



User Portal

Introduction

Welcome to your Answering Service Care (ASC) Client Portal! This guide will help you navigate the portal's features and functionalities to manage your Answering Service account more effectively.

Dashboard

The dashboard is the command center of your ASC client portal. It provides a quick snapshot of your most relevant information. Let's take a tour of the key sections:

1. Dashboard Widgets

- The dashboard widgets are available to access quick details and serve as shortcuts to important areas of your client portal.
 - i. **New Messages:** Indicates the number of unacknowledged messages in your inbox.
 - ii. **Delivered Messages:** Shows the total number of messages that have been acknowledged.
 - iii. **Monthly Usage:** Reflects the minutes used in the current month.
 - iv. **Last Login:** Displays the date of your last login to the portal.

2. Month To Date Usage Report

- Graph: A visual representation of your usage throughout the current month. It shows usage trends over time.
- Usage Types: The graph differentiates between standard usage and operator-assisted calls.

My Accounts

The Accounts section of the portal gives you an overview of your current Phone Numbers with the Answering Service. Each phone number is branded with company information, logos, etc. The Accounts section allows you to manage this information and ensure it's up to date along with the Users you would like to invite to your portal. Users can be assigned access to different elements of the User Portal of an Account. Navigate to Users, Edit a user, and then select Access to configure changes to access.

Access Type	Description
Billing	Access to the online payment portal
Account Management	Access to the Accounts company information
Oncall Calendar Management	Edit access to the Oncall Calendar
Call Recording	Access to Call Recording

Messages

This section of the client portal is designed to help you efficiently manage your messages and keep track of activities related to your account(s).

The Messages Dashboard is split into two main categories:

- **Messages:** On the left, displaying all new and acknowledged messages.
- **Activities:** On the right, showing recent activities related to messages.

Messages

1. **New vs. Acknowledged Tabs:** At the top of the messages list, you have two tabs: “New” and “Acknowledged”.
 - The “New” tab shows messages that have not yet been acknowledged.
 - The “Acknowledged” tab contains messages that have been marked as acknowledged after reviewing.
2. **Message Overview:** Each message row contains:
 - ID: A unique identifier for the message.
 - Created At: The date and time the message was received.
 - From: The name of the caller who left the message.
 - Phone: The phone number gather from the caller
 - Message: A brief preview of the message content.
 - Company Name: The company associated with the message, if applicable.
3. **Acknowledging Messages:** To acknowledge a message, click the “Acknowledge” button on the right side of the message row. This indicates that you have seen and/or acted upon the message.

Activities List

1. **Activities Overview:** This section logs recent actions taken on messages, such as when a message was delivered, acknowledged, or if there was any escalation.

2. **Navigating Activities:** You can scroll through the list to see all recent activities. Each entry will show the activity description and the date/time it occurred.

Additional Features

1. **Search Function:** Use the search bar to quickly find specific messages by keyword, sender, or message content.
2. **Message Selection:** Use the checkboxes next to each message to select multiple messages at a time for bulk actions like acknowledging.
3. **Page Navigation:** Use the “Previous” and “Next” buttons at the bottom of the messages list to navigate through pages of messages.
4. **Sorting Messages:** Click on the column headers to sort messages by ID, date, sender, etc.

Scripts

The Scripts section gives you an overview of the currently active Agent Script on any of your phone numbers with the Answering Service. You can see how Agents are answering your calls and gathering information from callers.

Oncall Calendar

Add Contacts

1. Navigate to the left-side panel labeled Contacts and select the (+) button.
2. Type the name of your contact and press Save.

Add Delivery Methods

All contacts can be assigned a variety of delivery methods which our Agents will use to deliver your message notifications.

1. While in the menu of the selected contact click the button
2. Select the Delivery Method of your choice:
 - Call - Verbal Phone Call
 - Phone Number - The phone number you would like our Agents to dial.
 - Phone Type - The type of phone they are dialing
 - Call Instructions
 - Complete Message - Entire message left on voicemail
 - Message for Callback - A voicemail to call the Answering Service back for the entire message.
 - Digital Beep - A pager message with either the number to call us back or the caller's number.
 - SMS - Text Message
 - Email
 - Fax

- App - Mobile App Push Notification (*mobile app required*)
 - [Apple Store \(iOS\)](#)
 - External API - Custom Notifications (Speak to your account manager for more information)
3. Add the corresponding contact information and click the button

Rename Contacts

1. Underneath Contacts select the button next to the contact you wish to rename.
2. Select Rename in the bottom right corner of the contact.
3. Enter the new name you wish to rename the contact to and Save.

Edit Delivery Methods

1. Underneath Contacts select the button next to the contact you wish to rename.
2. Select the button next to the delivery method you wish to edit.
3. Edit the information as needed and click the button.

Delete Delivery Methods

1. Underneath Contacts select the button next to the contact you wish to delete.
2. Select the (red cross) delete button next to the delivery method you would like to remove.
3. Press Ok on the prompt to confirm the removal of that delivery method.
4. *Note: Deleting a delivery method will also remove it from any existing calendar events. This CANNOT be undone.*

Delete Contacts

1. Select the (trash can) icon next to the contact you wish to delete.
2. Press OK on the prompt to confirm the removal of that contact.
3. *Note: Deleting a contact will remove them from all existing events on the calendars. This CANNOT be undone.*

Merge Contacts

1. Select the merge button.
2. Select all the contacts you want to merge together under 'Select Contacts'
3. Enter the name you would like to rename the newly merged contacts under 'New Contact Name'
4. Press OK on the prompt to confirm the merging of the contacts.
5. *Note: This CANNOT be undone.*

Calendar Events

Add New Events

1. Navigate to the calendar in which you would like to add your new event.
2. Select the 'New Event' button.
3. Select or enter the duration in which the event will last.
4. Optional: Set a schedule for the event (*see recurring schedule for more information*).
5. Select 1 or more delivery methods to be associated with the event.
6. Select 'Create' to save the new event.

