



Admin Portal Manual



Table Of Contents



Logging On

Logon to the Telax Administration Interface – known as the Admin Portal - by populating Internet Explorer's address field with the following URL:

<https://admin.telax.net>



To prevent unauthorized access of the system, users must enter a valid name and password to establish a session.

When the **Telax Call Center Admin Portal** page loads, the *Log On* fields are displayed:

Notes:

- The *User Name* field is not case-sensitive
- The *Password* field is case-sensitive
- User names are unique within the system; however, more than one session can be run at the same time



Please enter your credentials

Company Id:	<input type="text" value="telax"/>
User Name:	<input type="text" value="telaxadmin"/>
Password:	<input type="password"/>
	Forgot your password?
	<input type="button" value="Sign In"/>



The password will not be displayed when it is typed in, only stars will be displayed in the password field.

Company Id:

User Name:

Password:

[Forgot your password?](#)

When a Telax system is initiated a client Team Member will be given the Admin Portal username and a password by the Telax Project Manager.

If at any time a user forgets the password, it can be retrieved by contacting Telax using the **'Forgot your password?'** link underneath the login fields.

Clicking on the link will open a new page where users are able to enter the company ID and the User Name.

Password Reset Request

I

In order to initiate the process of renewing your password, you need to provide the following information.

Company Id:

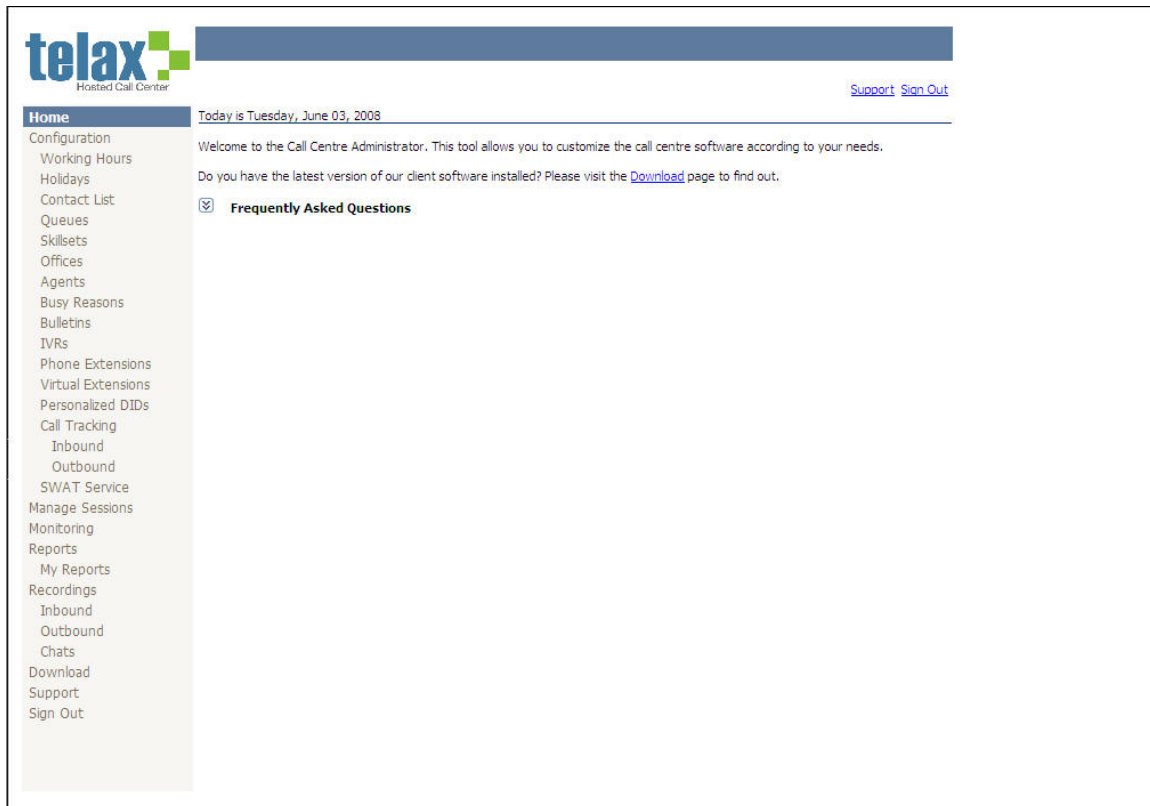
User Name:

Once the information is entered in the fields the user clicks on the **'Continue'** button.

The password will then be re-set and the new password will be e-mailed to the pre-configured address associated with that username.

The Main Page

Once a user is successfully logged in to the Admin Portal they will see the main menu down the left side of the page and in the main area of the window. Any Telax news will be posted there, as well as a drop-down field with Telax-related Frequently Asked Questions.



The screenshot shows the Telax Admin Portal interface. At the top left is the Telax logo with the text "Hosted Call Center". To the right of the logo is a dark blue horizontal bar. Below the logo, there is a navigation menu with the following items: Home, Configuration, Working Hours, Holidays, Contact List, Queues, Skillsets, Offices, Agents, Busy Reasons, Bulletins, IVRs, Phone Extensions, Virtual Extensions, Personalized DIDs, Call Tracking, Inbound, Outbound, SWAT Service, Manage Sessions, Monitoring, Reports, My Reports, Recordings, Inbound, Outbound, Chats, Download, Support, and Sign Out. The main content area displays the date "Today is Tuesday, June 03, 2008" and a welcome message: "Welcome to the Call Centre Administrator. This tool allows you to customize the call centre software according to your needs." Below this, there is a link to "Download" and a section titled "Frequently Asked Questions" with a double arrow icon to its left.

The menu visible on the left side of the Main Page is how users will navigate to the different functions of the Admin Portal and each will be discussed in detail in this document.

If an Admin Portal user's access has been limited, then in the menu that user will only be able to see the functions he/she has access to.

To see the FAQs, a user simply clicks on the double arrow beside the Frequently Asked Questions label.

Frequently Asked Questions

A list of FAQs will be displayed and users can click on the appropriate topic they want information on.

⊗ **Frequently Asked Questions**

- [Are outbound calls included in the reporting?](#)
- [Can I still use my phone's features?](#)
- [How can I see a list of my agent's outbound calls?](#)
- [How can I test that I am logged in can receive calls ok?](#)
- [How come changes to the agent's settings \(queues, force to available, time parameter changes, etc\) have not taken effect?](#)
- [How come there is a disparity between received calls and queued calls?](#)
- [How do I dial out in North America or International?](#)
- [How long does it take to make a change to the system?](#)
- [How often will the system be unavailable?](#)
- [I can't access my recordings. A message across the bottom says "recordings currently not available", what do I do?](#)

When a user clicks on the topic they want to see that topic will open up and the user can read the information that will assist them.

⊗ **Frequently Asked Questions**

- [Are outbound calls included in the reporting?](#)
- [Can I still use my phone's features?](#)
- [How can I see a list of my agent's outbound calls?](#)
- [How can I test that I am logged in can receive calls ok?](#)
- [How come changes to the agent's settings \(queues, force to available, time parameter changes, etc\) have not taken effect?](#)
- [How come there is a disparity between received calls and queued calls?](#)
- [How do I dial out in North America or International?](#)
- [How long does it take to make a change to the system?](#)
- How often will the system be unavailable?**
Telax recognizes two layers in our infrastructure. Critical and non-critical. Critical is defined as the layer affecting live calls. Non-critical layer contains various ancillary services such as reporting and recording. Telax strives to maintain maximum uptime for the critical layer. Non-critical systems may be maintained and upgraded in such a way that can cause unavailability for short periods. If an non-critical layer maintenance/upgrade is occurring at an inconvenient time call your account manager or technical support.
- [I can't access my recordings. A message across the bottom says "recordings currently not available", what do I do?](#)

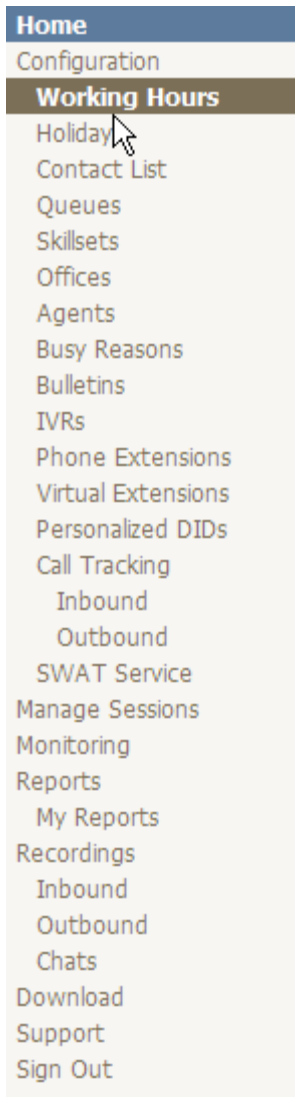
If a user is finished with their Admin Portal session, it is always advisable to sign out of the session. Users can do this by clicking on the **Sign Out** button in the top right corner of the main page. Clicking on the **Sign Out** button ensures that the session is not left running. Closing the window will also end a user's Admin Portal session.

There is also a link to the support page from the top right corner of the page. For detailed information on how the **Support** page works, see the Support section on page XX of this document

[Support](#) [Sign Out](#)

The **Support** and **Sign Out** buttons are available at the top of every page in the Admin Portal.

The Menu



From the options listed in the Admin Portal menu, users will be able to navigate to the different areas required to administer a Telax IVR system.

The following are brief descriptions of what a user will be able to do on each page.



Configuration Tools:

Working Hours – from this page users will set the hours that the IVR will be manned and set the ‘closed’ hours.

Holidays – from this page users will define the statutory (or other) holidays when the IVR will not be manned by live agents. Please note that the dates specified in this page are what triggers the Holiday Message (Prompt 114) to play.

Contact List – on this page users will be able to create a contact listing available for viewing by all authorized Admin Portal users.

Queues – on this page users will be able to manage the queues set up in an IVR. Performance thresholds can be defined, voicemail e-mails can be defined, and queue priorities can be set.

Skillsets – from this page users will be able to create default skillsets that agents can be grouped by.

Offices – from this page users can create office groups that will be used to define users and teams.

Agents – from this page users will create skillset-based teams as well as individual user profiles for each team member.

Busy Reasons – from this page users will create unavailable status reasons to be used by agents for functions not captured by the default busy status reasons in the Call Center Application.

Bulletins – from this page users will configure the behaviour of the IVR when bulletin messaging is enabled.

IVRs – from this page users will be able to configure some aspects of how their IVR functions.

Phone Extensions – from this page users will be able to configure permanent phone extensions if they do not wish agents to be able to change workstations.

