

# **Quick Start Guide**

Version 1.8.2.

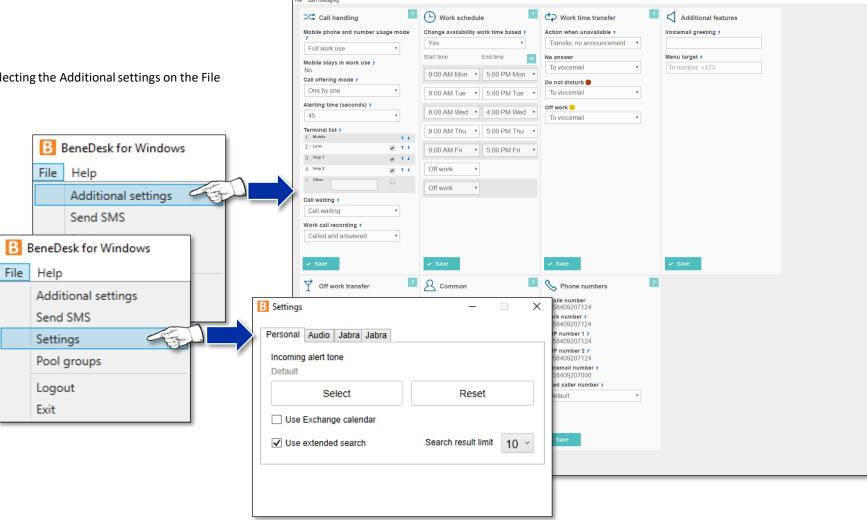
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# Configurations

Start using the *BeneDesk for Windows* by selecting the Additional settings on the File menu. On the **File** menu, you can find:

- Additional settings
- Sending SMS
- Settings
- Service pool groups
- Logout
- Exit

If you want to login as another user, select **Logout** and when you want to close the program, select **Exit**.



- 0

B Additional settings

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## Additional settings

On the Additional settings page, you can see all general setting for your program. The same settings can be found also on the *BeneDesk for Windows* **Settings** page.

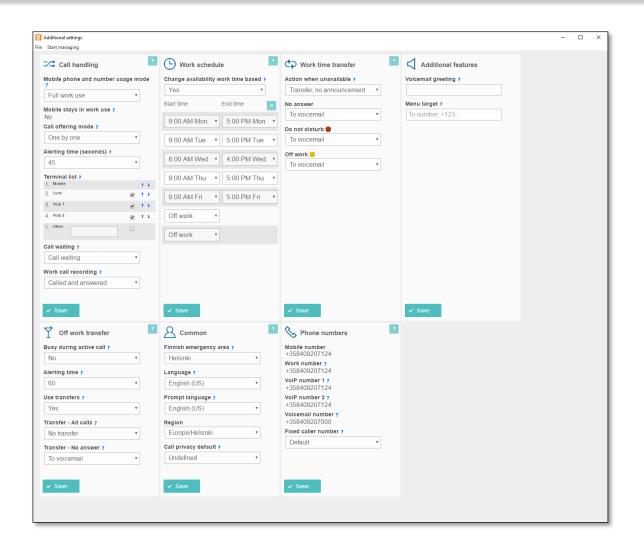
Your user priviledges and purchased products terminate, which services you can use. The **Additional settings** menus include the following:

- Call handling
- Works schedule
- Work time transfer
- Additional features (when using also voicemail)
- Off work transfer
- Common
- Phone numbers

#### Note!

When you have done changes in one section, click the **Save** button in that section.

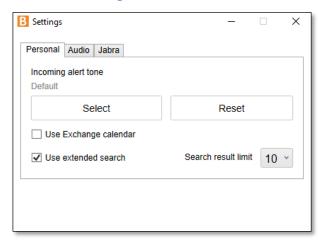
For example, if you wish to change the Call handling and the Work schedule sections, change first the Call handling settings, save the changes and change the Work schedule after that. The **Save** button must be click on both sections.



