Help

VCC LIVE DESK

VCC LIVE ARCHIVER
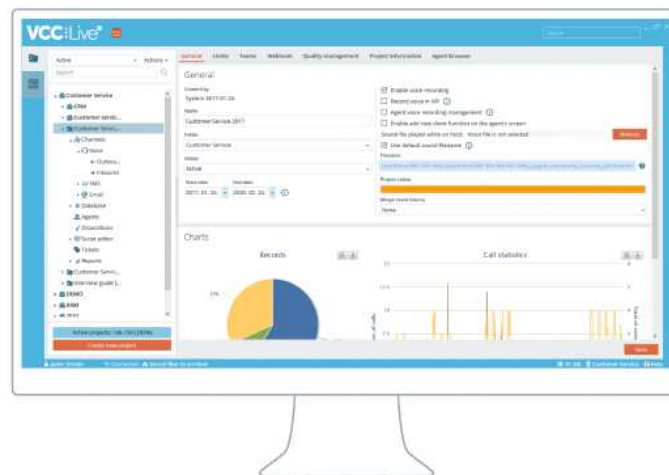
VCC Live Desk

This user guide leads you through the setup and features of VCC Live Desk.

About This User Guide

Introduction to VCC Live Desk

VCC Live Desk is a comprehensive cloud-based contact center platform that provides contact centers with tools and services they need in order to give customers high-quality support.

Why Choose Cloud-Based?

Using a cloud-based solution means that, by installing a single software application, contact centers can provide a full spectrum of incoming and outgoing multichannel services - phone, email, SMS, and chat. The integration and maintenance of a cloud-based solution does not require any additional IT developments or investment, and is easy to deploy. As well as being cost-efficient, it can be quickly integrated into your work processes, and your agents and supervisors can use the service anytime, anywhere, even from their homes.

General Information

Thank you for choosing VCC Live, the innovative cloud-based contact center solution.

This user guide leads you through the setup and features of **VCC Live Desk**. Whether you are a new or experienced user, we have you covered with this user guide. It covers all available features of the product.

> **Note:** the availability of features in your version of the software depends on which package you have purchased.

To Print This Document

We are always looking to make the VCC Live experience even better for our users, so we regularly release software updates, which may include general improvements, bug fixes, and new features. Due to these regular updates, we also update this user guide every week, thus making printed versions quickly outdated.

Please take this into account before printing any copies of this document. It may also help protect the environment.

You can download our user guides in PDF format here:
https://vcc.live/help

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To learn more about VCC Live, visit our website: https://vcc.live/

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VCC: Live®

Explanation of Symbols

Note Types

type	description
tip	Useful information.
note	Important information.
warning	A situation which, if not avoided, could result in data loss.

Mouse Clicks

left-click   right-click   double-click   drag and drop

Installation and Activation

System Requirements

An overview of requirements your system and network must meet to run **VCC Live Desk**.

Hardware Requirements

- **Processor:** Pentium 4, AMD Athlon 64 or newer
- **RAM:** 1 GB RAM for 32-bit (x86), 2 GB RAM for 64-bit (x64)
- **Disk space:** 200 MB free
- **Graphics:** DirectX 9 device with WDDM 1.0 or higher driver
- **Recommended resolution:** 1920 x 1080 px
- **Headset:** wired USB headset

> **Note:** we recommend using wired USB headsets to ensure good sound quality. Before purchasing headsets, make sure that you test the product first or contact our support team regarding this matter.
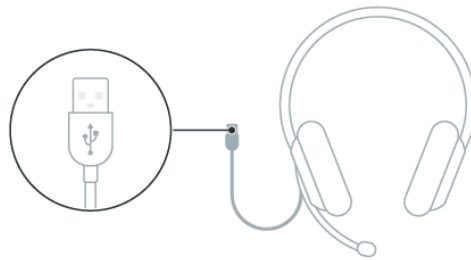
Operating System

- **Microsoft Windows**: 7/8.1/10 or
- **Linux Ubuntu**: on version 14.04, 16.04 (32/64bit)

Internet Connection

A stable internet connection with at least 200 kbps bandwith connection per user is required for business-level voice quality.

> **Note:** connecting via Wi-Fi or mobile data is not recommended.

Firewall Settings

Read about firewall settings in the Firewall Settings section.

Firewall Settings

An overview of firewall settings required for your copy of **VCC Live Desk** to communicate seamlessly with our servers.

source	destination[1]	port	protocol
any	data center IP range	443/TCP	HTTPS
any	data center IP range	5060/TCP, UDP	SIP[2]
any	data center IP range	5061/TCP	SIP-TLS[3]
any	data center IP range	10000-20000/UDP	RTP / SRTP

(1) Use a data center IP range.
(2) Unsecured SIP communication, use a SIP-TLS instead.
(3) If you use a restricted VoIP connection, the 5061 TCP connections need to be opened.

Data Center IP Ranges

data center	IP range
hu1	194.38.106.64/26
hu2	193.68.62.192/26
ke1	62.12.118.64/27
au1	108.61.213.28/32

Example of using hu1 hosting

source	destination	port
any	194.38.106.64/26	443/TCP
any	194.38.106.64/26	5060/TCP, UDP
any	194.38.106.64/26	5061/TCP
any	194.38.106.64/26	10000-20000/UDP

Installing VCC Live Desk

It's a truly effortless experience. A setup wizard leads you through the installation process.

To Download the Installer

1. Visit our download site to download the installer.
2. Select the correct version for your operating system, then press **Download**.

+44 20 863 801 69   info@vcc.live   vcc.live

To Install VCC Live Desk

1. Open the installer file to start the installation.
2. Follow the on-screen instructions, then press **Install**, then **Finish**.
3. You are now ready to log in to VCC Live Desk.

> **Tip:** don't worry about your **VCC Live Desk** becoming outdated. It updates itself automatically every time it starts up.

To Install VCC Live Desk in Active Directory Environment

*   Read about installing the MSI package in the Installing the MSI Package section.

Installing the MSI Package

You can install the **VCC Live Desk** in AD (Active Directory) environment using an MSI (Windows Installer) package, allowing the app to be installed and managed on multiple computers from a central domain.

To Download the MSI Package

1. Visit our download site to download the installer.
2. Select **Windows MSI** from the drop-down list, then press **Download**.

To Prepare Installation

*   Remove **VCC Live Desk** and delete the VCC Live folder from any computer it has been installed on.
    Default location: *C:\Program Files (x86)\Virtual Call Center\Virtual Call Center*
*   Make sure that each computer is logged in within the environment.
*   Copy the MSI package to a network folder available on each target computer.
*   Set a rule that opens the firewall for all target computers to run **VCC Live Desk**.

To Install the MSI Package in an Active Directory Environment

1. Create a Group Policy Object or use an existing GPO to execute the installation.
2. If you create a new GPO rule, first use security filtering to select the appropriate target computer groups, then assign the specific GPO rule to the resulting group structure.
3. Navigate to **Computer Configuration** > **Policies** > **Software Settings** > **Software installation**.

4. Right-click on an empty area, then select **New** > **Package**.

5. Navigate to the copy of the MSI package in the network folder, and select it.

6. A dialog will pop up. Select **Assigned**, then select **OK**.

7. Restart the computers on which the GPO rule is applicable. **VCC Live Desk** will be automatically installed on them.

Tip: don't worry about **VCC Live Desk** becoming outdated. It updates itself automatically every time it starts up.

Note: if after restarting a computer the application is not installed, you can run a *gpupdate* command in the command prompt and restart the computer(s) again. The *gpupdate* command automatically runs periodically on all Windows-based devices , so there is no need to run it if you want to install it immediately.

To Make the Installer Available to a User

1. Create a new GPO rule. Use security filtering to select the target computer groups, then assign the specific GPO rule to the resulting group structure.

2. Navigate to **User Configuration** > **Policies** > **Software Settings** > **Software installation**.

3. Right-click on an empty area, then select **New** > **Package**.

4. Navigate to the copy of MSI Package in the network folder, and select it.

5. A dialog will pop up. Select **Publish**, then select **OK**. Target computers will have their policies updated shortly afterwards.

6. Subsequently, users without admin rights will be able to install **VCC Live Desk**. **VCC Live Desk** will appear as software ready to install by users via **Control Panel** > **Programs** > **Programs and Features** > **Install a program from the network**.

Note: if after restarting a computer the application is not installed, you can run a *gpupdate* command in the command prompt and restart the computer(s) again. The *gpupdate* command automatically runs periodically on all Windows-based devices , so there is no need to run it if you want to install it immediately.

To Set a Firewall Exception to Run VCC Live Desk

1. Create a Group Policy Object or edit an existing GPO.

2. Navigate to **Computer Configuration** > **Windows Settings** > **Security Settings** > **Windows Firewall with Advanced Security** > **Inbound rules**.

3. Add VCC Live as an exception.

Note: when users first open **VCC Live Desk**, the application requests communication through the firewall that users are not authorized to allow. This firewall rule must be added.

Learning the Basics

Login Screen Overview

When you start **VCC Live Desk**, a login screen appears. You need to submit your user name, password and account name for authentication in order to access your data. You can also set the interface's appearance and language.

> **Note:** if you log in as an admin user, you will be presented with the Admin Workspace. If you log in as an agent user, you will be presented with the Project Login Screen.
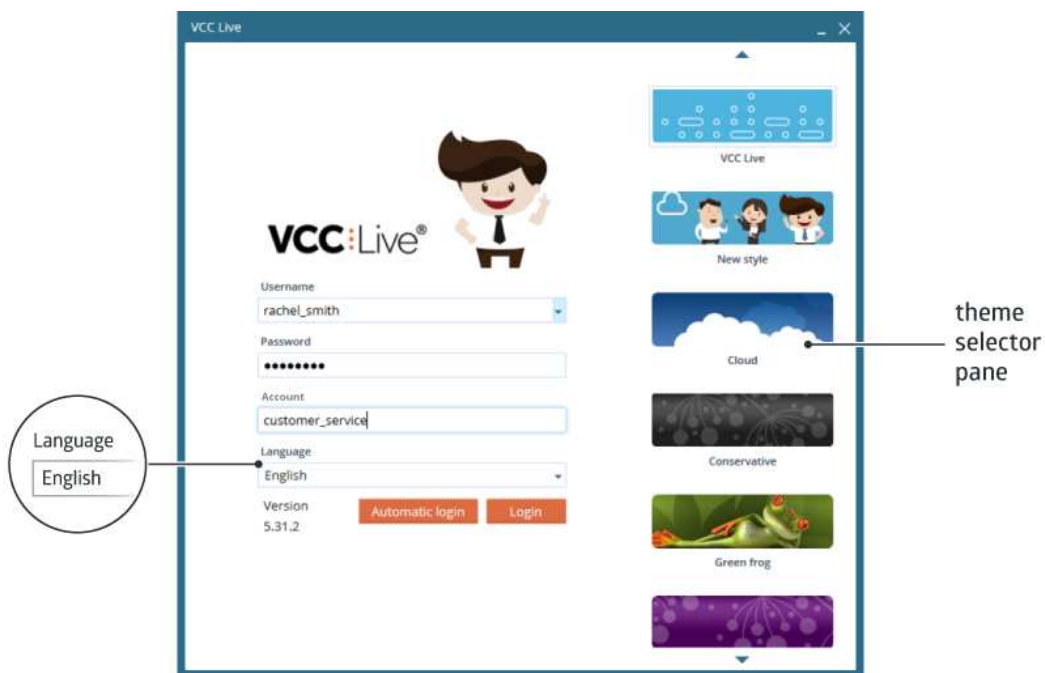
To Change the Appearance

- On the login screen, select a theme you like in the theme selector pane.

To Change the Language

- On the login screen, select **Details >>**, then select a language from the **Language** dropdown list.

Admin Workspace Overview

From the admin workspace, you can manage users, projects, databases, resources, settings and workflow. You can also utilize a number of tools for quality management and advanced script creation.

> **Tip:** read about the agent workspace in the Agent Workspace Overview section.

| name	description
1. VCC Live menu	Access generic settings.
2. Tabs	Use tabs to switch between sets of settings.
3. Taskbar	Taskbar displays which worksheets are open.
4. Project list	A list of your project folders, projects and project specific settings.
5. Worksheet	The interface where you do most of your work.
6. Status bar	A bar displaying various kinds of status information.
7. Search bar	It allows you to search generic settings.
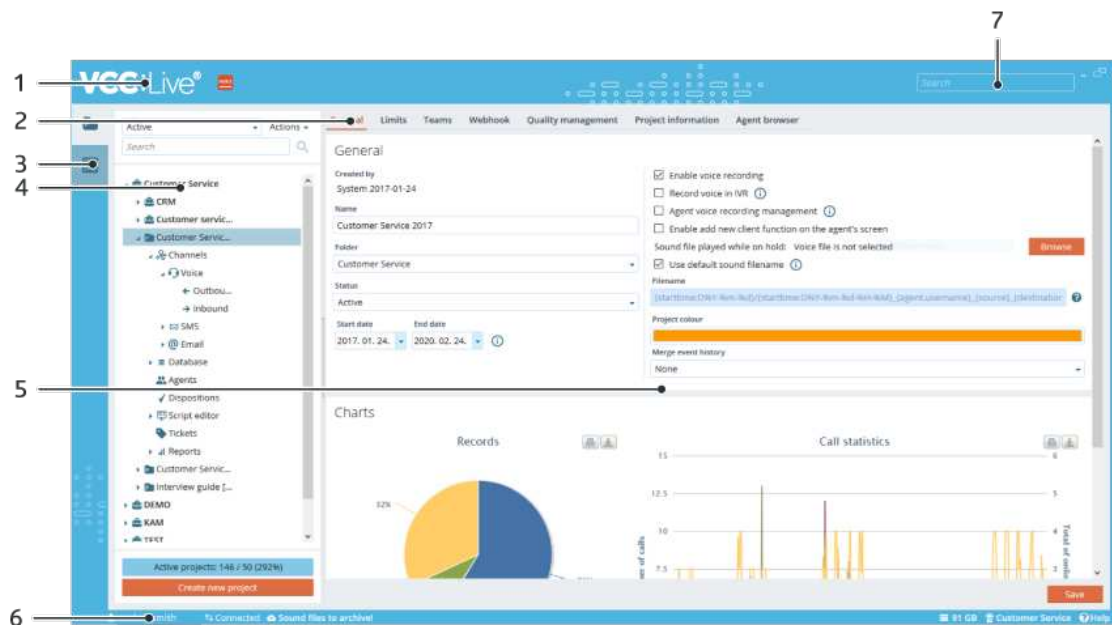
Customizing Local Settings

Local settings allow you to choose what input and output device to use, select the proofing language you need, or choose a default code editor application. Local settings are stored locally on your computer rather than in the cloud.

> **Note:** some settings may not be available when logged in as an agent user.

To Access Local Settings

- From the **VCC Live menu**, select **Tools** > **Local settings**.

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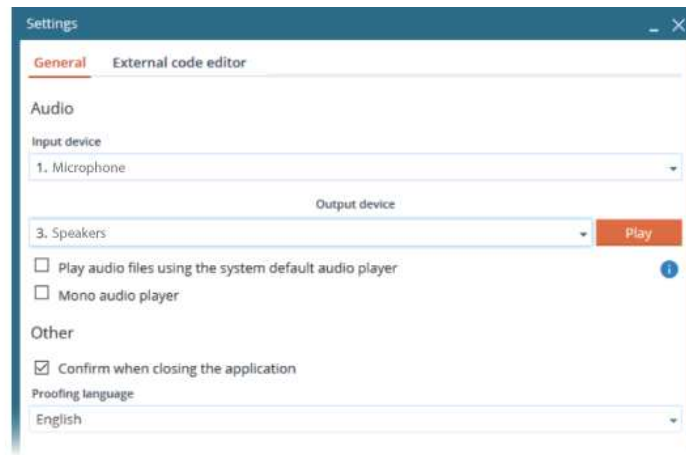
To Select an Input Device

1. From the **VCC Live menu**, select **Tools** > **Local settings**.
2. Select an option from the **Input device** drop-down list.
3. Press **Save**.