Virtual Extensions – from this page users will be able to configure information that appears in the Call Center Application phonebook.

Personalized DIDs – from this page users will be able to manage personalized DIDs that may be assigned to agents.



Inbound Call Tracking – from this page users will be able to manage how agents will classify inbound calls in the Call Center Application.

Outbound Call Tracking – from this page users will be able to manage how agents will classify outbound calls in the Call Center Application.

SWAT – from this page users will manage the individuals and group definitions of those who will receive messages generated and delivered by the SWAT function.

Manage Sessions – from this page users will be able to manage the active sessions of agents as well as manage users logged in blindly.

Monitoring – from this page users will be able to monitor the activity of agents who are logged in.

Reports – from this page users will be able to set parameters for and run reporting for their operations

My Reports – from this page users will be able to access all the reports they have configured and run in the last 7 days.

Inbound Recordings – from this page users will be able to search for and listen to inbound call recordings.

Outbound Recordings – from this page users will be able to search for and listen to outbound call recordings.

Chats – from this page users will be able to search for and review all chats by agents.

Download – from this page users are able to download the latest version of both the Call Center Agent application and the Call Center Monitor application.

Support – from this page users will be able to contact Telax Technical Support via e-mail, live chat or retrieve the Telax Support phone number.

Sign Out – this link will sign a user out of the Admin Portal.

Working Hours

Every client needs to determine the working hours for their Telax IVR. This is accomplished from the Working Hours page. Even if a call center is in operation 24/7/365 it must be defined in the working hours page. The working hours for the IVR determine when agents will receive calls. If an agent is logged in after-hours, no new calls or chats will be routed to them.

[Support](#) [Sign Out](#)

Working Hours:

Week Day	Operation Status	Opening Time (hh:mm)	Closing Time (hh:mm)	Comments
Holiday	Closed	N/A	N/A	
Sunday	Closed	N/A	N/A	
Monday	Open	08:00	16:30	
Tuesday	Open	08:00	16:30	
Wednesday	Open	08:00	16:30	
Thursday	Open	08:00	16:30	
Friday	Open	08:00	16:30	
Saturday	Closed	N/A	N/A	

This example shows a facility that is open Monday to Friday from 08:00 to 16:30 and closed on weekends and holidays.

To set or change the hours of a facility a user must first select the operation status. From the drop down menu users can select either **Open** or **Closed** operation status.



Users will then set the operations hours for each day, as well as the hours of operations for holidays.

To set the opening time for each day click in the field for that day under the **Opening Time** column. Using the Hours:Minutes format of hh:mm, enter the time agents will begin receiving calls. All times must be entered in the 24 hour clock format.



To set the closing time for each day click in the field for that day under the **Closing Time** column. Using the hh:mm format again, enter the time that agents will no longer receive calls for the day.

For those days when a facility is closed completely users will select the **Operation Status** as **Closed** and enter **N/A** for both the opening and closing time.

To create the correct configuration for a 24/7 operation users will set the **Operation Status** as **Open** for each day as well as Holidays. The **Opening Time** will be entered as **00:00**. The **Closing Time** will be entered as **23:59**. Below is an example of a 24/7 operation configuration.

[Support](#) [Sign Out](#)

Working Hours:

Week Day	Operation Status	Opening Time (hh:mm)	Closing Time (hh:mm)	Comments
Holiday	Open	00:01	23:59	
Sunday	Open	00:01	23:59	
Monday	Open	00:01	23:59	
Tuesday	Open	00:01	23:59	
Wednesday	Open	00:01	23:59	
Thursday	Open	00:01	23:59	
Friday	Open	00:01	23:59	
Saturday	Open	00:01	23:59	

Holidays

In the **Holidays** section of the Admin Portal users will configure the days that their facility will be closed to observe statutory or other holidays. The holidays that a user configures here will be tied directly to the **Holiday Prompt #114** in the IVR.

With a Telax IVR, users are able to have holidays specified for both US and Canadian customers if they have operations in both countries. This feature must be built in to the design of an IVR and if it is not programmed in, the feature will not be available. Having the feature enabled can be facilitated by contacting a Telax Project Manager.

Each individual holiday needs to be configured in the Admin Portal.

To Add A Holiday

To begin configuring applicable holidays, users will click on the **Add Holiday** button at the top of the page.



Once a user clicks on the **Add Holiday** button a new row of fields will be displayed.



National Holidays for Canada		Add Holiday
Date	Description	
Update Cancel Jun 04	[New Holiday]	

To enter the new holiday, enter the date of the holiday and the description. Once the information is entered, users must click on the **Update** link at the left side of the row. If the **Update** link is not clicked the information will not be saved.

Users may add as many holidays as required, but be aware that only holidays for the current calendar year can be entered.

Holidays can be modified at any time by clicking on the **Edit** link to the left of any existing holiday entry. They can also be removed by clicking on the **Delete** link.



Date	Description	
Edit Delete Jan, 01	New Year's Day	
Edit Delete Dec, 25	Christmas	

Whenever a holiday is scheduled in the Admin Portal, the message that users record in **Prompt #114** will automatically play. Users have the option of recording one generic holiday message that will play for all holidays, or the message can be re-recorded and customized for each holiday.

Note: Any time a user changes a prompt message, their Telax PM must be notified so that the new message can be activated by the IVR team.

Contact List

The **Contact List** in the Admin Portal is a directory shared by all Admin Portal users in each client group. For example, all users with access to the Admin Portal using the Company ID ABCCompany will be able to see the entries created in the **Contact List** by all the ABCCompany users.

To create a Contact entry, click on the **Add Contact** button on the top right of the page.

Add Contact

Once a user clicks on the **Add Contact** button a new row of fields will appear.

Contacts: **Add Contact**

	Contact Name	Contact Type	Tel. Office	Tel. Mobile	Email
Update Cancel	<input type="text"/>	<input type="text" value="Billing"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Users enter the appropriate information in each field and click on the **Update** link to the left of the row. If the **Update** link is not clicked, the information entered will not be saved.

The drop-down menu under **Contact Type** is static, but new entries that are user-focused can be added. Requests should be submitted to a Telax Project Manager.

Any existing entry in the **Contact List** can be modified by clicking on the **Edit** link to the right of the entry.


Any existing entry in the **Contact List** can be deleted by clicking on the **Delete** link to the right of the entry.

Contacts: **Add Contact**

	Contact Name	Contact Type	Tel. Office	Tel. Mobile	Email
Edit Delete	Joe Public	Other	000-000-0000	000-000-0000	joe.public@telax.com

Queues

This is where users will administer certain functions of the **Queues** built in the IVR. The entries on the Queues page are created when a queue is built in an IVR.

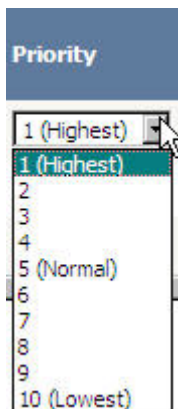

Update

Name	Type	Priority	Acceptable Waiting Time	Elevated Waiting Time	Maximum Waiting Time	Dequeuing Enabled	Mailbox
Customer Service	IVR	1 (Highest)	00:00:40	00:02:00	00:05:00	No	koray.parmaks@telax.com
Sales	IVR	1 (Highest)	00:00:40	00:02:00	00:05:00	No	koray.parmaks@telax.com
Technical Support	IVR	1 (Highest)	00:00:40	00:02:00	00:05:00	No	koray.parmaks@telax.com

The configurations that a user can manage are:

Queue Name: This is the name of the queue and identifies each queue on the **Call Center Agent (CCA)**, the **Call Center Monitor (CCM)**, and in any reports that display the **Queue** field.

Priority: This alters the priority with which queues are answered in the IVR. The lower the number, the higher the priority. The drop-down menu allows a user to select a priority level from 1 to 10.



For example, a queue named Sales is given a priority of 4 in the Admin Portal, and a queue named Customer Service is given a priority of 5 in the Admin Portal. If there is a caller who selected the Sales option and two callers who selected the Customer Service option, the caller who selected Sales will have their call answered before those who selected the customer service option, even if the Customer Service callers have been in queue longer.

Acceptable Waiting Time: This setting affects color coding displayed on the **Call Center Monitor (CCM)**. The default color calls in queue within the **Acceptable Waiting Time** is Green.



By adjusting this setting users indicate what period of time is acceptable for callers to wait on hold for an available agent.

Elevated Waiting Time: This setting affects color coding displayed on the **Call Center Monitor**. The default color calls in queue within the **Elevated Waiting Time** is Orange. By adjusting this setting users indicate what period of time is too long, but not critical for callers to wait on hold for an available agent. The **CCM** will display any calls waiting from one second past the **Acceptable Waiting Time** to the limit set in the Elevated Waiting Time

Maximum Waiting Time: This setting affects color coding displayed on the **Call Center Monitor**. The default color calls in queue above the **Maximum Waiting Time** is Red. By adjusting this setting users indicate what at what point a caller has waited too long on hold for a live agent.

Note: Color coding on the Call Center Monitor allows supervisors the ability to quickly see how their queues are being managed. This is especially helpful to track if SLAs are being met. If SLAs are at risk of slipping, supervisors may be able to take appropriate action with their teams to adjust call handling and recover the SLAs.

Dequeuing Enabled: This option activates and de-activates the Dequeuing method selected at the time an IVR is designed. At the Maximum waiting time, a queue can be designed to send a caller to voicemail, ask them to call back later and terminate the call, or allow the callers to continue to hold for the next available agent.

By adjusting the **Dequeuing Enabled** status, users can 'turn on' and 'turn off' the Dequeuing option. By turning on the option (selecting Yes in the drop-down) at the **Maximum Waiting Time** callers will be dequeued. By turning the option off (selecting No in the drop-down) callers will be allowed to continue to hold for the next available agent.

If no **Dequeuing** method was selected during the design of the queue adjusting the **Dequeuing Enabled** status to Yes will cause the IVR to terminate the call at the set **Maximum Waiting Time**.

*Note: Unless directed otherwise by a client, Telax IVRs are defaulted to send callers to voicemail at the Maximum Waiting Time when enabled. Even if a client is not opting to have a voicemail feature in their queue, a 'please leave a message after the tone' message should still be recorded in **Prompt #113**.*

Mailbox: This is where a user defines the e-mail that all voicemails left by callers in this queue will be sent. Voicemails can be e-mailed to one or more addresses. To enter multiple addresses, use a semi-colon (;) and a space between each address.

Note: All voicemail on a Telax IVR is captured as a .wav file and delivered via e-mail.

Skillsets

Users can configure master skillsets that will be applied to agents. This is particularly useful when a call center had many different teams of agents with the same skillsets. A user needs to create the **Skillset** once and can then assign it to as many agents as necessary.

