



# CallStash for On-Premise and Virtual PBX.

User Manual

V2 – 20.04.2022



<b>1</b>	<b>SCOPE</b>	<b>3</b>
<b>2</b>	<b>OVERVIEW</b>	<b>3</b>
<b>3</b>	<b>USING CALLSTASH</b>	<b>3</b>
3.1	Log in to CallStash	3
3.2	CallStash Search Console	4
3.2.1	Search Results	5
3.2.2	Tagging calls	5
3.2.3	Searching for calls	6
3.2.4	Saving frequent searches	7
3.2.5	Email call recordings to colleagues	8
3.2.6	Bulk download call recordings	8
3.3	CallStash for PBX Administrators	9

## 1 Scope

This document provides an overview of the interface presented to end users of the CallStash call archiving product. This document does not cover system administration or installation.

## 2 Overview

CallStash provides end user access to archived call recordings. Users can:

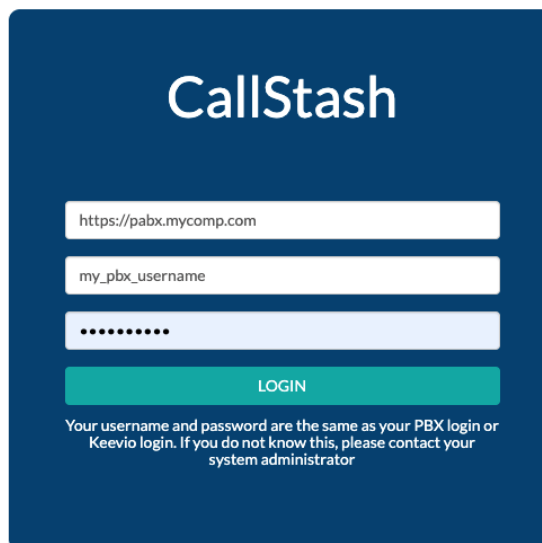
- Search recordings
- Tag recordings for future reference
- Listen to call recordings
- Hide calls that are not of interest
- Download call recordings
- Email time-limited links to call recordings

## 3 Using CallStash

CallStash is delivered as a web application. Please contact your local system administrator to obtain the correct URL for your organisation and then open that in a modern web browser such as Chrome.

### 3.1 Log in to CallStash

Accessing the web interface presents the user with a login screen. To login enter the URL to your PBX in the first field and then enter your **PABX user name and password**. Figure 1 shows a typical login.

