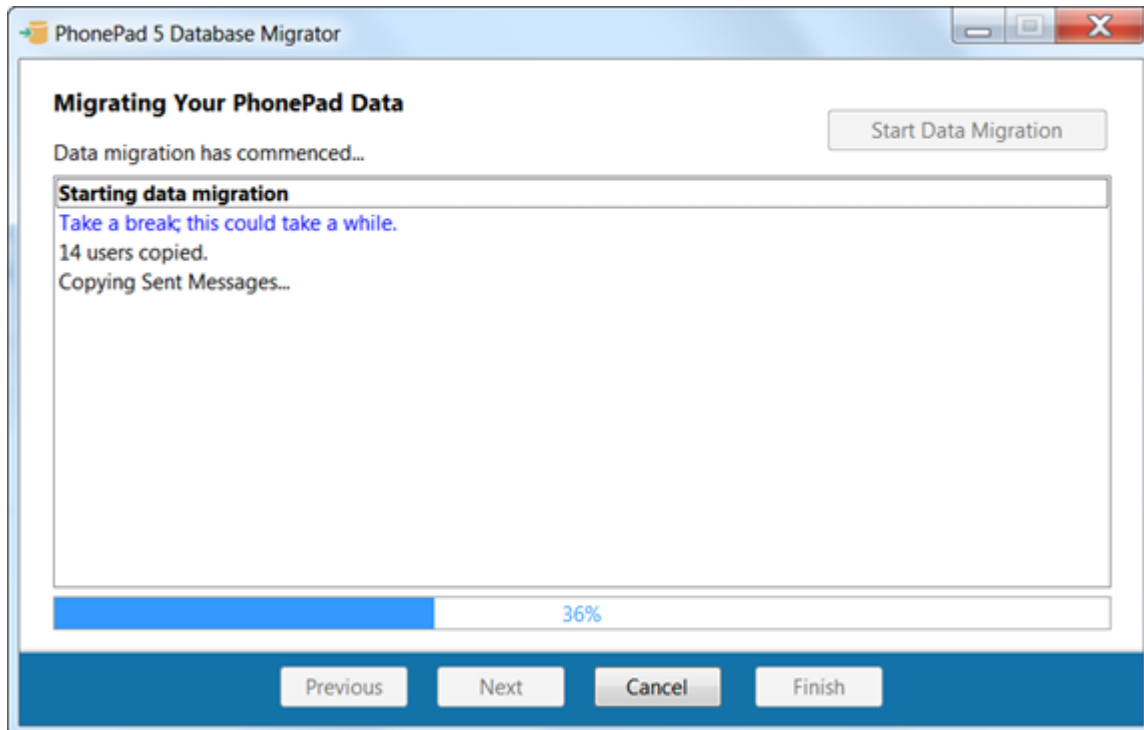
10. Things are looking good if you see this screen. All checks have been successful and the wizard is ready to go. Be aware that this could take a while if you have a lot of messages and/or contacts in PhonePad 4. Click **Next** to continue.



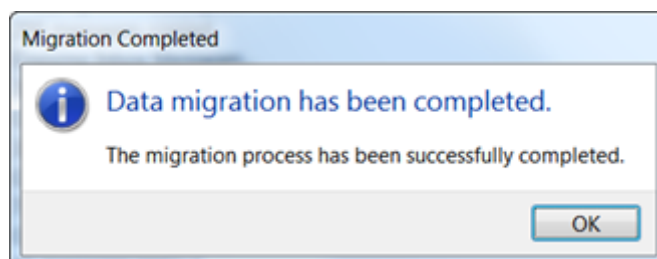
11. Let's kick it off. Click the **Start Data Migration** button to begin.



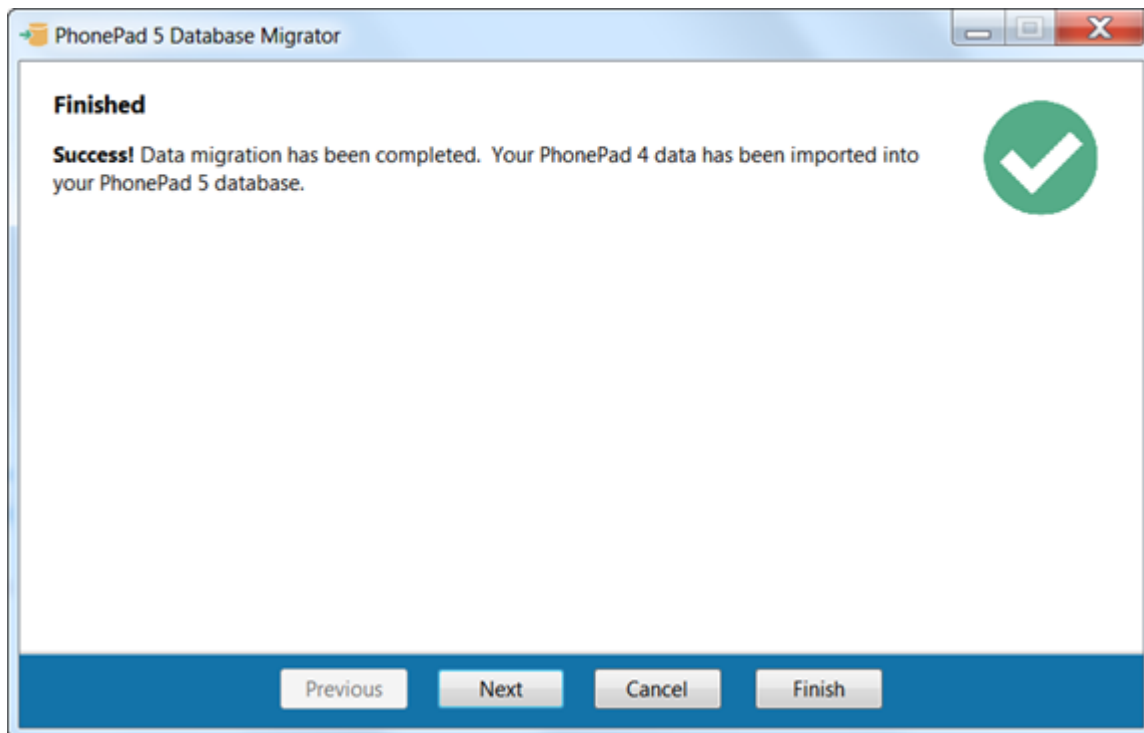
12. We're off and the transfer of data is in motion. Do not interrupt this process or you will have to re-create your PhonePad 5 database by reinstalling your PhonePad 5 Server.



13. Hopefully all goes well and you eventually get this message:



14. Click the **OK** button, then click **Next** to continue.



15. All of your PhonePad 4 data should now be in PhonePad 5. Click **Finish** to close the wizard.

So let's review what just happened:

- New user accounts were created in PhonePad 5 based on the usernames and passwords from PhonePad 4. Any users that had administrator rights will have system administrator rights in PhonePad 5.
- All messages were transferred.
- All follow up notes were migrated.
- All folders, both public and personal were migrated.
- All archived messages and follow up notes were migrated.
- All Address Book contacts were transferred.

What wasn't transferred:

- Deleted messages were not transferred.
- Any messages in the message queue for Automatic Message Forwarding (using MessageSender) were not transferred.

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Chapter



3

Getting Started

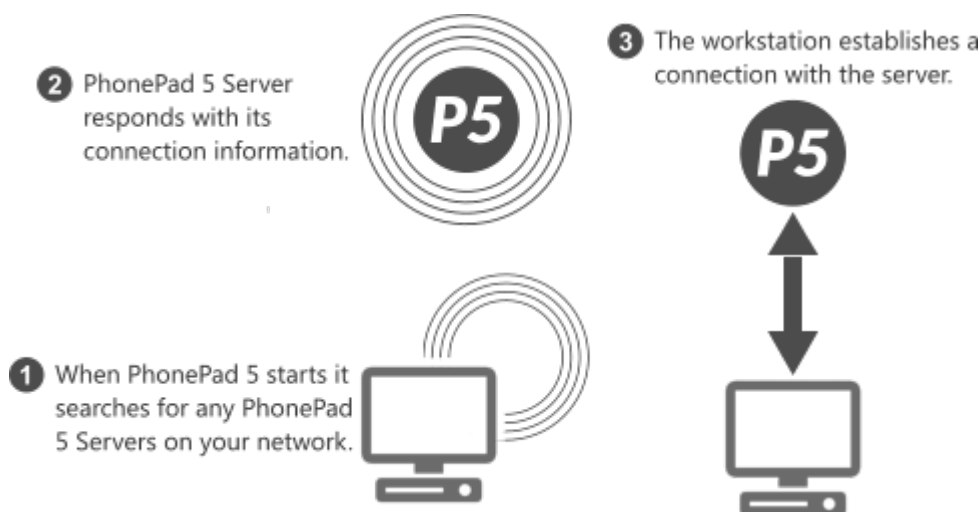
Getting Started

Follow the steps in this chapter to get PhonePad 5 up and running.

Setting Up the Connection to the Server

You may be pleased to know that once you have installed PhonePad 5 on your workstations there is nothing else you need to do. You don't need to configure PhonePad to connect to the Server or Host PC.

When PhonePad starts up it will try to auto-discover any PhonePad 5 Servers on your network. Your workstations will automatically establish a connection with the server once it finds it.



If PhonePad is unable to connect to the PhonePad 5 Server then it will be due to one of the following reasons:

- The PhonePad 5 Server Windows service has not been installed or is not running.
- A router, bridge, or brouter (bridge router) on your network may be blocking UDP broadcasts and or TCP/IP connections.
- A firewall, and/or security software, on the Server or Host PC, or on the workstation is blocking the connection. You may need to configure it to allow the connection.

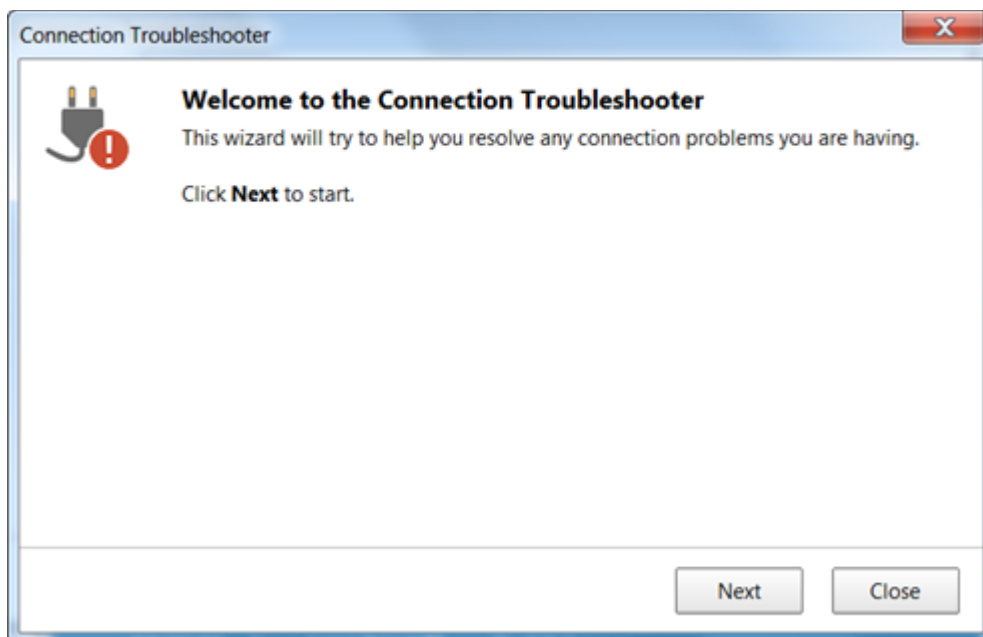
When you use Control Center to install and start the PhonePad 5 Server it will automatically add an exception rule to the Windows Firewall so that PhonePad 5 Workstation can connect to the Server or Host PC. If you have 3rd party anti-virus and/or firewall software installed it may not be enough to unblock the connections. You may need to configure your 3rd party software to allow the connections.

Connection Troubleshooter

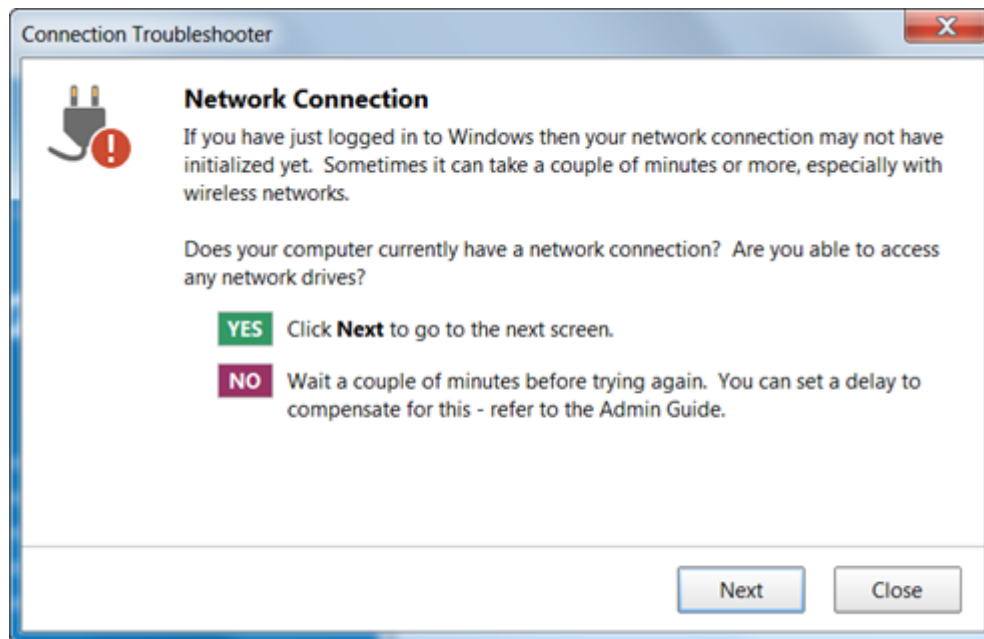
If PhonePad is unable to locate the PhonePad 5 Server, or if it is able to locate it but is unable to connect, then the **Connection Troubleshooter** wizard will automatically open.



The wizard will try to help you determine what is causing the connection issues. In most cases it is Anti-Virus software



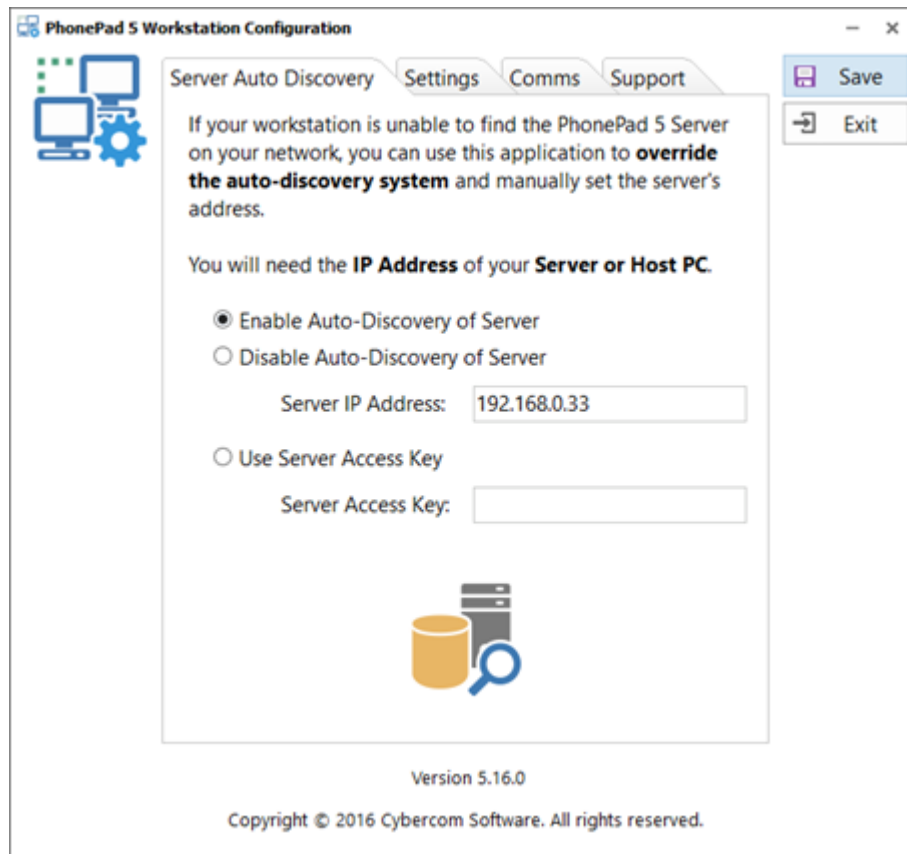
Step through each screen by clicking the **Next** button, and try each of the suggestions.



What to Do if PhonePad Can't Find the Server

If you have tried everything and still can't find out what is blocking PhonePad's automatic connection system, then you can override the server auto-discovery system by manually specifying the server settings.

1. Run the **Workstation Configuration** application (WorkstationConfig.exe) - it's located in the PhonePad 5 folder on each workstation.



2. Select **Disable Auto-Discovery of Server**.
3. Enter the Server's IP Address.
4. Click **Save**.
5. Click **Exit**.
6. Try starting PhonePad again. You should now be able to connect to the Server or Host PC.



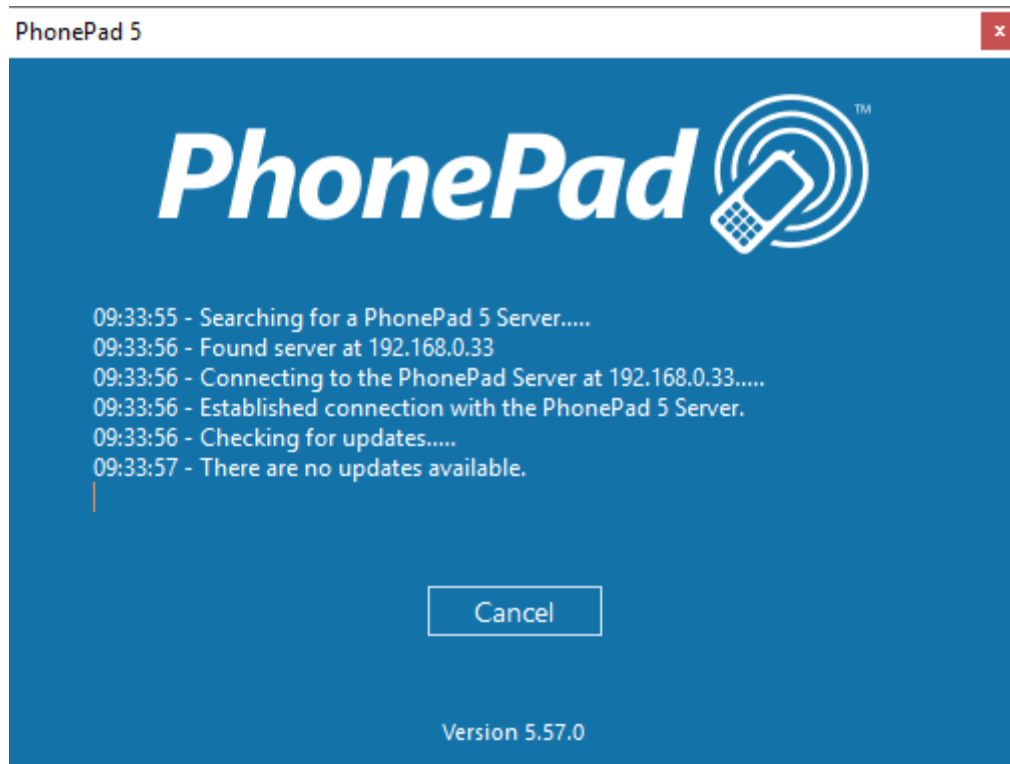
Using the ServerOverride setting will disable the automatic connection system so any changes to the Server IP Address will not be detected.

Starting PhonePad

Double-click the PhonePad 5 icon to start PhonePad.



PhonePad will auto-discover any PhonePad 5 Servers on the network and establish a connection.



It will then check for any workstation updates and install them if they are found.

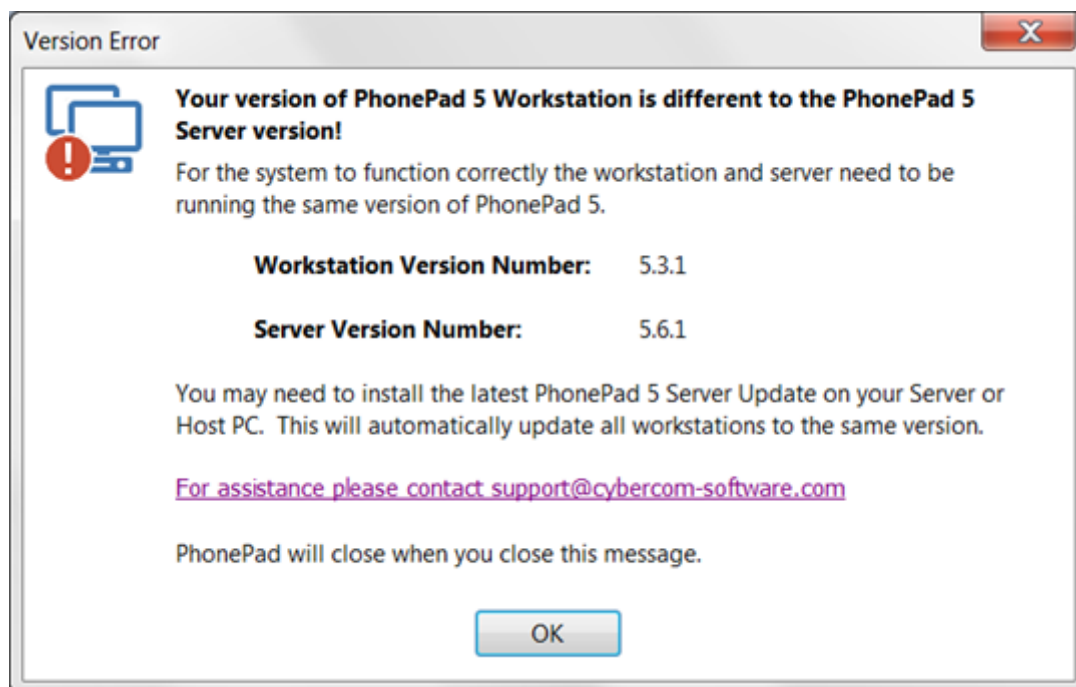
The version number of PhonePad is displayed at the bottom of this screen.

Version Mismatch

The PhonePad 5 Workstation and PhonePad 5 Server software should always be the same version. If they're not then PhonePad may not function correctly.

Normally you shouldn't have to worry about this as the PhonePad 5 Server should keep the versions on the workstations and Server/Host PC synchronized.

To avoid problems, PhonePad will check both version numbers on start up. If there is a version mismatch then an error message will be displayed:



What Can Cause a Version Mismatch?

The most common cause of a version mismatch between the PhonePad 5 Workstation software and the PhonePad 5 Server software is this scenario:

- PhonePad 5 is already up and running on a network and a new computer is installed. PhonePad 5 Workstation is downloaded from the website and installed on the new computer, but the version downloaded is a more recent version.

There are 3 ways to avoid this scenario:

1. Retain a copy of the original Workstation setup program you downloaded when you installed PhonePad. Use this copy to install PhonePad 5 Workstation on all new computers. Or download the same version from your My PhonePad account at www.myphonepad.com.
2. Install PhonePad 5 Server Updates whenever they are released.
3. Keep your system up-to-date with the latest releases by setting up automatic updates.

Another far less likely cause is that the automatic workstation updates done by the PhonePad 5 Server have failed for some reason. This can happen if the workstation has insufficient access rights for the PhonePad 5 folder. If this happens, check the access rights for the PhonePad folder and files.

Trial Period

If you are using PhonePad during the trial period you will see the trial screen appear when PhonePad starts up.



The number of days left of your trial will be displayed on this screen.

Click the **Continue Trial** button to continue using PhonePad.

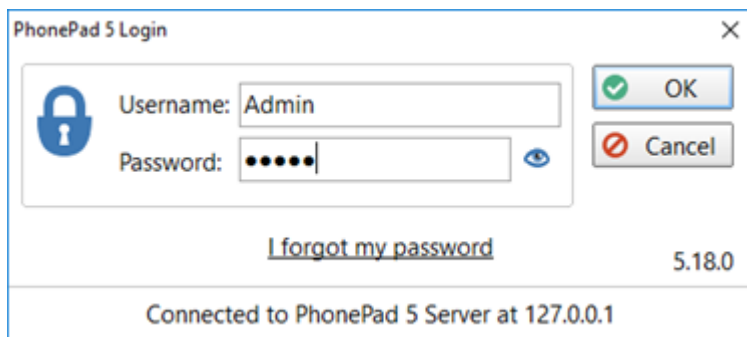
Click **Purchase** to buy PhonePad.

Click **License** to change your trial version into a fully licensed version. Once this has been done the trial screen will no longer appear.

Click **Exit** to close PhonePad.

Logging In

The login dialog is displayed when PhonePad starts up.



When logging in for the first time, use the default administrator account to login:

Username: **Admin**

Password: **admin**

The **username** is *not* case-sensitive but the **password** is. Make sure **CAPS LOCK** is **not** on.

Once you have typed in your user name and password, click **OK** to continue the login process. You will be given *three attempts* to login. After a third unsuccessful attempt PhonePad will automatically shut down.

If you click on the "eye" icon and hold down your mouse button, it will reveal the password you entered. You can use this to verify that you entered your password correctly.

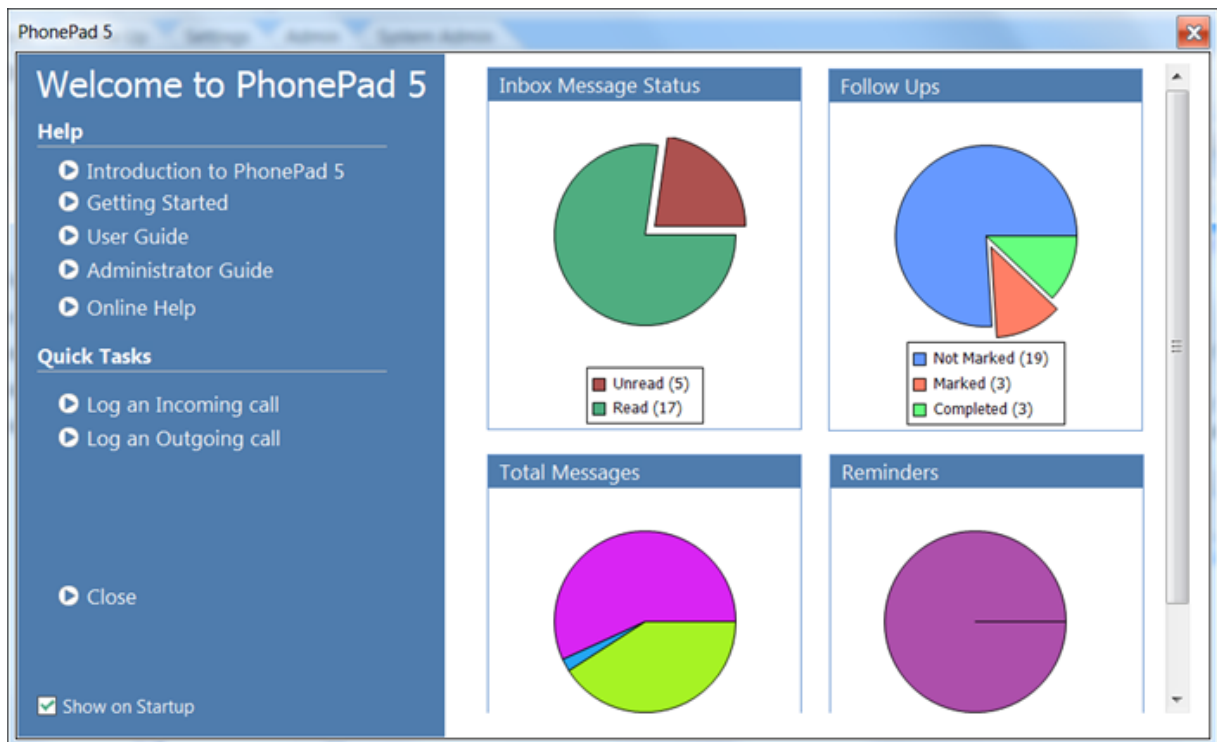
Notice the *I forgot my password* link on the login dialog? This is a feature that you can enable for users and yourself. PhonePad can send the password to a user's email address or cell/mobile phone.

The login dialog also displays the IP Address of the PhonePad 5 Server you are connected. This can be useful if you have multiple PhonePad 5 Servers on your network.

The PhonePad version number is also shown on the login dialog (it is *5.18.0* in this example).

Welcome Screen

After you login, the Welcome window should be displayed (unless the Show on Startup check box has been unchecked).



This window has a number of handy links in addition to a graphical overview of the current status of all of your messages.

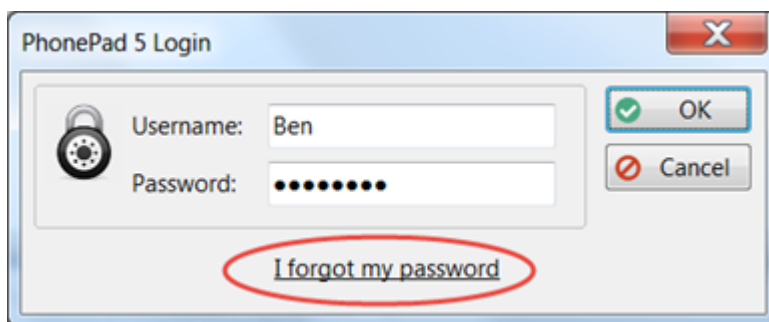
Add Some Users

One of the first things you will want to do as a PhonePad administrator is to set up user accounts for each of your users.

Refer to the **Adding Users** section.

I Forgot My Password

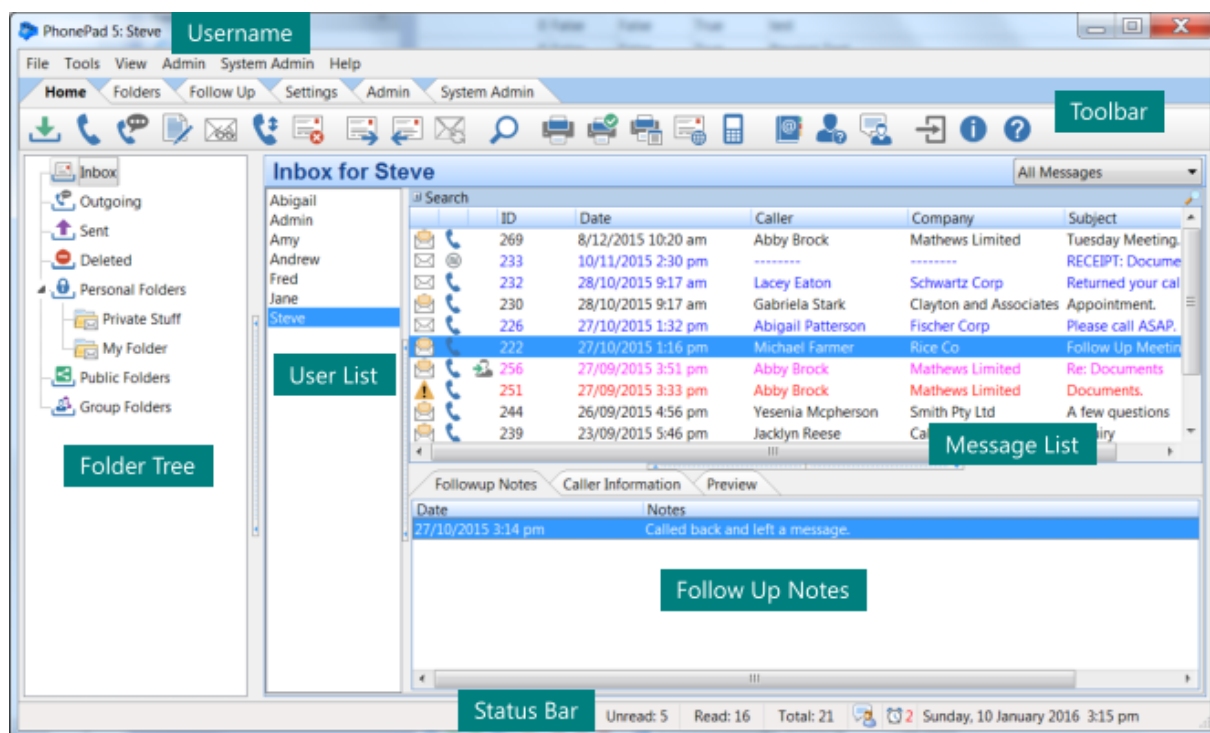
Do yourself a big favor and enable the **I Forgot My Password** option. When a user forgets their password they can click this link and have their password sent to them by email, SMS or Pushover. That means you won't have to spend time resetting user passwords.



To enable this feature, you will need to set your Communication Settings and Notifications.

User Interface

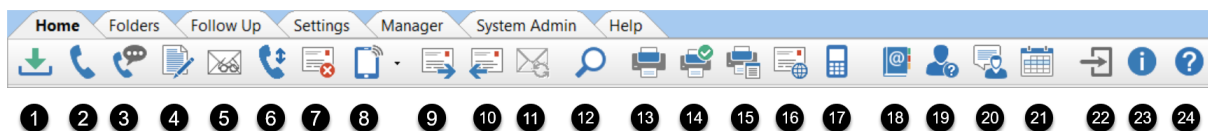
The main window features menus, a multi-tabbed toolbar, the folder tree, the inbox, follow up notes and the status bar. The window's title bar shows the currently logged-in user.



Toolbar

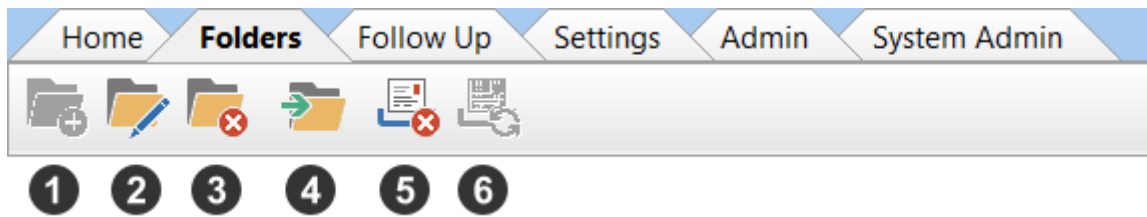
PhonePad 5 features a multi-tab toolbar, organized by functionality. These features can also be accessed via the menus.

Home Tab



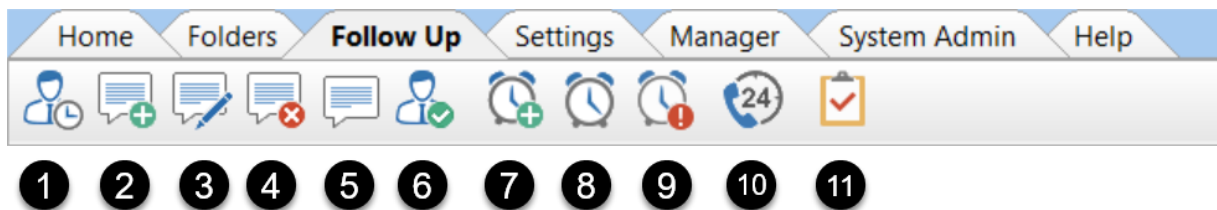
1	Check for new messages.
2	Create new incoming phone message.
3	Create new outgoing phone message.
4	Create text message (not to be confused with SMS messages).
5	View message.
6	View CallFlow.
7	Delete message.
8	Short Messages.
9	Forward message.
10	Reply to message.
11	Resend message (only applies to message in the Sent folder).
12	Search for a message.
13	Print message.
14	Quick print message.
15	Print message list.
16	Email selected message.
17	Dial phone number in the selected message (requires TAPI devices).
18	Access the PhonePad Address Book.
29	Open WhereRU, the PhonePad In-Out Board.
20	Open Instant Chat, and instant messaging application included with PhonePad.
21	Appointment Calendar. Open the Appointment Calendar application.
22	Exit PhonePad (also logs out).
23	Show About window.
24	Show online help.

Folders Tab



1	Create a new folder.
2	Edit a folder.
3	Delete a folder.
4	Move messages to another folder.
5	Empty a folder.
6	Undelete a message in the Deleted folder.

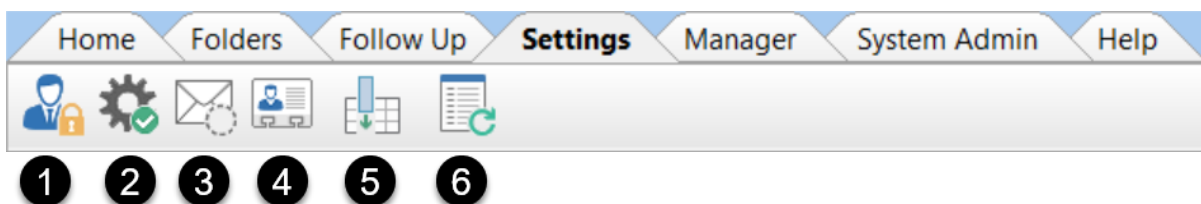
Follow Up Tab



1	Mark/unmark message for Follow Up.
2	Add Follow Up note.
3	Edit Follow Up note.
4	Delete Follow Up note.
5	View Follow Up note.
6	Mark Follow Up as Completed.
7	Add Reminder.
8	Manage Reminders.
9	View Reminders.

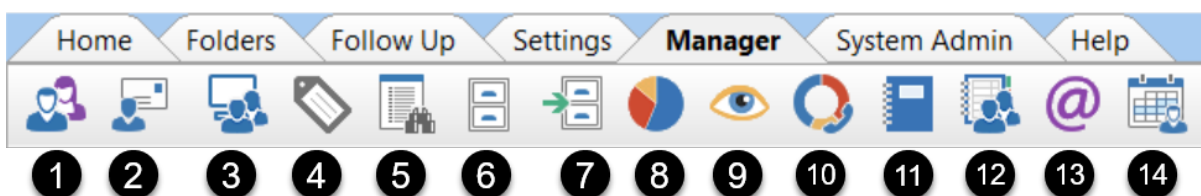
10	View Call History for Caller ID.
11	Open the To Do list.

Settings Tab



1	Change PhonePad password.
2	User Preferences.
3	Automatic Message Forwarding settings (requires MessageSender 6 to work).
4	Caller ID Settings.
5	Select the columns you want displayed in the selected message list. Each of the message lists can be set independently of each other, eg. Inbox, Sent folder, Outgoing folder, etc.
6	Refresh all lookup lists. The lookup lists are updated regularly but it can sometimes take a little while to propagate to all workstations. You can force the lookup lists to update immediately.

Manager Tab

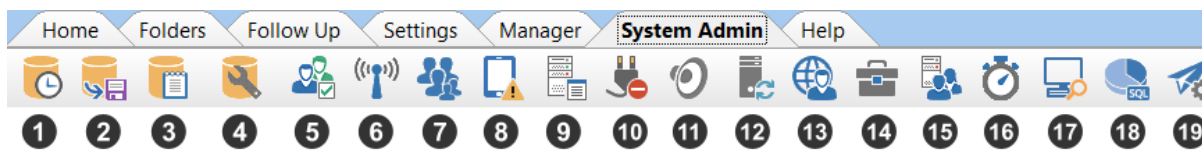


1	Manage Users.
2	External Users.
3	Manage Groups.
4	Label Editor.
5	Manage Lookup Lists (Categories, Contact Types, References).

6	View Archived Messages.
7	Archive Messages.
8	Message Overview.
9	Master View.
10	Dashboard.
11	Reports.
12	Find duplicate Address Book entries.
13	Manage each user's email addresses on one screen.
14	Manage which users are displayed in the Appointment Calendar.

The **Manager** toolbar is only visible to users with the Manager or Administrator role.

System Admin Tab

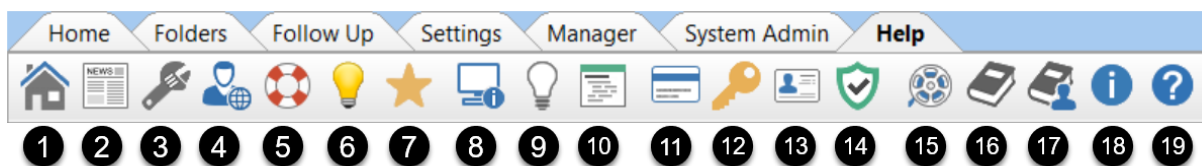


1	Automatic Backups.
2	Perform a manual backup.
3	View backup logs.
4	Repair database.
5	System Rules.
6	Communication Settings.
7	MessageSender Queue.
8	Notifications.
9	Server Logs.
10	Logout Users.
11	Broadcast a message to all users.

12	Server Updates.
13	Remote Access.
14	System Maintenance (use with caution).
15	Server Sessions.
16	Speed Test.
17	Log Viewer.
18	SQL Performance Monitoring.
19	MessageSender Settings.

The **System Admin** tab is only visible to users with the Administrator role. Standard users and Managers cannot access this tab.

Help Tab



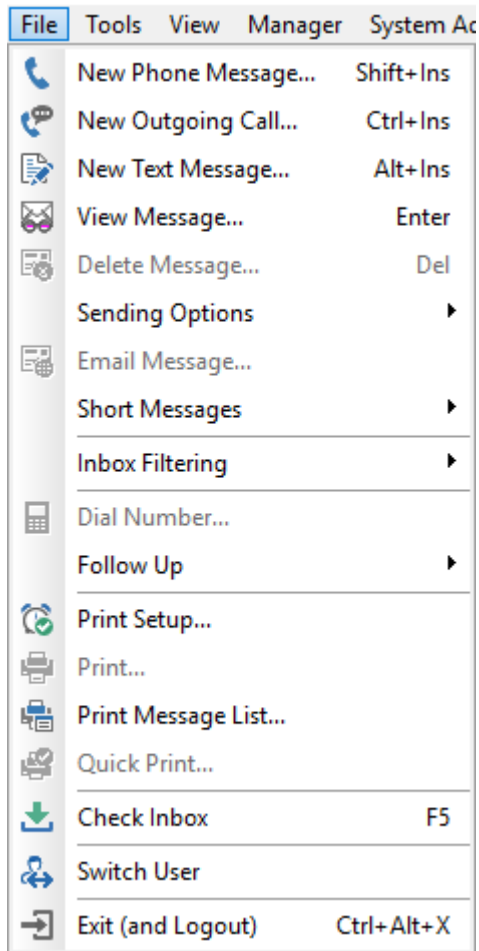
1	Go to PhonePad Home Page.
2	View the Latest News on the Cybercom Software Blog.
3	Access the online support center when you need help with something.
4	Go to your online PhonePad account.
5	Lodge a support request. You can alternatively send an email to support@cybercom-software.com
6	Send us your suggestions. We love getting feedback. Suggestions often lead to valuable new features so have at it.
7	Leave a review of PhonePad and Appointment Calendar. Your review is invaluable in informing and attracting new customers. This helps us stay in business, developing PhonePad and new products we have lined up. Please consider leaving a review. It only takes a couple of minutes.
8	Display important system information. Often needed for support purposes.
9	Show Tip of the Day.

10	View the What's New window.
11	Buy PhonePad 5 if you don't already have a license, or upgrade to another version or edition.
12	Enter your license details to license your copy of PhonePad. This is a system-wide setting so it only needs to be done once.
13	Display your PhonePad license details.
14	Display your current Update Plan details.
15	Go to the Video Tutorials page on our website.
16	View the Admin Guide
17	View the User Guide.
18	Show About window.
19	Show online help.

Menus

PhonePad 5 has 6 menus. Many of the features covered by the menus can also be accessed via the toolbar.

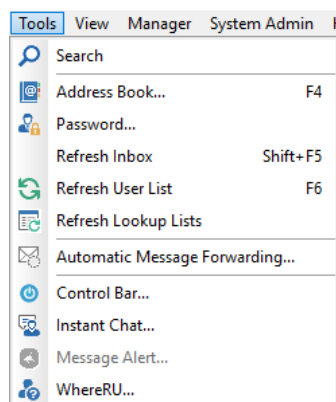
File Menu



New Phone Message	Open a new phone message for logging an incoming call.
New Outgoing Message	Open a new phone message for logging an outgoing call.
New Text Message	Open a new text message. This is not the same as an SMS text message.
View Message	Open the selected message for viewing.
Delete Message	Delete the selected message. Deleted messages are moved to the Deleted Folder.
Sending Options	Forward, reply to, or resend the selected message.
Email Message	Email the selected message.
Short Messages	Send quick messages to other users using SMS or Pushover.
Inbox Filtering	Filter the messages in the Inbox.

Dial Number	Dial the phone number contained in the selected message, if you have a TAPI compliant device attached.
Follow Up	Mark/unmark a message for Follow Up, or mark a message as completed.
Print Setup	Specify the default printer to use.
Print	Print the selected messages.
Print Message List	Print a list of all messages.
Quick Print	Print the selected messages using a simplified layout.
Check Inbox	Check for any new messages.
Switch User	Log out and log in as another user.
Exit (and Logout)	Log out of PhonePad and close it.

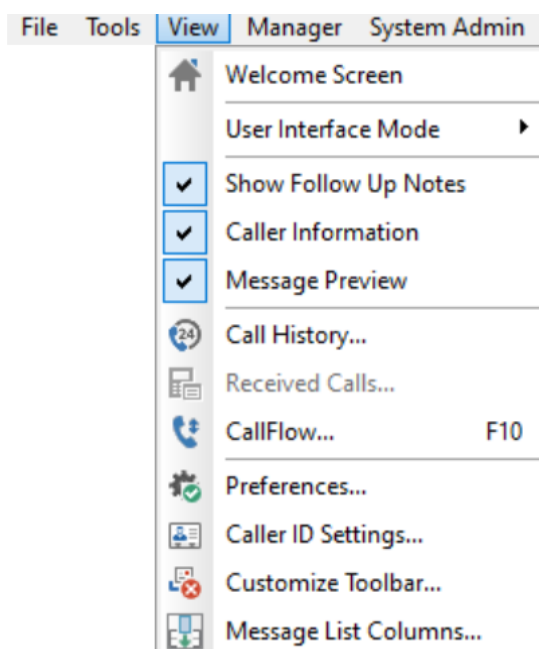
Tools Menu



Search	Search for messages by caller, company, phone number, message text and subject.
Address Book	Maintain all of your PhonePad contacts.
Rename Address Book Company	Rename a company wherever it appears in the Address Book.
Password	Change your PhonePad password.
Refresh Inbox	Force update the message list in Inbox.

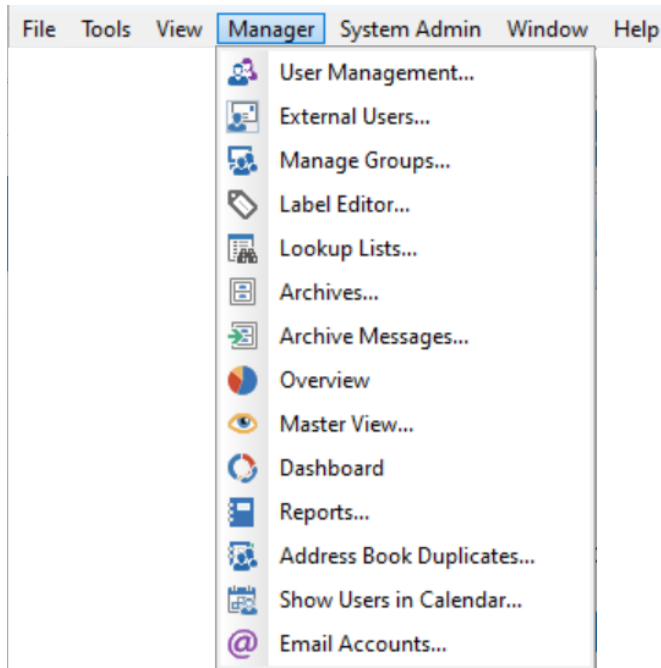
Refresh User List	Refreshes the user list if it is displayed. The user list is only displayed if you have access to other user's folders.
Disable Confirmation Dialogs	Provides a way to disable all confirmation dialogs at once, instead of disabling them individually in Preferences .
Disable Voice Announcements	Provides a way to disable all voice announcements at once, instead of disabling them individually in Preferences .
Automatic Message Forwarding	Specify your message forwarding settings. Requires MessageSender 6.
Appointment Calendar	Open the PhonePad Appointment Calendar.
Control Bar	This toolbar gives you quick access to common PhonePad features. It runs separately from PhonePad.
Instant Chat	Open InstantChat, the instant messaging application.
To Do List	Open the To Do List application.
Message Alert	If you have access to multiple Inboxes, Message Alert can give you new message notifications for each Inbox.
WhereRU	Open WhereRU, the staff availability application.

View Menu



Welcome Screen	Open the Welcome window. This window can be set to display at startup.
User Interface Mode	Select the User Interface Mode most suitable to the way you work: Basic, Standard, Advanced and Custom.
Show Follows Ups	Show/Hide the Follow Ups tab.
Caller Information	Show/hide the Caller Information tab.
Message Preview	Show/hide the Message Preview tab.
Call History	Open the Call History window. If your network has a Caller ID device connected then this window will show all incoming and outgoing calls.
Received Calls	Open the Received Calls window. If the computer is connected to a TAPI-compliant device then this window will show all phone calls received.
CallFlow	Open the CallFlow window, which displays all messages for the selected caller.
Preferences	Customize your personal settings for various features.
Caller ID Settings	If you have a TAPI-Compliant device or a CallerID.com device, then you can configure PhonePad to use them by selecting this option.
Customize Toolbar	Allows you to show or hide buttons on the various toolbars so that only the buttons you use are displayed.
Message List Columns	Set the columns you want appearing in each folder. Edits the message list in the selected folder.

Manager Menu

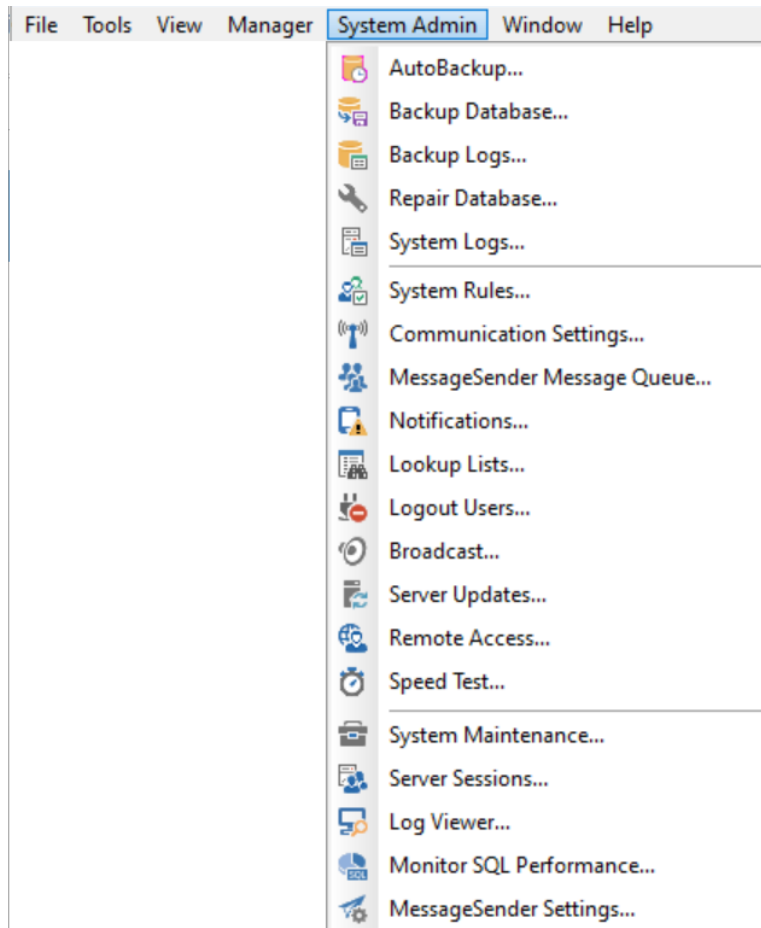


User Management	Create, edit and delete users, set Address Book permissions, and more.
External Users	Create, edit and delete external users.
Manage Groups	Add, edit and delete groups.
Label Editor	Customize some of the labels in the phone messages window.
Archives	Open the message archives.
Archive Messages	Archive messages for all users based on the date.
Overview	Provides a graphical overview of the current status of messages for all users.
Master View	The Master View is essentially a master Inbox. It shows all messages that are currently in all user Inboxes.
Dashboard	Launch the Dashboard.
Reports	Open the reports window where you can run a number of reports.
Address Book Duplicates	Searches the Address Book for duplicate entries.
Show Users in Calendar	Manage which users are displayed in the Appointment Calendar.

Email Accounts	Manage each user's email addresses on one screen.
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The Manager menu is only visible to users with the Manager or Administrator role. Standard users cannot access this menu.

System Admin Menu

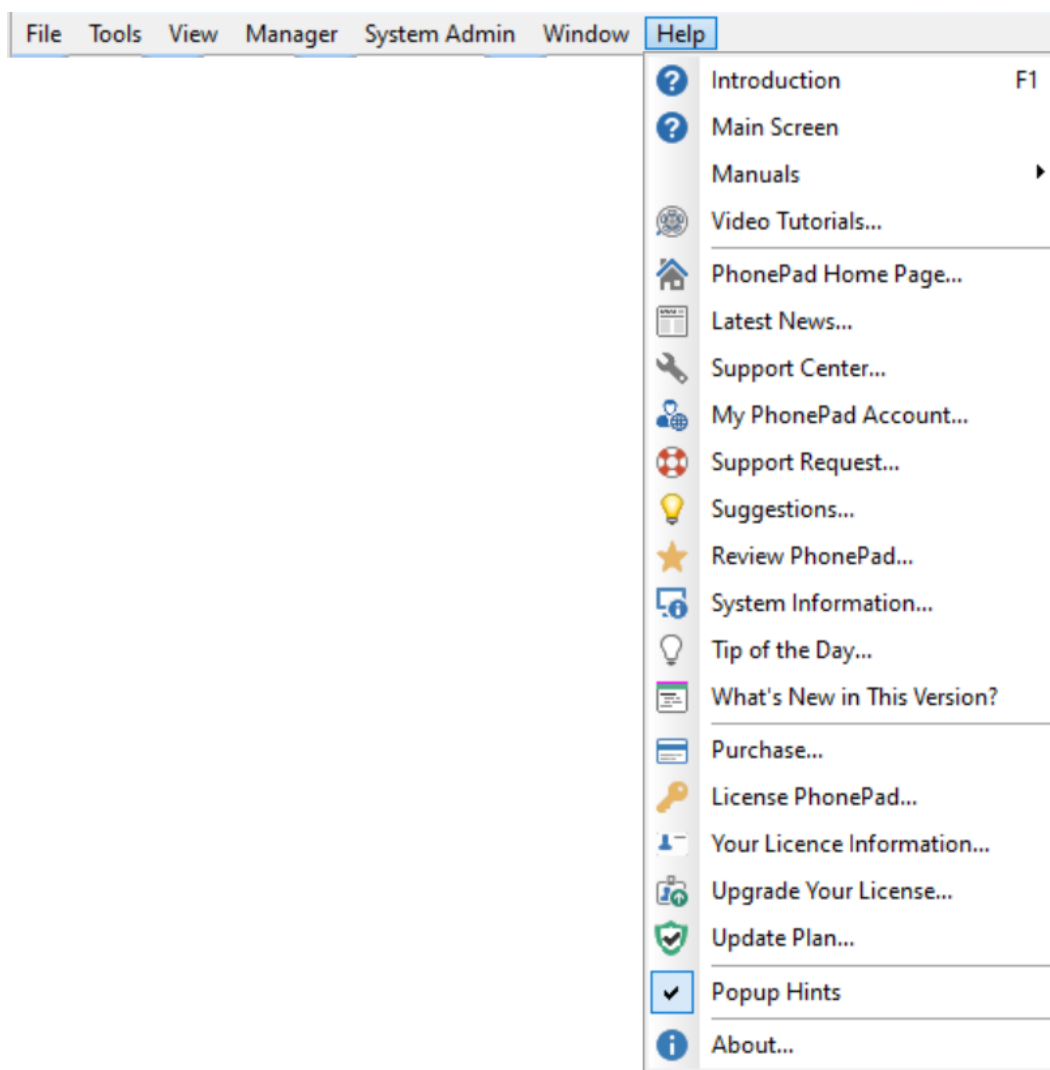


AutoBackup	Maintain the Automatic Backup system.
Backup Database	Manually backup your PhonePad database.
Backup Logs	View the backups logs for automatic and manual backups.
Repair Database	Repair the PhonePad database if you have some data corruption.
System Logs	The system logs keep a history of system processes that have been run, eg. repairs, backups, etc. as well as any errors the system has encountered.
System Rules	Define system wide settings that apply to all users.

Communication Settings	Add system-wide settings for email, SMS and Pushover. Applies to many features including MessageSender.
MessageSender Message Queue	Enables you to view and manager the MessageSender message queue directly from within PhonePad.
Notifications	Receive notifications when system events occur. Also set up Forgot My Password so that users can receive their password when they forget it.
Lookup Lists	Maintain various lookup lists.
Logout Users	Force all users to log out of PhonePad, except you. This is sometimes need when performing system maintenance such as database repairs or PhonePad 5 Server updates.
Broadcast	Broadcast a message to all PhonePad users.
Server Updates	Check for any new versions of PhonePad. Used to download and install updates to the server and workstations.
Remote Access	Set up Remote Access so remote users can login to PhonePad 5 over the Internet.
Speed Test	The Speed Test measures the response time between a workstation and the PhonePad 5 Server.
System Maintenance	We strongly recommend you don't use any options on this screen unless advised to by Support.
Server Sessions	Displays all currently logged in users.
Log Viewer	Opens the Log Viewer.
Monitor SQL Performance	Allows you to log SQL performance to identify any bottlenecks that may be slowing server response times.
MessageSender Settings	Configure MessageSender from within PhonePad (avoids having to go to your Server or Host PC).

The System Admin menu is only visible to users with the System Administrator role. Standard users and Managers cannot access this menu.

Help Menu

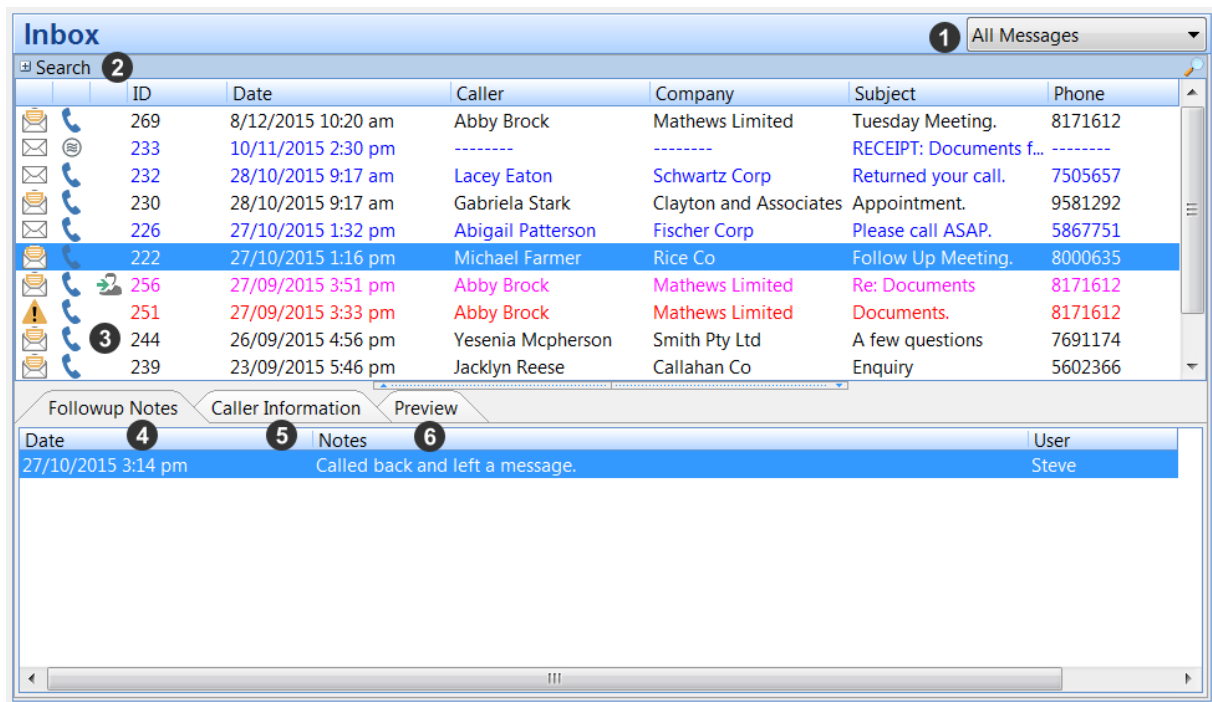


Introduction	Display online help.
Main Screen	Display an online help topic about PhonePad's main window.
Manuals	Open the User Guide and/or Admin Guide from within PhonePad.
Video Tutorials	Go to the Video Tutorial page on the website.
PhonePad Home Page	Go to the PhonePad home page.
Latest News	View the latest PhonePad news.
Support Center	Access the online support center when you need help with something.
My PhonePad Account	Go to your online PhonePad account (My PhonePad) where you can view your license details, update your contact information, etc.

Support Request	Lodge a support request if you're having problems.
Suggestions	Tell us your suggestions for improving and enhancing PhonePad.
Review PhonePad	Reviews help potential customers make an informed decision about purchasing PhonePad, and help us get more customers so that we can continue to develop it.
System Information	Displays important system information. Often needed for support purposes.
Tip of the Day	Displays random tips designed to help you get the most out of your software.
What's New in This Version	Displays the changes that have been made in the installed version of PhonePad 5.
Purchase	Buy PhonePad 5 if you don't already have a license, or upgrade to another version or edition.
License PhonePad	Enter your license details to license your copy of PhonePad. This is a system-wide setting so it only needs to be done from one workstation.
Upgrade Your License	Upgrade your license to add more users.
Your License Information	Display your PhonePad license details.
Update Plan	Display your current Update Plan details.
Suggestions	Tell us your suggestions for improving and enhancing PhonePad.
Popup Hints	If checked, popup hints will be displayed for toolbar buttons.
About	Display information about PhonePad.

Inbox

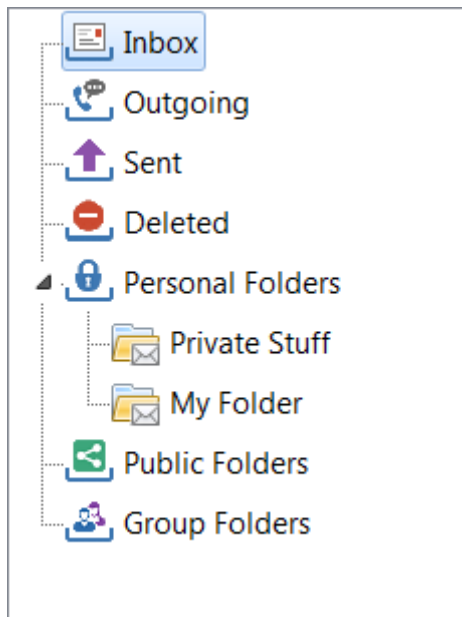
The Inbox is where you'll probably spend most of your time in PhonePad. It contains all of the messages you receive.



1	Message Filter. Select the filter you want to apply from the drop-down menu.
2	The Search option allows you to search for messages in your Inbox. Click the small button to open the search feature.
3	Inbox message list. Like the other folders, the Inbox features a color-coded message list.
4	The Follow Up Notes tab displays all notes for the selected message.
5	The Caller Information tab displays contact information for the caller in the selected message. You can show/hide this tab on the View menu.
6	The Preview tab shows a preview of the selected message. You can show/hide this tab on the View menu.

Folder Tree

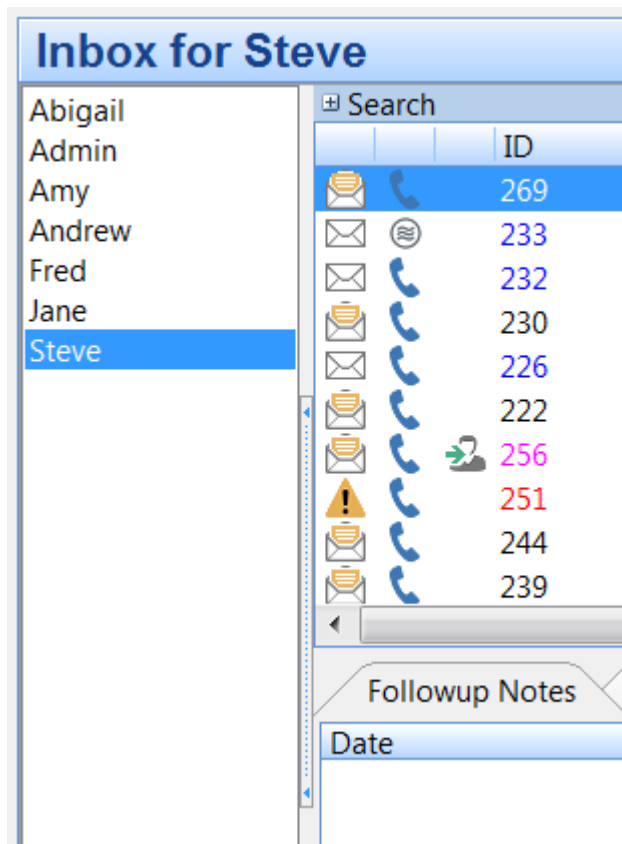
The Folder Tree gives you quick and easy access to all of the folders in PhonePad.



Inbox	The Inbox is the default folder view in PhonePad and it is where you access all of your received messages.
Outgoing	Any outgoing calls you log can be found in the Outgoing folder.
Sent	When you log an incoming call and send the message to other users, PhonePad keeps a copy of these messages in the Sent folder.
Deleted	The Deleted folder is where your messages end up when you delete them. If you need to undelete a message go to this folder. <u>Important</u> : any messages in the Deleted folder are automatically deleted by the system after 14 days.
Personal Folders	The Personal Folders folder is a storage area for any personal folders you have created.
Public Folders	The Public Folders folder is a storage area for any public folders that exist in PhonePad, ie. any public folders created by you or anyone else.
Groups Folders	The Group Folders folders contain folders for any groups set up by a PhonePad administrator.

User List

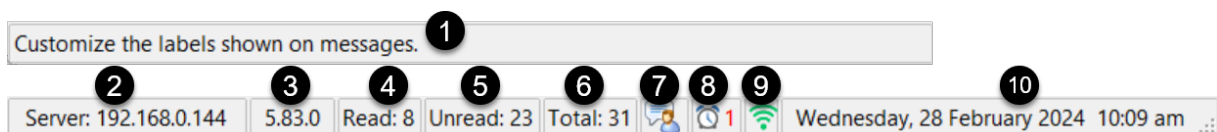
If you have been given access to other user's Inboxes by a PhonePad administrator, an user list will appear to the left of your Inbox.



You can access another user's Inbox simply by selecting their name from the user list. You will then be able to access all of their Inbox messages.

Status Bar

The Status Bar sits at the bottom of the PhonePad main window.



1	The left side of the Status Bar displays extended hints when the mouse is moved over toolbar buttons and menu items.
2	Displays the IP Address of the PhonePad Server you are connected to.
3	Displays the PhonePad Version Number.
4	Shows how many unread messages are in your Inbox.
5	Shows how many read messages are in your Inbox.

6	Shows the total number of messages that are in your Inbox.
7	Click to access Instant Chat.
8	Shows how many due reminders you have. Click to view the due reminders.
9	Status indicator for the PhonePad Workstation Notification Service. This should be green.
10	Shows the current date and time. The format is controlled by System Rules, which is set by a PhonePad administrator.
11	The resize handle allows you to resize the main screen.



If you click on the *Unread Messages*, *Read Messages* or *Total Messages* parts of the **Status Bar** your Inbox messages will be filtered for you.

Splitters

You may have noticed these little dividers between panes on the main window.

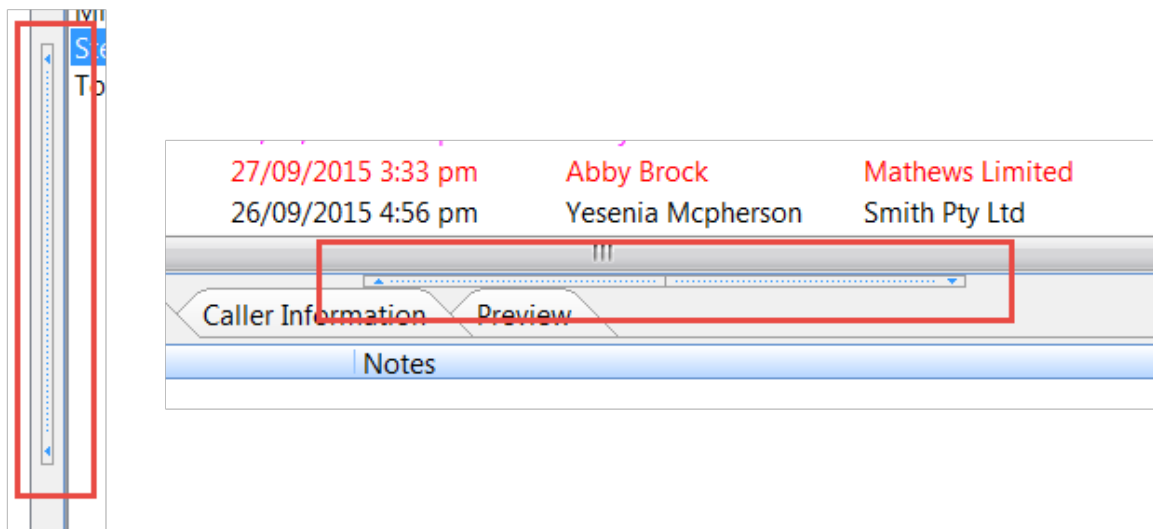


Image: Horizontal and Vertical splitters.

These are called "splitters" as they split the panes they are connected to. These splitters allow you to resize the pane you are viewing so that you can see them better. If you click on the bar with the arrows, it will open or close one of the panes.

If you position the mouse cursor outside of the bars you will see a double-arrowed cursor. By then clicking on the splitter you can resize either pane to your liking.

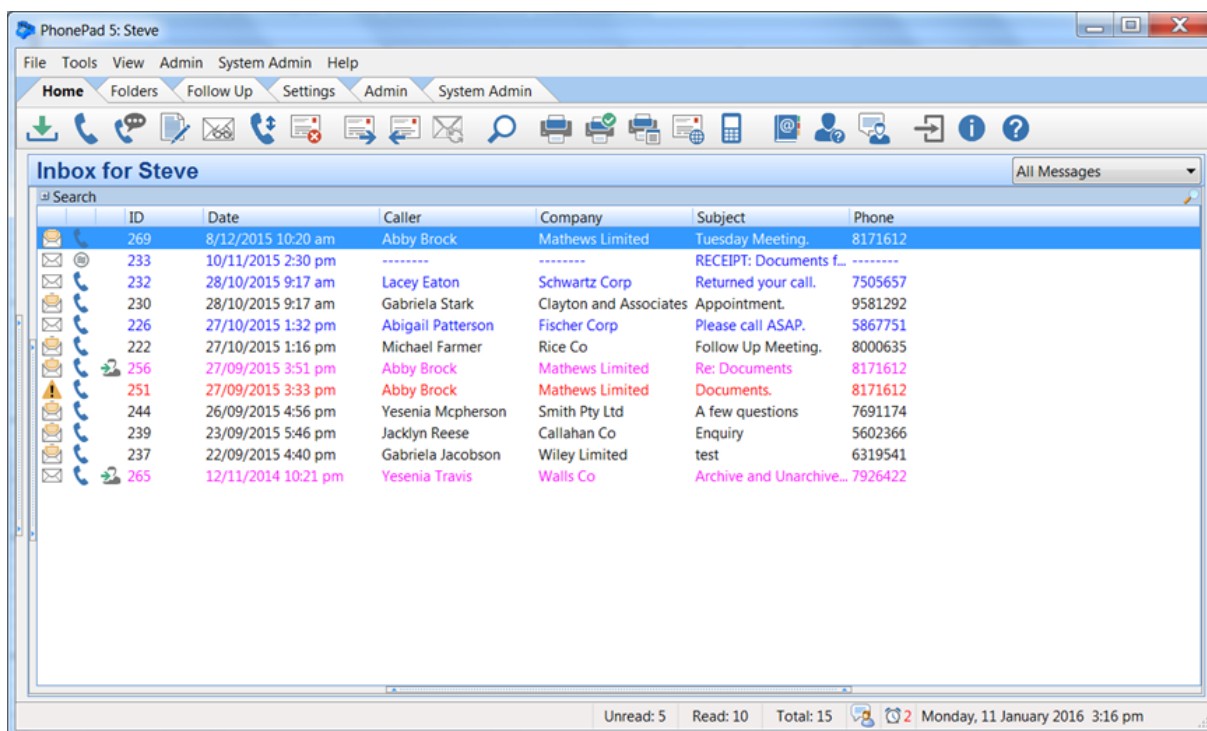


Image: All splitters closed.

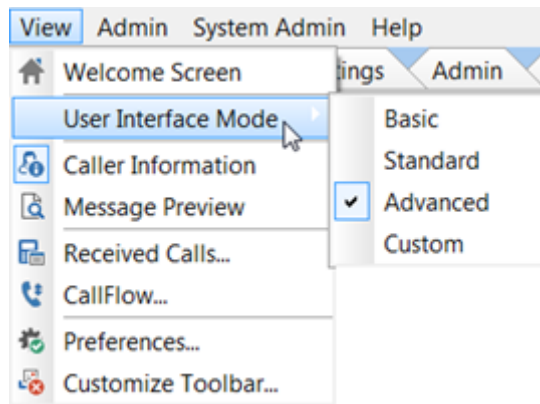
In this example you can see that all of the splitters have been closed, allowing the Inbox to fill up all of the available space.

User Interface Modes

PhonePad 5 can seem a little overwhelming with the many features and options available. To help ease into using PhonePad you can minimize the number of features available using *User Interface Modes*.

There are 3 modes available: *Basic*, *Standard* and *Advanced*. *Basic* and *Standard* show a subset of features, while *Advanced* (the default) shows all features.

You can set the mode by selecting **User Interface Modes** from the **View** menu, and then selecting the appropriate mode.

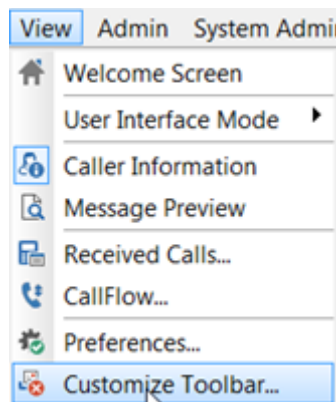


If you want more precise control over which buttons are shown on the toolbars, use the Toolbar Configuration feature. The *Custom* mode is used when you modify the toolbar configuration.

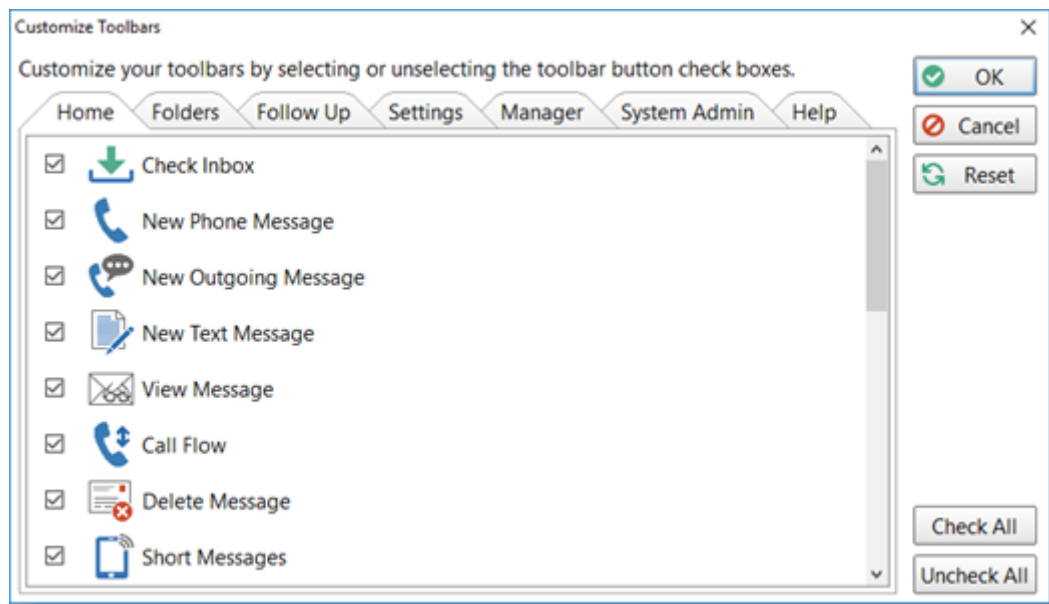
Configuring the Toolbars

If you don't use all of the features in PhonePad you can modify the toolbars so that only the buttons for the features you use are shown.

To do this, select **Customize Toolbar** from the **View** menu.



The **Customize Toolbar** window will appear.



Each of the toolbar tabs are shown (only administrators will see the Manager and System Admin tabs).

To hide a button from the toolbar just uncheck the check box next to it.

When you have made all the changes you want, click the **OK** button to save them.

The **User Interface Mode** option on the **View** menu will be set to *Custom*. You can easily switch between showing all toolbar buttons or just the buttons you have set by selecting either *Advanced* or *Custom*.

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Chapter



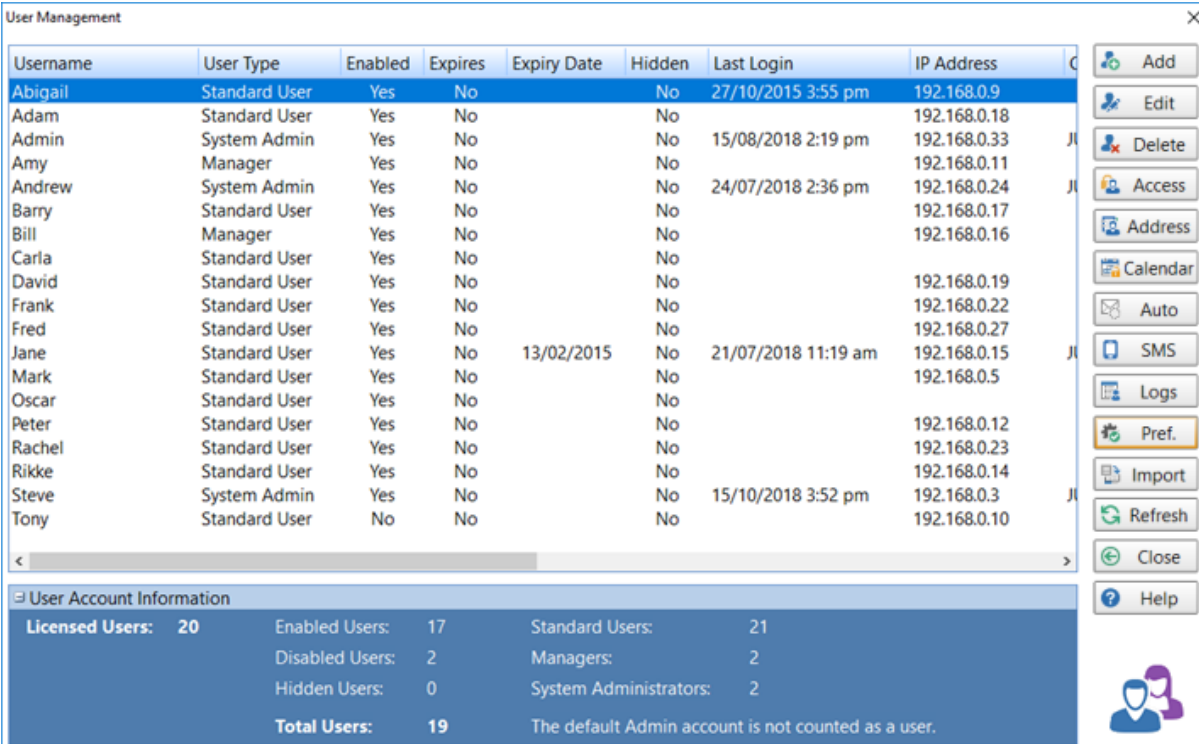
4

Managers

Managers

Managing Users

Select the **Manager** tab on the toolbar and click the **Manage Users** button, or select **Manage Users** from the **Manager** menu.



The screenshot shows the 'User Management' window. It contains a table with the following columns: Username, User Type, Enabled, Expires, Expiry Date, Hidden, Last Login, and IP Address. The table lists 20 users, including Abigail, Adam, Admin, Amy, Andrew, Barry, Bill, Carla, David, Frank, Fred, Jane, Mark, Oscar, Peter, Rachel, Rikke, Steve, and Tony. To the right of the table is a toolbar with buttons: Add, Edit, Delete, Access, Address, Calendar, Auto, SMS, Logs, Pref., Import, Refresh, Close, and Help. Below the table is a section titled 'User Account Information' which displays summary statistics.

Username	User Type	Enabled	Expires	Expiry Date	Hidden	Last Login	IP Address
Abigail	Standard User	Yes	No		No	27/10/2015 3:55 pm	192.168.0.9
Adam	Standard User	Yes	No		No		192.168.0.18
Admin	System Admin	Yes	No		No	15/08/2018 2:19 pm	192.168.0.33
Amy	Manager	Yes	No		No		192.168.0.11
Andrew	System Admin	Yes	No		No	24/07/2018 2:36 pm	192.168.0.24
Barry	Standard User	Yes	No		No		192.168.0.17
Bill	Manager	Yes	No		No		192.168.0.16
Carla	Standard User	Yes	No		No		
David	Standard User	Yes	No		No		192.168.0.19
Frank	Standard User	Yes	No		No		192.168.0.22
Fred	Standard User	Yes	No		No		192.168.0.27
Jane	Standard User	Yes	No	13/02/2015	No	21/07/2018 11:19 am	192.168.0.15
Mark	Standard User	Yes	No		No		192.168.0.5
Oscar	Standard User	Yes	No		No		
Peter	Standard User	Yes	No		No		192.168.0.12
Rachel	Standard User	Yes	No		No		192.168.0.23
Rikke	Standard User	Yes	No		No		192.168.0.14
Steve	System Admin	Yes	No		No	15/10/2018 3:52 pm	192.168.0.3
Tony	Standard User	No	No		No		192.168.0.10

User Account Information

Licensed Users: 20	Enabled Users: 17	Standard Users: 21
	Disabled Users: 2	Managers: 2
	Hidden Users: 0	System Administrators: 2
Total Users: 19	The default Admin account is not counted as a user.	

In the above example you can see what this window looks like once you have added a few users. At a glance you can see quite a bit of information about each user, including:

- Their User Type.
- The last time they logged in.
- Their workstation's IP Address.
- The name of the computer they logged in on.
- Their Windows username.
- The version of Windows on their computer.
- The version of PhonePad they are using.

Managing Users Buttons

Add	Add a new user.
Edit	Edit the selected user.

Delete	Delete the selected user.
Access	Manage the selected user's access to the Inboxes of other users.
Address	Set the Address Book permissions for the selected user.
Calendar	Set Appointment Calendar permissions. Used to grant access to other user's calendars.
Auto	Manage the selected user's Automatic Message Forwarding settings.
SMS	Manage the selected user's ability to directly send messages by SMS and Pushover.
Logs	View a complete history of when the selected user logged in and logged out of PhonePad, including which workstation they used.
Pref	Displays the Preferences of the selected user in the format they are stored in within the database. Used to fix issues with user preferences.
Import	Add multiple users by importing them.
Refresh	Refresh the user list.
Close	Close the User Management window.
Help	Access online help.

Adding Users

Select the **Manager** tab on the toolbar and click the **Manage Users** button, or select **Manage Users** from the **Manager** menu.

To add a user, click the **Add** button on the **User Management** window.

Add User

User Account

Username:

Jess

Password:

Confirm:

User Access

User Type:

Standard User

☒ Login Enabled

☐ Login Expires:

☐ Hidden Account

User Details

Firstname:

Jessica

Lastname:

Display Name:

Email:

Phone:

Cell/Mobile:

Job Title:

Receptionist

Area:

Reception

Location:

Front Desk

Photo

Load

Clear

Ok

Cancel

Help

CalendarSync

Google Email:

Outlook Email:

iOS Email:

SMS

SMS Email:

Pushover

Device Name:

Pushover Email:

Appointment Calendar

☐ Show User in Appointment Calendar

System Information

Last Login: unknown

IP Address: unknown

In the example above, we are adding a new user named Jaime.

1 - User Account (Mandatory)

Username	Enter a name for the user. They will use this to login to PhonePad.
Password	Enter a password for the user. Passwords are required by PhonePad.
Confirm	Enter the password again to make sure you didn't mistype.

2 - User Access (Mandatory)

User Type	Select a User Type for the user. They can be a Standard User (the default), a Manager, or an Administrator. .
------------------	---

	<ul style="list-style-type: none"> Managers can only create Standard User accounts. Administrators can create all 3 account types. <p>See the Administrators topic for more information</p>
Login Enabled	This should be checked (the default) unless you don't want the user to be able to login.
Login Expires	You can optionally set the user account to automatically expire at a specified date. This can be useful for temporary employees or contractors.
Hidden Account	A hidden account won't appear in any user lists. It can be logged into but users won't be able to send messages to this user.

3 - User Details (Optional)

Firstname	The user's firstname.
Lastname	The user's lastname.
Display Name	If you enter a name here, it will be displayed on the Inbox Title Bar and the User List (next to the Inbox) instead of their Username. This can be useful where you use Usernames that are difficult to read. For example, you might use the user's full name including any middle names. This could be quite cumbersome, especially if they have a long last name like Snuffleupagus.
Email	The user's email address. If you want to use the I Forgot My Password feature then the email address will be required if forgotten passwords will be sent by email.
Phone	The user's phone number.
Cell/Mobile	The user's cell/mobile number. If you want to use the I Forgot My Password feature then the cell/mobile number will be required if forgotten passwords will be sent by SMS.
Job Title	The user's job title or position.
Area	Where the user works.
Location	The user's location.

4 - Photo (Optional)

Load	Allows you to load a photo of the user. Only JPG files are currently accepted.
Clear	Removes the photo.

5 - CalendarSync (Future feature still under development)

Google Email	TBA
Outlook Email	TBA
iOS Email	TBA

6 - SMS (Optional)


SMS Email	Some cell/mobile phone providers supply customers with an email address that they can use to send SMS messages. If the user's provider does that, then it can be used with the I Forgot My Password feature.
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7 - Pushover (Optional)

Device Name	Enter a Pushover device name for the user. The device needs to be listed under your Pushover account for your business. If you want to use the I Forgot My Password feature then the Pushover device name will be required if forgotten passwords will be sent by Pushover.
Pushover Email	The Pushover email address is a more flexible option than using the Device Name. One of the reasons is users can have their own Pushover account instead of you having to use a business account.

8 - Appointment Calendar

Show User in Appointment Calendar	If you want the user to have a calendar in Appointment Calendar then check this checkbox.
--	---

 Only **User Account** and **User Access** fields are required. The others are optional.

Editing Users

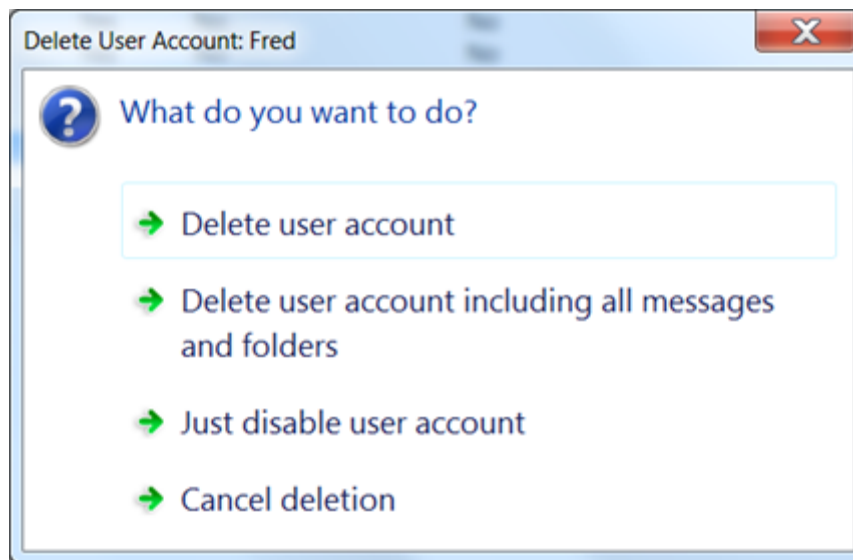
You can change any of a user's details simply by selecting the user from the list and clicking the **Edit** button, or by double-clicking on the user.

Please refer to **Adding Users** for an explanation of the fields.

Deleting a User

Select the **Manager** tab on the toolbar and click the **Manage Users** button, or select **Manage Users** from the **Manager** menu.

You can delete a user by selecting them from the list and then clicking the **Delete** button. You will be asked to confirm the deletion.



Delete user account	Deletes the user account but leaves messages and folders intact.
Delete user account including all messages and folders	Completely deletes the user account and all messages and folders they have.
Just disable user account	Disables the user account so they can't login. Messages and folders remain intact.
Cancel deletion	Cancels deleting the user.



Once a user's account, messages and folders have been deleted they cannot be recovered. You could restore this data from a backup but then you would overwrite more recent data.

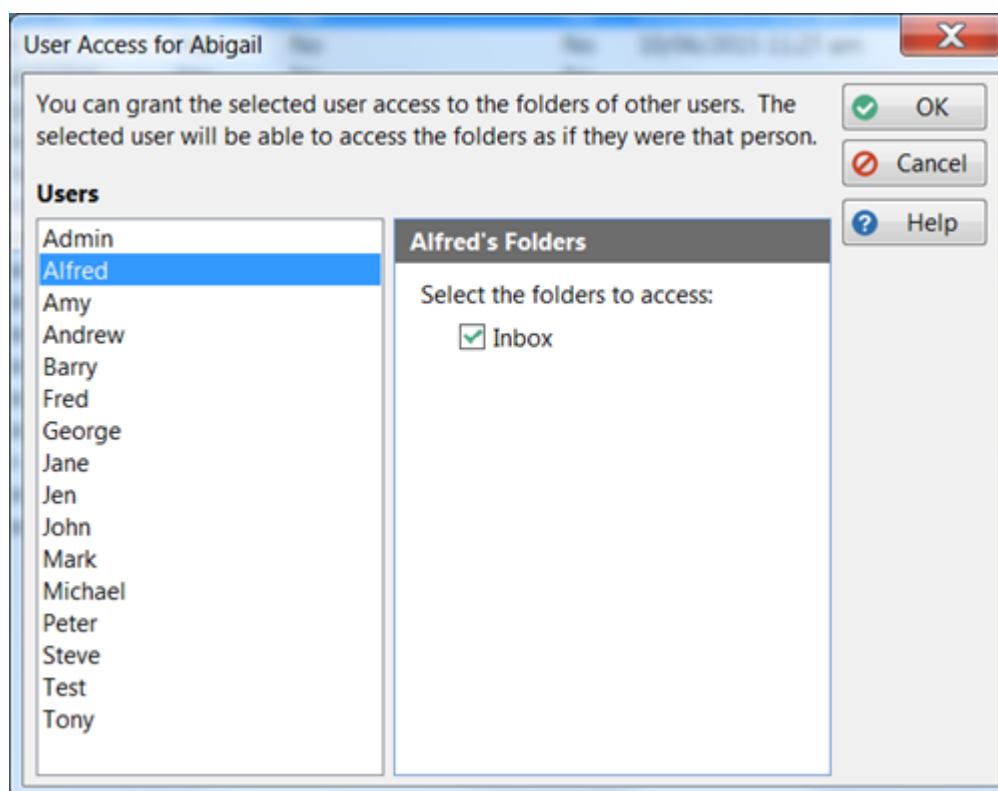
Giving a User Access to Another User's Folders

Select the **Manager** tab on the toolbar and click the **Manage Users** button, or select **Manage Users** from the **Manager** menu.

You can provide a user access to one or more other user's folders. In PhonePad 4 this was known as "Receptionist Mode".

This access is ideal for receptionists, executive assistants, office managers, and others who need access to other users messages. The access can be given and revoked at any time by a Manager or Administrator.

Select a user from the list and click the **Access** button



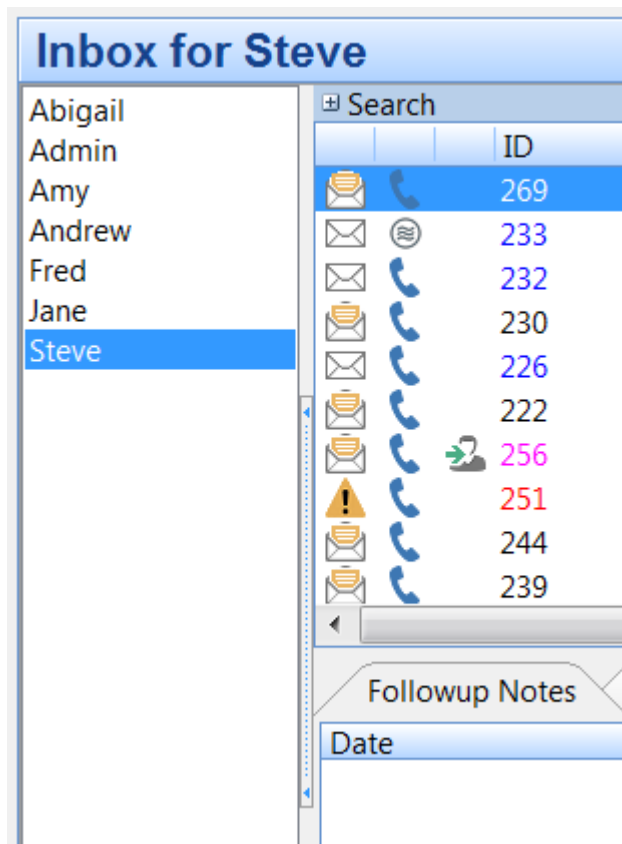
The username you selected will be displayed in the User Access window's title bar, as shown above. In this example we selected Abigail, because we want to give Abigail access to other user's folders.

To give her access to Alfred's folders, we select Alfred from the list on the left and then check the **Inbox** check box. We can then go ahead and select additional users to give Abigail access to if we want. Once the **OK** button is clicked she will immediately have access (although she may need to restart PhonePad).

Note: The only folder option in this release of PhonePad is the Inbox. However, other folders will be added in future releases.

User List for Viewing Inboxes

If you have been given access to other user's Inboxes by a PhonePad administrator, an user list will appear to the left of your Inbox.



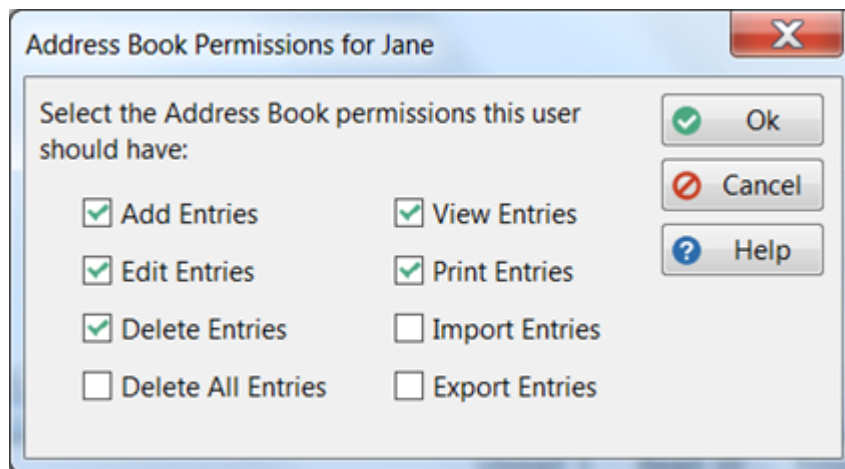
You can access another user's Inbox simply by selecting their name from the user list. You will then be able to access all of their Inbox messages.

Setting Address Book Permissions

You can restrict the level of access each user has to the PhonePad Address Book, or you can give them full access to all features.

For example, you may have a temporary employee and you're worried that they may abscond with your contact list when they leave. You could disable their ability to print and export Address Book entries.

Select a user from the list and click the **Address** button.



In the above example we are setting the Address Book permissions for Jane. By default, Jane has the following permissions (as do all users):

- Add Entries
- Edit Entries
- Delete Entries
- View Entries
- Print Entries

These are the permissions you can set:

Add Entries	If checked, the user can add contacts to the Address Book.
Edit Entries	If checked, the user can update contacts in the Address Book.
Delete Entries	If checked, the user can delete contacts from the Address Book.
Delete All Entries	If checked, the user delete all contacts from the Address Book.
View Entries	If checked, the user can view contacts in the Address Book.
Print Entries	If checked, the user can print Address Book contacts.
Import Entries	If checked, the user can import contacts into the Address Book.
Export Entries	If checked, the user can export contacts from the Address Book.

Setting Up Automatic Message Forwarding for Users

Each user can set their own Automatic Message Forwarding settings by selecting **Automatic Message Forwarding** from the **Tools** menu. As a *Manager* or *System Administrator* you can also change these settings for each user.

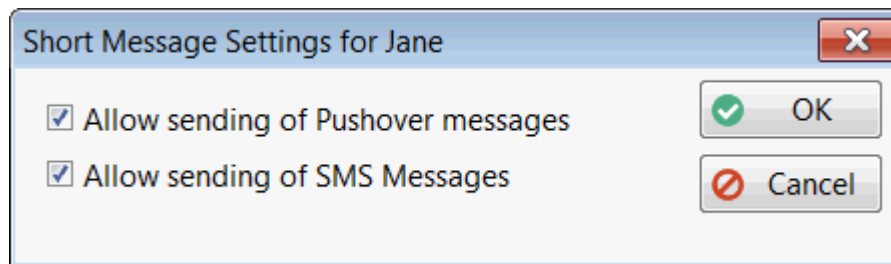
Simply click the **Auto** button to access the settings for the selected user. You can then change the settings as if you were the user.

Giving Users Access to SMS and Pushover

You can restrict access to the "Short Messages" feature in PhonePad by only letting specific users access it. This feature allows users to send quick messages using Pushover and SMS. It is completely separate from the Automatic Message Forwarding feature and is not used for forwarding phone messages.

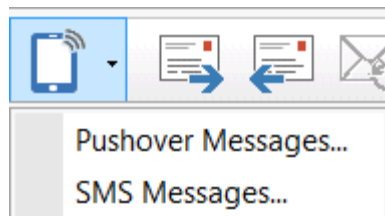
To set the access for a user:

1. Select a user from the list of users, then click the **SMS** button.



2. Check or uncheck the appropriate check boxes and then click **OK**.

The user will be able to access the **Pushover Messages** and **SMS Messages** options from the **Short Messages** menu button:



User Logs

You can view the logs for any user by selecting their name and clicking the **Logs** button.

User logs for Steve

Log Date	User	Log Event	Details	IP Address	Computer Name	Windows Username
11/01/2016 8:32 pm	Steve	Logged In		192.168.0.7	JUPITER2	Steve
11/01/2016 8:05 pm	Steve	Logged Out		192.168.0.7	JUPITER2	Steve
11/01/2016 8:05 pm	Steve	Logged In		192.168.0.7	JUPITER2	Steve
11/01/2016 7:55 pm	Steve	Logged Out		192.168.0.7	JUPITER2	Steve
11/01/2016 7:41 pm	Steve	Logged In		192.168.0.7	JUPITER2	Steve
11/01/2016 7:40 pm	Steve	Logged Out		192.168.0.7	JUPITER2	Steve
11/01/2016 7:39 pm	Steve	Logged In		192.168.0.7	JUPITER2	Steve
11/01/2016 7:38 pm	Steve	Logged Out		192.168.0.7	JUPITER2	Steve
11/01/2016 7:37 pm	Steve	Logged In		192.168.0.7	JUPITER2	Steve
11/01/2016 5:49 pm	Steve	Logged Out		192.168.0.7	JUPITER2	Steve
11/01/2016 5:17 pm	Steve	Logged In		192.168.0.7	JUPITER2	Steve
11/01/2016 5:15 pm	Steve	Logged Out		192.168.0.7	JUPITER2	Steve
11/01/2016 5:15 pm	Steve	Logged In		192.168.0.7	JUPITER2	Steve
11/01/2016 5:10 pm	Steve	Logged Out		192.168.0.7	JUPITER2	Steve
11/01/2016 5:09 pm	Steve	Logged In		192.168.0.7	JUPITER2	Steve
11/01/2016 5:08 pm	Steve	Logged Out		192.168.0.7	JUPITER2	Steve
11/01/2016 4:37 pm	Steve	Logged In		192.168.0.7	JUPITER2	Steve
11/01/2016 4:28 pm	Steve	Logged Out		192.168.0.7	JUPITER2	Steve
11/01/2016 4:11 pm	Steve	Logged In		192.168.0.7	JUPITER2	Steve
11/01/2016 4:06 pm	Steve	Logged Out		192.168.0.7	JUPITER2	Steve
11/01/2016 3:09 pm	Steve	Logged In		192.168.0.7	JUPITER2	Steve
11/01/2016 3:08 pm	Steve	Logged Out		192.168.0.7	JUPITER2	Steve

Importing Users

If you have a lot of users to add you may want to consider importing them using the Import function. Click the **Import** button.

User accounts can be created quickly by importing user details from a **CSV-format** file. Fields should be in the order as shown below.

CSV Import Details

Import File: D:\Data\UserImport.csv

Separator: Comma ☐ Enclosed Fields Enclosing Character: Double Quotes

Imported Data

Firstname	Lastname	Username	Password	Email	Telephone
Michael	Jones	Michael	password	michael@xyz.co...	0262919241
Jennifer	Anderson	Jen	password	jen@123.com	0262919241
Barry	Simpson	Barry	password	bazza@abc.com	0262916241
Anthony	Cardigan	Tony	password	tony@abc.com	0262919241

No of Rows: 4

Column and Field Mapping

Firstname: Column 1 Lastname: Column 2 Username: Column 3 Password: Column 4

Email: Column 5 Telephone: Column 6 Mobile/Cell: Column 7

0%

1. Select the import file.
2. If you have a standard CSV file then the default settings for **Separator**, **Enclosed Fields** and **Enclosing Characters** should work. If they don't work then you may need to change them.
3. Set up the **Column and Field** Mapping. You will need to specify which columns in your CSV data match the fields used by PhonePad.
4. When you're ready click the **Load** button. The data will be loaded into the **Imported Data** grid.
5. If all looks good, click the **Import** button to import the users into the database.