To Select an Output Device

1. From the **VCC Live menu**, select **Tools** > **Local settings**.
2. Select an option from the **Output device** drop-down list.
3. Press **Save**.

To Play Voice Files Using the System Default Audio Player

1. From the **VCC Live menu**, select **Tools** > **Local settings**.
2. Mark or unmark the **Play audio files using the system default audio player** checkbox.
3. Press **Save**.

To Select a Default Code Editor Application

1. From the **VCC Live menu**, select **Tools** > **Local settings**, then select the **External code editor** tab.
2. Press **Browse**, then navigate to the code editor application you need. Press **Open.**
3. Press **Save**.

To Set the Proofing Language

- Read about the spell checker function in the Using Spell Checker section.

Editing Your Profile Details

Contact details include your full name, email address and phone number. You are required to fill in this information.

To Edit Your Profile Details

1. From the **VCC Live menu**, select **Profile**.
2. Enter your name, email address and phone number in the appropiate text fields.

3. Press **Save**.

Customizing Notifications

You can request marketing news, technical updates, and information regarding your account balance to be sent to you automatically via email.

To Customize Notifications

1. From the **VCC Live menu**, select **Profile**.
2. In the **Notifications** section, mark or unmark the checkboxes for the type of subjects you wish to receive notifications for.
3. Press **Save**.

Pinning Worksheets

You can pin worksheets to your taskbar. Pinned worksheets remain open even after restarting the application.

To Pin or Unpin a Worksheet

- Right-click the worksheet's icon in the taskbar, then select **Pin worksheet** or **Unpin worksheet**.
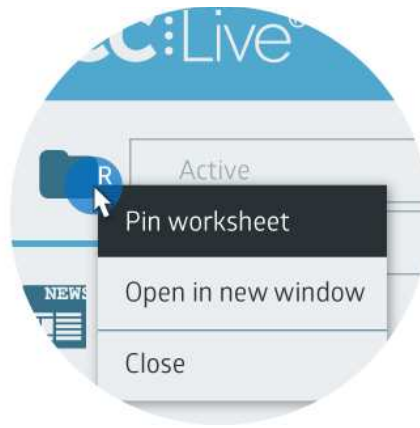
Using Keyboard Shortcuts

Keyboard shortcuts are combinations of two or more keys on your keyboard. They provide quick access to commands that agents would otherwise have to access via the menus, for example, answer and end calls, or start breaks.

To Check Predefined Keyboard Shortcuts

- From the **VCC Live menu**, select **Tools** > **Keyboard shortcuts** to see the available shortcuts.

Using Spell Checker

The spell checker flags words with red wavy underline that may not be spelt correctly.

> **Tip:** right-click on misspelled or non-recognized words to get word suggestions.
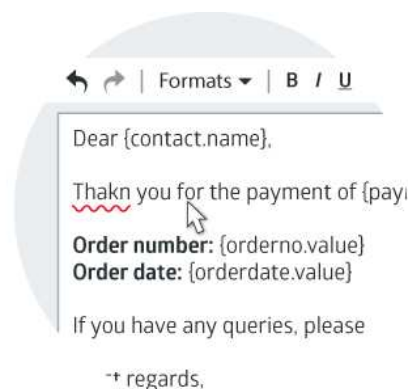
To Select Proofing Language

1. From the **VCC Live menu**, select **Tools** > **Local settings**.
2. Select a language from the **Proofing language** drop-down list.
3. Press **Save**.

To Disable Spell Checker

1. From the **VCC Live menu**, select **Tools** > **Local settings**.
2. Select **Turned off** from the **Proofing language** drop-down list.
3. Press **Save**.

User Management

Managing Users

Create, activate and inactivate users, add users to groups, and modify user settings.

> **Note:** the availability of settings depends on the user's account type or rights settings.
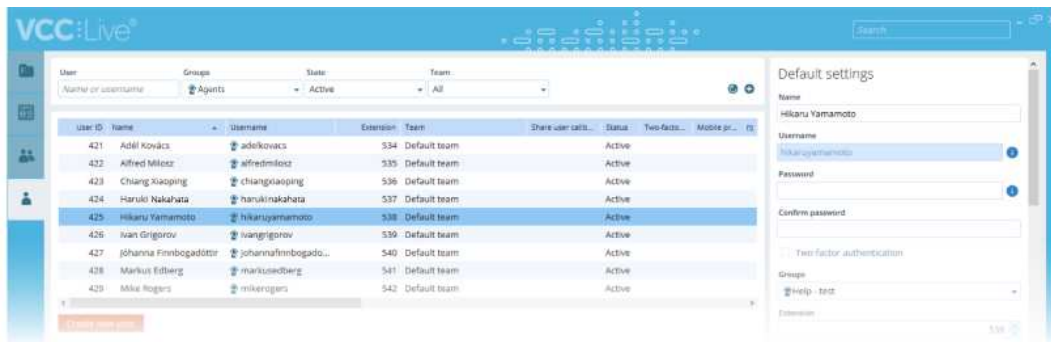
To Create a New User

1. From the **VCC Live menu**, select **User Management** > **Users**, then press **Create new user**.
2. Enter a name, username, and password for the user you wish to create. Select which group the user belongs to.
3. Press **Next**.
4. Select the project the user needs access to and set a skill level, or you can set these later. Press **Finish**.

> **Warning:** once you set a username and user type (admin or agent), you cannot change it. **Note:** one user cannot access both admin and agent interface with the same username, two separate accounts must be created.

To Modify the Name of a User

1. From the **VCC Live menu**, select **User Management** > **Users**, then select a user from the user list.
2. Enter the desired name in the **Name** text field, then press **Save**.

To Activate or Inactivate a User

1. From the **VCC Live menu**, select **User Management** > **Users**, then select a user from the user list.
2. In the **Advanced settings** pane, select **Active** or **Inactive** from the **Status** drop-down list. Press **Save**.

To Add a User to a Group

1. From the VCC Live menu, select User Management > Users.
2. Select a user.
3. In the Default settings pane, select a group from the Groups drop-down list. Press Save.

To Change User Password

1. From the VCC Live menu, select User Management > Users, then select a user from the user list.
2. In the Default settings pane, enter the new password in the Password and Confirm password text fields. Press Save.

To Create a Custom Agent Field

1. From the VCC Live menu, select User Management > Users, then select a user from the user list.
2. A new pane is located below the Default settings pane. Any number of custom text or password fields can be added. For example, if you wish to create *agent_id field*, then you need to use the *{agent.custom.agent_id}* reference.

> Note: the agent.custom.<fieldname> function is only available for clients with VCC Live Premium subscription.

To Disable Two-factor Authentication for a User

1. From the VCC Live menu, select User Management > Users.
2. Select a user.
3. In the Default settings pane, unmark the Two-factor authentication checkbox.

> Note: read about two-factor authentication in the Using Two-factor Authentication section.

To Set Hourly Wage for a User

1. From the VCC Live menu, select User Management > Users.
2. Select a user.
3. Enter a value in the Hourly wage text field. Press Save.

To Set Sample Rate Frequency for a User

1. From the VCC Live menu, select User Management > Users.
2. Select a user.
3. Select an item from the Sample rate frequency drop-down list. Press Save.

To Export User List

1. From the VCC Live menu, select User Management > Users.
2. Press Export, then choose the target location and enter the file name. Press Save.

3. Press **Open** to open the exported file. Press **Open folder** to open the target location.

> **Tip:** you can also copy the list to your clipboard using the **Copy to clipboard** button. It can then be easily inserted into a spreadsheet application, such as Microsoft® Office Excel.

To Assign an Agent to a Project

- Read about this feature in the Assigning Agents to a Project section.

Redistributing Callbacks

If enabled, a user's callbacks will be redistributed among other agents while the user is out of office, so that the user does not need to be removed from the project.

To Enable or Disable Callback Redistribution

1. From the **VCC Live menu**, select **User Management** > **Users**.
2. Select a user, then mark or unmark the **Enable callback distribution** checkbox.
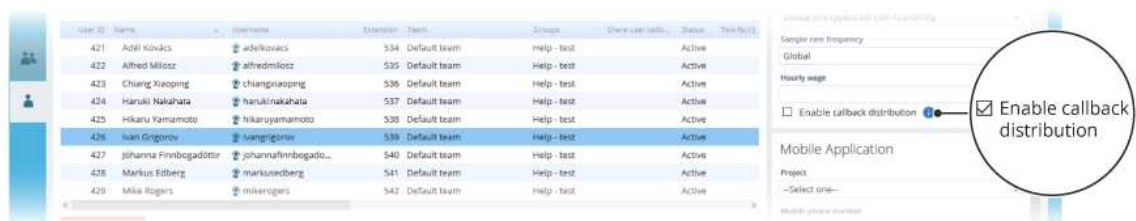
Managing Teams

You can create teams and add users to them as required, letting you manage sets of users in one go rather than managing them individually. This allows you, for example, to quickly assign a project to a team.

To Create a Team

1. From the **VCC Live menu**, select **User Management** > **Teams**, then press ➕ .
2. Enter team name, then press **OK**.
3. From the **Users** column, drag a user, then drop it to the **Users added to this team** column. Changes are automatically saved.

To Search Teams

1. From the **VCC Live menu**, select **User Management** > **Teams**.
2. Enter a name in the search field.

Managing User Right Groups

You can create user right groups and add users to them, allowing you to define what functions supervisors and agents have access to.

> **Tip:** there are four default user right groups: admin, supervisor, wallboard, and agent.

To Compare User Right Groups

- Press and hold the ctrl key on your keyboard, then select the user right groups you want to compare.

To Create User Right Groups

1. From the **VCC Live menu**, select **User Management** > **Rights**.
2. Press **Actions**, then select **Add**.
3. Enter a name for your group.
4. Select a group type, depending on the type of user account members you wish to add.

To Clone a User Right Group

1. From the **VCC Live menu**, select **User Management** > **Rights**.
2. Select a group.
3. Press **Actions**, then select **Copy group**.
4. Enter a name for your group, then press **Copy**.

To Delete User Right Groups

1. From the **VCC Live menu**, select **User Management** > **Rights**.
2. Select a group from the **Supervisor user right groups** or **Agent user right groups** column.
3. While keeping your cursor over the selection, press 🗑 , then press **Yes**.

To Add or Remove Rights

1. From the **VCC Live menu**, select **User Management** > **Rights**.
2. Select a group from the **Supervisor user right groups** or **Agent user right groups** column.
3. In the **Rights** pane, mark or unmark the checkboxes as desired.

> **Tip:** you can filter for a specific right using the **Search rights** searchbox.

To Restrict Access based on IP Address

Read about this feature in the Restricting Access based on IP Address section.

Changing Agent Status

You can change agent status, for example, from available to on break.

To Change Agent Status

1. From the **VCC Live menu**, select **Monitoring** > **Real-time monitoring**.
2. In the **Users** pane, select one or more users using the checkboxes.
3. Select a status from the **Change status** drop-down list. This changes the status of the selected users.

> **Note:** if an operator is on a call, status changes take effect only when the call and any related afterwork is completed.

Customizing Break Codes

You can create break codes that agents use to indicate when they are taking breaks. You can also regulate how many or what percentage of agents can be on a break at the same time.

> **Tip:** use break codes such as *10 minute break*, *lunch*, *training*, etc. Use of break codes can be monitored in the Real-time Statistics window.

To Access Break Codes

- From the **VCC Live menu**, select **Contact Center** > **Break codes**.

To Create a New Break Code

1. From the **VCC Live menu**, select **Contact Center** > **Break codes**, then press **Add new aux**.
2. Enter a name in the **Name** text field.
3. Select one or more agent groups who you wish to create the break code for.
4. Mark the **Visible** checkbox to make the break code visible.
5. Set the soft and hard limits.
6. Set the agent and aux limit.
7. Press **Create aux**.

> **Note:** break codes can be assigned to User Right Groups.

To Delete a Break Code

1. From the **VCC Live menu**, select **Contact Center** > **Break codes**.
2. While keeping your cursor over a break code, press 🗑 .
3. Press **Yes**.

Enabling Agents to Use the Mobile App

You can specify which phone number the **VCC Live App** mobile app user can be reached on, as well as which project calls handled via the mobile application are registered.

To Set Up VCC Live App for a User

1. From the **VCC Live menu**, select **User Management** > **Users**.
2. Select a user you want to set up **VCC Live App** for.
3. In the **Mobile Application** pane, select a project from the **Project** drop-down list.
4. Enter the phone number of the mobile device **VCC Live App** is installed on.
5. Press **Save**.
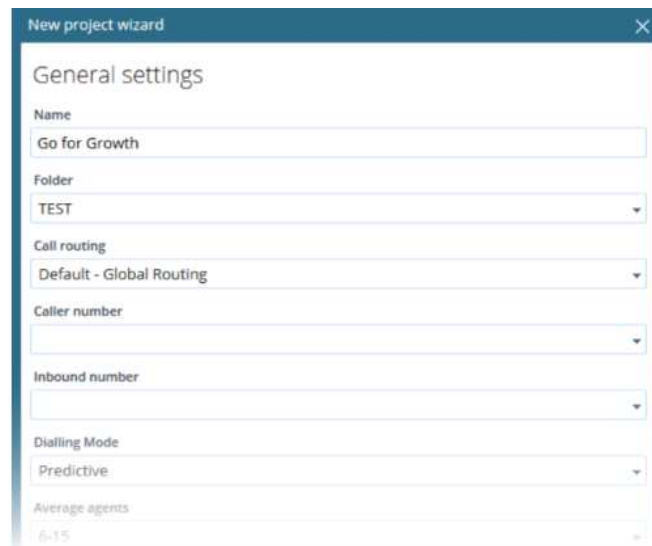
> **Note:** calls handled via the mobile app are logged in the project you select.

Project Management

Creating a New Project

The **New project wizard** presents a sequence of dialog boxes that takes you through the process of creating a new project.

> **Tip:** you can create folders to organize your projects in the project list.

To Create a Project

1. From the **VCC Live menu**, select **Contact Center** > **Projects**.
2. Press **Actions**, then select **Create a new project**. The **New project wizard** appears.
3. Follow the on-screen instructions.

Field name	Explanation
Name	Name of your project.
Folder	The folder in which your organize your projects in the project list.
Outbound number	The phone number you make calls with during an outbound project.
Inbound number	The phone number customers can reach your contact center on during an inbound project.
Average agents	Only available in Predictive dialing mode. The number of average agents assigned to the project.
Project colour	The colour of the header in the agent's script interface.

Dialing Modes

- Read about dialing modes in the Dialing Modes section.

To Assign an Agent to a Project

- Read about this feature in the Assigning Agents to a Project section.

Modifying Generic Project Settings

You can easily modify and customize your projects.

> **Note:** a project list is normally visible by default. If the list is not visible, you need to open it.

To Access Projects

- From the **VCC Live menu**, select **Contact Center** > **Projects**.

To Open a Project in a New Tab

- Right-click a project, then select **Open project in new tab**.

To Rename a Project

1. Select a project from the project list, then select the **General** tab.
2. In the **General** pane, enter a new name in the **Name** text field. Press **Save**.

To Set a Start and End Date for a Project

1. Select a project from the project list, then select the **General** tab.
2. In the **General** pane, set the desired start and end date. Press **Save**.

