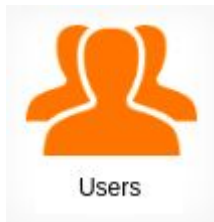



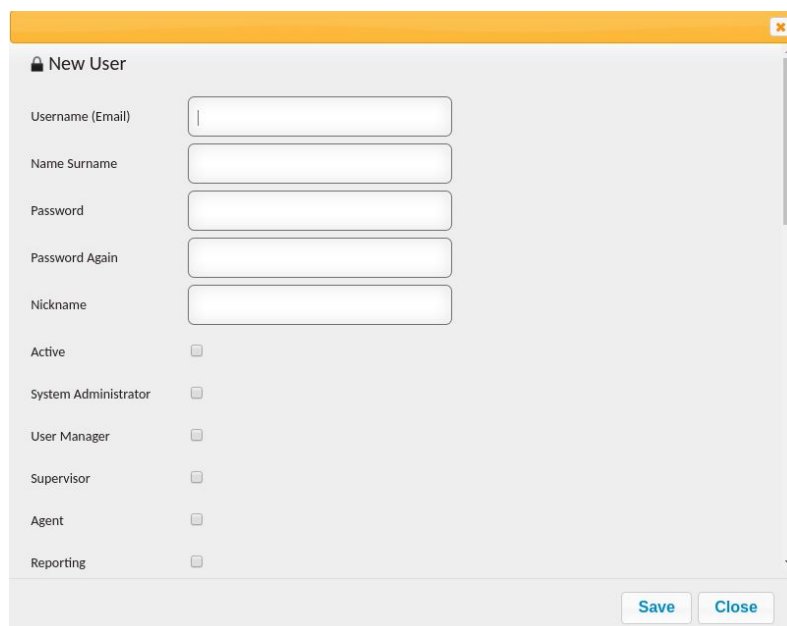
## Users



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.*

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

*Note: This is a mandatory field*

Username (Email)	<input type="text" value="john.smith@callcenterstudio.com"/>
------------------	--

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

*Note: This is a mandatory field*

Name Surname	<input type="text" value="John Smith"/>
--------------	---

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

*Note: This is a mandatory field*

Password	<input type="text" value="123456"/>
----------	-------------------------------------

- 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*

Password Again	<input type="text" value="123456"/>
----------------	-------------------------------------

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:

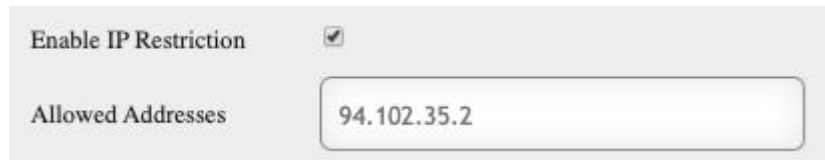


7. Underneath the “Nickname” input box, there are 13 checkboxes allowing for different user permissions, check the desired permissions that apply to the new user. The definitions for each of these checkboxes is evident below:

<p>Active <input type="checkbox"/></p>	<p>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.</p> <p>Note: This is not a mandatory field. A user can not make or receive calls if this box remains unchecked.</p>
<p>System Administrator <input type="checkbox"/></p>	<p>If this option is checked, the user will have access to the System Administrator tab.</p>
<p>User Manager <input type="checkbox"/></p>	<p>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.</p>
<p>Supervisor <input type="checkbox"/></p>	<p>If this option is checked, the user will have access to the Supervisor tab.</p>
<p>Agent <input type="checkbox"/></p>	<p>If this option is checked, the user will have access to the Agent tab.</p>
<p>Reporting <input type="checkbox"/></p>	<p>If this option is checked, the user will have access to the Reporting tab.</p>
<p>Quality Control <input type="checkbox"/></p>	<p>If this option is checked, the user will have access to the Quality Control tab.</p>

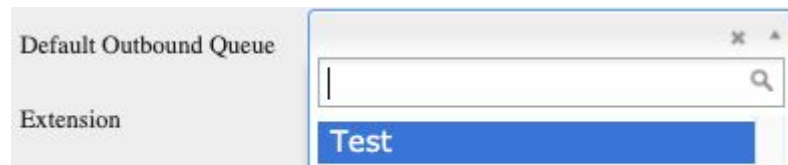
<p>Custom Application Use <input type="checkbox"/></p>	<p>If this option is checked, the user will have the authority to use third-party integrations.</p>
<p>Extension Screen <input type="checkbox"/></p>	<p>If checked, the user will have access to an extension screen that works similar to an IP Phone, used to answer calls. Can only be selected if the agent checkbox is left unchecked.</p>
<p>Operator Console <input type="checkbox"/></p>	<p>If this option is checked, the user will have access to the Operator Console.</p>
<p>Only Use IP Phone <input type="checkbox"/></p>	<p>This option is only for telephone usage instead of the softphone located in the Agent Module.</p> <p><i>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.</i></p> <p><i>Note 2: It can only be selected if the agent checkbox is left unchecked.</i></p> <p><i>Note 3: If this option is selected, the extension screen option will be selected by default.</i></p>
<p>Use IP Phone <input type="checkbox"/></p>	<p>This option is for IP Phone users.</p>
<p>Enable IP Restriction <input type="checkbox"/></p>	<p>Restricts access to the system based on IPs mentioned in the <b>Allowed Address</b> section below. When checked, a separate address can be used to log in. Below this check is the “<b>Allowed Addresses</b>” input box, type the desired address.</p>

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



A screenshot of a user configuration form. It shows a label 'Enable IP Restriction' with a checked checkbox. Below it is a label 'Allowed Addresses' next to a text input field containing the IP address '94.102.35.2'.

