



User Guide

3CX Competitive Wallboard

Version 15.0.9

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Introduction

Improving the performance of calling agents who fail to meet the set performance criteria is one of the biggest challenges for managers. **3CX Competitive Wallboard** software enables you to improve your agent's performance by motivating a competitive culture to yield high performance. Through this software, the agents can come to know about the top performing agents for the day and this encourages them to compete beyond just hitting the minimum target in order to rank at the top.

What is 3CX Competitive Wallboard?

3CX Competitive Wallboard is agent performance monitoring software that motivates a competitive spirit among the agents by displaying the performance ranking data for the day and month. The user at manager level can edit data while the agents can only view. As a manager, you can create agents, set profile picture, associate the agents to an extension for calling, set daily and monthly call quota, activate or inactivate an agent and export call logs in various formats.

Why 3CX Competitive Wallboard?

1. Motivate competitive spirit among agents and help them perform better by providing them with the feedback they can understand.
2. Encourage agents to compete beyond reaching the minimum targets will help yielding high performance.
3. Set daily and monthly quota so that the agents can know if they met the required target for the day or month.

How to use 3CX Competitive Wallboard?

To include an agent's performance in the ranking data, you need to create an agent, associate the agent with 3CX Phone extension and set day wise and month wise quota. The agent will then be ready to start calling your customers. With 3CX Competitive Wallboard, a manager can set/edit the agent's quota, activate/deactivate agent, edit profile picture and export the call logs to the preferred format among the available formats.

Prerequisites

Before installing 3CX Competitive Wallboard, you need to ensure that your computer meets the minimum requirements mentioned below:

1. 3CX Version 14
2. Windows 7 – 10 Pro or Windows Server 2008 R2 (64 bit) and above
3. SQL Server 2008 or above (Including the free SQL Express edition)
4. Microsoft .Net 4.5
5. VoIPTools' 3CX Relay Service installed on the 3CX server
6. Microsoft Internet Information Server (IIS) version 7 and above
7. Installation on a domain controller may require additional assistance

Installation

1

Download software

You can order 3CX Competitive Wallboard on-line at <http://www.voiptools.com>. Your order confirmation email will include your license key and a link to download the software.

2

Install Prerequisites

There are a number of prerequisites that must be installed prior to installing 3CX Competitive Wallboard. These prerequisites include Microsoft Internet Information Server (IIS) and Microsoft SQL Server.

3

Install 3CX Competitive Wallboard

This User Guide contains step-by-step instructions to successfully install 3CX Competitive Wallboard. Begin by extracting the installer from the downloaded zip file (Step 1 above), then run the setup program named **CompetitiveWallboardInstaller.exe**

4

Register your License Key

You must register your license key to activate 3CX Competitive Wallboard. Your license key is included in your order confirmation email, and can also be found in your order history on our website.

Step by step Installation Procedure

The following section guides you through a detailed walk-through of the installation process.

Step 1: Download 3CX Competitive Wallboard

You can check for the software download link included in your order confirmation email. As an alternative, you can also find the link from your order history on our website.

Step 2: Extract the installer from the downloaded .zip file

The file you downloaded in the above step is a compressed .zip file.

1. Position the mouse on the zip file and right-click.
2. From the popup menu, select **Extract All** to extract the software.

Step 3: Start the installation process

1. From the extracted folder, find the file **CompetitiveWallboardInstaller.exe**
2. Double-click the file to start the VoIPTools Setup Wizard.



Figure 1: VoIPTools 3CX Competitive Wallboard Setup Wizard

3. Click **Next** to continue.

**Special note for Multi-tenant installations:**

1. *If you are installing 3CX Competitive Wallboard on a 3CX Cloud (Multi-tenant) server, an additional screen will display with a combo box containing a list of all installed tenants. Select the correct tenant and continue.*
2. *If you are installing 3CX Competitive Wallboard on a separate server and pointing it to a 3CX Cloud server, you will need to tell the installer the name of the specific tenant desired. Start the installer from a command window and include an additional parameter: `tenantname=<your-tenant-name>`. Passing the tenant name to the installer will pre-fill the combo box with the correct tenant name.*

*For example: **3CXCompetitiveWallboardInstaller.exe tenantname=the3CXtenantname***

Step 4: Download the VoIPTools 3CX Relay (if required)

3CX permits one 3rd party application to communicate with the 3CX server at a time. To overcome this limitation, VoIPTools created the 3CX Relay Service. The Relay is a lightweight application that is installed directly on the 3CX server. The Relay exposes the 3CX Call Control API (and other VoIPTools services) to all our applications, and manages requests and events between by VoIPTools products and 3CX. The Relay also makes it possible to install our VoIPTools products on a remote server (including over the internet).