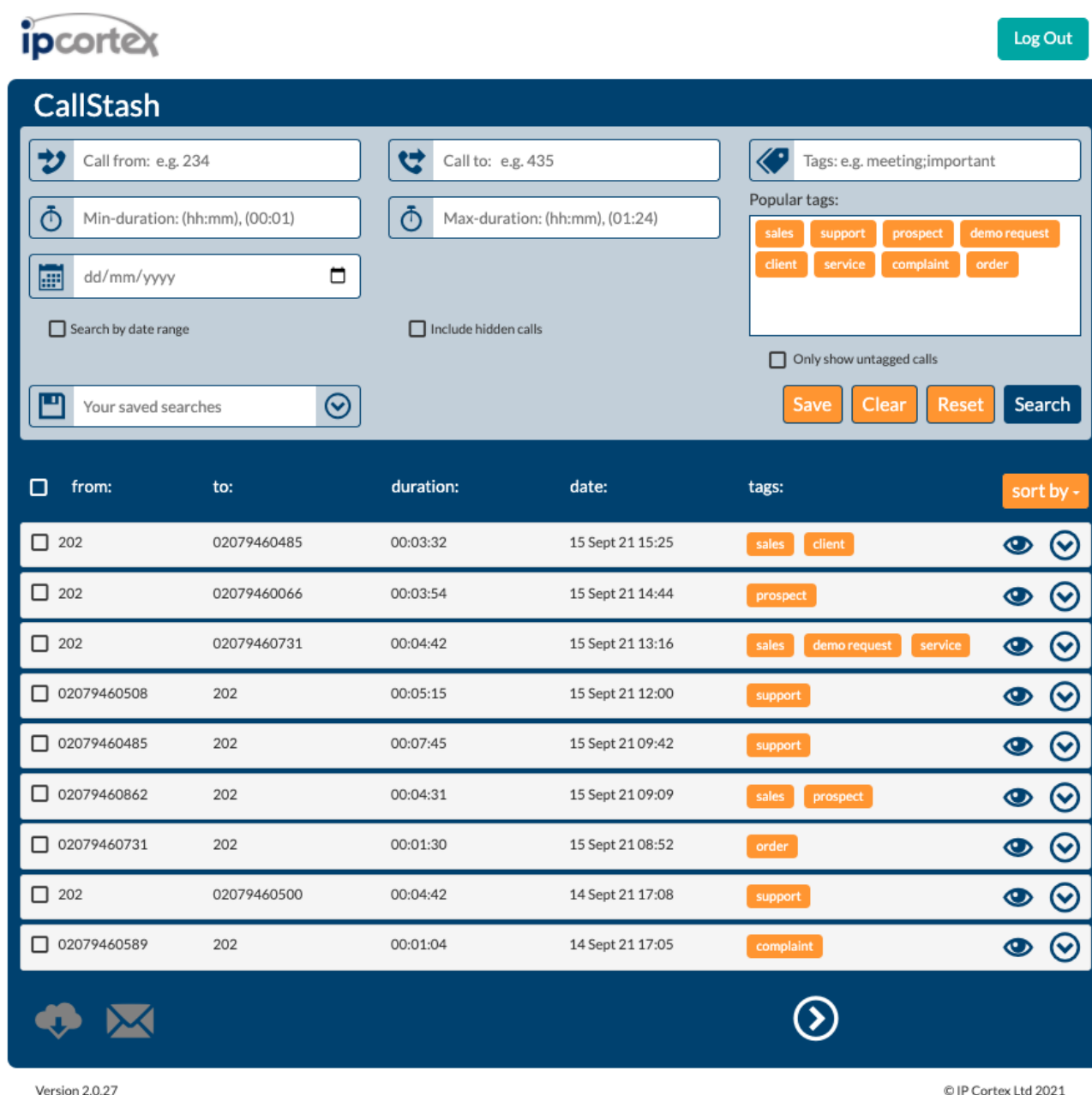


The image shows a login screen for CallStash. It has a dark blue background. At the top, the word "CallStash" is written in white. Below it, there are three input fields: the first contains the URL "https://pabx.mycomp.com", the second contains the username "my\_pbx\_username", and the third contains a masked password "\*\*\*\*\*". Below these fields is a green button labeled "LOGIN". At the bottom, there is a line of small white text that reads: "Your username and password are the same as your PBX login or Keevio login. If you do not know this, please contact your system administrator".

Figure 1 User Login

## 3.2 CallStash Search Console

Once you successfully logged in, you'll be presented with the search console shown in Figure 2. **Note: If you are an administrator on the PBX you will see a slightly modified console, please refer to §3.2.2.**



CallStash

Log Out

Call from: e.g. 234

Call to: e.g. 435

Tags: e.g. meeting;important

Min-duration: (hh:mm), (00:01)

Max-duration: (hh:mm), (01:24)

dd/mm/yyyy

☐ Search by date range

☐ Include hidden calls

Your saved searches

Popular tags:

sales support prospect demo request

client service complaint order

☐ Only show untagged calls

Save Clear Reset Search

<input type="checkbox"/>	from:	to:	duration:	date:	tags:	sort by -
<input type="checkbox"/>	202	02079460485	00:03:32	15 Sept 21 15:25	sales client	
<input type="checkbox"/>	202	02079460066	00:03:54	15 Sept 21 14:44	prospect	
<input type="checkbox"/>	202	02079460731	00:04:42	15 Sept 21 13:16	sales demo request service	
<input type="checkbox"/>	02079460508	202	00:05:15	15 Sept 21 12:00	support	
<input type="checkbox"/>	02079460485	202	00:07:45	15 Sept 21 09:42	support	
<input type="checkbox"/>	02079460862	202	00:04:31	15 Sept 21 09:09	sales prospect	
<input type="checkbox"/>	02079460731	202	00:01:30	15 Sept 21 08:52	order	
<input type="checkbox"/>	202	02079460500	00:04:42	14 Sept 21 17:08	support	
<input type="checkbox"/>	02079460589	202	00:01:04	14 Sept 21 17:05	complaint	

Version 2.0.27

© IP Cortex Ltd 2021

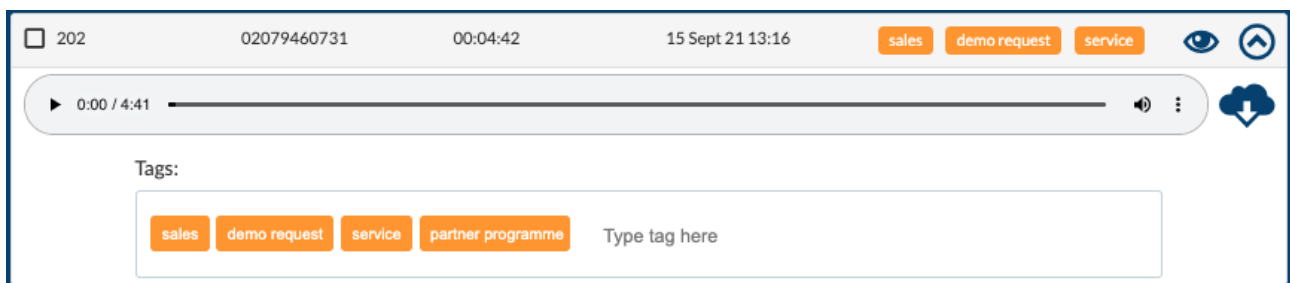
Figure 2 CallStash search console

The upper portion of the display comprises a set of search tools allowing you to filter which calls appear in the search results portion of the display below.

