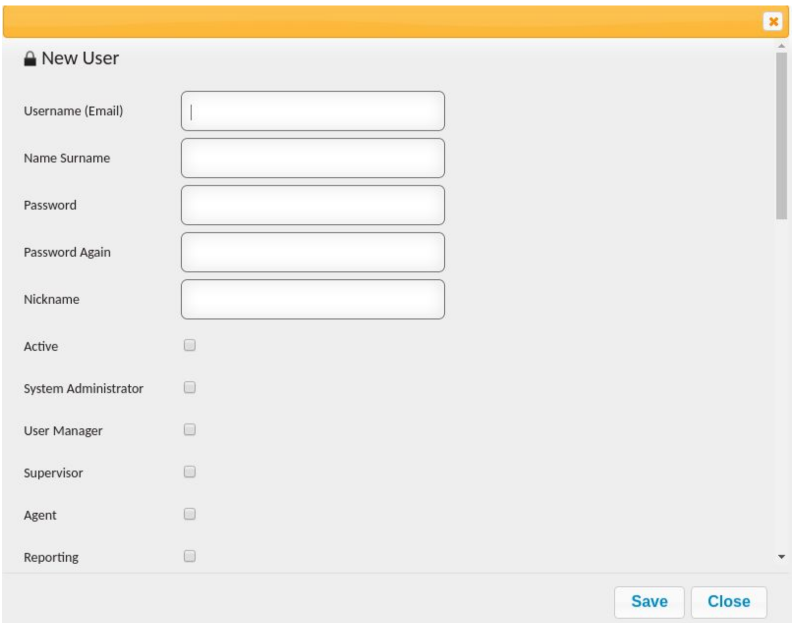
Users

Users registered in the system are displayed in this section. Adding new users, deleting existing users, authorizing users, determining roles, and notification settings are all carried out here.

Adding a Users

1. Click the add new user button, , located in the top right corner of the page. The following pop-up will appear:



Note: All of the user functions are not displayed; the scroll bar has to be used.

2. Click the “Username (Email)” input box, type the user’s email address an example is shown below:

   Note: This is a mandatory field

3. Click the “Name Surname” input box, type the user’s name and surname an example is shown below:

   Note: This is a mandatory field

4. Click the “Password” input box, type a password for the user. An example is shown below:

   Note: This is a mandatory field

5. Click the “Password Again” input box and type the password used in the “Password” input box as displayed below:

   Note: This is a mandatory field

6. If desired, a nickname for the user can be displayed. Click the "Nickname" input box, type the user's desired nickname an example is shown below:

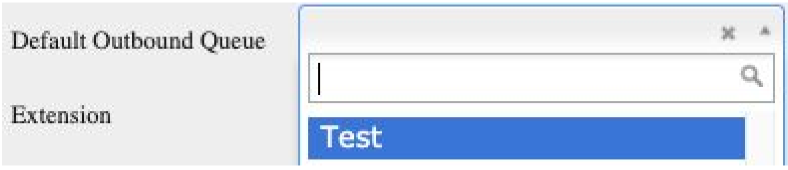
7. Underneath the "Nickname" input box, there are 13 checkboxes allowing for different user permissions, check the desired permissions that apply to the new user. The definitions for each of these checkboxes is evident below:

Active	This option demonstrates that the agent is ready to make and receive calls. This checkbox needs to be selected for the user to use Call Center Studio. Note: This is not a mandatory field. A user can not make or receive calls if this box remains unchecked.
System Administrator	If this option is checked, the user will have access to the System Administrator tab.
User Manager	If this option is checked, the user will have the authority to manage other users' information and observe their progress. Note: This option is recommended for Supervisors.
Supervisor	If this option is checked, the user will have access to the Supervisor tab.
Agent	If this option is checked, the user will have access to the Agent tab.
Reporting	If this option is checked, the user will have access to the Reporting tab.
Quality Control	If this option is checked, the user will have access to the Quality Control tab.

Custom Application Use	If this option is checked, the user will have the authority to use third-party integrations.
Extension Screen	If checked, the user will have access to an extension screen that works similar to an IP Phone, used to answer calls. Can only be selected if the agent checkbox is left unchecked.
Operator Console	If this option is checked, the user will have access to the Operator Console.
Only Use IP Phone	This option is only for telephone usage instead of the softphone located in the Agent Module. *Note 1: Checking this box means that the Agent Screen will not be used. Only an IP Phone will be used to make and receive calls.* *Note 2: It can only be selected if the agent checkbox is left unchecked.* *Note 3: If this option is selected, the extension screen option will be selected by default.*
Use IP Phone	This option is for IP Phone users.
Enable IP Restriction	Restricts access to the system based on IPs mentioned in the ***Allowed Address*** section below. When checked, a separate address can be used to log in. Below this check is the ***"Allowed Addresses"*** input box, type the desired address.

8. Click the “Allowed Addresses” input box, type the allowed addresses in the layout shown below:

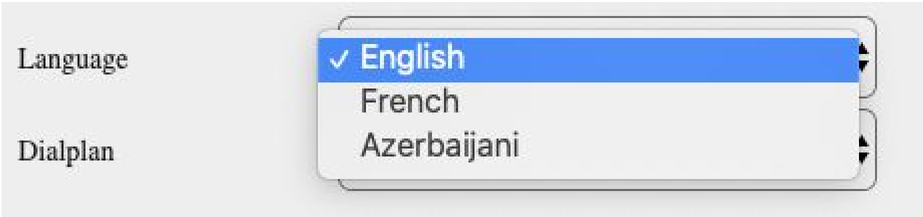
9. Click the desired “Default Outbound Queue”, from the dropdown list. If done correctly, the selection will look like the picture below:



