PhonePad 5
Admin Guide



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Plan the deployment

PhonePad 5 runs as a client/server system. One Windows server or host PC runs PhonePad 5 Server and holds the live database. A workstation uses PhonePad 5 Workstation to connect to that service. A host PC can serve a smaller office if it stays available while staff need PhonePad.

Decide where the server and data will live

Install the server and keep the live database on local storage on the host. Allow space for data growth, backups, snapshots, and update files. Keep copies of backups on separate storage so a failure of the host does not remove the only copy. Confirm Windows and installer compatibility for your release before deployment.

Decision	What to establish before installation
Host	Choose the Windows machine that will stay available to workstations.
Deployment type	Identify whether this is a fresh installation, a PhonePad 4 migration, a PhoneSlips import, or an update to an existing PhonePad 5 system.
Workstation access	Identify the users, groups, shared inboxes, and any remote workers.
Recovery	Assign responsibility for backup checks and record where the recovery copies are stored.

Know which role can make changes

Standard users use the features and folders assigned to them. Managers handle delegated tasks such as standard user accounts, groups, lookup lists, labels, archiving, and message reports. System Administrators can also manage system rules, communications, server operations, backups, restores, and maintenance. Managers can create Standard User accounts. System Administrators can create all three account types.

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Install and verify PhonePad

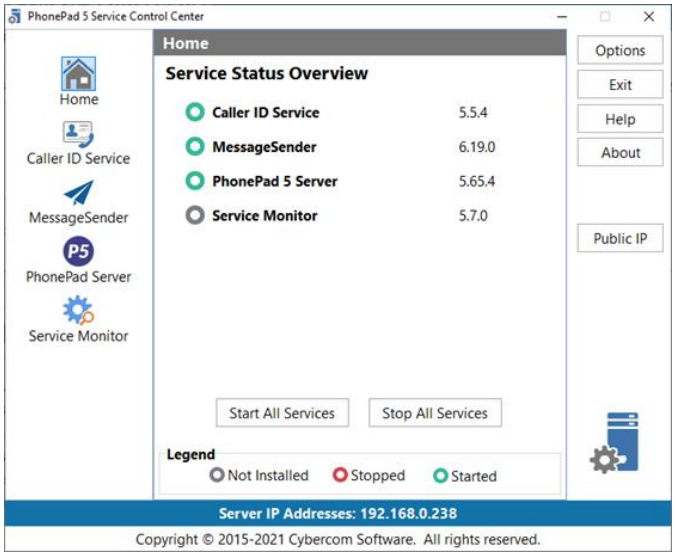
Set up PhonePad with PhonePadInstaller.exe

For a new installation, start with **PhonePadInstaller.exe**. It handles much of the setup and saves you from downloading the server and workstation installers separately. Run it and follow the on-screen prompts.

After setup, check the server status in Control Center and test a workstation sign-in and message delivery using the checks below. If you use the separate downloads, follow the server and workstation installation steps below.

Install PhonePad 5 Server

1. On the chosen server or host PC, run **phonepad5serversetup.exe**. Continue through **Next**, accept the license agreement, choose whether to create shortcuts, and click **Install**.
2. At the end, let **Setup Service** install and start the **PhonePad 5 Server** service. If service setup reports an error, use **ServiceSetup** from the installed server folder and review the result.
3. Open **Control Center** on the host. Verify the server is running, then record the version and address shown. The installer configures the Windows Firewall rules for PhonePad. If your organization uses another firewall or centrally managed policy, have the network administrator verify the equivalent rules.
4.



Control Center shows the installed version and service status at a glance.

Install and test a workstation

1. Run **phonepad5workstationsetup.exe** on a Windows workstation. Accept the agreement, choose the shortcuts you need, and complete the installation.
2. Retain the administrator sign-in information shown by Setup for the initial login. Start **PhonePad 5** and confirm it connects to the intended host. Workstations normally discover the server automatically.
3. Sign in and verify the installed version. Create a standard test user and confirm it can sign in, send a test message, and see the appropriate inboxes.
4. Repeat on the remaining workstations. Installing the workstation on the host itself can also help distinguish a local PhonePad server problem from a workstation or network problem.

Check the connection when discovery fails

Use **Connection Troubleshooter** when offered. Verify the service locally on the host and compare a working workstation with the failing one. If broadcasts are blocked or multiple servers are present, use **WorkstationConfig** to select the intended server by address or a registered **Server Access Key** where appropriate. The Server Access Key used to locate a server is separate from the Remote Access Code used by PhonePad Remote.

Migrate or move data

Migrate PhonePad 4 into an empty PhonePad 5 database

1. Back up the source and verify that the PhonePad 5 destination is empty. Run the migration from the PhonePad 5 server or host PC with access to the PhonePad 4 data folder. Rename source usernames containing spaces, double quotes, or periods before the migration.
2. Run **DatabaseMigrator.exe** from the PhonePad 5 Server installation. Select the old data folder and let the wizard locate the new database. Continue after both connection checks succeed.
3. Select the data you need and click **Start Data Migration**. Let the wizard finish, then review its outcome.
4. Verify users, access levels, messages, follow-up notes, folders, archives, and Address Book contacts. PhonePad 4 administrator accounts migrate as system administrators. Deleted messages and queued MessageSender deliveries are excluded from the migration.

Import from PhoneSlips

Open the **PhoneSlips Data Migration Tool**, select the source data files, and review the preview. Select which records to import. Depending on the tool version, the import can include contacts, messages, appointments, and users. Review potential duplicates before importing and spot-check the imported records afterward. Duplicate detection helps identify records for review.

