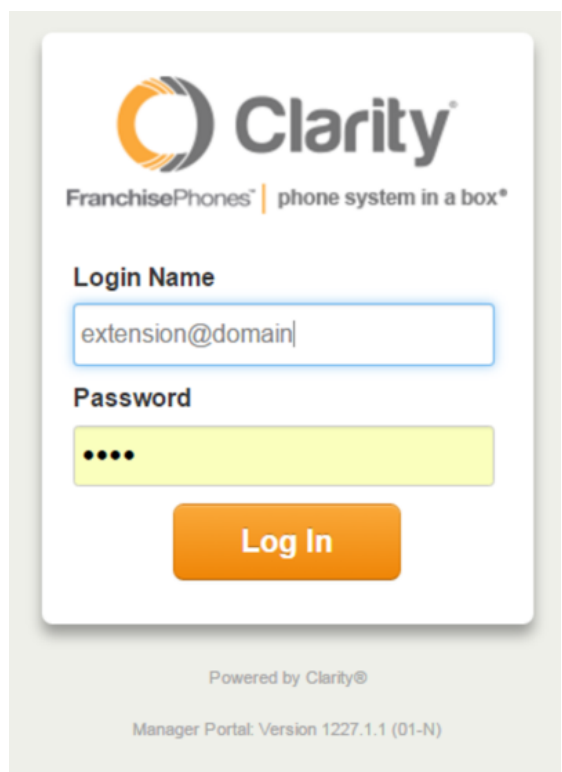


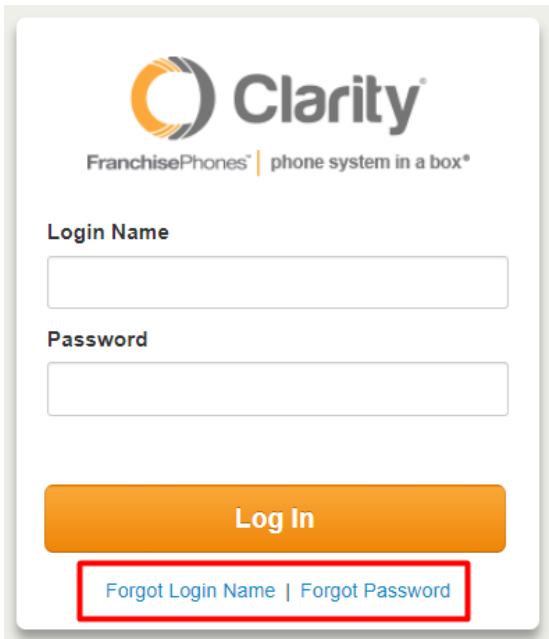
## Setting Up Your Call Center Email Reports is as Easy 1, 2, 3

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1. Navigate to **portal.clarityvoice.com**, you should see the login page:

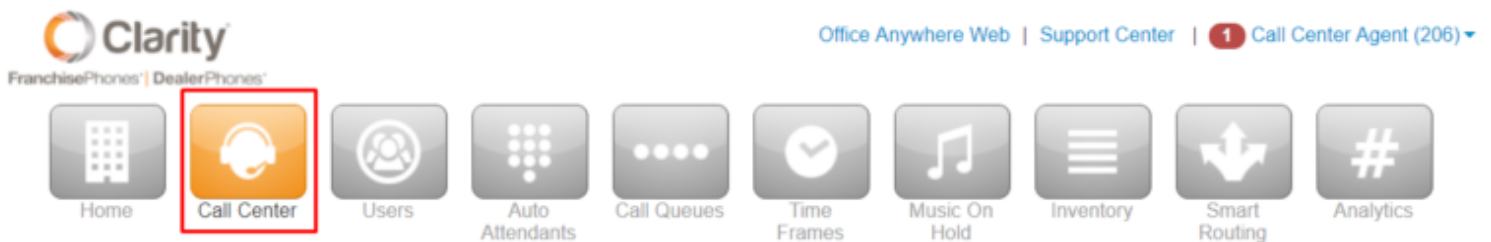
The image shows the Clarity login page. At the top is the Clarity logo, which consists of an orange circle with a grey 'C' inside, followed by the word 'Clarity' in a grey sans-serif font. Below the logo is the text 'FranchisePhones | phone system in a box\*'. The login form has two fields: 'Login Name' with a blue border and 'Password' with a yellow background. The 'Login Name' field contains the text 'extension@domain'. The 'Password' field contains four black dots. Below the fields is an orange 'Log In' button. At the bottom of the page, it says 'Powered by Clarity®' and 'Manager Portal: Version 1227.1.1 (01-N)'.

