Q5000 - CDR Reporter

Quick Start Guide

Version 2.8.3

IntelliVoss

Q5000 - CDR Reporter

Quick Start Guide

Version 2.7.5

Get Started in 5 Minutes

CDR Reporter helps you analyze phone system call records to track costs, manage budgets, and generate professional reports. This guide will get you up and running quickly.

1. Install the Application

• Double-click **`CDRReporter-Setup.msi`**

• Follow the installation wizard

• Launch from desktop shortcut or Start Menu

System Requirements: Windows 10/11 (64-bit), 4GB RAM

2. First Run Setup Wizard

On first launch, the **Setup Wizard** guides you through 4 configuration paths. If you enter a license key when the app first starts, activation flows straight into this wizard - no restart needed (v2.7.1+).

Option A: Connect to Your PBX (Real System)

1. **SSH Connection:** Enter your PBX server IP, port, username, password

2. **CDR Database:** Enter MySQL database host, port, database name, credentials. Don't know the database password? Click **"Create read-only user automatically"** and CDR Reporter will create a dedicated read-only user for you over SSH (no MySQL root password needed). See the Administrator Guide, section 4.2.

3. **Test Connections** to verify

4. Dashboard loads with your live CDR data

Option B: Try Demo Mode (No PBX Needed)

1. **Create Demo:** Load about 900 sample calls across 4 months, 7 departments, 12 staff, 2 call policies

2. **Explore:** Get familiar with features without a real PBX

3. **Clear Demo:** Reset data when done (Settings -> Clear Demo Data button)

Option C: Import CSV Data (Bulk Data)

1. **Upload CSV:** Import CDR records from spreadsheet

2. **Map Columns:** Match your CSV columns to CDR fields

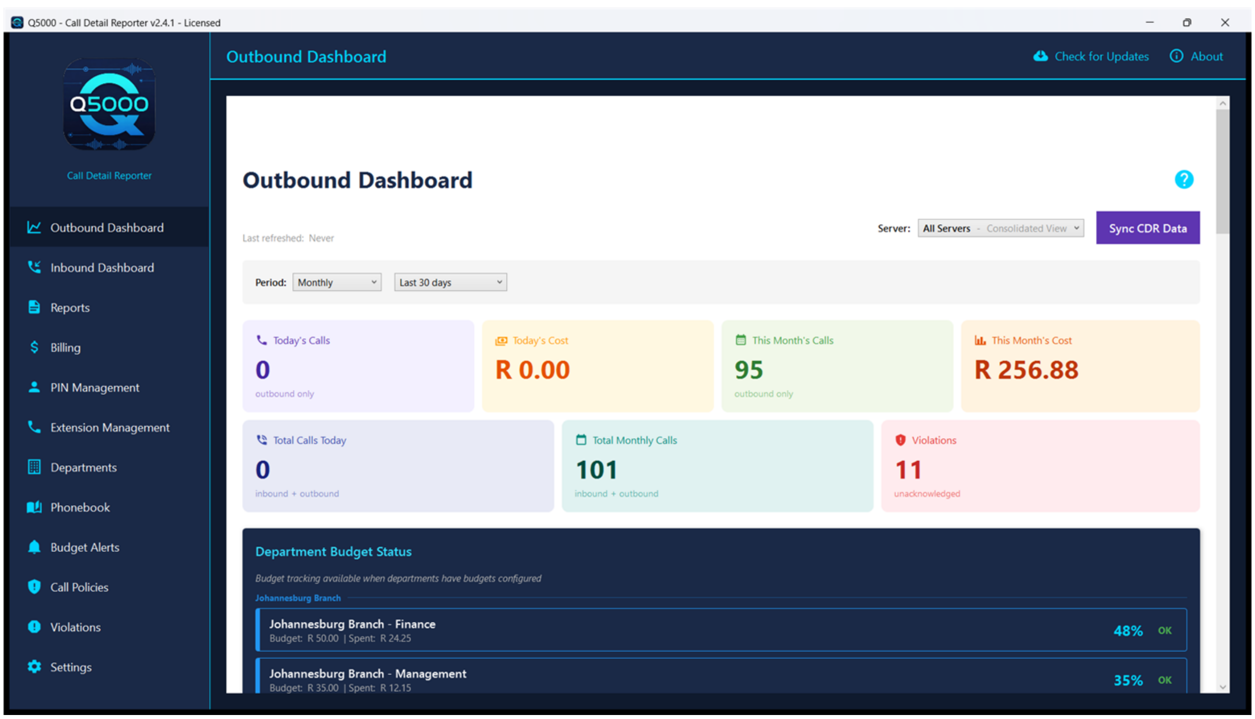
3. **Verify:** Review data before import