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



A screenshot of a user configuration form. It shows a label 'Default Outbound Queue' next to a dropdown menu. The dropdown menu is open, showing a search bar and a list of options, with 'Test' selected and highlighted in blue. Below the dropdown is a label 'Extension'.

- 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:



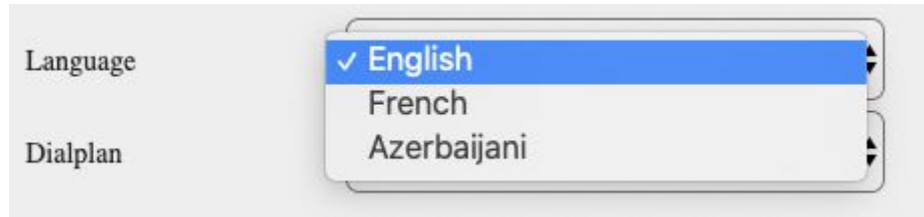
A screenshot of a user configuration form. It shows a label 'Extension' next to a text input field containing the number '1548'.

- Click the "Mobile Number" input box, type the mobile number in the layout defined in the Dialer section. (See [Dialer Section](#))



A screenshot of a user configuration form. It shows a label 'Mobile Phone Number' next to a text input field containing the number '1 737 212 98 66'.

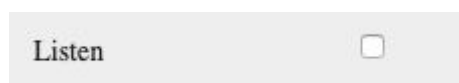
12. Click the desired “Language”, from the dropdown list, if down correctly, the selection will look like the picture below:



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

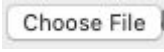


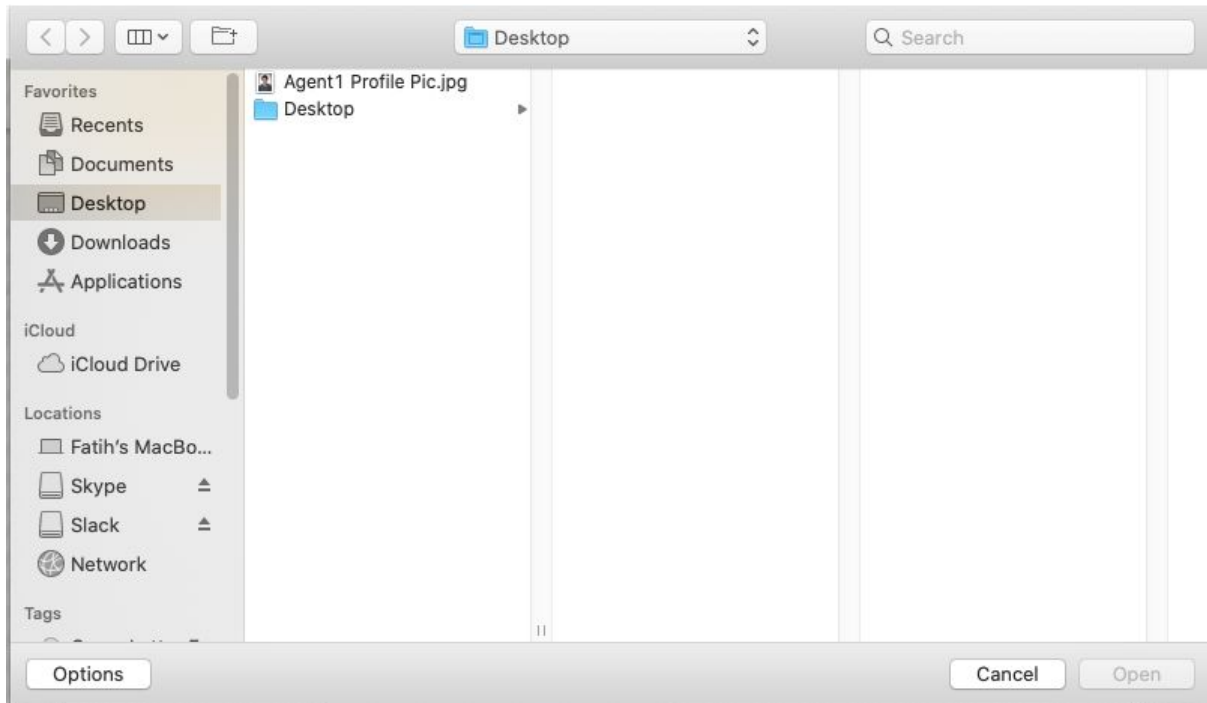
14. Check the following box to be able to listen to the agent on the phone. (Note: If the listen checkbox is not checked, a notification will appear on the supervisor’s screen, stating the supervisor does not have access to listen.



