



SonataSuite

Sonata Communicator
Reference Guide Ver. 1.03

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Introduction

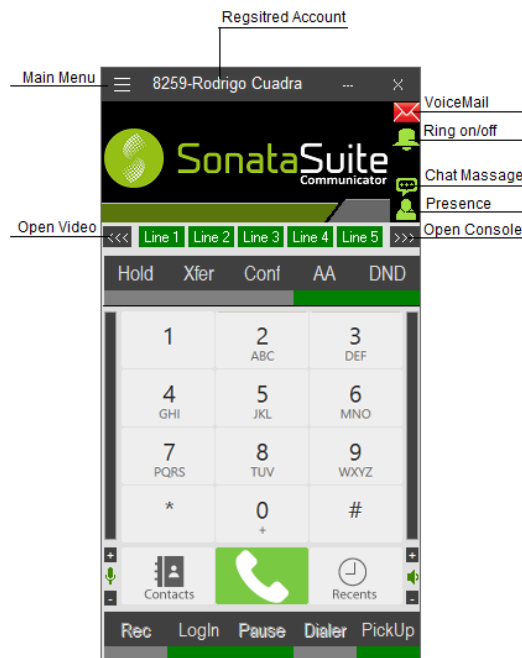
Sonata Suite is a set of programs that integrate with platforms based on Asterisk, below the list of these programs:

- SwitchBoard
- Billing System
- Recording Management System
- Call Center Reports
- Communicator

1. – Communicator

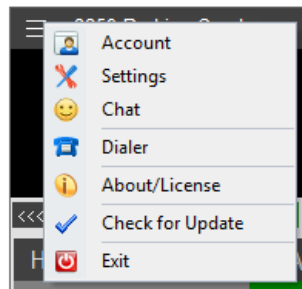
Sonata Communicator is a Windows Softphone that has the following features:

- LogIn/LogOut to Queues in a Button
- Pause with or without cause in a Button
- Chat
- Presence
- Call Recording
- PickUp Group Button
- Integrated Dialer
- Multiple Account
- Etc.



Menu

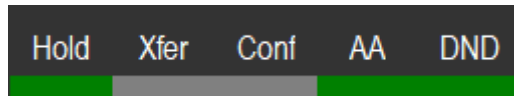
To configure the Softphone, it is necessary to press the Menu Button in the upper left. We will see the following options:





- **Account**, to configure the account(s) to register on the Softphone.
- **Settings**, configures all Softphone features.


- **Chat**, go to the chat interface.
- **Dialer**, this button is enabled only if the user has permission to configure the dialer.
- **About/License**, about Sonata Communicator. Install the license for the Business version.
- **Check for Update**, check if there is an update. If an update exists, you can proceed to install it.
- **Exit**, close the Softphone completely. Note: when pressing the top right button with an X, the Softphone is only minimized not to closed, the only way to close the Softphone is through this Button.


These are the call options, among which we have the following:




Hold,  When you receive a call, press the Hold button, it will automatically leave the caller on hold, if you want to retrieve the call again, you can press the Hold button again.

Xfer (Transfer),  To transfer a call after receiving it, simply put it on Hold, dial the number or extension to where you want to transfer it and press Xfer. If the person to whom you want to transfer the call does not want to be transferred, then resume the call by pressing the Hold button.

AA (AutoAnswer),  activating this option will automatically answer the calls as long as the PBX administrator has enabled this option on your softphone.

DND (Do Not Disturb),  Enabling this option you will not receive calls from any extension or external calls and a message will appear that your extension is not available.

Conf (Conference),  to create a three-way conference after receiving a call, simply press Hold, dial the number or extension you want to add to the conference, and press Conf.

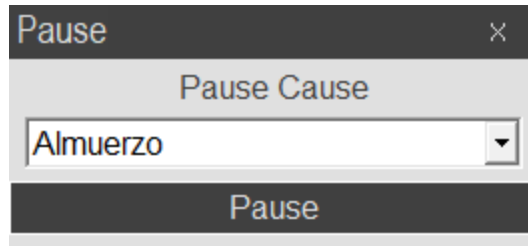
There are also other advanced functions that can be enabled by the PBX administrator when setting up your softphone, such as:



Rec, record call (In case this option is enabled for your softphone by the administrator).

Login, Login to a call queue (If there is a queue of calls and this part is enabled by the administrator).

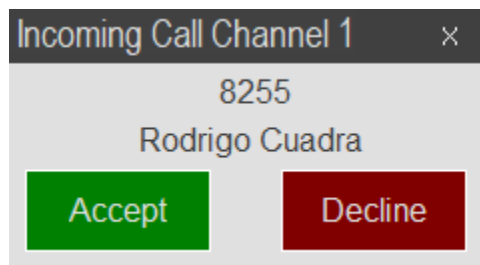
Pause, Changes the status of the queue agent to receive calls according to status (Pause, No Pause, Bathroom, Lunch, Rest). If the pause causes were configured, the following dialog will appear:



Dialer, it is an integrated automatic dialer that allows to make calls automatically by means of a list in .CSV format notifying some message. If there is a campaign set up this option is enabled, the user can start the Dialer or pause it by just pressing this button.

PickUp, if the prefix is set to a Pick-up Group in Settings, this option is activated, the user to presses this button, and then captures the call of the group that was configured in the PBX.

Receiving more than one call at the same time, if the call waiting option is enabled it is possible to receive more than one call at the same time. Upon receiving the call Popup screen will appear giving us the options of Accept, Ignore, or Decline. If we accept the second call the first one is put on hold, ignoring proceeds to mute the ringing and we can accept it by pressing the button of the line that is flashing.