Skillsets: Add Delete

Default Skillset

Provider ENG Skillset

DEC ENG

Team French

DR Skillset

Selected Skillset:

Default Skillset Update

Skillset Properties:

Skill (queue)	Priority
<input type="checkbox"/> Customer Service	10 (Lowest) ▼
<input type="checkbox"/> Sales	10 (Lowest) ▼
<input type="checkbox"/> Technical Support	10 (Lowest) ▼

A **Skillset** is the group of tasks that an agent is trained and able to perform. Different agents are often trained for different functions, have abilities in different languages etc., and creating **Skillsets** allows users to easily assign agents to the appropriate tasks. When configuring **Skillsets** in the Telax IVR, users will define what queues agents have access to.

To create a new skillset, click on the Add button. The **Selected Skillset** field will be updated to show **New Skillset**. Type over that to name the new skillset. In the example below the new skillset is named **Test Skillset**.

Selected Skillset:

Test Skillset Update

Now the new skillset must be configured. In this step users will indicate which queues agents in each skillset will be logged in to and the priority that those agents will get those calls.

To enable a queue within a skillset first users must click the box beside the queue name. If a checkmark appears in the box, the queue is enabled for that skillset. If the box is empty, that queue is not enabled.

Selected Skillset:

Test Skillset Update

Skillset Properties:

Skill (queue)	Priority
<input checked="" type="checkbox"/> Customer Service	10 (Lowest)
<input checked="" type="checkbox"/> Sales	10 (Lowest)
<input type="checkbox"/> Technical Support	10 (Lowest)

In this example, the Customer Service and Sales queues have been enabled, but Technical Support is not.

Once the queues have been enabled, the priority must be set for those queues within the skillset. Setting the priority will determine if calls from one queue will be handled by agents before calls from another queue.

To change the priority of a queue, use the dropdown menu to select a rating from one to ten – one having the highest priority and ten having the lowest. In the below example, calls from the Sales Queue have been given a priority of 1 and calls from the Customer Service queue are given a priority of 3. This means that a caller holding in the Sales queue will have their call handled by an agent before a caller holding in the Customer Service Queue.

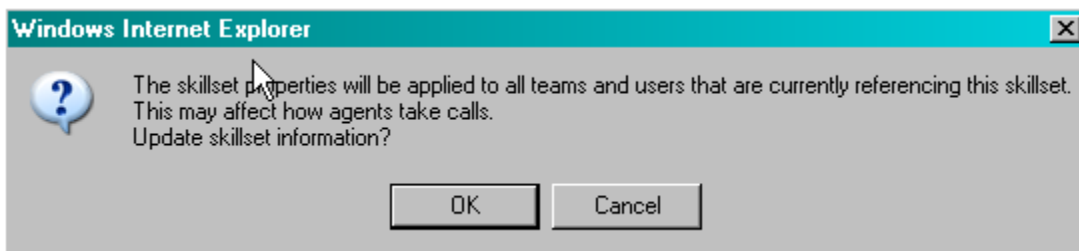
Selected Skillset:

Test Skillset Update

Skillset Properties:

Skill (queue)	Priority
<input checked="" type="checkbox"/> Customer Service	5 (Normal)
<input checked="" type="checkbox"/> Sales	3
<input type="checkbox"/> Technical Support	10 (Lowest)

When this step is complete, click on the **Update** button to complete the creation of the new skillset. The below caution window will appear.



If the skillset is created as it should be, click on OK to create the skillset.



Agents will be assigned to this new skillset from the **Agents** configuration page. When users create the working teams in their call centers those teams will be assigned skillsets as created in this configuration step.

Existing **Skillsets** can easily be modified from this page in the **Admin Portal**. To modify a Skillset highlight it in the box listing all the existing **Skillsets** by clicking on it.

Skillsets:

Default Skillset
Provider ENG Skillset
DEC ENG
Team French
DR Skillset
Test Skillset

Selected Skillset:

Skillset Properties:

Skill (queue)	Priority
<input checked="" type="checkbox"/> Sales	1 (Highest)
<input checked="" type="checkbox"/> Technical Support	5 (Normal)
<input type="checkbox"/> Customer Service	10 (Lowest)

When a user clicks on an existing **Skillset** the information for that **Skillset** will be displayed. To modify the **Skillset** users can change priority of different queues or rename the **Skillset**. Once changes are done the **Update** button must be clicked for changes to take effect. The warning window will appear and if a users is sure the changes are correct, **OK** is clicked and the changes are saved.

If a team has already been assigned the modified **Skillset** the changes will take effect the next time an agent on that team logs in.

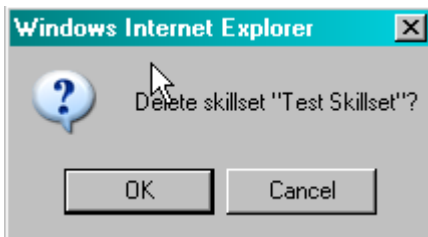
Existing **Skillsets** can also be deleted from this page. Before deleting a **Skillset** users must ensure that no teams are still assigned to the skillset. If a user attempts to delete an assigned **Skillset** the below error will appear at the top of the page:

Operation could not be completed, the skillset is either in use, or it cannot be deleted.

Skillsets: Add Delete

Default Skillset
Provider ENG Skillset
DEC ENG
Team French
DR Skillset
Test Skillset

If a **Skillset** is not assigned to any teams or agents the skillset can be successfully deleted. When the below caution opens, users will click **OK** if they are sure that the selected **Skillset** is to be removed.



By clicking on **OK** users will delete the selected **Skillset**.

Offices

The **Offices** page can be used to assign team members to specific geographic locations. If an operation has only one geographic location, the default office is **Main Office** and all team members will be assigned to the **Main Office**. For those operations with more than one location configuring the **Offices** page will allow users to report based on each **Office**.

Offices:

Main Office
Vancouver
Washington
Manila HQ
New York Branch Office

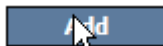
Selected Office:

Office Members:

<input checked="" type="checkbox"/> Agent A	<input checked="" type="checkbox"/> Demo User	<input checked="" type="checkbox"/> New Agent	<input checked="" type="checkbox"/> Steve Turton
<input checked="" type="checkbox"/> Agent B	<input checked="" type="checkbox"/> Don Butler	<input checked="" type="checkbox"/> New Agent	<input checked="" type="checkbox"/> Sue Saucedo
<input checked="" type="checkbox"/> Bryan Aust	<input checked="" type="checkbox"/> Doreen Birkholz	<input checked="" type="checkbox"/> New Agent	<input checked="" type="checkbox"/> Sue Saucedo
<input checked="" type="checkbox"/> C I	<input checked="" type="checkbox"/> Eric Gervais	<input checked="" type="checkbox"/> New Agent	<input checked="" type="checkbox"/> Telax Administrator
<input checked="" type="checkbox"/> Comp Bureau	<input checked="" type="checkbox"/> koray parmaks	<input checked="" type="checkbox"/> Regina Youngblood	<input checked="" type="checkbox"/> Tony Valdes
<input checked="" type="checkbox"/> Connie Galdame	<input checked="" type="checkbox"/> Michael Morelli	<input checked="" type="checkbox"/> Selda McMahan	

Upon opening this page users will see all existing **Offices** and clicking on an **Office** will allow users to see the agents assigned to each office.

To create a new **Office** users will click on the **Add** button at the top right of the page



Clicking on the **Add** button will create a new office with the name of New Office. Users will create the appropriate name for the **Office** by entering it in the **Selected Office:** field.

Selected Office:

Users will also see a list of all agents already configured in the Admin Portal. To select the agents to be added to the new **Office** a user will click in the box beside each name of the agents to be added.



Office Members:

<input type="checkbox"/> Agent A	<input type="checkbox"/> Demo User	<input type="checkbox"/> New Agent	<input checked="" type="checkbox"/> Steve Turton
<input checked="" type="checkbox"/> Agent B	<input type="checkbox"/> Don Butler	<input type="checkbox"/> New Agent	<input type="checkbox"/> Sue Saucedo
<input type="checkbox"/> Bryan Aust	<input type="checkbox"/> Doreen Birkholz	<input checked="" type="checkbox"/> New Agent	<input type="checkbox"/> Sue Saucedo
<input type="checkbox"/> C I	<input type="checkbox"/> Eric Gervais	<input type="checkbox"/> New Agent	<input type="checkbox"/> Telax Administrator
<input type="checkbox"/> Comp Bureau	<input type="checkbox"/> koray parmaks	<input type="checkbox"/> Regina Youngblood	<input type="checkbox"/> Tony Valdes
<input type="checkbox"/> Connie Galdame	<input type="checkbox"/> Michael Morelli	<input type="checkbox"/> Selda McMahan	

Once a user is certain that the correct agents are selected the **Update** button beside the **Selected Office** field must be clicked.

The new **Office** has been successfully created. Users will now see the new **Office** as an option in the **Agents** page.

Offices can easily be modified to add or remove agents, or change the office name. To modify an office, users click on the **Office** to be modified in the **Offices** list. The configuration for that office will be displayed. To add agents to the office click in the box beside their names so that a checkmark appears. To remove agents from the office, click in the box beside their names so that the checkmark is removed.

Users must click on the **Update** button beside the **Selected Office** field in order to changes to take.

Offices can easily be deleted from the Admin Portal. To delete an office users will click on the appropriate **Office** in the **Offices** list. The configuration for that office will be displayed. To delete, simply click on the **Delete** button.

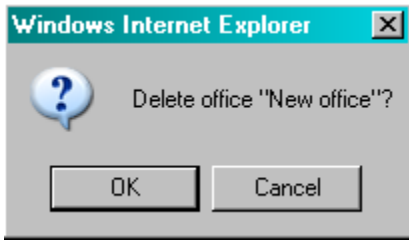
Before deleting the **Office** all agents must be disassociated from the office. If a user attempts to delete an **Office** with agents still associated the following error will show at the top of the page:

The office cannot be deleted because there is at least one agent associated to this office.

Offices: **Add** **Delete**

Main Office
Vancouver
Washington
Manila HQ
New York Branch Office
New office

In order to disassociate agents from one office, they must be re-assigned to another office. Once all agents are disassociated from the **Office** to be deleted users must click on **Update** to enable the change, then click on **Delete** again. Users will click **Ok** if positive that the office should be deleted.



The office has been successfully deleted.

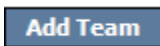
Agents

From this page, users will perform two important configuration tasks. The first task will be to create teams for agents who will share the same configuration settings. The second task will be to create individual agents. How a user defines the teams is based on the business requirements of their operation.

Team Configuration

The benefit of having a **Team** is that it allows users to set configurations that many agents will share. Without the ability to create a **Team**, each agent would have to be configured individually. This function is especially time-saving for large call centers with many agents who will have identical configurations.

