



**CI | CA | CE | WI**

# **Production Release**

Monday, January 9, 2023



Gold  
Microsoft Partner





**CoreInteract**  
Workflow Call Transfer



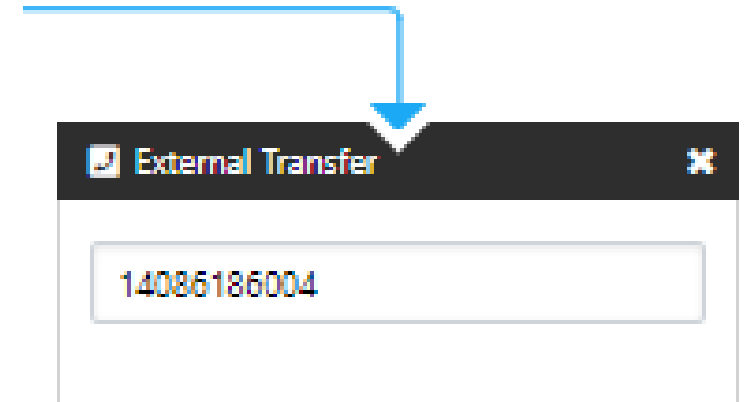
# CoreInteract Workflow Transfer

## Description

- Transfer Calls to an External Number
  - Use Case Example: Afterhours Answering Service
  - DTMF Capable

## Setup & Requirements











1. Confirm Outbound Policy is Assigned
2. Enable Resource Account
3. Configure with Workflow Builder
  - External Transfer Logic Card



# CoreInteract Workflow Transfer

## Enable Resource Account for External Call

The screenshot displays the 'Resource Management' interface. At the top, there is a navigation bar with the 'core interact' logo and a search bar. Below this, the 'Resource Accounts' tab is selected. A table lists resource accounts with columns for Display Name, Phone Number, User Principal Name, Calling Bot, and Status. The first row is highlighted, and a red box around the pencil icon in its action column is pointed to by a red arrow from a text box that reads 'Select the Resource Account & Pencil/Edit Icon'. The table shows 10 entries, and the status for all is 'Provisioned'. The bottom of the table indicates 'Showing 1 to 10 of 18 entries' and includes pagination controls.

Display Name	Phone Number	User Principal Name	Calling Bot	Status	
Altigen Demo 01	16693231101	altigendemo01@altigen.com	Primary Calling Bot	Provisioned	
Altigen Demo 02	16693231102	altigendemo02@altigen.com	Primary Calling Bot	Provisioned	
Altigen Demo 03	16693231103	altigendemo03@altigen.com	Primary Calling Bot	Provisioned	
Altigen Demo 04	16693231104	altigendemo04@altigen.com	Primary Calling Bot	Provisioned	
Altigen Demo 05	16693231105	altigendemo05@altigen.com	Primary Calling Bot	Provisioned	
Altigen Demo 05	16693231105	altigendemo05@altigen.com	Primary Calling Bot	Provisioned	
Altigen Demo 07	16693231107	altigendemo07@altigen.com	Primary Calling Bot	Provisioned	
Altigen Demo 08	16693231108	altigendemo08@altigen.com	Primary Calling Bot	Provisioned	
Altigen Demo 09	16693231109	altigendemo09@altigen.com	Primary Calling Bot	Provisioned	
Altigen DEMO 1	16693561437	clstagebot@altigen.com	Primary Calling Bot	Provisioned	

# CoreInteract Workflow Transfer

## Enable Resource Account for External Call

The screenshot displays the CoreInteract Resource Management interface. A modal window titled "Resource Account" is open, showing configuration options for a resource account. The modal has two steps: "1 Resource Account" and "2 Review".

The modal contains the following fields and controls:

- Display Name: AltiGen Demo 01
- Calling Bot: Primary Calling Bot
- Assign Number:
- Is Teams Service Number:
- Phone Number: 10093231101
- Unassign: [Unassign](#)
- Usage Location: Select
- Is Enabled For External Call:
- Next: [Next](#)

A red box highlights the "Is Enabled For External Call" checkbox, and a red arrow points from a text box to it. The text box contains the text "Enable for External Call Select Next".

The background interface shows a table of Resource Accounts with columns for Display Name and Phone Number. The table lists 18 entries, with the first 10 visible. The status of all accounts is "Provisioned".

Display Name	Phone Number
AltiGen Demo 01	10093231101
AltiGen Demo 02	10093231102
AltiGen Demo 03	10093231103
AltiGen Demo 04	10093231104
AltiGen Demo 05	10093231105
AltiGen Demo 07	10093231107
AltiGen Demo 08	10093231108
AltiGen Demo 09	10093231109
AltiGen DEMO 1	10093561437

# CoreInteract Workflow Transfer

## Enable Resource Account for External Call

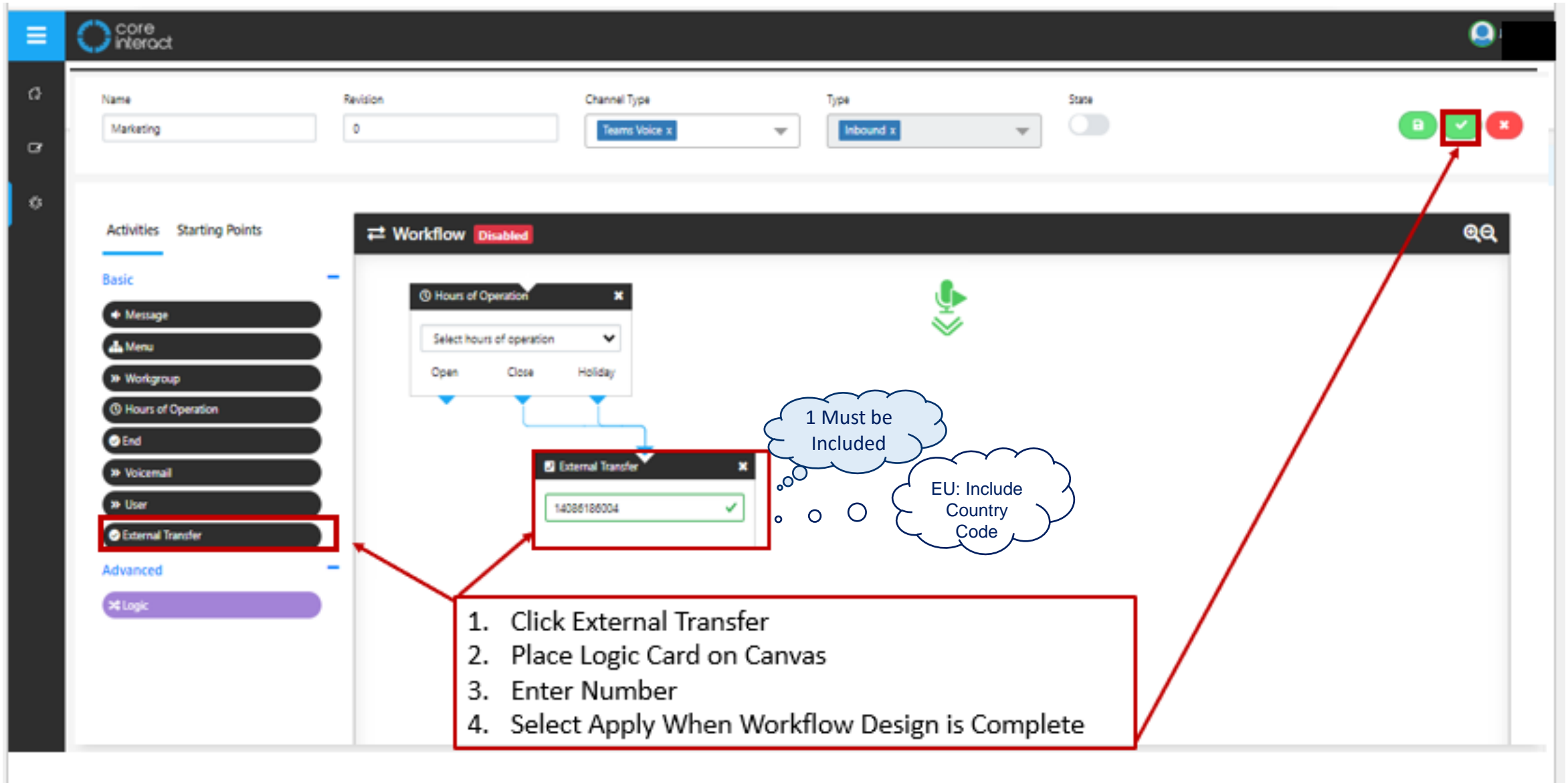
The screenshot shows the CoreInteract Resource Management interface. A modal window titled 'Resource Account' is open, showing the 'Review' step. The modal displays the following details for a resource account:

