# BeneVoice

## for mobile app 3.0

Android and iOS

**Quick Start Guide**

# Main page

Functions available from main page are:

- Settings
- Availability
- Directory
- Call history
- Service pool management
- Service calls
- Classification
- Call handling
- BeneDesk

See the following pages for description on each function.

Access to features may depend on the user's BeneCloud user role and optional products activated.

There are also small user interface differences between Android and iOS versions which are highlighted in this document.
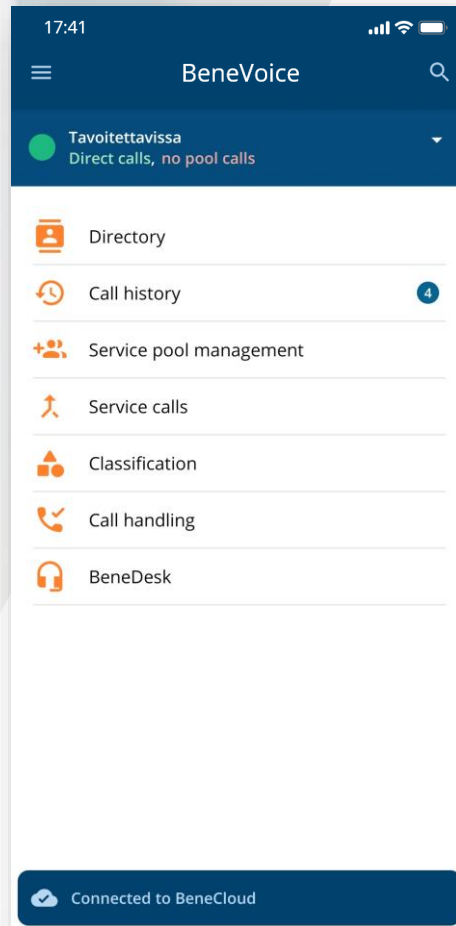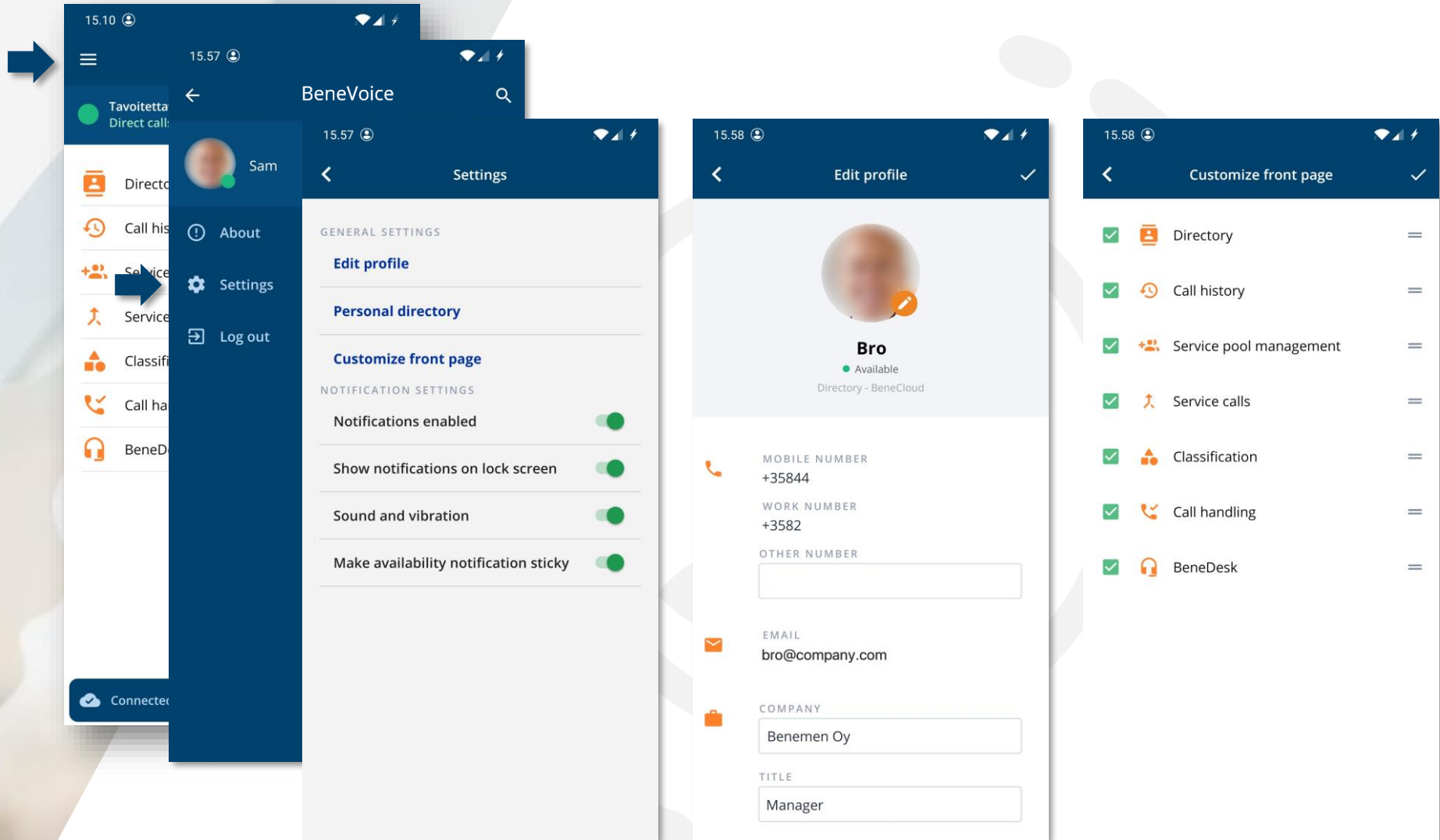
# BeneVoice settings

Settings can be accessed from top left menu.