To create a team, click on the **Add Team** button at the top left of the page.



The page will refresh and will show default entries for a new team.

Add Team
Add Agent

Find Agent

Find

- Default Team
- Telax Administrator
- System Administrator
- Demo User
- Reverse Ultra
- Beth Middleton
- Paul Dupuis
- robot dials
- New team**

Update
Delete

Team Information:

Name:

Scope: Office:

Not Set Timeout: On-Call Timeout: Wrapup Timeout: Break Timeout:

Initial Status: Automatically switch to Available Max. Chat Sessions:

Permissions:

<input checked="" type="checkbox"/> Access Call Centre Agent	<input type="checkbox"/> Access recordings
<input type="checkbox"/> Access Call Centre Monitor	<input type="checkbox"/> Change configuration settings
<input checked="" type="checkbox"/> Access Administration Site	<input checked="" type="checkbox"/> Change own password
<input type="checkbox"/> Access reports	<input type="checkbox"/> Change password for other agents

Team Skillsets:

Users will first enter the name for the new team in the **Name:** field.

The team scope will be configured next. The **Scope** determines the level of visibility that an agent or team will have. The **Scope** options in the drop-down menu are shown below.



The default setting is always None. This does not let the agent see any information other than his/her own.

Team scope will allow a user visibility to any agent on a their own team.

The Office scope will allow a user visibility to any agent in their own office.

The Global scope will allow a user visibility to all agents under that company ID.

Visibility is related foremost to what will be displayed on the Telax Call Center Monitor and it also determines the recordings and report results that an agent will have access to. Users must be aware that each **Scope** setting is relevant only to what each agent is assigned to. For example, an agent given the scope setting of Office, will only have access to the office they are assigned to. To be able to have visibility across different offices, that agent would need a **Scope** of Global. Likewise, for an agent to have visibility across different teams in one office, that agent would need the **Scope** of Office, or to see teams in different offices, that agent would need a Global **Scope**.

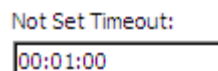
By setting the **Scope** when creating a team, every agent in that team will have the same **Scope** as the default when they are assigned to a team.

If multiple offices are in use, the user will then use the drop down menu to select the appropriate **Office** setting for the new team.



For a full description of the **Office** configuration, please see the **Offices** section of this manual.

Configuring the **Not Set Timeout** field will determine the length of time an agent will stay in the status **Not Set** before reverting to a status of **Available**.





Configuring the **On Call Timeout** field will determine the length of time an agent can be active on a call. At the time limit configured in the **On Call Timeout** the call will be terminated. This setting is usually left at a very high value and is a safeguard against calls that don't disconnect.

On-Call Timeout:

Configuring the **Wrapup Timeout** field will determine the length of time an agent can be in the **Wrapup** status before reverting to a status of **Available**.

Wrapup Timeout:

Configuring the **Break Timeout** field will determine the length of time an agent can be in the **Busy – On Break** status before the Call Center Monitor will show that agent's status in bold and red, indicating that they are over the prescribed limit.

Break Timeout:

The **Initial In Call Status** configures the status agents will be in when they initially log in to the CCA. This setting can be configured using the drop-down menu. The default is to be in the **Not Set** status when agents log in.

Initial in-call Status:

- Not Set
- Available
- Accept Internal Calls
- Busy - On Break
- Busy - Other

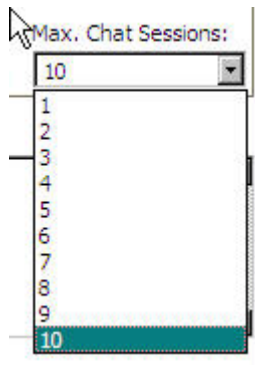
Beside the Initial In-Call Status dropdown is a box titled **Automatically Switch To Available**.

 Automatically switch to Available

By clicking on this box and having a checkmark appear, agents will switch to available following the settings configured in the **Not Set Timeout** field. This only applies if the **Initial In-Call Status** is set to **Not Set**.

 Automatically switch to Available

Configuring the **Max. Chat Sessions** field, users will set the number of active customer chat windows an agent can have open at any one time. The drop-down menu allows for the selection of one to ten chat sessions.



The **Permissions** configuration allows users to determine what functions each team will perform. The **Permissions** configurable settings are standard, based on the functionality of the Telax IVR and supporting systems.

Permissions:

<input checked="" type="checkbox"/> Access Call Centre Agent	<input type="checkbox"/> Access recordings
<input type="checkbox"/> Access Call Centre Monitor	<input type="checkbox"/> Change configuration settings
<input checked="" type="checkbox"/> Access Administration Site	<input checked="" type="checkbox"/> Change own password
<input type="checkbox"/> Access reports	<input type="checkbox"/> Change password for other agents

If a **Permissions** setting has a checkmark in the box to the left of the setting is active. If a **Permissions** setting is blank in the box to the left of the setting the setting is inactive.

Access Call Center Agent - this setting determines if a user will have access to log in to the Telax Call Center Agent application

Access Call Center Monitor – this setting determines if a user will have access to log in to the Telax Call Center Monitor

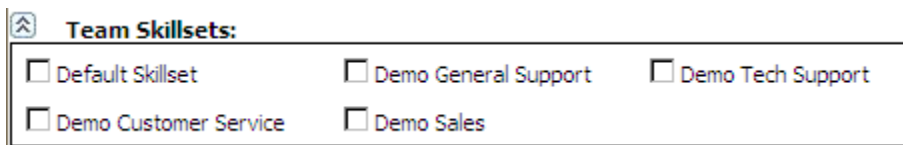
Access Administration Site – his setting determines if a user will have access to log in to the Telax Admin Portal

Access Reports – this setting determines if a user will have access to run reports in the Telax Admin Portal

Access Recordings – this setting determines if a user will have access to call recordings in the Telax Admin Portal

Change Configuration Settings – this setting determines if a user will have the ability to change configuration settings in the Telax Admin Portal. Enabling Change Configuration Settings will give users the ability to see and access the Configuration menu. Disabling Change Configuration Settings will give users access to only the Support and Download pages. Users who have Access Reports and/or Access Recordings enabled and Change Configuration Settings disabled will only have access to Reports, Recordings, Support and Download pages.

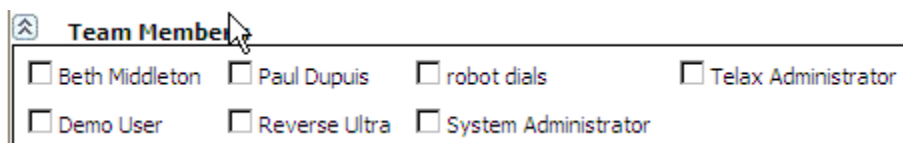
Team Skillsets allows users to configure which pre-configured Skillsets each team will have.



Default Skillset Demo General Support Demo Tech Support
 Demo Customer Service Demo Sales

A checkmark in the box to the left of a Skillset indicates that the team will operate with that skillset. An empty box to the left of a Skillset indicates that the team will not operate with that skillset.

Team Members allows users to configure which pre-configured agents will work within each team created.



Beth Middleton Paul Dupuis robot dials Telax Administrator
 Demo User Reverse Ultra System Administrator

A checkmark in the box to the left of a Team Member name indicates that agent will be a part of the **Team** configurations being created. An empty box to the left of a Team Member indicates that agent will not be a part of the **Team** configurations being created.

*Note: For changes to be saved, the **Updated** button at the top of the page must be clicked. Navigating away from the **Team** page without updating will lose all the configurations.*

If users ever need to make a **Team** inactive, all agents must be assigned to another team before the team can be deleted. If a user tries to delete a team with users still assigned an error indicating that the **Team** cannot be deleted will appear at the top of the page.

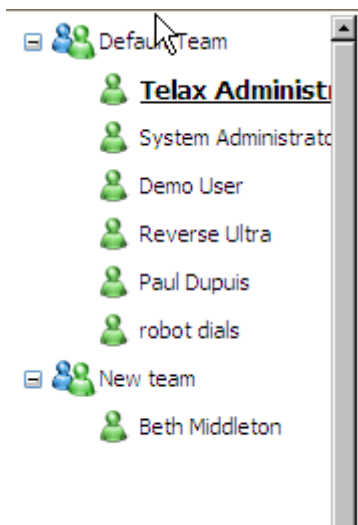
Operation could not be completed, the team is either in use, or it cannot be deleted.

Agent Configuration

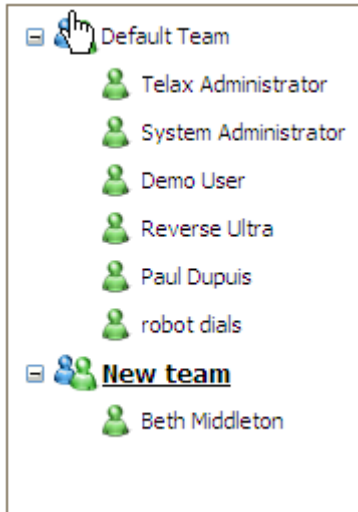
For every user that will be working with the Telax systems, they will need to have a profile created in the Admin Portal.

If **Teams** have already been created for agents to be assigned, there is not much configuration to do for new agents.

To create a **New Agent** profile, users must ensure that the appropriate **Team** is selected before creating the **New Agent** profile. To select the appropriate **Team**, click on that **Team** in the left pane of the screen.



In the above example, no **Team** has been selected, so any new agent will be created in the first **Team** in the list by default.

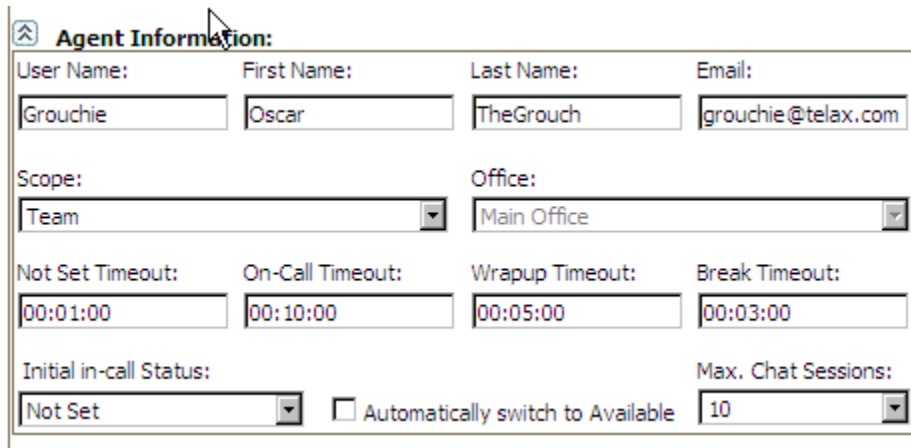


In this example, the **New Team** is selected, so any new profile we create will be added to the **New Team**.

