



User Guide

3CX Post Call Surveyor

Version 14.0.7

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Introduction

Every organization strives to offer better service to its customers. 3CX Post Call Surveyor enables you to collect information that identifies how your customers feel about the services offered by your organization through phone surveys. This information will enable you to identify areas where your organization can improve, increase the quality of services that you provide, and measure the effectiveness of individual staff members.

What is 3CX Post Call Surveyor?

3CX Post Call Surveyor creates phone based automated surveys. Through a web based application you create Surveys and associate them with a specialized Digital Receptionist (IVR). To take a survey, the caller is transferred to a 3CX Digital Receptionist where a series of questions are asked and the caller's responses are saved in a SQL database.

Why 3CX Post Call Surveyor?

1. To survey callers regarding the quality of service provided by your organization.
2. To analyze the caller's responses and make informed decisions.

How to use 3CX Post Call Surveyor?

To create a survey, you need to log into the 3CX Post Call Surveyor web portal. There you can create questions, group questions into surveys, and associate a survey with a specific extension within 3CX. With Post Call Surveyor you can create an extensive library of surveys, and easily modify existing surveys to further refine the information you collect.

Prerequisites

Before installing 3CX Post Call Surveyor, you need to ensure that your computer meets the minimum requirements mentioned below:

1. 3CX Version 12 – 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 Post Call Surveyor 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 Post Call Surveyor. These prerequisites include Microsoft Internet Information Server (IIS) and Microsoft SQL Server.

3

Install 3CX Post Call Surveyor

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

4

Register your License Key

You must register your license key to activate 3CX Post Call Surveyor. 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 Post Call Surveyor

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 **3CXPostCallSurveyorInstaller.exe**.
2. Double-click the file to start the VoIPToys Setup Wizard.
3. Click **Next** to continue.



Figure 1: Setup Wizard

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

1. If you are installing 3CX Post Call Surveyor 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 Post Call Surveyor 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: **3CXPostCallSurveyorInstaller.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 Post Call Surveyor 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 Relay Settings

1. In the **Relay Services Host** field, enter “localhost” if installing 3CX Post Call Surveyor 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**
3. Click **Test Relay Settings** to confirm 3CX Post Call Surveyor can communicate with the Relay services running on the 3CX server.



Figure 2: Test Relay Settings

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

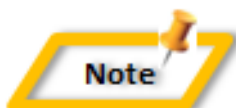
Step 6: Configure the database

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



Figure 3: Configure Database

2. In the **Connection Properties** dialog, 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 Post Call Surveyor is installed, you will need to configure SQL Server to allow remote connections.

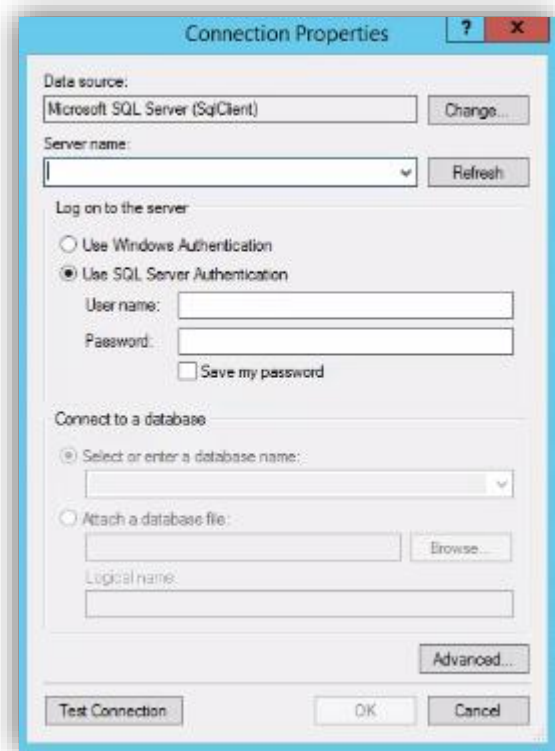


Figure 4: Connection Properties

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.
4. The first time you install 3CX Post Call Surveyor, **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 Post Call Surveyor from a previous version, select the existing database from the list.
5. Click **Test Connection** button
6. Click **OK** to close the test results dialog
7. Click **Next** to continue the installation



