Web Portal Guide

KEYSTONE Answering Service™

KEYSTONEANSWERINGSERVICE.COM

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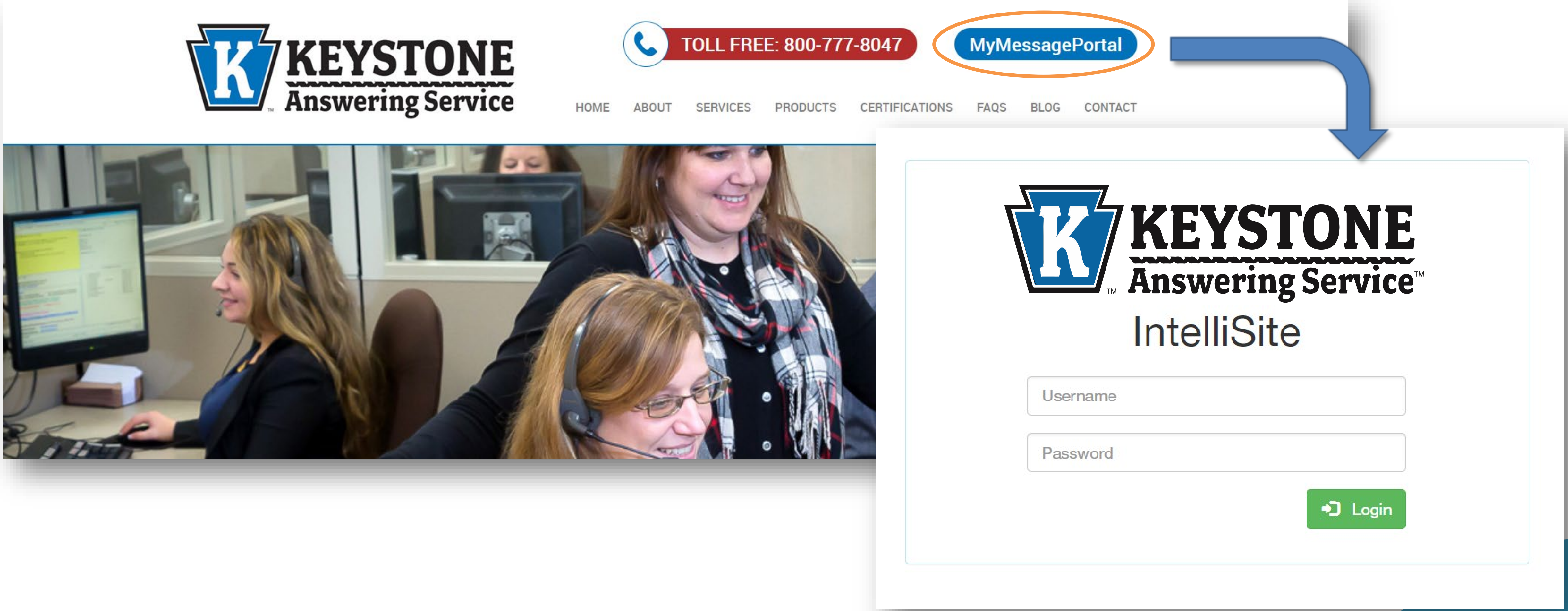
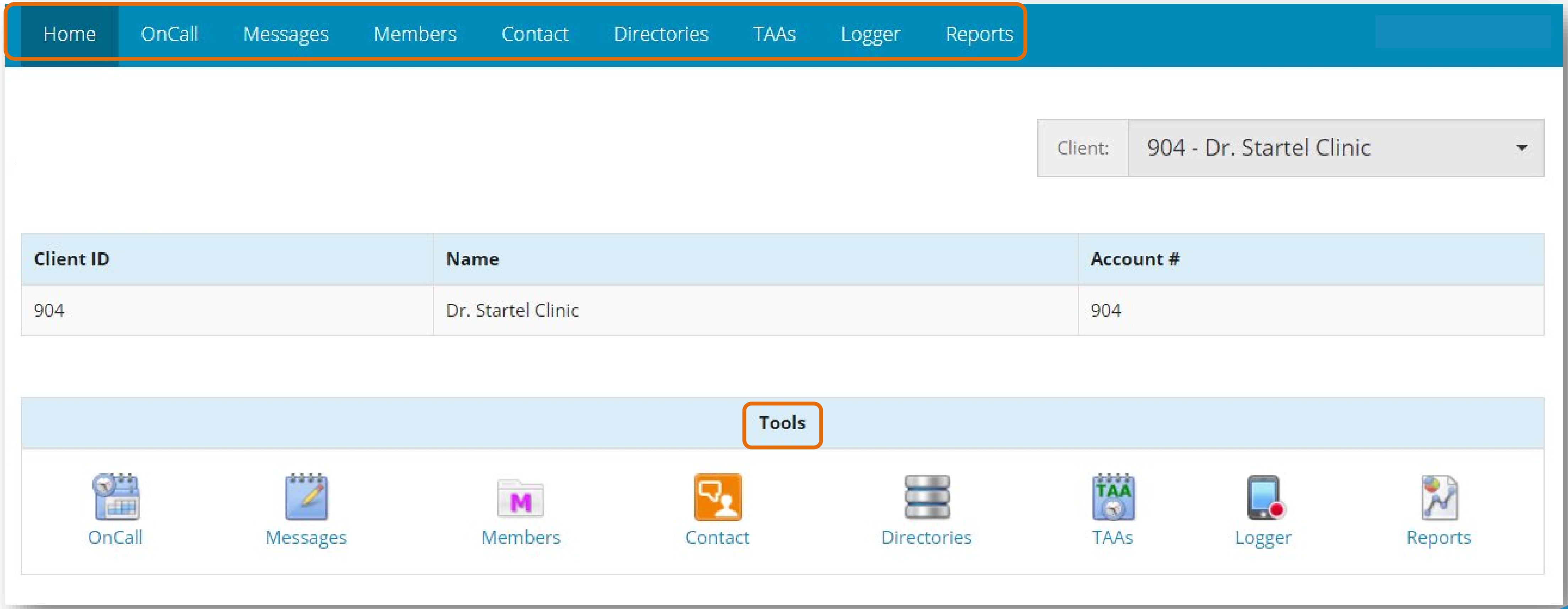
Logging into the Web Portal

To log into your Web Portal, also known as Intellisite, account, select “My Message Portal” on the very top banner of the Keystone Answering Service Website. You will use the provided Username and Password to enter your account.



Web Portal Homepage

From the Web Portal Homepage, you can select the appropriate option by either clicking the icons under the “Tools” section or using the top toolbar.