Option D: Restore from Backup

1. **Select Backup:** Choose a previous backup file

2. **Restore:** Recover your previous configuration and data

3. **Verify:** Ensure all settings restored correctly



The Outbound Dashboard after setup - summary tiles, budget status and call analytics

Quick Tips

Automatic Sync

Turn on **Automatic CDR Sync** in Settings and Q5000 downloads new call records every few minutes in the background, whichever screen you are on. Changes to the sync settings take effect within a minute - no restart needed (v2.7.2+).

AI Phone Lookup

Click the **brain icon** next to any unknown phone number to identify it (requires Gemini AI). Bulk lookup available in Phonebook ("Look Up All Unknown").

AI Pattern Detection

In the **Personal vs Business** report, click **"Detect & Save Personal Numbers"** to automatically find unclassified SA mobile numbers called in suspicious patterns and save them to your phonebook.

Call Identifier Mode

CDR Reporter **auto-detects** whether your PBX uses PINs, extensions, or both after each sync. View and override in **Settings -> Call Identifier Mode**.

Demo Mode

Try the app without a real PBX! Setup Wizard offers "Create Demo" with sample data.

Department Hierarchy

Departments can now be nested to **unlimited depth** with parent/child relationships. Create organizational hierarchies that match your company structure, and reports automatically roll up spending from child departments.

SSH Connection Error?

If the app starts with an **amber warning banner**, it means the PBX is unreachable. Go to **Settings -> PBX Servers** to check your connection details.

PIN Management

Map account codes to users and departments for better tracking. You can assign imported PINs to a **specific server** or "All Servers" using the Server Assignment dialog.

Departments

Set up departments with budgets to monitor spending and track hierarchies. Use **Review Budgets** to size those budgets from what each department actually spends.

Phonebook

Import contacts to automatically classify business vs personal calls with color coding

Budget Alerts

Configure alerts to be notified when departments exceed thresholds (80%, 90%, 100%)

Cost Analysis

Review call costs and identify expensive destinations with detailed breakdowns

Call Policies

Define policies to track compliance and policy violations across your organization

Inbound Dashboard

Inbound Dashboard is now a top-level sidebar entry (second from the top, directly below Outbound Dashboard). Dedicated reporting for inbound calls, missed calls, caller analysis, service level and abandonment metrics, plus a weekly-cached AI Insights summary card.

Billing Module

Generate billing runs with rate cards and export per-department/user billing reports

What's New in v2.8.2

Review Budgets covers every department shape

A department that has both its own extensions and sub-departments used to be invisible to the scan. Now an unbudgeted parent with its own spend gets one right-sized budget covering its whole branch, and a parent whose spend can never be covered (because a sub-department already owns the budget) is shown as an advisory row explaining what to restructure.

Four months of demo data

Demo Mode now seeds about 900 calls across 4 months, so Review Budgets and the comparative reports demonstrate at full strength straight from the wizard.

Accuracy and polish

Per-user report tables now agree with report headers on sites whose extensions are full-length numbers; a newly uploaded rate file is used immediately (no restart needed); and informational messages no longer appear under a green "Success" banner.

What's New in v2.8.0

Review Budgets

A budget nobody ever approaches never warns you, and one that is breached every month becomes noise. **Departments -> Review Budgets** compares each department's budget with what it actually spent over the last three complete months and proposes a right-sized figure - leaving room for the busiest month, so a normal month doesn't set off an alert. Tick the ones to apply, edit any amount you disagree with. The Outbound Dashboard raises a reminder every three months so budgets don't quietly drift out of date.