- Display Name:** Altigen Demo 01
- Phone Number:** +16893231101
- User Principal Name:** altigendemo01@altigen.com
- Calling Bot:** Primary Calling Bot
- Has virtual license:** Yes
- Is Teams Service Number:** No
- Usage Location:** -
- Is Enabled External Call:** Yes

A red box highlights the 'Is Enabled External Call' field, and a callout box with the text 'Confirmation Shows Enabled' points to it. The background shows a table of resource accounts with columns for Display Name and Phone Number.

Display Name	Phone Number
Altigen Demo 01	16893231101
Altigen Demo 02	16893231102
Altigen Demo 03	16893231103
Altigen Demo 04	
Altigen Demo 05	
Altigen Demo 05	16893231105
Altigen Demo 07	16893231107
Altigen Demo 08	16893231108
Altigen Demo 09	16893231109
Altigen DEMO 1	16893561437

## Workflow Builder



The screenshot displays the CoreInteract Workflow Builder interface. At the top, there are fields for Name (Marketing), Revision (0), Channel Type (Teams Voice x), Type (Inbound x), and a State toggle. A green checkmark icon is highlighted with a red box. On the left, a sidebar lists activities: Message, Menu, Workgroup, Hours of Operation, End, Voicemail, User, External Transfer (highlighted with a red box), and Logic. The main canvas shows a workflow diagram with an 'Hours of Operation' card connected to an 'External Transfer' card. The 'External Transfer' card contains the number '14086188004' and a green checkmark. Hand-drawn annotations include a thought bubble saying '1 Must be Included' and another saying 'EU: Include Country Code'. A red box at the bottom contains a numbered list of instructions.

Workflow Disabled

Hours of Operation

Select hours of operation

Open Close Holiday

External Transfer

14086188004

1 Must be Included

EU: Include Country Code

1. Click External Transfer
2. Place Logic Card on Canvas
3. Enter Number
4. Select Apply When Workflow Design is Complete



**CoreInteract**

Power BI Integration

Power BI Outbound Calls







# CoreInteract Power BI Report Access Integration with CI for Admin

## Description

- Access CI Power BI Reports from CoreInteract for Admin

## Setup & Requirements

1. Customers with Power BI
  - Configure Power BI Standard Report Tabs Workgroup, Agent, Call Volume by Hour
  - Customers will be able to configure report access for reports they create by entering the associated URL from Power BI.
2. Customers without Power BI
  - Tab will be Shown / No Data Present
  - If interested in adding reports, reach out to Altigen account manager.

# CoreInteract Power BI Report Integration

core Interact

TPCloud02 Administrator Available

- SETTING
- REPORT SETTING
- POWER BI REPORT**
- RESOURCE MANAGEMENT

115 Users

40 Workgroups

1 Source

Configuration Tasks

Complete the following tasks to finish your CoreInteract Configuration

- Grant Tenant Admin consent to calling bot
- Grant Tenant Admin consent to voicemail bot
- Create voicemail bot resource account
- Setup working hours and holidays
- Create groups of users to receive calls
- Create your first workflow

Training & Guides

- Managing a Team
- Training for Admins
- Positive Team Building
- Custom Settings

