ELITE OFFICE SUITE

Call Center User & Administrator Manual

Twilio setup, routing, queues, extensions, agents and browser calling

Current Build - September 28, 2026

Prepared from the current Elite application source package. Interface visibility varies by assigned abilities and enabled modules.

Contents

This contents list follows the manual in reading order.

Quick Start Administrator setup sequence
1 Access and Permission Model
2 Twilio Connection Settings
3 Departments
4 Call Agents
5 Queues
6 Announcements
7 Phone Menus and IVR
8 Extensions
9 Browser Phone
10 Call Directory
11 Agent Console
12 Calls & Voicemail
13 Recording, Voicemail and After-Hours Behavior
14 Current Routing Behavior
15 Troubleshooting
Appendix Field and status reference

About This Manual

This manual describes the current Elite Call Center implementation in the supplied September 28, 2026 source package. It is written for both administrators and agents. The same core Call Center can be used inside Elite Office Suite; standalone packaging may present the same functions under a different entry point.

Two access levels

Inside Elite, calls.use exposes day-to-day phone/call tools. calls.manage exposes administration such as Departments & Queues, Phone Menus, Announcements and Extensions.

Quick Start

Use this order for a clean first-time configuration.

1. Configure the Twilio connection and save settings.
2. Set the Twilio phone number's inbound voice webhook to the Inbound Voice Webhook URL shown by Elite.
3. Select Test Twilio Connection and confirm the status becomes connected.
4. Create Departments that reflect the business structure.
5. Add Call Agents from active staff members.
6. Create Queues, choose a ring strategy and max wait time, then assign agents to each queue.
7. Create Announcements for spoken greetings or prompts.
8. Create Extensions for staff and choose Browser Phone, External Phone or Browser + External behavior.
9. Create a Phone Menu, choose its greeting and make it default if it should answer the main number.
10. Add menu options that route digits to queues, extensions, announcements, another menu, voicemail, repeat menu or hang up.
11. Have agents open Agent Console, set Availability to Available and verify their queue assignments.
12. Have browser-phone users open Phone and select Enable Phone before taking or placing calls.

1. Access and Permission Model

Call Center functions are scoped to the active organization and are separated between normal call use and call administration.

Ability	Current navigation
calls.use	Phone; Calls & Voicemail; Call Directory
calls.manage	Departments & Queues; Phone Menus; Announcements; Extensions

A Call Center entitlement must also be active for the organization. The current Call Center landing page reports the organization name and that the entitlement is active.

2. Twilio Connection Settings

Call Center Settings stores the organization's Twilio connection and basic call behavior.

Field	Current validation / purpose
Account SID	Twilio Account SID; format AC followed by 32 hexadecimal characters.
Auth Token	Secret token. If a token is already stored, leaving the field blank keeps the existing secret.
API Key SID	Optional key SID; format SK followed by 32 hexadecimal characters.
API Key Secret	Optional secret. Blank keeps an existing stored secret.
TwiML Application SID	Optional application SID; format AP followed by 32 hexadecimal characters.
Twilio Phone Number	E.164-style number beginning with + and country code.
Enable call recording	Turns call recording behavior on/off for the organization.
Enable voicemail	Turns voicemail behavior on/off; new settings default voicemail on in the UI.
After-hours destination	Optional text destination used by call behavior logic.
Inbound Voice Webhook	Elite displays the exact organization-specific webhook URL to configure on the Twilio phone number.

Configure and test

13. Open Call Center Settings.
14. Enter Account SID, Auth Token and Twilio Phone Number. These three fields are what the current controller uses to determine whether the configuration is complete.
15. Add API Key SID / Secret and TwiML Application SID if your deployment uses them.
16. Choose recording and voicemail behavior and enter an after-hours destination if required.
17. Select Save Call Center Settings.
18. Copy the displayed Inbound Voice Webhook into the Twilio phone number's incoming voice webhook configuration.
19. Return to Elite and select Test Twilio Connection.
20. Confirm the connection status reports connected. If the test fails, recheck credentials and try again.

Secrets

The settings form is designed so blank Auth Token or API Key Secret fields keep the stored secret rather than clearing it.

3. Departments

Departments group queues by business function.

Create a department

21. Open Departments & Queues.
22. Under Departments, enter Department name.
23. Optionally enter Description.
24. Select Add Department.

Department names are limited to 100 characters; descriptions to 1,000 characters in the current controller.

4. Call Agents

A Call Agent is an active staff member who can be assigned to one or more queues and receive queued calls.