Once the appropriate **Team** is selected, users will click on the **Add Agent** button at the top right of the window to begin creating a new profile.



Users will now add the individual agent information to the profile.

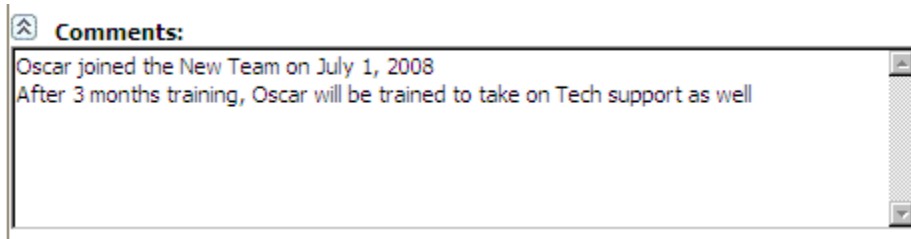


Agent Information:			
User Name:	First Name:	Last Name:	Email:
Grouchie	Oscar	TheGrouch	grouchie@telax.com
Scope:	Office:		
Team	Main Office		
Not Set Timeout:	On-Call Timeout:	Wrapup Timeout:	Break Timeout:
00:01:00	00:10:00	00:05:00	00:03:00
Initial in-call Status:	<input type="checkbox"/> Automatically switch to Available		Max. Chat Sessions:
Not Set			10

*Note: It is advised that users click the **Update** button to save work frequently. If the work is not saved and a user navigates away from the current screen, all work will be lost.*

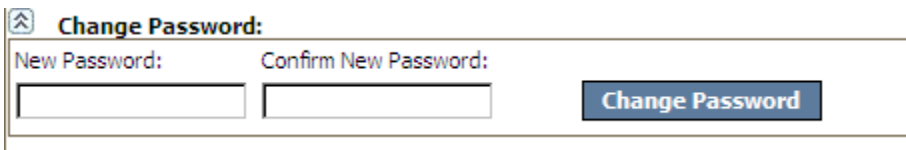
When an agent is set up, the profile automatically takes on the settings of the team it is created in. Any changes a user makes to an agent profile that are different than the team settings will have precedence over the team configuration. Any new agent profile will automatically have the settings of the team it is associated with.

The **Comments** section is a free-form text field that allows users to add notes specific to each agent. Comments can include any information that other administrators may need about an agent.



Each agent profile will have a personal **Password** that must be entered for an agent to log on to either the Call Center Application, Call Center Monitor or the Admin Portal. The username and **Password** created in the agent profile will be used for all three applications as permissions are granted.

To create a **Password** simply key in the alpha, numeric or alpha-numeric code that will become that agent's **password**. The new **password** must be entered twice and cannot be longer than 8 characters in length. The username will not be case sensitive, but the **password is case sensitive**. Once the new **password** has been keyed in twice, click on the **Change Password** button and the new password will take effect immediately.



Note: If a new agent login does not work the first time the agent tries, double check that the password is 8 characters long or less. Also check the capitalization of the password. Usernames are not case sensitive, but passwords are case sensitive.

Note: If an agent password is changed while the agent is logged in, they will be required to use the new password the next time they log in to the system. Changing an agent password will not affect their current session.

Individual Permissions is the configuration settings for determining what areas of the Telax systems agent profiles will be granted access.

Individual Permissions:

<input checked="" type="checkbox"/> Access Call Centre Agent	<input type="checkbox"/> Access recordings
<input type="checkbox"/> Access Call Centre Monitor	<input type="checkbox"/> Change configuration settings
<input checked="" type="checkbox"/> Access Administration Site	<input checked="" type="checkbox"/> Change own password
<input type="checkbox"/> Access reports	<input type="checkbox"/> Change password for other agents

These configuration settings are set to the Team settings by default. Users can grant or deny access on an individual profile basis as required. A checkmark in the box to the left of a configurable item indicates that permission is granted. A blank box to the left of a configurable item indicates that permission is denied.

Individual Skills allows users to set an individual agent’s skillsets to a configuration different than those defined at the team level.

Individual Skills:


	Priority
<input type="checkbox"/> Customer Service	10 (Lowest)
<input type="checkbox"/> Sales	10 (Lowest)
<input type="checkbox"/> Technical Support	10 (Lowest)

These configuration settings are set to the Team settings by default. Users can alter the queues or priorities on an individual profile basis as required. A checkmark in the box to the left of a queue name indicates an agent will receive calls from that queue when logged in. If the box to the left of the queue name is empty the agent will not receive calls from that queue while logged in. Adjusting the priority at the agent level will send calls from different queues at different priorities to that agent only.

For example there is an agent on a team who will be assisting with Quality Assurance activities, that agent may need to have access to the recordings for their team, but other team members will not require that access. The team default would be set to deny access to recordings. By setting the individual agent’s permissions to allow access to recordings, that agent will be able to search and listen to all the recordings for their team. Likewise if there is an agent who is stronger at Technical Support, setting the Technical Support queue priority level for that agent to 2 while the priority for the Customer Service and Sales queues are at priority 5, that agent will always receive Technical Support calls before Customer Service or Sales calls, but the rest of the team will receive calls as defined at the team level.

Busy Reasons

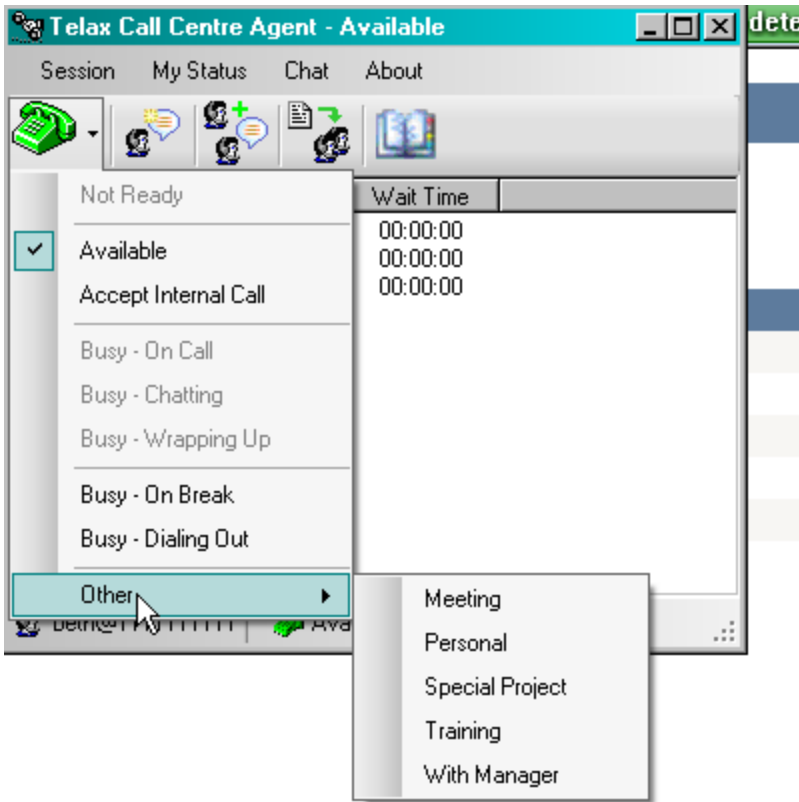
From this page users will be able to create and manage the **Busy Reasons** the agents can choose when changing status in the Call Center Application. Because the reasons why agents may be required to be away from the live calls are as varied as the types of business in a call center, the busy reasons are completely configurable in the Telax Admin Portal.

Additional Busy Reasons:  [Add Reason](#)

Reason
Edit Delete Meeting
Edit Delete Personal
Edit Delete Special Project
Edit Delete Training
Edit Delete With Manager

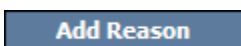
Upon navigation to the **Busy Reasons** page users will see those **Busy Reasons** already configured in the system.

If we look at the Call Center Agent Application, the configurable **Busy Reasons** are accessed by opening the **Status** menu or using the phone icon to access status. Users will see two pre-configured status options; **Busy - On Break**; and **Busy - Dialing Out**. These two status options are not configurable. **Busy - On Break** is the default lunch/break status. **Busy - Dialing Out** is the status selection that allows agents to make an outbound call. The status options that users can configure are in the **Other** menu.

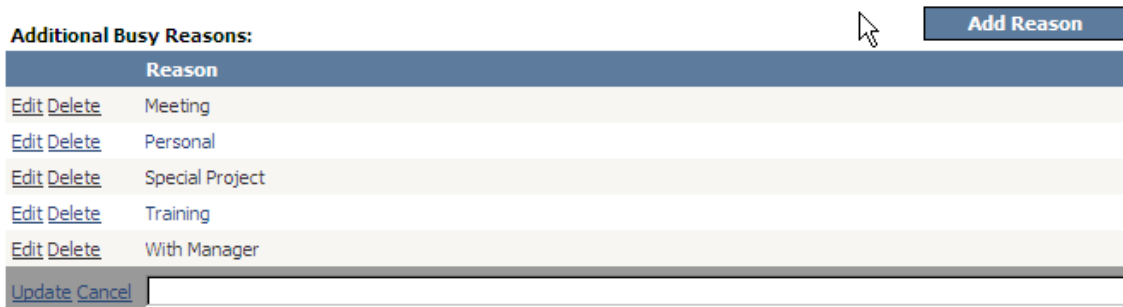


Best Practice Hint: keeping the number of status options as small as possible will make it easier for agents to select the correct status option quickly and accurately.

To create a new **Busy Reason** click on the **Add Reason** button at the top right of the page.



Users will see a new entry at the bottom of the list of existing **Busy Reasons**.

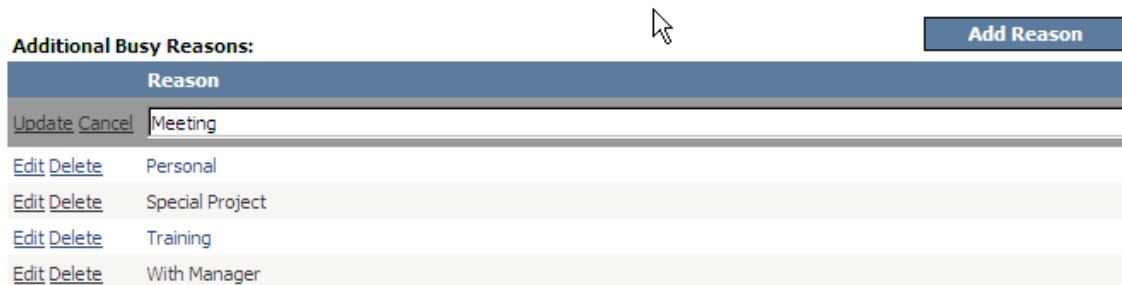




Users simply enter the name of the new **Busy Reason** and click on **Update** to the left of the new reason.