Note: Any users already existing will not be imported.












Managers and System Administrators

Managers and System Administrators are a special type of user that have access to features that Standard Users don't have.

System Administrators have access to everything in PhonePad. A Manager has access to a sub-set of administrative functions.

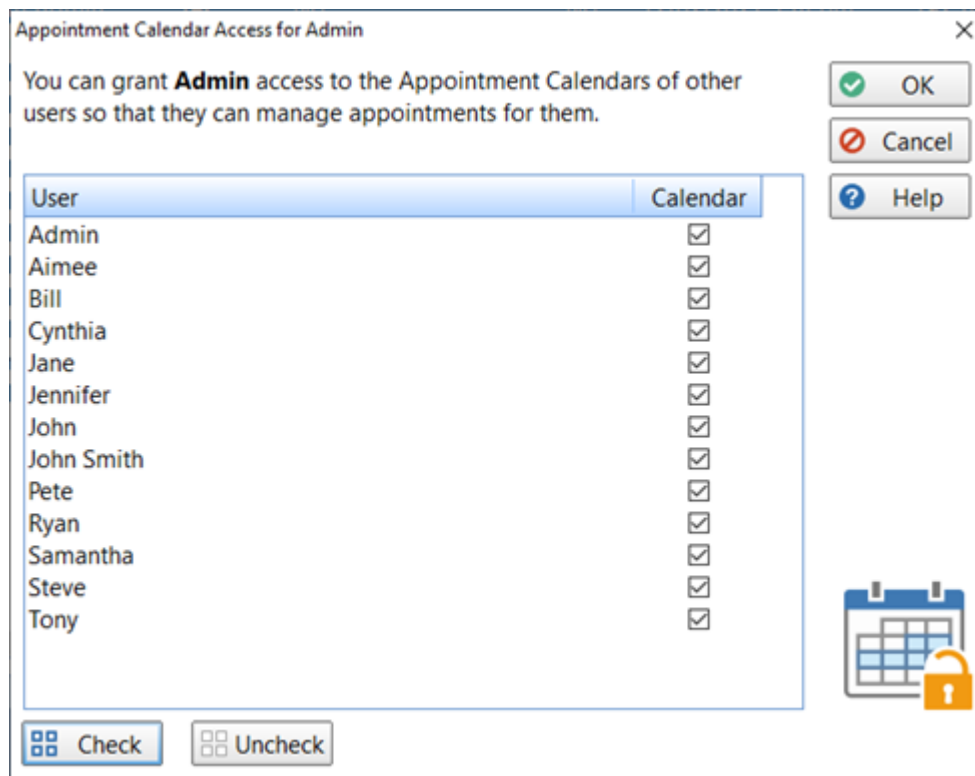
The table below shows the difference between the two.

Feature	Manager	System Administrator
User Management	★	★
Manage Groups	★	★
Label Editor	★	★
Manage Lookup Lists	★	★
Message Archives	★	★
Archive Messages	★	★
Overview	★	★
Master View	★	★
Reports	★	★
Automatic Backup		★
Backup		★
Backup Logs		★
Repair		★

System Rules		
Communication Settings		
Notifications		
View Server Logs		
Logout Users		
Broadcast		
Server Updates		
Remote Accesses		
System Maintenance		
Server Sessions		
Log Viewer		
Speed Test		
SQL Performance		
MessageSender Settings		

Setting Appointment Calendar Permissions

Before users can access another user's Appointment Calendar, they need to be give permission via this screen.



Access is given by setting each user's check box to checked (or unchecked to remove access).

External Users

If you have people in your business that need to receive phone messages but they don't generally access workstations then setting them up as an external user may be the answer.

External users don't have a user account so they are unable to login to PhonePad, but they can receive their messages by email, SMS and/or Pushover via MessageSender.

Select the **Manager** tab on the toolbar and click the **External Users** button, or select **External Users** from the **Manager** menu.

External Users

Phone and text messages can be sent to staff that don't have a user account by adding them to the **External Users** list. This requires **MessageSender**.

Name	Email	Mobile/Cell Number	Pushover Device
Aimee	aimee@fluffyrabbitco.com		aimee_iphone
Beatrice	beatrice@fluffyrabbitco.com		
Jamie	jamie@fluffyrabbitco.com	8665554321	
Mike	mike@fluffyrabbitco.com	8665551234	mike_iphone

Add

Edit

Delete

Import

Refresh

Close

Help

Search:

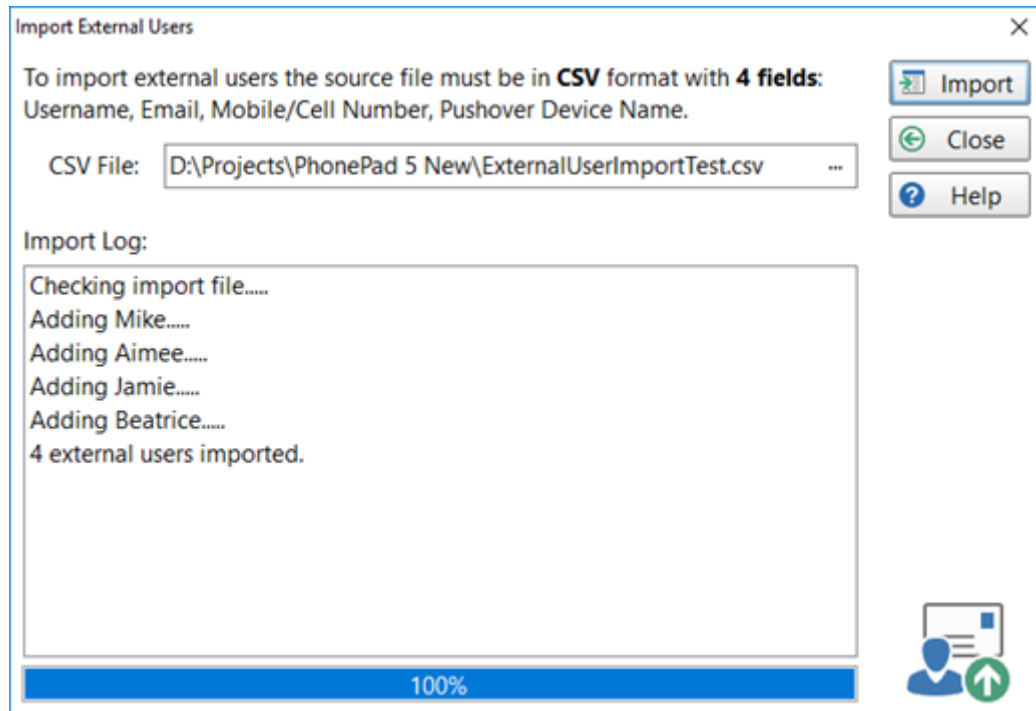
Add	Add a new external user.
Edit	Edit the selected external user.
Delete	Delete the selected external user.
Import	Import and/or update a batch of external users.
Refresh	Refresh the list of users.
Close	Close the External Users window.
Help	Access online help.
Search	The Search option allows you to search for users in the list, which can be handy if the list is large.



You need **MessageSender** installed for the External Users feature to work.

Importing External Users

If you have a lot of external users then you can import them from a CSV file.



The import file is expected to be in a specific format:

"Name","Email Address",Mobile/Cell Phone Number", "Pushover Device Name"

For example:

"John Smith","john@fluffyrabbitco@.com","1234567890","John_iPhone"

Not all fields need to have data but you still need to include all 4 fields - just make them empty.

For example:

"John Smith","john@fluffyrabbitco@.com","",""

Importing

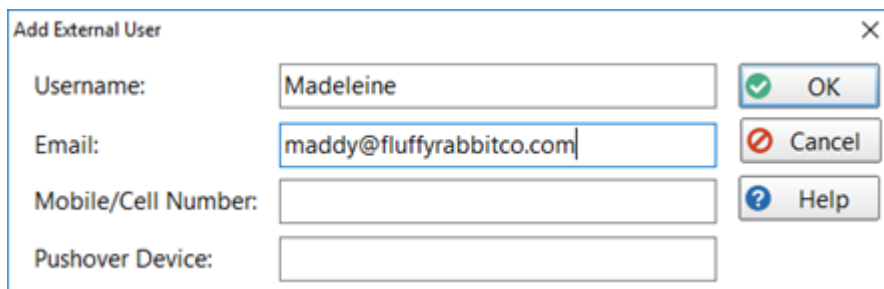
To import external user, select a compatible CSV file (one user per line) and then click the **Import** button.

If a user in the import list doesn't exist in the system then they will be added.

If a user in the import list already exists in the system then their details will be updated.

Adding an External User

To add an external user click the **Add** button on the **External Users** window.



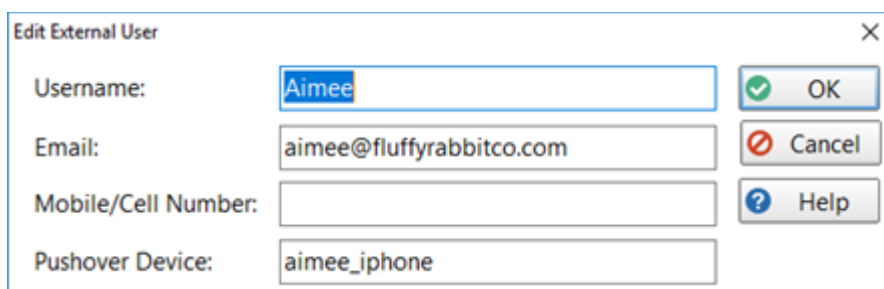
Not all fields need to be filled in but you will need at least a Username.

If the other fields are all blank then no messages will be sent to the user.

Username	This field is mandatory.
Email	Enter an email address if you want the external user to receive their messages by email.
Mobile/Cell Number	Enter a mobile/cell phone number if you want the external user to receive their messages by SMS (note that MessageSender requires an SMS Gateway account for this feature).
Pushover Device	Enter a Pushover device name if you want the external user to receive their messages by Pushover (note that MessageSender requires a Pushover account for this feature).

Editing an External User

To add an external user click the **Edit** button on the **External Users** window.



Make the changes you want and then click **OK**.

Username	This field is mandatory.
Email	Enter an email address if you want the external user to receive their messages by email.
Mobile/Cell Number	Enter a mobile/cell phone number if you want the external user to receive their messages by SMS (note that MessageSender requires an SMS Gateway account for this feature).
Pushover Device	Enter a Pushover device name if you want the external user to receive their messages by Pushover (note that MessageSender requires a Pushover account for this feature).

Sending Messages to External Users

When logging phone or text messages, external users will have their username prefixed with the AT symbol (@).

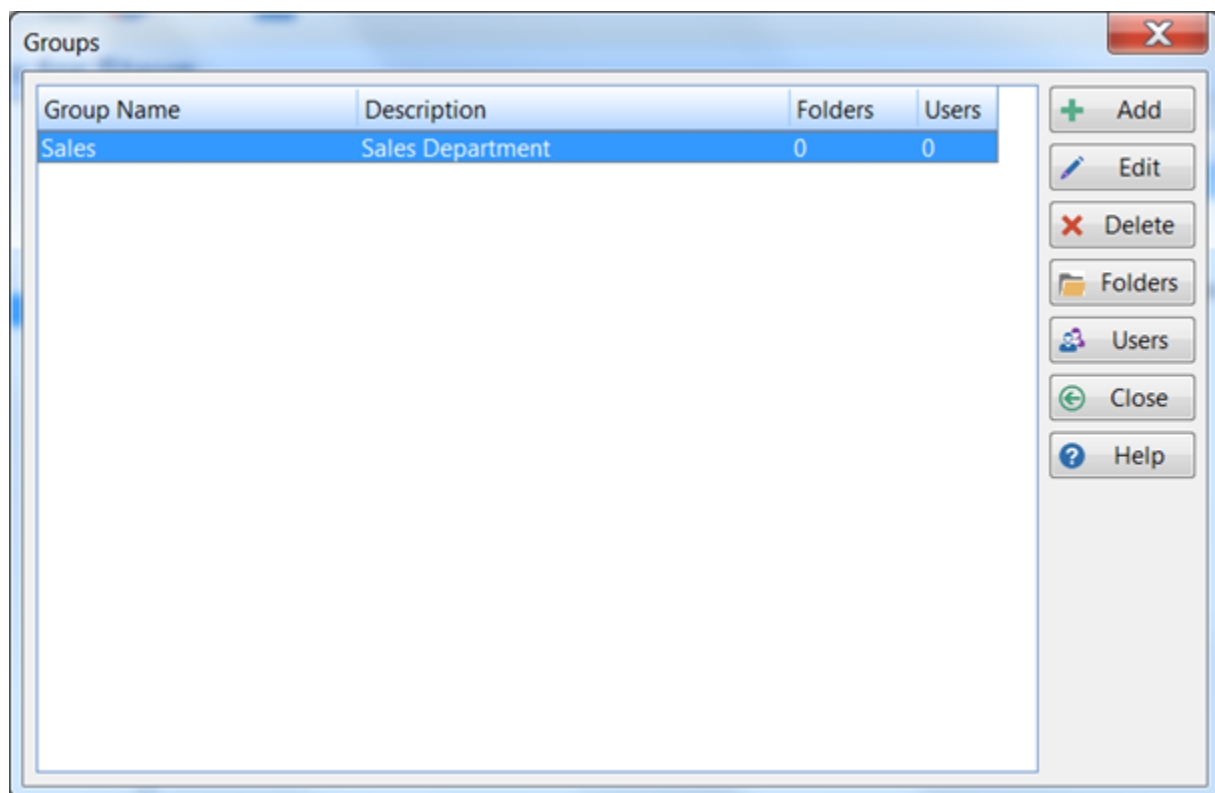
When you send messages to external users these message don't go into an Inbox. They are placed directly on the Automatic Message Forwarding queue and sent via email, SMS and/or Pushover.

Setting Up Groups

Groups provide an easy way to organize folders, messages and users. Once you have created a group, you can add any number of folders to it. Each folder can contain messages that only group members can access.

A nice feature of groups is that messages can be sent to a group rather than individual users. All members of the group will receive the messages.

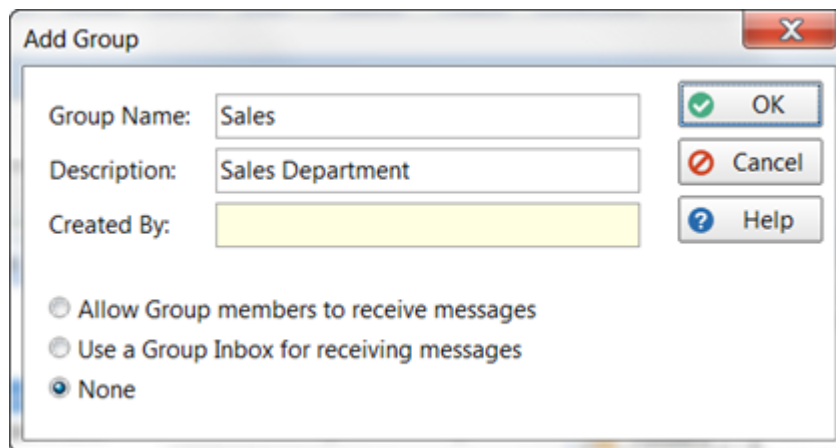
Select the **Manager** tab on the toolbar and click the **Manage Groups** button, or select **Manage Groups** from the **Manager** menu.



This window shows how many folders and users each group has.

Adding a Group

To add a group, click the **Add** button.



In the example we are creating a group for a fictitious Sales department.

There are 3 options:

- **Allow Group members to receive messages** - when selected, any messages addressed to the group will be sent to all members of the group.
- **Use a Group Inbox for receiving messages** - when selected, PhonePad will create an Inbox for the group. Any messages addressed to the group will be sent to the Group Inbox. Members of the Group will automatically be given access to the Group Inbox.
- **None** - when selected, groups cannot receive messages.

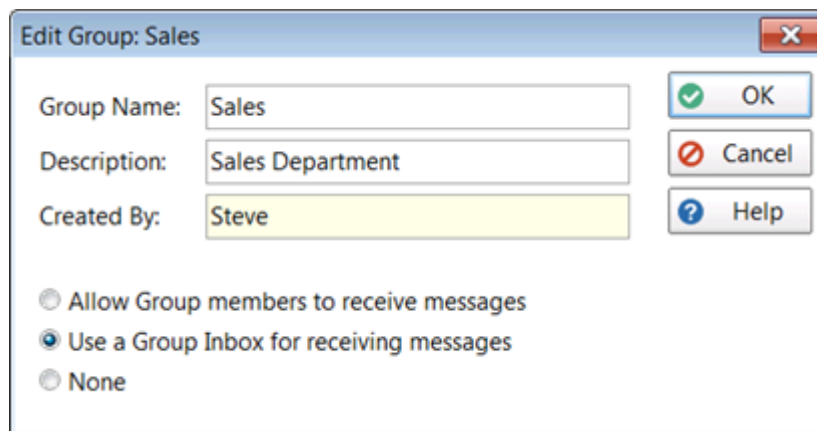
Click **OK** to finish creating the group.



If the **Use a Group Inbox for receiving messages** option is selected, you will need to add at least one user to the group before the group will appear in the TO field in messages.

Editing a Group

To edit a Group, select it from the list of groups and click the **Edit** button.



Dialog box titled "Edit Group: Sales".

Fields:

- Group Name: Sales
- Description: Sales Department
- Created By: Steve

Buttons:

- OK
- Cancel
- Help

Options:

- ☐ Allow Group members to receive messages
- ☒ Use a Group Inbox for receiving messages
- ☐ None

There are 3 options:

- **Allow Group members to receive messages** - when selected, any messages addressed to the group will be sent to all members of the group.
- **Use a Group Inbox for receiving messages** - when selected, PhonePad will create an Inbox for the group. Any messages addressed to the group will be sent to the Group Inbox. Members of the Group will automatically be given access to the Group Inbox.
- **None** - when selected, groups cannot receive messages.

Click **OK** to finish editing the group.



If the **Use a Group Inbox for receiving messages** option is selected and you change it to one of the other options, the Group Inbox and all of the messages it contains will be deleted when you click the **OK** button.

Deleting a Group

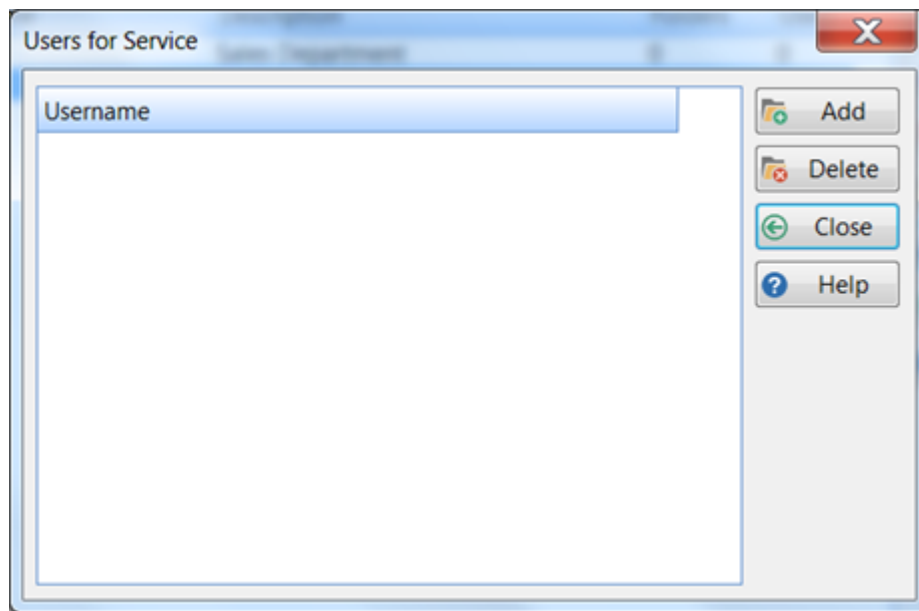
To delete a Group, select it from the list of groups and click the **Delete** button.



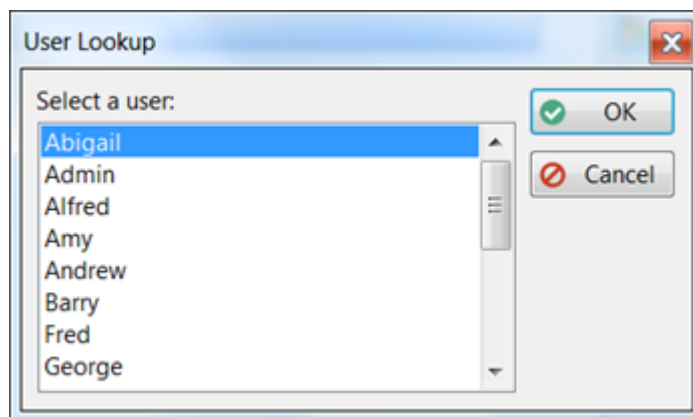
Deleting a Group will also delete all Group folders and all messages those folders contain. It will also delete the Group Inbox if it exists.

Adding a User to a Group

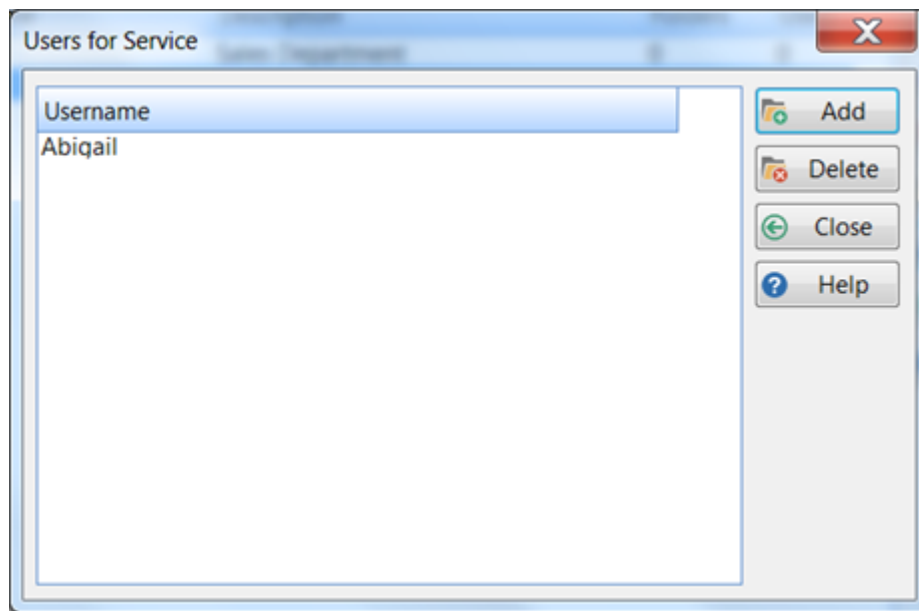
Click the **Users** button.



Click the **Add** button.



Select a user from the **User Lookup** list and click **OK**.



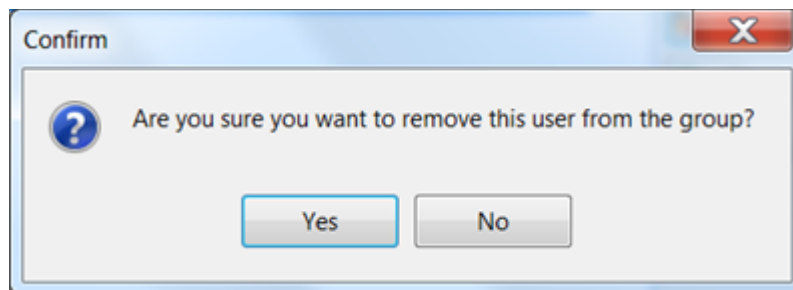
Repeat the above steps to add more users.

Note: Users can belong to multiple groups.

Removing a User from a Group

Select the user and click the **Delete** button.

You will be asked to confirm the removal.



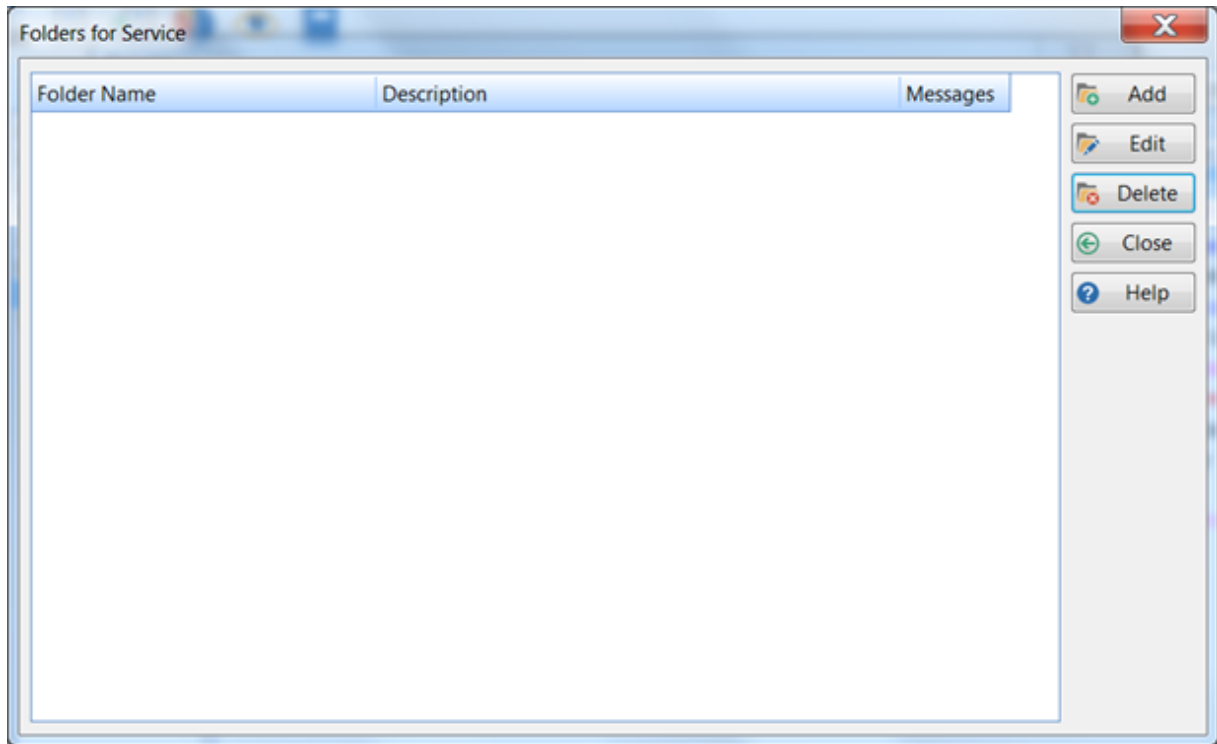
Click **Yes** to remove the user.

Group Folders

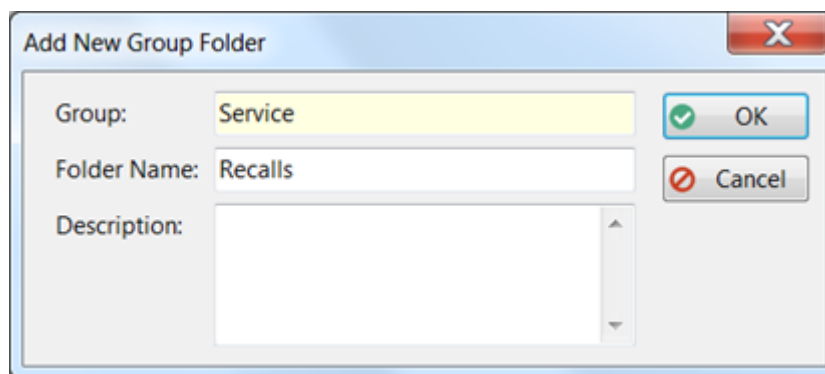
Each Group can have an unlimited number of group folders. Only users with Group membership will be able to access these folders.

Adding a Group Folder

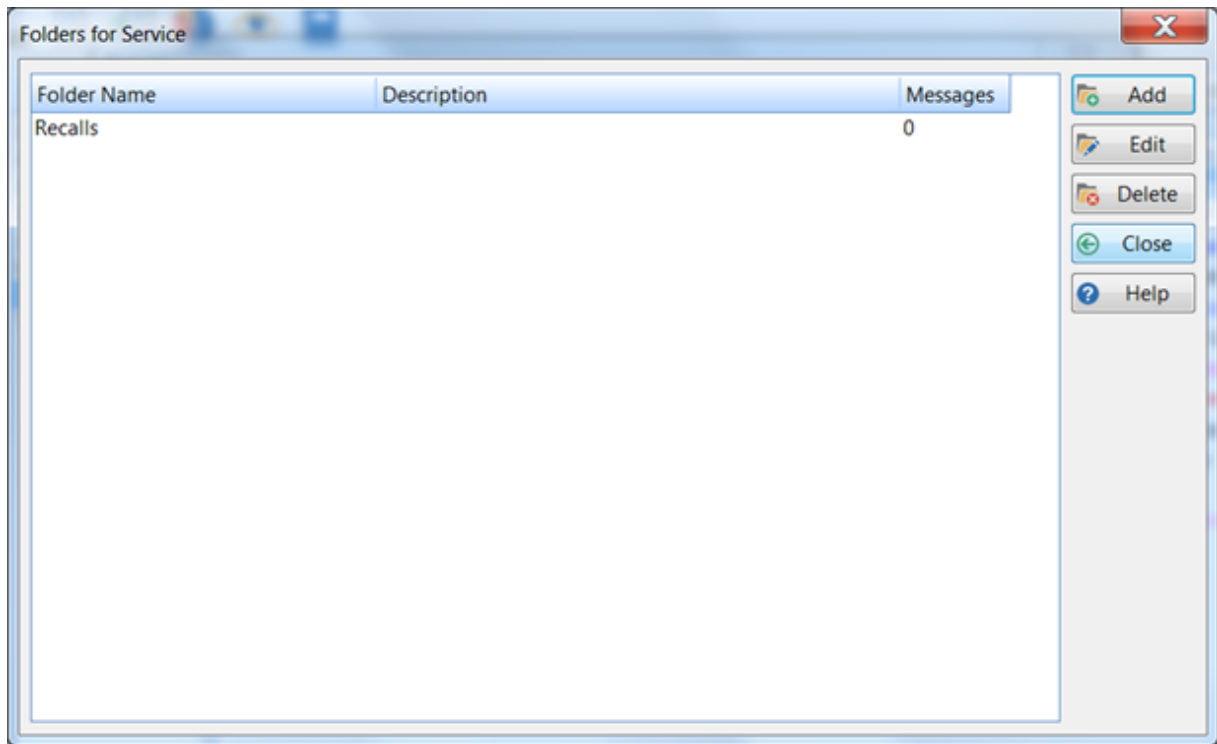
Select the group and then click the **Folders** button. This window displays all of the folders for this group, as well as how many messages each folder contains and how many users



Click the **Add** button to add a folder.

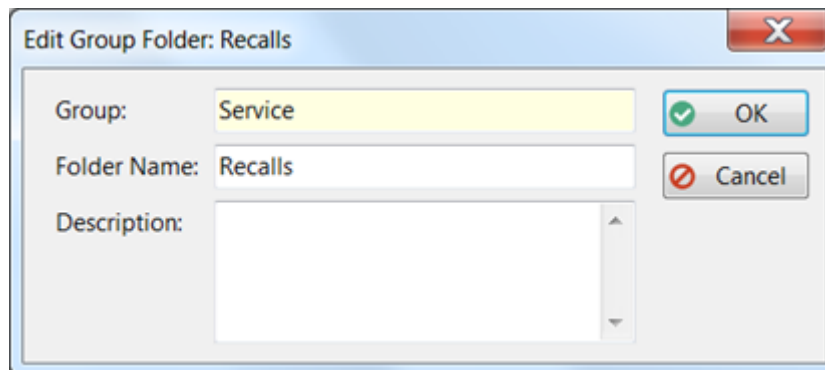


Enter a **Folder Name**, and optionally a **Description**, then click **OK**.



Editing a Group Folder

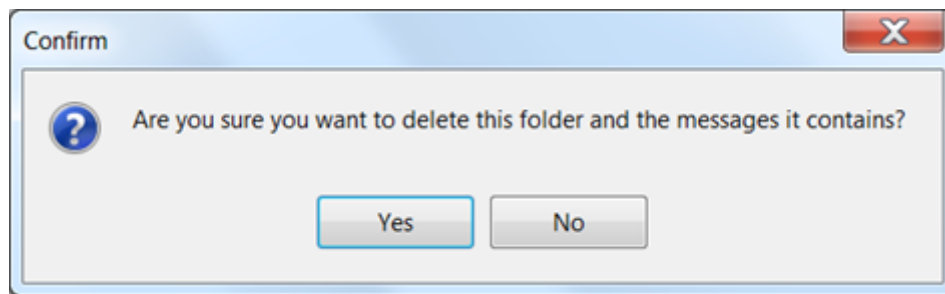
Select the group folder to edit and click the **Edit** button, or double-click on the folder.



Change the **Folder Name** and/or **Description**, then click **OK** to save the changes.

Deleting a Group Folder

Select the group folder and click the Delete button. You will be asked to confirm the deletion.



Important: Deleting a group folder will also delete any messages it contains.

Customizing Labels

Many of the labels that appear on a phone message form can be customized using the Label Editor. These are system-wide settings so they apply to all users.

Select the **Manager** tab on the toolbar and click the **Label Editor** button, or select **Label Editor** from the **Manager** menu.

Phone Message Form Label Editor

Preview

While You Were Out

To: Mary

Caller: John Smith

Company: XYZ Corporation

Date: 12/12/2002

Time: 11:04 am

Phone: 555 9999

Category:

Details:

Action:

☐ Will be in at

Custom 1:

Custom 2:

Email:

D.O.B:

Subject: Re: Meeting on Tuesday.

Reference: #123456

Attachments:

Message:

Taken by: Aimee

Label Editing

Message Title: While You Were Out

To: To

Caller: Caller

Company: Company

Category: Category

Details: Details

Action: Action

Will be in at: Will &be in at

You can edit the labels by typing in the fields in the Label Editing area at the bottom part of the screen. The labels will change as you type in the fields.

Not all label fields can appear on the screen at once so you may need to scroll the field into view using the scrollbar.

Label Editing

Company: Company

Category: Category

Subject: Subject

Message: Message

Taken By: Taken by

Reference: Reference

Message Details: Message Details

&Phoned: &Phoned

&Returned your call: &Returned your call

Scrollbar

You can either select the tab that contains the field you want to edit, or click on the field in the **Preview** area and it will take you straight to the field.

Instead of scrolling through the fields trying to find the right field to edit, simply click on the label you want to edit. The scrolling area in the **Label Editing** area will jump to the correct field.

If you really mess things up and want to start again, click the **Defaults** button. The labels will revert to their original values.

Special Fields

There are some special fields which can be "turned on and off".

The screenshot shows the 'Label Editing' window. It contains several fields with checkboxes and a dropdown menu for field types.

Field Name	Field Value	Field Type
Will be in at:	Will &be in at	
<input checked="" type="checkbox"/> Custom Field 1:	Custom 1	Custom 1 Type: Edit Field
<input checked="" type="checkbox"/> Custom Field 2:	Custom 2	Custom 2 Type: Edit Field
<input checked="" type="checkbox"/> Date of Birth		
<input checked="" type="checkbox"/> Email Address		
Subject	Subject	

The dropdown menu for field types is open, showing the following options:

- Edit Field (selected)
- Drop-Down List
- Message

To display these fields on the phone message form, you will need to check the checkbox next to the field name:

- Custom Field 1
- Custom Field 2
- Date of Birth
- Email Address

The two custom fields can be further customized by selecting the *type of field*:

- Edit Field.
- Drop-Down List.

If you select **Edit Field**, then free text can be entered into the field on the phone message form.

If you select **Drop-Down List** then users can select from a list of options (you will need to set the list items under Manage Lookup Lists). This gives you tighter control on what they can enter.



Some of the labels displayed in phone messages are also displayed in the column heading titles of message lists, eg. Caller, Company. If you change these labels the changes will also be shown in the relevant column heading titles.

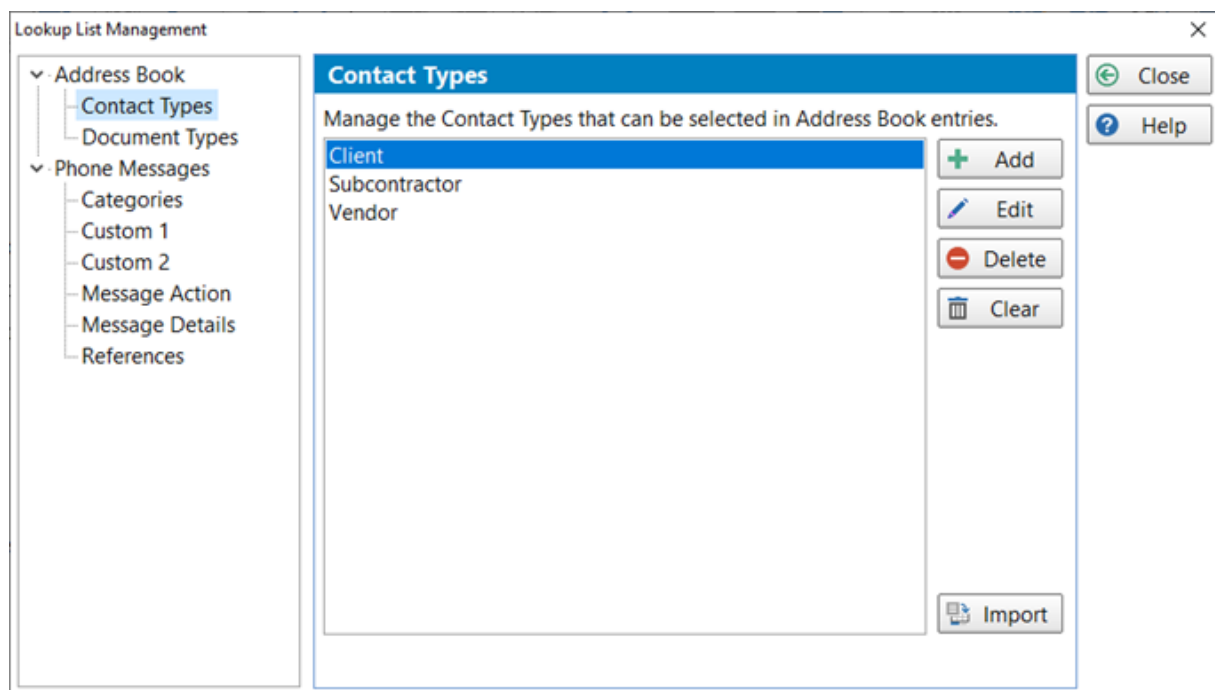


Important: Be aware of the length of the labels you enter. If they are too long for the available space they will be clipped or may just look really odd.

Managing Lookup Lists

Use the **Manage Lookup Lists** option to maintain the look up lists used in PhonePad 5.

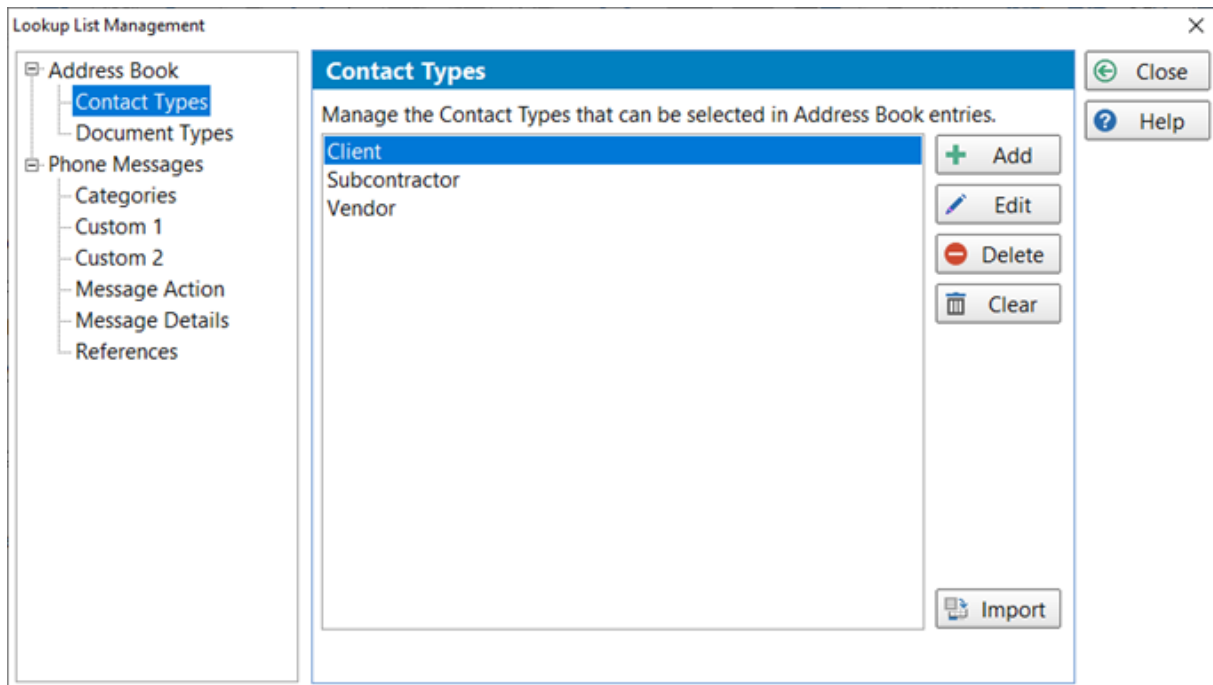
Select the **Manager** tab on the toolbar and click the **Maintain Lookup Lists** button, or select **Maintain Lookup Lists** from the **Manager** menu.



There are eight lookup lists that you can maintain using the **Maintain Lookup Lists** option: Contact Types, Document Types,, Categories, Custom 1, Custom 2, Message Action, Message Details and References.

Contact Types

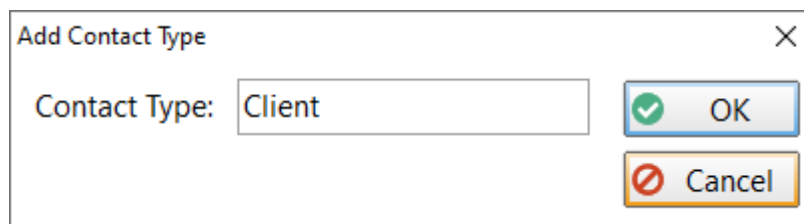
These can be used to categorize Address Book entries, eg. Patients, Clients, Reps, etc.



- Add** Add a new Contact Type.
- Edit** Edit the selected Contact Type.
- Delete** Delete the selected Contact Type.
- Clear** Delete all Contact Types.
- Import** Import Contact Types from a text file.

Add a Contact Type

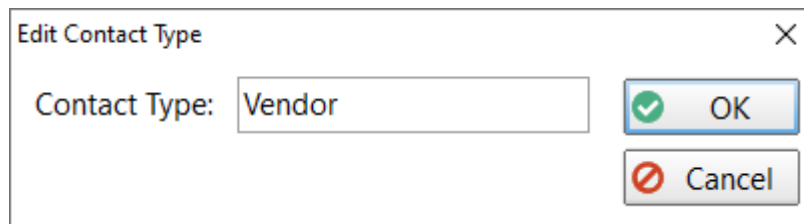
To add a new Contact Type, click the **Add** button.



Enter a **Contact Type** and click **OK**.

Edit a Contact Type

To edit a Contact Type, select it from the list and click the **Edit** button, or double-click the Contact Type.



Change the **Contact Type** and then click **OK**.

Delete a Contact Type

To delete a **Contact Type**, select the **Contact Type** and then click the **Delete** button.

Clear All Contact Types

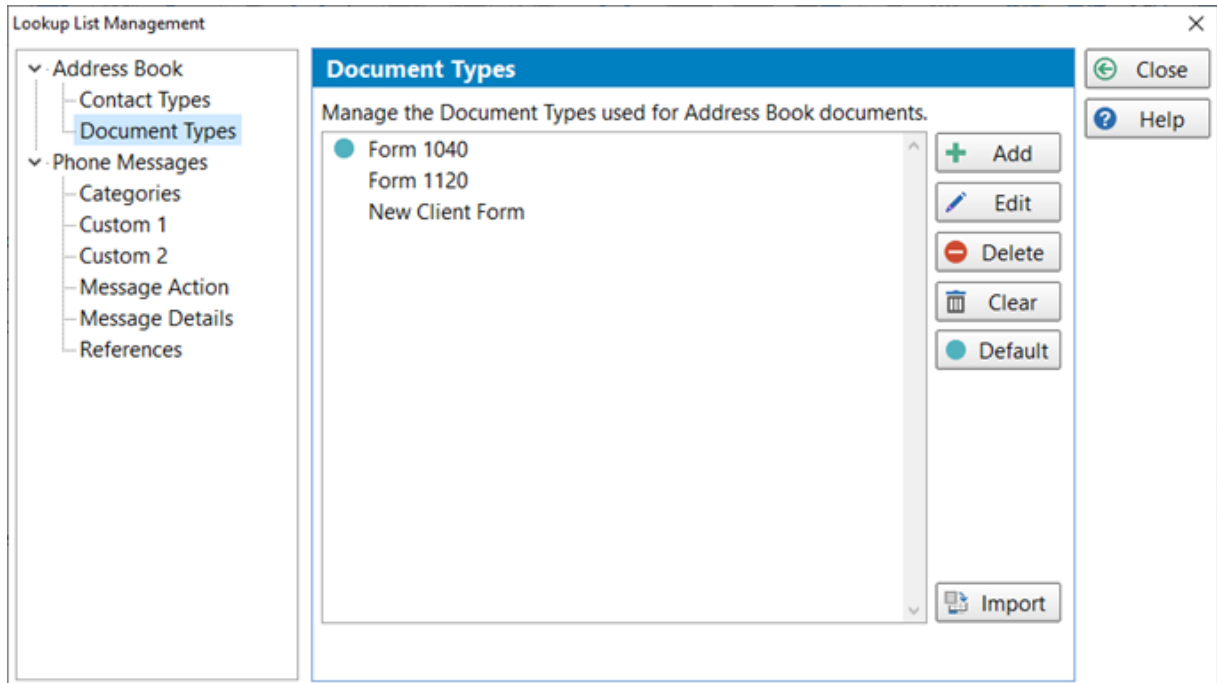
Click the **Clear** button to delete all contact types. You will be asked to confirm this operation.

Import Contact Types

Click the **Import** button to import a list of contact types. The text file will need to have one contact type per line with no delimiters.

Document Types

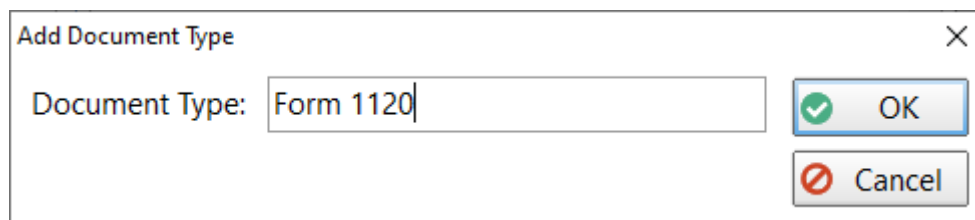
Document Types can be used to categorize documents added to a contact's documents in the Address Book.



- Add** Add a new Document Type.
- Edit** Edit the selected Document Type.
- Delete** Delete the selected Document Type.
- Clear** Delete all Document Types.
- Default** Select a Document Type to be the default.
- Import** Import Document Types from a text file.

Add a Document Type

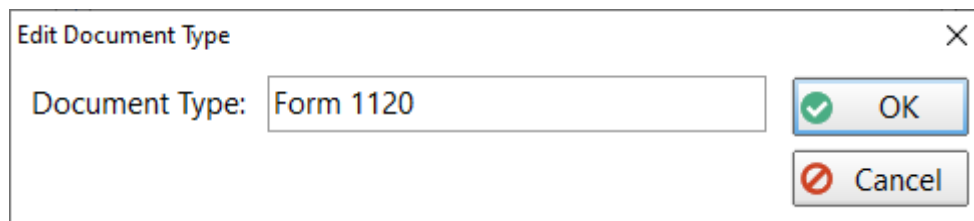
To add a new **Document Type**, click the **Add** button.



Enter a **Document Type** and click **OK**.

Edit a Document Type

To edit a **Document Type**, select it from the list and click the **Edit** button, or double-click the **Document Type**.



Change the **Document Type** and then click **OK**.

Delete a Document Type

To delete a **Document Type**, select the **Document Type** and then click the **Delete** button.

Clear All Document Types

Click the **Clear** button to delete all **Document Types**. You will be asked to confirm this operation.

Set a Default Document Type

When you add a new document in the Address Book, you can have it default to a **Document Type**.

To set a default **Document Type**, select the **Document Type** from the list and then click the **Default** button.

The default item is indicated by the cyan colored circle.

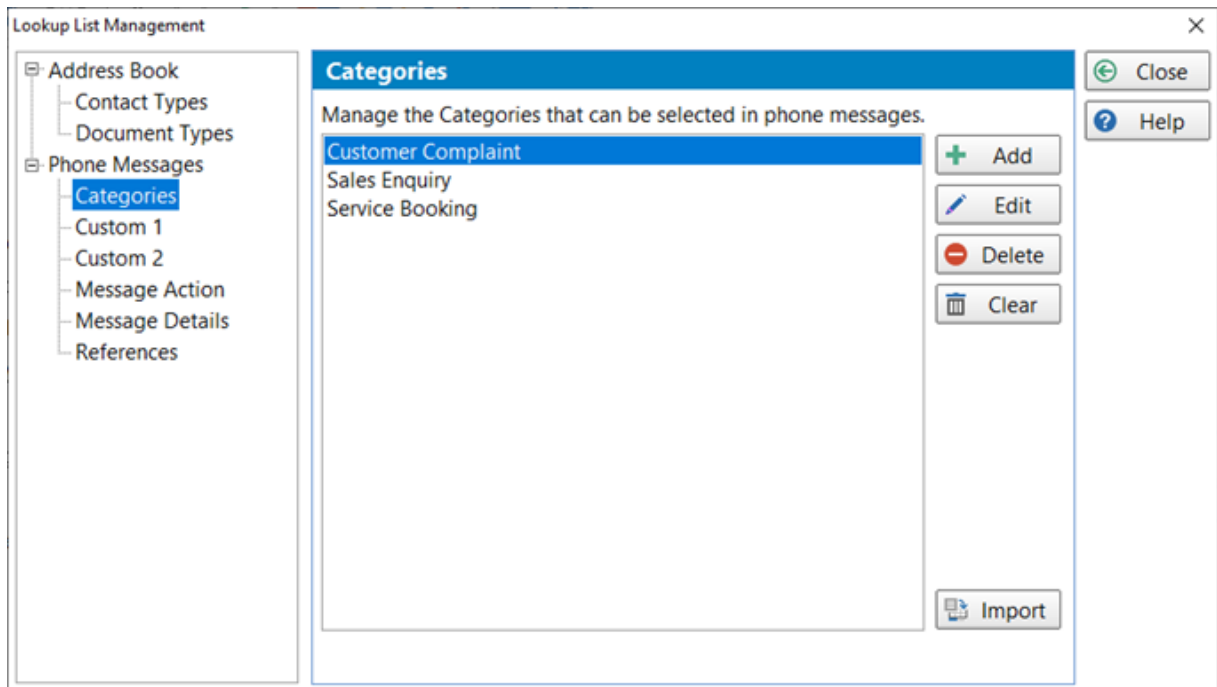


Import Document Types

Click the **Import** button to import a list of **Document Types**. The text file will need to have one **Document Type** per line with no delimiters.

Categories

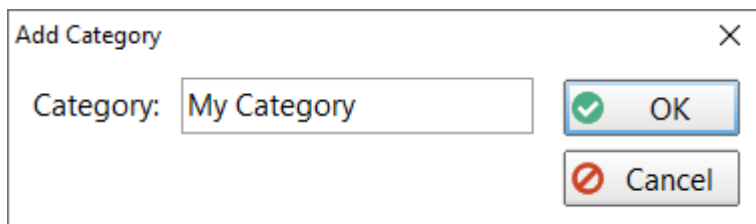
Categories can be used in messages to categorize your messages. You are free to use categories however you wish.



- Add** Add a new category
- Edit** Edit the selected category.
- Delete** Delete the selected category.
- Clear** Delete all categories.
- Import** Import categories from a text file.

Add a Category

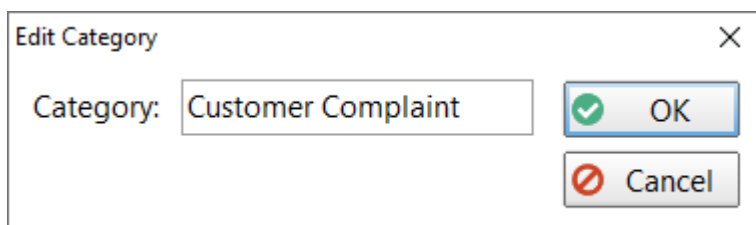
To add a new category, click the **Add** button.

A dialog box titled "Add Category" with a close button (X) in the top right corner. It contains a text input field labeled "Category:" with the text "My Category" entered. To the right of the input field are two buttons: "OK" with a green checkmark icon and "Cancel" with a red circle and slash icon.

Enter a **Category** and then click **OK**.

Edit a Category

To edit a Category, select it from the list and click the **Edit** button, or double-click the Category.

A dialog box titled "Edit Category" with a close button (X) in the top right corner. It contains a text input field labeled "Category:" with the text "Customer Complaint" entered. To the right of the input field are two buttons: "OK" with a green checkmark icon and "Cancel" with a red circle and slash icon.

Change the **Category** and then click **OK**.

Delete a Category

To delete a Category, select the Category and then click the **Delete** button.

Clear All Categories

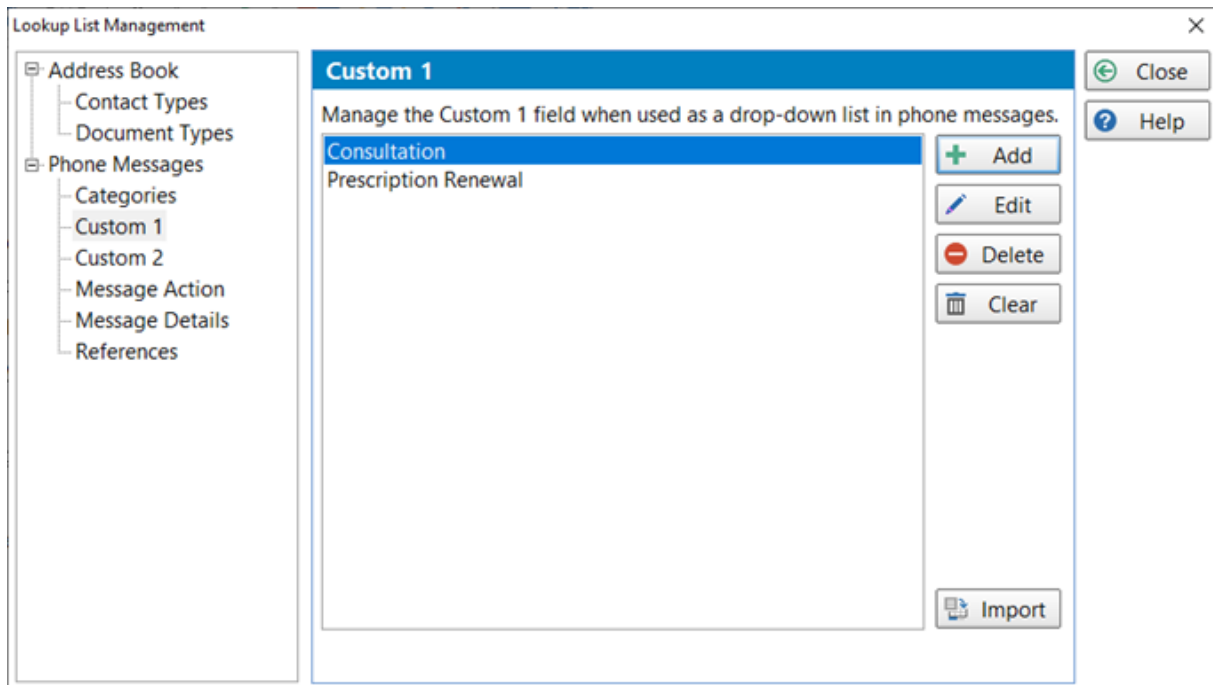
Click the **Clear** button to delete all categories. You will be asked to confirm this operation.

Import Categories

Click the **Import** button to import a list of categories. The text file will need to have one category per line with no delimiters.

Custom Field 1

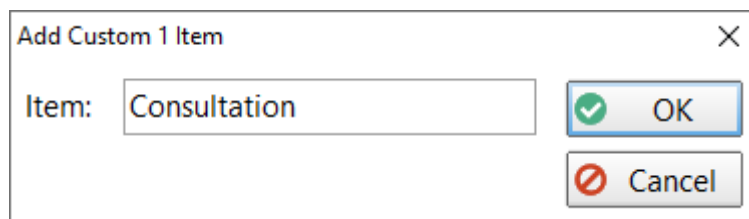
If you add Custom Field 1 with the field type of **Drop-Down List** to your phone message forms (using the Label Editor), you can add/edit/delete items in the list on this screen.



- Add** Add a new Custom item
- Edit** Edit the selected Custom item.
- Delete** Delete the selected Custom item.
- Clear** Delete all Custom items.
- Import** Import Custom items from a text file.

Add a Custom Field 1 Item

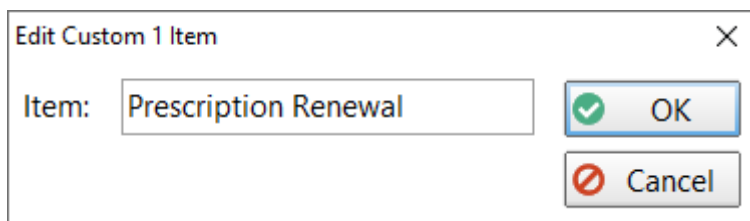
To add a new item, click the **Add** button.



Enter a **Item** and click **OK**.

Edit a Custom Field 1 Item

To edit an Item, select it from the list and click the **Edit** button, or double-click the Item.



Change the **Item** and then click **OK**.

Delete a Custom Field 1 Item

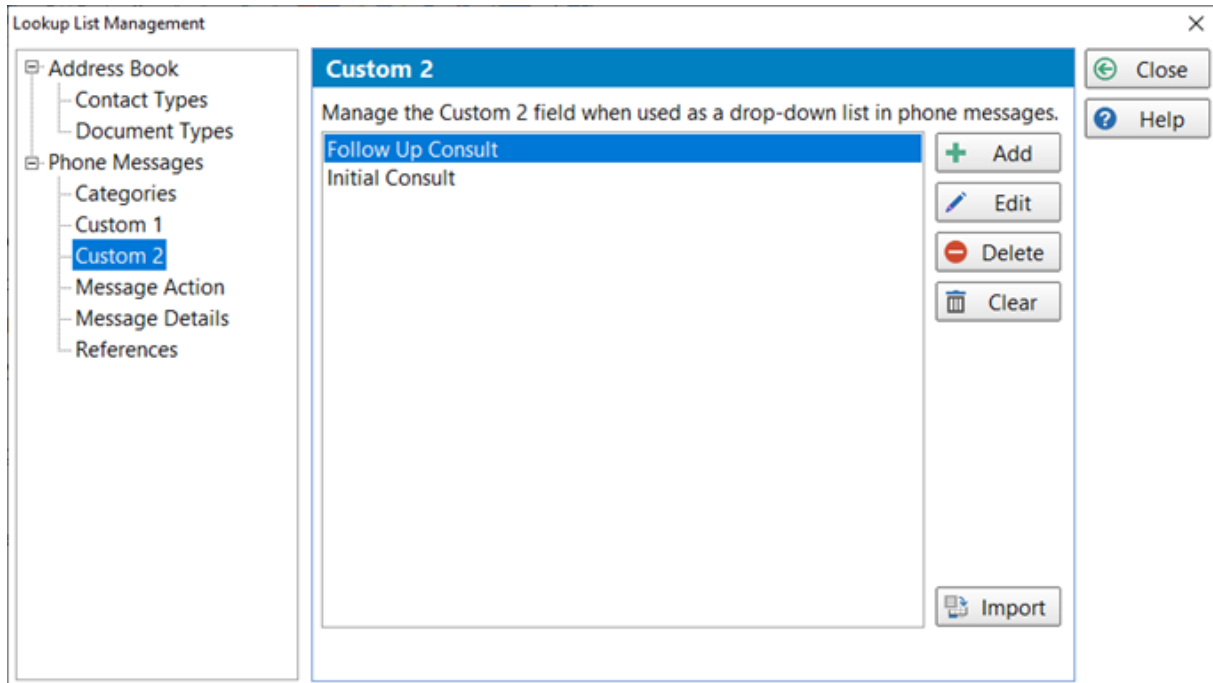
To delete an Item, select the Item and then click the **Delete** button.

Import Custom Field 1 Items

Click the **Import** button to import a list of Custom Field 1 items. The text file will need to have one item per line with no delimiters.

Custom Field 2

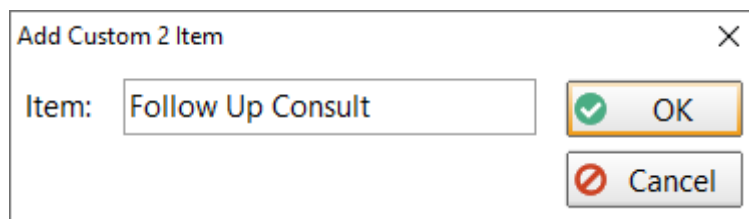
If you add **Custom Field 2** with the field type of **Drop-Down List** to your phone message forms (using the Label Editor), you can add/edit/delete items in the list on this screen.



- Add** Add a new Custom item
- Edit** Edit the selected Custom item.
- Delete** Delete the selected Custom item.
- Clear** Delete all Custom items.
- Import** Import Custom items from a text file.

Add a Custom Field 2 Item

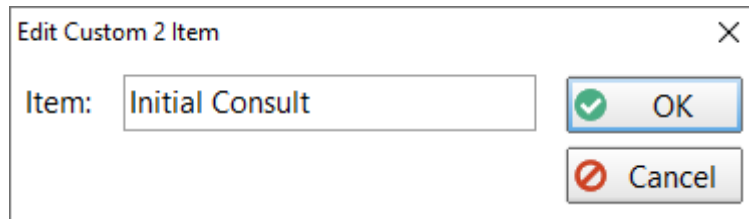
To add a new item, click the **Add** button.



Enter a **Item** and click **OK**.

Edit a Custom Field 2 Item

To edit an Item, select it from the list and click the **Edit** button, or double-click the Item.



Change the **Item** and then click **OK**.

Delete a Custom Field 2 Item

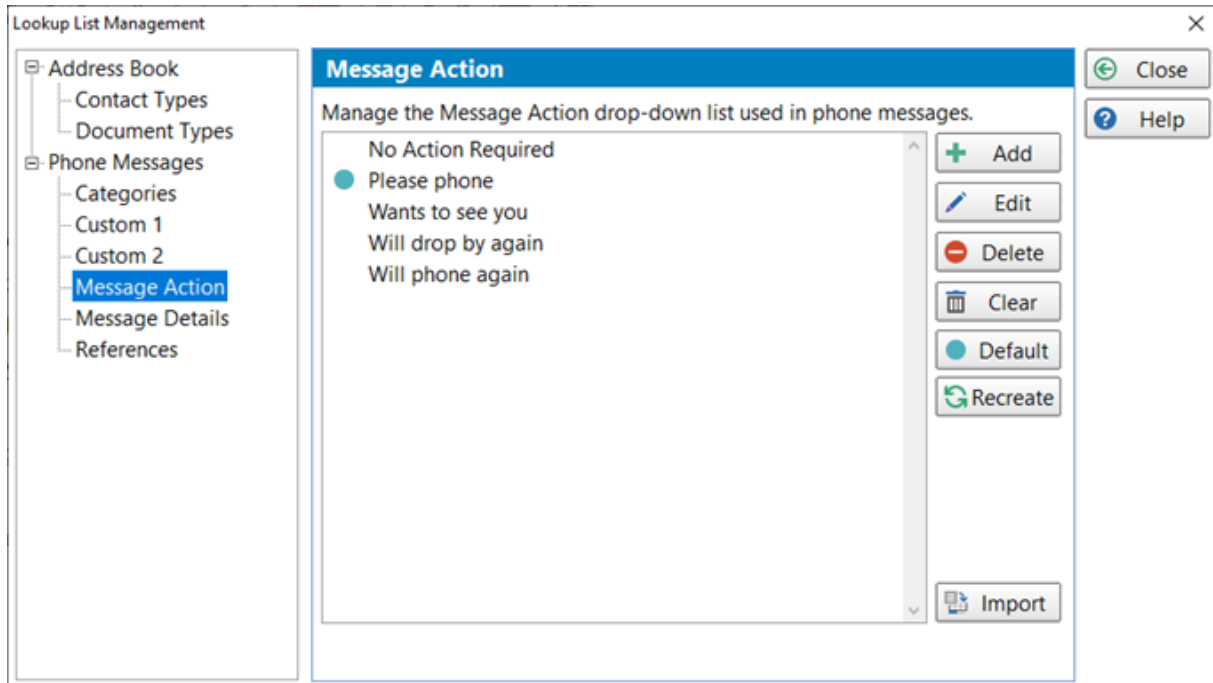
To delete an Item, select the Item and then click the **Delete** button.

Import Custom Field 2 Items

Click the **Import** button to import a list of Custom Field 2 items. The text file will need to have one item per line with no delimiters.

Message Actions

Message Actions are used on phone message forms. A number of default items have been created for you. You can use these items, add to them, delete them, or whatever you need



Add Add a new Message Action.

Edit Edit the selected Message Action.

Delete Delete the selected Message Action.

Clear Delete all Message Actions.

Default Select a Message Action to be the default.

Recreate So you've completely messed up the Message Actions and you want to go back to the original actions? This is the option you need.

Import Import Message Actions from a text file.

Message Action shown on the phone message form:

New Phone Message (Caller: Meagan Gallagher)

While You Were Out

To	Aimee,	Date:	
Caller	Meagan Gallagher	Time:	
Company:	Stanton Corp	Phone:	
Details:	Phoned	Category:	
Action:	No Action Required	<input type="checkbox"/> Private M	
		<input type="checkbox"/> Read Rec	
		<input type="checkbox"/> Follow up	
		<input type="checkbox"/> Urgent	

☐ Will be in at:

Add a Message Action

To add a new **Message Action**, click the **Add** button.

Add Action

Action: Hide in the Storeroom

OK Cancel

Enter an Action and then click **OK**.

Edit a Message Action

To edit a **Message Action**, select it from the list and click the **Edit** button, or double-click the item.

Edit Action

Action: Please phone

OK Cancel

Change the **Action** and then click **OK**.

Delete a Message Action

To delete a Message Action, select the Action and then click the **Delete** button.

Clear All Message Actions

Click the **Clear** button to delete all Message Actions. You will be asked to confirm this operation.

Set a Default Message Action

When you create a new phone message, you can have it default to a **Message Action**.

To set a default **Message Action**, select the **Message Action** from the list and then click the **Default** button.

The default action is indicated by the cyan colored circle.



Recreate Message Actions

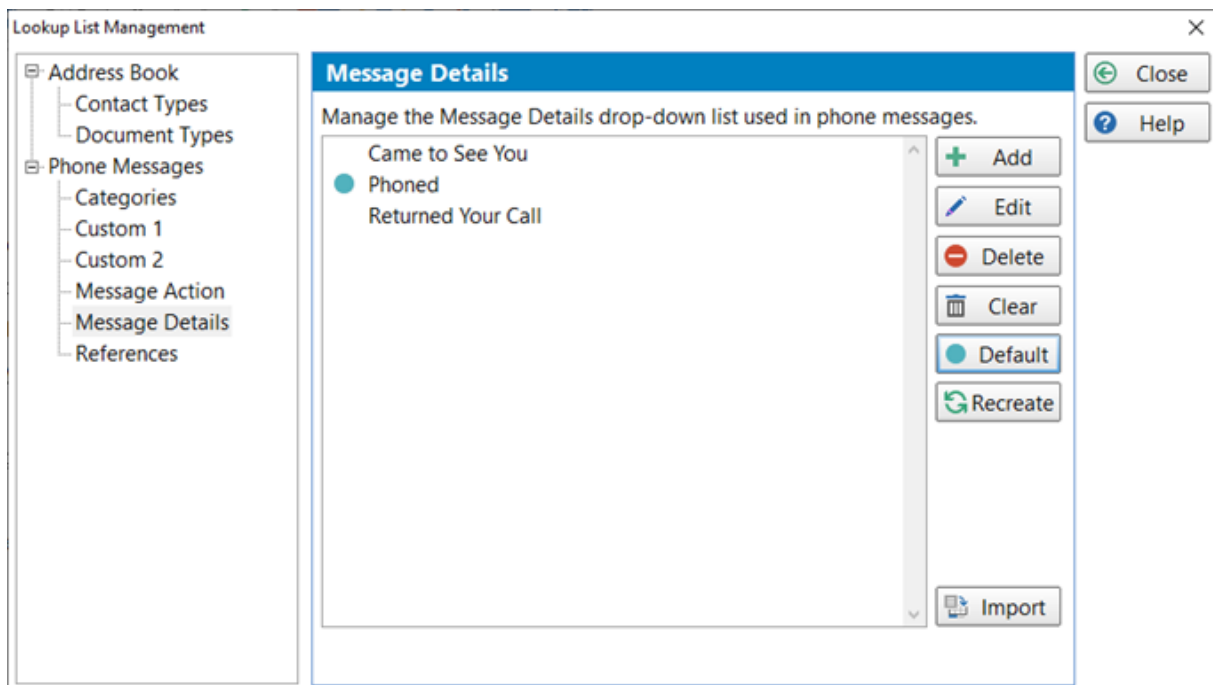
If you make a complete mess of the Message Actions and want to go back to the default items, click the **Recreate** button. It will clear all actions and restore the original ones.

Import Message Actions

Click the **Import** button to import a list of Message Actions. The text file will need to have one category per line with no delimiters.

Message Details

Message Details are used on phone message forms. A number of default items have been created for you. You can use these items, add to them, delete them, or whatever you need



Add Add a new Message Detail.

Edit Edit the selected Message Detail.

Delete Delete the selected Message Detail.

Clear Delete all Message Details.

Default Select a Message Detail to be the default.

Recreate So you've completely messed up the Message Details and you want to go back to the original details? This is the option you need.

Import Import Message Details from a text file.

Message Detail shown on the phone message form:

New Phone Message (Caller: Meagan Gallagher)

While You Were Out

To	Aimee,	Date:	
Caller	Meagan Gallagher	Time:	
Company:	Stanton Corp	Phone:	
Details:	Phoned	Category:	
Action:	No Action Required	<input type="checkbox"/> Private M	
<input type="checkbox"/> Will be in at:		<input type="checkbox"/> Read Rec	
		<input type="checkbox"/> Follow up	
		<input type="checkbox"/> Urgent	

Add a Message Detail

To add a new Message Detail item, click the **Add** button.

Add Detail

Detail: They're Here Now!!

OK Cancel

Enter an Item and then click **OK**.

Edit a Message Detail

To edit a **Message Detail**, select it from the list and click the **Edit** button, or double-click the item.

Edit Detail

Detail: Returned Your Call

OK Cancel

Change the **Detail** and then click **OK**.

Delete a Message Detail

To delete a Message Detail, select the item and then click the **Delete** button.

Clear All Message Details

Click the **Clear** button to delete all Message Details. You will be asked to confirm this operation.

Set a Default Message Detail

When you create a new phone message, you can have it default to a **Message Detail**.

To set a default **Message Detail**, select the **Message Detail** from the list and then click the **Default** button.

The default detail is indicated by the cyan colored circle.



Recreate Message Details

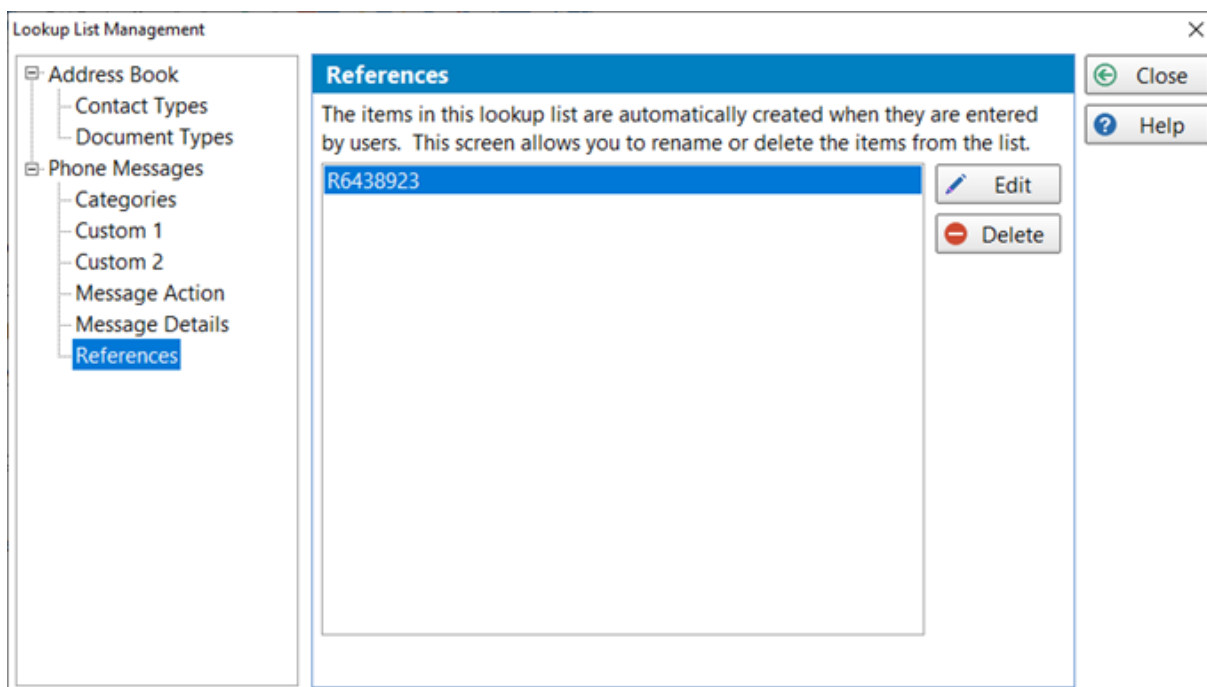
If the Message Details are missing, or if you just want to go back to the default items, click the **Recreate** button. It will clear all actions and restore the original ones.

Import Message Details

Click the **Import** button to import a list of Message Details. The text file will need to have one category per line with no delimiters.

References

Messages have a Reference field that you can enter any text into. It could be a client number, patient number, file number, or whatever you like. PhonePad remembers these references so that they can be used in other messages. These references can be maintained in this window.



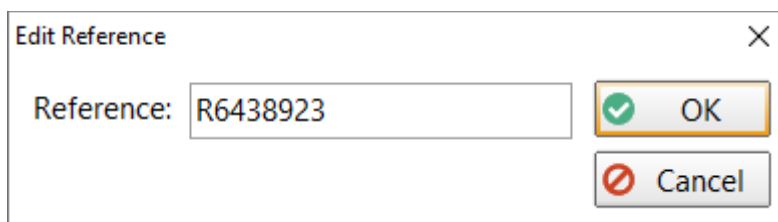
The Reference field can be renamed using the Label Editor.

Add a Reference

The Reference field in messages is a free form text field. When text is entered in this field it is automatically added into the system when the message is sent.

Edit a Reference

To edit a Reference, select it from the list and then click the **Edit** button, or double-click the Reference.



Change the Reference and click **OK**. This will change the Reference in all messages that have this Reference.

Delete a Reference

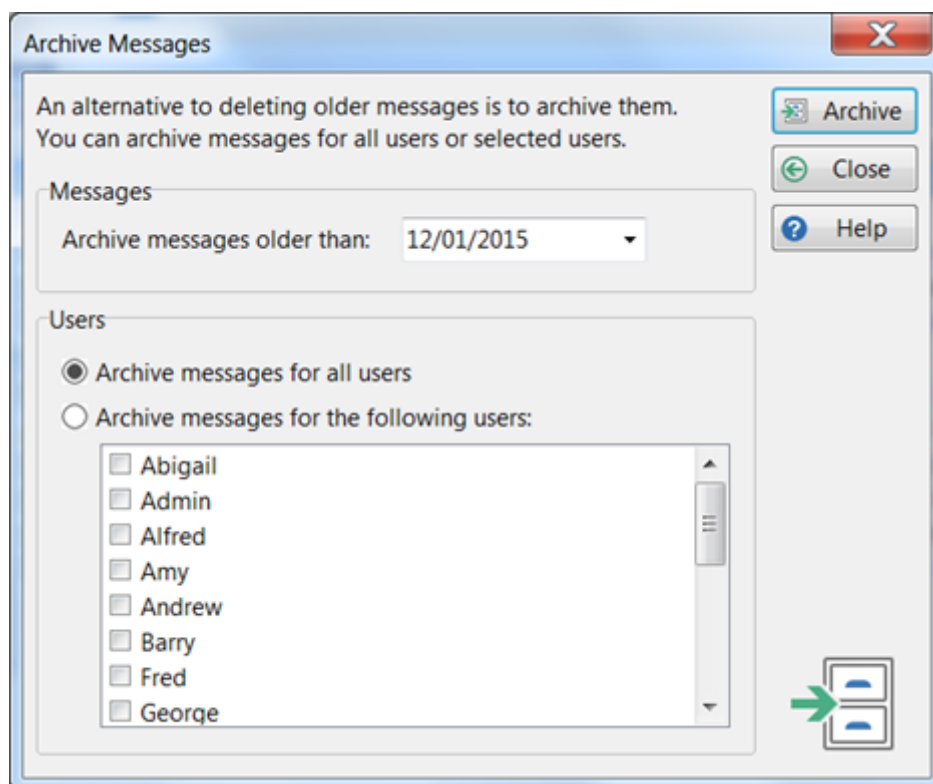
To delete a Reference, select it from the list and click the **Delete** button. The reference will be removed from all messages that have it.

Message Archiving

Your PhonePad database can literally hold millions of messages. Although you are unlikely to reach that number of messages you may want to archive some messages that you don't need to actively access.

Archiving Messages

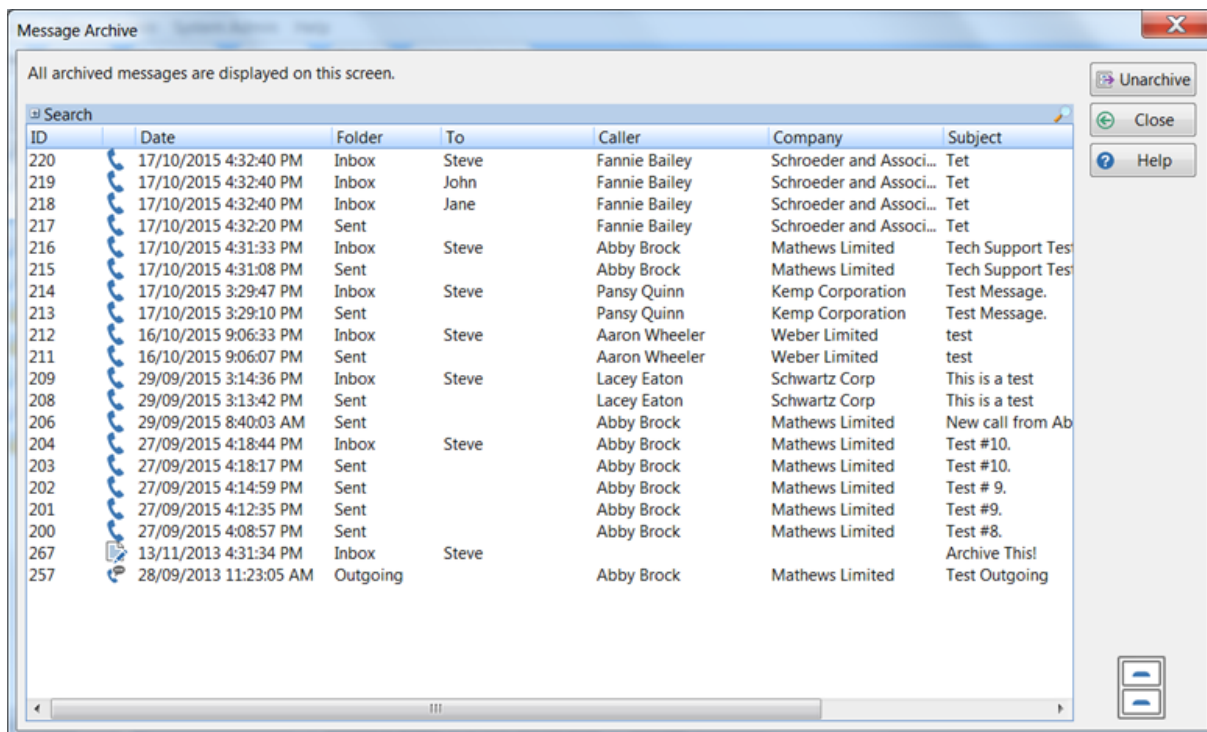
To archive messages, select the **Manager** tab on the toolbar and click the **Archive Messages** button, or select **Archive Messages** from the **Manager** menu.



Select a date to archive messages before that date. You can archive messages for all users, or selected users. Click the **Archive** button to archive the messages.

Unarchiving Messages

If you want to unarchive messages that have been archived, select the **Manager** tab on the toolbar and click the **Message Archives** button, or select **Message Archives** from the **Manager** menu.



Select the messages you want to unarchive and then click the **Unarchive** button.

You can use the Search function to find the messages you want to unarchive.

Managing the Chaos

The message management features of PhonePad enable you as a PhonePad Manager to keep on top of everything and to see what's happening with phone calls and messages within your business or organization.

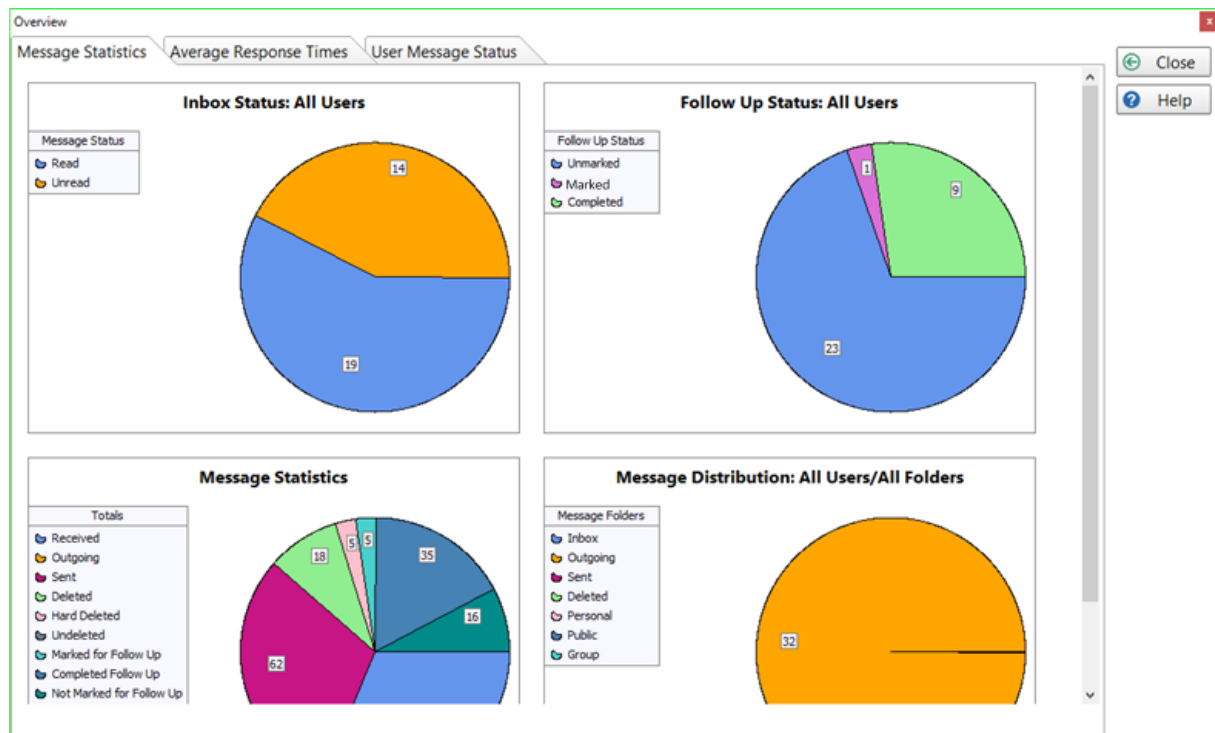
Message Overview

Overview gives you a graphical snapshot of the status of all messages in your PhonePad 5 system. For example, at a glance you can see how many messages are sitting unread in Inboxes, the number of messages waiting to be followed up, and so on.

Select the **Manager** tab on the toolbar and click the **Overview** button, or select **Overview** from the **Manager** menu.

Message Statistics

Select the Message Statistics tab to view the current status of messages:



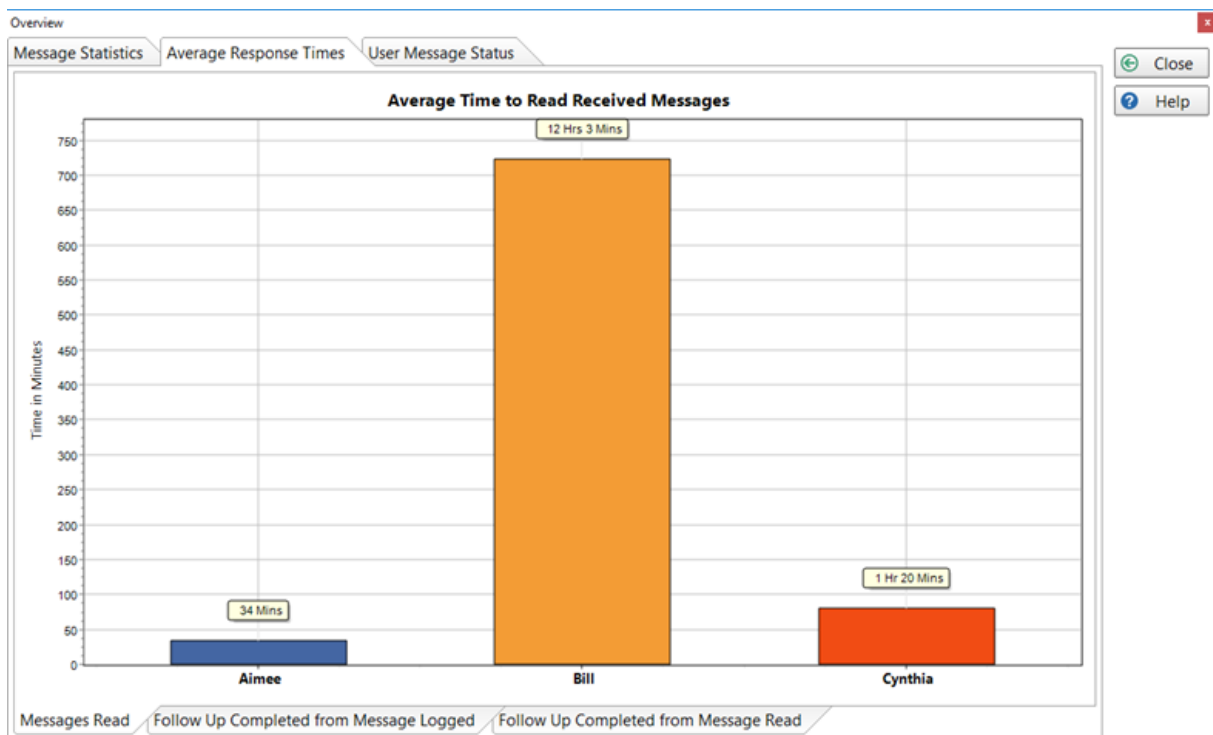
Inbox Status: All Users	Shows the total number of read and unread messages in all Inboxes.
Follow Up Status: All Users	Shows the total number messages that have a follow up status of Unmarked, Marked and Completed.
Message Statistics	Shows the total number of messages for each message status.
Message Distribution: All Users/All Folders	Shows the distribution of messages across all folders in the system, regardless of user. You can see how many messages are stored in each type of folder.

Average Response Times

These charts show the average response times relating to follow ups.

Message Read

This graph shows, on average, how long each user has taken to read received messages.



You can use the left mouse button to drag the graph left and right.

Follow Up Completed from Message Logged

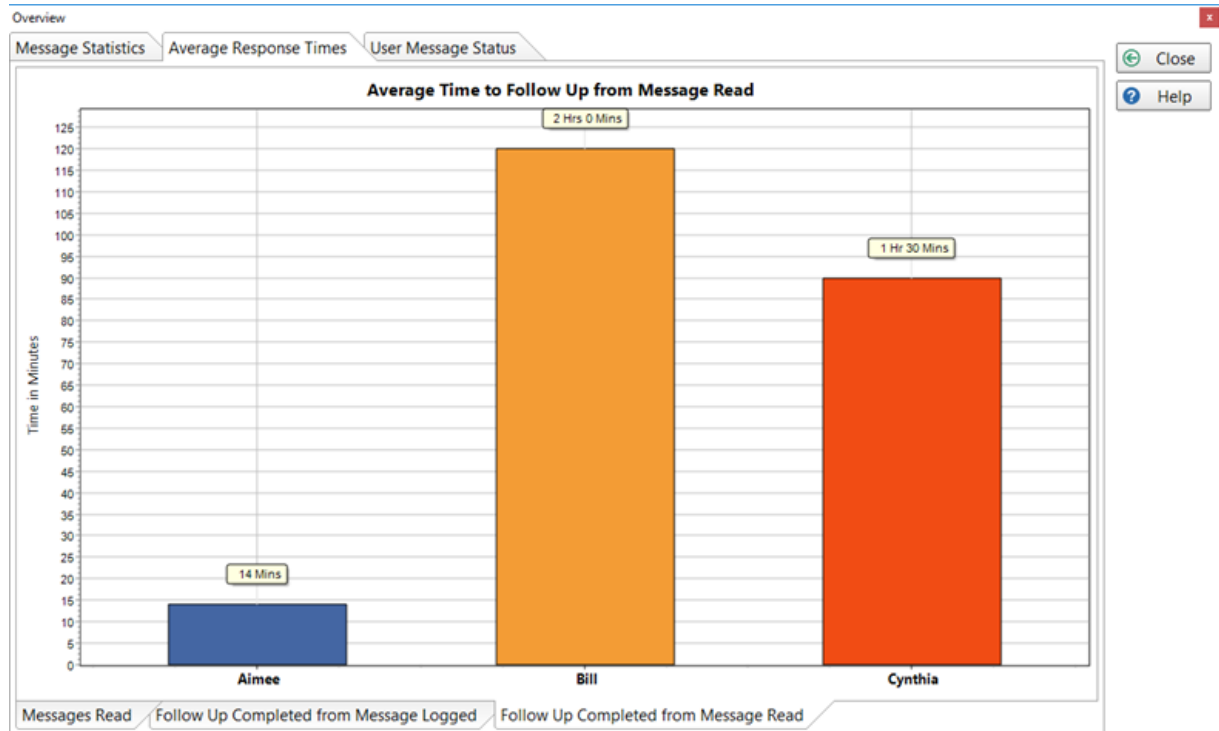
This graph shows, on average, how long each user has taken to complete a follow up from the time the message was logged.



You can use the left mouse button to drag the graph left and right.

Follow Up Completed from Message Read

This graph shows, on average, how long each user has taken to complete a follow up from the time the message was opened by them.



You can use the left mouse button to drag the graph left and right.

User Message Status

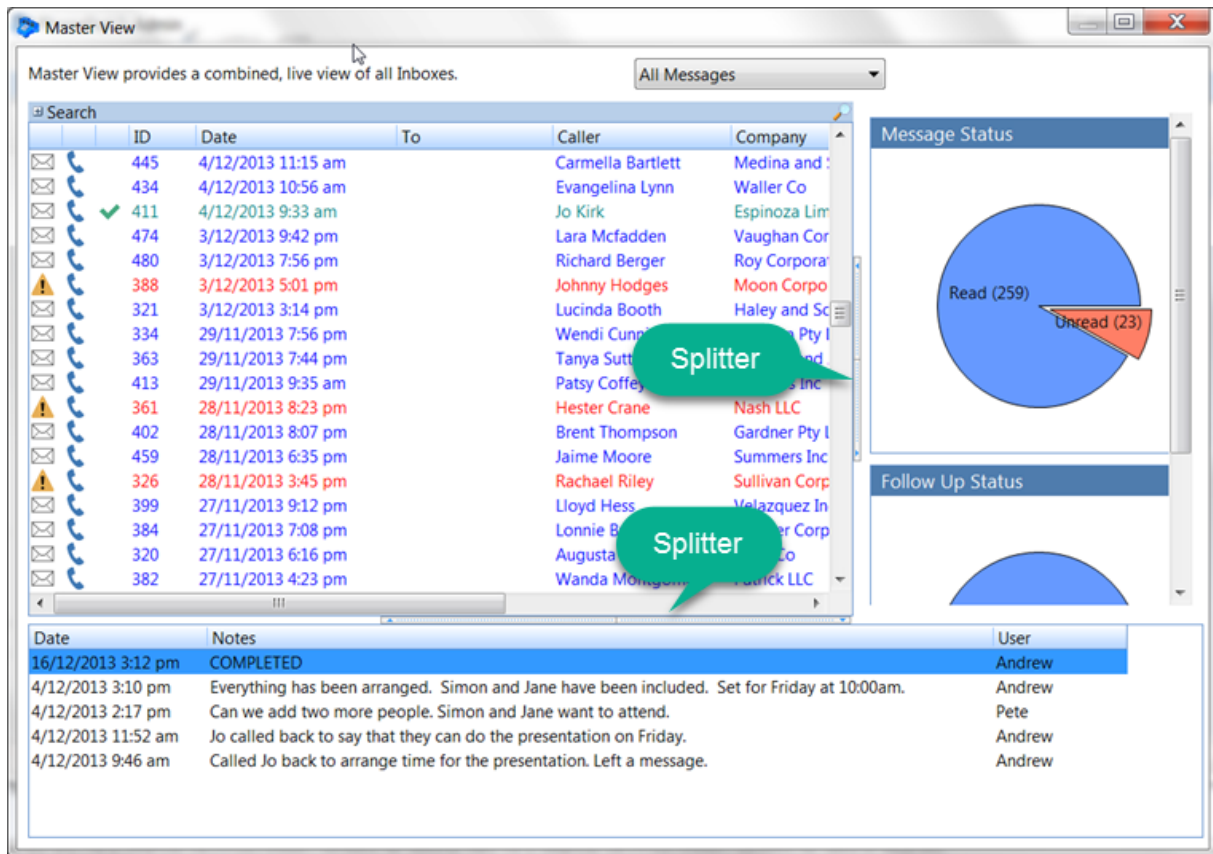
On this tab you can review the current message status for every user. Click the **Update** button to retrieve the data.

[illegible]

Master View

Think of Master View as a super Inbox. It allows you to see all messages from all users' Inboxes in one combined view. You can view the current status of every message and well as who's Inbox each message is sitting in. Just like a normal PhonePad Inbox, you can filter messages and search as well. This is a live view so it is continuously updated.

Select the **Manager** tab on the toolbar and click the **Master View** button, or select **Master View** from the **Manager** menu.

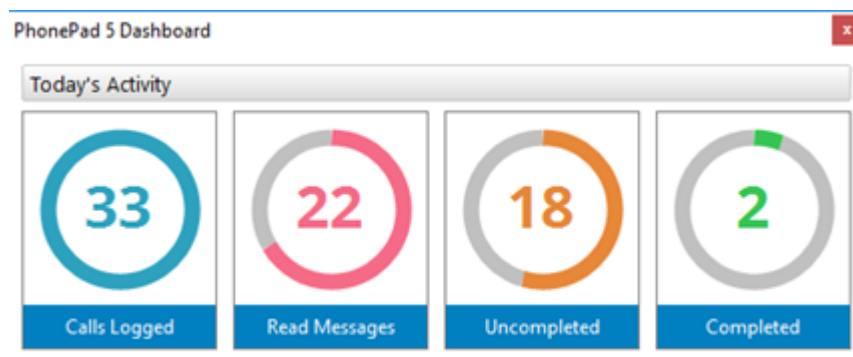


You can view a message by double-clicking on it. This won't change the message read status.

Dashboard

Dashboard provides an easy way for managers and system administrators to view message status. It is automatically updated every few seconds.

Select the **Manager** tab on the toolbar and click the **Dashboard** button, or select **Dashboard** from the **Manager** menu.



Calls Logged	Displays the number of phone messages logged today.
Read Messages	Displays how many messages have been read today.
Uncompleted	Displays the number of uncompleted follow ups for today.
Completed	Displays the number of completed follow ups for today.

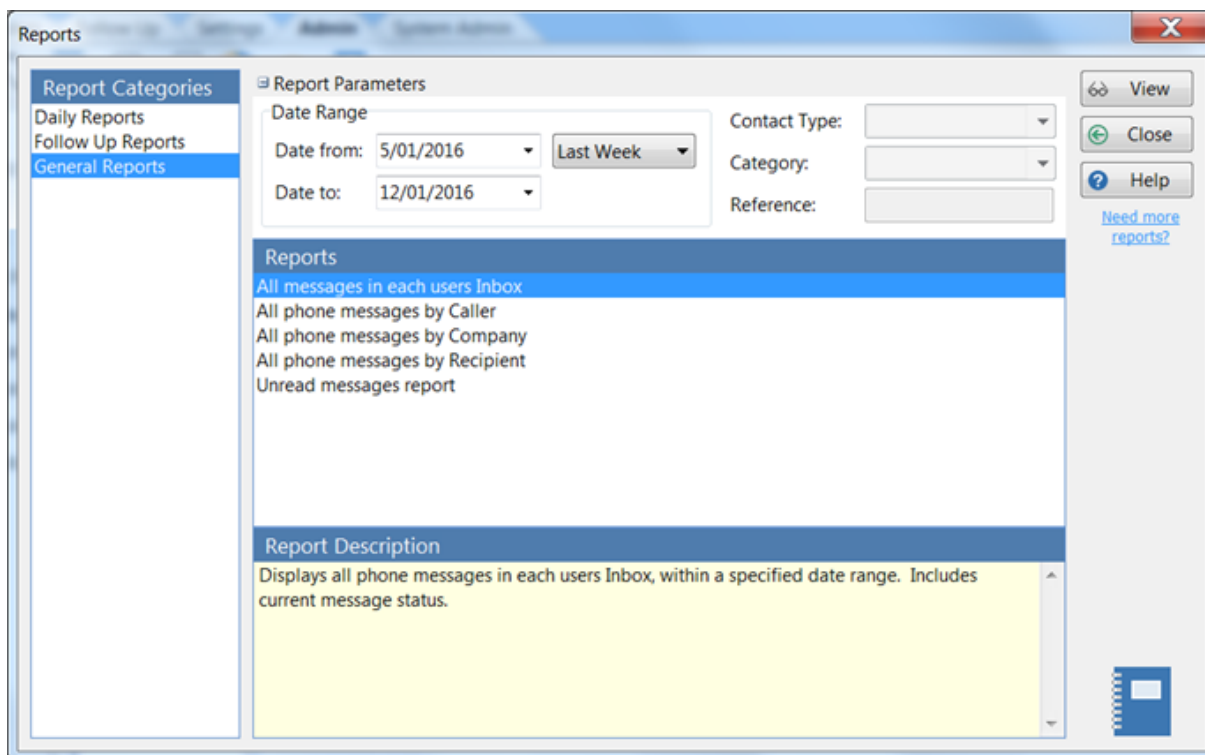
All of these statuses are based on phone calls logged for the current day. If a message was marked for follow up on the day it was logged, then it will appear in the status. The same applies to Completed follow ups and messages read.

You can place the dashboard anywhere on the screen and it will be remembered next time it is run.

Reports

PhonePad 5 includes a range of reports to help you keep on top of things.

Select the **Manager** tab on the toolbar and click the **Reports** button, or select **Reports** from the **Manager** menu.



Some reports require you to select parameters, while others don't require parameters. The Report Parameters will be automatically displayed if you need to select some parameters. Any parameters not required will be disabled.

To run a report:

1. Select a **Report Category**.
2. Select a **Report**.
3. A description of the report will be displayed under **Report Description**.
4. If any parameters are required, select the parameters under **Report Parameters**.
5. Click the **View** button.

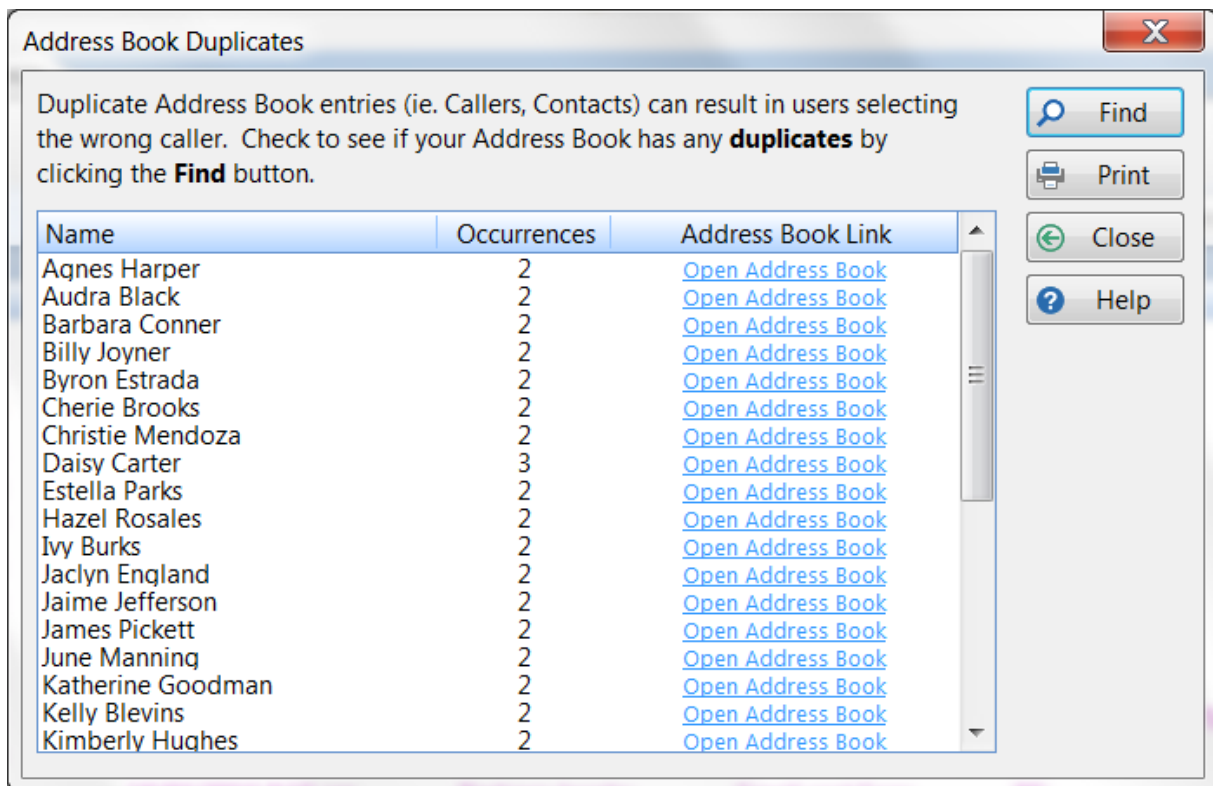
More reports will be added in subsequent releases. If you need reports that PhonePad 5 doesn't have, click the **Need more reports?** link under the Help button and tell us what you need.

