



Contact Center

Portal Admin Tools

Quick Start Guide



Access Online Account

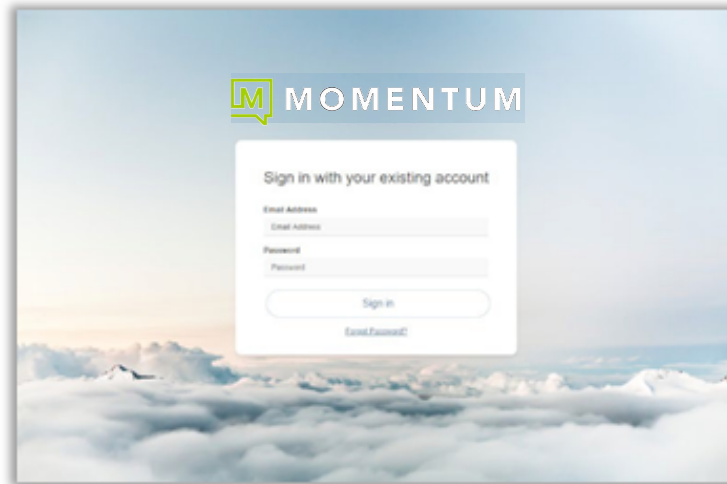
Call/Contact Center customers have access to a website that makes it easy for Administrators to customize and manage enterprise and subscriber account features and settings online. Although it is currently optimized for desktop usage, this Portal is accessible from any Internet-enabled device – desktop, laptop, tablet, or smartphone – so you can manage your services and review your information anytime, whether you are in the office or on the go.

Sign In

To Access the Online Portal:

1. Open a web browser and enter the URL (web address) provided to you for online account management.

To receive your initial sign in credentials (first time login) via email, please contact your organization's System Administrator for assistance.



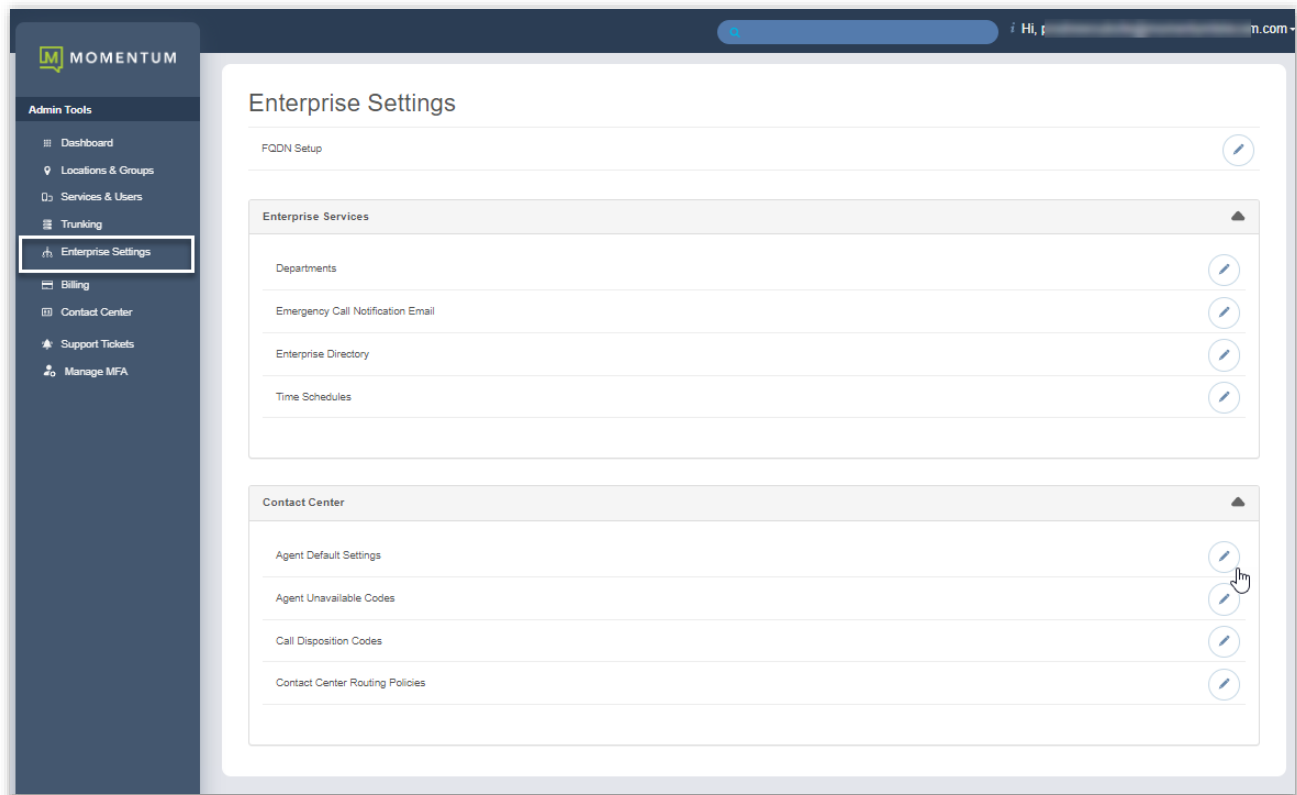
2. Enter the Admin Account Username (format = xxxxxxxxx@domain.xx) and Password credentials in the fields provided. Username and Password are case sensitive.
 - ❖ Use the [Forgot Password?](#) link to retrieve portal sign in credentials whenever necessary.
3. Click the [Sign In](#) button and follow any MFA protocol requirements - the Portal opens. Once you have signed into the Portal, access to the tools and features you need to easily manage communications services for the account or users is right at your fingertips.

