

Client Master Data

Here, you can see the master data for the current client, and change some parameters.

Choose **User Data - Client Master Data** in the main menu, to view the data. Use the tabs to switch between different parameter sets.

Master Data

This data is read only.

Options

This page includes various options you can set for the client account. Some parameters can be changed:

Determine Workstation Telephone Number	When selected, the IP address and computer name passed by the mini client are compared to the workstations table when agents log in. If a match is found, the telephone number for the agent is set according to the workstation entry.
Destination number for status based call forwarding	If the status-based routing (see Agent Status) is used, the number to which the call is forwarded can be set with Editing Users . If no number is registered here, the number in the client settings is used. The status-based routing requires the operation of a PXB connector.
Check redirection status before connecting ACD call	If this box is checked, the status of the number the call is being forwarded to is checked before the call is connected. See also Destination Number Status
Work Break Slot Indicator %	<p>The settings of the Client Work Break Indicator. The number of available pause slots N is calculated in proportion to the number of logged in agents. If, for example, 10 agents are logged in and 50% is set as a value, the Client Work Break Indicator shows the following:</p> <ul style="list-style-type: none">• < 5 agents in pause: Green• 5 agents in pause: Yellow:• > 5 agents in pause: Red:
First Call Delay	If the agent changes to a status with telephony, the first call will only be delivered after the expiration of the delay time. This setting is useful for high frequency contact centers in which the agent should have a few seconds time at his disposal before the phone rings. By using the status-based routing this feature might be useful, since some PXB systems don't immediately switch off the call transfer, but only after a short delay.
Show Status Time at Agent	If this box is checked, the agent status duration will be displayed in the agent status area, in the following format: (hh:mm:ss)
Web service URL for the call answering function in Agent Home	The URL of the web service for the call-answering function in Agent Home via web portal is entered.
innovaphone PBX Integration URL	The URL with which the MyPBX innovaphone application is loaded. For example: http://innovaphone.localdomain/PBX0/MY/client.htm

Synchronise Users from PBX	If this box is checked, the users table will be synchronised with the users in the PBX.
Synchronise PBX Users from PBX	If this box is checked, the PBX Users table will be synchronised with the users in the PBX.
Phone Status Synchronisation Mode	<p>Two different behaviours of the phone status synchronisation can be used:</p> <p>Based on fixed user assignments</p> <ul style="list-style-type: none"> • Will permanently synchronise the status of ?? <p>Based on active phone number</p> <ul style="list-style-type: none"> • Will synchronise the status based on the agents active telephone number
Outdial Account Code	This setting is read-only and can be changed by the reseller administrator. See also <Insert "Working as Reseller Administrator" Here>
Outdial Caller Number	This parameter determines how the calling party number is signalled when the client data settings are used for outdials. This number can be overwritten in the network IVR for example (assuming the rights assigned to your account allow this).
Provider	This setting is read-only and can be changed by the reseller administrator. See also <Insert "Working as Reseller Administrator" Here>
SMS Caller Number	<p>This parameter determines the calling party number signalled when SMS are sent.</p> <p>This number can be overwritten in the corresponding module in the network IVR (assuming the rights assigned to your account allow this).</p>
Username / Account	This setting is read-only and can be changed by the reseller administrator. See also <Insert "Working as Reseller Administrator" Here>
Password	This setting is read-only and can be changed by the reseller administrator. See also <Insert "Working as Reseller Administrator" Here>
Group / API ID / Service	This setting is read-only and can be changed by the reseller administrator. See also <Insert "Working as Reseller Administrator" Here>
LDAP server	<p>If you indicate an equivalent configured LDAP server here, all users with a LDAP account can be authenticate by the server when they login to the portal or use the SOAP interface. The requirement is that a LDAP user name is also registered at the user. Exemplary input: ldap://servername:389</p> <p><i>For further information, visit this page</i></p>
Default Language	The default language which is used, for example for emails which are generated in the account, and voice prompts.