1.1 Account Setting

Sonata Communicator allows you to create multiple Account with the possibility that every time you start the Softphone the user can select the account you want to use, which is very useful for Call Centers. To configure the accounts, go to Menu and select Account.

In the creation of an Account, we must configure the following fields:

- Account
 - Account Name, short name to identify the account.
 - Enabled, whether the account is enabled or not.
 - Display Name, name associated with the account.
- Registrar Settings
 - Domain, IP address or Host where the Softphone is going to register. This property sets registrar server, eg. 'callcentric.com', 'iptel.org' etc.
 - User, this property sets registration user name (SIP number, extension).
 - AuthID, this property sets authentication id. Use it, when registrar needs other id that differs from extension number.
 - Password, this property sets registration password.

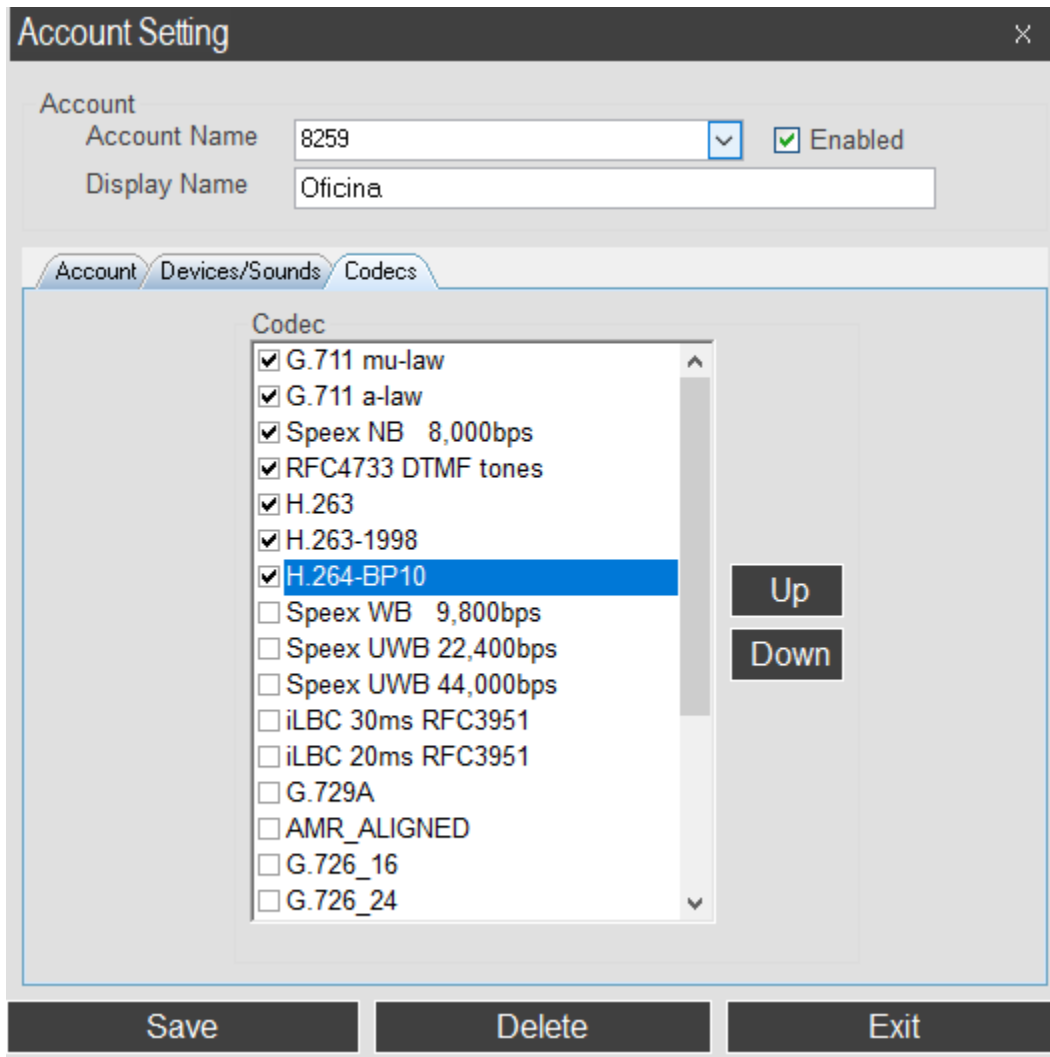
- Outbound Proxy
 - Proxy, this property sets outbound proxy domain.
 - User, this property sets outbound proxy username.
 - Password, this property sets outbound proxy password.
- SIP Settings
 - Listen Port, this property changes UDP port number that is used for send/receive SIP messages. By default, this value is equal to 5060.
 - STUN Server, this property sets STUN server. A STUN (Simple Traversal of User Datagram Protocol) server allows clients find out their public address, the type of NAT they are behind, and the internet side port associated by the NAT with a particular local port. value example: stun.ekiga.net
 - Expire Time, this property sets/gets expiration timeout. How long registration remains active, seconds, eg. '300'. Note: When this value is equal to 0, won't send REGISTER message. But 'RegDomain' and 'RegUser' values will be used for outgoing calls.
- Others
 - Ask Account in Start-Up, each time you start the Softphone you will be asked for the account to register.
 - Login Password, if the Ask Account in Start-Up option is activated, the user will be required to enter his/her Password in order to register the account.