Move to a different host or drive

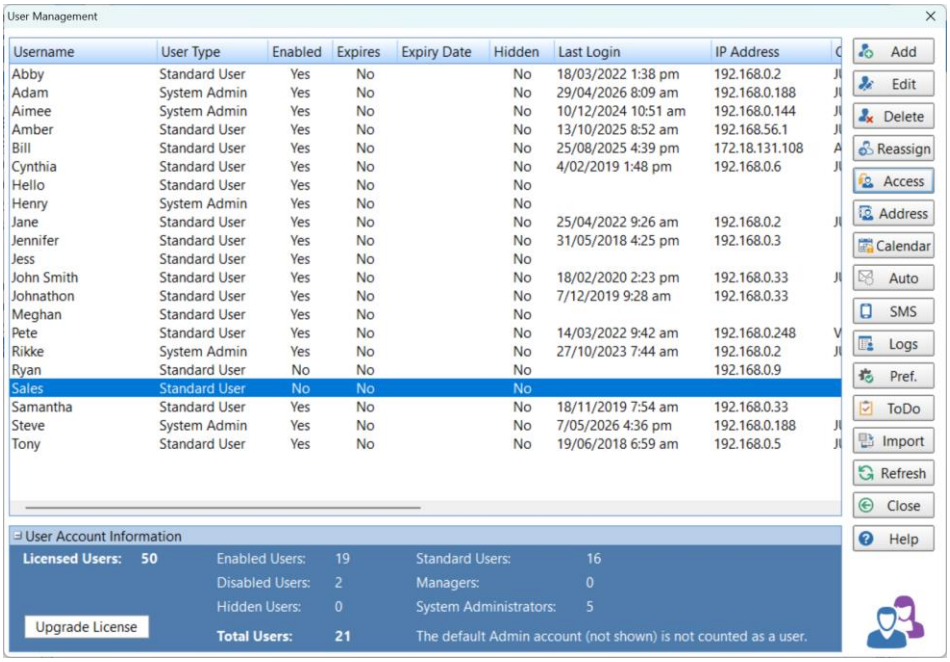
For a new server or host PC, use **Move Database** on both the old and new machines and follow its included instructions. Plan the cutover so users stop writing to the old system. Verify users, messages, backup scheduling, and workstation connections on the destination before retiring the source.

To relocate the live database to another local drive on the same host, open **RelocateDatabase** from the server installation folder. Select the destination and choose **Move**. If the tool detects a database at the destination, review the choices carefully. Overwriting replaces the destination database. The location-only option points the system to the existing destination data. Cancel if you have not verified which copy you need. Keep the live database off network shares, USB drives, and NAS storage.

Manage users and permissions

Add a user

1. Open **Manager > Manage Users** and click **Add**.
2. Enter the **Username**, **Password**, and confirmation. Choose **Standard User**, **Manager**, or **Administrator** as permitted by your own role.
3. Review **Login Enabled**, **Login Expires**, and **Hidden Account**. A hidden account can still sign in when login is enabled, but it does not appear in the user lists for message addressing. A disabled login is useful for a shared account whose inbox others access.
4. Add the display name and any contact details required for notifications or delivery. Click **OK** and verify the account.



User Management is the starting point for administering accounts and access.

Grant access to another user's work

Access	Where to configure it
Another user's inbox	Select the user who needs access and click **Access**. Select the inbox owner and check **Inbox**, then save. Reopen PhonePad if the change is not visible.
Address Book	Select the user and click **Address**. Review separately the permissions to add, edit, delete, delete all, view, print, import, and export entries.

Access	Where to configure it
Appointment Calendar	Enable **Show User in Appointment Calendar** for someone who needs their own calendar. Use the user's calendar permissions to grant access to other calendars.
To Do List	Review **To Do List Access** for work task sharing. Personal tasks are outside shared access.
SMS and Pushover	Grant access to the relevant channels and make sure the system communications service is configured.

Edit, offboard, or import users

Use **Edit** in **Manage Users** to change account details. For departing staff, disable login and review group membership, shared access, and forwarding. Use **Reassign Messages** to transfer messages that another user needs to retain before deleting the old account. Review the delete confirmation and its effect before proceeding.

In **Manage Users**, click **Import** to add accounts from a CSV file. Select the file, check its separator and enclosure settings, and map the source columns to the PhonePad fields. Click **Load** to preview the records, then click **Import**. Existing user accounts are skipped. Use **User Email Accounts** to edit email addresses from one screen. **User Logs** and **View User Preferences** can help diagnose account-specific behavior.

Update user email accounts

Open User Email Accounts to maintain email addresses from one screen. Double-click the email field for the user you want to update and enter the new address. Check that you edited the intended account, especially if two users have similar names. If the address is used for forwarding, test delivery with that user.

Set up external recipients

Open **External Users** and click **Add**. Enter the required **Username**, then add the email address, cell number, or Pushover device for the channels the person will use. A record without a delivery destination cannot receive messages. Verify delivery with MessageSender before asking staff to address messages to the new recipient.