Download File Name Template	<p>This defines a download file name used when call specific recordings are downloaded from the web application.</p> <p>Note: the following special characters are removed from the file name:</p> <p><> : " / \ ? * ,</p> <p>The following variables can be used:</p> <table> <tr> <th>Variable</th><th>Meaning / Replacement</th></tr> <tr> <td>\$AcidGroupsName</td><td>Name of the ACD Group (empty, if no ACD group was involved with the recording).</td></tr> <tr> <td>\$AcidGroupsID</td><td>ID of the ACD Group (empty, if no ACD group was involved with the recording).</td></tr> <tr> <td>\$AcidGroupsNumber</td><td>Number of the ACD Group (empty, if no ACD group was involved with the recording).</td></tr> <tr> <td>\$AgentNumber</td><td>Number of the Agent (empty, if no agent was involved with the recording).</td></tr> <tr> <td>\$AgentTel</td><td>Telephone number of the Agent (empty, if no agent was involved with the recording).</td></tr> <tr> <td>\$Caller</td><td>Caller Number.</td></tr> <tr> <td>\$ID</td><td>ID of the record in the jtel system.</td></tr> <tr> <td>\$Date</td><td>Date of the recording in the format yyyyMMdd</td></tr> <tr> <td>\$Time</td><td>Time of the recording in the format hhmmss</td></tr> <tr> <td>\$ServiceNumber</td><td>Service Number - Field RootNumber.</td></tr> <tr> <td>\$ServiceNumberName</td><td>Service Number - Field ServiceNumber.</td></tr> <tr> <td>\$ServiceNumberName2</td><td>Service Number - Field Name.</td></tr> <tr> <td>\$Subject</td><td>Subject of the recording.</td></tr> <tr> <td>\$StatisticsPartAID</td><td>ID aus der StatisticsPartA.</td></tr> <tr> <td>\$UserData</td><td>The UserData field from StatisticsPartA.</td></tr> <tr> <td>\$UsersID</td><td>ID of the user (empty, if no user was involved with the recording).</td></tr> <tr> <td>\$UserName</td><td>ID of the user (empty, if no user was involved with the recording).</td></tr> <tr> <td>\$UsersUID</td><td>UID of the user (empty, if no user was involved with the recording).</td></tr> </table>	Variable	Meaning / Replacement	\$AcidGroupsName	Name of the ACD Group (empty, if no ACD group was involved with the recording).	\$AcidGroupsID	ID of the ACD Group (empty, if no ACD group was involved with the recording).	\$AcidGroupsNumber	Number of the ACD Group (empty, if no ACD group was involved with the recording).	\$AgentNumber	Number of the Agent (empty, if no agent was involved with the recording).	\$AgentTel	Telephone number of the Agent (empty, if no agent was involved with the recording).	\$Caller	Caller Number.	\$ID	ID of the record in the jtel system.	\$Date	Date of the recording in the format yyyyMMdd	\$Time	Time of the recording in the format hhmmss	\$ServiceNumber	Service Number - Field RootNumber.	\$ServiceNumberName	Service Number - Field ServiceNumber.	\$ServiceNumberName2	Service Number - Field Name.	\$Subject	Subject of the recording.	\$StatisticsPartAID	ID aus der StatisticsPartA.	\$UserData	The UserData field from StatisticsPartA.	\$UsersID	ID of the user (empty, if no user was involved with the recording).	\$UserName	ID of the user (empty, if no user was involved with the recording).	\$UsersUID	UID of the user (empty, if no user was involved with the recording).
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Agent Home	Set a refresh interval for the data refresh in the agent home screens.																																						
Supervisor	Set a refresh interval for the data refresh in the supervisor screens.																																						
Display Name	The Display Name of a Foreign System can be defined here																																						
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URL 2 Display Name	The Display Name of the second Foreign System URL can be defined here
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Import Directory Contacts	The system can automatically import CSV files containing Contact Data, using the configured directory name. The format of the import file is described under Contacts . This directory references the share drive, in the following format: //acd-store/shared/Data/clients/<ClientsID>/<DirectoryName>, for example: //acd-store/shared/Data/clients/1/ contactImportDir Note: only the sub-directory name is configured. If a CSV file is copied to this directory, in the subdirectory " In ", it is imported and then moved to the directory " Done ".