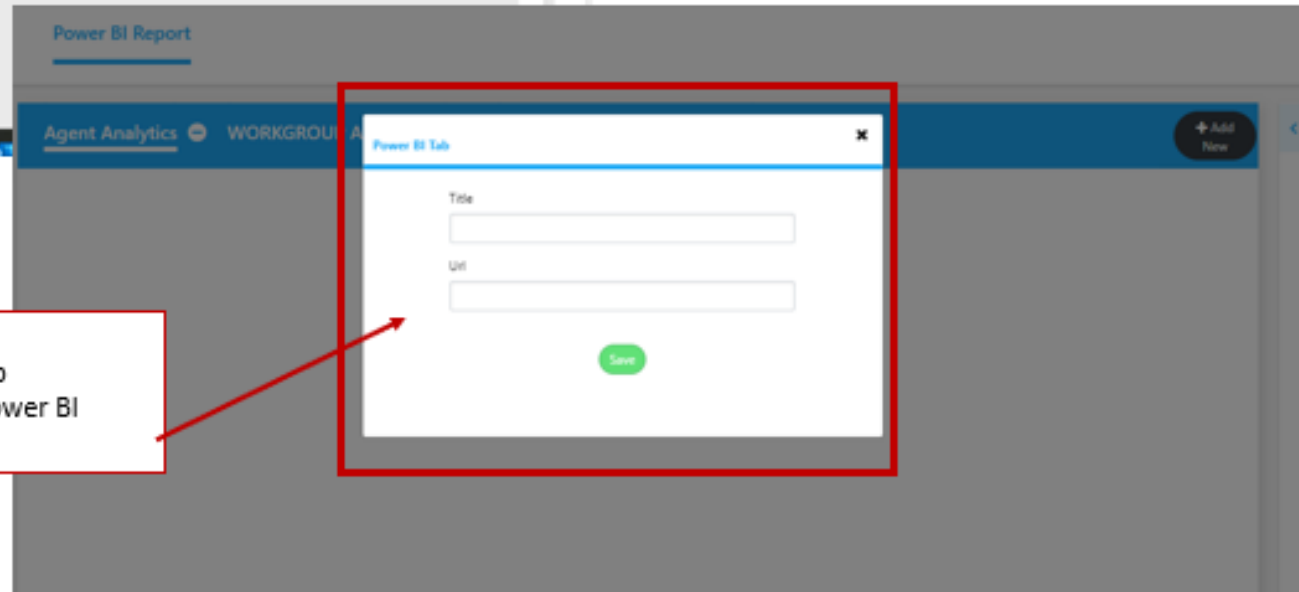
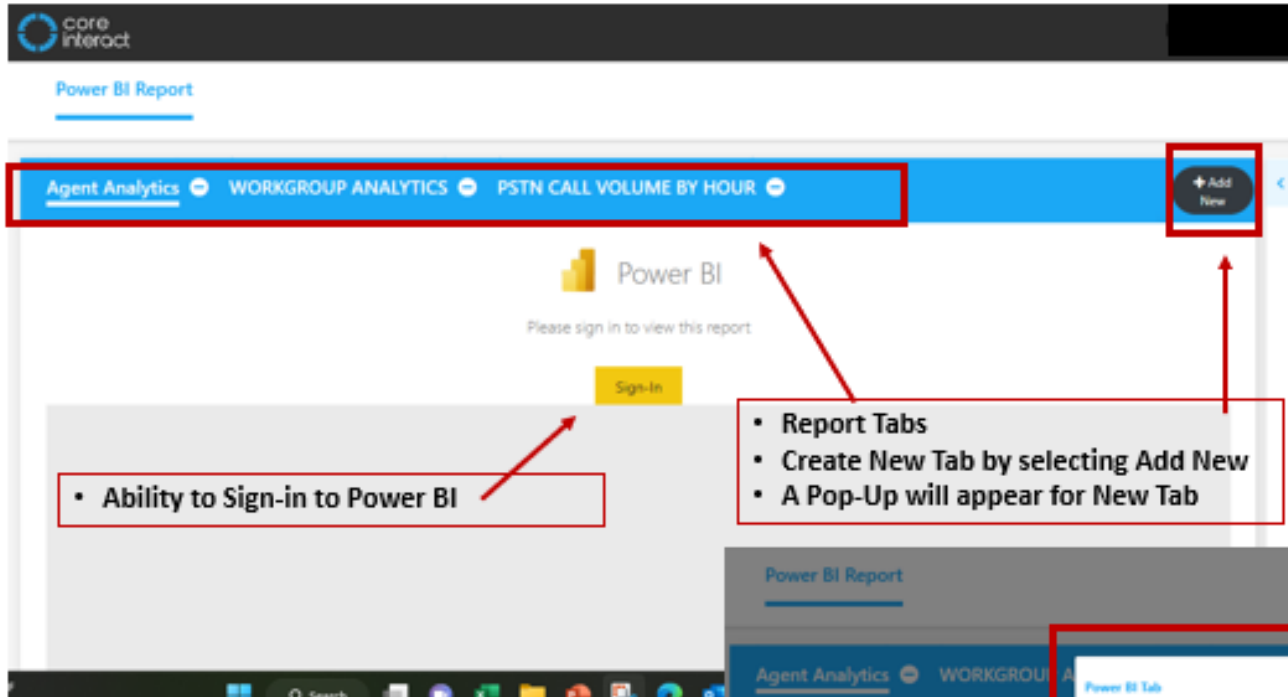
Activate Windows  
Go to Settings to activate Windows.

jeffrey x jeffrey2 x jeffrey3 x  
jeffrey4 x

Average jeffrey2 jeffrey jeffrey3 jeffrey4



# CoreInteract Power BI Report Integration





# CoreInteract Power BI Outbound Calls Detail

## Description

- Outbound Teams Call Detail Page added to Standard Power BI Reports

Report	Description
Agent Analytics	Call Detail Over Time & By Hour Specific to Agent
Workgroup Analytics	Call Detail Over Time & By Hour Specific to Workgroup
Call Volume by Hour	Call Volume by Hour Agents & Workgroups

## Setup & Requirements

1. Customers with Power BI
  - Outbound call detail will be included in existing standard reports
2. Customers without Power BI
  - If interested in adding reports, reach out to Altigen account manager.



# **CoreAttendant**

## Call Controls



## Description

- Call Controls within CoreAttendant (CA)
  - Hold
  - Blind Transfer \*DTMF Capable
  - Consult
  - End Call

## Setup & Requirements

1. Un-Install CA App
2. Install New CA App



# CoreAttendant Call Controls

The screenshot displays the CoreAttendant interface. On the left, a sidebar shows the main number 'Main Number Altigen' (4085979000) and a call log for '4085136784' (4085136784) at 00:40. The main area features a 'Frequent Contacts' list with 12 entries, including Linda Walker (QA Lead, Away), Jeffrey Chou (Away), Timothy Witton (Group Lead, Offline), Kevin Yang (Offline), Alex Trenton (QA engineer, Available), Carlin Mcadams (Senior QA engineer, Offline), Lewis Hamilton (Engineer, Offline), Maracay White (PM, Offline), tp2 qa18 (Assistant, Away), TP2 QA2 (Engineer, Offline), tp2 qa4 (Offline), and Wade Lin (Available). A red-bordered box on the left contains the note: 'Note: Once call is answered from Teams, call controls will appear in CA Conversation Window.' A red-bordered box on the right shows a Teams pop-up for 'CA Test02' with the text 'is calling you from a group' and a 'CT' button. A red arrow points from the text 'Answer from Teams Pop-up' to this pop-up. The bottom of the interface shows 'Hotkey Support' and 'Language English'.

# CoreAttendant Call Controls

The screenshot displays the QA CoreAttendant interface. At the top left, a call card for 'Main Number Altigen' (4085979000) is shown with a duration of 00:00:19. A red box highlights four call control icons: a pause icon, a transfer icon, a consult icon, and an end call icon. Below the call card, the 'Active' tab is selected, showing a call log entry for 4085136784 with a duration of 01:00. Red arrows point from the call control icons to the 'Hold', 'Blind Transfer', 'Consult Transfer', and 'End' labels in the call log. The right side of the interface features a 'Frequent Contacts' section with a grid of contact cards, including Linda Walker (QA Lead, Away), Jeffrey Chou (Away), Timothy Witton (Group Lead, Offline), Kevin Yang (Offline), Alex Trenton (QA engineer, Busy), Carlin Mcadamis (Senior QA engineer, Offline), Lewis Hamilton (Engineer, Offline), Maracay White (PM, Offline), tp2 qa18 (Assistant, Away), TP2 QA2 (Engineer, Offline), tp2 qa4 (Offline), and Wade Lin (Available). The bottom of the interface includes a 'Hotkey' button, a 'Support' link, and a 'Language English' dropdown menu.