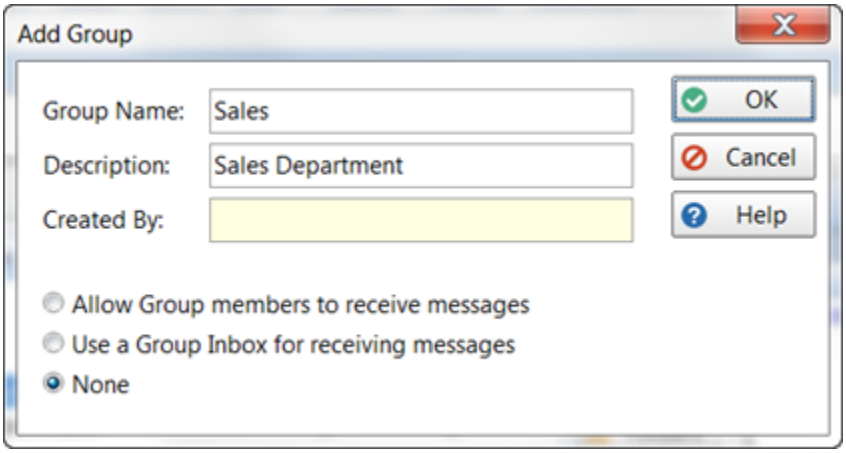
Configure groups and shared inboxes

Choose how a group receives messages

Open **Manager > Manage Groups** and click **Add**. Give the group a name and choose how members will receive messages.

Group option	What happens
Allow Group members to receive messages	PhonePad sends messages addressed to the group to its members.
Use a Group Inbox for receiving messages	PhonePad puts group messages in a shared inbox and grants the group's members access.
None	The group can be used to organize access without accepting messages addressed to it.

Add at least one member before expecting a group with a shared inbox to appear in message addressing. Use **Manage Groups** to edit membership as duties change. Group folders are for shared filing and can coexist with the group inbox.



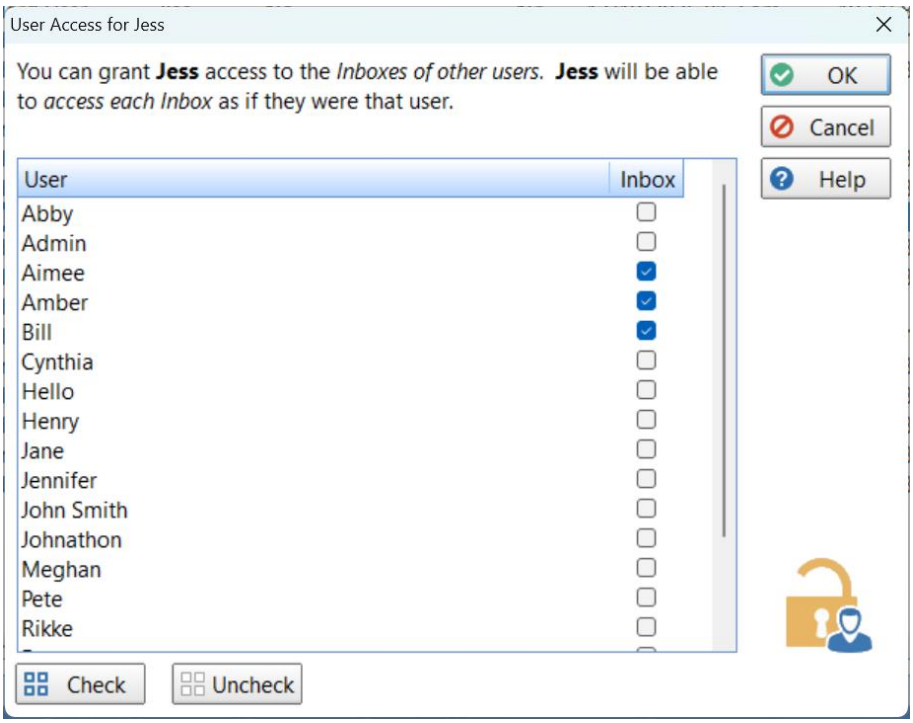
The group setup controls where messages addressed to the group are delivered.

Set up a shared workflow

Use a group inbox for a queue that a team works together. For an existing mailbox, grant staff access through **Manage Users > Access**. Test with a standard member account and check that nonmembers have the intended level of access. An answering service can use separate login-disabled accounts for clients, give operators access to the relevant inboxes, and set up MessageSender forwarding where needed.

Onboard a receptionist

Create a **Standard User** account in **Manage Users** and enable login. For a team inbox, add the receptionist to the group that owns it. For another user's inbox, select the receptionist and use **Access** to grant the required inbox. Sign in at the receptionist's workstation, send a test message to the shared inbox, and verify that the account can see it and carry out the expected tasks. Confirm that unrelated inboxes remain unavailable.



Set rules and standardize data entry

Set options that apply across the office

Open **System Admin > System Rules**. Review application, administrator, security, Address Book, message, add-on, date/time, and user interface settings. Set a baseline for staff, then sign in as a standard user to see the effect. Change related settings together and record the reason for the change.

For message entry, check who may edit sent and received messages, whether new messages should be flagged for follow-up, and which contact fields and tabs staff need. Use interface rules to control the default toolbar options. For site terminology, use the **Label Editor** where a field can be renamed.

Rule area	Examples to review
Address Book	Choose whether new callers are added, whether users see a prompt, and whether PhonePad checks for duplicates. Choose whether existing caller details are updated. Review the enabled address and document tabs, the Identification label, and Notes names and colors.
Administrator behavior	Choose whether viewing a message in **MasterView** marks it read. This affects the status other users see.
Dates and times	PhonePad uses Windows formats by default. Override the formats for lists and the status bar separately and check the examples shown in System Rules.
Appointment Calendar	Use **Show Users in Calendar** to enable calendars for several staff at once. Set who can access those calendars in user permissions.

Customize phone message labels

Open Manager > Label Editor. Click a label in the preview to jump to its field in the Label Editing area, then enter the new wording. Keep labels short. Some labels, including Caller and Company, also appear as column headings in message lists.

To show an optional field such as Custom Field 1, select the checkbox beside its name. Choose Edit Field for free text or Drop-Down List for predefined values. Use Maintain Lookup Lists to supply those values. Changes apply across the office. Open a phone message form to verify the result. Defaults restores the original label values.