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## Settings

#### **Personal settings**



On the **Settings**, it is possible to see and change the following program settings:

- Personal settings
- Audio Settings
- · Directory search settings

On the Personal settings tab, you can select a ringing tone for incoming calls or return the default tone. On this tab it is also possible to set the Outlook Exchange calendar into use.

If you wish change the ringing tone, click the **Select** button and a window opens, where you can search and select a new tone. Notice, that the selected tone must be in the .wav format, other formats are not supported. If you wish return the default tone, click the **Reset** button.

#### **Directory search settings**

You can use the extended search for searching contact information inside the company. Directory's search settings are done by selecting the **Use extended search** checkbox on the Personal settings tab.

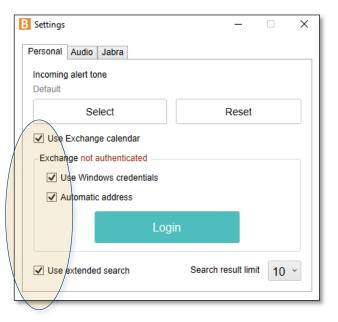
Note! For example, when searching name "John", the search returns also Tim's contact information, because John is marked as Tim's substitute in the contact information. It is possible to limit the search result to show 5, 10, 25, or 50 results.

#### **Using the Outlook Exchange calendar**

- Select the Use Exchange calendar checkbox
- When you are using also the same email address for Windows login, select the Use Windows credentials checkbox
  - In other cases, type in the username and password of the email address you are using

After this, you'll see your organization's calendar and availability information as in the picture below.





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## Audio settings

On the Audio tab, you can adjust your software's audio features, like volume levels. The audio settings tab is divided in three sections:

- Speakers
- Microphone
- Other audio settings

#### **Speakers and Microphone**

- You can choose the devices, which you want to use as speakers and a microphone and, where the alert is ringing
- The selected device can be set as default by ticking the **Use selected device** as **default** checkbox

#### Volume

• The volume can be adjusted by the **Volume** slides

#### Other voice behaviour options

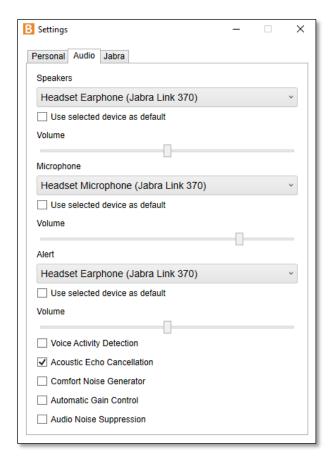
- Voice Activity Detection (VAD): is used to recognize a human voice from the calls
- Acoustic Echo Cancellation:

Echo suppression and echo cancellation are methods in telephony to improve voice quality by preventing echo from being created or removing it if it happens

• Comfort Noise Generator:

is synthetic background noise used in radio and wireless communications to fill the artificial silence

- Automatic Gain Control:
  - automatic volume level control
- Audio noise Suppression: removes noise from the signal



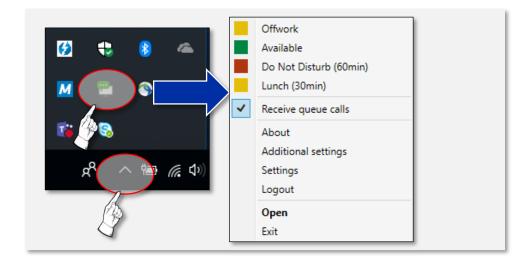
## Shortcuts to BeneDesk for Windows navigation

The **BDfW** icon on the *Windows Taskbar* is a white square with a colored speech bubble on it. The speech bubble's color tells your availability status, as follows:

- **Green** = Available
- **Red** = Don't distrurb
- Yellow = Not available (off work/lunch)

The colors correspond your availability status. Clicking the **BDfW** icon, opens a menu, which can be used to open the **Settings** and **Additional settings**, where it is simple to change your availability and manage the service pool availability information.

When moving the mouse on the icon, you can see a tool tip showing your **current availability status**, **schedule** and **additional information**.