# CoreAttendant Call Controls

## Hold

The screenshot displays the CoreAttendant interface with two windows. The top window shows an active call for 'Main Number Altigen' with a duration of 00:01:21. A red box highlights the call control bar, which includes a 'Hold' button (a square with two vertical bars) and other options like 'Transfer', 'Consult Transfer', and 'End'. A red arrow points from this 'Hold' button to a text box below. The bottom window shows a 'No active calls' status and a 'Hold Queue' for 'Main Number Altigen' with a duration of 00:00:01. This queue also has a red box highlighting its control bar, which includes an 'Un-Hold' button (a square with a play symbol) and other options. A red arrow points from this 'Un-Hold' button to the same text box below. The interface also features a 'Frequent Contacts' list on the left and right sides, with various contact cards showing names and status (e.g., 'Linda Walker QA Lead Away', 'Kevin Yang Offline').

- Click hold button to place active call on hold.
- Call will show in hold Queue with button options (un-hold, transfer, consult transfer, end)



# CoreAttendant Call Controls

## Blind Transfer

QA CoreAttendant

MN Main Number Altigen  
4085979000  
00:01:53

Active 1  
40 Hold Calls

Transfer

Frequent Contacts

- 1 Linda Walker  
QA Lead  
Away
- 8 Kevin Yang  
Offline
- Lewis Hamilton  
Engineer  
Offline

QA CoreAttendant

No active calls

Active 1 Hold 1

MN Main Number Altigen  
00:00:19

Frequent Contacts

- 1 Linda Walker  
QA Lead
- 2 Jeffrey Chou  
Assistant
- 4 Timothy Witton  
Group Lead

Transfer

Search User

Search User

Linda Walker  
QA Lead

- Click Transfer
- Pop-up – Type Name, Select User
- Click Transfer button

# CoreAttendant Call Controls

## Consult Transfer

- Click Consult Transfer button
- Pop-up add Name/Number, Search
- Click phone button to call

The screenshot displays the CoreAttendant software interface. At the top left, a call control panel for 'Main Number Altigen' (4085979000) is visible, with a red box highlighting the 'Consult Transfer' button (a blue square with a white person icon). Below this panel, a list of active calls is shown, including one for '4085136784'. A red arrow points from the 'Consult Transfer' button in the call list to a pop-up window titled 'Consult transfer'. This window features a search bar with 'Linda Walker' entered, a search icon, and a blue phone icon button. A red arrow points from the phone icon button to the 'Transfer' button at the bottom of the pop-up. The interface also shows a 'Frequent Contacts' list on the left and a 'Search User' field at the top right.

# CoreAttendant Call Controls

## Consult Transfer

QA CoreAttendant

MN Main Number Altigen  
4085979000  
00:00:19

Active 1 Hold 0

4085136784  
4085136784 01:09

Search User

Frequent Contacts 12

1 Linda QA Le Away

8 Kevir Offli

Lewi Engin Offli

TP2 Engin Offli

Linda Walker  
00:00:04

Stop consult Transfer

Hotkey Support Language English

- User Answers
- Both Users Consult
- Click Transfer When ready to transfer caller



## Description

- Customized Contact Information Card Pop-up
  - Power Apps
- CRM or Application of Choice
  - Specific Pop-up Information Fields
  - Professional Services Required
  - Examples: Salesforce, Dynamics, Sharepoint, etc.

## Setup & Requirements

1. Un-Install CoreEngage
2. Install New CoreEngage
3. CoreInteract for Admin (Web Version)
  - Workgroup Setting
  - Advance Setting - Set URL
4. Power Apps License Required

Example of Contact Information Card Pop-up from SharePoint file

The screenshot displays the CoreEngage Connect user interface. At the top, there is a navigation bar with 'CoreEngage', 'Home', 'My Conversation History', and 'Voicemails'. On the right side of the top bar, there is a 'Ready' status indicator and a user profile icon. The main interface is divided into several sections:

- Left Panel:** Shows a large 'AM' indicator, 'Alligen Main Number 1408513653 jeffrey', and a list of recent conversations with details like '1 10-61-1-61 • (+1 408-513-6784) 00:00:12 • jeffrey'.
- Center Panel:** Contains a 'Contact Information' tab and a 'Conversation Logs' tab. A red-bordered pop-up card is overlaid on this panel, containing a form with the following fields:
  - First Name:
  - Last Name:
  - Phone Number:
  - Membership:
  - Operator:
  - Finance:
  - Foods:An 'Update' button is located at the bottom of the form.
- Right Panel:** Includes a 'Pick Conversation' section with buttons for 'jeffrey', 'jeffrey4', and 'jeffrey5'. Below it is a 'Workgroup Details' section with buttons for 'jeffrey', 'jeffrey4', and 'jeffrey5'. At the bottom is an 'Agent' table with the following data:

Agent	Current State
Alex Trenton	Ready



# CoreEngage Connect

## CI for Admin - Workgroup Settings - Advance Setting

Workgroup Settings

General Distribution Owners **Advance Setting** Members

Name  
Marketing

Keyword  
Koh

Time Zone  
(GMT-05:00) Eastern Time (US & Canada)

Next

Workgroup Settings

General Distribution Owners **Advance Setting** Members

Calling Pop-up Enabled

Pop-up Url

Back Save





## Description

- Call Controls within CoreEngage (CE)
  - Hold
  - Blind Transfer
  - Consult
  - End Call

## Setup & Requirements

1. Un-Install CE App
2. Install New CE App

# CoreEngage New Home Page Layout

The screenshot displays the CoreEngage (QA) interface with several key components highlighted by red boxes and labels:

- Conversation Queue:** Located on the left, it shows a queue with 1 item and 0 holds. A call card for "Altigen Main Number - (+1 408-597-9000)" is visible, with a label "Conversation Queue" pointing to it.
- Conversation Logs:** A central table listing recent conversations. A label "Conversation Log replaced blank Contact Information Card" points to the first row.
- Pick Workgroups to Take Conversations:** A label at the top right points to the "Pick Conversation" section, which includes buttons for "jeffrey", "jeffrey4", and "jeffrey5".
- Agent Status:** The bottom right shows the agent "Alex Trenton" with a "Not Ready" status.

Icon	Call ID	Contact Name	Duration	Time
AM	1	Altigen Main Number	1m 10s	10:44
LW	1	Linda Walker		10:41
UU	1	+14085136853		10:35
1	1	14085136853	15s	10:33
1	1	10-61-1-61	45s	10:32
AM	1	Altigen Main Number	42s	10:30
1	1	14085136853	24s	10:21
1	1	10-61-1-61	16s	10:20
AM	1	Altigen Main Number	3m 50s	10:16
UU	1	+14085136853		10:01
UU	1	+14085136853		09:58
1	1	14085136853	25s	09:55
1	1	10-61-1-61	31s	09:53

# CoreEngage Call Controls

The screenshot displays the CoreEngage (OA) user interface. On the left, there is a contact card for 'AM' (Aligen Main Number) and a call queue with two items. The main area shows 'Contact Information' and 'Conversation Logs' tabs, with the 'Conversation Details' section containing a rich text editor and a 'Submit' button. On the right, there are sections for 'Pick Conversation' and 'Workgroup Details'. A red box highlights a Teams pop-up window in the bottom right corner, which shows a call from 'CI Test01' with 'CT' initials and call control icons. A red arrow points from a text box 'Answer from Teams Pop-up' to this pop-up.