What's New in v2.7.x

Smoother First Run & Licensing

Activating a license flows straight into the Setup Wizard - no restart needed. Settings -> License has a new **Validate Now** button, and a license past its offline grace period re-validates itself automatically instead of asking for your key again.

Background Auto-Sync

Automatic CDR Sync now runs on its schedule whichever screen you are on, and saved changes to the sync settings apply within a minute - no restart needed.

Consistent Numbers Everywhere

All reports, both dashboards, and budget alerts now count calls the same way, so the numbers agree across screens. Very large report date ranges now warn you when they exceed the 500,000-call analysis limit instead of quietly leaving out the oldest calls.

Stronger Backups

Manual backups now require a password of at least 12 characters, and the entire backup file is encrypted. Automatic backups stay passwordless - they are protected automatically. Backups made with older versions still restore normally.

Billing Accuracy

Each phone call is billed exactly once - even on PIN-dialling systems - and internal extension-to-extension calls are never billed. Phonebook numbers match in both national (0...) and international (27...) forms, and QuickBooks accounting export lines always balance.

Safer Updates

Application updates are only accepted from the official q5000.co.za server.

What's New in v2.4.0

Dashboard Period Selector

Both dashboards now have a **Period** selector: Monthly (month dropdown incl. "Last 30 days"), Weekly (snaps to Monday-Sunday), Daily, or a Custom range. The Inbound Dashboard's hourly charts show per-day averages for multi-day periods.

Scheduled Reports & Scheduled Billing

Any saved report template can now be emailed automatically on a Daily/Weekly/Monthly schedule (Reports -> Schedule...), and monthly billing runs can be generated and emailed by scheduled jobs (Billing -> Scheduled Jobs). Both require an activated license for email delivery.

PIN Privacy

Raw PIN codes are never displayed anywhere - grids and reports show the mapped user's name, and unmapped PINs appear masked (e.g. "PIN ..23"). Click a masked PIN on the dashboard to name it.

Two New Reports

Top Dialed Numbers (most-called outbound destinations) and **Longest Duration Calls**, both reachable via quick-open buttons on the Outbound Dashboard's Top Reports card.

Suggest Departments (PIN + Extension Management)

A free name cross-match suggests department assignments from user names before any AI is involved; AI destination-pattern analysis is offered afterwards for active unmapped extensions.

Earlier Highlights (v2.1.x)

AI Insights (on both dashboards)

Weekly-cached AI summary card appears on the Outbound Dashboard and the Inbound Dashboard. Three actionable bullet points: top spending department, abnormal callers, recovery suggestions. Manual Refresh button if you want a fresh read sooner.

AI Budget Forecast (Outbound Dashboard)

A daily-cached card projects each department's month-end spend based on the current daily burn rate. Only appears when at least one department has a monthly budget set and the day of month is >= 3. At-risk departments (projected to exceed budget) are highlighted with specific action bullets.

AI Security Alert (Outbound Dashboard)

A "Unusual Extension Activity" card that is **completely hidden during normal operation**. Every 6 hours a free SQL check compares each extension's last 7 days against a 30-day baseline. Only if a volume spike or international-call spike is detected does the card appear - and only then is an AI call made. PBX fraud detection without burning AI quota when nothing's wrong.

AI Suggest Departments (Extension Management)

A dedicated AI button row in Extension Management. Finds extensions with no assigned user name but with recent call activity (>=3 calls in last 30 days), and uses Gemini to suggest a department based on the destinations they're calling. You assign manually - AI just speeds up the triage.

Inbound Dashboard promoted to top-level nav

What used to live under Reports -> Inbound Analytics is now its own sidebar entry, second from the top. Outbound Dashboard sits at the top.

