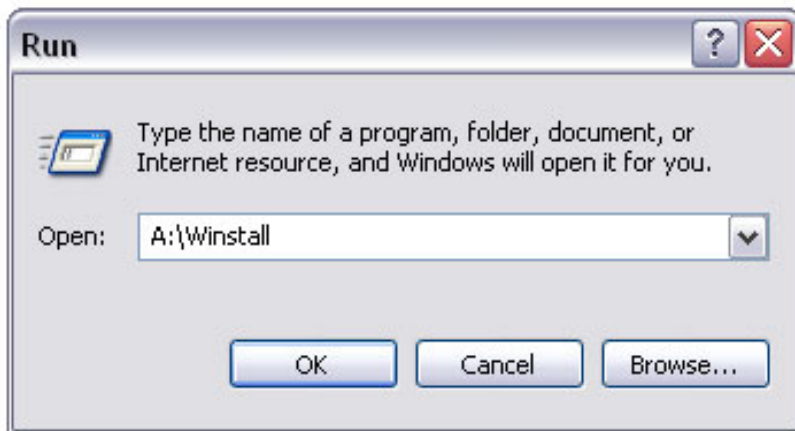


Genesis Quick Install Instructions

for Plus, Lite, & Ultra-Lite Versions

Step 1. Installing the software

Dos Version: From DOS type **A: <enter>** then **INSTALL <enter>**

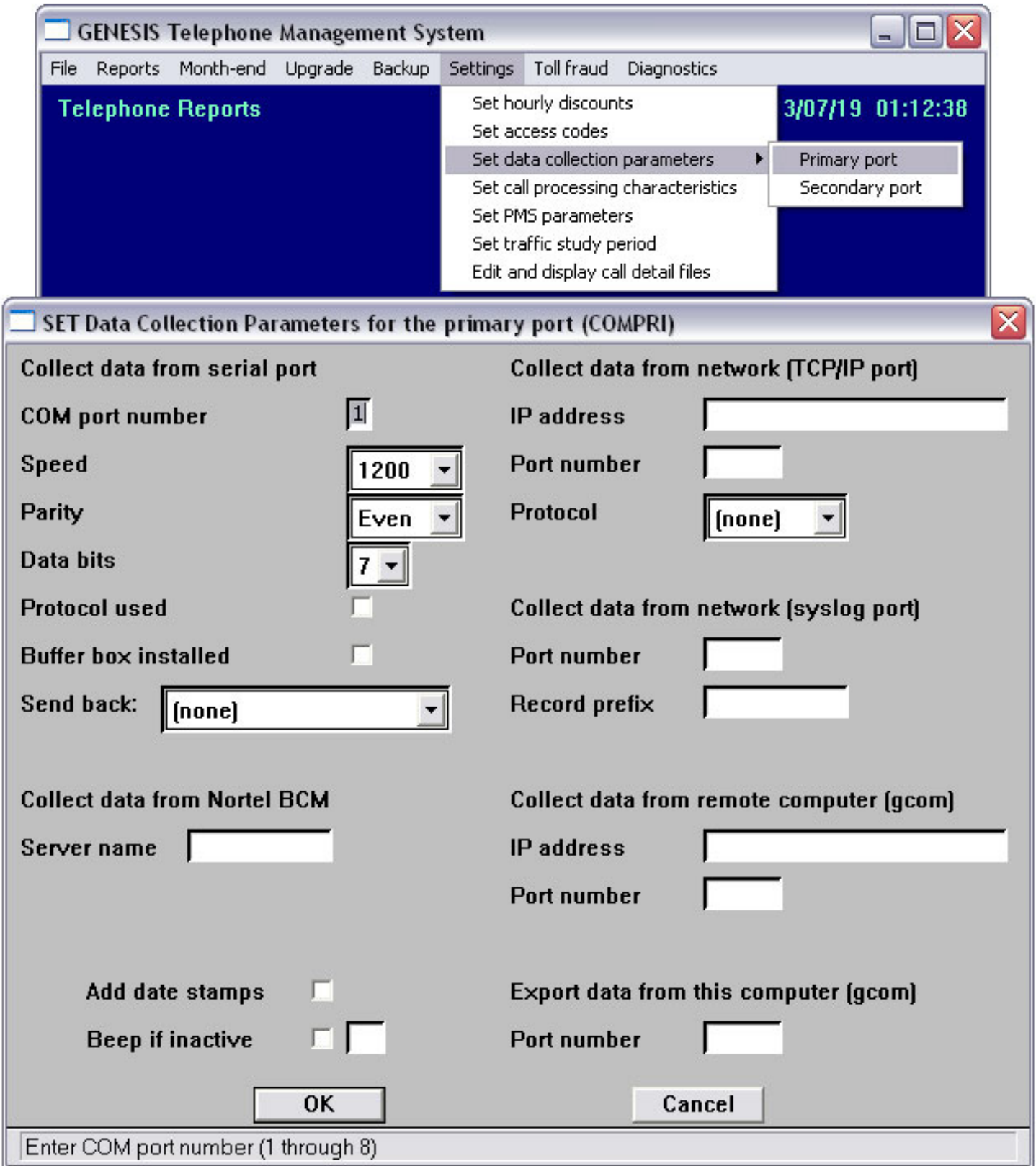


Windows Version: Click **Start » Run** and enter **A:\WINSTALL** (where A is the letter of your floppy drive)

Step 2. Complete the Genesis Installation

(Refer to the User's Manual for more detailed information)

Step 3. Set the Data Collection Parameters



Enter the Data Collection Settings, the COM port used on the PC and the speed, parity & data bits used by the telephone system. Ignore the rest of the screen unless installing the DOS version using COM3 or COM4, Buffer Box, HOBIC Merge Option, or Multi-Switchboard Option, then you must refer to the manual.

Common problems:

- Cabled incorrectly from switchboard so that switch will not send data; only Pins 3 & 7 required, otherwise you must strap any others at the switchboard end of the cable.
- Pins 2 and 3 need to be reversed
- Speed, parity, and data bits don't match switchboard CDR output
- Computer's serial port configured incorrectly or conflicts with an existing internal fax / modem (IRQ & Port Address Conflicts)
- Computer's serial port is defective.
- Switchboard is not programmed to send call data.
- *IP Address or specified port number is incorrect or does not match switch settings
- *The server name that was specified is incorrect
- *Machine is not properly configured on the network (unable to ping the switch, other clients, etc.)

* For IP configurations only.

Caution:

- Only enter Access Codes if they are attached directly to the front of the dialed telephone number (no spaces), otherwise call costing errors will occur. You can see the Access Codes on data collection screen.
- Failure to enter them with an SL-1 or Meridian 1 switchboard will result in call costing errors.