**Note:**  
Once call is answered from Teams, call controls will appear in CE Conversation Window.

Answer from Teams Pop-up



# CoreEngage Call Controls

The screenshot displays the CoreEngage (QA) interface. At the top, there are navigation links for Home, My Conversation History, and Voicemails. The main area is divided into several sections:

- Contact Information:** Includes fields for Full Name (Altigen Main Number), Company (Altigen), Job Title (Main Number), Email 1 (user@email.com), Business 1, Mobile 1, and Account Code.
- Conversation Details:** Features a rich text editor with formatting options (B, I, U, link, list, indent, font size, font color, background color) and a text input field.
- Pick Conversation:** Shows buttons for selecting conversations (jeffrey, jeffrey4, jeffrey5).
- Workgroup Details:** Shows buttons for selecting agents (jeffrey, jeffrey4, jeffrey5).
- Agent:** Lists agents and their current states (e.g., Alex Trenton - Busy).

On the left side, there is a queue list with two items. A red box highlights four call control icons: a pause icon, a refresh icon, a person icon, and a red end call icon. Red arrows point from these icons to labels: 'Hold' (from the pause icon), 'Blind Transfer' (from the refresh icon), 'Consult Transfer' (from the person icon), and 'End' (from the red end call icon).





# CoreEngage Outbound Calling

## Description











- Initiate Outbound Calls

## Setup & Requirements

1. Un-Install CE App
2. Install New CE App
3. Confirm Outbound Policy is Assigned
4. Enable Resource Account for External Call
5. Confirm Each User has DID

# CoreEngage Outbound Calling

The screenshot displays the 'Resource Management' section of the CoreEngage interface. It features a table of 'Resource Accounts' with columns for Display Name, Phone Number, User Principal Name, Calling Bot, and Status. The first row is highlighted, and a red box around the pencil icon in the action column is pointed to by a red arrow from a text box that reads 'Select the Resource Account & Pencil/Edit Icon'. The interface also includes a search bar, an 'Add New' button, and pagination controls at the bottom.

Display Name	Phone Number	User Principal Name	Calling Bot	Status	
Altigen Demo 01	16693231101	altigendemo01@altigen.com	Primary Calling Bot	Provisioned	
Altigen Demo 02	16693231102	altigendemo02@altigen.com	Primary Calling Bot	Provisioned	
Altigen Demo 03	16693231103	altigendemo03@altigen.com	Primary Calling Bot	Provisioned	
Altigen Demo 04	16693231104	altigendemo04@altigen.com	Primary Calling Bot	Provisioned	
Altigen Demo 05	16693231105	altigendemo05@altigen.com	Primary Calling Bot	Provisioned	
Altigen Demo 05	16693231105	altigendemo05@altigen.com	Primary Calling Bot	Provisioned	
Altigen Demo 07	16693231107	altigendemo07@altigen.com	Primary Calling Bot	Provisioned	
Altigen Demo 08	16693231108	altigendemo08@altigen.com	Primary Calling Bot	Provisioned	
Altigen Demo 09	16693231109	altigendemo09@altigen.com	Primary Calling Bot	Provisioned	
Altigen DEMO 1	16693561437	cLstagebot@altigen.com	Primary Calling Bot	Provisioned	



# CoreEngage Outbound Calling

The screenshot displays the CoreEngage Resource Management interface. A modal window titled 'Resource Account' is open, showing configuration options for a resource account. The modal has two steps: '1 Resource Account' and '2 Review'. The 'Resource Account' step includes the following fields:

- Display Name: Altigen Demo 01
- Calling Bot: Primary Calling Bot
- Assign Number:
- Is Teams Service Number:
- Phone Number: 16693231101
- Usage Location: Select

A red box highlights the 'Is Enabled For External Call' toggle switch, which is currently turned on. A red arrow points from a text box 'Enable for External Call Select Next' to this toggle, and another red arrow points from the toggle to a 'Next' button.

Display Name	Phone Number	Status
Altigen Demo 01	16693231101	Provisioned
Altigen Demo 02	16693231102	Provisioned
Altigen Demo 03	16693231103	Provisioned
Altigen Demo 04	16693231104	Provisioned
Altigen Demo 05	16693231105	Provisioned
Altigen Demo 07	16693231107	Provisioned
Altigen Demo 08	16693231108	Provisioned
Altigen Demo 09	16693231109	Provisioned
Altigen DEMO 1	16693561437	Provisioned

# CoreEngage Outbound Calling

The screenshot shows the CoreEngage Resource Management interface. A modal window titled 'Resource Account' is open, displaying details for 'Altigen Demo 01'. The modal has two steps: '1 Resource Account' and '2 Review'. The details shown are:

- Display Name: Altigen Demo 01
- Phone Number: +16893231101
- User Principal Name: altigendemo01@altigen.com
- Calling Bot: Primary Calling Bot
- Has virtual license: Yes
- Is Teams Service Number: No
- Usage Location: -
- Is Enabled External Call: Yes

A red box highlights the 'Is Enabled External Call' field, and a callout box points to it with the text 'Confirmation Shows Enabled'. The background shows a table of resource accounts with columns for Display Name and Phone Number.