Devices/Sounds

The screenshot shows the 'Account Setting' dialog box with the 'Devices/Sounds' tab selected. The 'Account' section includes 'Account Name' (8258) and 'Display Name' (Rodrigo Cuadra). The 'Devices' section has dropdown menus for 'Speaker' (Speakers / Headphones (Realtek -0)), 'Microphone' (Default), 'Video Device' (Webcam C170-1), and 'Network' (Auto). The 'Sounds' section features two sliders for 'Audio Default Level' and 'Microphone Default Level', both set to 50. Below the sliders are three checkboxes: 'Echo Cancellation', 'Noise Reduction', and 'Auto Gain Control', all of which are currently unchecked. At the bottom of the dialog are three buttons: 'Save', 'Delete', and 'Exit'.

- Devices
 - Speaker, default audio speaker.
 - Microphone, default microphone.
 - Video Device, default video for video call.
 - Network, default network interface.
- Sounds
 - Audio Default Level, default audio level.
 - Microphone Default Level, default microphone level.
 - Echo Cancellation, this property enables/disables echo cancellation.
 - Noise Reduction, this property enables/disables noise reduction.
 - Auto Gain Control, this property enables/disables auto gain control.
 - Ring Tone, this property allows set custom ring tone that plays when incoming call received.

Codecs

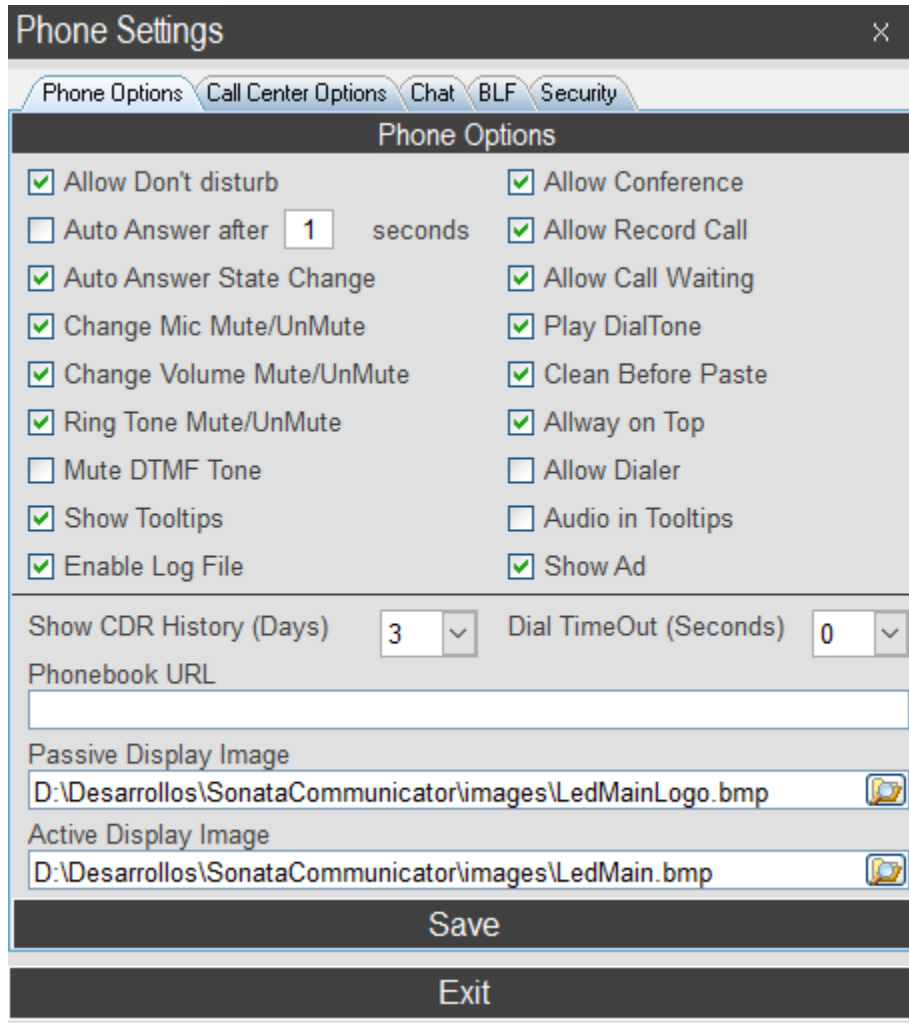


- Codec, check all codecs you want to support.

1.2 Setting

Sonata Communicator allows us to modify many options in the environment of the functionality of the Softphone, to modify these options it is necessary to go to Menu/Settings.

Phone Options



In Settings, we must configure the following options:

- Phone Options
 - **Allow Don't disturb**, enable DND at the Softphone level. It is not recommended that a Call Center Agent to have access to this option.
 - **Auto Answer after X seconds**, the call is answered automatically after the number of seconds set have past.
 - **Auto Answer State Change**, allows the user to enable/disable this option. It is not recommended that a Call Center Agent has access to this option.
 - **Change Mic Mute/UnMute**, enable the option to mute the microphone.
 - **Change Volume Mute/UnMute**, enable the option to mute the speaker.
 - **Ring Tone Mute/UnMute**, enable the option to mute the softphone ringtone.