- Leave the feature prefixes *67, *68, *69, but add any other special telephone company dialing services.

Step 5. Set Surcharges and Taxes

GENESIS Telephone Management System

File Reports Month-end Upgrade Backup Settings Toll fraud Diagnostics

Update extension file
Update trunk file
Set surcharges and taxes

2003/07/19 17:31:20

SET Surcharges and Taxes

Table: 1

Maximum Surcharge and Markup Ceiling per call: \$

	Surchg	Surchg. 1	Surchg. 2	Markup	Tax 1	Tax 2	Tax 3
	\$/call	\$/min Min.	\$/min Min.	%	%	%	%
Basic cost	N/A	N/A	N/A	N/A	7.50	7.00	
Local call	0.25						
Incoming							
Long Dist.	1.00	0.25 10	15.00 0	30.00	7.50	7.00	
Operator	1.50				7.50	7.00	
Overseas	2.50	0.30 0			7.50	7.00	
411	0.95				7.50	7.00	
555-1212	0.95				7.50	7.00	
800							
900	50.00	99.00 0		100.00	7.50	7.00	

Apply tax on tax

Enter markup percentage (between 0.00% and 999.99%)

Select a Surcharge & Tax table (1 through 9). For Hotel/Motel sites use Table #1 for the guest rooms and Table #2 for the Administration phones. For general business sites you may only need to use Table #1 unless different Surcharge amounts are to be applied to various extensions, trunks, account codes or dialed numbers.

Hints:

- Basic Call Cost - is the telephone company charge for the call. You must add any taxes here.
- Local, Incoming, Long Distance, Overseas, 1800 + calls - can also be surcharged separately (over and above the telephone company's charge) by completing the appropriate column. Any Markup of the Basic Call Cost is applied first then any Surcharge per Call and/or Minute is applied. Taxes are applied to the surcharge amounts by completing the appropriate column.
- Directory Assistance calls - are charged what you enter here. You must also add any taxes here.
- 1900+ Calls - Rates for these calls can vary from \$1.00 to \$150.00 per minute depending on the number called. Use heavy surcharges or to restrict dialing these at the switchboard.