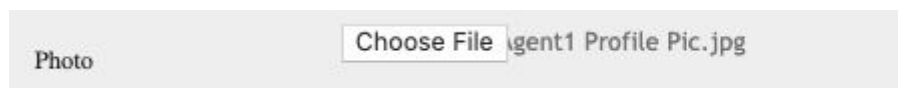
15. Click the following box, based on the gender of the user (If desired):



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:



The screenshot shows a user profile form with the following fields and values:

- Birthday:** 1990-05-02
- Hide From Directory:**
- Custom ID:** (empty)
- Queue modification is not allowed:**
- Hangup Beep:**

The birthday selection is shown in a calendar for May 1990. The date 02 (Tuesday) is selected.

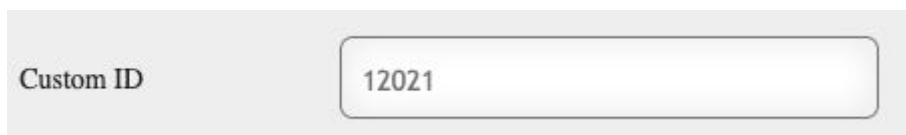
Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

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



Hide From Directory

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



Custom ID

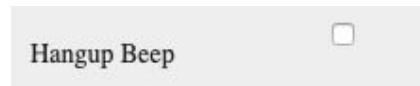
23. Check the following box to disable the user to change his/her queue.



Queue modification is not allowed



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.



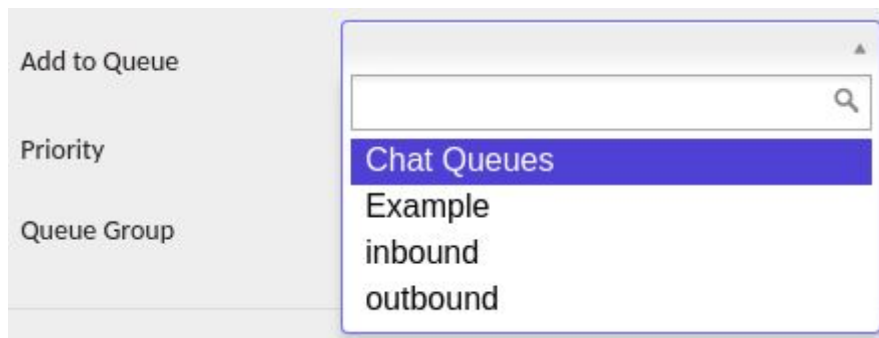
Hangup Beep

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



Supervisor Dashboard

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



Add to Queue

Priority

Queue Group

Chat Queues

Example

inbound

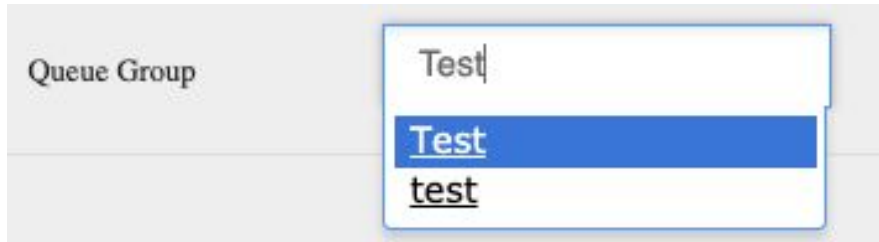
outbound


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:

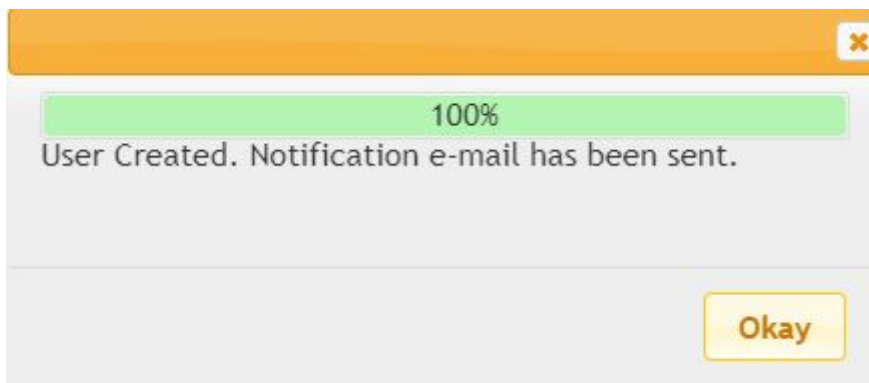



Priority

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:



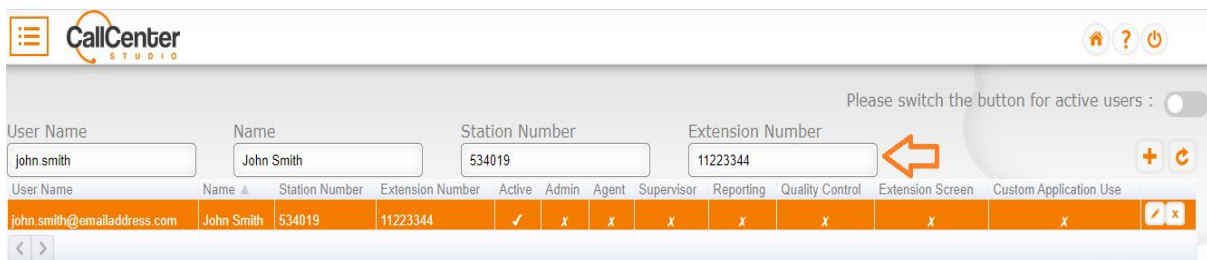
29. After all the desired additions have been made, click the save button, , the following pop-up window will appear:



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:




Allowed Addresses	<input type="text"/>
<b>Extension</b>	<input type="text" value="11223344"/>
No Answer Attendant	<input type="text"/> x ▾

---

## 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:

The screenshot shows a pop-up window titled "Edit User" with a close button in the top right corner. The window has four tabs: "User Profile", "Queues", "Notifications", and " Hunt Groups". The "User Profile" tab is selected. The form contains the following fields:

- User Name (Email): john.smith@emailaddress.com
- Name Surname: John Smith
- Password: (empty)
- Password (Again): (empty)
- Nickname: Johnny
- Active:
- System Administrator:
- User Manager:
- Supervisor:
- Agent:

At the bottom right of the window are "Save" and "Close" buttons.

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:*

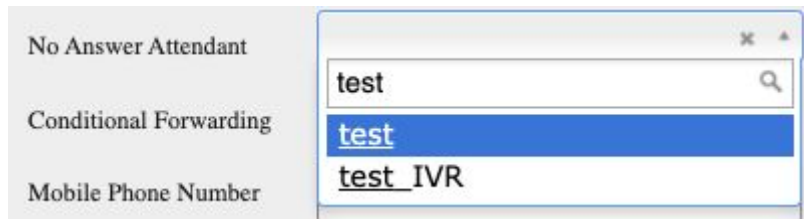
1. All of the input boxes mentioned above in the “Adding a User” section can be changed.
2. In addition to the input boxes, the following information also can be changed:
  - a. Check the following box to enable the user to listen to his/her own recorded calls.

Listen My Own Calls

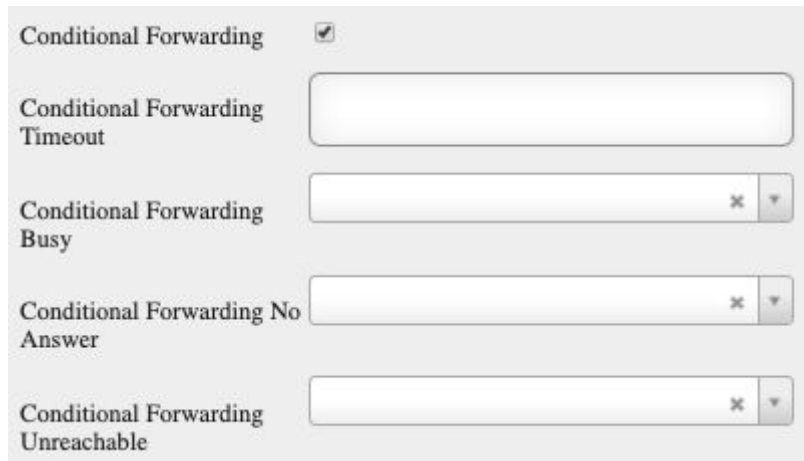
- b. Check the following box, to enable the user to view the blacklist.

View 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 done 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.

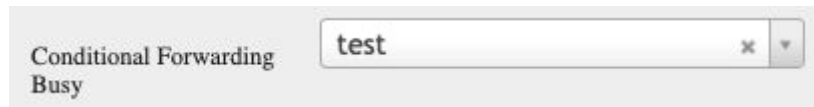


- Type the conditional forwarding timeout duration in the following input box shown below:

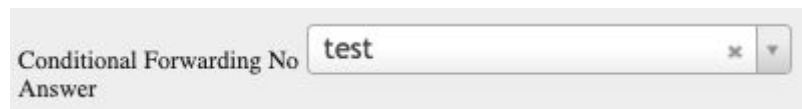




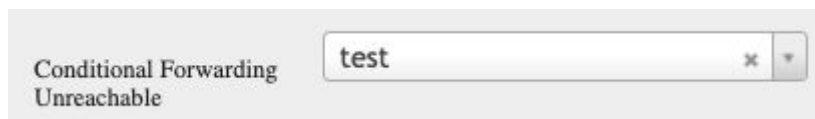
- Click the desired individual announcement for the “busy” situation from the dropdown list. If down correctly, the selection will look like the picture below:



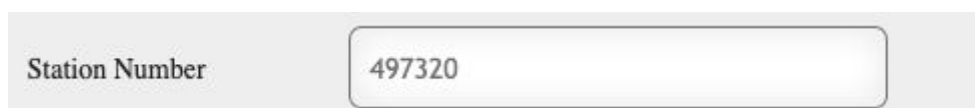
- Click the desired individual announcement for the “no answer” situation from the dropdown list. If down correctly, the selection will look like the picture below:



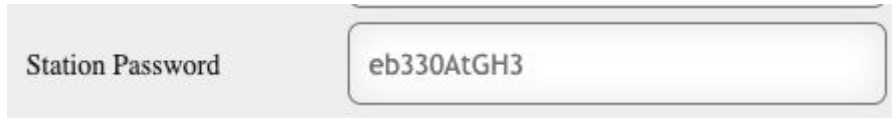
- Click the desired individual announcement for the “unreachable” situation from the dropdown list. If down correctly, the selection will look like the picture below:



- 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:



A screenshot of a configuration form. On the left, the text "Station Password" is displayed. To its right is a text input field containing the alphanumeric string "eb330AtGH3".

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



A screenshot of a configuration form. On the left, the text "Mobile Client DNIS" is displayed. To its right is a dropdown menu that is open, showing a search bar and two options: "442033183175" and "447588709661". The first option is highlighted with a blue background.

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



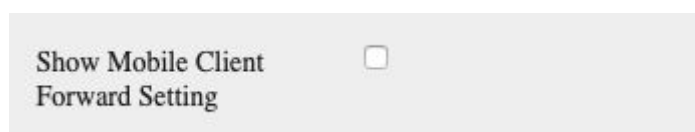
A screenshot of a configuration form. The text "Mobile Client Login" is displayed next to an unchecked checkbox.

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



A screenshot of a configuration form. The text "Mobile Client Forward" is displayed next to an unchecked checkbox.

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

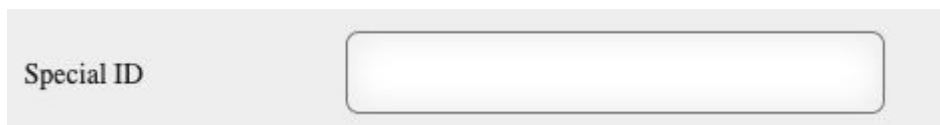


A screenshot of a configuration form. The text "Show Mobile Client Forward Setting" is displayed next to an unchecked checkbox.

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

A light gray rectangular box containing the text "Incoming Call Popup" on the left and a small, empty square checkbox on the right.

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

A light gray rectangular box containing the text "Special ID" on the left and a white rectangular input field with a thin gray border on the right.

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

A light gray rectangular box containing the text "Supervisor Softphone Disabled" on the left and a small, empty square checkbox on the right.

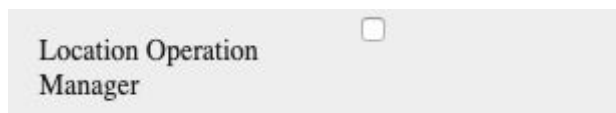
*Note: Disables supervisor from listening to agent calls. No notification will appear stating they do not have access.*

- 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.



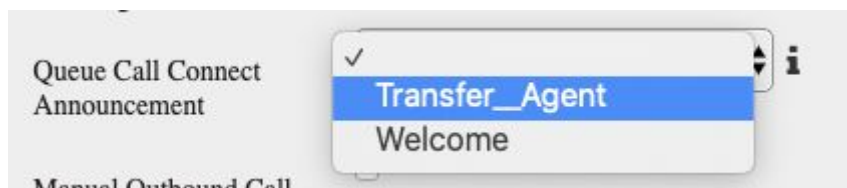
- q. Click the desired “Location” to select the location operation from the dropdown list. If down correctly, the selection will look like the picture below:



- 
- 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 done correctly, the selection will look like the picture below:

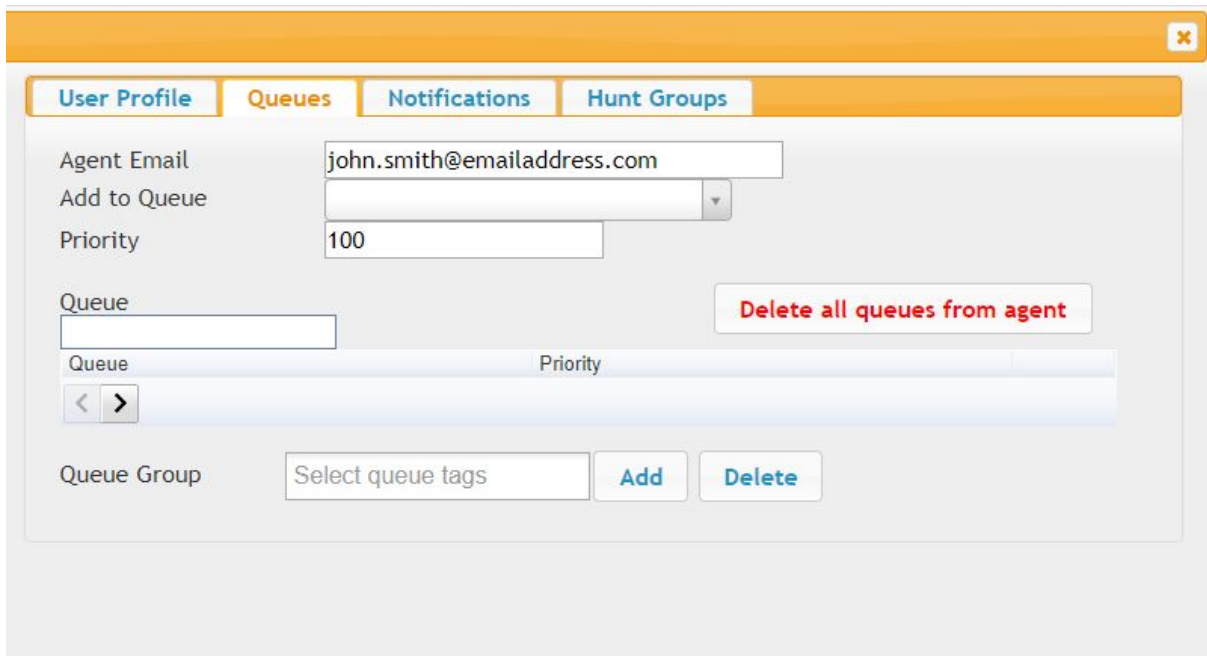


- t. Check the following box to disable the user from outbound calls that can be done manually.



## Queues Tab

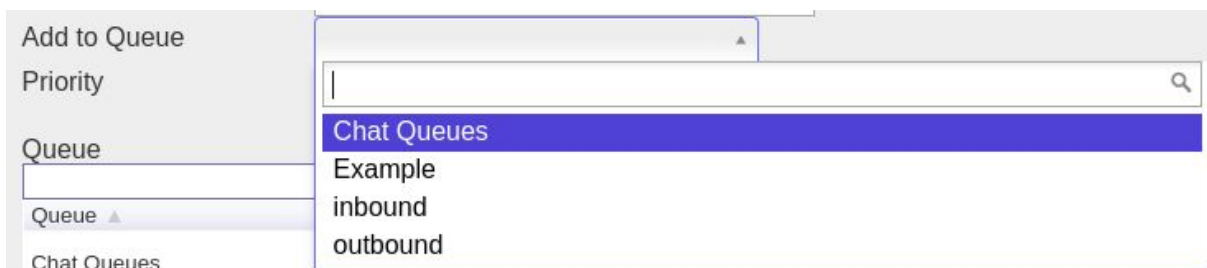
This tab is used to add the desired agent/user to a defined queue. (See [Queues Section](#))



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](#)))



- 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.

Priority	<input type="text" value="100"/>
----------	----------------------------------

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

Queue	<input type="text"/>
-------	----------------------

- 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.

**Delete all queues from agent**


- Added queues and priority levels can be seen here.

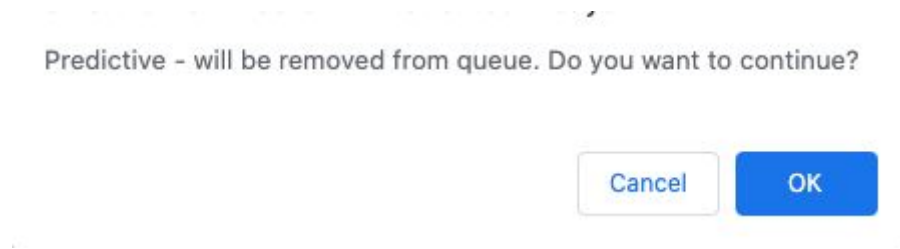
Queue ▲	Priority	
Inbound	<input type="text" value="100"/>	<input type="button" value="x"/>
Outbound	<input type="text" value="100"/>	<input type="button" value="x"/>




< >

---

## Delete a Queue

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



- Select the cancel button, , to cancel the deletion.
  - Select the OK button, , to confirm the deletion.
2. Confirm the deletion by clicking the OK button, .