The Title setting supplies the default heading for new phone messages. While composing a message, a user can double-click the heading inside the form and type a title for that message alone. The Label Editor setting continues to supply the default for other messages.

Maintain lookup lists

Open Manager > Maintain Lookup Lists. Configure contact and document types, categories, custom field values, message details and actions, and references as applicable. Use concise values that reflect decisions staff actually make. Check the fields in the message or contact form as a standard user after saving.

Example. To add a standard callback action, select Message Action, click Add, and enter Return call by end of day. Open a new phone message and check that the option appears

in the Action list. To change an existing choice, select it and click Edit. Use Default if you want PhonePad to preselect that action.

Review message activity and archives

Use the **Overview**, **Master View**, **Dashboard**, and **Reports** tools as appropriate for checking how messages are being handled. For duplicate contacts, open **Address Book Duplicates** and click **Find**. Follow the link next to a name and compare the entries before removing any duplicate.

To archive, choose **Manager > Archive Messages**, set the cutoff date, choose all or selected users, and click **Archive**. To restore messages from the archive, open **Message Archives**, find and select the messages, and click **Unarchive**.

Review inboxes in Master View

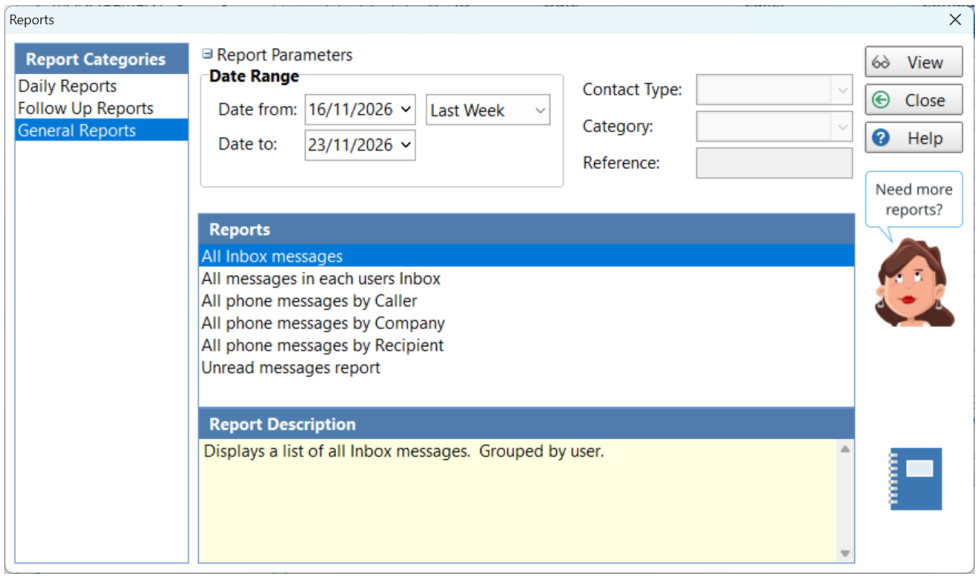
Open Manager > Master View for a live, combined view of all user inboxes. Check whose inbox holds a message and its current status. Search or filter the list as you would in your own Inbox. Double-click a message to view it.

Before opening unread messages, check Mark messages as read when viewed under System Admin > System Rules > Administrators. When enabled, viewing a message in Master View as an administrator marks it as read.

Run a report

Open Manager > Reports. Select a Report Category and a Report, then read the Report Description to check what the report includes. If Report Parameters appear, set the enabled options. Click View to open the report.

For a weekly review, choose a report that answers the question you need to investigate. If that report accepts a date range, enter the week you want to review. Check the report description and selected parameters before interpreting the results.



Configure communications and delivery

Set up MessageSender

1. Install **MessageSender 6** on the server or host PC and use the service controls to confirm its state. Complete licensing if required.
2. Open **System Admin > Communication Settings**. Configure the channels used by your office, such as email, SMS, or Pushover. Use the current service provider's settings for its account and authentication details.
3. Open **System Admin > MessageSender Settings**. Enable **Active**, then enable **Process Emails**, **Process SMS**, or **Process Pushover** as needed. Review the processing interval and log retention.
4. Send a test message through each enabled channel. Check the destination, the service logs, and the queue before enabling forwarding for the rest of the office.

Configure and test each delivery channel

Channel	Settings to check
Email	Choose your SMTP server or **CloudMail** where available. Enter the account settings and verify a test delivery. These settings can be used by PhonePad and MessageSender.

Channel	Settings to check
SMS	Select the SMS gateway you use and enter the account fields it requires. Enable **Active** and use **Test** with a number that includes its country code.
Pushover	For API delivery, enter the user key and application key, enable **Active**, and use **Test**. The documented alternative for automatic forwarding is the recipient's Pushover email address.

Configure templates, forwarding, and notifications

Use **MessageSender Templates** to manage reusable formats for your configured channels. You can delete custom templates. If standard templates are missing, use **Rebuild MessageSender Standard Templates**. Review the message subject and test the template with realistic content. For replies to forwarded email, preserve the **MID** in the subject so reports and replies can be associated with the original message.