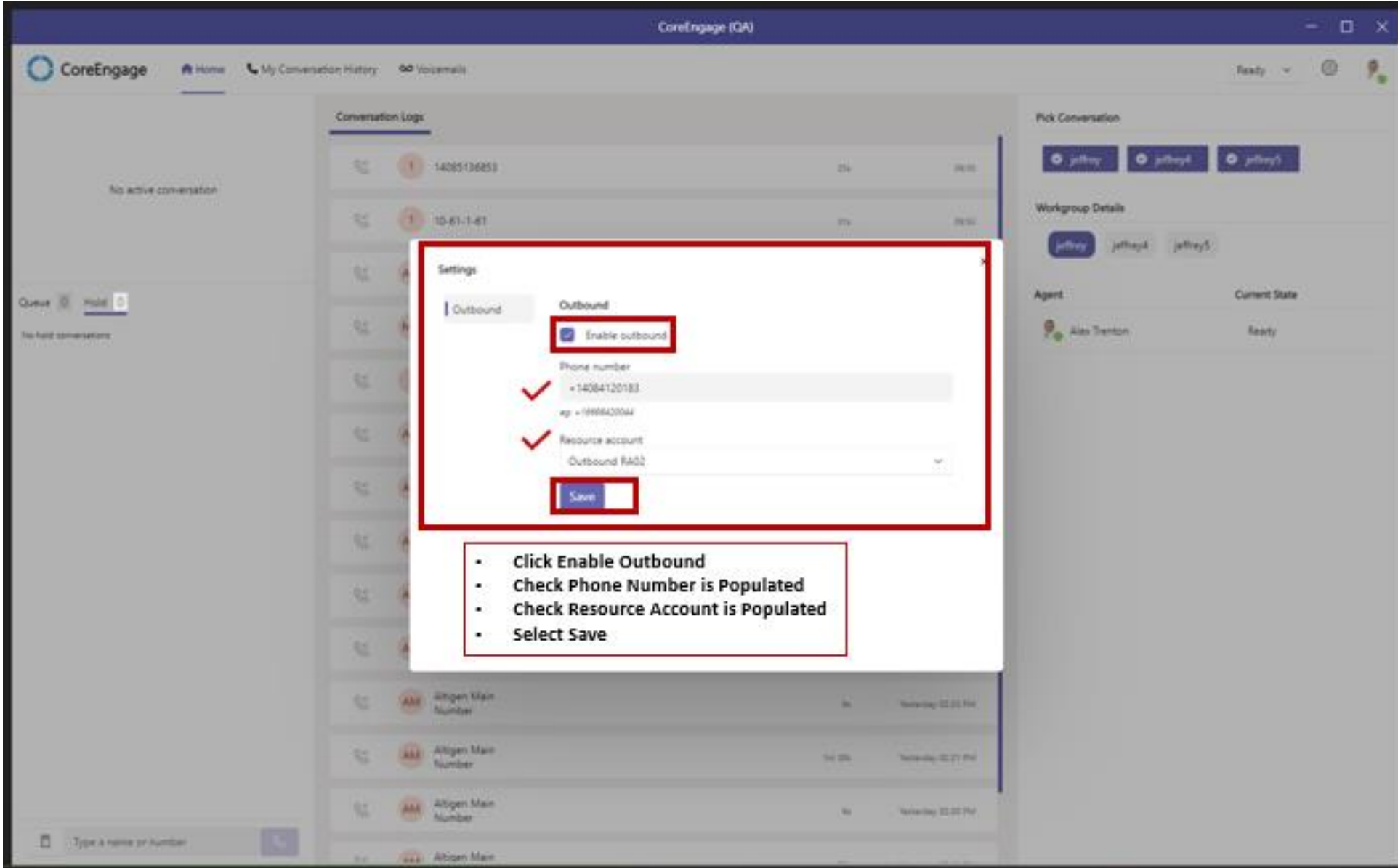
Display Name	Phone Number
Altigen Demo 01	16893231101
Altigen Demo 02	16893231102
Altigen Demo 03	16893231103
Altigen Demo 04	
Altigen Demo 05	
Altigen Demo 05	16893231105
Altigen Demo 07	16893231107
Altigen Demo 08	16893231108
Altigen Demo 09	16893231109
Altigen DEMO 1	16893561437

# CoreEngage Outbound Calling

The screenshot displays the CoreEngage (QA) user interface. At the top, there is a navigation bar with the CoreEngage logo, a home icon, and links for 'My Conversation History' and 'Voicemails'. A red box highlights a gear icon in the top right corner, with a red arrow pointing to it from a text box that says 'Click Gear Setting Icon'. Below the navigation bar, the interface is divided into three main sections: 'Conversation Logs', 'Pick Conversation', and 'Workgroup Details'. The 'Conversation Logs' section shows a list of call records with columns for call type (UU, AM, LW), contact name/number, duration, and time. The 'Pick Conversation' section shows buttons for 'jeffrey', 'jeffrey4', and 'jeffrey5'. The 'Workgroup Details' section shows buttons for 'jeffrey', 'jeffrey4', and 'jeffrey5'. Below this, an 'Agent' section shows 'Alex Trenton' with a 'Ready' status. At the bottom, there is a search bar with the placeholder text 'Type a name or number' and a call button.

Call Type	Contact	Duration	Time
UU	+14086140274		13:27
UU	+14086140274		13:28
AM	Altigen Main Number	3m 55s	10:56
AM	Altigen Main Number	3m 56s	10:50
AM	Altigen Main Number	2m 36s	10:44
LW	Linda Walker	1m 18s	10:41
UU	+14085136853		10:35
1	14085136853	15s	10:33
1	10-61-1-61	45s	10:32

# CoreEngage Outbound Calling



CoreEngage (QA)

CoreEngage Home My Conversation History Voicemails Ready

Conversation Logs

No active conversation

Queue Hold 0 No held conversations

Pick Conversation

Workgroup Details

Agent Current State

Alan Trenton Ready

Settings

Outbound

Enable outbound

Phone number

+14084120183

✓

Resource account

Outbound RA02

Save

- Click Enable Outbound
- Check Phone Number is Populated
- Check Resource Account is Populated
- Select Save

# CoreEngage Outbound Calling

The image displays two screenshots of the CoreEngage (QA) interface. The top screenshot shows the main dashboard with a search bar highlighted. The bottom screenshot shows the dial pad pop-up with a phone icon highlighted. A list of instructions is provided in a red-bordered box.

- Click Dial Pad Icon
- Dial Pad Pop up
- Click Numbers
- Click Phone Icon to Place Outbound Call

# CoreEngage Outbound Calling

The screenshot displays the CoreEngage user interface. On the left, there is a call control panel with a '1' in a red circle, a red 'End Call' button, and a numeric keypad. The main area is divided into three sections: a 'Conversation Log' table, a 'Pick Conversation' section, and a 'Workgroup Details' section. The 'Conversation Log' table contains the following data:

Icon	Number	Status	Time
📞	14081136853	In	10:01
📞	10-81-1-81	In	10:01
📞	Aligen Main Number	In	10:01
📞	14081136853	In	10:01
📞	10-81-1-81	In	10:01
📞	Aligen Main Number	In	10:01
📞	+14081136853	In	10:01
📞	+14081136853	In	10:01
📞	14081136853	In	10:01
📞	10-81-1-81	In	10:01
📞	Aligen Main Number	In	10:01
📞	Main Number Aligen	In	10:01
📞	10-81-1-81	In	10:01

The 'Pick Conversation' section shows three buttons labeled 'jillkey1', 'jillkey4', and 'jillkey5'. The 'Workgroup Details' section shows three buttons labeled 'jillkey1', 'jillkey4', and 'jillkey5'. The 'Agent' section shows 'Alex Thornton' with a 'Busy' status.

A red box highlights a call flow diagram on the right side of the interface. The diagram shows a sequence of events: 'Teams Rings User First', 'User Answers', and 'Then Teams Ring Outbound Number'. A red arrow points from this box to a call flow diagram on the right side of the interface. The diagram shows a call from 'Outbound RAGZ' to a user, with a 'OR' button and a 'Call' button.