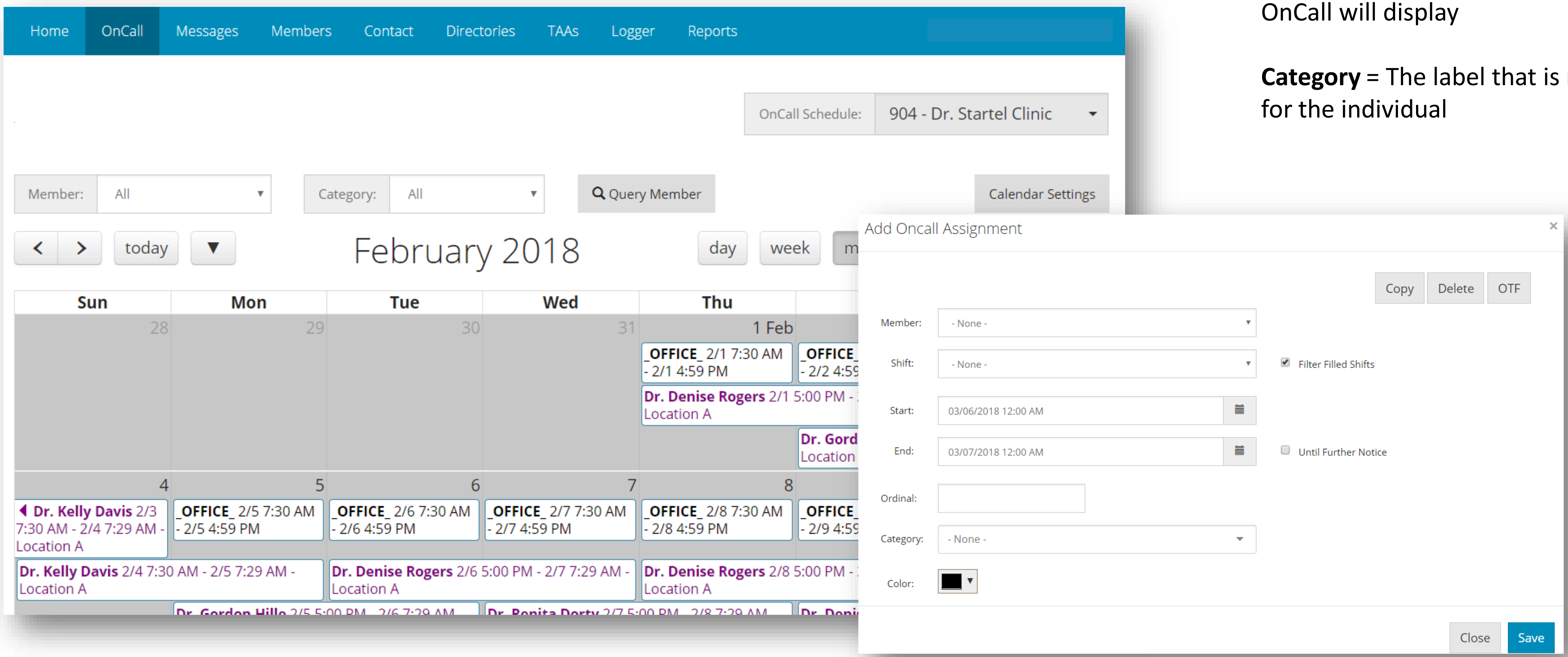


OnCall

To update your schedule using the OnCall calendar:

•Add an “OnCall Assignment”, click the specific day and enter in the member, shift and category.

•Insert the schedule for other team members, select the individual under the “Member” dropdown list.

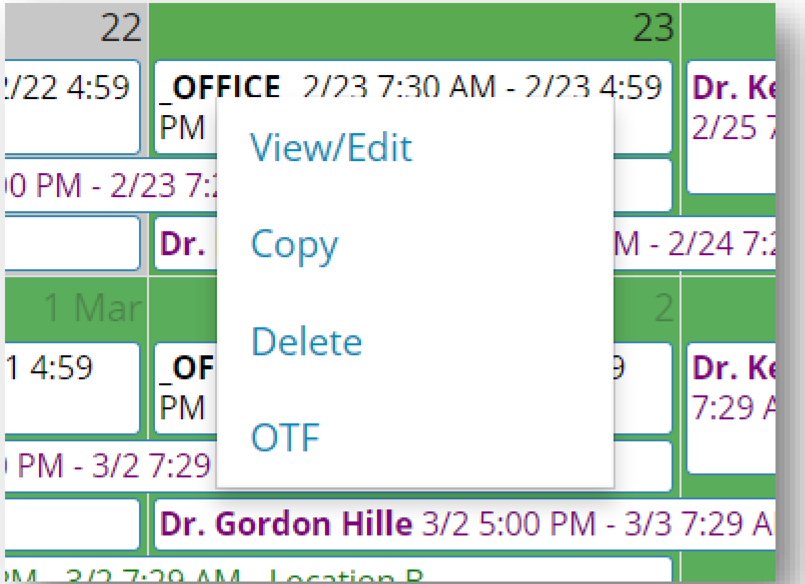


Member = Oncall Individual

Shift = Programmed Time for which particular OnCall will display

Category = The label that is most appropriate for the individual

OnCall

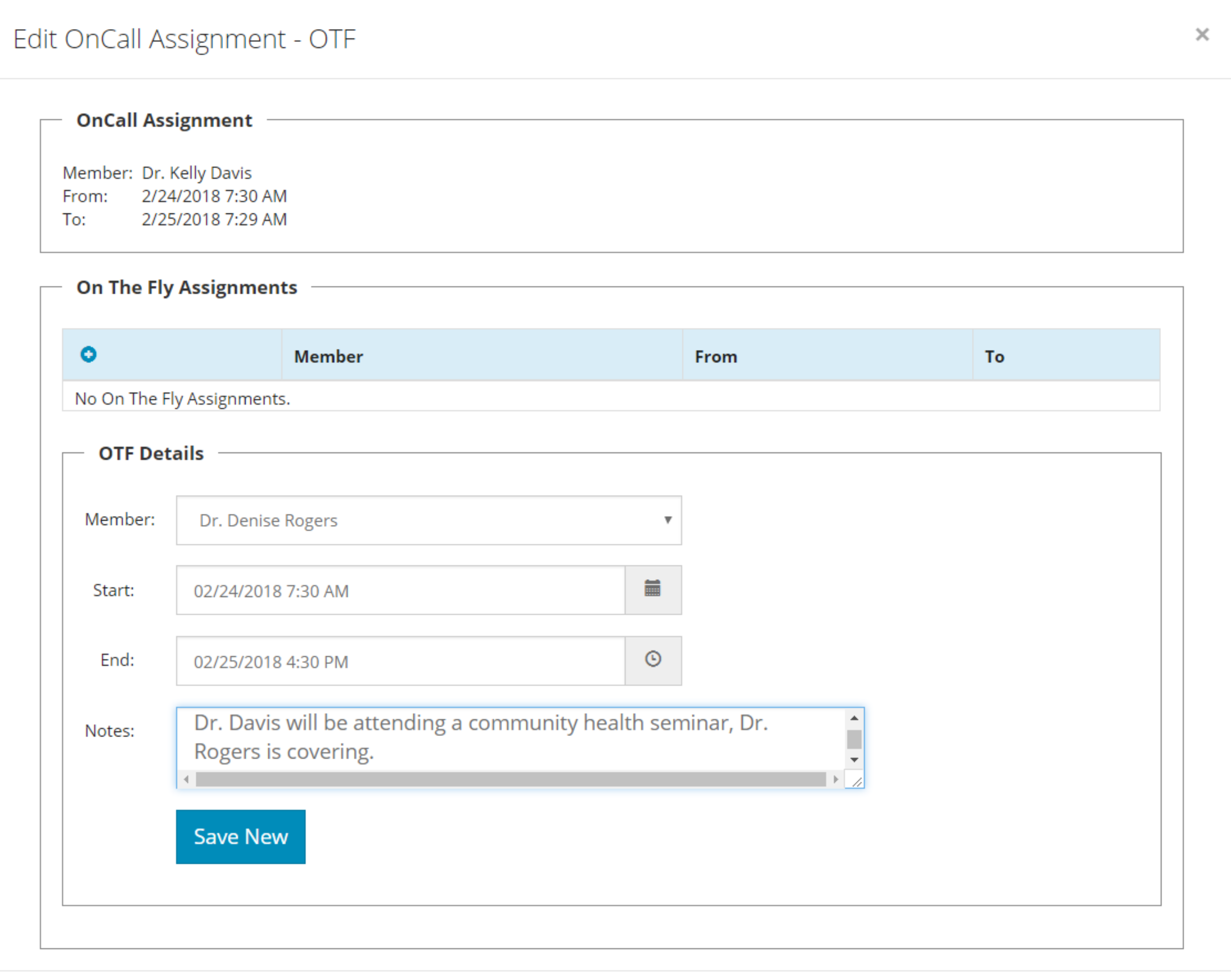


•**Delete** – Removes the selected OnCall Assignment

•**OTF** (On the Fly) – Allows you the option to assign another employee to cover part of the selected OnCall time