- **Mute DTMF Tone**, sometimes when we dial a number the sound of the dialing is very annoying, when activating this option, the tone is not heard completely.
- **Allow Conference**, enables the possibility of conference.
- **Allow Record Call**, enables the possibility of recording the call on the computer where the Softphone is installed
- **Allow Call Waiting**, allows you to answer more than one call while you are busy with another call.
- **Play DialTone**, when you select this option you will hear a dial tone.
- **Clean Before Paste**, it is possible to copy and paste a phone number to expedite the dialing of the number, with this option enabled the deletion of any information is enabled before the new one is pasted.
- **Always on Top**, enables the option that the Softphone is always be above any other application.
- **Allow Dialer**, enables the configuration of the Dialer, very useful to make calls automatically. Later we will talk about how to configure the dialer that comes integrated with the Softphone.
- **Show Tooltips**, displays Tooltips when one is positioned above the field.
- **Audio in Tooltips**, when a Tooltips is activated, an audio is heard describing the information.
- **Enable Log File**, enables the creation of log files to determine any inconvenience with the Softphone.
- **Show Ad**, randomly displays an ad on the bottom of the Softphone.
- **Show CDR History (Days)**, CDR history days that will be displayed when a Call History is selected.
- **Dial Time Out (Seconds)**, permitted duration between dialed digits, the zero value is equivalent to infinity, another value is equivalent to when that time is reached the Softphone will dial the digits entered automatically.
- **Phonebook URL**, URL to import the Phonebook from the PBX (only compatible with VitalPBX)
- **Passive Display Image**, image to display when there is no activity on the Softphone.
- **Active Display Image**, picture to show when there is activity on the Softphone.

Call Center Options

Phone Settings

Phone Options / Call Center Options / Chat / BLF / Security

Call Center Settings **Features Codes**

Enable Agent Options

Login Code: QAL_8259,1 PickUp Group Code: *08

LogOut Code: QAL_8259,2 DND Code: DND_8259

Pause Code: QAP_8259,1 VM Code: *97,,8259#

UnPause Code: QAP_8259,2 Login at Startup:

Pause Reasons

Almuerzo
Baño
Cena

Description: _____

Dial: _____

Save Pause Delete Pause

Context: cos-all-custom

Create Script

Save

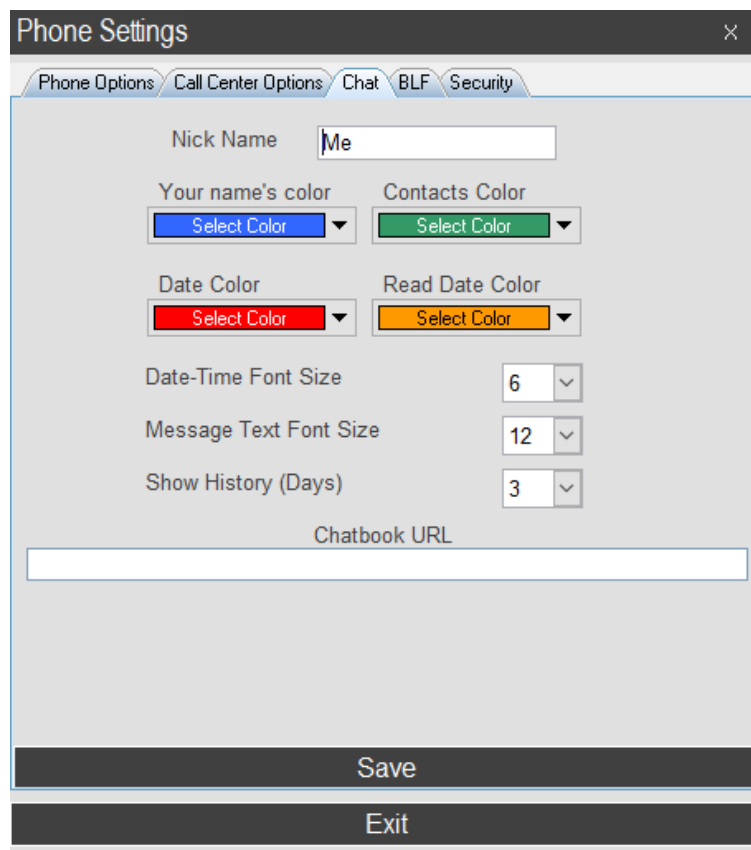
Exit

In Call Center Options, we must configure the following options:

- Call Center Options
 - **Enable Agent Options**, enable the Login/Pause options from the Softphone for the Agent
 - **Login Code**, if we are going to login all queues to which the Agent is registered as a Dynamic member, set "*50,1", if we are only going to log in a specific queue that is configured "*52,500,1". The comma (,) means wait one second after dialing the next value. Hints can also be used for this configuration, in the case of VitalPBX the Hints would be QAL_EXT, 1
 - **LogOut Code**, if we are going to logout all queues to which the Agent is registered as a Dynamic member, set "*50,2", if we are only going to log in a specific queue that is configured "*52,500,2". The comma (,) means wait one second after dialing the next value. Hints can also be used for this configuration, in the case of VitalPBX the Hints would be QAL_EXT, 2
 - **Pause Code**, if we are going to pause all queues to which the Agent is logged in, set "*51,1", if we are only going to pause a specific queue configured "*53,500,1". The comma (,) means wait one second after dialing the next value. Hints can also be used for this configuration, in the case of VitalPBX the Hints would be QAP_EXT, 1

- **UnPause Code**, if we are going to unpause all queues to which the Agent is logged in, set "*51,2", if we are only going to unpause a specific queue configured "*53,500,2". The comma (,) means wait one second after dialing the next value. Hints can also be used for this configuration, in the case of VitalPBX the Hints would be QAP_EXT, 2
- **Features Codes**
 - **PickUp Group Code**, for this option to work it is necessary that the agents are in the same pickup group, this option allows us to capture a call remotely by setting the prefix * 08. When this option is set, the pickup group button in the Softphone is enabled.
 - **DND Code**, code to enable/disable do not disturb. In VitalPBX it has the format of DND_EXT.
 - **VM Code**, code to consult voice mail, you can add the password as long as before you add a pair of commas as a 1 second pause. Example: * 97,,EXT#
 - **Login at Startup**, when this option is enabled after starting the Softphone the Agent is automatically logged in to the queue(s).
- **Pause Reason**
 - **Description**, brief description of the cause of pause.
 - **Dial**, prefix to dial to invoke this pause cause. When you dial this prefix in the log of the queue the cause of the pause will appear.
 - **Context**, context to which the Agents are associated, it is generally cos-all-custom.
 - **Create Script**, after having finished creating all pause causes it is necessary to create a script so it can be copied to the PBX (/etc/asterisk/ombutel/). If the agents had a Class of Service other than Cos All, please modify it in the script.