 **CoreEngage**  
Queue View



# CoreEngage Queue View

## Description

- All calls in queue are in view for all users in a workgroup to see the activity of the workgroup Queues they are assigned.

## Setup

1. Un-Install CE App
2. Install New CE App



# CoreEngage Queue View

- Select Queue to View Calls in Queue
- Select Hold to view Calls on Hold

The screenshot displays the CoreEngage Queue View interface. At the top, there is a navigation bar with the CoreEngage logo, 'Home', 'My Conversation History', and 'Voicemails' links. The user's status is shown as 'Not Ready'. The main content area is divided into three sections:

- Queue View:** A box on the left shows a list of calls in the queue. It includes a 'Queue' tab with a count of 3 and a 'Hold' tab with a count of 0. The list contains three items:
  - AM Altigen Main Number • (+1 408-597-9000) 00:00:41 • jeffrey
  - 1 10-61-1-61 • (+1 408-513-6764) 00:00:22 • jeffrey
  - 1 14085136853 • (+1 408-513-6853) 00:00:17 • jeffrey
- Conversation Logs:** A central list of conversation logs with columns for call type (MN, I, AM), number, duration, and time. The first few entries are:
  - MN Main Number Altigen 0s Yesterday 04:02 PM
  - I 10-61-1-61 0s Yesterday 04:02 PM
  - AM Altigen Main Number 27s Yesterday 04:01 PM
- Agent and Workgroup Details:** On the right, there is a 'Pick Conversation' section with buttons for 'jeffrey', 'jeffrey4', and 'jeffrey5'. Below it is a 'Workgroup Details' section with buttons for 'jeffrey', 'jeffrey4', and 'jeffrey5'. At the bottom right, an 'Agent' section shows 'Alex Trenton' with a 'Current State' of 'Not Ready'.



 **Workgroup Insights**



# Workgroup Insights Dashboard

## Description

- Permission Management
  - Easy access from Workgroup Insights Dashboard
- Supervisor Join
  - Join Active Conversations

## Setup

- Nothing required for new features



 **Workgroup Insights**  
Permission Management

# Workgroup Insights Dashboard

## Permission Management

The screenshot displays the 'QA WG Insights' dashboard. At the top, there are navigation links for 'QA WG Insights', 'Workgroup Insights', and 'About'. Below this is a list of workgroup members: 'jethay', 'jethay2', 'jethay3', 'jethay4', and 'jethay5'. A red box highlights this list, and a red arrow points from a text box to it. The text box contains the following instructions:

- Select Workgroup to Manage Permissions
- Click Gear Settings Icon

The gear settings icon is also highlighted with a red box. The dashboard is divided into several sections:

- Workgroup Stats:** A grid of metrics including Total Agents (1), Available (1), Away (0), Busy (0), and Offline (0). Below this are metrics for Total Conversations (6), Completed Conversations (3), Queue Overflows (0), and Queue Timeouts (2). Further down are Active Conversations (0), Average Convo Time (2m 9s), Queued Conversations (0), and Average Time in Queue (2m 31s). The bottom row shows Abandoned Conversations (1), Abandoned Rate (0.17), Answer Rate (0.50), and Workgroup Voicemails (2).
- Workgroup Team Stats:** A table listing agents with columns for Agent, State, Completed Conversations, Active Conversations, Average Conversation Time, and Total Conversation Time. One agent, Alex Trenton, is listed with a state of 'Not Ready', 3 completed conversations, 00:00 active conversations, 51s average conversation time, and 2m 31s total conversation time.
- Workgroup call volume by hour of day:** A line chart showing call volume from 12 am to 08 pm. The chart shows a significant peak around 10 am. The legend indicates four data series: Abandoned (pink), Total (blue), Completed (teal), and Voicemails (purple).



# Workgroup Insights Dashboard

## Permission Management

Pop-up Window to access and manage settings related to the workgroup identified.

Workgroup Settings

- General
- Distribution
- Owners
- Members
- Voicemail
- Music on hold
- Advance

QA WG Insights Workgroup Insights About

jeffrey jeffrey2 jeffrey3 jeffrey4 jeffrey5

Workgroup Stats

1	1	0	0	0
Total Agents	Available	Away	Busy	Offline

Workgroup Team Stats

Agent	State	Completed Conversations	Active Conversations	Average Conversation Time	Total Conversation Time
		3	00:00	53s	2m 19s