For your security, the connection to the portal will automatically close and return to the Sign In page if it is idle for more than 10 minutes.

Global Call/Contact Center Setting Administration

The [Enterprise Settings](#) menu option opens that section for review and administration of the **global** feature settings for Call / Contact Centers in your environment.

In this section simply click on [Edit](#) adjacent to the desired Contact Center feature to view the [Edit](#) dialog and manage the settings.



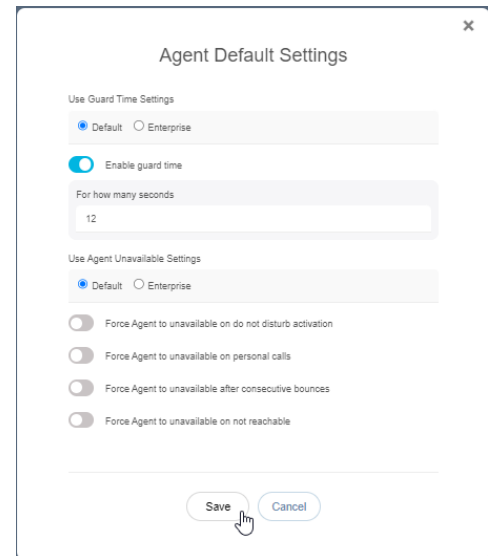
Enterprise Contact Center

Enterprise Agent Default Settings

Define and manage the default level Contact Center settings for agents to handle Guard Time settings and Agent Unavailable behaviors.

Manage Enterprise Agent Default Settings

1. Select and define the following settings for Agents assigned to the Contact Center:
 - ❖ Use Guard Time Settings: Click within the radial button to enable either Default or Enterprise.
 - ❖ Click within the box to Enable guard time and select the amount of time in *Seconds* using the drop-down menu.
 - ❖ Use Agent Unavailable Settings: Click within the radial button to enable either Default or Enterprise.
 - ❖ Click within the box to enable Force Agent to unavailable on do not disturb activation.
 - ❖ Click within the box to Force Agent to unavailable on personal calls.
 - ❖ Click within the box to Force Agent to unavailable after x consecutive bounces and specify the number of bounces using the drop-down menu.



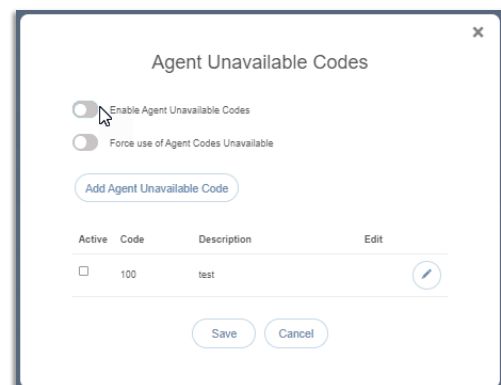
2. Click the [Save](#) button when settings are defined to submit the changes and close the dialog.

Enterprise Agent Unavailable Codes

Enable, add, and manage activation and usage of the codes that agents will use when unavailable for Contact Center calls. Click on [Edit](#) next to this feature to open its [Edit](#) view.