Routing

Here you can setup black and white lists for the filtering of calls.

Blacklist	A list of contacts, who are not allowed to call services of the client.
Whitelist	A list of contacts, who are allowed to call services of the client. Note, that this option excludes <i>all other</i> callers! Only contacts belonging to the white list are allowed to call services of the account.

Email

Here you setup how emails are sent from the account.

Email Sender	The sender used when emails are sent
Email Signature	This signature is attached to all emails sent by the system.
Minimum Email Size (in KB)	Select a minimum size in KB which email attachments must have. When audio files are sent, the minimum size is achieved by adding noise to the end of the file.
Maximum Email Size (in MB)	Select a maximum size in MB which email attachments can have. This maximum size only applies to ZIP files. A single file will even be sent if it exceeds this limit. ZIP files, containing only one file, will also be sent no matter what limit is set.
Email-Server	Email-Server This setting is only necessary, if another server other than the system default email server is to be used for delivery. For example smtp.mydomain.com
Email User	The user name for authorisation using SMTP AUTH
Email Password	The password for authorisation using SMTP AUTH
Change Email Password	Enter a new password.
Confirm Change Email Password	Repeat the new password.

FTP Export

Here you setup how the system interacts by FTP when exporting voice and call recordings.

FTP Server	<div>The FTP server to use.</div> <div>FROM RELEASE 3.23</div> <div>From release 3.23, you can specify the following in front of the server name:</div> <div>ftp:// will use a normal FTP server, however optionally if detected a switch to ftps will be made.</div> <div>ftps:// will use the FTPS protocol.</div> <div>sftp:// will use the SFTP protocol.</div> <div>file:// will copy the file on the file system (note, this is not useful on cloud installations).</div>
FTP User	The user name for the FTP account
FTP Password	Click here to set the FTP password.
FTP Start Directory	An optional start directory from which all FTP requests start relative to the root directory on the FTP account. This directory is selected immediately after login.
FTP Conference Recordings Directory	The directory into which conference recording files should be uploaded.
FTP Call Recording Directory	The directory into which call recording files should be uploaded.
FTP Call Recording File Name	

Here you can setup a file name, which is used when call recording files are uploaded to the FTP server.

Example: MyCenter_ACD_\$date_\$time_\$caller_\$cparty_\$agent_tel_\$agent_number_\$agent_name_\$group_number_\$group_name_\$caller.wav

FROM RELEASE 3.23 it is possible to specify a / in the filename to create additional directories using variables.

Variable	Content	From Release
\$addinfo	The additional information field set via the IVR.	
\$extrainfo		
\$agent_id	The Users.ID of the user who made the recording.	
\$agent_number	The users ACD Agent Number.	
\$agent_firstname	The first name of the ACD user.	
\$agent_name	The name of the ACD user.	
\$agent_tel	The called telephone number of the user (agent) who made the recording.	
\$cparty		
\$caller_e164	The caller telephone number in E.164 format without +	
\$caller		
\$callstart	The start date / time of the call in the format 'yyyy-MM-dd HH.mm.ss.SSS'	
\$cparty_e164	The called telephone number (service number) in E.164 format without +	
\$cparty	The called telephone number (service number) in E.164 format including a +.	
\$date	The current date in the format YYYYMMDD	
\$group_number	The ACD group number.	
\$groupnumber		
\$group_name	The ACD group name.	
\$groupname		
\$servicenumber_billingnumber	The ServiceNumbers.BillingNumber field from the servicenumber the call was made on.	3.32
\$servicenumber_name	The ServiceNumbers.Name field ("Service Number" in portal).	
\$servicenumber	The ServiceNumbers.RootNumber field ("Platform Destination" in portal).	
\$statisticsparta_id	The ID of the StatisticsPartA record for the call.	3.32
\$time	The time the recording is saved in the format HHMMSS	
\$userdata	The value of the field UserData associated with the call.	