2. Enter your **Extension** and **Domain**, for example, 200@handyman, along with your password. If you don't know your password, click **Forgot Password** to have a password reset email sent to you. **Click Login.**

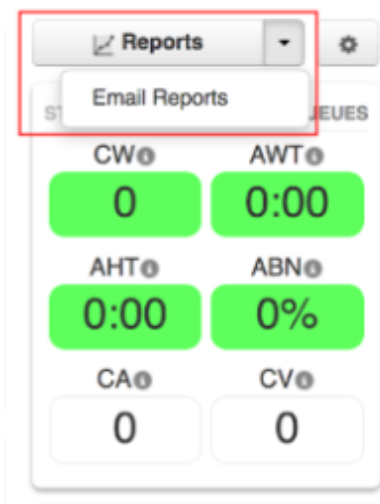


The image shows the Clarity login page. At the top is the Clarity logo with the tagline "FranchisePhones® | phone system in a box®". Below the logo are two input fields: "Login Name" and "Password". Under the "Password" field is an orange "Log In" button. At the bottom of the login area, there is a red rectangular box containing the links "Forgot Login Name" and "Forgot Password".

3. To set up your Email Reports, click the **Call Center** button at the top of the page.



4. Click the drop-down arrow next to **Reports** and select the new **Email Reports** option.



5. Email Reports can be sent in varying frequencies including monthly, weekly and daily.

## Report Email

Basic

Advanced

Select your report types and the frequency they are sent.

Types ⓘ

- ☒ Summary
- ☐ Call Queue
- ☐ Agent
- ☐ Dialed Number

Frequency ⓘ

- ☐ Monthly
- ☒ Weekly
- ☐ Daily

Reports include data up to the email send time.

Weekly Send Day ⓘ

Friday

Send Time ⓘ

17:00

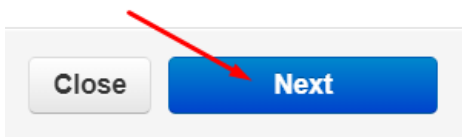
6. There are four types of reports:

- Call Queue
- Agent
- Dialed Number
- Summary (includes the top data from each of the other 3 reports)

7. Depending on the time period selected, you will be prompted to enter applicable time and date settings:

- **Daily Report** – set the time you would like to receive the report each day
- **Weekly Report** – set which day of the week and time to receive the report
- **Monthly Report** – set which day of the month to receive the report. The previous month's data will be emailed on that day. **\*NOTE: Setting the day to '1' will send the full previous month calendar**

8. Click Next to continue.



Close Next

9. In the advanced options you can customize the contents of the reports for the varying statistics. Up to *10 different statistics* may be chosen per report.

**Email Reports**

Basic Advanced

Customize your reports and add more recipients.

Statistics for Call Queues

- Call Volume
- Calls Handled
- Calls Offered
- Adjusted Calls Offered
- Voicemail
- Forward

Statistics for Agents

- Department
- Calls Handled
- Time Talking
- Average Talk Time
- Average Hold Time
- Average Handling Time

Statistics for Dialed Numbers

- Call Volume
- Calls Handled
- Calls Offered
- Adjusted Calls Offered
- Voicemail
- Forward

Hold Ctrl/CMD or Shift to select multiple.

Extra Email Addresses

- support@clarityvoice.com
- support@gmail.com

☒ Attach CSV data to Email

Close Back Save

10. There can be up to *four extra email addresses* added to receive the given reports.

11. If you would like the raw data, including all the available statistics, then check **Attach CSV to Email**.

12. When the configuration is complete, select **Save**. The Email Reports will then be scheduled.

## Modifying/Deleting Email Reports

To modify or delete any of the Email Reports, simply un-check the **Type** of report(s) and click **Save**.

If you have any additional questions or require additional assistance, please contact Support at 800.676.3995. We are available 8 AM to 9 PM EST, Monday through Friday. Or, feel free to contact us on our support page at: <https://clarityvoice.com/support/>

CLICK HERE FOR MORE CLARITY QUICK TIPS!