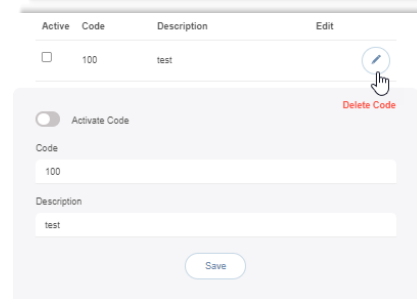
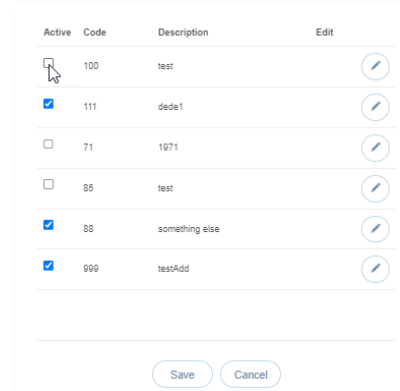
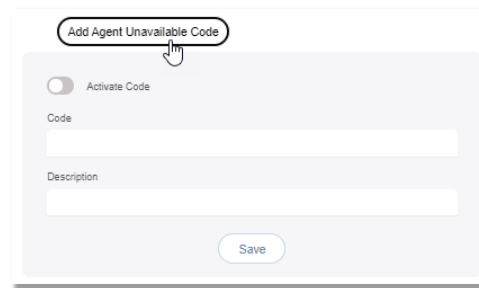
Enable Agent Unavailable Codes

1. Select and define the following settings, as needed:
 - ❖ Click within the box to Enable Agent Unavailable Codes.
 - ❖ Choose the Default Code on Do Not Disturb using the drop-down menu.
 - ❖ Choose the Default Codes personal calls using the drop-down menu.
 - ❖ Choose the Default Codes on consecutive bounces using the drop-down menu.
 - ❖ Click within the box to enable Force use of Agent Codes Unavailable with default code and select a code using the drop-down menu.
2. Click the [Save](#) button to submit the data and close the dialog.



Add Agent Unavailable Codes

1. Click on the [Add](#) button to begin adding a new code.
2. Click within the [Active](#) checkbox to *enable* the new code for usage.
3. Type the new [Code](#) in the field provided.
4. Type a [Description](#) / title that will be displayed for review in lists.
5. Click the [Save](#) button and close the dialog.
6. *Optional:* Review the list of codes and click within the boxes adjacent to each to Activate or Deactivate individual items.
7. Click the [Save](#) button to submit the changes and close the *Agent Unavailable Codes* edit settings dialog.

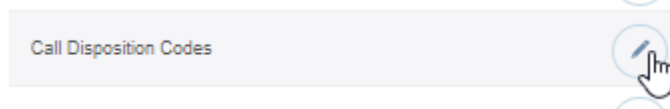


Edit Agent Unavailable Codes

1. Make changes to the following, as needed:
 - ❖ Active - Click to Enable/Disable Agent Unavailable Codes (all).
 - ❖ Choose and define alternate default code selections.
 - ❖ Choose whether to Force use of Agent Codes Unavailable with default code and select from the menu list.
 - ❖ Click to Activate or disable individual codes.
 - ❖ Click on the [Edit](#) link next to a Code in the list to change the code or the description, or to **Delete Code**.
2. Click the [Save](#) button(s) to submit the changes and close the dialogs.

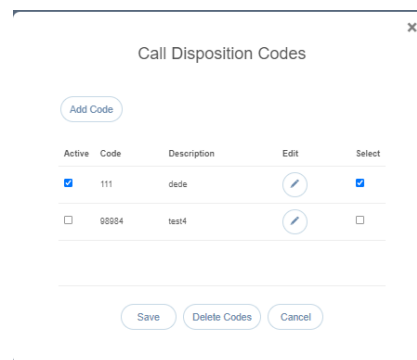
Enterprise Call Disposition Codes

Add and manage the enterprise level Call Disposition codes that are used for your organization's Contact Center(s). Click on [Edit](#) next to a feature to open its [Edit](#) view.



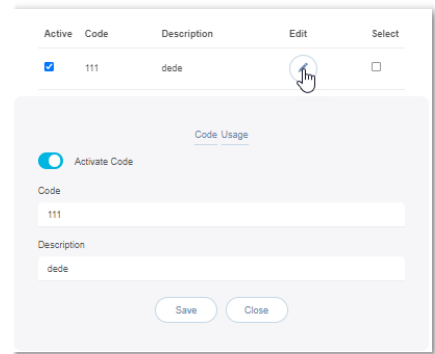
Add Call Disposition Codes

1. Click the [Add](#) button to create a new Call Disposition Code.
2. Click within the Active check box to Enable (default) or Disable the new code.
3. Enter the new Code in the field provided.
4. Type the Description (name) in the field provided.
5. Click the [Save](#) button to submit the new data and close the dialog.