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# Functionality, general

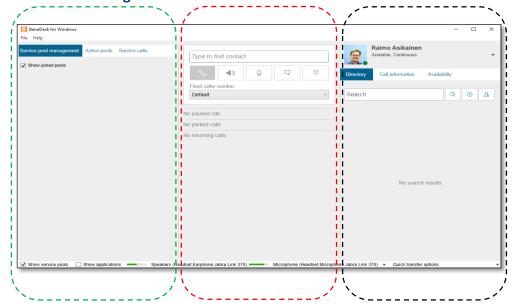
Your user priviledges and purchased products terminate, which services you can use. This quick start guide covers the following functionalities:

- · Functionalities in general
- Sofphone
- · Personal call information
- Call handling

The BeneDesk for Windows softphone is a software that allows you to use your computer for calling and receiving phone calls. The BDfW can also be integrated with the Skype for Business and/or Teams, which makes it possible to use the Skype/Teams phone directory. The software includes menus, which help you to see what is happening in the service pools (depending on the user rights).

To make changes to the service pool(s) on the **Service pool management** tab, you need the *Group manager tools* or *Supervisor tools license*. As a user with the Call service channel user interface license, you can view the service pools(s), but not make any changes.

#### **User interface organization**



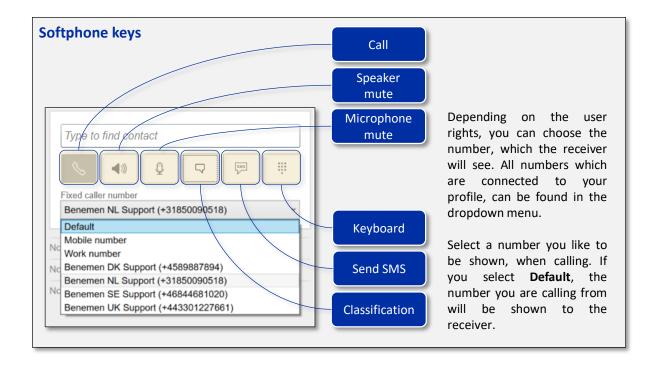
The BeneDesk for Windows user interface is divided in three areas:

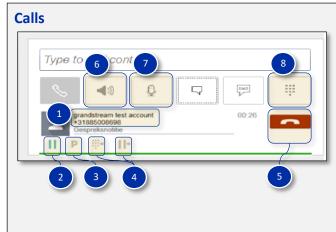
- Service pools (left)
- Softphone (middle)
- Personal call history (directory, call information, availability), (right)

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# Softphone

In the user interface's middle part, is a softphone, which you can use for handling phone calls. You can call by typing a number in the number field or search a number by name.





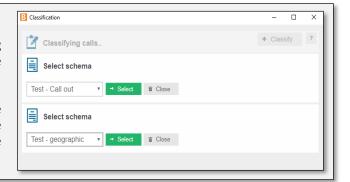
- (1) **Receiver's name** and number (there can be several options in the field)
- (2) **Hold** button is below the receiver icon
- (3) **Park** the call button (requires the switchboard license)
- (4) **Redirecting** buttons
- (5) **Call ending** button = red phone icon (the icon is green when calling and talking an incoming call)
- (6) Speaker setting (on/off)
- (7) Microphone setting (on/off)
- (8) Virtual keyboard

More information about switchboard usage can be found in the *Call handling* chapter.

#### **Call classification**

Call classification can be done by clicking the **Classification** button and filling the classification information.

Fill in the classification information with the appropriate buttons. You can write comments in the **Comment** field. Click the **Save** button to save the changes.