•**View/Edit** – Allows you to open the assignment you clicked on to make edits

•**Copy** – Makes input easier when individuals are OnCall for multiple days

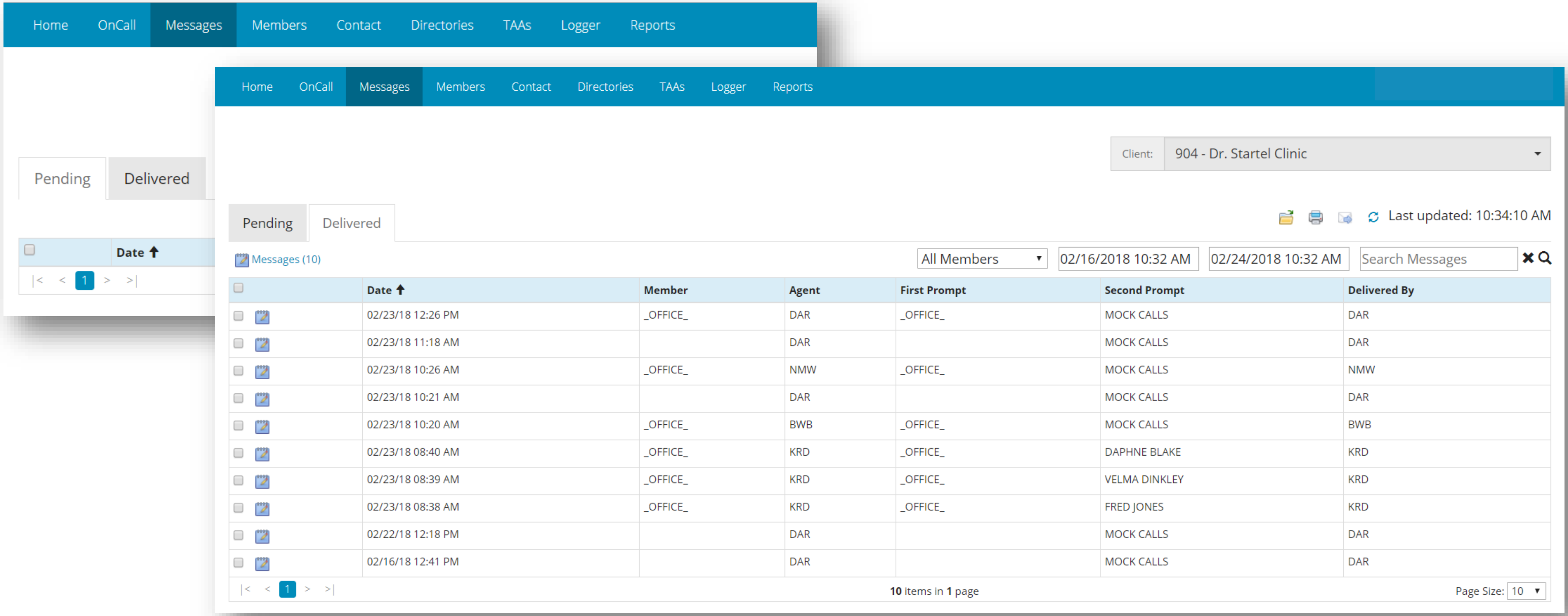


Messages

Have quick access to all your message slips in the "Messages" tab of the Web Portal.

This is your personal database of all your message slips. Instead of searching through your email for a specific message, you can easily search for it here.

Helpful hint: Pending messages are those that we are still working on, while delivered messages are finished messages.



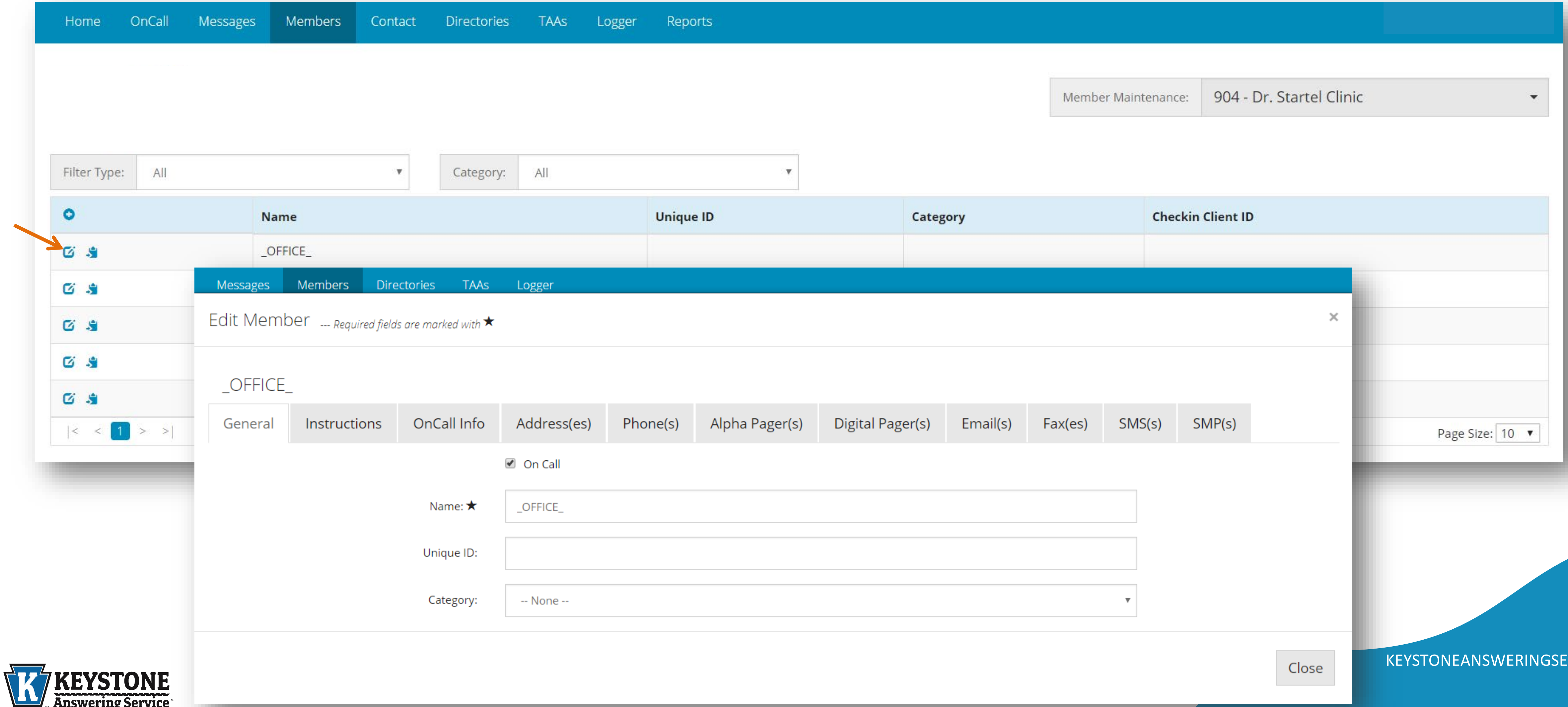
Date	Member	Agent	First Prompt	Second Prompt	Delivered By
02/23/18 12:26 PM	_OFFICE_	DAR	_OFFICE_	MOCK CALLS	DAR
02/23/18 11:18 AM		DAR		MOCK CALLS	DAR
02/23/18 10:26 AM	_OFFICE_	NMW	_OFFICE_	MOCK CALLS	NMW
02/23/18 10:21 AM		DAR		MOCK CALLS	DAR
02/23/18 10:20 AM	_OFFICE_	BWB	_OFFICE_	MOCK CALLS	BWB
02/23/18 08:40 AM	_OFFICE_	KRD	_OFFICE_	DAPHNE BLAKE	KRD
02/23/18 08:39 AM	_OFFICE_	KRD	_OFFICE_	VELMA DINKLEY	KRD
02/23/18 08:38 AM	_OFFICE_	KRD	_OFFICE_	FRED JONES	KRD
02/22/18 12:18 PM		DAR		MOCK CALLS	DAR
02/16/18 12:41 PM		DAR		MOCK CALLS	DAR