Edit Call Disposition Codes

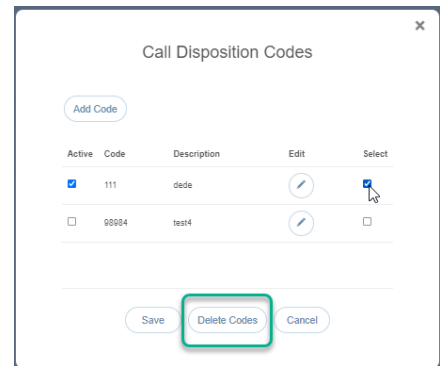
- In the Call Disposition Codes *Edit* view, you may make the following changes:
 - ❖ **Activate/Deactivate Call Disposition Codes:** Click within the Active checkbox to Enable or Disable the selected code.
 - ❖ **Edit Call Disposition Code information:** Click on the **Edit** option next to an item in the list to review and modify the Code and Description information.
- Click the **Save** button(s) to submit all changes and close dialogs.



Delete Call Disposition Codes

Caution: This action is immediate and cannot be undone.

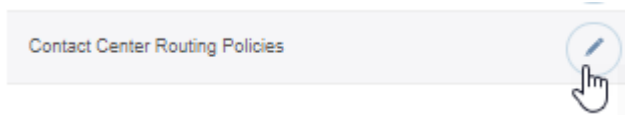
- Click within the check box in the **Select** column next to a listed code. *Example: Agent Unavailable Code.*
- Click on the **Delete Codes** button to remove the code from the system.
- Click the **Save** button(s) to submit all changes and close dialogs.



Enterprise Contact Center Routing Policies

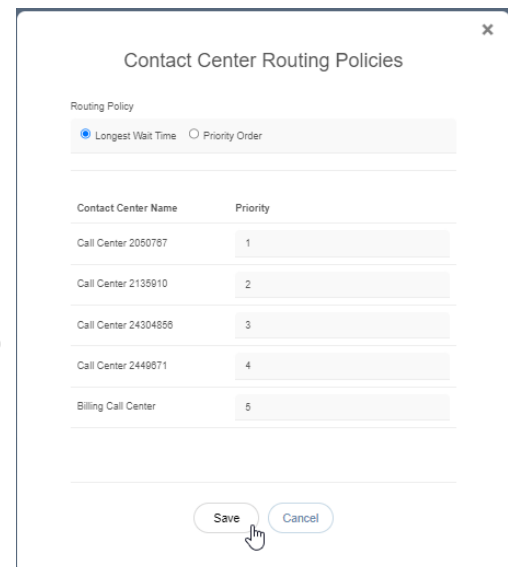
Administrator access to define and manage the type of call routing and/or the call priority level(s) to be used for your entire organization’s Contact Center(s).

Note: Please contact support for expert assistance with these settings. Click on the **Edit** button next to a feature to open its *Edit* view.



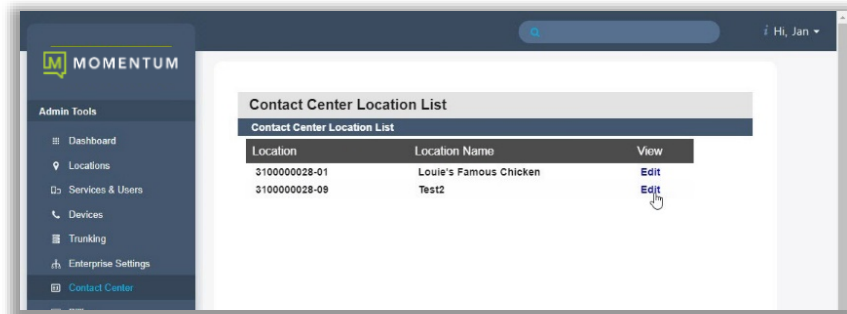
Manage Enterprise Contact Center Routing Policies

- Select an overall Routing Policy:
 - ❖ Click the radial button next to **Longest Wait Time** (default) or **Priority Order**.
 - ❖ If **Priority Order** is selected, define the order of priority (1, 2, 3...) for each of the listed Contact Centers.
- Click on the **Save** button to submit the changes and Exit. *See Contact Center Feature Glossary*



Individual Call/Contact Center Administration

The **Contact Center** page provides authorized Administrators with access to manage call flow / queue configurations and edit the settings of each Contact Center on the account. Simply select a Call/Contact Center in your list and click the adjacent **Edit** link to manage its settings, or click the **Configure** link to define the Basic, Advanced, and Routing Policy features to be used by the selected Call/Contact Center.