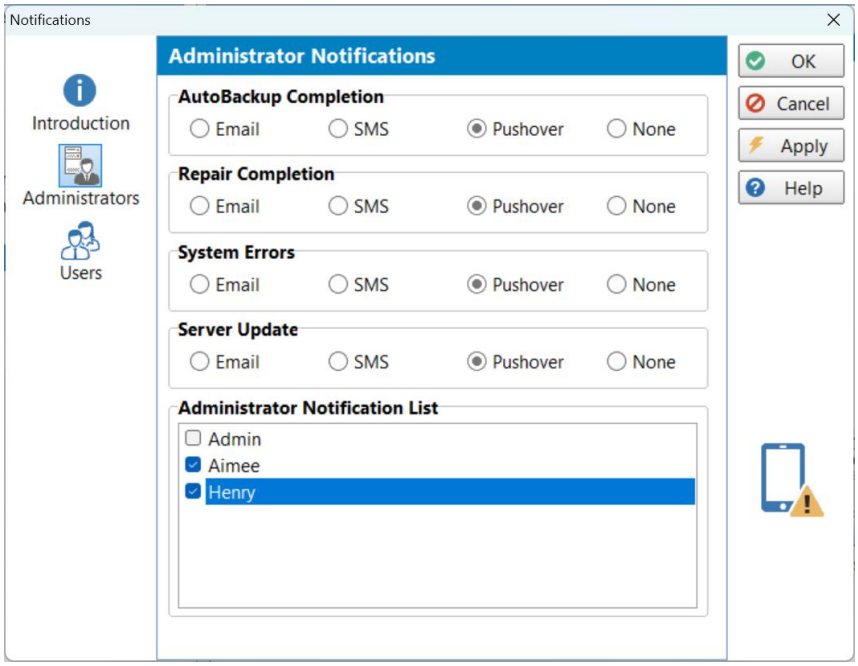
Use **Manage Users** to configure or enable forwarding for individual users. Review the user's destinations, availability, and forwarding conditions. Configure administrator and user notifications under **System Admin > Notifications** as appropriate for your deployment.

To offer **I Forgot My Password**, first configure communications and user notifications and populate the required email, cell number, or Pushover destination on the account. Review the recovery behavior against your organization's password policy before enabling it.

Configure System Admin notifications

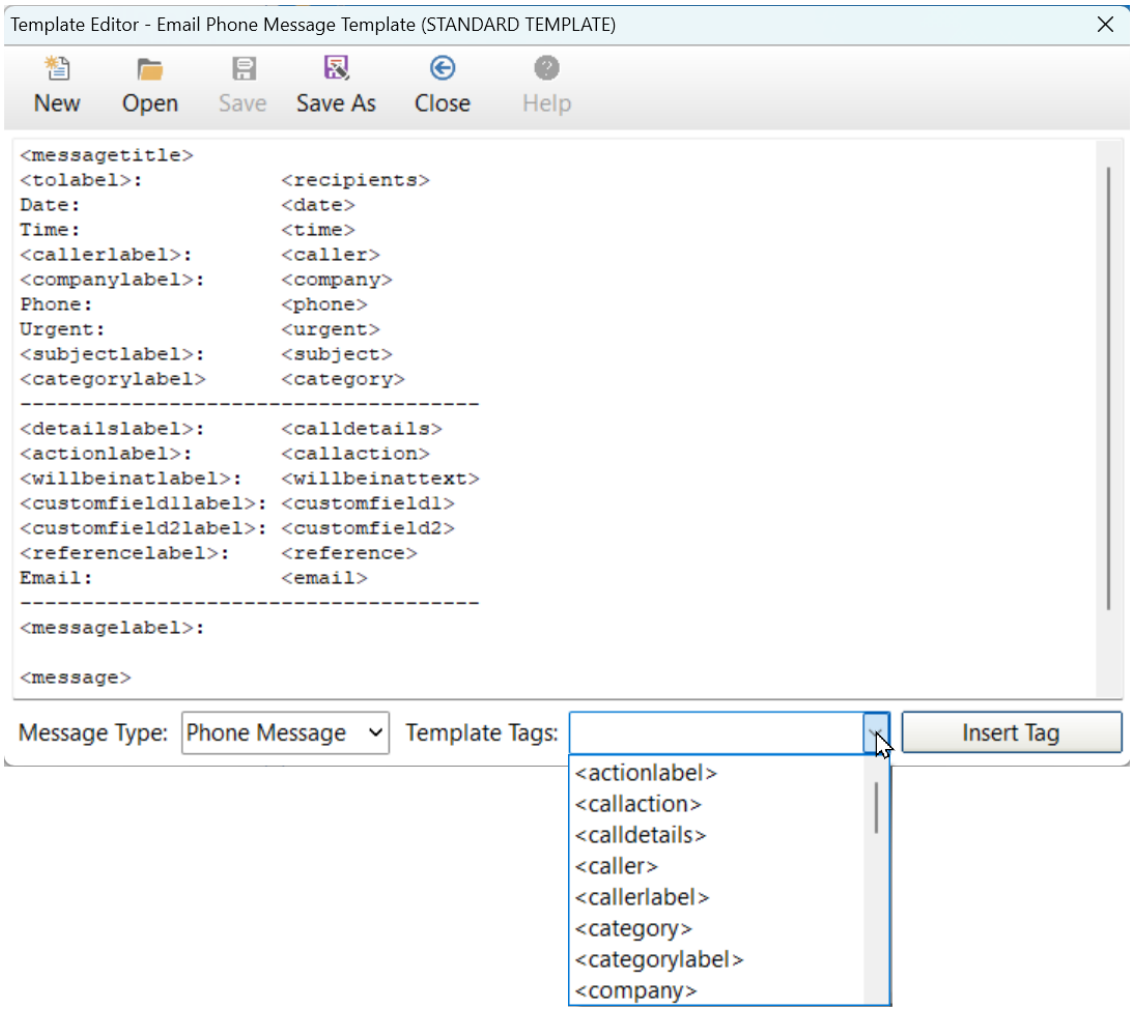
Open System Admin > Notifications and select Administrators in the side menu. Choose a delivery channel for each event you want to monitor, such as AutoBackup Completion, Repair Completion, or System Errors. The documented options are Email, SMS, Pushover, Cloud, and None. Confirm the intended administrator destinations and check Communication Settings for locally configured channels. Verify delivery after the next scheduled backup.