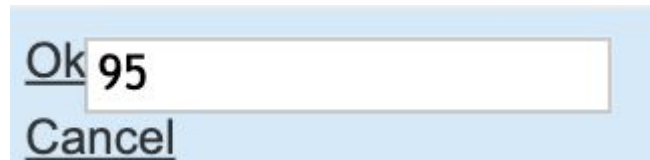
*The screen will reload, and the deleted queue will not be shown.*



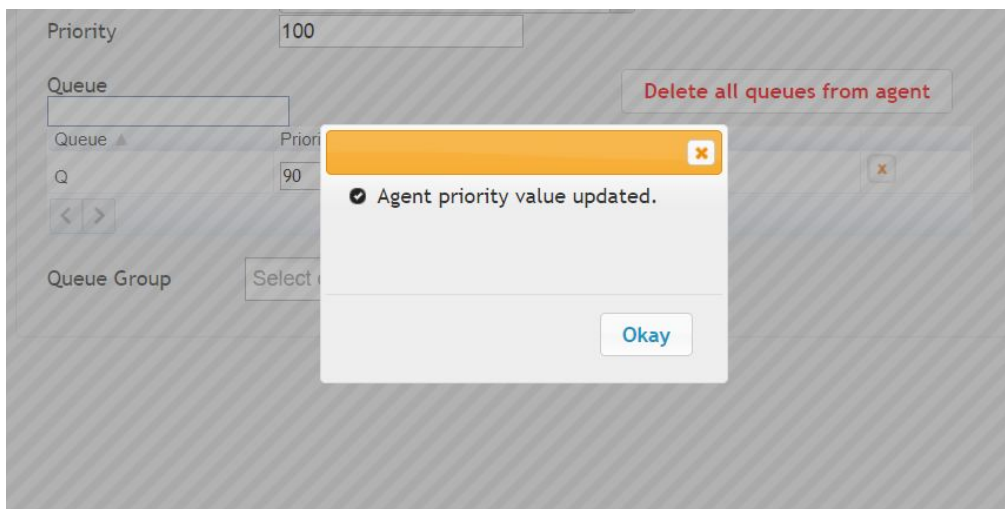
---

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

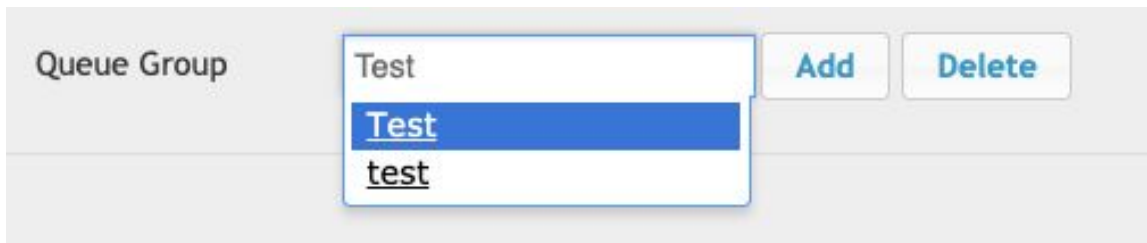



3. Click the cancel button, Cancel, to cancel the change.

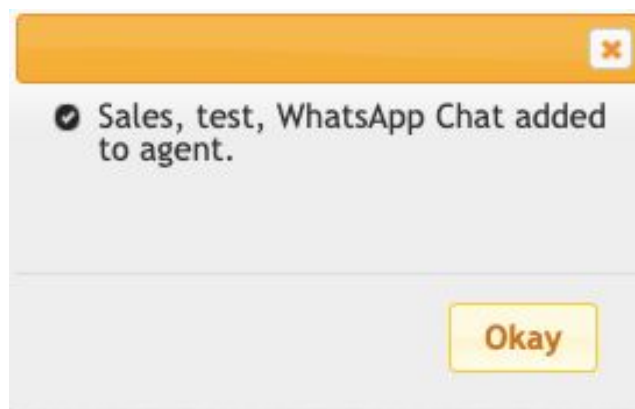
---

### Adding Queue Group

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

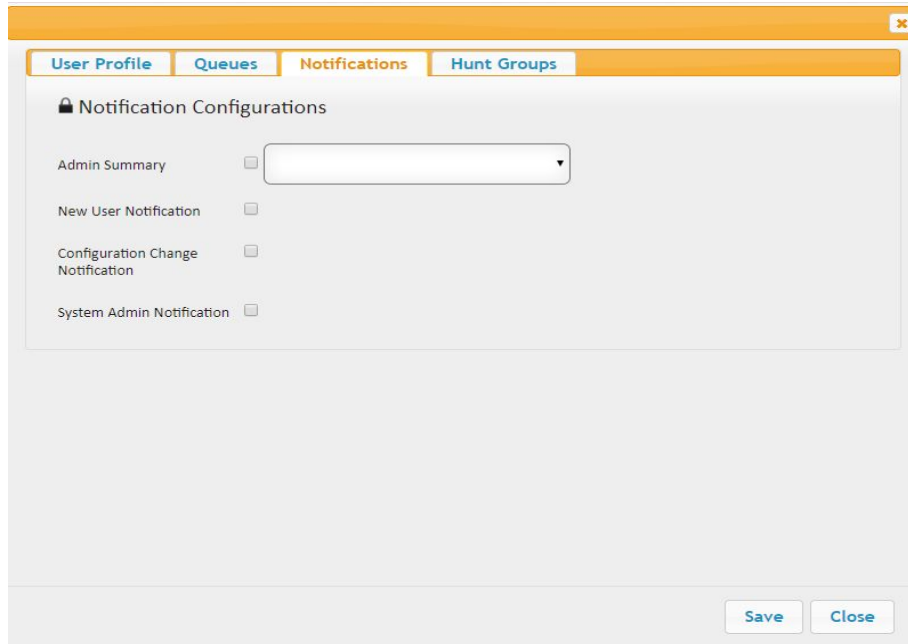


2. Once the queue group is selected, click the Add button, . When the add button is clicked, the following pop-up will appear:



3. Selecting the Okay button, , will confirm the addition.

## Notifications Tab

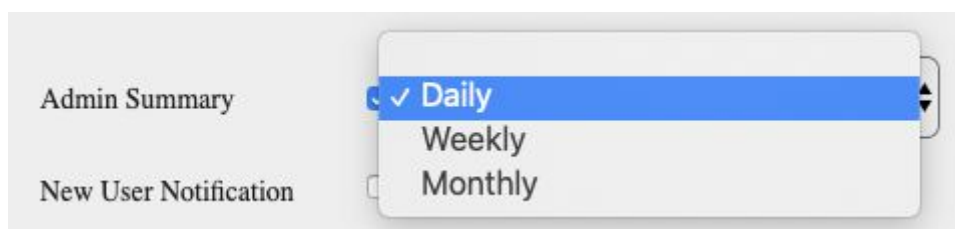


### Notification Configurations

#### 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.

New User Notification

**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.

Configuration Change  
Notification

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


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

System Admin Notification

---



## **Hunt Groups Tab**

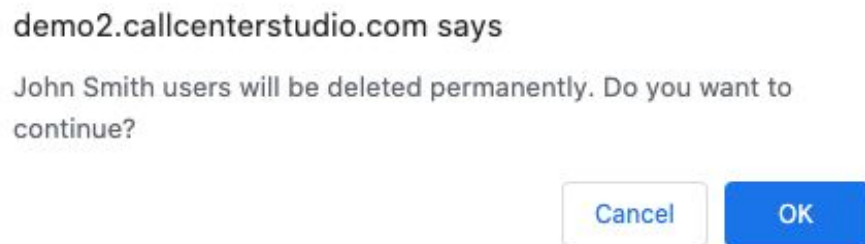
1. Simply allows the user to choose a Hunt Group. (See **Hunt Groups** for a detailed explanation)


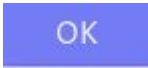
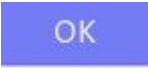
A screenshot of a web interface showing a "Hunt Group" selection dropdown. The dropdown is open, displaying a list of options. The first option, "151545487", is highlighted with an orange background. Above the list, the text "Hunt Group" is visible with a small upward-pointing triangle. Below the list, there are two small navigation buttons: a left-pointing chevron and a right-pointing chevron.

---

## Deleting a Users

1. From the “Users” main page, click the delete button, , 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, , to cancel the deletion.
  - Selecting the OK button, , to confirm the deletion.
2. Confirm the deletion by clicking the OK button, .
    - The screen will reload, and the deleted user will not be shown.

---

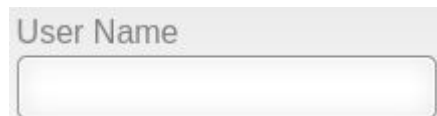
## **Searching for a User**

There are four ways to search for a user.

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

### **Username**

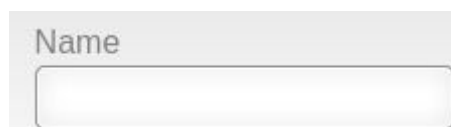
1. Click the “Username” input box, type the desired Username. The input box is shown below:

A screenshot of a web form element. It consists of a light gray rectangular header with the text "User Name" in a dark gray font. Below the header is a white rectangular input box with a thin gray border and rounded corners.

*Note: Partial names can be used when spelled correctly.*

### **Name**

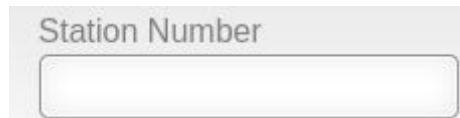
1. Click the “Name” input box, type the desired name. The input box is shown below:

A screenshot of a web form element. It consists of a light gray rectangular header with the text "Name" in a dark gray font. Below the header is a white rectangular input box with a thin gray border and rounded corners.

*Note: Partial names can be used when spelled correctly.*

### **Station Number**

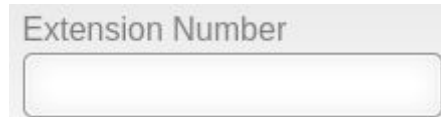
1. Click the “Station Number” input box, type the desired station number. The input box is shown below:

A screenshot of a web form element. It consists of a light gray rectangular header with the text "Station Number" in a dark gray font. Below the header is a white rectangular input field with a thin gray border and rounded corners.

*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:

A screenshot of a web form element. It consists of a light gray rectangular header with the text "Extension Number" in a dark gray font. Below the header is a white rectangular input field with a thin gray border and rounded corners.

*Note: Partial names can be used when spelled correctly.*