Edit Contact Center Queues

The **Edit** option for a listing in the **Contact Center** page opens the **Contact Center Queue List Edit** view where the fundamental activation, call behavior, Quality of Service (QoS), queuing, reporting, and log in requirements are defined.

Edit Contact Center Basics

- Make changes to the following, as needed.
 - Name:** Type the name of the Contact Center that will display in lists and reports.
 - Calling Line ID:** Type the Last Name and the First Name
 - Department:** Choose the appropriate department from the drop-down menu.
 - Language:** Select a language from the drop-down menu.
 - Time Zone:** Choose the appropriate option for the location of the contact center.
- Click the **Save** button or continue to the next section.

Edit Contact Center Group Policy Settings

Group Policy section:

- Define as needed:
 - Circular:** hunt agents in order listed on queue profile, starting where the last call left off
 - Regular:** Send calls to first available agent on list, always beginning at the top of the list.
 - Simultaneous:** Ring all agents at the same time; first user to answer handles the call.
 - Uniform:** Send calls to the agent that has been idle the longest.
 - Weighted Call Distribution:** (enables Skills-based routing) Distribute calls to idle agents per their Contact Center profile skill percentage assignments.
- Click the **Save** button or continue to the next section.

Edit Contact Center Bandwidth and QoS Settings

1. Select from the following setting options, as needed:
 - ❖ Preferred announcement / music codec for external calls: Use the drop-down menu to select from None, G.711, G.726, G.729 or AMR
 - ❖ Preferred announcement / music codec for internal calls: Use the drop-down menu to select from None, G.711, G.726, G.729 or AMR
2. Click the [Save](#) button to submit all changes and close the dialog - or continue to the next section.

Edit Contact Center Settings

1. Select and/or define the following Setting options, as needed:
 - ❖ Queue Length calls: Enter the minimum number of calls for the queue to trigger.
 - ❖ Enable video support: Click within the checkbox to enable/ disable
 - ❖ Play Ringing when offering call: Click within the checkbox to enable/ disable.
 - ❖ Allow callers to dial to escape out of queue: Enter the digit(s) a caller may dial to exit the queue.
 - ❖ Reset caller statistics upon entry to queue: Click within the checkbox to enable/ disable.
2. Click the [Save](#) button to submit all changes and close the dialog - or continue to the next section.

Edit Contact Center Reporting

The default settings are recommended. Contact support before making changes to Reporting Settings.

1. Select or define the following Reporting options, as needed:
 - ❖ Enable Contact Center External Reporting: Click within the checkbox to enable/ disable.
 - ❖ CCRs: Choose an option from the drop-down menu.
2. Click the [Save](#) button to submit all changes and close the dialog - or continue to the next section.

Edit Contact Center Agent Settings

1. Select or define the following Agent Setting options, as needed:
 - ❖ Allow agents to join Contact Centers: Click within the checkbox to enable/ disable.
 - ❖ Allow Call Waiting on Agents: Click within the checkbox to enable/ disable.
 - ❖ Enable calls to agents in wrap-up state: Click within the checkbox to enable/ disable.
 - ❖ Enable maximum ACD wrap-up timer _MM_ : _SS_ : Type the ADC wrap-up time limit in Minutes and/or Seconds
 - ❖ Automatically set agent state to ____ after call: Click within the checkbox to enable/ disable.
2. Click the [Save](#) button to submit all changes and close the dialog.

Reset Contact Center Queue Password

Manage the password for the Contact Center.

1. Click on the [Reset Contact Center Queue Password](#) link at the bottom of the dialog.
2. Type a new Password.
3. Retype the new Password.
4. Click the [Save](#) button to submit the change to the Call Center queue password.

Activate/Deactivate a Contact Center

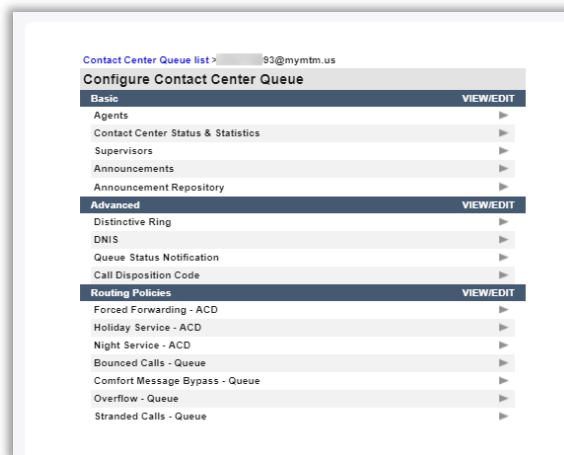
A checkmark in the Contact Center Edit dialog's Active field defines whether the queue is enabled/active.