1. If you have not previously installed the Relay on your 3CX Server, you can download the Relay installer by clicking on the **Download Relay** button. The Relay must be installed directly on the 3CX server.
2. If you are installing 3CX Competitive Wallboard directly on the 3CX server, you can install the Relay simply by clicking the **Install/ Upgrade Relay** button and following the Relay install instructions.



If you have already installed the Relay, you need not install it again unless a newer version is required.

Step 5: Test the VoIPTools 3CX Relay Settings

1. In the **Relay Services Host** field, enter “localhost” if installing 3CX Competitive Wallboard on the 3CX server. If 3CX resides on a different server, enter the IP address or FQDN of the 3CX server.
2. In the **Relay Services Port** field, enter the value as **8700**

**Note**

The default port number is 8700 but will likely be different in multi-tenant environment

3. Click **Test Relay** Settings to confirm 3CX Competitive Wallboard can communicate with the Relay services running on the 3CX server.



Figure 2: Test VoIPTools 3CX Relay settings

4. Click **Next** to continue the installation.

Step 6: Configure the database

1. When prompted for the database connection information, click **Configure** button.



Figure 3: Configure Database

2. In the **Connection Properties** dialog box, enter the SQL server name. If using the free SQL Express edition, the default SQL Instance name is <your-server-name>\SQLExpress.



If SQL Server is installed on a server other than the server where 3CX Competitive Wallboard is installed, you will need to configure SQL Server to allow remote connections.

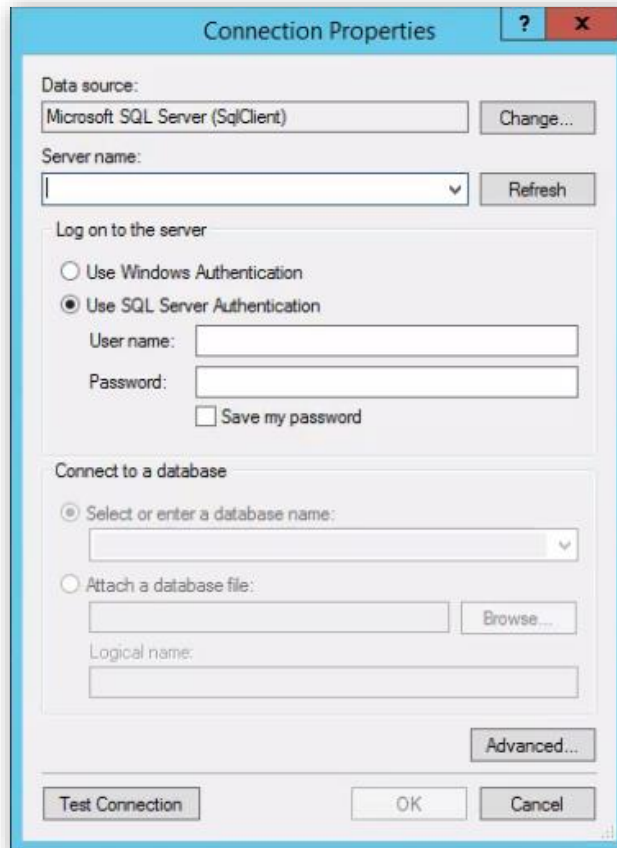


Figure 4: Connection Properties

3. Enter the login credentials. If using Windows integrated security, select **Use Windows Authentication**. The VoIPTools installer will create a local windows user name as “VoIPToys” and will give sufficient rights to this user to create / update the SQL database. If SQL Server authentication is desired, select **Use SQL Server Authentication**. Be sure to select a SQL Login that has sufficient permissions to alter the database and create SQL objects.