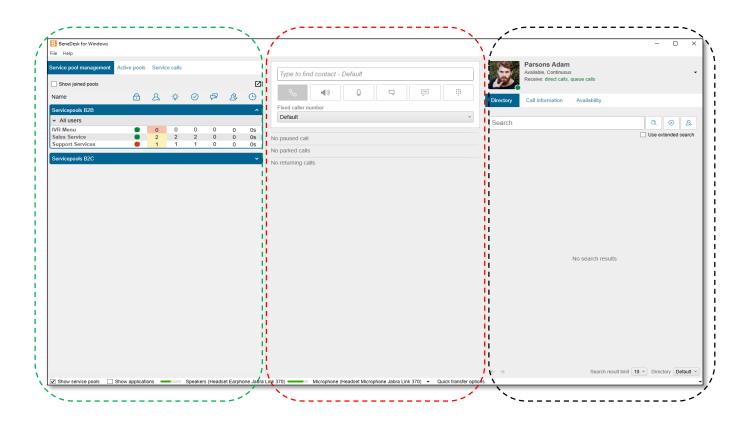


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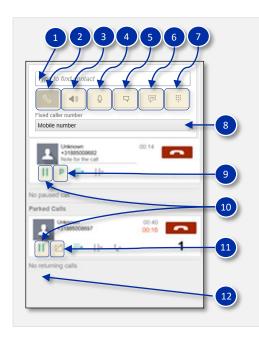
## Call handling and switchboard functions, 1

The switchboard functions can be found in the **middle part** of the *BeneDesk for Windows* user interface.

The company directory is on the **right hand side column**, where you can find the personnel's contact information. It is also possible to check an individual's availability status and Outlook Exchange calendar's information.



## Call handling and switchboard functions, 2



- 1. Search field: The switchboard user can search contact information from the search field by name or number
- 2. Call button: Type a name or number to the search field and press the Call button for callling
- 3. Speaker mute
- 4. Microphone mute
- 5. Classification: A call can be classified here. Click the bubble icon and fill in the classification data
- 6. Sending SMS: The user can choose from the dropdown menu, which sender number is shown to the recipient
- 7. Virtual keyboard: You can use the inbuilt keyboard by clicking the icon. Notice, that the functions, which are not in use are greyd. For example, the Call button becomes green when you first fill the number in the Search field.
- 8. Your number: Select a number you like to show, when calling. If you select the **Default**, the number you are calling from will be shown to the receiver.
- 9. Hold button and calls on hold: To put a call to hold, use the Hold button. You can see all the calls on hold in this section.
- 10. Take back button: Use the Take back button to return a call from park to you
- 11. Park call button
- 12. Returning calls: You can see the returning calls in this section

#### Call parking

When there are several incoming calls at the same time, it is possible to park calls, by using the **Park a call** button (10). If the parked calls are not answered they will return to you. You can park several calls at the same time. There are four park functions, as follows:

- Hold
- Take-back
- Transfer (on the next page)
- Hang up

#### Hold

A call can be put to hold with **Hold** button (8). When the call is on hold, the caller will hear music until the user clicks the **Take back** button (9) and the call will continue. In the standard settings, one call at the time can be put in hold.

## Returning a call

When the switchboard user has transferred a call to a number, which is not answering, the call returns to the switchboard. The call is shown as a returned call and the switchboard user knows how to handle it.

## Call transfers (switchboard)

The switchboard user's tools can be found also in the middle part of the *BeneDesk for Windows* user interface. It is possible to handle the call transfers with three methods:

- Transfer with the keyboard
- Transfer with the directory
- Transfer after a consultation call

## **Transfer with the directory**

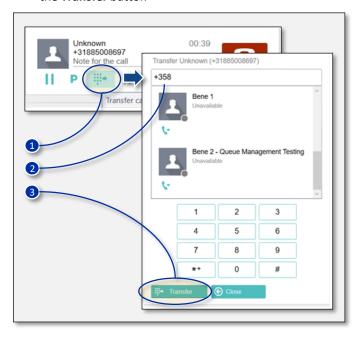


Search the receiver from the directory and click the person's phone or mobile phone icon (marked red on the image).

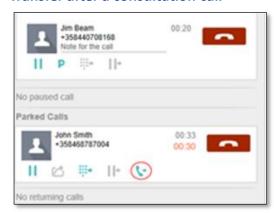
#### Transfer with the keyboard

Transferring a call with the keyboard divides in three phases.

