



BeneDesk

Quick Start Guide

Login

You can login to *BeneDesk* portal in the URL:
<https://discover.beneservices.com/>

Normal login

1. Fill your email address to the **Username** field
2. Click the **Search** button
3. Click the **Log in** button (or **Enter** on the keyboard)

When logging in at the first time or if the password is forgotten

1. Fill your email address to the **Username** field
2. Click the **Search** button
3. Click the **Log in** button (or **Enter** on the keyboard)
4. Click the **Forgot password** button and fill:
 - Your email address to the **Username** field
 - Your phone number to the **Phone number** field
 - Click the **Send request** button

If the username is not found

- If the username is not found in the *BeneDesk* system, an error message will be shown
- Check that the username is written correctly and contact the *BeneDesk* administrator if needed

The image shows a sequence of four screenshots illustrating the login process in BeneDesk:

- Step 1:** A browser window showing the URL <https://discover.beneservices.com/> in the address bar.
- Step 2:** The BeneDesk login page. The "Username" field is filled with "ra@benemen.com". The "SEARCH" button is highlighted with a hand icon and a blue circle containing the number 2.
- Step 3:** The login page. The password field is filled with "*****". The "Log in" button is highlighted with a hand icon and a blue circle containing the number 3.
- Step 4:** The "Request a new password" page. The "Username" field is filled with "user.name@company.com". The "Phone number" field is filled with "+35850.". The "Send request" button is highlighted with a hand icon and a blue circle containing the number 4.

A fifth screenshot shows an error message: "Nothing found, please check the username".

Main page

On the web portal main page you can find the following sections:

- Availability
- Settings
- Call information
- Directory
- BeneCC
- BeneReports
- BeneHelpDesk

There is also a quick menu on the left hand side of the main page to give fast and smooth access to all functions.

The screenshot shows the BeneDesk web portal interface. At the top, there is a navigation bar with the BeneDesk logo, a 'Set availability' button, and a user profile for 'rai@benemen.com'. Below this is a grid of seven main sections: Availability, Settings, Call information, Directory, BeneCC, BeneReports, and BeneHelpDesk. Each section has a brief description of its function. On the left side, there is a vertical quick menu with icons for each of these sections. The bottom right corner of the page displays the date and time: '6/28/2018 10:29:27 AM Europe/Helsinki EN © Benemen Oy 2007-2018'.