Chat



The screenshot shows the 'Phone Settings' dialog box with the 'Chat' tab selected. The settings are as follows:

- Nick Name: Me
- Your name's color: Select Color (Blue)
- Contacts Color: Select Color (Green)
- Date Color: Select Color (Red)
- Read Date Color: Select Color (Orange)
- Date-Time Font Size: 6
- Message Text Font Size: 12
- Show History (Days): 3
- Chatbook URL: (Empty text box)

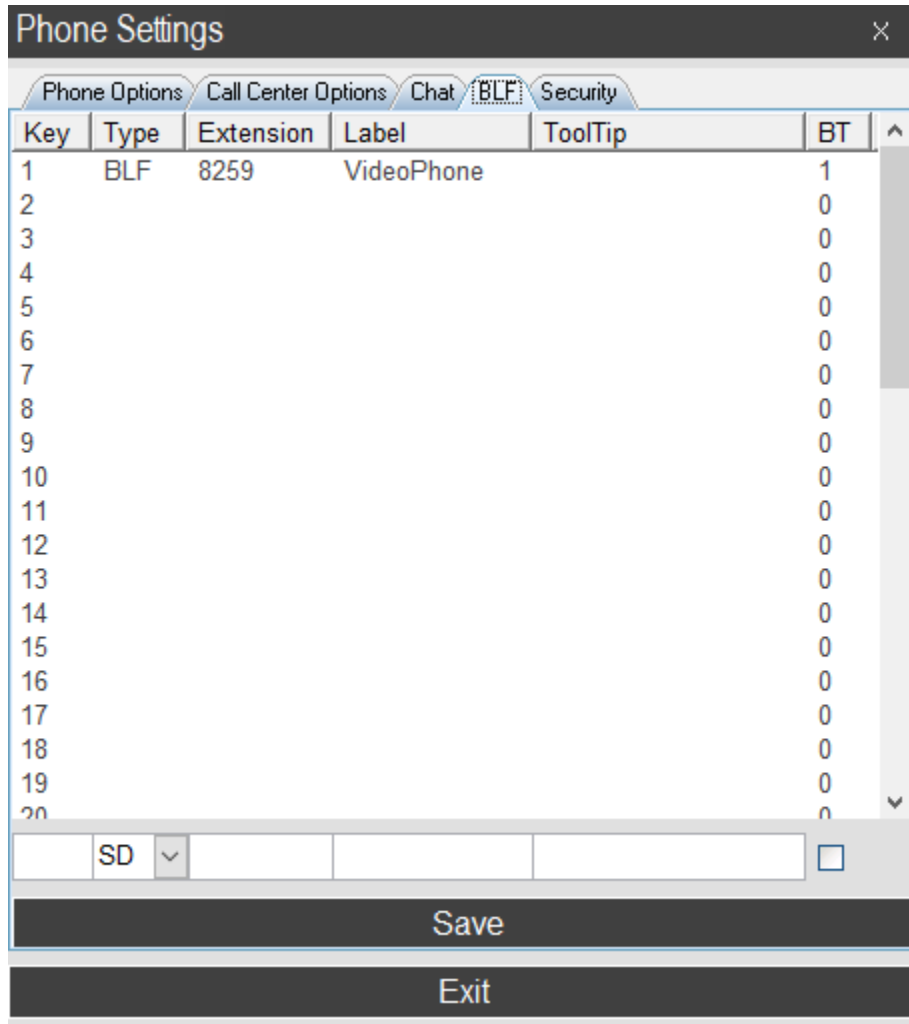
Buttons at the bottom: Save, Exit

Here you configure the chat interface as well as the Nick Name of the user

- **Nick Name**, Nickname that will be shown in my chat when you sent a message.
- **Your name's color**, the color of my nickname.
- **Contacts Color**, the nickname color of all my contacts.
- **Date Color**, the color of the date and time of the messages.
- **Read Date Color**, the color of the date and time of the messages when they have already been read.
- **Date-Time Font Size**, font size of the date and time of the messages
- **Message Text Font Size**, font size of the messages.
- **Show History (Days)**, message history days that will be displayed when a contact is selected
- **Chatbook URL**, URL to synchronize with VitalPBX contacts.