Initially the results are unfiltered and will include all calls for which you are identified as the caller or the recipient. A maximum of twenty recordings will be shown per page with next and previous page icons at the bottom of the page.

### 3.2.1 Search Results

The lower section of the display shows calls that match your search criteria. The caller, recipient, call duration, date/time and 'tags' for each call are shown along with a 'down arrow' to expand details of that call and allow the call to be played. To the very left of each call record is a checkbox that allows you to select calls for bulk download [§3.2.6] or to email to colleagues [§3.2.5]. An expanded call is shown in Figure 3.



*Figure 3 Expanded call details*

Key elements of the expanded call recording:



Calls may be hidden from your search results if they are unimportant to you. The call is not deleted but will not appear in search results unless you check the 'include hidden calls' box.



Download a copy of the recording to your local computer



An audio player allowing you to listen to the call recording



the set of tags you have applied to your recording. The unexpanded call summary only shows the first three tags.

### 3.2.2 Tagging calls

CallStash archives calls for extended periods of time. Call tagging allows you to effectively filter calls to those of a specific subject which can significantly help when trying to locate a call. Each call can have multiple tags attached:

- Use a small, concise set of tags applicable to your role in your organisation and the kinds of calls in which you participate.
- Be consistent in your use of those tags.
- Get into the habit of tagging calls on a regular basis, for example at the end of each day.
- 'noise' calls, for example in-bound sales calls that do not interest you, can be left un-tagged or hidden completely from the results using the *hide call* icon .



### 3.2.3 Searching for calls

The top section of the console gives you a set of controls allowing you to filter the calls that appear in the search results [§3.2.1]. The default display will show all your calls with the most recent at the top of the list.

Enter values into the search fields and **then press the search button** to refresh the display.

The search criteria are:



Enter the number of the party that initiated the call. By default, the value you enter will be treated as the first part of the number. If you enter '020' then all calls with that prefix will match, so '0203172852' and '02053423545' would match but '0214452235' and '402045443' would not.



You may also include '\*' to indicate a wildcard match. For example, entering '\*485' would match all numbers containing '485' (note that numbers entered always have an implied wildcard '\*' at the end and so '\*485' will match '0201114857')

Enter the number of the recipient of the call. The rules for the number are the same as for the caller described above.

The length (duration) of the call. You can enter a minimum and a maximum length for calls. This can be useful to filter out all very short calls if you know that the recording you want, for example, was longer than 5 minutes.



The format for durations is *hours:minutes*, each as one or two digits. If you enter a single number, then it is interpreted to mean a number of minutes.

Examples:

'5' - five minutes  
'1:0' - one hour  
'60' - also one hour  
'0:15' - fifteen minutes



The calendar fields allow you to specify either a specific date or a date range. By default there is a single date field that you can either manually complete or for which you can use the date picker. This allows you to search all calls on a specific date.

If you know approximately when a call was made you can narrow your search to a date range by checking the 'Search by date range' box. This will display a second calendar entry field allowing you to specify the end of your range.

Section 3.2.2 discussed the importance of tags and if you have consistently tagged your calls then in this field enter tags to restrict your search to specific categories of call.



You can type multiple tags by separating each with a comma ',' or a semicolon ';'.

When multiple tags are entered the search will select calls that match *at least one* of the tags.

The 'popular tags' box contains the most used tags within *your organisation*. You can click on these tags and have them automatically added to the 'tags' search field.

Ideally you will frequently tag your calls. It can be useful to review calls that have not been tagged. Checking the 'Only show untagged calls' box will allow you to do this.

By default, the search results will only include calls that have not been hidden [§3.2.1]. If the call you are interested may have been hidden, possibly accidentally, then check the 'Include hidden calls' box to widen your search.

