







Basic Installation Instructions: WIN-SENSE 32 Demo

This document will walk you through a demo installation for the Mitel SX200 PBX using the SMDR File Collect module. For a more complete list of instructions or for help installing the software for your specific location and PBX, visit TEL's product support page at <http://www.tel-electronics.com/call-accounting-techsupport.php>.

1. **Download** the WIN-SENSE 32 Demo from <http://www.tel-electronics.com/downloaddemo.php>. Unzip the folder using WinZip or similar program. The demo will process up to 200 calls before it stops working.
2. **Install** WIN-SENSE 32 on your computer. Open the unzipped folder and double-click on Setup. Go through the Install Wizard until the program is installed. Click Finish upon completion.
3. **Setup SMDR Data.** Go to Start > All Programs > WIN-Sense32 DEMO > Setup SMDR.
 - a. Setup your PBX settings. Go to File > Setup PBX. For demo purposes, select Mitel SX200 and click OK.
 - b. On the left side, click on the + sign next to *Collection Points*. This will allow you to setup your collection method. For demo purposes, we will choose File. Make sure the file is pointed to C:\Program Files\WINSense32_Demo\smdrfiles\MITEL1.FIL
4. **Setup Organization Lists.** Go to Start > All Programs > WIN-Sense32 DEMO > Setup Organization.
 - a. On the left side, click Billing Class. Setup markups and surcharges for different types of users.
 - b. Click Departments. Setup department names. Click Add to add new departments or import a department list by going to File > Import > Departments. Importable files need to be .csv or .txt files.
 - c. Click Extension. Manually add or import employee extensions. File > Import > Extensions.
 - d. Click Account. Accounts are used to track specific phone numbers or customers. Manually add or import lists.
 - e. To import your company logo, go to File > Company Logo.
5. **Run SMDR Collection Module.** Open the desired collection module. For this demo, Go to Start > All Programs > WIN-Sense32 DEMO > File Collect SMDR.
 - a. Click Read Now to start collecting. The status bar should say Enabled and be highlighted in green. If setup correctly, you should see calls being collected.
 - b. Right click and select Setup for additional options.
 - c. Click the X on the top right hand corner to minimize the module. The collection module must always be running for the WIN-SENSE to work.
6. **Run SMDR Process Module.** Go to Start > All Programs > WIN-Sense32 DEMO > Process SMDR.
 - a. Select the Collection module(s) you will be using and deselect the rest (for the demo, select File).
 - b. If you see SMDR data strings processing, the WIN-SENSE is setup correctly.
 - c. Right click for more options and to setup Alarms.
 - d. Click on the X and minimize the module. The SMDR Process module must always be running.
7. **Setup Email and Scheduler.** This step is only required if you want to have reports manually or automatically emailed to you (you can skip this step for the purposes of the demo). To setup the Email (RBE), go to Start > All Programs > WIN-Sense32 DEMO > Email (RBE).
 - a. Make sure you see a green light that reads ACTIVE. If it's not active, click on the button to activate it.
 - b. Click the Servers button. Setup up the SMTP/POP email settings (same as Outlook settings).
 - c. Open the Scheduler module. Go to Start > All Programs > WIN-Sense32 DEMO > Scheduler. Nothing needs to be done here, but it needs to be running in order to schedule reports.
 - d. Click on the X in the corner and minimize the two modules. The Email (RBE) and Schedule modules must always be running to automatically schedule and email reports.
8. **Double Check.** Make sure that the following three icons are located in your task bar:   and that your desired collection module is located there as well. IP:  Serial:  File: . These need to be running for full functionality.
9. **Run Reports.** Once the SMDR and Organization have been setup correctly, you are ready to run reports. Go to Start > All Programs > WIN-Sense32 DEMO > Reports.
 - a. Select a report from the home screen or by using the menu at the top.
 - b. In the Call Date dropdown menu, select All Calls. This will allow you to see demo call data. Enter any other desired parameters and click OK to run the report.
 - c. Click on the  button to view PDF reports or to change the report viewing method.
 - d. For an explanation on how to setup and use reports, view the WIN-SENSE 32 [Video Presentation](#).
 - e. For ideas on how to use reports to save money, view the ["Cutting Telecom Expenses"](#) presentation.
10. **For additional questions**, refer to the [WIN-SENSE 32 v3.0 Manual](#).
11. **To purchase the software**, call 800-748-5022 or send an electronic request by visiting www.tel-electronics.com. Settings from your demo version can be copied over to the full version.