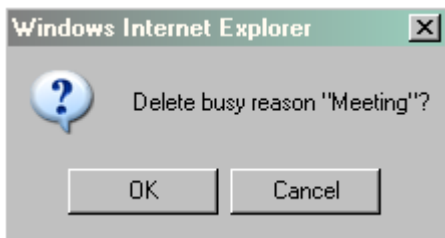
Agents will see this new option the next time they log in and it will appear on the **Agent Status Trace** reports the first time an agent selects it.

To **Update** an existing reason, click on the **Edit** link to the left of the reason. The field will become live and the **Busy Reason** can be re-named. Users must click the **Update** link to the left of the reason for the changes to take effect.



Agents will see the changed option the next time they log in and it will appear on the **Agent Status Trace** reports the first time an agent selects it.

To **Delete** an existing reason, click on the **Delete** link to the left of the reason. A warning window will pop.



If the reason is to be deleted, click on **OK**. If users are unsure about deleting a busy reason, click on **Cancel** to terminate the transaction and keep the busy reason.

If **OK** is clicked, the reason is removed from the list of available reasons and agents will no longer be able to select it the next time they log in. It will no longer appear in the **Agent Status Report**.



Bulletins

The **Bulletin** feature is designed as an emergency messaging feature for Telax IVRs. **Bulletins** are intended to be short-term information delivery messages that will tell callers of a known service outage, unexpected office closure due to bad weather, or any other information a caller may need.

Bulletin messages are intended to keep unnecessary traffic from reaching the queues.

An example of a **Bulletin** in use would be an ISP that is aware of, and working on an outage in the Des Moines area. That ISP would activate a bulletin that would play at the top of the IVR, informing customers that there is a known service outage in the Des Moines area and the estimated time of service return. Callers calling in about the outage would be assured that their problem is being looked after and exit the IVR before going to the queues. Callers with other issues would be able to continue on to the queues to have their questions answered. Once the Des Moines outage was corrected, the **Bulletin** would be turned off and the IVR's regular messaging would resume uninterrupted.

Another example of a **Bulletin** in use would be an office that was closed due to a weather advisory. Users would be able to play a **Bulletin** that advises callers of the office closure due to the pending and/or occurring weather event. In the situation where there are no agents available to take the calls, the IVR can be programmed by users to either capture caller voicemails for later return calls and then de-queue the caller, or to simply de-queue the caller. De-queuing refers to terminating the call – or hanging up the call.

The individual **Bulletin** messages are pre-recorded and stored for future use. An IT company may pre-record messages intended to tell callers that a server is down, Exchange is down for maintenance etc. Then when a situation comes up, the messages are available for immediate use.

The same as regular IVR prompts, **Bulletins** are recorded by the users and published by Telax. When a new **Bulletin** is recorded, your Telax Project Manager or Customer Service must be notified to publish the new **Bulletin**.

When a user navigates to the **Bulletins** page all the existing/available **Bulletin** messages will be shown.

Update

Code	Description	Terminate Call	Allow Voicemail
901	IManage Issue	No	No
902	Outlook Issue	No	No
903	Network Issue	No	No
904	Server Issue	No	No
905	Bulletin 05	Yes	Yes
906	Bulletin 06	Yes	Yes
907	Bulletin 07	Yes	Yes
908	Bulletin 08	Yes	Yes
909	Bulletin 09	Yes	Yes
910	Bulletin 10	Yes	Yes

When the IVRs are built, each system is automatically configured with 10 available **Bulletin** messages. Once a message is recorded, users should give the **Bulletin** a unique name that clearly identifies the message for others who may need to use it.

The name of a **Bulletin** can be changed simply by typing over whatever is already in the **Description** field.

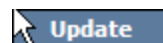
There are two options for each **Bulletin**; **Terminate Call** and **Allow Voicemail**. Users need to be aware of these settings as they determine what will happen after a **Bulletin** is played to a caller.

By using the dropdown menu users can select either the **Yes** or **No** options.

A **Yes** setting in the **Terminate Call** column indicates that once the **Bulletin** is played, the IVR will hang up – or terminate the call. A **No** setting in the **Terminate Call** column indicates that callers will be allowed to continue on in to the IVR and hold for live agents as usual.

A **Yes** setting in the **Allow Voicemail** column indicates that once the **Bulletin** is played, the IVR will direct callers to leave a message for return later and then the call will be terminated. A **No** setting in the **Allow Voicemail** column indicates that callers will be allowed to continue on in to the IVR and hold for live agents as usual.

For any changes to the Bulletins to be saved the **Update** button at the top right of the page must be clicked before navigating away from the page.



Users must be aware that Bulletins are not yet live on the IVR. Please proceed to the [IVRs Page](#) for further instruction.

IVRs

From this page users will activate previously configured bulletin messages to play for callers, re-name IVRs and if required advanced settings allowing for refinement of hours of operations, and call forwarding.

Hosted IVRs:			Update
IVR Name	Active Bulletin	Notes	
TelaxDemo 2	None		Advanced Settings

Users will see all the system IVRs listed on this page. For each IVR listed, users can change the IVR name simply by typing over the existing name and clicking the **Update** button. This change will be reflected in the Call Center Monitor, the Call Center Agent, the Admin portal and all reports with the IVR name as a field.

To activate **Bulletins** users will see a list of all available bulletin messages in the **Active Bulletin** drop-down menu.

Active Bulletin

None

- None
- iManage Issue
- Outlook Issue
- Network Issue
- Server Issue
- Bulletin 05
- Bulletin 06
- Bulletin 07
- Bulletin 08
- Bulletin 09
- Bulletin 10

Click on the appropriate bulletin to activate it and click on the **Update** button.

*Note: Changed settings will not be activated if users do not click on the **Update** button.*

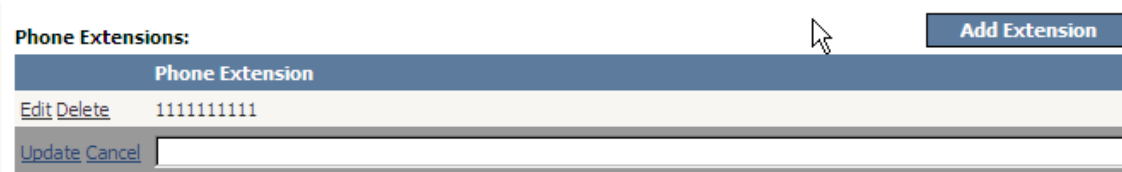
Phone Extensions

From this page, users will configure static phone extensions for Call Center Agent users.



As a general rule, Telax **does not** recommend using this feature as it restricts the ability of agents to log-in with any extension. By creating a list of extensions on this page, users are limited to logging in only with the configured **Phone Extensions**.

To add an extension, click on the **Add Extension** button and a new extension field will open.



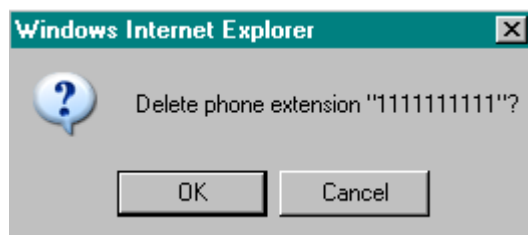
To create the new extension entry type in the new 10 digit DID and click the **Update** link to the left of the field.

To change an extension click on the **Edit** link to the left of the extension to be changed. Enter a new extension by typing over the existing one. Click on the **Update** link to the left of the extension entry.



To delete an extension, click on the **Delete** link to the left of the appropriate extension entry.

If the extension is to be deleted click on **OK** when the warning appears. Click **Cancel** if the extension is to stay in the list.



Virtual Extensions

From this page, users will be able to add, delete or modify **Virtual Extensions** if that feature is created in an IVR. This function also allows users to add, delete or modify entries that are available to agents in the **Phonebook** feature of the Call Center Agent application.

Virtual Extensions are created when a program requires agents to have a direct touch-point for callers. **Virtual Extensions** are created in the IVR for callers to reach a specific person. For example, Shelly at Widgets Inc. is the direct contact for people who need information on widget A. In the IVR design, Shelly has been given extension 501. People calling in to the Widgets Inc. IVR will hear an option to enter the extension of the person they wish to reach. Anyone who needs Shelly will enter extension 501 and be connected directly to Shelly instead of going to the general queue. **Virtual Extensions** is one way in which a Telax IVR can provide the functionality of a traditional PBX.

Virtual Phone Extensions:						Add Extension
	Extension	DID	User Name	Title	Mailbox	
Edit Delete	5011	9729255011	Shirley Boss	Exec Dir- Central/Principal Staffing	sboss@dallasisd.org	
Edit Delete	5088	9729255088	Natalie Daniels	Substitute Custodians- Central/Principal Staffing	ndaniels@dallasisd.org	
Edit Delete	5096	9729255096	Johnnie Cosper	Staffing Spec - Central Staff- Central/Principal Staffing	cosper@dallasisd.org	
Edit Delete	5098	9729255098	Jennifer Ontiveros	Spec - Central Staff- Central/Principal Staffing	jontiveros@dallasisd.org	

To **Add** a new entry to the **Virtual Extensions** users will click on the **Add Extension** button. A new entry field will open.

Virtual Phone Extensions:						Add Extension
	Extension	DID	User Name	Title	Mailbox	
Update Cancel	[New Ext]	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Edit Delete	3592	9729253592	Beverly Franzen	Benefits Outlook/DYS Prog Mgr- Benefits	bfranz-c@dallasisd.org	

Fill in the appropriate information in each field.



Once the appropriate information is entered, click on the **Update** link to the left of the entry.

To **Edit** an existing entry, click on the **Edit** link beside the appropriate entry. The fields for that entry will become live and information can be changed by typing over the existing information.

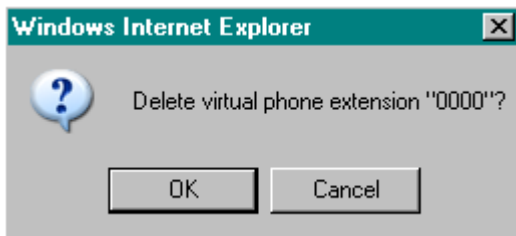
Virtual Phone Extensions: **Add Extension**

	<u>Extension</u>	<u>DID</u>	<u>User Name</u>	<u>Title</u>	<u>Mailbox</u>	
Update Cancel	0000	4162070112	Oscar The Gro		Sanitation	oscar@telax.com

Once the information is revised, click on the **Update** link to the left of the entry.