Settings include:

- Edit your own profile and contact information
- Personal directory
- Customization of BeneVoice front page (Android only)
- Notification settings for controlling how different notifications from the app behave
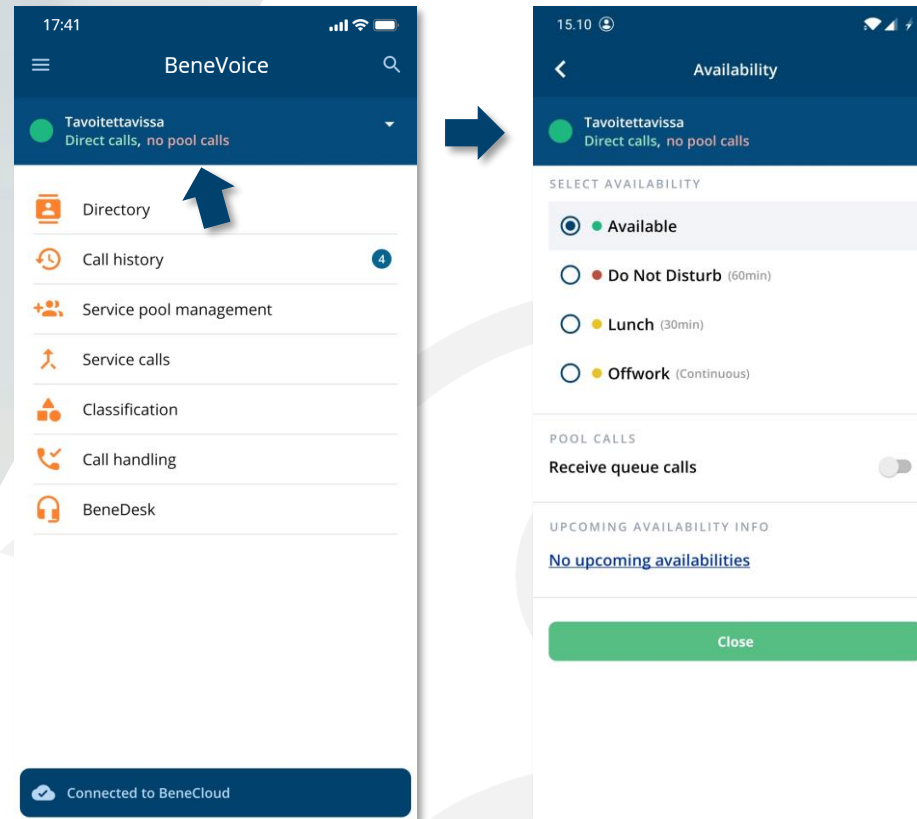
# Availability

**Setting the availability**

The availability settings in the BeneVoice are:

- Available
- Do Not Disturb
- Lunch
- Offwork

Changing the availability status takes effect immediately.

| Status | Function |
|---|---|
| 🟢 Available | The status is continuous and it's valid until the next status change |
| 🔴 Do Not Disturb | The status is valid for 60 minutes, then it returns to Available |
| 🟡 Lunch | The status is valid for 30 minutes, then it returns to Available |
| 🟡 Offwork | The status is continuous and it's valid until the next status change |

The availability setting is visible to others in the organization's directory and the status also effects the call routing. For example, when a person's availability is set to "Offwork", the incoming calls can be routed automatically to another phone number.
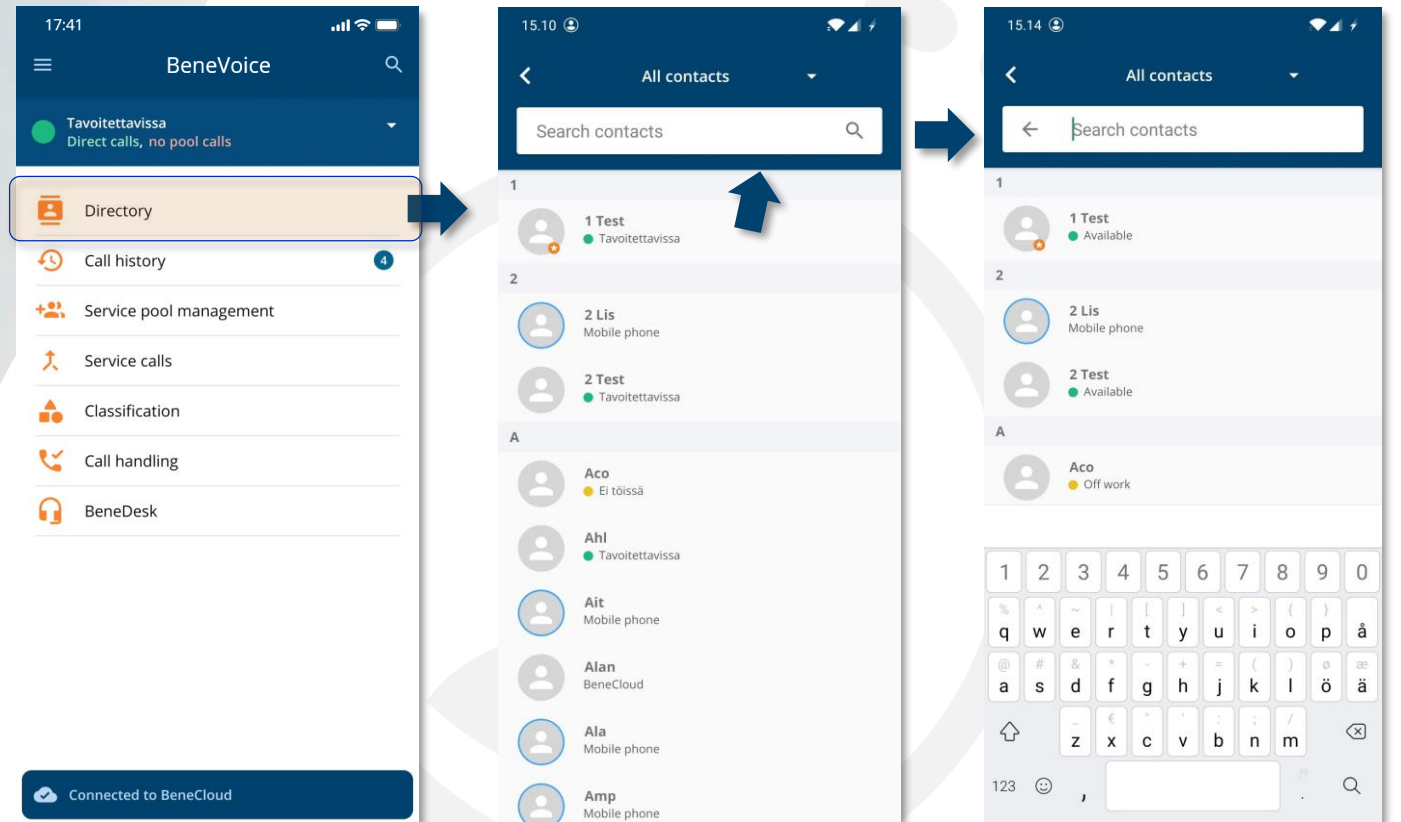
# Directory

Organization's **Directory** can be accessed from main page

## Using the directory

The **Search** function operates by typing a person's name on the search field.