Members

The “Members” tab is where you can keep a current list of your employees. To edit an employee profile:

•Select the blue box in the far left column.

•In the popup box, add in all the relevant information for each individual.

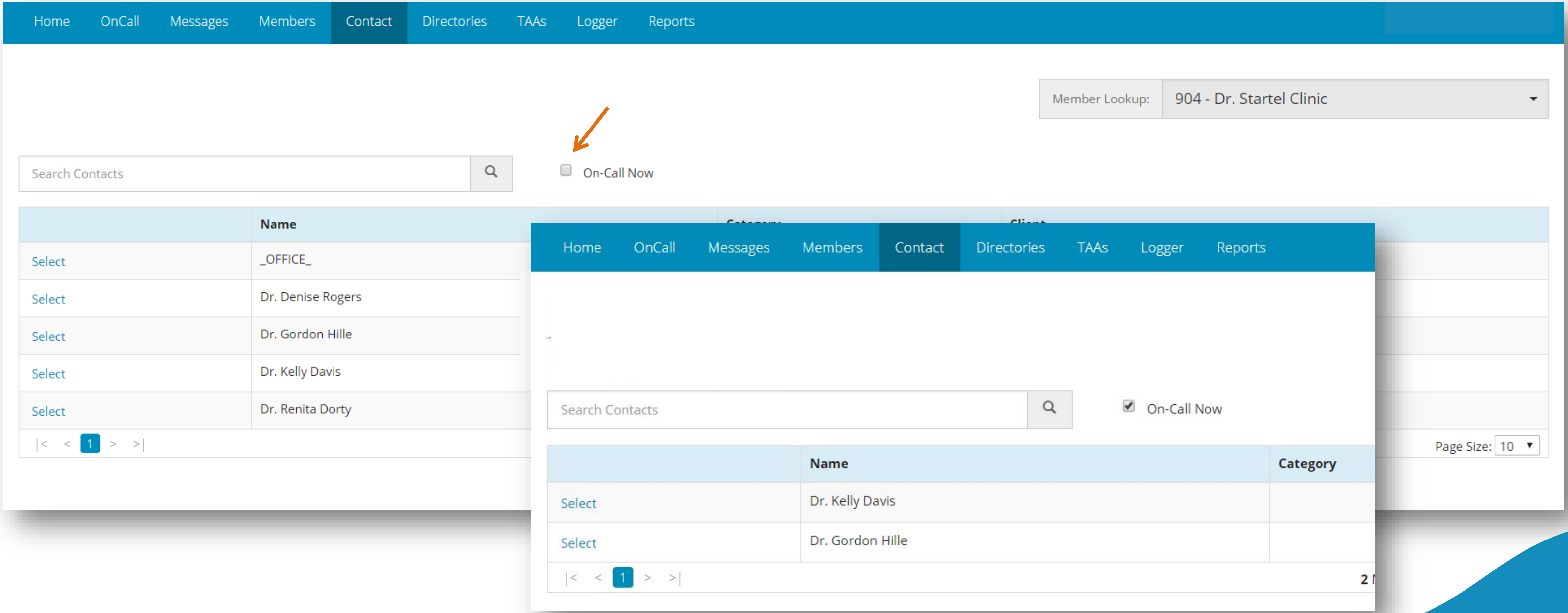


Contact

The “Contact” tab is where you can directly message a member or “OnCall” member from the portal. To send a message:

•Check the ‘OnCall Now’ option to filter to a list of members who are currently OnCall.

•‘Select’ the member you would like to contact. **Helpful hint: You can also do this from the full main list as well!**