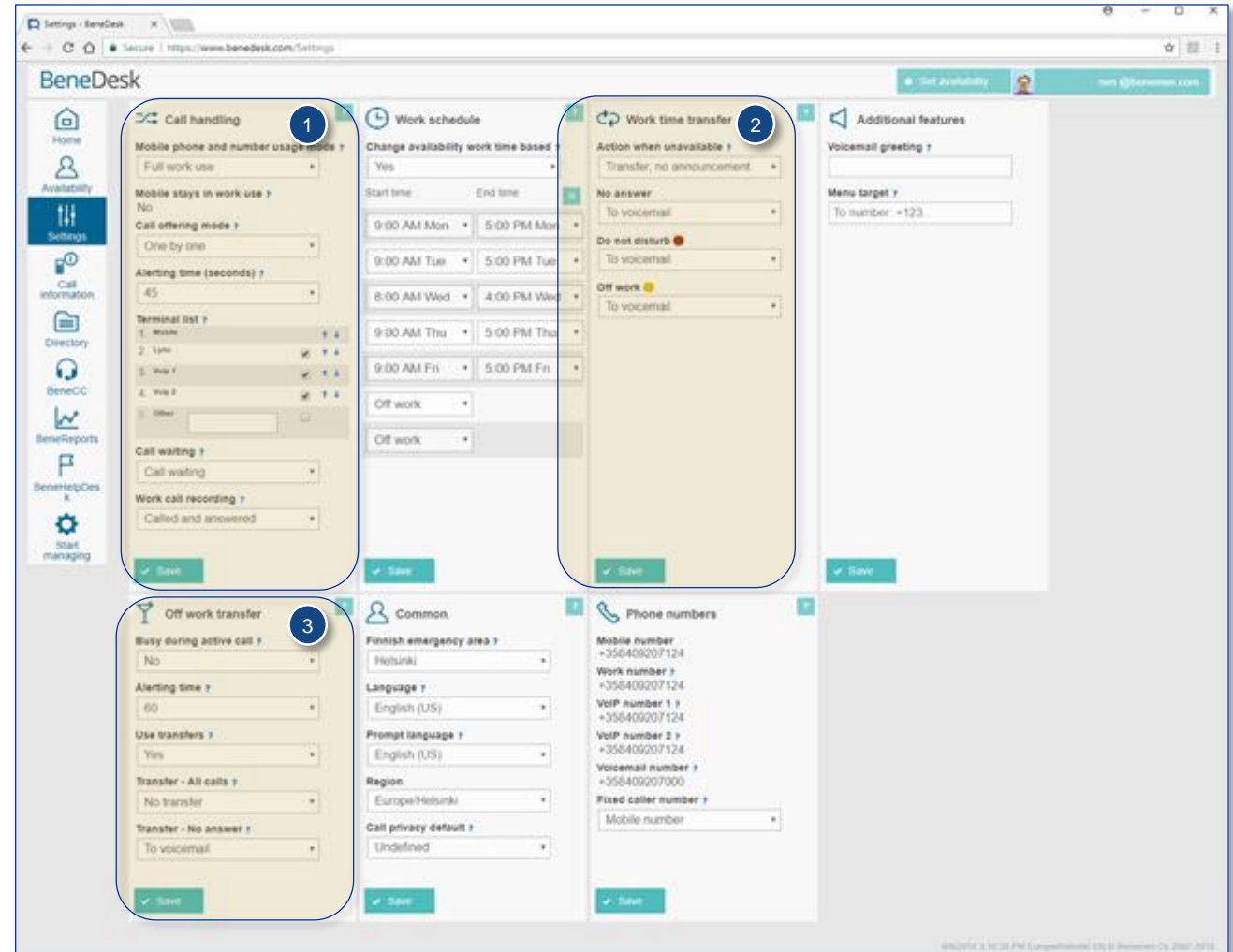
Settings

On the Settings page, you can find:

- **Call handling** 1
- Work schedule
- **Work time transfer** 2
- Additional features
- **Off work transfer** 3
- Common
- Phone numbers

The bolded bullet points will be explained in more detailed level on the following pages.

For example, if you wish to change the Call handling and the Work schedule sections, change first the settings in the Call handling, click the **Save** button and after that change the settings in the Work schedule section.



Work time transfer

In the Work time transfer, you are able to define how the incoming calls will be handled, when you are not available during the working hours.

Announcement and transfer settings

Announcement and transfer

The caller will hear an announcement before the call is transferred.

Transfer, no announcement (on the next page)

You can set the rules for the incoming calls in the **No answer**, **Do not disturb** and **Off work** dropdown menus, as follows:

- No transfer (the call ends and it will not be transferred)
- To voicemail (the caller will be transferred to the voicemail to leave a message)
- To number (add another phone number to where the call will be transferred)

Announcement and transfer

Write an announcement into the **Announcement** field and Benemen's text-to-speech engine will change it to speech.

Click the **Save** button to keep the changes.

Additional features (when using also the voicemail)

- **Voicemail greeting:** you can write a message into the **Voicemail greeting** field for the caller to hear before leaving a message
- **Menu target:** a transfer number for choosing the voicemail (not mandatory to use)
- Click the **Save** button to keep the changes

Hint: You can also record a greeting in the voicemail's answer menu.

Work time transfer

In the Work time transfer section, you can define, how the incoming calls will be handled, when you are not available during work time.

Transfer, no announcement

The call will be transferred to the defined number, the caller will not hear an announcement before the transfer.

You can set the rules for the incoming calls in the **No answer**, **Do not disturb** and **Off work** dropdown menus, as follows:

- No transfer (the call ends and it will not be transferred)
- To voicemail (the caller will be transferred to the voicemail to leave a message)
- To number (add another phone number to where the call will be transferred)

The image shows two side-by-side screenshots of the 'Work time transfer' settings interface. The left screenshot shows the 'Action when unavailable' dropdown menu with 'Transfer, no announcement' selected. A hand icon points to this option, and a blue arrow points to the right. The right screenshot shows the same interface with 'No answer' selected in the 'Action when unavailable' dropdown. Both screenshots have a 'Save' button at the bottom.

Click the **Save** button to keep the changes!

Off work transfer

Off work transfer

Busy during active call ?
No

Alerting time ?
60

Use transfers ?
Yes

Transfer - All calls ?
No transfer

Transfer - No answer ?
To voicemail

Save

BeneDesk system gives very versatile and flexible possibilities for call management also when a person is not working, e.g. during holidays.

Busy during an active call

- **Yes:** simultaneous callers will hear a busy-tone, other transfer settings will be ignored
- **No:** incoming calls will be handled according to the off work settings

Alerting time

- Time in seconds before the calls are transferred

Use transfers

- Select **Yes**, if you want to transfer the incoming calls during off work
- When selecting **Yes**, the calls can be transferred to a voicemail or to another number

Transfer management

Off work transfer

Busy during active call ?
No

Alerting time ?
60

Use transfers ?
Yes

Transfer - All calls ?
No transfer
No transfer
To menu
To number

Save

Off work transfer

Busy during active call ?
No

Alerting time ?
60

Use transfers ?
Yes

Transfer - All calls ?
To number

To number: +123...

Transfer - No answer ?
To voicemail

Save

You can select, if you wish to transfer calls to another number from the **Transfer – All calls** dropdown menu.

No transfer

Off work transfer

Busy during active call ?
No

Alerting time ?
60

Use transfers ?
No

Save

If you don't want to use transfers, choose **No** from the **Use transfers** dropdown menu.

Click the **Save** button to keep the changes!

Directory

The *BeneDesk* directory opens by clicking the **Directory icon** on the left hand side panel or the **Directory section** on the main page.