The search operates with:
- First name
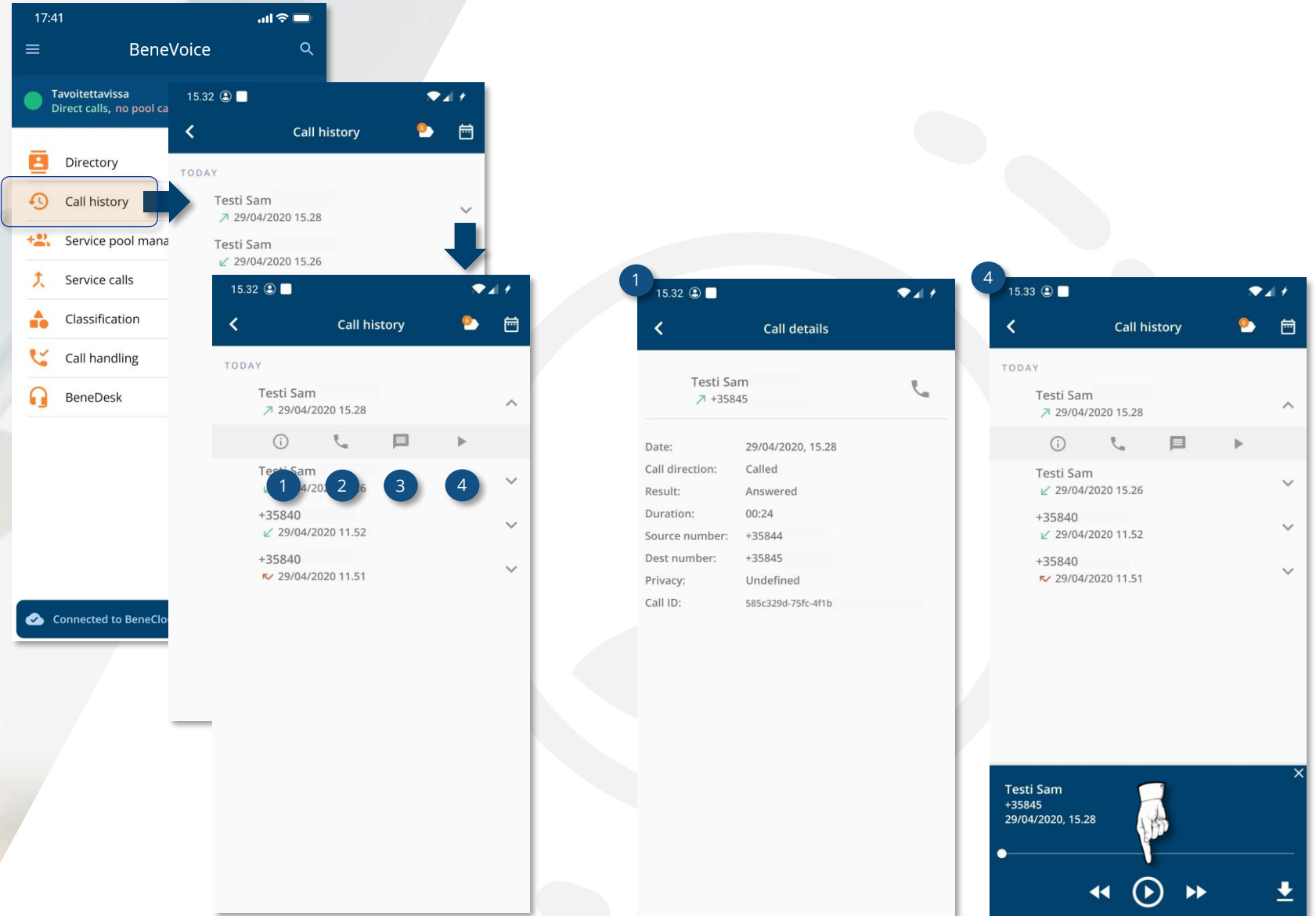- Family name
- A part of a name

# Call history 1

Call history view shows all direct calls you have received or answered.

## Call history functionalities

Clicking on **arrow symbol down** on each call displays related functions:

1. Detailed call information
2. Calling to the number
3. Sending an SMS to the number
4. Call recording playback

# Call history 2

## Other functions

1. Privacy settings
   On the privacy settings it is possible to tag a call as a private or a work call
2. Calendar
   The calls can be searched within a specific time range



Automatic categorization

Multi-select to tag multiple items at once

Calendar

# Service pool management 1

In the *Service pool management* view, it is possible to **edit service pools** by clicking a pool name – or anywhere in the pool container area.