Select Users in the same window to review Forgotten Passwords delivery. Choose a channel allowed by your organization's password policy and check that the test user has the corresponding email address, cell number, or Pushover device name. Choose None to disable delivery and test with a designated account after making changes.



Test a MessageSender template with sample data

Open the template for the message type and delivery channel you want to change. For a phone message, the template text **Please call <caller> at <phone>.** can produce **Please call Taylor Morgan at 202-555-0142.** Use the tag list for the selected message type. Send a test to yourself and check the rendered content, subject, and handling of blank fields before using it for live delivery.



Configure email for the Email Message command

The **Email Message** dialog has a **Settings** button for administrators. By default it uses **Communication Settings**. To use a separate mail account for this command, choose **Use Mail Server**, enter the SMTP server and port, and review the **Mail User Account** and **Authentication** tabs. Use the provider's current settings, save, and send a test from **Email Message**.

Investigate a message that is still queued

Open **System Admin > MessageSender Message Queue** and refresh. Confirm that the service is running, the destination is valid, and processing is enabled for the channel. Use logs to distinguish a delivery rejection from an item waiting to be processed.

Use **Manage Queue** to remove only the messages you intend to discard. **Clear Queue** discards all pending messages, and channel removal commands discard pending items for the chosen channel. A removed item is no longer sent by that queue.

Enable and test remote access

Set up PhonePad Remote

1. Open **System Admin > Remote Access**. Check **Remote Access Enabled**, click the shield button to generate a **Remote Access Code**, and save.
2. Use a stable local address for the host. For the direct connection described in the Web Help, have the network administrator configure the router to forward the PhonePad TCP port to that host. The documented default is **TCP 12600**. Confirm the actual port and authorized access policy before enabling the rule.
3. Install **PhonePad 5 Workstation** on the remote Windows PC. It includes PhonePad Remote. Give the access code to authorized users through your usual secure channel.
4. From a connection outside the office network, open **PhonePad Remote**, enter the code, click **Connect**, and verify that the PhonePad sign-in window appears. Test with a normal user account.

Generating a new code invalidates the old one. Plan the change and distribute the replacement to authorized users. If local access works but remote access fails, check remote connectivity and the router or firewall with the network administrator before changing workstation settings.

Caller ID, WebSync, and integrations

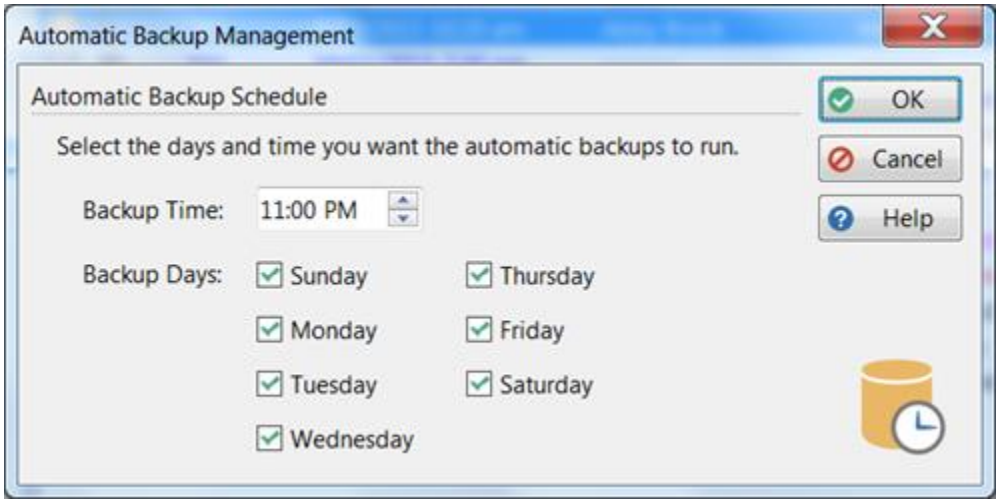
Use the **Caller ID Service** controls in **Control Center** for installations using supported CallerID.com hardware. Confirm that the service is running, configure the PhonePad workstations that need incoming call information, and verify that a test call displays the expected number and contact. Use the separate integration instructions for sending caller information from another system.

For deployments using WebSync, check the service and the integration documentation for your installed release. The Web Help export lists the service but supplies no configuration procedure.

Protect the database with backups

Schedule and verify automatic backups

1. Open **System Admin > AutoBackup**. Review the schedule created by Setup and choose the time and days suitable for your site.
2. Set **Backup Limit** if you want PhonePad to remove older copies. The documented range is 5 to 90 retained backups.
3. Select a separate destination and enable **Automatically copy backup files to external storage** if you want PhonePad to copy completed backups there. Use **Copy Now** for a manual copy.
4. Save with **OK**. Check **Backup Logs** after the next scheduled run and verify that the backup also reached the separate destination.



Review the automatic backup schedule and retention settings.

Run a manual backup

Choose **System Admin > Backup**, enter a description, and click **Backup**. Wait for completion and check the resulting backup before starting an update, migration, or repair that requires a recovery point. Keep the backup date and purpose in your maintenance notes.

Check backup logs and files

Open System Admin > Backup Logs. Find the entry for the last scheduled or manual run and check its date, time, and outcome. If a scheduled run is missing or reports an error, check the AutoBackup schedule and the backup destination.