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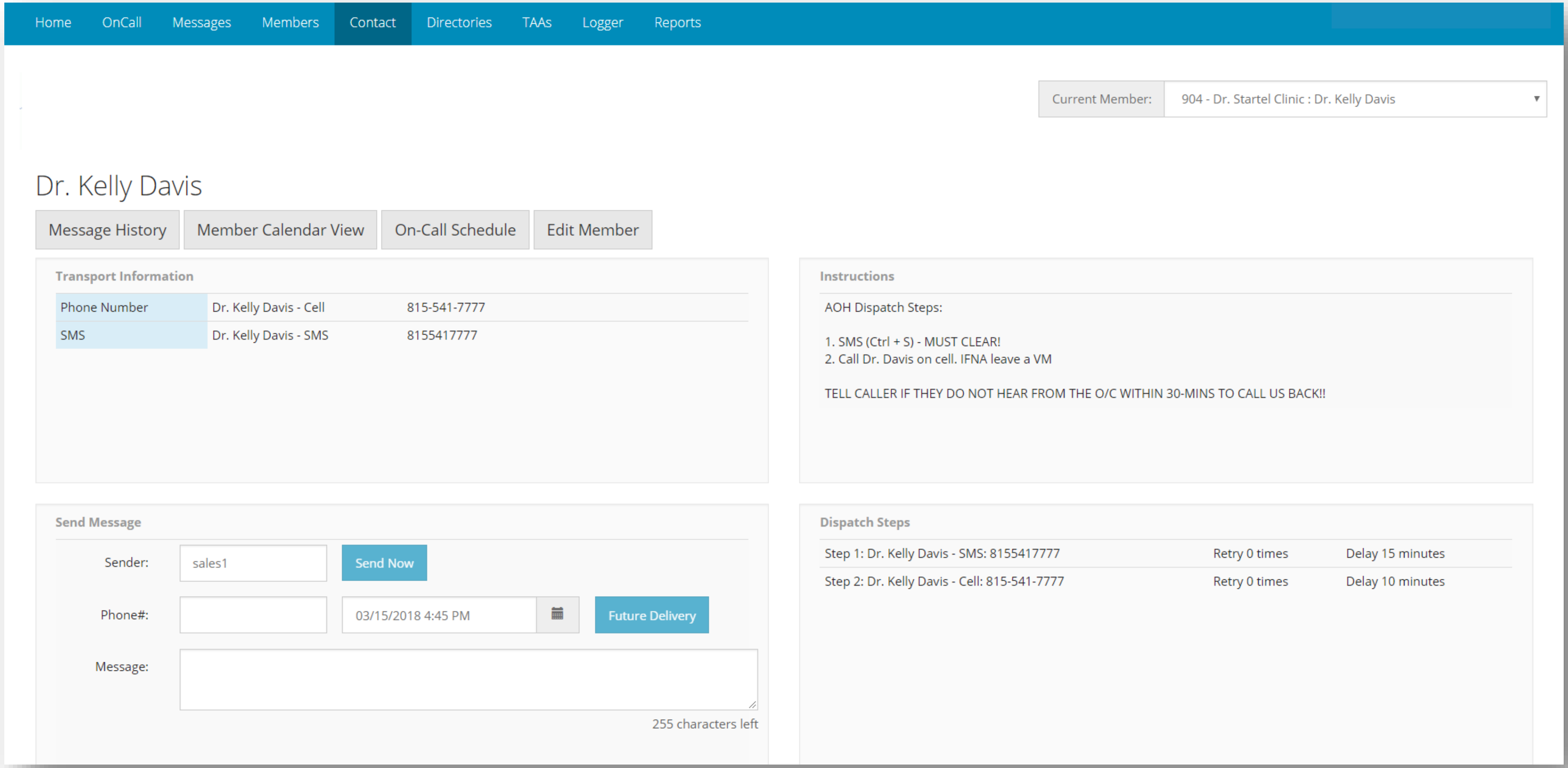
Contact

To contact a member utilizing the listed Dispatch Steps:

•Type the message in the 'Send Message' box.

•Click 'Send Now' or schedule the message for Future Delivery.



To View/Manage Members, you can click on:

•Message History

•Member Calendar View

•On-Call Schedule

•Edit Member

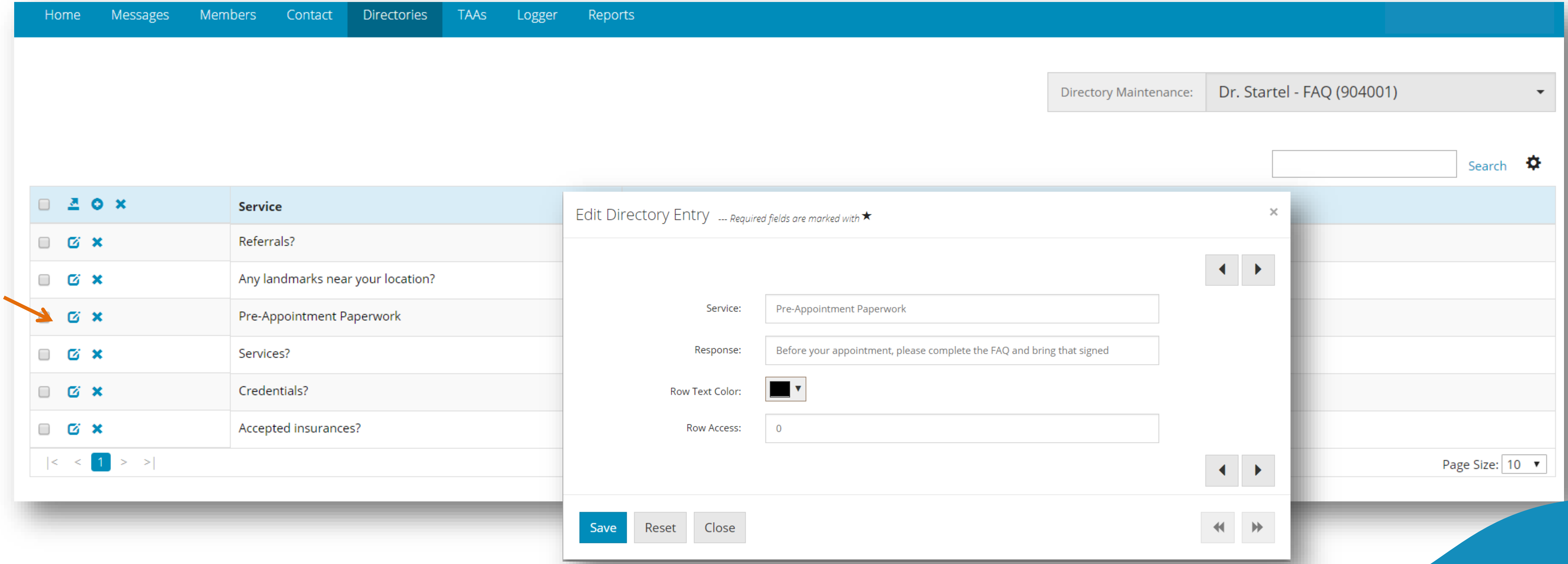
Directories

Review and update your frequently asked questions, zip codes and service areas in the “Directories” Tab.

To edit each row:

•Click the blue box in the far left column.

•Enter in the updated information in the popup box.



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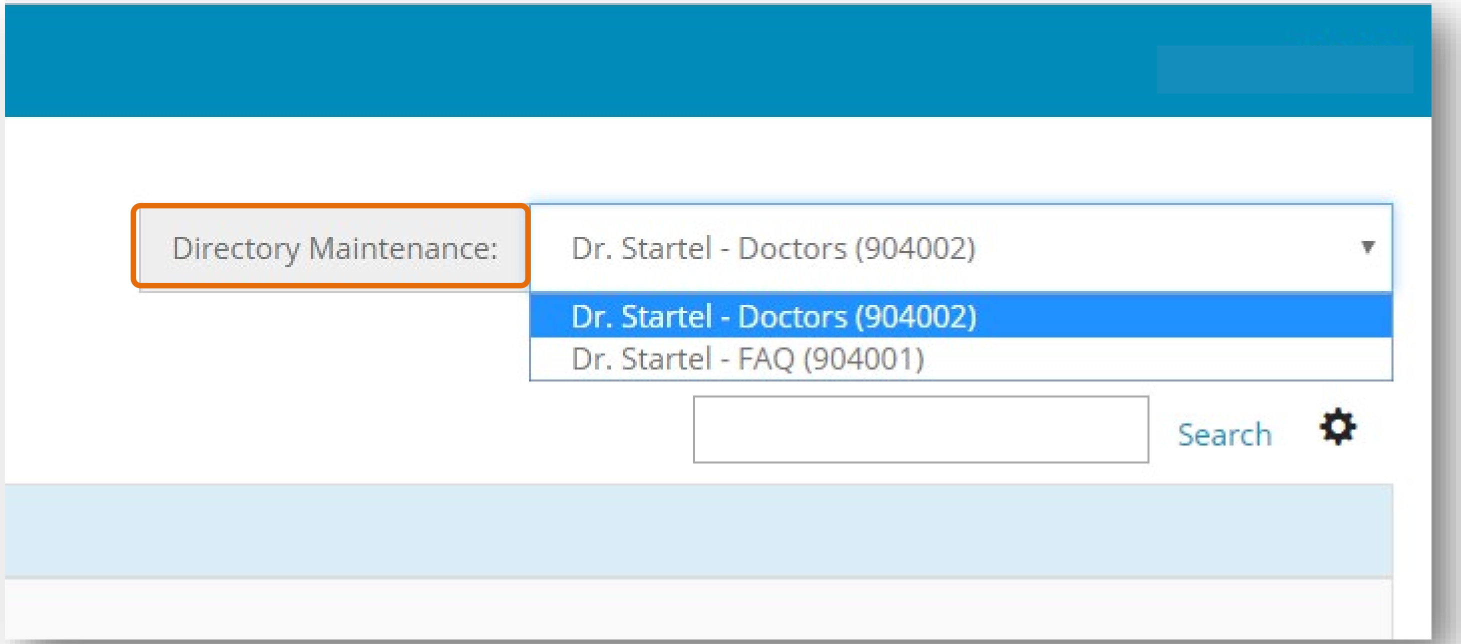
Directories