*The first time you install 3CX Competitive Wallboard, **DO NOT** enter a database name. Choose **Select or enter a database name** and leave the database name blank. The installer will create the SQL database automatically and apply the necessary permissions. If upgrading 3CX Competitive Wallboard from a previous version, select the existing database from the list.*

4. Click **Test Connection** button
5. Click **OK** to close the test results dialog
6. Click **Next** to continue the installation



Figure 5: Configure Database

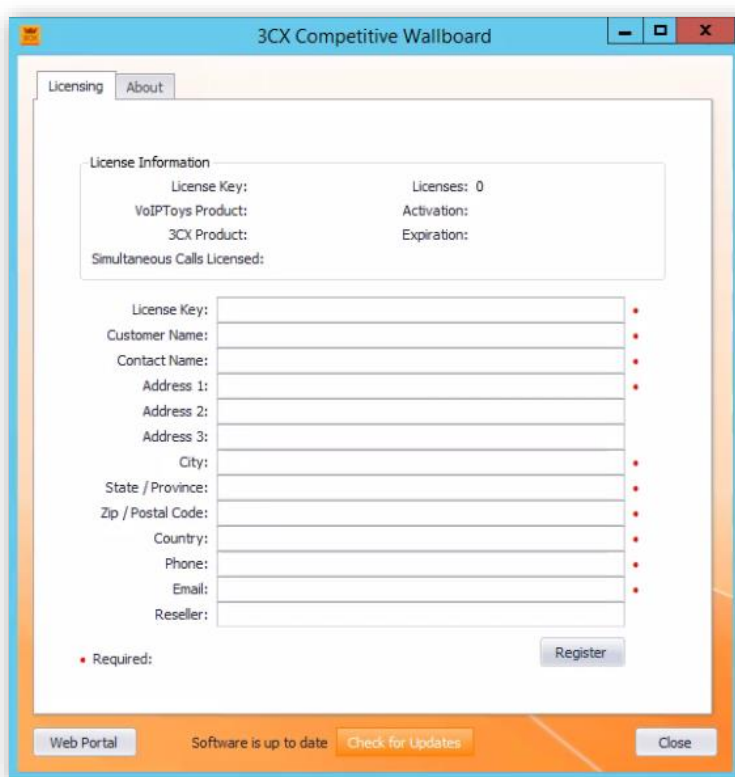
7. When the software installation is complete, click **Run Application**



Figure 6: Run Application

Step 7: Register

1. On the **3CX Competitive Wallboard** configuration screen, enter your registration information in all the required fields (Note the red dot denotes a required field).
2. Click **Register**



The screenshot shows the 'Licensing' tab of the 3CX Competitive Wallboard configuration screen. The window title is '3CX Competitive Wallboard'. The 'Licensing' tab is active, and the 'About' tab is also visible. The form contains the following fields and information:

- License Information:**
 - License Key: [Empty field]
 - VoIPToys Product: [Empty field]
 - 3CX Product: [Empty field]
 - Simultaneous Calls Licensed: [Empty field]
 - Licenses: 0
 - Activation: [Empty field]
 - Expiration: [Empty field]
- Registration Fields:**
 - License Key: [Empty field] *
 - Customer Name: [Empty field] *
 - Contact Name: [Empty field] *
 - Address 1: [Empty field] *
 - Address 2: [Empty field] *
 - Address 3: [Empty field] *
 - City: [Empty field] *
 - State / Province: [Empty field] *
 - Zip / Postal Code: [Empty field] *
 - Country: [Empty field] *
 - Phone: [Empty field] *
 - Email: [Empty field] *
 - Reseller: [Empty field]

A legend indicates that a red dot (*) denotes a required field. A 'Register' button is located at the bottom right of the form. At the bottom of the window, there are buttons for 'Web Portal', 'Software is up to date', 'Check for Updates', and 'Close'.

Figure 7: License

Step 8: Check for Updates

The **Check for Updates** button on the **License** tab enables you to easily download the latest version of 3CX Competitive Wallboard. If a newer version of 3CX Competitive Wallboard is available, the message will indicate that a newer version is available. Clicking the button will automatically download a .zip file of the latest version of the software. You can install the new version directly over the top of a previous version without the need to uninstall the previous version.

Web Portal

To access the 3CX Competitive Wallboard web portal, click the **Web Portal** button on the configuration program, or click on the desktop icon that was created during the installation process (3CX Competitive Wallboard Web).

Login to Web Portal

When connecting to the web portal, you will be asked to provide login credentials:

1. In the **Extension** field, enter your 3CX extension number
2. In the **PIN** field, enter your 3CX Voicemail PIN
3. Click **Login** button to login to your account

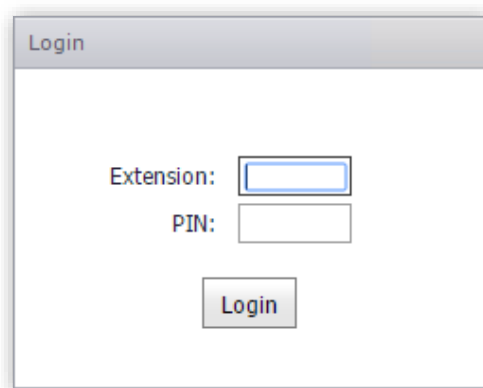


Figure 8: 3CX Competitive Wallboard Web Portal Login

Setting up the Wallboard

Wallboard Introduction

Selecting the **Wallboard** menu option displays the list of all the active agents of the saved extension group and their current call statistics. Here, you can view which agent has made the most calls and who has met their call quotas.