Open the Backup Files tab at the bottom of the window to see the available backup files. Match the file to the run you checked. If you copy backups to separate storage, check that destination for the matching copy.

Choose the right recovery copy

Recovery copy	When to use it
PhonePad backup	Recover data and configuration from a particular backup date. Confirm compatibility between the backup and currently installed server files.
Server update snapshot	Roll back the database and application files together after a problematic update. Check the snapshot timestamp and the changes that will be rolled back.
Host backup	Recover the machine or other files outside the coverage of a PhonePad database backup. Verify the scope in the host backup software.

Restore or repair the system

Coordinate downtime

Use **Broadcast** to ask staff to save their work and sign out before maintenance. **Server Sessions** shows who remains connected. Use **Logout Users** only after giving staff time to close their work. It forcibly disconnects other users.

Send a broadcast to logged-in users

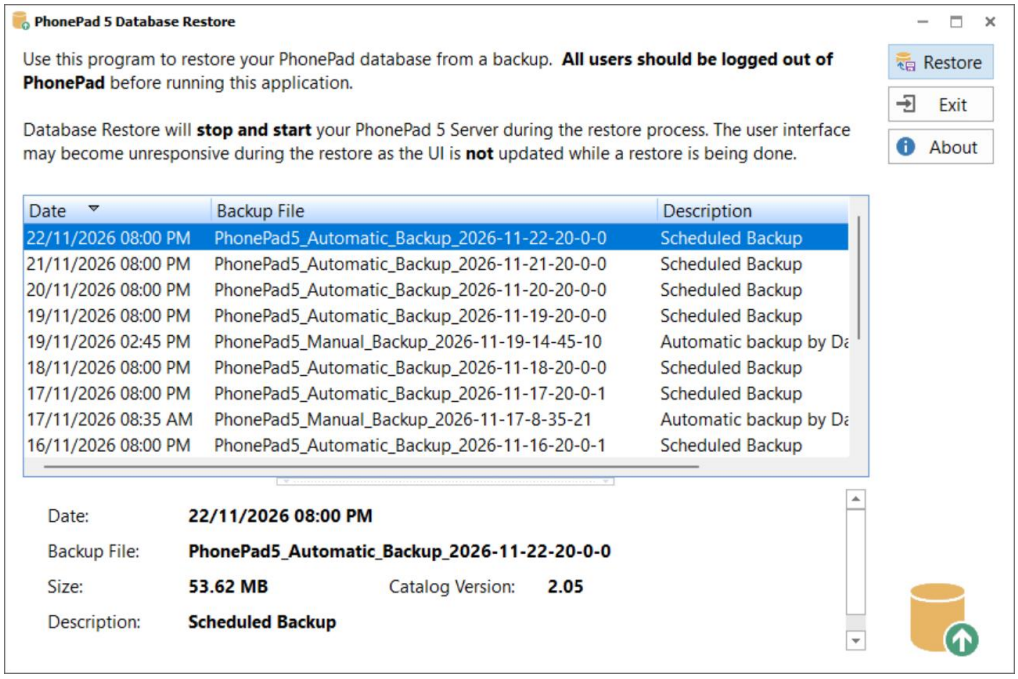
On the System Admin toolbar, click Broadcast. In Send Broadcast, enter up to 500 characters and click Send. PhonePad displays the message to users who are logged in.

Example. PhonePad maintenance starts at 5:15 PM today. Please save your work and sign out by 5:10 PM. We'll let you know when you can sign back in.

Restore a database backup

1. Confirm the backup timestamp and version. Identify data entered after the recovery point and preserve a copy of the current database or a current backup if available.
2. Make sure all users are signed out. On the host, run **DatabaseRestore** from the server installation folder.
3. Select the backup from the list, verify the details in the lower pane, and click **Restore**. Wait for completion.

4. Check that the server can open the restored database. If it came from an older version, follow the older-version restore procedure for applying the matching server update to bring the database schema up to the installed release. Verify contacts, messages, and a workstation sign-in before reopening access.
5.



Check the backup details before restoring the selected database.

Roll back an update with a snapshot

On the host, run **RestoreSnapshot** from the server installation folder. Select the pre-update snapshot by date and time and click **Restore**. Confirm after checking the recovery point. The tool stops and restarts the server service. Verify the restored version and workstation compatibility afterward.

Restore configuration or repair a database

If only the database configuration file is damaged, sign users out and run **Config Restore** on the host. Select a backup and confirm the restore. The server service stops temporarily during this operation.

For a database repair, use **System Admin > Repair** if you can sign in, or run **DatabaseRepair** on the host if you cannot. Repair requires exclusive database access. Preserve a recovery copy first, review the repair log, and verify the affected records. If Support asks for the database, use the approved upload and return procedure and coordinate any replacement with Support.

Apply updates and administer licenses

Install a PhonePad 5 server update

1. Check **System Admin > Server Updates** or sign in to **My PhonePad** and locate the server update for your installation. Confirm the target release and read the release notes.
2. Schedule the update and verify the most recent backup. Use the server update package on the server or host PC. The full server setup is intended for a fresh installation and can replace existing data.
3. Let the update finish, then check the server version and status. Let a workstation start and receive its update before releasing the remaining workstations. Verify that a user can sign in and send or receive a message.
4. If an update fails, check logs and the available snapshot before attempting recovery. For a mismatch, confirm which server the workstation is connecting to and whether update propagation completed.