Edit Existing Events

1. Navigate to the escalation level you would like to edit your event on.
2. Select the event on the calendar.
3. Change the contact, duration, schedule, or delivery methods based on your preference.
4. Select the 'Update' button to save your changes.
 - Update: This instance - Updates that single instance.
 - Update: All instances - Updates all events associated with the events recurring schedule on that escalation level.

Delete Existing Events

1. Navigate to the escalation level you would like to delete your event on.
2. Select the event on the calendar.
3. Select the 'Delete' button on the event.
 - Delete: This instance - Deletes that single instance.
 - Delete: All instances - Deletes all events associated with the events recurring schedule on that escalation level.

Schedule Recurring Events

1. Navigate to the escalation level you would like to schedule your recurring event on.
2. Select the event on the calendar.
3. Select the schedule you would like to activate.
 - Daily - Every (*total days*) day(s) - eg. Every 5 days.
 - Weekly - Every (*total weeks*) week(s) on: (days) - eg. Every 2 weeks on Monday and Tuesday.
 - Monthly - Every (*total months*) month(s):
 - Day of Month - eg. Monthly on the 2nd and 5th days of the month.
 - Day of Week - eg. Monthly on the 1st Sunday and 2nd Sunday and 2nd Monday.
 - Yearly - Every (*total years*) - eg. Every 2 years.

Clone Events

1. Navigate to and select the event you would like to clone.
2. Select the 'Clone' button on the event edit menu.
3. Select the escalation level you would like to clone the event to.

Default Event Times

You can set a default start and end time for all of your new events added to the calendar. By default, the global start and end times are set to 12:00 AM - 11:59 PM (24 hours). This can be changed to your preference.

Escalation Levels

View Escalation Levels

1. Select the drop-down menu in the middle next to Escalation Levels.
2. Select the escalation level in the drop-down menu you would like to go to.
 - You can also navigate back and forth to escalation levels in sequential order using the left and right arrows.

Add Escalation Levels

1. Select the plus sign in the top right corner.
2. Enter a name for the calendar
3. Add the number of times you want to repeat that escalation level.
4. Add the amount of time we should wait before leaving that escalation level (none required for terminating steps).
5. Add the next escalation level in the rotation or terminate if this is one single escalation level.

Edit Escalation Levels

1. Select the drop-down menu in the middle next to Escalation Levels.
2. Select the escalation level in the drop-down menu you would like to go to.
 - You can also navigate back and forth to escalation levels in sequential order using the left and right arrows.
3. Select the pencil icon in the top-right of your calendar.

Clone Escalation Levels

1. Select the drop-down menu in the middle next to Escalation Levels.
2. Select the escalation level in the drop-down menu you would like to go to.

- You can also navigate back and forth to escalation levels in sequential order using the left and right arrows.
- 3. Select the clone icon (*two sheets of paper*) in the top-right of your calendar.
- 4. Select the escalation in the drop-down you would like to clone the entire calendar to.

Delete Escalation Levels

1. Select the drop-down menu in the middle next to Escalation Levels.
2. Select the escalation level in the drop-down menu you would like to go to.
 - You can also navigate back and forth to escalation levels in sequential order using the left and right arrows.
3. Select the trash can icon in the top-right of your calendar.
4. Press Ok on the prompt to confirm the removal of that escalation level.
5. *Note:* Deleting an escalation level will break any escalations you had chained together and also remove any script relay triggers you had in place. When deleting an escalation level be sure to correct all the places the escalation level was referenced. Also deleting an escalation level CANNOT be undone.

Repeat Escalation Levels

You can repeat escalation levels any specified number of times before moving forward to the next escalation level in your calendar chain. This can help in instances where you have the same set of instructions to be repeated multiple times.

1. Select the drop-down menu in the middle next to Escalation Levels.
2. Select the escalation level in the drop-down menu you would like to go to.
 - You can also navigate back and forth to escalation levels in sequential order using the left and right arrows.
3. Select the pencil icon in the top-right of your calendar.
4. Add the number of times you want to repeat the escalation level in the repeat section.
5. Add the number of minutes to wait between each attempt.
6. Save.

Chain Escalation Levels

You can chain escalation levels together to build a flow process. (eg. Step 1, Step 2, Step 3)

1. Create two or more escalation levels.
2. Edit the escalation level that will serve as the first step in your process.
3. Link the primary escalation to the secondary escalation in the Next Escalation drop-down.
4. Set a wait time before continuing to the Next Escalation.
5. Repeat for as many steps as needed.

Export to Third-Party Calendar

You can export any escalation level to a third-party calendar for previewing with the custom .ics file provided for all escalation levels. The export will only have to be completed once and all updates will be sent to your calendar in real-time.

1. Select the escalation level you wish to export.
2. Select the calendar icon in the top right corner of the calendar.
3. Copy the link to the .ics file for that escalation level and import it into your calendar.
 - For more instructions on importing, please see your third-party calendar's support documentation.