1. To select if you are *Active / Not active* in a service pool, use the **switch** in front of the pool name. This is only available if you have been added to the service pool.
2. **Adding users** is done by using the orange **plus** icon at bottom of the view
3. The **Serving** users tab displays the current active users of the pool
4. **All users** tab displays all users who have been added to the pool
5. **Detailed user information** can be seen by clicking the **Arrow** icon next to user. It is possible to:
   6. Change the **Active** status in this pool for a user
   7. See other **status** information
   8. Set the skill by using the **Skill slider**
   9. **Remove** user from the pool
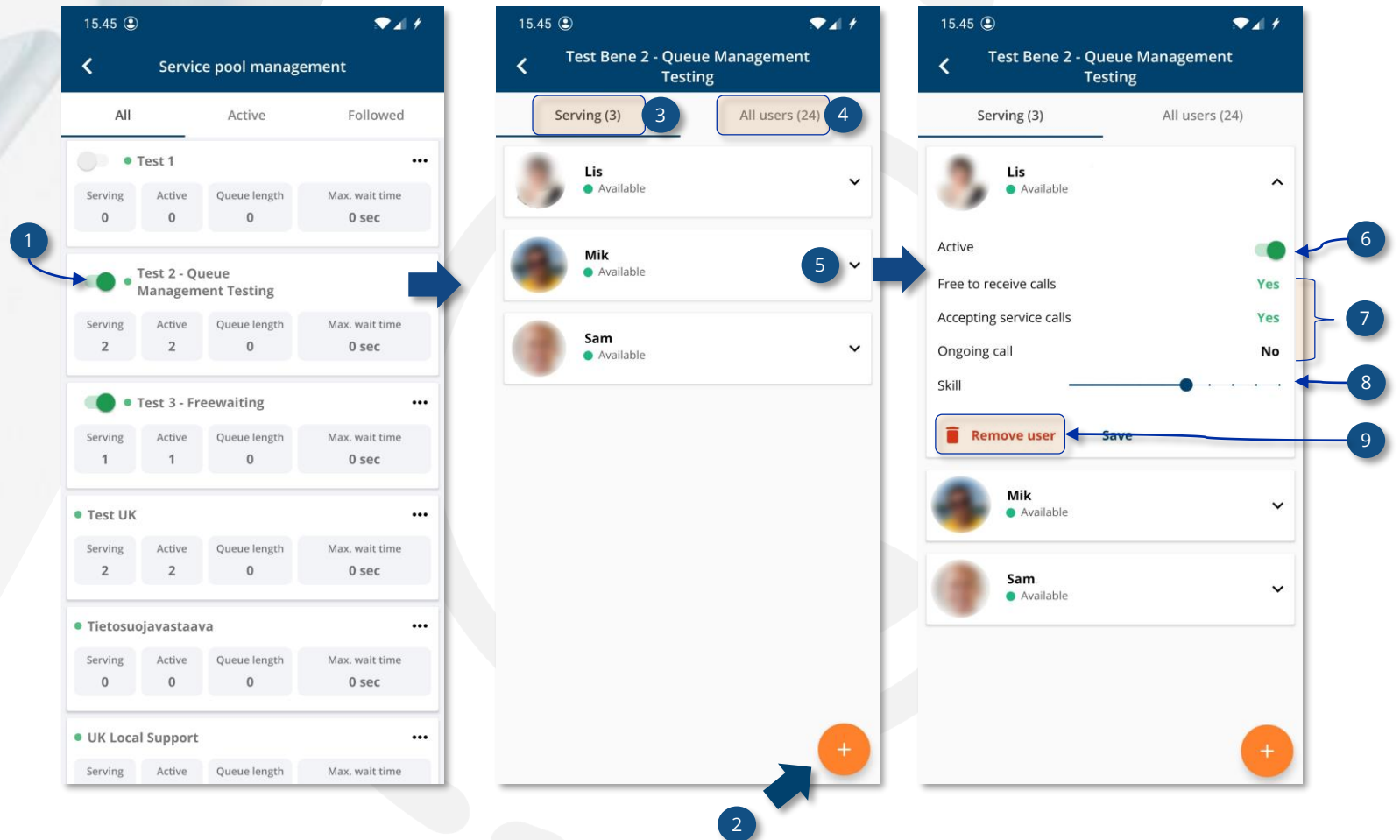
# Service pool management 2

On the Service pool management main view, a menu with additional functions can be opened from the three dots:

- **Leave or join** a pool
- **Follow or unfollow** a pool. Followed pools are visible on the Followed tab.
- Manage **Notifications** (available if you are added to the pool)

*Please note: On iOS, the menu appears at bottom of screen*

On the *Notifications*, it is possible to receive notifications on BeneVoice mobile app with following criteria:

- **Max waiting time** (min/sec) is over the set limit
- The amount of **serving agents** is over or below the set limit
- The amount of **calls in queue** is over or below the set limit

All above notification limits can be set by the user if the user has been added to the pool. Notifications are only seen by the user who set them, meaning the notifications are not shared to other users.
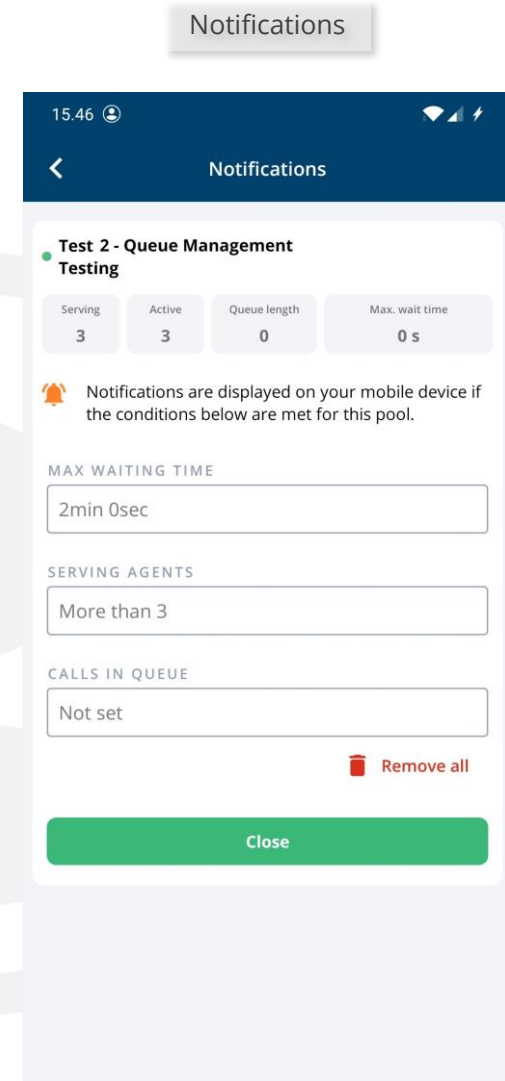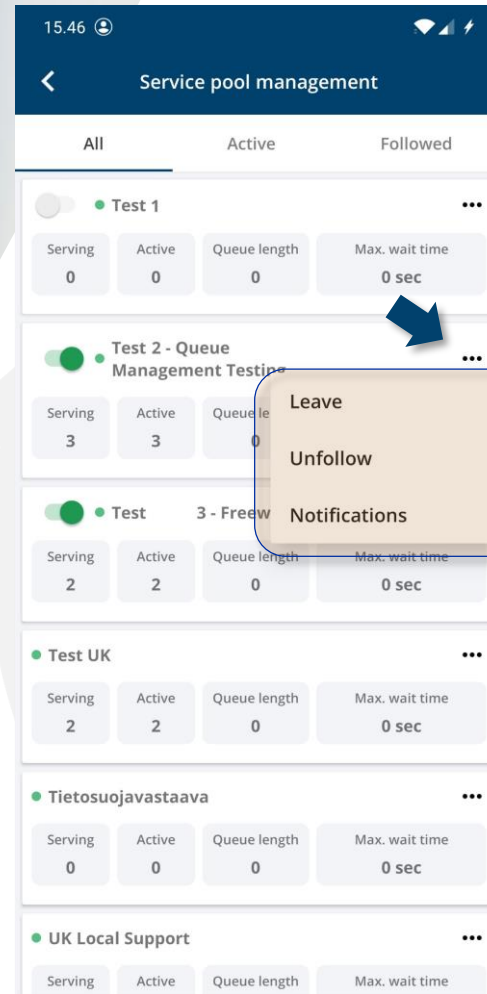
# Service calls

In the **Service calls**, you can see all calls received in service pools. Calls are grouped per date.