> **Note:** any other project with dates outside the time period you set will not be visible to agents. Callbacks outside this time period can also not be set. Projects with an expired end date are marked with a ⚠️ icon.

To Activate or Deactivate a Project

1. Select a project from the project list, then select the **General** tab.
2. In the **General** pane, select **Active** or **Inactive** from the **Status** drop-down list. Press **Save**.

To Assign a Project Folder

1. Select a project from the project list, then select the **General** tab.
2. In the **General** pane, select a folder from the **Folder** drop-down list. Press **Save**.

To Enable or Disable Call Recording

- Read about call recording in the Downloading and Listening to Call Recordings section.

To Set up a Project-Specific Webhook

- Read about **VCC Live Webhook** in the Setting up Webhook section.

Deleting a Project

You can delete projects.

To Delete a Project

- Right-click a project, then select **Actions** > **Delete project**.

> **Note:** only inactive projects can be deleted. Read about activating and deactivating projects in the Modifying Generic Project Settings section.

Cloning a Project

You may need to create projects based on an existing project. You can do this by cloning a project.

To Clone a Project

- Right-click a project, then select **Actions** > **Clone project**.

To Add a Project Note

1. Select a project from the project list, then select the **Project information** tab.
2. Enter the note in the textbox, then press **Save**. The note appears when you are cloning a project.

Mass Project Actions

Mass Project Actions allows you to delete, activate or inactivate multiple projects at once.

To Activate or Inactivate Multiple Projects

1. From the **VCC Live menu**, select **Contact Center** > **Mass project actions**.
2. Specify criteria to filter for projects you want to process. Press **Search**.
3. Mark the checkboxes for the projects you wish to inactivate or activate, then press either **Inactivate project** or **Activate project**.

To Delete Multiple Projects

1. From the **VCC Live menu**, select **Contact Center** > **Mass project actions**.
2. Specify criteria to filter for projects you want to process. Press **Search**.
3. Mark the checkboxes for the active projects you want to delete, then press **Delete project**.

Mass Export Project Data

Export data from multiple projects, including dispositions used across several projects.

To Create a Mass Export

1. From the **VCC Live menu**, select **Contact Center** > **Mass export**.
2. Select a project, then press **Select dispositions**.
3. Select time intervals and dispositions you want to include.
4. In the middle column, set the criteria for your database export, then press **Export**.

> **Note:** mass exports can only be performed using export patterns.

Project Specific Settings

Assigning Agents to a Project

You can assign teams or individual agents to a project.

To Assign an Agent to a Project

1. Select a project from the project list, then select **Agents**.
2. Double-click or drag and drop an agent from the **Agents** pane to the **Agents on the project** pane.
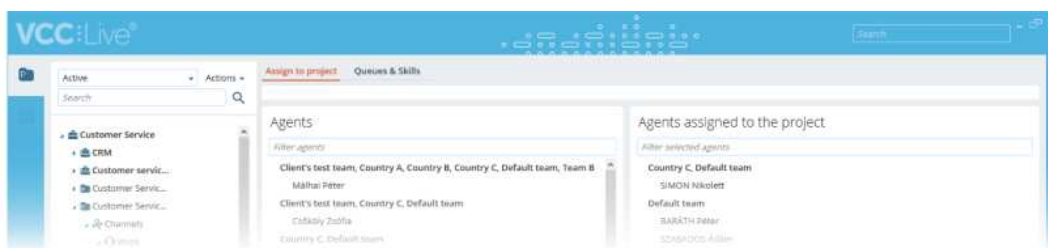
To Assign a Team to a Project

1. Select a project from the project list, then select the **Teams** tab.
2. Double-click or drag and drop a team from the **All Teams** pane to the **Added** pane.

To Remove an Agent from a Project

1. Select a project from the project list, then select **Agents**.
2. Double-click or drag and drop an agent from the **Agents on the project** pane to the **Agents** pane.

> **Warning:** after removing an agent from a project, all of the agent's callbacks are redistributed among other agents in the project.

To Assign an Agent to a Queue

Read about queue assignment in the Assigning Agents to a Queue section.

Assigning Agents to a Queue

You can assign agents to queues, and also customize the way in which the system distributes calls to agents, including which agent should be prioritized.

To Assign an Agent to the Inbound Queue

1. Select a project from the project list, select **Agents**, then select the **Queues & Skills** tab.
2. Select a level in the **queue agent** column.
3. Press **Save**.

To Assign an Agent to the Chat Queue

1. Select a project from the project list, select **Agents**, then select the **Queues & Skills** tab.
2. Select a level in the column.
3. Press **Save**.

Managing Dispositions

When a call ends, agents can add a disposition to a record to indicate the result of the call.

To Access Dispositions

1. Select a project from the project list, then select **Dispositions**.

To Add a New Disposition

1. Select a project from the project list, then select **Dispositions**.
2. Press **Add new disposition**.
3. Enter a name and set the desired settings.
4. Press **Add disposition**.

To Modify a Disposition

1. Select a project from the project list, then select **Dispositions**.
2. Select a disposition you want to modify, then make the changes.
3. Press **Modify disposition**.

Managing Robinson Lists

The Robinson list is an opt-out list of contacts who do not wish to receive calls from a contact center. When an agent terminates a call with a Robinson disposition, the number is added to the Robinson list. When an agent attempts to call a record that is on the Robinson list, the system, depending on your settings, terminates the call with a Discard (Robinson) disposition. You can also add numbers manually to the Robinson list.

To Select Project Default Robinson List

1. Select a project from the project list, then select **Channels** > **Voice** > **Outbound**.
2. Select an option from the **Robinson list** drop-down list. This will be the project's default Robinson list.
3. Press **Save**.

To Add Numbers to the Default Outbound Robinson List

1. From the **VCC Live menu**, select **Contact Center** > **Global settings**.
2. On the **Robinson list** tab, select **Default Phone Out**.
3. In the **Manage Robinson list** pane, enter phone numbers in the field. Press **Add identifiers**. The dialer will not dial this phone number.

To Allow or Forbid Agents to Call Robinson List Records

1. Select a project from the project list, then select **Channels** > **Voice** > **Outbound**.
2. In the **Dialing settings** pane, mark or unmark the **Calling Robinson list numbers** checkbox.
3. Press **Save**.

> **Note:** this function works only in manual dialing projects.

Setting up After-work Limits

You can set up after-work limits. If an agent is in an after-work state and reaches or exceeds the limit, the system warns the user.

To Set Up a Global Afterwork Limit

1. From the **VCC Live menu**, select **Contact Center** > **Global settings**.
2. On the **Project settings** tab, enter the timer, as well as soft and hard limit values.
3. Press **Save**.

To Set Up a Project-specific Afterwork Limit

1. Select a project from the project list, then select the **Limits** tab.
2. In the **Afterwork limits** pane, unmark the **Use default limits for afterwork** checkbox.
3. Select an option from the **What happens when the hard limit is reached** drop-down list to define the result of exceeding limits.
4. Set the limit values.
5. Press **Save**.

Adding Web Pages for Agents

You can add up to 10 websites to the agent browser, that can be accessed by agents after they log in. This browser is available to agents whether they are in a call or not.

> **Tip:** we recommend you add websites that provide useful information to agents, such as a company home page, browser-based CRM system or web-mapping service.

To Add Web Pages to the Agent Browser

1. Select a project from the project list, then select the **Agent browser** tab.
2. Press **New**. A new row appears with a text field.
3. Enter the URL address of the website you want to add.
4. Press **Save**.

To Remove a Web Page from the Agent Browser

1. Select a project from the project list, then select the **Agent browser** tab.
2. Press **x** beside the row you want to remove.
3. Press **Save**.

To Use Variables in the URL

1. Select a project from the project list, then select the **Agent browser** tab.
2. Select a web page URL you want to edit. You can use the following variables in the URL:

   - {agent.username}
   - {agent.id}
   - {project.id}
   - {agent.custom.<fieldname>}

> **Note:** the {agent.custom.<fieldname>} variable can only be used if you use custom fields. Read about custom fields in the Managing Users section.

Communication Channels

Outbound Calls

Customize your outbound calls settings, including dialing mode, call interruption handling, and more.

To Access Outbound Settings

- Select a project from the project list, then select **Channels** > **Voice** > **Outbound**.

To Select Dialing Mode

1. Select a project from the project list, then select **Channels** > **Voice** > **Outbound**.
2. Select an option from the **Dialer mode** drop-down list.
3. Press **Save**.

> **Note:** read about dialing modes in the Dialing Modes section.

To Select Disposition when a Call is Interrupted

1. Select a project from the project list, then select **Channels** > **Voice** > **Outbound**.
2. Select a disposition from the **Disconnected during call** drop-down list.
3. Press **Save**.

To Allow or Forbid Agents to Call Robinson List Records

- Read about Robinson lists in the Managing Robinson Lists section.

To Customize Dialing Preferences

1. Select a project from the project list, then select **Channels** > **Voice** > **Outbound**.
2. Set the desired settings in the **Dialing settings** pane. Setting descriptions are described below.
3. Press **Save**.

> **Note:** this function works only in manual dialing projects.

Call list type	Description
New clients	Number of new clients to display.
Agent's callbacks	Number of callbacks to display.
Shared callbacks	Number of shared callbacks to display.
Other clients	Number of other clients to display.
Answering machine	Number of records to display where an answering machine answered the call.

Dialing behavior	Description
Show callbacks (m)	Time to wait before callbacks are back on the call list (in minutes).
Callbacks on a primary project	If enabled, agents can receive callbacks from non-primary projects.
Search	If enabled, agents can search call lists. Only in manual dialing mode.
Automatic dial in prework	If enabled, you can specify how long agents are in a pre-work state before call is initiated. Value can be set in the **Timeout (s)** number field.

Inbound Calls

Customize your inbound calls settings, such as phone numbers used, SLA (service-level agreement) and automatic answer. You can also customize your inbound processes in detail, including IVR (interactive voice response), call forwarding, voice file playback, virtual queuing, and more.

To Access Inbound Settings

- Select a project from the project list, then select **Channels** > **Voice** > **Inbound**.

To Set Up Inbound Processes

1. Select a project from the project list, then select **Channels** > **Voice** > **Inbound**.
2. On the **Actions** tab, press **Actions**, and select the items you want to add to your inbound process.
3. Select an item that is already added to your process.
4. The item's properties are located on the right. Set the desired settings.
5. Press **Apply inbound changes**.

> **Note:** read about processes you can add in the Inbound Processes section.

To View All Inbound Processes

- From the **VCC Live menu**, select > **Inbound processes**.

To Specify Phone Numbers Used

1. Select a project from the project list, then select **Channels** > **Voice** > **Inbound**.
2. Select the **Phone number** tab.
3. Select, then drag and drop the phone numbers you want to use in your inbound project to the **Selected** column.

> **Note:** you cannot use the same phone number in multiple projects. If you remove a phone number from an inbound project, callers won't be able to reach your contact center.

To Set SLA Time

1. Select a project from the project list, then select **Channels** > **Voice** > **Inbound**.
2. Select the **Settings** tab.
3. Enter a value in the **SLA value (sec)** number field.

> **Note:** SLA is used for call statistics and logs.

To Enable or Disable Automatic Answer

1. Select a project from the project list, then select **Channels** > **Voice** > **Inbound**.
2. Select the **Settings** tab.
3. Mark or unmark the **Automatic answer** checkbox.

To Make a Test Call

1. Select a project from the project list, then select **Channels** > **Voice** > **Inbound**.
2. Select the **Test call** tab.
3. Enter any phone number in the **Caller number**.
4. Select an inbound phone number in the **Called number** drop-down list.
5. Press **Test call**. You can simulate pressing DTMF keys using the **DTMF** text field. Inbound process stages are shown on the right.

SMS

You can send and receive short text messages using SMS (Short Message Service). Sending SMS-based text messages can be triggered by terminating a record with a disposition.

> **Note:** an SMS-based text message can contain up to 160 alpha-numeric characters.

To Create an SMS Template

1. Select a project from the project list, then select **Channels** > **SMS**.
2. Press **Add new SMS template**.
3. Enter the name of the template in the **Template name** text field.
4. Enter a phone number or select a database field in the **To** drop-down list to set the recipient.
5. Select a phone number from the **Sender** drop-down list. This number is displayed as the sender to the recipient.
6. Set when you want your text message to be sent in the **Send date** text field. You can schedule your message to be sent later by adding a reference to a date database field, or select **Send now** to send the message immediately.
7. If it is not marked, mark the **Active** checkbox.
8. In the **Dispositions** pane, mark the checkbox beside one or more dispositions. When agents use these dispositions, the SMS is sent automatically.
9. Select the **Message** tab, then enter the desired message.
10. Press **Save**.

To Activate or Inactivate an SMS Template

1. Select a project from the project list, then select Channels > SMS.
2. Press ▶ to see your SMS templates list, then select a template.
3. Mark or unmark the Active checkbox.
4. Press Save.

To Delete an SMS Template

1. Select a project from the project list, then select Channels > SMS.
2. Press ▶ to see your SMS templates list.
3. Hover your mouse over the template you want to delete, then press 🗑 .

To Read All SMS Sent

- Read about this feature in the SMS Log section.

Email

You can send and receive email (electronic mail) messages. There are options to send both personalized mass emails and disposition triggered emails.

To Modify Generic Email Settings

1. Select a project from the project list, then select Channels > E-mail.
2. Confirm the desired settings.
3. Press Save.

To Create an Email Template

1. Select a project from the project list, then select Channels > E-mail.
2. Press Add new email template.
3. Enter the name of the template in the Template name text field.
4. Enter a subject.
5. Enter an email address or select a database field in the Recipient drop-down list to set the recipient.
6. Enter one or more email addresses in the CC and BCC text fields if required.
7. Enter or select an email address from the Sender drop-down list. This address is displayed as the sender to the recipient.
8. If it is not marked, mark the Active checkbox.
9. Select the Message tab, then enter and format the desired message, or enrich it with image and video.
10. Select the Attachment tab to insert an attachment.
11. Press Save.

To Test an Email Template

1. Select a project from the project list, then select Channels > E-mail.
2. Press ▶ to see your email templates list, then select a template.
3. On the General tab, enter an email address in the text box beside the Save and send test email button, then

press the button.

To Modify Disposition-triggered Email Settings

1. Select a project from the project list, then select **Channels** > **E-mail**.
2. Press ▶ to see your email templates list, then select a template.
3. Select the **Disposition-triggered email sending** tab, then set the desired settings. The system adds the selected dispositions to each record based on response.
4. In the **Dispositions** pane, mark the checkbox beside one or more dispositions. When agents use these dispositions, the email is sent automatically.
5. Press **Save**.

To Modify Mass Email Settings

1. Select a project from the project list, then select **Channels** > **E-mail**.
2. Press ▶ to see your email templates list, then select a template.
3. Select the **Mass email sending** tab, then set the desired settings.
4. Set the desired settings. The system adds the selected dispositions to each record based on response.
5. Press **Save**.

To Activate or Inactivate an Email Template

1. Select a project from the project list, then select **Channels** > **E-mail**.
2. Press ▶ to see your email templates list, then select a template.
3. Mark or unmark the **Active** checkbox.
4. Press **Save**.

To Delete an Email Template

1. Select a project from the project list, then select **Channels** > **E-mail**.
2. Press ▶ to see your email templates list.
3. Hover your mouse over the template you want to delete, then press 🗑 .

To View an Email Log

- Read about viewing email logs in the Email Log section.

Chat

Chat allows your clients and agents to communicate in real time on your website, using an easy-to-embed chat interface.

To Add Chat to your Website

1. Select a project from the project list, then select **Channels** > **Webchat (Beta)**.
2. Copy the content from the **Webchat plugin code** field to your website.