1. Enable: Click to place a checkmark within the Active check box at the top of the dialog
2. Disable: Click to remove the checkmark within the Active check box to deactivate the queue while keeping all other settings in place for possible future use.
3. Click the [Save](#) button when finished to submit the change and close the dialog.

Configure Contact Center Features

The [Configure](#) option for a listing in the Contact Center page opens the *Contact Center Queue List* where the Basic, Advanced and Routing Policy feature settings may be managed. Activation for usage of many of these features must also be defined in the [Edit Contact Center Queue](#) section.

1. Click on the [Configure](#) link for a Contact Center listing to open the [Configure Contact Center Queue](#) dialog and review the features that may be administered.
2. Click on the arrow ► under the View/Edit column next to a feature to open its [Edit](#) view.

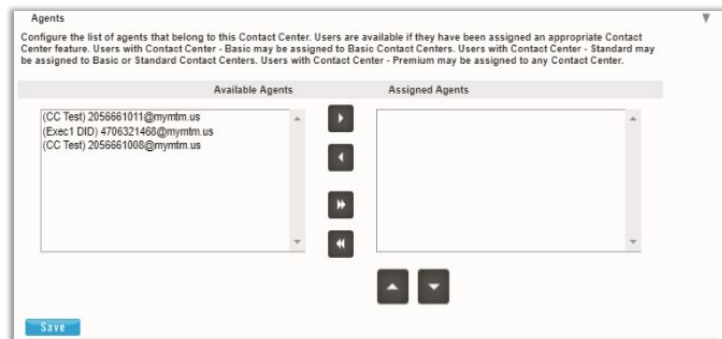


Contact Center Agents

Configure the list of agents that belong to the selected Contact Center. Users are available for selection if they have been *assigned* an appropriate Contact Center feature level.

- *Users with a Contact Center - Basic license may be assigned to Basic Contact Centers.*
- *Users with a Contact Center - Standard license may be assigned to Basic or Standard Contact Centers.*
- *Users with a Contact Center - Premium license may be assigned to any Contact Center.*

1. Use the ◀▶ arrows to move selected Available Agents to/from the Assigned Agents section.
2. Use the ▲▼ arrows to select and reorder the agents in the Assigned Agents list.
3. Click the [Save](#) button when finished to submit the data and close the dialog.



Contact Center Status & Statistics

Configure how the status and statistics of this Contact Center's activity are viewed and setup the email recipient(s).

- Select or enter required information for the following options for statistics and reporting, as needed:
 - ❖ **Daily Report:** Click to enable/disable.
 - ❖ **Statistics Source:** Select the appropriate option from the drop-down menu list.
 - ❖ **Reporting Period:** Select the appropriate number of days from the drop-down menu list, as needed.
 - ❖ **Email Addresses:** Enter email addresses in the fields provided, as needed.
- Click the **Save** button when finished to submit the data and close the dialog.

Contact Center Supervisors

Manage the Supervisors and Agent assignments for this contact center.


- Select Available Supervisors and use the arrows to move the selections to the *Assigned Supervisors* section.
- Click on the Assign Agents tab.
- Choose a Supervisor from the drop-down menu.
- Select from the Available Agents and use the arrows ◀ ▶ to move the selections to the Assigned Agents section.
- Repeat steps 3+4 for other Supervisors.
- Click on the **Save** button when finished to update the system and return to the Configure Contact Center Queue dialog.

Contact Center Announcements

Define the Announcement types and audio file selections for the Contact Center.

- Select and define the following announcement options, as needed:
 - ❖ **Play Entrance Message**
 - ❖ **Entrance Message is mandatory when played**
 - ❖ **Audio:** Select desired option:
 - **Default**
 - **URL** and enter the URL(s) in order of play
 - **Custom** and select File(s) in order of play.
- Click the **Save** button when finished to submit the data and close the dialog.

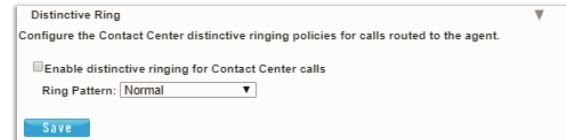
Contact Center Announcement Repository

Manage the announcements and greeting files used by this Contact Center. As with the Announcement Repositories for any Locations, Groups or Departments, the file requirements and current usage amounts for the Contact Center's announcement files are displayed to the Admin, and basic instructions for uploads and management are provided via the  [See instructions](#) link. See: [Announcement Repository](#)

Contact Center Distinctive Ring

Manage distinctive ringing policies for Contact Center calls routed to agents that have Distinctive Ring setup for use.