Step 6. Enter Extension Information

The screenshot shows the 'ADD a new extension' dialog box in the GENESIS Telephone Management System. The main window title is 'GENESIS Telephone Management System' and the menu bar includes 'File', 'Reports', 'Month-end', 'Upgrade', 'Backup', 'Settings', 'Toll fraud', and 'Diagnostics'. The status bar shows the date and time '2003/07/19 17:35:36'. The dialog box has a title bar 'ADD a new extension' and a close button. It contains the following fields and controls:

	no.	name	
Extension:	200	Smith, Larry	Extension type: Normal
Department	10	Operations	Surcharge table: 1
Division	1A	Administration	Equipment charge:
			Bill calls to: 200
			Auth. code:

Comments: [Empty text box]

Equipment codes:

Buttons: OK, Cancel

Footer: Enter extension name or description

(Plus & Lite series only) Enter your extension information. If you choose not to, calls will still be collected and billed to the correct extension but it will be allocated to the unassigned division and department. Department numbers should not be the same as extension numbers.

- **General business** - when you want charges allocated to various departments, etc. within your organization enter your extension information. Refer to the manual if you want to change the number or names of the hierarchy levels from Department or Division. If you have hundreds of names to add it is important to note that each night calls will be re-allocated to any new extensions you added that day.

- **Hotel/Motel** - you can just enter the administration phones and point them to Surcharge Table #2. (that you created which only has taxes applied). Hotel versions default to treating every extension number as a guest phone unless you identify them differently in this file. Over-ride this by changing the extension type to a "blank".

Step 7. Enter Trunk Information

The screenshot shows the GENESIS Telephone Management System interface. The main window has a menu bar with 'File', 'Reports', 'Month-end', 'Upgrade', 'Backup', 'Settings', 'Toll fraud', and 'Diagnostics'. Below the menu bar, there are two buttons: 'Update extension file' and 'Update trunk file'. The system clock shows '2003/07/19 17:38:46'. A dialog box titled 'CHANGE an existing trunk' is open, showing the following fields and options:

Field	Value
Trunk member number from	T001
to	increment:
Trunk type	C2WAY
Call timers table number	1
Surcharges table number	1
Fixed rate per minute	0.000
Minimum billing seconds	0
Increment billing seconds	0
Monthly line rental	0.00
Apply monthly rental to	
calls at month end	<input type="checkbox"/>
Rate table name	
Special discount file name	
Special discount plans	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Apply city names	<input checked="" type="checkbox"/>