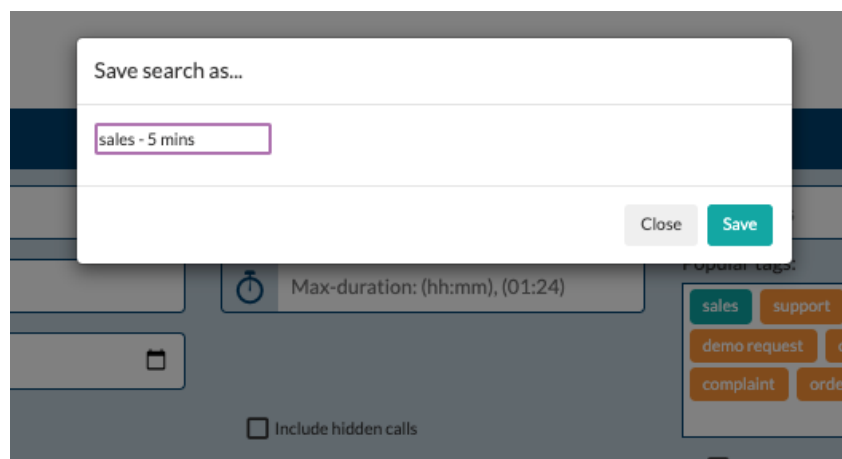
Once you have entered values into the search fields **remember to click the 'search' button to update the search results.**

### 3.2.4 Saving frequent searches

You may find that some searches are particularly useful for your role. For example, you may want to regularly review all your 'sales' calls that lasted for more than five minutes. To make this easier CallStash provides you with the means of saving searches.

To save a useful set of search parameters:

- Enter the search criteria in the fields provided and press the 'search' button.
- Make sure the search is returning the results you expect.
- Click the 'Save' button to bring up a the save dialog, shown in Figure 4.



*Figure 4 Saving a search*

If you want to modify one of your saved searches then change your search parameters, click 'save' and enter the name of the saved search you want to replace.

All of your saved searches will appear in the "Your saved searches" drop down box. To use a search select it from this box and the parameters will be copied to the search fields.

### 3.2.5 Email call recordings to colleagues

There are times when it's useful as part of your role to be able to email a link to a recording to a colleague. Normally only participants and administrators can listen to call recordings.

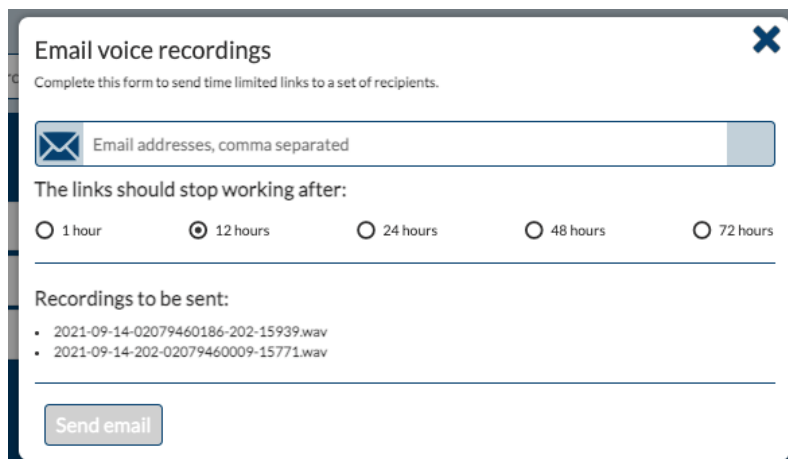
**Note: this feature may have been disabled by your system administrators.**

Because calls can contain sensitive information CallStash emails links to recipients that are 'time limited'. That is, the link will only work for a specific period of time after which it will generate an error.



Search for the recording(s) you wish to send and then in the results section check the box to the left of the summary. Once you've selected the recordings the email icon at the bottom of the page will be enabled and you can click this to bring up the email dialog

shown in Figure 5.



*Figure 5 Email voice recordings*

The default setting is for links to expire in 12 hours; however you can shorten or extend this to a maximum of 72 hours.

Enter the recipient's email address(es) in the field provided. If more than one recipient, separate each with a comma ','.

When ready press 'Send email'.

### 3.2.6 Bulk download call recordings

Individual recordings can be downloaded using the 'download' icon to the right of each recording summary as described in section 3.2.1.

It can be convenient to download more than one recording at a time. Search for the recordings you want and then select those you wish to download using the checkbox to the left of each summary.





Once you've selected the recordings the 'download' icon at the bottom of the page will be enabled. Click this and each recording will be downloaded in turn to your computer. Note that each recording is downloaded as a separate file.

### 3.3 CallStash for PBX Administrators

If you have company administrator permissions on the PBX then you will have a modified search console:

- You will see and be able to search call recordings stored for any PBX user
- You will not be able to 'hide' calls
- If your PBX is multi-company and you are an administrator for multiple companies, then you will have a drop-down box to select the company you wish to search