- 1. Press the **Keyboard** button
- 2. A window will open, where you can type the number or search the person by name in the **Search** field
- 3. When you have the name or number ready, press the **Transfer** button



#### Transfer after a consultation call



The caller will be put on hold and the swithboard operator makes a consultation call to the receiver.

After the consultation call, the caller will be transferred to the receiver.

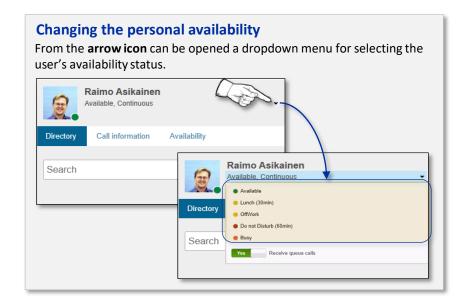
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# The switchboard function keys

Кеу	Function
F1-F2	Call from the directory to a person  F1 call to mobile number  F2 call to another number (usually a fixed line)
F3	Transfer. Opens the virtual keyboard, which you can use to enter the number.
F4	Answers to an incoming call.
F5	Rejects an incoming call or closes an active call. Not effective to calls in hold or park.
F6	Transfers a call from park to hold.
F7	Transfers a selected call from hold or park to an active call.
F8-F9	Transfers a call to a person selected from the directory  F8 transfers a call to a mobile number  F9 transfers a call to another number  If the number is not available, the user will get an error message to the right hand lower corner of the screen (you can try the transfer again after the message). Before transferring, be sure that you have selected a person from the directory.
F11	Sends an SMS. Select a person from the directory and press F11, which opens a message dialog, where you can write your message. You can also check the reciever's name and number on the dialog. Send you message by clicking the Submit button. The user can select, which sender number is shown to the recipient.
F12	Ends the selected call. This button works only when you have chosen a call by clicking it with the mouse and only one call at the time. Select first the call and press F12.
Insert	Moves the cursor to the search field. The Insert button moves the cursor to the search field to make the operation smooth and fast. The button works, when you have the directory tab open in the BDfW personal section.
Delete	Clears the search field. The Delete button clears the field immediately and removes all the search results.
End	Active call to hold. The End button puts the active call to hold.
Home	Returns a call from park or hold. The Home button activates calls selected with the mouse from hold or park.
Arrow up	Moves the cursor from the search field to the directory. The Arrow up button moves the cursor from the search field to the directory's result list. Scrolls the list down.
Arrow down	Moves the cursor from the result list to the search field. The Arrow down button moves the cursor from the directory's result list to the search field. Scrolls the list up.
Page up	Scrolls up the hold/active/park/returning calls lists.
Page down	Scrolls down the hold/active/park/returning calls lists.

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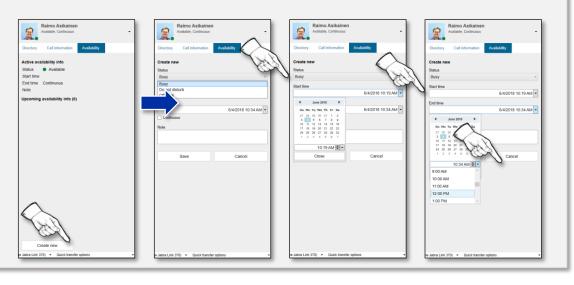
## Personal availability



### **Detailed availability settings**

The set availability status is visible to others in the company's directory and affects the call routing. For example, if a person's status is "Off work", the incoming calls can be re-routed automatically to another number.

The availability can be specified in more detailed level. In a such case, you can make a new availability status with starting and ending times and a notice (not mandatory) to callers.



## Service pools, management and monitoring, 1

- · Management and monitoring, 1
- Changes
- Active pools and service calls

Incoming calls, which are called to the company's service line are handled in service pools. A service pool is a queue, where the callers are waiting for a free resource to answer their call.