Duplicate Address Book Entries

If you manage to get duplicate address book entries then it can become confusing for users when they need to select a caller for an incoming or outgoing message.

You can quickly find out if you have any duplicates by clicking on the **Address Book Duplicates** button on the **Manager** tab of the toolbar, or select **Address Book Duplicates** from the **Manager** menu.

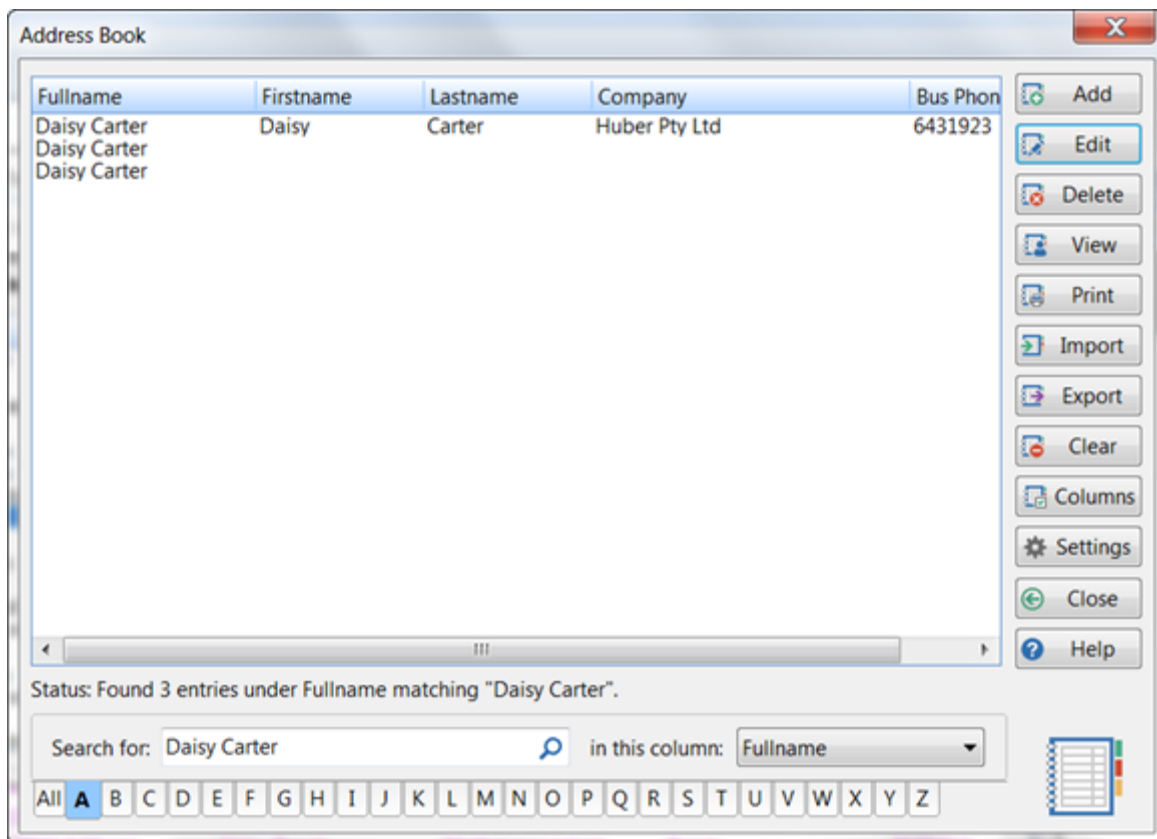
When the window has opened, click the **Find** button to scan the Address Book for duplicates.



Name	Lists the fullname of each caller that has more than one entry in the Address Book.
Occurrences	Shows the number of times the caller appears in the Address Book.
Address Book Link	Click the link to go directly to the duplicate entries in the Address Book.

Viewing Duplicates

Click the link next to the name you want to view. The Address Book will open and the duplicates will be shown.



You can then view each entry in turn to check if they are duplicates and delete any you don't want.

Printing the List of Duplicates

Click the **Print** button to print out the list.

User Email Accounts

It occurred to us that having to go into each user account and adding email addresses could be a bit of a pain, especially if you have a lot of user. This features enables you to manage the email addresses of all users from one screen.

[illegible]

Chapter



5

System Administrators

System Administrators

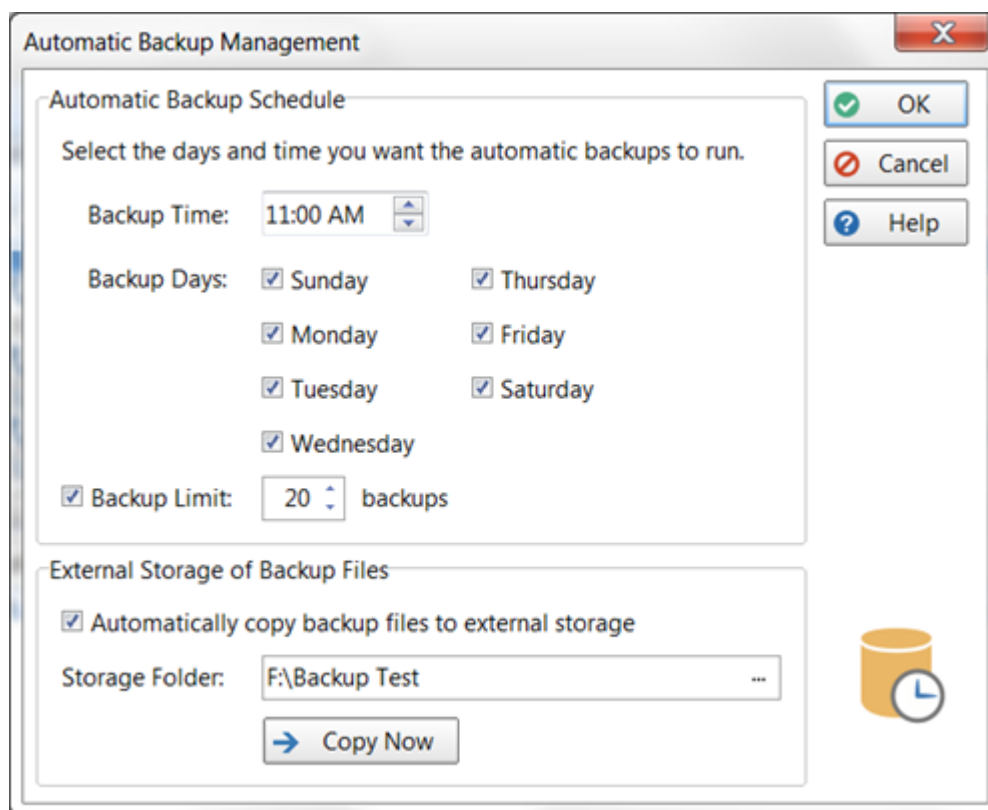
Backing Up Your Data

PhonePad 5 has built-in methods for backing up your valuable data. You can set PhonePad to back up your data automatically, and you can perform a manual back up at any time.

Automatically Backing Up Your Database

PhonePad 5 has a built-in automatic backup feature. When you install the PhonePad 5 Server a AutoBackup schedule is automatically created for you.

You can view and change the backup schedule by selecting the **System Admin** tab on the toolbar and click the **AutoBackup** button, or select **AutoBackup** from the **System Admin** menu.



To change the automatic backup schedule, just enter a time for the backup and select the days you want the backup to run.

If you want to limit the number of backups retained by PhonePad, check the **Backup Limit** checkbox and enter the number of backups you want to keep. The minimum is 5 and the maximum is 90. If you backup every day then 90 would equate to approximately 3 months.

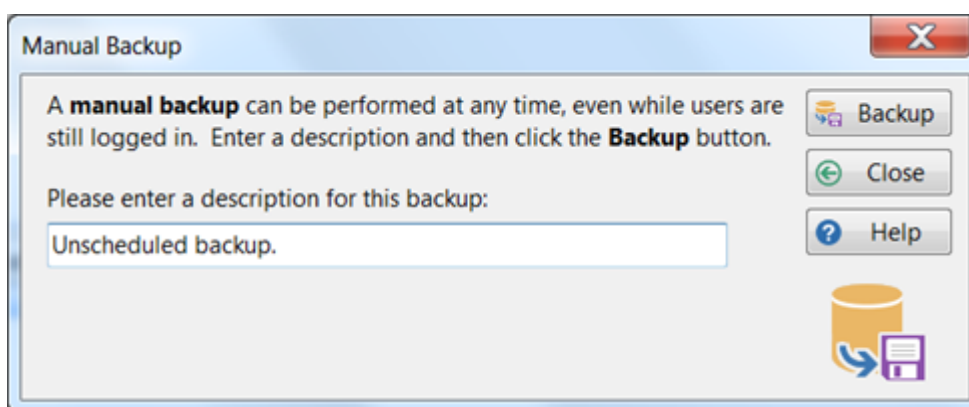
You have the option of copying your backup files to an external device like a flash drive, external hard-drive, your DropBox folder, etc. Just enter or select a drive and check the **Automatically copy backup files to external storage** check box. The copy will be done straight after the backup has been completed.

If you want to do a *manual* copy of the backup files click the **Copy Now** button.

Click **OK** to save your settings.

Running a Manual Backup

You can run a manual backup at any time by selecting the **System Admin** tab on the toolbar and click the **Backup** button, or select **Backup** from the **System Admin** menu.

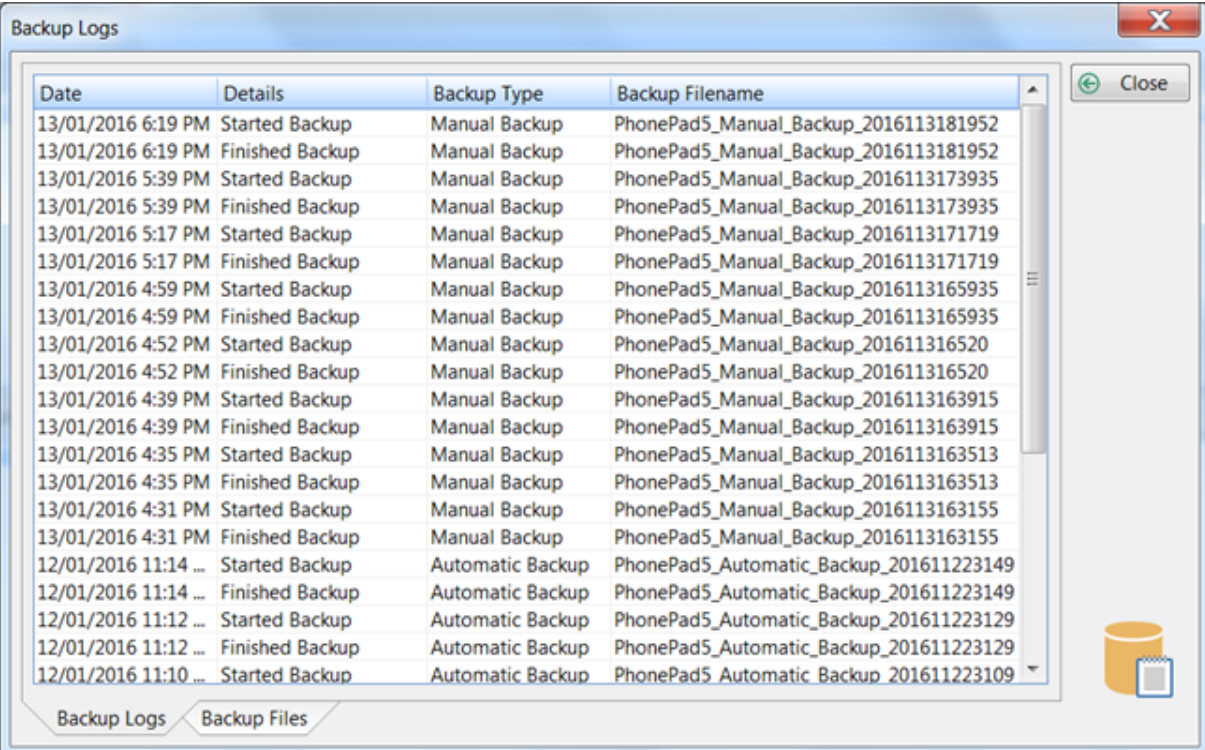


Enter a description for the backup and click the **Backup** button.

A message will be displayed when the backup has completed.

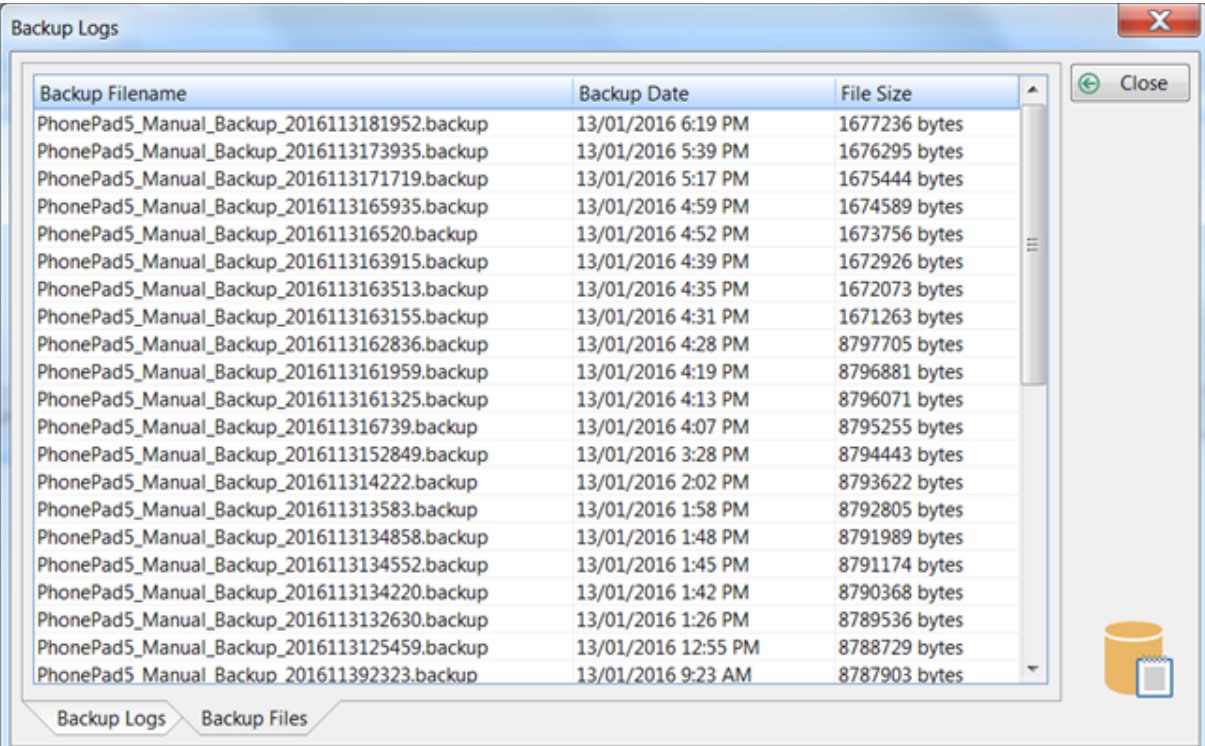
Backup Logs

To view the backup logs, select the **System Admin** tab on the toolbar and click the **Backup Logs** button, or select **Backup Logs** from the **System Admin** menu.



Date	Details	Backup Type	Backup Filename
13/01/2016 6:19 PM	Started Backup	Manual Backup	PhonePad5_Manual_Backup_2016113181952
13/01/2016 6:19 PM	Finished Backup	Manual Backup	PhonePad5_Manual_Backup_2016113181952
13/01/2016 5:39 PM	Started Backup	Manual Backup	PhonePad5_Manual_Backup_2016113173935
13/01/2016 5:39 PM	Finished Backup	Manual Backup	PhonePad5_Manual_Backup_2016113173935
13/01/2016 5:17 PM	Started Backup	Manual Backup	PhonePad5_Manual_Backup_2016113171719
13/01/2016 5:17 PM	Finished Backup	Manual Backup	PhonePad5_Manual_Backup_2016113171719
13/01/2016 4:59 PM	Started Backup	Manual Backup	PhonePad5_Manual_Backup_2016113165935
13/01/2016 4:59 PM	Finished Backup	Manual Backup	PhonePad5_Manual_Backup_2016113165935
13/01/2016 4:52 PM	Started Backup	Manual Backup	PhonePad5_Manual_Backup_201611316520
13/01/2016 4:52 PM	Finished Backup	Manual Backup	PhonePad5_Manual_Backup_201611316520
13/01/2016 4:39 PM	Started Backup	Manual Backup	PhonePad5_Manual_Backup_2016113163915
13/01/2016 4:39 PM	Finished Backup	Manual Backup	PhonePad5_Manual_Backup_2016113163915
13/01/2016 4:35 PM	Started Backup	Manual Backup	PhonePad5_Manual_Backup_2016113163513
13/01/2016 4:35 PM	Finished Backup	Manual Backup	PhonePad5_Manual_Backup_2016113163513
13/01/2016 4:31 PM	Started Backup	Manual Backup	PhonePad5_Manual_Backup_2016113163155
13/01/2016 4:31 PM	Finished Backup	Manual Backup	PhonePad5_Manual_Backup_2016113163155
12/01/2016 11:14 ...	Started Backup	Automatic Backup	PhonePad5_Automatic_Backup_201611223149
12/01/2016 11:14 ...	Finished Backup	Automatic Backup	PhonePad5_Automatic_Backup_201611223149
12/01/2016 11:12 ...	Started Backup	Automatic Backup	PhonePad5_Automatic_Backup_201611223129
12/01/2016 11:12 ...	Finished Backup	Automatic Backup	PhonePad5_Automatic_Backup_201611223129
12/01/2016 11:10 ...	Started Backup	Automatic Backup	PhonePad5_Automatic_Backup_201611223109

You can also view a list of backup files by click the Backup Files tab at the bottom of the window.



Backup Filename	Backup Date	File Size
PhonePad5_Manual_Backup_2016113181952.backup	13/01/2016 6:19 PM	1677236 bytes
PhonePad5_Manual_Backup_2016113173935.backup	13/01/2016 5:39 PM	1676295 bytes
PhonePad5_Manual_Backup_2016113171719.backup	13/01/2016 5:17 PM	1675444 bytes
PhonePad5_Manual_Backup_2016113165935.backup	13/01/2016 4:59 PM	1674589 bytes
PhonePad5_Manual_Backup_201611316520.backup	13/01/2016 4:52 PM	1673756 bytes
PhonePad5_Manual_Backup_2016113163915.backup	13/01/2016 4:39 PM	1672926 bytes
PhonePad5_Manual_Backup_2016113163513.backup	13/01/2016 4:35 PM	1672073 bytes
PhonePad5_Manual_Backup_2016113163155.backup	13/01/2016 4:31 PM	1671263 bytes
PhonePad5_Manual_Backup_2016113162836.backup	13/01/2016 4:28 PM	8797705 bytes
PhonePad5_Manual_Backup_2016113161959.backup	13/01/2016 4:19 PM	8796881 bytes
PhonePad5_Manual_Backup_2016113161325.backup	13/01/2016 4:13 PM	8796071 bytes
PhonePad5_Manual_Backup_201611316739.backup	13/01/2016 4:07 PM	8795255 bytes
PhonePad5_Manual_Backup_2016113152849.backup	13/01/2016 3:28 PM	8794443 bytes
PhonePad5_Manual_Backup_201611314222.backup	13/01/2016 2:02 PM	8793622 bytes
PhonePad5_Manual_Backup_201611313583.backup	13/01/2016 1:58 PM	8792805 bytes
PhonePad5_Manual_Backup_2016113134858.backup	13/01/2016 1:48 PM	8791989 bytes
PhonePad5_Manual_Backup_2016113134552.backup	13/01/2016 1:45 PM	8791174 bytes
PhonePad5_Manual_Backup_2016113134220.backup	13/01/2016 1:42 PM	8790368 bytes
PhonePad5_Manual_Backup_2016113132630.backup	13/01/2016 1:26 PM	8789536 bytes
PhonePad5_Manual_Backup_2016113125459.backup	13/01/2016 12:55 PM	8788729 bytes
PhonePad5_Manual_Backup_201611392323.backup	13/01/2016 9:23 AM	8787903 bytes

Restoring Your Data from a Backup

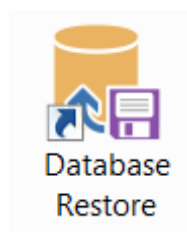
Being able to back up your PhonePad data is important, but of course you also need a way to restore it if the need arises.

Restoring a Backup

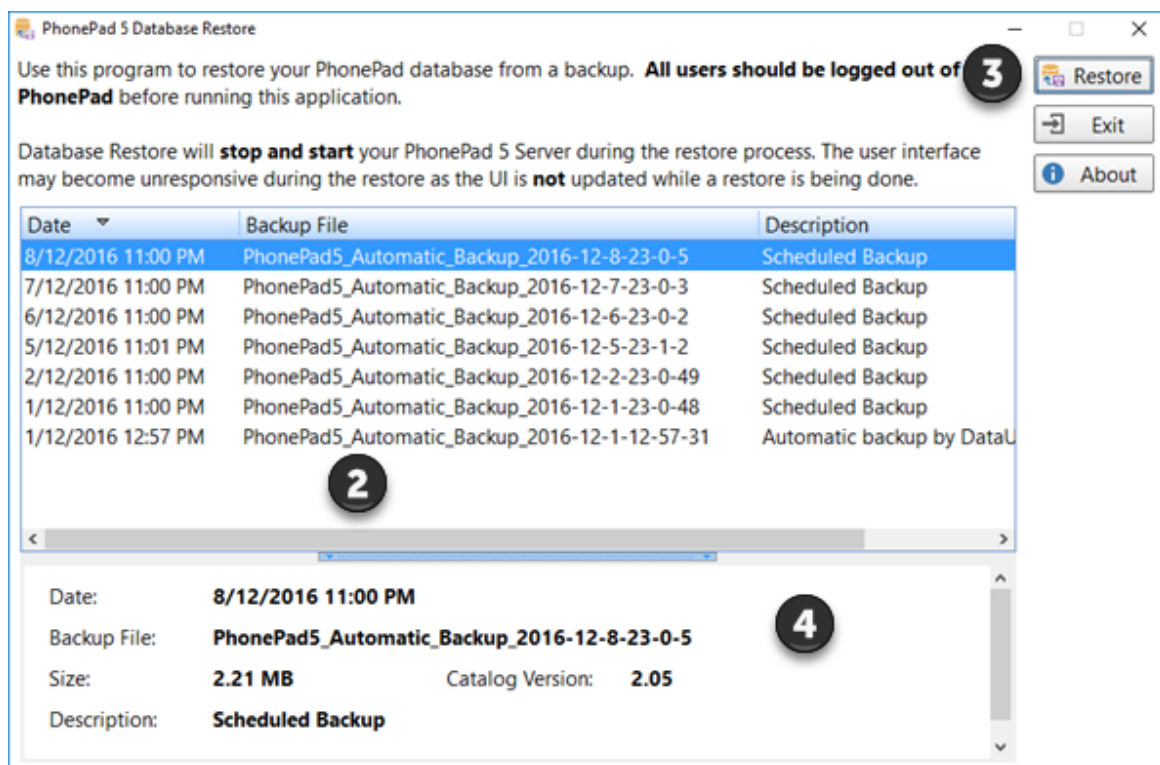
In the PhonePad 5 Server folder on your Server or Host PC, you should find an application called **DatabaseRestore**.

Before starting, make sure all users have logged out of PhonePad.

1. Run **DatabaseRestore**.



2. When the application has started, it will list all of the backups you currently have. Select a backup from the list.



3. Click the **Restore** button to begin restoring your data from the backup.
4. The details pane shown in the lower part of the window displays information about the selected backup file.
5. The process may take a few minutes, depending on how much data is in your database.

Restoring a Backup for a Previous Version

If the backup you are restoring from was done when you were using a previous version of PhonePad 5 then the data structures of your current database and the backup copy may not be compatible.

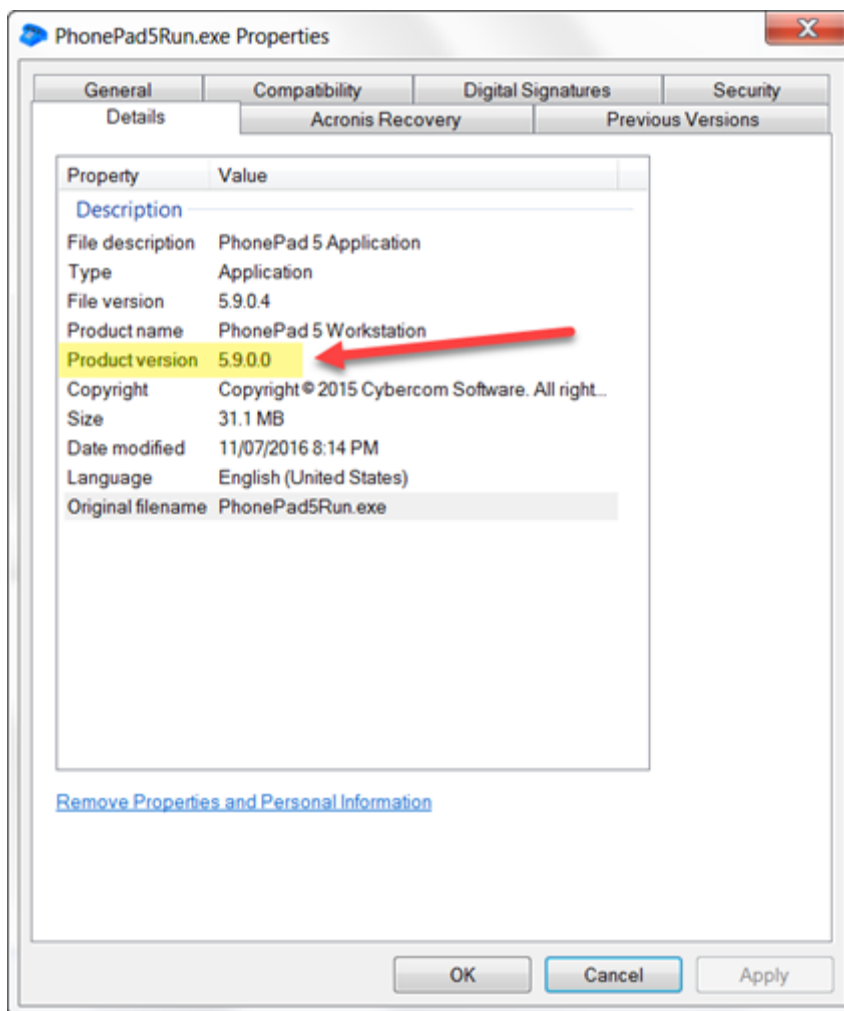
For example, say you are now using PhonePad 5.9.0 but when the last backup was done your were using PhonePad 5.7.0. There were likely some database changes between the two versions.

If you restore from that backup, you would probably get some error messages when trying to start PhonePad. The solution is to update the restored database so that it is the same version as PhonePad 5 Server and PhonePad 5 Workstation.

Fortunately this is quite easy to do.

Check the version number of PhonePad that you are currently using, and then download the server update for that version from www.myphonepad.com. When you run the server update it will analyze the PhonePad database you just restored and bring it up to date.

One way you can check the version number is to right-click on **PhonePad5Run.exe** in the **PhonePad** folder, and select **Properties** from the popup menu. The **Details** tab will show the version number.



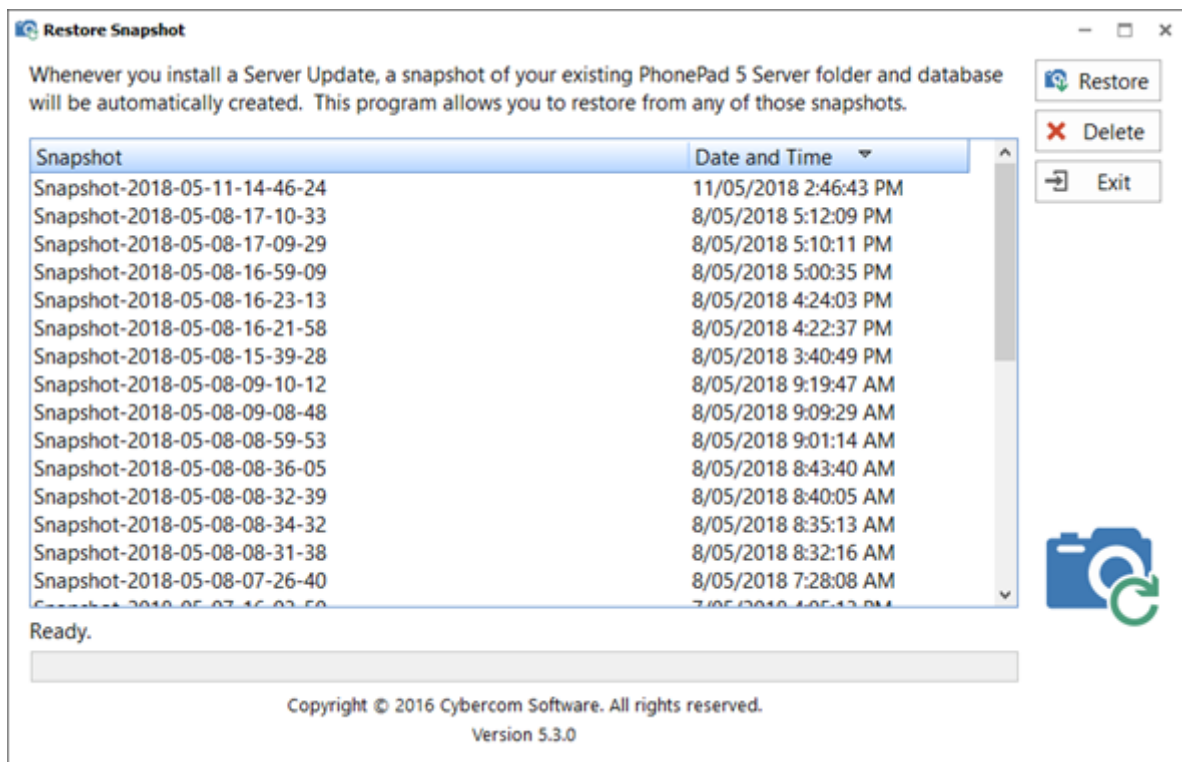
Restoring from a Snapshot

Snapshots are created automatically whenever you install a server update (from Version 5.15.0 onwards). It's like taking a photo of your application and database files at a specific point in time.

The purpose of snapshots is to protect your PhonePad 5 Server installation in case something goes wrong with an update. For example, if your server crashes during an update the database can be left in an incomplete state and may even have some corruption.

Snapshots enable you to return your PhonePad 5 Server files to the state they were in before applying the server update, with just a couple of mouse clicks.

To restore a snapshot, go to the PhonePad 5 folder on your server (C:\PhonePad5Server) and double-click on **RestoreSnapshot**.



All snapshots will appear in the list as shown above. They can be identified by the date and time the snapshot was taken.

All you need to do is select a snapshot and click the **Restore** button. You will be asked to confirm the restore. It will take several minutes to revert your files back to the way they were at the time of the snapshot.

If you have any of the application files open they will be automatically closed (from Version 5.15.0 onwards). The PhonePad 5 Server will be stopped and started during this process.

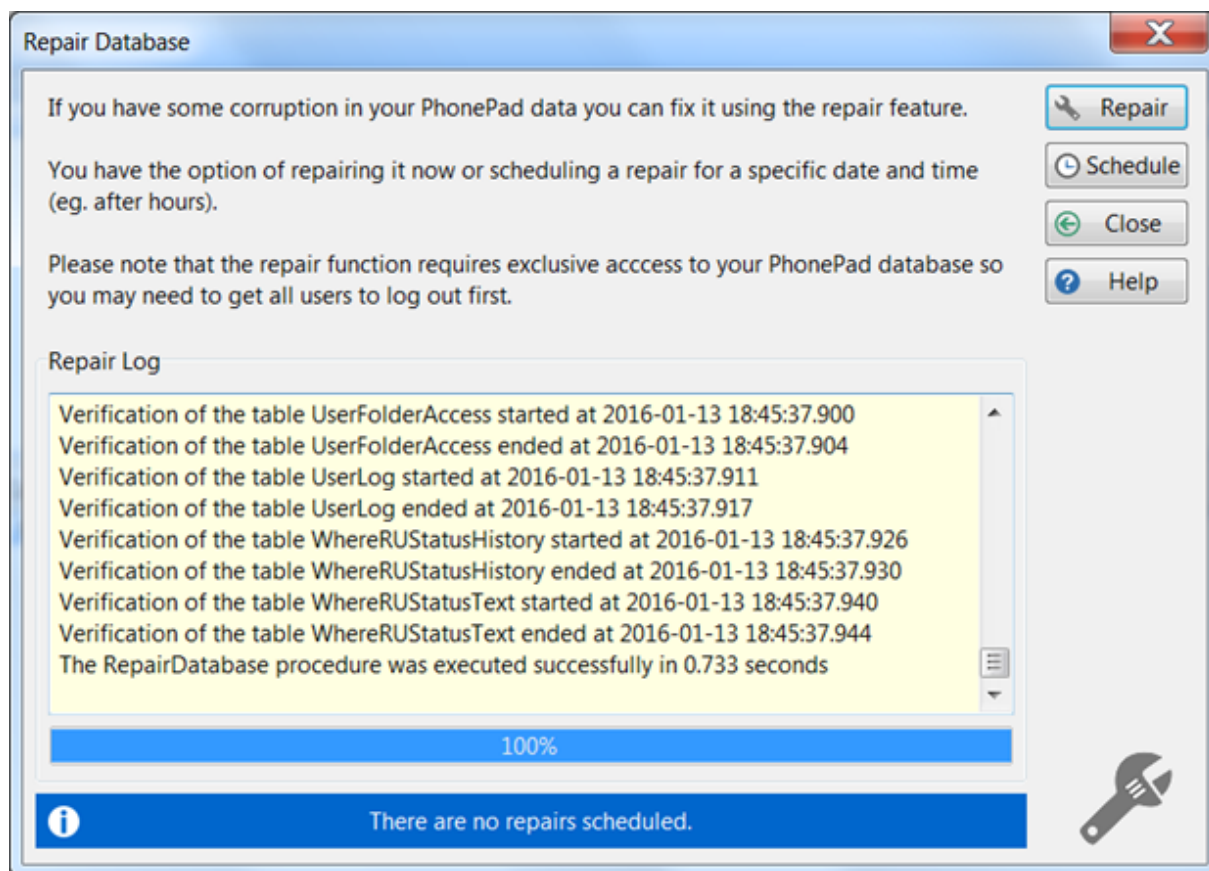
Once the restore has been completed you will be able to continue on as before the server update was applied.

Repairing Your PhonePad Database

If you get error messages indicating that there are problems with your PhonePad data, in particular data corruption, you can repair the database using a couple of methods.

PhonePad Repair Option

To repair your PhonePad data, select the **System Admin** tab on the toolbar and click the **Repair** button, or select **Repair** from the **System Admin** menu.



You can either repair your database right away, or you can schedule it for a later time.

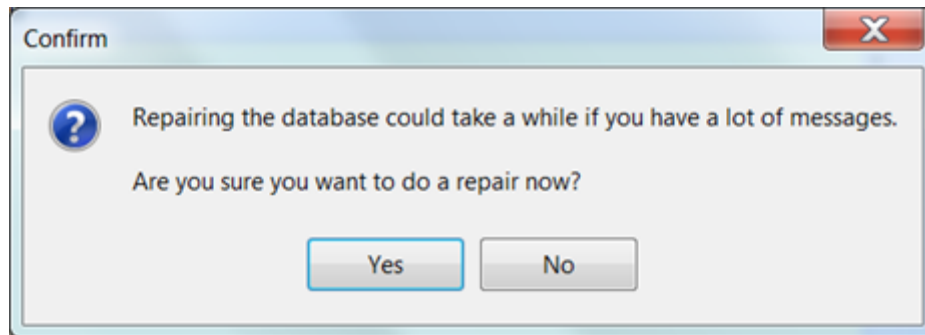


All users, except you, must be logged out of PhonePad before repairing your database. The repair process needs exclusive access to the database.

Repair Now

Click the **Repair** button to run a repair now.

You will be asked to confirm this.

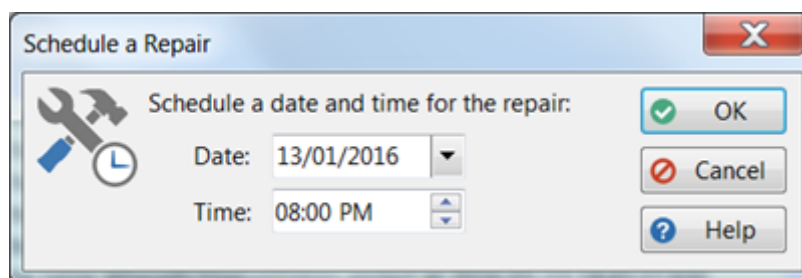


Click **Yes** to perform the backup or **No** to cancel it.

The progress of the backup will be shown in the on-screen backup log and the progress bar.

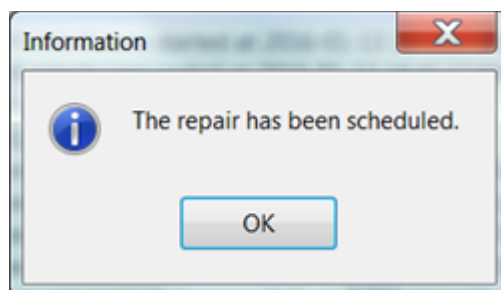
Schedule a Repair

Click the **Schedule** button if you want the repair to be done at a later time.

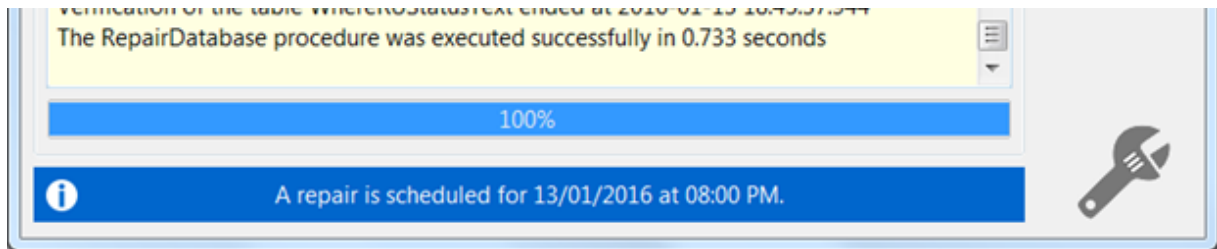


Enter a date and time for the repair to be done, then click the **OK** button.

A message will be displayed to confirm that the repair has been scheduled.



The scheduled repair details will be shown at the bottom of the repair window.



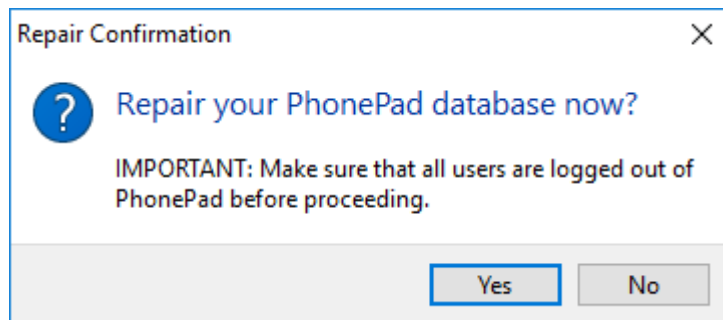
Database Repair Application

In the unlikely event that your user account has been damaged by data corruption, preventing you from logging in and using the Repair option, don't panic. You can use the Database Repair application instead.

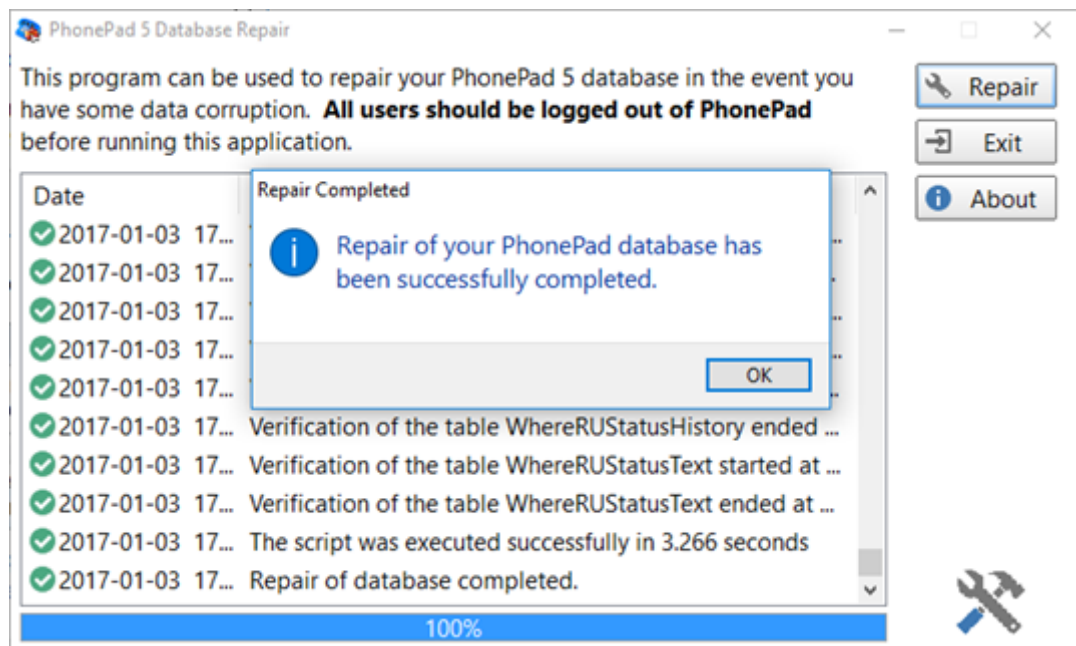
You will find it in the PhonePad 5 Server folder (eg. *C:\Program Files (x86)\PhonePad5Server*).

Run **DatabaseRepair** and click the **Repair** button.

You will be asked to confirm the repair.



Click **Yes** to perform the repair, or click **No** to cancel it.

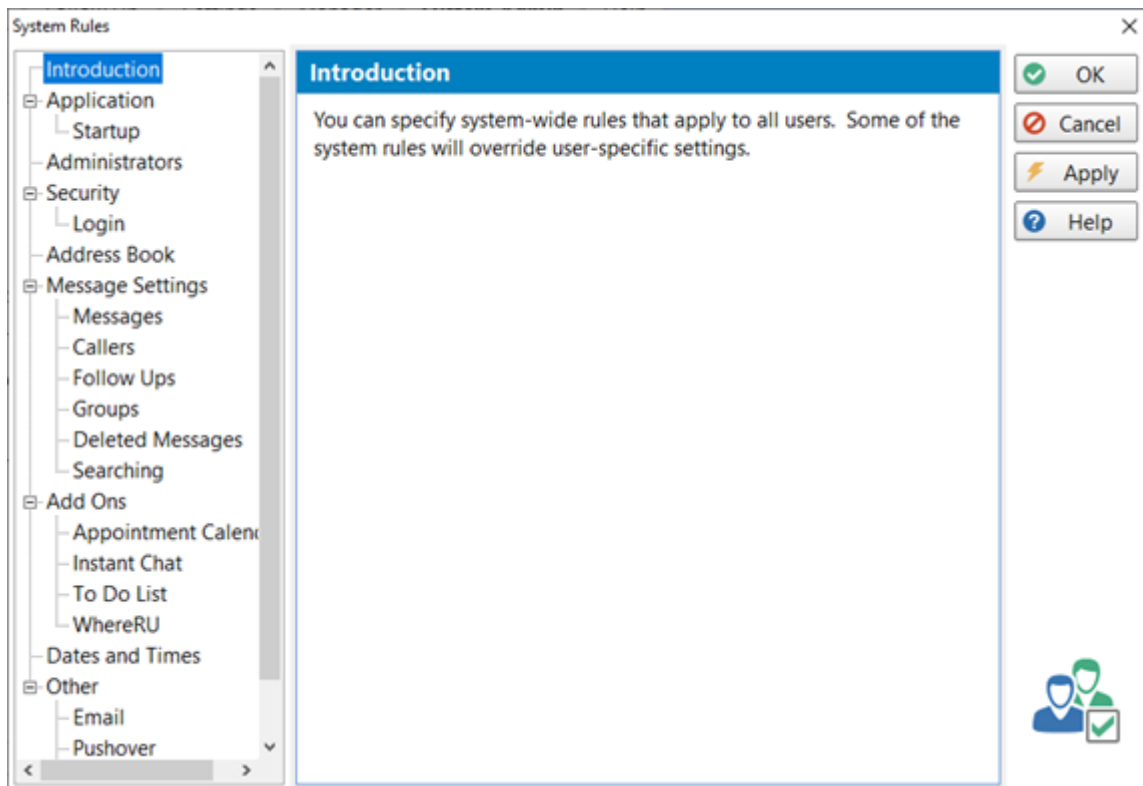


The progress of the repair will be shown in the on-screen repair log and progress bar. A message will be displayed once that repair has finished.

System Rules

System Rules is a powerful feature that allows you to apply a range of settings that affect all PhonePad users.

To access System Rules, select the **System Admin** tab and click on the **System Rules** button, or select **System Rules** from the **System Admin** menu.



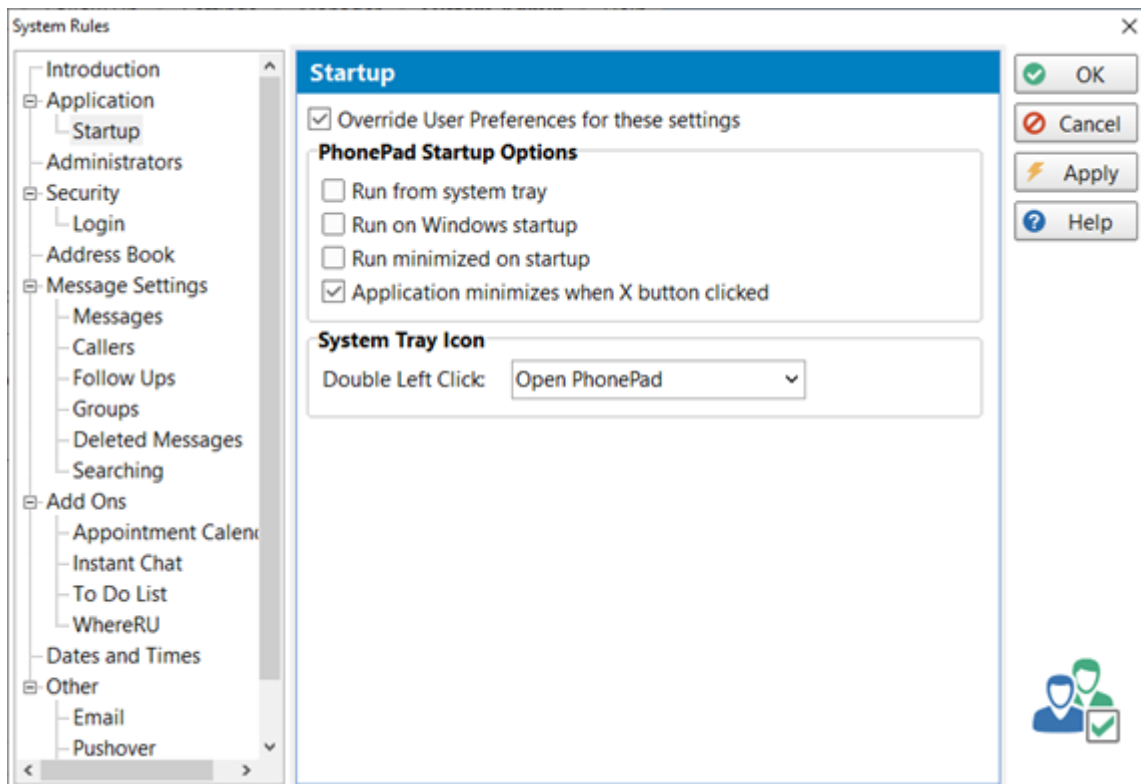
The navigation tree on the left side of the window allows you to select the group of settings you want to view or change.

Application

Application settings are for PhonePad. Settings for Instant Chat and WhereRU can be found under the Add Ons section.

Startup

The **Startup** settings determine what happens when PhonePad starts.



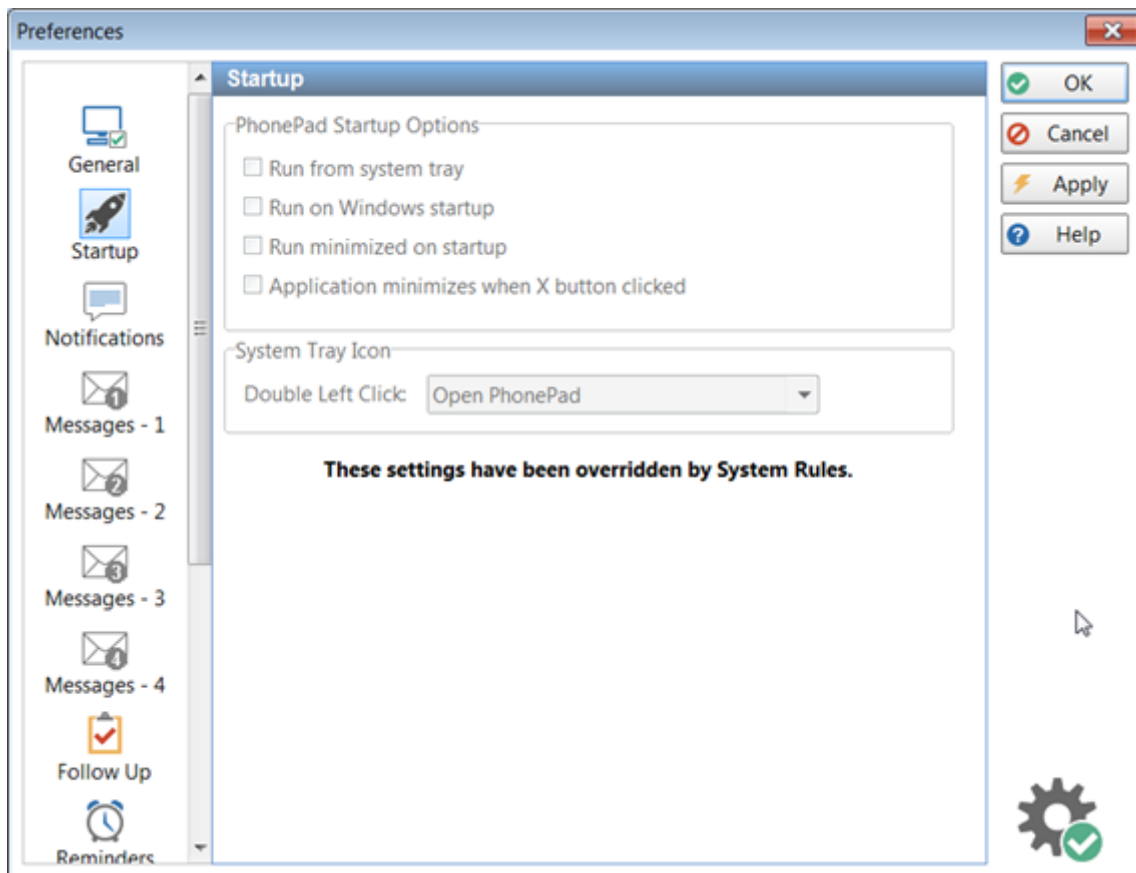
User Settings or System Settings

You can set these settings system-wide for all users, or you can allow users to set their own settings.

System Wide Settings

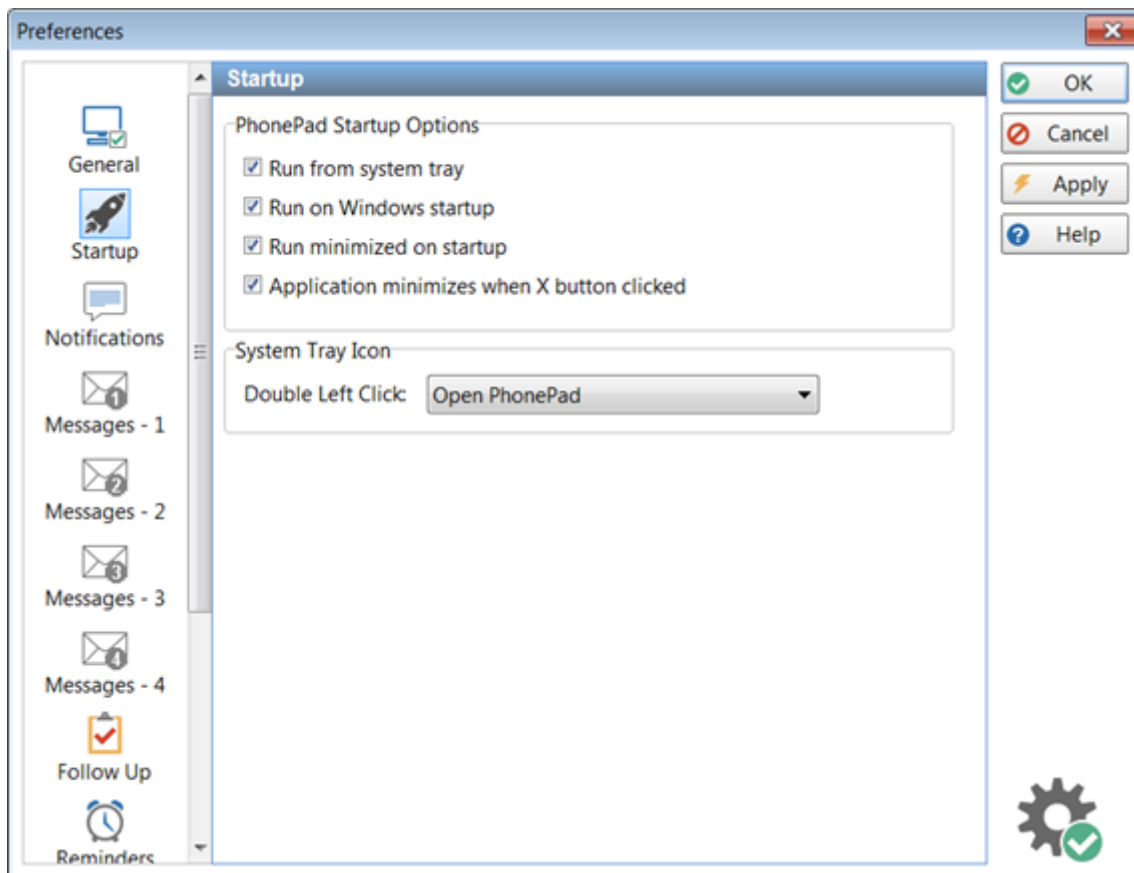
To enforce system wide settings for PhonePad startup, check the **Override User Preferences for these settings** check box.

Users will be unable to make any changes to these settings under **View/Preferences**.



Local User Settings

To allow each user to change their own Startup settings, leave the **Override User Preferences for these settings** check box unchecked.



PhonePad Startup Options

Run from system tray	When checked, PhonePad will run from the system tray.
Run on Windows startup	When checked, PhonePad will start automatically when Windows starts.
Run minimized on startup	When checked, PhonePad will minimize when it starts.
Application minimizes when X button clicked	When checked, PhonePad will minimize instead of closing when the X (close button) is clicked.

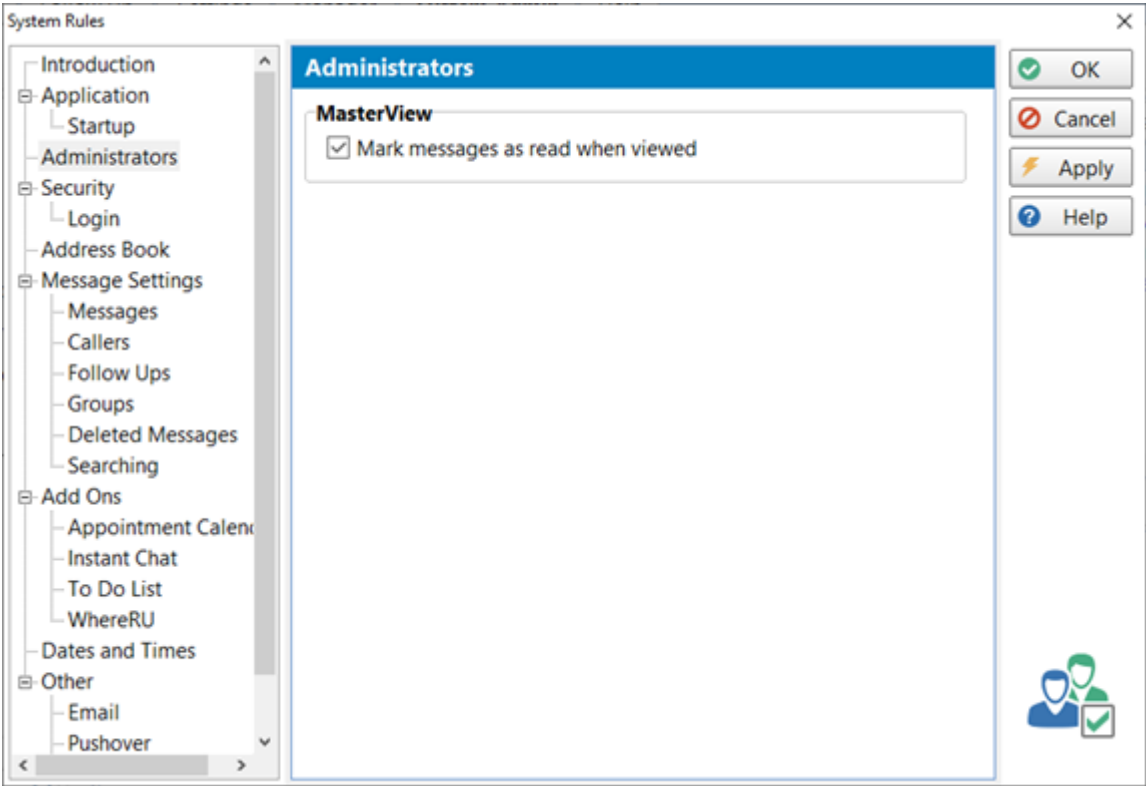
System Tray Icon

Double Left Click	<p>You can specify what happens when a user double-clicks on the PhonePad icon in the system tray:</p> <ul style="list-style-type: none"> • Open PhonePad • Create a New Phone Message • Create a New Outgoing Message
--------------------------	---

	<ul style="list-style-type: none">• Create a New Text Message• Display Address Book
--	--

Administrators

Settings on this screen apply only to administrators.

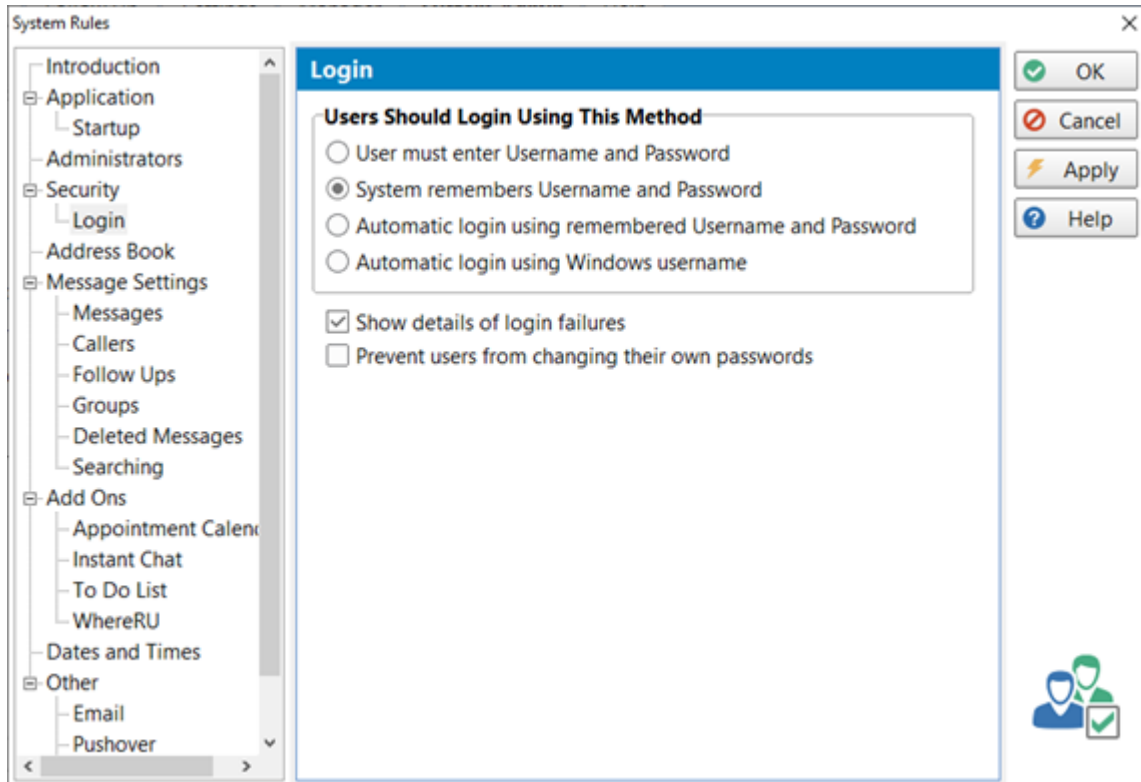


MasterView	
Mark messages as read when viewed	<p>The MasterView features gives administrators access to all messages in all Inboxes. This setting determines what happens when a message is read from the MasterView window.</p> <p>If this check box is checked, a message will be marked as read when an administrator views the message from the MasterView window.</p>

Security

Login

As a system administrator, you can determine which login method should be used by all users.



Users should login using this method

User must enter Username and Password	This is a standard login method. The user enters their Username and Password , then clicks the OK button to login.
System remembers Username and Password	When logging in, PhonePad remembers the last user's Username and Password and automatically prefills these fields for the user. All they need to do is click the OK button.
Automatic login using remembered Username and Password	When logging in, PhonePad prefills the Username and Password and clicks the OK button for them. In other words the user is automatically logged in without having to enter their details or click the OK button.
Automatic login using Windows username	PhonePad automatically logs the user in based on their Windows Username.

	Important: The PhonePad Username must exactly match the Windows Username.
Show details of login failures	If checked, when a user enters the wrong username or password, the error message will specify whether it was the username or password that was incorrect.
Prevent users from changing their own passwords	If checked, users will be unable to change their passwords. This will then have to be done by a Manager or Administrator.

Address Book

These settings relate to the PhonePad Address Book.

Address Book

Adding and Updating

- ☒ Add new callers to Address Book
 - ☐ Prompt when adding callers
- ☒ Update existing callers in Address Book
 - ☒ Prompt when updating callers
 - ☐ Check for duplicates when adding

Address Book Tabs

- ☒ Show Business tab
- ☒ Show Map tab
- ☒ Show Postal Tab
- ☒ Show Family tab
- ☒ Show Home tab
- ☒ Show Notes tab
- ☒ Show Documents tab

Address Book Type

This setting affects the entire Address Book and what is displayed under the Caller list.

Address Book Type: Individual and Company ▼

Labels

Identification Label: Identification

Notes

	Notes Name	Notes Color
<input checked="" type="checkbox"/> Notes 1:	Some Notes	■ Lime ▼
<input checked="" type="checkbox"/> Notes 2:	More Notes	■ Custom ... ▼
<input checked="" type="checkbox"/> Notes 3:	Even More Notes	■ Custom ... ▼
<input checked="" type="checkbox"/> Notes 4:	Notes 4	□ Window ▼
<input checked="" type="checkbox"/> Notes 5:	Notes 5	□ Window ▼
<input checked="" type="checkbox"/> Notes 6:	Notes 6	□ Window ▼
<input checked="" type="checkbox"/> Notes 7:	Notes 7	□ Window ▼
<input checked="" type="checkbox"/> Notes 8:	Notes 8	□ Window ▼
<input checked="" type="checkbox"/> Notes 9:	Notes 9	□ Window ▼
<input checked="" type="checkbox"/> Notes 10:	Notes 10	□ Window ▼

Adding and Updating	
Add new callers to Address Book	When checked, new callers will be automatically added to the Address Book.
Prompt when adding callers	When checked, users will be asked if they want to add a new caller to the Address Book. Only valid if <i>Add New Callers to Address Book</i> is enabled.
Update existing callers in Address Book	When checked, existing callers will be updated with any details that have changed for this caller.
Prompt when adding callers	When checked, users will be asked if they want to update a caller's details.
Check for duplicates when adding	When checked, PhonePad will check to see if the new caller you are adding already exists in the Address Book.
Address Book Tabs	
Show Business tab	These settings determine whether or not the relevant tabs are displayed when adding, editing or viewing Address Book entries. By default, all of these check boxes are checked which means all of the tabs will appear. If there are tabs you don't use or if they're not relevant to your business then you can hide them by un-checking the appropriate check boxes.
Show Postal tab	
Show Home tab	
Show Map tab	
Show Family tab	
Show Notes tab	
Show Documents tab	
Labels	
Identification Label	Enables you to set the text of the Identification label used in the Address Book.
Notes	
Notes Checkboxes	If checked, the Notes tab will be displayed in each Address Book entry. If unchecked, the Notes tab will not be displayed.
Notes Name	This allows you to rename the Notes tabs that are shown in the Address Book.
Notes Color	Change the color of each Notes tab.

Update Entry

Caller Information

Fullname: Mathew Abbott

Company: Lester Enterprises

OK Cancel Print Help

Postal Home Map Family **Notes** Documents

Some Notes More Notes Even More Notes Notes 4 Notes 5 Notes 6

Notes 1



If a user does not have the appropriate Address Book permissions, they will be unable to add or update callers in the Address Book.

Message Settings

These settings apply specifically to messages.

Messages

These settings affect new phone messages.

System Rules

Messages

Phone Message Subject

☒ Use Subject prefix:

☐ Use Message Details when subject is blank

☐ Prevent message from being sent if subject is blank

☐ Category must be selected before message can be sent

Phone Number Formatting

☒ No formatting

☐ Use this format:

X Required Number
x Optional Number
- Separator

Message Editing

☒ Allow message editing

Recipient List

☐ Show disabled user accounts

Message Preview

☐ Mark message as read when previewed

OK Cancel Apply Help

Phone Message Subject

Use Subject prefix

When checked, all new phone messages will be prefixed with the text you enter in this field.

Use Message Details when subject is blank

When checked, the Subject field will contain message details if the Subject field is left blank. For example: Phoned - Please Phone.

Prevent message from being sent if subject is blank

When checked, messages cannot be sent if the Subject field is blank. This forces the user to enter something in the Subject field.
bj

Phone Number Formatting

No formatting

Phone number is displayed as entered.

Use this format

Phone number will be displayed based on the format entered.

Message Editing

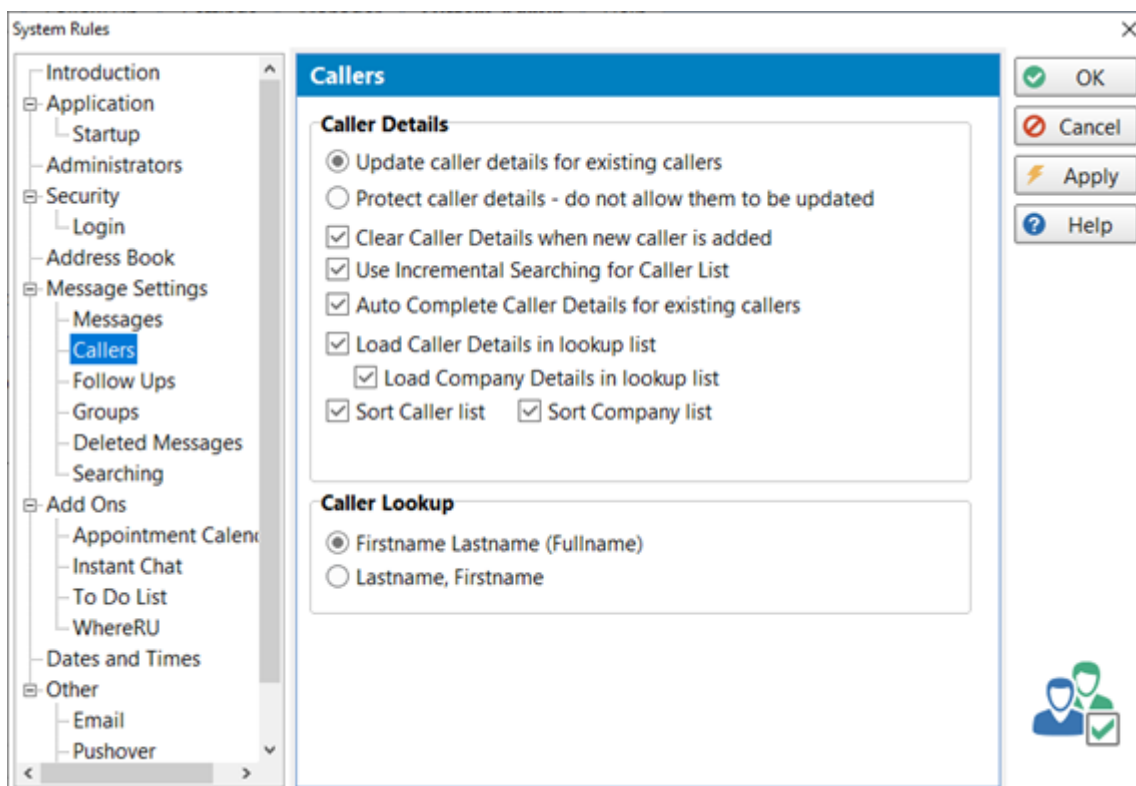
Allow message editing

If checked, messages can be edited *after* they have been sent. Any changes to a message, eg. the message text, will be changed for users that

	have either sent or received the message.
Recipient List	
Show disabled user accounts	When checked, disabled user accounts will appear in the To: list of new phone and text messages, which means you will be able to send messages to disabled accounts.
Message Preview	
Mark message as read when previewed	If checked, messages will be marked as read when users preview the message using the Inbox Preview pane.

Callers

These settings affect caller details in new phone messages.



Caller Details

Update caller details for existing callers

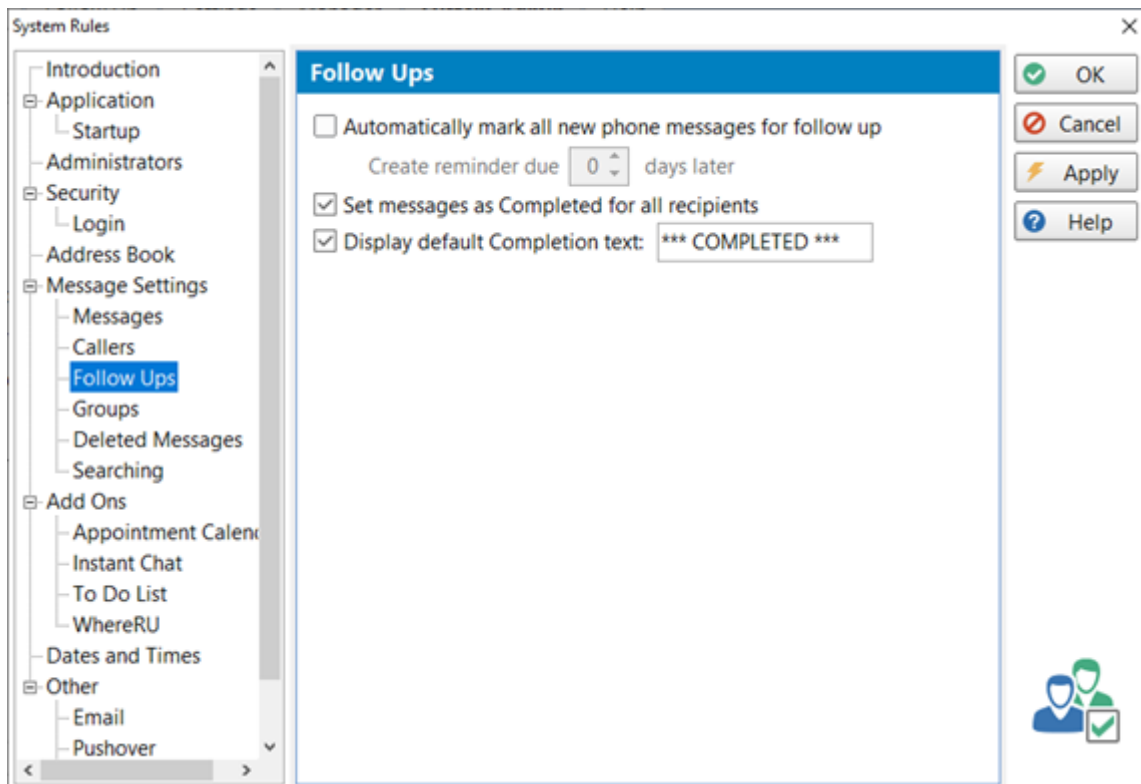
When selected, the Company and Phone fields of a caller (that already exists in the Address Book) will be automatically added to a new phone

	message. Any details that have <i>already been entered</i> in the Company and/or Phone fields of the new phone message will be overwritten.
Protect caller details - do not allow them to be updated	<p>When selected, the Company and Phone fields of a caller (that already exists in the Address Book) will be automatically added. However, any details that have <i>already been entered</i> in the Company and/or Phone fields of the new phone message will not be overwritten.</p> <p>In other words, if a user hasn't yet entered any details in the Company and/or Phone fields, then these fields will be filled in from the Address Book.</p>
Clear caller details when new caller is added	<p>When checked, the Company and Phone fields will be cleared if a new caller is entered in the Caller field.</p> <p>For example, you may have entered the Company and Phone Number, and then realize you entered the wrong name in the Caller field. If this setting is checked then the Company and Phone Number fields will be cleared.</p>
Use Incremental Searching for Caller List	When checked, as you type in the Caller field PhonePad will search through the list to find any matching callers.
Auto Complete Caller Details for existing callers	When checked, PhonePad automatically fills in the caller's Company and Phone fields if they exist in the Address Book. You would normally have this option enabled as this saves time entering information.
Load Caller Details in lookup list	When checked, the phone message form loads callers the Caller drop-down selection list that allows you to select callers. You would normally leave this option checked if you want to be able to select callers.
Load Company Details in lookup list	<p>When checked, the phone message form loads a list of organizations from the Address Book. This can save time by allowing you to select a caller's organization.</p> <p>If you are experiencing performance issue due to an extremely large Address Book you can disable this option.</p>
Sort Caller List	When checked, the Caller selection list will be alphabetically sorted.

	With extremely large Address Books there can be a performance hit so if you find the phone message form takes a long time to open then you may want to disable this option. Although this option can make it easier to find names, the incremental search feature will quickly filter out the other entries.
Sort Company List	<p>When checked, the Company selection list will be alphabetically sorted.</p> <p>With extremely large Address Books there can be a performance hit so if you find the phone message form takes a long time to open then you may want to disable this option. Although this option can make it easier to find names, the incremental search feature will quickly filter out the other entries.</p>
Caller Lookup	
Firstname Lastname (Fulltime)	Callers will be listed by Fullname in the caller lookup list of phone messages.
Lastname, Firstname	Callers will be listed by Lastname, Fullname in the caller lookup list of phone messages.

Follow Ups

These settings affect how Follow Ups work.



Follow Ups

Automatically mark all new phone messages for follow up

When checked, new phone messages that are received will be automatically marked for follow up.

This is a handy feature if you have a follow up process for all calls your business receives.

Create reminder due x days later

This option is dependant on the above option being checked. When checked, every message that is automatically marked for Follow Up will also have a reminder created. The number of days determines when the reminder will be due. Set it to 0 if you want the reminder to fall due today.

Set messages as Completed for all recipients

When checked, when the follow up has been completed on a message that was sent to multiple users, it will be marked as completed for all of these users. This lets everyone else know that no further action is required.

Display default Completion text

When checked, the text entered in this field will be added to the follow up note that is automatically created when a message is marked as completed.

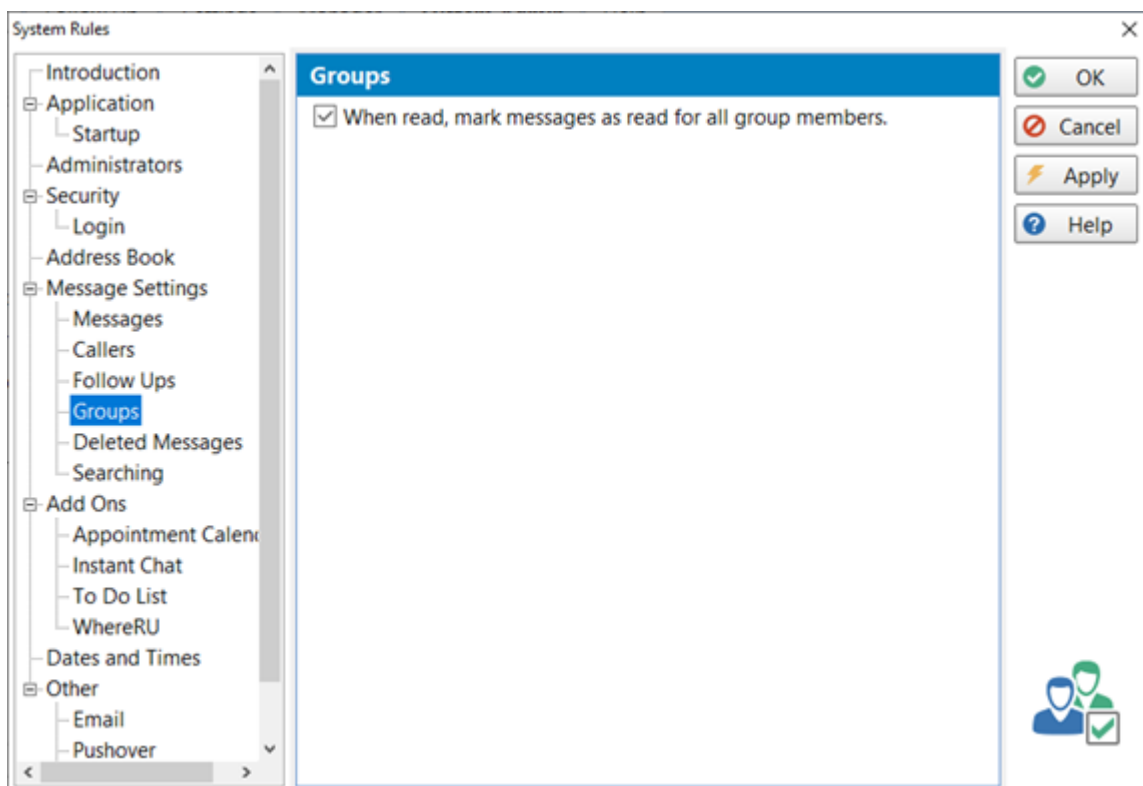
Allow completion without being marked for Follow Up

When checked, a message *not marked for Follow Up* can still be marked as Completed.

When unchecked, only messages marked for Follow Up can be marked as Completed. This avoids accidentally marking a message as Completed when really what you wanted to do is mark it for Follow Up.

Groups

Settings on this page are for **Groups**.



Groups

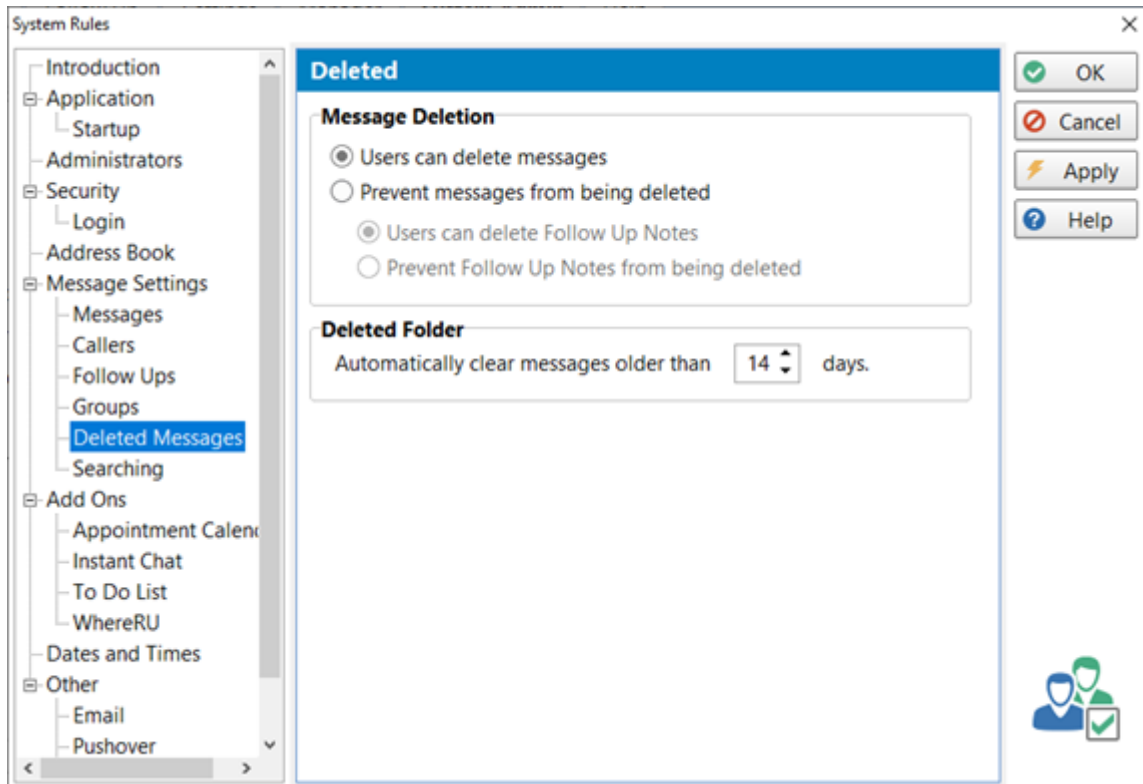
When read, mark messages as read for all group members

When checked, a message that is sent to a group will be marked as read for all group members. This can be useful for teams where only one person needs to respond to a message sent to the team.

Deleted Messages

Messages in the **Deleted** folder are automatically cleared out (permanently deleted) after they have been there a specific amount of time. PhonePad keeps track of when a message is moved to the deleted folder and then removes it permanently once it has been there for the specified amount of time.

The default is 14 days however this can be changed to any number of days from 7 to 365.



Message Deletion

Users can delete messages

When selected, a message that is sent to a group will be marked as read for all group members. This can be useful for teams where only one person needs to respond to a message sent to the team.

Prevent changes from being deleted

Users can delete Follow Up Notes

When selected, users are unable to delete messages but they can delete Follow Up Notes.

Prevent Follow Up Notes from being detected

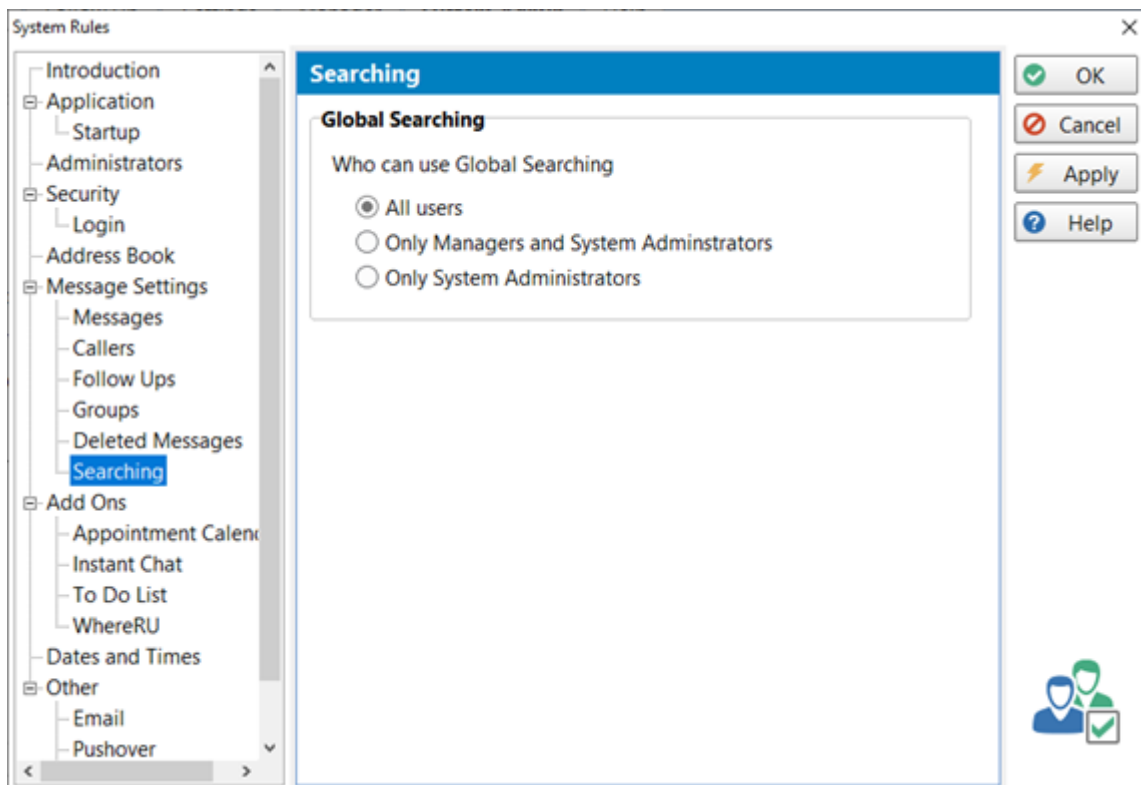
When selected, users are unable to delete messages or Follow Up Notes.

Deleted Folder	
When read, mark messages as read for all group members	When checked, a message that is sent to a group will be marked as read for all group members. This can be useful for teams where only one person needs to respond to a message sent to the team.

Searching

The Global Search feature can search all messages in the system, including messages in all users' Inboxes and other folders.

You may not want all users to have this kind of searching capability. This system rule allows you to limit access to Global Searching.



Global Searching	
All Users	When selected (the default), any user can search all messages in the database.

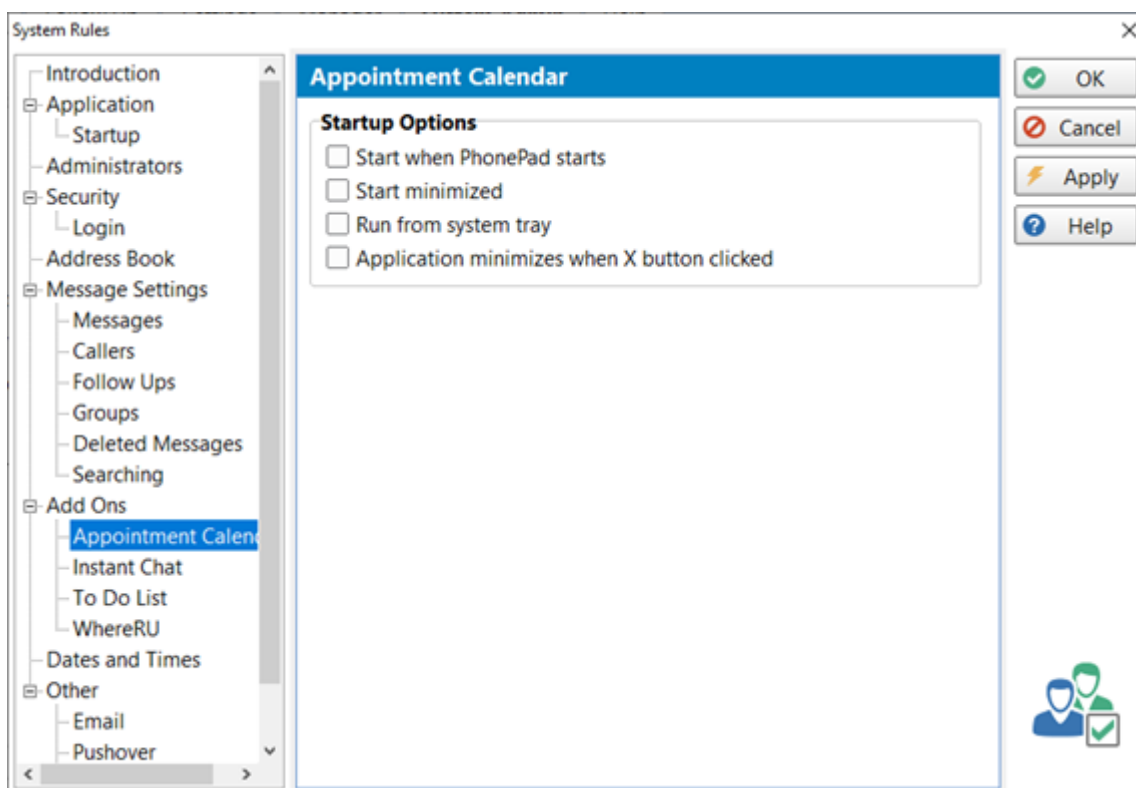
Only Managers and System Administrators	When selected, only users with Manager or System Administrator access can use Global Search.
Only System Administrators	When selected, only System Administrators can perform global searches.

Add Ons

These settings apply to the other applications that are provided with PhonePad 5.

Appointment Calendar

These settings control the behavior of the Appointment Calendar application.



Startup Options

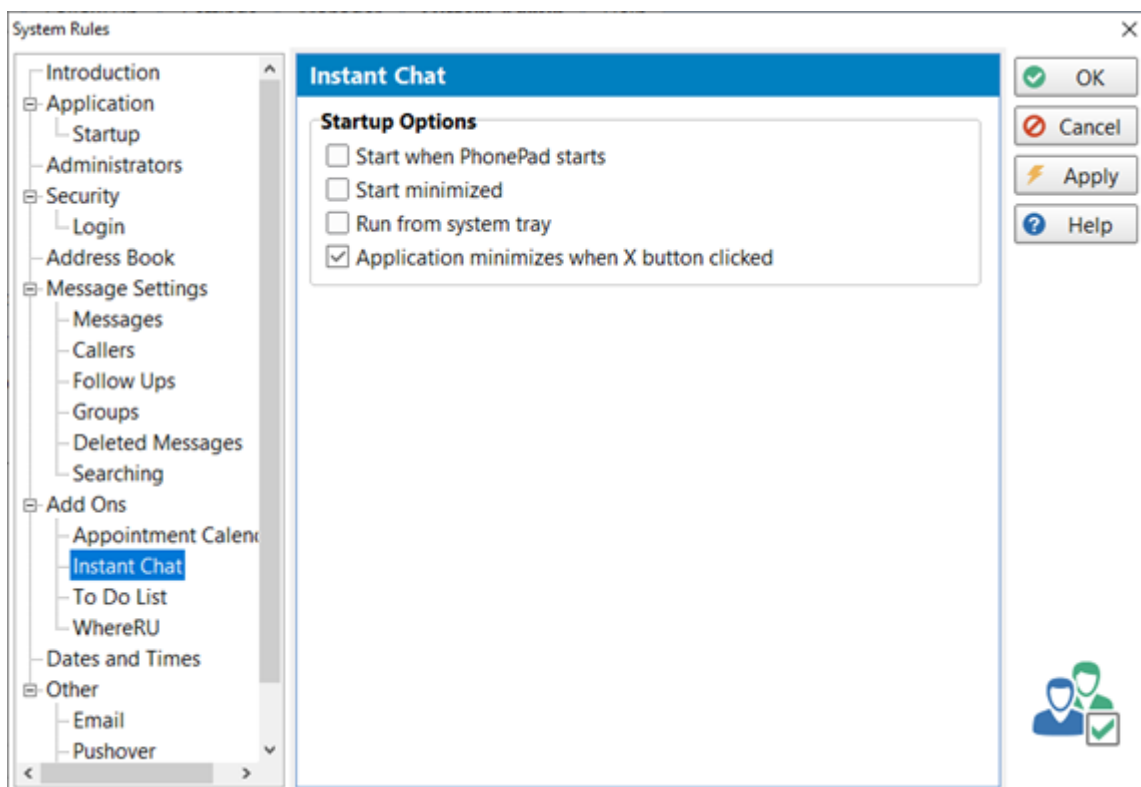
Start when PhonePad starts

When checked, Appointment Calendar will automatically open when users login to PhonePad.

Start Minimized	When checked, Appointment Calendar will start minimized.
Run from System Tray	When checked, Appointment Calendar will run from the system tray.
Application minimizes when X button clicked	When checked, Appointment Calendar will minimize when the X (close button) is clicked.

Instant Chat

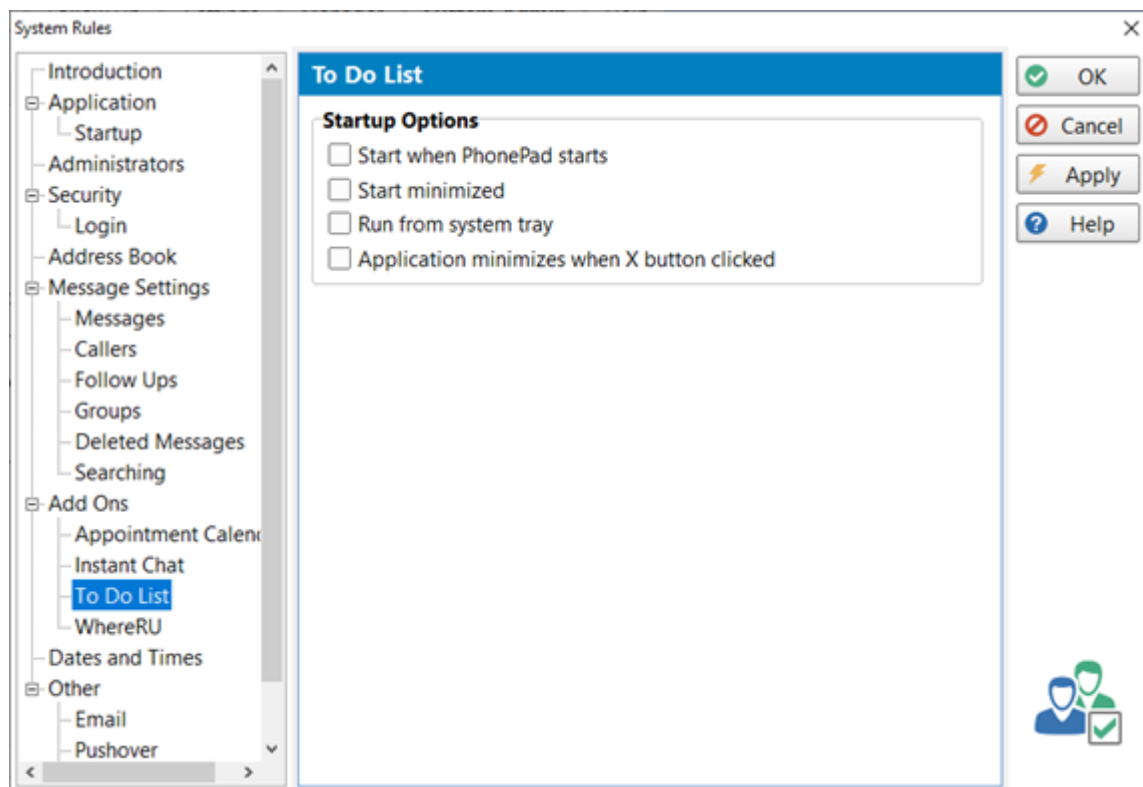
These settings control the behavior of the Instant Chat application.



Startup Options	
Start when PhonePad starts	When checked, Instant Chat will automatically open when users login to PhonePad.
Start Minimized	When checked, Instant Chat will start minimized.
Run from System Tray	When checked, Instant Chat will run from the system tray.
Application minimizes when X button clicked	When checked, Instant Chat will minimize when the X (close button) is clicked.

ToDo List

These settings control the behavior of the ToDo List application.

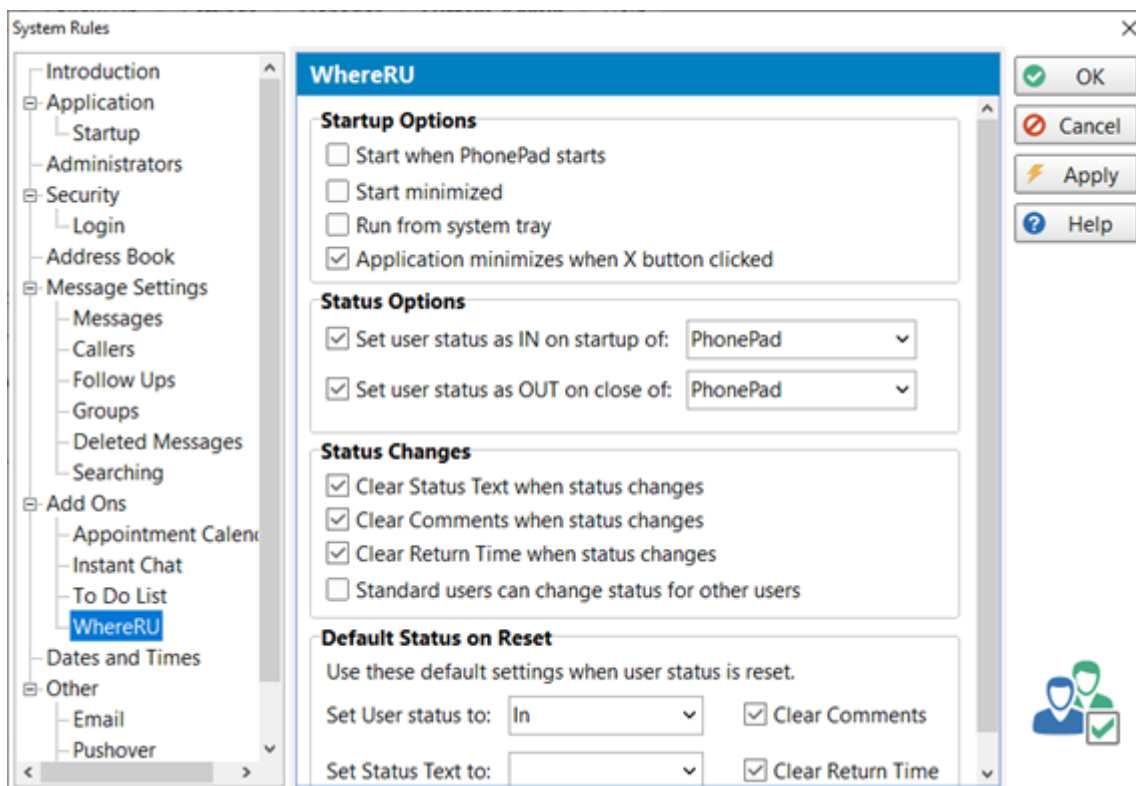


Startup Options

Start when PhonePad starts	When checked, ToDo List will automatically open when users login to PhonePad.
Start Minimized	When checked, ToDo List will start minimized.
Run from System Tray	When checked, ToDo List will run from the system tray.
Application minimizes when X button clicked	When checked, ToDo List will minimize when the X (close button) is clicked.

WhereRU

These settings control the behavior of the WhereRU application.



Startup Options

Start when PhonePad starts

When checked, WhereRU will automatically open when users login to PhonePad.

Closed when PhonePad closes

When checked, WhereRU will close when PhonePad closes.

Start Minimized

When checked, WhereRU will start minimized.

Run from System Tray

When checked, WhereRU will run from the system tray.

Application minimizes when X button clicked

When checked, WhereRU will minimize when the X (close button) is clicked.

Status Options

Set user status as IN on startup of

You can have WhereRU automatically set your availability as In whenever it starts up by checking this option. You can configure this to occur on startup of either PhonePad or WhereRU.

Set user status as OUT on close of	You can have WhereRU automatically set your availability as Out whenever it closes by checking this option. You can configure this to occur on closing of either PhonePad or WhereRU.
Status Changes	
Clear Status Text when status changes	When checked, a user's Status Text will be cleared whenever a user's status changes.
Clear Comments when status changes	When checked, a user's Comments will be cleared whenever a user's status changes.
Clear Return Time when status changes	When checked, a user's Return Time will be cleared whenever a user's status changes.
Standard users can change status for other users	When checked, standard users can change the WhereRU status for other users. If unchecked, only Managers and System Administrators can change the status.
Default Status on Reset	
Set User Status to	You can specify a default status when a user's status is reset by an administrator. The options are: In, Out, Meeting, Busy, Away.
Set Status Text to	You can specify default status text to display when a user's status is reset by an administrator. You can only select from status text that has been entered in WhereRU by an administrator.
Clear Comments	When checked, a user's comments will be cleared when a user's status is reset by an administrator
Clear Return Time	When checked, a user's return time will be cleared when a user's status is reset by an administrator

Dates and Times

The settings on this screen affect the format of the dates and times throughout PhonePad. By default, PhonePad will use your local settings as specified by Windows.

System Rules

Dates and Times

All Lists

Date Format: d/MM/yyyy

Time Format: h:mm am/pm

Sample: 22/08/2021 1:17 pm

Status Bar

Date Format: dddd, d MMMM yy

Time Format: h:mm am/pm

Sample: Sunday, 22 August 2021 1:17 pm

OK Cancel Apply Help

All Lists

Date Format

Select or type in a date format that you would like to be displayed in all lists in PhonePad 5.

A sample will be displayed below

Time Format

Select or type in a time format that you would like to be displayed in all lists in PhonePad 5.

A sample will be displayed below

Status Bar

Date Format

Select or type in a date format that you would like to be displayed in the status bar on the main window.

A sample will be displayed below

Time Format	Select or type in a time format that you would like to be displayed in the status bar on the main window. A sample will be displayed below
--------------------	---

It is recommended you only use the following format specifiers when specifying date and time formats. Using anything else may produce unusual results.

Date Specifiers

d	Displays the day as a number without a leading zero (1-31).
dd	Displays the day as a number with a leading zero (01-31).
ddd	Displays the day as an abbreviation (Sun-Sat).
dddd	Displays the day as a full name (Sunday-Saturday).
m	Displays the month as a number without a leading zero (1-12).
mm	Displays the month as a number with a leading zero (01-12).
mmm	Displays the month as an abbreviation (Jan-Dec).
mmmm	Displays the month as a full name (January-December).
yy	Displays the year as a two-digit number (00-99).
yyyy	Displays the year as a four-digit number (0000-9999).
/	Date separator.