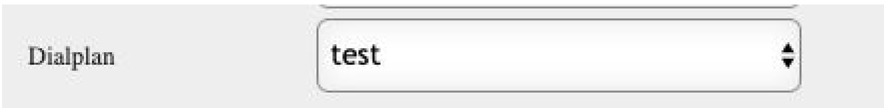
10. This option defines an extension number for the user within the system. Click the “Extension” input box, type the extension in the layout shown below:

11. Click the "Mobile Number" input box, type the mobile number in the layout defined in the Dialer section. *(See* ***Dialer*** *Section)*

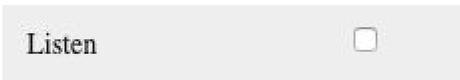
12. Click the desired “Language”, from the dropdown list, if down correctly, the selection will look like the picture below:



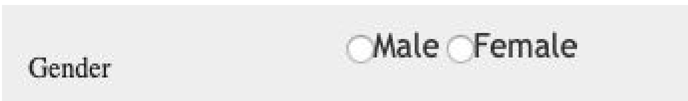
13. Click the "Mobile Number" input box, type the mobile number in the layout defined in the Dialer section.



14. Check the following box to be able to listen to the agent on the phone. (Note: If the listen checkbox is not checked, a notification will appear on the supervisor’s screen, stating the supervisor does not have access to listen.

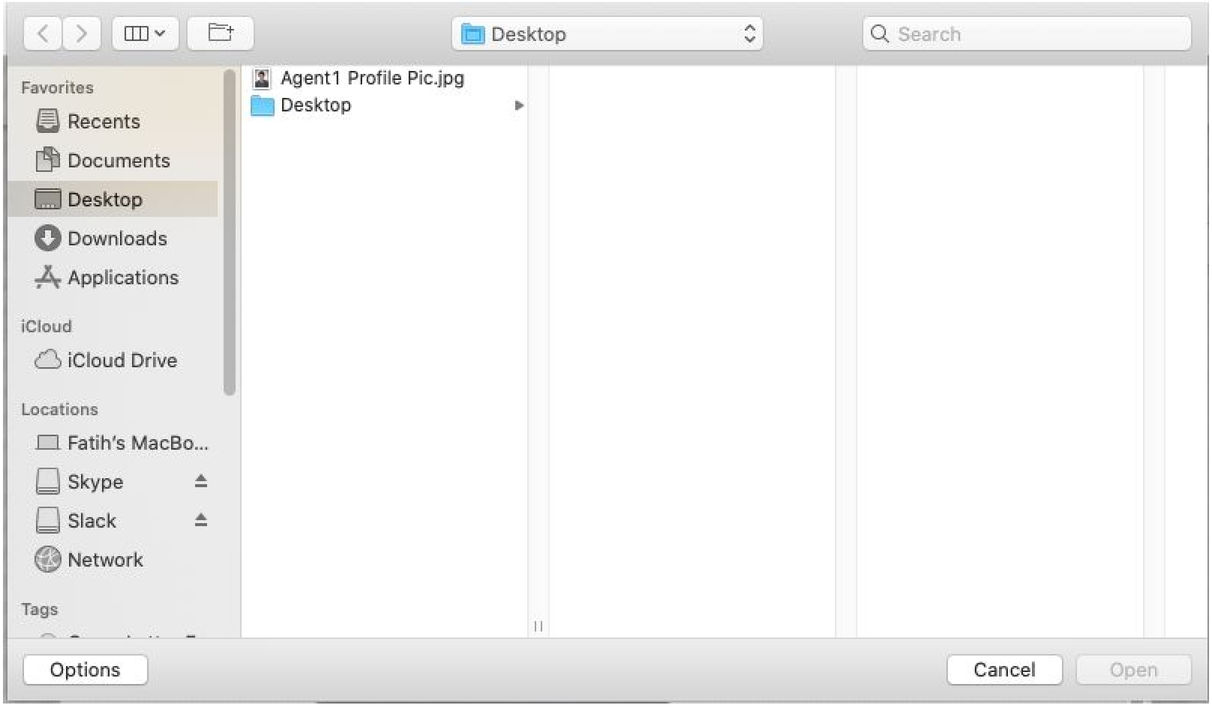


15. Click the following box, based on the gender of the user (If desired):



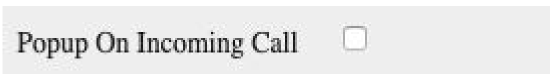
16. To add the photo of the user, press the choose file button, 

, if done correctly, the following pop-up window will be displayed:



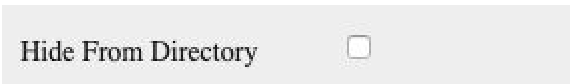
17. Choose the photo file of the user and then click the open. “Agent1 Profile Pic” file is used here as an example.
18. Once the selection is made, it will look like the picture below.

19. Check the following box to enable the Popup to answer an incoming call for a related user:



20. Click the "Birthday" input box, choose the birthday of the user in the layout shown below:

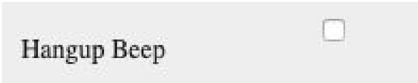
21. Check the following box to hide the user from the directory. This function makes the user invisible in the directory.



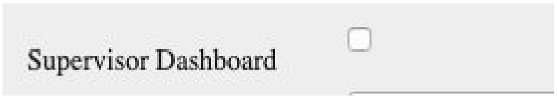
22. Click the "Custom ID" input box, type a unique ID value. An example is shown below:

23. Check the following box to disable the user to change his/her queue.

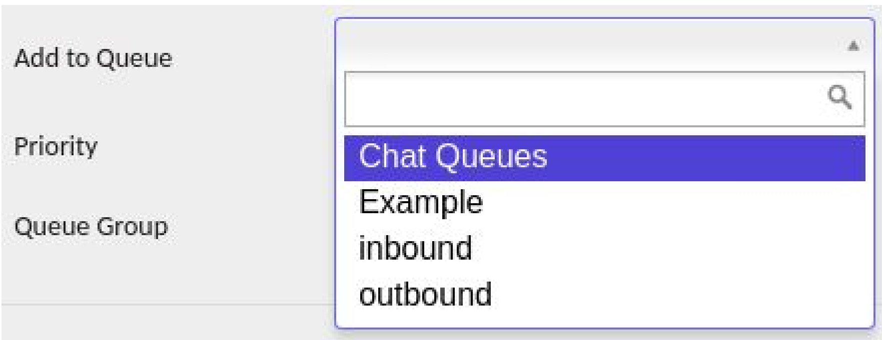
24. Check the following box to enable a sound notification after the call is hung up in the form of a beep. It helps users to understand when the call is finished.