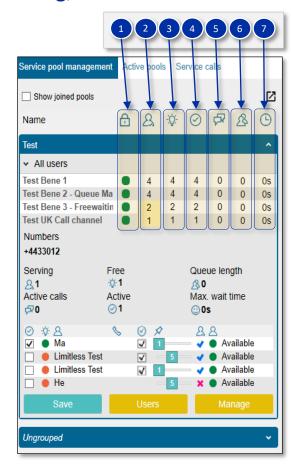
In a service pool, a call is transferred to a right service person according to the persons' skills and availability. A switchboard operator can be a member in all service pools.

#### Note 1

A tool tip will be shown, when you move the mouse on an icon.

#### Note 2

**Show service pools** checkbox in the lower left hand corner opens and closes the service pools view.



You can see the service pool name and availability situation (queue situation)

(1) Incoming calls' statuses and rules:

**Green** = incoming calls are accepted

Yellow = there are call based rules in use

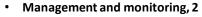
**Red** = incoming calls are not accepted

- (2) The number of free service agents and their statuses:
  - (3) Free
  - (4) Active
  - (5) On an active call
  - (6) How many people are waiting in the queue
  - (7) Maximum waiting time

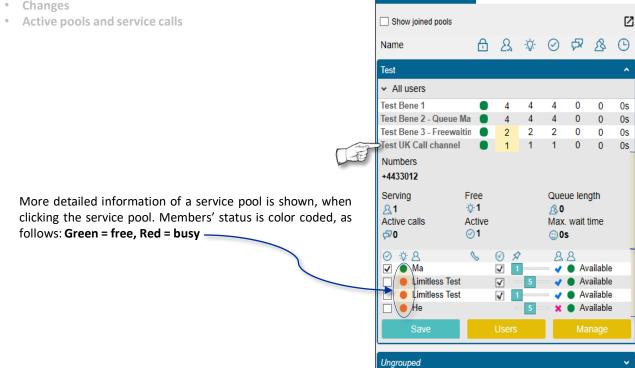
#### Colors in different parts of the bar

- Served
  - Red = no service agents in the service pool
  - Yellow = less than four service persons in the pool
  - Green = four or more service persons in the pool
- · Queue length
  - No color = no callers in the gueue
  - Yellow = one or two people in the queue
  - Red = three or more people in the queue
- Maximum waiting time
  - No color = waiting time less than 30 sec
  - Yellow = waiting time 30 sec or more
  - Red = waiting time one minute or more

## Service pools, management and monitoring, 2



- Changes



Service pool management

Active pools Service calls

In the service pool management, the user can see all pools in which he/she has user rights. The monitor view gives an overall picture of the whole service pool:

- Reserved service agents
- Active service agents
- Calls:
  - Handled
  - Waiting (waiting time)

The user info area shows:

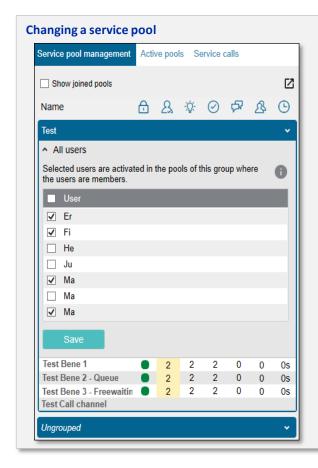
- Ongoing calls are shown as a red phone symbol
- · User status in the service pool
- Active/ not active
  - The status can be changed with the user has correct user rights
- Does the user accept service pool calls
  - Blue = Yes, Pink = No
- The person's availability status

## Service pools, making changes

- Management and monitoring
- Changes
- Active pools and service calls

A *group manager* or a *supervisor* can make changes to the service pools.

- As group manager or a supervisor, you can change the service pool resourcing according to the company's needs
- A switchboard user can be added or removed to/from a service pool according to the situation and company's needs



- Open the wanted service pool by a mouse click
- Click Users
- In the view, which opens, are two columns:
  - User who can be added
  - · Users who are logged in

Name of the service pool is shown on the left top corner. Check that you are changing the correct service pool.

