

## Getting Started with Active Insights

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The Active Insights platform provides web-based access to recordings, messages, call service statistics, auto-generated call transcripts, and post call scores for Intelligent Series. All data is still retained within your IS Database, but with Active Insights, you have new tools and Dashboards at your disposal. The Active Insights SaaS resides in an AWS cloud environment managed by Amtelco. Please reach out to your Amtelco Salesperson for licensing.

### Setting Up Active Insights

Customer-provided items:

1. For the Active Insights platform to communicate with your IS Server, Transmission Control Protocol (TCP) port 50052 must be open. If this is not open, Active Insights will be unable to receive data from your IS server.
2. Amtelco Field Service will need access to your IS Application server to configure the new Active Insights connection.

Note: in some cases, an IS restart will be required. This would include a brief downtime event for your IS system.

3. Amtelco Field Service will need a list of email addresses for resources who need access to the Active Insights platform. These resources will have full access to your Active Insights system.

From	To	Protocol	Port	Network Security Protocol	Reason
Web Browser	Active Insights	TCP	443	TLS 1.2	Web Portal Administration
IS/Application Server	Active Insights	TCP	443	TLS 1.2	REST interface for access tokens, etc.
IS/Application Server	Active Insights	TCP	443	TLS 1.2	AWS S3 for sending/receiving recordings
IS/Application Server	Active Insights	TCP	50052	TLS 1.2	gRPC interface to receive IS event data.

## Accessing Active Insights

The Active Insights platform can be accessed through an Amtelco approved/tested browser; this currently includes Google Chrome and Microsoft Edge.

To first establish your Active Insights Credentials:

1. Amtelco Field Service will initiate the registration request via email to each address provided. You should consider your spam folder if emails are not received. Emails will be coming from “noreply@amtelcoservices.com”.
2. The first email will contain a link to begin your account registration.
  - a. Enter your Active Insights Account ID (provided by Amtelco)
  - b. Enter your Active Insights Credentials (provided in the first email)
  - c. Click "Register". By clicking Register, a second email will be initiated containing steps to complete the registration process.
3. After confirming from the second email, your account will be enabled, and you will be directed to the Active Insights login page.

Note: The registration process will need to be completed within 24-hours from the first email initiated. Please reach out to Amtelco Field Service with questions or concerns.

Once your account has been enabled, you will need the Active Insights URL, Account ID and your Active Insights Credentials to log in.

Active Insights URL: <https://amtelcoservices.com/>

## Minimum Software Specs

IS 5.5: Server 5.5.9117.15769 (or above) with Genesis 6.6.9

IS 5.6: Server 5.6.9146.18368 (or above)

IS 5.7+: All server versions

Active Insights License

Optional: Active Insights Transcription

Optional: Ellie

## Active Insights Resources

Documentation:

<https://support.amtelco.com/ai-powered-home>

Tutorial Videos:

<https://support.amtelco.com/video-library/tutorial-videos-home>

Features and Release Notes:

<https://support.amtelco.com/system/files/IS/KnowledgeBase/WhitePapers/AI03FeaturesBenefits.pdf>

[https://support.amtelco.com/system/files/CurrentVersions/AI\\_Powered/Active\\_Insights/Release\\_Notes.pdf](https://support.amtelco.com/system/files/CurrentVersions/AI_Powered/Active_Insights/Release_Notes.pdf)