To **Delete** an existing entry click on the **Delete** link to the left of the appropriate entry.

If the entry is to be deleted click on **OK** when the warning box appears. If the entry was selected in error, click on **Cancel**.





Personalized DIDs

The **Personalized DIDs** page is where users will manage configurations for virtual DIDs. This functionality allows a user to have a ten digit phone number that will be directed to any location the user logs in to the Telax Call Center Agent application.

This is useful if a user needs to publish a direct line for customers, but will be frequently changing seats in a call center environment.

For more information on how this feature can be designed and implemented, please speak to your Account Rep or Project Manager.

Unless this feature is enabled as part of an overall IVR design, there will be nothing visible on this page.

Call Tracking

From this page users will configure the **call classification** activities that agents will be required to complete at the end of a call.

Call Classification allows users to track metrics on the reasons for calls, the caller types and the results of the call. **Call Classification** is configured separately for inbound and outbound calls allowing for more accurate records.

Inbound Call Tracking:

General
Call Subjects
Caller Types

Tracking Mode:

Disabled

Optional (no warning message)

Optional (show warning message)

Mandatory

Classification Options:

Caller type selection is optional Call subject selection is optional

Caller type selection is mandatory Call subject selection is mandatory

The **Tracking Mode** determines how the call classifications will be presented to the agents at the end of a call.

Disabled – agents will not be able to classify calls. The feature is ‘turned off’.

Optional (no warning message) – agents will be able to manually invoke call classification, but will receive no instructions to do so on their screen.

Optional (show warning message) – agents will be able to manually invoke call classification and will have a reminder warning pop on their screen at the end of each call

Mandatory – agents will be forced to classify each call. They will not be able to move to the next call until the current call is classified.

The **Classification Options** determine the level of detail required when classifying each call. Users will have the option to create **Caller Type, Subject, and Sub-subjects** which are dependent on the **Subject**. Users may feel that the caller type is a critical piece of information for their operation and absolutely necessary, but the subject and sub-subject are not as critical and not applicable to every caller. This is the reason that users get the flexibility to create the call tracking configurations down to this amount of granularity.

Users are given the ability to create their own classifications. The system does not have standard defaulting so that it is completely customized to each specific need.

To create a new **Call Subject** click on the **Call Subject** tab.

Inbound Call Tracking:

I

General **Call Subjects** Caller Types

[Add](#)

Call Subject	Notes Required
Edit Delete 0 Transfer to SDT	<input type="checkbox"/>
Edit Delete 1 Transfer to other	<input type="checkbox"/>
Edit Delete 2 Benefit Payment Enquiry	<input type="checkbox"/>
Edit Delete 3 Claim Status	<input type="checkbox"/>
Edit Delete 4 Revenue- Clearance	<input type="checkbox"/>
Edit Delete 5 Revenue- Other	<input type="checkbox"/>
Edit Delete 6 Health Care Inquiries	<input type="checkbox"/>
Edit Delete 7 LRI -Transfer	<input type="checkbox"/>
Edit Delete 8 LRI -Resolved	<input type="checkbox"/>
Edit Delete 9 Other - Type in response	<input type="checkbox"/>

To create a new **Call Subject** click on the **Add** button.

General **Call Subjects** Caller Types

[Add](#)

Call Subject	Notes Required
<input type="text" value="[New subject]"/> Update Cancel	<input type="checkbox"/>
Sub-subjects: No sub-subject has been configured <div style="text-align: right;">Add</div>	
Edit Delete 0 Transfer to SDT	<input type="checkbox"/>
Edit Delete 1 Transfer to other	<input type="checkbox"/>
Edit Delete 2 Benefit Payment Enquiry	<input type="checkbox"/>

Enter the name of new call subject and click on the **Update** link to the left of the field.

If users want a **Sub-Subject** layer under the **Subject** layer, click on the **Add** button in the gray area.

This will open a new section to the dialog box allowing for the creation of the **Sub-Subject**.

Enter the name of the **Sub-Subject** and click on the **Update** link to the left of the field.

Sub-Subjects are dependent on their **Subject** and users should have their decision tree planned out accordingly. A **Sub-Subject** entered under Subject One, would not be available under Subject Two unless it was created as a sub-subject under both different entries.

To enter multiple **Sub-Subjects** select the appropriate subject from the list and click on the **Edit** link beside the list entry.

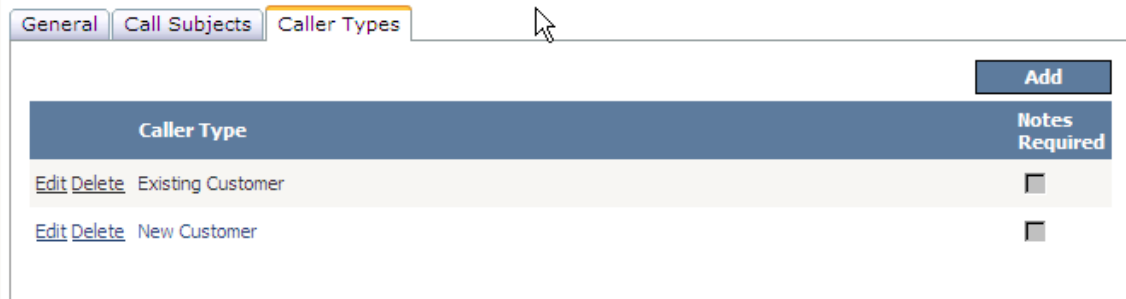
Click on the add button in the gray area to create a new sub-subject, enter the information and click on the update link.

Note: From the edit function, users can create multiple sub-subjects and only click update when the list is complete.

Call Subject list entries can be removed from the Agent Application by clicking on the **Delete** link beside any list entry.

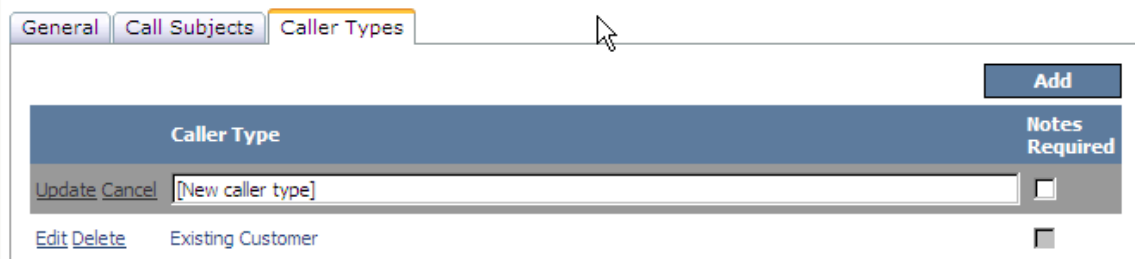
By clicking on the **Notes Required** button in the top right of the call subject dialog box, users of the Agent Application will be required to enter free-form text notes about the call. If there is no check in that box, leaving notes will be optional for users.

To configure **Caller Types**, click on the **Caller Types** tab.



To add a new **Caller Type** click on the **Add** button.

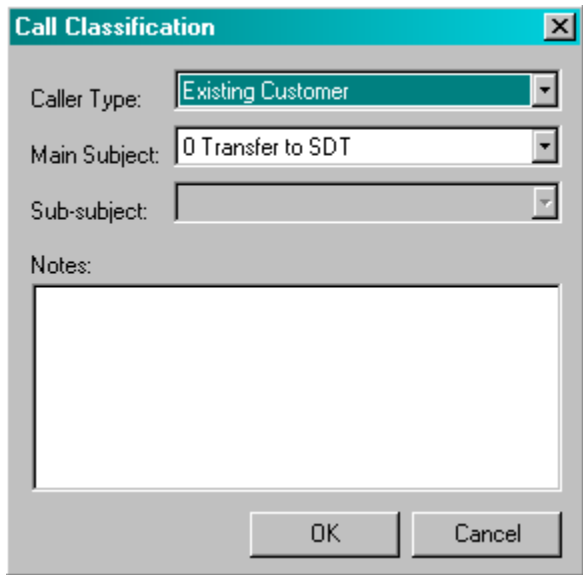
A new field will appear in gray.



Enter the new **Caller Type** name and click on the **Update** link to the left of the field.

The same instructions and rules apply to both Inbound and Outbound calls.

Configurations managed from the **Call Tracking** page will appear in the Call Center Agent application. When an agent finishes a call a **Call Classification** window will pop, prompting the agent to select the appropriate entries.



The image shows a 'Call Classification' dialog box with a teal title bar and a close button (X) in the top right corner. It contains three dropdown menus: 'Caller Type' with 'Existing Customer' selected, 'Main Subject' with '0 Transfer to SDT' selected, and 'Sub-subject' which is currently empty. Below these is a 'Notes:' label and a large empty text area. At the bottom are 'OK' and 'Cancel' buttons.

These agent selections are then captured and available in reports. This information is very important for understanding where callers are from, what topics they need to talk about and how easily agents can resolve issues.



SWAT Service

The SWAT Service is designed as an emergency message broadcast system. This feature is meant to be part of a company's overall disaster recovery plan. The SWAT Service has the ability to send voice messages to telephone as well as e-mail.

SWAT service is pre-configured with employee lists and the broadcast messages can be recorded and delivered from a remote location whenever required.

If users are interested in setting up the SWAT Service as part of their Disaster Recovery program, please contact your Account Manager.

Manage Sessions

The **Manage Sessions** page has two key functions:

Blind Agent Login Active Sessions

⊞ **Blind Agent Logon**
↔

User Name:

Phone Extension:

No session is currently active

Blind Agent Login

Blind Agent Login is designed as a disaster recovery option if users cannot log in to their usual work computer for any reason. With the **Blind Agent Login** users can be logged in at any phone by a remote administrator. This is an important feature if users are unable to enter the office and do not have internet connectivity remotely. They can be logged in so that business calls will be routed to the phone the user has access to. The agent will not have the CCA without internet connectivity, but will be able to field calls and keep the business in contact with customers.

To activate a **Blind Agent Login** use the **User Name:** dropdown menu to select the appropriate users to log in.

⊞ **Blind Agent Logon**

User Name:

- Beth
- Demo
- Grouchie
- Paul
- Reverse
- Robert
- robot
- Administrator
- Telaxadmin
- trial21

Phone Extension:

Click on the name of the user to log in. Enter the 10 digit phone number the user will be taking calls at.