BLF

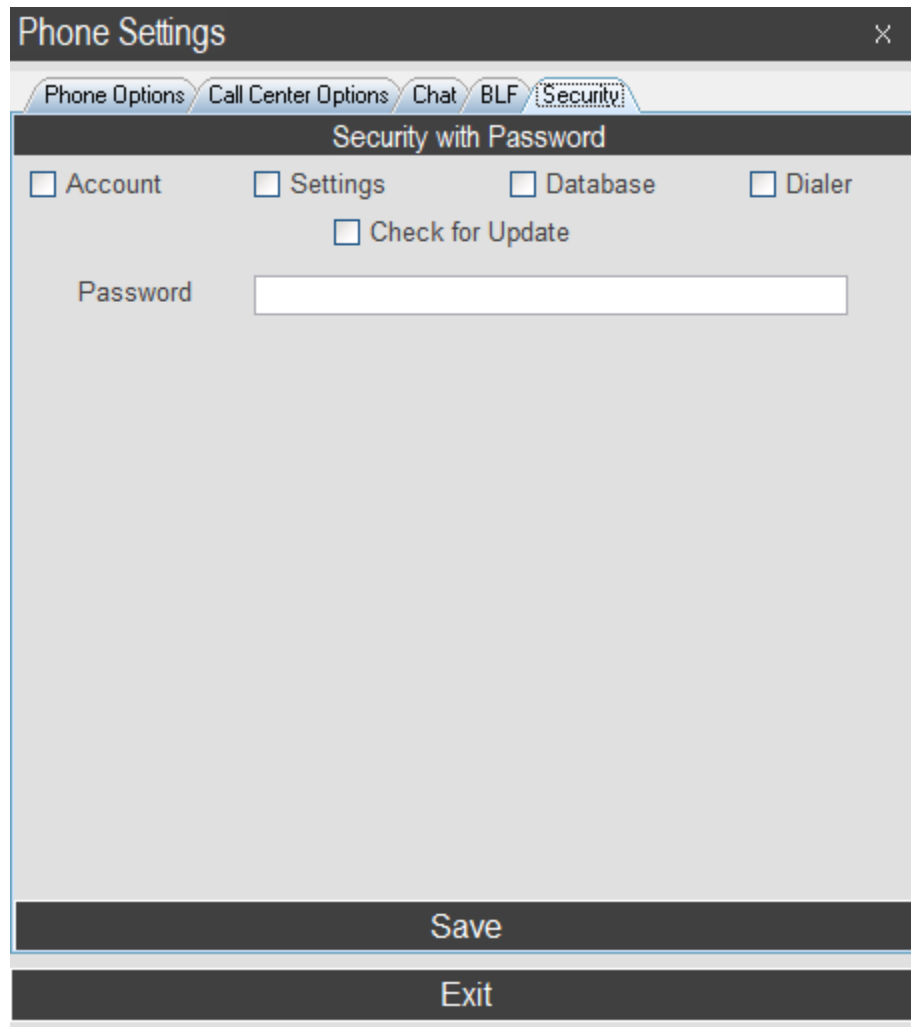
Sonata Communicator has a console with 50 programmable keys in Speed Dialing or BLF type. Here we can program the console completely.



In BLF, we can configure the following options:

- **Key**, key number you are configuring.
- **Type**, BLF--> Busy Lamp Field, and SD--> Speed Dialing.
- **Extension**, number to configure. Remember that if it is an external number you must add the output prefix to the beginning of the number (eg: for 22704590, it would be 922704590)
- **Label**, brief description to identify the configured number.
- **Tool Tip Text**, more detailed description of the configured number, remember that this text will only be shown when you hover over the key.
- **BT**, Blind Transfer, if you want transfers to this number to be unattended.

Security



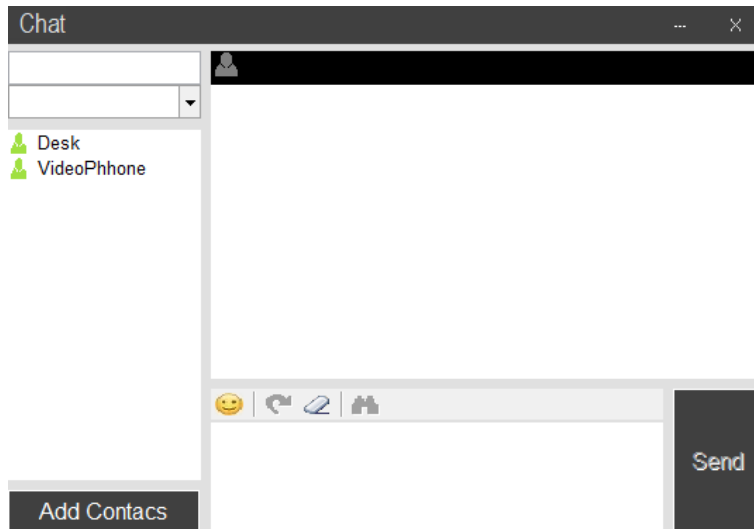
The screenshot shows a 'Phone Settings' dialog box with a 'Security' tab selected. The 'Security with Password' section contains five checkboxes: 'Account', 'Settings', 'Database', 'Dialer', and 'Check for Update'. Below these is a 'Password' label and an empty text input field. At the bottom of the dialog are 'Save' and 'Exit' buttons.

In Security with Password, we can configure the following options:

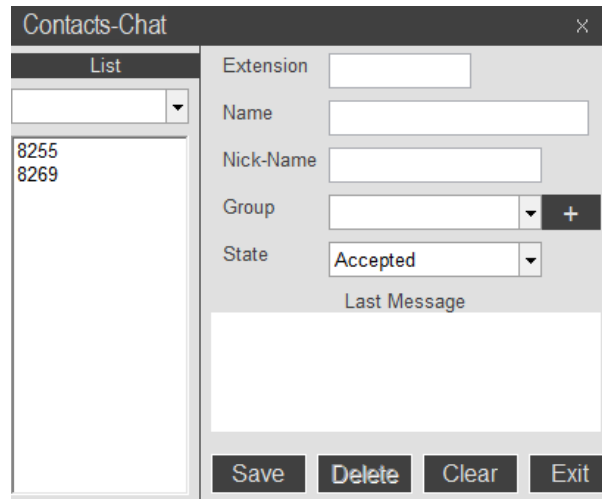
- **Account**, enable the ability to configure Accounts.
- **Settings**, enable the ability to configure Settings.
- **Database**, protects databases with a password.
- **Dialer**, enables the option of using the built-in Dialer to create outbound call campaigns.
- **Check for Update**, enable the ability to Check for Update.
- **Password**, password to enter the selected options.