> **Note:** you may need to contact your webmaster to add the code to your website.

To Send Chat Transcript to an Email

1. Select a project from the project list, then select **Channels** > **Webchat (Beta)**.
2. Enter an email address in the **Transcript email**. When an agent closes the chat, the transcript is sent to the email address.
3. Press **Save**.

To Customize Chat Greeting

1. Select a project from the project list, then select **Channels** > **Webchat (Beta)**.
2. Enter your chat greeting in the **Welcome message** text field. When your website visitor opens the chat, the greeting is displayed.
3. Press **Save**.
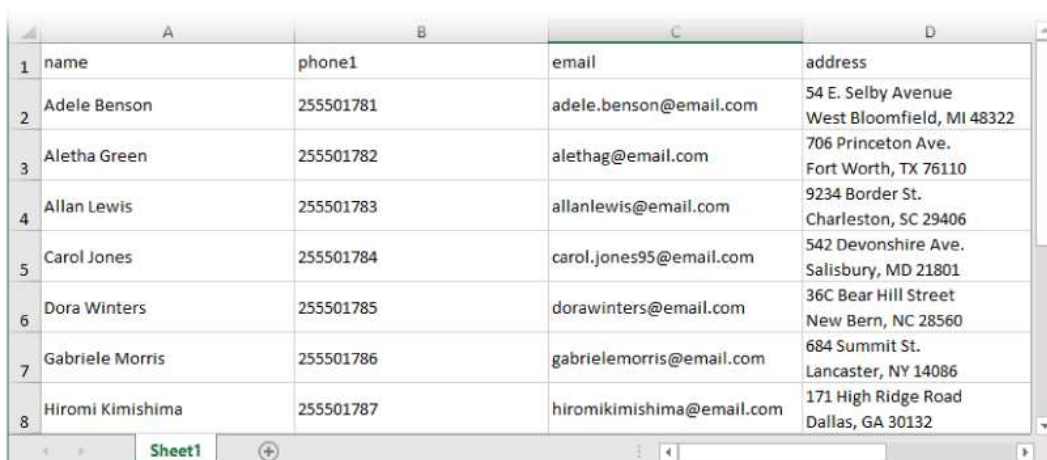
Database Management

Importing Records

You can import records from a spreadsheet file in either CSV or TXT format into your database. Records consist of fields, each of which contains a single or multiple parameters as well as text.

To Prepare a File to Import

1. Open a spreadsheet application, such as Microsoft® Office Excel.
2. Enter field names in the first row, each in a separate column. "name" and "phone1" fields are mandatory.
3. Enter your records below the first row, one record per row.
4. Save your file as a CSV or TXT file.

	A	B	C	D
1	name	phone1	email	address
2	Adele Benson	255501781	adele.benson@email.com	54 E. Selby Avenue West Bloomfield, MI 48322
3	Aletha Green	255501782	alethag@email.com	706 Princeton Ave. Fort Worth, TX 76110
4	Allan Lewis	255501783	allanlewis@email.com	9234 Border St. Charleston, SC 29406
5	Carol Jones	255501784	carol.jones95@email.com	542 Devonshire Ave. Salisbury, MD 21801
6	Dora Winters	255501785	dorawinters@email.com	36C Bear Hill Street New Bern, NC 28560
7	Gabriele Morris	255501786	gabrielemorris@email.com	684 Summit St. Lancaster, NY 14086
8	Hiromi Kimishima	255501787	hiromikimishima@email.com	171 High Ridge Road Dallas, GA 30132

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To Import Records

1. Select a project from the project list, then select **Database** > **Import**.

2. Select **Actions** > **Import**.

3. An import wizard window pops up. Navigate to the CSV or TXT file you want to import and select it. Press**Open**.

4. Optional: if you want to import phone numbers with only a specific prefix, then mark the
   Show warning message if imported phone numbers do not match this prefix checkbox, and enter a prefix in the text field.

5. Press **Next**.

6. Mark or unmark the checkbox beside the fields you want to import. Select field types. Press **Next**.

7. If duplicated phone numbers or invalid values are found, you can select one of a number of options to deal with them.

To Download Records

1. Select a project from the project list, then select **Database** > **Import**.

2. Select a file, then select **Actions** > **Download**.

3. Navigate to the folder you want to save your file in, then press **Save**.

To Withdraw Records

1. Select a project from the project list, then select **Database** > **Import**.

2. Select a file you want to withdraw, then select **Actions** > **Withdraw import**.

3. Press **Yes**.

> **Note:** you can only withdraw records that were not used, for example, an agent has not contacted the record.

Exporting Database

You can filter and export records from your database.

To Export your Complete Database

1. Select a project from the project list, then select **Database** > **Export**.

2. Press **Export** to save the exported data as a CSV or TXT file, or press **Copy to clipboard** to copy it to your clipboard.

> **Note:** exporting a large database may take a while.

To Export Records with Selected Dispositions

1. Select a project from the project list, then select **Database** > **Export**.

2. In the **Dispositions** pane, select one or more dispositions. Only records terminated with the selected dispositions will be exported.

3. Press **Export** to save the output as a CSV or TXT file, or press **Copy to clipboard** to copy it to your clipboard.

To Export Records from a Specific Time Period

1. Select a project from the project list, then select **Database** > **Export**.
2. In the **Filtering** pane, set an option from the **Filtering records by date** drop-down list.
3. Set the **From date** and **To date** date picker controls.
4. Press **Export** to save the output as a CSV or TXT file, or press **Copy to clipboard** to copy it to your clipboard.

Updating Databases

You can mass update your database records.
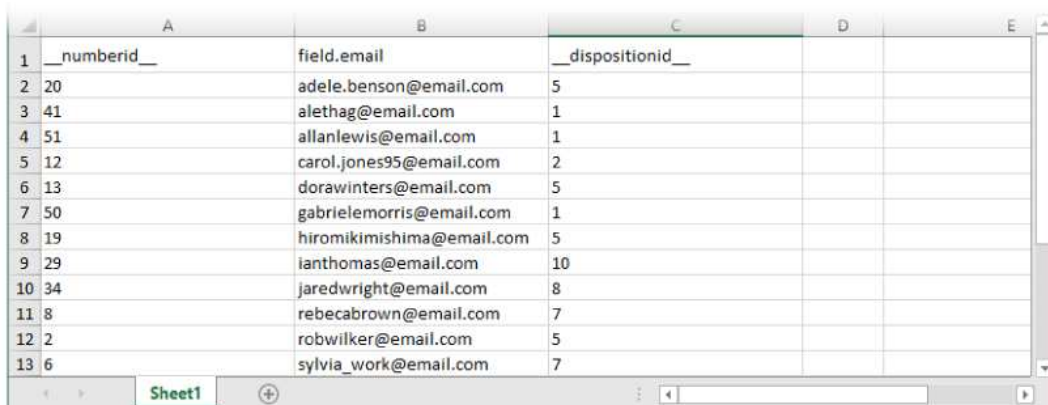
Field Categories and Types

Read about field categories and types in the Managing Fields section.

To Prepare a Database Update File

1. Open a CSV or TXT file containing your records in a spreadsheet application, such as MicrosoftÂ® Office Excel.
2. Select a full column (representing a field in the database) that you want the system to recognize as an identifier, and cut and insert it as the first column. This tells the system which records you want to update. If it is a system field, then you need to insert two underscores (__) at the beggining and end of the field name. If it is a project field, no additional characters are needed.
3. The second and other columns contain the fields that you update. If it is a system field, then you need to insert two underscores (__) at the beggining and end of the field name. If it is a project field, then you need to insert (field.) at the beginning of field name.
4. Make your changes to the field values as required.
5. Save your file in a CSV or TXT format.

> **Tip:** if you want to update single parameter or multiple parameter fields, value IDs must be used instead of names. Multiple values separator is a vertical bar: |.

	A	B	C	D	E
1	__numberid__	field.email	__dispositionid__		
2	20	adele.benson@email.com	5		
3	41	alethag@email.com	1		
4	51	allanlewis@email.com	1		
5	12	carol.jones95@email.com	2		
6	13	dorawinters@email.com	5		
7	50	gabrielemorris@email.com	1		
8	19	hiromikimishima@email.com	5		
9	29	ianthomas@email.com	10		
10	34	jaredwright@email.com	8		
11	8	rebecabrown@email.com	7		
12	2	robwilker@email.com	5		
13	6	sylvia_work@email.com	7		

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To Update your Database

1. Select a project from the project list, then select **Database** > **Import**.
2. Select **Actions** > **Update database**.

3. An update wizard window pops up. Navigate to the CSV or TXT file you want to import and select it. Press Open.

4. Select one or more dispositions. Only records terminated with the selected dispositions will be updated.

5. Press Next, then Finish.

Searching Records

You can view and search records in your project.

To Search Records

1. Select a project from the project list, then select Database > Records.

2. Select a field from the drop-down list, then enter the word or number you want to search for.

3. Press 🔍 , or press 🔽 for more search options.

To Export Search Results

1. Select a project from the project list, then select Database > Records.

2. Select a field from the drop-down list, then enter the word or number you want to search for.

3. Press 🔍 , or press 🔽 for more search options.

4. Press Export to save search results as a CSV or TXT file, or press Copy to clipboard to copy it to your clipboard.

Managing Records List

View, search and mass modify records in your project.

To Mass Modify Agents Assigned to Records

1. Select a project from the project list, then select Database > Records list.

2. Set your search criteria via the General filter parameters or Extended filter parameters tabs.

3. Press Search.

4. Select Actions, then select Agent modification.

5. Select agent you want to assign to the records, then press Save.

To Mass Modify Disposition Set to Records

1. Select a project from the project list, then select Database > Records list.

2. Set your search criteria via the General filter parameters or Extended filter parameters tabs.

3. Press Search.

4. Select Actions, then select Disposition modification.

5. Select agent and disposition, then press Save.

To Mass Modify Field Values in Records

1. Select a project from the project list, then select Database > Records list.

2. Set your search criteria via the General filter parameters or Extended filter parameters tabs.

3. Press Search.

4. Select Actions, then select Mass value update.

5. Select the fields you want to update, select values, then press Save.

To Set Records as New

1. Select a project from the project list, then select **Database** > **Records list**.
2. Set your search criteria on the **General filter parameters** or **Extended filter parameters** tabs.
3. Press **Search**.
4. Select **Actions**, then select **As new**.
5. Press **Yes**.

Managing Fields

Fields contain the database column names and are created automatically when you import a database file. You can also import them manually. The system automatically adds unique ID numbers to each field.

Field Categories

Field category	Description
System field	A default, system-generated field.
Project field	A manually-created or imported field.
Index field	Any index field inserted as the first column in a database update file. It tells the system which records you want to update.

Field Types

Field type	Description
Text	This type of fields can contain alphanumeric characters, for example, the record's name or address.
Simple	This type of fields can contain multiple items (alphanumeric characters), but the agent can only select a single item.
Multiple	This type of fields can contain multiple items (alphanumeric or numeric characters), and the agent can select more than one item.

To Import Fields

1. Select a project from the project list, then select **Database** > **Fields**.
2. Select **Actions** > **Import fields and values**.
3. An import wizard window pops up. Navigate to the CSV or TXT file you want to import and select it. Press**Open**.
4. Press **Next**, then press **Finish**.

> **Note:** a fields import file must contain **name**, **type**, and **value** column names.

	A	B	C	D	E	F	G	H	I
1	name	label	type	value	export_value	description			
2	address	Address	text						
3	birthday	Day of birth	text						
4	birthmonth	Month of birth	text						
5	birthyear	Year of birth	text						
6	city	City	simple	Tokyo	a1				
7				Kyoto	a2				
8				Yokohama	a3				
9				Nagoya	a4				
10	email	Email	text						
11	gender	Gender	simple	Female					
12				Male					
13	calldate	Callback date		2017.10.10		Tuesday			
14				2017.10.11		Wednesday			
15				2017.10.12		Thursday			

Sheet1　⊕

To Manually Create a New Field

1. Select a project from the project list, then select **Database** > **Fields**.
2. Select **Create new field**.
3. Enter the **Unique identifier**.
4. Enter the **Label**. This is the field name that the agent will see.
5. Select a field type in the **Type** drop-down list.
6. Press **Create field**.

To Modify Field Type (Text, Simple, Multiple)

1. Select a project from the project list, then select **Database** > **Fields**.
2. Select an existing field, then select a field type in the **Type** drop-down list.
3. Press **Create field**.

> **Note:** when using a multiple-value type field in a script, it needs to contain a control that allows for the selection of multiple values. Read about controls you can add in the Types of Controls section.

To Add a Single Value to a Field

1. Select a project from the project list, then select **Database** > **Fields**.
2. Select an existing field, then select **One value** tab in the right column.
3. Enter a name for the value in the **Name** text field.
4. Enter an **Export value**. When you export the fields database, this will substitute the field values.
5. Enter a **Description**, and **Call center commission**.
6. Press **Add values**.

To Add Multiple Values to a Field

1. Select a project from the project list, then select **Database** > **Fields**.
2. Select an existing field, then select the **Multiple values** tab in the right column.

3. Enter a value name and export value, separated by a vertical bar character. Enter the next value in the next line.

4. Press **Add values**.

> **Tip:** using export values can be beneficial when you use complete words as a field value, but export the fields into a database that, for example, cannot handle characters with accents.

Single value   Multiple values

value name ——————— Check | check ——————— export value
Cash on Delivery | cash
Internal Transfer | in_trans
VCC Live Pay | vccpay
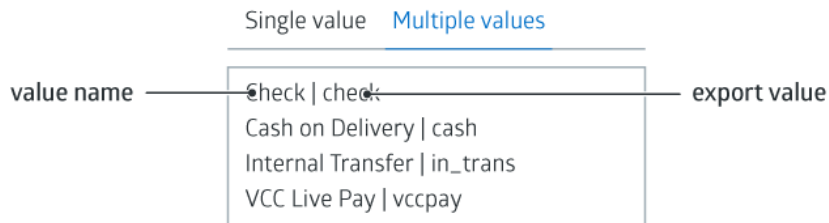
Managing the Quota Tool

The quota tool allows you to create a questionnaire, with a set of questions and a choice of answers for each question, to use as part of a survey or statistical study.

> **Tip:** read about tracking current changes related to your quota results in the Quota Wallboard section.

To Create a Quota Field

1. Select a project from the project list, then select **Database** > **Fields**.

2. Select **Create new field**.

3. Enter the **Unique identifier**.

4. Enter the **Label**. This is the field name that the agent will see.

5. Select **Single parameter** field type in the **Type** drop-down list.

6. Select **Edge** or **Cell** from the **Quota** drop-down list.

7. Mark the **Indexed** checkbox.

8. Press **Create field**.

> **Note:** you cannot create quota fields in parent projects' database. Quota fields must be added before upgrading a project to a parent project. Read about fields in the Managing Fields section.

To View Quota Fields and Quota Results

- Select a project from the project list, then select **Database** > **Quota**.

To Create a Quota Script

1. Select a project from the project list, then select **Script editor**.

2. Select **Script**.

3. Hover your mouse over the **Datasheet** or **Script** menu, then press ✚ .

4. Set your preferences, then press **Save** and **Close**.

5. Expand the **Script** menu, then select the script you just created.

6. Mark the **Quota page** checkbox.

7. Add controls from the toolbar. Make sure that you use quota fields. Read about adding controls in the Customizing Datasheets and Scripts section.

8. Press **Save and upload**.

To Create a Quota Disposition

1. Select a project from the project list, then select **Dispositions**.

2. Press **Add new disposition**.

3. Enter a name and set the desired settings. Mark the **Quota** checkbox.

4. Press **Add disposition**.

> **Note:** read about dispositions in the Managing Dispositions section.