Each call can be expanded to view the details of the call. These details include information about who called, which service pool was called, who answered, waiting time, etc.

With the filter function at top right, it is also possible to view calls with a specific search criteria.

# Classification

The **Classification** button opens the view for classifying service calls.

The specific content of the classifications depends on the organization's needs and how they have built the classifications and the criteria inside.

Classifications can be set for service calls on BeneVoice mobile app, but classification schemas cannot be created or edited on the mobile app.

*Please note: Classifications are not available on iOS version.*
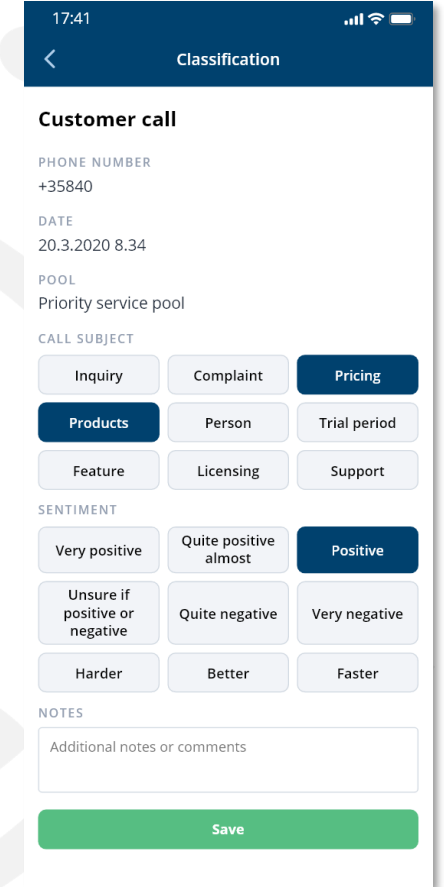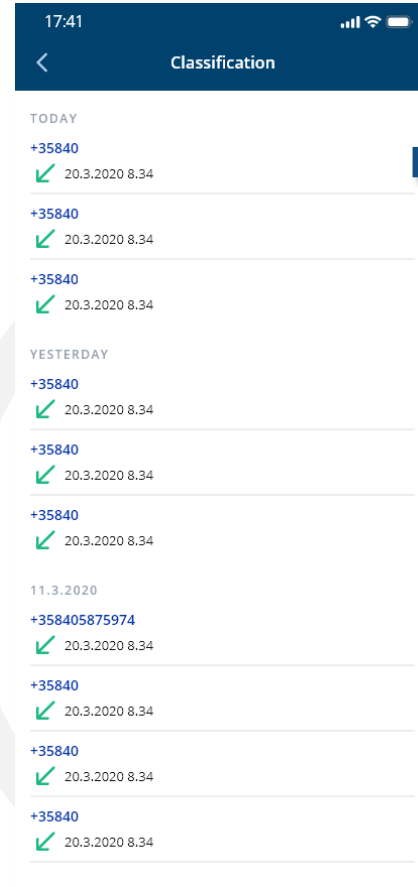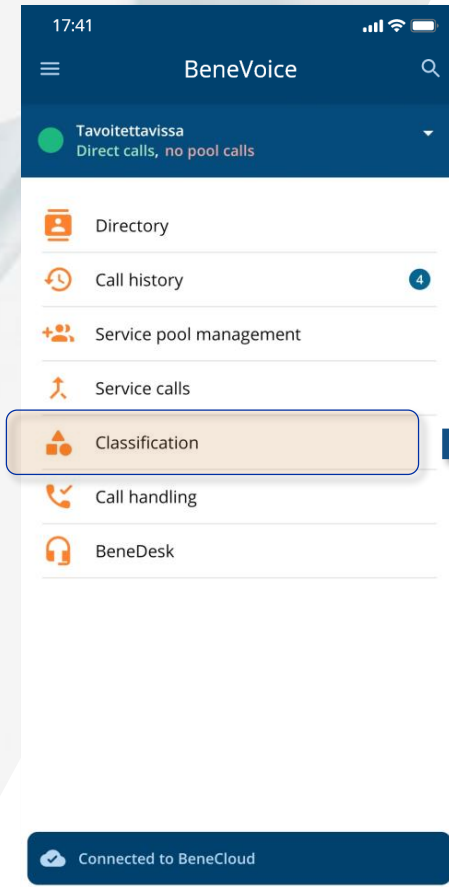
# Call handling

- Callback list items can be grouped by caller number between call lists and service pools

- Callback item can be closed automatically when handled by the agent

- When an agent opens a callback item, the item is automatically reserved

**Callbacks can be collected from the following service calls**

- Missed calls

- Dropped calls

- Manual callback items

**Agent can handle callback items on BeneVoice mobile app**

Grouping of related callback items:

- Avoid duplicate calls to the same customer

- Group by caller number

- Between callback lists and service pools

- Agent can see and handle the related callback items
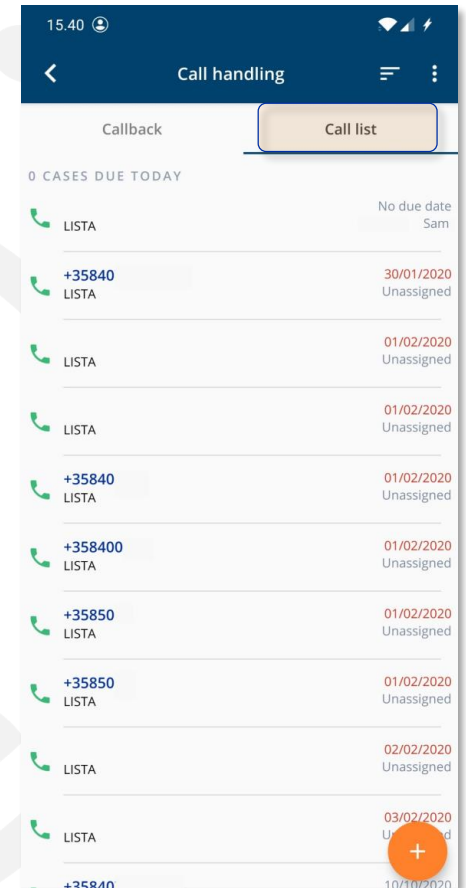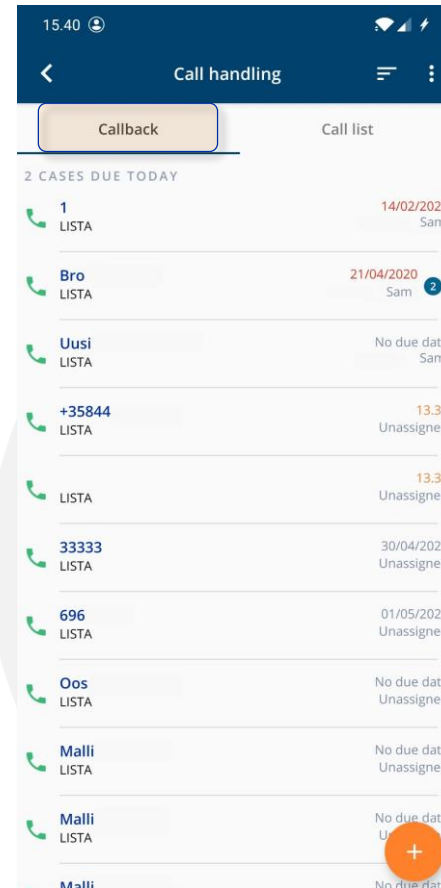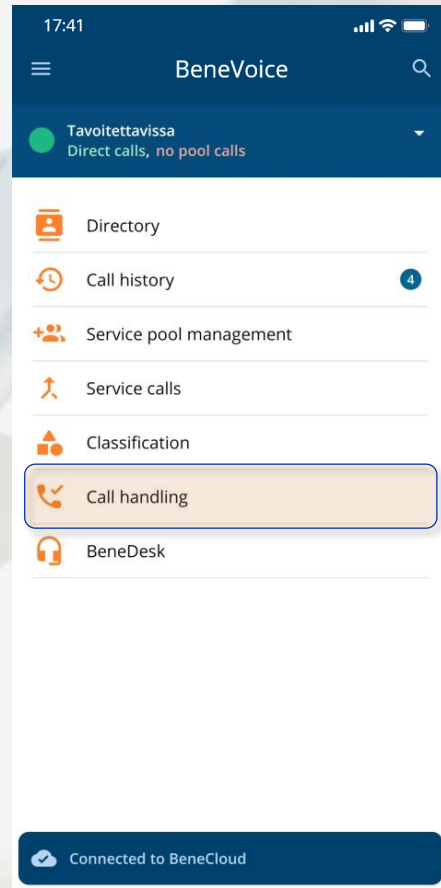
**Agent notifications**

- BeneVoice notifies the agent about new callback items

# Call handling

## Callback and Call list
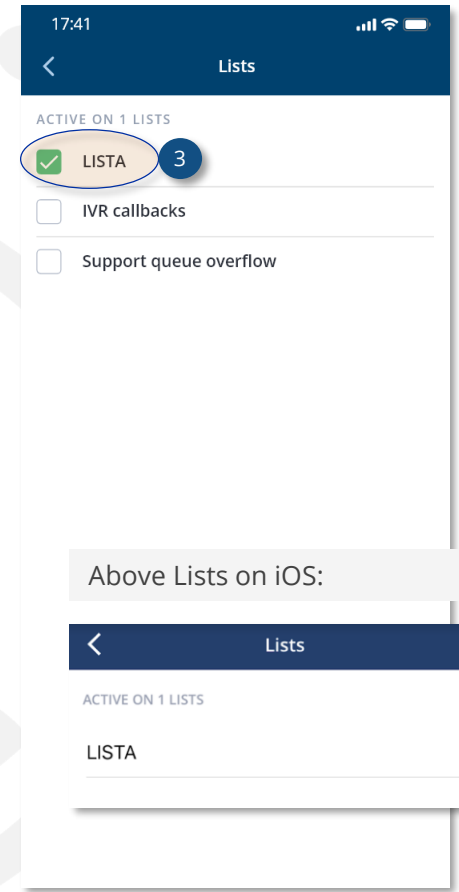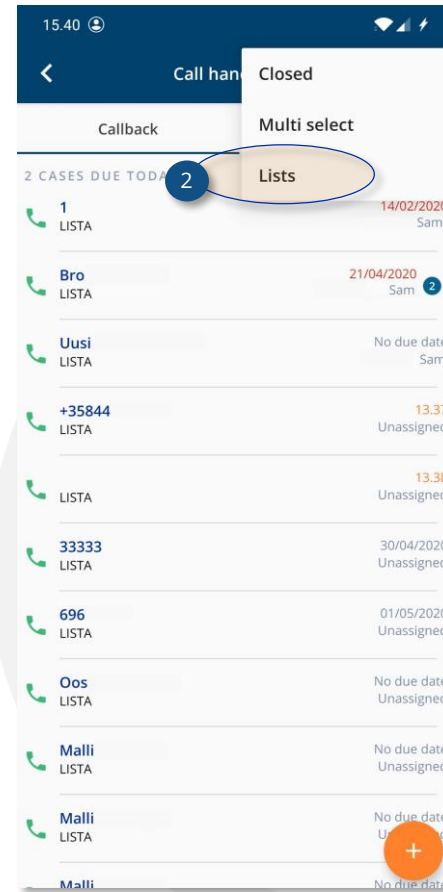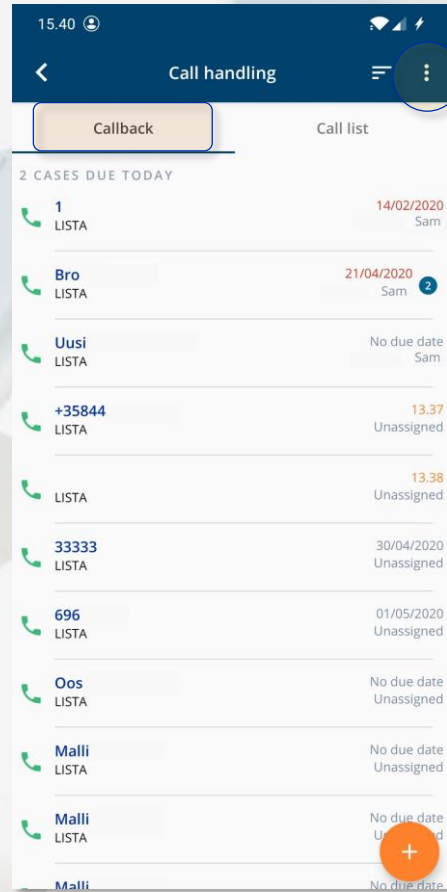
The Call handling is divided into two tabs
- Callback
- Call lists

# Callback lists

1. Open the **menu** on the screen's upper right-hand corner
2. Choose **Lists**
3. Select the **callback lists** you wish to receive callbacks from