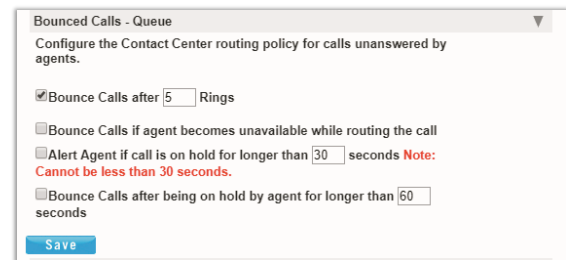
1. Click to Enable distinctive ringing for Contact Center Calls.
2. Ring Pattern: Select the desired ring tone pattern from the drop-down menu options.
3. Click the [Save](#) button when finished to update the system and close the dialog.



Contact Center Bounced Calls – Queue

Configure the Contact Center routing policy for unanswered calls.

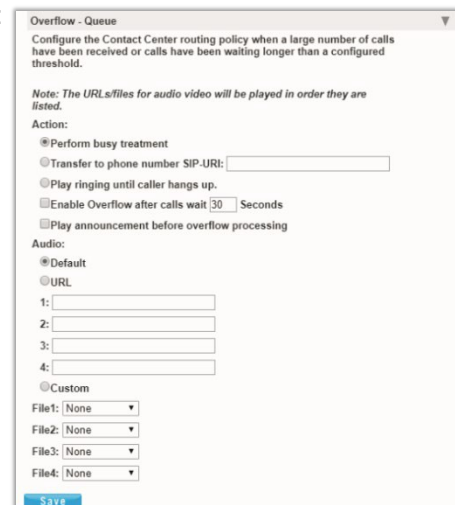
1. Enable the following options, as needed:
 - ❖ Bounce Calls after x Rings: Enter the number of rings if enabled.
 - ❖ Bounce Calls if agent becomes unavailable while routing the call.
 - ❖ Alert Agent if call is on hold for longer than x seconds. Enter 30+ seconds if enabled.
 - ❖ Bounce Calls after being on hold by agent for longer than x seconds. Enter an amount of time in seconds.
2. Click the [Save](#) button when finished to submit the data and close the dialog.



Contact Center Overflow – Queue

Configure the Contact Center routing policy, including announcements or videos for unanswered calls.

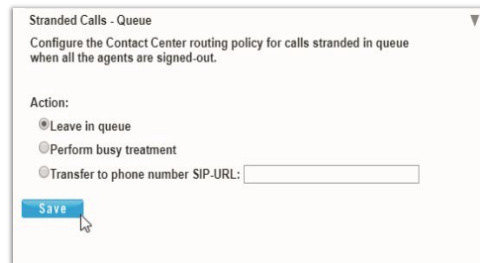
1. Select and define the following action and file options, as needed:
 - ❖ Perform busy treatment.
 - ❖ Transfer to phone number SIP URI.
 - ❖ Play ringing until caller hangs up.
 - ❖ Enable Overflow after calls wait x Seconds and select the amount of time (seconds) from the drop-down menu.
 - ❖ Play announcement before overflow processing and define the audio file(s)/types below.
 - ❖ Audio: Select desired option:
 - Default
 - URL and enter the URL(s) in order of play
 - Custom and select File(s) in order of play.
2. Click [Save](#) when finished to submit the data and close the dialog.



Contact Center Stranded Calls – Queue

Configure the Contact Center routing for calls stranded in queue when all agents are signed-out.

1. Select one of the following action options, as needed for the Contact Center Queue:
 - ❖ Leave in queue
 - ❖ Perform busy treatment
 - ❖ Transfer to phone number SIP-URI: Click to enable and enter the appropriate 10-digit number to which calls will be forwarded.
2. Click the [Save](#) button when finished to submit the data and close the dialog.



Stranded Calls - Queue

Configure the Contact Center routing policy for calls stranded in queue when all the agents are signed-out.