Datasheet and Script Management

Managing Datasheets and Scripts

You can create datasheets and scripts that help agents handle calls using predefined dialogues, talking points, and information sheets.

> **Note:** datasheets appear as individual tabs that agents can switch between. Scripts appear as pages on a worksheet that agents can navigate through.

To Create a Datasheet or Script

1. Select a project from the project list, then select **Script editor**.

2. Select **Datasheet** or **Script**.

3. Hover your mouse over the **Datasheet** or **Script** menu, then press ➕ .

4. Set your preferences, then press **Save** and **Close**.

To Delete a Datasheet or Script

1. Select a project from the project list, then select **Script editor**.

2. Select **Datasheet** or **Script**.

3. Press ▶ to see your datasheets or scripts.

4. Hover your mouse over the datasheet or script you want to delete, then press 🗑 . Press **Yes**.

To Allow Agents to Edit Contact Details

1. Select a project from the project list, then select **Script editor**.

2. In the **General** pane, mark or unmark the **Enable editing on contacts tab** checkbox.

3. Press **Save**.

Customizing Datasheets and Scripts

You can customize your datasheets and scripts using an intuitive, drag-and-drop editing interface.

To Access the Script and Datasheet Editor Interface

1. Select a project from the project list, then select **Script editor**.
2. Select **Datasheet** or **Script**.
3. Press ▶ to see your datasheets or scripts, then select an item you want to customize.

To Add Controls from the Toolbar

- Once the editor interface is open, drag and drop controls from the toolbar to the required location. Read about controls you can add in the Types of Controls section.

To Delete a Control from the Script or Datasheet

1. Once the editor interface is open, select the control you want to delete, then press 🗑 in the toolbar.
2. Press **Save and upload**.

To Edit a Control's Properties

1. Once the editor interface is open, select a control that is already on your datasheet or script.
2. The control's properties are located on the right. Set the desired settings.
3. Press **Save and upload**.

To Obligate Agents to Fill in Data

1. Once the editor interface is open, select a control that is already on your datasheet or script.
2. The control's properties are located on the right. Mark the **Required** checkbox.
3. Press **Save and upload**. Agents now cannot close the script or datasheet without filling in the data.

To Show or Hide a Control by Using Conditions

1. Once the editor interface is open, select a control that you want to hide until certain conditions are met.
2. The control's properties are located on the right interface. Mark the **Hidden** checkbox. The system will jump automatically to the **Visualization** tab.

3. Select an option (field) from the **Field and values condition** drop-down list, then select one or more values using the checkboxes. When the selected values are marked by an agent, the hidden control will appear.

To Move to Another Script Page by Using Conditions

1. Select a project from the project list, then select **Script editor**.
2. Expand the **Script** list, then select a script.
3. The script page's properties are displayed on the right interface. Select **Simple condition** from the **Condition of loading next page** drop-down list.
4. Press 🖊 to edit the conditon.
5. Select a field from the drop-down list, and then a value.
6. Select a script page name from the drop-down list.
7. Press **Close**. When an agent selects the field value with condition, and then presses the next page button, the system will jump to the specified script page.

Quality Management

Quality Management Log

Get an overview of call quality based on how supervisors rated a call.

To Check Quality Management Log

1. From the **VCC Live menu**, select **Logs and statistics** > **User activity log**.
2. Set the time interval you need the log for.
3. Press 🔻 for more filtering options, then press **Search**.

Downloading and Listening to Call Recordings

You can listen to call recordings and download them as voice files.

To Enable or Disable Call Recording

1. Select a project from the project list, then select the **General** tab.
2. In the **General** pane, mark or unmark the **Enable voice recording** checkbox.
3. Press **Save**.

To Enable or Disable Call Recording in IVR

1. Select a project from the project list, then select the **General** tab.
2. In the **General** pane, mark or unmark the **Record voice in IVR** checkbox.
3. Press **Save**.

To Listen to a Call Recording

1. Select a project from the project list, then select **Logs and statistics** > **CDR log**.
2. Set the time period you need the reports for.

3. Optional: press ▼ for more filtering options.

4. Press **Search**.

5. While keeping your cursor over a call record, press ▶ .

To Download a Call Recording

1. Select a project from the project list, then select **Logs and statistics** > **CDR log**.

2. Set the time period you need the reports for.

3. Optional: press ▼ for more filtering options.

4. Press **Search**.

5. While keeping your cursor over a call record, press ⬇ .

To Set a Global Filename Rule

1. From the **VCC Live menu**, select **Contact Center** > **Global settings**.

2. On the **Project settings** tab, enter the parameters you need in the **Default downloaded sound file name** text field. Read about parameters in the Voice File Filename Parameters section.

To Set a Project-specific Filename Rule

1. Select a project from the project list, then select the **General** tab.

2. In the **General** pane, enter the parameters you need in the **Filename** text field. Read about parameters in the Voice File Filename Parameters section.

> **Note:** project-specific filename rules overwrite global rules.

To Manage Storage Settings

1. From the **VCC Live menu**, select **Contact Center** > **Global settings**.

2. On the **Storage** tab, set the desired settings.

3. Press **Save**.
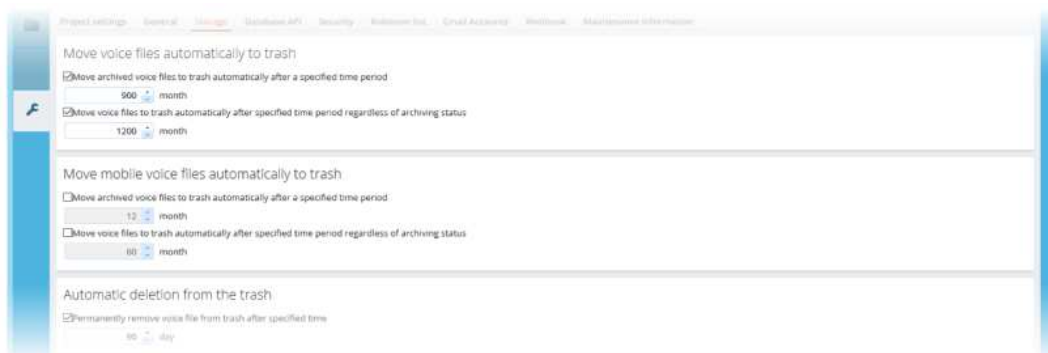
Rating Calls

You can review and rate each call to find out how individual agents handle customer queries.

name	description
1. Evaluation Category	Used to categorize various types of criterion.
2. Evaluation Criterion	A principle by which the call may be rated.
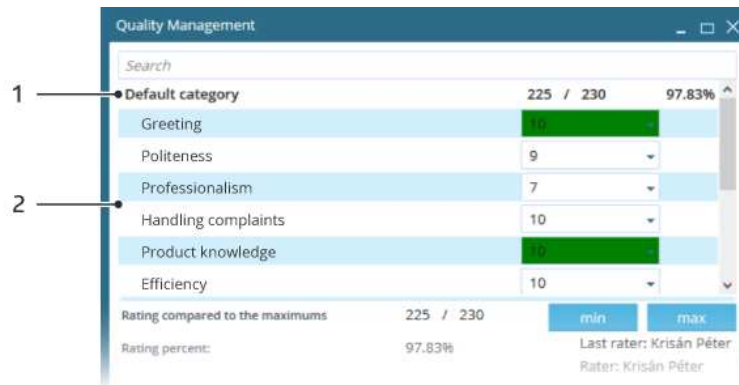
To Create Evaluation Categories

1. From the **VCC Live menu**, select **Contact Center** > **Quality management categories**.
2. Enter a name in the **Name** text field.
3. Select an option from the **State** drop-down menu.
4. Press **Add**.

To Add a New Evaluation Criterion

1. Select a project from the project list, then select the **Quality Management** tab.
2. Press **Add**. A new row appears.
3. Enter a title for your criterion.
4. Set the minimum, maximum, and weight values.
5. Select **Edge** in the **Color** drop-down menu to highlight ratings with colors that have either a minimum or maximum value.
6. Select an evaluation category.
7. Mark or unmark the **Required** checkbox to obligate users to fill in the criterion.
8. Enter a description.
9. Press **Save**.

> **Tip:** we recommend using criteria such as "efficiency" or "complaint handling".

To Rate a Call

1. Select a project from the project list, then select **Logs and statistics** > **CDR log**.
2. Set a time interval.
3. Optional: press ▼ for more filtering options.

4. Press **Search**.

5. Hover your mouse over a call record, then press **QM** .

6. Select scores.

7. Press **Save**.

> **Note:** the {{PRM-1112:report.TodoPRM1112} option sets the conversation's communication efficiency score and percentage to zero.

Monitoring

Real-time Monitoring

You can monitor user status and inbound/outbound calls in real time.

> **Tip:** add or remove additional information columns by using the button.

To Monitor User Status

- From the **VCC Live menu**, select **Monitoring** > **Real-time monitoring**, then refer to the **Users** pane.

> **Tip:** change the window layout by using the button.

To Filter User Status

- You can filter user status by typing in a name or username in the user textbox, or by using the dropdown lists.

To Monitor Outbound and Inbound Statistics

- From the **VCC Live menu**, select **Monitoring** > **Real-time monitoring**, then see the **Outbound** and **Inbound** panes.

To Listen Into a Conversation

Read about this feature in the Silent Coaching and Whispering section.

Call Wallboard

You can track current changes in the number of calls.

> **Tip:** add or remove additional information columns by using the button.

To Monitor Call Wallboard

1. From the **VCC Live menu**, select **Monitoring** > **Call wallboard**.
2. Press the **Refresh** button to update wallboard, or set a refresh time to specify the frequency of automatic call wallboard updates.

Inbound Wallboard

You can track current changes in the number of incoming calls.

> **Tip:** add or remove additional information columns by using the 🔳 button.

To Monitor Inbound Wallboard

1. From the **VCC Live menu**, select **Monitoring** > **Inbound wallboard**.
2. Press 🔻 for filtering options, such as filtering for a specific project's data. You can set a refresh time to specify the frequency of automatic inbound wallboard updates.

Quota Wallboard

You can track current changes related to your quotas.

> **Tip:** add or remove additional information columns by using the 🔳 button.

To Monitor Quota Wallboard

1. From the **VCC Live menu**, select **Monitoring** > **Quota wallboard**.
2. Press 🔻 for filtering options, such as filterng for a specific project's data. You can set a refresh time to specify the frequency of automatic quota wallboard updates.

Logs and Statistics

CDR Log

The CDR (Call Detail Record) log includes details of all incoming and outgoing call data for a specific project. Data includes details such as caller and called contact's name, call time and duration, terminated and rejected calls, as well as call voice recordings.

> **Tip:** add or remove additional information columns by using the 🔳 button.

To View the CDR Log

1. Select a project from the project list, then select **Logs and statistics** > **CDR log**.
2. Set the time period you need the log for.
3. Optional: press 🔻 for more filtering options.

4. Press **Search**.

To Listen to a Call Recording

1. Select a project from the project list, then select **Logs and statistics** > **CDR log**.
2. Set the time period you need the log for.
3. Optional: press ▼ for more filtering options.
4. Press **Search**.
5. Hover your mouse over a call record, then press ▶ .

To Download a Call Recording

1. Select a project from the project list, then select **Logs and statistics** > **CDR log**.
2. Set the time period you need the log for.
3. Optional: press ▼ for more filtering options.
4. Press **Search**.
5. Hover your mouse over a call record, then press ⬇ .

Email Log

You can view project-specific email log, including the total number of emails sent, email size, direction, and more.

To View an SMS Log

1. Select a project from the project list, then select **Database** > **Email list**.
2. Set the criteria to filter for emails, then press **Search**.

Mobile CDR Log

A mobile CDR (Call Detail Record) log includes all detail of incoming and outgoing call data handled via the **VCC Live App** for a specific project. Data includes caller and called contact's name, call time and duration, terminated and rejected calls, as well as call voice recordings.

> **Tip:** add or remove additional information columns by using the ⊞ button.

To View the Mobile CDR Log

1. Select a project from the project list, then select **Logs and statistics** > **Mobile CDR log**.
2. Set the time period you need the log for.
3. Optional: press ▼ for more filtering options.
4. Press **Search**.

To Listen to a Call Recording

1. Select a project from the project list, then select **Logs and statistics** > **Mobile CDR log**.
2. Set the time period you need the log for.

3. Optional: press ▼ for more filtering options.

4. Press **Search**.

5. Select a call record, then press ▶ .

To Download a Call Recording

1. Select a project from the project list, then select **Logs and statistics** > **Mobile CDR log**.

2. Set the time period you need the log for.

3. Optional: press ▼ for more filtering options.

4. Press **Search**.

5. Select a call record, then press ⬇ .

SMS Log

You can view SMS log for any project, including the total number of SMS sent, template used, results, calculated costs, and more.

> **Tip:** add or remove additional information columns by using the ▦ button.

To Check Project-specific SMS Logs

1. Select a project from the project list, then select **Logs and statistics** > **SMS log**.

2. Optional: press ▼ for more filtering options.

3. Press **Search**.

User Activity Log

Administrator and supervisor users can view logs for what activities supervisor users have attempted or managed to carry out, including log-in requests, setting updates, deletion of a Robinson List entry, etc.

> **Tip:** add or remove additional information columns by using the ▦ button.

To Check User Request Activity Log

-   From the **VCC Live menu**, select **Logs and statistics** > **User activity log**.

User State Log

You can keep track of agents' states to find out, for example when agents are on a call, use a break code, log in or out, or exceed the allowed break limit.

> **Tip:** add or remove additional information columns by using the ▦ button.

To Check User State Log

1. From the **VCC Live menu**, select **Logs and statistics** > **User state log**.

2. Set the criteria to filter for the particular users or groups you require the activity log for, then press **Search**.

Database Statistics

Get a quick overview of your database.

To View Database Statistics

- Select a project from the project list, then select **Database**.

Disposition Statistics

Get an overview of your disposition statistics.

> **Tip:** add or remove additional information columns by using the 🔳 button.

To Check Disposition Statistics

1. From the **VCC Live menu**, select **Logs and statistics** > **Disposition statistics**.

2. Set the time period you need the statistics for.

3. Optional: press 🔽 for more filtering options.

4. Press **Search**.

Global Call Statistics

Get an overview of call statistics for all projects.

> **Tip:** add or remove additional information columns by using the 🔳 button.

To View Call Statistics

1. From the **VCC Live menu**, select **Logs and statistics** > **Call statistics**.

2. Set the time period you need the statistics for.

3. Optional: press 🔽 for more filtering options.

4. Press **Search**.

> **Note:** multiple calls involving the same record are counted individually.

Global Inbound Statistics

The global inbound statistics menu shows reports for all inbound calls, including SLA (time allowed for answering calls), total number of calls, currently queuing calls, picked-up-in-time calls, etc.

> **Tip:** add or remove additional information columns by using the 🔲 button.

To Check Global Inbound Statistics

1. From the **VCC Live menu**, select **Logs and statistics** > **Global inbound statistics**.
2. Set the time period you need the statistics for.
3. Optional: press 🔽 for more filtering options.
4. Press **Search**.

Project-specific Call Statistics

Project-specific call statistics include all outgoing call data for a specific project.

> **Tip:** add or remove additional information columns by using the 🔲 button.

To View Project-specific Call Statistics

1. Select a project from the project list, then select **Logs and statistics** > **Call statistics**.
2. Set the time period you need the statistics for.
3. Optional: press 🔽 for more filtering options.
4. Press **Search**.

Project-specific Inbound Statistics

The project-specific inbound statistics includes all incoming call data handled for a specific project.