This section explains you about the features of **Wallboard** screen:

Picture	Extension	Agent Name	Outbound Calls		Outbound Quota		Average Length		Talk Time			Outbound Attempts	Total Calls		On Phone
			Day	Month	Day	Month	Inbound	Outbound	Inbound	Outbound	Total		Inbound	Outbound	
	2117	Ankit Bibekar	7	7	8	25	00:00:00	00:00:36	00:00:00	00:04:18	00:04:18	7	0	7	
	2123	Ram Mohan	7	7	3	15	00:00:00	00:00:18	00:00:00	00:02:12	00:02:12	8	0	7	
	2110	Sushil S Sushil Sen	6	6	2	3	00:00:00	00:00:32	00:00:00	00:03:15	00:03:15	6	0	6	
	2124	Nagendra Babu	4	9	8	9	00:00:00	00:00:42	00:00:00	00:03:33	00:03:33	4	0	4	
	2111	Hari Hari krishna	0	0	5	10	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0	0	0	

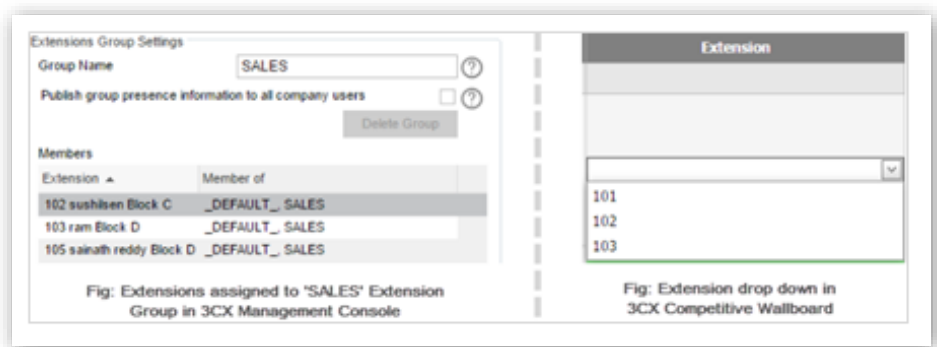
Figure 9: Wallboard showing agents, call quota and agents who met call quota

- A user assigned with either the 'manager' or 'agent' role can view the data in **Wallboard** screen.
- The agent with the highest call count for the day will be moved to the top of the list, irrespective of reaching their call quota or not.
- If the daily call count for any two agents is the same, then the agent with the highest **Outbound Talk Time** for the day will be displayed above the other agent.
- If an agent has not yet met their quota, their quota will be displayed in red.
- Once the call quota is reached for any agent, the color will change to green.
- **Day Outbound Quota** represents the call quota of an agent for the day.
- **Month Outbound quota** represents the call quota of an agent for the month.
- **Inbound Average Length** represents the average inbound talk time of an agent for the day.
- **Outbound Average Length** represents the average outbound talk time of an agent for the day.
- **Inbound Talk Time** represents the total talk time of all the answered inbound calls of an agent for the day.
- **Outbound Talk Time** represents the total talk time of all the answered outbound calls of an agent for the day.

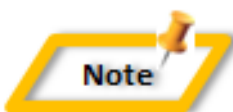
- **Total Talk Time** represents the sum of **Inbound Talk Time** and **Outbound Talk Time** of an agent for the day.
- **Outbound Attempts** represent the number of outbound call attempts made by an agent for the day.
- **Inbound Total Calls** represent the number of answered inbound calls for the day.
- **Outbound Total Calls** represent the number of answered outbound calls for the day.
- **On Phone** column displays the status of a call for an agent while the call is in progress. The status is generally 'dialing', or 'connected'. If the call disconnects then the call status is cleared.

3CX Extension Group

A 3CX Extension Group is needed to identify which extensions should be monitored for outbound call activities. A Wallboard manager is created by assigning the 'manager' role to a specific extension in the extension group.