25. Check the following box to enable the supervisor dashboard function for the related user:

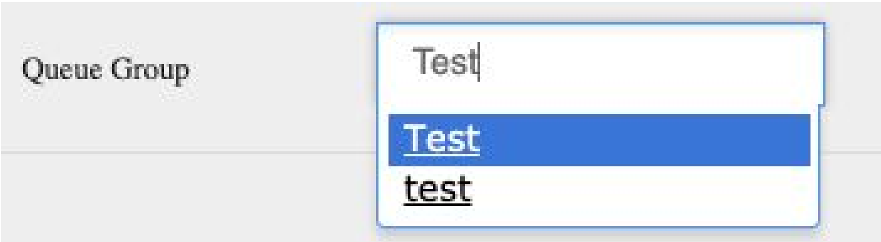


26. Click the desired “Queue” to add the user in a queue, from the dropdown list. If down correctly, the selection will look like the picture below:



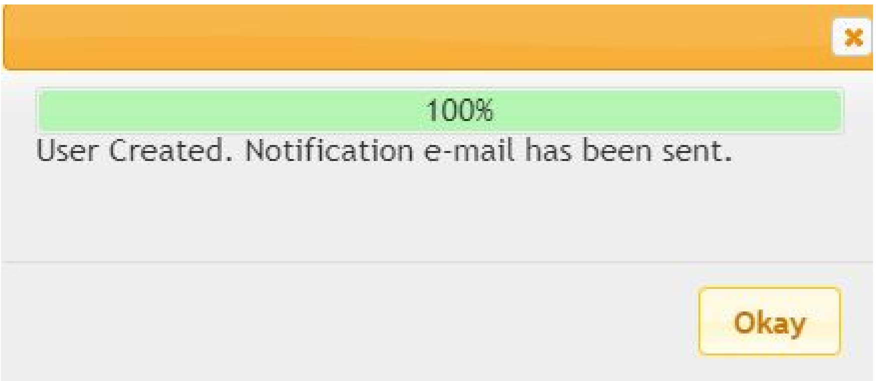
27. Click the “Priority” input box, type priority value in the layout shown below. When the call comes, it will go to the user, which has the highest priority number (100 is the highest) in the queue. If that user is not available, the call goes to the next user respectively, who has the second-largest priority number:

28. Click the desired "Queue Group" to add the user in a queue group, from the dropdown list. If down correctly, the selection will look like the picture below:



29. After all the desired additions have been made, click the save button, 

, the following pop-up window will appear:

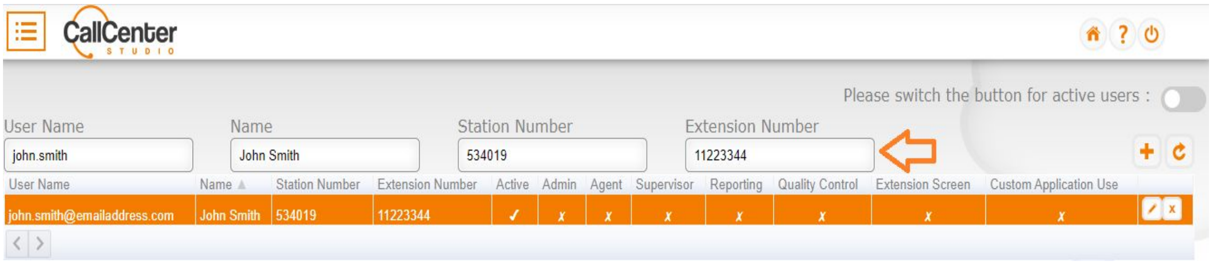


30. Click the Okay button, 

, to acknowledge the addition. A notification email will also be sent to the provided address to inform the user.

Searching For Users

There are 4 possible ways to search for users:



1. ***Searching via Email***

Type the user's registered email address to find the desired user.

2. ***Searching via Name & Surname***

Type the user's Name and Surname to find the desired user.

3. ***Searching via the Station Number***

Type the user's Station Number to find the desired user. Note that the Station Number is formed within the system and is provided while adding a user. (See ***Adding a User*** Section*)*

4. Searching via the Extension Number

Type the user's Extension Number to find the desired user.

Example: John's Station Number was set as 11223344, so this number can be typed as shown below:

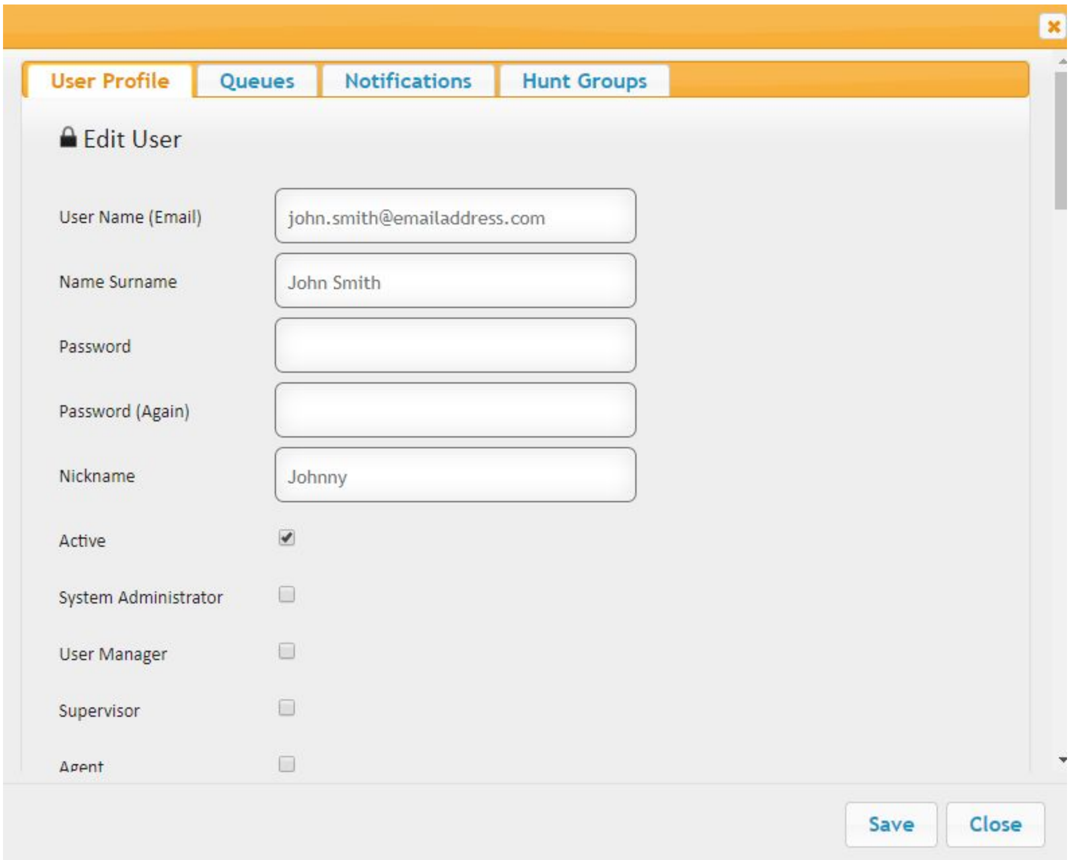
Editing a Users

After a new user is added, the edit button can be used. When the edit button is pressed, a pop-up appears, allowing the user to change the access levels and update additional information.

1. To edit a user, click the edit button, , located on the far right of the Users Name as shown below:

Right next to the edit button, the delete button is also evident. (See ***Deleting a User*** *Section).*

2. After pressing the edit button, the following pop-up appears:



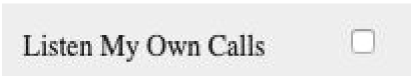
3. As evident in the picture above, 4 tabs are available in this pop-up, which are:

   - *User Profile*
   - *Queues*
   - *Notifications*
   - *Hunt Groups*

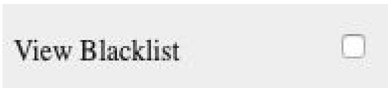
User Profile Tab

This tab is commonly used to update any sort of information of a user. Here, permissions of users can be managed and changed. Moreover, dial plan and languages can be selected, as well as various other options. All of these options are evident below:

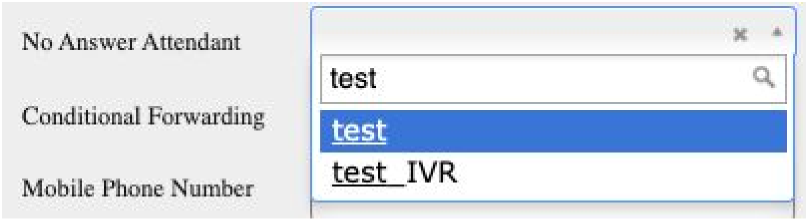
1. All of the input boxes mentioned above in the "Adding a User**"** section can be changed.
2. In addition to the input boxes, the following information also can be changed:
    a. Check the following box to enable the user to listen to his/her own recorded calls.



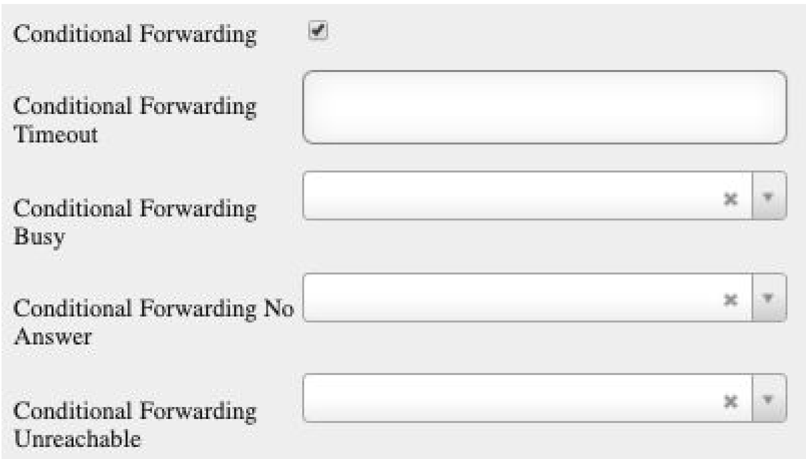
    b. Check the following box, to enable the user to view the blacklist.



c. Users can have his/her own IVR. Here it can be selected after creating a new one in the IVR section. Click the desired “No Answer Attendant” to add an IVR for no answering, from the dropdown list. If down correctly, the selection will look like the picture below.



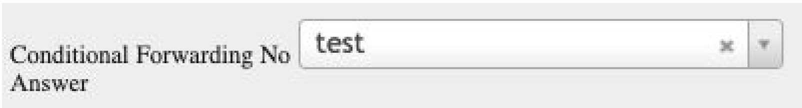
d. Click the “Station Number” input box, the following input box and dropdown lists will appear. If the user needs an IP phone and wants to use individual announcements, the conditional forwarding function can be used.