To switch between multiple directories, click the arrow on the “Directory of Maintenance” menu box on the right side of the screen.

Selecting a directory can allow you to export, add and delete specific rows of information.

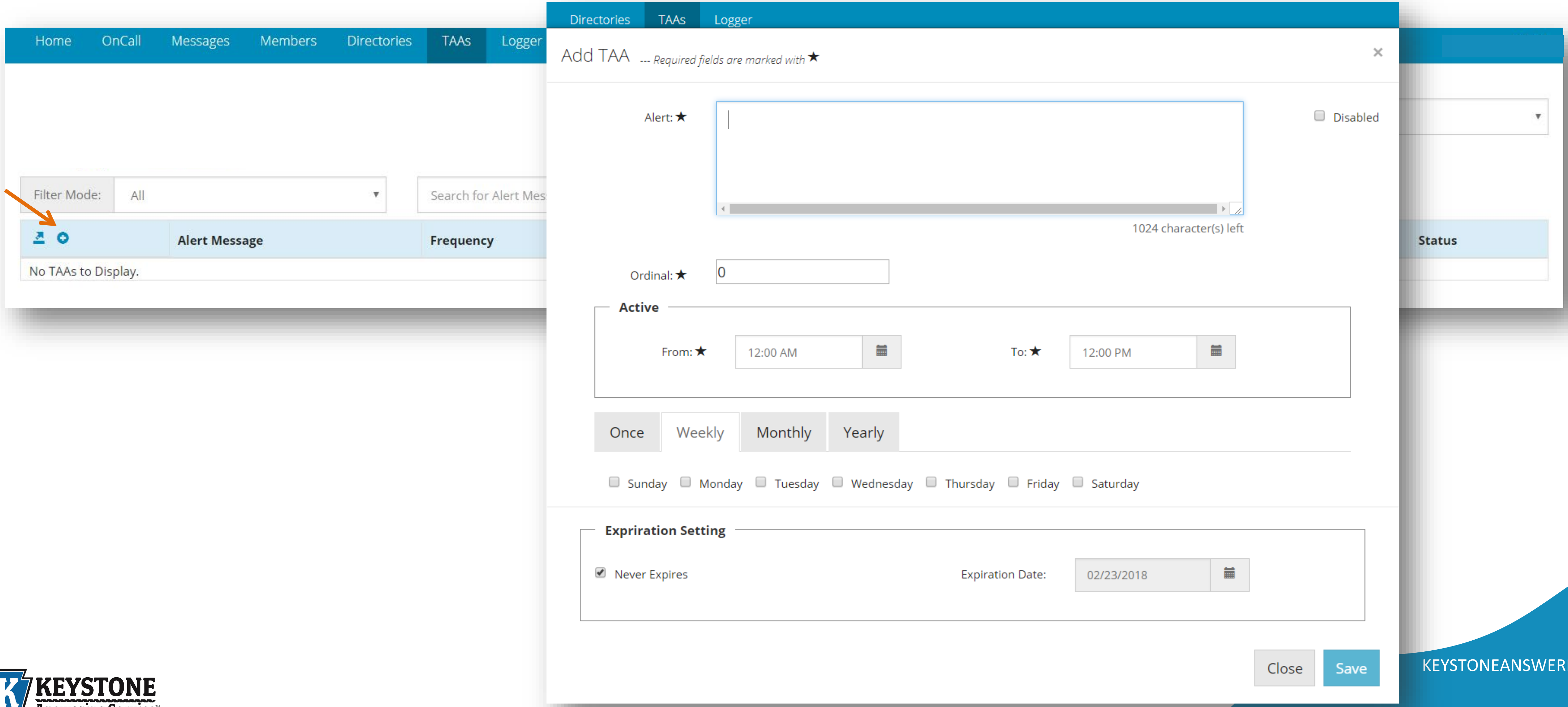


TAAs

To insert notes in your account, you will use the “TAAs” section in the Web Portal. These messages can be special information such as *“Will be closed for Labor Day and will reopen September 5th”* or scheduling notes such as *‘Schedule is full for today – no more same day appointments’.* To add a new TAA:

•Click on the plus sign on the toolbar.

•Complete the required information in the popup box. **Helpful hint: Make sure to adjust the time!**



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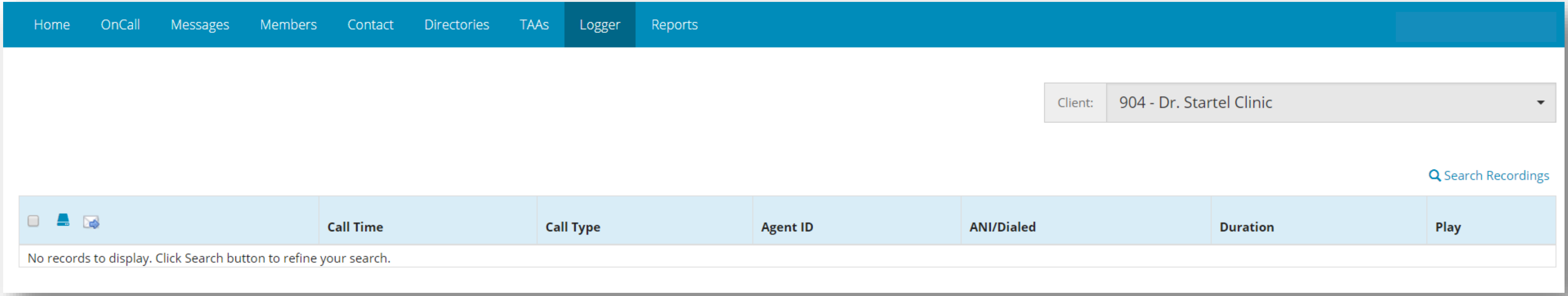
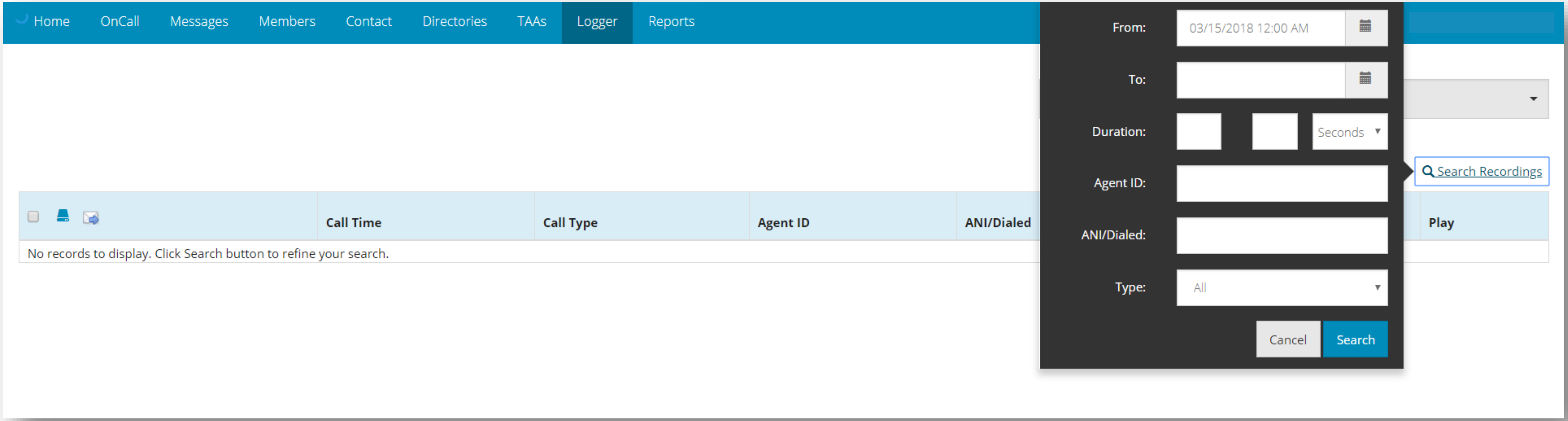
Logger