You can create an extension group and assign multiple extensions to it. *Figure 10: Extensions assigned to a group in 3CX Management Console will be displayed in extension dropdown in 3CX Competitive Wallboard*



A single extension can exist in more than one extension group.

Manager Rights

- A manager can view and access data in all the menu options available in the Competitive Wallboard web portal.

The screenshot shows the 'WALLBOARD' interface with a navigation menu (Wallboard, Agents, Reports, Settings, About) and a user profile (2110 Sushil S Sushil Sen, Logout). The main content is a table with the following columns: Picture, Extension, Agent Name, Outbound Calls (Day, Month), Outbound Quota (Day, Month), Average Length (Inbound, Outbound), Talk Time (Inbound, Outbound, Total), Outbound Attempts, Total Calls (Inbound, Outbound), and On Phone. The table contains five rows of agent data with colored call counts.

Picture	Extension	Agent Name	Outbound Calls		Outbound Quota		Average Length		Talk Time			Outbound Attempts	Total Calls		On Phone
			Day	Month	Day	Month	Inbound	Outbound	Inbound	Outbound	Total		Inbound	Outbound	
	2117	Ankit Bibekar	7	7	8	25	00:00:00	00:00:36	00:00:00	00:04:18	00:04:18	7	0	7	
	2123	Ram Mohan	7	7	3	15	00:00:00	00:00:18	00:00:00	00:02:12	00:02:12	8	0	7	
	2110	Sushil S Sushil Sen	6	6	2	3	00:00:00	00:00:32	00:00:00	00:03:15	00:03:15	6	0	6	
	2124	Nagendra Babu	4	9	8	9	00:00:00	00:00:42	00:00:00	00:03:33	00:03:33	4	0	4	
	2111	Hari Hari krishna	0	0	5	10	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0	0	0	

Figure 11: Manager Login screen showing all the menu options

- Activate/ deactivate an agent.
- Set day and month call quota for any agent.
- Configure font size for wallboard screen.
- Specify the 3CX Extension Group to monitor.
- Set 'Minimum Call Duration' (in seconds) for an extension group so that a call can stand eligible for call count only after it reaches the set time.
- Set 'Work hours type' for an extension so that the calls made in the set working hours will stand eligible for call count.
- Reorganize the order of columns in the wallboard screen except that the 'Picture' column is always the first one.
- Hide one or more columns in the wallboard screen except 'Picture' column.
- Export reports in various available formats.
- Create filter to search call logs of the agents for a specific day (24 hours) of the current month.

Agent Rights

- Agents can view only **Wallboard** and **About** screens
- An agent cannot edit any data.

The screenshot shows the 'WALLBOARD' interface with a table of agent performance data. The table has columns for Picture, Extension, Agent Name, Outbound Calls (Day, Month), Outbound Quota (Day, Month), Average Length (Inbound, Outbound), Talk Time (Inbound, Outbound, Total), Outbound Attempts, Total Calls (Inbound, Outbound), and On Phone. The data is as follows:

Picture	Extension	Agent Name	Outbound Calls		Outbound Quota		Average Length		Talk Time			Outbound Attempts	Total Calls		On Phone
			Day	Month	Day	Month	Inbound	Outbound	Inbound	Outbound	Total		Inbound	Outbound	
	2117	Ankit Bibekar	7	7	8	25	00:00:00	00:00:36	00:00:00	00:04:18	00:04:18	7	0	7	
	2123	Ram Mohan	7	7	3	15	00:00:00	00:00:18	00:00:00	00:02:12	00:02:12	8	0	7	
	2110	Sushil S Sushil Sen	6	6	2	3	00:00:00	00:00:32	00:00:00	00:03:15	00:03:15	6	0	6	
	2124	Nagendra Babu	4	9	8	9	00:00:00	00:00:42	00:00:00	00:03:33	00:03:33	4	0	4	
	2111	Hari Hari krishna	0	0	5	10	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0	0	0	

Figure 12: Agent Login screen showing limited menu options

Create 3CX Extension Group

1. Log into 3CX Management Console as a manager
2. From the 3CX Server Manager section, select **Extensions**
3. On the tab bar, click **Add Group**
4. In the **Members** tab, under **Extensions Group Settings**, in the **Group Name** field, enter the group name

Assign Extensions to 3CX Extension Group

1. From the **Extension** list, select the extension that you want to add to the extension group that you just created and click **Add**