Add a call agent

25. Open Departments & Queues.
26. Under Call Agents, select an eligible staff member.
27. Select Add Call Agent.
28. Confirm the agent appears in the list. Newly added agents are created active and allowed to receive calls in the current implementation.

Agent readiness

Being a Call Agent is not enough to pick up queued calls. For browser queue pickup, the current code also requires an active browser-phone extension, an Available presence status, and assignment to the target queue.

5. Queues

Queues hold callers until an eligible agent receives the call.

Setting	Current choices / limits
Queue name	Required; up to 100 characters. Queue names must be unique within the organization after slugging.
Department	Optional; must belong to the organization.
Ring strategy	Round robin; Ring all available agents (simultaneous).
Max wait	Required; 30 to 3,600 seconds.
Agents	One or more Call Agents can be assigned with Save Queue Agents.

Create and staff a queue

29. Open Departments & Queues.
30. Enter Queue name.
31. Optionally choose Department.
32. Choose Round robin or Ring all available agents.
33. Enter Max wait seconds.
34. Select Add Queue.
35. In the queue card, select the agents who should receive that queue.
36. Select Save Queue Agents.

6. Announcements

Announcements are reusable spoken prompts for phone menus and routing.

Create an announcement

37. Open Announcements.
38. Enter Name.
39. Enter Spoken Text.
40. Optionally set Voice and Language.
41. Select Create Announcement.

The current controller allows up to 120 characters for the announcement name and 4,000 characters for spoken text. Voice and language are optional fields.

7. Phone Menus and IVR

Phone Menus define the greeting and keypad routing presented to callers.

Create a phone menu

42. Open Phone Menus.
43. Enter Menu Name.
44. Choose a Greeting announcement or leave No greeting selected.
45. Set Timeout Seconds (1-30).
46. Set Max Attempts (1-10).
47. Select Make this the default phone menu if this menu should be the organization's default menu.
48. Select Create Phone Menu.

Add a menu option

49. Choose the Phone Menu.
50. Choose a Digit: 0-9, * or #.
51. Enter a Label describing the choice.
52. Choose Destination.
53. If the destination requires a target, select the appropriate Queue, Extension, Announcement or another Phone Menu.
54. Select Save Menu Option.

Destination	Behavior represented by current UI
Queue	Send to a configured active queue.

Extension	Send to an active internal extension.
Announcement	Play a configured announcement.
Another Phone Menu	Route to a different active menu; the current validation blocks a menu from routing to itself.
Voicemail	Route to voicemail behavior.
Repeat Menu	Replay/re-enter the current menu flow.
Hang Up	End the call.

Direct extension dialing

In the current inbound controller, the default company menu also accepts a three-digit extension directly in addition to one-digit menu choices. Extensions use the 101-999 range.

8. Extensions

Extensions connect staff members to browser calling, external forwarding, voicemail and the directory.

Field	Current behavior
Extension	Required three-digit-style number from 101 through 999; unique for the organization.
Staff Member	Required and must be an active organization member.
Directory Name	Required display name, up to 120 characters.
Department	Optional active department.
Ring Mode	Browser Phone; External Phone; Browser + External.
Forwarding Number	Optional external target, up to 32 characters in current validation.
Browser Phone	Enable browser endpoint for that extension.
Voicemail	Enable voicemail for that extension.
Directory	Make the extension visible in Call Directory.
Active	Enable/disable the extension.

Create an extension

55. Open Extensions.
56. Enter an unused number between 101 and 999.
57. Select an active Staff Member.
58. Enter Directory Name.
59. Optionally choose Department.
60. Choose Ring Mode.
61. If external ringing is used, enter Forwarding Number.
62. Choose Browser Phone, Voicemail, Directory and Active flags as needed.
63. Select Create Extension.

9. Browser Phone

Phone is the staff browser-phone interface.

- If the account has no active browser-phone extension, the page reports No Browser Phone Assigned.
- Select Enable Phone before receiving browser calls.
- The phone interface provides Call, Answer, Reject, Hang Up and Mute controls.
- Outbound external calls require a valid E.164 phone number and a configured organization caller ID / Twilio phone number.
- Internal browser calls can target an active three-digit extension.

Queue pickup requirements

The current queue-pickup controller verifies the signed-in browser-phone identity, active extension, active Call Agent record, Available presence state and assignment to the selected queue before allowing pickup.

10. Call Directory

Call Directory lists extensions that have Directory enabled and provides a Call action for internal staff dialing.

Directory entries can reflect Browser Phone, Voicemail and External Ring capabilities as configured on the extension.