In the Web Portal “Logger” you have the ability to go back and listen to your business’s calls. The calls can be sorted based on categories such as day, time and agent. If you need to keep a specific call, it can be downloaded onto your device or sent in an email straight from the Logger.



Logger

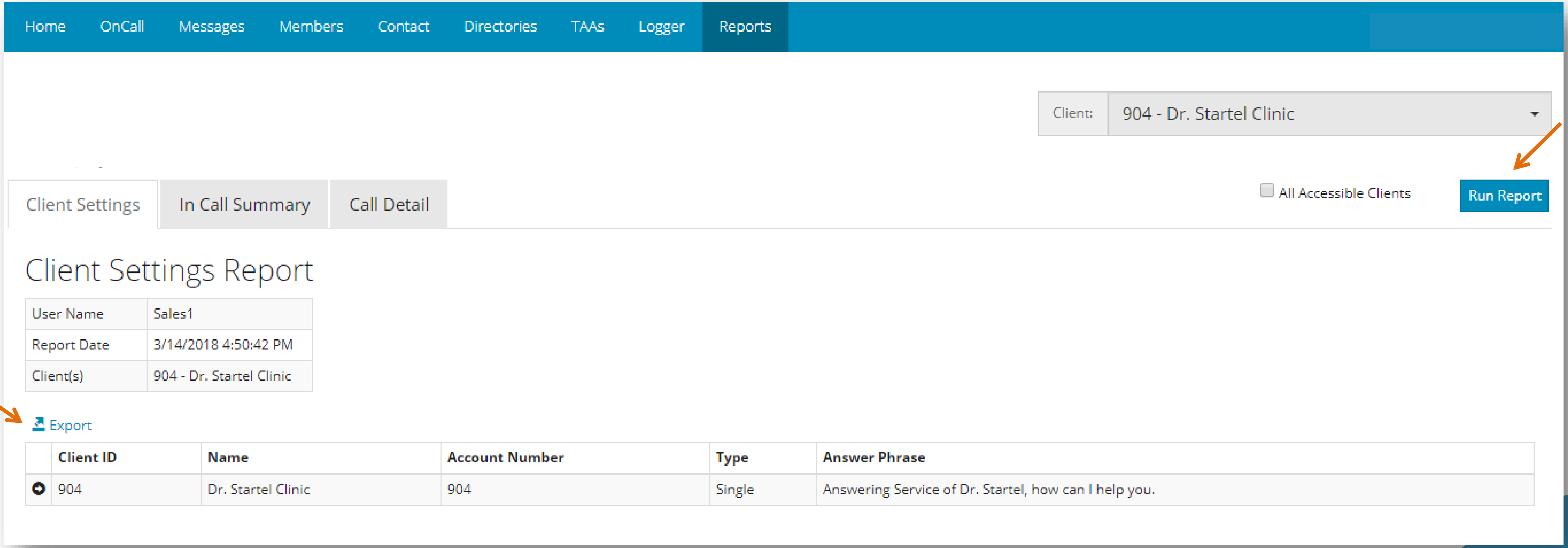
To search your call database, click the “Search Recordings” option on the right side. Options that you can search include: Date To and From, Duration of the Call, Agent ID and Type of Call.



Reports

The Client Settings Report allows you to view/export all of your account information.

- If you have access to more than one client, checking the ‘All Accessible Clients’ option will allow you to run the report for all the clients.
- Then, click the blue ‘Run Report’ button to view/export the client data.
    - To export the information, click the ‘Export’ button above the Client ID.



Reports

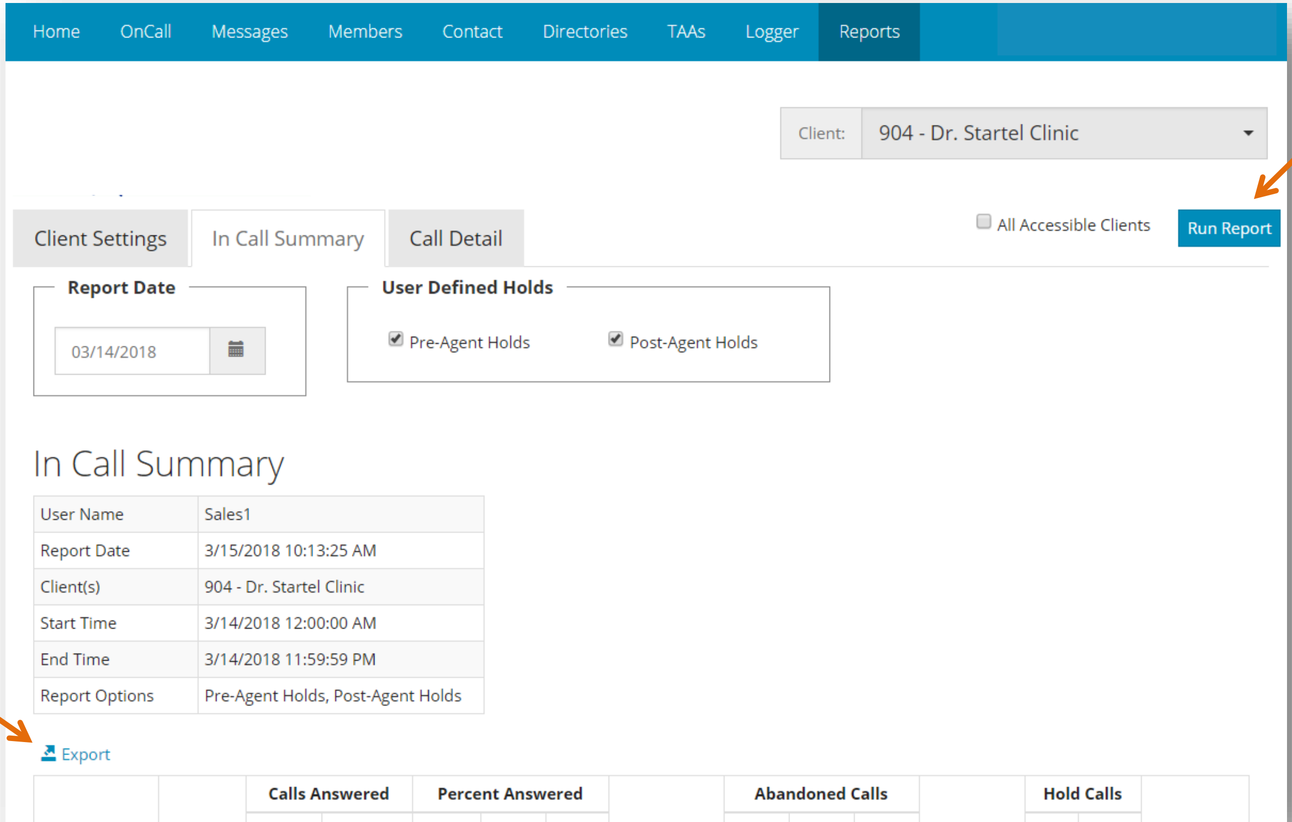
The In-Call Day Summary Report allows you to view and export call traffic in 30 minute increments.