1.3 Chat

Sonata Communicator includes a Chat system that works on the SIP protocol.



You can add contacts by pressing the Add Contacts button.



The contact options are:


- **Extension**, extension number associated with the contact
- **Name**, name associated with the contact
- **Nick-Name**, short name with which the contact will be identified in the Chat.
- **Group**, group to which the contact belongs.
- **State**, contact status, can be:
 - **Accepted**, contact available for chat.
 - **Request**, contact that you have requested that you accept it. Accept pending.
 - **Block**, blocked contact, all messages received from this contact will be ignored.
- **Last Message**, shows the last message received from this contact.

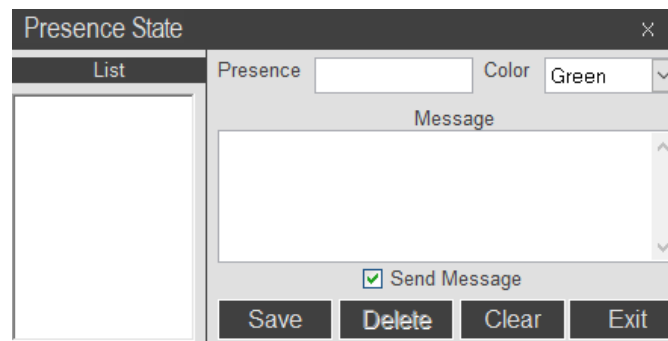
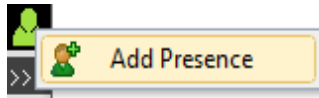
1.4 Presence

Sonata Communicator includes Presence, by monitoring the status of contacts. It is also possible to associate a manual presence status by sending a message automatically when we are required through the Chat.

The possible states of the extensions are:

- **Ready**, the extension is available (green icon).
- **Busy**, the extension is busy or in a no-disturb state (red icon).
- **Ring**, the extension is ringing (orange icon).

You can customize presence states associated with messages to send when you receive a chat from a contact. Press  in the softphone for set or add new Presence.

A dialog box titled "Presence State" with a close button (X) in the top right. It has a "List" column on the left and a main configuration area on the right. The main area includes a "Presence" text input field, a "Color" dropdown menu set to "Green", and a "Message" text area. Below the message area is a checkbox labeled "Send Message" which is checked. At the bottom are four buttons: "Save", "Delete", "Clear", and "Exit".

The options are:

- **Presence**, brief description of the state of the presence.
- **Color**, icon color show when this presence is selected.
- **Message**, message to send automatically to the person you want to contact us. This message is sent if "Send Message" is selected.
- **Send Message**, if you want to send the previously configured message to the moment that a person wants to contact us.

1.5 Dialer

Sonata Communicator brings a built-in Dialer to make outgoing calls, this dialer speeds dialing of phones that were previously loaded from a CSV file. Each time the Softphone makes a call, a popup appears with a previously configured form where the customer's information will be displayed, and the Agent can register any comments and catalog if the call is successful or not. Once the campaign is finished, it is possible to obtain the results of the campaign.

In the Dialer, we must configure the following options:

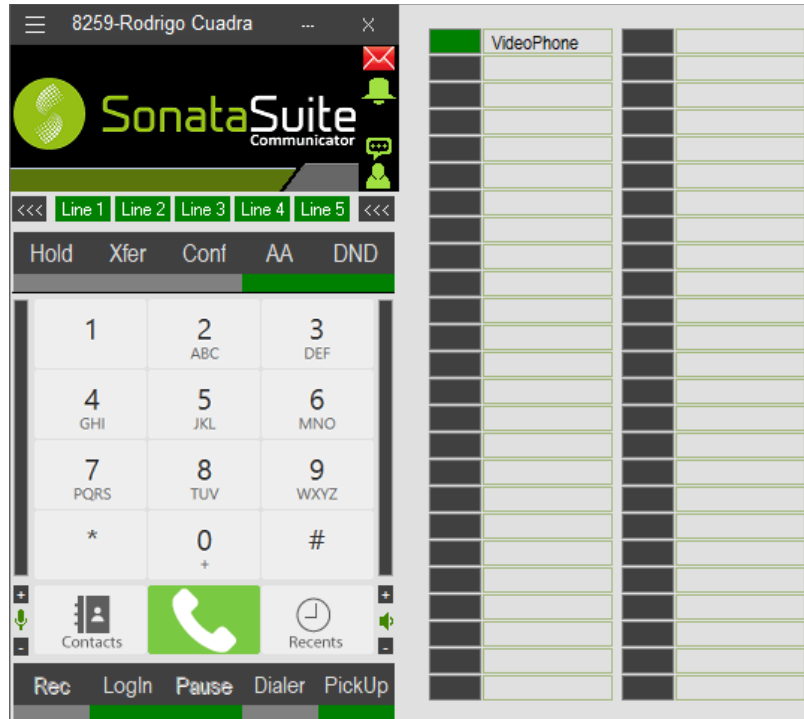
- Dialer Options
 - List Name, short name to describe the campaign.
 - Wrap-Up Time, waiting time between calls. Allows the Agent to do some activity to close the last call.
 - Close form when saving, in each call a popup form appears that the Agent must fill, when selecting this option, the form will be closed at the moment of saving the information. This streamlines Agent management.
- Import CSV file name,
 - Import File, the CSV file must have the titles in the first line, and can have up to 6 columns besides the phone number, that should always go in the first column. Remember that if it is necessary to dial a prefix such as "9", it must be added to the telephone number before importing the list.
 - 01 – 06, in the first line of the CSV file it is necessary to write the titles, these will look like they do here, you can modify them once the list is loaded.
- Final Cause
 - Default, the cause of the end of the call by Default.
 - Description, brief description of the end of the call.
 - Type, type of end of the call, Positive, Negative or Call Later. In the case of Call Later a calendar will appear to reprogram the call.