> **Tip:** add or remove additional information columns by using the 🔲 button.

To View Project-specific Inbound Statistics

1. Select a project from the project list, then select **Logs and statistics** > **Inbound statistics**.
2. Set the time interval you need the statistics for.
3. Optional: press 🔽 for more filtering options.
4. Press **Search**.

Project Independent CDR Search

The project independent CDR search allows you to search CDR (Call Detail Record) logs.

search criteria	description
1. Source	Caller's phone number.
2. Destination	Called party's phone number.
3. UUID	The unique UUID for an individual call.
4. Short ID	Individual record ID.
5. Agent	The agent who handled the call.
6. Date	Time interval.
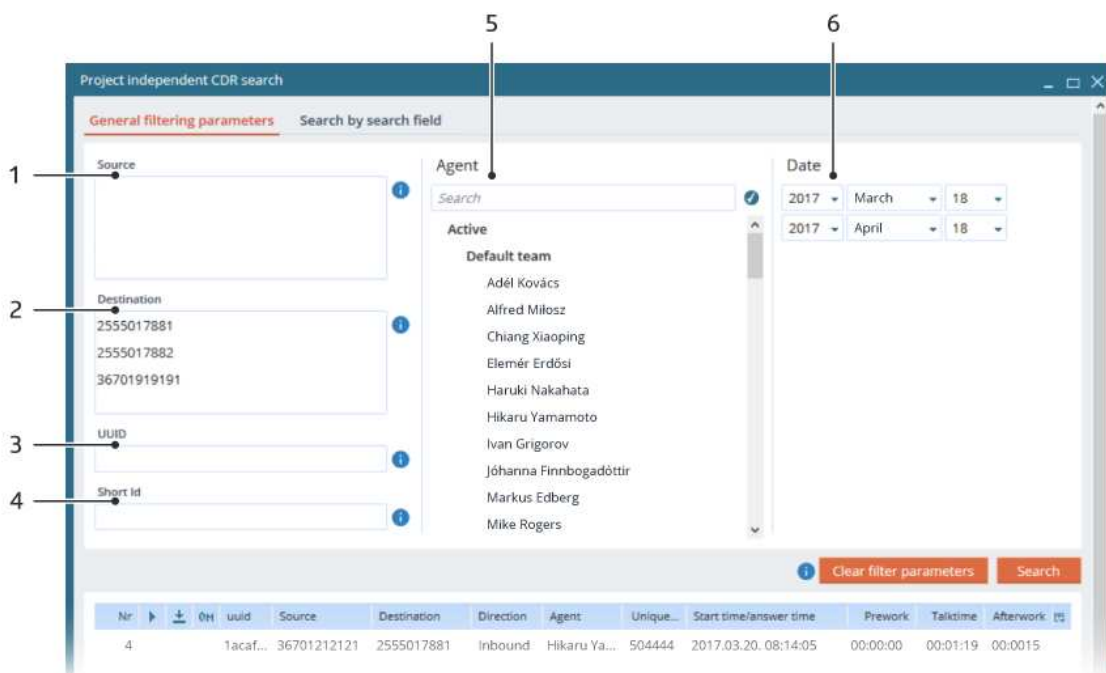
> **Tip:** you can enter multiple numbers (separated by a comma(,), semicolon(;) or linebreak(enter)) in the source and destination text fields.

To Use Project Independent CDR Search

1. From the **VCC Live menu**, select **Logs and statistics** > **Project independent CDR search**.
2. Enter the desired search criteria.
3. Press **Search**.

Weekly Inbound Statistics

Get a quick overview of your weekly inbound call statistics, or get tips on the ideal number of operators for your project based on recent statistics.

> **Tip:** add or remove additional information columns by using the ⊞ button.

To Check Weekly Inbound Statistics

1. From the **VCC Live menu**, select **Logs and statistics** > **Weekly inbound statistics**.
2. Set the time period you need the statistics for.
3. Optional: press ▼ for more filtering options.
4. Press **Search**.

Internal Communication

Silent Coaching and Whispering

You can listen into ongoing phone conversations and talk to an agent without the customer hearing. You can also take part in the phone call.

> **Note:** silent coaching and whispering features are only available when agents are in call state.

To Send a Message to an Agent

1. From the **VCC Live menu**, select **Monitoring** > **Real-time monitoring**, then select a user in the **Users** pane.
2. Select **Actions** > **Send message**.

To Listen in to a Phone Call

1. From the **VCC Live menu**, select **Monitoring** > **Real-time monitoring**, then select a user in the **Users** pane.
2. Select the radio button in the **Observe** column.

To Whisper during a Phone Call

1. From the **VCC Live menu**, select **Monitoring** > **Real-time monitoring**, then select a user in the **Users** pane.
2. Select **Actions** > **Tutor mode**.
3. The agent can now hear you without the customer hearing it.

To Take Part in a Phone Call

1. From the **VCC Live menu**, select **Monitoring** > **Real-time monitoring**, then select a user in the **Users** pane.
2. Select **Actions** > **Conference**.
3. The agent and customer can now hear you.

To Exit a Phone Call

1. From the **VCC Live menu**, select **Monitoring** > **Real-time monitoring**, then select a user in the **Users** pane.
2. Select **Actions** > **Ending monitoring session**.

Using the Internal Chat

Internal chat function provides a text-based, real-time communication interface within VCC Live Desk.

To Use the Internal Chat Function

1. From the **VCC Live menu**, select **User Management** > **Chat**.
2. Select the **To everybody** tab to send a chat message to all available users, or to send a message to only one user, select the user from the users list.

> **Note:** only available users receive messages you send.

Releasing News for Agents

Supervisors can publish multilingual news items within VCC Live Desk, which appear in pop ups on agents' screens after they log in.

To Create a News Item for Agents

1. From the **VCC Live menu**, select **User Management** > **News for agents**, then press ⊕ .
2. Select the **Publication date** field, then select the desired date and time. Agents will receive the news item at the specified time.
3. If it is not marked, mark the **Active** checkbox.
4. Select a language tab depending on the language the news item is in.
5. Select the **Subject** field, then enter the news item's subject.
6. Select the editor field, and add the news item you wish to publish. You can customize and format your text using the formatting toolbar.
7. Press **Save**.

> **Note:** A news item written in a specific language tab will appear only to those agents who use**VCC Live Desk** with the same language settings.

To Obligate Agents to Read All News

1. From the **VCC Live menu**, select **User Management** > **News for agents**.
2. Mark the **Force agents to read news.** checkbox. Agents will be required to open each news item before closing the **News** window.

Subscription Management

Checking Your Balance

You can keep track of your account balance, including all your costs such as licence, storage and telco fees.

To Check Your Balance

- From the **VCC Live menu**, select **Tools** > **Balance**.

To Export Your Balance

- From the **VCC Live menu**, select **Tools** > **Balance**, then press **Export**.

To Get a Monthly Summary of Your Balance

- From the **VCC Live menu**, select **Tools** > **Balance**, then select the **Monthly summary** tab.

Restriction Procedure

VCC Live follows an established procedure when payments are overdue. If payments remain outstanding for an extended period of time, VCC Live may restrict your account.

Restriction Levels

Restriction level	Description
Level zero	No restriction.
Level one	Notice of overdue payment.
Level two	Restricted admin and supervisor accounts.
Level three	Full restriction.

Buying Phone Numbers

You can purchase new displayable and non-displayable phone numbers.

> **Note:** as of now, you can only purchase Hungarian phone numbers.

To Buy a Phone Number

1. From the **VCC Live menu**, select **Tools** > **Buy a phone number**, then press **Buy a phone number**.
2. Select a country and postal code, then press **Next**.
3. Select an available phone number, then press **Next** to order the number.
4. Press **Finish**.

Account Security

Changing Your Password

You can change your password at any time.

To Change Your Password

1. From the **VCC Live menu**, select **Profile** > **Change password**.

2. In the **Current password** field, enter your old password.

3. In the **Password** and **Confirm password** fields, enter the new password you wish to use.

> **Tip:** press ⓘ to find out the password policy, including what type and how many characters are needed.

To Set Up a Customized Password Policy

- Read about this feature in the Using a Password Policy section.

> **Tip:** you can also use two-factor authentication. Find out more in the Using Two-factor Authentication section.

Using a Password Policy

You can enhance security by defining a password policy, thus requiring passwords used to log in to the **VCC Live Desk** to meet a specific minimum level of complexity. You can also set how long passwords remain valid, time-wise.

To Select a Predefined Password Policy

1. From the **VCC Live menu**, select **Tools** > **Global settings**, then select the **Security** tab.

2. Select a pre-defined setting from the **Current profile** drop-down list. It can be minimal, normal or hard. Press **Save**.

To Create a Customized Password Policy

1. From the **VCC Live menu**, select **Tools** > **Global settings**, then select the **Security** tab.

2. Select user's setting from the **Current profile** drop-down list.

3. Set the desired values in each relevant field, then press **Save**.

Restricting Access Based on IP Addresses

You can restrict access to **VCC Live Desk** or individual features based on IP addresses. This means that only users inside the range of IP addresses you enter can access the selected features.

To Add IP Address to User Right Group

1. Create a user right group, add users to it, then select what features you want this group to have access to. Read about this in the Managing User Right Groups section.

2. From the **VCC Live menu**, select **User Management** > **Rights**.

3. Select a group from the **Supervisor user right groups** or **Agent user right groups** column.

4. In the **Allowed IPs** textbox, enter the IP address or range. Only users inside the range of this IP address can access the rights.

> **Tip:** you can have the system insert your IP address by using the **Add own IP** button.

Using Two-Factor Authentication

Two-factor authentication provides an additional level of security to **VCC Live Desk**, by requiring users to complete a second verification step when logging in to the **VCC Live Desk**. With two-factor authentication, logging in requires both your password and an additional verification code you generate using an authenticator app on your smartphone.

To Enable Two-factor Authentication

1. **VCC Live Desk:** from the **VCC Live menu**, select **Profile** > **Enable two-factor authentication**.
2. **On your smartphone:** download and open the Googleâ¢ Authenticator application, then using the application, scan the QR code on your computer's display. A 6-digit number should appear on your smartphone's screen.
3. **VCC Live Desk:** enter the 6-digit number in the text field, then press **Save**.

> **Warning:** When **Two-factor authentication** is enabled, users cannot sign in to **VCC Live Desk** without using the Googleâ¢ Authenticator application. Please take this into consideration when changing smartphone.

To Disable Two-factor Authentication

1. **VCC Live Desk:** from the **VCC Live menu**, select **Profile** > **Disable two-factor authentication**.
2. **On your smartphone:** open the Googleâ¢ Authenticator application to receive a 6-digit number.
3. **VCC Live Desk:** enter the 6-digit number in the text field, then press **Save**.

To Disable Two-factor Authentication for a Specific User

1. From the **VCC Live menu**, select **User Management** > **Users**.
2. Select a user.
3. In the **Default** settings pane, unmark the **Two-factor authentication** checkbox.

> **Tip:** if a user cannot access the Googleâ¢ Authenticator application, for example if a smartphone is lost or broken, a user with administrator rights can disable **Two-factor authentication** for any specific user.

Over-the-Phone Payment

Introduction to VCC Live Pay

VCC Live Pay allows your clients and customers to make one-off or recurring payments while talking to an agent on the phone.

> **Note:** our IT infrastructure meets the requirements set by PCI DSS (Payment Card Industry Data Security Standard). This certification is a guarantee that no misuse of card data will occur at any stage of the payment process. Read more about security in the Security Considerations section.

Requirements and Important Information

- You must have a VCC Live Premium subscription.
- Your telco service provider must support SIP/TLS SRTP protocols.
- You must sign a contract with a bank service provider that includes agreements on transaction fees, receiving a transaction ID, and a two-party payment service. The ID must be shared with us in a secure way (compressed, encrypted and password protected).
- VCC Live Pay implementation may take up to two weeks due to security (PCI DSS) verification.

To Deploy VCC Live Pay

1. Contact your VCC Live Key Account Manager or our Support Team for details.
2. After the successful implementation of VCC Live Pay, you will receive a training session on how to use the service.

> **Note:** this feature is only available for clients with a VCC Live Premium subscription.

Changing Payment Settings

You can change your project's payment settings, including billing information and more.

To Access Payment Settings

1. Select a project from the project list, then select **VCC Pay**.

Checking Transaction History

View a summary of transactions.

To Check Transaction History

1. Select a project from the project list, then select **VCC Pay** > **Transaction list**.
2. Set the time period you need the transaction history for.
3. Optional: press ▼ for more filtering options.
4. Press **Search**.

Security Considerations

When customers make a payment using VCC Live Pay, they provide their debit card details via their phone's keypads. To prevent decoding, DTMFs (dual-tone multi frequency) are filtered when the customers enters their details. Data is transferred directly to the relevant financial partner, and is not shared with the agent or disclosed in any way during the procedure.

> **Note:** it may happen that sensitive information is disclosed by a customer to an agent by accident. You can read about handling information leaks in the **To Handle Information Leak** section.

To Handle Information Leak

1. The agent should immediately inform the customer.[1]
2. The agent should let their supervisor know about the incident as soon as possible.
3. You should restrict and limit the number of users who have access to the voice recording. Read about managing user rights in the Managing User Right Groups section.
4. You should contact your VCC Live representative or our Customer Care team for further support.

(1) Depending on the specific circumstances, the agent may also suggest that the customer change their PIN. However, this may be unneccessary if card details have not been fully disclosed.

Agent Workspace

Logging in to Projects

The project login screen allows you to select one primary project, and one or more secondary projects. When you select secondary projects, you will receive calls from those projects as well.

> **Note:** you can only see projects you are assigned to. You need to log in as an agent user to see the project login screen.
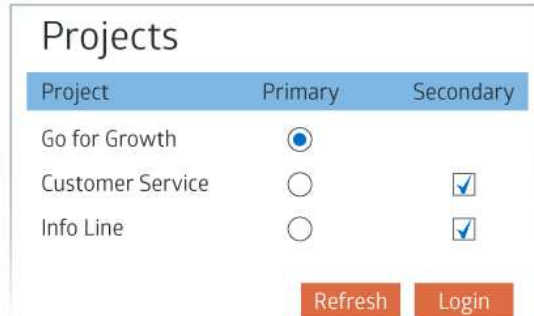
To Log in to VCC Live Desk

1. Submit your user name, password and account name.
2. Press **Login**. The login screen appears.

> **Tip:** a number of customization options are available on the login screen. Read more in the Login Screen Overview section.

To Log in to a Project

1. Mark the radio button beside the project you want to log in to. This will be your primary project.
2. Mark one or more checkboxes next to the projects you want to be your secondary projects.
3. Press **Login**.

To Refresh the Project Login Screen

1. Press **Refresh**.

Agent Workspace Overview

From the agent workspace, you can handle calls, emails, tickets, and chat messages.

> **Tip:** read about the admin workspace in the Admin Workspace Overview section.