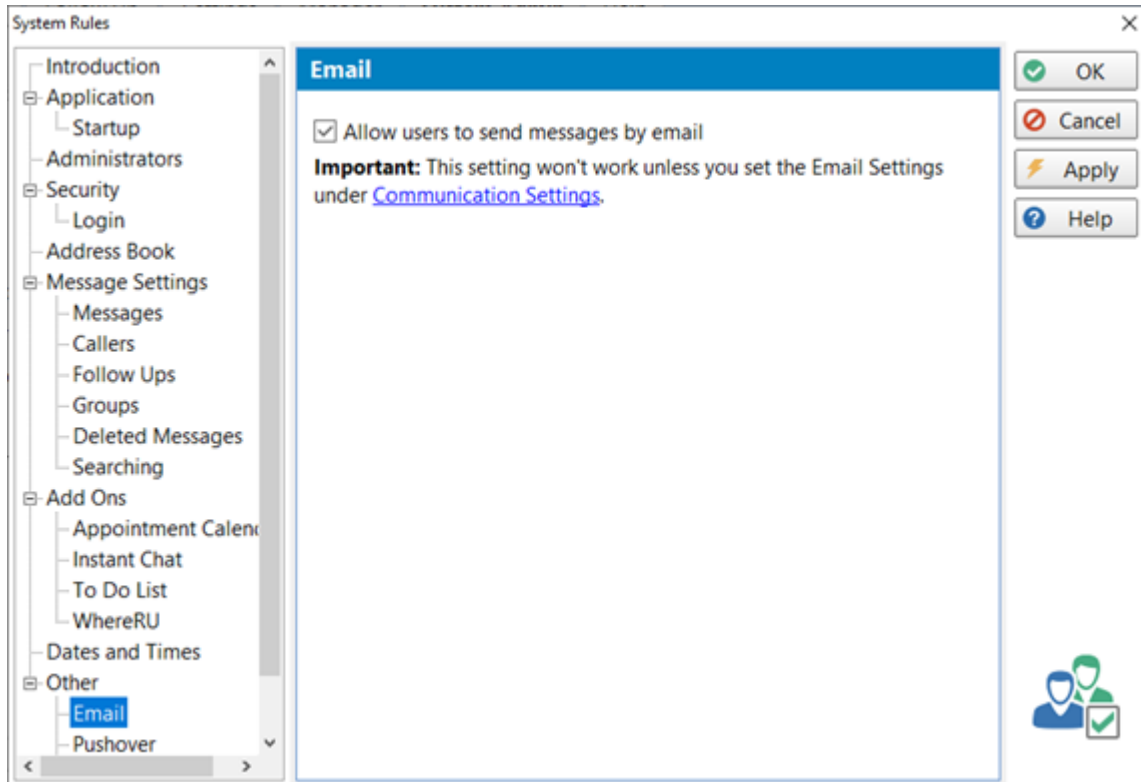
Time Specifiers

h	Displays the hour without a leading zero (0-23).
hh	Displays the hour with a leading zero (00-23).
m	Displays the minute without a leading zero (0-59).
mm	Displays the minute with a leading zero (00-59).
s	Displays the second without a leading zero (0-59).
ss	Displays the second with a leading zero (00-59).
am/pm	Displays the time in 12 hour format with an am or pm.
:	Time separator.

Other

Email

These settings control access to users forwarding messages via Email.



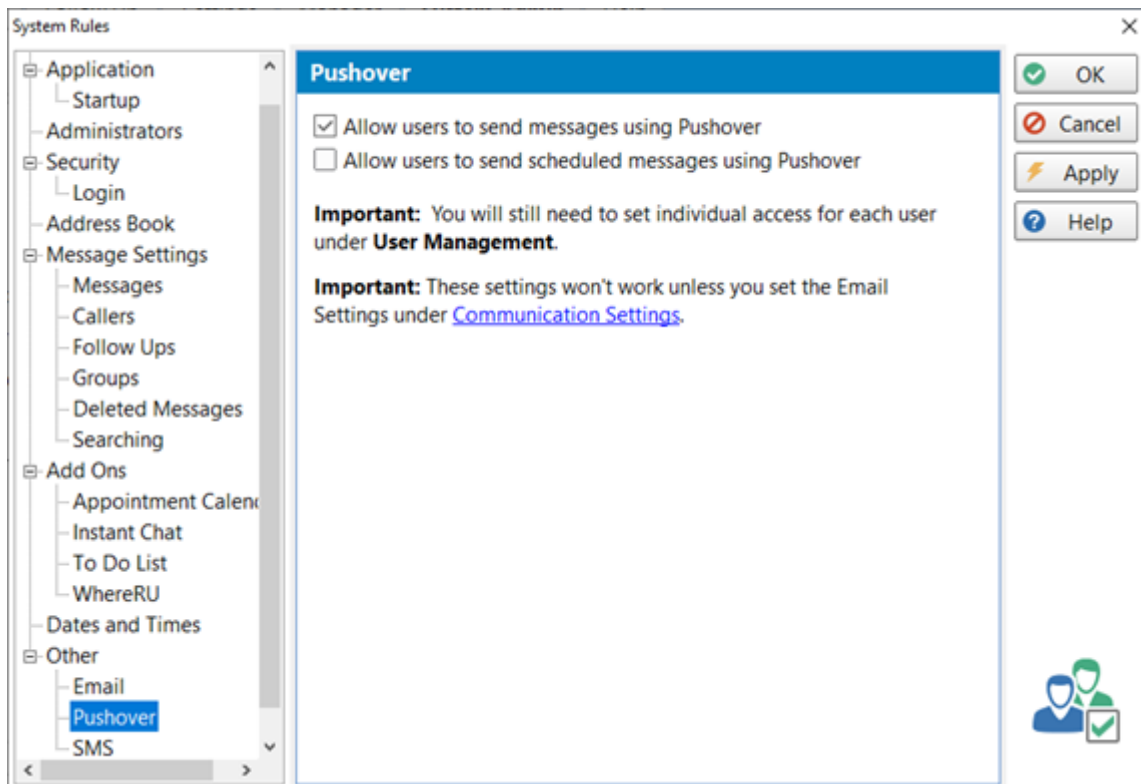
Allow users to send messages by email	When checked, users can email messages using the Email Message option on the File menu.
--	---



Make sure you don't forget to set the **Email Settings** under **Communication Settings**. PhonePad needs to know your email account settings before it can send any emails.

Pushover

These settings control access to users sending quick messages via Pushover.

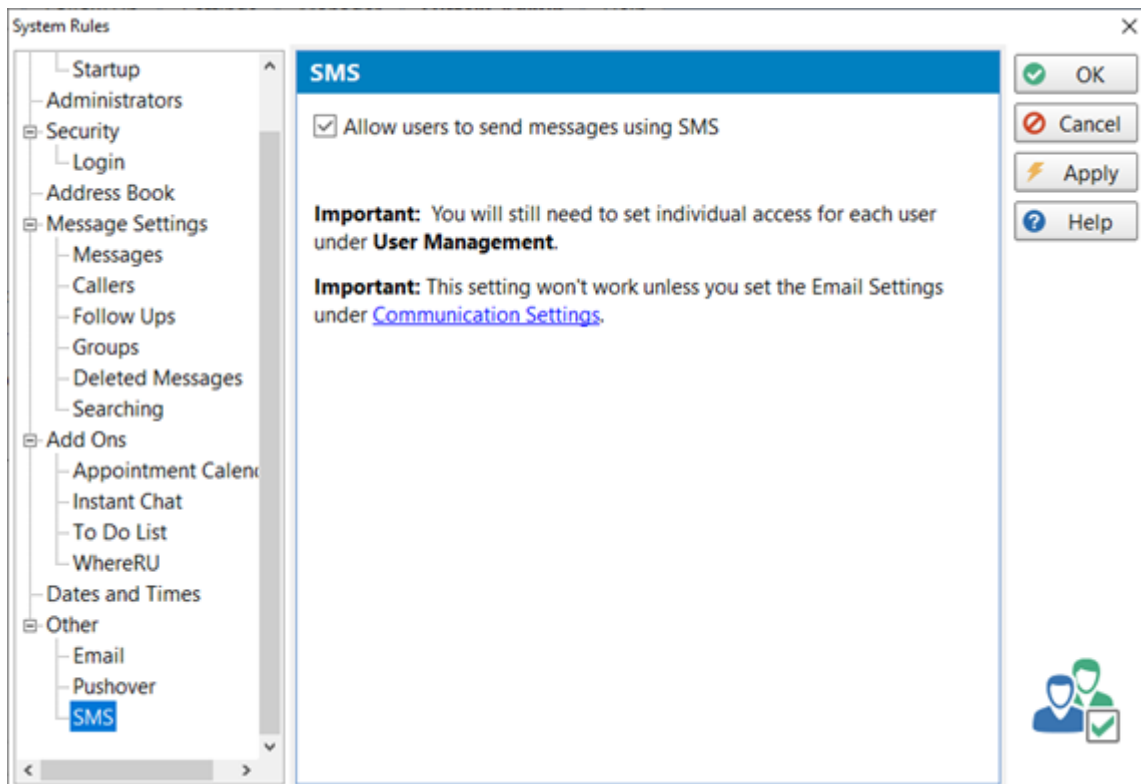


Allow users to send messages using Pushover	When checked, users can send quick messages via Pushover. This allows you to enable/disable this feature for all users system-wide. You will still need to grant users access individually under User Management .
Allow users to send scheduled messages using Pushover	When checked, users can schedule messages to be sent at a specified date and time.

 Make sure you don't forget to set the **Pushover Settings** under **Communication Settings**.

SMS

These settings control access to users sending quick messages via SMS.



Allow users to send messages using SMS

When checked, users can send quick messages using SMS. This allows you to enable/disable this feature for all users system-wide. You will still need to grant users access individually under **User Management**.

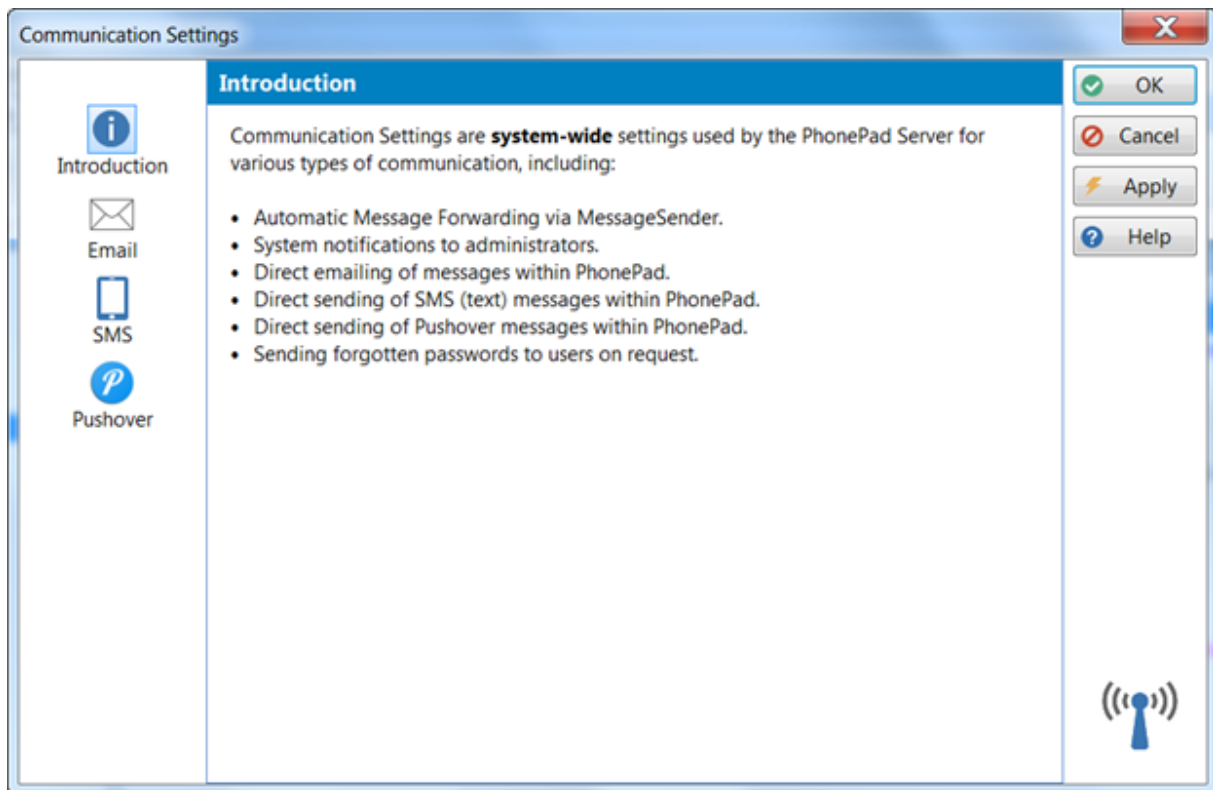


Make sure you don't forget to set the **SMS Settings** under **Communication Settings**.

Communication Settings

The Communication Settings window is an important part of PhonePad. These settings are required for MessageSender and other features, including some that are yet to be added.

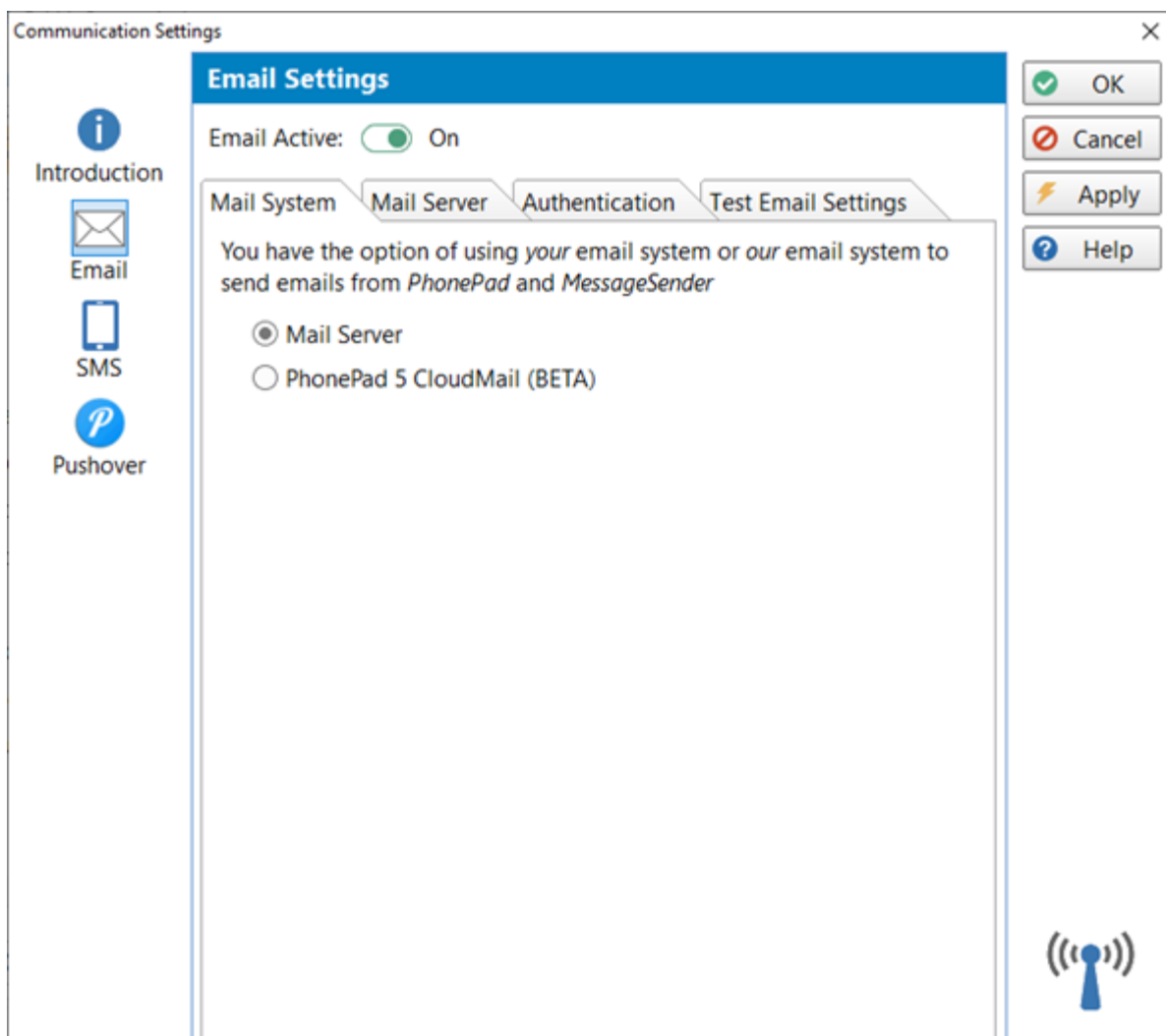
To access the Communication Settings, select the **System Admin** tab and click on the **Communication Settings** button, or select **Communication Settings** from the **System Admin** menu.



Email

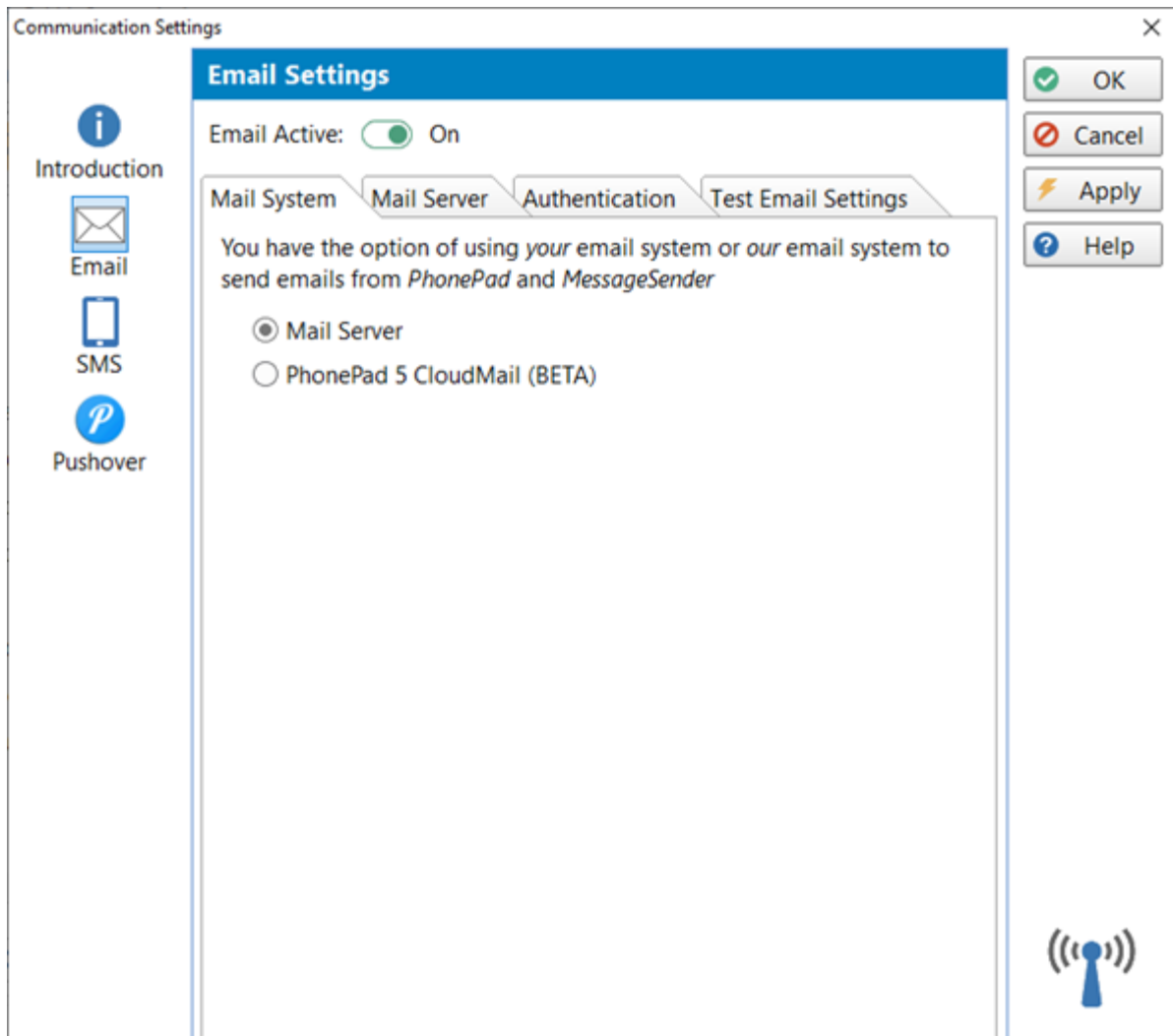
These email account details will be used for all email communication in PhonePad and MessageSender (if you have it installed).

There are two ways to send email messages: using your own mail server (**SMTP Server**) or using ours (**CloudMail**).



SMTP Server

If you select **SMTP Server** there are 3 tabs: **Mail Server**, **Authentication** and **Test Email Settings**.



Mail Server

You will need to fill in details of your mail server and an email account to use for sending all emails from. Many users create a special email account for this purpose.

Communication Settings

Email Settings

Email Active: ☒ On ☒ Enable Replies

Mail System Mail Server Authentication Test Email Settings

Mail Server

SMTP Server: smtp.gmail.com

SMTP Port: 465

SMTP POP

Email Account

Account Username: xyz@gmail.com

Account Password:

Confirm Password:

☐ Username and Password Not Required

Sender Details

Sender Name: PhonePad 5

Sender Email: xyz@gmail.com

Use an email service preset: Gmail AT&T Gmail GoDaddy Optus Outlook.com/Office 365 Telstra Verizon

Apply Preset

OK Cancel Apply Help

Active	When checked, emails can be sent using the account information on this screen.
Mail Server	
SMTP Server	This is the name of your mail server, mail.myserver.com or smtp.myserver.com.
SMTP Port	The port used by your mail server, eg. 25, 465, etc.
Email Account	
Account Username	The account name is typically an email address, eg. john@xyzcorp.com
Account Password	Enter the password for the account.
Confirm Password	Enter the password again.

Username and Password Not Required	Check this box if your email system does not require a Username and Password.
Sender Details	
Sender Name	This can usually be anything you like.
Sender Email	This is the email address for the account you are using to send messages. In most cases this should be the same email address as the one used for Account Username.
Use an email service preset	<p>Use the drop-down list to select an email service provider, then click the Apply Preset button. This will change the settings to suit the provider you are using. All you need to do then is enter your account details (eg. Account Username/Email Address and Password).</p> <p>These are settings we have tested, or that have been tested by customers, and are known to work. More presets will be added over time. If you are using an email provider not listed and you have settings that have been proven to work, please let us know and we'll add them.</p>

Authentication

There are a wide range of mail servers on the Internet and all of them require you to authenticate your connection. Unfortunately not all mail servers use the same authentication protocols so it can be a bit of a challenge to find out what your mail server requires.

PhonePad includes 3 authentication method: **Automatic**, **Manual - Method A**, and **Manual - Method B**. These are actually *3 complete email systems* built in to PhonePad (and MessageSender). Hopefully with such a broad range of authentication methods at least one of them will work with your mail server.

The **Automatic** option will attempt to connect to your mail server and try to automatically determine which authentication method to use. If it is unable to work this out then you will need to try the manual methods.

Communication Settings

Email Settings

☐ Active

Mail Server Authentication Test Email Settings

Authentication Method

☒ Automatic
 ☒ SSL Connection

☐ Manual - Method A
 ☒ EHLO

☐ Manual - Method B
 ☐ ESMTP

☒ Pass Through

Manual Settings

Method A

☒ User Password
 ☐ CRAM MD5
 ☐ NTLM
 ☐ Kerberos

Method B

☐ SASL
 ☐ SASL Only

Transport Layer Security (TLS)

☒ No TLS
 ☐ Explicit

☐ Automatic
 ☐ Implicit

☐ SSL 2
 ☐ TLS

☐ SSL 3
 ☐ TLS 11

☐ TLS 12

OK Cancel Apply Help

Authentication Method

Automatic

When selected, the email system will automatically try to determine the authentication used by your mail server and then connect using those settings.

If the Automatic method is unable to work out what authentication requirements your mail server has then try the manual methods. The two manual methods have different authentication settings

Manual - Method A

When selected, you will be able to use one of the authentication methods listed under **Method A**.

Manual - Manual B

When selected, you will be able to use one of the authentication methods listed under **Method B**.

SSL Connection	Check this check box only if your mail server requires a secure connection.
EHLO	It's recommended that you have this option checked as it enables the email system to work out what capabilities your mail server has. This is used in determining its authentication requirements.
ESMTP	Some mail servers support Extended SMTP so try checked and unchecked.
Pass Through	Check this check box if automatic authentication doesn't work.

Method A

These authentication settings apply when you have **Manual - Method A** selected. You can choose from:

- User Password
- CRAM MD5
- NTLM
- Kerberos
- XO AUTH 2

Method B

These authentication settings apply when you have **Manual - Method B** selected. You can choose from:

- SASL
- SASL Only
- No TLS
- Automatic TLS
- Implicit TLS
- Explicit TLS
- SSL2
- SSL3
- TLS
- TLS11
- TLS12

Test Email Settings

You can test both automatic and manual authentication settings under the **Test Email Settings** tab.

The screenshot shows the 'Communication Settings' dialog box with the 'Email Settings' section active. The 'Test Email Settings' tab is selected. The 'Email Active' toggle is turned 'On'. The 'To' field contains 'xyz@gmail.com' and the 'Subject' field contains 'Test Email from PhonePad 5.'. A 'Send' button is next to the 'To' field. Below the subject field is a 'Response' area showing the output of the test. The response text is as follows:

```
AUTOMATIC AUTHENTICATION
SMTP Server      : smtp.gmail.com
SMTP Port        : 465
SMTP Username    : xyz@gmail.com
SMTP Password    : <encrypted>
SSL Connection   : Yes
EHLO             : Yes

Sending test message to xyz@gmail.com

Connected.
SIZE 52428800
8BITMIME
PIPELINING
AUTH PLAIN LOGIN
HELP
```

On the right side of the dialog, there are buttons for 'OK', 'Cancel', 'Apply', and 'Help'. A wireless signal icon is located at the bottom right of the dialog box.

The test emails will be sent to the sender email address, however you can change this if you like.

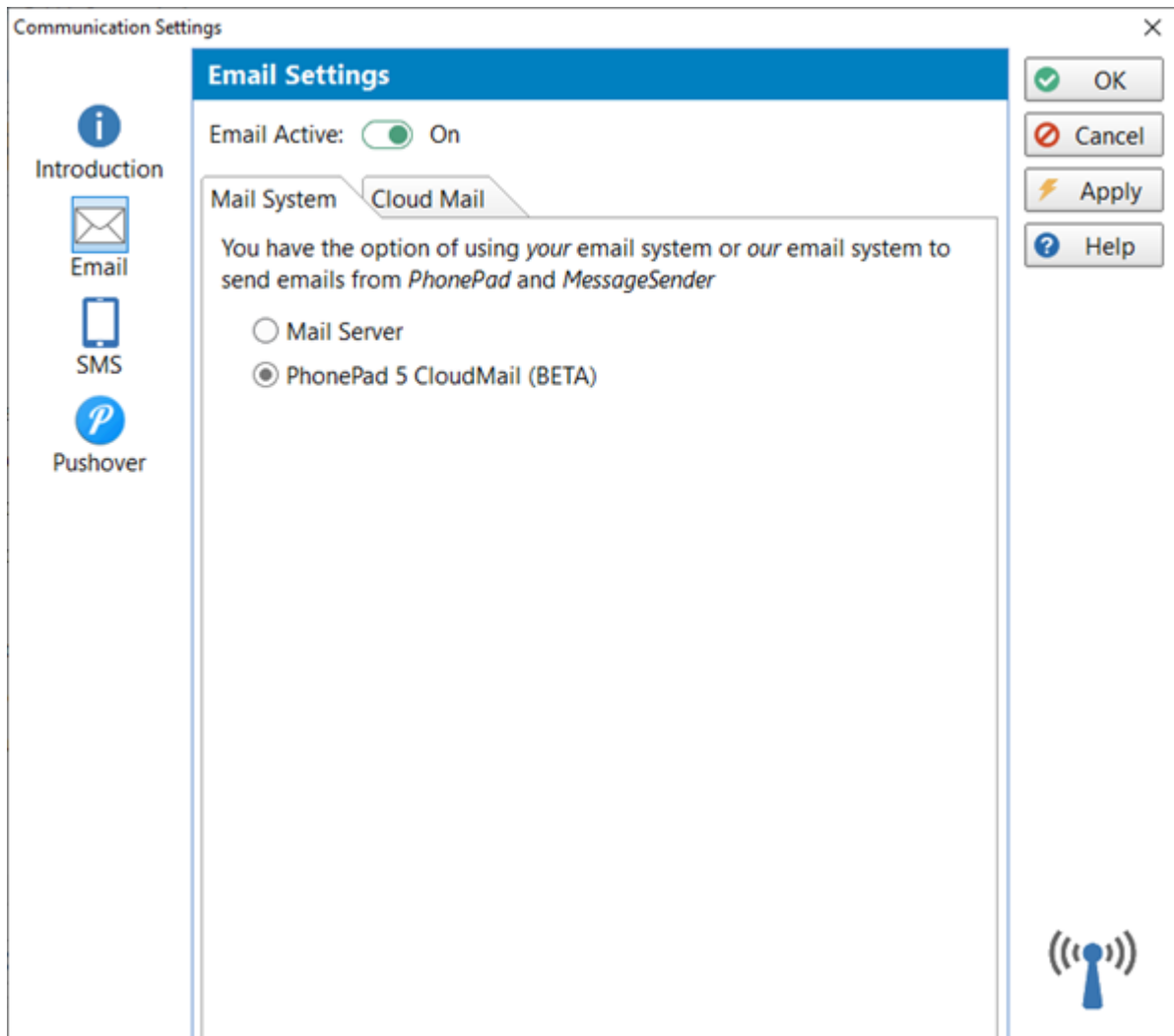
Click the **Send** button to send a test message using the mail server and authentication settings you have chosen. If your mail server accepts the test message you should receive it in the Inbox of the email address you entered.

The **Response** area will show the response received from your mail server. If you don't receive the test email then check the response area as it may contain error messages and/or suggestions from your mail server.

You may need to experiment with the authentication settings until you get it to work.

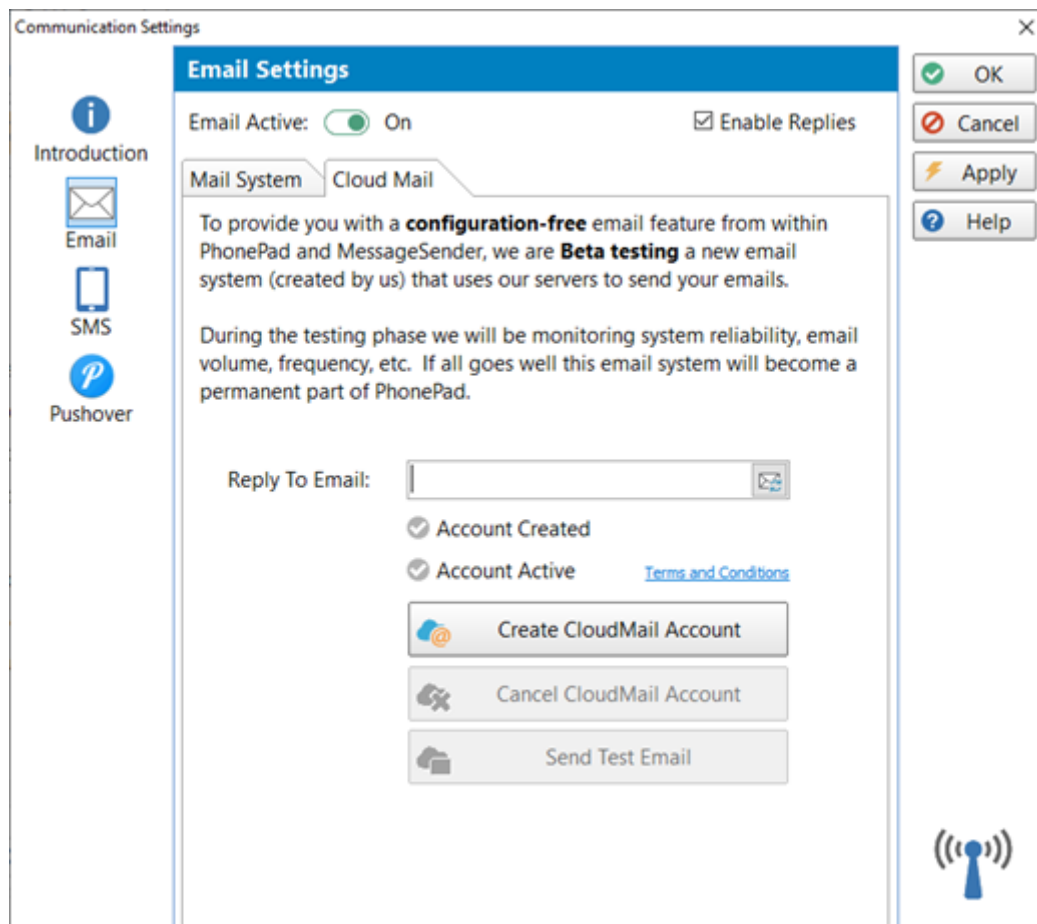
CloudMail

If you select **CloudMail** there is only 1 tab: **CloudMail**.



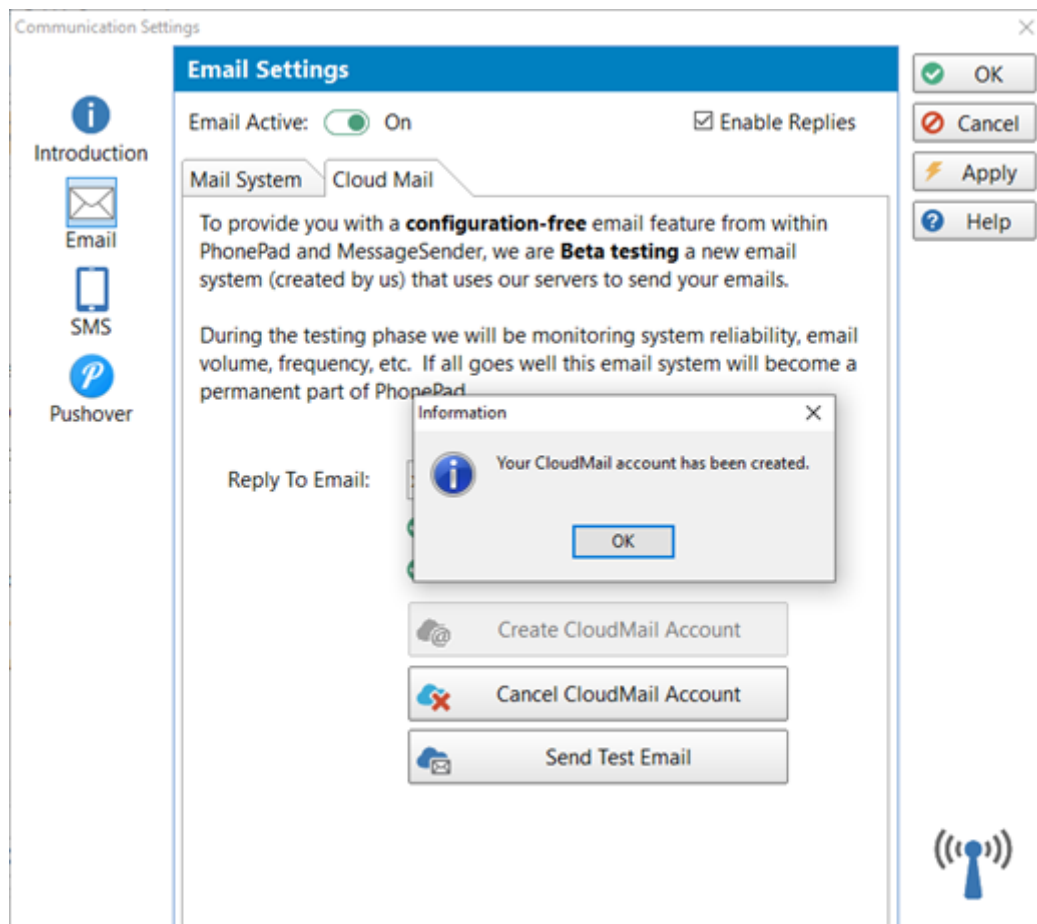
CloudMail Settings

Unless you have registered an account with the CloudMail server, the **Account Created** and **Account Active** check marks will be grayed out. This indicates that no account exists.



To use CloudMail you will need to create an account:

1. Enter an email address under **Reply To Email**. This is important, otherwise the recipients of your emails will be unable to reply.
2. Click the **Create CloudMail Account** button.
3. If all goes well the following message will be displayed.



4. Click the **OK** button.
5. The **Account Created** and **Account Active** check marks should be green.

Communication Settings

Email Settings

Email Active: ☒ On ☒ Enable Replies

Mail System Cloud Mail

To provide you with a **configuration-free** email feature from within PhonePad and MessageSender, we are **Beta testing** a new email system (created by us) that uses our servers to send your emails.

During the testing phase we will be monitoring system reliability, email volume, frequency, etc. If all goes well this email system will become a permanent part of PhonePad.

Reply To Email:

✓ Account Created

✓ Account Active [Terms and Conditions](#)

Create CloudMail Account

Cancel CloudMail Account

Send Test Email

OK Cancel Apply Help

Buttons

Create CloudMail Account

Creates a CloudMail account.

Cancel CloudMail Account

Cancels (and deletes) your CloudMail account.

Send Test Email

Sends a test email to the Reply to Email address so you can verify the account is working correctly.



If you need to change the **Reply To Email** at any time, just enter a new email address and click the small button to the right of this field. PhonePad will connect to the CloudMail Server and update the email address.



CloudMail is in **Beta** right now. At the end of Beta testing, if we go ahead with this service it will probably be available on a subscription basis although at low cost.

Please click the **Terms and Conditions** link to view further information.

SMS

Before you can send anything via SMS you will need to open an account with an SMS gateway. In this release of PhonePad 5 only two SMS gateways are provided, however we plan to add a few more over the next couple of months.

Communication Settings

SMS Settings

Active: ☒ On SMS Provider: SMS Global

Account Details

Username: XYZCorp Test

Password: ••••••

Confirm: ••••••

Account ID:

Gateway Settings

Gateway URL: <http://www.msgglobal.com/http-api.php?action=se>

[SMS Global Website](#)

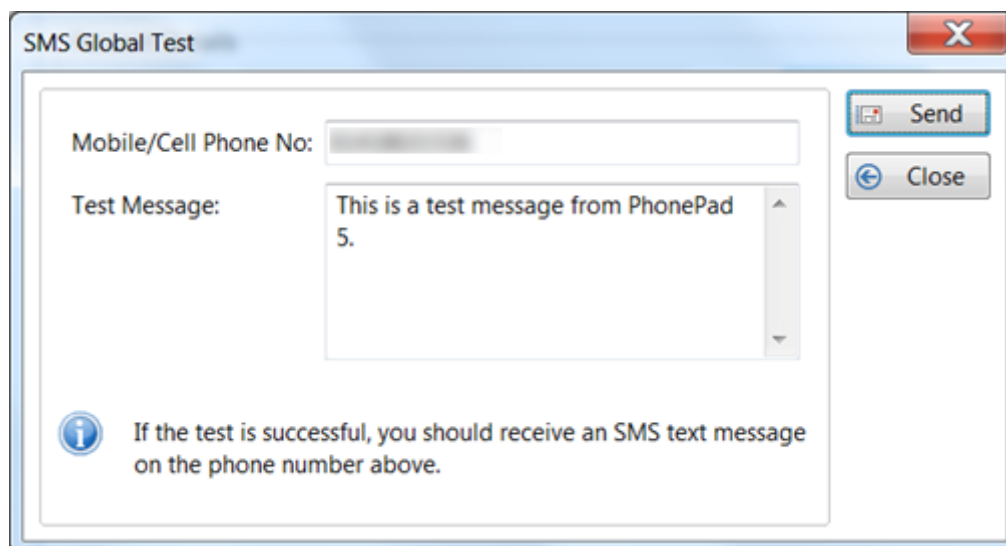
OK Cancel Apply Help

Select the SMS Provider you have an account with from the drop-down list, then enter your account details in the fields provided. The fields you need to fill in will vary with each provider.

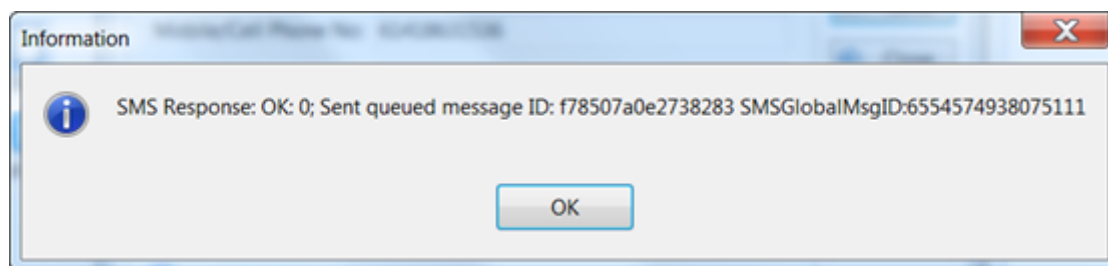
The Gateway URL should remain as is, unless we instruct you to change it.

Messages can only be sent if the **Active** check box is checked.

You can make sure everything is set up correctly by clicking the **Test** button. Enter a cell/mobile number (including the country code) and click **Send**. You can change the default message text if you wish.



You should get a message from the SMS Gateway provider if all went well, or if there were problems. The message you get back will vary from provider to provider.

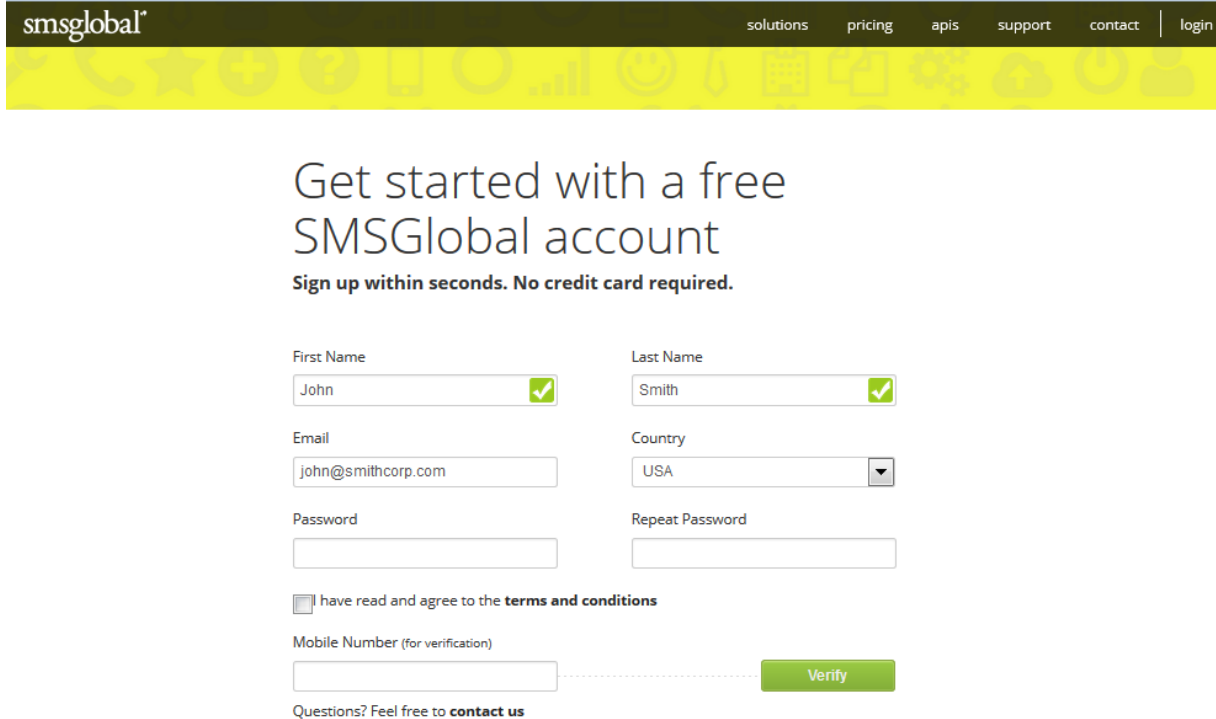


Setting Up SMS Global

SMS Global provide SMS gateway services for most countries via their MXT web messaging platform. It costs nothing to set up an account with them. It works on a credit system where you purchase the number of message credits, so you only pay for the SMS messages you send.

Setting Up an Account with SMS Global

1. Go to the SMS Global website: www.msglobal.com/sign-up
2. Fill in your details to create your account.



The image shows the SMSGlobal account creation page. At the top is a dark green navigation bar with the SMSGlobal logo on the left and links for solutions, pricing, apis, support, contact, and login on the right. Below the navigation bar is a yellow banner with various communication icons. The main heading is "Get started with a free SMSGlobal account" followed by the subtext "Sign up within seconds. No credit card required." The form consists of several fields: First Name (John), Last Name (Smith), Email (john@smithcorp.com), Country (USA), Password, and Repeat Password. There are green checkmarks next to the First Name and Last Name fields. Below the password fields is a checkbox for "I have read and agree to the terms and conditions". At the bottom, there is a Mobile Number field for verification and a green "Verify" button. A link for "Questions? Feel free to contact us" is at the very bottom.

First Name: John ✓

Last Name: Smith ✓

Email: john@smithcorp.com

Country: USA

Password:

Repeat Password:

☐ I have read and agree to the [terms and conditions](#)

Mobile Number (for verification):

[Verify](#)

Questions? Feel free to [contact us](#)

3. If you are in the US please note that the country will be listed as USA, not United States.
4. Once your account is set up, select Store from the menu on the left.
5. You can purchase some SMS credits by entering a currency amount and clicking the Buy button, or by selecting a plan.

Store

Top up your account, purchase additional features and view your billing history.

Select Items **Payment Details**

Quick Top Up

40 **Buy**

Estimator **Messages** **Extras**

Choose how many messages you'd like to buy, and compare message rates on each pricing plan

How Many?

1000 SMS Messages

USA

All **Add Destination**

Choose your pricing plan

BASIC	ADVANCED	BUSINESS	ENTERPRISE
\$0.00 per month	\$50.00 per month	\$150.00 per month	\$300.00 per month
\$0.04 per message	\$0.035 per message	\$0.031 per message	\$0.028 per message

Promo Code

Enter the Promo Code here.

Cancel **Next**

6. The cell/mobile number you verified will be used in MessageSender as the **Account ID** (see Tools/Verified Numbers).

Tools

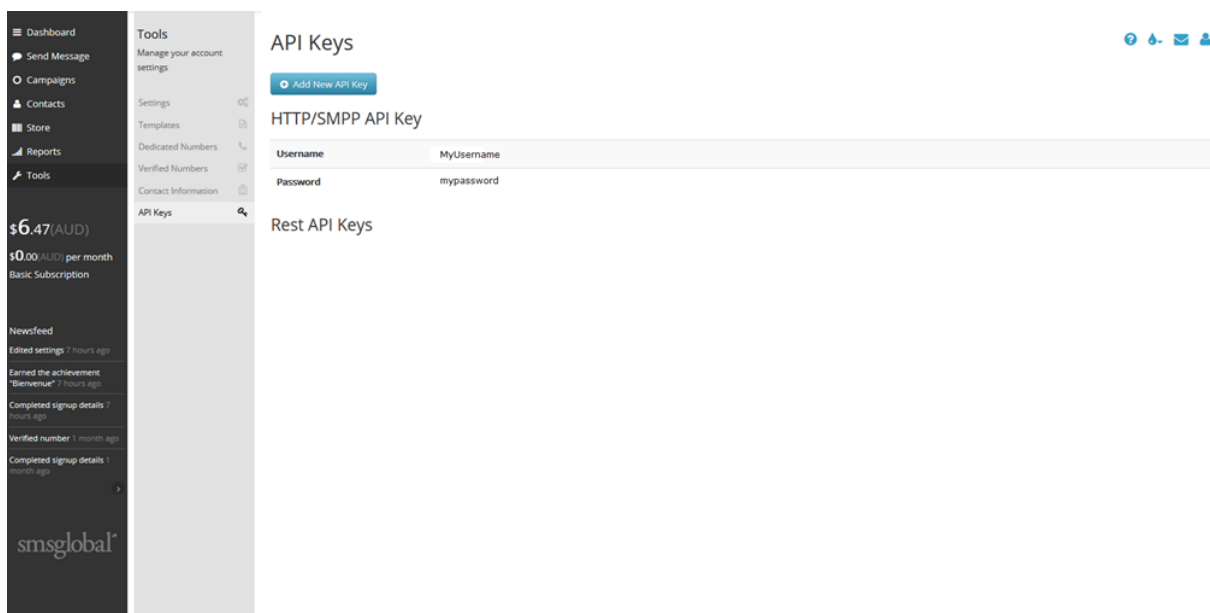
Manage your account settings

Verified Numbers

Add

Number	Status	Actions
999 555 6666	✓	Verify Delete

7. Select **Tools/API Keys** and add an API Key for HTTP.



8. The **Username** and **Password** will be used in the MessageSender settings.



Please note that these screens and instructions may have changed since the publication of this user guide.

Setting Up Clickatell

Clickatell provide SMS gateway services for most countries via their web messaging platform. It costs nothing to set up an account with them. It works on a credit system where you purchase the number of message credits, so you only pay for the SMS messages you send.

Setting Up an Account with Clickatell

1. Go to the Clickatell sign up page: <https://www.clickatell.com/register>
2. Select Developers' Central.
3. Choose an option appropriate for your country.
4. Complete the details requested.

Clickatell
Mobile Touch. Multiplied.

Login > GET STARTED FOR FREE 24/7 HELP CHAT

Home SMS PRODUCTS PRICING & COVERAGE APIs & SCRIPTS RESOURCES

You are here: Home > Sign up for an account with Clickatell

Sign up for an account with Clickatell

No matter whether you are sending out high volumes of SMS messages in one go or if you need your SMS messages to be sent when specific triggers occur, we have a product that is right for you. Click on one of the products below to register.

Which product would you like to sign up for?

Communicator2
Send bulk SMS via the internet. No programming needed.

Developers' Central
Reliable, scalable, customisable. Integrates with your system via APIs.

Which product is right for me?
How much will it cost?

Where would you like to send messages to?

Anywhere in the World
International excl US Free signup
I want to send fewer than 10,000 messages per month to the Americas

Special Offers: One Country only
South Africa Free signup
UK Free signup
Ireland Free signup
India Free signup
Why special?

What is your first name? *
John ✓

What is your last name? *
Smith ✓

5. Once you have set up your account, select *Set Up a New API* from the *APIs* menu.

Clickatell
Mobile Touch. Multiplied.

Developers' Central 397.00 CREDITS AVAILABLE Buy credits >

Home APIs Receive Messages Message Reports Credits & Payments

Manage APIs >
Set up a new API >

past month

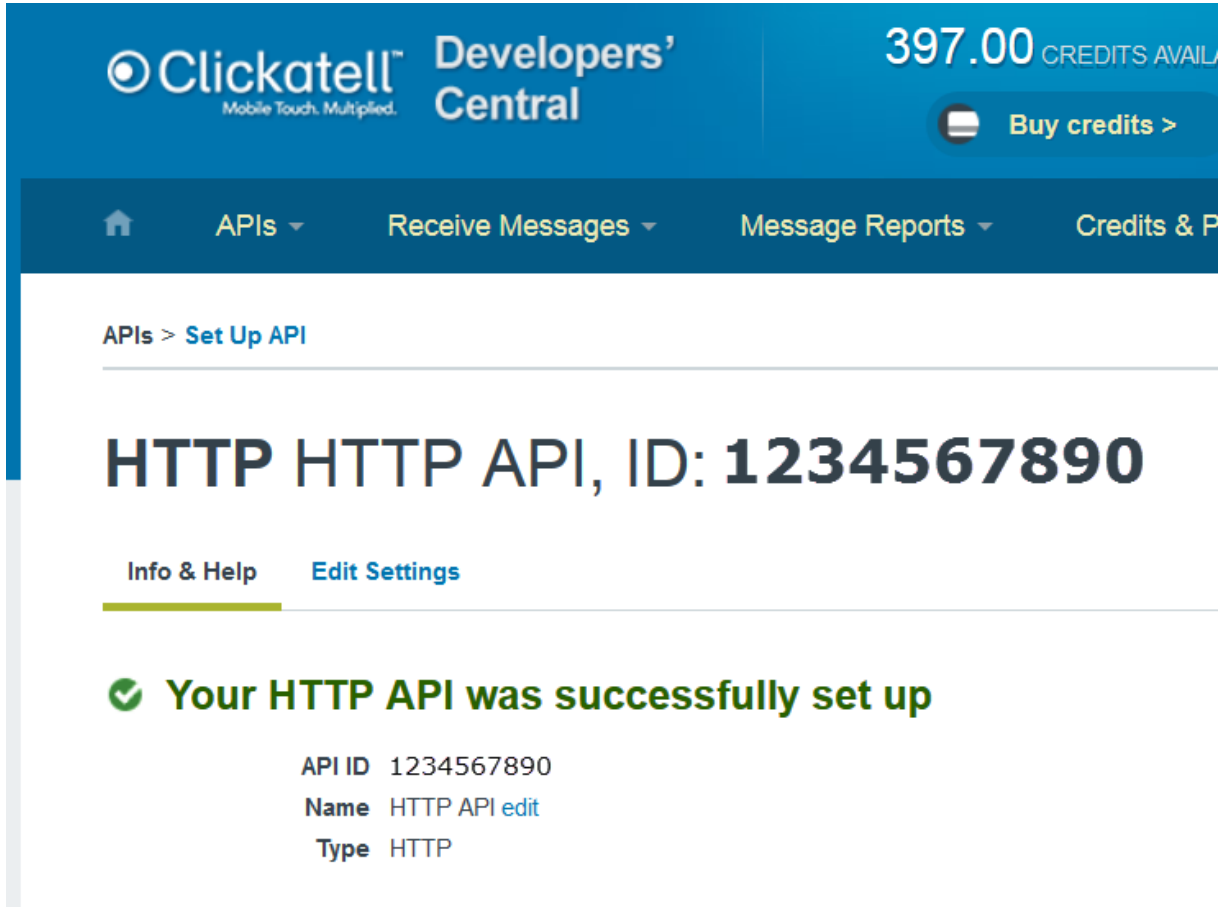
Excluded Included

& F

6. Click the Add HTTP API button.

The screenshot shows the Clickatell Developers' Central interface. The top navigation bar includes the Clickatell logo, 'Developers' Central', a balance of 397.00 CREDITS AVAILABLE, and links for 'Buy credits >' and 'Manage account'. Below this is a secondary navigation bar with links for 'APIs', 'Receive Messages', 'Message Reports', 'Credits & Payments', and 'Help'. The main content area is titled 'APIs > Set up a new API' and features a section 'Add a free API' with a description: 'Our APIs are free. Add as many as you like. Fast, simple and reliable, they are built to integrate with any system or application. All our APIs communicate securely with Clickatell.' Below this is a section for 'Messaging APIs' with the heading 'For sending real-time messages' and a list of bullet points: 'Ideal for delivering OTP, PIN and password reset alerts', 'Instant delivery from your system to any handset', and 'For sending between 1 and 100 messages at a time'. Underneath, there is a section for 'HTTP' APIs, described as 'Simple, fast and reliable. Used as an HTTP/Internet Post'. It states: 'The HTTP API can be used with practically any web service or application and is one of the simpler ways to connect to the Clickatell Gateway.' A link for 'MORE INFO' is provided. An orange arrow points to a yellow button labeled 'Add HTTP API'.

7. Record the API ID. You will need this for setting up MessageSender.



The screenshot displays the Clickatell Developers' Central interface. At the top, the Clickatell logo is on the left, and the text '397.00 CREDITS AVAILABLE' is on the right, with a 'Buy credits >' button. Below this is a navigation bar with links: Home, APIs, Receive Messages, Message Reports, and Credits & Payments. The main content area shows the breadcrumb 'APIs > Set Up API'. The title 'HTTP HTTP API, ID: 1234567890' is prominently displayed. Below the title are two tabs: 'Info & Help' (selected) and 'Edit Settings'. A green checkmark icon precedes the message 'Your HTTP API was successfully set up'. Below this message, the API details are listed: API ID 1234567890, Name HTTP API (with an edit link), and Type HTTP.

Clickatell™ Mobile Touch. Multiplied. Developers' Central

397.00 CREDITS AVAILABLE [Buy credits >](#)

[Home](#) [APIs](#) [Receive Messages](#) [Message Reports](#) [Credits & Payments](#)

[APIs](#) > [Set Up API](#)

HTTP HTTP API, ID: 1234567890

[Info & Help](#) [Edit Settings](#)

✓ **Your HTTP API was successfully set up**

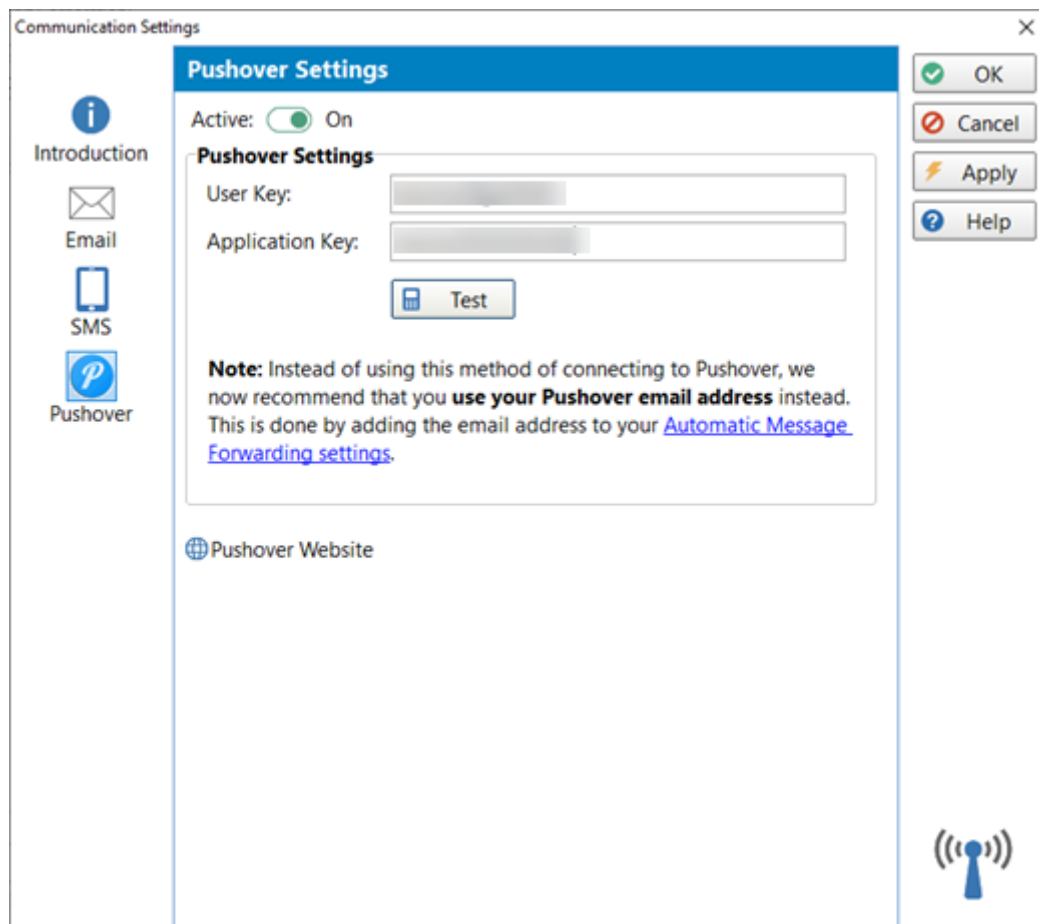
API ID 1234567890
Name HTTP API [edit](#)
Type HTTP



Please note that these screens and instructions may have changed since the publication of this user guide.

Pushover

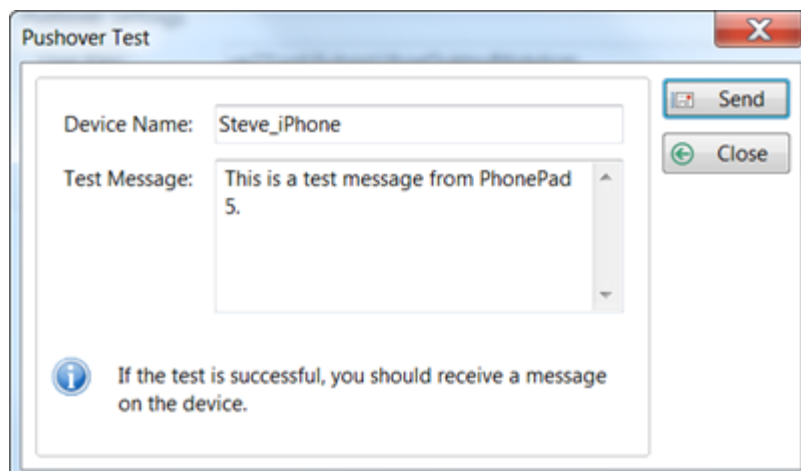
PhonePad 5 also has the ability to send messages via the Pushover service. This service provides up to 7500 free messages per month.



Enter your Pushover **User Key** and **Application Key** in the fields provided.

Messages will be sent only if the **Active** check box is checked. Devices you send messages to must be under the same Pushover account.

You can use the **Test** button to make sure everything is working ok.





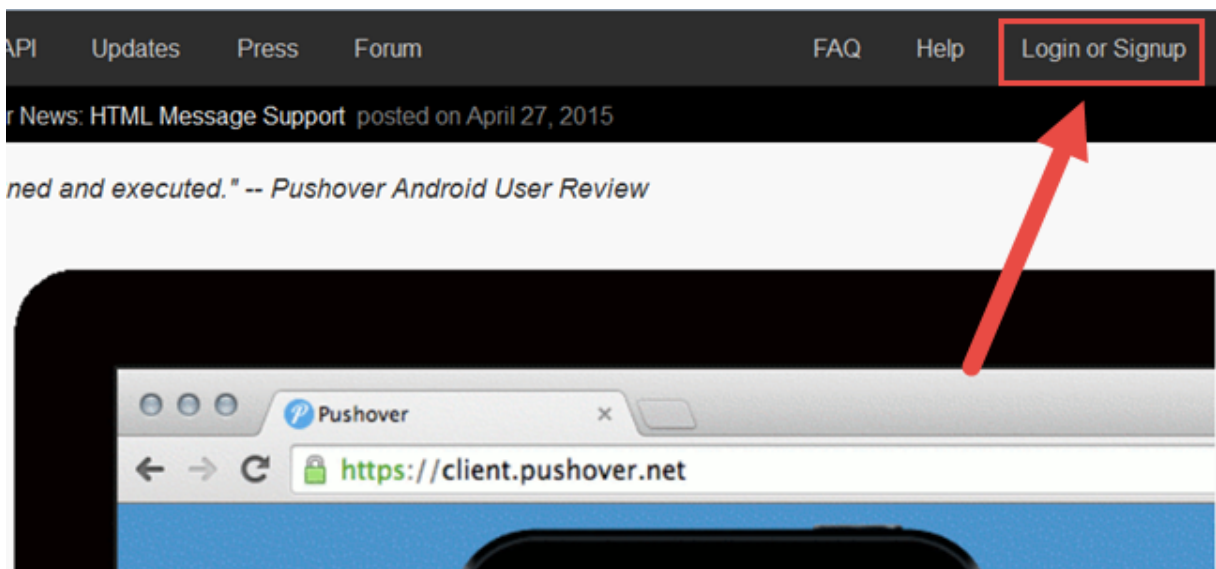
When you create an account with Pushover you also get an email address. We now recommend that you use the email address under Automatic Message Forwarding settings instead of using User Keys and Application Keys. It is much easier to set up.

Setting Up Pushover

Pushover provides an easy way of sending text messages without using an SMS network. Currently you can send 7500 text messages per month for free with Pushover and MessageSender.

Setting Up an Account with Pushover

1. Go to the Pushover website: www.pushover.net
2. Locate the **Login** or **Signup** link.



1. Once your account has been set up, you will receive a **User Key**.

Your User Key

To receive notifications from a Pushover-powered [application](#), service, or website, just supply your user key:

To receive Pushover notifications from e-mails, [send an e-mail to](#):

2. Copy and paste the **User Key** to the **User Key** field on the Pushover settings screen in MessageSender.
3. You will need to register MessageSender as one of your applications. Scroll down until you get to the **Your Applications** section.
4. Click **Register an Application**.

Your Applications [\(Register an Application\)](#)

Name	Description
 TextMessenger	Send text messages from your desktop or laptop.

Your Delivery Groups [\(Create a Group\)](#)

No delivery groups created yet. [Want to create one?](#)

5. The **Create New Application/Plugin** page will be displayed.

Pushover Android, iOS, & Desktop Apps & Plugins API Updates Press Forum FAQ Help Settings

Latest Pushover News: [HTML Message Support](#) posted on April 27, 2015

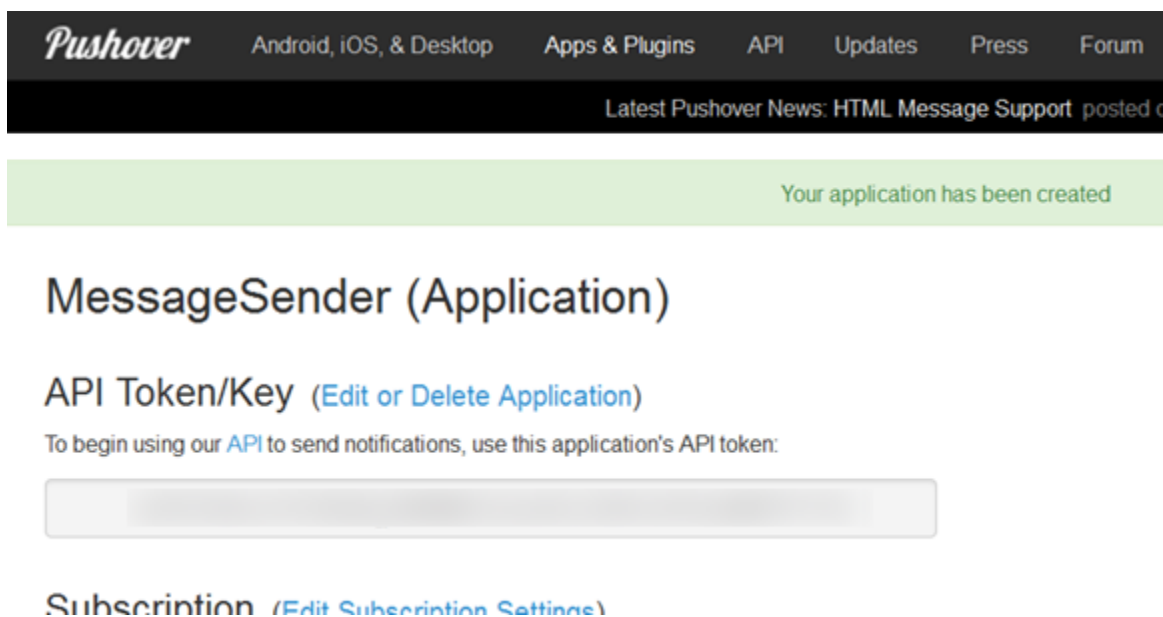
Create New Application/Plugin

To start pushing notifications with Pushover, you'll need to create an Application and get a unique [API key](#). Each website, service, application, plugin, etc. may only be registered once. Applications are currently limited to 7,500 messages per month. Additional message capacity may be purchased after creating an application. For more on monthly limits, see [Limits](#).

Application Information

- 1 Name:**
This name should be short (20 character maximum), such as "Nagios", "Adium", or "Network Monitor". If messages are sent with no title, this displayed. Cannot be changed once created.
- 2 Type:**
- 3 Description:**
URL:
If this is a public app/plugin, you can include a URL to point to a homepage, Github repo, or anything else related to the app.
- 4 Icon:** MessageSenderIcon.png
To customize your app's notifications, upload a 72x72 icon in PNG format (transparent background preferred). Any images not 72x72 will be resized.
- 5** ☒ By checking this box, you agree that you have read our [Terms of Service](#) and our [Guide to Being Friendly to our API](#).
- 6**

6. Under **Name**, enter *PhonePad 5* or *MessageSender* (1).
7. Select **Application** as the **Type** (2).
8. You can enter a **Description** and/or **URL** if you want but this is optional (3).
9. If you would like the PhonePad 5 icon displayed in your iOS and/or Android app, click the **Browse** button and navigate to the **Icon** folder (it's under *C:\PhonePad5Server\PushoverIcon*) (4).
10. Check the **Terms of Service** check box (5).
11. Click the **Create Application** button (6).
12. An Application Key (API Token/Key) will be created and displayed.



13. Copy and paste the key into the *Application Key* field on the *Pushover* screen in *Communication Settings*.

14. That's it!

You will also need to download the Pushover app to your iOS or Android devices. They come with a free 7-day trial and they cost around \$5 (USD) to buy. The great news is you only have to buy them once for each platform. After that they are free for any other devices on the same platform.

Download the Pushover iOS app

Download the Pushover Android app



Please note that these screens and instructions may have changed since the publication of this user guide.

Using Gmail with PhonePad 5

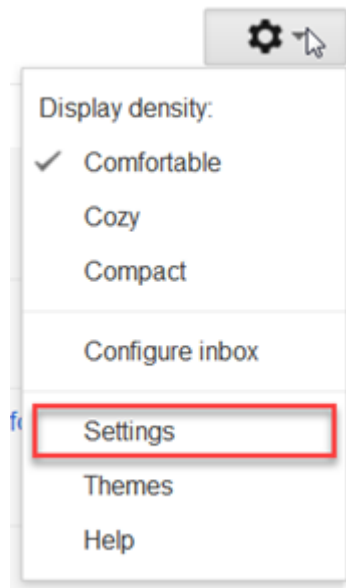
Setting up a Gmail account to use with PhonePad 5 (and MessageSender 6) is a little tricky due to Google's security requirements.

By default, Gmail will usually prevent PhonePad from sending emails. You will need to configure Gmail to allow PhonePad to connect.

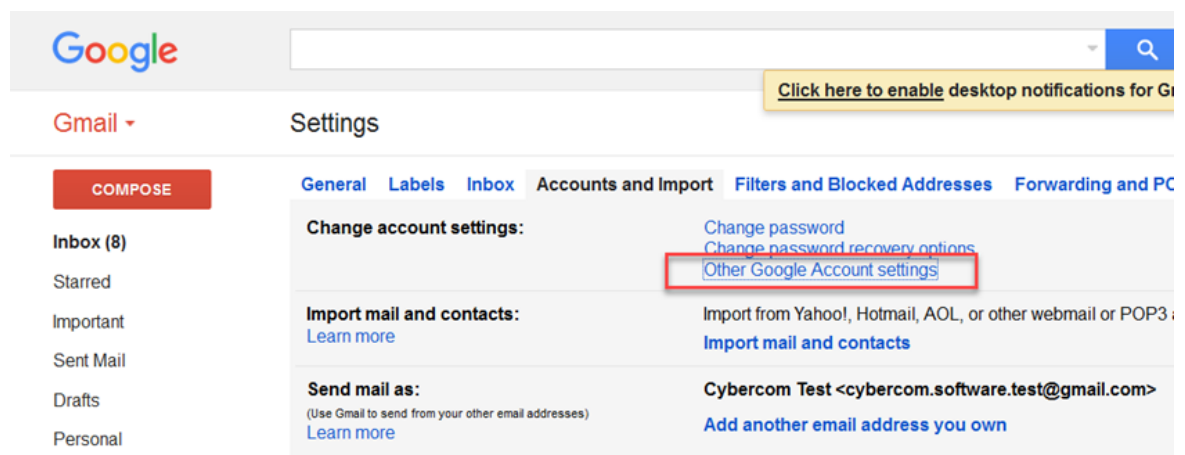
If You Have Google's Two-Step Verification Enabled

Follow these steps if your GMail account is using two-step verification.

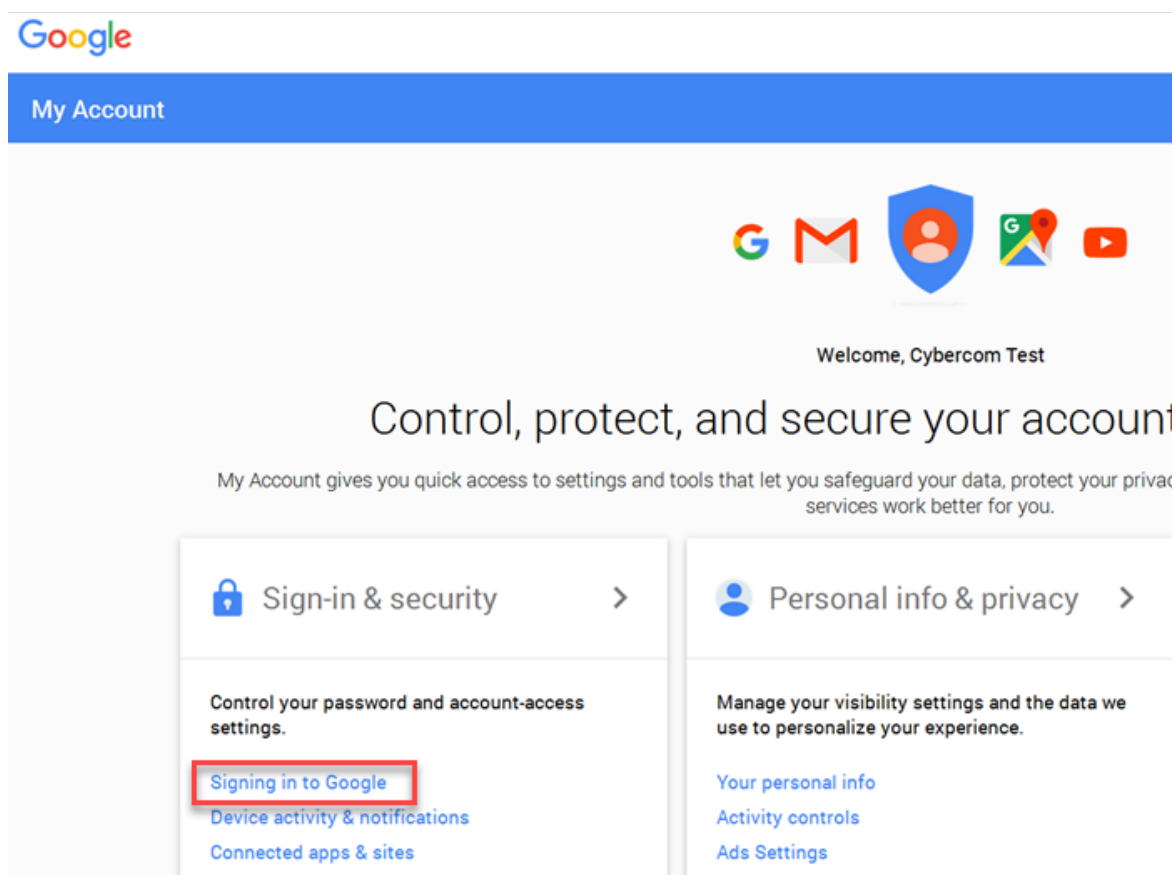
1. Login to your GMail account.
2. Click on the *Gear* icon and select **Settings** from the menu.



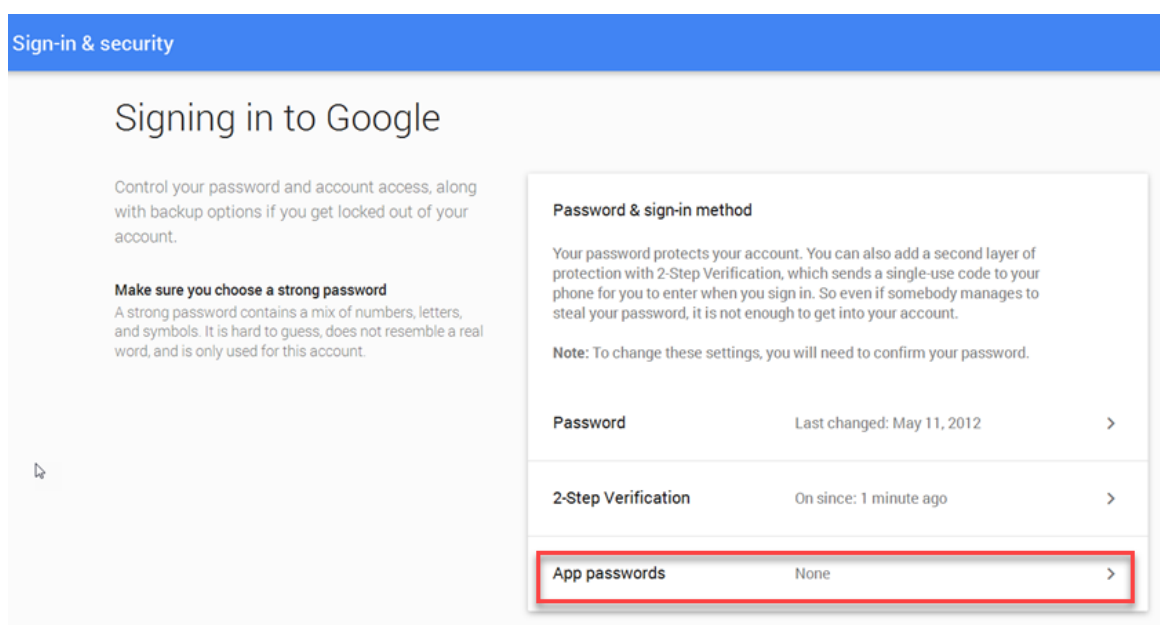
3. Click **Accounts and Import**.
4. Click **Other Google Account Settings**.



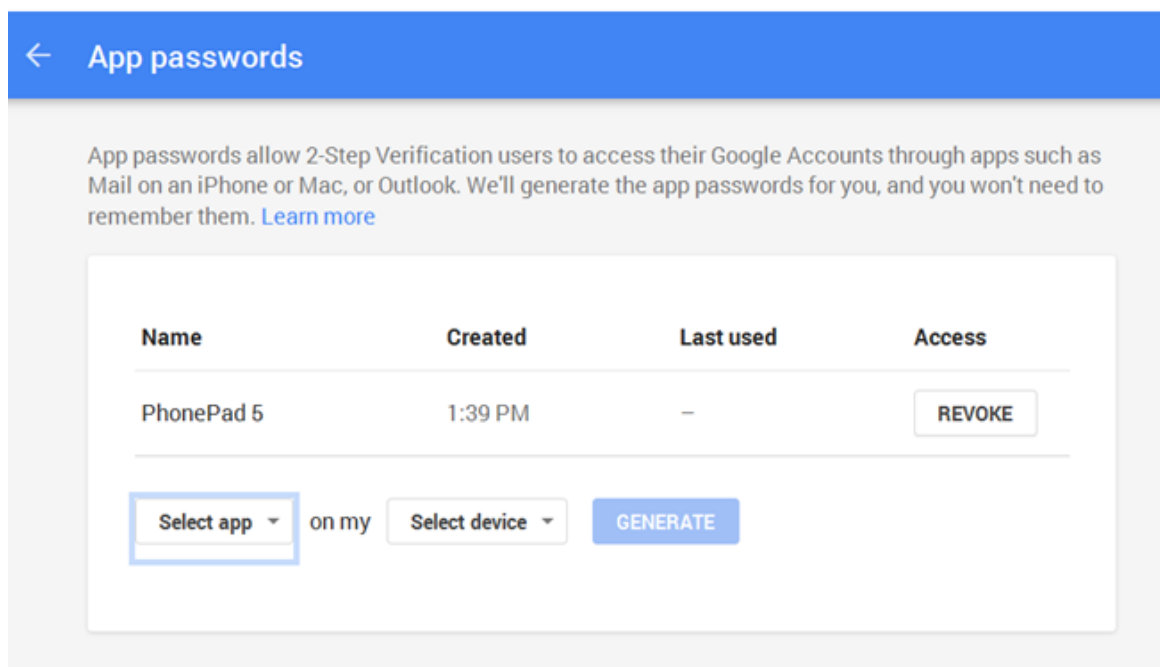
5. Click **Signing in to Google**.



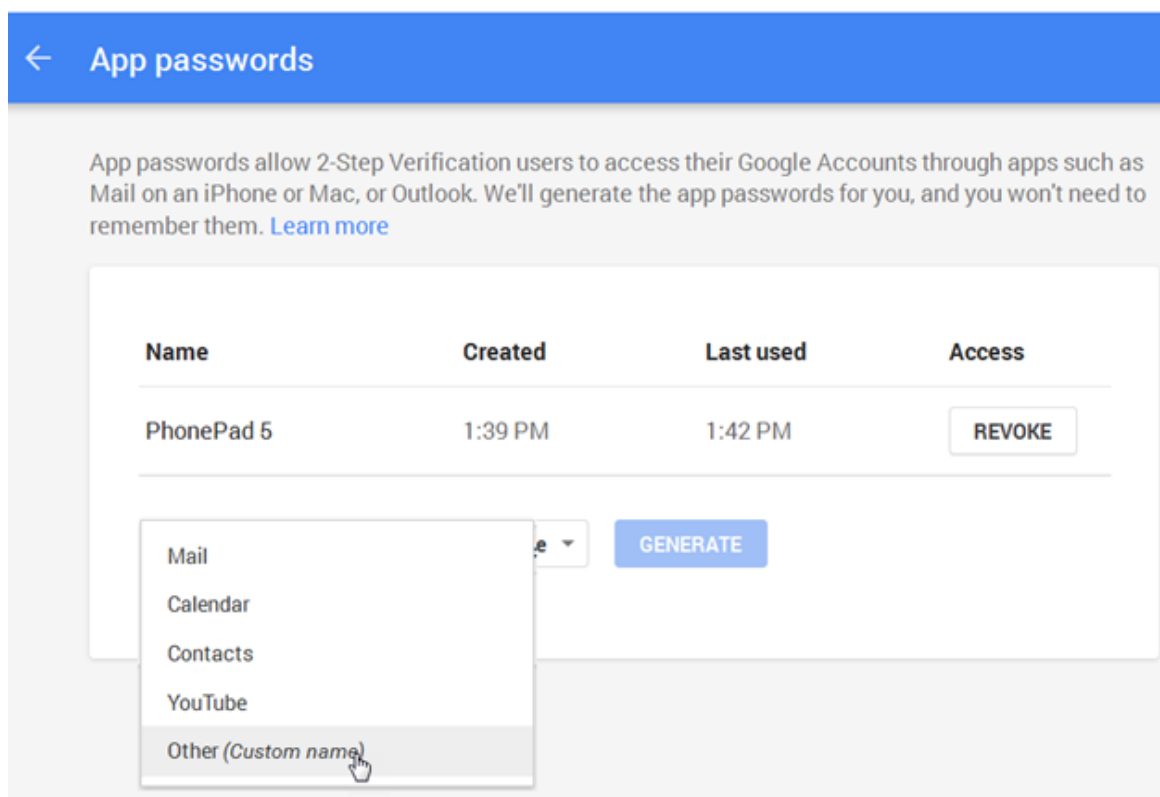
6. Select **App Passwords**.



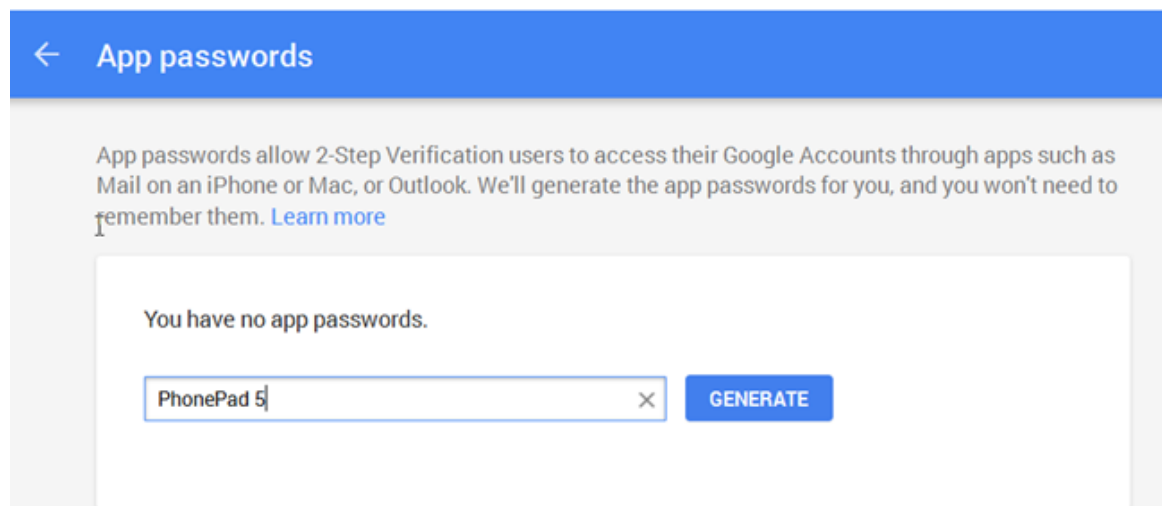
7. Click the **Select app** drop-down menu.



8. Select **Other** from the drop-down menu.

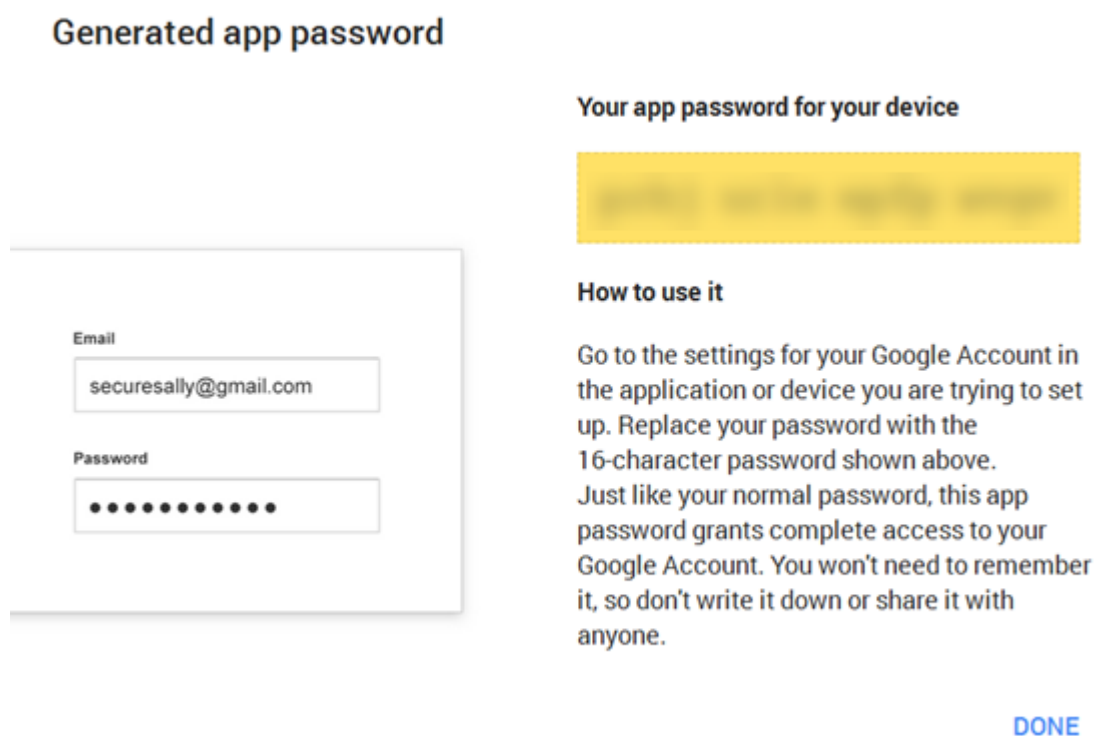


9. Enter an application name, eg.: PhonePad 5. Click **Generate**.



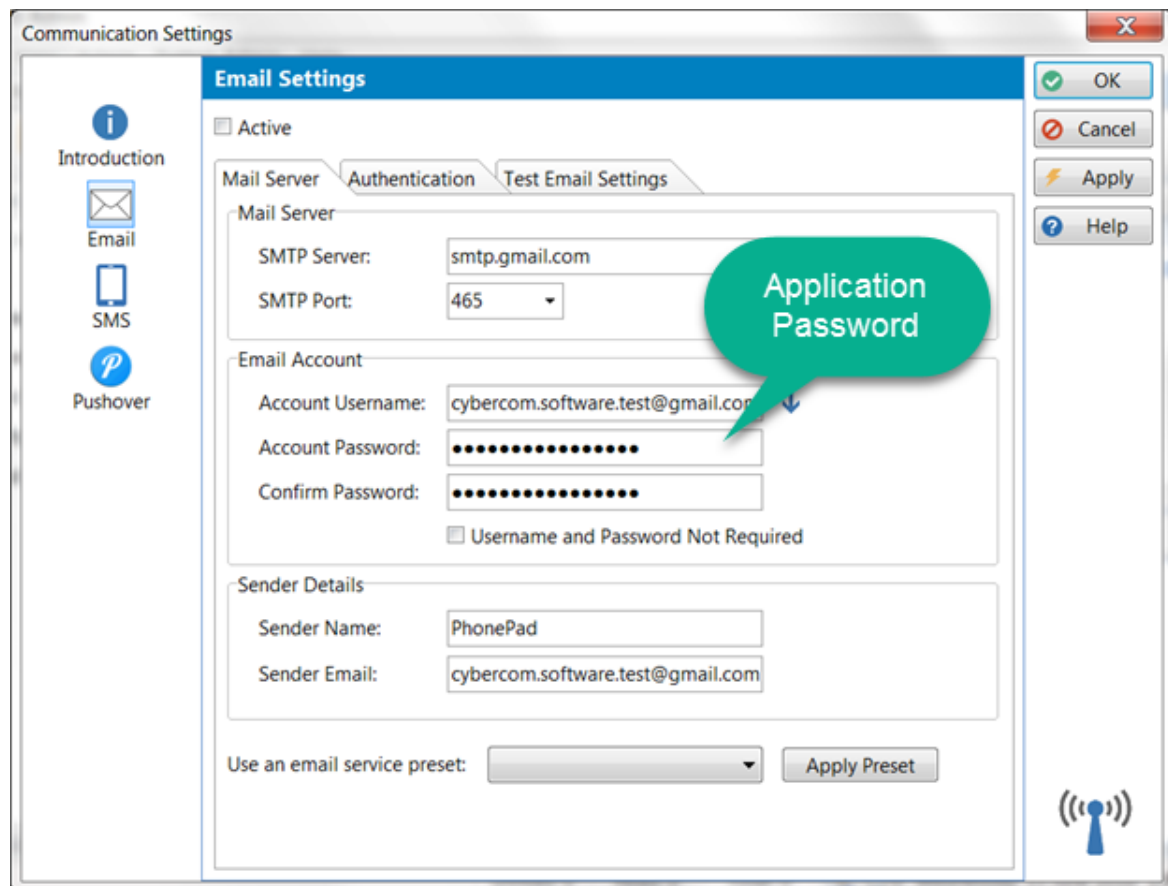
The screenshot shows the 'App passwords' page. At the top is a blue header with a back arrow and the text 'App passwords'. Below the header, there is a paragraph explaining that app passwords allow 2-Step Verification users to access their Google Accounts through apps like Mail on an iPhone or Mac, or Outlook. It states that Google will generate the app passwords for the user, and they won't need to remember them. A link 'Learn more' is provided. Below this, a message says 'You have no app passwords.' There is a text input field containing 'PhonePad 5' and a blue 'GENERATE' button to its right.

10. An application password will be created for you to use.



The screenshot shows the 'Generated app password' page. On the left, there is a form with two fields: 'Email' containing 'securesally@gmail.com' and 'Password' containing a series of dots. On the right, the heading 'Generated app password' is followed by the subheading 'Your app password for your device'. Below this is a yellow box containing a 16-character password. Underneath the yellow box is the heading 'How to use it', followed by a paragraph explaining that the user should go to the settings for their Google Account in the application or device they are trying to set up, replace their password with the 16-character password shown above, and that this app password grants complete access to their Google Account. It also states that the user won't need to remember it, so they shouldn't write it down or share it with anyone. At the bottom right of the page is a blue 'DONE' button.

11. Select the password and copy it, or write it down.
12. Use the password in PhonePad 5, in place of the usual password for this GMail account.

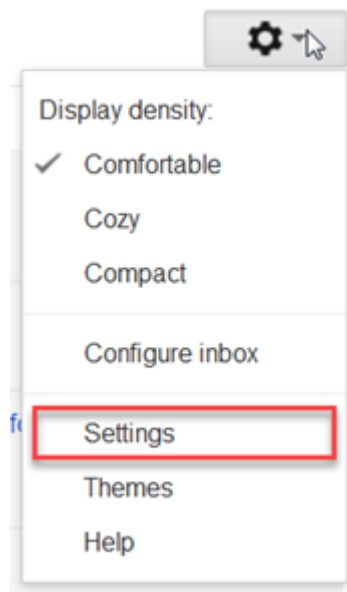


13. You should now be able to send emails from PhonePad 5 and MessageSender 6.

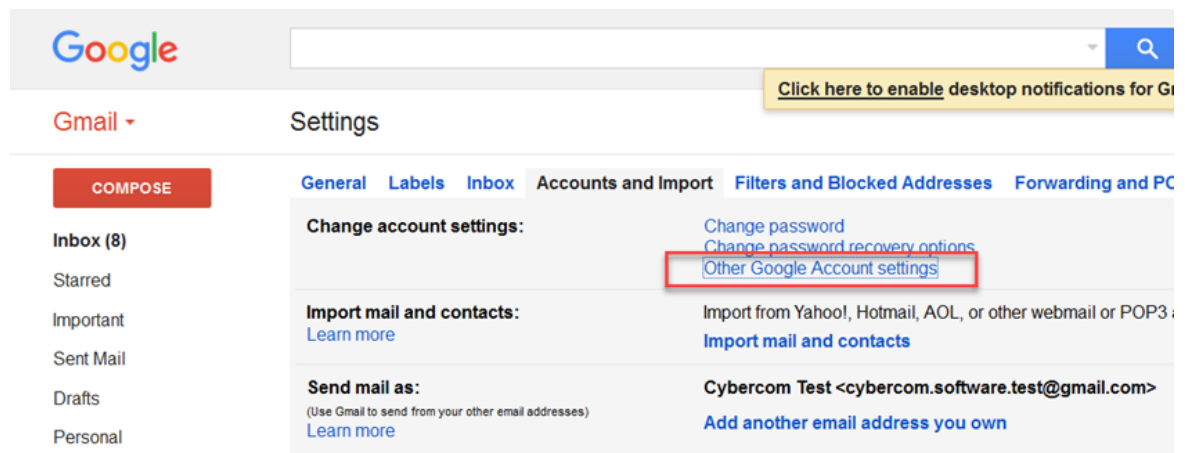
If You Don't Have Two-Step Verification Enabled

Follow these steps if your GMail account is **not** using two-step verification.

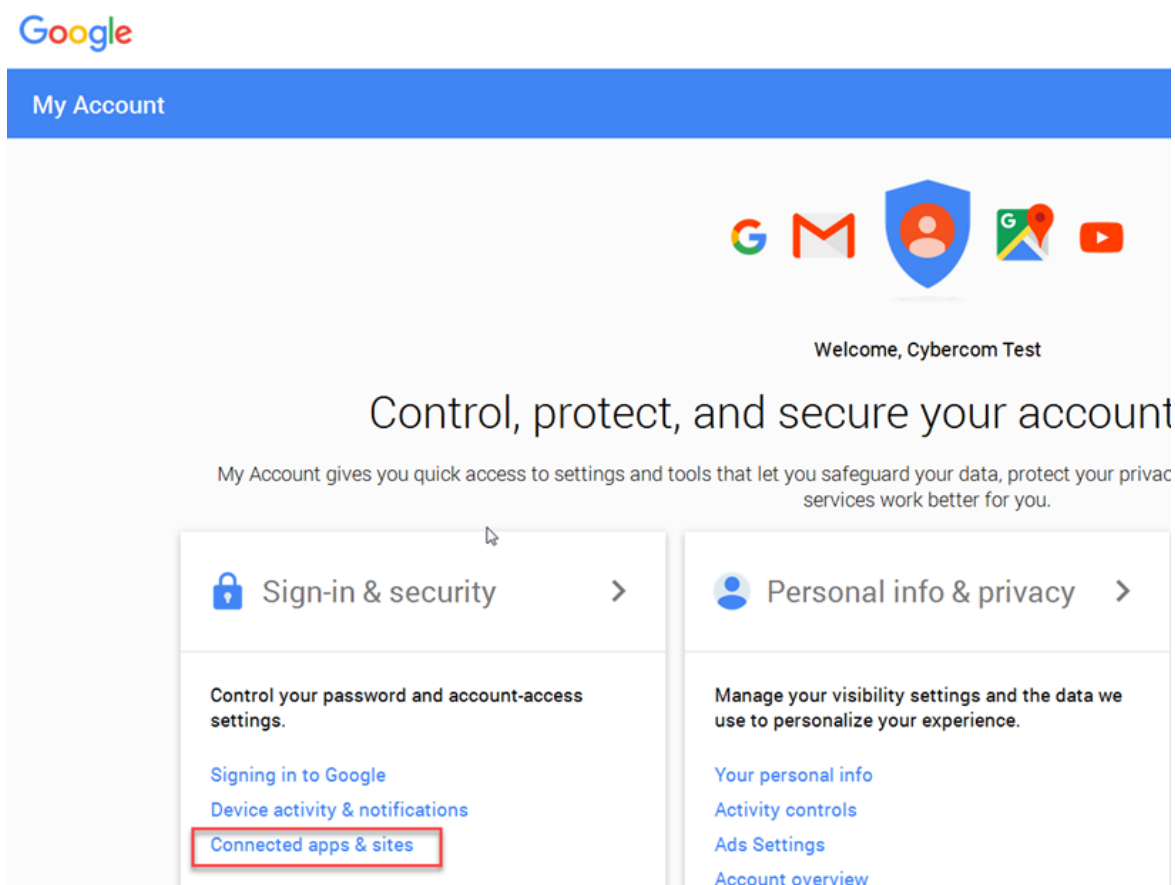
1. Login to your GMail account.
2. Click on the *Gear* icon and select **Settings** from the menu.



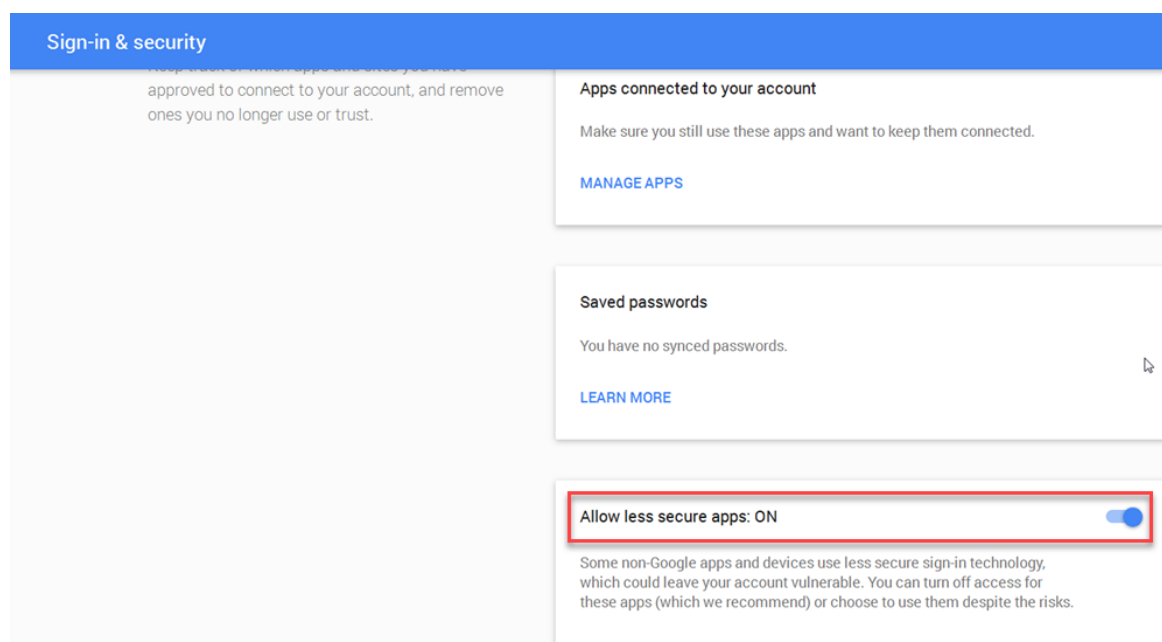
3. Click **Accounts and Import**.
4. Click **Other Google Account Settings**.