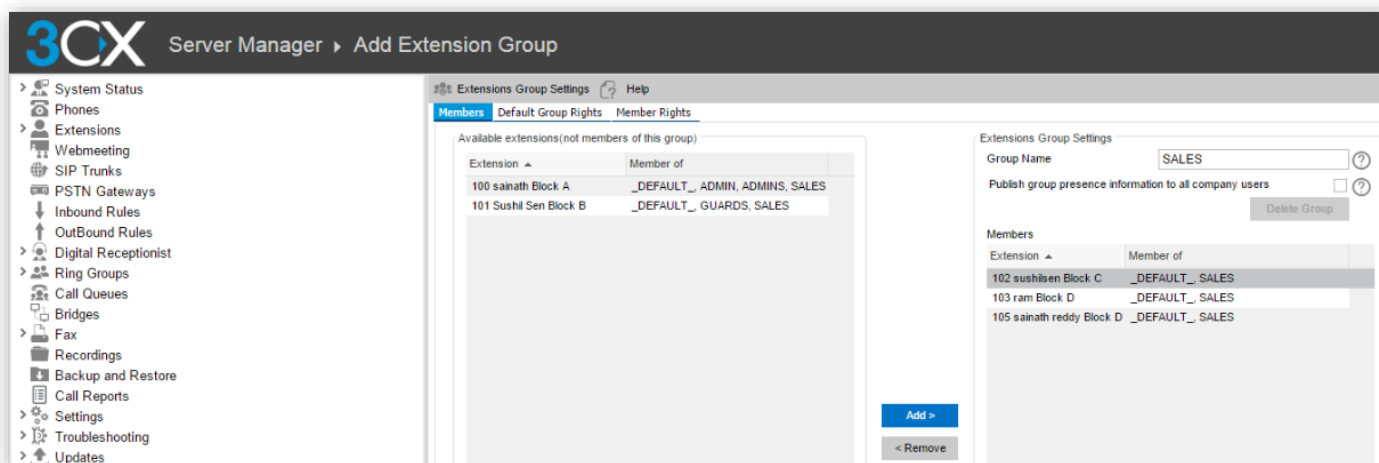


Figure 13: Add Extension Group

2. Repeat step 1 for all the extensions that you want to assign to the extension group
3. Click **Apply** and then click **OK**

Agents

Selecting the **Agents** menu option displays the Agents Information screen. Here, you can create/ activate/ deactivate an agent, set call quotas, and upload an image for an agent.

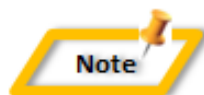
- The screen displays both active and inactive agents.
- Only the user with 'manager' role can view **Agents** screen.
- You can create multiple agents (batch edits) before you save the data.

Extension	Agent Name	Active	Day Quota	Month Quota	Picture	Photo
101		<input type="checkbox"/>				No Image
102		<input checked="" type="checkbox"/>	10	100	102.jpg	No Image
101		<input checked="" type="checkbox"/>	2	20	101.jpg	No Image
100	sanath Block A	<input checked="" type="checkbox"/>	23	500	113.jpg	

Figure 14: Agents Screen showing how to create and set call quota for agents

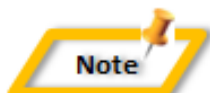
Add a New Agent

1. On the menu bar, click **Agents**
2. In the **Agents Information** screen, click to add a new agent.
3. From the **Extension** drop down, select the extension for the agent.




The **Extension** dropdown displays the extensions that belong to the extension group you created in the 3CX Management Console

4. Check the **Active** check box to activate the agent.
5. In the **Day Quota** text box, type the number of calls an agent must make each day to meet their quota.
6. In the **Month Quota** text box, type the number of calls an agent must make each month to meet their quota.
7. From the **Picture** drop down, select the image that you want to display for the agent.
8. Click **Save changes** to save the settings.



You can create multiple agents at one time, but be sure to press save to commit all your changes to the database.

Delete an Existing Agent

1. In the **Agents** menu option, click  beside the **Extension** of the agent whom you want to delete. A delete confirmation message box will appear.
2. Click **OK**
3. Click **Save changes** to save the changes you just made.