•If you have access to more than one client, checking the 'All Accessible Clients' option will allow you to run the report for all the clients.

•Choose the date you like to review and the types of 'Holds' you want to include.

•Then, click the blue 'Run Report' button to view and export the client data.

•To export the information, click the 'Export' button above the report table.



Reports

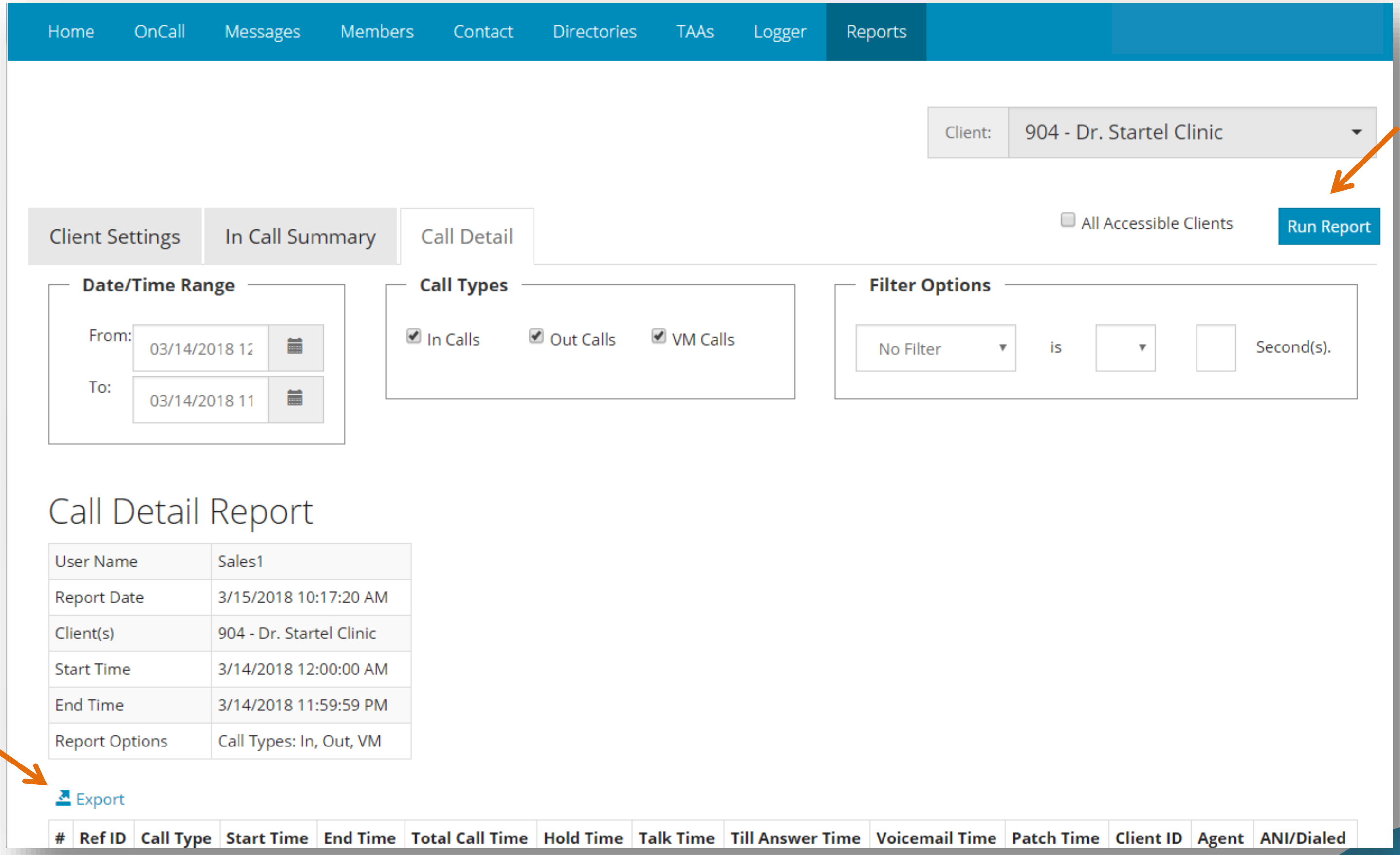
The Call Detail Report will list all calls for the selected account(s) based on a specific timeframe and filter parameters.

•If you have access to more than one client, checking the ‘All Accessible Clients’ option will allow you to run the report for all the clients.

•Choose the date range, call types and filter options desired.

•Then, click the blue ‘Run Report’ button to view and export the client data.

•To export the information, click the ‘Export’ button above the report table.



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Logger Privacy Policy

This Policy sets forth how the owners and operators of www.keystoneansweringservice.com ("we" or "us"), collect and use the information provided to us from our website users, including our prospective or current business customers (through any individual authorized employee or representative of such customers) and certain other information that we automatically collect from all users through access and use of www.keystoneansweringservice.com ("Website"), or through any communications with us by any such parties (collectively referred to as “You” hereinafter). **YOU ACKNOWLEDGE AND AGREE THAT BY USING ANY PORTION OF THIS WEBSITE OR ANY SERVICES OFFERED ON THIS WEBSITE, SUCH USE SHALL INDICATE THAT YOU HAVE READ, UNDERSTAND AND THAT YOU AGREE TO OUR COLLECTION AND USE OF THE INFORMATION PROVIDED BY YOU OR AUTOMATICALLY COLLECTED BY US, AS SET FORTH IN THIS POLICY.**

Illegal or Abusive Usage is Strictly Prohibited: You may not abuse, threaten or impersonate others with the use of information from our audio recordings. You may not use the Website and/or its client data for any illegal or unauthorized purpose. International users must agree to comply with all local laws regarding online conduct and acceptable content. Should you be found to have engaged in illegal or abusive usage of client information, Keystone Answering Service will suspend your account or usage as applicable, and investigate into further legal actions.

If you have any general questions or concerns about this Policy, you may contact us by sending an email with your questions, comments or concerns to contact@keytas.com.