6 Total Conversations

3 Completed Conversations

0 Active Conversations

2m 9s Average Convo Time

1 Abandoned Conversations

0.17 Abandoned Rate

Workgroup call volume by hour of day

Hours

Abandoned Total Completed Voicemails

Workgroup Settings

General

Name jeffrey

Keyword jeffrey

Time Zone GMT+08:00 Taipei

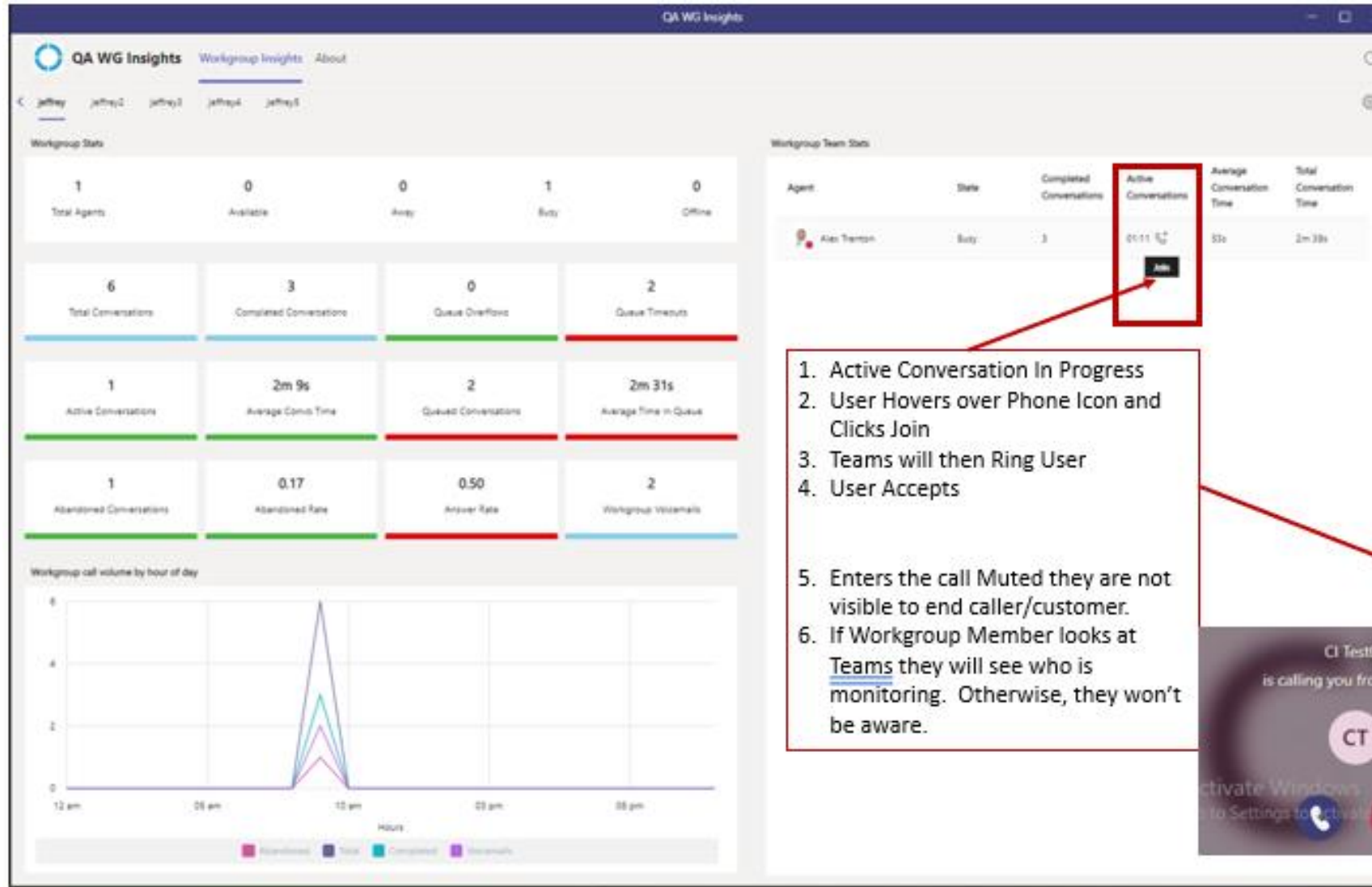
Save



 **Workgroup Insights**  
**Supervisor Join**

# Workgroup Insights Dashboard

## Supervisor Join



1. Active Conversation In Progress
2. User Hovers over Phone Icon and Clicks Join
3. Teams will then Ring User
4. User Accepts
5. Enters the call Muted they are not visible to end caller/customer.
6. If Workgroup Member looks at Teams they will see who is monitoring. Otherwise, they won't be aware.





# Workgroup Insights Dashboard

## Supervisor Join

1. Enters the call Muted they are not visible to end caller/customer.

**Note:**  
If Workgroup Member looks at Teams, they will see who is monitoring. Otherwise, they won't be aware.

Agent	State	Completed Conversations	Active Conversations	Average Conversation Time	Total Conversation Time
Alan Tomson	Busy	3	0:28	3:0	2m 30s

# Workgroup Insights Dashboard

## Supervisor Join

1. Enters the call Muted they are not visible to end caller/customer.

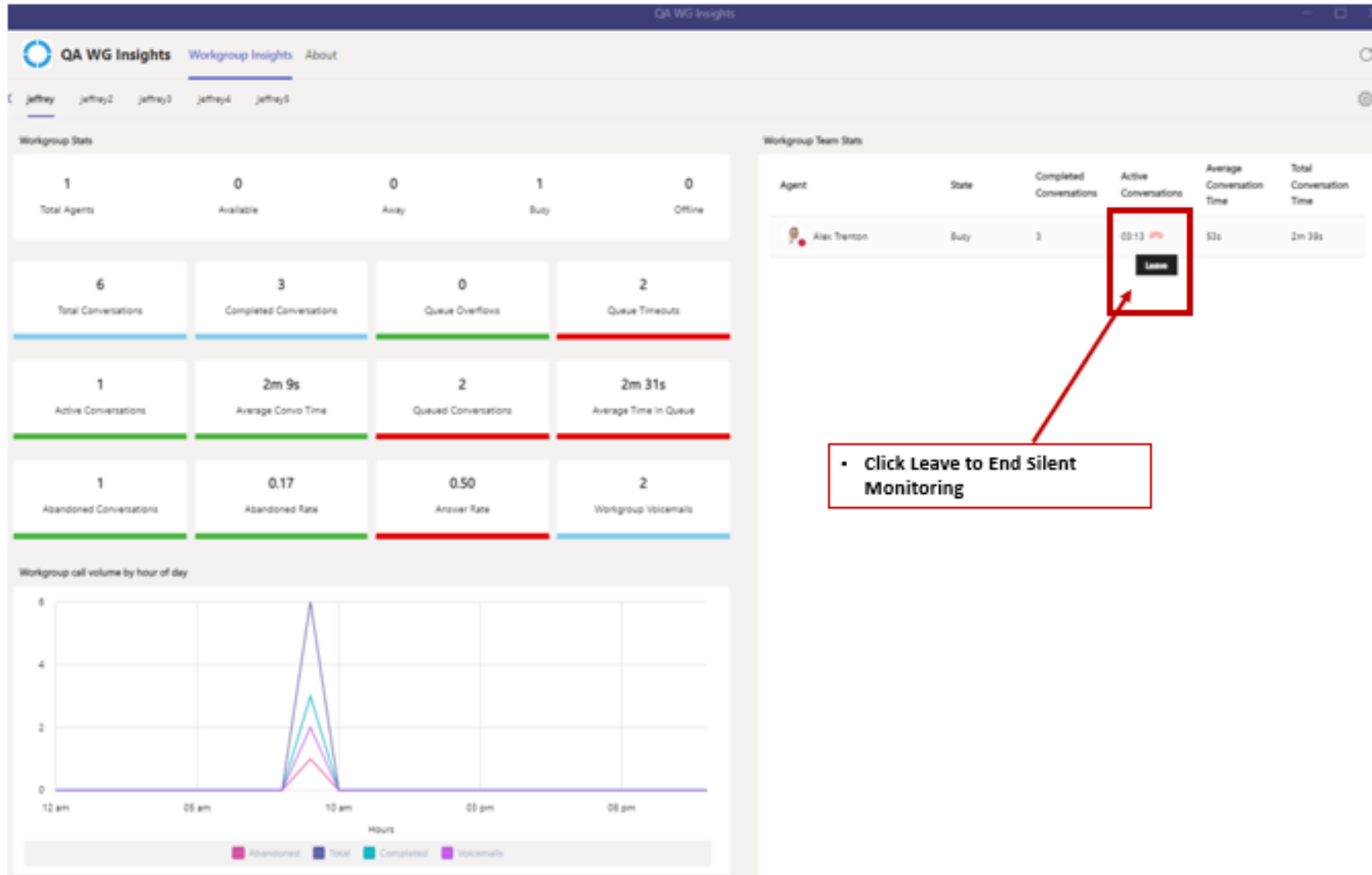
**Note:**  
If Workgroup Member looks at Teams, they will see who is monitoring. Otherwise, they won't be aware.

Agent	State	Completed Conversations	Active Conversations	Average Conversation Time	Total Conversation Time
Alan Tanton	Busy	3	0:28	3:0	2m 30s



# Workgroup Insights Dashboard

## Supervisor Join



**CI | CA | CE | WI**  
**Production Release**  
**1/9/2023**



Gold  
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