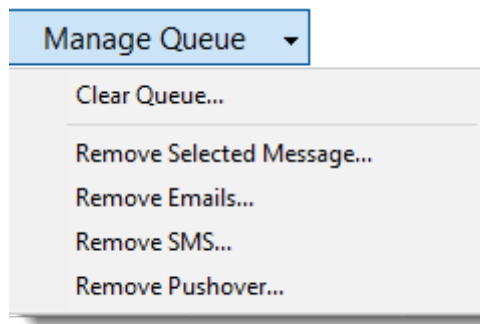


5. Click **Connected apps & sites**.



6. Set **Allow less secure apps** to **ON**.



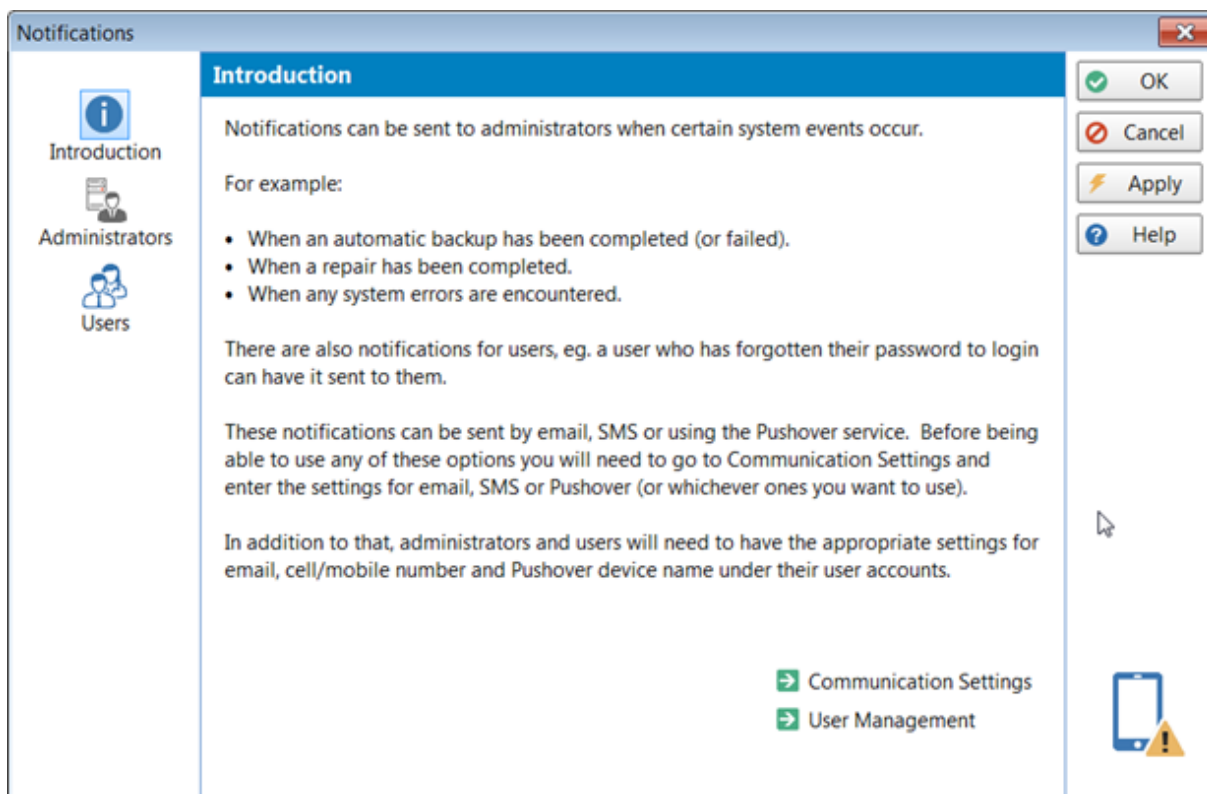


Clear Queue	Clears all messages from the queue. Any messages cleared will not be sent.
Remove Selected Message	Deletes the selected message.
Remove Emails	Clears all email messages from the queue.
Remove SMS	Clears all SMS messages from the queue.
Remove Pushover	Clears all Pushover messages from the queue.
Refresh	Reloads the message queue.

Notifications

PhonePad 5 can keep you up to date with what's happening with your system via the Notifications feature.

To access Notifications, select the **System Admin** tab and click on the **Notifications** button, or select **Notifications** from the **System Admin** menu.



Administrator Notifications

Administrators can set up various notification options. To access these settings, select **Administrators** from the side menu.

Notifications

Administrator Notifications

AutoBackup Completion

☐ Email ☐ SMS ☐ Pushover ☐ Cloud ☒ None

Repair Completion

☐ Email ☐ SMS ☐ Pushover ☐ Cloud ☒ None

System Errors

☐ Email ☐ SMS ☐ Pushover ☐ Cloud ☒ None

Server Update

☐ Email ☐ SMS ☐ Pushover ☐ Cloud ☒ None

Administrator Notification List

☐ Admin
☐ Andrew

OK Cancel Apply Help

AutoBackup Completion

Email	When selected, Automatic Backup notifications are sent to a list of administrators by email using the email account you set up under Communication Settings.
SMS	When selected, Automatic Backup notifications are sent to a list of administrators by SMS.
Pushover	When selected, Automatic Backup notifications are sent to a list of administrators by Pushover.
Cloud	When selected, Automatic Backup notifications are sent to a list of administrators by email using our servers.
None	No notification will be sent.


Repair Completion

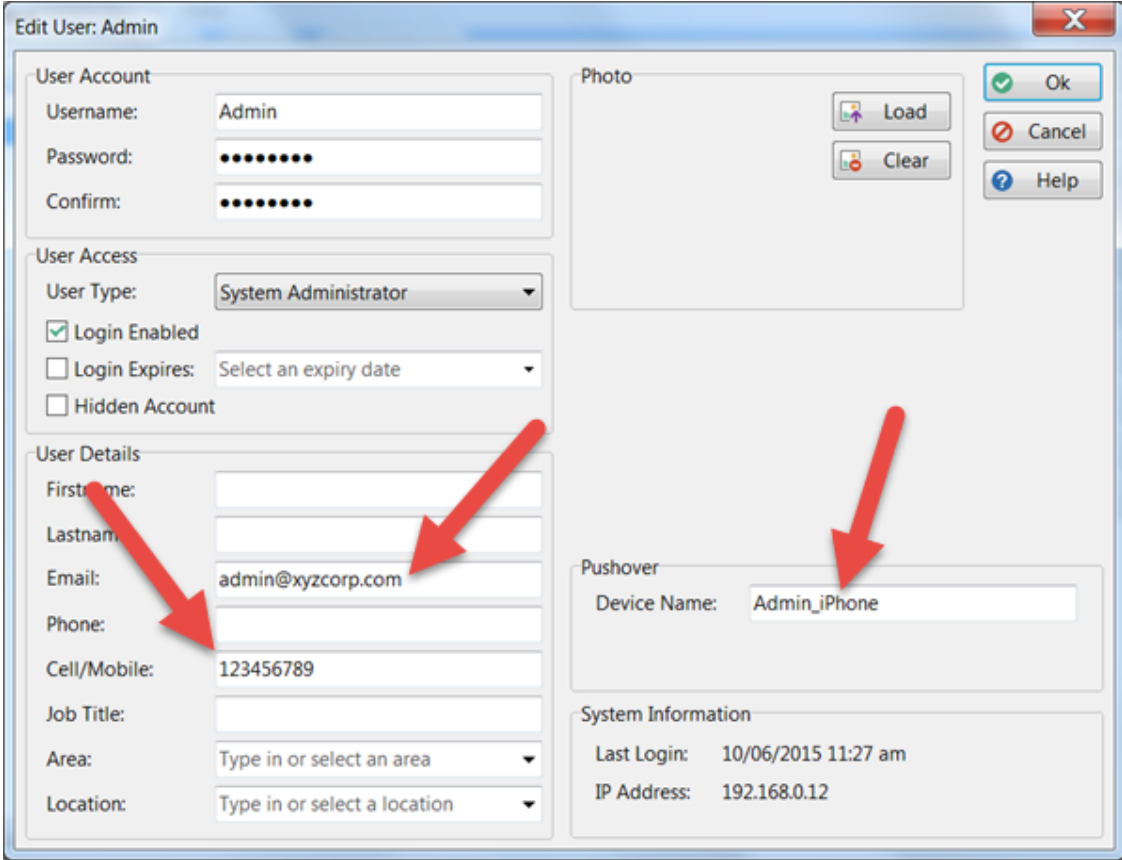
Email	When selected, Repair Completion notifications are sent to a list of administrators by email using the email account you set up under Communication Settings.
--------------	---

SMS	When selected, Repair Completion notifications are sent to a list of administrators by SMS.
Pushover	When selected, Repair Completion notifications are sent to a list of administrators by Pushover.
Cloud	When selected, Repair Completion notifications are sent to a list of administrators by email using our servers.
None	No notification will be sent.
System Errors	
Email	When selected, System Error notifications are sent to a list of administrators by email using the email account you set up under Communication Settings.
SMS	When selected, System Error notifications are sent to a list of administrators by SMS.
Pushover	When selected, System Error notifications are sent to a list of administrators by Pushover.
Cloud	When selected, System Error notifications are sent to a list of administrators by email using our servers.
None	No notification will be sent.
Server Update	
Email	When selected, whenever the Server version is updated a notification is sent to a list of administrators by email using the email account you set up under Communication Settings.
SMS	When selected, whenever the Server version is updated a notification is sent to a list of administrators by SMS.
Pushover	When selected, whenever the Server version is updated a notification is sent to a list of administrators by Pushover.
Cloud	When selected, whenever the Server version is updated a notification is sent to a list of administrators by email using our servers.
None	No notification will be sent.

Administrator Notification List

All PhonePad 5 administrators will appear in this list. Select the check box next to each administrator that should receive the above notifications.

 Administrators must have the appropriate fields set under their user accounts to receive notifications, ie. their **Email**, **Cell/Mobile** Number and/or **Pushover Device Name**.



Edit User: Admin

User Account

Username: Admin

Password:

Confirm:

User Access

User Type: System Administrator

☒ Login Enabled

☐ Login Expires: Select an expiry date

☐ Hidden Account

User Details

First Name:

Last Name:

Email: admin@xyzcorp.com

Phone:

Cell/Mobile: 123456789

Job Title:

Area: Type in or select an area

Location: Type in or select a location

Photo

Load

Clear

Pushover

Device Name: Admin_iPhone

System Information

Last Login: 10/06/2015 11:27 am

IP Address: 192.168.0.12

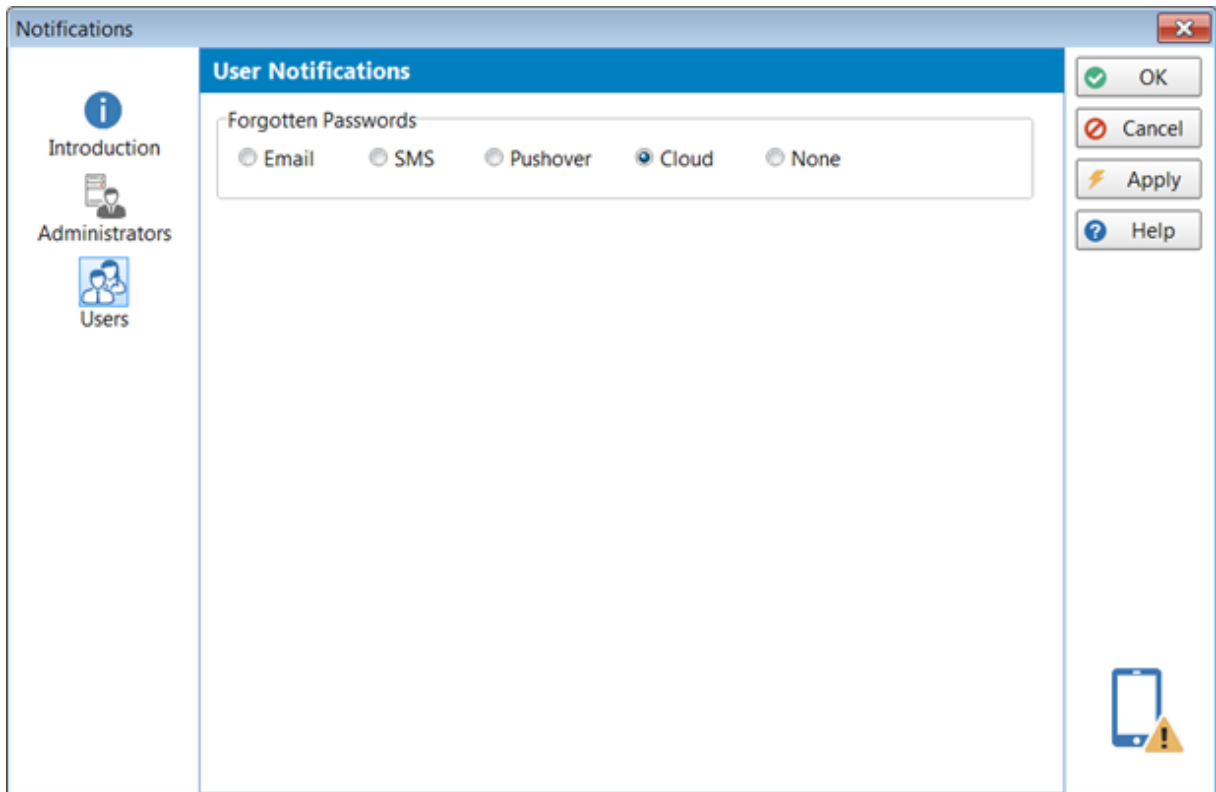
Ok

Cancel

Help

Users

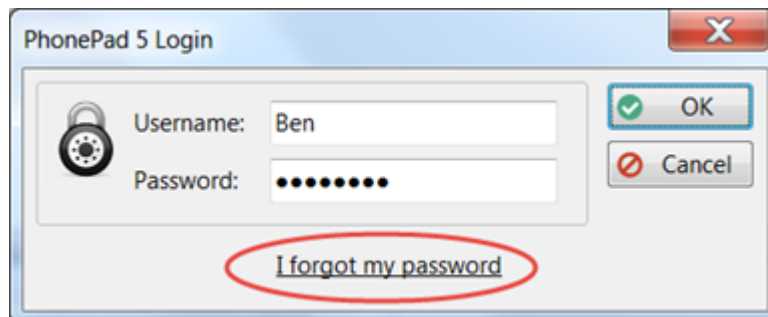
Administrators can set up options for all users on this screen. To access these settings, select **Users** from the side menu.



Forgotten Passwords

This is a very useful feature to enable for users. If a user tries to login to PhonePad but realizes they have forgotten their password, clicking on the **I Forgot My Password** link will enable them to receive their password by email, SMS or Pushover.

This can save administrators time by not having to reset a user's password for them. It's of course also useful for an administrator who has forgotten their password.



Email

When selected, users will receive their PhonePad 5 password by Email when they click the **I Forgot My Password** link.

SMS	When selected, users will receive their PhonePad 5 password by SMS when they click the I Forgot My Password link.
Pushover	When selected, users will receive their PhonePad 5 password by Pushover when they click the I Forgot My Password link.
Cloud	When selected, users will receive their PhonePad 5 password by Email using our servers when they click the I Forgot My Password link.
None	No notification will be sent.



Users must have the appropriate fields set under their user accounts to receive notifications, ie. their **Email**, **Cell/Mobile** Number and/or **Pushover Device Name**.

Edit User: Admin

User Account

Username: Admin

Password: ••••••••

Confirm: ••••••••

User Access

User Type: System Administrator

☒ Login Enabled

☐ Login Expires: Select an expiry date

☐ Hidden Account

User Details

First Name:

Last Name:

Email: admin@xyzcorp.com

Phone:

Cell/Mobile: 123456789

Job Title:

Area: Type in or select an area

Location: Type in or select a location

Photo

Load

Clear

Ok

Cancel

Help

Pushover

Device Name: Admin_iPhone

System Information

Last Login: 10/06/2015 11:27 am

IP Address: 192.168.0.12

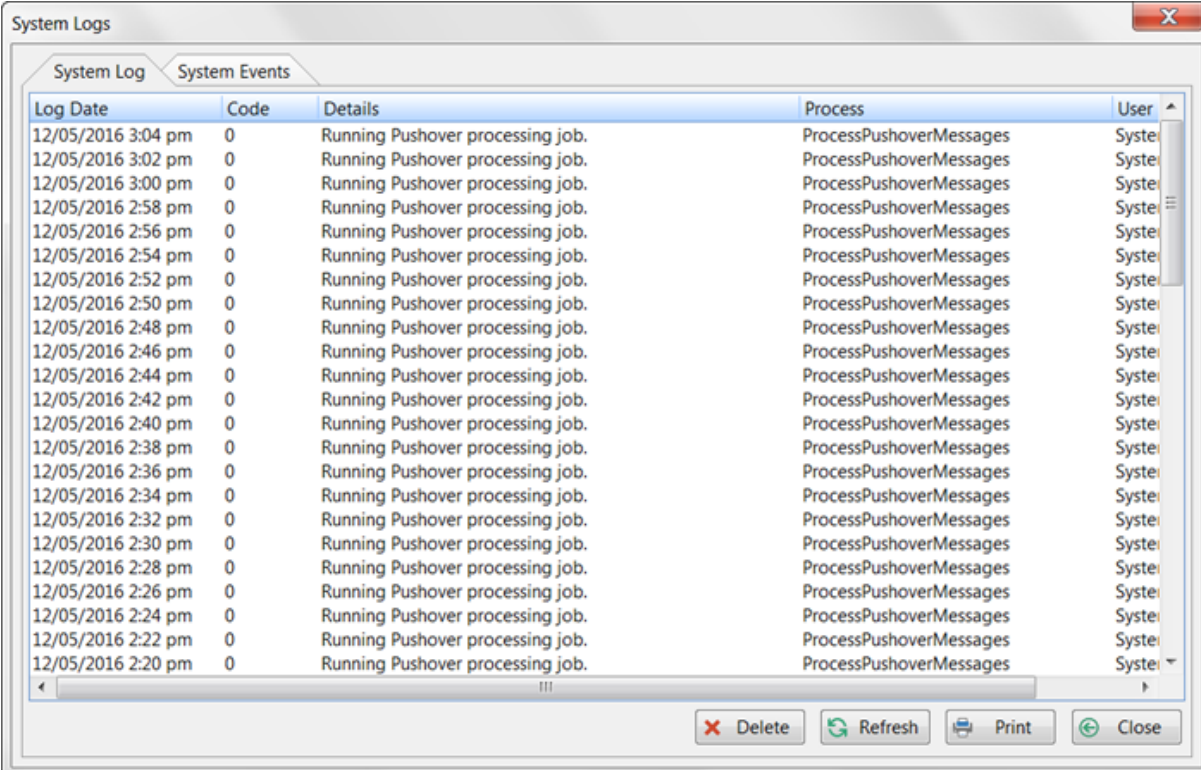
Server Logs

PhonePad 5 keeps a log of various background tasks that run on the PhonePad 5 Server. Normally you would not need to look at these logs but they can be useful when troubleshooting server problems.

To access the Server Logs, select the **System Admin** tab and click on the **Server Logs** button, or select **Server Logs** from the **System Admin** menu.

System Log

Shows a list of background system tasks that have been run on the PhonePad 5 Server.



The screenshot shows a window titled "System Logs" with two tabs: "System Log" (selected) and "System Events". The "System Log" tab displays a table of log entries. The table has five columns: "Log Date", "Code", "Details", "Process", and "User". The "Log Date" column shows dates from 12/05/2016 2:20 pm to 3:04 pm. The "Code" column shows the value "0". The "Details" column shows "Running Pushover processing job." for all entries. The "Process" column shows "ProcessPushoverMessages" for all entries. The "User" column shows "System" for all entries. At the bottom of the window, there are four buttons: "Delete", "Refresh", "Print", and "Close".

Log Date	Code	Details	Process	User
12/05/2016 3:04 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 3:02 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 3:00 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:58 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:56 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:54 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:52 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:50 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:48 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:46 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:44 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:42 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:40 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:38 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:36 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:34 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:32 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:30 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:28 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:26 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:24 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:22 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System
12/05/2016 2:20 pm	0	Running Pushover processing job.	ProcessPushoverMessages	System

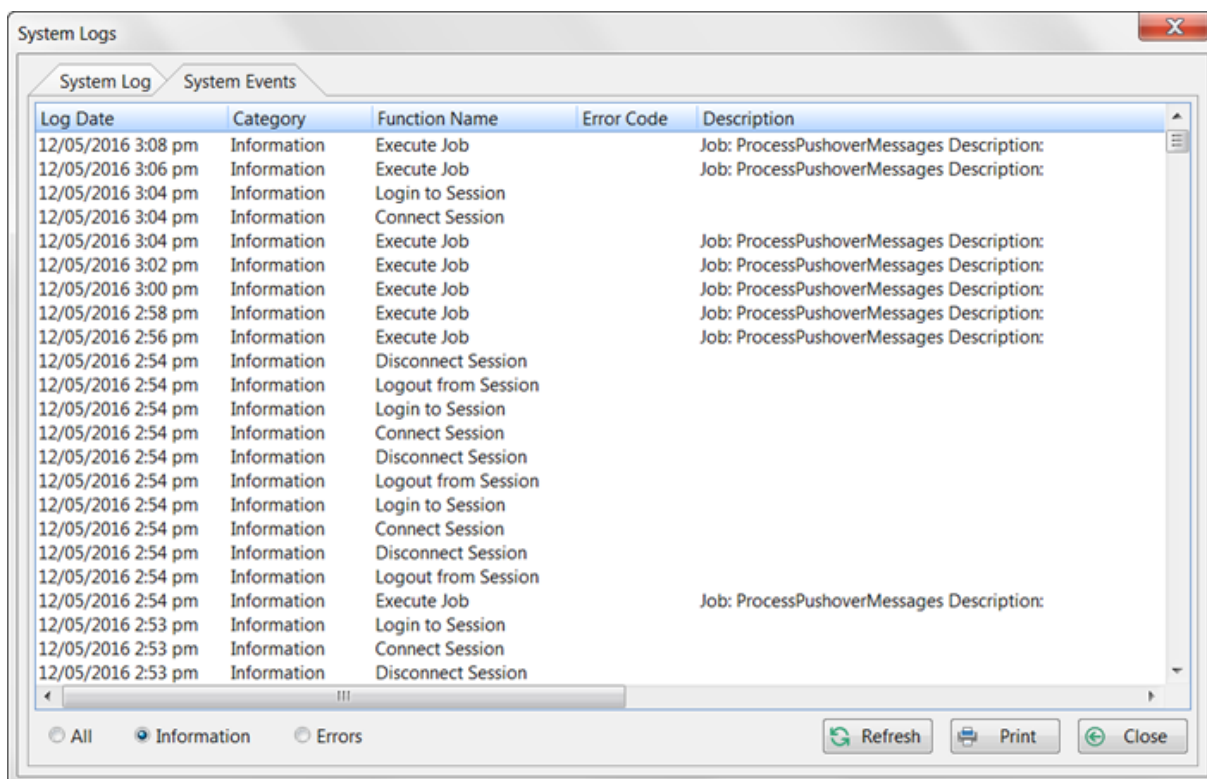
The **Delete** button allows you to delete all log entries. You can do this if the log starts getting too large.

The **Refresh** button will reload the log.

The **Print** button allows you to print of the log entries (and export the report to PDF if needed).

System Events

Shows any system events that have occurred, including errors. You can select **All** events, **Information** events, and **Errors**.



The default view is **Errors**. You normally wouldn't need to worry about **Information** events but this may be needed by Cybercom Software support staff to diagnose a problem.

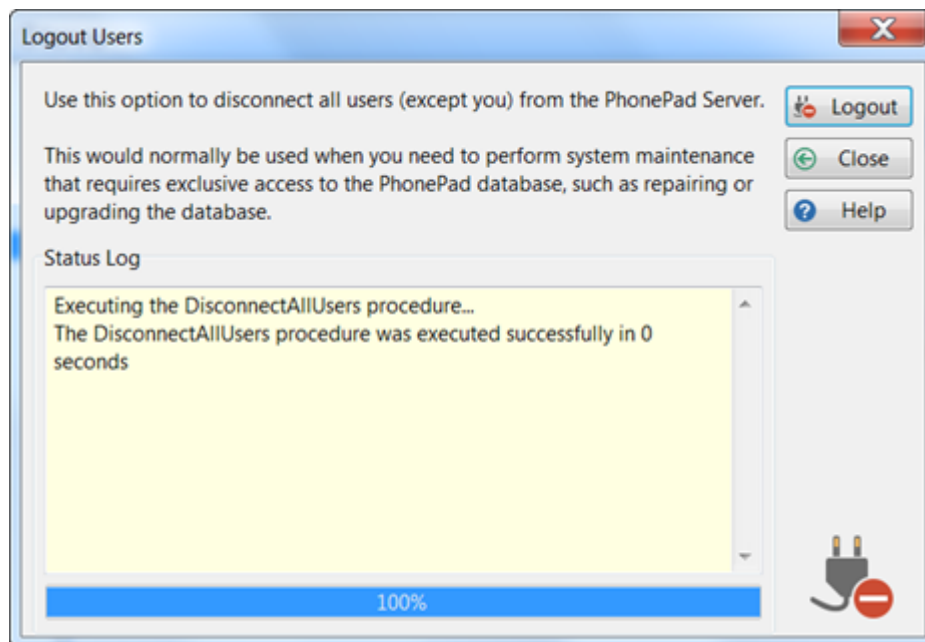
If you see any errors please report them to support@cybercom-software.com as they may be programming errors that we need to know about.

There are also a number of log files generated by the PhonePad system. These logs contain different information. You can find out more about them here: [logs](#).

Logging Out Users

There may be times when you need everyone to log out of PhonePad so you that can repair the database, restore the database from a backup, or install a newer version of PhonePad. If you have asked everyone to log out of PhonePad but there are some users still logged in you can force them to log out.

Select the **System Admin** tab and click on the **Logout Users** button, or select **Logout Users** from the **System Admin** menu.



Click the **Logout** button to force all users to log out. You will be the only user who isn't kicked out of the system.



This is a brute force method. Users won't receive any nice messages asking them to log out. Their connection will be suddenly dropped by the PhonePad 5 Server without any warning. Use with care.

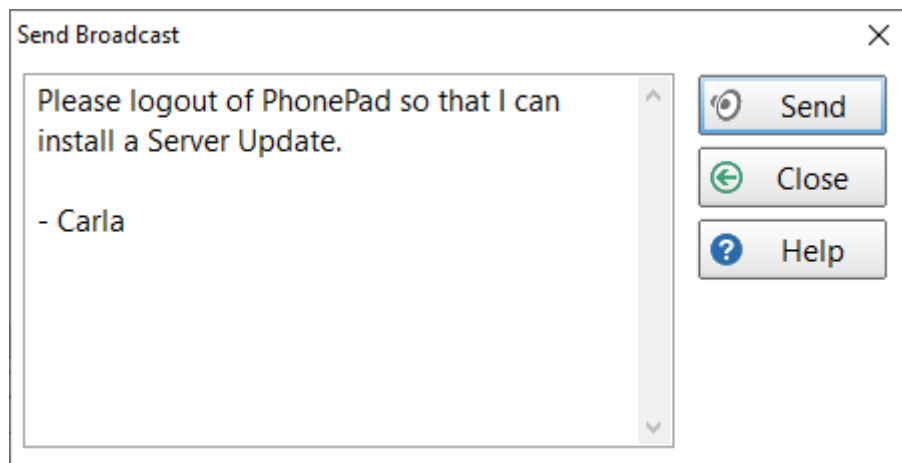
Broadcasting Messages to Users

System Administrators can broadcast a message to all users logged in to PhonePad. Although you can use this feature for sending any sort of message it can be particularly useful to let users know that you are about to do some system maintenance.

To send a broadcast, click the **Broadcast** button on the **System Admin** toolbar.

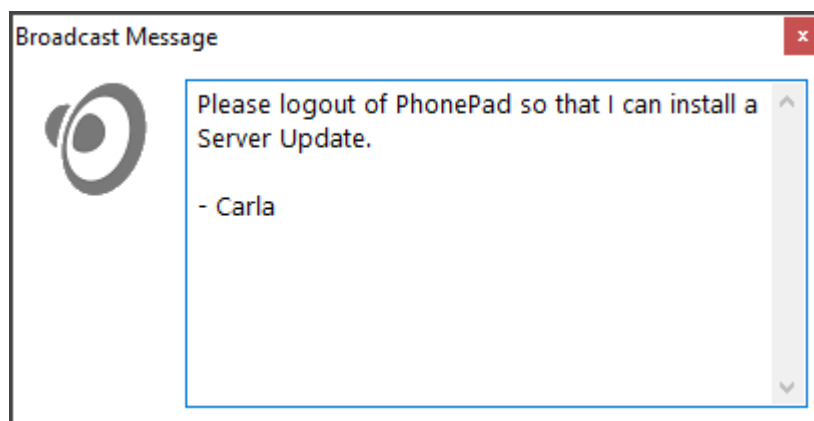


The **Send Broadcast** window will open.



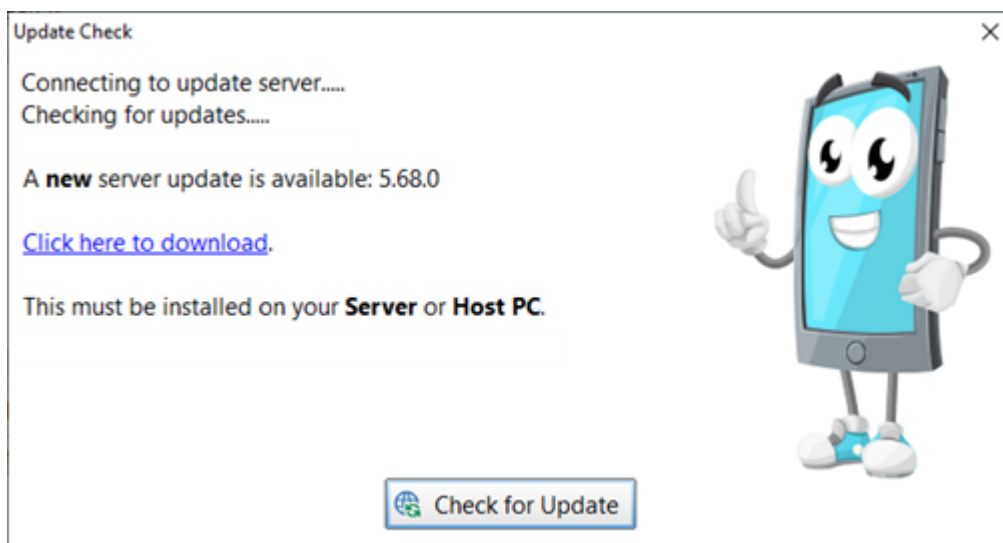
Type in a message of up to 500 characters and then click the **Send** button.

The message should appear on all workstations (as long as the user has PhonePad open) within a few seconds.



Server Updates

You can use this feature to check for newer versions of PhonePad.



Click the **Check for Update** button.

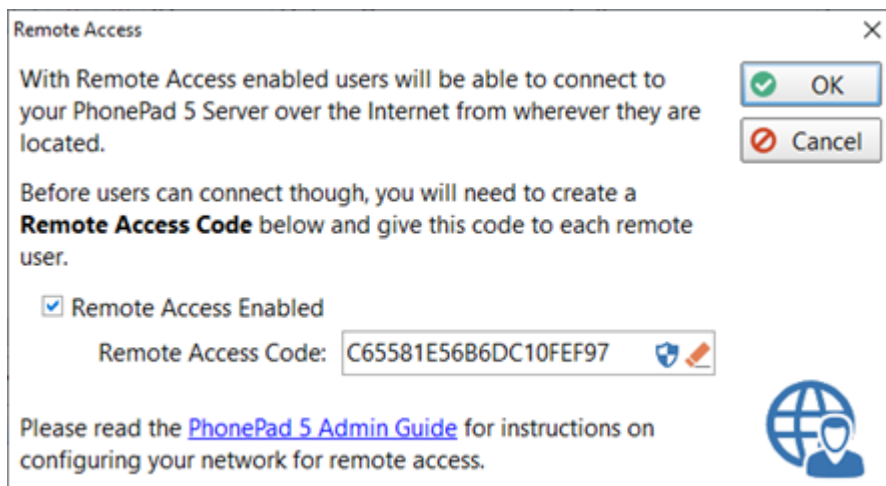
If a newer version is available a download link will be provided.

Please note that Server Updates **can only be installed on your Server or Host PC**. If you download a Server Update to a workstation then you will need to copy it across to a Server or Host PC to install.

Remote Access


You can provide remote users with access to PhonePad over the Internet.

1. Click on the **Remote Access** button on the **System Admin** toolbar, or select **Remote Access** from the **System Admin** menu.
2. Check the **Remote Access Enabled** check box.
3. Click the "shield" button in the **Remote Access Code** field to create a Remote Access Code. The Remote Access Code will be automatically copied to the Windows clipboard
4. Click **OK** to save the settings.



Give the **Remote Access Code** to users that will be logging in remotely.

This is only the first step in providing remote access. There are a few more steps you need to follow.

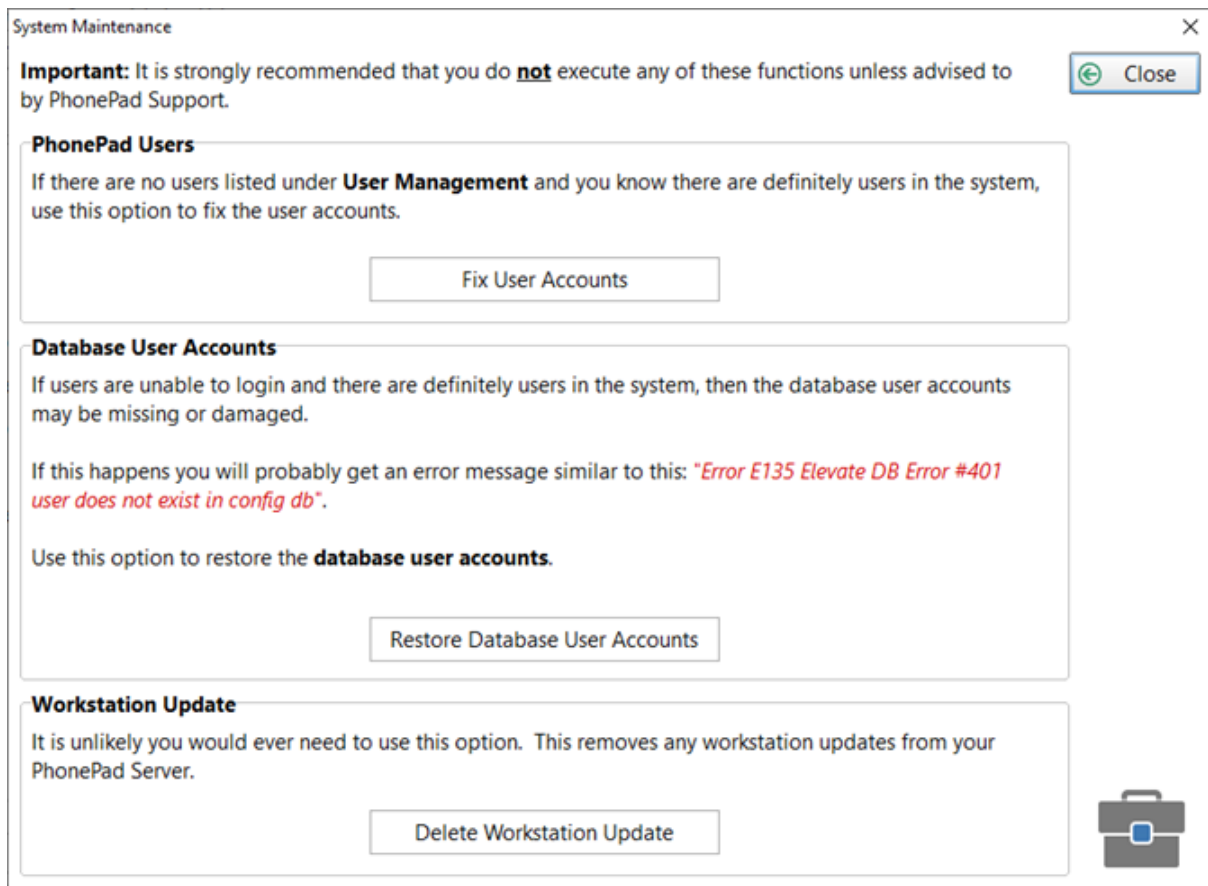
 If you create a new Remote Access Code, any previous Remote Access Code will become invalid. Any users trying to remote connect with the previous Remote Access Code will no longer be able to login until you give them the new code.

System Maintenance

Normally you won't need to access this screen, however, you may be asked by Support staff to use one of the options on this screen to fix an issue.

To access this screen:

1. Select the **System Admin** tab and click on the **System Maintenance** button, or select **System Maintenance** from the **System Admin** menu.
2. Select the option Support has asked you to use.

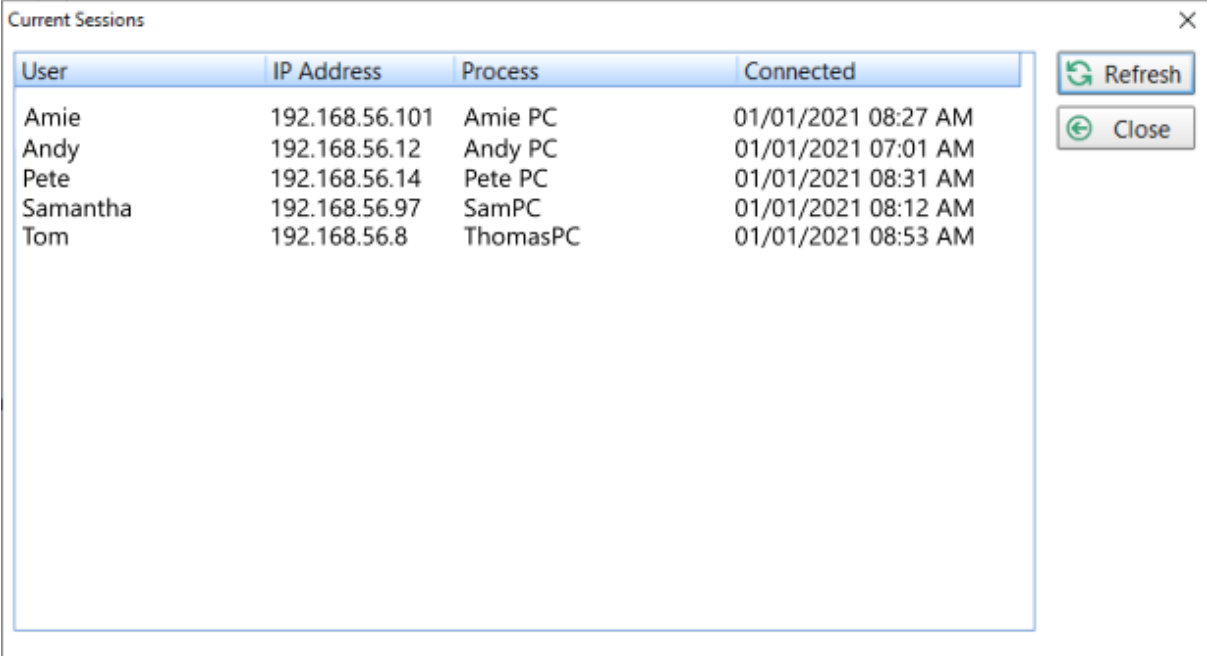


More functions may be added in subsequent releases.

Server Sessions

Displays a list of users currently logged in to PhonePad.

Select the **System Admin** tab and click on the **Server Session** button, or select **Server Sessions** from the **System Admin** menu.



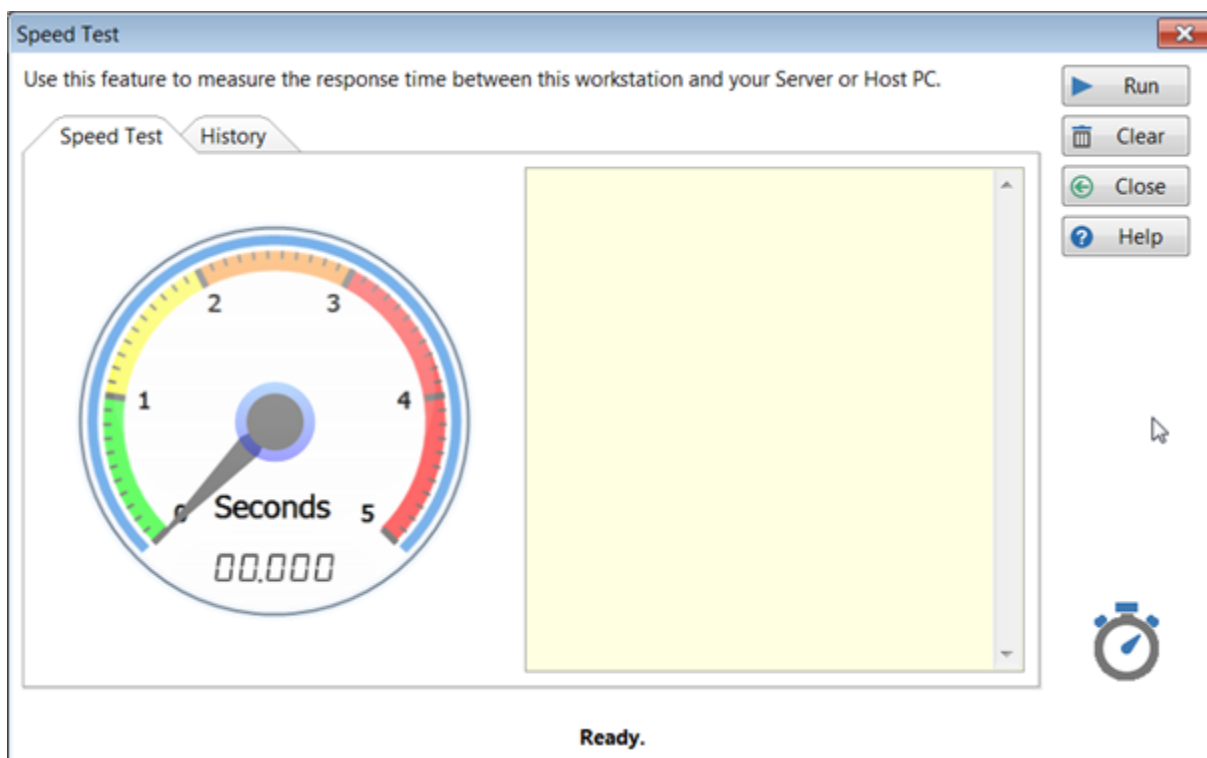
The screenshot shows a window titled "Current Sessions" with a close button (X) in the top right corner. Inside the window is a table with four columns: "User", "IP Address", "Process", and "Connected". The table lists five active sessions. To the right of the table are two buttons: "Refresh" (with a circular arrow icon) and "Close" (with a square icon).

User	IP Address	Process	Connected
Amie	192.168.56.101	Amie PC	01/01/2021 08:27 AM
Andy	192.168.56.12	Andy PC	01/01/2021 07:01 AM
Pete	192.168.56.14	Pete PC	01/01/2021 08:31 AM
Samantha	192.168.56.97	SamPC	01/01/2021 08:12 AM
Tom	192.168.56.8	ThomasPC	01/01/2021 08:53 AM

Speed Test

If you are experiencing performance issues with PhonePad 5, you can run speed tests to see just how slow or fast the response time is between your workstations and your Server or Host PC.

Click the **Speed Test** button on the **System Admin** toolbar, or select **Speed Test** from the **System Admin** menu.

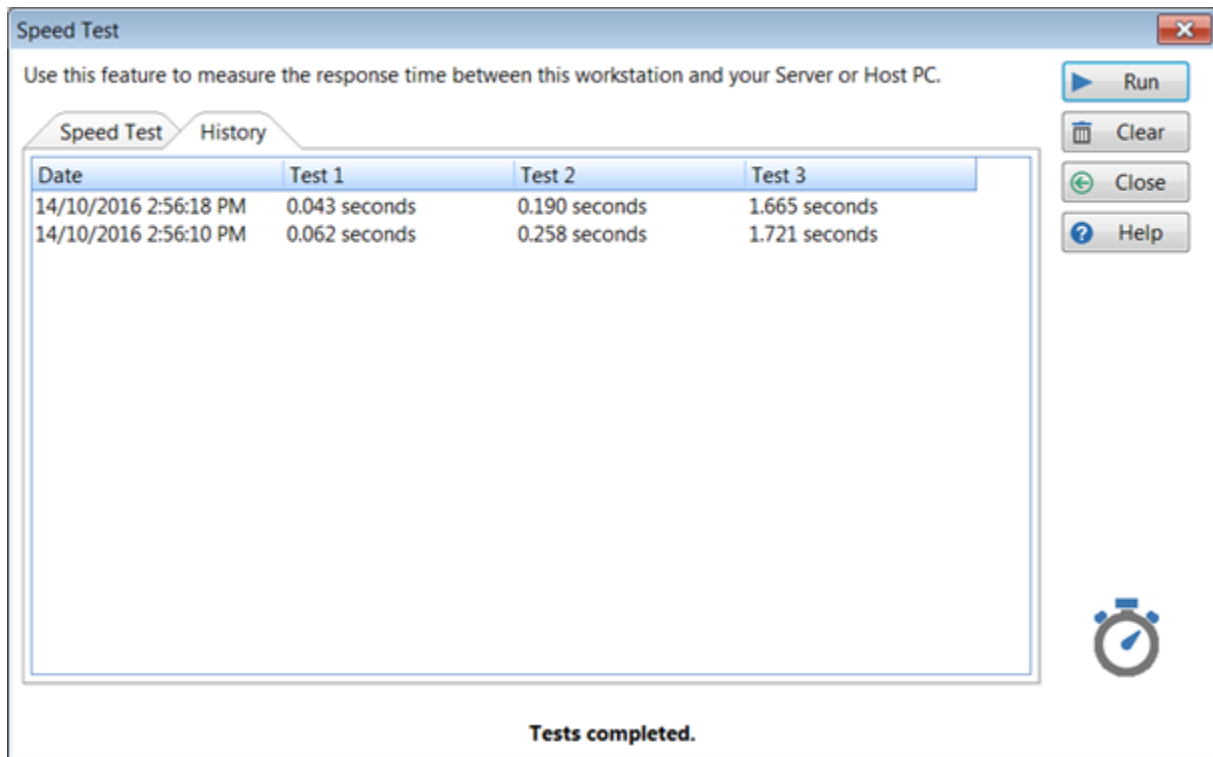


Click the **Run** button to perform a series of tests.

- Test 1** Writes 10 records to the database, then reads and deletes these records.
- Test 2** Writes 100 records to the database, then reads and deletes these records.
- Test 3** Writes 1000 records to the database, then reads and deletes these records.

The "speed dial" will show the response time for Test 1. The time is shown in seconds and microseconds. In the above screenshot the response time is 43 milliseconds (0.043 seconds).

A history of these test results are recorded for future comparison.



You can delete the history at any time by clicking the **Clear** button. You will be asked to confirm this.

Open Log Viewer

Open the Log Viewer.

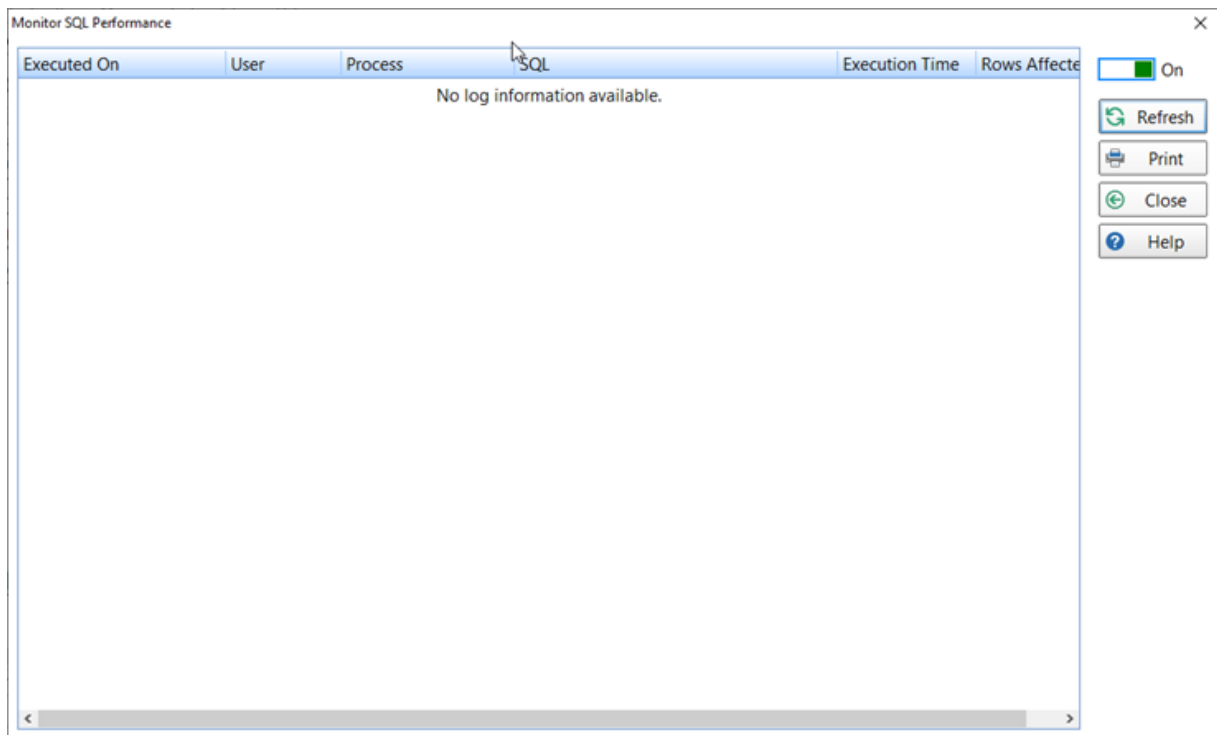
Select the **System Admin** tab and click on the **Log Viewer** button, or select **Log Viewer** from the **System Admin** menu.

SQL Performance Monitoring

If PhonePad is not performing as well as expected, there may be response time issues within the database. You can check to see if some processes are taking too long to execute by enabling monitoring of all internal functions.

Don't worry about understanding this. It's purpose is to identify bottlenecks in performance so that the developers can make changes to optimize these processes.

Select **Monitor SQL Performance** from the **System Admin** menu, or click the **Monitor SQL Performance** button on the **System Admin** toolbar.



Toggle the **On/Off** switch to enable/disable SQL Performance Monitoring.

Click the **Refresh** button to update the display.

The **Print** option allows you to print and/or export the information to PDF.

MessageSender Settings

Although the MessageSender service runs on your Server or Host PC, the MessageSender settings can be managed from any workstation that has PhonePad installed.

Select **MessageSender Settings** from the **System Admin** menu, or click the **MessageSender Settings** button on the **System Admin** toolbar.

MessageSender Settings

There are a few settings you need to set to get things rolling. To do this, you will need to login to PhonePad using a user account that has System Admin access.

1. Select **MessageSender Settings** on the **System Admin** toolbar.
2. Select **Active** to make the MessageSender service active.
3. Select the type of processing you want the service to perform, ie. Process Emails, Process SMS and/or Process Pushover.
4. The final step is to set up your Communication Settings in PhonePad.

MessageSender Settings

Settings | Templates

Active: ☒ ON Process Every minutes

Message Processing

☒ Process Emails

☐ Process SMS

☐ Process Pushover

Activity Log

☒ Only keep the last log files

☒ Log SMS Requests

Email Subject

☐ Use Message Subject

☒ Use Custom Subject:

☐ Use Field for Subject:

Email Replies

☒ Users Can Reply to Messages Forwarded by Email

Email Receipts

☒ Allow Read Receipts

OK Cancel Help

Message Processing	
Active	When set to ON, the MessageSender service will process messages in the message queue.
Process Emails	When checked, the MessageSender service will process messages that are queued to be sent via email.
Process SMS	When checked, the MessageSender service will process messages that are queued to be sent via SMS.
Process Pushover	When checked, the MessageSender service will process messages that are queued to be sent via Pushover.

Process Every x Minutes	Determines how frequently the MessageSender service should check for messages to process. The default is every 5 minutes.
--------------------------------	---

Activity Log	
Detailed Activity Log	When checked, the activity log will display connection information, authentication responses, etc.
Only keep the last x log files	When checked, MessageSender will automatically delete older activity log files. You can specify the number of activity logs to retain.
Log SMS Requests	When checked, provides more detailed information about SMS message sending.

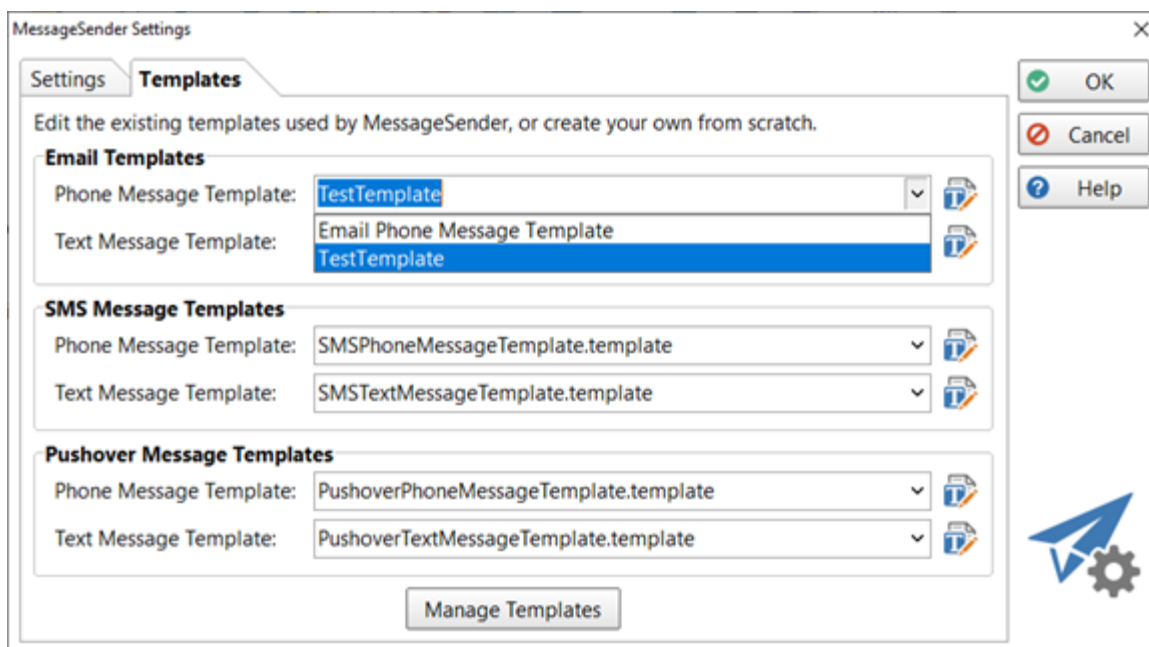
Email Subject	
Use Message Subject	When checked, the activity log will display connection information, authentication responses, etc.
Use Custom Subject	When checked, MessageSender will automatically delete older activity log files. You can specify the number of activity logs to retain.
Use Field for Subject	When checked, provides more detailed information about SMS message sending.

Email Replies	
Users Can Reply to Messages Forwarded by Email	When checked, users receiving the forwarded emails can reply. The replies will be sent back to PhonePad and appear in the sender's Inbox.

Email Receipts	
Allow Read Receipts	When checked, the sender of the forwarded emails will receive Read Receipts when the receivers of the emails read them. Of course, the Read Receipt checkbox must be checked on the PhonePad message when sent.

MessageSender Templates

Under **System Tab/MessageSender Settings** in PhonePad, select the **Templates** tab.



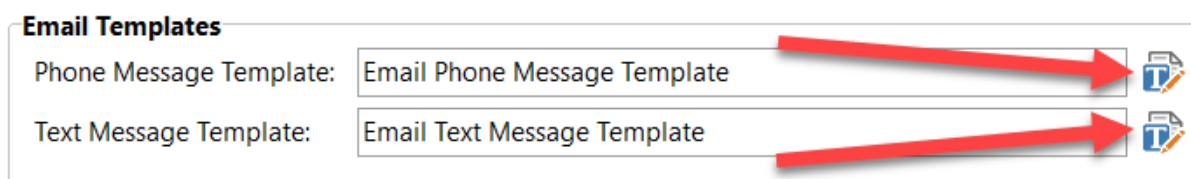
MessageSender comes with default templates for each of the message types. These template determine the type of information included in the forwarded messages as well as the format.

The default message templates should also be selected, but you can select them using the drop-down list if they're not. You can use these as is, modify them, or create your own.

If you need to delete any custom MessageSender templates then click the **Manage Templates** button.

Email Templates (2) (2)

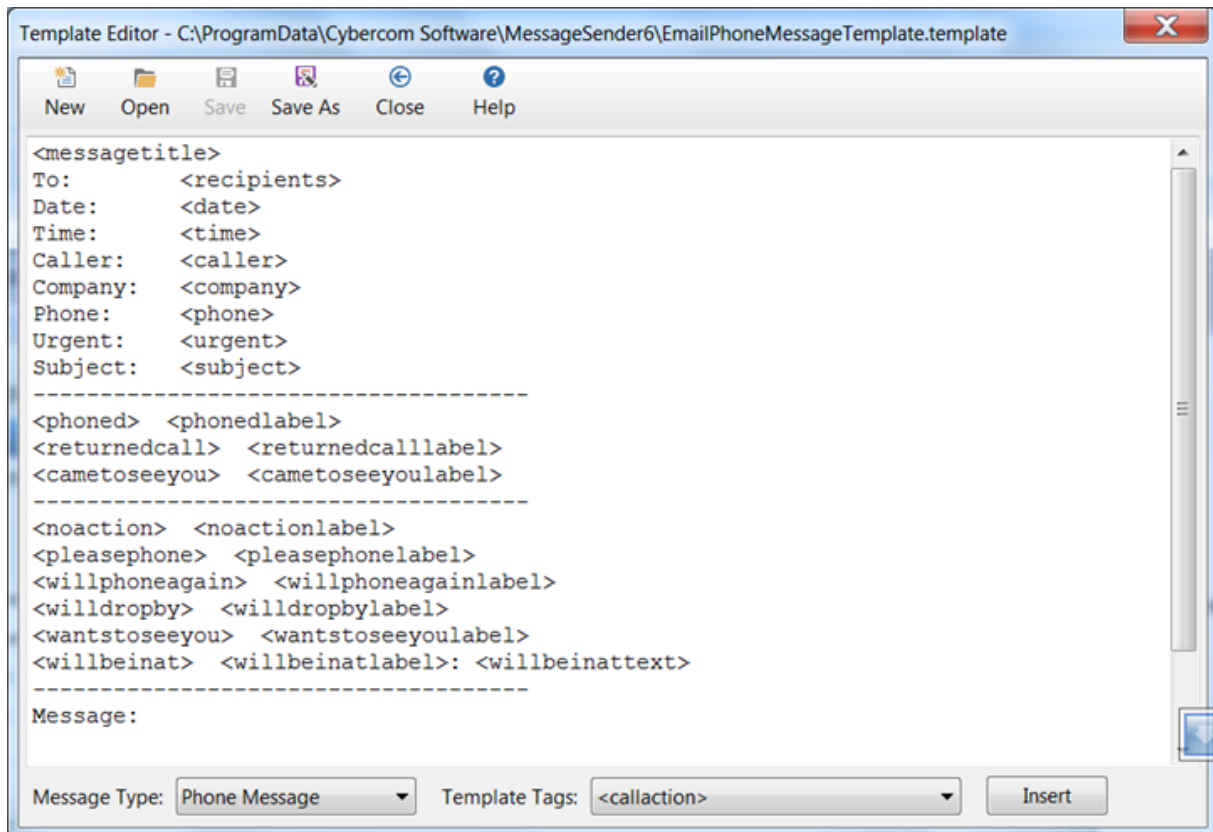
MessageSender Manager includes a built-in editor for creating and editing email message templates. To open the editor, click on the **Template Editor** button.



The Template Editor will be displayed. If a message template was specified in the message template field then the Template Editor will automatically open the template for editing. You have a number of choices:

- Edit the template and save it, overwriting the existing one (use **Save**).

- Edit the template and save it as a new template (use **Save As**).
- Create a new template from scratch by clicking the **New** button.



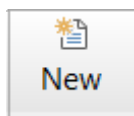
A message template is made up of static text and tags (indicated with <>). For example, in the above screenshot "To:" is static text while "<recipients>" is a tag. When a message is processed, the tags are replaced with actual data from PhonePad messages, while the static text is ignored.

In the same screenshot you can see one of the default email message templates that is included with MessageSender. Virtually every tag is used in this example. To modify the template, simply change or remove the static text and tags you don't want.

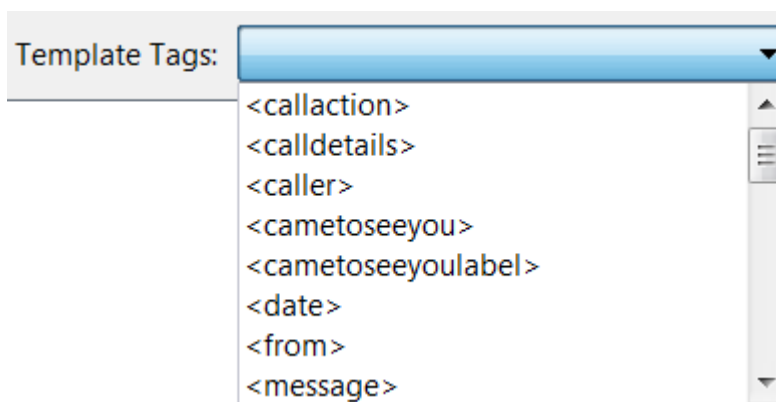
The **Message Type** drop-down list is used to indicate the type of messages the template is to be used for. Tags can be inserted by selecting them from the **Template Tags** drop-down list and then clicking the **Insert** button.

Creating a New Template

1. To create a new message template, click on the **New** button on the toolbar.



2. You can add any static text you want to the message area and format it in any way you desire.
3. To add message tags, position the cursor in the message area where you want the relevant message data to appear. Next, select the appropriate tag from the **Template Tags** drop-down list, and click the **Insert** button.

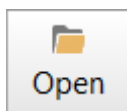


You can save the template by clicking the **Save** button. You will be prompted for a filename.

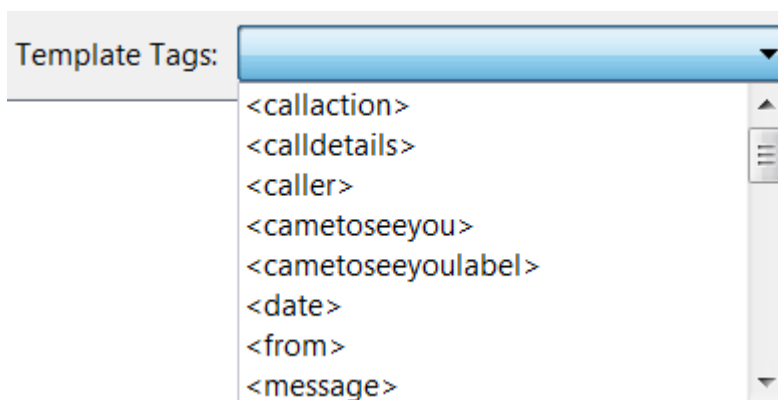


Editing an Existing Template

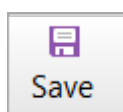
1. If a message template was specified in the message template field then the Template Editor will automatically open the template for editing. You can edit this template or open another template by clicking the **Open** button.



2. Editing a template is the same as creating a new template. You can add any static text you want to the message area and format it in any way you desire.
3. To add message tags, position the cursor in the message area where you want the relevant message data to appear. Next, select the appropriate tag from the **Template Tags** drop-down list, and click the **Insert** button.



4. To save your changes, click the **Save** button.



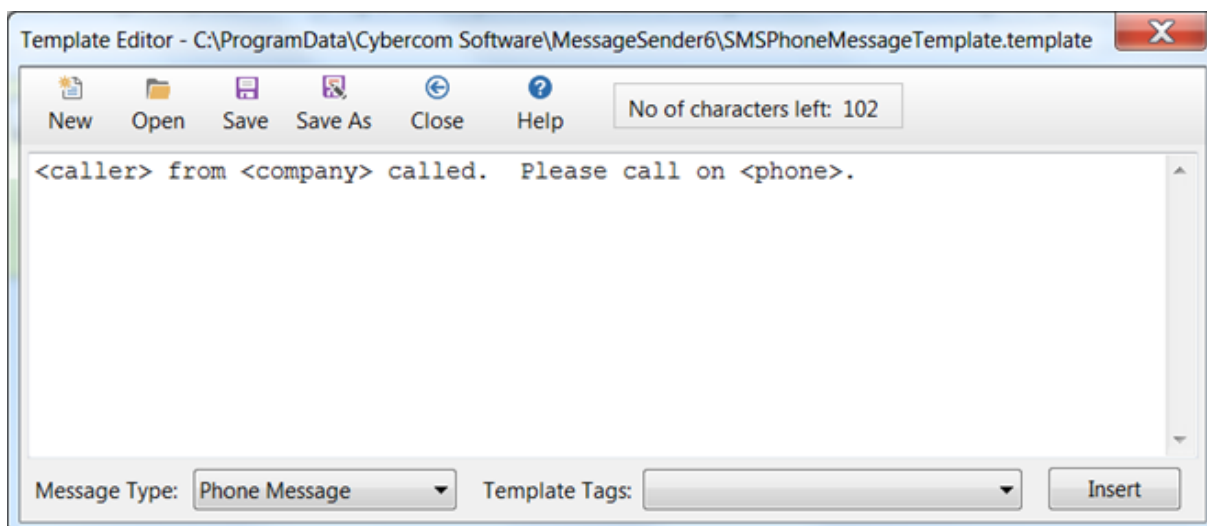
SMS Templates (2) (2)

Email Templates_2MessageSender Manager includes a built-in editor for creating and editing SMS message templates. To open the editor, click on the **Template Editor** button.



The Template Editor will be displayed. If a message template was specified in the message template field then the Template Editor will automatically open the template for editing. You have a number of choices:

- Edit the template and save it, overwriting the existing one (use **Save**).
- Edit the template and save it as a new template (use **Save As**).
- Create a new template from scratch by clicking the **New** button.

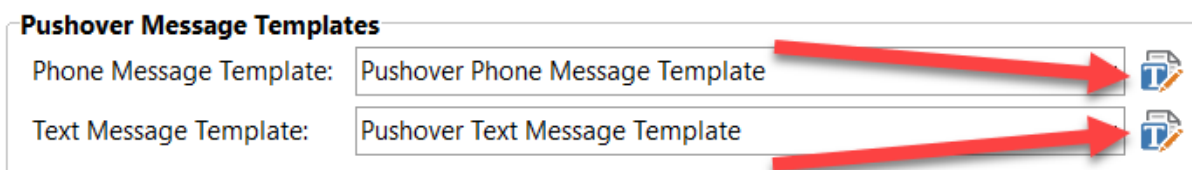


SMS templates tend to be a lot shorter than email templates due to SMS character limits. SMS templates have a limit of 160 characters. It's recommended to keep them shorter than this though as the data that replaces the tags may be longer than the length of the tags.

Refer to the section on Email Templates for instructions on creating and editing templates.

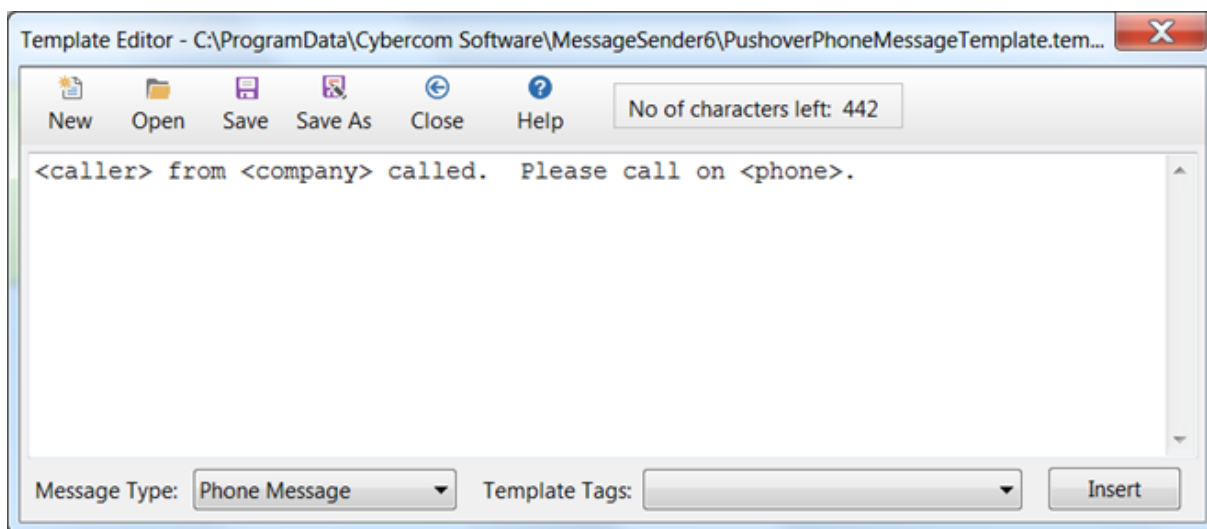
Pushover Templates (2) (2)

MessageSender Manager includes a built-in editor for creating and editing Pushover message templates. To open the editor, click on the **Template Editor** button.



The Template Editor will be displayed. If a message template was specified in the message template field then the Template Editor will automatically open the template for editing. You have a number of choices:

- Edit the template and save it, overwriting the existing one (use **Save**).
- Edit the template and save it as a new template (use **Save As**).
- Create a new template from scratch by clicking the **New** button.



Pushover templates tend to be a lot shorter than email templates, but not as short as SMS templates. Pushover templates have a limit of 498 characters. It's recommended to keep them shorter than this though as the data that replaces the tags may be longer than the length of the tags.

Refer to the section on Email Templates for instructions on creating and editing templates.

Template Tags (2) (2)

The Template Tags that are available for creating and editing message templates are dependant on the type of message selected.

Phone Messages	
<caller>	Name of the person calling.
<cametoseeyou>	Displays an [X] if this is true.
<cametoseeyoulabel>	Displays "Came to See You" unless you have changed it using the LabelEditor utility.
<calldetails>	This will be either "Phoned", "Returned Your Call" or "Came to See You". If you have changed the message labels then those labels will be displayed instead.
<callaction>	This will be either "No Action Required", "Please Phone", "Will Phone Again", "Will Drop By Again", "Wants to See You" or "Will Be In At". If you have changed the message labels then those labels will be displayed instead.
<date>	Date of the message.
<from>	The caller's organization.

<message>	The actual text of the message.
<messagetitle>	By default this is "While You Were Out", unless you have changed it using the LabelEditor utility.
<noaction>	Displays an [X] if this is true.
<noactionlabel>	Displays "Came to See You" unless you have changed it using the LabelEditor utility.
<phone>	The caller's phone number.
<phoned>	Displays an [X] if this is true.
<phonedlabel>	Displays "Came to See You" unless you have changed it using the LabelEditor utility.
<pleasephone>	Displays an [X] if this is true.
<pleasephonelabel>	Displays "Came to See You" unless you have changed it using the LabelEditor utility.
<recipients>	Lists all users the message was sent to.
<returnedcall>	Displays an [X] if this is true.
<returnedcalllabel>	Displays "Came to See You" unless you have changed it using the LabelEditor utility.
<sender>	The person who recorded the message.
<subject>	The subject of the message.
<time>	Time of the message.
<urgent>	Indicates whether the message is urgent or not.
<wantstoseeyou>	Displays an [X] if this is true.
<wantstoseeyoulabel>	Displays "Came to See You" unless you have changed it using the LabelEditor utility.
<willbeinat>	Displays an [X] if this is true.
<willbeinatlabel>	Displays "Came to See You" unless you have changed it using the LabelEditor utility.
<willbeinattext>	The time the user will be in.
<willdropby>	Displays an [X] if this is true.

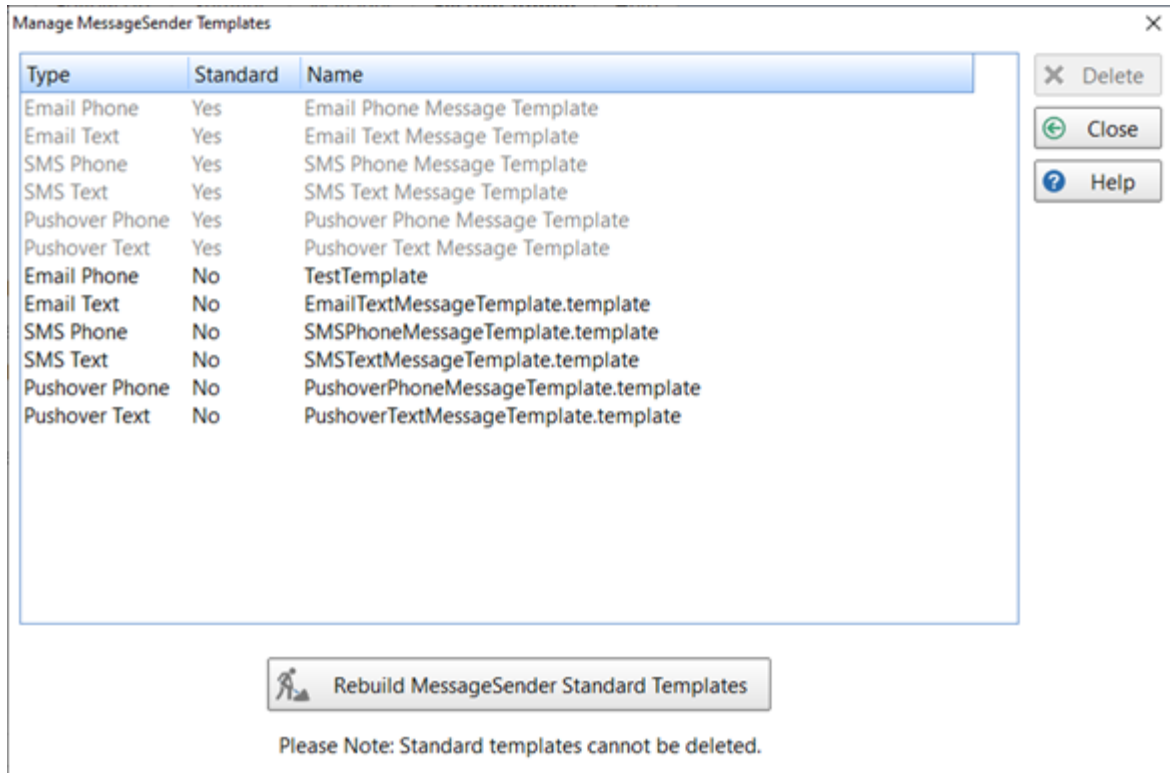
<willdropbylabel>	Displays "Came to See You" unless you have changed it using the LabelEditor utility.
<willphoneagain>	Displays an [X] if this is true.
<willphoneagain label>	Displays "Came to See You" unless you have changed it using the LabelEditor utility.

Text Messages	
<date>	Date of the message.
<message>	The actual text of the message.
<recipients>	Lists all users the message was sent to.
<sender>	The person who recorded the message.
<subject>	The subject of the message.
<time>	Time of the message.
<urgent>	Indicates whether the message is urgent or not.

Managing MessageSender Templates

To delete a custom template, select it from the list and click the **Delete** button.

Standard templates cannot be deleted.



If for some reason the standard templates don't exist, click the **Rebuild MessageSender Standard Templates** button.

Important Information

Internet Access

It is important that the PhonePad 5 Server has access to the Internet. If the PhonePad 5 Server doesn't have access then some of the features will not work.

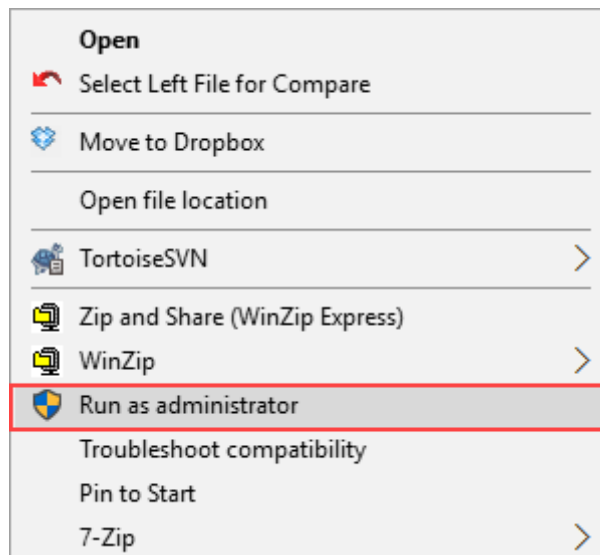
You may need to configure the firewall or security software on your Server or Host PC to allow PhonePad 5 server to connect to the Internet.

Running Programs as an Administrator

When running some of the PhonePad 5 programs, you may get an Access Denied error message or a message that says the program requires elevated privileges. This can happen even when you are a fully-fledged Windows administrator.

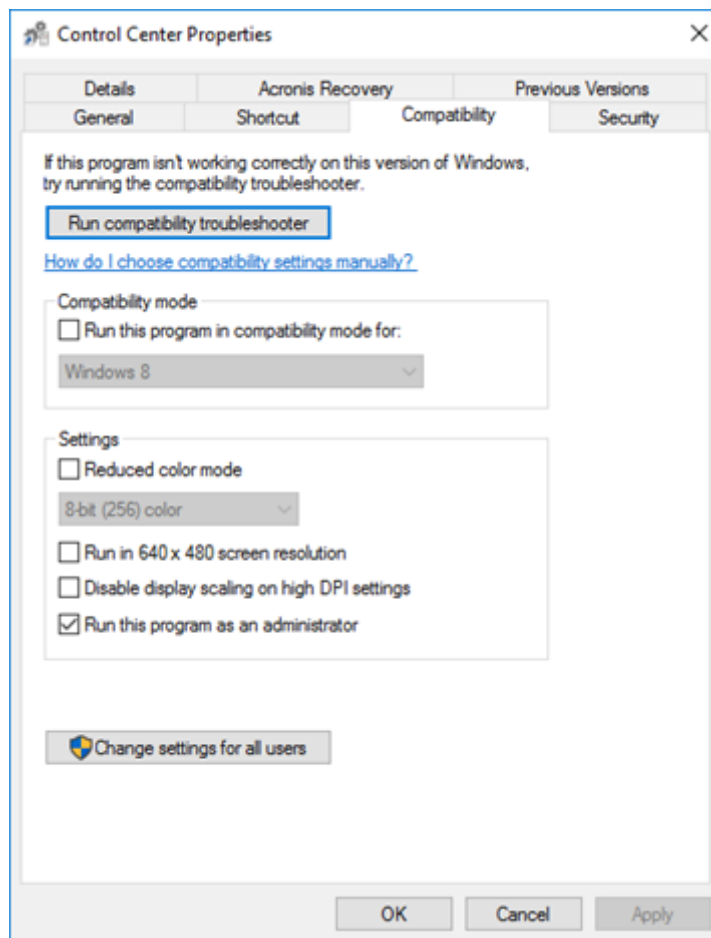
This has nothing to do with the PhonePad software and everything to do with how Windows handles user access rights.

You can normally get around this problem by right-clicking on the application and selecting **Run as Administrator** from the menu.



You will need to do this each time you run one of these applications. There is a way you can get Windows to "remember" that you want to run the application as an Administrator.

Right-click on the application but this time select **Properties**. Next, select the **Compatibility** tab and check the **Run this program as an administrator** check box. Then click **OK**.



Chapter

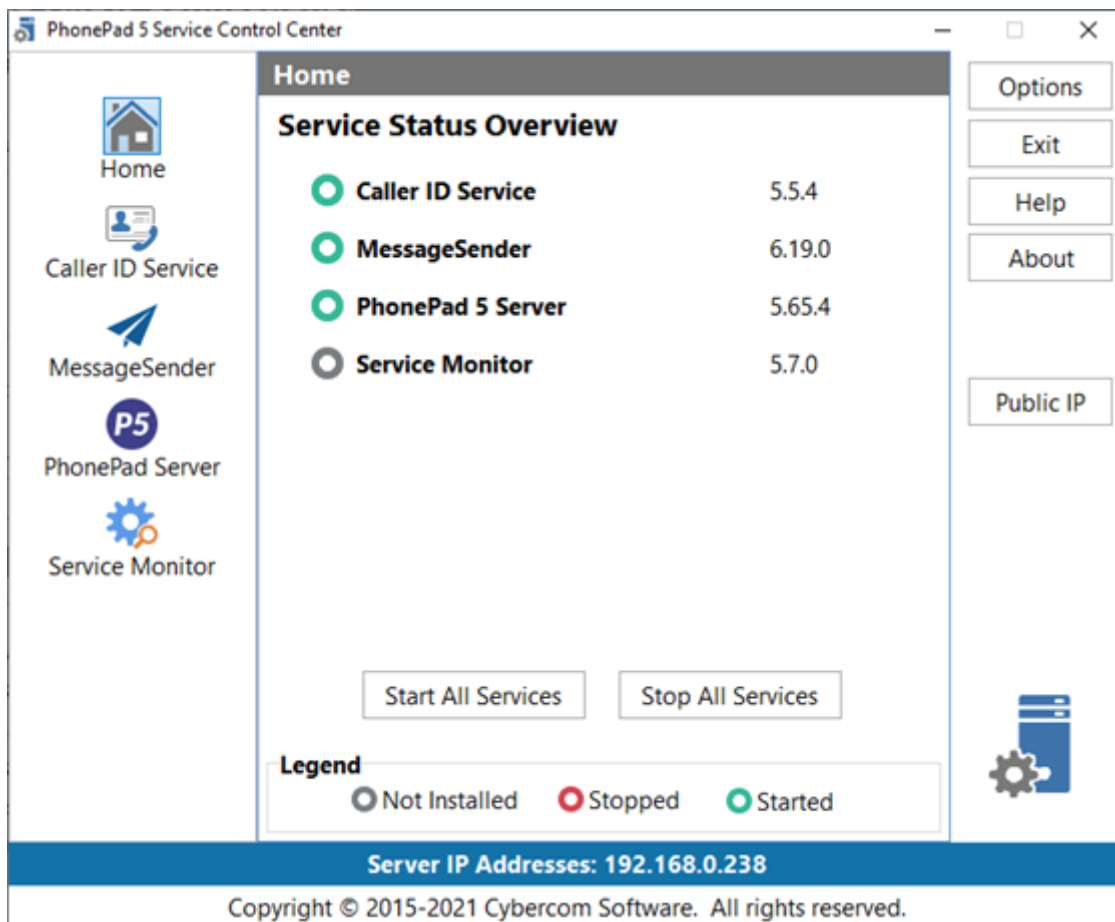
6

Managing PhonePad Services




Managing PhonePad Services

Included with PhonePad 5 Server is an application called **Control Center**, which makes it easy to:

- Install and uninstall the PhonePad services.
- Start and stop the PhonePad 5 services.



When you start **Control Center** it will default to the **Home** view. This screen shows you the current status of each PhonePad service.

-  The service is running.
-  The service is installing but isn't running.
-  The service is not installed.

The IP Address of the Server or Host PC is displayed at the bottom part of the application window.

Control Center provides the ability to individually control each service, but you can all control all services at once by using the **Start All Services** and **Stop All Services** buttons.

You can also start and stop individual services using the Windows **services.msc** snap-in control service, however, you will find that Control Center provides a more convenient and easier to use way to do this.



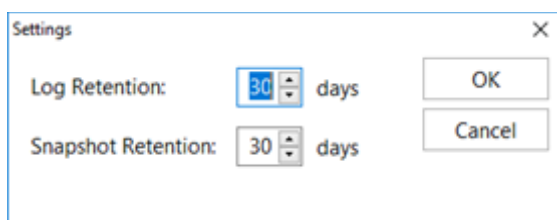
If you double-click on the blue band displaying the **Server IP Address**, the IP Address will be copied to the Windows clipboard.

Options

PhonePad creates log files that can be used to make sure the system is functioning correctly and to check for any problems that may be occurring. Most of the PhonePad applications and services have their own log files and a new log file is created each day.

After a while you can end up with a lot of log files. Although each log file on its own tends to be relatively small, over a period of time they can consume some of your disk space. To combat this, and to avoid you having to delete older log files manually, PhonePad includes a console program called **LogManager**. This runs automatically each day on both the Server or Host PC and all workstations.

This screen enables you to configure the oldest log files to retain. The range is from 5 days to 90 days. The default is 30 days.

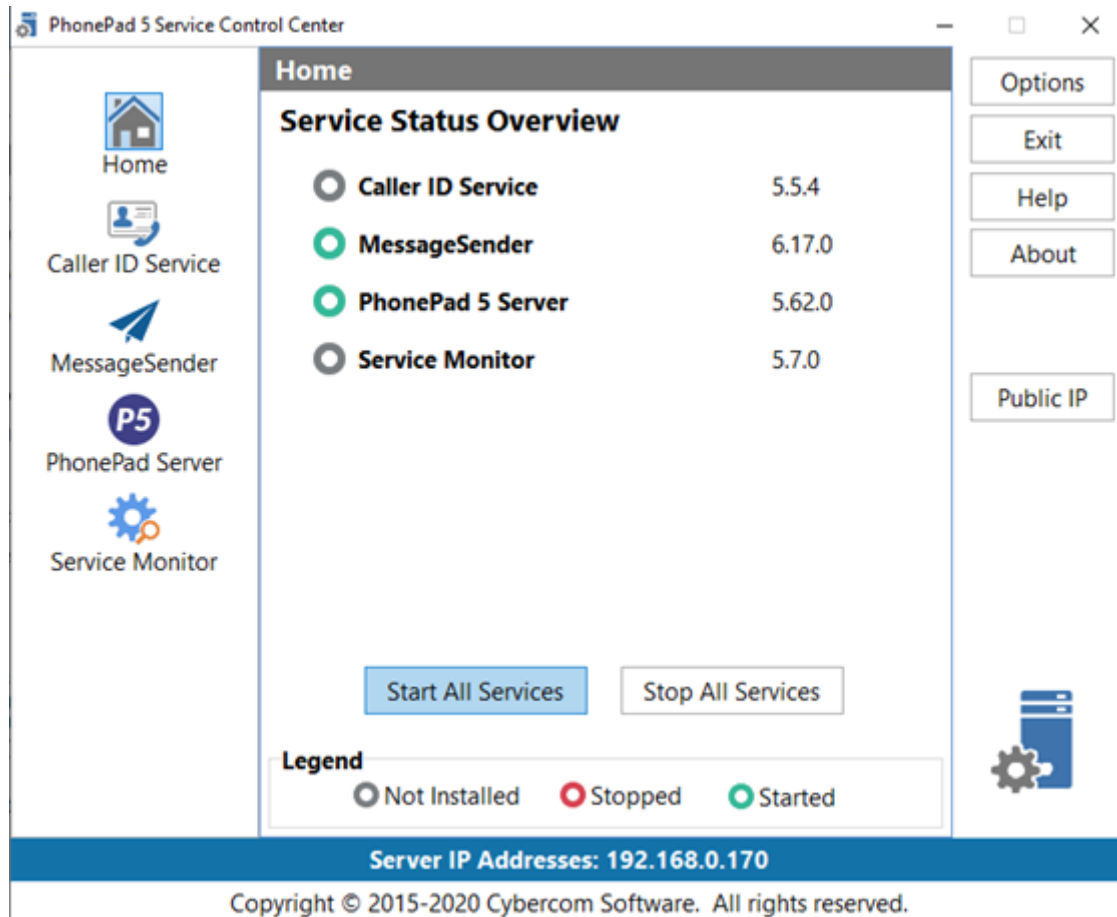


PhonePad also creates snapshots when you install a server update so that you can quickly revert back to the previous version in the event there is an issue with the new version. Snapshots are like a backup but they also include the PhonePad Server application files as well as your database.

Snapshots can get quite large and having a few of them on your Server or Host PC can consume a lot of disk space. Just like the log files, you can specify how long you want to retain the snapshots. Bear in mind that, unless you manually create snapshots, they are only created when you install a server update.

Server IP Address

On startup, **Control Center** will check the Server or Host PC's IP Address.



The Server's IP Address will be displayed at the bottom of the window. If there are multiple IP Addresses on your Server or Host PC then they will all be displayed.

Multiple IP Addresses

If your Server or Host PC has multiple IP addresses and you need to change which one PhonePad 5 Server uses, click the **Settings** button and enter a new IP Address.

Server Settings

Support Use Only

OK

Cancel

Help

The **Override IP Address** field should be **blank**, unless you are overriding the Server or Host PC's IP Address.

The only time you should enter an IP Address in this field is if there are **multiple IP Addresses** on this machine and you want to specify which one PhonePad 5 Server should use.

Detected IP Address:

192.168.0.170

Add Override

Override IP Address:

Delete Override

Server Port:

12600

Server Folder:

C:\ProgramData\Cybercom Software\PhonePad5S

Server Access Key:

hHzEffHGFBbb

Register

Deregister

REGISTERED

☒ Activity Logs

Performance Boost

Clicking the **Scan IP** button allows you to manually scan for multiple IP Addresses on the computer.

Detected IP Addresses	ControlCenter will attempt to detect all active IP Addresses of the host machine and display them in this field. These addresses will be sent to workstations attempting to connect to the Server.
Add Override	Click this button to use the selected IP Address as the only address to be used. This only makes sense if your Server has multiple IP Addresses (eg. it has both an Ethernet connection and a Wireless connection).
Override IP Address	This should be left blank unless your Server or Host PC has multiple IP Addresses and you need to specify which IP Address to use.
Delete Override	Deletes the existing override.
Server Port	The main data connection port for PhonePad. Do not change this unless there is a conflict with another process using the same port.
Server Folder	Shows the location of the PhonePad 5 Server Folder. This setting cannot be edited.

Server Access Key	PhonePad's Auto-Discovery protocol uses UDP. On some networks this may be blocked. If you find that workstations are unable to find the PhonePad Server then you can use a Server Access Key that can be used by workstations. The small buttons to the right of this field generate a Server Access Key and copy the key to the Windows clipboard, respectively.
Register	Registers the Server Access Key. This must be done for the Server Access Key to work.
Deregister	Deregisters the Server Access Key, which means users will no longer be able to use it.
Registration Status	This will show either Registered or Unregistered.
Activity Logs	When checked, the service logs it processes and any errors it may encounter. It's recommended you have this checked.
Performance Boost	Displays the Performance Boost screen.



Control Center will automatically add the necessary inbound and outbound exception rules to the Windows Firewall on the Server or Host PC so that PhonePad 5 on your workstations can connect to and communicate with the PhonePad 5 Server on your Server or Host PC.

Performance Boost (2)

This feature increases performance by buffering some database objects in memory. Normally when an object such as a table is read from or written to, it is done directly from/to the Server or Host PC's hard-drive. By holding the table in a memory buffer this can significantly improve performance. By default, any changes to the table in memory will be written to the hard-drive on these events:

- Every couple of minutes
- When the memory buffer is full
- When a database backup is about to be performed.
- When the PhonePad Server is shut down.

Enabling **Performance Boost** can improve performance significantly.

Server Performance Boost

Performance Boost can dramatically improve PhonePad performance by buffering some data in memory instead of constantly writing to the Server's hard-drive.

☒ Enable Performance Boost

Performance Boost Settings

These settings **directly affect system performance** so it's important that they are only changed under the advice of Cybercom Software technical support.

Dirty Buffer Flush Check Interval: secs

File Specification	Block Size	Buffer Size	Flush Age	To Disk
*DBConfig.config	64	128	30	<input checked="" type="checkbox"/>
*DBCatalog.catalog	64	128	30	<input checked="" type="checkbox"/>
*AddressBook.table	64	64	30	<input checked="" type="checkbox"/>
*AddressBook.index	64	64	30	<input checked="" type="checkbox"/>
*AddressBook.blob	64	64	30	<input checked="" type="checkbox"/>
*ArchivedFollowUpNotes.table	64	64	30	<input checked="" type="checkbox"/>
*ArchivedFollowUpNotes.index	64	64	30	<input checked="" type="checkbox"/>
*ArchivedFollowUpNotes.blob	64	64	30	<input checked="" type="checkbox"/>
*ArchivedMessages.table	64	64	30	<input checked="" type="checkbox"/>
*ArchivedMessages.index	64	64	30	<input checked="" type="checkbox"/>
*ArchivedMessages.blob	64	64	30	<input checked="" type="checkbox"/>
*AutoForwardQueue.table	64	64	30	<input checked="" type="checkbox"/>
*AutoForwardQueue.index	64	64	30	<input checked="" type="checkbox"/>

OK

Cancel

Reset

Help

Buffer settings may be changed over time via system updates to get the best performance for your system.

Do not change any of the Performance Boost settings unless advised to by a Cybercom Support technician. Incorrect settings could result in adverse system performance and even data loss.

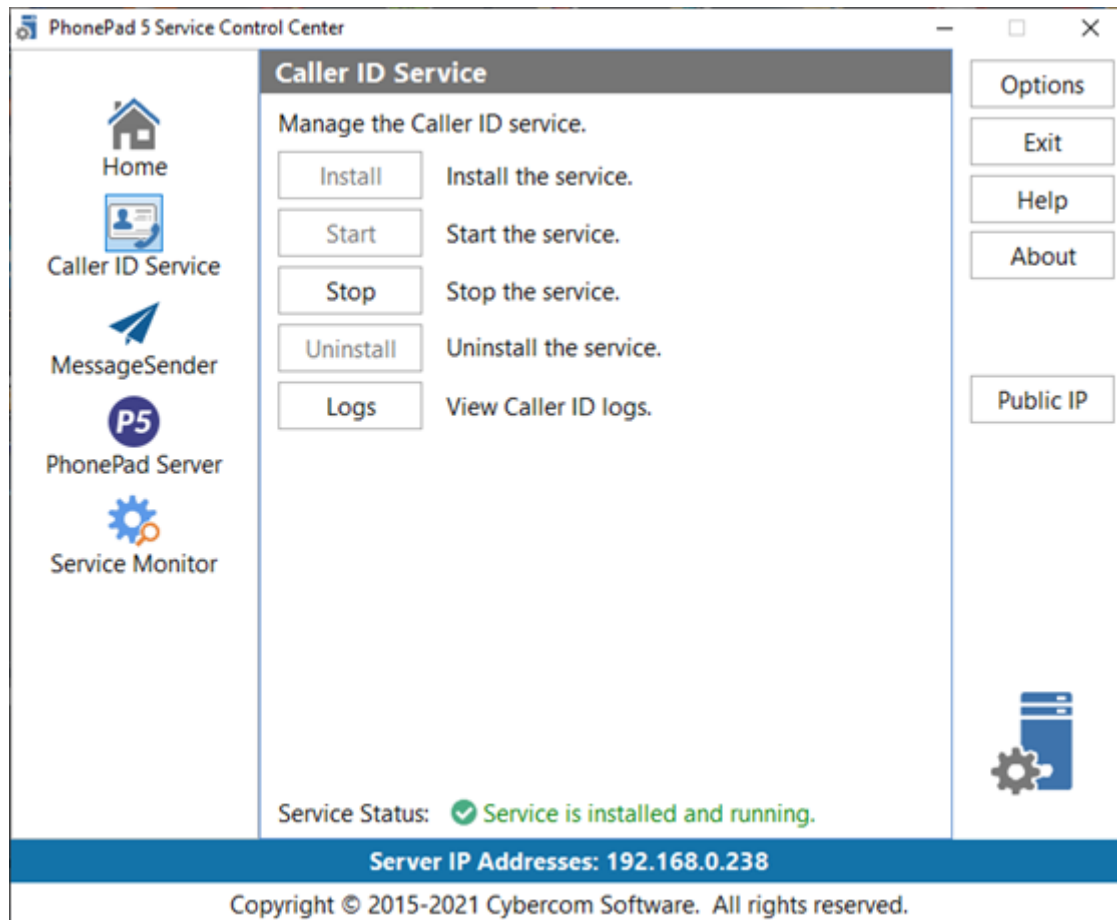
Although a very low possibility, there is a potential for data loss when Performance Boost is enabled. This can happen if the Server or Host PC crashes, is suddenly powered down, or loses power. In those events the PhonePad Server will most likely not have had time to write any changes to disk.

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Caller ID Service

The Caller ID Service is specifically for use with CallerID.com devices, available from www.callerid.com. This service is not installed by default so you will need to install it if required.

Select **Caller ID Service** to manage the **Caller ID** service.



Install	Installs the Caller ID service.
Start	Starts the Caller ID service.
Stop	Stops the Caller ID service.
Uninstall	Uninstalls the Caller ID service.
Settings	Opens the Settings window. There are currently no user-configurable settings so the button is disabled.
Logs	Opens the Log Viewer and displays the Caller ID logs.

Service Status	Indicates the current status of the Caller ID service.
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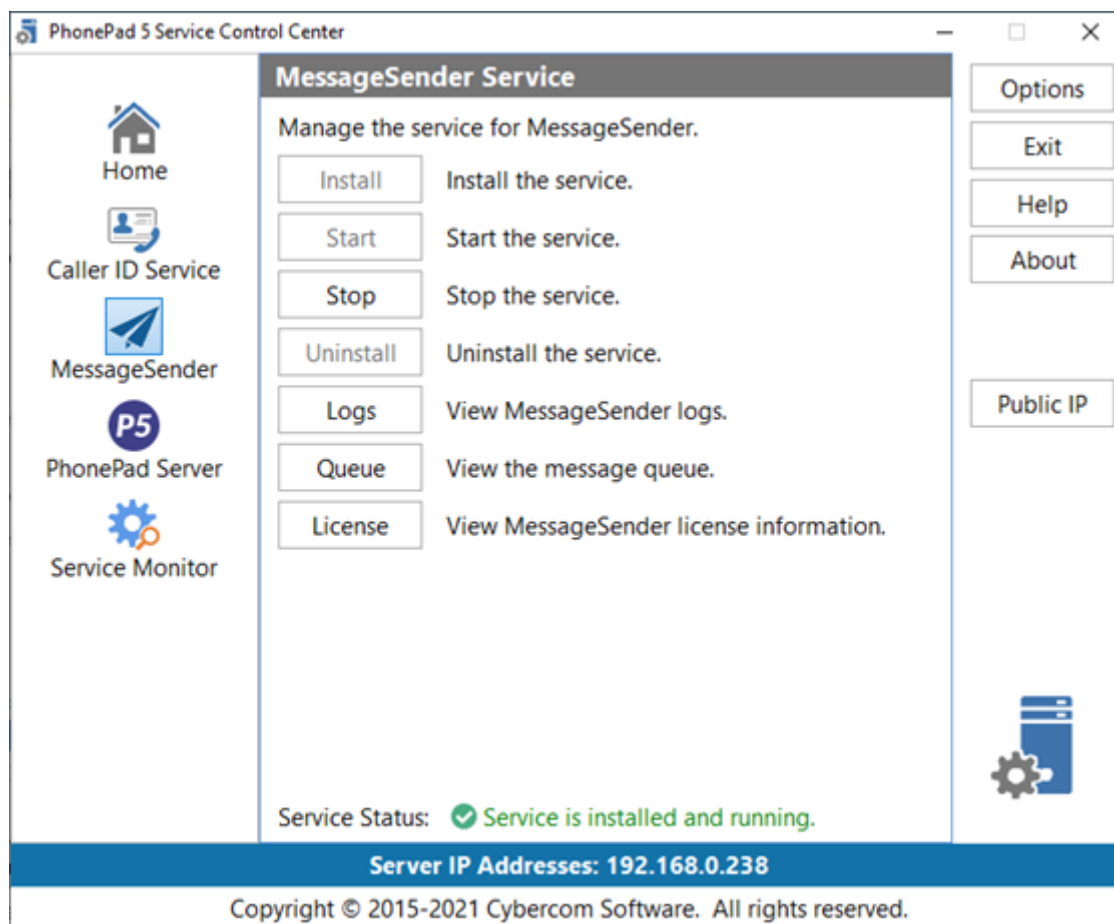


If you get an *Access Denied* error when trying to install or start the service, close the Control Center. Find the ControlCenter application in the folder you installed the server in, right-click on it, and then select **Run as Administrator**.

MessageSender

The MessageSender service is an integral part of the Automatic Message Forwarding feature. Without it, this feature will not work. MessageSender is not installed by default as it is a separate product that you will need to purchase a license for if you don't have one.

Select **MessageSender** to manage the MessageSender service.



Install	Installs the MessageSender service.
Start	Starts the MessageSender service.
Stop	Stops the MessageSender service.
Uninstall	Uninstalls the MessageSender service.
Logs	Opens the Log Viewer and displays the MessageSender logs.
Manager	Opens MessageSender Manager.
Service Status	Indicates the current status of the MessageSender service.

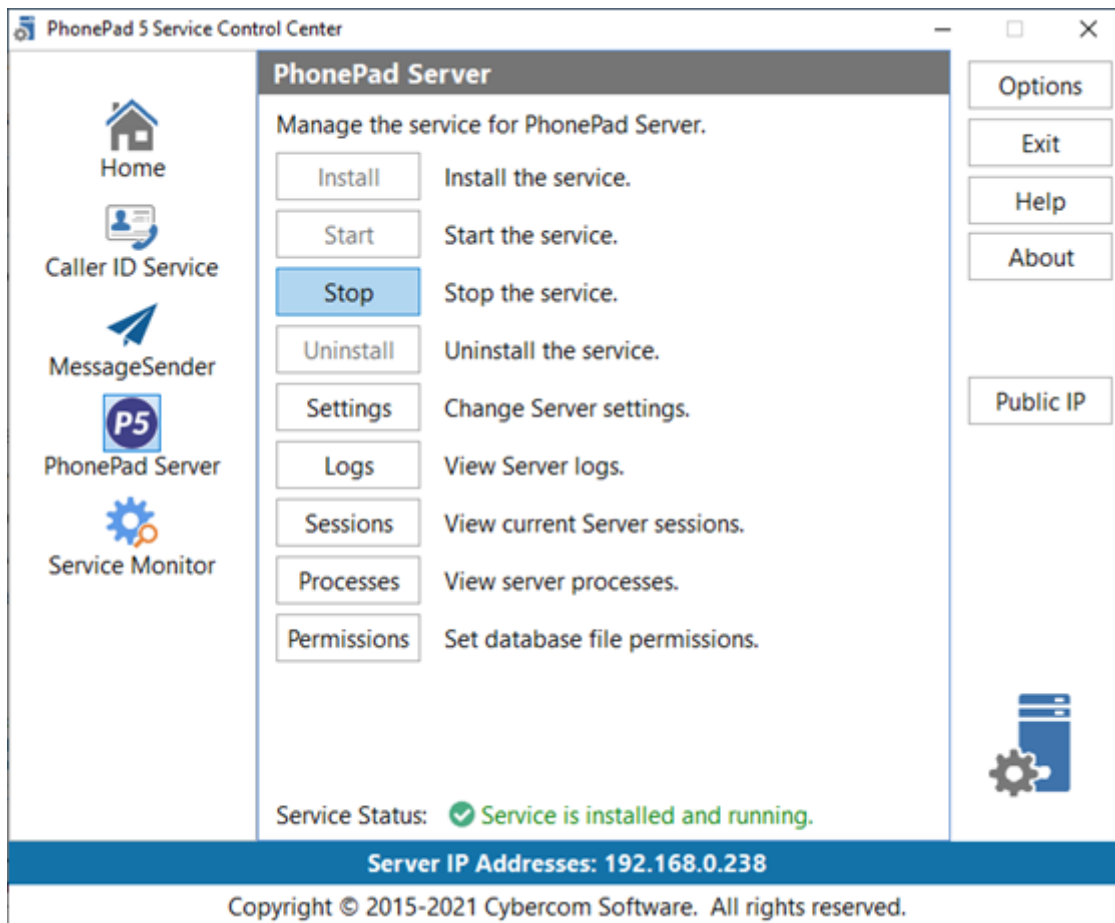


If you get an *Access Denied* error when trying to install or start the service, close the Control Center. Find the ControlCenter application in the folder you installed the server in, right-click on it, and then select **Run as Administrator**.

PhonePad 5 Server

PhonePad 5 will not function without the PhonePad 5 Server service running. It is normally installed by default so you should not need to install it.

Select **PhonePad Server** to manage the PhonePad Server service.



Install	Installs the Server service.
Start	Starts the Server service.
Stop	Stops the Server service.
Uninstall	Uninstalls the Server service.
Settings	Opens the Server Settings window.
Logs	Opens the Log Viewer and displays the Server logs.
Sessions	Displays all current user sessions connected to the Server.
Processes	Opens the Process Monitor application. Use this to make sure the Server is listening on all required ports.
Permissions	This can be used to set the correct permissions for the PhonePad Server folders to avoid access rights errors.