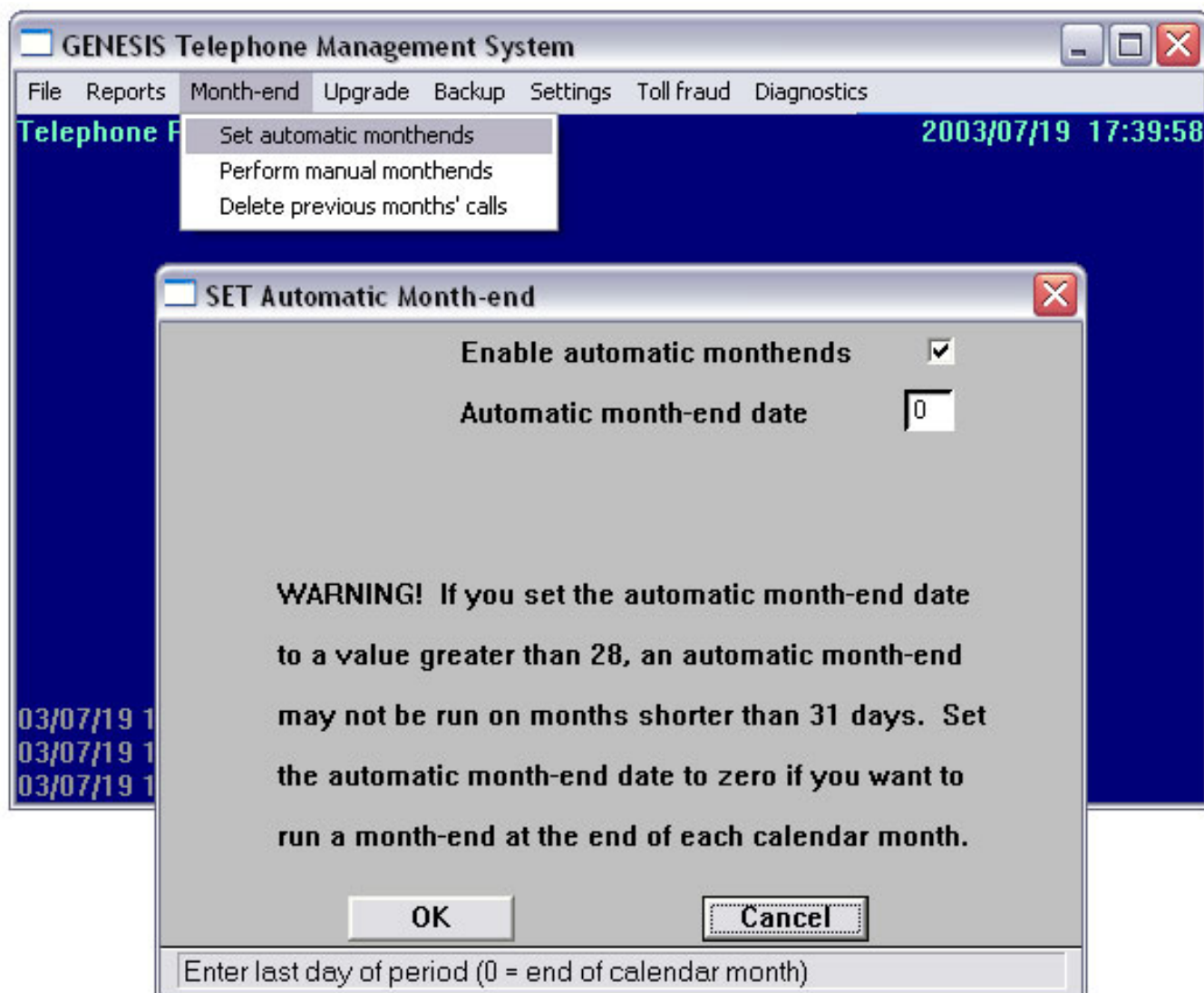
Buttons: OK, Cancel

Enter C (CO), F (FX), W (WATS), T (Tie), or M (misc.) followed by sub-type

(Plus Series only) Enter your trunk information if you plan to use the system's powerful Traffic Reports. Use the Trunk Type field to define your different types of trunks (COUT, CIN, CDID, C2WAY, TIE, FX, WATS, MISC, etc). If you choose not to, the system will add them to your file automatically, but they will all be assigned to the C2WAY category (Central Office two-way trunks).

- All "C" (Central Office) trunk types are costed using your telephone company's rates, however you must enter a rate per minute for type trunks (like TIE, FX, WATS, & MISC) otherwise they will NOT be costed. Read the User's Manual for more information on non "C" trunk types.
- If you are uncertain about your number and types of trunks you can let the system add them automatically and adjust them later.

Step 8. Set Automatic Month-ends



Select and enter a date for the system to perform Automatic Month-ends. On that date each month your current call collection files will be closed and new ones opened.

Hints:

- You can print reports for any previous period by simply selecting it during the report printing process.
- The system never deletes call record files, so you should occasionally archive them onto disk or tape and delete them from your hard disk to avoid running out of disk space.

Step 9. Configure Automatic Startup

You can configure your system to automatically start the Genesis billing program each time the system boots. Normally just the data collection portion of your system starts each time the computer is "booted" so that call collection from your telephone system can occur. This is a must for Hotel/Motel sites.

For DOS users:

Add the two lines below into the autoexec.bat file located in C:\ (where c: is the drive Genesis is installed on)

```
cd\cdr  
go
```

For Windows users:

Add the following line into the win.ini (**Start » Run » win.ini**)

```
Run = \CDR\WGO.EXE
```

Remember, this is only required if you want the Main Menu (with the billing program) to be up and running each time the system boots. Without this, calls will still be collected but costing will be delayed until you bring the Main Menu up or until midnight, whichever comes first. Hotel/Motel sites should add these lines to ensure the system is always ready to bill guest calls.