The *BeneDesk* Directory includes the following functions:

- **Search** information
- **Edit** information
- **Delete** and **Remove** information

Search

Type the person's name (forename or surname) into the directory's **Search** field and click the **Search** button (or press **Enter** on the keyboard).

You can make searches by:

- Name (forename and/or family name)
- A part of the name
- Phone number

The screenshot shows the BeneDesk web interface. The browser address bar displays "https://www.benedesk.com". The user is logged in as "raimo.asikainen @benemen.com". The main content area features several sections: "Availability", "Settings", "Call information", "Directory", and "BeneCC". The "Directory" section is highlighted with a hand icon pointing to it. A search bar and a search button are visible in the Directory section. A table of search results is shown below the search bar.

Name	Location	Title	Phone numbers	Availability
0600 Ben	Warsaw	Service pool	+358409	
1 Test			+358409	
2 Test			+358409	Available

Directory

The image shows two screenshots of the BeneDesk interface. The left screenshot shows the 'Directory' list with a hand pointing to the 'Edit' button (labeled 2) and the 'Create new' button (labeled 1). The right screenshot shows the 'Directory Entry' form with a hand pointing to the 'Save' button (labeled 3). The form fields include: Email (ra@benemen), First name (Test), Last name (Test), Phonetic name, Description, Work number, Mobile number, Other number, Company, Title, and Country. The 'Save' button is green with a checkmark, and the 'Delete' button is red with a trash icon.

Edit information

1. Choose the person on the list whose information needs to be edited
2. Click the **Edit** button on the bottom of the list page
 - Make the needed edition
3. Save the changes with the **Save** button

Directory

Delete and remove information

Deleting a person's information is started as the information editing. There are two phases when deleting the information from *BeneDesk*:

1. Delete

- A user cannot find the deleted information
- A switchboard operator can find the information from the *deleted person's list*
 - In this way the switchboard operator is able help in possible inquiries and tell who is the person's substitute

2. Remove

- The information will be removed completely from the system

1 Delete

Deleting the information is done by selecting a person from the list and clicking the **Edit** and **Delete** buttons. The deletion is confirmed by clicking the **Are you sure?** button.

2 Remove

Removing the information is done from the **deleted persons list**, so to remove information from the directory, the deleted information must be first searched. *BeneDesk* lists the deleted information, when:

- Clicking the **All fields** button
- Typing *deleted* into the **Search** field
- Clicking the **Search** button

Notice that removing the information requires a Switchboard user or a Supervisor user license.

The screenshot shows the 'Directory Entry' form in BeneDesk. The form fields include Email (ra@benemen), First name (Test), Last name (Test), Phonetic name, Description, Work number, and Mobile number. A hand is shown clicking the 'Delete' button at the bottom of the form. This action triggers a confirmation dialog box with two buttons: 'Save' and 'Are you sure?'. The 'Are you sure?' button is highlighted with a red oval, indicating it is the next step in the deletion process.

The screenshot shows the 'Directory' list in BeneDesk. The list contains the following entries:

Name	Location	Title	Phone numbers	Availability
Benemen			+35894	
BenemenOperator Soittorobotti1			+35894	
Eli			+35846	

A hand is shown clicking the '+ All fields' button, typing 'deleted' into the search field, and clicking the 'Search' button. The search results are filtered to show only the 'deleted' entries.

Implementing CallBack in BeneDesk

BeneDesk

Home

Availability

Settings

Call information

Directory

BeneCC

Service pool management

Service calls

Call handling

Call handling

Handle missed service calls and outbound calling

Call list

CPM List

Last filter

More

Call item status

Open

Channel in

Created

Expiry Date

Not set

Not set

Last attempt

Select

Search

Showing 1 to 4 of 4 entries

Select	Channel	Created	Due Date	Expiry Date	Closed	Number	Topic	Assigned to	Call count	Last attempt	Info
<input type="checkbox"/>	Test Bene 2	9/12/2019 10:57 PM			Open	+35840764		Me	0		Open
<input type="checkbox"/>	Bene 2	8/13/2019 12:15 PM									Open
<input type="checkbox"/>	Bene 2	5/2/2019 11:00 AM									Open
<input type="checkbox"/>		2/19/2019 10:51 AM									Open

Show 25 entries

Select all

Back to the call list

CPM List

New users to add

Add Name

example@benemen.com

example@benemen.com

example@benemen.com

example@benemen.com

Serving users

Remove Name

example@benemen.com

Save

Implementing CallBack for mobile users

1. Open **Call handling**
2. Select a **call list** from the dropdown menu
3. Click the **Search** button to open the list
4. To select persons to the list, click the **Manage** button
5. **Select** the **users** from the list
6. Save the changes with the **Save** button

Notice! The name of the selected call list is shown on the upper left-hand corner of the list.

Implementing CallBack in BeneAPP

CallBack in BeneAPP

Implementing the CallBack

1. Open the **menu** on the screen's upper right-hand corner
2. Choose **Lists**
3. Select the wanted **Call list**