Service Status	Indicates the current status of the PhonePad Server service.
-----------------------	--



If you get an *Access Denied* error when trying to install or start the service, close the Control Center. Find the ControlCenter application in the folder you installed the server in, right-click on it, and then select **Run as Administrator**.

Processes

ProcessMonitor displays all PhonePad 5 services currently running on the Server or Host PC.

Process	ID	Local Address	Local Port	Protocol	Status
PhonePad5Server.exe	13476	JUPITER2	12600	TCP	Listen
NotificationService.exe	4856	JUPITER2	12601	UDP	
MessageSender6.exe	20036	10.0.0.82	12602	UDP	
ServerAutoUpdate.exe	25524	10.0.0.82	12610	TCP	Listen
MessageSender6.exe	20036	10.0.0.82	12611	TCP	Listen
PhonePad5Server.exe	13476	JUPITER2	15350	UDP	

Process	Name of the service.
ID	Process ID as assigned by Windows.
Local Address	This is either the local IP Address or the host system's name.
Local Port	The port the service is using.
Protocol	The protocol used by the server which will be either TCP or UDP.
Status	This will be <i>Listen</i> if the service is using the TCP protocol and is accepting data. It will be blank for UDP services.

Sessions

The **Server Sessions** windows displays all user connections to the PhonePad 5 Server. Any users that appears on this list is currently logged in to PhonePad.

Server Sessions				
Session ID	User	IP Address	Process	Last Connected
3	Admin	10.0.0.82	JUPITER2:23756	16/05/2018 9:17:16 PM
Session Count: 1				

Session ID	An internal ID assigned by the PhonePad 5 Server.
User	The name of the user who is logged in.
IP Address	IP Address of the user's workstation.
Process	This is the user's computer name and the Process ID assigned by Windows.
Last Connected	This is the date and time the user logged in.

Settings

These settings are for the PhonePad 5 Server and normally should not need to be changed.

Server Settings

The default settings shown here should always be used unless you have a specific reason for not doing so.

Server Settings Support Use Only

The **Override IP Address** field should be **blank**, unless you are overriding the Server or Host PC's IP Address.

The only time you should enter an IP Address in this field is if there are **multiple IP Addresses** on this machine and you want to specify which one PhonePad 5 Server should use.



Detected IP Address: 192.168.0.33

Override IP Address: Delete Override

Server Port: 12600

Notifications Port: 12601

Server Folder: C:\ProgramData\Cybercom Software\Phor

Server Access Key: hHzEffHGFBbb  

Register Deregister REGISTERED

☒ Activity Logs Performance Boost

OK Cancel Scan IP Help

Server IP Address	This is the detected IP Address.
Override IP Address	This should be left blank unless your Server or Host PC has multiple IP Addresses and you need to specify which IP Address to use.
Delete Override	Removes any IP Address from the Server IP Address field. You can also clear the field out yourself. Remember to click OK to save this change.
Server Port	The main data connection port for PhonePad. Do not change this unless there is a conflict with another process using the same port.
Notifications Port	The port used by the server to send message notifications to workstations. Do not change this unless there is a conflict with another process using the same port.
Server Folder	Shows the location of the PhonePad 5 Server folder. This setting cannot be edited.
Server Access Key	<p>If your workstations are unable to find the PhonePad Server on your network, you can create a Server Access Key.</p> <p>First, click the green padlock button to create a Server Access Key. The key next to that can be used to copy the key to the Windows Clipboard. This key will need to be entered into Workstation Config on each workstation.</p>

	<p>Then click the Register button to register the key with the Server Access Key system on our web server. If the registration is successful, a green Registered icon will be displayed.</p> <p>Important: The Server needs to be able to access the Internet for this feature to work.</p>
Activity Logs	When checked, the service logs it processes and any errors it may encounter. It's recommended you have this checked.
Performance Boost	Displays the Performance Boost screen.
Scan IP	Scans the Server or Host PC for multiple IP Addresses.

Performance Boost

This feature increases performance by buffering some database objects in memory. Normally when an object such as a table is read from or written to, it is done directly from/to the Server or Host PC's hard-drive. By holding the table in a memory buffer this can significantly improve performance. By default, any changes to the table in memory will be written to the hard-drive on these events:

- Every couple of minutes
- When the memory buffer is full
- When a database backup is about to be performed.
- When the PhonePad Server is shut down.

Enabling **Performance Boost** can improve performance significantly.

Server Performance Boost

Performance Boost can dramatically improve PhonePad performance by buffering some data in memory instead of constantly writing to the Server's hard-drive.

☒ Enable Performance Boost

Performance Boost Settings

These settings **directly affect system performance** so it's important that they are only changed under the advice of Cybercom Software technical support.

Dirty Buffer Flush Check Interval: secs

File Specification	Block Size	Buffer Size	Flush Age	To Disk
*DBConfig.config	64	128	30	<input checked="" type="checkbox"/>
*DBCatalog.catalog	64	128	30	<input checked="" type="checkbox"/>
*AddressBook.table	64	64	30	<input checked="" type="checkbox"/>
*AddressBook.index	64	64	30	<input checked="" type="checkbox"/>
*AddressBook.blob	64	64	30	<input checked="" type="checkbox"/>
*ArchivedFollowUpNotes.table	64	64	30	<input checked="" type="checkbox"/>
*ArchivedFollowUpNotes.index	64	64	30	<input checked="" type="checkbox"/>
*ArchivedFollowUpNotes.blob	64	64	30	<input checked="" type="checkbox"/>
*ArchivedMessages.table	64	64	30	<input checked="" type="checkbox"/>
*ArchivedMessages.index	64	64	30	<input checked="" type="checkbox"/>
*ArchivedMessages.blob	64	64	30	<input checked="" type="checkbox"/>
*AutoForwardQueue.table	64	64	30	<input checked="" type="checkbox"/>
*AutoForwardQueue.index	64	64	30	<input checked="" type="checkbox"/>

OK

Cancel

Reset

Help

Buffer settings may be changed over time via system updates to get the best performance for your system.

Do not change any of the Performance Boost settings unless advised to by a Cybercom Support technician. Incorrect settings could result in adverse system performance and even data loss.

Although a remote possibility, there is a potential for data loss when Performance Boost is enabled. This can happen if the Server or Host PC crashes, is suddenly powered down, or loses power. In those events the PhonePad Server will most likely not have had time to write any changes to disk.

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Scan IP Addresses

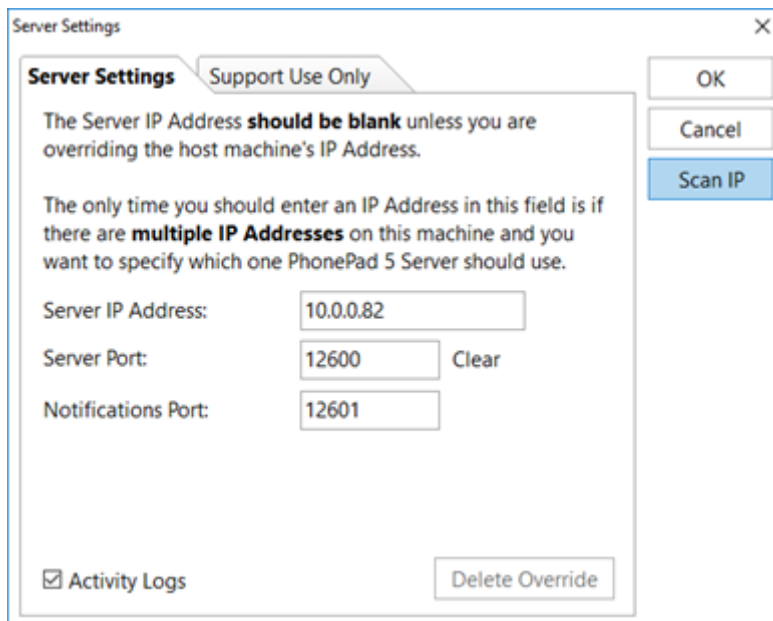
If you suspect your Server or Host PC may have multiple IP Address then this feature can find out for you.

Multiple IP Address can be caused by having more than one network interface card installed on the machine. It can also happen if the computer has both an Ethernet and Wireless connection.



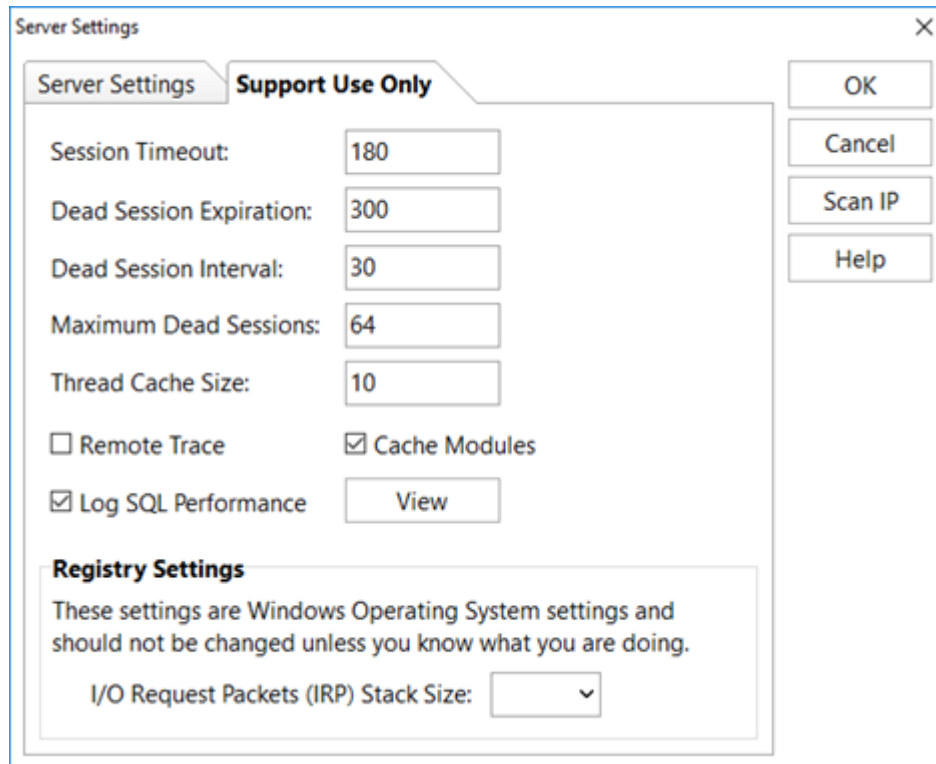
Any IP Addresses found will be listed. Select the correct IP Address and click **Close**.

The IP Address will be added to the **Server IP Address** field. We call this an override.



Support Use Only

As the tab says, settings on this screen should only be changed by Cybercom Software Support technicians, or changed if advised to by a technician. The reason for this is that the wrong settings can adversely affect system performance.



The screenshot shows a 'Server Settings' dialog box with a 'Support Use Only' tab selected. The dialog contains several configuration fields and checkboxes. On the right side, there are buttons for 'OK', 'Cancel', 'Scan IP', and 'Help'. The 'Registry Settings' section at the bottom contains a warning message and a dropdown menu for 'I/O Request Packets (IRP) Stack Size'.

Setting	Value
Session Timeout:	180
Dead Session Expiration:	300
Dead Session Interval:	30
Maximum Dead Sessions:	64
Thread Cache Size:	10

☐ Remote Trace ☒ Cache Modules

☒ Log SQL Performance [View](#)

Registry Settings

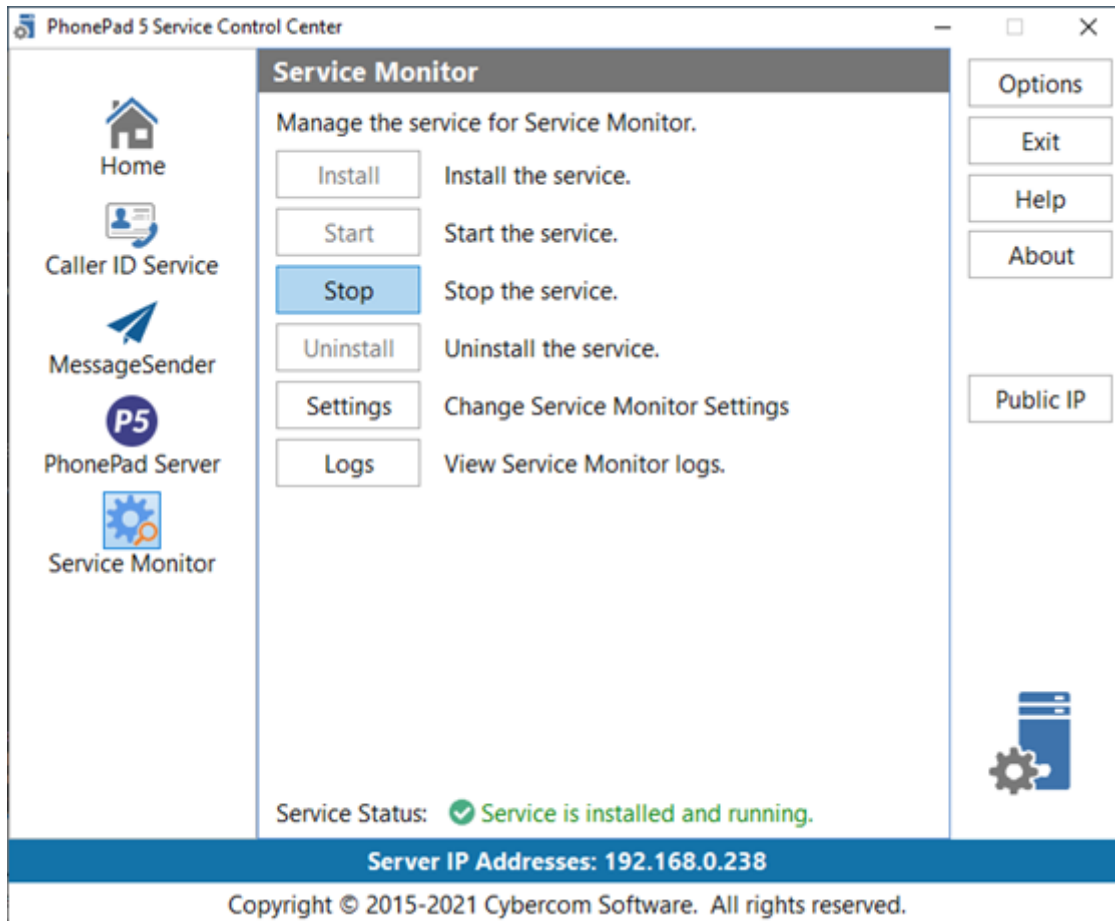
These settings are Windows Operating System settings and should not be changed unless you know what you are doing.

I/O Request Packets (IRP) Stack Size: ▼

Service Monitor

Service Monitor is used to monitor a number of PhonePad 5 services. When installed, it will automatically restart the services that have stopped for some reason. This service is not installed by default so you will need to install it if required.

Select **Service Monitor** to manage the Service Monitor service.



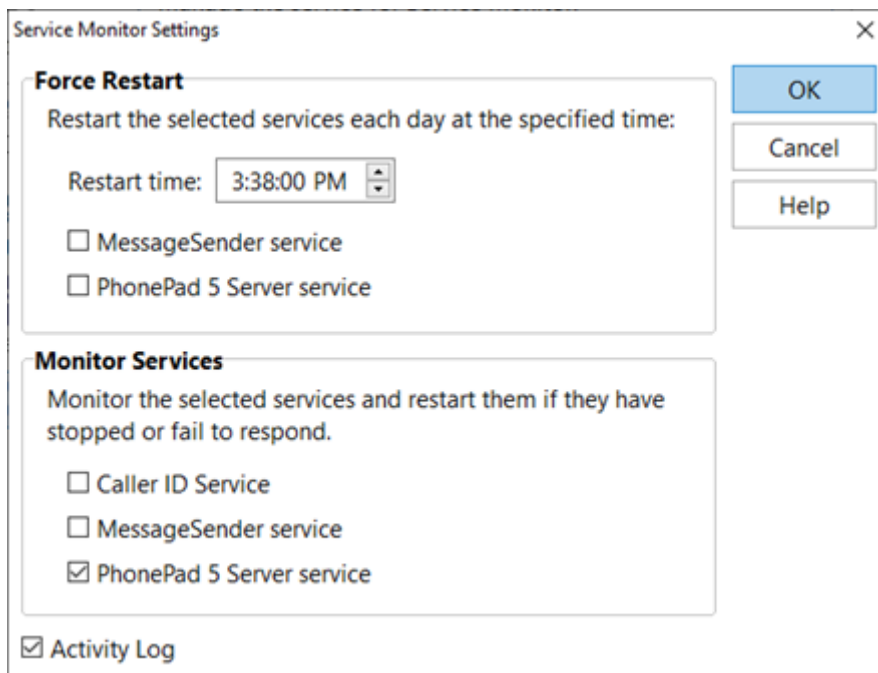
Install	Installs the Server service.
Start	Starts the Server service.
Stop	Stops the Server service.
Uninstall	Uninstalls the Server service.
Settings	Opens the Service Monitor settings window.
Logs	Opens the Log Viewer and displays the Service Monitor logs.
Service Status	Indicates the current status of the PhonePad Server service.



If you get an *Access Denied* error when try to install or start the service, close the Control Center. Find the ControlCenter application in the folder you installed the server in, right-click on it, and then select **Run as Administrator**.

Settings

These settings are used by the Service Monitor service to manage some of the other PhonePad services. They can be used to automatically restart the services at a set time each day, or to restart the services when Service Monitor detects that they are no longer responding.



The image shows a 'Service Monitor Settings' dialog box. It has a title bar with a close button (X). The dialog is divided into two main sections: 'Force Restart' and 'Monitor Services'. The 'Force Restart' section has a description 'Restart the selected services each day at the specified time:', a 'Restart time' field set to '3:38:00 PM' with up/down arrows, and two checkboxes: 'MessageSender service' and 'PhonePad 5 Server service', both of which are unchecked. The 'Monitor Services' section has a description 'Monitor the selected services and restart them if they have stopped or fail to respond.' and three checkboxes: 'Caller ID Service' (unchecked), 'MessageSender service' (unchecked), and 'PhonePad 5 Server service' (checked). At the bottom of the dialog is an 'Activity Log' checkbox, which is checked. On the right side of the dialog are three buttons: 'OK' (highlighted in blue), 'Cancel', and 'Help'.

Service Monitor Settings

Force Restart
Restart the selected services each day at the specified time:

Restart time: 3:38:00 PM

☐ MessageSender service
☐ PhonePad 5 Server service

Monitor Services
Monitor the selected services and restart them if they have stopped or fail to respond.

☐ Caller ID Service
☐ MessageSender service
☒ PhonePad 5 Server service

☒ Activity Log

OK
Cancel
Help

It shouldn't be necessary to use these settings at all unless there is some unknown process on the Server or Host PC conflicting with one or more PhonePad services.

WebSync Service

Enter topic text here.

Chapter



7

Automatic Message Forwarding

Automatic Message Forwarding

Automatic Message Forwarding allows you to receive your PhonePad 5 messages via email, or have them sent directly to your cell/mobile phone using SMS or Pushover. This is ideal for users that work remotely, are on the road, or are temporarily out of the office. To use this feature you need to install MessageSender on your Server or Host PC and configure PhonePad to use Automatic Message Forwarding.

Setting Up Automatic Message Forwarding

There are 4 main steps required to get **Automatic Message Forwarding** working.

Step 1: Install the MessageSender 6 Service

The first step is to install the MessageSender 6 Service.

Step 2: Configure the MessageSender 6 Service

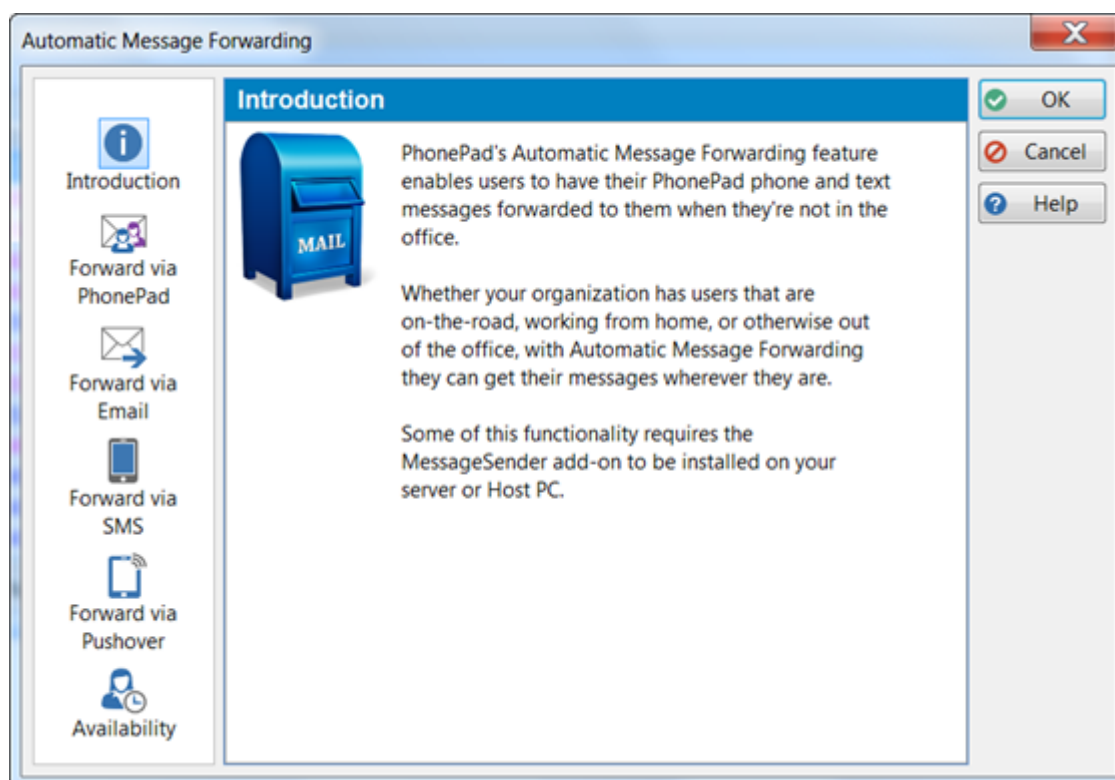
The second step is to configure it in MessageSender Manager.

Step 3: Adding Communication Settings

The third step is to set up the Communication Settings in PhonePad 5 for Email, SMS and/or Pushover.

Step 4: User Settings

And the final step is for each user to configure their forwarding settings by selecting **Automatic Message Forwarding** from the **Tools** menu.



Download MessageSender 6

Download the MessageSender 6 installer (messagesender6setup.exe) from the download page of the Cybercom Software website.

Installing MessageSender 6 on a Server or Host PC

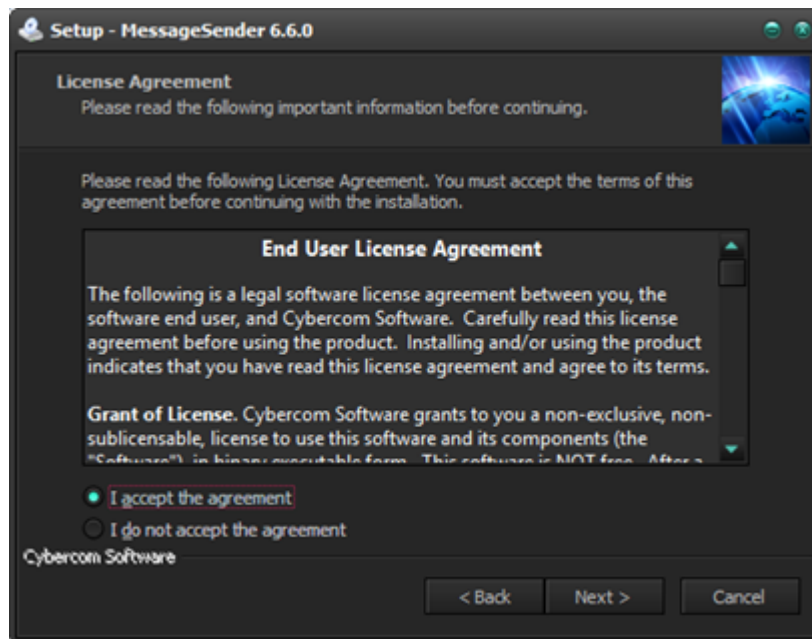
MessageSender should be installed on the same computer as the PhonePad 5 Server, ie. the Server or Host PC. The MessageSender service runs under the Windows system account and, due to Windows restrictions, it cannot access drives located on another computer.

Follow these steps to install MessageSender 6:

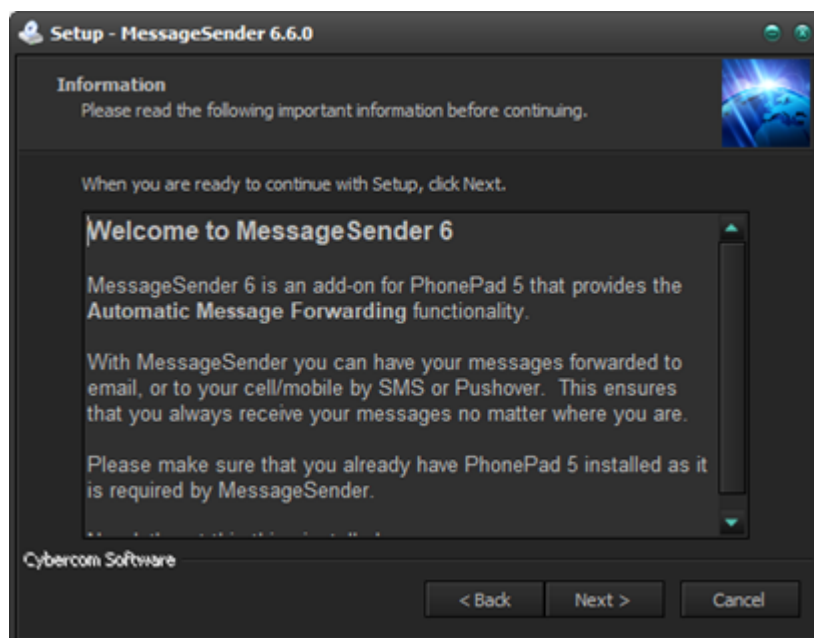
1. Run the installer (messagesender6setup.exe).
2. When the Welcome screen appears, click **Next** to continue.



4. Read the **End User License Agreement**. Select **I accept the agreement** and then click **Next**.



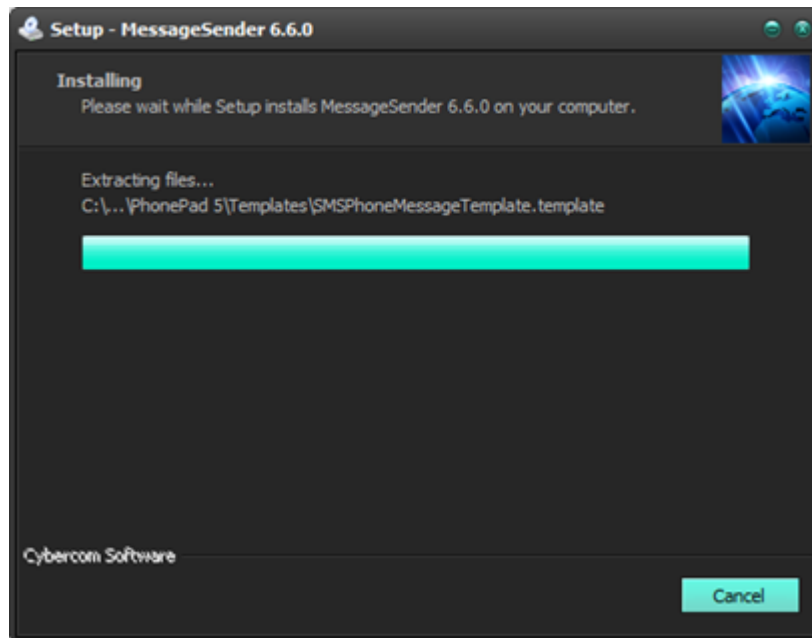
5. Read the information on this screen, and then click **Next**.



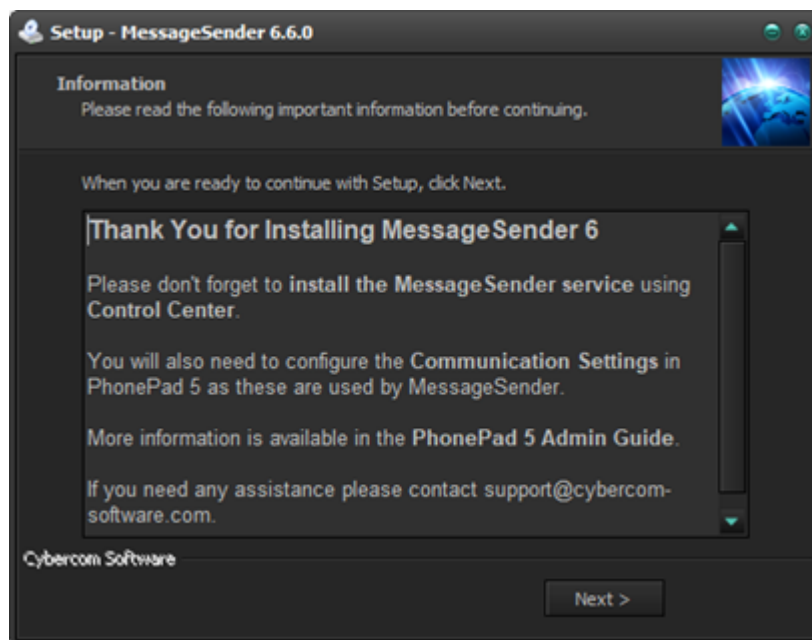
6. Click the **Install** button to begin installation.



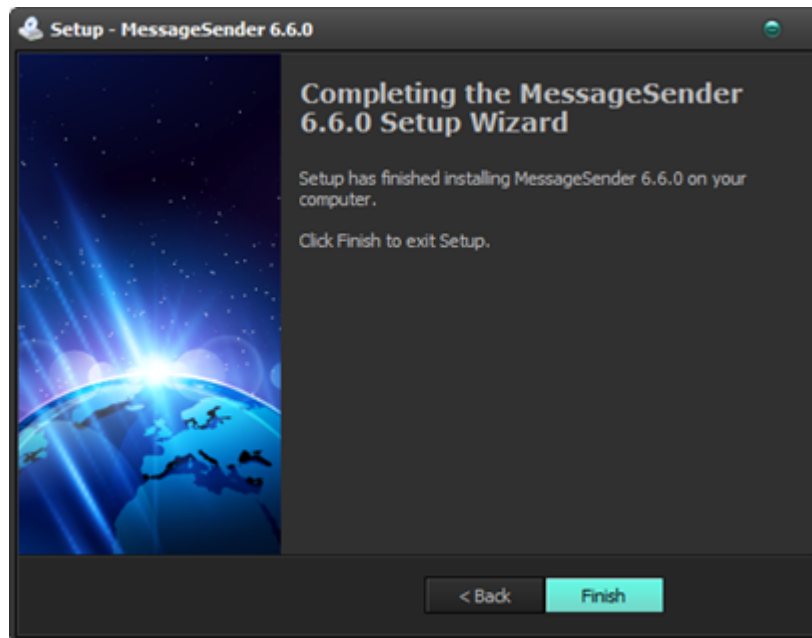
7. MessageSender 6 will now install. It should only take a few seconds.



9. Once the install has finished, information about installing the MessageSender service will be displayed. Click **Next** to continue.



10. Click **Finish** to complete the install.

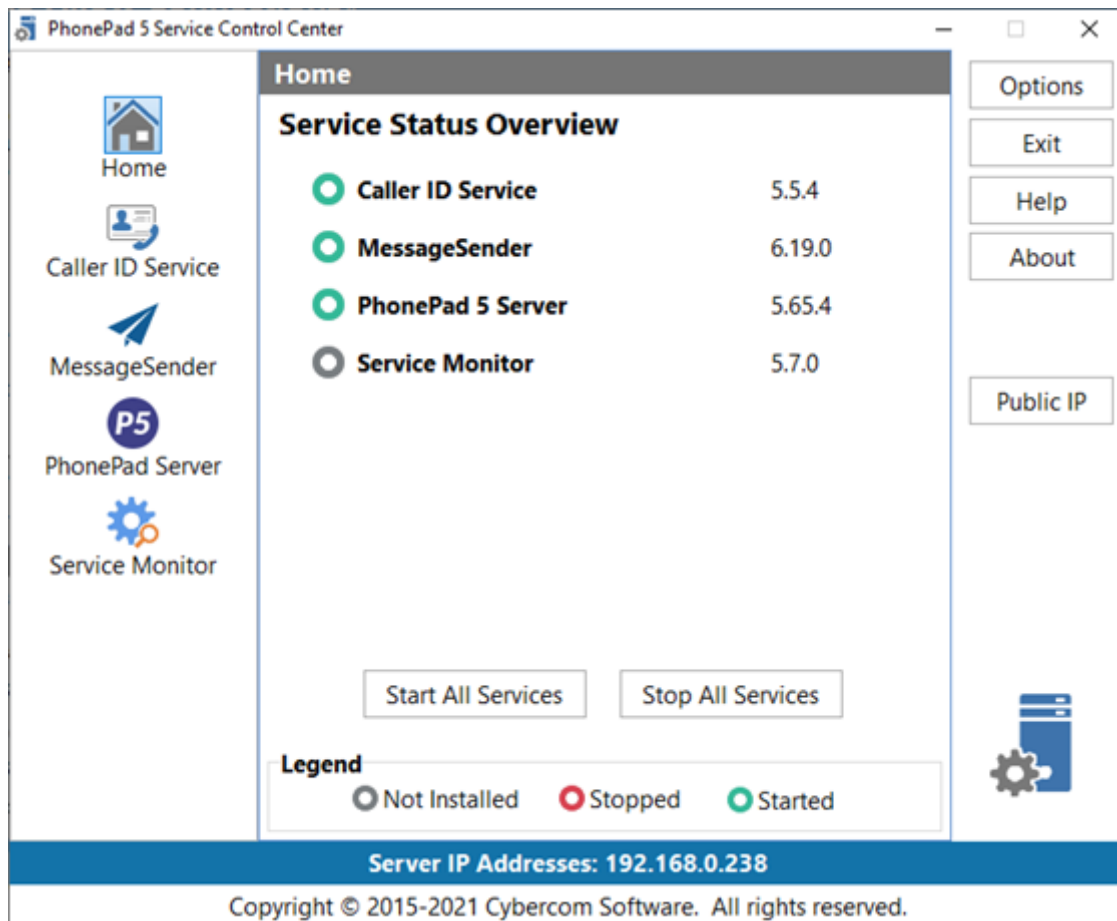


Managing the MessageSender Service

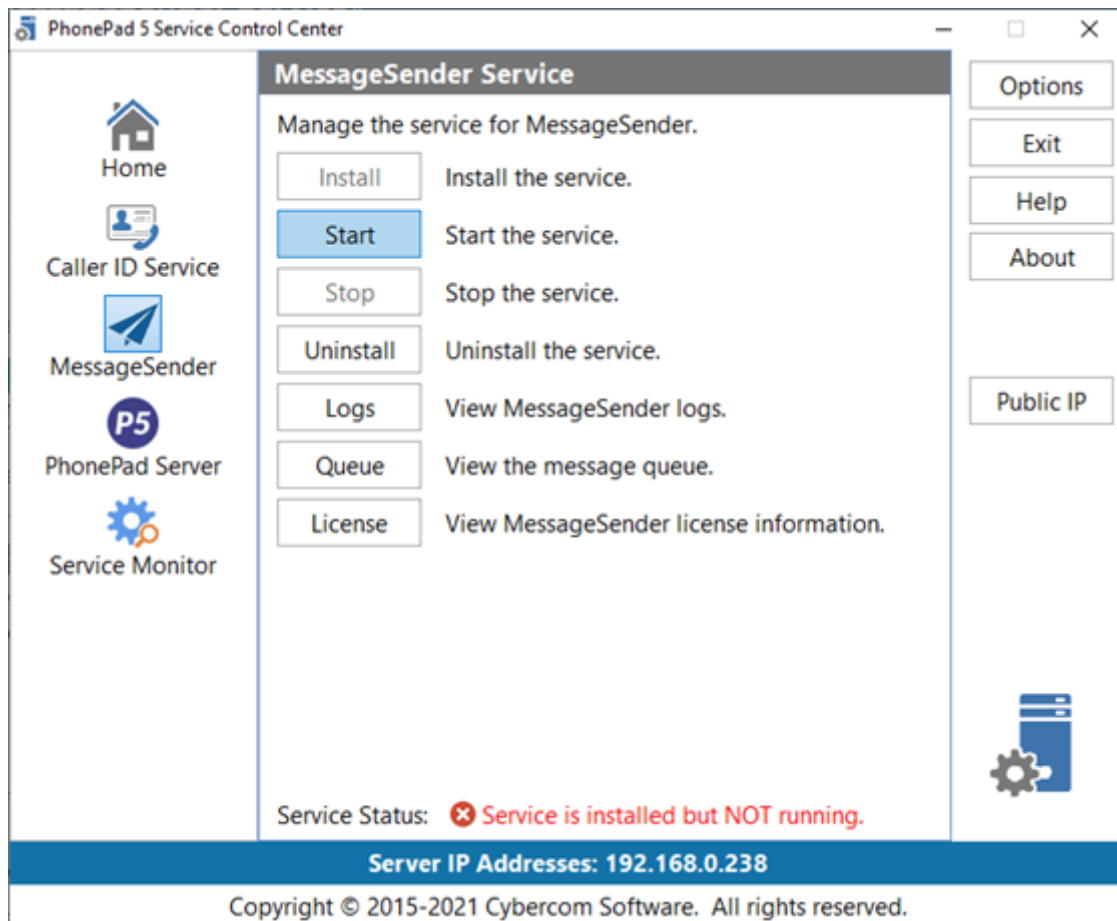
Installing and Starting the MessageSender Service

After installing MessageSender it should start automatically. You can check this by opening Control Center and checking the status of MessageSender.

1. Open Control Center.



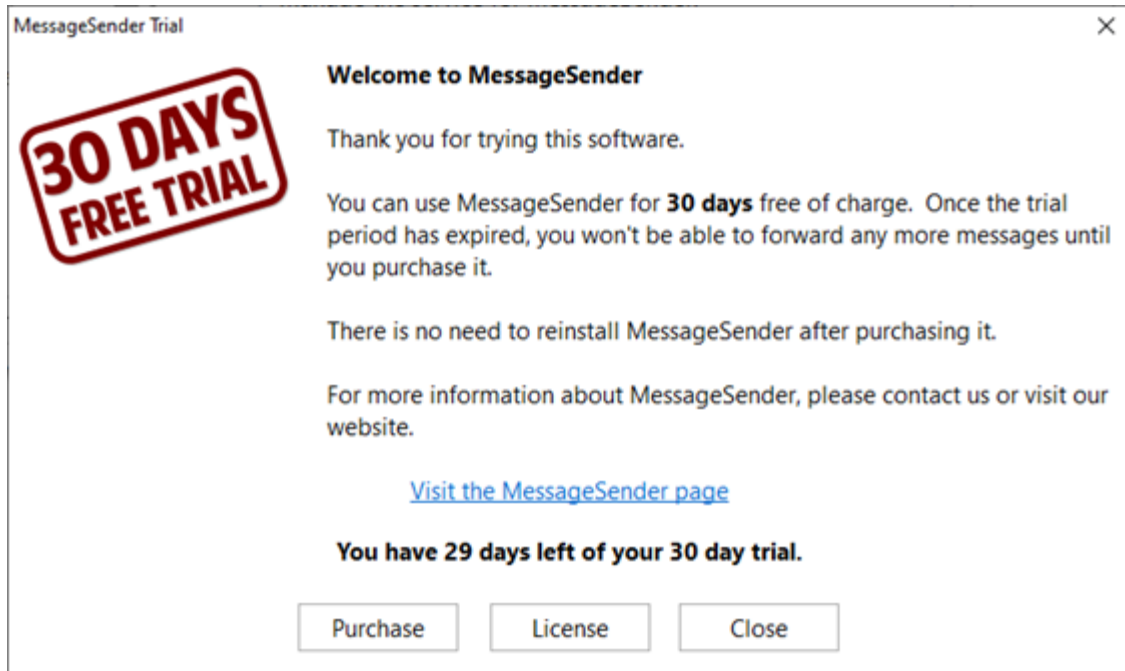
2. If the MessageSender status icon is red, select **MessageSender**.



3. Click the **Start** button.

MessageSender Trial Period

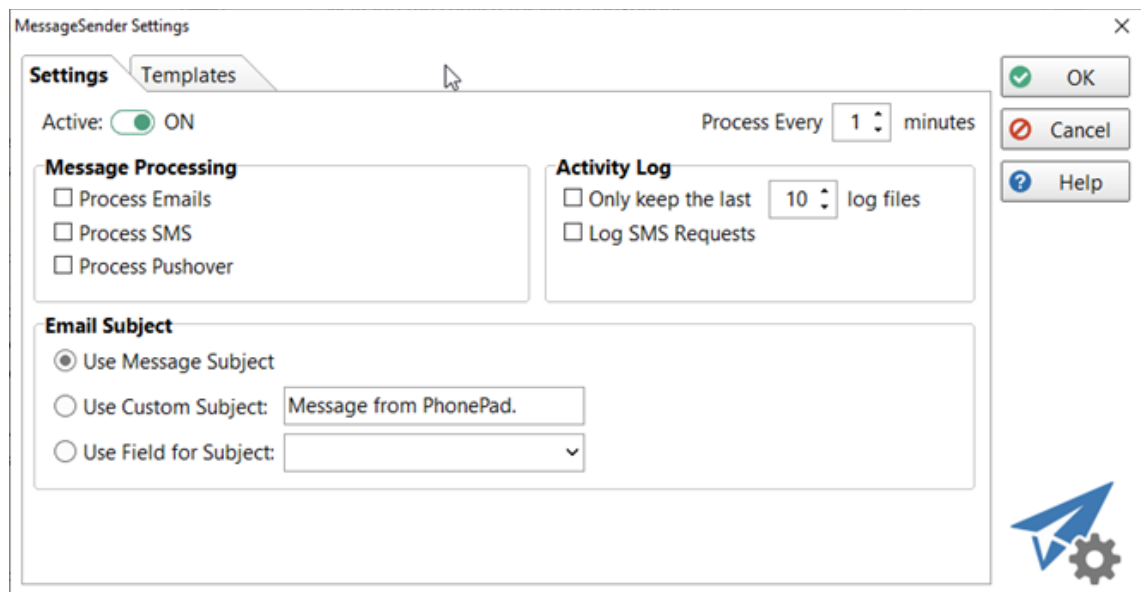
Under **MessageSender** in Control Center, you can check your trial period by clicking the **License** button.



Setting Up the MessageSender Service

There are a few settings you need to set to get things rolling. To do this, you will need to login to PhonePad using a user account that has System Admin access.

1. Select **MessageSender Settings** on the **System Admin** toolbar.



2. Select **Active** to make the MessageSender service active.
3. Select the type of processing you want the service to perform, ie. Process Emails, Process SMS and/or Process Pushover.
4. The final step is to set up your Communication Settings in PhonePad.

Message Processing	
Active	When set to ON, the MessageSender service will process messages in the message queue.
Process Emails	When checked, the MessageSender service will process messages that are queued to be sent via email.
Process SMS	When checked, the MessageSender service will process messages that are queued to be sent via SMS.
Process Pushover	When checked, the MessageSender service will process messages that are queued to be sent via Pushover.
Process Every x Minutes	Determines how frequently the MessageSender service should check for messages to process. The default is every 5 minutes.

Activity Log	
Detailed Activity Log	When checked, the activity log will display connection information, authentication responses, etc.
Only keep the last x log files	When checked, MessageSender will automatically delete older activity log files. You can specify the number of activity logs to retain.
Log SMS Requests	When checked, provides more detailed information about SMS message sending.

Email Subject	
Use Message Subject	When checked, the activity log will display connection information, authentication responses, etc.
Use Custom Subject	When checked, MessageSender will automatically delete older activity log files. You can specify the number of activity logs to retain.

Use Field for Subject	When checked, provides more detailed information about SMS message sending.
------------------------------	---

Message Templates (2)

Under **System Tab/MessageSender Settings** in PhonePad, select the **Templates** tab.

The screenshot shows the 'MessageSender Settings' dialog box with the 'Templates' tab selected. The dialog has a title bar with a close button (X). Inside, there are two tabs: 'Settings' and 'Templates'. The 'Templates' tab is active, showing instructions: 'Edit the existing templates used by MessageSender, or create your own from scratch.' Below this, there are three sections: 'Email Templates', 'SMS Message Templates', and 'Pushover Message Templates'. Each section contains two rows: 'Phone Message Template' and 'Text Message Template', each with a drop-down menu and a 'Template Editor' icon (a document with a pencil). The default templates are 'Email Phone Message Template', 'Email Text Message Template', 'SMS Phone Message Template', 'SMS Text Message Template', 'Pushover Phone Message Template', and 'Pushover Text Message Template'. On the right side of the dialog, there are three buttons: 'OK' (with a green checkmark), 'Cancel' (with a red X), and 'Help' (with a question mark). At the bottom right, there is a blue paper plane icon with a gear inside it.


MessageSender comes with default templates for each of the message types. These template determine the type of information included in the forwarded messages as well as the format.


The default message templates should also be selected, but you can select them using the drop-down list if they're not. You can use these as is, modify them, or create your own.

Email Templates (2)

MessageSender Manager includes a built-in editor for creating and editing email message templates. To open the editor, click on the **Template Editor** button.

Email Templates

Phone Message Template: 

Text Message Template: 

The Template Editor will be displayed. If a message template was specified in the message template field then the Template Editor will automatically open the template for editing. You have a number of choices:

- Edit the template and save it, overwriting the existing one (use **Save**).
- Edit the template and save it as a new template (use **Save As**).
- Create a new template from scratch by clicking the **New** button.

Template Editor - C:\ProgramData\Cybercom Software\MessageSender6\EmailPhoneMessageTemplate.template

New Open Save Save As Close Help

```

<messagetitle>
To:      <recipients>
Date:    <date>
Time:    <time>
Caller:  <caller>
Company: <company>
Phone:   <phone>
Urgent:  <urgent>
Subject: <subject>
-----
<phoned> <phonedlabel>
<returnedcall> <returnedcalllabel>
<cametoseeyou> <cametoseeyoulabel>
-----
<noaction> <noactionlabel>
<pleasephone> <pleasephonelabel>
<willphoneagain> <willphoneagainlabel>
<willdropby> <willdropbylabel>
<wantstoseeyou> <wantstoseeyoulabel>
<willbeinat> <willbeinatlabel>: <willbeinattext>
-----
Message:
  
```

Message Type: Phone Message Template Tags: <callaction> Insert

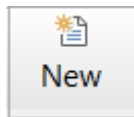
A message template is made up of static text and tags (indicated with <>). For example, in the above screenshot "To:" is static text while "<recipients>" is a tag. When a message is processed, the tags are replaced with actual data from PhonePad messages, while the static text is ignored.

In the same screenshot you can see one of the default email message templates that is included with MessageSender. Virtually every tag is used in this example. To modify the template, simply change or remove the static text and tags you don't want.

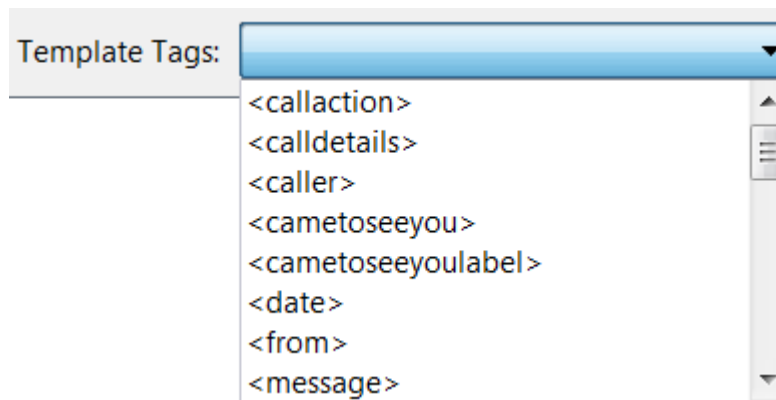
The **Message Type** drop-down list is used to indicate the type of messages the template is to be used for. Tags can be inserted by selecting them from the **Template Tags** drop-down list and then clicking the **Insert** button.

Creating a New Template

1. To create a new message template, click on the **New** button on the toolbar.



2. You can add any static text you want to the message area and format it in any way you desire.
3. To add message tags, position the cursor in the message area where you want the relevant message data to appear. Next, select the appropriate tag from the **Template Tags** drop-down list, and click the **Insert** button.

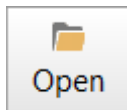


You can save the template by clicking the **Save** button. You will be prompted for a filename.

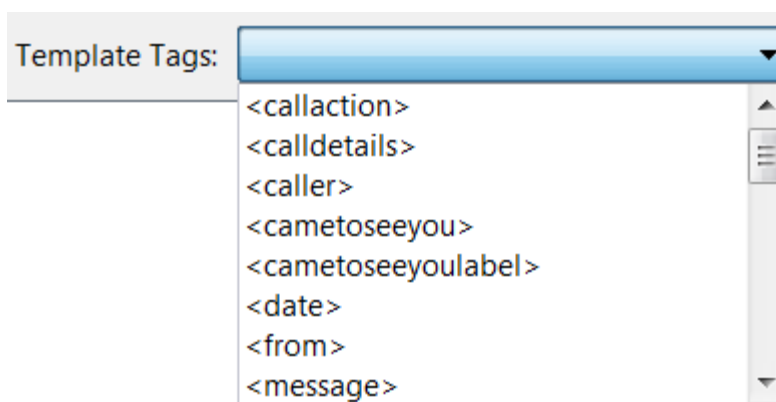


Editing an Existing Template

1. If a message template was specified in the message template field then the Template Editor will automatically open the template for editing. You can edit this template or open another template by clicking the **Open** button.



2. Editing a template is the same as creating a new template. You can add any static text you want to the message area and format it in any way you desire.
3. To add message tags, position the cursor in the message area where you want the relevant message data to appear. Next, select the appropriate tag from the **Template Tags** drop-down list, and click the **Insert** button.





4. To save your changes, click the **Save** button.



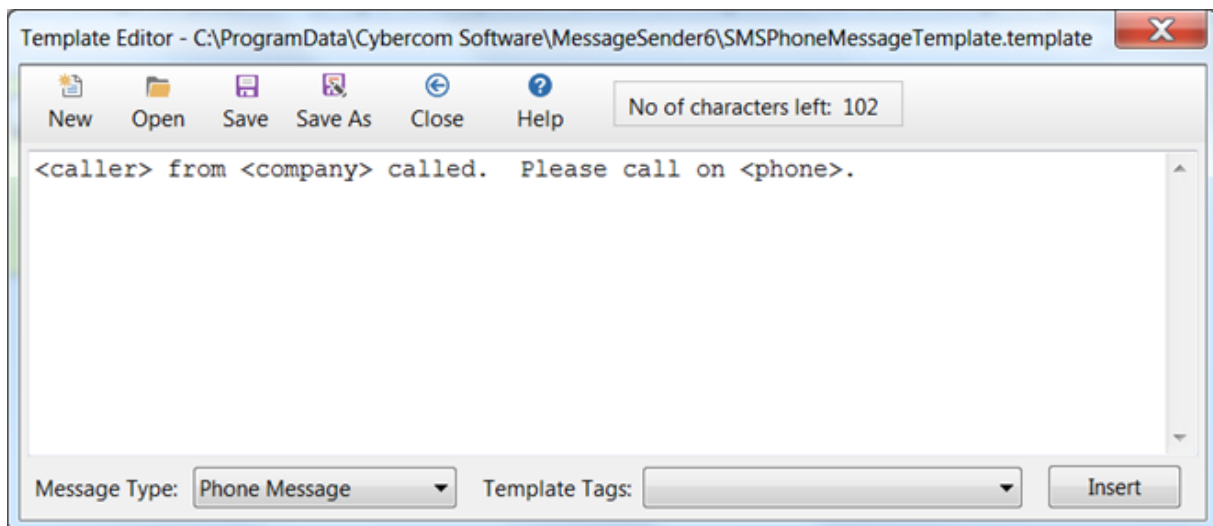
SMS Templates (2)

Email Templates_2MessageSender Manager includes a built-in editor for creating and editing SMS message templates. To open the editor, click on the **Template Editor** button.

SMS Message Templates	
Phone Message Template:	<div>SMS Phone Message Template </div>
Text Message Template:	<div>SMS Text Message Template </div>

The Template Editor will be displayed. If a message template was specified in the message template field then the Template Editor will automatically open the template for editing. You have a number of choices:

- Edit the template and save it, overwriting the existing one (use **Save**).
- Edit the template and save it as a new template (use **Save As**).
- Create a new template from scratch by clicking the **New** button.

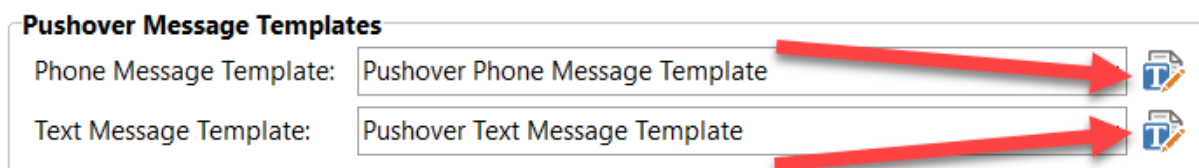


SMS templates tend to be a lot shorter than email templates due to SMS character limits. SMS templates have a limit of 160 characters. It's recommended to keep them shorter than this though as the data that replaces the tags may be longer than the length of the tags.

Refer to the section on Email Templates for instructions on creating and editing templates.

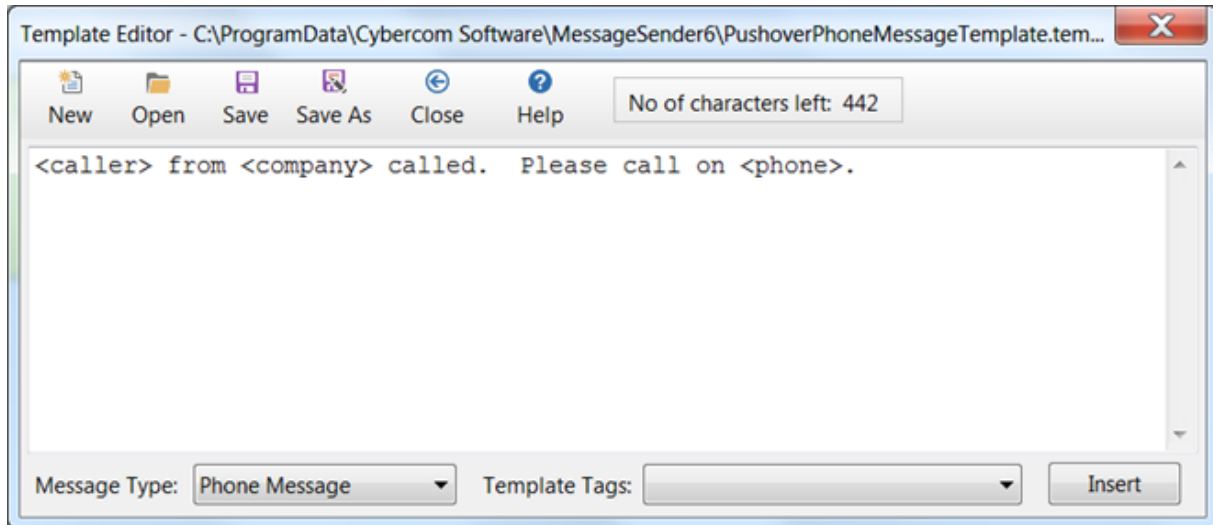
Pushover Templates (2)

MessageSender Manager includes a built-in editor for creating and editing Pushover message templates. To open the editor, click on the **Template Editor** button.



The Template Editor will be displayed. If a message template was specified in the message template field then the Template Editor will automatically open the template for editing. You have a number of choices:

- Edit the template and save it, overwriting the existing one (use **Save**).
- Edit the template and save it as a new template (use **Save As**).
- Create a new template from scratch by clicking the **New** button.



Pushover templates tend to be a lot shorter than email templates, but not as short as SMS templates. Pushover templates have a limit of 498 characters. It's recommended to keep them shorter than this though as the data that replaces the tags may be longer than the length of the tags.

Refer to the section on Email Templates for instructions on creating and editing templates.

Template Tags (2)

The Template Tags that are available for creating and editing message templates are dependant on the type of message selected.

Phone Messages	
<caller>	Name of the person calling.
<cametoseeyou>	Displays an [X] if this is true.
<cametoseeyoulabel	Displays "Came to See You" unless you have changed it using the LabelEditor utility.

<calldetails>	This will be either "Phoned", "Returned Your Call" or "Came to See You". If you have changed the message labels then those labels will be displayed instead.
<callaction>	This will be either "No Action Required", "Please Phone", "Will Phone Again", "Will Drop By Again", "Wants to See You" or "Will Be In At". If you have changed the message labels then those labels will be displayed instead.
<date>	Date of the message.
<from>	The caller's organization.
<message>	The actual text of the message.
<messagetitle>	By default this is "While You Were Out", unless you have changed it using the LabelEditor utility.
<noaction>	Displays an [X] if this is true.
<noactionlabel>	Displays "Came to See You" unless you have changed it using the LabelEditor utility.
<phone>	The caller's phone number.
<phoned>	Displays an [X] if this is true.
<phonedlabel>	Displays "Came to See You" unless you have changed it using the LabelEditor utility.
<pleasephone>	Displays an [X] if this is true.
<pleasephonelabel>	Displays "Came to See You" unless you have changed it using the LabelEditor utility.
<recipients>	Lists all users the message was sent to.
<returnedcall>	Displays an [X] if this is true.
<returnedcalllabel>	Displays "Came to See You" unless you have changed it using the LabelEditor utility.
<sender>	The person who recorded the message.
<subject>	The subject of the message.
<time>	Time of the message.
<urgent>	Indicates whether the message is urgent or not.
<wantstoseeyou>	Displays an [X] if this is true.

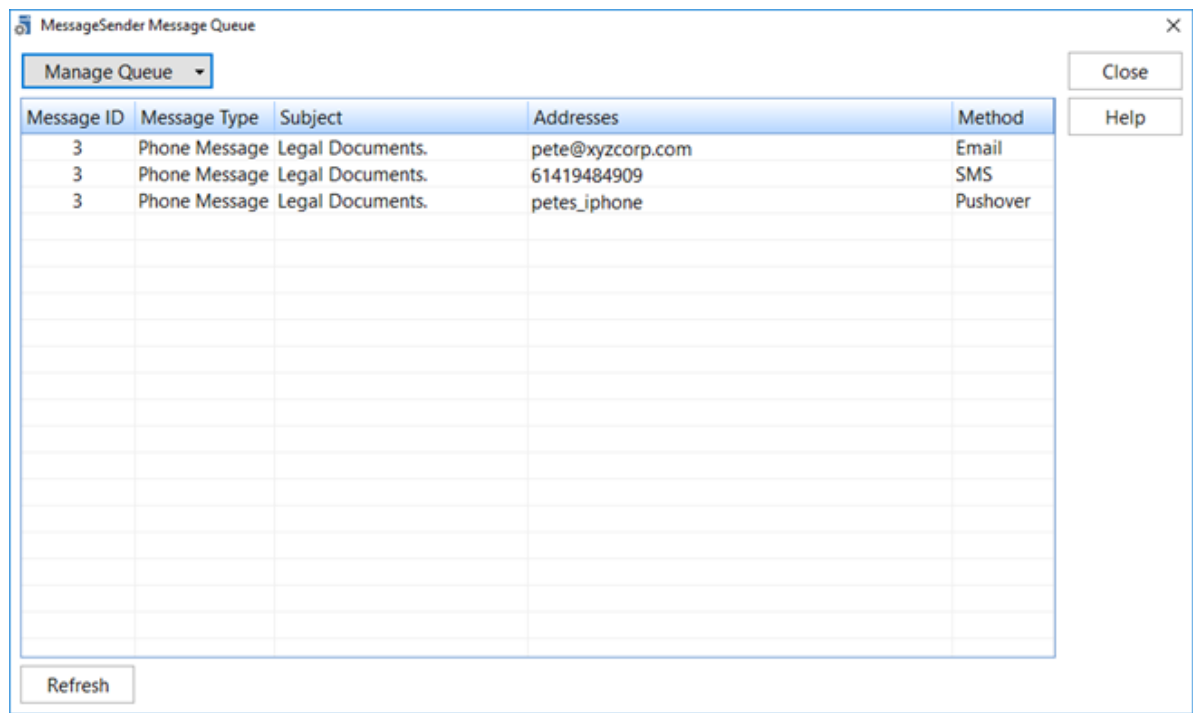
<wantstoseeyou label>	Displays "Came to See You" unless you have changed it using the LabelEditor utility.
<willbeinat>	Displays an [X] if this is true.
<willbeinatlabel >	Displays "Came to See You" unless you have changed it using the LabelEditor utility.
<willbeinattext >	The time the user will be in.
<willdropby>	Displays an [X] if this is true.
<willdropbylabel>	Displays "Came to See You" unless you have changed it using the LabelEditor utility.
<willphoneagain >	Displays an [X] if this is true.
<willphoneagain label>	Displays "Came to See You" unless you have changed it using the LabelEditor utility.

Text Messages	
<date>	Date of the message.
<message>	The actual text of the message.
<recipients>	Lists all users the message was sent to.
<sender>	The person who recorded the message.
<subject>	The subject of the message.
<time>	Time of the message.
<urgent>	Indicates whether the message is urgent or not.

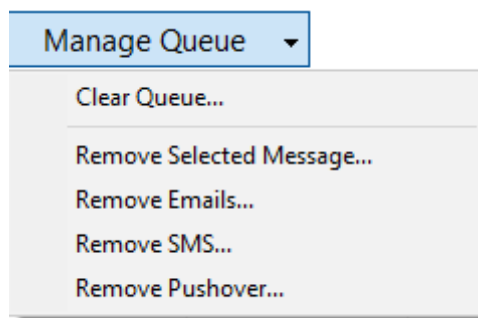
Managing the MessageSender Queue

You can view and manage the MessageSender queue from within PhonePad, if you are a system administrator.

1. Click the **MessageSender Queue** button on the **System Admin** toolbar, or select **MessageSender Message Queue** from the **System Admin** menu.
2. The **Message Queue** will display all messages waiting to be processed by the MessageSender service.



3. The **Manage Queue** button features a drop-down menu that allows you to manage the messages in the queue.



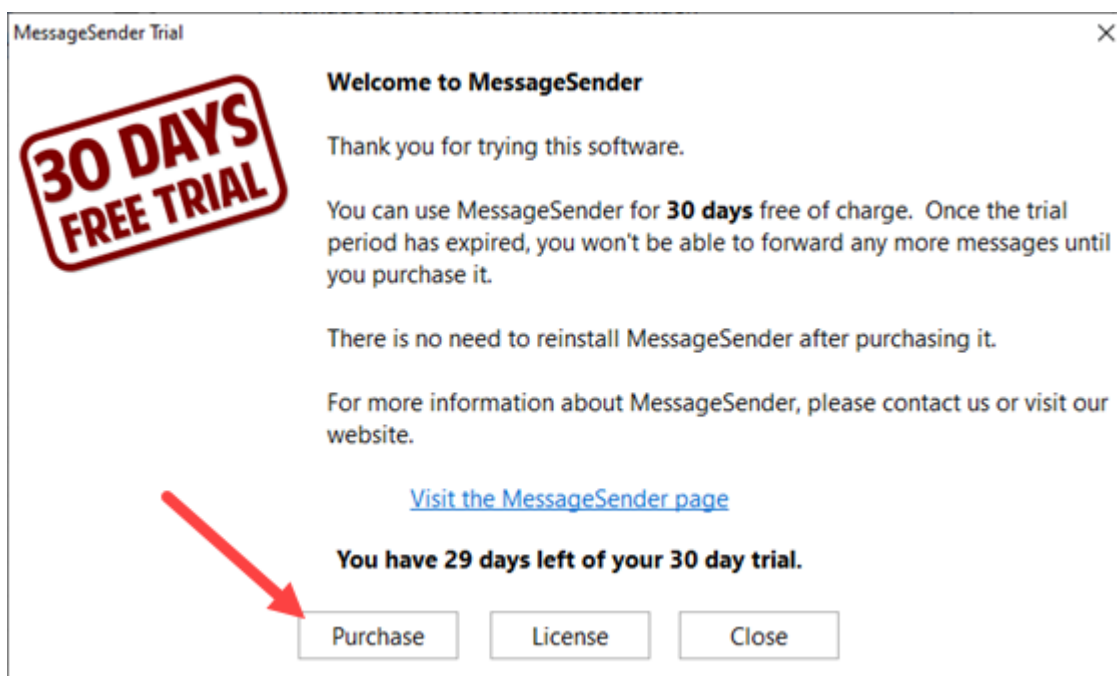
4. The **Refresh** button will update the message queue by reloading it.

Clear Queue	Clears all messages from the queue. Any messages cleared will not be sent.
Remove Selected Message	Deletes the selected message.

Remove Emails	Clears all email messages from the queue.
Remove SMS	Clears all SMS messages from the queue.
Remove Pushover	Clears all Pushover messages from the queue.

Purchasing MessageSender 6

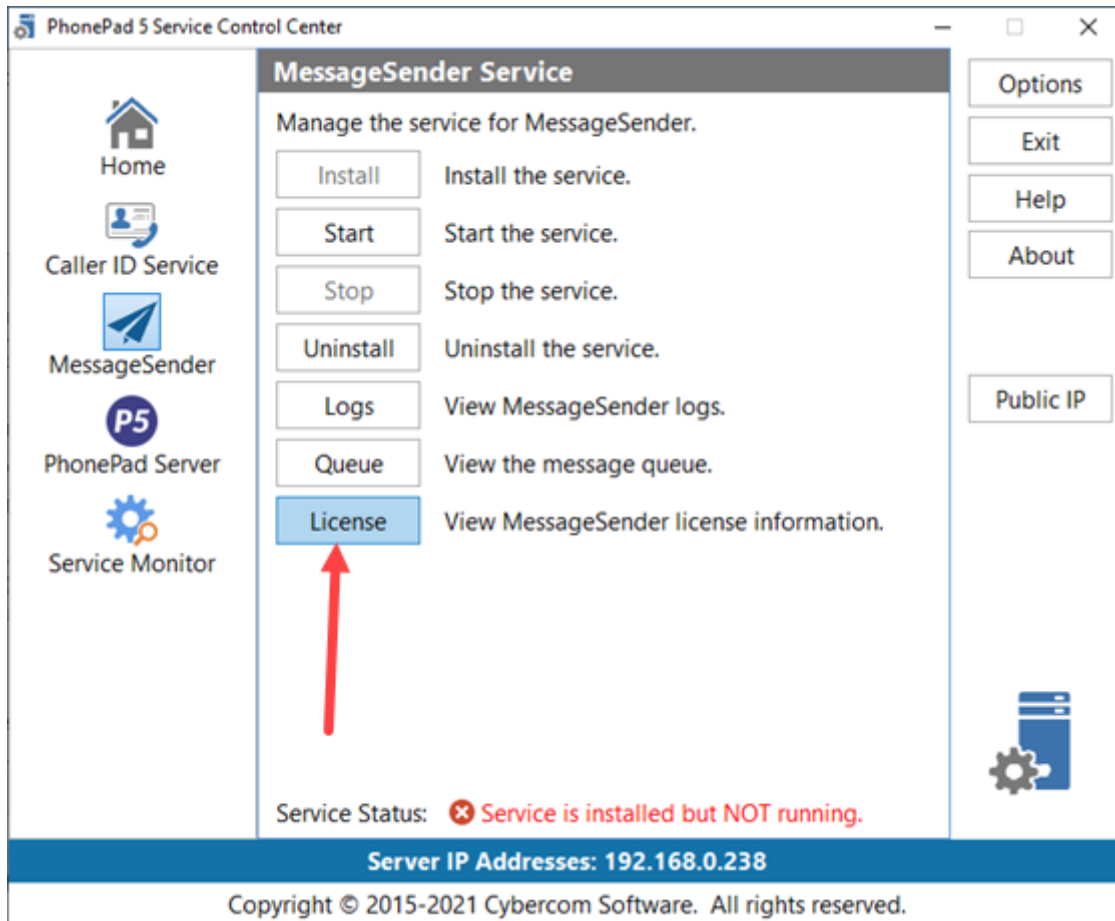
You can purchase MessageSender online by visiting the Buy Now page on our website. Or you can click on the **Purchase** button on the **MessageSender Trial** screen in Control Center.



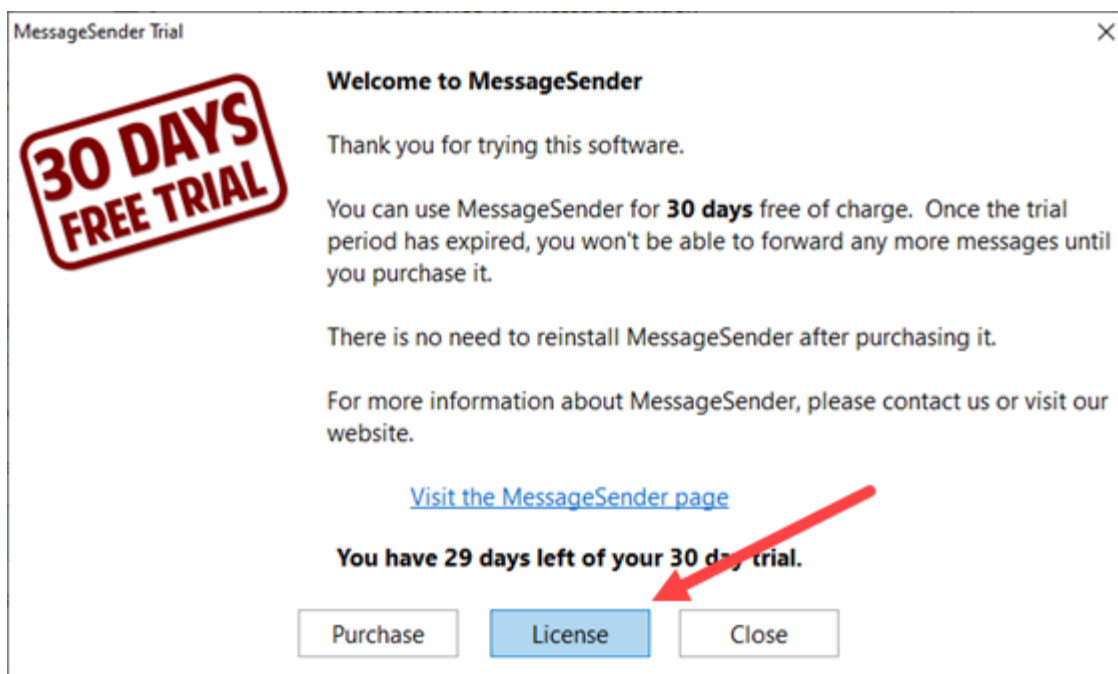
Licensing MessageSender 6

When you purchase MessageSender you will receive your license details by email. You can license MessageSender by following these steps:

1. Open Control Center.
2. Select **MessageSender**.
3. Click the **License** button



4. Click the **License** button



5. Enter your license details, then click the **Activate License** button.

A screenshot of a "License MessageSender" dialog box. It contains an icon of a computer and a globe. The text says: "Enter your license details and click the Activate License button. MessengerSender connects to the license server via the Internet so you may be prompted by your firewall to allow the connection." Below this are three input fields: "Client Number:" with "12345678", "Email Address:" with "john@fluffyrabbitcorp.com", and "Serial Number:" with "MS-12345678". At the bottom is an "Activate License" button.

MessageSender will connect to the license server over the Internet and download your license and install it. A message should be displayed once this has been completed.

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Chapter

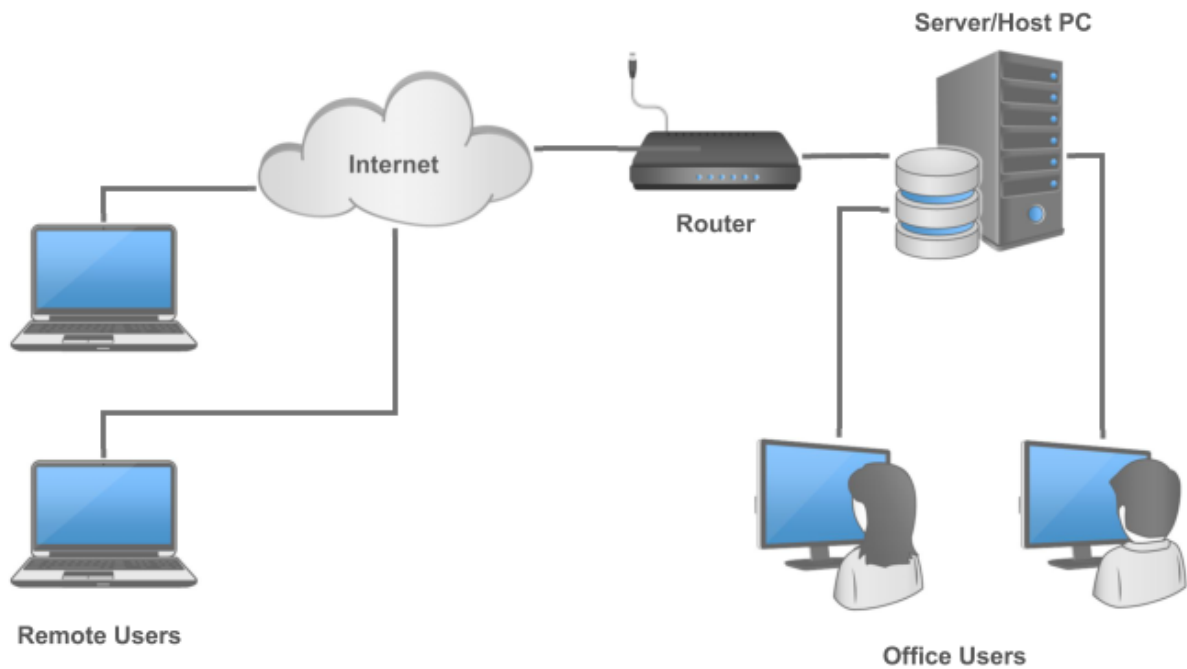


8

**Remote Connections Over the
Internet**

Remote Connections Over the Internet

If you have users that work from home, are on the road, or otherwise need to access their phone messages when not in the office then PhonePad's remote connection functionality can help with that.



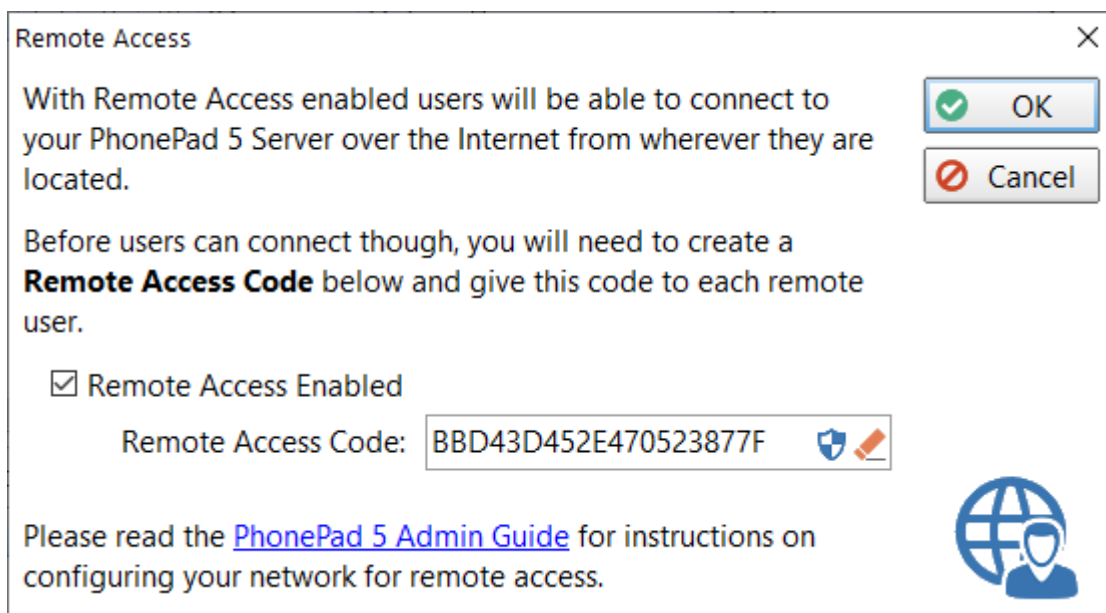
When you install PhonePad 5 Workstation it also installs **PhonePad 5 Remote**. Once set up, users can use PhonePad Remote to login to PhonePad from their desktop or laptop computers no matter where they are in the world as long as they have an Internet connection.




1. Enabling Remote Connections

Enabling remote access is simple:

1. Click on the **Remote Access** button on the **System Admin** toolbar, or select **Remote Access** from the **System Admin** menu.
2. Check the **Remote Access Enabled** check box.
3. Click the "shield" button in the **Remote Access Code** field to create a Remote Access Code. The Remote Access Code will be automatically copied to the Windows clipboard
4. Click **OK** to save the settings.



Give the Remote Access Code to users that will be logging in remotely.

 If you create a new Remote Access Code, any previous Remote Access Code will become invalid. Any users trying to remote connect with the previous Remote Access Code will no longer be able to login until you give them the new code.

2. Configuring Your Router to Allow Connections

Setting up your router to allow remote connections is the **critical** part of this exercise. If you don't get this done then none of the rest will work.

Unfortunately we can only give you generic instructions as every router does things differently. It's impossible for us to know how to do this on every router/modem on the market, nor can we automate this.

Although we may be able to help in a general way, you may need your IT support company to do the router/modem configuration for you as they are more likely to have a working knowledge of your router/modem than we have.

Before you get started you will need the following information:

1. The IP Address of your Server or Host PC.
2. How to connect to your router/modem using your web browser. Typically the IP Address is 192.168.0.1 or 10.1.10.1, although it could be something else entirely.
3. The username and password to login to your router/modem.

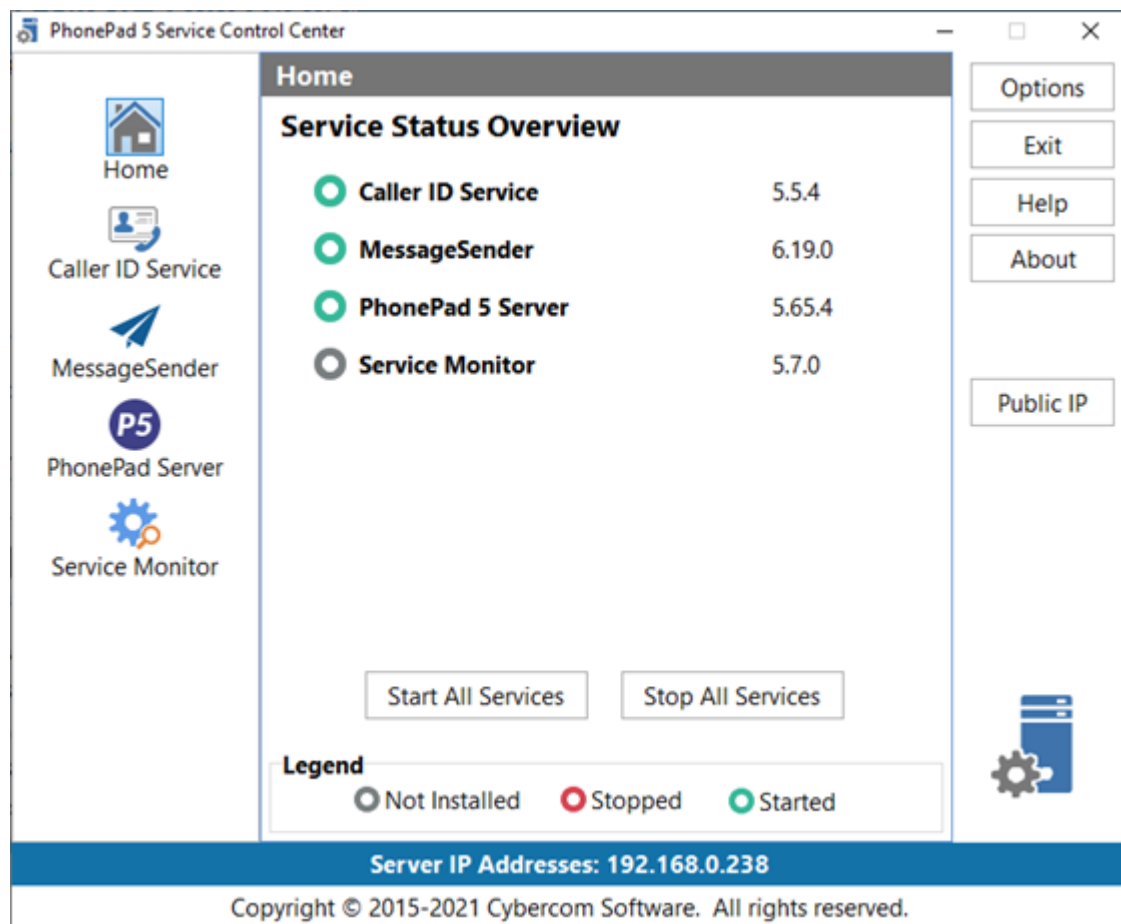
4. How to configure its firewall.
5. How to configure port forwarding.

The two things that need to be done are:

1. Create a router **firewall rule** that opens port 12600 to traffic from the Internet.
2. Set up **port forwarding** on your router to forward port 12600 to the IP Address of your Server or Host PC.



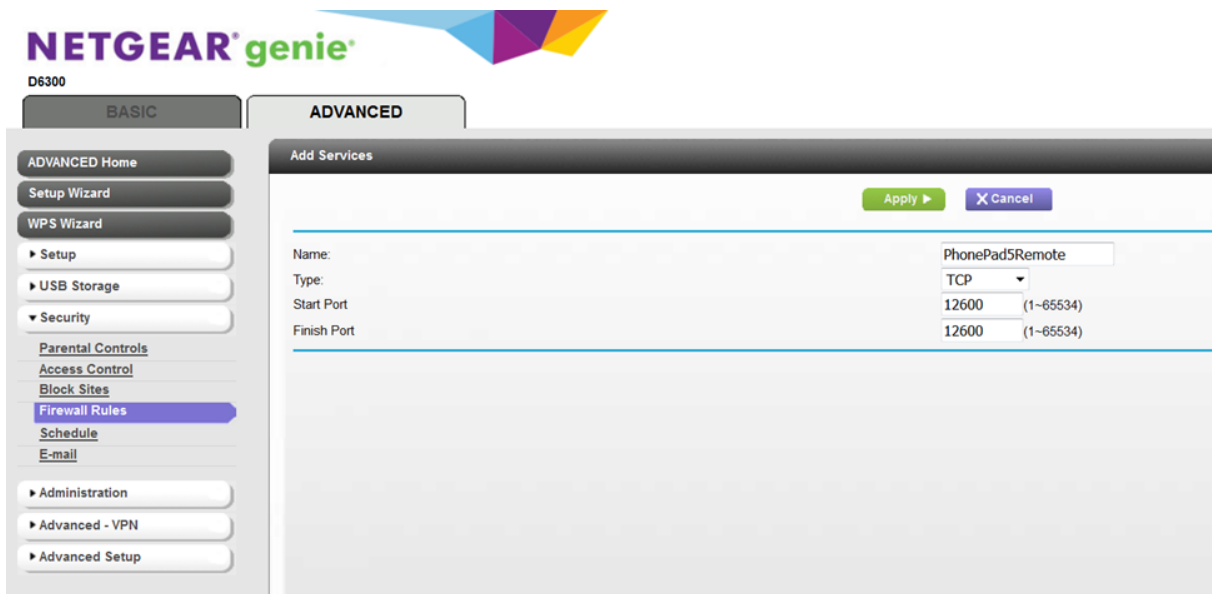
If you don't know the IP Address of your Server or Host PC, just go to that machine and run **Control Center**. It will show the IP Address you need.



2a. Opening a Firewall Port

The first thing to do is open port 12600 in your router's firewall. This allows PhonePad Remote to connect to the router using that port.

On our Netgear router this is done by adding a "service". Although we named the service "PhonePad5Remote" you can usually use any name you like. The important parts are the type, which is TCP, and the port, which is 12600.

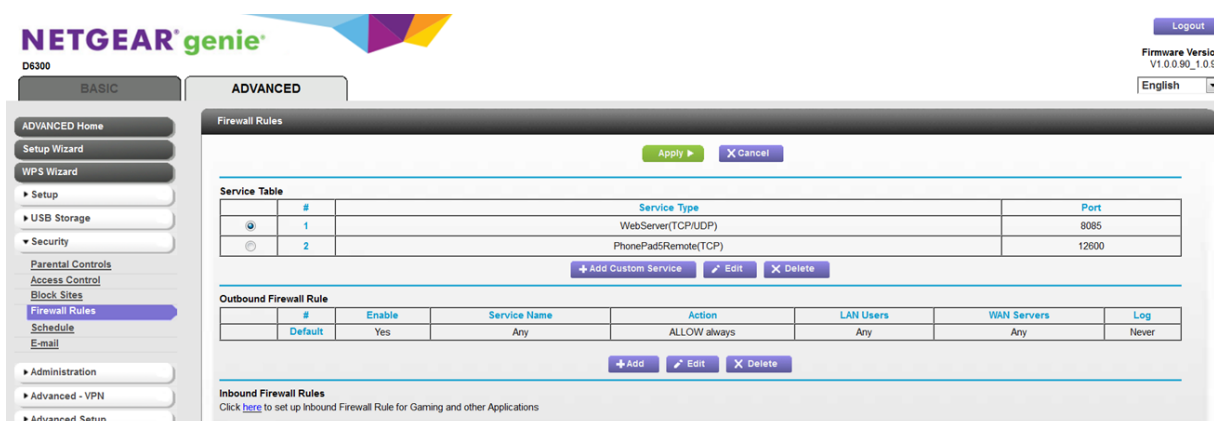


The screenshot shows the Netgear Genie D6300 Advanced Setup interface. The left sidebar contains navigation options: ADVANCED Home, Setup Wizard, WPS Wizard, Setup, USB Storage, Security, Parental Controls, Access Control, Block Sites, Firewall Rules (highlighted), Schedule, E-mail, Administration, Advanced - VPN, and Advanced Setup. The main area is titled "Add Services" and contains a form with the following fields:

Name:	PhonePad5Remote
Type:	TCP
Start Port:	12600 (1-65534)
Finish Port:	12600 (1-65534)

Buttons for "Apply" and "Cancel" are located at the top right of the form.

This is how it looks on our router once it has been added:



The screenshot shows the Netgear Genie D6300 Advanced Setup interface with the "Firewall Rules" section selected. The left sidebar is the same as in the previous screenshot. The main area displays the "Firewall Rules" configuration. At the top right, there are links for "Logout", "Firmware Version V1.0.0.90_1.0.9", and "English".

The "Service Table" lists the following services:

#	Service Type	Port
1	WebServer(TCP/UDP)	8085
2	PhonePad5Remote(TCP)	12600

Buttons for "Add Custom Service", "Edit", and "Delete" are located below the table.

The "Outbound Firewall Rule" section shows a single rule:

#	Enable	Service Name	Action	LAN Users	WAN Servers	Log
Default	Yes	Any	ALLOW always	Any	Any	Never

Buttons for "Add", "Edit", and "Delete" are located below the table.

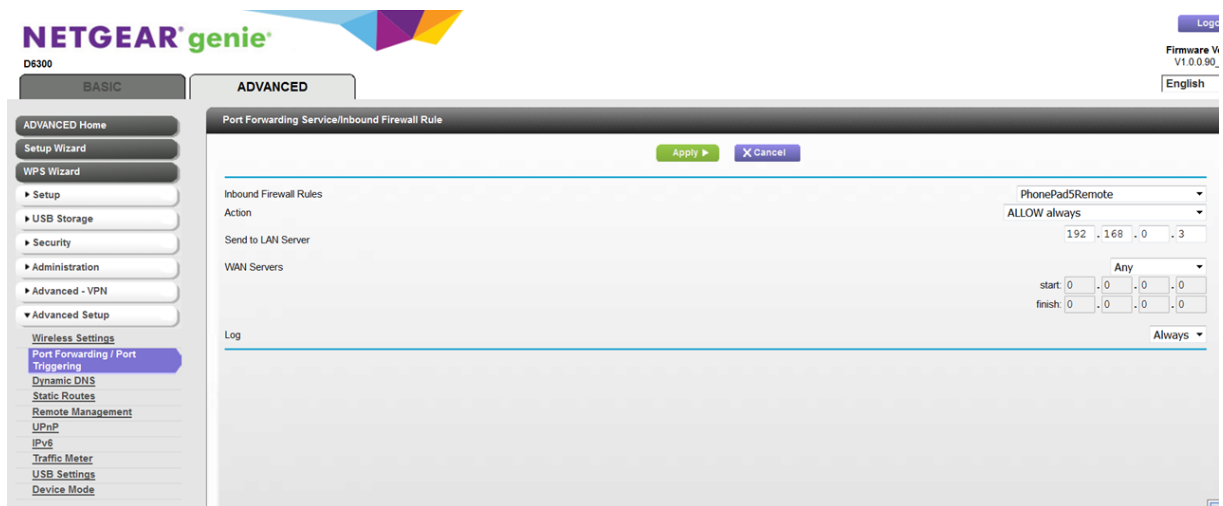
The "Inbound Firewall Rules" section has a link: "Click [here](#) to set up Inbound Firewall Rule for Gaming and other Applications".

2b. Setting Up Port Forwarding

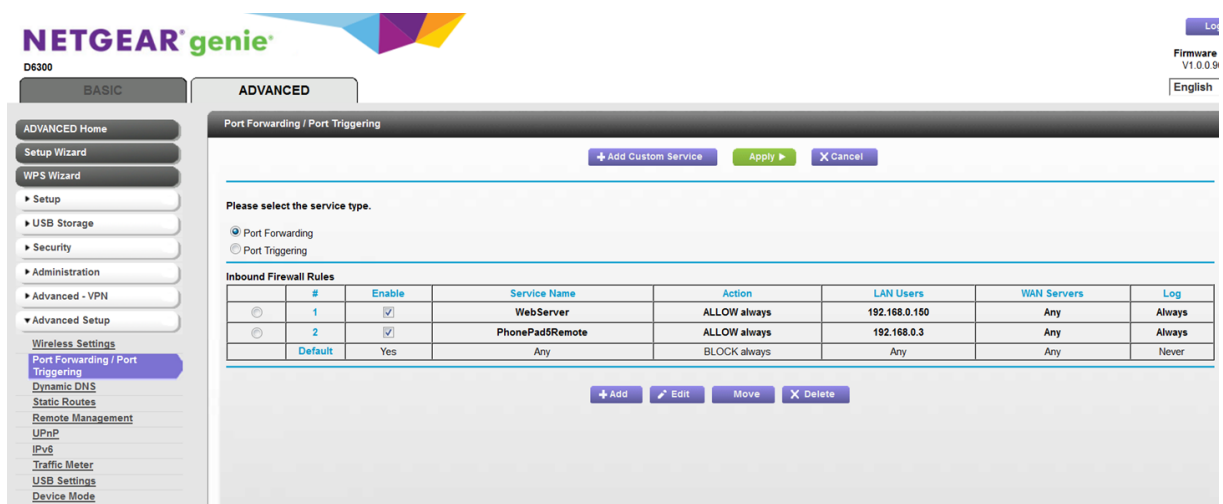
Now that PhonePad Remote can actually connect to port 12600 on the router, we need to forward the connection to the Server or Host PC that the PhonePad 5 Server is running on.

On our Netgear router this is done by adding a new **Port Forwarding Service** or **Inbound Firewall Rule**.

In this example we select the "service" we created earlier (PhonePad5Remote), set the **Action** to **Allow Always**, enter the **IP Address** of the Server or Host PC, and that's about it.



Once it's been added it looks something like this:



3. Setting a Static IP Address

If your PhonePad 5 Server is installed on a Server then it should already have a *static* IP Address. However, if it is installed on a Host PC then it probably has a *dynamic* IP Address.

For the Port Forwarding to work correctly, you may need to have a *static* IP Address on your Server or Host PC. Some routers will ignore port forwarding settings if they're not pointing to a static IP Address.

These instructions will take you through the process of setting this up on a Window 10 system.

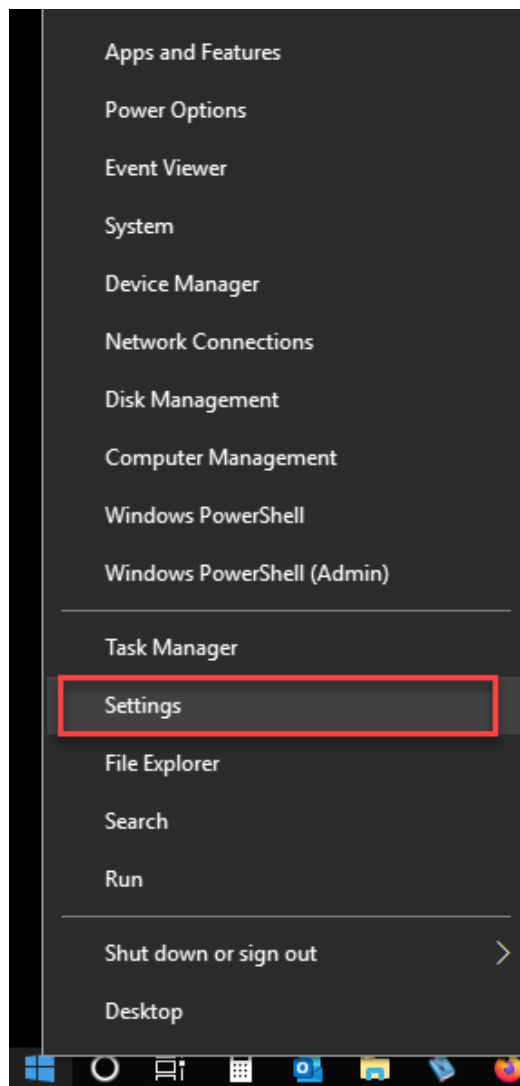
You need to know what you're doing with these steps. If you do the wrong thing, your Host PC could lose its ability to connect to your network and the Internet. These instructions are provided for information purposes only and we accept no responsibility if they don't work on your system.

Before you get started, you will need to know:

- Your router's IP Address.
- Your Host PC's IP Address.

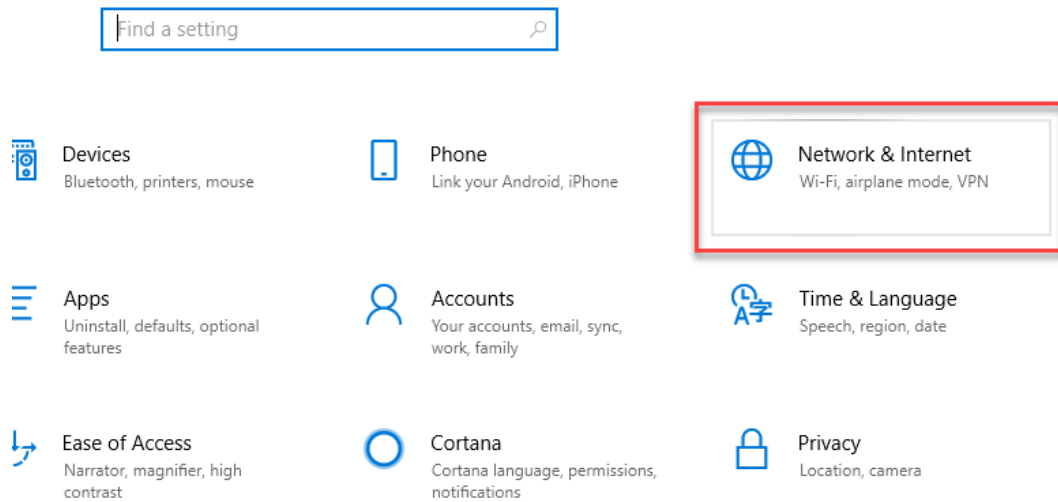
Ok, let's get started:

1. Right-click on the Windows icon on the taskbar and select **Settings**.

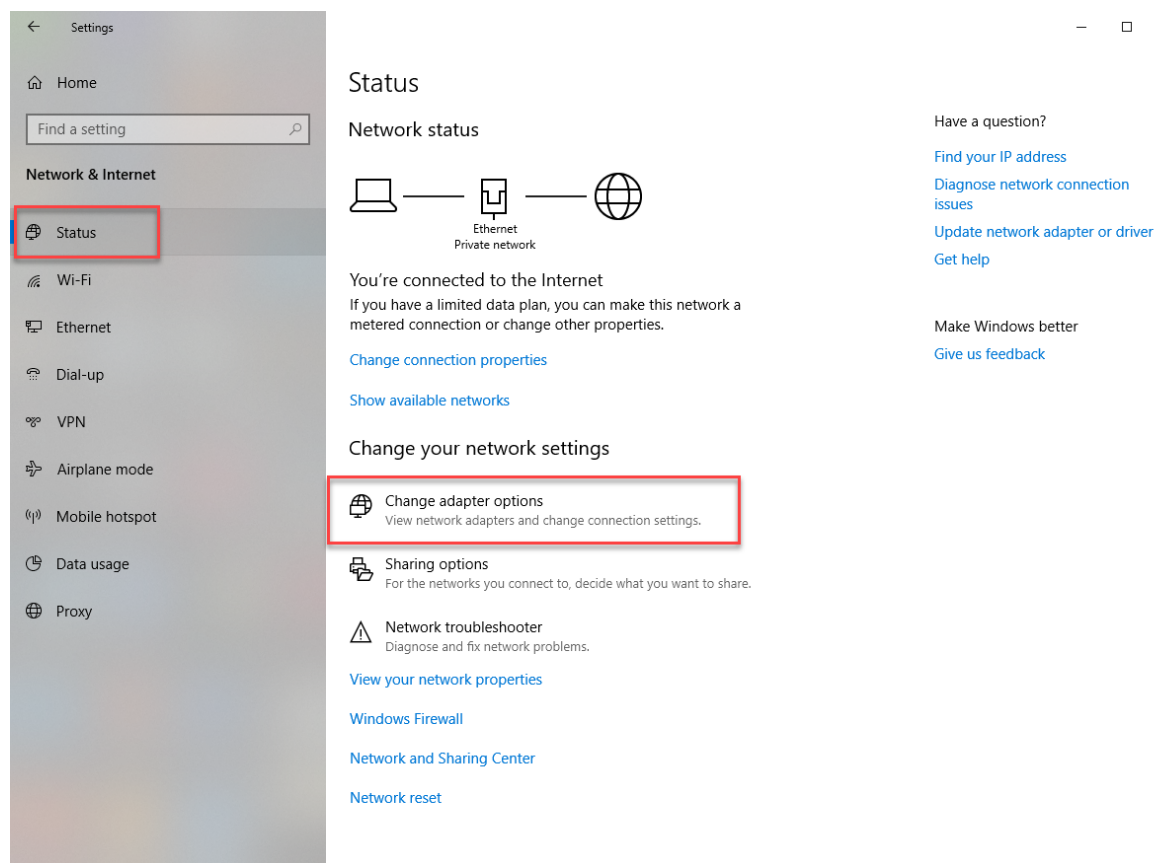


2. Select **Network & Internet**.

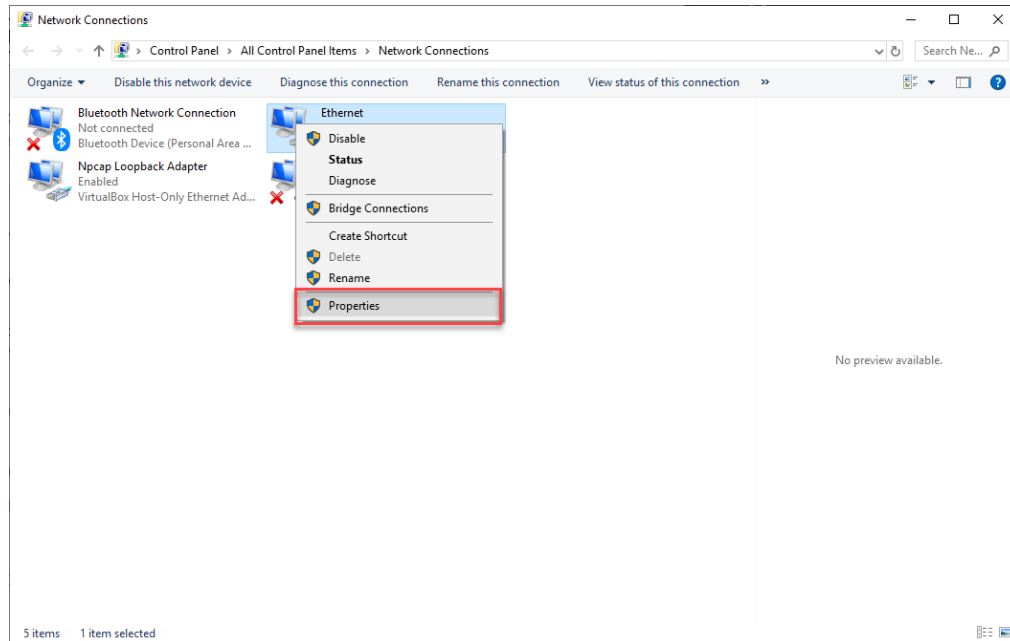
Windows Settings



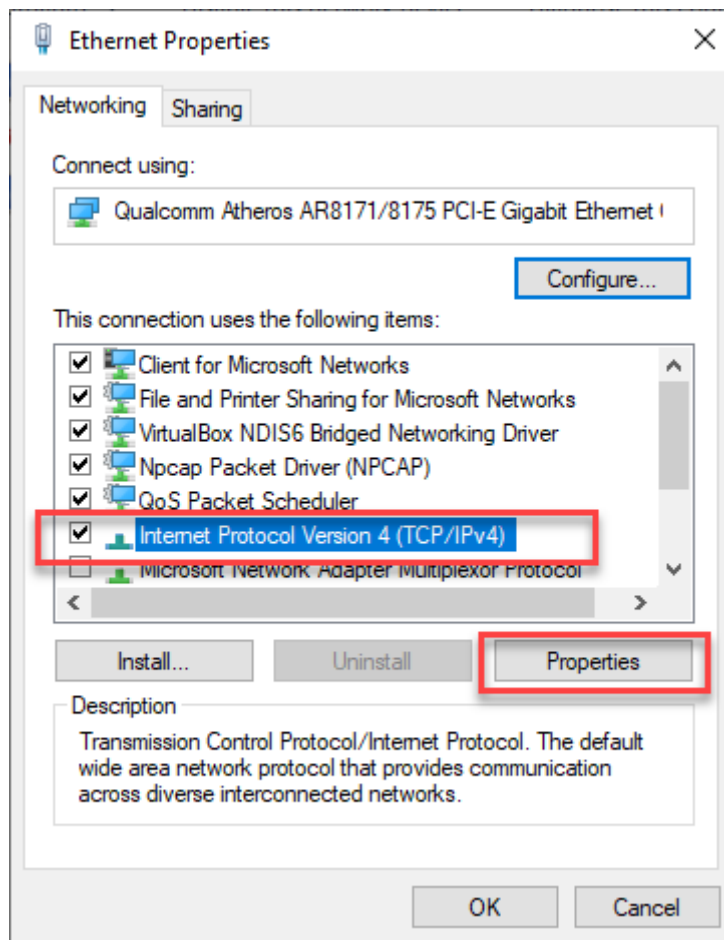
3. Select **Change Adapter Options**.