Figure 5: Run Application

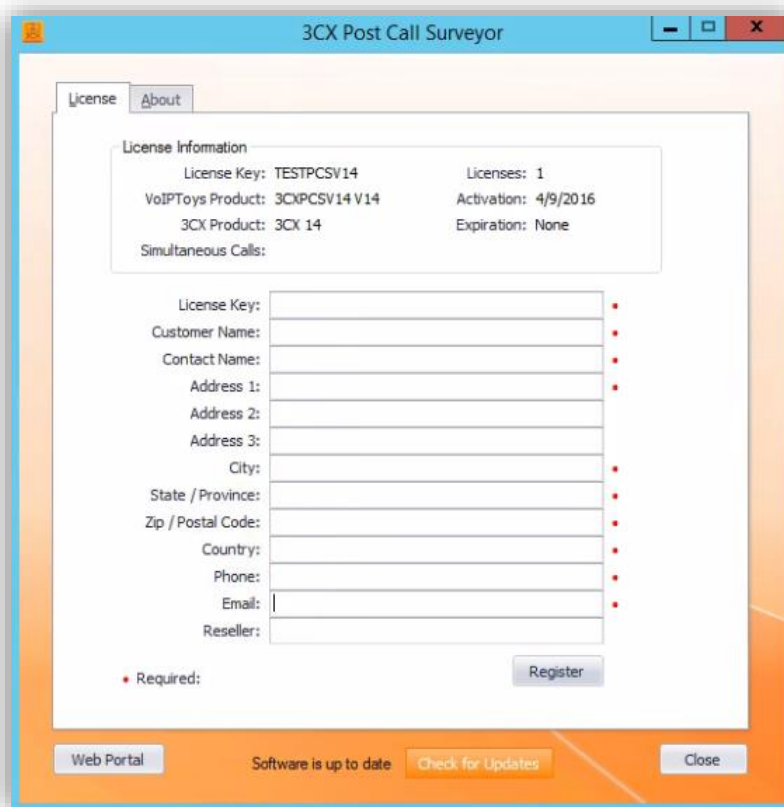
8. When the software installation is complete, click **Run Application**



Figure 6: Run Application

Step 7: Register

9. On the 3CX Post Call Surveyor configuration screen, enter your registration information in all the required fields (Note the red dot denotes a required field).
10. Click **Register**



The screenshot shows the 'License' tab of the 3CX Post Call Surveyor configuration window. The window title is '3CX Post Call Surveyor'. The 'License' tab is active, and the 'About' tab is also visible. The 'License Information' section displays the following details:

License Key: TESTPCSV14	Licenses: 1
VoIPToys Product: 3CXPCSV14 V14	Activation: 4/9/2016
3CX Product: 3CX 14	Expiration: None
Simultaneous Calls:	

Below the license information, there are several input fields, each with a red dot indicating it is a required field:

- License Key:
- Customer Name:
- Contact Name:
- Address 1:
- Address 2:
- Address 3:
- City:
- State / Province:
- Zip / Postal Code:
- Country:
- Phone:
- Email:
- Reseller:

A legend at the bottom left 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: Register

Step 8: Check for Updates

The **Check for Updates** button on the **License** tab enables you to easily download the latest version of 3CX Post Call Surveyor. If a newer version of 3CX Post Call Surveyor 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 Post Call Surveyor 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 Post Call Surveyor 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

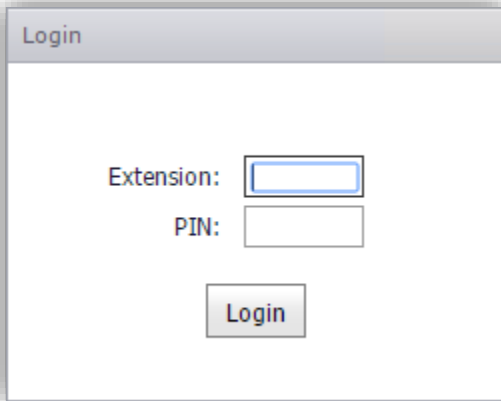

A screenshot of a web browser window titled "Login". The window contains a simple login form with two input fields. The first field is labeled "Extension:" and has a blue border. The second field is labeled "PIN:" and has a grey border. Below the input fields is a "Login" button with a grey border and the text "Login" in the center.