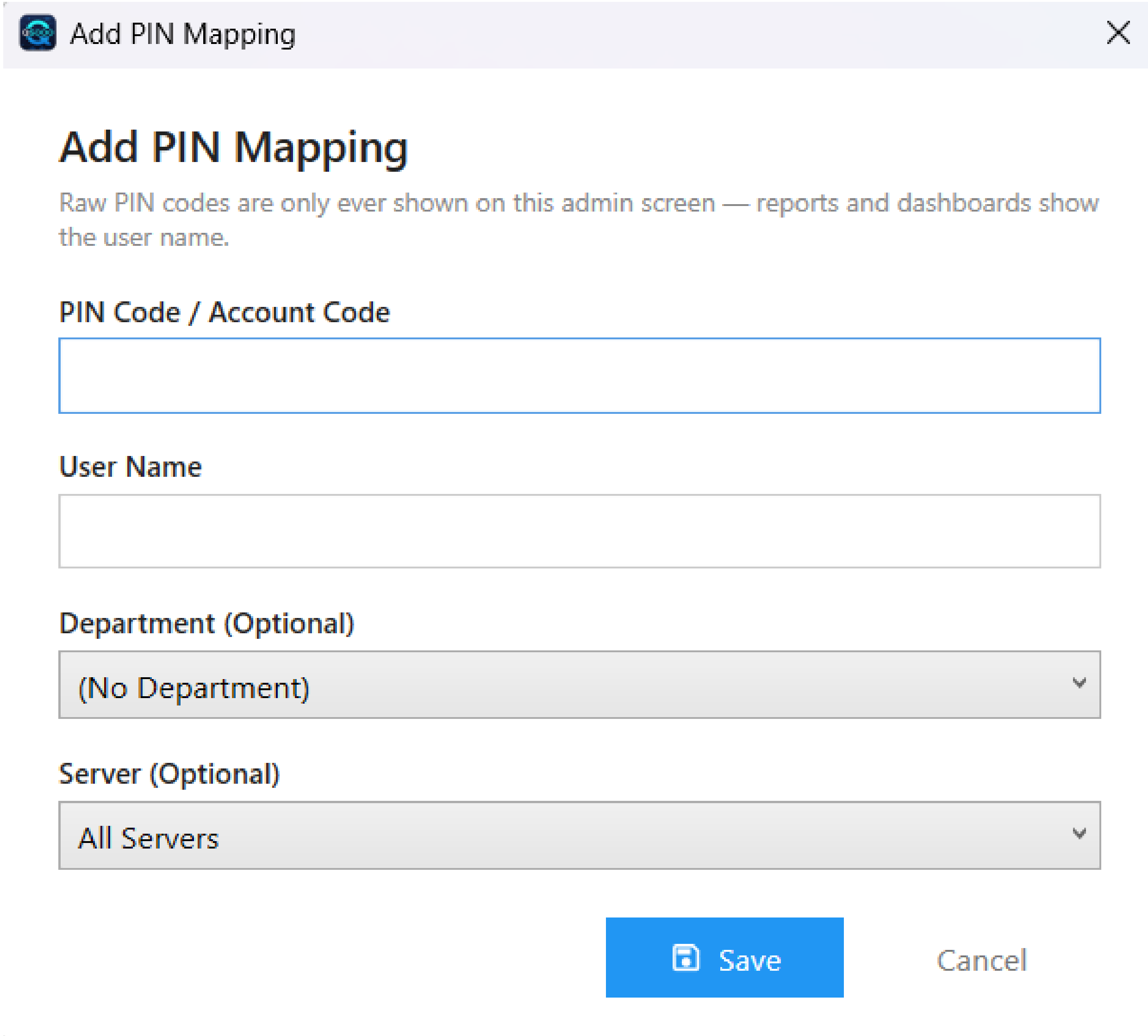
Common Tasks

Export Call Records to Excel

Reports -> Select date range -> Choose Excel format -> Generate

Add a New PIN Mapping

PIN Management -> Click + Add -> Enter PIN code and user details -> Save



The Add PIN Mapping dialog

Create a Department

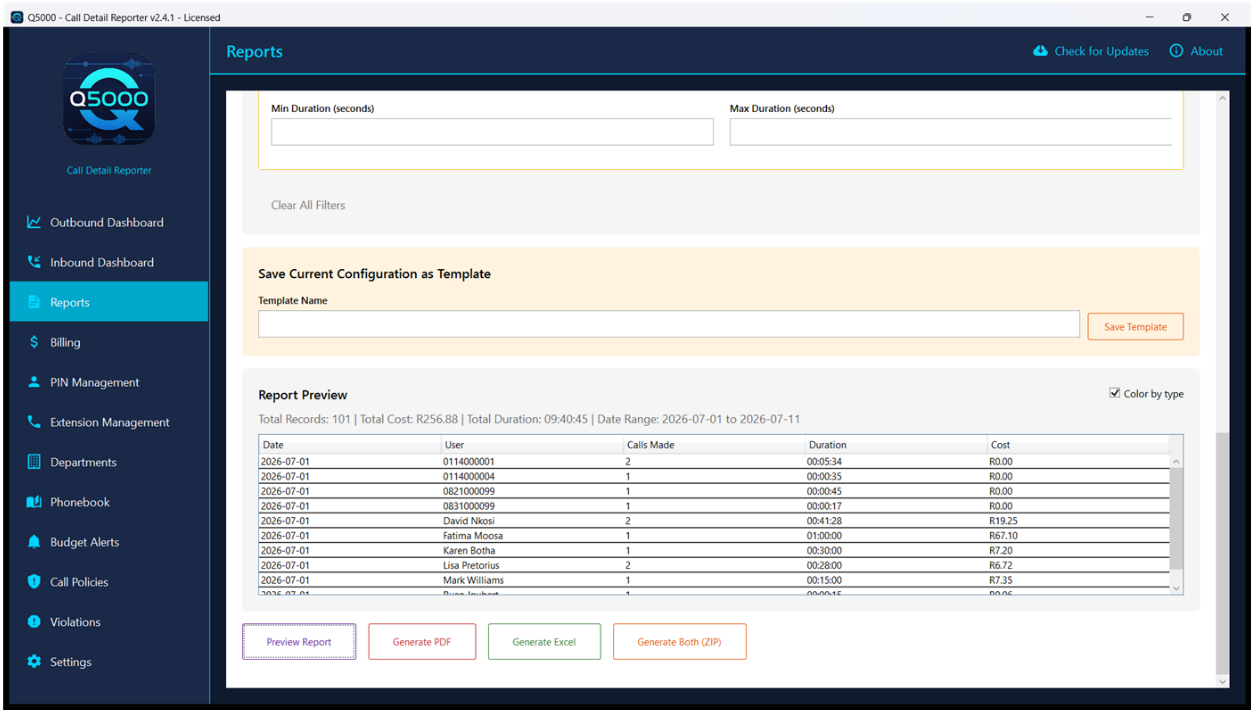
Departments -> Click + Add -> Enter name and budget -> Save

View Call Details

Dashboard -> Click on any call in the recent calls list -> View details

Generate a Monthly Report

Reports -> Select Month-to-Date -> Choose Monthly Report type -> Generate



Report Preview with totals and one-click PDF/Excel export

Track Budget Status

Dashboard -> View budget tiles -> Click to drill down -> See spending vs budget

Right-Size Department Budgets

Departments -> Click Review Budgets -> Review the three-month figures -> Untick or edit any row -> Apply Selected

Import Phonebook Contacts

Phonebook -> Click Import -> Download CSV template -> Fill in contacts -> Upload

Configure Cost Rules

Settings -> Cost Rules -> Add pattern (regex/prefix) -> Set rate per minute -> Save

Look Up an Unknown Number with AI

Phonebook -> Find unknown entry -> Click AI Brain icon -> Wait for results

Detect Personal Mobile Numbers Automatically

Reports -> Personal vs Business -> Set date range -> Click "Detect & Save Personal Numbers"

Import PINs with Server Assignment

PIN Management -> Click Import -> Upload CSV -> Server Assignment dialog allows you to assign all imported PINs to a specific server or "All Servers" with duplicate-skip option

Need Help?

• Click **About** button (top-right) for version and component information

• Use **Contextual Help** (?) dialogs on major views for feature details

• Check connection settings in Settings if data doesn't load

• Refer to the **User Guide** for detailed feature documentation

• Refer to the **Administrator Guide** for deployment and configuration

• Check application logs: **`%LocalAppData%\CDRReporter\logs\`**