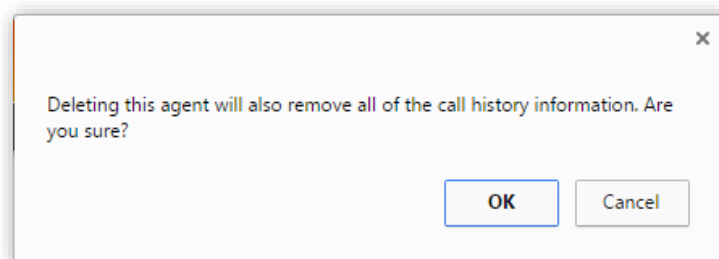
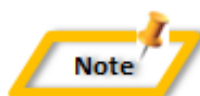


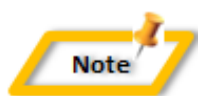
Figure 15: Delete Confirmation message box



Once you delete the agent, all the data related to the agent, including call logs will be deleted. If you have deleted the agent by mistake and want to get the agent back, it can be possible only if you have not saved the changes. To view the agent again, you need to click any menu on the menu bar and again click **Agents** menu option.

Activate Agent

1. In the **Agents** menu option, from the **Active** column, check the check box of the agent whom you want to activate.
2. Click **Save changes**.



To check if the agent is successfully activated, you can confirm by displaying the wallboard screen. The agent should display in the list of monitored agents.

Inactivate Agent

1. In the **Agents** menu option, from the **Active** column, uncheck the check box of the agent whom you want to inactivate.
2. Click **Save changes**.



To confirm the agent has been successfully inactivated, you can display the **Wallboard**. The inactivated agent should no longer display on the list of agents.

Edit Quota

You can edit the agent's quotas for the day and month:

1. Select the **Agents** menu option, and identify the record of the agent for whom you want to change the quota.
2. Click **Day Quota** or **Month Quota** depending on the quota that you want to edit.
3. In the text field, type the new quota.
4. Click **Save changes** to save the new quota.

Edit Picture

You can edit the agent's picture by selecting the image from the available list of pictures:

1. Chose **Agents from the** menu
2. In the **Picture** column click the drop down to view the list of available images.
3. Select the previously uploaded image you want to associate with the agent.
4. Click **Save changes** to save and view the picture for the agent.

Upload New Image

You can upload a new agent image and make it available in the **Picture** drop down list:

1. In the **Agents** menu option, on the top right corner, click **Browse**.
2. Browse to the image path.
3. Click **Save changes** to add the image to the picture drop down list.

Reports

1. The **Reports** menu option enables you to export data in various formats available.
2. Only the user with 'manager' role can view **Reports** screen.
3. The data represents call logs of all the agents for the day.
4. The call logs will be available till the end of the current month.
5. You can display call logs only for a specific day of the current month.
6. **Filter** link on the left hand corner of the screen uses built-in query builder that enables you to filter call records by designing complex queries.

Export Call Log

The **Reports** screen displays list of all the calls placed by the agents for the day. You can also view the list of call records for a specific day by selecting the desired date in **Call Start** and **Call End** dropdowns. The log contains details including 'Agent Name', 'Extension', 'Call Status', 'Call Duration' etc. As a manager, you can export the data in various formats including pdf, xls, xlsx, rtf or csv.

1. Select the **Reports** menu option to display the call log records. You can filter the data displayed or exported by entering criteria in the filter row.
2. Click appropriate export button to export the logs in your desired format.



Figure 16: Export formats



The call records will be displayed only for a specific date of the current month, after which they are automatically deleted. Once the end date (30th or 31st date) of the month is reached, all the call records in that month will be unavailable.

Settings

The **Settings** menu enables you to control font size, order of columns, column availability (making a column visible/ invisible) and setting minimum call duration in the **Wallboard** screen. The **Minimum call duration** enables you to set time in seconds after which a call that is made in the set **Work hours type** will stand eligible for call count. Only a user with the 'manager' role can view the **Settings** screen.

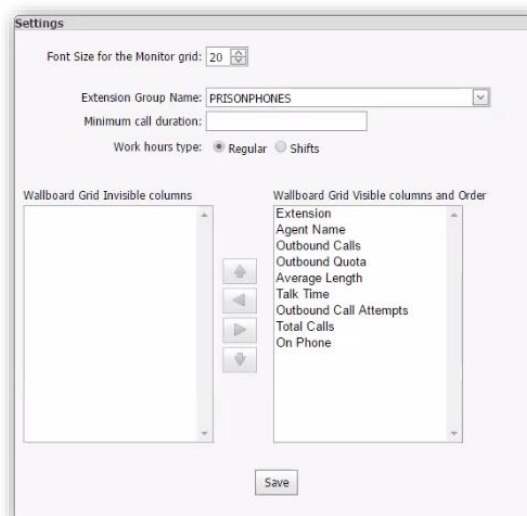


Figure 17: Wallboard Settings dialog

Edit Font Size

You can increase or decrease the font size for wallboard screen so that when you display the agent information on flat screen TVs in prominent locations, the font will be visible to everyone from a farther distance.