Action:

Leave in queue

Perform busy treatment

Transfer to phone number SIP-URL:

[Save](#)

Activate/Deactivate a Contact Center

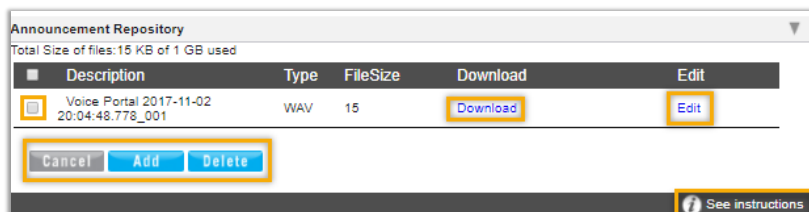
A checkmark in the Contact Center Edit dialog's Active field defines whether the queue is enabled/active.

1. Enable: Click to place a checkmark within the Active check box at the top of the dialog
2. Disable: Click to remove the checkmark within the Active check box to deactivate the queue while keeping all other settings in place for possible future use.
3. Click the [Save](#) button when finished to submit the change and close the dialog.

Announcement Repository

Manage the announcements and greetings that are available for selection by the group or call center. This feature offers the ability to upload and store announcements and messages. Files uploaded and stored in the group Announcement Repository are available within selection lists when setting up Voicemail greetings and announcement messages.

While in the Settings page, click the adjacent ► arrow under View/Edit to open the Edit view.



The repository offers up to 1 GB of storage space. The total amount of storage that has been used displays for review. Maximum file size for audio announcements is 5 MB in CCIT u-Law 8kHz, 8-bit Mono format. Basic Instructions and file size requirements are provided via the **See Instructions** link in the Edit view.

Add an Announcement File

1. Click on the [Add](#) button to begin.
2. Type the [Name](#) to be displayed in file selection lists.
3. Click on the [Choose File](#) button to select a local audio file to upload into the repository.
4. Click the [Save](#) button.

Download an Announcement File

1. Click on the [Download](#) link.
2. Select the local folder you wish to use to store a copy of the file.

Edit an Announcement File

1. Click on the [Edit](#) link next to an Announcement to view its Settings.
2. Change the Name as needed.
3. Click the [Choose File](#) button to navigate to and select a new file to upload/replace the announcement.
4. Click on the [Save](#) button to submit changes and exit.

Delete an Announcement File

Caution: This action is immediate and cannot be undone.

1. Click to place a check in the box next to an Announcement.
2. Click on the [Delete](#) button. The removal action is immediate and cannot be undone.

Contact Center Feature Glossary

Group Policies

The selection determines how incoming calls are distributed to available agents.

Hunting options include:

- ❖ **Circular:** Hunt agents in the order listed within the queue profile, starting where the last call left off and repeating through the list over and over.
- ❖ **Regular:** Send calls to first available agent on list, always beginning at the top of the list.
- ❖ **Simultaneous:** Ring all agents in the group at the same time; first user to answer handles the call.
- ❖ **Uniform:** Send calls to the agent that has been idle the longest.
- ❖ **Weighted Call Distribution:** (This feature enables skills-based routing.) Distribute calls to idle agents in correspondence to the skill percentages assigned to user in the Contact Center profile.

Routing Policies

Automatic Call Distribution (ACD) recognizes, answers and routes incoming calls. Routing policies define the rules the system will use to handle incoming calls in specified instances.

Options include:

- ❖ **Forced Forwarding:** Temporarily redirect new incoming calls to a different destination than the set route for Night Service or Overflow. Enabling Forced Forwarding does not affect any calls that are already in queue.
- ❖ **Holiday Service:** Set specific routing actions for calls received during user-defined holiday schedules. Holiday Service can perform busy treatment, transfer call or play announcements, as specified.
- ❖ **Night Service:** Route calls differently after user-defined scheduled business hours. Night Service actions can be set to perform busy treatment, transfer call or play an announcement.
- ❖ **Bounced Calls:** Calls routed to an agent but not answered within a set number of rings.
- ❖ **Overflow:** Calls that exceed the threshold of Queue Length or wait time configured for queue.
- ❖ **Stranded Calls:** Calls that are in the queue when there are no agents signed-in to queue.

Premium Features

- ❖ **Agent Codes Unavailable:** Create or enable a set of customized Unavailable codes showing the reason the agent is in unavailable ACD state. Conditions to force agent ACD state to Unavailable include Do Not Disturb, Personal Calls and Consecutive bounces.
- ❖ **Call Disposition Codes:** Apply during call or at wrap-up to tag calls in reports to track the result of promotions, the result of calls, the purpose of calls, or other items. Administrators can create and customize up to 1000 Disposition Codes.
- ❖ **DNIS:** Determine what phone number was dialed with Dialed Number Identification Service (DNIS). Assigning specific agents, types of calls, and/or priority levels to each DNIS ensures that each incoming call is handled with optimal efficiency.