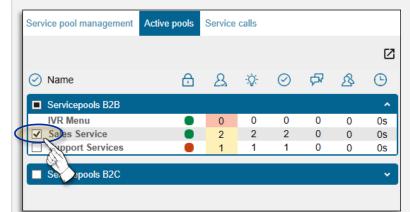
- Adding and removing persons is done by selecting/de-selecting the checkbox on the left side of the person's name
- When making changes, select all customer agents who you will add or remove
- Save the chances by clicking the **Save** button
- The changes must be done by one service pool at the time. Same persons can be members in several service pools.

## Service pools, active pools and service calls

- Management and monitoring
- Changes
- Active pools and service calls

#### **Active service pools**

On the **Active pools** tab, it is possible to control the users' availability information in those service pools, where they are members in. In the picture below, a user can see in which pools he/she is a member and does he/she accept calls from the pool. With the checkbox selection on left, the user can change his/her availability status in the queue.

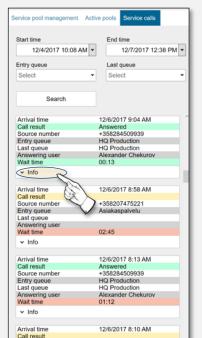


In the picture, can be seen an overall situation of all service pools and pool members.

A switchboard user who is operating in many service pools, can see the pools' situation and receive calls according to the situation.

Changes in settings, will come into effect immediately.

With the Service channel membership license, a user can change his/her availability status in all service pools, where he/she is a member. The queue status can be seen with the Call service channel user interfaces license.



+358503881450

**Service calls** 

Source number

Answering user Wait time

Entry queue Last queue

✓ Info

In the **Service calls** section, you can see all service number calls in the specified time period. With the search function, it is possible to see calls in all search criteria and, in the history, can be seen how much there has been incoming calls.

There is history information from all calls, as follows:

- To which number a customer's call came?
- Was the call answered?
- The number the call was made from?
- To which number the call was transferred?
- Who took the call?
- How long the caller waited before the answer?

More information can be seen, cy clicking the **Info** button.

The list is color coded and the **Call result** and **Waiting time** can be *green, yellow* or *red*.

- **Green =** a good result
- Yellow = an average result (e.g. a longer waiting time)
- **Red** = a bad result (the call was not answered, or the waiting time was too long)

## Service pool groups, general

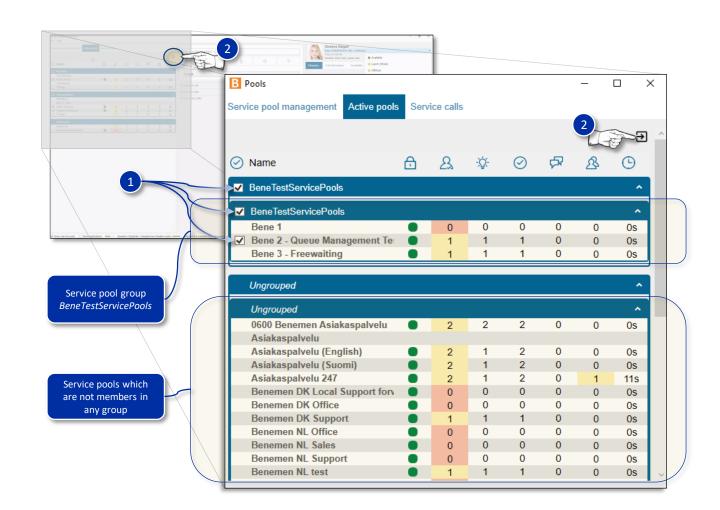
#### General

With the Pool group functionality, the system administrator can group the service pools into logical sets.

- 1. A user **can login as active** in a group, which makes him/her active in all service pools in that service pool group. In same way, it's possible to select the groups the user wants to be active.
- 2. The **service pools** can be opened in a separate window by clicking the arrow icon, when it is possible to change the window size and location

Users' activity is managed by selecting the needed check boxes. This does not manage the user's service pool membership, but only the activity i.e. is the person active or not. The user's activity changes according to selection in all service pools, which are members of the selected service pool group.