Blind Agent Logon

User Name: Phone Extension:

Active Sessions

No session is currently active

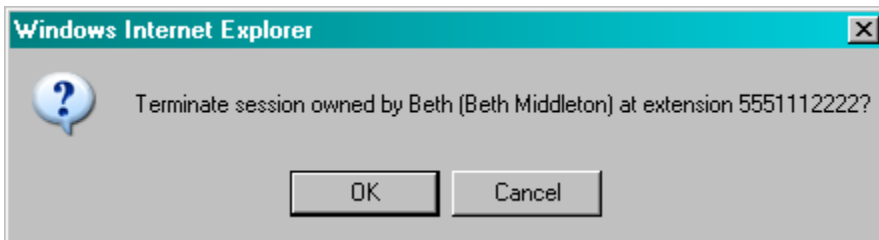
Click on the **Log On** button to the right. The user will begin receiving calls at the extension entered.

Active Sessions

Active Sessions lists the users currently logged in.

Owner	Phone Ext.	Start Date	Last Access	Session Duration	In-call Status
Terminate Beth (Beth Middleton)	5551112222	Sep 16 11:07 AM	Sep 16 11:08 AM	00:00:29	Available (00:00:02)

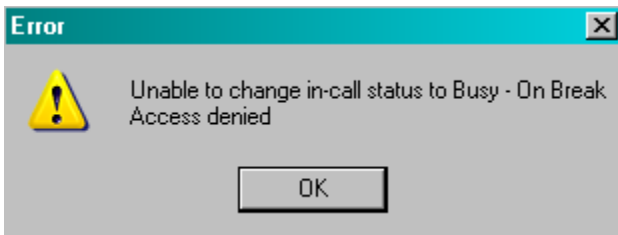
Users can force a user session to be terminated using this function. To terminate a session click on the **Terminate** link beside the user name.



Confirm that you want to terminate the session by clicking on **OK** or cease the action by clicking on **Cancel**. Calls will immediately cease delivery to that user.

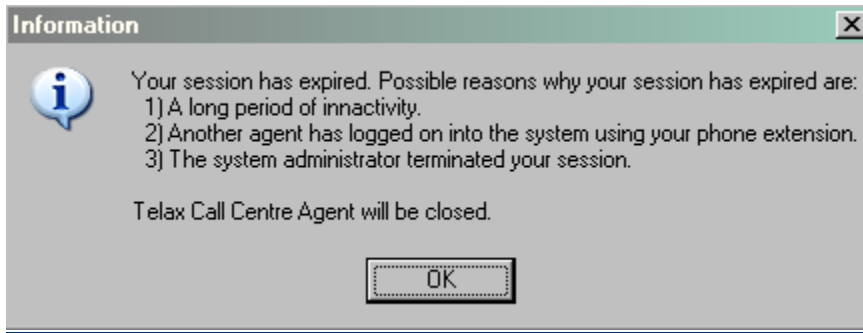
The user will see no difference on their display if they are logged in to the CCA.

However, if the user tries to manipulate their CCA in any way they will encounter an error.





When the user clicks on **OK** a new message appears.



At that point the user's CCA session will close.



Monitoring

From the **Monitoring** page users will be able to see a top-level view of how their call center is performing at any given time.

Users will need to set the base parameters for monitoring.

Desired Maximum Waiting Time:

Calls should not be waiting in queue more than seconds.

Desired Performance:

Excellent: % of calls are transferred within the Desired Maximum Waiting Time.

Acceptable: % of calls are transferred within the Desired Maximum Waiting Time.

Poor: below the acceptable level

Once the parameters are set using the drop-down menus, click on **Start Monitoring**.

*Note: The **Monitoring** page in the Telax Admin Portal is only intended to be a high-level quick-information view. For complete monitoring capabilities users will use the Call Center Monitor Application (CCM).*

Call Centre Status at Sep 16, 2008 11:37 AM (local time)

Statistics

Queue Name	Received	Answered	Abandoned	Transfer Rate	Serv. Level
------------	----------	----------	-----------	---------------	-------------

Realtime Queues Status

Queue Name	Calls	Max. Wait Time
Customer Service	0	00:00:00
Sales	0	00:00:00
Technical Support	0	00:00:00
	0	00:00:00

Realtime Agents Status

Agent Name	Phone Ext.	Status	Duration	Log Time	Answered	Missed
------------	------------	--------	----------	----------	----------	--------

The **Monitoring** view shows users statistics for each queue.

Received = number of calls to the queue

Answered = number of calls fielded by a user

Abandoned = number of callers who dropped out of queue before the call is answered

Transfer Rate = %age of calls answered vs. abandoned.

Service Level = %age of calls answered within the Desired Waiting Time

The **Monitoring** view shows the number of calls in queue and their longest wait tim.

The **Monitoring** view shows **Status** information for each user logged in.

Agent Name = username

Phone Ext. = phone user logged in at

Status = current user status (available, on call, on break, etc.)

Duration = the time a user has been in their current status

Log Time = total login time for that user's current session

Answered = total calls answered by user

Missed = total number of calls that were delivered to a user, but not answered



Reports

The **Reports** page is where users will run all the reports that will deliver information on the performance of the call center, IVRs, queues and users.

There are 37 reports templates that users can access to display pertinent information about their operation.

Reports can be viewed in the Telax Admin Portal, exported as a PDF document, exported as an Excel document or have the raw data exported to Excel.

Users who will be utilizing **Reporting** for their facility will be given a separate training session on the metrics collected by each report, the best statistics to follow for their purposes and how to configure the report parameters.

For more information on **Reports** please contact your Account Manager.

My Reports

Once a user has configured and run a report it will be stored in the **My Reports** page for 7 days for easy repeat retrieval.



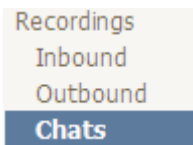
Recordings

From the **Recordings** page, users can search for and listen to calls made or received through the Telax CCA.

A key feature of any Telax IVR is the automatic recording of all calls and their easy retrieval for quality and training purposes.

All recordings are available for retrieval for 30 days from the Telax Admin Portal. Users who wish access to their recordings for longer periods of time can arrange to have the recordings delivered for storage on their own site or in Telax-hosted storage.

Searching for recordings is categorized by **inbound** and **outbound** calls and **chats**.



To begin searching for calls, select the appropriate call type and the search configuration page will open.

Please enter the search criteria:

From: (mm/dd/yyyy hh:mm:ss)

To: (mm/dd/yyyy hh:mm:ss)

Caller Id (ANI):

Number Dialed (DNIS):

Caller Type:

Call Subject:

Team(s):

Default Team
 New team

Agent(s):

Demo Administrator
 Paul Telaxadmin
 Reverse trial21
 Robert Beth
 robot Grouchie

Users searching for both inbound and outbound calls will define the following search criteria:

- From:** = Beginning Date – required
- To:** = Ending Date – required
- Call ID (ANI):** = number call came from – optional
- Number Dialed:** = inbound number dialed by caller – optional
- Caller Type:** = call classification Caller Type – optional
- Call Subject:** = call classification Call Subject – optional
- Teams:** = select/deselect available teams – at least one team required
- Agents:** = select/deselect available agents – at least one agent required

Users searching for chats will define the following search criteria:

- From:** = Beginning Date – required
- To:** = Ending Date – required
- Keywords:** = specific words used in the chat
- Teams:** = select/deselect available teams – at least one team required
- Agents:** = select/deselect available agents – at least one agent required



Once a user has defined the search criteria click the **Search** button. The calls or chats meeting the defined criteria will be displayed for review. Recordings are .wav files and chats are .txt files.

66 recordings were found

Call Date	Duration	Caller Id	Queue	Agent	Phone Ext.
03/26/2008 08:42AM	00:00:29	4162070112	Customer Service	Demo User	4169925668
03/26/2008 08:44AM	00:03:30	4162070112	Customer Service	Demo User	4169925668
03/26/2008 09:18AM	00:00:00	4163443376		Demo User	4169925668
03/26/2008 09:47AM	00:01:11	6479997204	Customer Service	Demo User	4169925668
03/26/2008 09:49AM	00:00:42	6479997204	Customer Service	Demo User	4169925668
03/26/2008 09:51AM	00:02:20	6479997204	Customer Service	Demo User	4169925668
03/26/2008 10:16AM	00:00:22	4163420195	Customer Service	Demo User	4169925668
03/26/2008 10:18AM	00:00:04	4163420195	Customer Service	Demo User	4169925668
03/26/2008 10:20AM	00:00:10	4163420195	Customer Service	Demo User	4169925668
03/26/2008 12:40PM	00:00:07	4163420195	Technical Support	Demo User	4169925668
03/26/2008 12:41PM	00:00:03	4163420195	Technical Support	Demo User	4169925668
03/26/2008 12:42PM	00:00:09	4163420195	Technical Support	Demo User	4169925668
03/26/2008 12:43PM	00:00:13	4163420195	Technical Support	Demo User	4169925668
03/26/2008 12:44PM	00:00:16	4163420195	Technical Support	Demo User	4169925668
03/26/2008 12:49PM	00:00:06	4163420195	Sales	Demo User	4169925668
04/02/2008 04:51PM	00:01:05	4169925668	Technical Support	Demo User	6139484251
04/07/2008 12:50PM	00:00:09	9052708065	Technical Support	Telax Administrator	9998710006

To listen to a recording or read a chat record, click on the date/time link to the left of the record.

To be able to listen to recordings the user will need to have headphones or speakers properly installed on the PC being used. There will also need to be a functional audio player (E.g. Windows Media Player, Quicktime, Nero Player) installed and configured on the PC.

To read chats, the conversations will open using Wordpad.

Users will also be able to save individual recordings from this page.



Download

From the **Download** page users will be able to download and install the latest version of both the CCA and CCM programs.

Please click on the appropriate link below in order to download the latest version of our client software.



[Download version 9.0.3.1061 of Call Centre Agent](#)

Please be advised that build this new version of CCA requires read/write access to the following keys within the windows registry:

HKEY_LOCAL_MACHINE\SOFTWARE\Telax Systems\CCA
HKEY_CURRENT_USER\Software\Telax Systems\CCA

[Download version 9.0.0.1132 of Call Centre Monitor](#)

To begin the download simply click on the appropriate link. The program will be available for direct loading or can be saved to the PC.

Follow the installation instructions on the screen to complete installation.

Note: The application serial number will always be the same as the CompanyID.




Detailed loading instructions are available from your Account Manager.

Support

Telax Technical Support is available 24/7/365.

Telax Technical Support can be reached by phone, e-mail and chat. The contact information is available for users from the **Support** page.

You can contact us:

-  By phone at **1.888.808.3529** or **+1.416.207.9936**
-  Online, by using our chat line. Just [click here](#)
-  By email, just fill out and send us the following information:
Message:

The **Support** page lists the Technical Support phone numbers.

The **Support** page has a link to live chat assistance.

The **Support** page has an e-mail form that will be sent directly to Telax Technical Support.

Offline, support can be reached at support@telax.com.