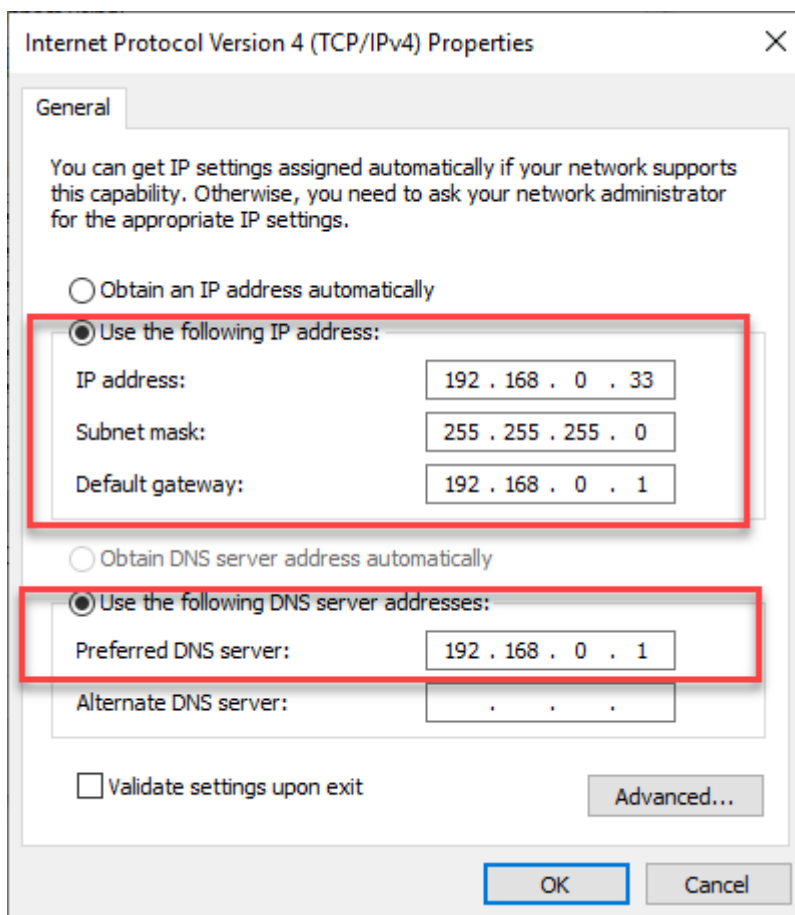
4. Right-click on your connection (usually Ethernet) and select **Properties** from the popup menu.



5. Select **Internet Protocol Version....**



6. Click the **Properties** button.
7. Enter your Host PC's IP Address under **IP Address**.
8. Enter your network's Subnet mask.
9. Enter your router's IP Address under **Default Gateway**.
10. Enter your router's IP Address under **Preferred DNS Server**.



Internet Protocol Version 4 (TCP/IPv4) Properties

General

You can get IP settings assigned automatically if your network supports this capability. Otherwise, you need to ask your network administrator for the appropriate IP settings.

☐ Obtain an IP address automatically

☒ Use the following IP address:

IP address: 192 . 168 . 0 . 33

Subnet mask: 255 . 255 . 255 . 0

Default gateway: 192 . 168 . 0 . 1

☐ Obtain DNS server address automatically

☒ Use the following DNS server addresses:

Preferred DNS server: 192 . 168 . 0 . 1

Alternate DNS server: . . .

☐ Validate settings upon exit

Advanced...

OK Cancel

11. Click OK.

12. Click OK.

4. Installing PhonePad Remote

PhonePad Remote is included in the install for PhonePad 5 Workstation, so each user will need to download and install PhonePad 5 Workstation on their remote PC.



PhonePad Remote users will need an active Internet connection on their remote computer to use PhonePad.

5. Using PhonePad Remote

Instead of running PhonePad 5 like they normally would in the office, users instead need to run **PhonePad Remote**.

To use PhonePad Remote, all they need to do is enter the **Remote Access Code** provided to them by a PhonePad Administrator, and then click the **Connect** button. As the **Remote Access Code** is fairly long it's easier to just copy and paste it into the **Remote Access Code** field.



When the **Connect** button is clicked, PhonePad Remote will attempt to connect to the PhonePad 5 Server running on your Server or Host PC. If all goes well it will close itself and the PhonePad 5 login window will be displayed. From that point on they can use PhonePad 5 the same way they would use it in the office.



PhonePad Remote will only be as fast as the Internet connection. If users have a slow connection then they should avoid using any features in PhonePad 5 that may take a long time to execute.

6. Updating PhonePad Remote

There is no need to update PhonePad Remote as it will be automatically updated in the same way that PhonePad 5 is updated in your office. Whenever you install a PhonePad 5 server update on your Server or Host PC, workstation updates are automatically pushed out to all workstations. The same thing happens with PhonePad Remote.

Chapter

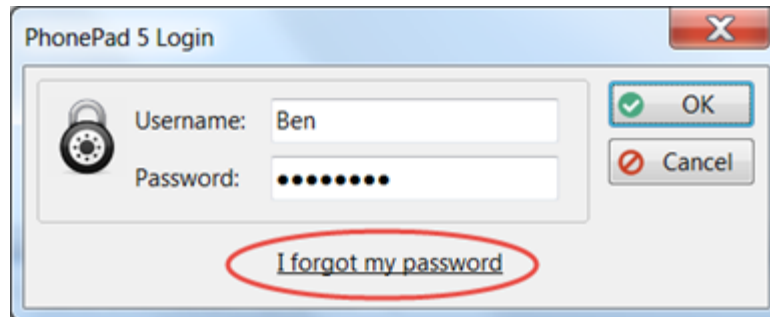
9

Forgotten Passwords

Forgotten Passwords

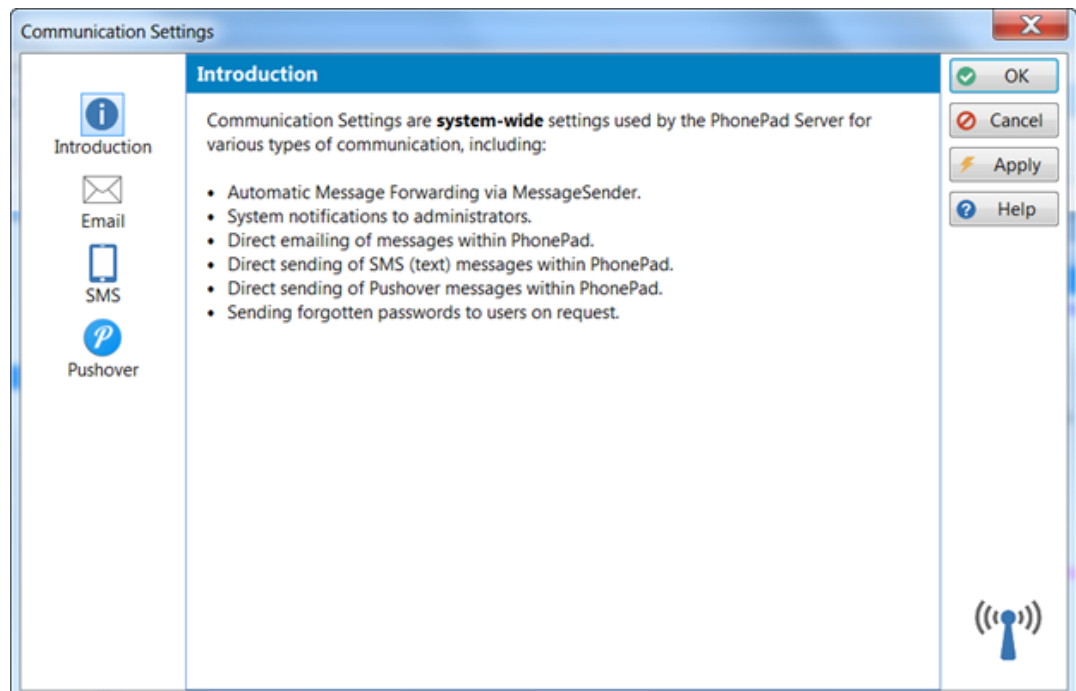
Mondays can often be a busy time for administrators. It's common for users to forget their PhonePad password over the weekend or if they've been on vacation, requiring admins to reset it for them. The **Forgotten Passwords** feature enables users to retrieve their password themselves.

Once enabled, users can click on the **I Forgot My Password** link on the login window.

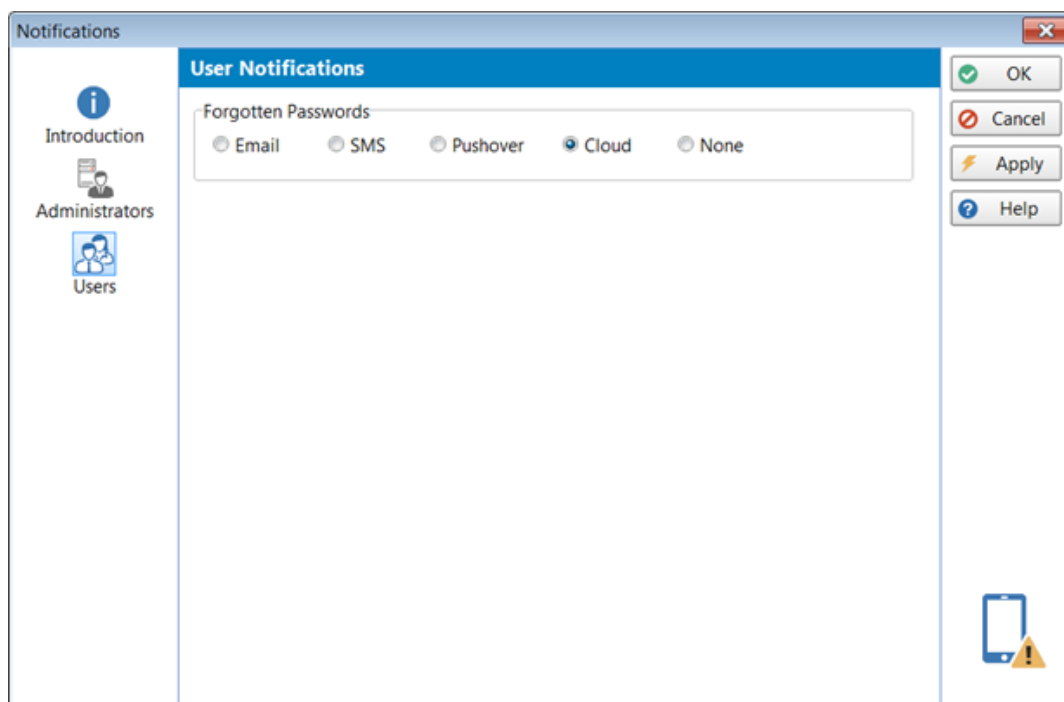


To enable this feature there are a few steps:

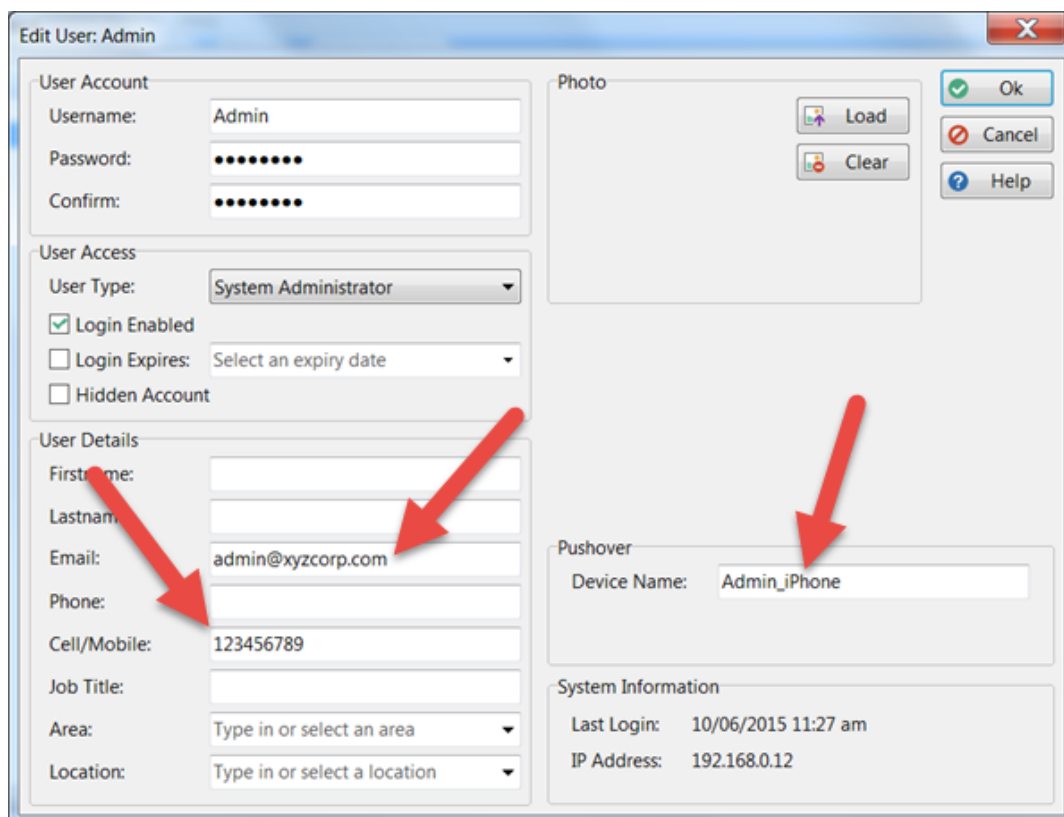
1. Set up your Communication Settings.



2. Set up the User Notification Settings. You can use Email, SMS or Pushover to send users their passwords.



- Depending on which communication method you are using, you will need to add the relevant setting under each user's account, ie. **Email Address**, **Cell/Mobile Number**, or **Pushover Device Name**.



Chapter

10

Sending Caller Information to PhonePad

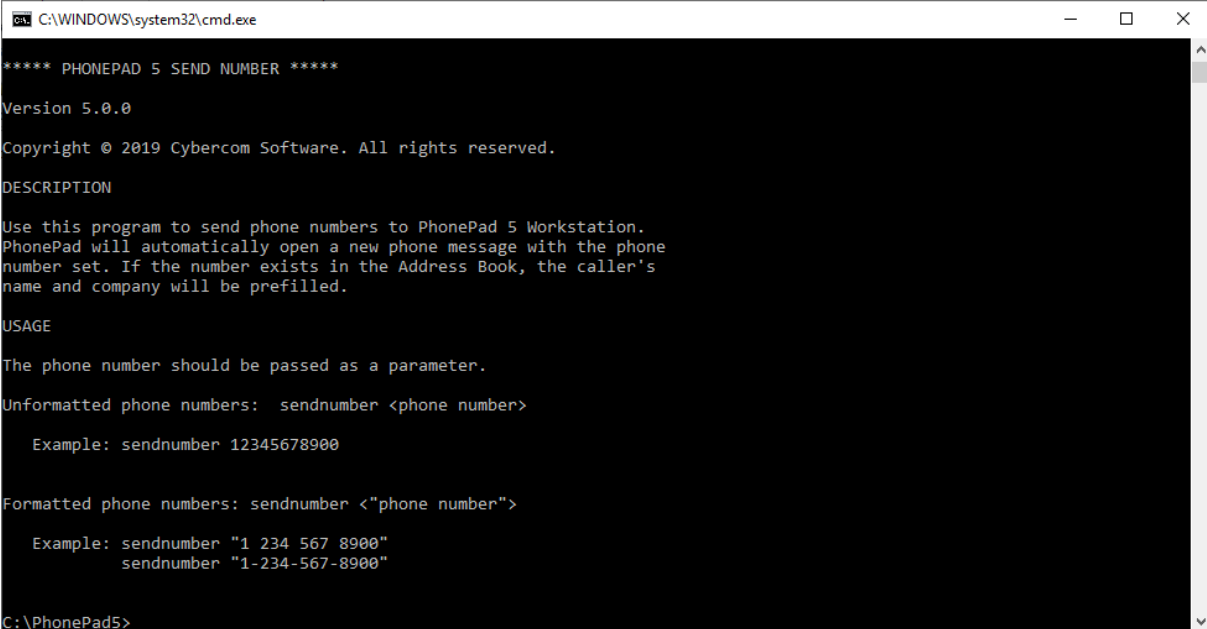
Sending Caller Information to PhonePad

PhonePad Workstation includes 3 command line programs that can be used to send caller information to PhonePad:

- SendNumber
- SendNumberUser
- SendNumberExternalUser

These programs can be called from other system, eg. phone systems, to pass caller information to PhonePad and open a new message form with the data prefilled.

As these are command line programs you will need to run them in a CMD shell. When you run them without parameters they will display information on how to use them.



```
C:\WINDOWS\system32\cmd.exe

**** PHONEPAD 5 SEND NUMBER ****

Version 5.0.0

Copyright © 2019 Cybercom Software. All rights reserved.

DESCRIPTION

Use this program to send phone numbers to PhonePad 5 Workstation.
PhonePad will automatically open a new phone message with the phone
number set. If the number exists in the Address Book, the caller's
name and company will be prefilled.

USAGE

The phone number should be passed as a parameter.

Unformatted phone numbers: sendnumber <phone number>

    Example: sendnumber 12345678900

Formatted phone numbers: sendnumber <"phone number">

    Example: sendnumber "1 234 567 8900"
             sendnumber "1-234-567-8900"

C:\PhonePad5>
```

```
C:\WINDOWS\system32\cmd.exe

Version 5.0.0

Copyright © 2019 Cybercom Software. All rights reserved.

DESCRIPTION

Use this program to send phone numbers for users to PhonePad 5 Workstation.
PhonePad will automatically open a new phone message addressed to the user
with the caller phone number set. If the caller number exists in the Address Book,
the caller's name and company will be prefilled.

USAGE

The phone numbers should be passed as parameters. The caller phone number is optional

Unformatted phone numbers: sendnumberuser <user phone number> <caller phone number>

    Example: sendnumberuser 5678900 19987654321

Formatted phone numbers: sendnumberuser <user phone number> <caller phone number>

    Example: sendnumberuser "567 8900" "1 998 765 4321"
             sendnumberuser "567-8900" "1-998-765-4321"
             sendnumberuser "567 8900"
             sendnumberuser "567-8900"

C:\PhonePad5>
```

```
C:\WINDOWS\system32\cmd.exe

**** PHONEPAD 5 SEND NUMBER EXTERNAL USER ****

Version 5.0.0

Copyright © 2019 Cybercom Software. All rights reserved.

DESCRIPTION

Use this program to send phone numbers for external users to PhonePad 5 Workstation.
PhonePad will automatically open a new phone message addressed to the external user
with the caller phone number set. If the caller number exists in the Address Book,
the caller's name and company will be prefilled.

USAGE

The phone numbers should be passed as parameters. The caller phone number is optional

Unformatted phone numbers: sendnumberexternaluser <user phone number> <caller phone number>

    Example: sendnumberexternaluser 12345678900 19987654321

Formatted phone numbers: sendnumberexternaluser <user phone number> <caller phone number>

    Example: sendnumberexternaluser "1 234 567 8900" "1 998 765 4321"
             sendnumberexternaluser "1-234-567-8900" "1-998-765-4321"
             sendnumberexternaluser "1 234 567 8900"
             sendnumberexternaluser "1-234-567-8900"

C:\PhonePad5>
```

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Chapter



11

Updating PhonePad 5

Updating PhonePad 5

PhonePad 5 includes an easy way to update your software to the latest version whenever one is released. Instead of going to the PhonePad website to look for updates, you can check from within PhonePad.

There are basically 3 types of updates in PhonePad 5:

- Server Updates
- Workstation Updates
- Database Updates

Server Updates

A server update includes updates to the server itself, support applications (eg. Database Restore), and documentation (help files, user guides, etc.).

These updates are handled by the application updates.

Workstation Updates

This includes updates to the PhonePad workstation applications (PhonePad5.exe, PhonePad5Run.exe, InstantChat.exe and WhereRU.exe) as well as documentation (help files, user guides, etc.).

These updates are handled by the application updates.

Database Updates

Database updates are changes to your PhonePad 5 database. These include altering your database to fix problems or adding new features.

These updates are handled by the application updates.

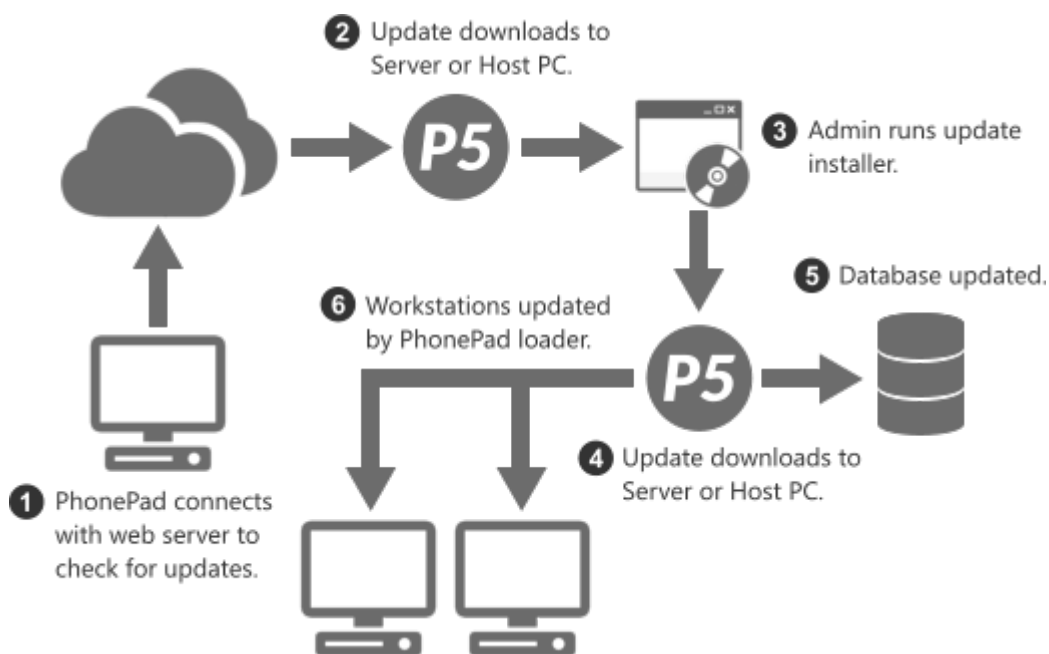


IMPORTANT WARNING: Unless you want to start with a new **blank** database, do **not** try updating PhonePad by downloading the latest full server installer from the website. It is designed for fresh, clean installs **not** updates. You need to download updates using the **Application Updates** feature, or by downloading updates from your account at www.myphonepad.com.

If you use the full server installer to update your Server or Host PC **it will delete your existing PhonePad database.**

How Updating Works

PhonePad 5 has a built-in update system that makes it easy to update your Server or Host PC and each workstation.



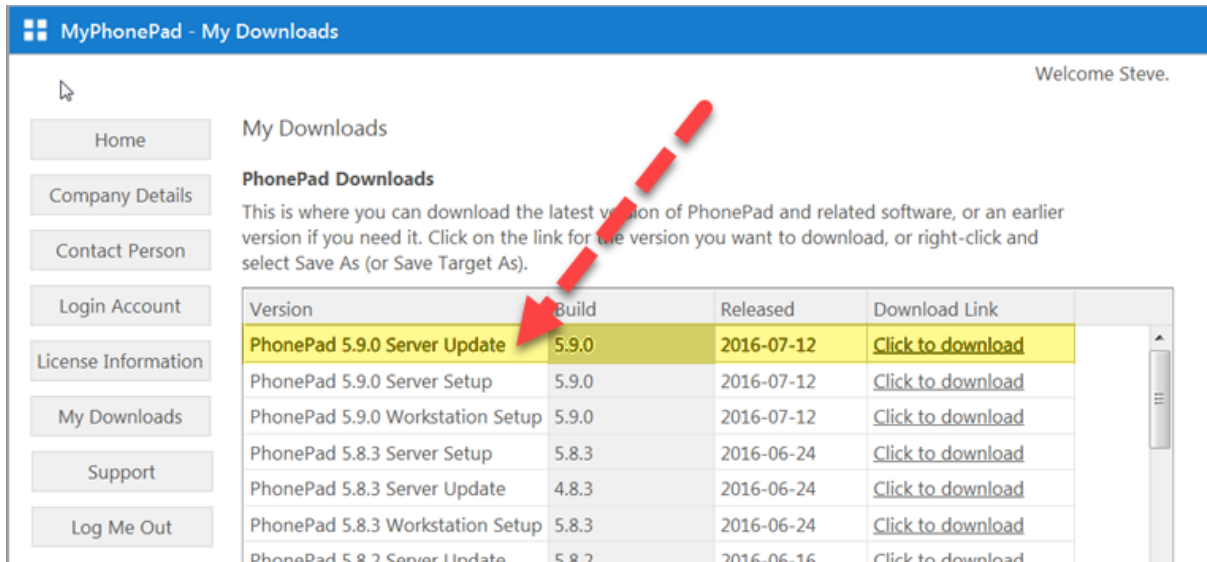
When you install an update on your Server or Host PC, each workstation will be automatically updated the next time the user logs in. No more walking around to each computer and installing an update manually - it's all done for you.

Your PhonePad database will be analyzed and updated to the latest version of the database.

Updating PhonePad from My PhonePad

Login to your My PhonePad account at www.myphonepad.com.

1. Select **My Downloads**.



MyPhonePad - My Downloads

Welcome Steve.

My Downloads

PhonePad Downloads

This is where you can download the latest version of PhonePad and related software, or an earlier version if you need it. Click on the link for the version you want to download, or right-click and select Save As (or Save Target As).

Version	Build	Released	Download Link
PhonePad 5.9.0 Server Update	5.9.0	2016-07-12	Click to download
PhonePad 5.9.0 Server Setup	5.9.0	2016-07-12	Click to download
PhonePad 5.9.0 Workstation Setup	5.9.0	2016-07-12	Click to download
PhonePad 5.8.3 Server Setup	5.8.3	2016-06-24	Click to download
PhonePad 5.8.3 Server Update	4.8.3	2016-06-24	Click to download
PhonePad 5.8.3 Workstation Setup	5.8.3	2016-06-24	Click to download
PhonePad 5.8.2 Server Update	5.8.2	2016-06-16	Click to download

- The latest version will appear at the top of the list.
- Select the latest *Server Update* and click the **Click to Download** link.
- Save the download and run it on your Server or Host PC.

With each release there are 3 setup programs:

Server Update *eg. PhonePad 5.9.0 Server Update* This setup program is used to update your PhonePad 5 Server and PhonePad 5 Workstation to the specific version.

Server Setup *eg. PhonePad 5.9.0 Server Setup* This setup program is used for **new installations** of the PhonePad 5 Server on your Server or Host PC.

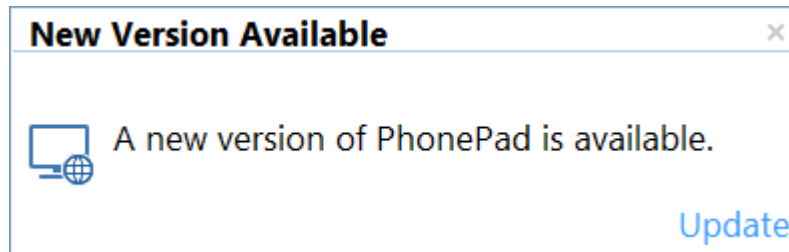
Caution: If you run it on a Server or Host PC that already has PhonePad 5 Server installed, it will overwrite your existing PhonePad 5 database.

Workstation Setup *eg. PhonePad 5.9.0 Workstation Setup* This setup program is used to install PhonePad 5 Workstation **on a new computer**.

It should not be used to update a workstation, unless you really want a fresh install.

Update Notifications

In addition to being able to check for new versions of PhonePad manually, administrators will get a popup notification in the system tray when a new version is available for download.



Clicking the **Update** link will take you to the Server Updates screen.

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Chapter

12

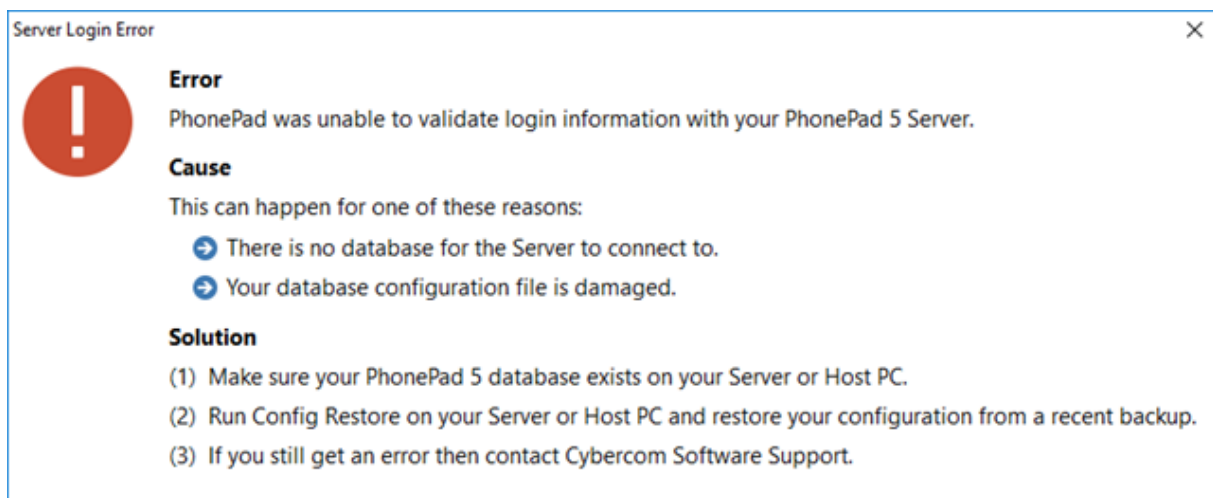
Server Applications

Server Applications

When you install PhonePad 5 Server on your Server or Host PC, a number of important tools are installed as well. Normally you won't need to use most of these tools but they are there if you need them.

Config Restore

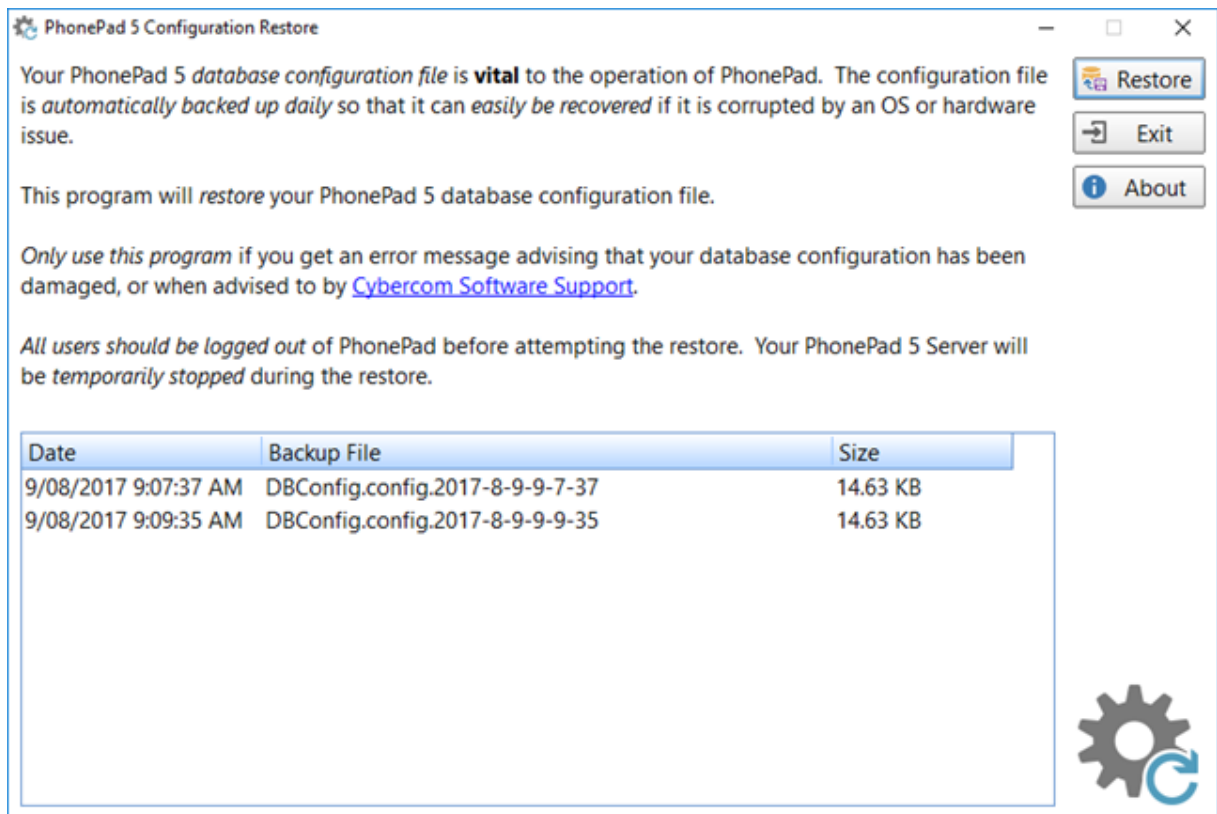
If your database configuration file is damaged you may get this error message when starting PhonePad 5 workstation.



Fortunately your PhonePad 5 Server backs up your database configuration file whenever your automatic backups are performed (or when you do a manual backup).

You can resolve this issue by following these steps:

1. Go to the *PhonePad 5 Server* folder on your Server or Host PC.
2. Run **Config Restore**.



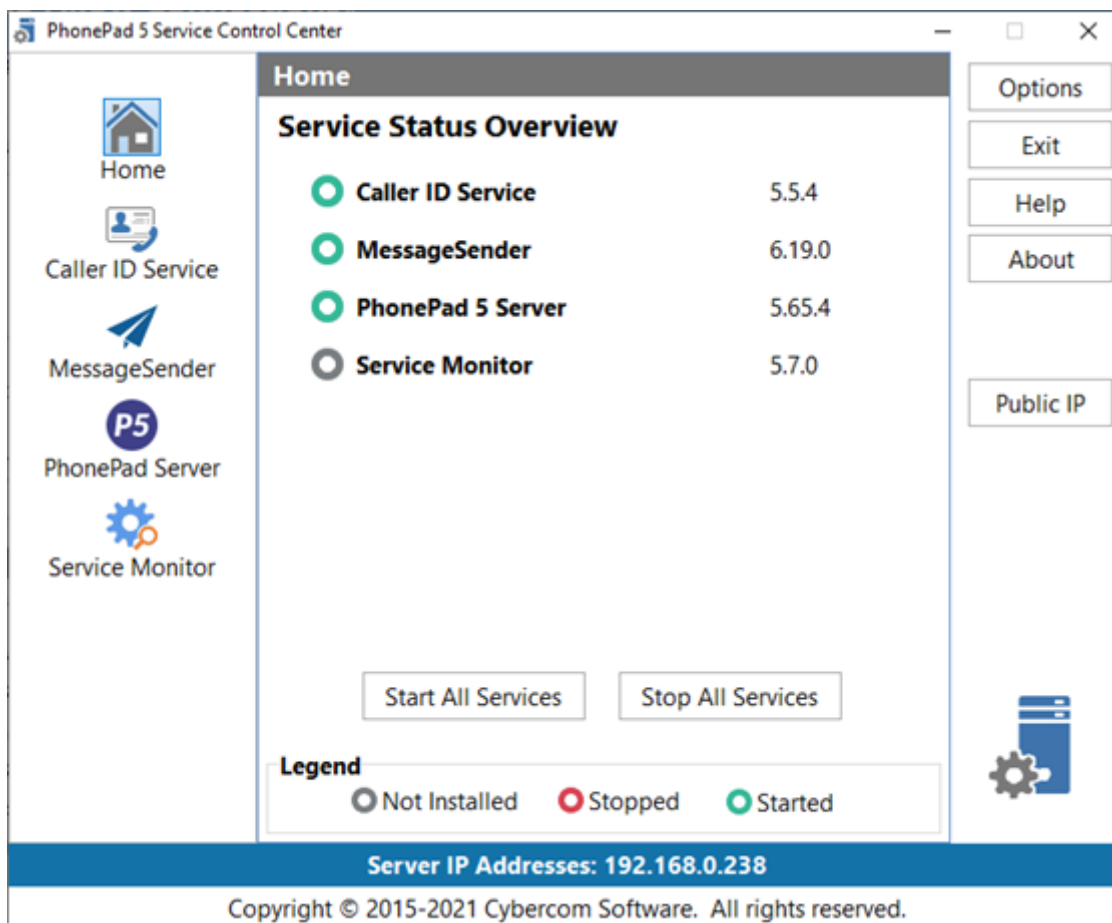
3. Select a recent backup.
4. Click the **Restore** button.
5. You will be asked to confirm the restore.
6. The database configuration file will be restored from the selected backup.
7. Run PhonePad and check to make sure it now starts correctly.



Users need to be logged out of PhonePad before you can restore a database configuration file. Config Restore will stop your PhonePad 5 Server temporarily while the restore is being performed, which means any users currently logged in to PhonePad will lose their connections.

Control Center

Control Center is used to manage and control the various services that form the PhonePad Server side of things.

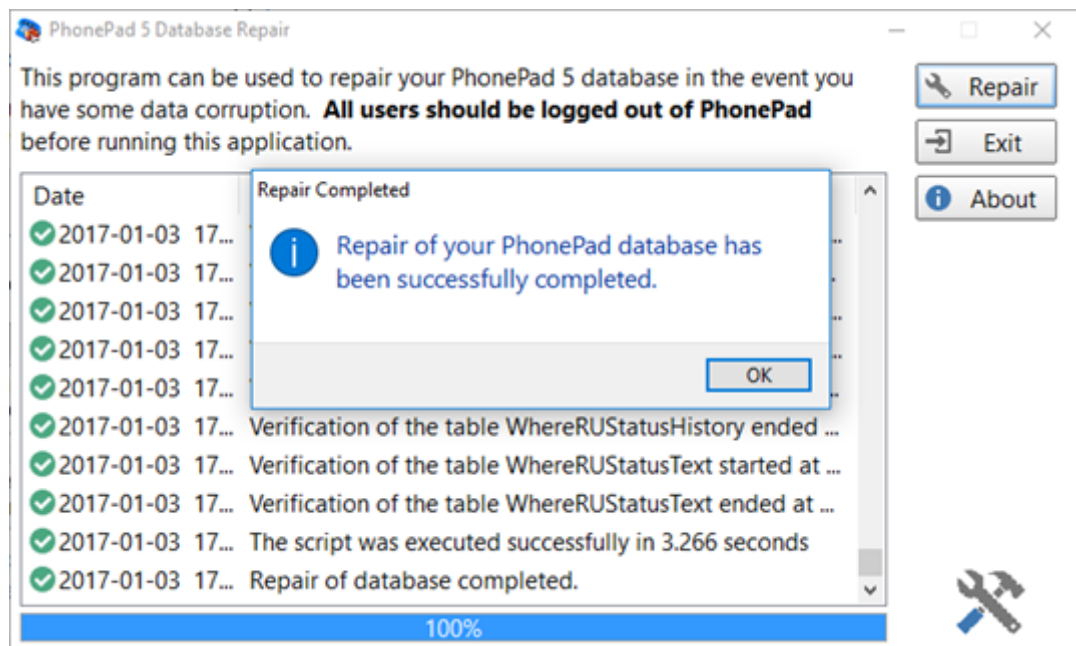


The **Home** or **Overview** screen is displayed on startup and shows the current status of all services, as well as the currently installed version number.

Check the section on Managing PhonePad Services for more information.

Database Repair

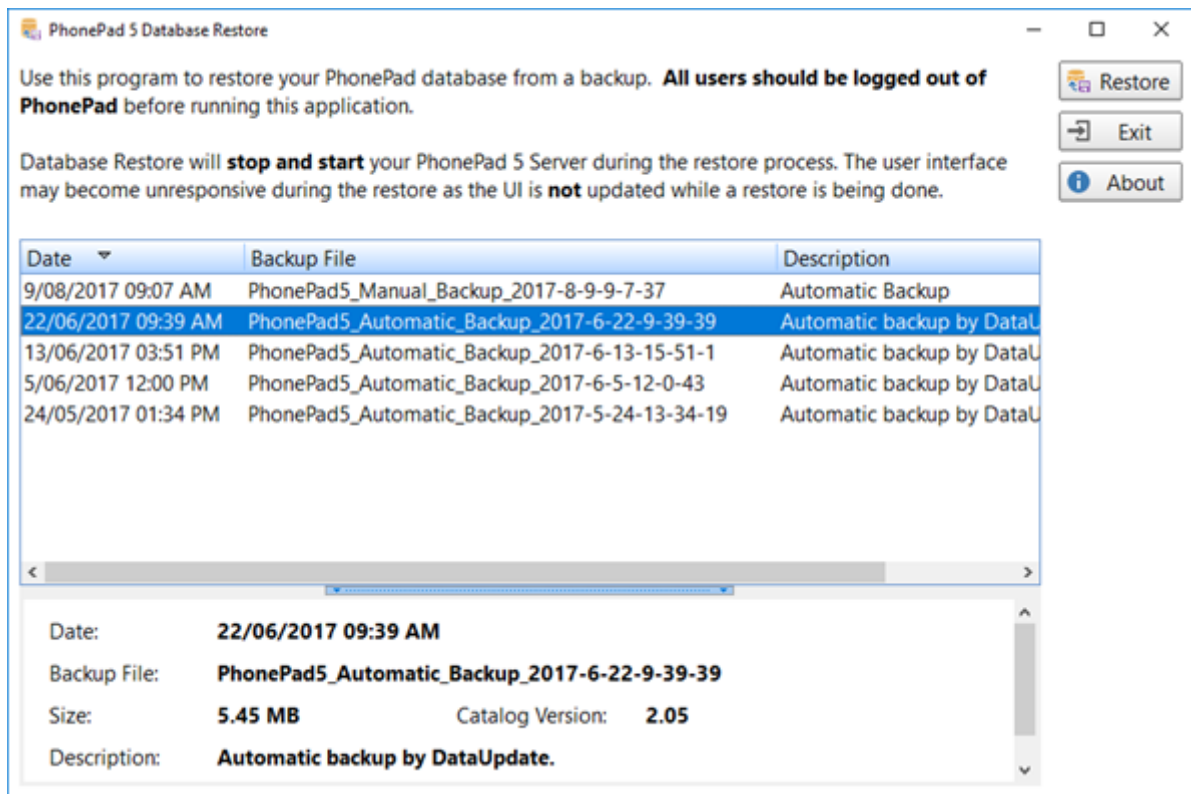
As the name suggests, Database Repair is used to repair your PhonePad 5 Database should it become damaged for some reason.



For more information, see the section entitled Repairing Your PhonePad Database.

Database Restore

We're hoping you will never need to use this, but if there is a need to restore your PhonePad 5 database from backup then this program makes it quick and easy.

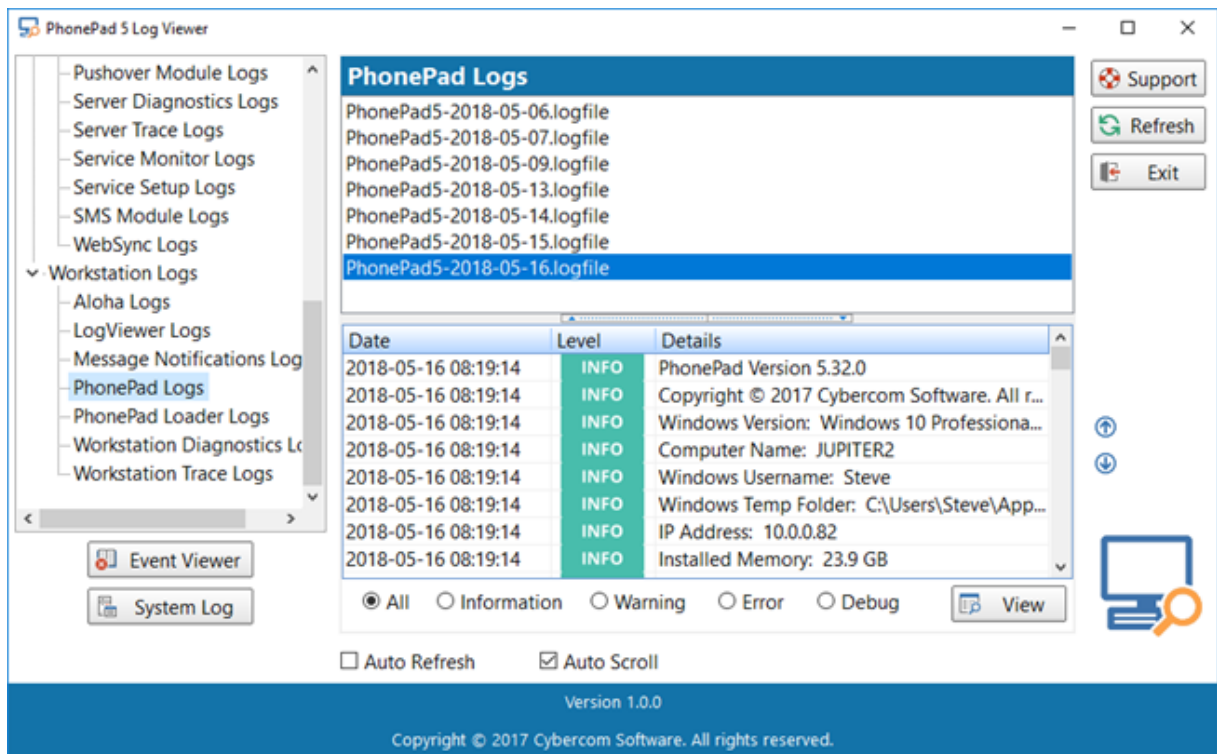


For more information on restoring from backup, see this section: [Restoring Your Data from a Backup](#).

Log Viewer

PhonePad generates a number of logs that track system activity and performance. They don't contain any personal data (you can verify this yourself by examining the logs).

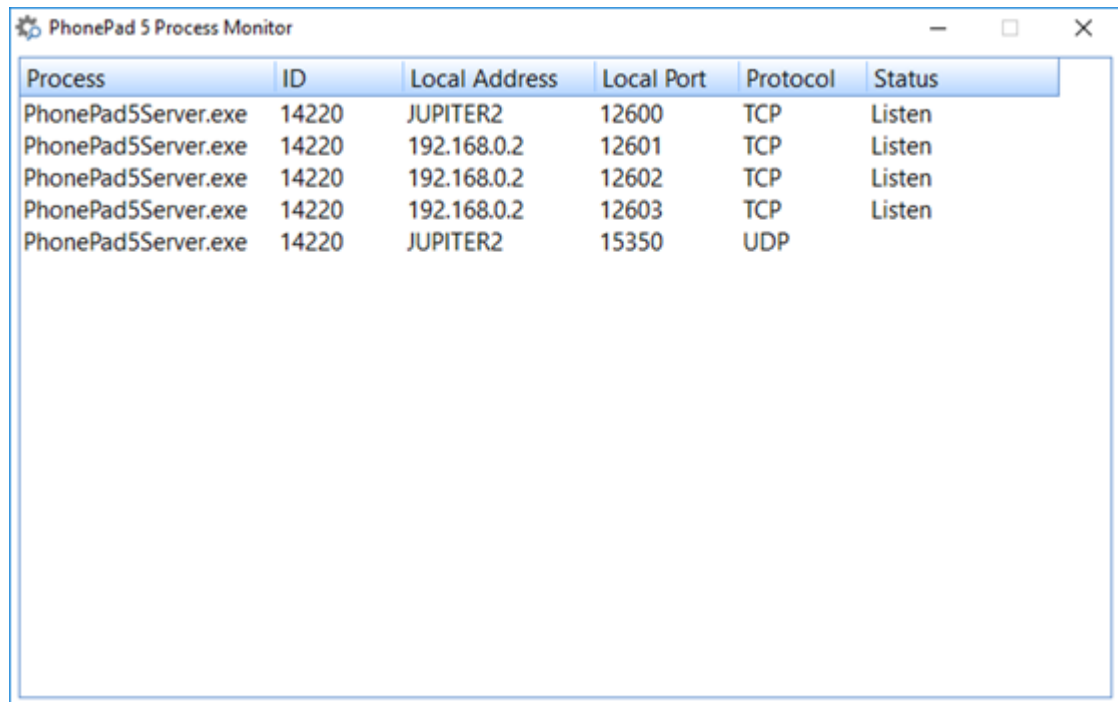
Log Viewer is generally used by Support staff to help isolate the cause of a problem you may be experiencing. You may be asked by us to run Log Viewer and send your logs to us so that we can diagnose an issue.



For more information, refer to the Logs section.

Process Monitor

Process Monitor is similar to Windows Task Manager and other system tools, but with greatly reduced functionality. It has one purpose: to show which ports and protocols PhonePad is using on your Server or Host PC. This is used to help isolate any connection errors you may be having.



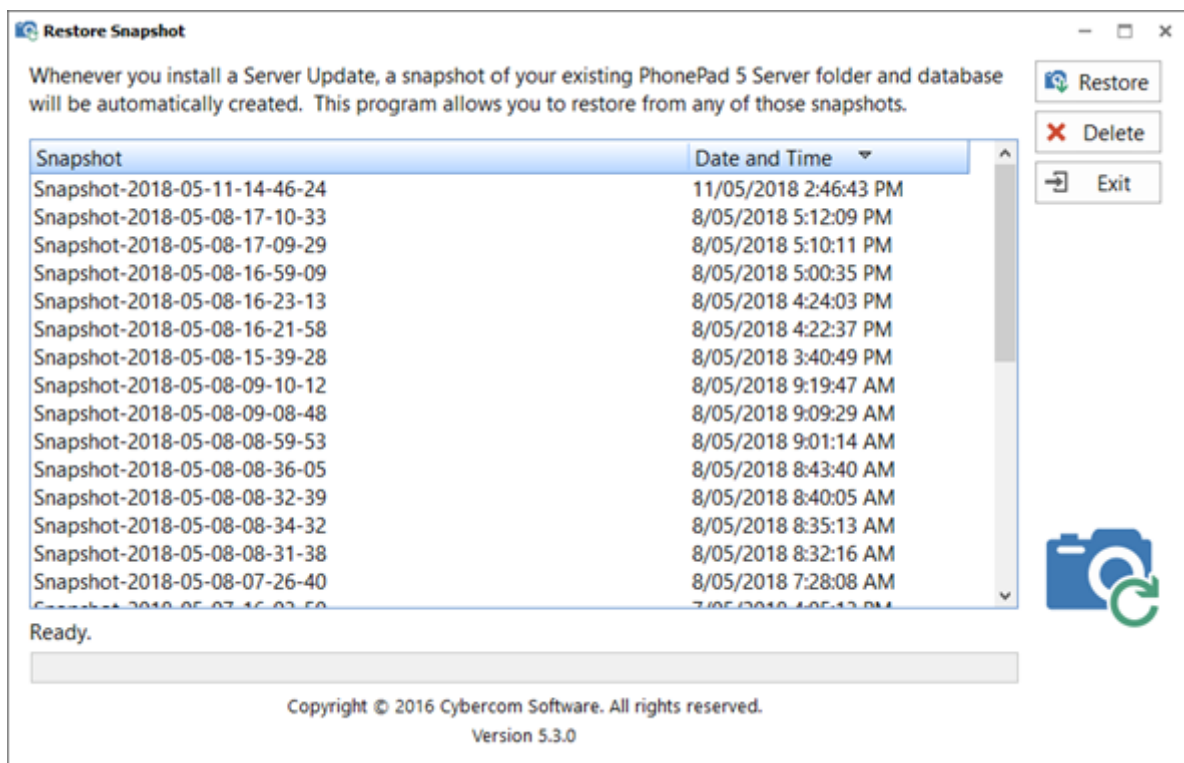
The screenshot shows a window titled "PhonePad 5 Process Monitor". Inside the window is a table with the following data:

Process	ID	Local Address	Local Port	Protocol	Status
PhonePad5Server.exe	14220	JUPITER2	12600	TCP	Listen
PhonePad5Server.exe	14220	192.168.0.2	12601	TCP	Listen
PhonePad5Server.exe	14220	192.168.0.2	12602	TCP	Listen
PhonePad5Server.exe	14220	192.168.0.2	12603	TCP	Listen
PhonePad5Server.exe	14220	JUPITER2	15350	UDP	

Refer to Connection Issues for more information.

Restore Snapshot

Restore Snapshot is a program that is designed to help you quickly revert your PhonePad system back to a previous state.



A snapshot is another form of backup performed by PhonePad. There are some differences though:

- Like automatic and manual backups, snapshots back up your database files. But they also back up everything in your PhonePad 5 Server folder.
- Snapshots are only run when you install a server update.

Snapshots automatically capture the current state of your PhonePad 5 Server or Host *before* a server update is performed. The idea behind this is, should something go horribly wrong during the server update, you can use the Restore Snapshot program to restore your PhonePad installation on your Server or Host PC back to the way it was immediately before the update.

This means you can get back up and running quickly with very little downtime. And it gives us time to work out what went wrong with the update (if there was a problem with the update itself, or if there was some soft of OS or hardware issue on your Server or Host PC).

See the section entitled Restoring from a Snapshot.

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Chapter



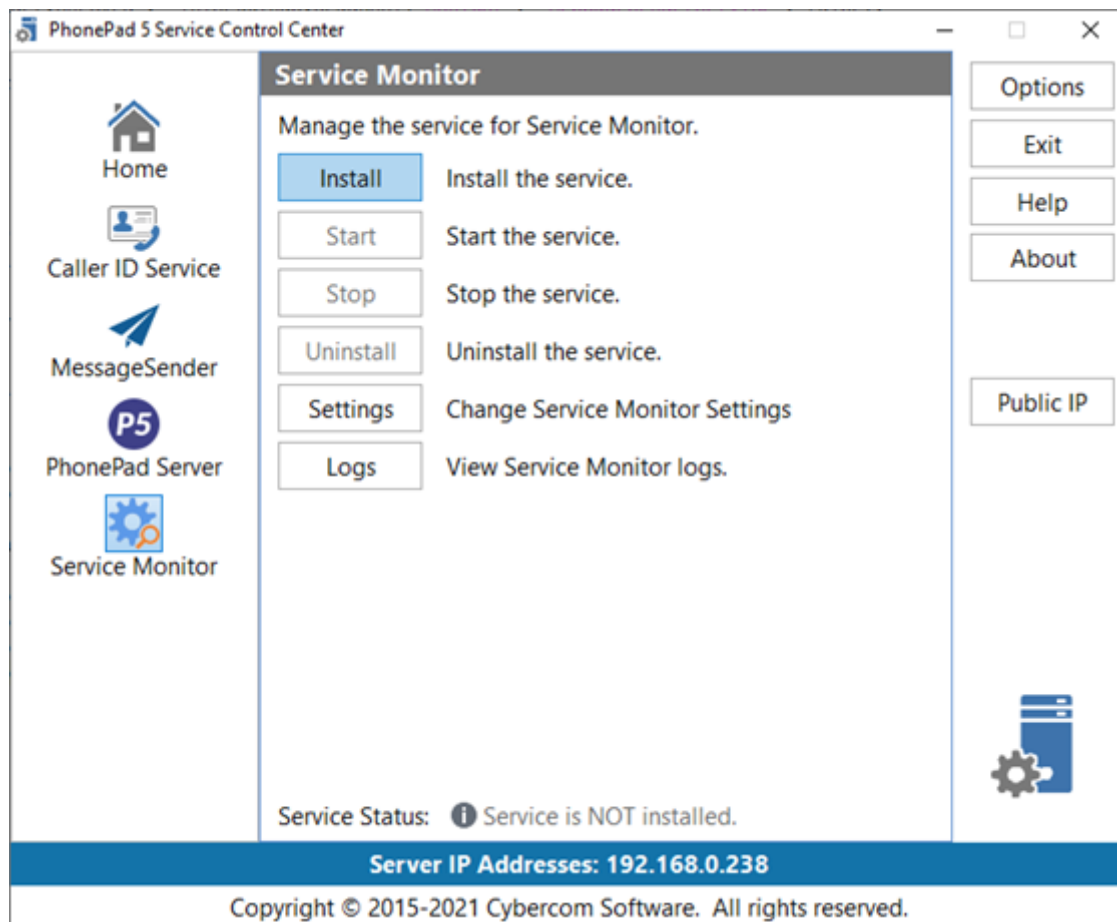
13

Monitoring the PhonePad Services

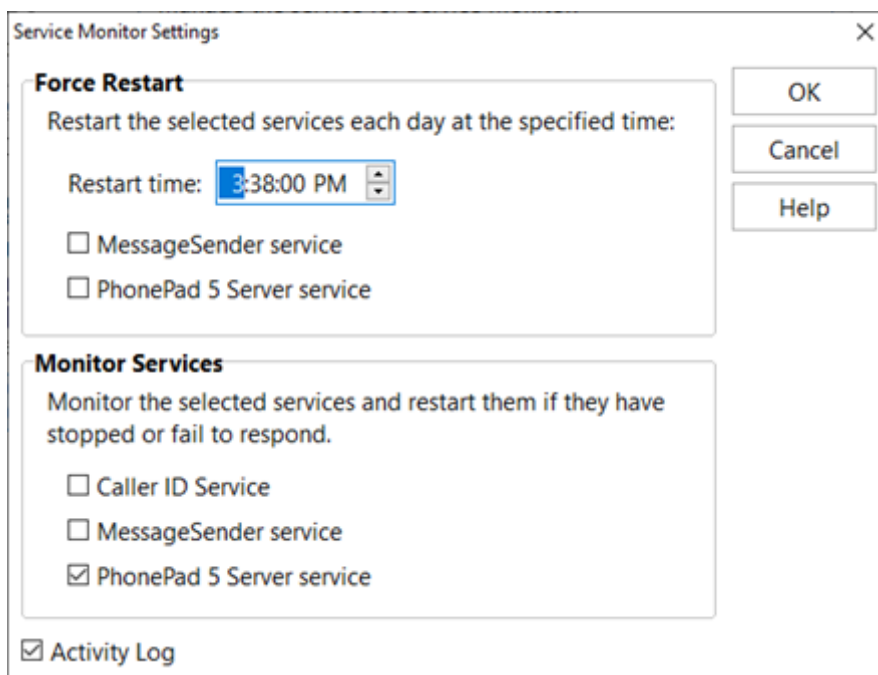
Monitoring the PhonePad Services

If any of the PhonePad services stop responding for some reason, you can install Service Monitor to automatically restart the services affected. It is not installed by default.

1. Run **Control Center**.
2. Select **Service Monitor**.



3. Click **Install**.
4. Click **Start**.
5. Click **Settings**.

The image shows a 'Service Monitor Settings' dialog box. It has a title bar with a close button (X). The dialog is divided into two main sections. The first section is titled 'Force Restart' and contains the text 'Restart the selected services each day at the specified time:'. Below this is a 'Restart time:' label followed by a time picker showing '3:38:00 PM'. There are two checkboxes: 'MessageSender service' and 'PhonePad 5 Server service', both of which are currently unchecked. The second section is titled 'Monitor Services' and contains the text 'Monitor the selected services and restart them if they have stopped or fail to respond.'. It has three checkboxes: 'Caller ID Service' (unchecked), 'MessageSender service' (unchecked), and 'PhonePad 5 Server service' (checked). At the bottom of the dialog is a checkbox labeled 'Activity Log' which is checked. On the right side of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

6. Make the required settings and click **OK**.

Force Restart

You can set services to restart at a specific time each day. If there is a process running on your Server or Host PC that causes a service to stop running or become unresponsive, you can use the Force Restart feature to automatically restart the service at a specific time each day. The default is 5:00 am.

Force Restart	
Restart Time	Specifies the time each day to restart the selected services.
MessageSender Service	When checked, the MessageSender service will be restarted. THIS IS NOT AVAILABLE YET AS IT REQUIRES AN UPDATE TO MESSAGESENDER.
PhonePad 5 Server Service	When checked, the PhonePad Server service will be restarted.

Monitor Services

Services being monitored by the Service Monitor service will be automatically restarted within a few minutes if they stop running, or if they stop responding.

Monitor Services	
Caller ID Service	When checked, the Caller ID service will be monitored.
MessageSender Service	When checked, the MessageSender service will be monitored.
PhonePad 5 Server Service	When checked, the PhonePad Server service will be monitored.



It's not normal for services to stop running or responding so if this does happen please report this to Cybercom Software Support. The Service Monitor service should keep PhonePad up and running while we investigate the issue.

Chapter



14

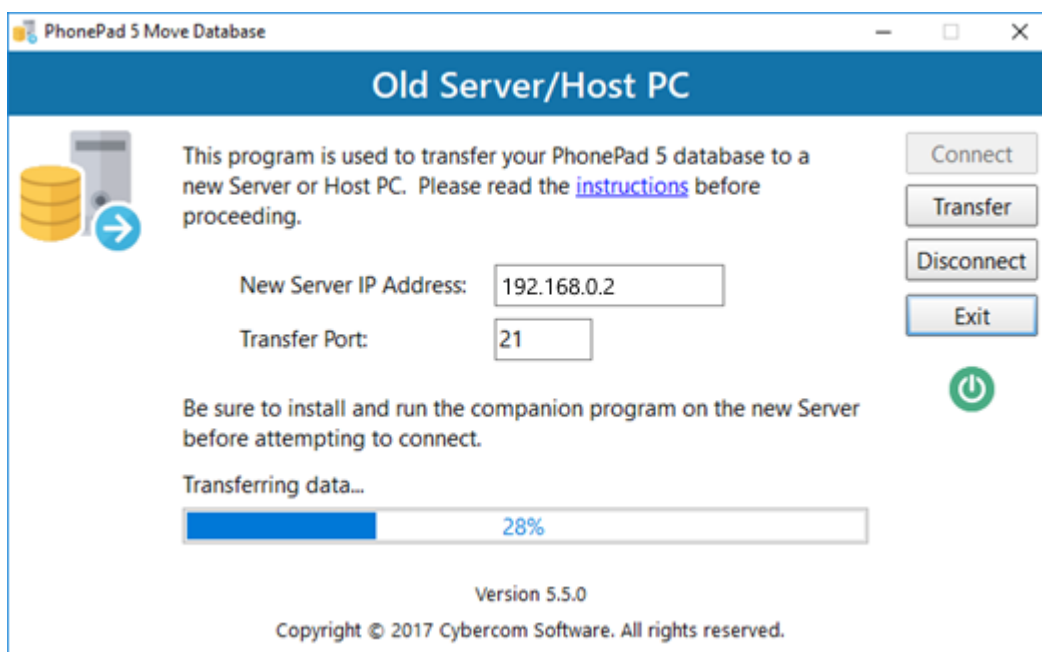
Moving Your PhonePad Database

Moving Your PhonePad Database

PhonePad includes methods for moving your PhonePad database to another drive or another computer.

Moving Your PhonePad 5 Database to Another Server or Host PC

If you need to move your PhonePad 5 database to a different Server or Host PC you can do this easily with the **Move Database** application (which you can download by clicking this link)



Download and install **Move Database** on both your old Server/Host PC and your new Server/Host PC.

Follow the instructions in the included manual or access the online instructions.

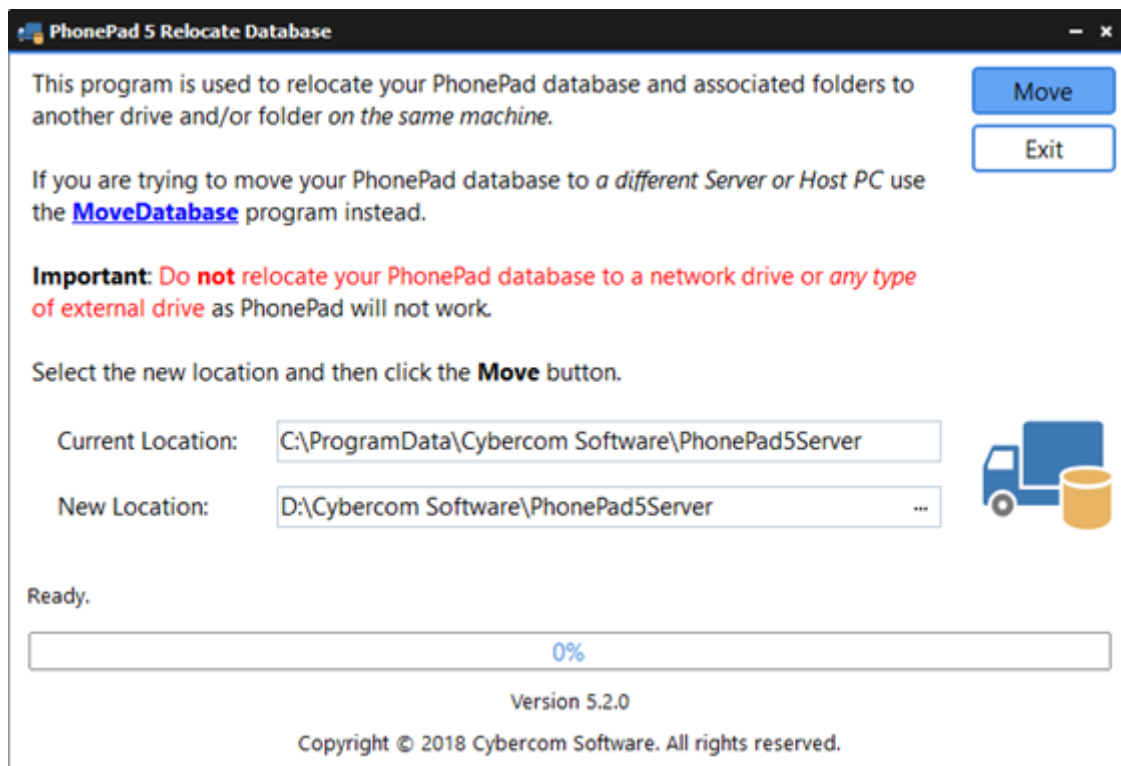
Relocating Your PhonePad Database to Another Drive

By default, your PhonePad database is located under *C:\ProgramData\Cybercom Software\PhonePad5Server*.

If your Server or Host PC has more than one physical or logical drive then you can optionally move the database to that drive. For example, some users like to reserve the C: drive for the operating system and a D: drive for data.

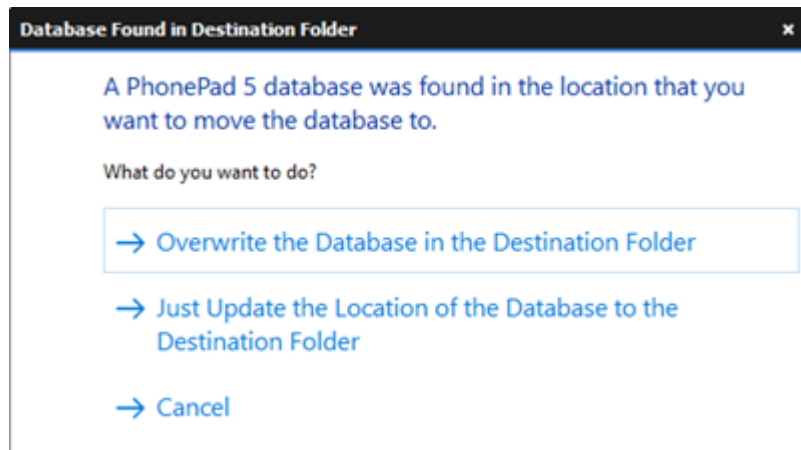
If you want to move your database to a different drive then a program is included with PhonePad specifically to do this.

1. Open the C:\PhonePadServer folder.
2. Open **RelocateDatabase**.



3. Enter or select the new location for the database.
4. Click **Move** and then confirm this action when prompted.
5. Your database and associated folders will be moved to the new location.

If the PhonePad 5 database already exists in the location you select, this message will be displayed.



The first option will overwrite the database in the destination located.

The second option will just update the location of the database in the system without overwriting anything.

The third option will cancel the relocation.



If you want to move your PhonePad database to another Server or Host PC, use the Move Database program instead. You can click on the MoveDatabase link in Relocate Database to take you to the website page where you can download MoveDatabase.



For technical reasons, the PhonePad database cannot be located on a network drive or an external drive such as a USB drive or NAS. If you move the database to these types of drives PhonePad **will stop working**.

Chapter



15

Protecting Your Data

Protecting Your Data

The more you use PhonePad the more important it will be to take care of your data. Imagine how catastrophic it could be if you lost all of your phone messages, Address Book contacts, follow up notes, and other important information that PhonePad stores.

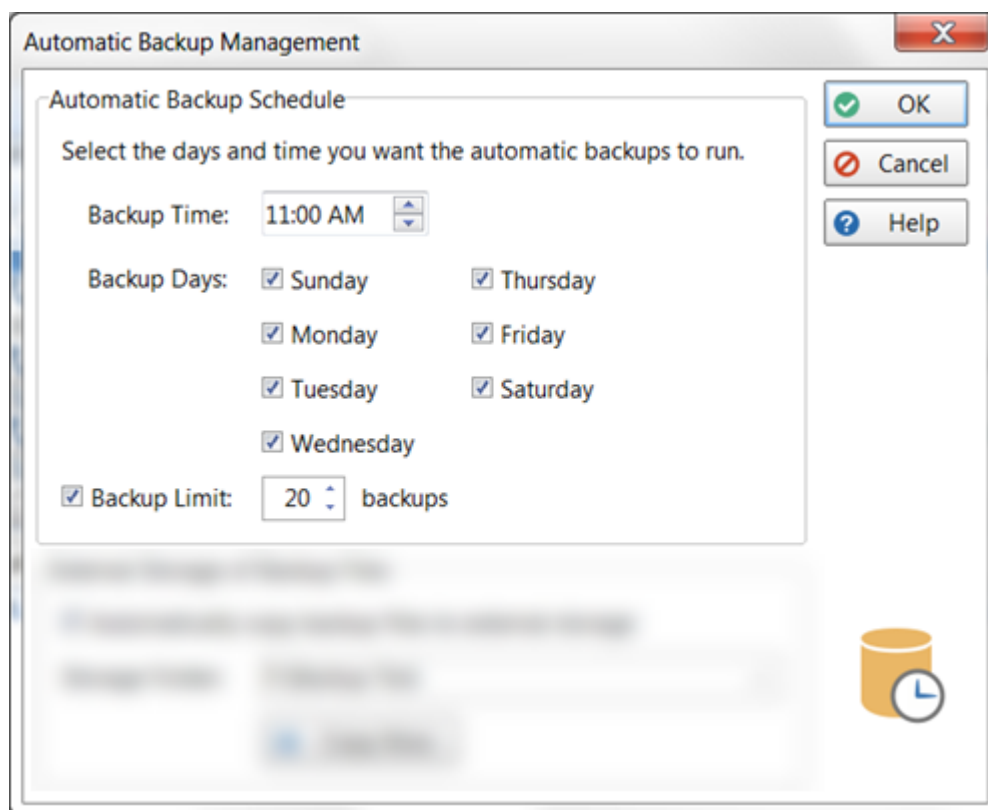
To help you protect your data PhonePad has some built-in mechanisms.

Automatic Backups

PhonePad 5 has an Automatic Backup system built-in. It's designed to be "set and forget", which means once it's been set up you don't have to remember to back up your PhonePad database

When the PhonePad 5 Server is installed for the first time a default backup schedule is automatically created for you, so your data is protected from Day 1.

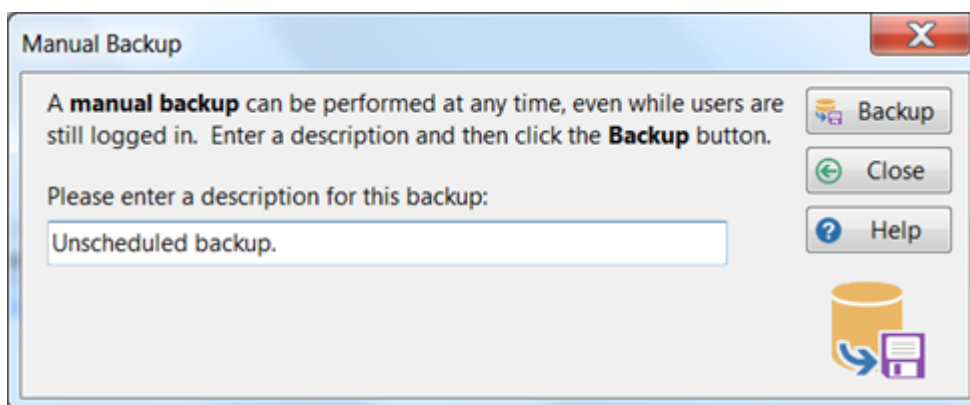
You can change the schedule to suit your needs at any time.



One advantage the AutoBackup system has over other backup methods is that users don't need to be logged out while backups are running.

Manual Backups

You can of course run a manual backup at any time for ad hoc backups. You shouldn't rely on manual backups as an ongoing backup strategy because as humans we tend to forget things. Better to leave it up to AutoBackup for your regular backups.



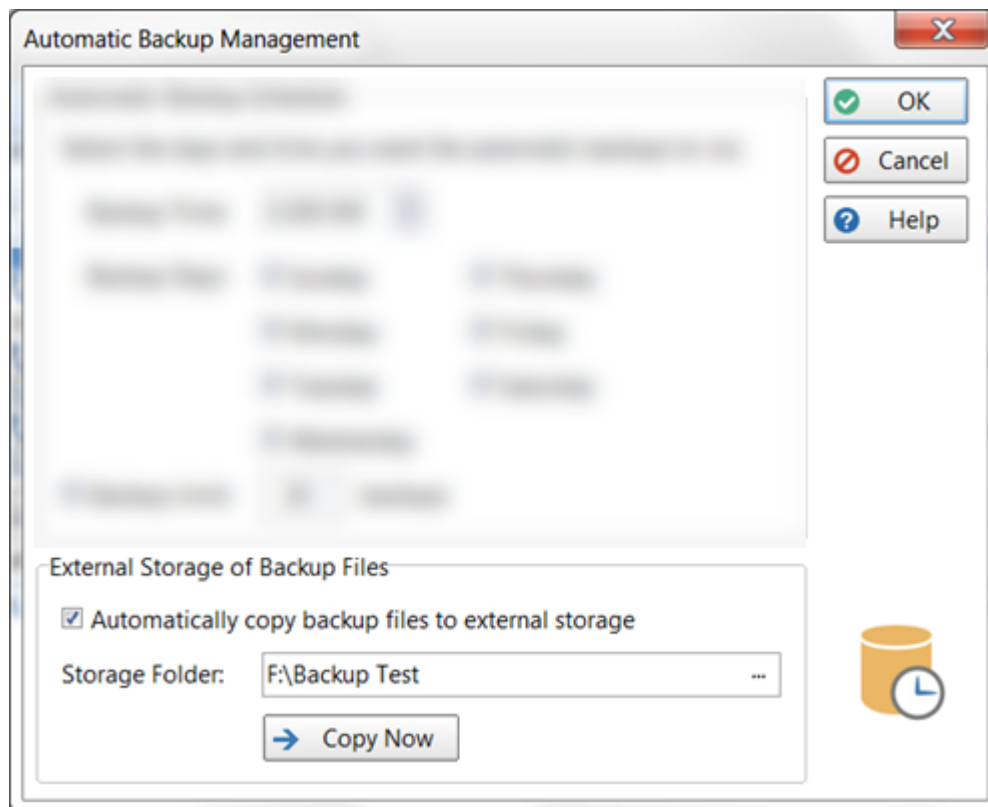
Backing Up Your Backups

Copying Your Backups to External Storage

Backups are all well and good but if your server decides to call it quits you want more than just the backups on your server's hard drive.

The AutoBackup system has an automatic copying system to quite literally make a backup of your backups whenever an automatic backup has been performed. This can be to another hard-drive, either internal or external, a USB drive, or even an online service like Dropbox.

Personally we like to use Dropbox for storing copies of our backups. That way if we lose the local backups for some reason we can always retrieve them from the online storage.



Server Backups

If you don't already have backup software on your Server or Host PC, then we recommend you install one. We are often surprised how many of our customers don't have any form of backup system installed. You can get away with it for a while but one day something will happen to make you grateful that you have been regularly backing up your data.

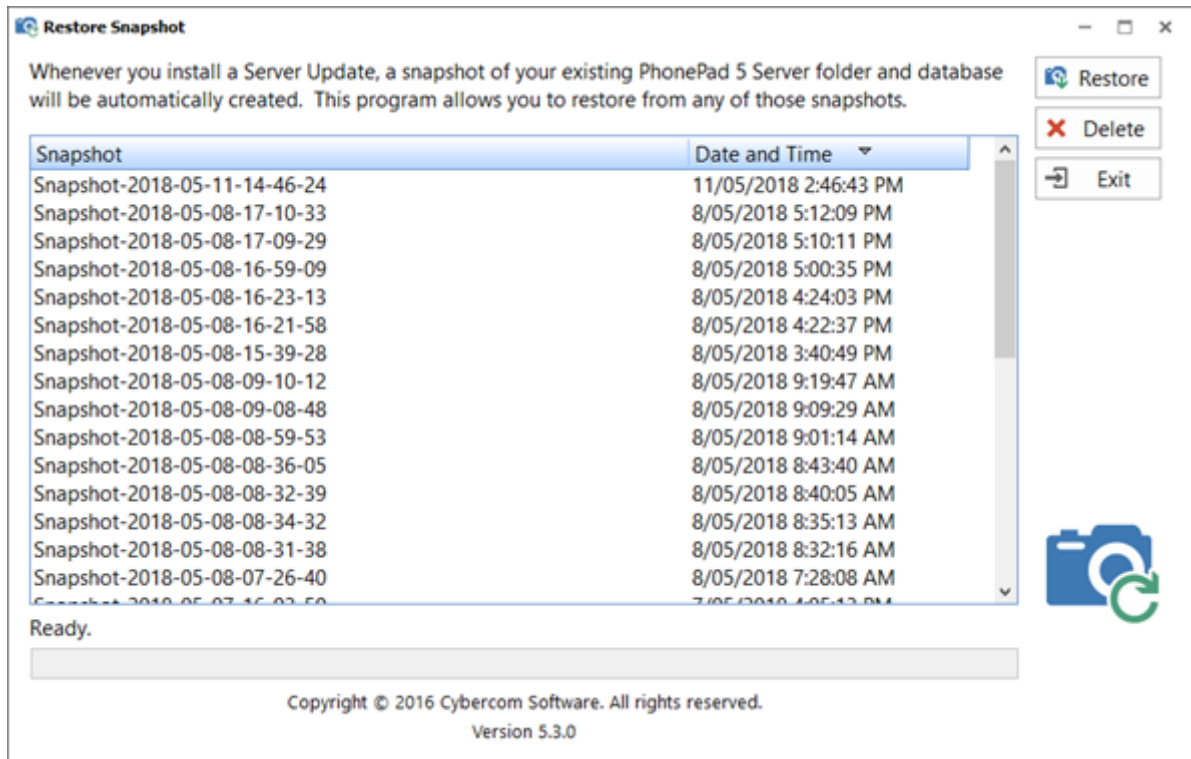
Although PhonePad 5's AutoBackup backs up your PhonePad 5 database it doesn't back up anything else including the PhonePad application files. This is not much of a problem because you can always download and install the software again from your My PhonePad account. This only takes a few minutes and all of your valuable data and configuration information can be restored from your backups.

You can also restore everything quickly and easily if you use a 3rd party backup package.

Snapshots

With the release of PhonePad Version 5.15.0, the server update process now takes a "snapshot" of your PhonePad installation on your Server or Host PC. Not only does it make a copy of your PhonePad 5 database, it also copies your PhonePad 5 Server application files.

This means if something goes wrong during an update, you can quickly revert back to your previous setup with a couple of mouse clicks and very little downtime.



Backups vs Snapshots

In case you're wondering what the difference is between PhonePad 5 backups and snapshots, this table shows you what is included in each type.

Files	Automatic and Manual Backups	Snapshots
Server Application Files	NO	YES
Database	YES	YES
Configuration Files	YES	YES
Backups	YES	NO
Logs	YES	NO
Workstation Updates	NO	YES

Backups

Backups are primarily designed to make a copy of your database and configuration files. Restoring from a backup will revert your database back to the way it was when the backup was made.

Backups tend to be a lot smaller than snapshots.

Snapshots

Snapshots are intended to get you up and running quickly when something goes wrong, specifically with updates. If an update fails for some reason, you may be left with the wrong version of some or all of your database files.

If you restore from a backup, the restored database may not be the same version as the updated application files. This can leave you with application files that are not compatible with the restored database files. What you would then need to do next is to download the correct version of your PhonePad 5 Server application files and install them.

Instead of restoring from a backup in this situation, you should restore from a snapshot. This will restore both your database files and applications files. This is much faster and easier than restoring your database and then reinstalling your PhonePad Server files.

Snapshots tend to be a lot larger than backups.

Chapter



16

Troubleshooting Problems

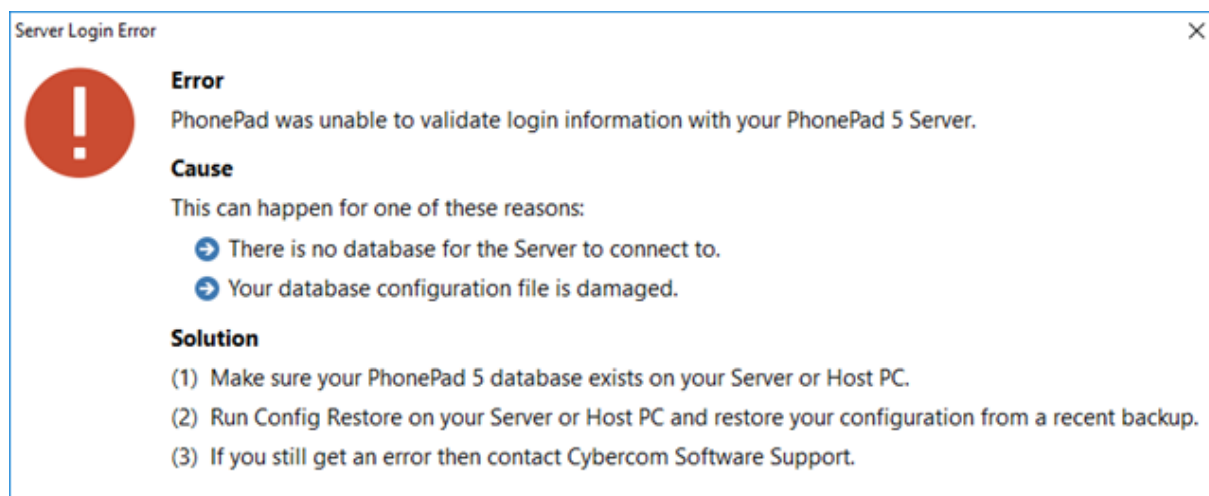
Troubleshooting Problems

Startup Problems

This section describes some of the most common start up errors.

Login Validation Error

If this error appears when starting PhonePad, it's usually an indication that your database configuration file has been damaged.



A damaged configuration file can be caused by:

- A Operating System issue.
- A hardware issue or fault.
- The Server or Host PC is powered down without going through the normal Windows shutdown process.
- The Server or Host PC crashes.
- Power surges or lightning strikes.

The PhonePad 5 Server automatically backs up your database configuration file on a daily basis, so if you do get this error you can quickly restore a backed up configuration file (provided that is not damaged as well).

See Config Restore for more details.

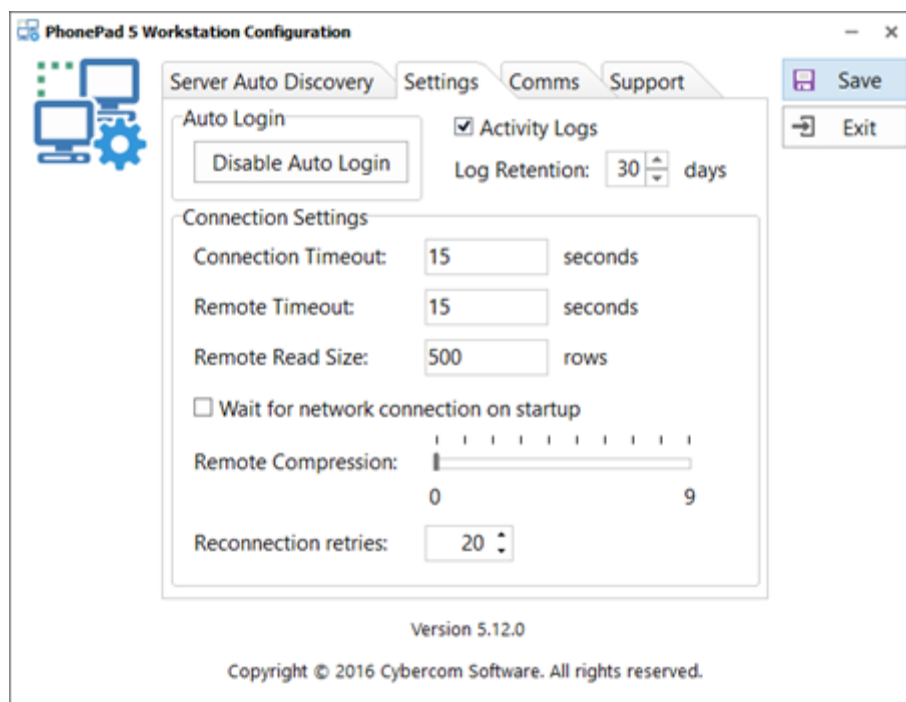
Windows Startup

If you have PhonePad configured to start automatically when Windows starts, in some cases PhonePad may not be able to establish a connection with the Server or Host PC.

Sometimes it can take a few seconds or more for the workstation's network adapter to connect to your network. If this happens then PhonePad will be unable to locate your PhonePad 5 Server will probably display a connection error or may just sit there in a state of limbo.

To resolve this, you can configure PhonePad to wait until a network connection is available:

1. Go to the *PhonePad 5* folder on your workstation.
2. Run **Workstation Config**.
3. Select the **Settings** tab.



4. Check the *Wait for network connection on startup* check box.
5. Click **Save**.

When you start PhonePad now you will see that it waits for a network connection before proceeding.



Freezing on Startup

If PhonePad freezes when starting it on your workstation, the most common cause is anti-virus software (or anti-malware, anti-spyware, etc.). This can happen in the following situations:

- You have installed PhonePad for the first time.
- You have updated PhonePad to a new version.
- Your anti-virus software has been updated.

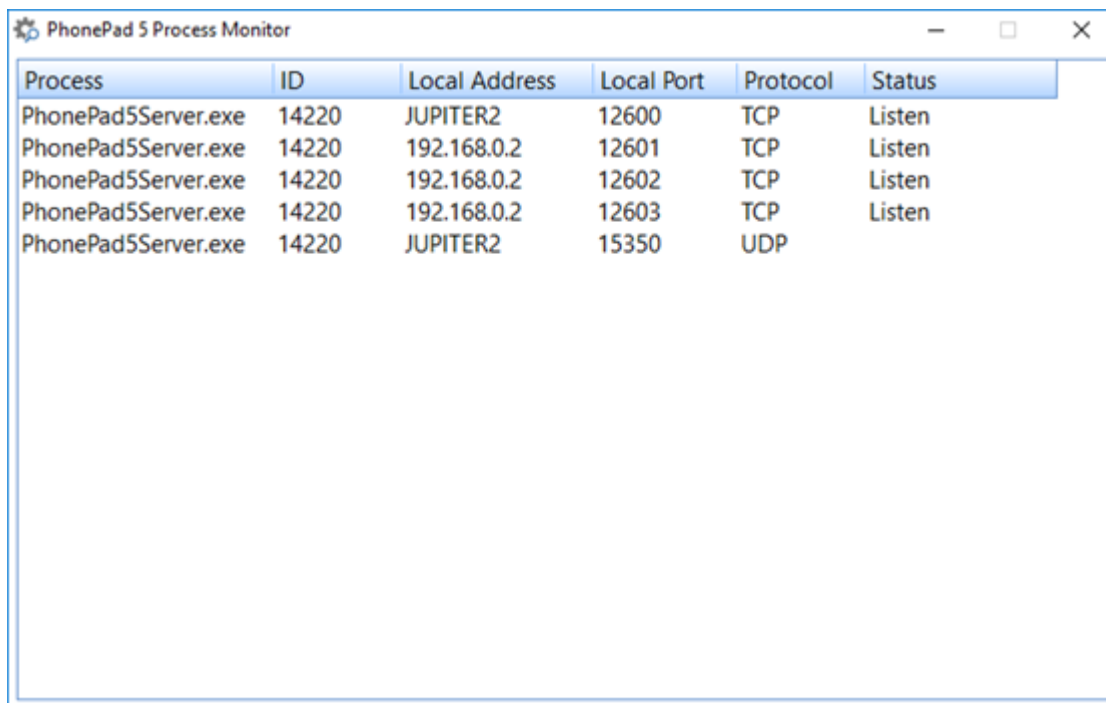
Check your anti-virus software to make sure it is configured to allow PhonePad to run, and that it does not perform any type of real-time scanning of PhonePad. Unfortunately we cannot offer advice or instructions on how to do this as there are dozens of anti-virus products available, and their interfaces change frequently.

You may need to do these checks on both your workstation(s) and Server or Host PC.

Connection Issues

If PhonePad has trouble connecting to the PhonePad 5 Server, there is a program in the PhonePad 5 Server folder on your Server or Host PC called **Process Monitor**. You can use Process Monitor to check to make sure that PhonePad 5 Server has the appropriate ports open, which are: 12600, 12601, 12602, 12603 and 15350.

Run **ProcessMonitor**. You should see the following screen.



Process	ID	Local Address	Local Port	Protocol	Status
PhonePad5Server.exe	14220	JUPITER2	12600	TCP	Listen
PhonePad5Server.exe	14220	192.168.0.2	12601	TCP	Listen
PhonePad5Server.exe	14220	192.168.0.2	12602	TCP	Listen
PhonePad5Server.exe	14220	192.168.0.2	12603	TCP	Listen
PhonePad5Server.exe	14220	JUPITER2	15350	UDP	

When PhonePad 5 Server is running you should see similar results. Of course, the process ID and Local Address will be different, but the Local Ports and Protocols should be the same.

If port 12600 is not displayed then there is a problem with the port.

1. **Try stopping and starting the PhonePad 5 Server** using Control Center to see if that resolves it.
2. Check to make sure there are no firewalls blocking the connection.
3. Check your anti-virus/anti-malware/anti-spyware software to see if that is blocking the connection.



For a complete guide to resolving connection issues, please visit this page on our website:
<https://www.cybercom-software.com/phonepad-connection-problems.htm>



Process Monitor can also be started from the Control Center. Just select **PhonePad Server** and then click the **Processes** button.

Logs

Logs are an important tool for diagnosing and fixing any issues that may occur. PhonePad generates a number of logs that track successful and unsuccessful operations. Some of these logs will only appear if errors are encountered.

If you get an error message while using PhonePad and can't remember what the error message was, it's high likely that the error was recorded in a log file.

Server Logs

These are the logs generated on the Server or Host PC:

- Aloha logs - logs Auto Discovery requests and responses.
- AutoUpdate logs - logs all Automatic Update activity.
- AutoUpdate Service Setup logs - logs the installation and setup of the AutoUpdate service.
- Backup Module logs - logs all backups.
- Caller ID logs - logs Caller ID errors.
- Cloud Module logs - logs cloud errors.
- Config Module logs - logs config module errors.
- Config Restore logs - logs Config file restores.
- Database Repair logs - logs database repairs including any issues found.
- Database Restore logs - logs database restores.
- Database Migrator logs - logs
- DataUpdate logs - logs any changes to the PhonePad database as part of an automatic or manual server update.
- Email Module logs
- Notification Server logs - logs Notification service connections and processes, which are used as part of the Dynamic Refresh feature.
- PhonePad Server logs - logs Server processes.
- Pushover Module logs - logs Pushover errors.
- Server Trace Logs - used to determine system issues.
- Service Setup logs - logs installation and setup of services.
- Service Monitor logs - logs any activity performed by the Service Monitor service.
- SMS Module logs - logs any SMS errors.

Workstation Logs

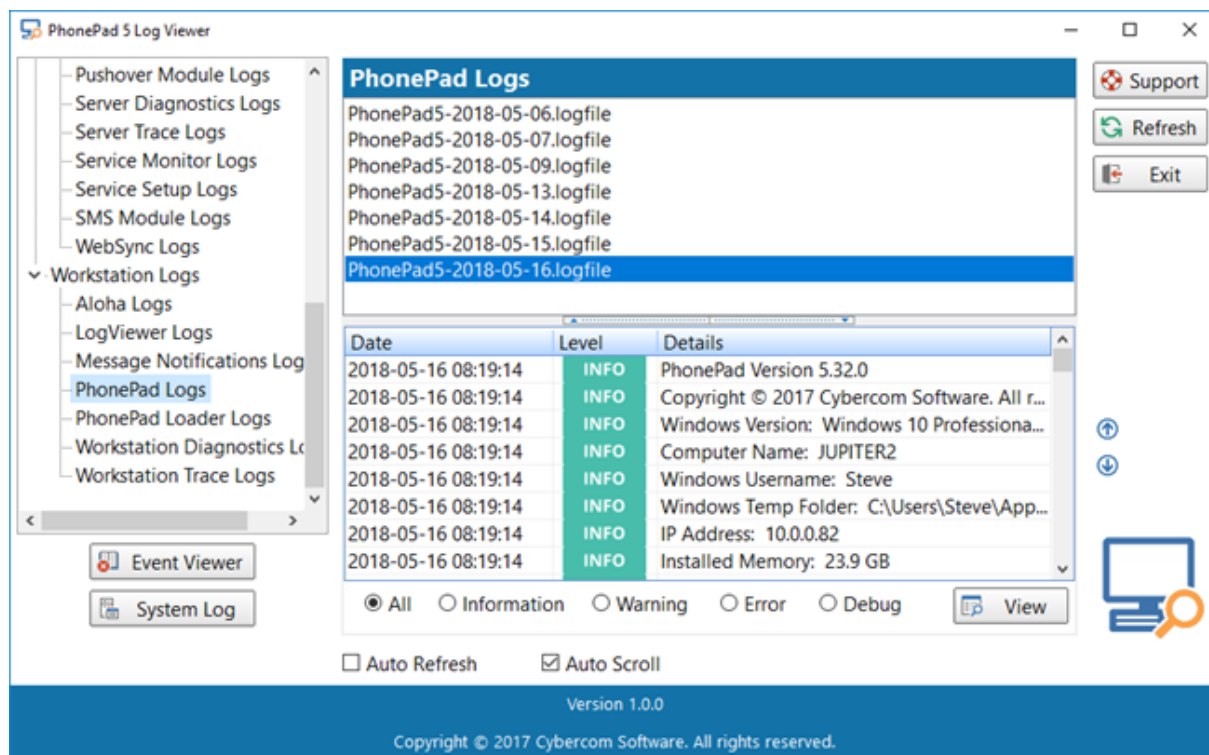
These are the logs generated on each workstation:

- Aloha logs - logs Auto Discovery requests and responses.
- LogViewer logs - logs any errors for the LogViewer application.
- Message Notification logs - logs notifications received from the Notification service.
- PhonePad logs - logs PhonePad processes but especially any error messages.
- PhonePad Loader logs - logs start up processes and workstation updates.

- Workstation Trace logs - used to determine issues between the workstation and database.

Log Viewer

The easiest way to view the log file is by using the **Log Viewer**. It knows where to find the various logs and display them.



To view logs:

1. Select the type of logs from the list on the left, eg. PhonePad Logs. They are grouped by Server and Workstation logs.
2. The available logs will appear in the top right list. There will be a log for each day a log file was created. The log names use the International date format, which is YYYY-MM-DD.
3. Select the log you want to view.
4. The contents of the selected log will appear in the view area at the lower right.

The up and down buttons can be used to jump to the beginning or end of the selected log.

There is a splitter bar between the log file list and the log contents. You can use this to re-size the viewing area.

Filtering Log Entries

You can filter log entries using these radio buttons:



All Shows all log entries.

Information Shows just the information entries, which are typically things like the time a service started, etc.

Warning Shows just the warning entries. These are problems that a service or application encountered that are not critical but that should be resolved.

Error Shows just the errors. These are the things we need to know about as they affect correct operation of the PhonePad system.

Debug Shows just debug entries. These can be useful in determining causes of problems.

The **View** button be used to view a log entry in a popup window. This is particularly useful where all of the details don't fit in the grid.

Event Viewer

Click the **Event Viewer** button to view the Windows Event Viewer application logs. This is the same as using the *Windows Event Viewer* except that it only shows logs relating to PhonePad. This saves having to scour through the Windows Event Viewer trying to find the relevant entries.

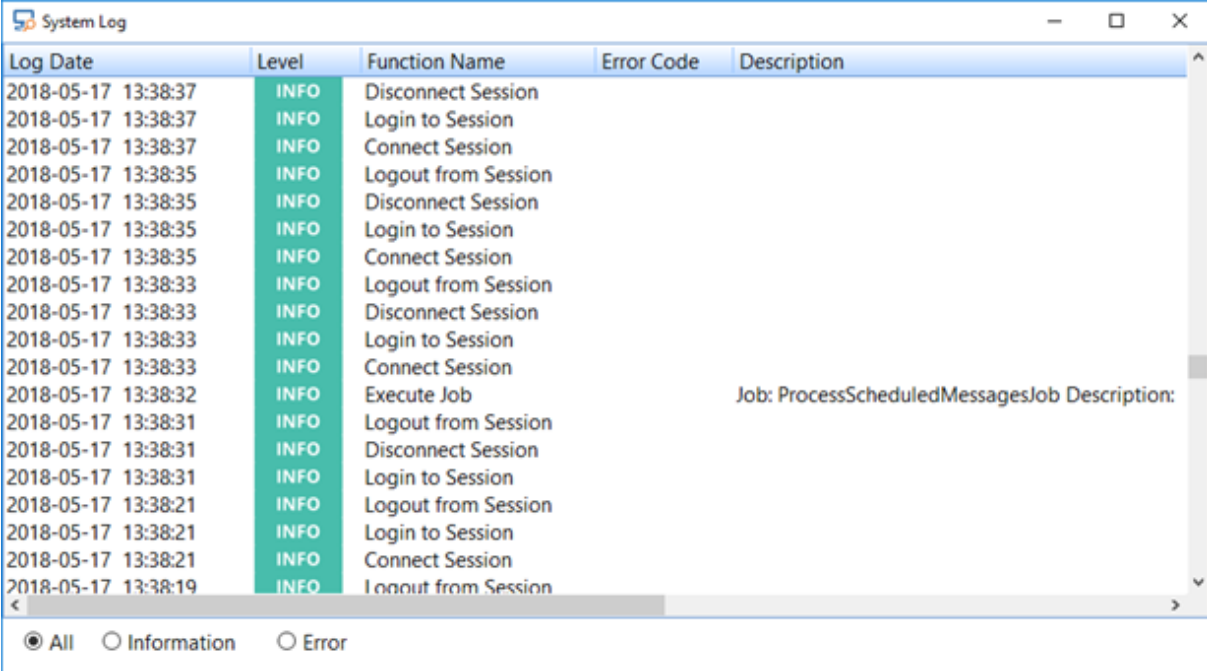
Event Log View

This window displays the Windows Event Log but only shows entries related to PhonePad 5.

	Date	Application	Event	Machine	Description
i	31/08/2017 5:47:31 PM	PhonePad5Server.exe	0	JUPITER2	Stopped
i	31/08/2017 5:46:57 PM	ServerAutoUpdate.exe	0	JUPITER2	Stopped
i	31/08/2017 5:46:54 PM	PhonePad5Server.exe	0	JUPITER2	Stopped
i	31/08/2017 5:21:05 PM	PhonePad5Server.exe	0	JUPITER2	Stopped
i	31/08/2017 5:20:31 PM	ServerAutoUpdate.exe	0	JUPITER2	Stopped
i	31/08/2017 5:20:28 PM	PhonePad5Server.exe	0	JUPITER2	Stopped
i	31/08/2017 1:50:11 PM	ServerAutoUpdate.exe	0	JUPITER2	Stopped
i	31/08/2017 1:50:09 PM	PhonePad5Server.exe	0	JUPITER2	Stopped
i	31/08/2017 9:27:04 AM	PhonePad5Server.exe	0	JUPITER2	Stopped
i	31/08/2017 9:26:34 AM	WebSync.exe	0	JUPITER2	Stopped
x	31/08/2017 9:26:34 AM	WebSync.exe	1	JUPITER2	ElevateDB Error #110
i	31/08/2017 9:26:29 AM	ServerAutoUpdate.exe	0	JUPITER2	Stopped
i	31/08/2017 9:26:27 AM	PhonePad5Server.exe	0	JUPITER2	Stopped
i	31/08/2017 7:45:33 AM	WebSync	0	JUPITER2	Extended handler is r
i	30/08/2017 2:37:32 PM	PhonePad5Server.exe	0	JUPITER2	Stopped
i	30/08/2017 2:36:57 PM	ServerAutoUpdate.exe	0	JUPITER2	Stopped
i	30/08/2017 2:36:54 PM	PhonePad5Server.exe	0	JUPITER2	Stopped
i	30/08/2017 2:03:25 PM	PhonePad5Server.exe	0	JUPITER2	Stopped

System Logs

Technically speaking all logs are system logs, however these logs relate specifically to the database engine and what's happening *inside*. Most of the time the system logs will just show Information log entries but occasionally it may contain Error log entries. In those situations these logs can be invaluable in tracking down a problem or bug that would otherwise be difficult to locate or even know that it exists.