POPUP

If you select an end that is configured with the Call Later option, the next option will appear when you press the Save button. Here you must set the day and time that you will call the contact again.

1.6 Console

Sonata Communicator integrates a 50-key BFL and Speed Dial console key. You can see it by pressing the >>> button. To modify or add a number go to Settings menu, tab BLF. You can also configure by double clicking on the Label space.









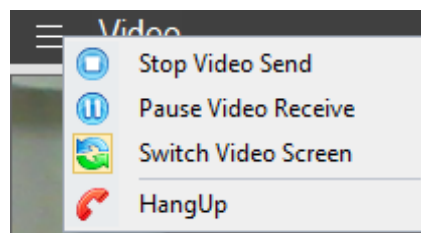
1.7 Video

Sonata Communicator includes Video Call. To activate this option, it is necessary to select the Video Camera to be used in the Account configuration.



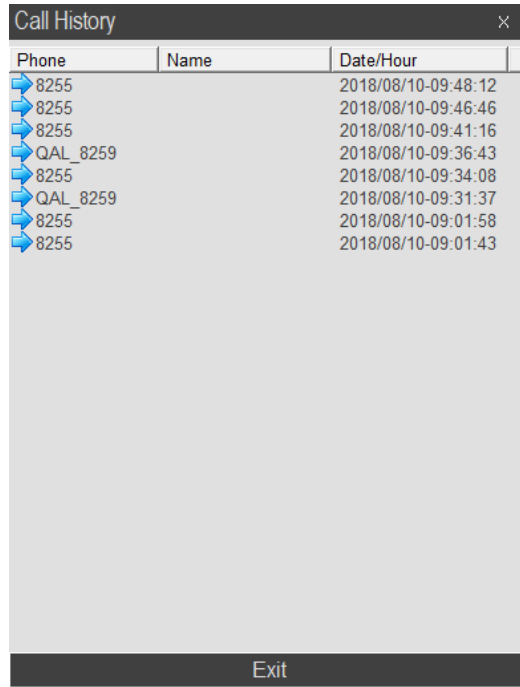
The available options are:

- Close() , completely closes sending and receiving video.
- Detach() , it makes the video screen of the Softphone independent, with the possibility of expanding it at will
- Attach() , attach the video screen to the Softphone.
- Max() , maximizes the video screen.
- Min() , normalize the video screen.
- Menu() ,
 - Stop Video Send, stop sending video.
 - Pause Video Receive, stops video reception.
 - Switch Video Screen, exchange the size of the video received with the one sent.
 - HangUp, ends the video call.



1.8 Call History

History displays the last calls received or made.



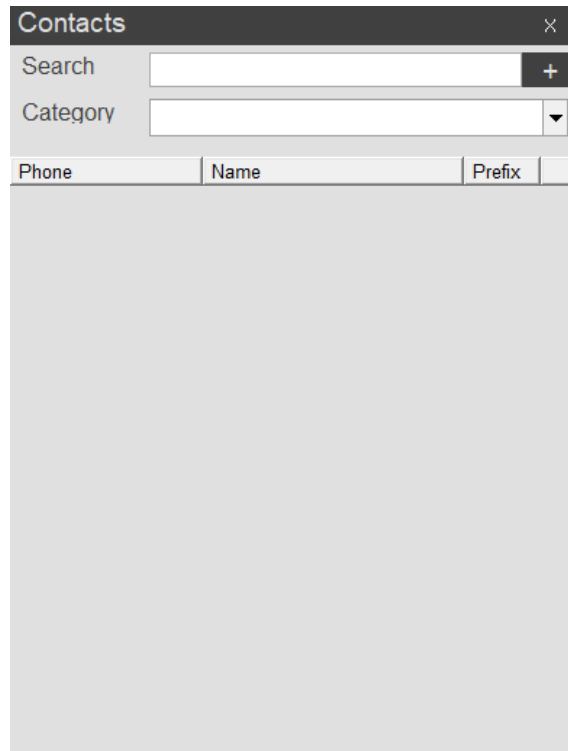
Phone	Name	Date/Hour
8255		2018/08/10-09:48:12
8255		2018/08/10-09:46:46
8255		2018/08/10-09:41:16
QAL_8259		2018/08/10-09:36:43
8255		2018/08/10-09:34:08
QAL_8259		2018/08/10-09:31:37
8255		2018/08/10-09:01:58
8255		2018/08/10-09:01:43

Exit

Double click on the record to call the number.


1.9 Directory

Sonata Communicator integrates a Directory which can be consulted by phone or name. This directory is also useful for identifying the most common incoming calls.



The screenshot shows a window titled "Contacts" with a close button (X) in the top right corner. Below the title bar, there is a "Search" input field with a "+" button to its right. Underneath the search field is a "Category" dropdown menu. At the bottom of the window, there is a table with three columns: "Phone", "Name", and "Prefix". The table body is currently empty.

In Directory, we must configure the following options:

- Search Space, search for a contact, it can be a phone number, name or last name.
- Category, filter by Category.
- Add/Edit Contacts, by pressing the + button (), you can edit or add new contacts.
- Phone, phone to include in the directory.
- Name, name associated with the phone. When we receive a call from this phone on the display of the Softphone will appear this name.
- Prefix, output prefix to call this phone, generally "9" or "0" is used.