FTP Import

Here you setup how the system interacts by FTP, when importing data to the system.

FTP Server	FTP Server
FTP User	The user name for the FTP account
FTP Password	Click here to set the FTP password.
FTP Start Directory	An optional start directory from which all FTP requests start relative to the root directory on the FTP account. This directory is selected immediately after login.

Call Recording

Here prompts which are played by the system before and after call recording is started or stopped can be configured (assuming your user account has rights to access this function, and the function is configured). Depending on the country and the system being used, the possibility of changing entries here may be restricted. The following prompts are available:

Permanent / can not be switched off	Announcement before queue before start	This prompt is played before the call enters the ACD queue.
Permanent / can be switched off (opt out)	Announcement before queue before start	This prompt is played before the call enters the ACD queue.
	Announcement on stop	This prompt is played, after recording is stopped.
Manual / can be switched on- off	Announcement on start	This prompt is played, before recording is started.
	Announcement on stop	This prompt is played, after recording is stopped.
Every x calls to agent / can be switched off (opt out)	Announcement on start	This prompt is played, before recording is started.
	Announcement on stop	This prompt is played, after recording is stopped.
Caler Opt-In by DTMF	Announcement Menu for Opt-In before Queue	This prompt is played during the caller Opt-In
	Announcement Recording On	This prompt is played, if recording is activated by caller Opt-In.
	Announcement Recording Off	This prompt is played, if recording is deactivated by caller Opt-In.
Call Monitoring	Announcement on start	This prompt is played, when call monitoring is started by a supervisor.

Prompt Management

On this tab basic settings for prompt management are made:

Standard Language	Here you specify which language should be used for agents announcements when the required language is not available in the system.
Whisper Announcements via the Service Number Setting	When this option is selected, the language of whisper announcements to agents is determined by the language of the service number, and not the selected language of the agents.
System Announcements via the Service Number Setting	When this option is selected, the language of system announcements to agents is determined by the language setting of the service number and not the configured language of the agents.

SalesForce

This tab control the way SalesForce is integrated with the jtel ACD. These settings must be setup and correct, if the integration is to function correctly.

See [SalesForce Client Master Data](#).

SAP

This tab control the way SAP is integrated with the jtel ACD. These settings must be setup and correct, if the integration is to function correctly.

See [SAP Client Master Data](#)

CRM+

This tab control the way CRM-System is integrated with the jtel ACD. This settings must be setup and correct, if the integration is to function correctly.

Confluence

This tab control the way jtel E-Mail client can be coupled with an Atlassian Confluence instance.

See [Confluence Client Master Data](#).

REST

This tab contains authentication information about the jtel REST API / TTS

REST v1 API: If you are using jtel REST API, here is where you create the bearer tokens for authentication. You can as well delete an existing one.

TTS: If the Client is using TTS, the TTS Secret generated while subscribing the Client to TTS Service is stored here.

Teams PBX Rules

This tab controls Teams PBX rules: The overall PBX user availability can depend or not from the Teams availability. Here you can:

Activate / Deactivate Teams PBX rules.

Regard as Busy when in Teams Activity: Comma separated Teams activities in which PBX Users availability will be busy. Example: DoNotDisturb,InACall. In that case, if the PBX user Teams activity is DoNotDisturb or InACall, the overall PBX user availability will be busy.

Regard as Available when in Teams Activity: Comma separated Teams activities in which PBX Users availability will be available. Example: Available. In that case, if the PBX user Teams activity is Available, the overall PBX user availability will be available.

P.S. Possible Teams activities are: Available, Away, BeRightBack, Blocked, Busy, DoNotDisturb, InACall, InAConferenceCall, Inactive, InAMeeting, Offline, OffWork, OutOfOffice, PresenceUnknown, Presenting, UrgentInterruptionsOnly.

Parameters

See this page for details: [Clients Parameters](#)