Log Date	Level	Function Name	Error Code	Description
2018-05-17 13:38:37	INFO	Disconnect Session		
2018-05-17 13:38:37	INFO	Login to Session		
2018-05-17 13:38:37	INFO	Connect Session		
2018-05-17 13:38:35	INFO	Logout from Session		
2018-05-17 13:38:35	INFO	Disconnect Session		
2018-05-17 13:38:35	INFO	Login to Session		
2018-05-17 13:38:35	INFO	Connect Session		
2018-05-17 13:38:33	INFO	Logout from Session		
2018-05-17 13:38:33	INFO	Disconnect Session		
2018-05-17 13:38:33	INFO	Login to Session		
2018-05-17 13:38:33	INFO	Connect Session		
2018-05-17 13:38:32	INFO	Execute Job		Job: ProcessScheduledMessagesJob Description:
2018-05-17 13:38:31	INFO	Logout from Session		
2018-05-17 13:38:31	INFO	Disconnect Session		
2018-05-17 13:38:31	INFO	Login to Session		
2018-05-17 13:38:21	INFO	Logout from Session		
2018-05-17 13:38:21	INFO	Login to Session		
2018-05-17 13:38:21	INFO	Connect Session		
2018-05-17 13:38:19	INFO	Logout from Session		

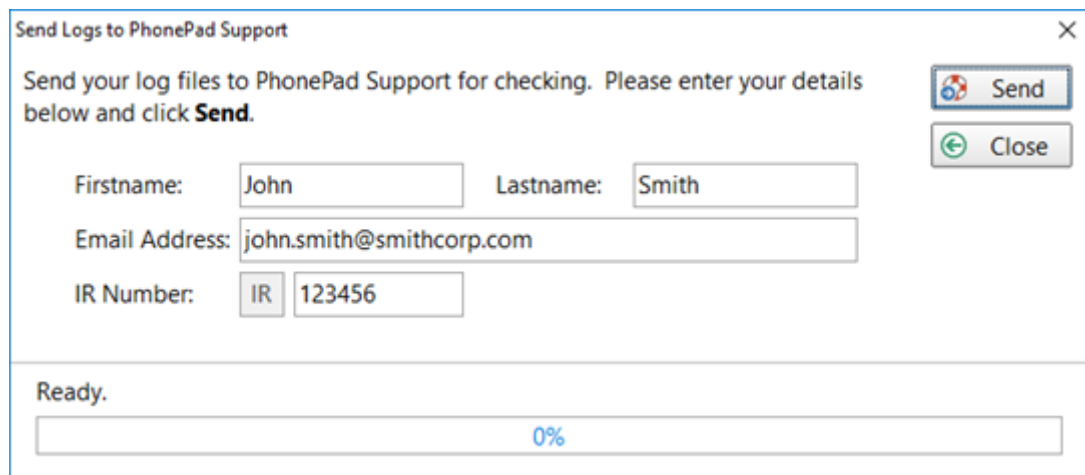
☒ All
 ☐ Information
 ☐ Error

Sending Your Log Files to PhonePad Support

If you have reported a problem with PhonePad to Cybercom Software Support, you may be asked to send your log files as these often contain important information about the issue you are experiencing.

The easiest way to do this is by following these steps:

1. Click the **Support** button in **Log Viewer**.
2. Enter your **Firstname** and **Lastname**.
3. Enter your **Email Address**.
4. Enter the **IR** (Incident Report) Number that would have been in the email reply (it's in the Subject line and also body of the email).
5. Click the **Send** button.
6. Log Viewer will collect the files and email them to Cybercom Software Support.



Send Logs to PhonePad Support

Send your log files to PhonePad Support for checking. Please enter your details below and click **Send**.

Firstname: Lastname:

Email Address:

IR Number:

Ready.



You can only view the Server logs if you are on the Server or Host PC. You can't view them from a workstation.



The logs never contain any database data. They only track certain system activity and error messages that may be useful for fixing issues that may occur.

I/O Error 103

If you get this error when starting or using PhonePad 5, it is a Windows permissions problem, ie. you don't have sufficient access rights to specific folders on your workstation.

PhonePad often needs to be able to write to these folders so that it can automatically install updates and record log events.

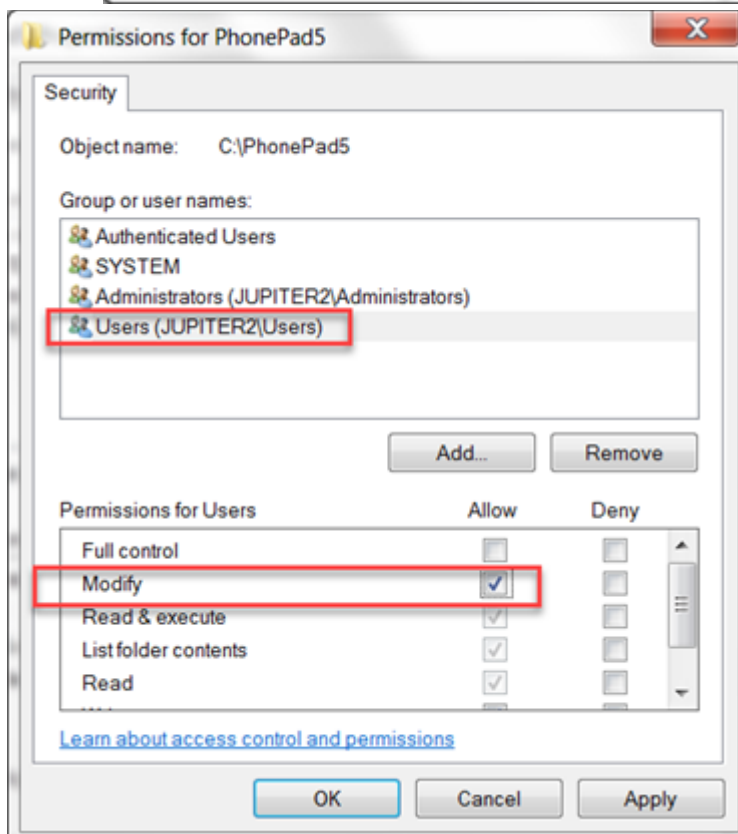
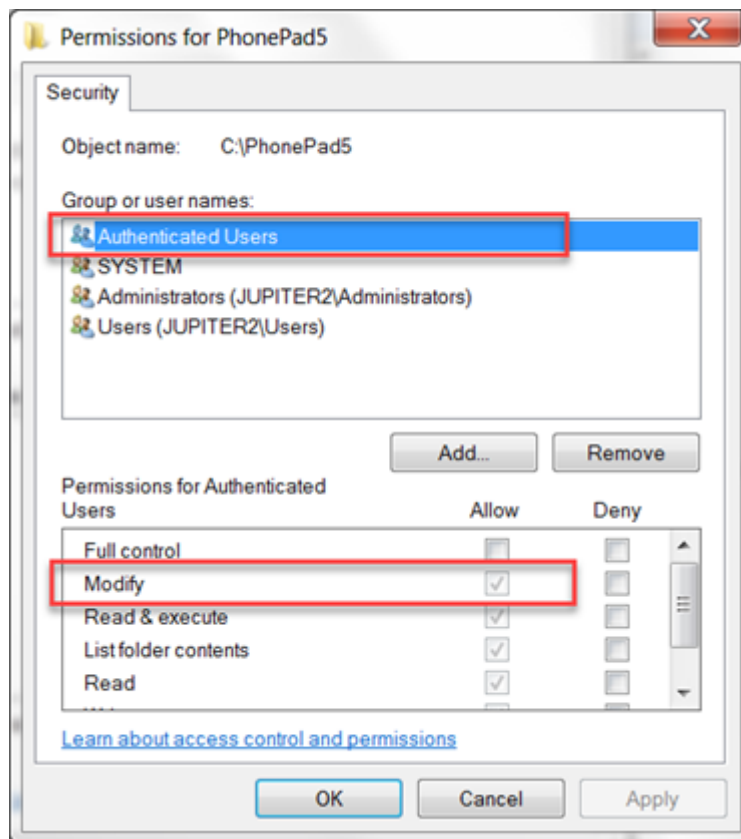
Fortunately this is easily fixed, although you will need to login as a Windows administrator on the workstations getting this error.

What you need to do is set the user permissions to at least **Modify** for the following folders:

- **C:\PhonePad5**
- **C:\ProgramData\Cybercom Software\PhonePad5**

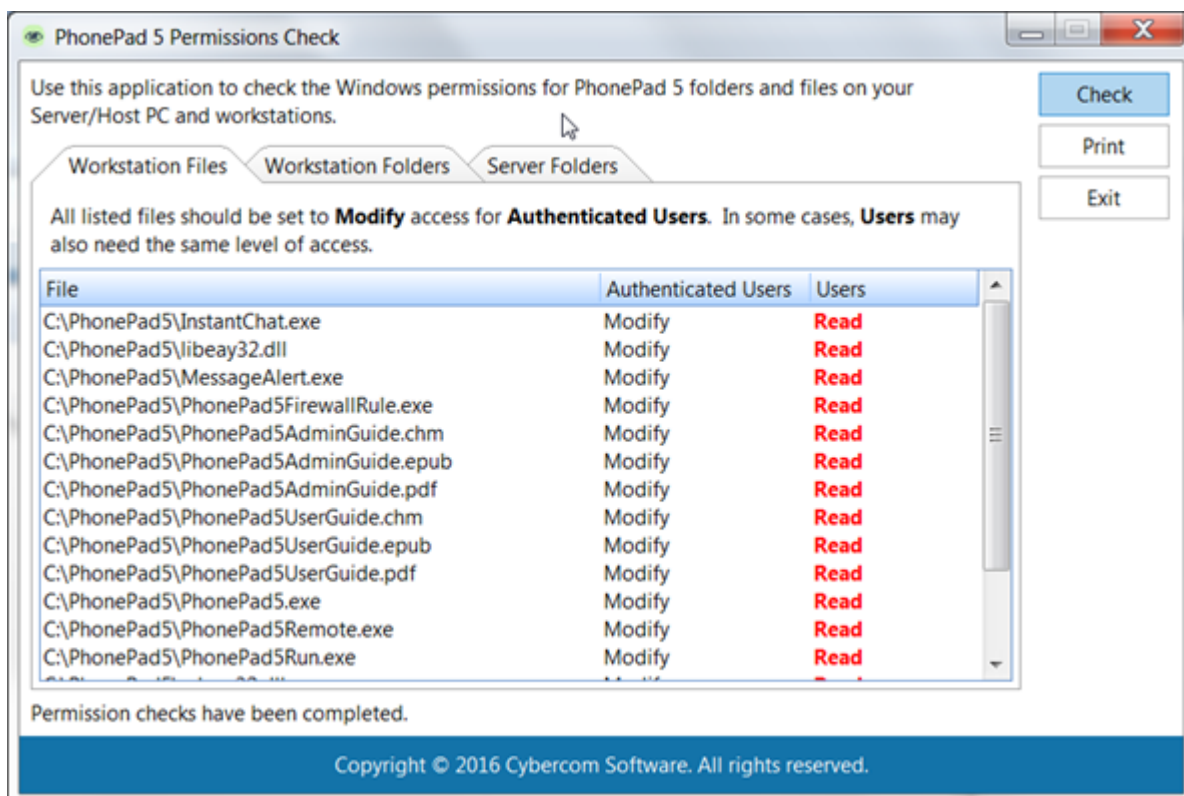
On many computers the **C:\ProgramData** folder is hidden by default by Windows. In that case you may need to type the path in on Windows Explorer's address bar.

These are the permissions that need to be set for both folders:



Checking Windows Permissions

You can easily check to see if your PhonePad folders and files have the correct permissions by downloading and running the **PermissionsCheck** application on your Server or Host PC, and your workstations.



Any potential access rights problems will be show in red.

You can download it here.

Speed Issues

If you're experiencing performance problems with PhonePad 5 then there are a number of things that can cause this. These will be discussed in this section.

Anti-Virus and Anti-Spyware Software

Anti-virus and anti-spyware can severely impact the performance of PhonePad 5. Read more about this in the section entitled Anti-Virus, Anti-Spyware and Other Security Software.

Network Connectivity

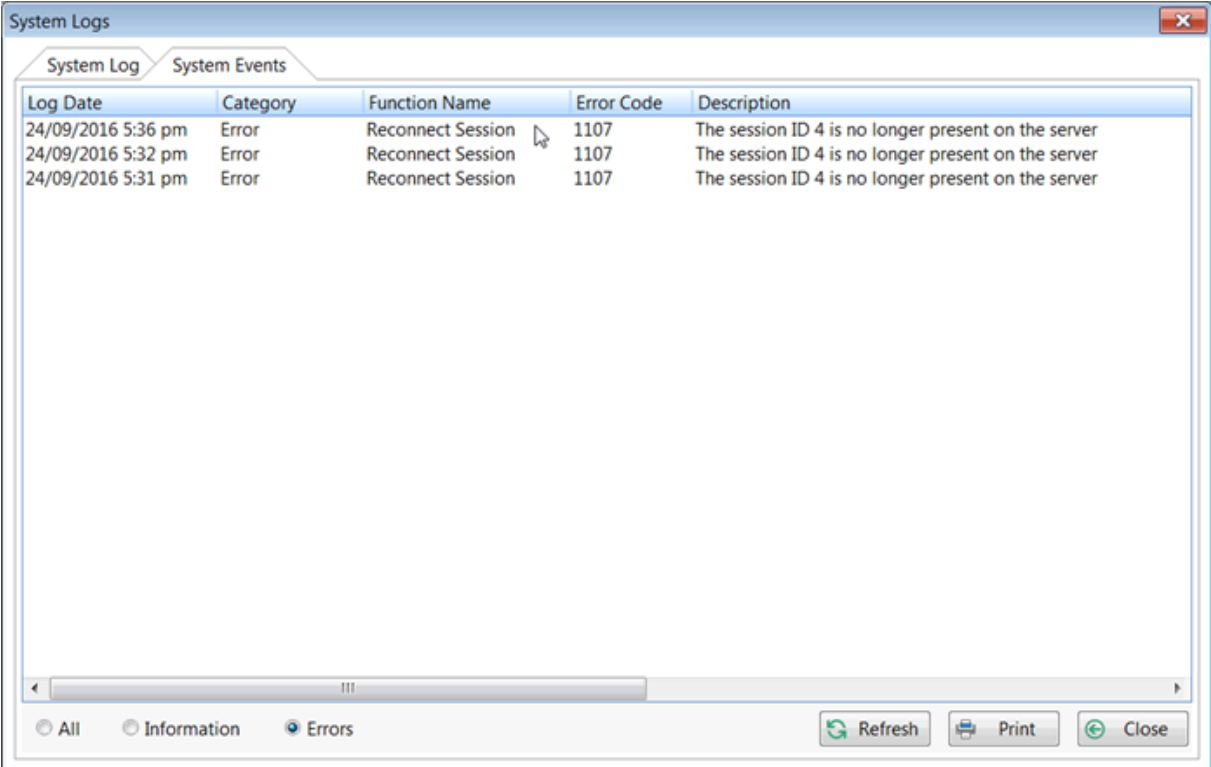
If your network experiences connectivity issues like dropouts, loss of data packets, etc. this can significantly impact performance.

Loss of data packets will cause the data has to be resent, and this will be repeated until the complete packets are received at the other end.

Connectivity drop outs will trigger PhonePad to attempt to re-establish the connection. This takes time. Frequent dropouts will definitely slow things down.

You can check if there have been connection problems:

1. Select **System Logs** from the **System Admin** menu,
2. Click the **System Events** tab.
3. The following example screenshot shows that there were some network problems that caused loss of connection between the workstation and server.



The screenshot shows a 'System Logs' window with two tabs: 'System Log' and 'System Events'. The 'System Log' tab is active, displaying a table of log entries. The table has five columns: 'Log Date', 'Category', 'Function Name', 'Error Code', and 'Description'. There are three entries, all categorized as 'Error' and labeled 'Reconnect Session' with error code '1107'. The descriptions for all three entries are 'The session ID 4 is no longer present on the server'. At the bottom of the window, there are radio buttons for 'All', 'Information', and 'Errors' (which is selected), and three buttons: 'Refresh', 'Print', and 'Close'.

Log Date	Category	Function Name	Error Code	Description
24/09/2016 5:36 pm	Error	Reconnect Session	1107	The session ID 4 is no longer present on the server
24/09/2016 5:32 pm	Error	Reconnect Session	1107	The session ID 4 is no longer present on the server
24/09/2016 5:31 pm	Error	Reconnect Session	1107	The session ID 4 is no longer present on the server

High Network Traffic

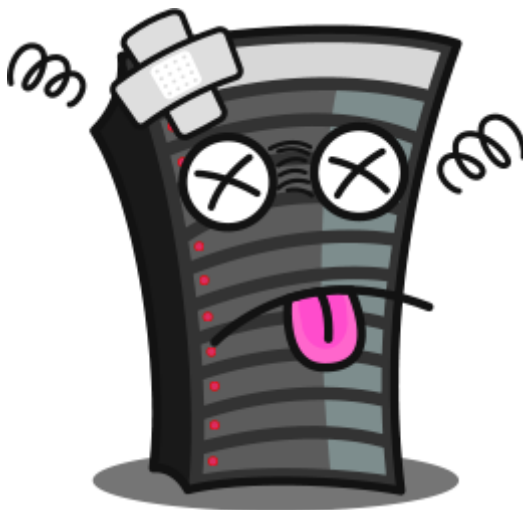
If your network is congested with activity this can also affect the speed of PhonePad. While you may be able to open documents over your network without much delay, keep in mind that PhonePad is a networked based data application that can access a lot of data within a short amount of time, so in some way it can be more sensitive to high levels of network traffic.



Heavy Server Load

An overworked Server can definitely affect the performance of any database-based system. A high number of users, high memory usage, and excessive disk activity can all reduce performance.

If you have a Host PC instead of a dedicated server, high amounts of processing on the Host PC can also affect the response time.



Speed Tests

You can easily check the response time between a workstation and the Server or Host PC using the Speed Test feature.

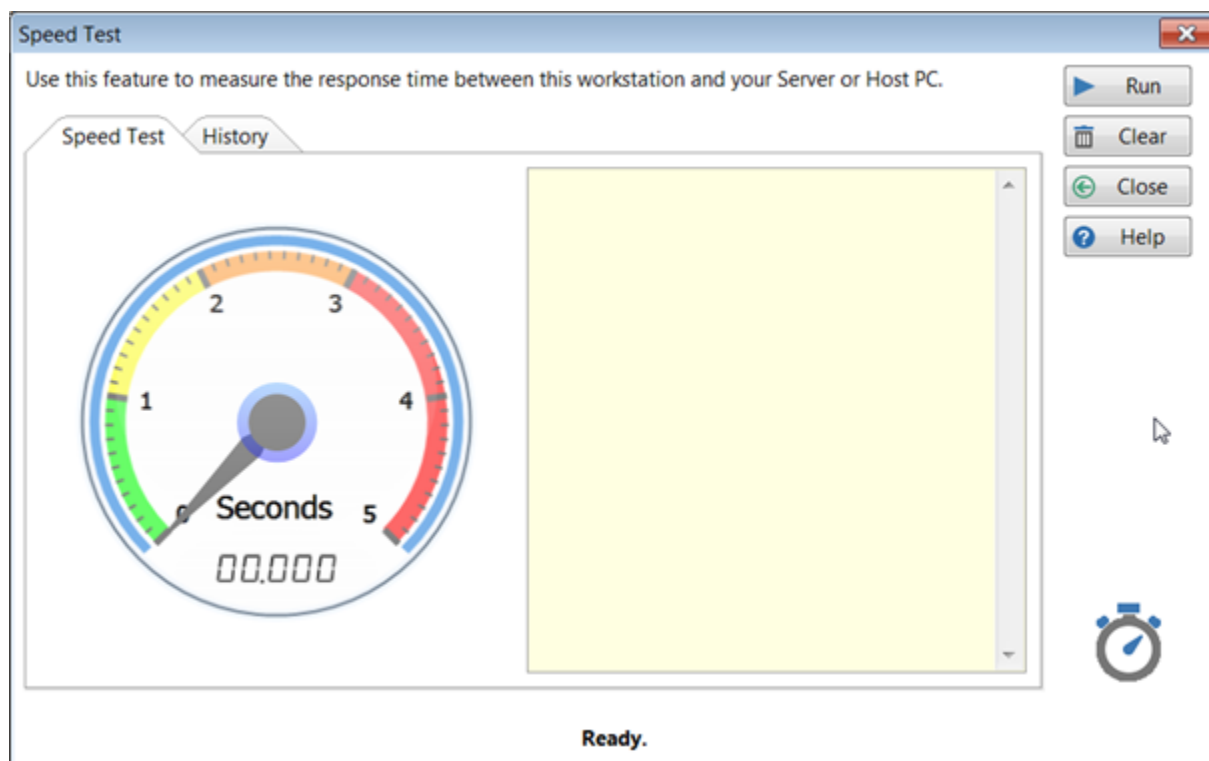
What Does the Speed Test Do?

The Speed Test measures the response time between a workstation and the PhonePad 5 Server. If you are experiencing performance issues with PhonePad this test can help to determine whether or not the delays are caused by the connection between your workstations and the server.

When you run the speed test it will send 100, 1000 and 10,000 records to the database, then read them back, and then delete them. When it does this it will measure how long each operation takes and then display the results on the screen.

Running the Speed Test

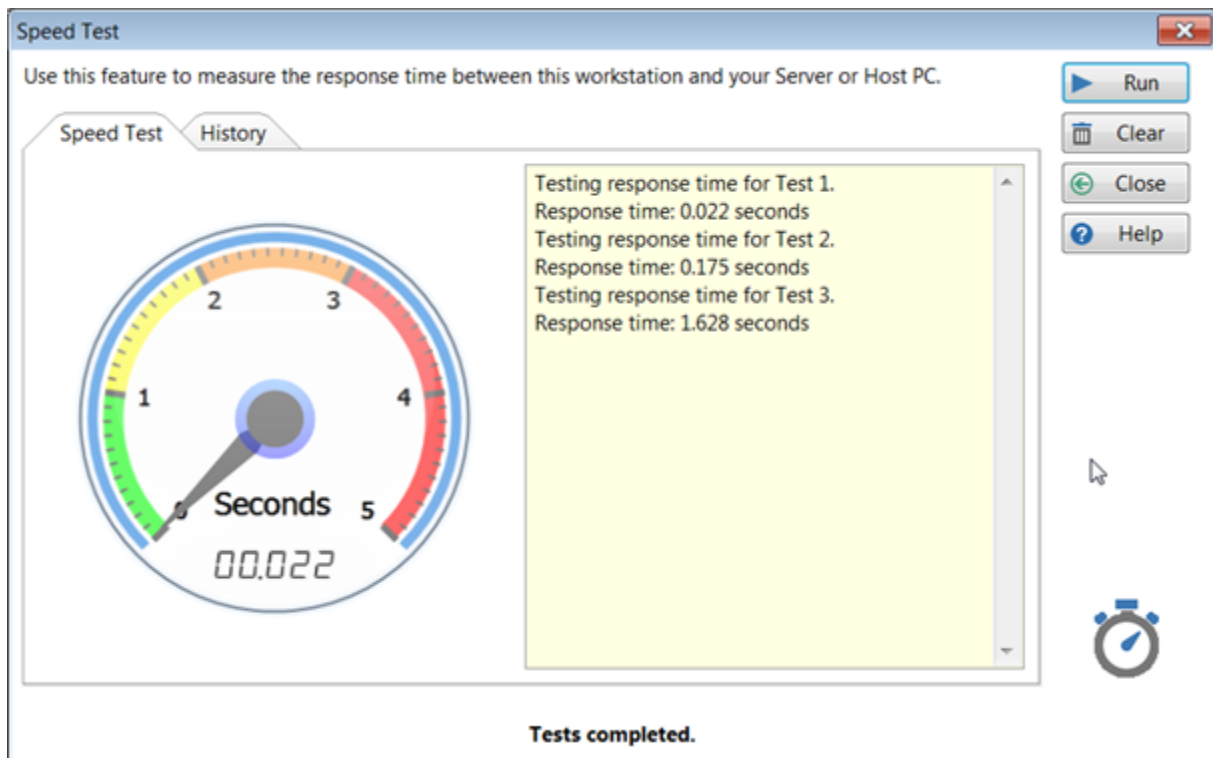
Select **Speed Test** from the **System Admin** menu, or click the **Speed Test** button on the **System Admin** toolbar.



To run the Speed Test, just click the **Run** button.

Speed Test Results

Once the testing has been completed the results will be displayed. The speed dial will show the results for **Test 1** (the 10-record test).



The response time for **Test 1** is the one should you focus on.

Interpreting the Results

The speed dial indicates how fast the server responded to the data requests.

Green Band 0 to 1 second Ideally the response time should be in the green band. In the example above the response time was 22 milliseconds or 0.022 of a second. This is a very good response time.

Yellow Band 1 to 2 seconds This is slow but still acceptable.

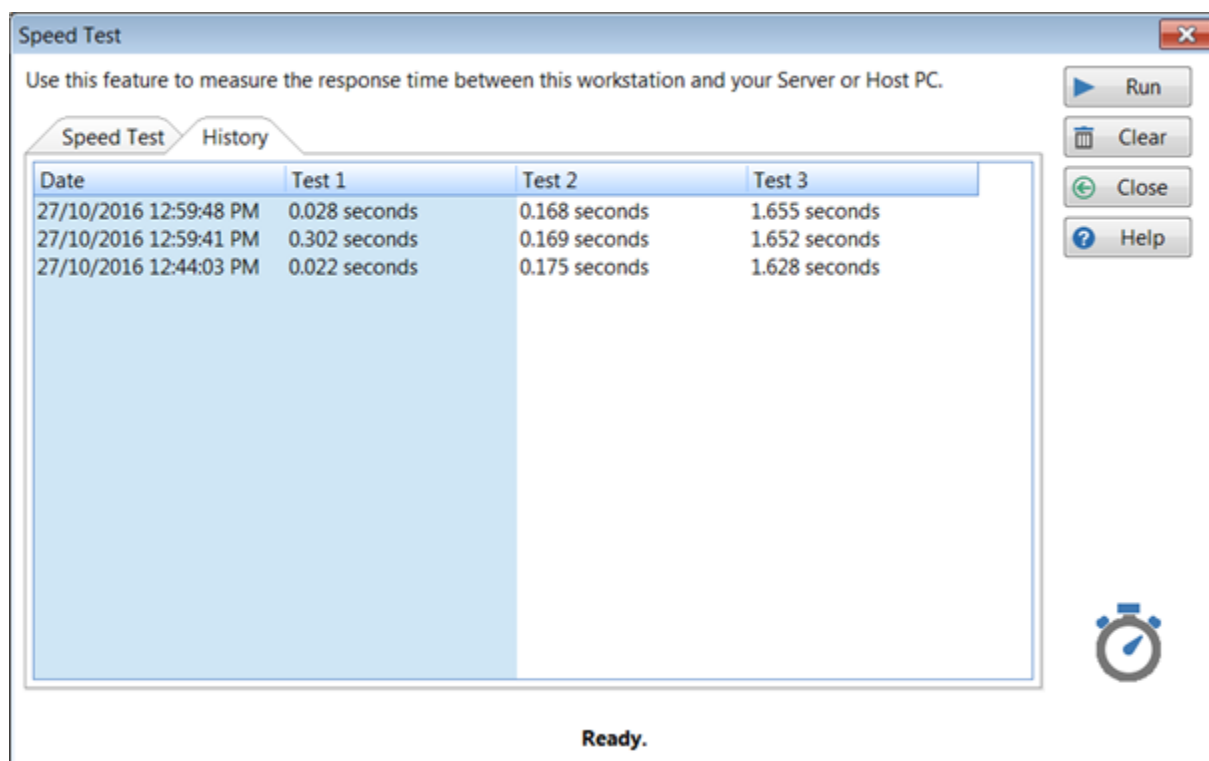
Orange Band 2 to 3 seconds This is too slow and it means there is a problem somewhere. The most likely causes are anti-virus real-time scanning on the Server (or Host PC), the Server is busy doing some serious number crunching, the network

		traffic is high, the server's hard-disk is severely fragmented or nearly full, etc.
Red Band	More than 3 seconds	This is extremely slow and there is definitely something bad going on and could be an indication of hardware issues.

If the test result you get is in the green zone then this pretty much shows that data communication between the workstation and the Server or Host PC is very good and that you should be looking elsewhere for causes of any performance issues you are experiencing. Putting it another way, whatever is causing performance issues is very likely something external to the PhonePad 5 system.

Speed Test History

The **History** tab shows a complete history of all speed tests that have been performed.



The important columns are **Date** and **Test 1** (which is why they are highlighted).

It's a good idea to retain this history so that you can monitor the response times over a period of days, weeks, month or even years. However you can delete these results at any time using the **Clear** button.

Multiple Servers

When You Don't Want Multiple Servers

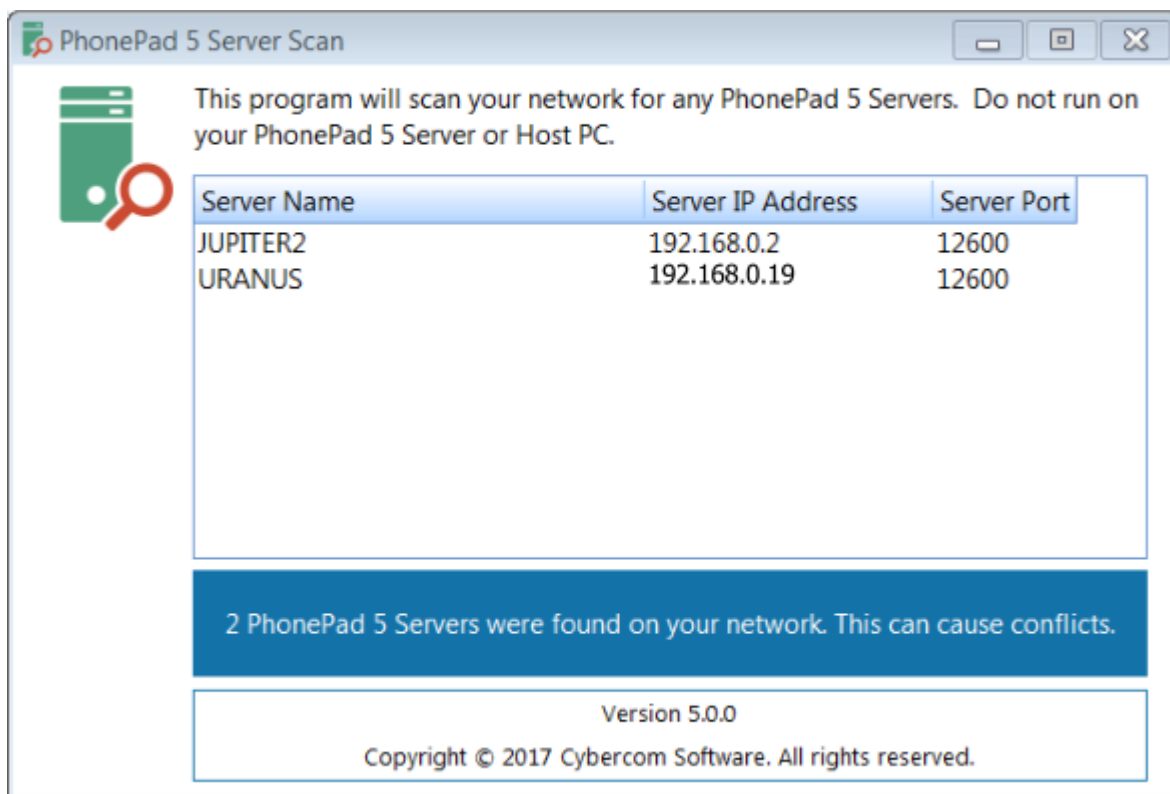
Installing multiple PhonePad 5 Servers on your network can cause unpredictable behavior. Workstations will connect to the first server that responds to a connection request. This means that you could end up with workstations connecting to different databases, resulting in messages not getting through and data inconsistencies.

The above scenario can happen when users mistakenly install the PhonePad 5 Server on more than one computer (there have been a few cases of this). The general rule is you should only have one PhonePad 5 Server on your network.

The following issues could be an indication that you have more than one PhonePad 5 Server on your network:

- You have installed a server update but one or more workstations still show the previous version number.
- Error messages state that one or more database elements are missing after a server update has been installed.
- Messages are not being received by the intended recipients.

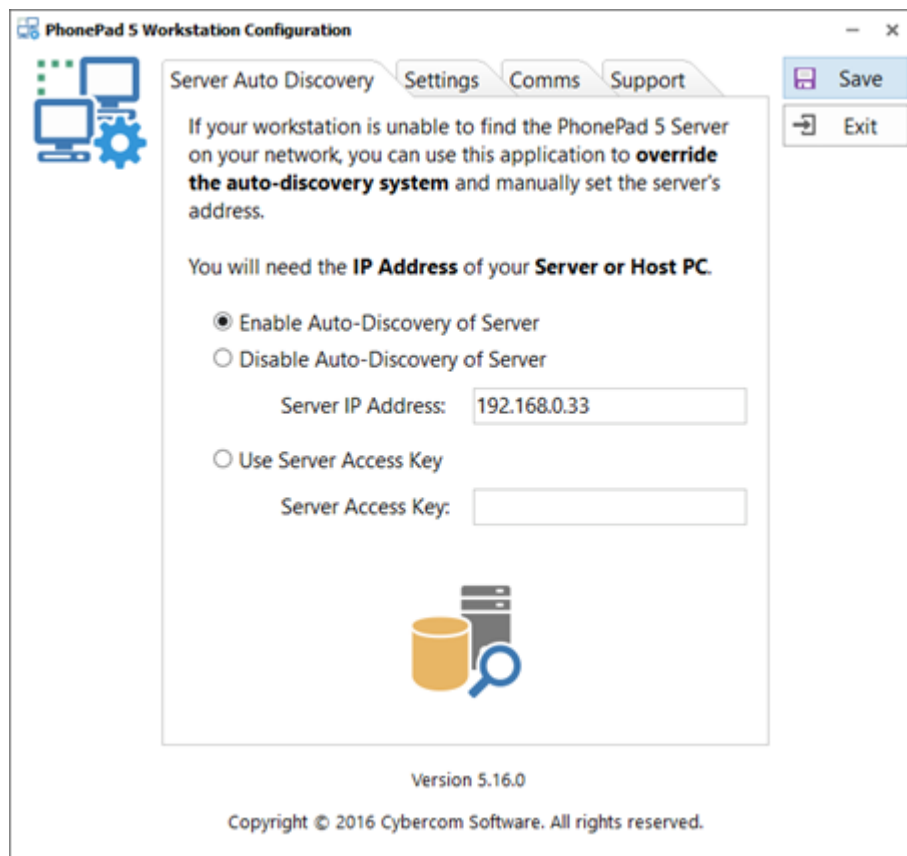
You can check to see if you have more than one PhonePad 5 Server on your network by downloading and running the ServerScan program. It will list all of the servers it discovers.



When You Do Want Multiple Servers

There are situations where having more than one PhonePad 5 Server is useful. For example, on a large network it may make sense to set up a separate PhonePad 5 database for each workarea/division/section, etc.

To avoid conflicts you will need to disable **Auto Discovery** on each workstation and enter the IP Address of the server you want PhonePad 5 Workstation to connect to. You can do this by running the **WorkstationConfig** program installed in the PhonePad 5 folder on each workstation.



Your options are to either use set the Server's IP Address or use a Server Access Key.

Chapter

17

Other Information

Other Information

Anti-Virus, Anti-Spyware and Other Security Software

Anti-Virus, Anti-Spyware and similar systems (which we'll collectively call Security Software), are the bane of database systems. They can literally bring a database server to its knees. Please read through the following sections so that you are aware of the issues and what can be done to fix them.



Real-Time Scanning

Security software usually has some form of real-time scanning which can **severely impact the performance** of database engines.

If you experience any of the following issues with PhonePad 5 then you can bet there is some type of security software performing real-time scanning:

- Slow response times
- Freezing
- Excessive CPU usage, especially on the Server or Host PC

Real-time scanning, which can also be known by other names like Real-Time Protection or Active Protection, scans files when you open or access them to make sure they don't contain any malicious content. That is fine for documents and some applications that are opened every now and then, but for database files which can be accessed multiple times per second this can significantly increase the amount of time it takes to process data.

Imagine a scenario where you are working on something important and someone interrupts you. Occasional interruptions may be okay but if that person interrupts you continuously then it would be pretty hard to get any work done.

The solution for real-time scanning is to either **exclude the PhonePad 5 Server folders from real-time scanning**, or **disable real-time scanning altogether on your Server or Host PC**.

Scheduled scans are generally not a problem, although you should avoid scanning the PhonePad 5 Server folders during working hours.

The solution for the pesky interrupter is up to you.

The folder you need to exclude on your Server or Host PC is **C:\ProgramData\Cybercom Software\PhonePad5Server**, and all sub-folders.

Firewalls

PhonePad 5 *automatically creates inbound and outbound exception rules in the Windows Firewall* so that the client software (PhonePad 5 Workstation) and the server software (PhonePad 5 Server) can communicate with each other.



The problem is a lot of security software also have their own firewall built-in, and in many cases these firewalls completely ignore the exception rules added to the Windows Firewall. This means that you may need to manually configure your security software's firewall to allow connections between PhonePad 5 Workstation and PhonePad 5 Server.

PhonePad Port Usage

Program	80	3520	12600	12601	12602	12603	12604	12605	15350
PhonePad5.exe	●		●						●
PhonePad5Remote.exe	●		●						
PhonePad5Run.exe	●		●	○	○			⊙	
PhonePad5Server.exe	●		●						●
AppointmentCalendar.exe	●		●	○	○				
CallerIDService.exe		⊙	●					□	
ControlCenter.exe	●		●						
Dashboard.exe			●						
InstantChat.exe			●						
MessageAlert.exe			●						
MessageSender6.exe			●						
WhereRU.exe			●						
WorkStationNotificationService.exe			●	○					

- Bi-Directional (Workstation and/or Server).
- ⊙ Inbound Only.
- Outbound Only.
- Local Port on Workstation only (Bi-Directional).

Notes

Port 80 is used for occasional communications between applications and backend services on our web server.

Port 3520 is used by CallerID.com devices (if you have one).

Port 12600 is the data communications port and is used for all communication between applications and your PhonePad Server.

Port 12601 is used by the notification service to notify PhonePad and Appointment Calendar of internal updates.

Port 12602 is used for inter-process communication between PhonePad and Appointment Calendar.

Port 12605 is used to receive Caller ID communications from [CallerID.com](https://www.callerid.com) devices.

Port 15350 is the server auto-discovery port used by our Aloha protocol.

Ports marked local are only used locally on the machine, ie. they are not used across your network.



Unfortunately we are unable to provide instructions for all security products - there are dozens of products available and their user interfaces are frequently updated. It is an impossible task for us to keep up to date with all of them and write instructions for them as well.

In addition to that, It is the security software company's responsibility to make sure that their products are compatible with other software, not the other way around.

However, we will try to provide instructions for some of the more popular security products where possible.

Server Configuration

The Control Center application on your Server or Host PC has a **Settings** button which allows you to change some of PhonePad 5 Server's default settings.

Server Settings

There shouldn't be a need to change any of these settings unless there is a port conflict with other software on your network. It's recommended that you leave these at the default settings.

If you do have to change any of the settings, you will also need to change the corresponding settings on all of your workstations using the Workstation Configuration program so that they match.

Server Settings

Server Settings Support Use Only

The **Override IP Address** field should be **blank**, unless you are overriding the Server or Host PC's IP Address.

The only time you should enter an IP Address in this field is if there are **multiple IP Addresses** on this machine and you want to specify which one PhonePad 5 Server should use.

Detected IP Address: 192.168.0.170 Add Override

Override IP Address: Delete Override

Server Port: 12600

Server Folder: C:\ProgramData\Cybercom Software\PhonePad5S

Server Access Key: hHzEffHGFBbb

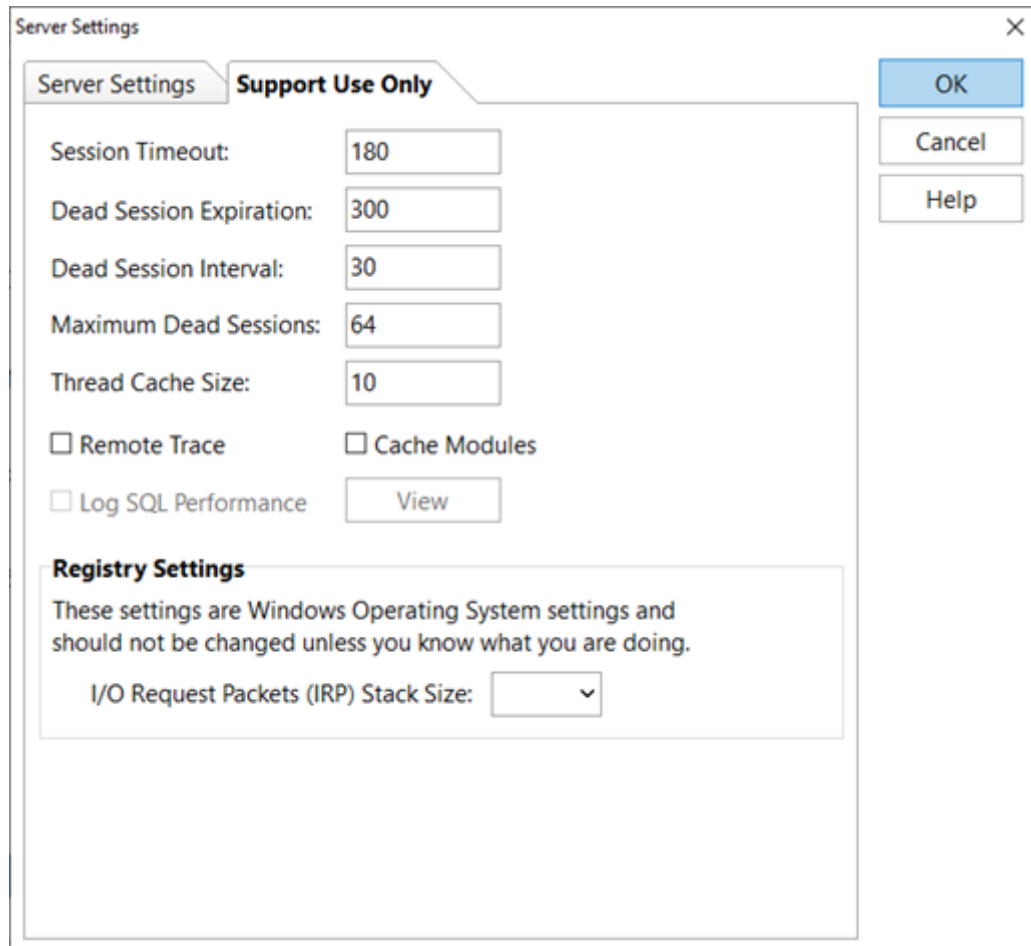
Register Deregister REGISTERED

☒ Activity Logs Performance Boost

OK Cancel Help

Support Use Only

These settings are used to tweak some of the system settings. Unless you are experiencing specific problems they should be left at their defaults.



The screenshot shows the 'Server Settings' dialog box with the 'Support Use Only' tab selected. The dialog has a title bar with a close button (X). On the right side, there are three buttons: 'OK' (highlighted in blue), 'Cancel', and 'Help'. The main content area is divided into two sections. The top section, 'Server Settings', contains several input fields: 'Session Timeout' (180), 'Dead Session Expiration' (300), 'Dead Session Interval' (30), 'Maximum Dead Sessions' (64), and 'Thread Cache Size' (10). Below these are two checkboxes, 'Remote Trace' and 'Cache Modules', both of which are unchecked. There is also a checkbox for 'Log SQL Performance' which is unchecked, and a 'View' button next to it. The bottom section, 'Registry Settings', contains a warning message: 'These settings are Windows Operating System settings and should not be changed unless you know what you are doing.' Below the warning is a dropdown menu for 'I/O Request Packets (IRP) Stack Size'.

The **Remote Trace** feature is used by Support to diagnose any issues you may be experiencing. If you have problems with PhonePad, a support technician may ask you to activate the Remote Trace for a short period. It should normally be left unchecked.

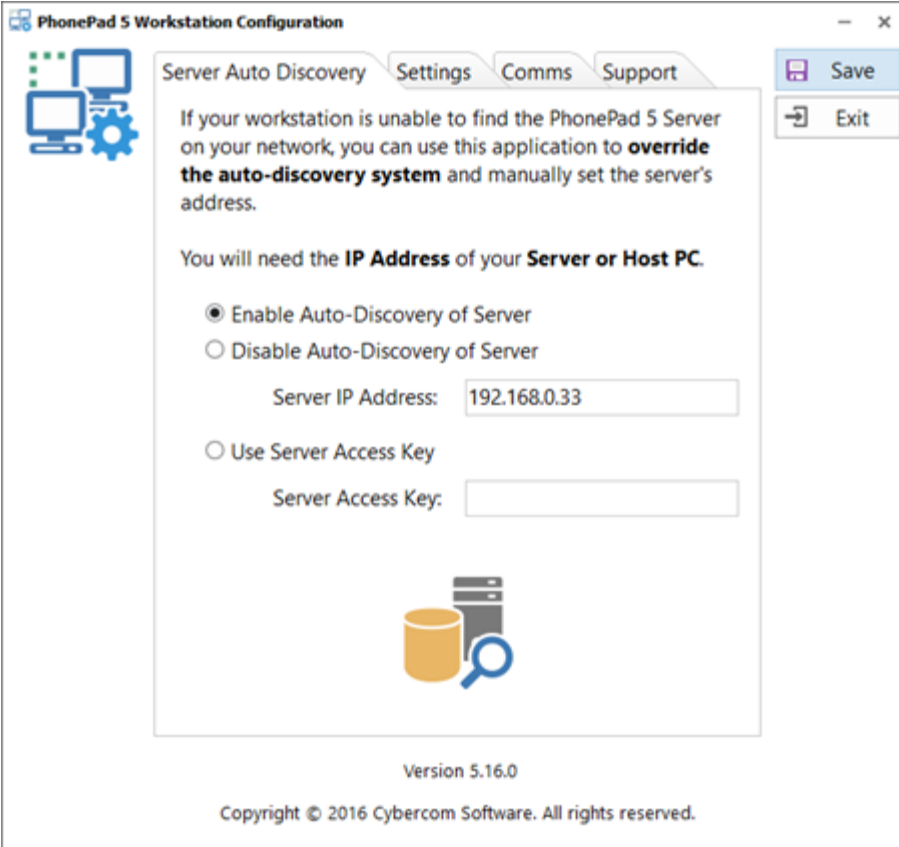
Workstation Configuration

The **Workstation Configuration** application is used to alter settings for individual workstations.

Server Auto Discovery

The Server Auto Discovery feature enables PhonePad 5 to automatically detect and connect with a PhonePad 5 Server on your network without you needing to enter the server's settings.

If Auto Discovery is blocked on your network by a router or other network device then you can override this feature and specify the Server's IP Address.



The image shows a screenshot of the 'PhonePad 5 Workstation Configuration' application window. The window has a title bar with the text 'PhonePad 5 Workstation Configuration' and standard window controls (minimize, maximize, close). Below the title bar is a navigation pane with four tabs: 'Server Auto Discovery' (selected), 'Settings', 'Comms', and 'Support'. To the left of the tabs is an icon representing a workstation with a monitor and a gear. To the right of the tabs are two buttons: 'Save' and 'Exit'. The main content area of the window contains the following text: 'If your workstation is unable to find the PhonePad 5 Server on your network, you can use this application to **override the auto-discovery system** and manually set the server's address.' Below this text is a line of text: 'You will need the **IP Address** of your **Server or Host PC**.' There are three radio button options: 'Enable Auto-Discovery of Server' (selected), 'Disable Auto-Discovery of Server', and 'Use Server Access Key'. Below the 'Enable Auto-Discovery of Server' option is a text field labeled 'Server IP Address:' containing the value '192.168.0.33'. Below the 'Use Server Access Key' option is a text field labeled 'Server Access Key:'. At the bottom of the main content area is an icon representing a server rack with a magnifying glass. Below the main content area is the text 'Version 5.16.0' and 'Copyright © 2016 Cybercom Software. All rights reserved.'

PhonePad 5 Workstation Configuration

Server Auto Discovery Settings Comms Support

If your workstation is unable to find the PhonePad 5 Server on your network, you can use this application to **override the auto-discovery system** and manually set the server's address.

You will need the **IP Address** of your **Server or Host PC**.

☒ Enable Auto-Discovery of Server
☐ Disable Auto-Discovery of Server
☐ Use Server Access Key

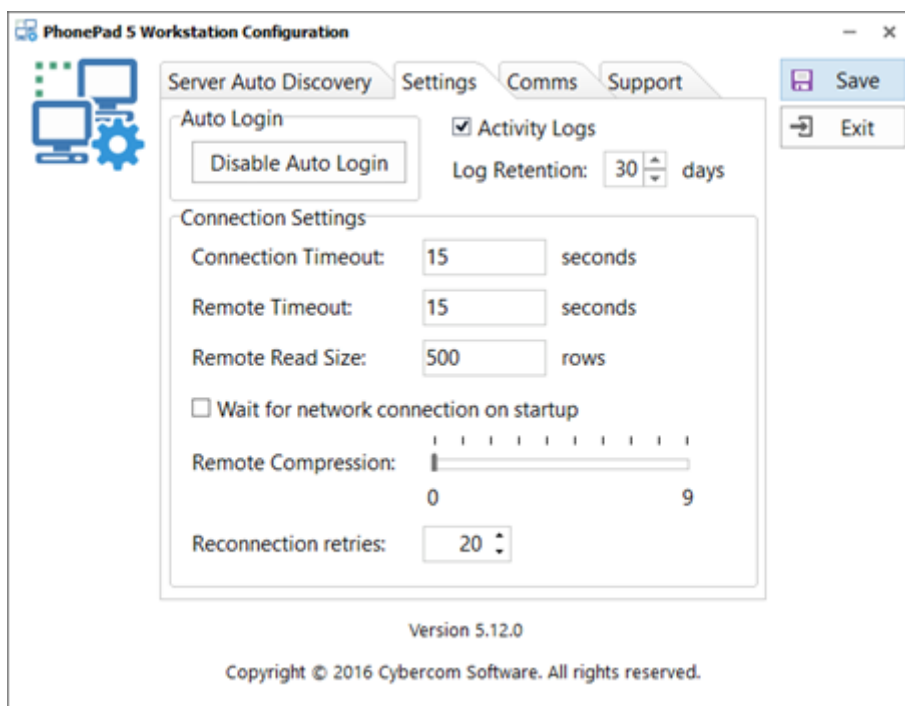
Server IP Address: 192.168.0.33

Server Access Key:

Version 5.16.0

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Settings

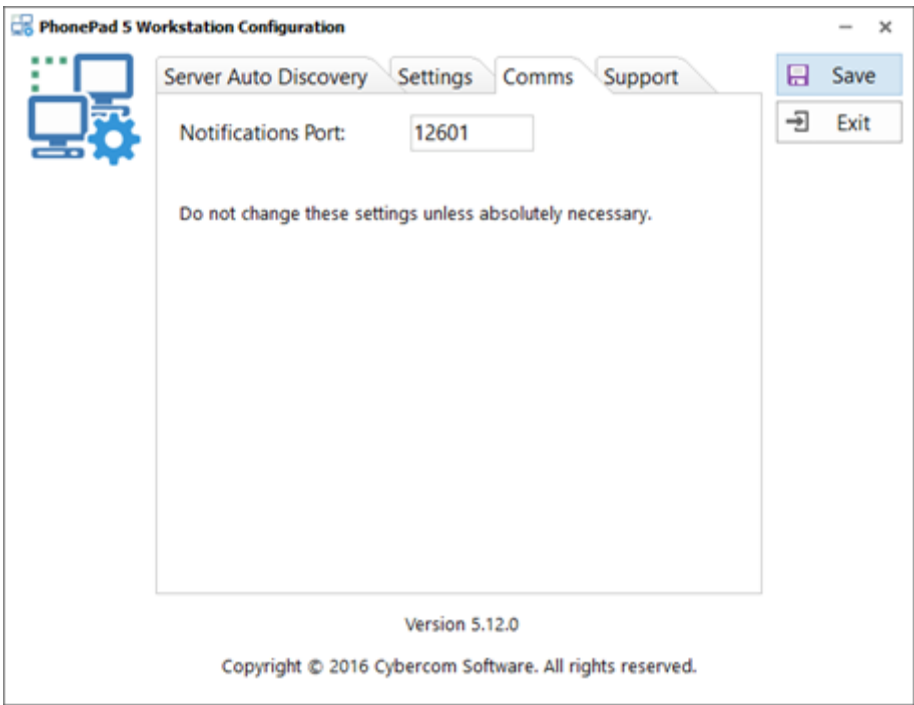


Disable Auto Login	<p>If your computer is set to Auto Login, you can temporarily disable it. Perhaps you have changed your username or password. By disabling Auto Login you will be able to login using your new account details which will then be remembered the next time you login.</p> <p>Click the <i>Disable Auto Login</i> button.</p>
Connection Timeout	Specifies how long PhonePad will wait for a response from the PhonePad Server when it is already connected.. The default is 15 seconds.
Remote Timeout	Specifies how long PhonePad will wait for a response from the PhonePad Server when attempting to establish a new connection. The default is 15 seconds.
Wait for Network Connection on Startup	If you have PhonePad set to start automatically when Windows starts, you may encounter situations where PhonePad is unable to connect to the server because the workstation hasn't yet established a connection to your network. If you check this checkbox,, on startup PhonePad will check for a network connection (either Ethernet or Wireless) and wait until there is a connection available before attempting to locate a PhonePad Server and connect to it..
Remote Trace	This should only be activated when requested by PhonePad Support as leaving it active for too long can affect PhonePad performance.

--	--

Comms

These default settings shouldn't need to be changed unless there are network conflicts on these ports.



Notifications Port	This is the port used for notification purposes, especially dynamic refresh. The default is 12601.
Communications Port	This is the port used for communications purposes. The default is 12602.
Broadcast Port	This is the port used for broadcast messages. The default is 12603.

Configuration Files

PhonePadLocalSettings.ini

PhonePadLocalSettings.ini is a configuration file located in *C:\ProgramData\Cybercom Software\PhonePad5* on computers that have PhonePad 5 Workstation installed.

The PhonePadLocalSettings.ini file contains:

- Username and password (encrypted) for automatic login. These are managed by PhonePad.
- Connection override settings.
- Debug settings.
- Temporary folder setting.

[Login]	Automatic login settings
Username	The username.
Password	Encrypted password.
[Settings]	
ServerOverride	0 = Automatic server detection. 1 = Disables server detection and uses manual settings.
RemoteTrace	Used for debugging purposes by Cybercom Software Support. Do not enable unless advised as this can severely impact performance. 0 = Remote Trace is off. 1 = Remote Trace is on.
TempFolder	If set it overrides the default Windows temp folder setting, eg. C:\Windows\Temp.
[Server]	
ServerIP	IP Address of the Server or Host PC. Only used when ServerOverride = 1.
ServerPort	TCP Port of the Server or Host PC. Only used when ServerOverride = 1.

Example:

```
[Login]
Username=Jane
Password=mTuo+JSTUfAXiwmpOSPL4PYC
```

```
[Settings]
ServerOverride=1
RemoteTrace=0
TempFolder=C:\MyTemp
```

```
[Server]
```

ServerIP=192.168.0.100

Editing PhonePadLocalSettings.Ini

Application Folders

By default, PhonePad 5 Workstation and PhonePad 5 Server are installed in the following folders:

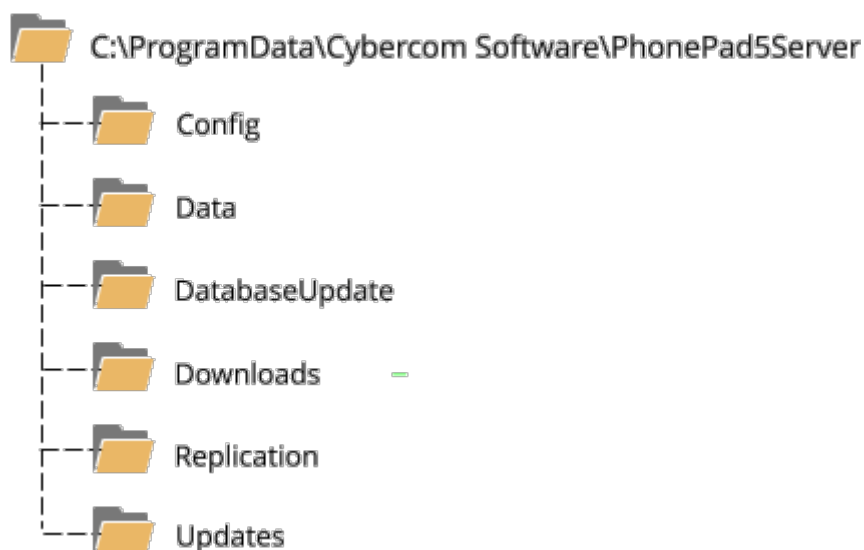
- C:\PhonePad5
- C:\PhonePad5Server

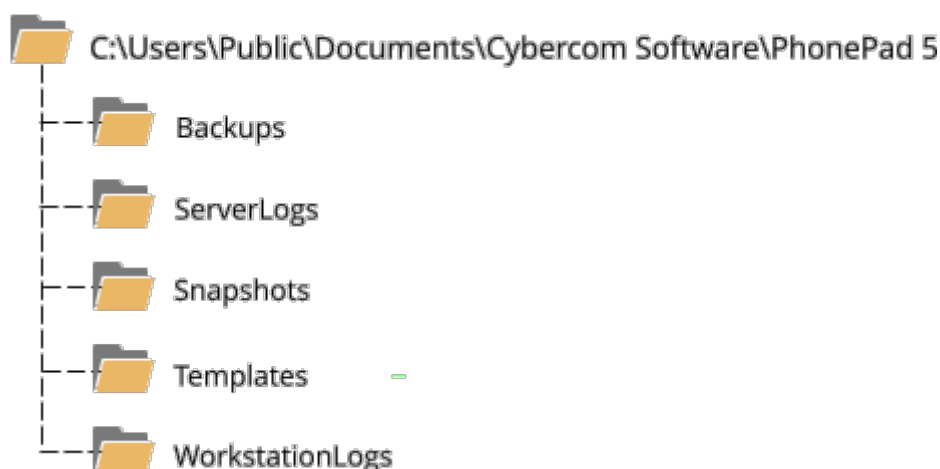
Now you may be wondering why they aren't installed under C:\Program Files or C:\Program Files (x86). The reason is that the Program Files folders are special folders that are normally tightly controlled by the Windows OS and User Access Control (UAC). We have found that installing PhonePad in those folders breaks the automatic update system due to overly restrictive access rights.

These restrictions don't normally apply to other folders directly off the C: drive root directory (but sometimes they might). We recommend that users be given **Modify** access to the **C:\PhonePad5** and **C:\PhonePad5Server** folders, or whichever folders to put them in.

PhonePad 5 Server Folders

PhonePad 5 Server uses the following folder structure on your Server or Host PC.





These folders are maintained by PhonePad 5 Server and should never be modified or deleted. It is strongly recommended that you give Server or Host PC users **Modify** access to these folders.

AlohaLogs	These logs are created and maintained by PhonePad 5's auto-discovery system.
Backups	This is where PhonePad stores the automatic and manual backups. If you want to backup your PhonePad backups using backup software then back up this folder.
Config	This folder contains important configuration files used by PhonePad 5 Server.
Data	This is where your actual PhonePad 5 data is stored.
DatabaseUpdate	This folder contains files used by DataUpdate to update your copy of PhonePad.
Downloads	This folder is used during update processes.
Replication	This folder will support data synchronization and replication when this feature is added to PhonePad 5.
ServerLogs	PhonePad 5 Server keeps its logs in this folder. These logs are often used by support staff to diagnose and resolve issues.
SystemBackups	Important configuration files are automatically backed up to this folder by PhonePad 5 Server.
Updates	This folder is used to update files on your workstations.

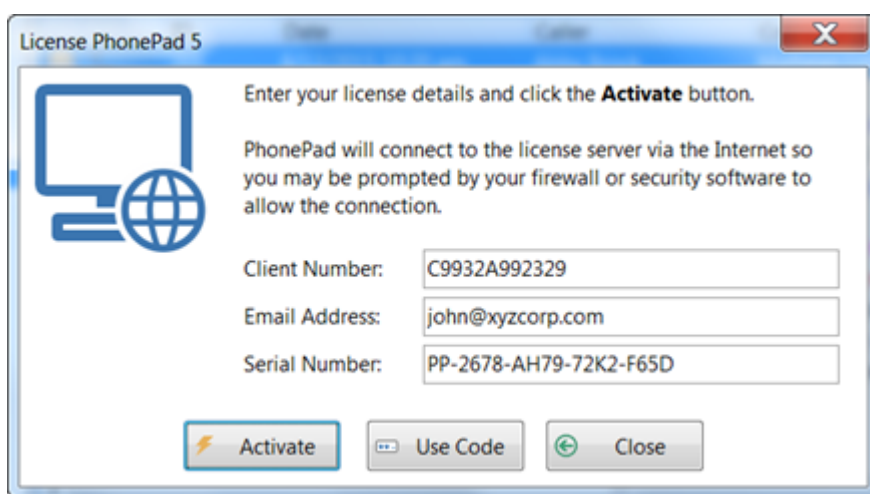
Purchasing PhonePad

To purchase PhonePad, select **Purchase** from the **Help** menu. You will be taken to the Cybercom Software order page where you can purchase PhonePad.

Licensing PhonePad

When you purchase PhonePad you will receive an email containing your **Client Number**, **Email Address** and **Serial Number**. These details are used to license your PhonePad system.

Select **License** from the **Help** menu.



Enter your license details in the relevant fields as shown above, then click the **Activate** button. PhonePad will connect to our license server to download and install your license. If you are unable to connect you may need to configure your firewall or security software to allow the connection.

Please note: licensing only needs to be performed once. You do **not** need to do this on each workstation.

If You Are Unable to Connect to the Internet

If your computer is unable to connect to the Internet then there is an alternative method of licensing PhonePad.

Click the **Use Code** button.

License Code

If you are unable to access the license server due to security restrictions on this computer, or if this computer doesn't have Internet access, you can have a special license code sent to you by email.

- Enter your **Serial Number** and click the **Create Code** button.

Serial Number:

- Click the **Copy Code** button and paste the text into a document you can access from another computer. Go to the following website on another computer, then paste the text you copied in the space provided.

```
<---begin--->PHNlcmIhbF9udW1iZXI
+UFAtMjY3OC1BSDc5LTcySzltRjY1RDwvc2VyaWFsX251bWJlcj
48dWRpPjBCQ0EyN0FCLUMzMTQtNENBNC05Mzk2LTICREFEN
DbxQ0YwNjwvdWRpPjx2YWxpZGF0aW9uX2NvZGU
```

<http://www.cybercom-software.com/licensecoderequest>

- Copy the license code from the email you receive and paste it here.

- Click the **Activate** button.

1. Enter your **Serial Number**.
2. Click the **Create Code** button. A special code will be created.
3. Click the **Copy Code** button and paste it into a document that you will be able to access on a computer that has email access.
4. Go to this web address: <http://www.cybercom-software.com/licensecoderequest/licensecoderequest.html>
5. Paste the code into the space provided on the website.
6. Click the **Request** button.
7. A special code will be emailed to your license email address.
8. Copy the code from the email and paste it into the field above, or copy the code to the Windows clipboard and click the **Paste License Code** button.
9. Click the **Activate** button to activate your license.

PhonePad Home Page

Select **PhonePad Home Page** from the **Help** menu to go to the PhonePad home page on the Cybercom Software website.

Latest News

Select **Latest News** from the **Help** menu to go to the News/Blog page on the Cybercom Software website.

License Information

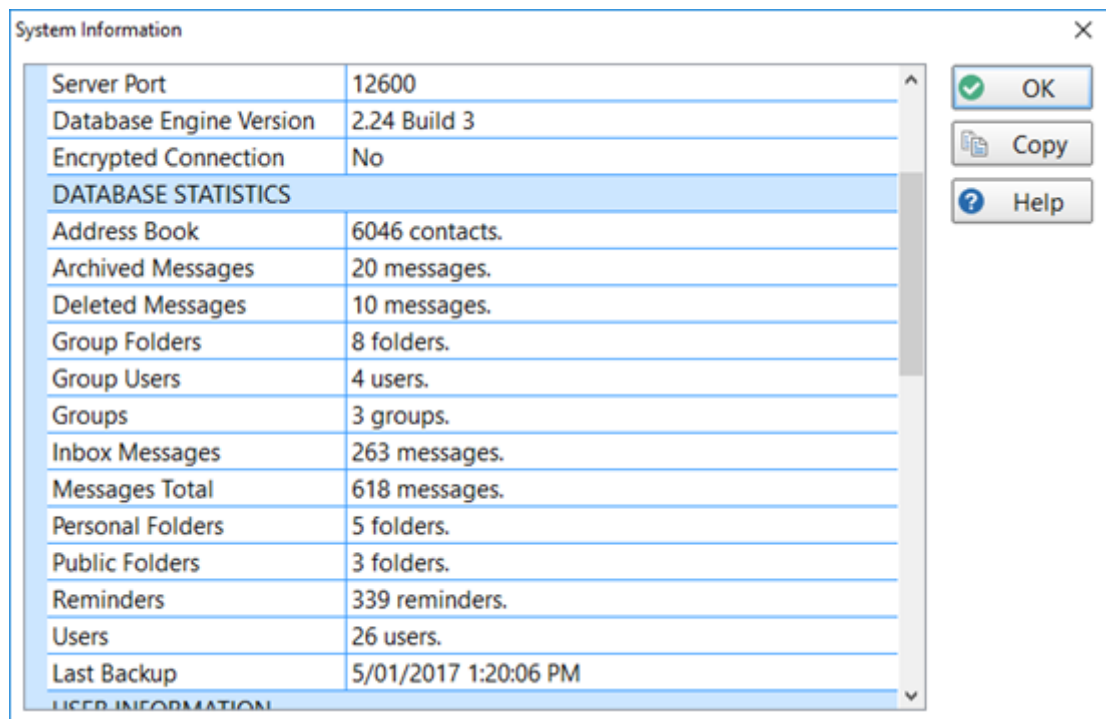
Select **Your License Information** from the **Help** menu.



System Information

The System Information windows displays information that can be useful for support staff trying to diagnose an issue.

Select **System Information** from the **Help** menu.



You can click the **Copy** button to copy these details to the Windows clipboard.

System Information displays:

- Application information
- Database information
- Database Statistics
- User Information
- License Details
- System information
- Anti-virus, anti-spyware and firewall software details

Suggestions

We love to receive suggestions, enhancement requests and other feedback from our customers. It helps us improve our software and ensures that PhonePad continues to meet your needs.

You can send us your ideas by selecting **Suggestions** from the **Help** menu. Your browser will open to our Suggestions web page.

Chapter

18

Support

Support

We have been supporting our products for over 20 years.

If you have any problems with downloading, installing, configuring or using PhonePad 5 **please contact us instead of your normal IT support provider**. As good as your IT people are, we know PhonePad better and can probably pinpoint the problem and fix it a lot faster.

Please visit the **Support** page for information on support options: <https://www.cybercom-software.com/support.htm>



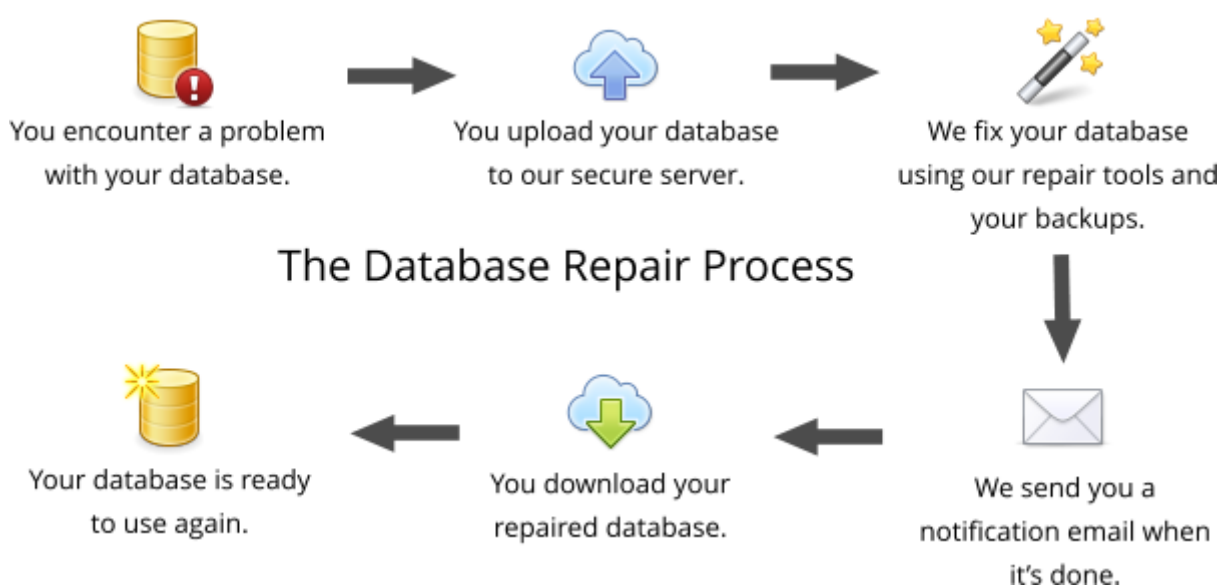
Getting Us to Repair Your Database

If you are experiencing problems with your PhonePad 5 database, especially error messages, and you have tried repairing it and restoring from backup then it might be time to call in the big guns.

Send an email to support@cybercom-software.com explaining the problem. Include any error messages. We will most likely get you to download a program that will upload your database to a secure area on your server.

The setup program will install two programs:

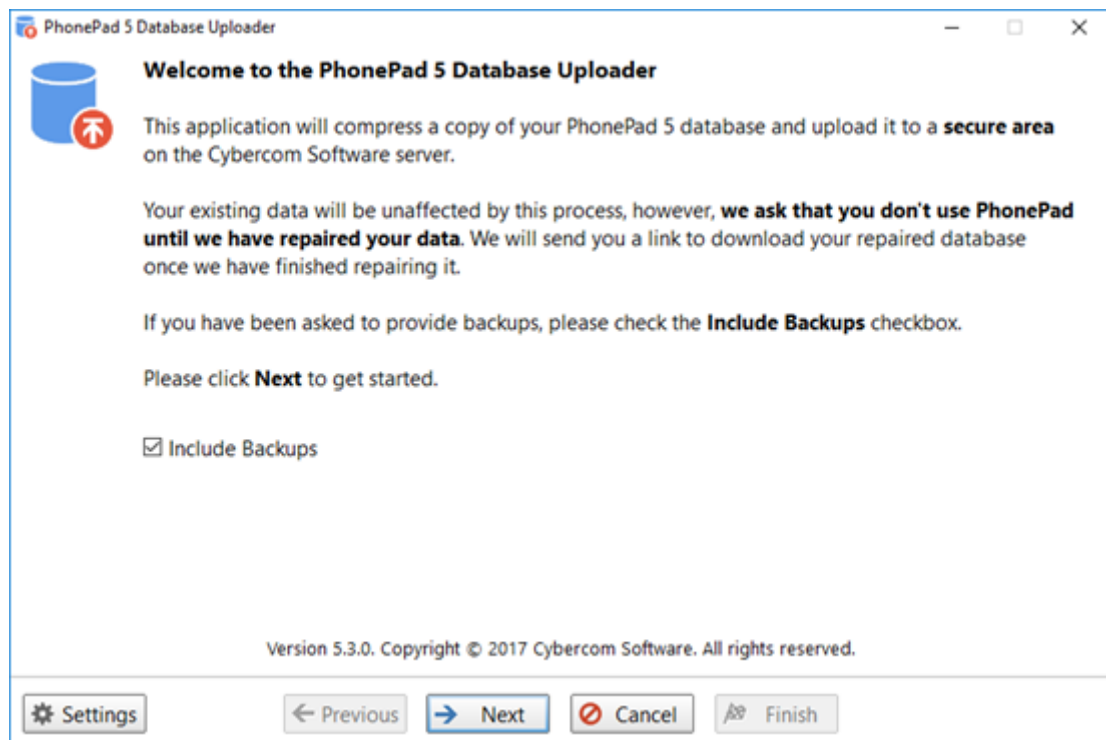
- **Database Upload** - this is used to upload your database for repair.
- **Database Download** - this is used to download and install your repaired database.



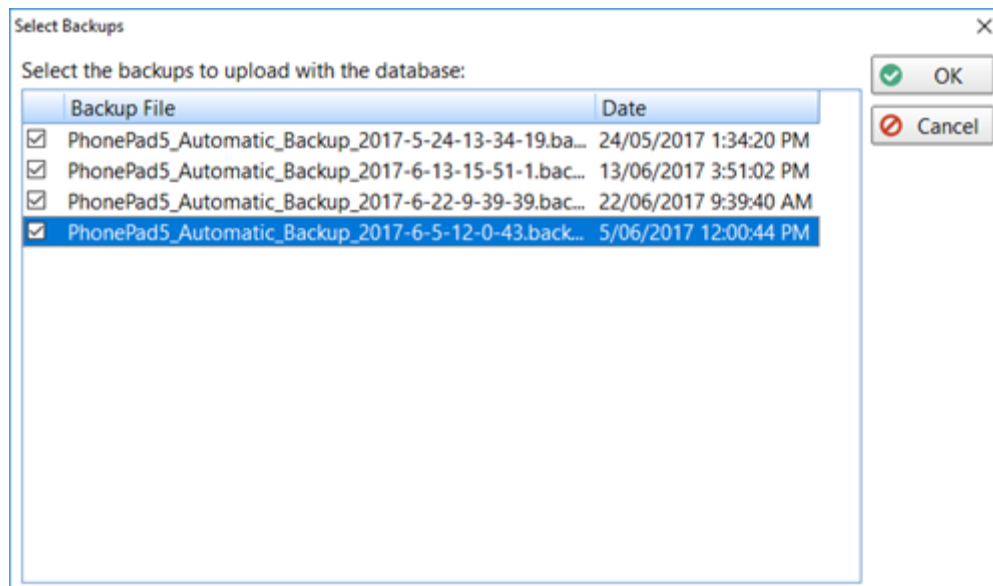
Uploading Your Database for Repair

Before we can repair your database you will need to upload it to our secure server. Due to the specialized nature of this type of repair it's not possible for us to do this over-the-phone or by remote support.

1. Run **Database Upload** by right-clicking on the icon and selecting **Run as Administrator** from the popup menu.

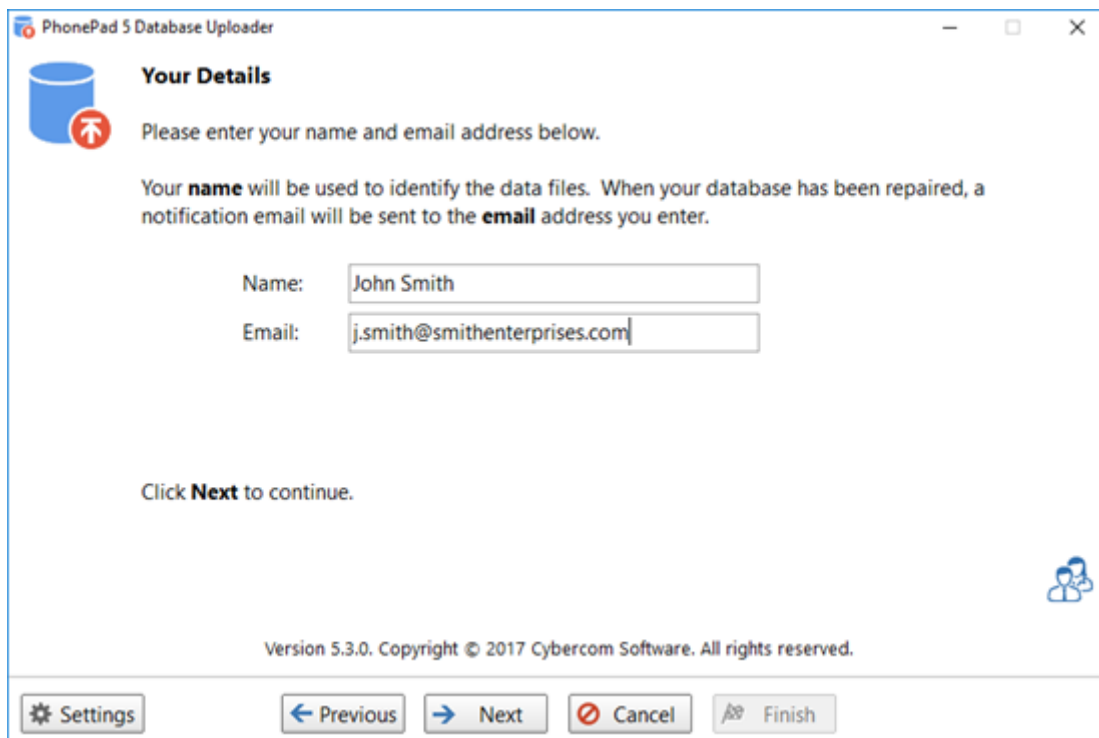


2. Make sure the **Include Backups** check box is *checked* before clicking **Next**.
3. You will be prompted to select some recent backups.



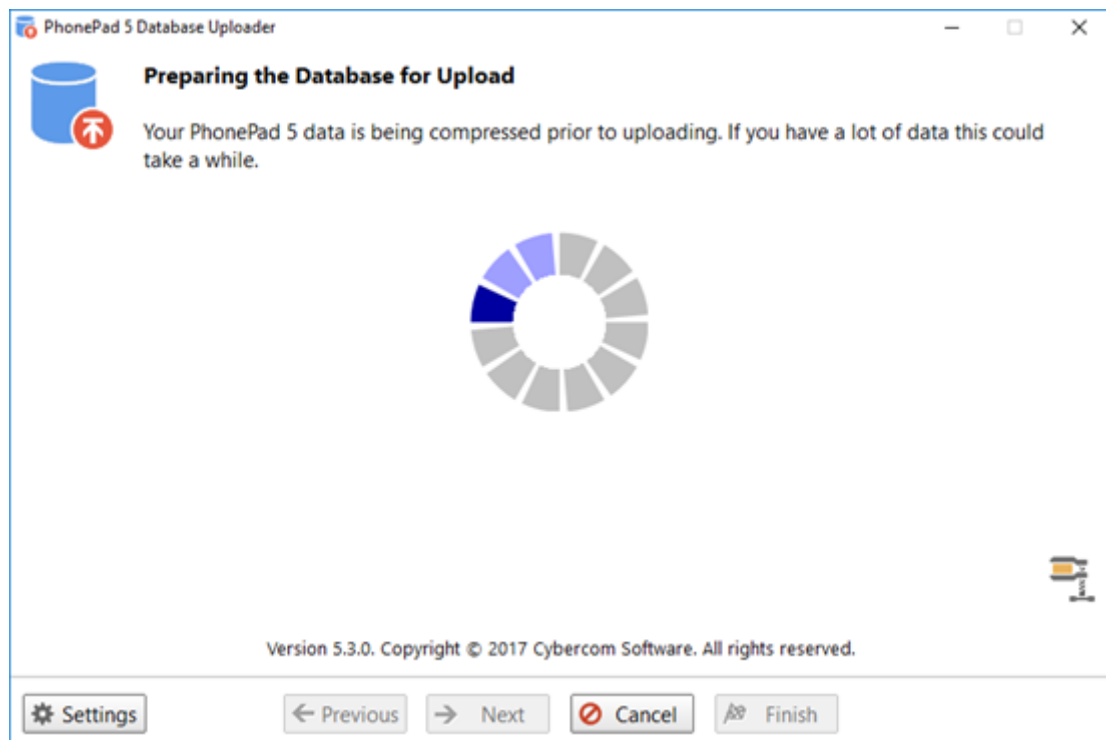
4. It is recommended that you select at least a week's worth, starting with the latest backup.
5. Click **OK** to continue.

6. Enter your **Name** and **Email** address.

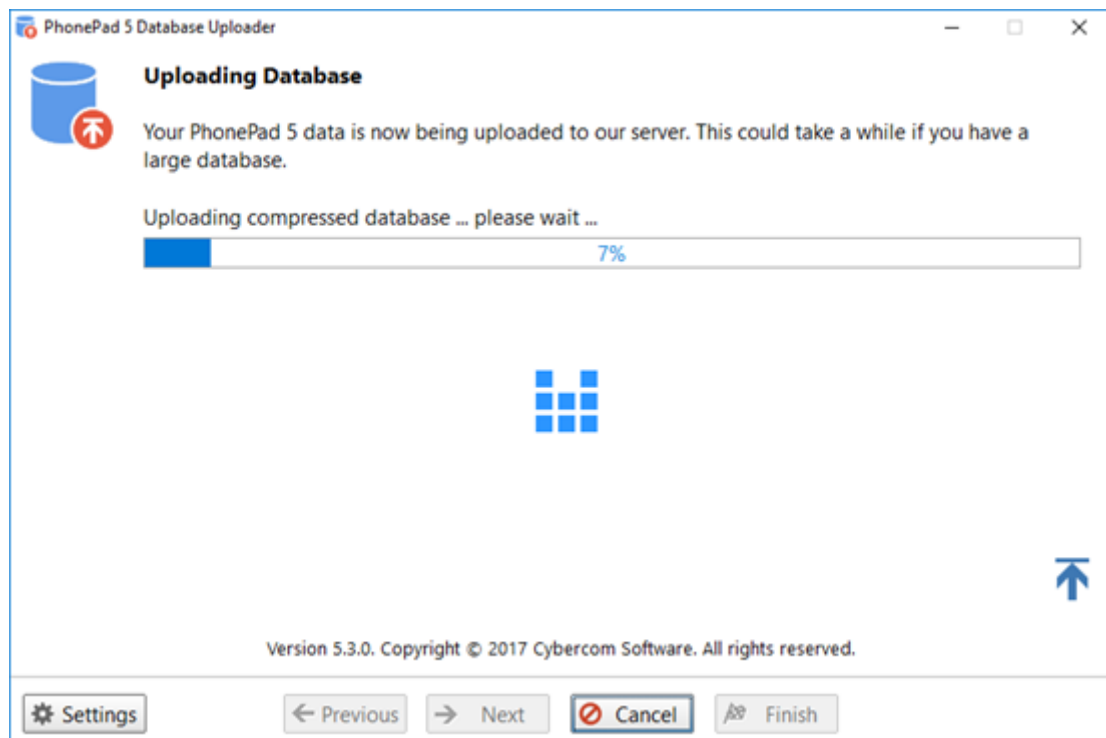


The screenshot shows a window titled "PhonePad 5 Database Uploader". Inside, there is a section titled "Your Details" with a blue cylinder icon and a red arrow pointing up. The text says: "Please enter your name and email address below." and "Your **name** will be used to identify the data files. When your database has been repaired, a notification email will be sent to the **email** address you enter." Below this, there are two input fields: "Name:" with the text "John Smith" and "Email:" with the text "j.smith@smithenterprises.com". At the bottom of the main area, it says "Click **Next** to continue." and there is a small icon of two people. The footer of the window says "Version 5.3.0. Copyright © 2017 Cybercom Software. All rights reserved." At the very bottom, there is a row of buttons: "Settings" (with a gear icon), "Previous" (with a left arrow), "Next" (with a right arrow), "Cancel" (with a red circle and slash), and "Finish" (with a checkmark icon).

7. Click **Next** to continue.
8. f
9. To save time and to ensure none of your files go missing, a copy of your database will be compressed.

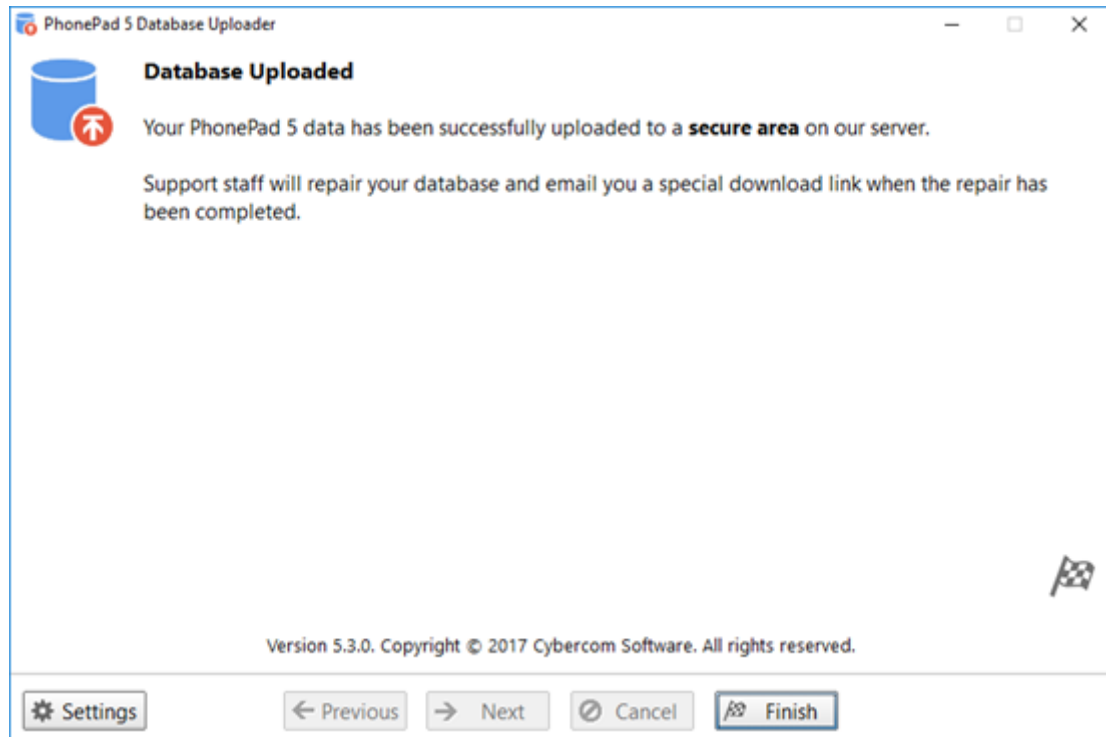


10. Once the compression has finished your database will be uploaded to our repair server.



11. This could take a while if you have a big database.

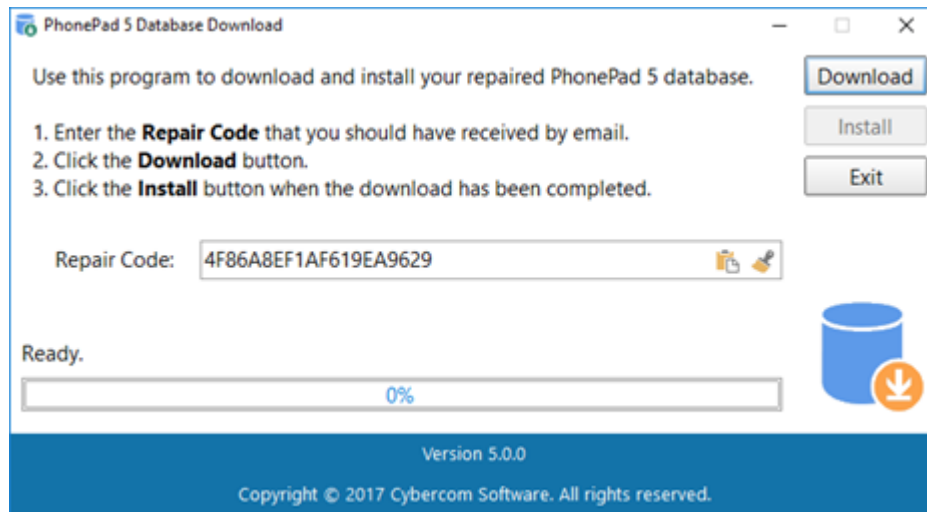
12. Once the upload has been completed click the **Finish** button.



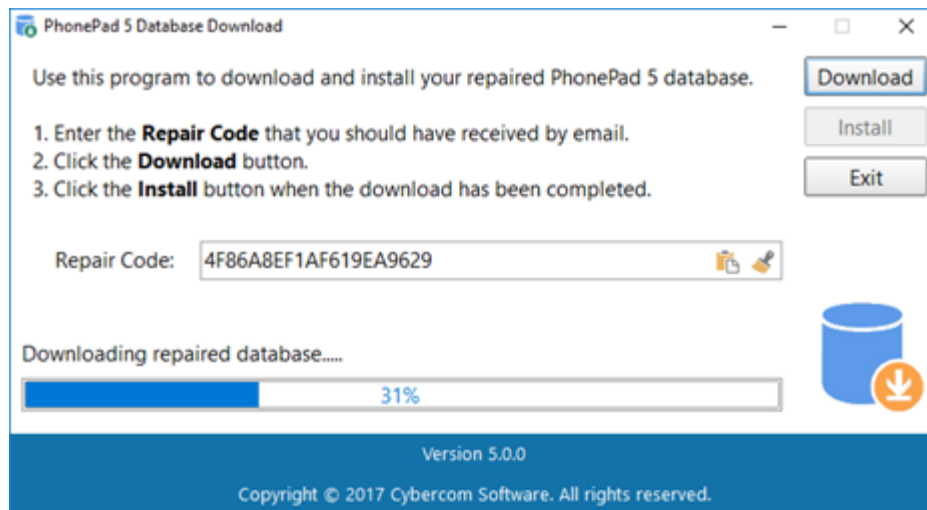
Downloading Your Repaired Database

When your PhonePad 5 database has been repaired and is ready for download, you will receive a notification email from us with instructions on how to download it. This is a fairly straightforward process.

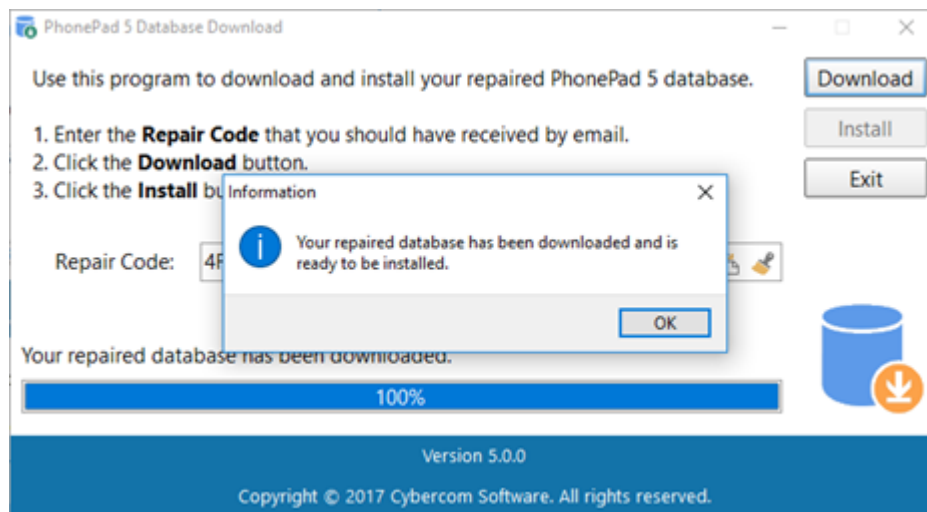
1. Copy the **Repair Code** from the email you received.
2. Run **DatabaseDownload** by right-clicking on the icon and selecting **Run as Administrator** from the popup menu..
3. Paste the Repair Code from the email into the **Repair Code** field.



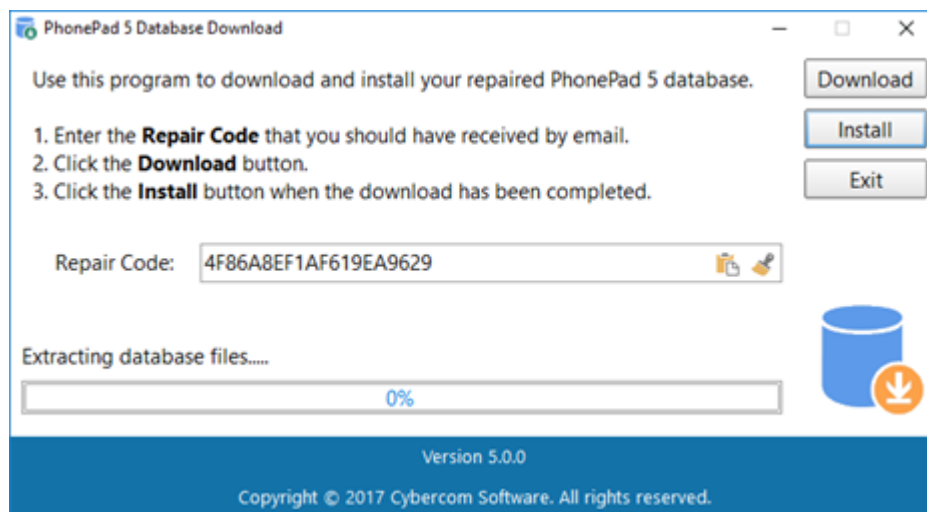
4. Click the **Download** button and select **Yes** when prompted.
5. d
6. The Repair Code will be validated and then the download should commence.



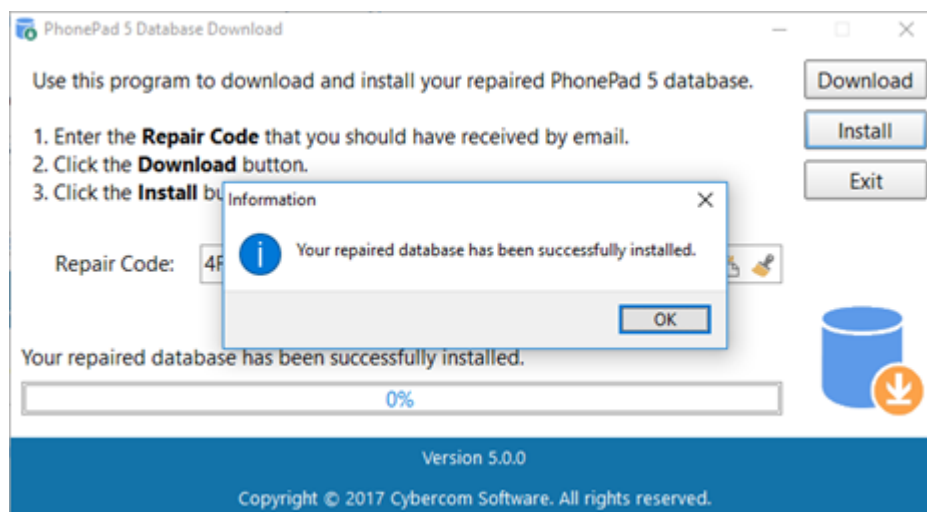
7. A message will be displayed when the download has been completed.



8. **Click OK.**
9. Click the **Install** button and click **Yes** when prompted.
10. Your database files should now be installed.



11. If all goes well you should see the following message.



12. Click **OK**, and then click the **Exit** button.

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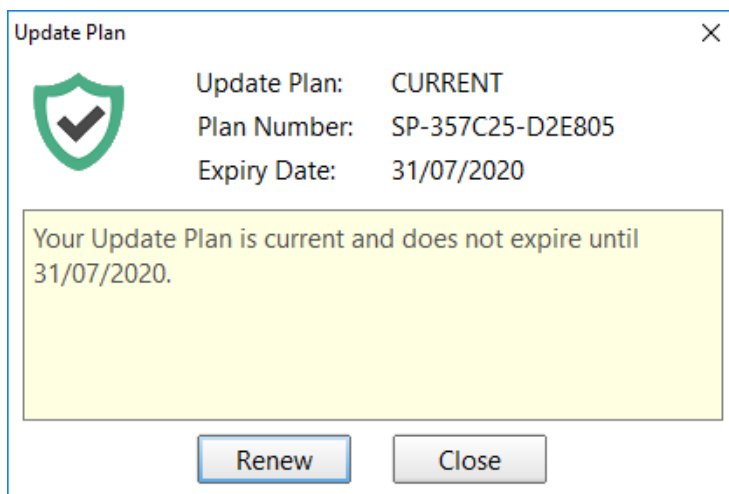
Update Plan

Update Plan

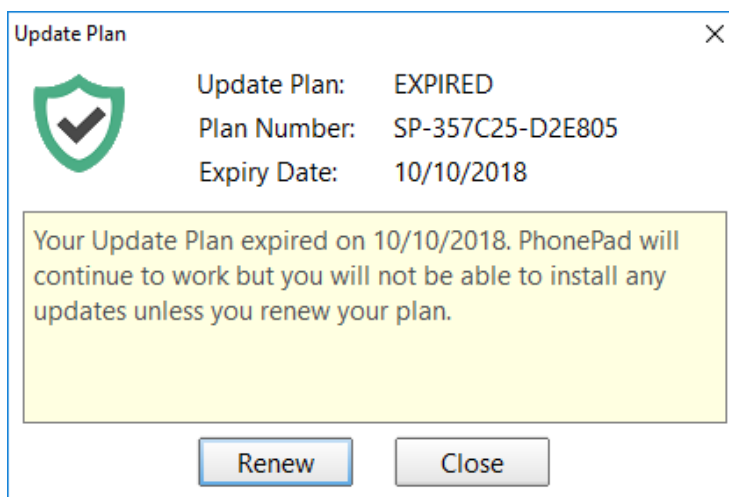
Developing software is a time consuming and expensive business. So that we can continue to develop PhonePad and provide more frequent releases, we have annual Update plans. An Update Plan provides you with all major and minor updates that are release during the period of the Update Plan. A 12 month update plan is provided with your purchase of PhonePad 5. After 12 months you have the option of renewing your update plan. PhonePad will continue to work regardless of whether or not you renew your update plan.

To check your Update Plan, select **Update Plan** from the **Help** menu.

In the first example it shows a current Update Plan that doesn't expire until the date shown.

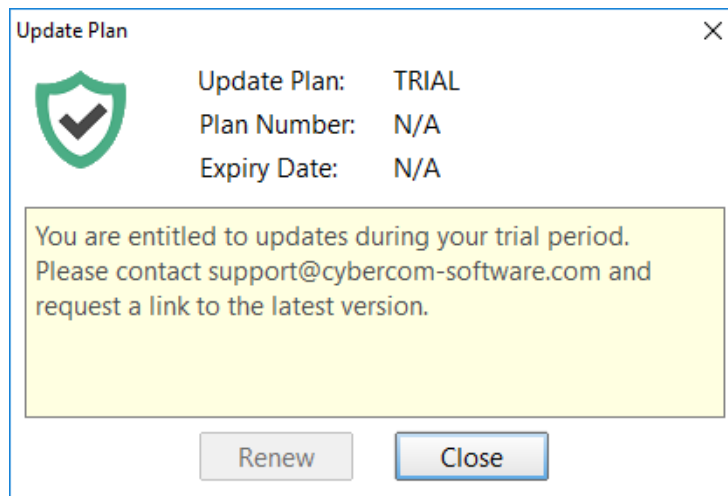


In the next example the Update Plan has expired.



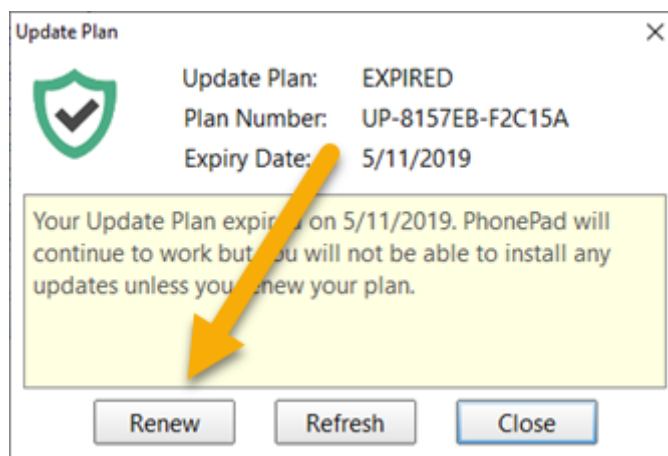
The Update Plan can be renewed at any time, either while your plan is current or when it has expired. If you renew your Update Plan while it is still current you will get a full 12 months added on to the end of your plan's expiry date, so you don't lose anything by renewing early.

If you are in the Trial period you will be on the Trial Update Plan. You are still eligible to updates during this period.

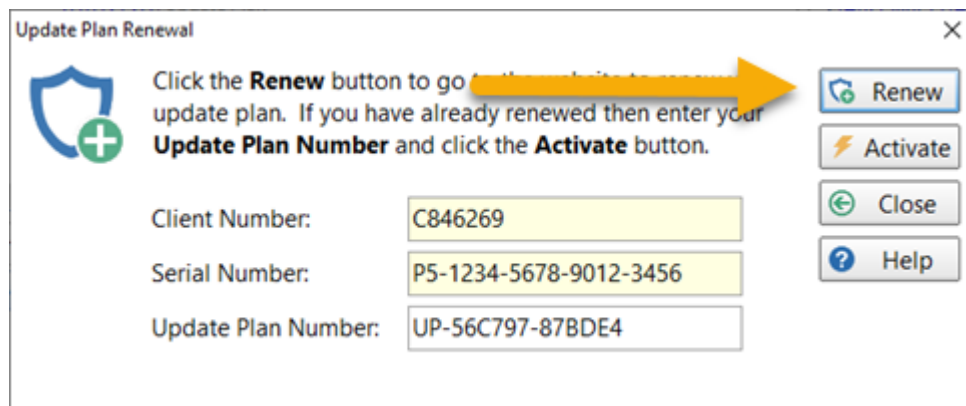


Renewing Your Update Plan

1. When you're ready to renew your Update Plan, click the **Renew** button.



2. The **Update Plan Renewal** window will be displayed.



Update Plan Renewal

Click the **Renew** button to go to the Update Plan Renewal website. If you have already renewed then enter your **Update Plan Number** and click the **Activate** button.

Client Number: C846269

Serial Number: P5-1234-5678-9012-3456

Update Plan Number: UP-56C797-87BDE4

Renew Activate Close Help

3. Click the **Renew** button on this screen. You will be taken to the Update Plan Renewal website.



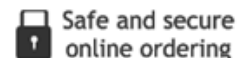
Update Plan Renewal

Renew your Update Plan today for another 12 months and continue to receive major updates and minor updates.

Client Number: C846269
Company: Fluffy Rabbit Corporation
Serial Number: P5-1234-5678-9012-3456
No of Users: 5
Price: \$29.00

Renew Now

Your IP Address is 124.180.203.185



NOTE: Prices shown are in US dollars.

4. Your details will be automatically filled in and the renewal amount for 12 months will be calculated.
5. Click the **Renew Now** button to pay for the renewal and follow the prompts.
6. Once your payment has been processed you will receive an email containing your **Update Plan Number**.

7. Enter the **Update Plan Number** and click the **Activate** button. PhonePad will be updated with the new Update Plan.

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Chapter

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Update Plans

Update Plans

Developing software is a time consuming and expensive business. So that we can continue to develop PhonePad and provide more frequent releases, we have introduced annual Update plans.

An Update Plan provides you with:

- Minor updates.
- Major updates.

A 12 month update plan is provided with your purchase of PhonePad 5. After 12 months you have the option of renewing your update plan.

PhonePad will continue to work regardless of whether or not you renew your update plan.

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