- Type the conditional forwarding timeout duration in the following input box shown below:

- Click the desired individual announcement for the “busy” situation from the dropdown list. If down correctly, the selection will look like the picture below:

- Click the desired individual announcement for the “no answer” situation from the dropdown list. If down correctly, the selection will look like the picture below:

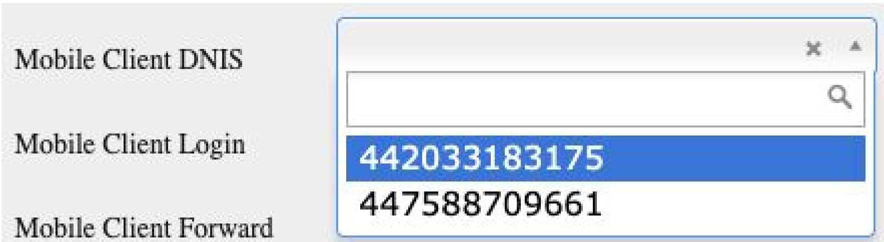


- Click the desired individual announcement for the “unreachable” situation from the dropdown list. If down correctly, the selection will look like the picture below:

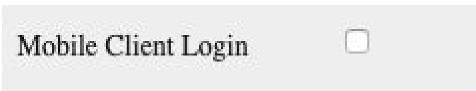
e. Click the “Station Number” input box, type the station number which is automatically given by the system to use when creating a user on an IP phone, in the layout shown below:

f. Click the “Station Password” input box, type the station number that will be used for configuration in the layout shown below:

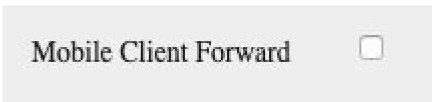
g. Click the desired “Mobile Client DNIS” to add the mobile client DNIS number from the dropdown list. If down correctly, the selection will look like the picture below:



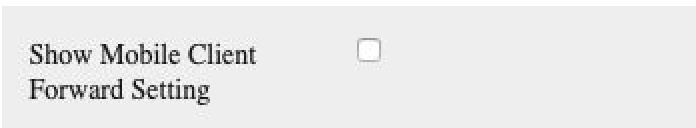
h. Check the following box, to enable the Mobile Client Login.



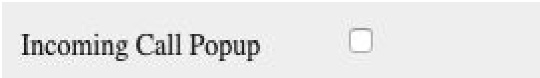
i. Check the following box, to enable the Mobile Client Forward.



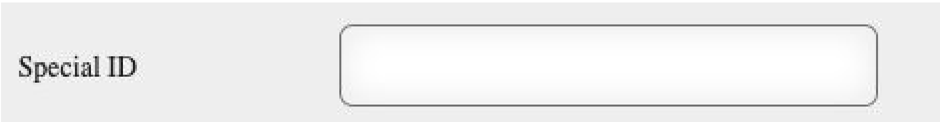
j. Check the following box to enable the user to see the mobile client forward setting.



k. Check the following box to show popups on the user's screen when the incoming call comes.



l. Click the “Special ID” input box, type the special ID of the user in the layout shown below:



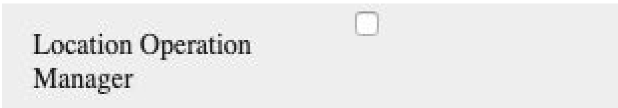
m. Check the following box to disable the supervisor from making calls.

Note: Disables supervisor from listening to agent calls. No notification will appear stating they do not have access.

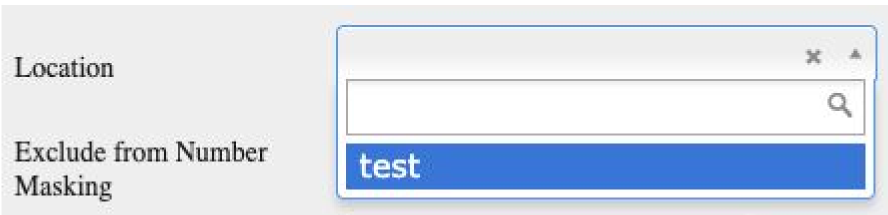
n. When the “Reject Transfer to Last User” checkbox is selected, if an IVR tree has been set up for transferring to the last user, this user will not be connected with the customer since this box is checked.

o. The Custom Field input boxes are used with third-party integrations. For more info, please contact the assigned Call Center Studio Program Manager.

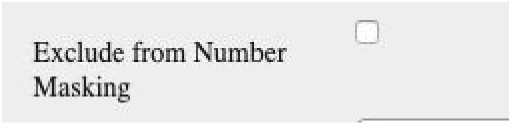
p. Check the following box to authorize the user as a location operation manager.



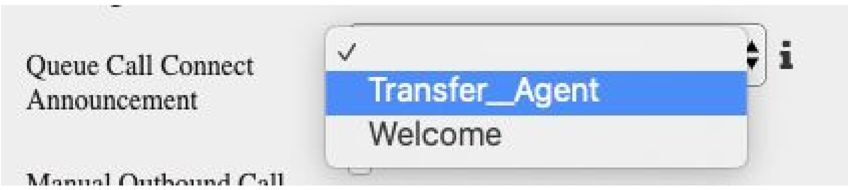
q. Click the desired "Location" to select the location operation from the dropdown list. If down correctly, the selection will look like the picture below:



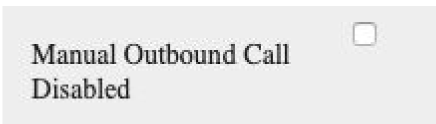
r. Check the following box to exclude a user from the Number Masking feature.



s. Select the desired announcement from the "Queue Call Connect Announcement" dropdown list. The announcement will play when the call is connected to a queue. Note: this will increase ringing status duration. Also, Queue Settings must allow agent announcements. If down correctly, the selection will look like the picture below:

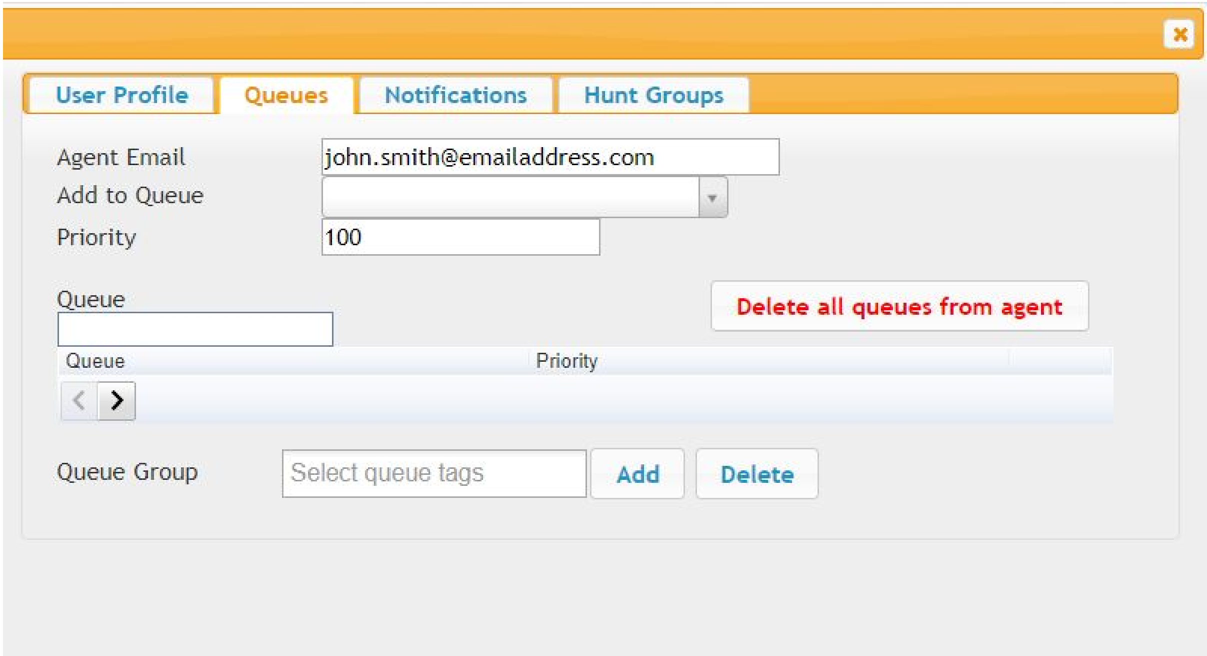


t. Check the following box to disable the user from outbound calls that can be done manually.



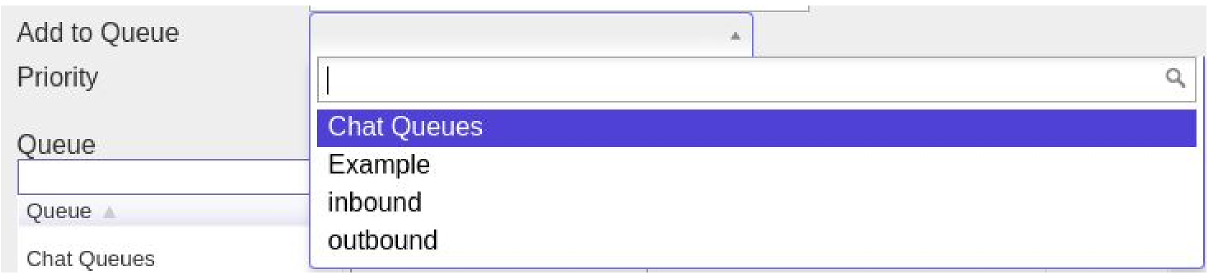
Queues Tab

This tab is used to add the desired agent/user to a defined queue. *(See **Queues** Section)*



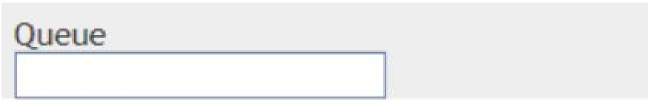
1. Since we are editing John Smith, his email address is evident in the related field.

2. As you can see underneath the Agent Email, additions can be made to the queue (Such as adding more queues to a specific user - *(See **Queues** Section)*



3. In most cases, the Priority value is defined according to the user's level of experience and knowledge. For instance, in the example below, the Priority value is set as 100 for John, meaning he will be the first one to receive an inquiry within a defined queue.

4. 'Queue' Box allows the user to type the name of a queue manually.

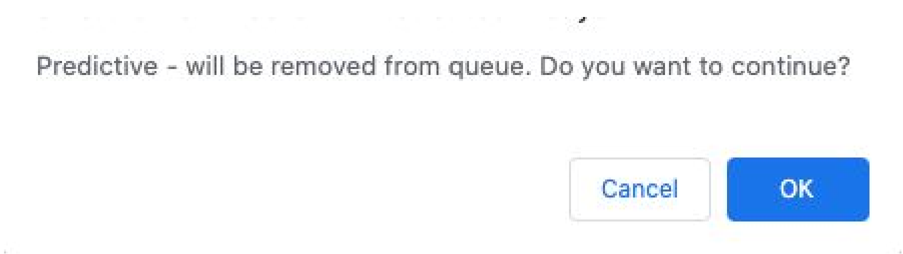


5. Delete all queues from the agent' button is located right next to it, allowing the user to pull the agent out of all the defined queues.