If a service pool is a member in several service pool groups and selected as active in one group, is the group active in all service pool groups where the pool is a member.

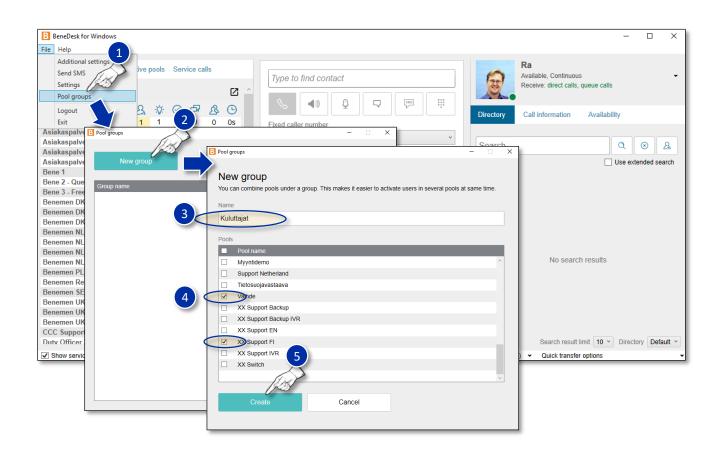


# Service pool groups, grouping

### **Creating service pool groups**

Creating a new service pool group:

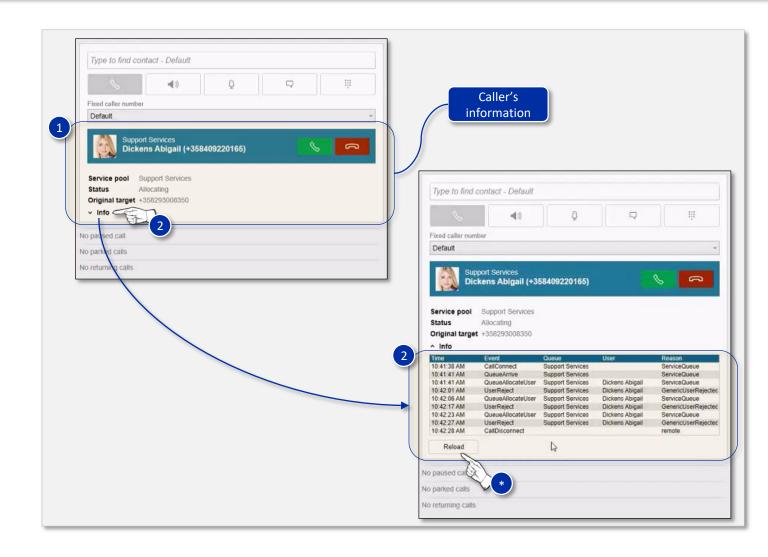
- 1. Open the **Pool groups** window
- 2. Start grouping by clicking the **New group** button
- 3. Give a **name** for the group
- 4. Select the **service pools**
- 5. Click the **Create** button to create the new group
- Service pools can be a member in several groups at the same time
- A group can also be empty, when it is not showed to the users
- Deleting a group removes the group, not the service pools
- The groups can be edited after creating



## Caller's information and detailed call info

#### Caller's information and call info

- 1. The **caller's information** is showed on the softphone:
  - Name
  - Phone number
  - Service pool
  - Call status
- 2. Detailed call info can be seen by clicking the Info button
  - The detailed call information can be opened already before answering the call
  - The list is updated by clicking the **Reload** button \*



# Active service pools, availability status and receive queue calls selection

## **Active service pools**

1 Active service pools from a user receive calls can be seen under the user's information on the *Receive* row.

## **Availability status**

2 From the **arrow icon** can be opened a dropdown menu for selecting the user's availability status.

## **Receive queue calls selection**

With the Receive queue calls slider on the availability status dropdown menu, the user can select to receive service pool calls