*Please note: On iOS, the menu appears at bottom of screen*

# Callback

**Details and calling**

- Choose a call item from the list view
- Details of the call item, such as notes and dates, are displayed here
- Call the number from green **Call** button at bottom
- The case is assigned to yourself from the **Assign to me** button
  - When a call case is assigned to a user, it is not available for other users
  - This prevents other users from making the same call
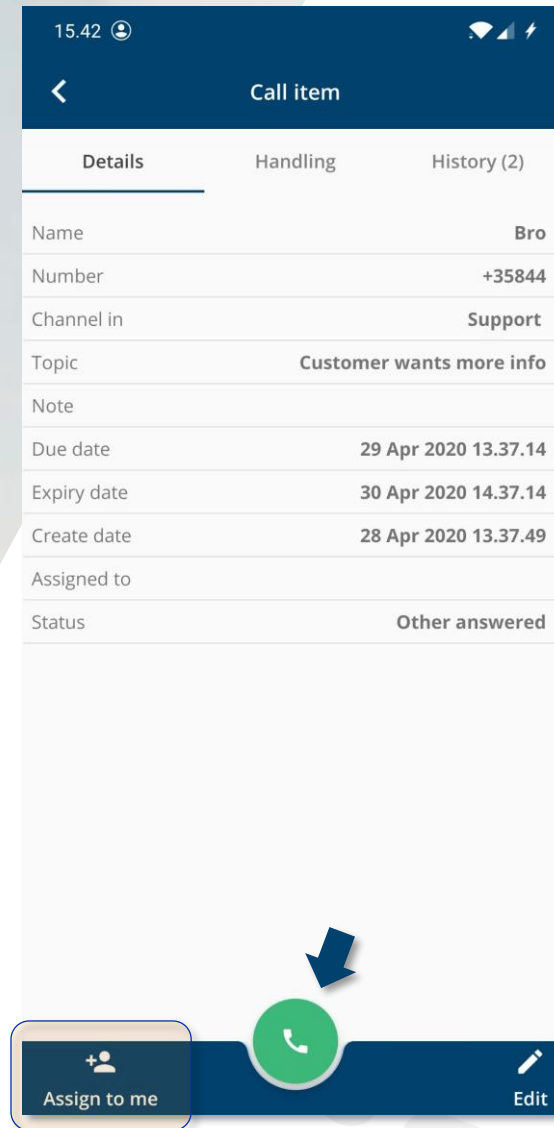
# Callback

**Handling**

- Choose a call from the list
- Choose one of the following options on the **Handling** view to set the status after your call:
    - Close successful
    - Close unsuccessful
    - Busy
    - No answer
    - Other answered

Additional note related to your call attempt can given.
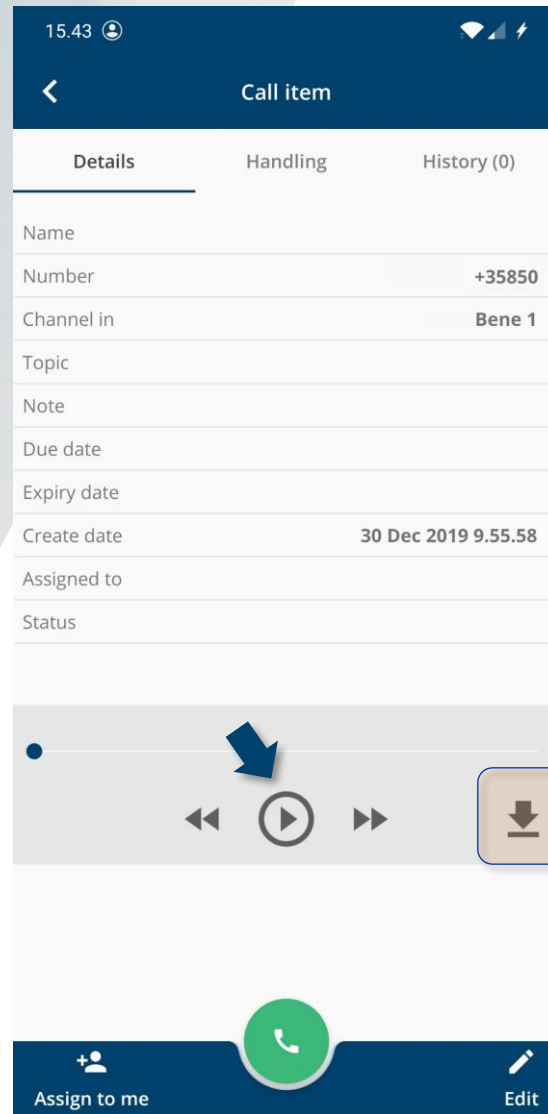
The changes are saved with the **Save** button.
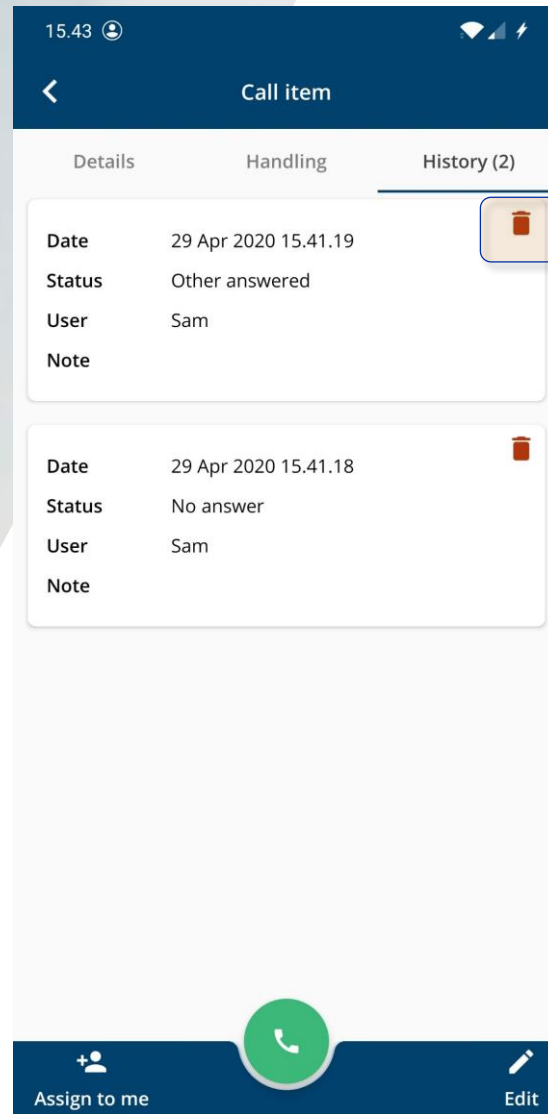
# Callback