6. Added queues and priority levels can be seen here.

Delete a Queue

1. To delete queues from the user, click the delete button x . When the delete button is clicked, the following pop-up will appear, an example is shown below:



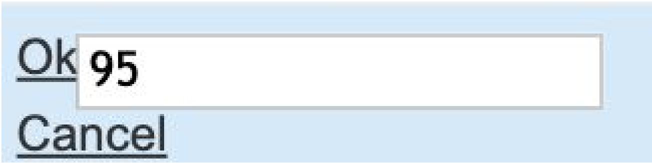
- *Select the cancel button,* Cancel *, to cancel the deletion.*
- *Select the OK button,* OK*, to confirm the deletion.*

2. Confirm the deletion by clicking the OK button, OK.

The screen will reload, and the deleted queue will not be shown.

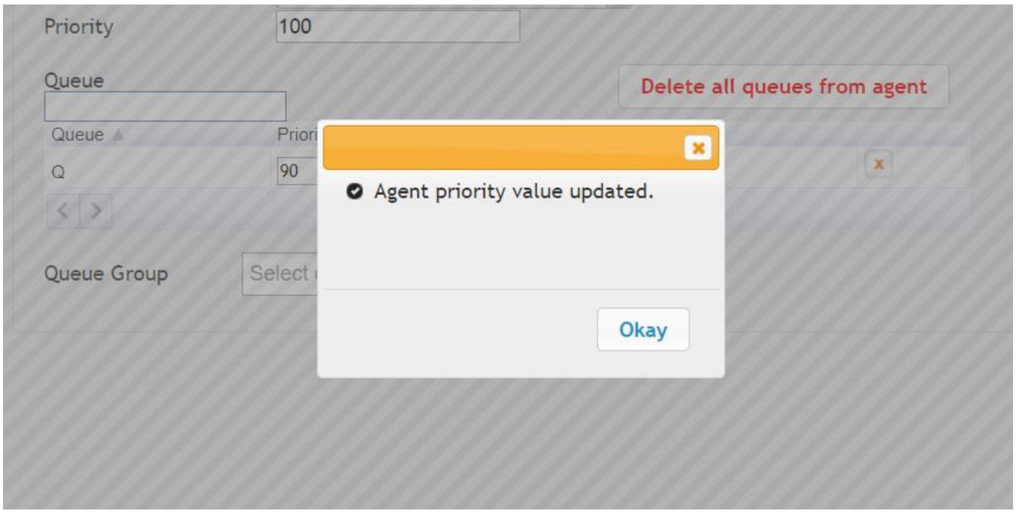
Changing the Priority level

1. Click the input box shown in the priority column and type the preferred priority level as described in the adding a user section.



2. Click the Ok button, 

, to acknowledge the additions and to update the priority value.

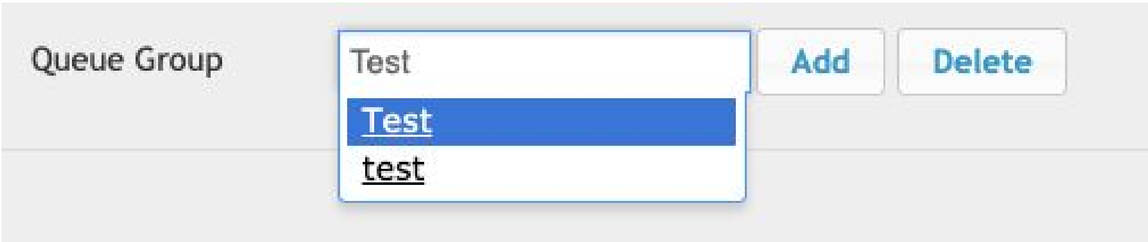


3. Click the cancel button, 

, to cancel the change.

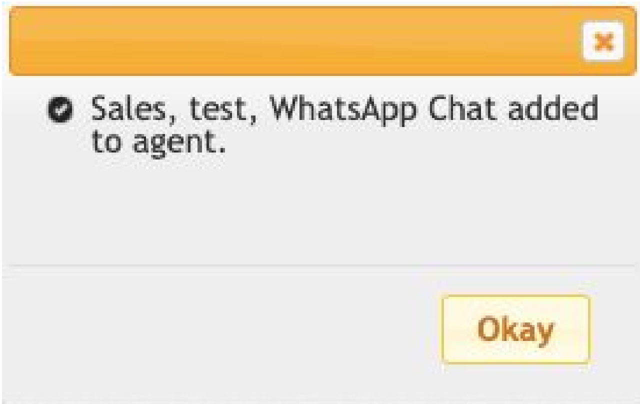
Adding Queue Group

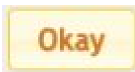
1. Click the desired "Queue group" to add a new queue group to the user, from the dropdown list,



2. Once the queue group is selected, click the Add button, 

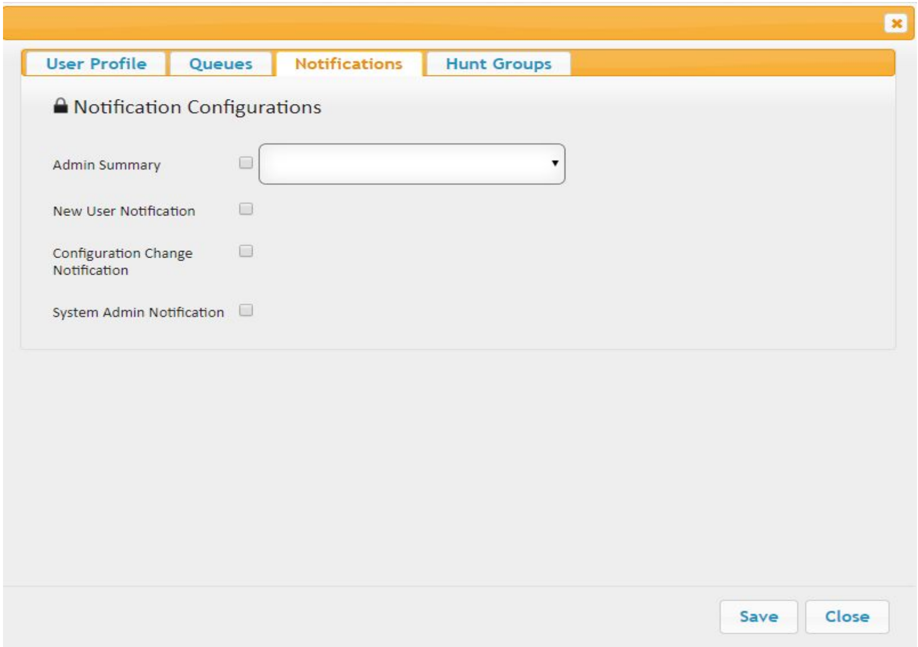
. When the add button is clicked, the following pop-up will appear:



3. Selecting the Okay button, 

, will confirm the addition.