Activate a license and manage the Update Plan

Open **Help > License**, enter the **Client Number**, **Email Address**, and **Serial Number** supplied with the purchase, and click **Activate**. Licensing is system-wide. Use **License Information** to verify the result. For offline activation, use **Use Code** and follow the displayed request and activation steps with a computer that can reach the licensing service.

Open the **Update Plan** window to review the plan and start renewal. Follow the site prompts, then enter and activate the new plan number if required. If the renewed plan is not reflected in PhonePad, use **Refresh** to retrieve the current details.

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Manage services and diagnose problems

Check service status on the host

Open **Control Center** to see service status and the installed server version. Select the service you need, such as **PhonePad 5 Server**, **Caller ID Service**, **MessageSender**, or **Service Monitor**. Check status and logs before using start, stop, or restart controls. Restarting the server interrupts connected workstations.

Use **Service Monitor** for the monitoring options exposed by your version. Use **Process Monitor** and **Server Sessions** to see activity, and **Log Viewer** or **Server Logs** to investigate errors. Use **System Maintenance** only for a documented procedure that applies to the problem or when Support directs you to an option.

Check addresses and default ports

Control Center displays the active host addresses. If the host has several network interface cards and only one should be used, select **Add Override** in the server address settings. Leave the override blank when normal detection works..

Server Access Keys

To use a Server Access Key for workstation discovery, generate and register it in **Control Center**, confirm its registration status, then enter it in **WorkstationConfig** on the workstation. Keep activity logging enabled if you need connection evidence. Use remote tracing only for a short diagnostic session when requested by Support.

Diagnose by symptom

Symptom	What to check
No workstation connects	Check locally on the host that the server service is up and the correct database is available. Review server logs and host connectivity.
One workstation fails to connect	Compare the failing workstation with one that works. Run Connection Troubleshooter and check discovery, endpoint policy, the configured server, and version.
Several servers are detected	Confirm the intended host before changing settings. Use an explicit server selection through WorkstationConfig where appropriate.

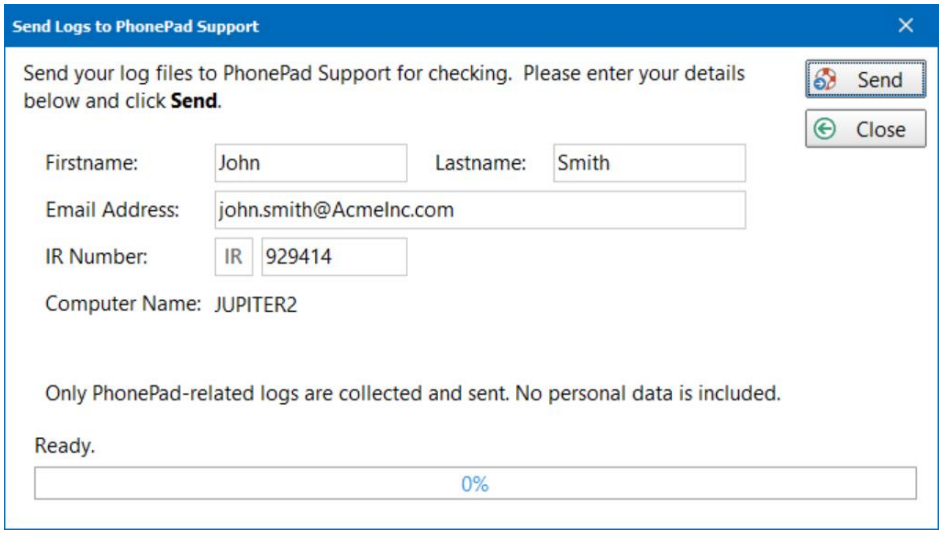
Symptom	What to check
Startup freezes or login validation fails	Record when it began and whether it follows an update. Check logs, host reachability, and the organization's endpoint policy.
I/O Error 103	Have a Windows administrator check write access to the installed workstation and PhonePad data/log folders. Use PermissionsCheck if appropriate.
Slow performance	Compare affected and unaffected workstations, network segments, and time periods. Check host load and traffic and measure with **System Admin > Speed Test**.
Message delivery stalls	Check MessageSender service status, channel settings, queue, and the corresponding delivery logs.

Collect useful evidence for Support

Email support@cybercom-software.com about the issue. Include the exact error or symptom, when it occurred, the steps that triggered it, and whether it affected one user or several.

The automated confirmation reply includes an Incident Report (IR) number. Have that number ready before sending the logs.

Open **Log Viewer** and click **Support** to collect diagnostic information, including logs, version details, and system information. Enter the IR number when prompted, then follow the prompts to send the logs.



Use **Monitor SQL Performance** when investigating database response times with Support. Enable it for the observation, refresh or export the results, and turn it off when the observation is complete.

Reference for the server tools

Tool	Typical use
Control Center	Check version, addresses, service status, and server settings. Use an IP override only when the host has multiple addresses and the deployment needs one specific address.
WorkstationConfig	Review discovery, explicit server selection, connection settings, and workstation diagnostics.
DatabaseRestore	Restore a backup on the host.
RestoreSnapshot	Restore the server application and database to a pre-update snapshot.
Config Restore	Recover the database configuration file from a backup.
DatabaseRepair	Repair the database from the host when the in-app repair is unavailable.
Move Database	Move the database to another server or host PC.
RelocateDatabase	Move the database to a different local drive on the same machine.
Log Viewer	Review logs for service, connection, and operation errors.
Process Monitor and Server Sessions	Inspect server activity and current connections.

Use **Help** for System Information, license and account information, and support. For staff procedures such as filing messages or using the Address Book, see the **PhonePad 5 User Guide**. See the **Appointment Calendar User Guide** for calendar-specific administration and booking workflows.

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