11. Agent Console

Agent Console gives a Call Agent a focused view of presence, assigned queues and waiting callers.

Availability

Status	Meaning in current UI
Available	Eligible for queued-call pickup when other requirements are met.
Away	Not presented as available for queue pickup.

Offline	Not available for queue pickup.

64. Open Agent Console.
65. Choose Available, Away or Offline.
66. Select Update Status.
67. Review My Queues to confirm assignments.
68. Under Waiting Calls, review Queue, Caller and Waiting Since.
69. Select Answer to open the Phone page for that queued call.

12. Calls & Voicemail

Calls & Voicemail is the operational call-history and follow-up screen.

- Summary counts include Answered, Voicemails and Open items.
- Recent call rows classify activity such as Live, Voicemail, Answered or Missed based on current call state.
- Voicemail rows can expose the recorded voicemail when a recording SID is present.
- Staff can Mark Reviewed, Complete or Reopen call follow-up items.
- Refresh Live Calls reloads current call state.
- The current transfer control offers Sales, Technical Support and Billing as transfer destinations.

Current transfer limitation

The live-transfer UI is presently wired to three named department choices: Sales, Technical Support and Billing. If you configure a different department structure, confirm the transfer UI is updated before documenting other destinations for staff.

13. Recording, Voicemail and After-Hours Behavior

Organization-level settings control whether recording and voicemail are enabled. Extension-level settings also control voicemail availability for an extension.

- Enable call recording is an organization setting.
- Enable voicemail is an organization setting and voicemail can also be enabled per extension.
- The settings page accepts an After-hours destination value.
- Voicemail completion and recording-status webhooks exist in the current routing layer so recorded voicemail can be associated with call activity.

14. Current Routing Behavior

The Call Center combines organization settings, default menu selection, menu options, extensions, queues and agent state.

70. An inbound call reaches the organization-specific Twilio inbound webhook.
71. The current routing layer can render the default active phone menu.
72. On the default menu, a caller may enter a single configured menu digit or a three-digit extension.
73. Menu options can route to queues, extensions, announcements, another menu, voicemail, repeat or hang up.

74. A queue holds the caller until an eligible agent can receive/pick up the call or queue handling reaches its configured wait behavior.
75. Browser Phone can place internal extension calls and external PSTN calls when configured.

15. Troubleshooting

Use this table for the most likely current-build causes.

Symptom	Check
Connection status is not_configured	Account SID, Auth Token and Twilio Phone Number must all be present.
Test Twilio Connection fails	Recheck Twilio credentials; save first, then test again.
Inbound calls do not reach Elite	Confirm Twilio phone number incoming voice webhook exactly matches the Inbound Voice Webhook shown in Call Center Settings.
Agent cannot see/answer queued calls	Confirm agent record, queue assignment, Available status and active browser-phone extension.
No Browser Phone Assigned	Create/activate an extension for that user with Browser Phone enabled.
Internal extension unavailable	Confirm extension is active and Browser Phone is enabled for internal browser dialing.
Queue creation rejected	Use a unique name, valid department, supported ring strategy and max wait from 30-3600 seconds.
Menu option rejected	Confirm the selected target is active and belongs to the same organization; another-menu routing cannot point to the same menu.
External call rejected	Use a valid +country-code E.164 destination and confirm the organization Twilio phone number is configured.
Transfer choices do not match configured departments	Current Staff Calls transfer control is fixed to Sales, Technical Support and Billing in this source build.

Appendix A - Administrator Field Reference

Area	Important current limits
Department	Name 100 chars; description 1,000 chars
Queue	Name 100 chars; max wait 30-3,600 sec; round_robin or simultaneous
Announcement	Name 120 chars; spoken text 4,000 chars

Phone Menu	Timeout 1-30 sec; attempts 1-10; digits 0-9, * or #
Extension	101-999; directory name 120 chars; forwarding text 32 chars
Agent presence	available; away; offline
Twilio phone	E.164 format beginning with +

Appendix B - Deployment Checklist

- Twilio credentials saved and connection tested.
- Inbound voice webhook configured at Twilio.
- Recording/voicemail policy choices set.
- Departments created.
- Agents added.
- Queues created and agents assigned.
- Announcements created.
- Extensions assigned and tested.
- Default phone menu created.
- IVR options routed and tested.
- Agents trained to set presence.
- Browser Phone tested for internal and external calls.
- Voicemail and call follow-up tested.
- Transfer destinations verified against the current three-choice transfer UI.