Notification Tab

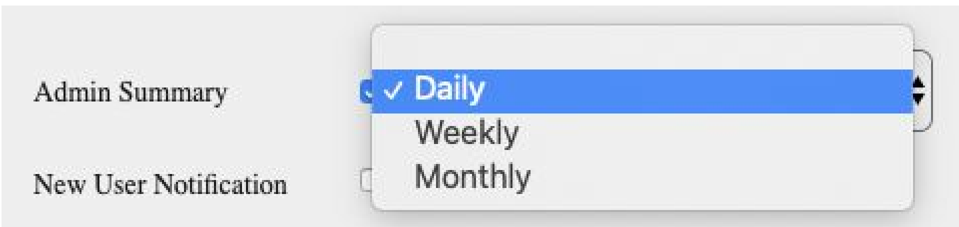


Notification Configurations

1. Administrator Summary Report Check Box:

Data can be gathered Daily, Weekly, and Monthly, according to the user’s preference.

A summary report is sent via email to the defined email address.

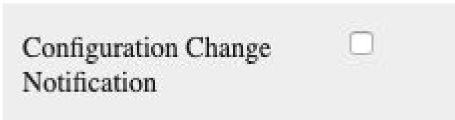


2. **New User Notification Check Box**:

A notification email is sent to inform that a new user is created.

3. **Configuration Change Notification Check Box**:

When the following checkbox is selected, if a queue is changed, details regarding the change will be sent to the user.

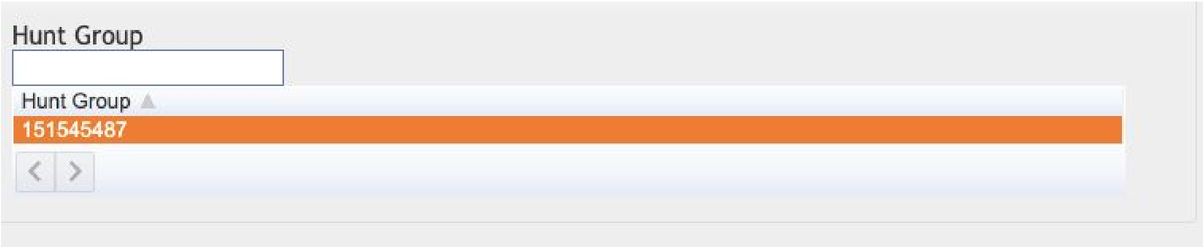


4. **System Admin Notification Check Box**:

The “System Admin Notification” checkbox is used to notify the admin of changes to the tenant.

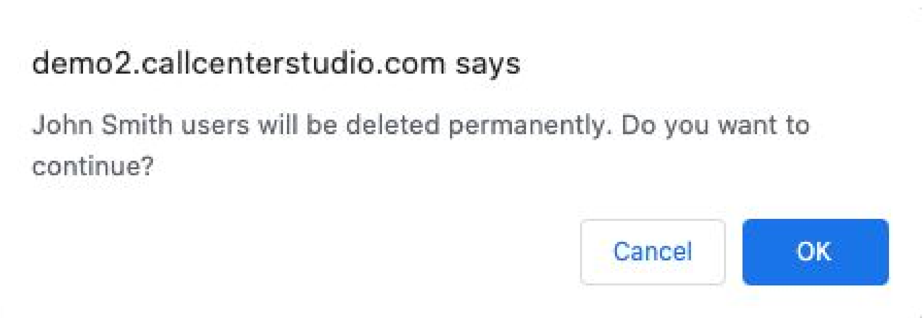
Hunt Groups Tab

1. Simply allows the user to choose a Hunt Group. (*See **Hunt Groups** for a detailed explanation*)



Deleting a Users

1. From the "Users" main page, click the delete button, x, to the right of the edit button, , to remove a user. When the delete button is clicked, the following pop-up will appear:



- *Select the cancel button,* Cancel *, to cancel the deletion.*
- *Selecting the OK button,* OK*, to confirm the deletion.*

2. Confirm the deletion by clicking the OK button, OK.

- *The screen will reload, and the deleted user will not be shown.*

Searching for a User

There are four ways to search for a user.

- *Username*
- *Name*
- *Station Number*
- *Extension Number*

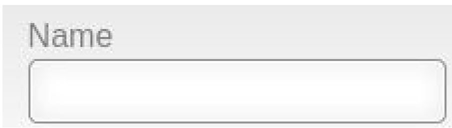
Username

1. Click the “Username” input box, type the desired Username. The input box is shown below:

Note: Partial names can be used when spelled correctly.

Name

1. Click the “Name” input box, type the desired name. The input box is shown below:



Note: Partial names can be used when spelled correctly.

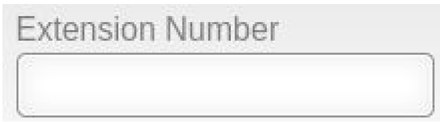
Station Number

1. Click the “Station Number” input box, type the desired station number. The input box is shown below:

Note: Partial names can be used when spelled correctly.

Extension Number

1. Click the “Extension Number” input box, type the desired extension number. The input box is shown below:



Note: Partial names can be used when spelled correctly.