> **Note:** layouts may differ depending on the dialing mode you use.

name	description
1. VCC Live menu	Access generic settings. Works only from the project login screen.
2. Taskbar	Use tabs to switch between the call, email and ticket, manual dialer, agent browser, and chat worksheets.
3. Worksheet	The interface where you do most of your work.
4. Status bar	A bar displaying various kinds of status information.
5. Internal chat	Internal chat function provides a text-based, real-time communication interface within **VCC Live Desk**.
6. Volume settings	Adjust the volume of system tones, and your or the other party's speech volume.
7. Project login time	Total time spent logged into the current project.
8. Call and DTMF buttons	Carry out DTMF, accept, end, reject and transfer call activities.
9. Status info	Used to indicate your status, as well as the time spent in that status.
10. Function keys	Open test mode, add a new contact, look up records, log out, or use break codes.
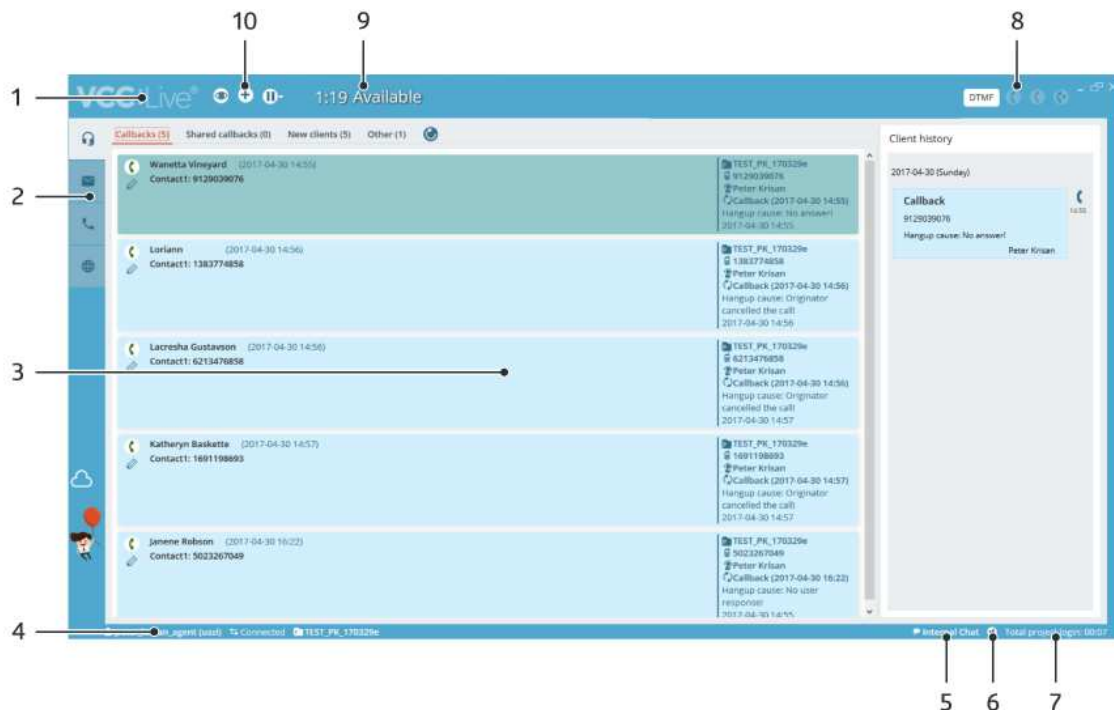
Using Break Codes

When you are taking breaks, you need to use break codes to indicate your status as well as prevent the system distributing calls to you.

To Use a Break Code

1. While logged in to a project, press ⏸▾ .
2. Select a break code. The pause/resume screen appears.

Note: admins can set up soft and hard limits. When you reach a limit, the color of the pause screen changes to indicate that you have exceeded the limit.
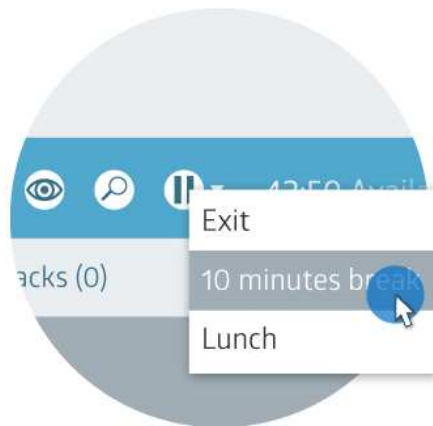
To Resume Work

- While on the pause/resume screen, press ▶ .

Using the Internal Chat

The Internal Chat function provides a text-based, real-time communication interface within **VCC Live Desk**.

To Use the Internal Chat Function

1. Press 💬 to open Internal Chat.
2. Enter your message in the textbox, then press **Send**.

Note: only available users receive messages you send.

Using the Agent Browser

The Agent Browser can be accessed by you after login, and is available to you whether you are in a call or not. Admins can add up to 10 websites to the agent browser.

> **Tip:** we recommend admins add websites that provide useful information for you, such as a company home page, browser-based CRM system or web-mapping service.

To Use the Agent Browser

1. Press 🌐 on the taskbar to access the browser.
2. Use the navigation buttons to navigate your way around. Press 🔵 to return to the original web page, press 🔵 to navigate to the previous page and press 🔵 to navigate one page forward.

Handling Calls

This interface allows you to handle calls. During a call, a datasheet or script is displayed that help you handle calls using predefined dialogues, talking points, and information sheets. When a call ends, you can add a disposition to a record to indicate the result of the call.

name	description
1. Callbacks	Records to be called back, for example, the customer asks you to call them back.
2. Shared callbacks	Records to be called back by one of the agents in the project.
3. New clients	New contacts that weren't called yet.
4. Other	Records that were unavailable.
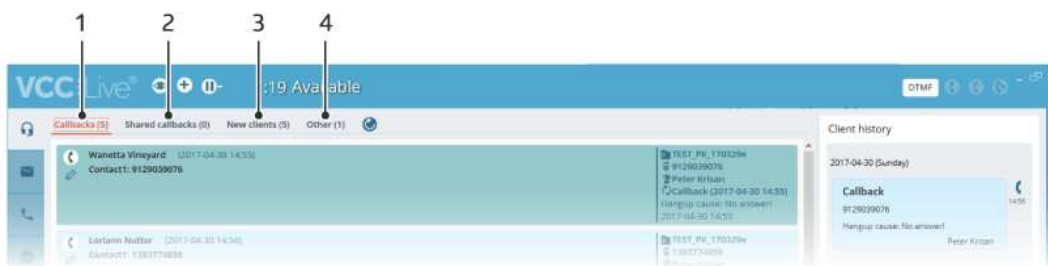
To Use the Phone Buttons

- Press [icon] to answer an incoming call.
- Press [icon] to end or reject a call.
- Press [icon] to forward a call.
- Press [DTMF] to activate the DTMF pad.

To Access the Keypad and Extensions

1. Press [icon] on the taskbar.
2. Select the **Call** tab to activate the keypad, select the **Call extension** tab to access the extensions list or select the **Call agent** tab to access the agent list.

To Manually Dial a Contact from the Contacts List

1. Select the contact you wish to call.
2. Press [icon] to place the call.

> **Note:** in projects with predictive dialing mode, the system automatically initiates calls.

To Indicate the Result of a Call Using a Disposition

1. In the **Dispositions** pane, select the **Unreached**, **Reached**, or **Success** tab, then select a disposition depending on the result of the call.
2. If you select an unreached or callback type disposition, then you need to set a callback date and time.
3. If appropiate, add an optional remark in the text box.
4. Press **Save**.

Handling Chat Messages

Chat allows your clients to communicate with you in real time on your website, using a chat interface.

name	description
1. Received message	Message from the client.
2. Sent message	Message you've sent.
3. Reply text field	Enter your message, then press **Send** to send the message.
4. Close button	Exit the chat conversation.
5. Spam radio button	Blocks the sender by IP address.
6. Client information	Information about the sender, including source website, website language, IP address, and browser used.
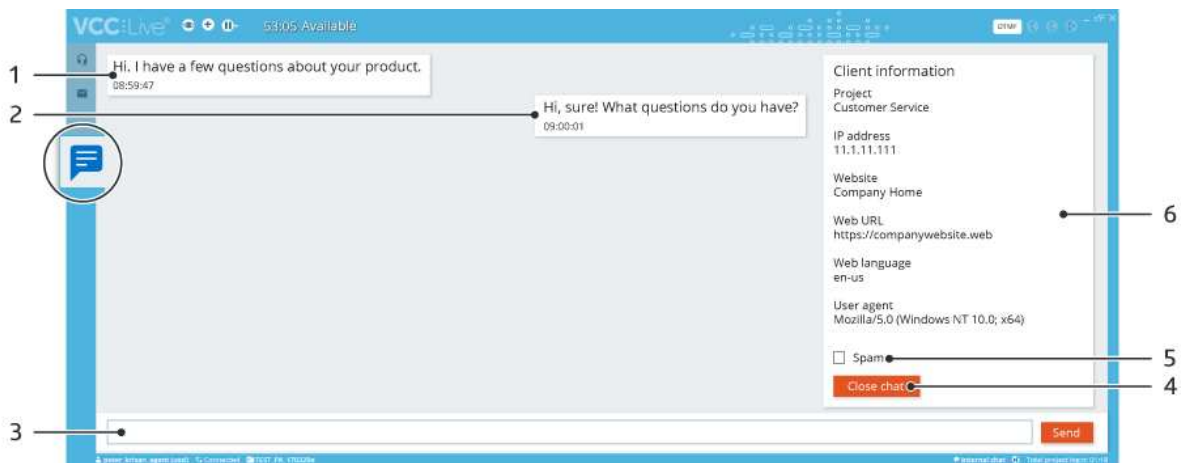
To Access Chat Messages

- When a website visitor contacts you via chat, the chat interface automatically pops up in VCC Live Desk.
- If chat is already open, press 🗩 on the taskbar to activate the chat worksheet.

Tutorials

Downloading Voice File Extracts

Voice file tagging is a powerful function that allows agents to mark specific parts of a conversation while on the phone. Then, you can download the marked parts of the call recording separately using the **VCC Live Archiver** software.

In this tutorial, you will learn how to:

- implement a voice file tag button into a datasheet or script
- mark a specific part of a conversation during a phone call
- modify the voice file name settings
- download voice files with **VCC Live Archiver**

To Add a Voice File Tag Button to a Datasheet or Script

1. Add a button control to a datasheet or script. Read about adding controls in the Customizing Datasheets and Scripts section.
2. Edit its properties. Enter the desired **Label name** and **Identifier** for the code editor.
3. Press **Edit code** and insert the function: https://vcc.live/developers/script-sdk/functions/addVoicefileTag
4. Agents can now mark certain parts of the conversation using the implemented button or by switching between datasheets.

To Add Part Names to Downloaded Voice File Names

1. Open the voice file's name settings. Read about setting filename rules in the Downloading and Listening to Call Recordings section.
2. Insert {part}/ at the beginning of the voice file name rule.

To Download Voice File Extracts Using VCC Live Archiver

1. Use VCC Live Archiver to download voice file extracts. To let the application know that you want to download only the extracts, you need to use a dedicated switch. Read about switches in the Using Switches section.

> **Note:** if you download complete voice recordings (you're not using the voice file extracts switch), then voice recordings are downloaded to the "complete" folder. When you use the voice file extracts feature, then they are downloaded to the folder you specify.

References

Dialing Modes

A dialing mode can be either automated or manual. In automated mode, it defines how the system selects records that are to be called. In manual mode, calls are placed manually by an agent. Read about outbound calls in the Outbound Calls section.

Dialing mode	Explanation
Manual	In Manual mode, the agent selects the next record to be called from the Records list. This mode is recommended for projects that have long pre-call preparation times. This is the least efficient dialing mode.
Power	In Power mode, the system automatically initiates as many calls as there are number of available agents. • When the system successfully reaches a customer, it automatically connects the customer to an available agent. This mode guarantees that all agents are kept in a call. • If a call is unsuccessful (a customer is unavailable), the system automatically dials the next record, and the call is saved as a shared callback, without the agent having to do anything.
Predictive	In Predictive mode, the system automatically initiates more calls than number of available agents. An advanced algorithm takes into consideration the average talk time, number of currently available agents and percentage of reached records. It ensures the highest agent utilization, with an average talk time of up to 45 minutes per hour.
OutboundIVR	Outbound IVR is used to automatically establish connections between customers and the system without involving an agent. This mode includes a voice recording played to clients, reading the client's balance and payment due date, call direction to an available agent or answering machine feature, etc.

Inbound Processes

An inbound call consists of processes. A process is a set of actions, functions, automations or conditions. It

allows you to define what happens when a caller reaches out to you. Read about inbound projects in the Inbound Calls section.

Icon	Item	Description
	Timesheet	Allows you to schedule a process for a specific date or day.
	Macro	A set of inbound processes that you can invoke by using the run macro command, so that you can use a macro in various timesheets or projects.
IVR	IVR	An interactive voice response menu that allows customers to interact with your system through the use of DTMF tones inputted via a keypad.
	IVR button	Add IVR buttons within an IVR process so that you can assign individual voice files and processes to those buttons, triggered when a caller presses the relevant key.
	Wrong number	Defines what happens when a caller inputs a non-existing IVR key.
	Timeout	Defines what happens when a caller timeouts the IVR (makes no selection).
	Queue	Places incoming calls in a queue to be answered after agents finish with their current calls.
	Answering Machine	Answers calls when agents are busy, so that customers can leave a recorded message. You need to add a playback item before this process, to let callers know they can leave a message. Records dealt with in this way are marked with an Answering Machine disposition.
	Playback	Plays a set sound file.
	Redirect	Forwards a call to a phone number.
	Dial external extension	Forwards a call to an extension.
	Get digits and playback	Customers can provide you with data, for example a customer identificaton number, using a keypad. You can also add a recorded voice file before the data is inputted. The data is assigned a variable that you can use in other processes.
HTTP	Transfering data	You can refer to variables and forward the data to a specific system via APIs.
	Read-back	Reads a variable's value back to the customer.
	Transfer (Deprecated)	Can move the menu to a given process based on various rules you set, for example based on the caller phone number, used variable or process id.

Icon	Item	Description
	Set variable	You can set variables.
	Query Data	You can assign field values to variables.
	Disposition	Adds a disposition to the record. No system dispositions can be used.
	Jump	You can use it with labels, and to move to a different process or project.
	If	An if formula.
	Switch	You can add cases to it that will be selected and triggered based on conditions.
	Run macro	Triggers a macro.
	Cycle	You can add this option so that the menu loops until a given condition is met.
	Hangup	Hangs up the call.

Types of Controls

The intuitive editor interface allows you to create complex datasheets and scripts by dragging and dropping controls. Read about using controls in the Customizing Datasheets and Scripts section.

Control	Description
Text	Insert formatted text.
Text box	Enables users to input text information.
Drop-down list	Enables users to choose a value from a list of a pre-defined set of options.
Radiogroup	Enables users to choose one of a predefined set of options.
Checkbox	Enables users to select more than one item from a list of a pre-defined set of options.
Date and time	Enables users to select a date and time.
Browser	Gives users access to a predefined web page.
Email template	Enables users to select an email template to be sent to the record.
List	Enables users to select one or more items from a list of a pre-defined set of options.
Combined choice	A control that consists of a text box and drop-down list.
Matrix	Enables users to choose a value from a list of a pre-defined set of options.
Button	Enables users to trigger a predefined task set up by pressing a virtual button.
Sound	Enables users to play a voice file during a phone call. Can be heard by the other party.
Box	Used to contain and group different type of controls.
Chart	Used to create multiple boxes to contain and group various types of controls.
Placeholder	Used as a line break to divide groups of controls.
VCC Pay	Allows agents to initialize one-off or recurring over-the-phone payments.

User States

User states indicate the system state of individual agents. Read about monitoring user states in the User State Log section.

User sate	Description
Afterwork	Afterwork includes all tasks agents handle after a call ended, including selecting a disposition, updating CRM information, writing remarks, and more.
Available	Agents are available to receive calls.
Call	Agent is in call.
Prework	Prework includes all tasks agents handle before a call connects, including updating CRM information, writing remarks, and more.
Ringing	The called party has not answered the call yet.
Unavailable	Agent is logged in to the **VCC Live Desk**, but is not logged in to a project.
Waiting for Call	Connecting agent to the other party.
Waiting for Recall	A state before agent is moved to available state. The system checks if the agent has any callbacks.