To adjust the wallboard font size:

1. On the **Settings** menu option and in the **Settings** dialog box, from the **Font Size for the Monitor grid** select box, increase or decrease the font size.
2. Click **Save** to save the font changes.

Edit Extension Group

- When you log into the web portal for the first time, you should save an extension group from the **Extension Group Name** dropdown. Once you save the extension group, the wallboard screen automatically displays the active agents of that group.
- Once an extension group is selected, only the manager of the selected 3CX extension group can view and access the complete web portal, while the agents of that group can only view **Wallboard** and **About** screens.
- When you select a specific **Extension Group Name** in the **Settings** screen, the **Extension** dropdown in the **Agents** screen lists all the extensions assigned to that group.

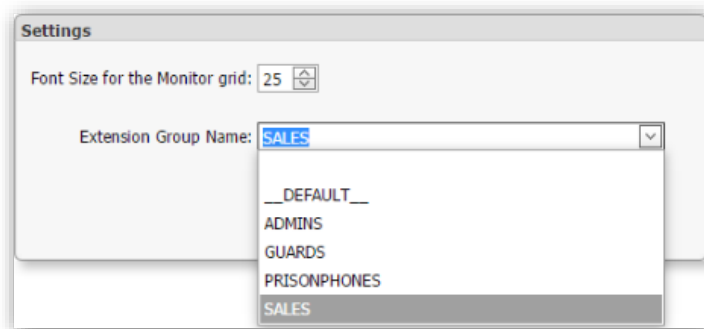


Figure 18: Edit Extension Group

Specify the 3CX extension group to monitor:

1. On the **Settings** dialog box, select the desired group from the **Extension Group Name** dropdown.
2. Click **Save** to save the selected extension group.

Set Minimum Call Duration

1. On the **Settings** dialog box, in the **Minimum call duration** field, enter the time (in seconds) so that the outbound call that exceeds the set time will be eligible for call count.
2. Click **Save**



Figure 19: Setting Minimum Call Duration as 15 seconds

Set Working Hours for an Extension

Calls that are made only during the set **Work hour type** will stand eligible for call count for any agent.

SET REGULAR SHIFT

1. On the **Settings** dialog box, beside **Work hours type** label, select **Regular** radio button.



Regular shift is day shift and the timings are 12:00 AM to 11:59 PM

SET SHIFT TIMINGS

1. Beside **Work hours type** label, select **Shifts** radio button.
2. In the **Shift start time** field, set the time from which the shift starts.
3. In the **Shift end time** field, set the time at which the shift ends.

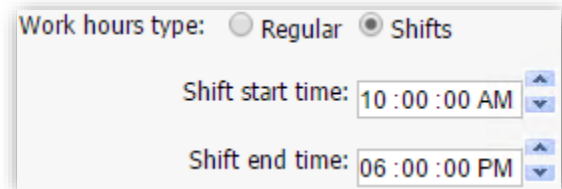





Figure 20: Work Hours Type - setting shift timings

Reorganize the columns order for wallboard screen


1. On the **Settings** dialog box, under **Wallboard Grid Visible columns and Order** list box, select the column that you want to reorganize in the wallboard screen and click  or  button to move the column to the left or right hand side respectively.

Make a column visible or invisible for Wallboard screen

MAKE A COLUMN INVISIBLE

1. On the **Settings** dialog box, under **Wallboard Grid Visible columns and Order** list box, select the column that you want to hide in the wallboard screen
2. Click  button to move it to the **Wallboard Grid Invisible columns** list box
3. Click **Save**

HIDE A COLUMN VISIBLE

1. On the **Settings** dialog, under **Wallboard Grid Invisible columns** box, select the column that you want to make visible in the wallboard screen
2. Click  button to move it to the **Wallboard Grid Visible columns and Order** list box
3. Click **Save**

Support

If you need support, would like to request an enhancement to 3CX Competitive Wallboard, or are interested in discussing a custom solution, you can contact us as at the following:

Address: 2306 Shimmering Bay Lane
Cincinnati, OH 45244-2760

Hours: Monday – Friday
8:00 A.M. – 6:00 P.M. Central Standard Time

Phone: USA: +1 801-642-4655

Skype: VoIPToys

Email: info@VoIPTools.com

Web: <http://www.VoIPTools.com>