Figure 8: 3CX Post Call Surveyor Web Portal Login

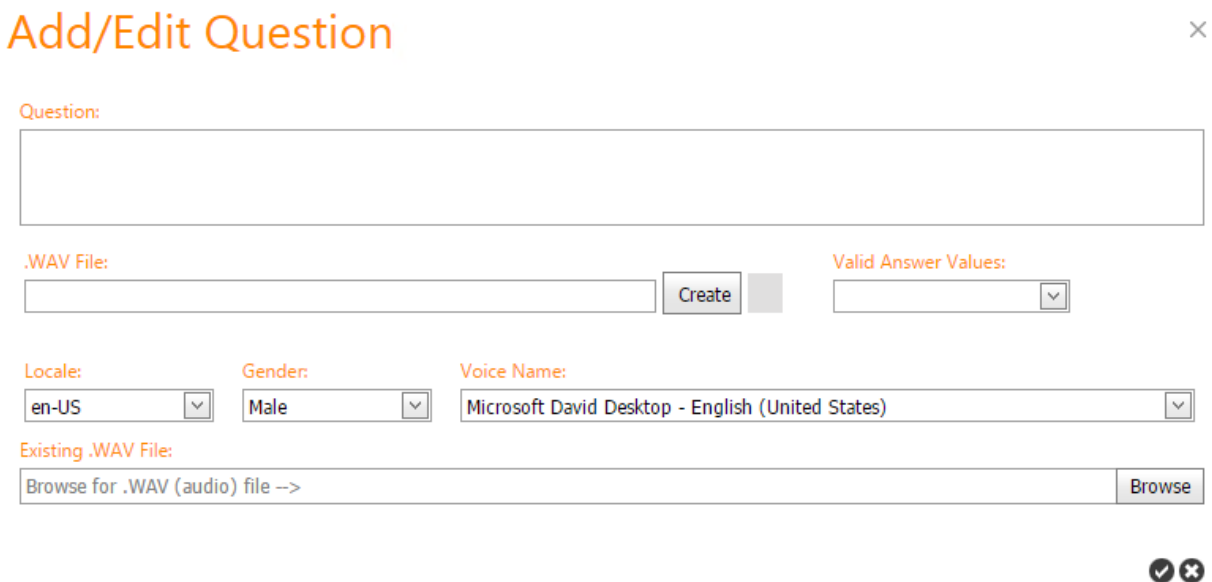
Add a Question

You can create the audio file for a question using Text-to-Speech, or upload a prerecorded .wav file.

1. On the menu bar, click **Questions**
2. In the **Question Maintenance** screen, click  to add a new question.

Text-To-Speech

- a. On the **Add/ Edit Question** dialog box, in the **Question** textbox, type the question
- b. Enter the **WAV File** name
- c. From the **Valid Answer Values** drop down, select the value that best answers the question
- d. Select proper values from **Locale**, **Gender** and **Voice Name** drop downs
- e. Click **Create** to generate the .wav file



Question:


.WAV File: Valid Answer Values:

Locale: Gender: Voice Name:



Existing .WAV File:

Figure 9: Add/ Edit Question



Prerecorded Audio File

- On the **Add/ Edit Question** dialog box, in the **Question** textbox, type the question
- Click the Browse button and select the file to upload
- Click  to save your changes

Edit a Question

- Click  beside the question that you want to edit
- Make the desired changes
- Click  to save your changes

Add a Survey

- On the menu click **Surveys**
- In the **Survey Maintenance** screen, click  to create a new survey
- In the **Add/ Edit Survey** dialog box, from the **Available** section, select the question that you want to include in the survey
- Click **Include**
- Enter **Survey Name** and **Description** details
- Click  to save the survey

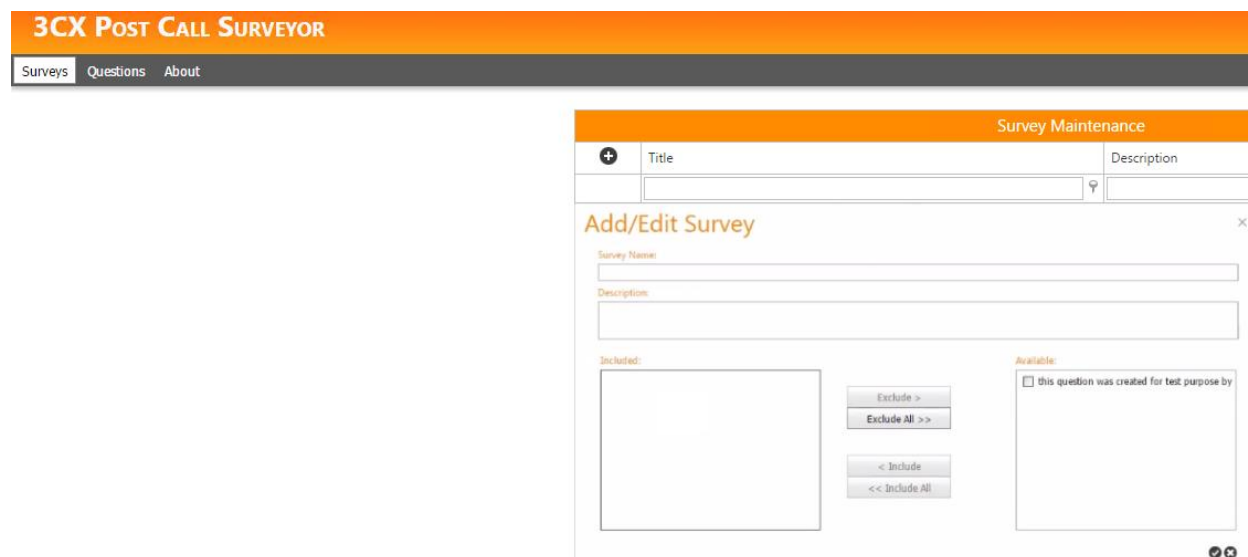



Figure 10: Add/ Edit Survey

Edit a Survey

1. On the menu select **Surveys**
2. From the **Included** section, select the questions that you want to exclude
3. Click **Exclude**
4. From the **Available** section, select the questions that you want to include
5. Click **Include**
6. Click  to save your changes

Testing a new Survey

- a. How do you assign a survey to a Digital Receptionist?
- b. How do you know what extension number to dial?
- c. Describe forwarding calls to the extension

Survey Results Report

- a. We don't have a Survey Report. We need one!
- b. We need the following report filters: Survey, optional start and end dates, optional agent that took the call.
- c. The user should be able to select a survey from a list and run a report that summarizes the caller's responses. It would be cool if we could display a pie chart showing percent of answers.

Support

If you need support, would like to request an enhancement to 3CX Post Call Surveyor, 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>