> **Note:** the system does not route calls to agents in afterwork, call, prework, ringing, unavailable, waiting for call, and waiting for recall states.

Voice File Name Parameters

You can define voice filenames using various parameters. Read about call recordings in the Downloading and Listening to Call Recordings section.

Requirements

- A parameter needs to be inserted between {curly brackets}.
- Parameters must be separated with an underscore: _.
- Special characters such as ":*?<>|" are replaced with an underscore: _.
- Fix components in names must be inserted without curly brackets.

Parameter Sheet

| Parameter	Meaning	Use as
id	client identifier	{id}
project.name	project name	{project.name}
project.id	project identifier in your database	{project.id}
starttime	time when call started	• default format {starttime}, • shortened date format (yy-mm-dd) {starttime:Dm-%d}, • shortened date format without hour, minutes, seconds and hyphen {starttime:m%d}, • full format without hypens (yearmonthdayhourminutesecond) {starttime:DmHS}
direction	call direction (outbound or inbound)	{direction}
disposition.name	disposition name belonging to the call	{disposition.name}
disposition.exportname	disposition export name belonging to the call	{disposition.exportname}
field.<fieldname>	any client data belonging to the recorded call (number of fields)	eg. {field.name} = customer name
agent.username	call handler's username	{agent.username}
source	phone number belonging to the call	{source}
destination	called phone number	{destination}
disposition.description	disposition description	{disposition.description}
disposition.reach	disposition qualification	{disposition.reach}
disposition.id	disposition	{disposition.id}
uuid	call identifier	{uuid}
part	defines voice file chunk's folder name and the chunk's name	{part}
agent.custom.<fieldname>	custom agent identifier belonging to the voice file, and added to the agent	if you have eg. a property field, than: {agent.custom.property}

VCC Live Archiver

This user guide leads you through the setup of VCC Live Archiver.

About This User Guide

Introduction to VCC Live Archiver

VCC Live Archiver is a console application that is initiated from a command line. It can be used to archive and download call recordings from VCC Live Desk.
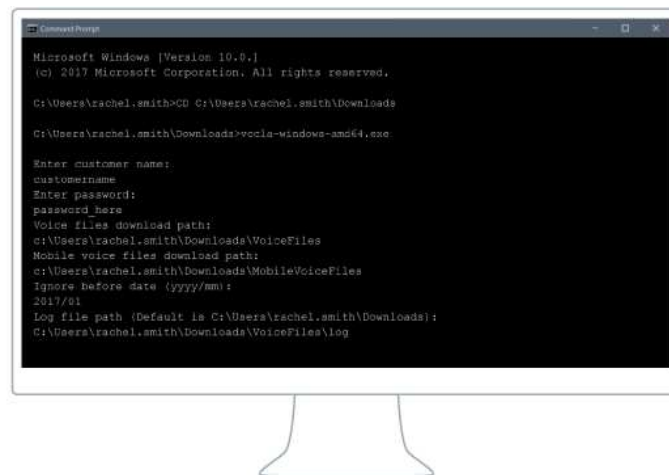
General Information

Thank you for choosing VCC Live, the innovative cloud-based contact center solution.

This user guide leads you through the setup and features of **VCC Live Archiver**. Whether you are a new or experienced user, we have you covered with this user guide. It covers all available features of the product.

Printing this Document

To make the VCC Live experience better for you, we release updates regularly. Updates include improvements, bug fixes, and new features. For this reason, we also update this user guide every week, thus making a printed version quickly outdated.

Please take this into account before printing. It may also help protecting the environment.

You can download our user guides in PDF format here:
https://vcc.live/help

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To learn more about VCC Live, visit our website: https://vcc.live/

VCC: Live®

Explanation of Symbols

Note Types

type	description
tip	Useful information.
note	Important information.
warning	A situation which, if not avoided, could result in data loss.

Mouse Clicks

left-click   right-click   double-click   drag and drop

Using the Application

Firewall Settings

An overview of firewall settings required for your copy of **VCC Live Archiver** to communicate seamlessly with our servers.

source	destination[1]	port	protocol
any	data center IP range	443/TCP	HTTPS
any	data center IP range	5060/TCP, UDP	SIP[2]
any	data center IP range	5061/TCP	SIP-TLS[3]
any	data center IP range	10000-20000/UDP	RTP / SRTP

(1) Use a data center IP range.
(2) Unsecured SIP communication, use a SIP-TLS instead.
(3) If you use a restricted VoIP connection, the 5061 TCP connections need to be opened.

Data Center IP Ranges

data center	IP range
hu1	194.38.106.64/26
hu2	193.68.62.192/26
ke1	62.12.118.64/27
au1	108.61.213.28/32

Example of using hu1 hosting

source	destination	port
any	194.38.106.64/26	443/TCP
any	194.38.106.64/26	5060/TCP, UDP
any	194.38.106.64/26	5061/TCP
any	194.38.106.64/26	10000-20000/UDP

Creating a Token

In order to archive and download call recordings from **VCC Live Desk** using **VCC Live Archiver**, you need to connect the two applications. This includes registering your IP address(es) and generating a unique token in **VCC Live Desk**.

To Create a Token

1. **VCC Live Desk**: from the **VCC Live menu**, select **Contact Center** > **Global settings**.

2. Select **Database API** tab.

3. In the **IP filter settings** textbox, insert the IP address, IP range or domain from where you want to access **VCC Live Archiver**. Â

Â
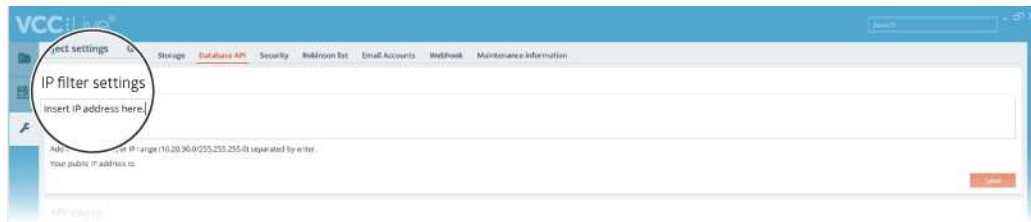
4. Press **New token** button to create a new token. You may need to scroll down to see the button.

5. Enter an application name. Press **Generate token** button to generate your token.

6. Make sure to write down this token, for example, by copy-pasting it to your clipboard, notepad or a text editor software.
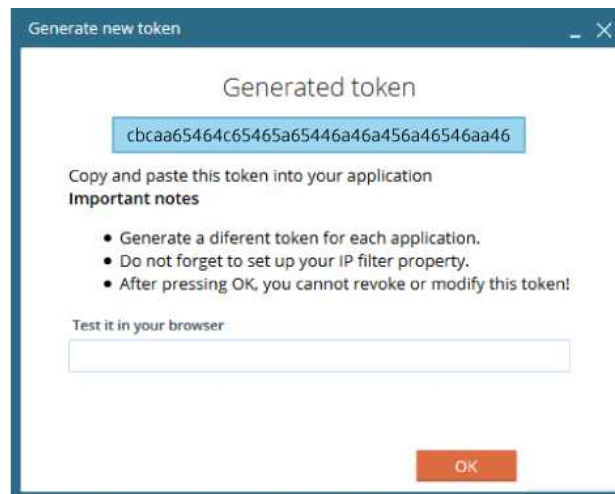
> **Warning:** once you close the **Generate new token** dialog box, you won't be able to return to it to make changes or get your token again. Therefore, ensure you make a note of your token before closing this dialog window.

To Set up VCC Live Archiver

- You are now ready to set up **VCC Live Archiver**. Read about the setup procedure in the Setting up VCC Live Archiver section.

Setting Up VCC Live Archiver

VCC Live Archiver is a console application that is initiated from a command line. It does not require installation.
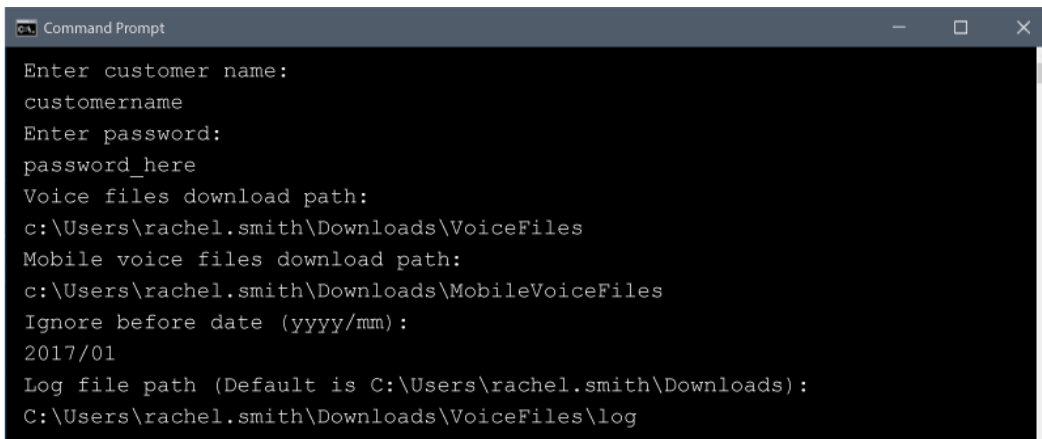
To Download VCC Live Archiver

1. Visit our download site to download the application.

2. Select the right version for your operating system, then press **Download**.

To Configure VCC Live Archiver

1. Create folders where you want to download call recordings and log files.
2. Launch **VCC Live Archiver**.
3. In the **CUSTOMER** line, enter the desired information. Press enter.
4. In the **PASSWORD** line, enter the token key you have already generated in **VCC Live Desk**. You can insert it by copying the token from the **Generated token** field in **VCC Live Desk**, and then insert it here using your mouse's right button. Press enter.
5. In the **VOICE_FILE_DIR** line, insert a path to a location where you want to store your voice files. The path or folder's name cannot contain spaces or any special characters. Press enter.
6. In the **MOBIL_VOICE_FILE_DIR** line, insert a path to a location where you want to store the voice files recorded using your phone. Press enter.
7. In the **IGNORE_BEFORE** line, specify a date. Only recordings created after this date will be downloaded. Press enter.
8. In the **LOG_FILE_DIR** line, insert a path to a location where you want to store the log files. Press enter.

> **Note:** configuration parameters are stored in an **.env** file, which can be found in the same folder where you launched **VCC Live Archiver** from. It can be edited using a text processor application.

To Execute VCC Live Archiver

- You are now ready to execute **VCC Live Archiver**. Read about the procedure in the Executing VCC Live Archiver section.
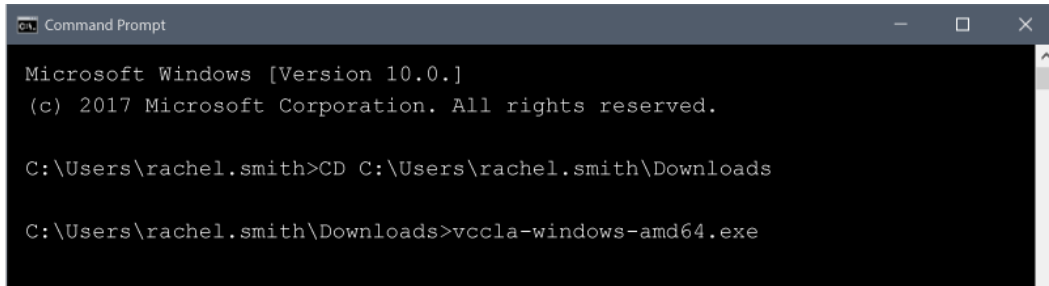
Executing VCC Live Archiver

You can execute **VCC Live Archiver** from a command line.

> **Tip:** we recommend using **Windows Task Scheduler** or **Linux Cron** to schedule **VCC Live Archiver** to run periodically at fixed times, for example, at night.

To Execute VCC Live Archiver from Windows Prompt

1. Launch *cmd.exe*.
2. Change directoy to the folder where the **VCC Live Archiver** executable file is located using the "CD" command. For example, enter "CD C:\Users\rachel.smith\Downloads". Press enter.
3. Enter the name of the executable file. This can be "vccla-windows-386.exe" or "vccla-windows-amd64.exe" depending on the version you downloaded. Press enter.

```
Command Prompt                                              —    □    ×

Microsoft Windows [Version 10.0.]
(c) 2017 Microsoft Corporation. All rights reserved.

C:\Users\rachel.smith>CD C:\Users\rachel.smith\Downloads

C:\Users\rachel.smith\Downloads>vccla-windows-amd64.exe
```

To Execute VCC Live Archiver from Linux Shell

1. Launch the application from **Linux Shell** using the "# ./vccla-linux-386" or "# ./vccla-linux-amd64" command.

To Use Switches

- You can use switches to modify the default behavior of **VCC Live Archiver**. Read about the procedure in the Using Switches section.

Using Switches

You can use switches to modify the default behavior of **VCC Live Archiver**.

> **Note:** default behavior: if a file has already been downloaded, then the file is marked as archived and will not be downloaded again.

switch	description
âv	Version information.
ââdry-run	Downloaded voice files are not marked as archived.
ââdownload	Default behavior is ignored: voice files are downloaded whether they are marked as archived or not, and downloaded files will not be marked as archived.
ââparts	Only extracts (partial voice files) are downloaded.
ââfrom	Download voice files from this date (if not used, the previous day's recordings are downloaded).
ââto	Download voice files until this date (if not used, the previous day's recordings are downloaded).
ââprojectid	Download voice files from only the given project (optional).

Examples of Using Switches in Windows Prompt

To show the version:

```
vccla-windows-386.exe -v
```

To download all voice files created between 2017-01-01 and 2017-01-31:

```
vccla-windows-386.exe --download --from 2017-01-01 --to 2017-01-31
```

To download all voice files created between 2017-01-01 and 2017-01-31 in the project with ID number 123:

```
vccla-windows-386.exe --download --from 2017/01/01 --to 2017/01/31 --projectid 123
```

To download voice file extracts, from between the "ConfirmingDetails" and "EndofConfirmation" tags to the "VoiceFileExtracts" folder:

```
vccla-windows-386.exe --download --parts VoiceFileExtracts:ConfirmingDetails-EndofConfirmati
on
```

To download voice file extracts, from between the "ConfirmingDetails" and "EndofConfirmation" tags, recorded in July 2017, from the project with ID number 123 to the "VoiceFileExtracts" folder:

```
vccla-windows-386.exe --download --from 2017/07/01 --to 2017/07/31 --projectid 123 --parts V
oiceFileExtracts:ConfirmingDetails-EndofConfirmation
```

Examples for Using Switches in Linux Shell

To show the version:

```
# ./vccla-linux-386 -v
```

To download all voice files created between 2017-01-01 and 2017-01-31:

```
# ./vccla-linux-386 --download --from 2017-01-01 --to 2017-01-31
```

To download all voice files created between 2017-01-01 and 2017-01-31 in the project with ID number 123:

```
# ./vccla-linux-386 --download --from 2017/01/01 --to 2017/01/31 --projectid 123
```

To download voice file extracts, from between the "ConfirmingDetails" and "EndofConfirmation" tags to the "VoiceFileExtracts" folder:

```
# ./vccla-linux-386 --download --parts VoiceFileExtracts:ConfirmingDetails-EndofConfirmation
```

To download voice file extracts, from between the "ConfirmingDetails" and "EndofConfirmation" tags, recorded in July 2017, from the project with ID number 123 to the "VoiceFileExtracts" folder:

```
# ./vccla-linux-386 --download --from 2017/07/01 --to 2017/07/31 --projectid 123 --parts Vo
iceFileExtracts:ConfirmingDetails-EndofConfirmation
```