### Voicemail message

A voicemail message may be attached to a callback request. Use the **Play** button to listen the message. The voicemail message can also be saved to the user's mobile device with the **Save** icon.
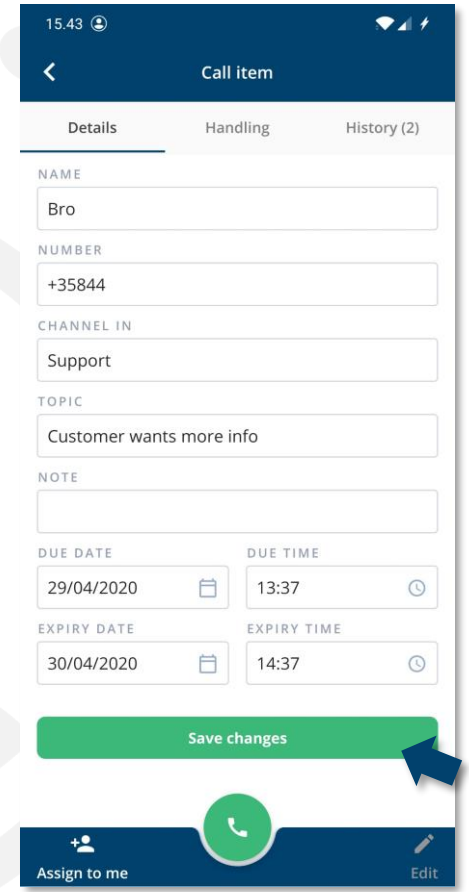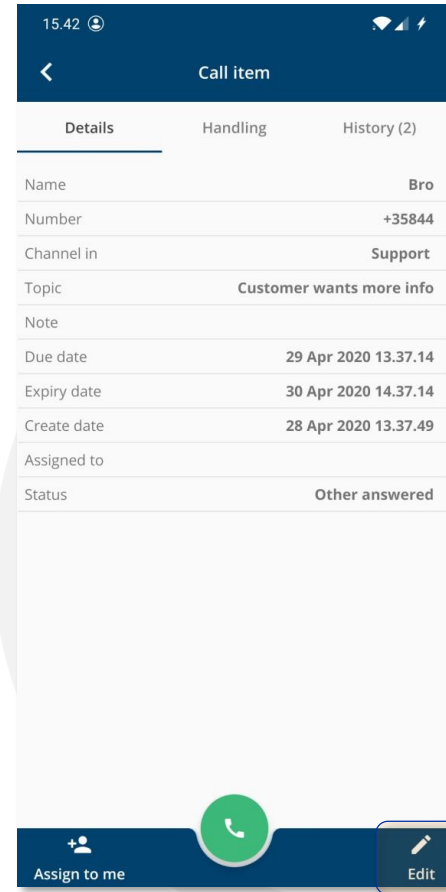
# Callback

**History**

The case's handling history is shown on the **History** tab.
History states can be removed with the trashcan symbol.
This depends on user's access rights.

# Callback

### Editing the information

The call item information can be edited from the **Edit** button, which can be used from all three call item tabs (Details, Handling, History). The edited information is saved with the **Save changes** button.



benemen
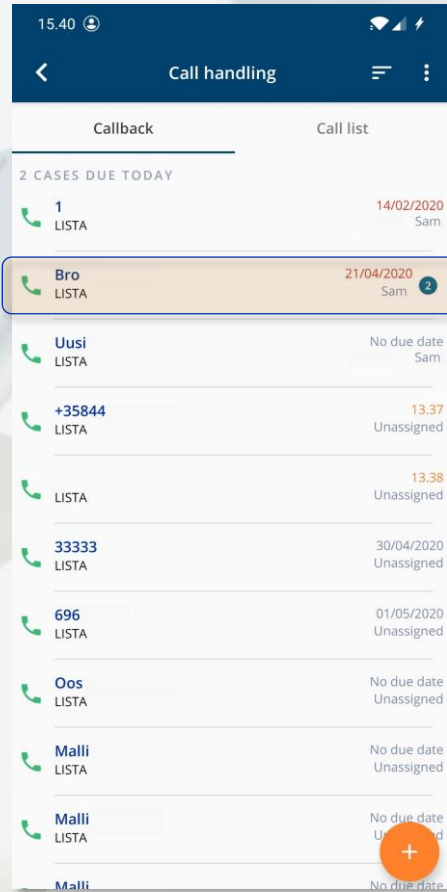
# Call list

Call items on this tab are typically coming from different source than on Callback tab. This depends on the customer requirements and configuration. Item handling is same as on Callback tab.
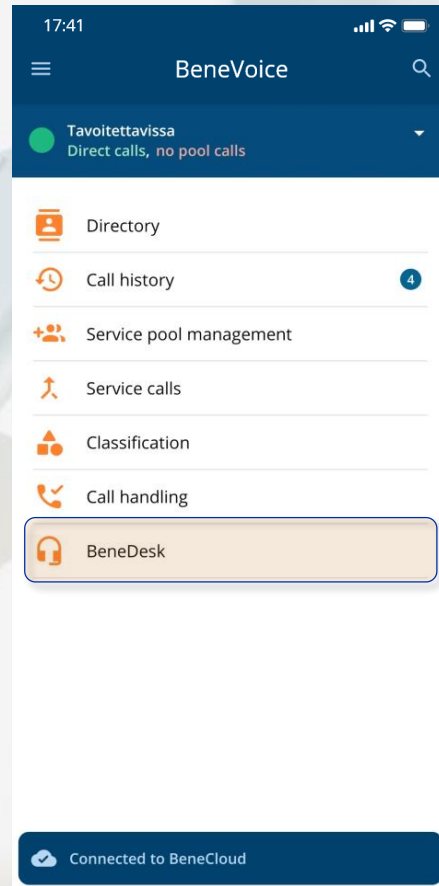
To edit information in a call record see *Editing the information.*

# BeneDesk

*BeneDesk* functions available are:

- General settings
- BeneCC

# BeneDesk General Settings 1

The following settings can be found by scrolling down the *BeneDesk* **General settings**:

- Call handling
- Work schedule
- Work time transfer
- Additional features
- Off work transfer
- Common
- Phone numbers

# BeneDesk General Settings 2

The following settings can be found by scrolling down the *BeneDesk* **General settings**:

- Call handling
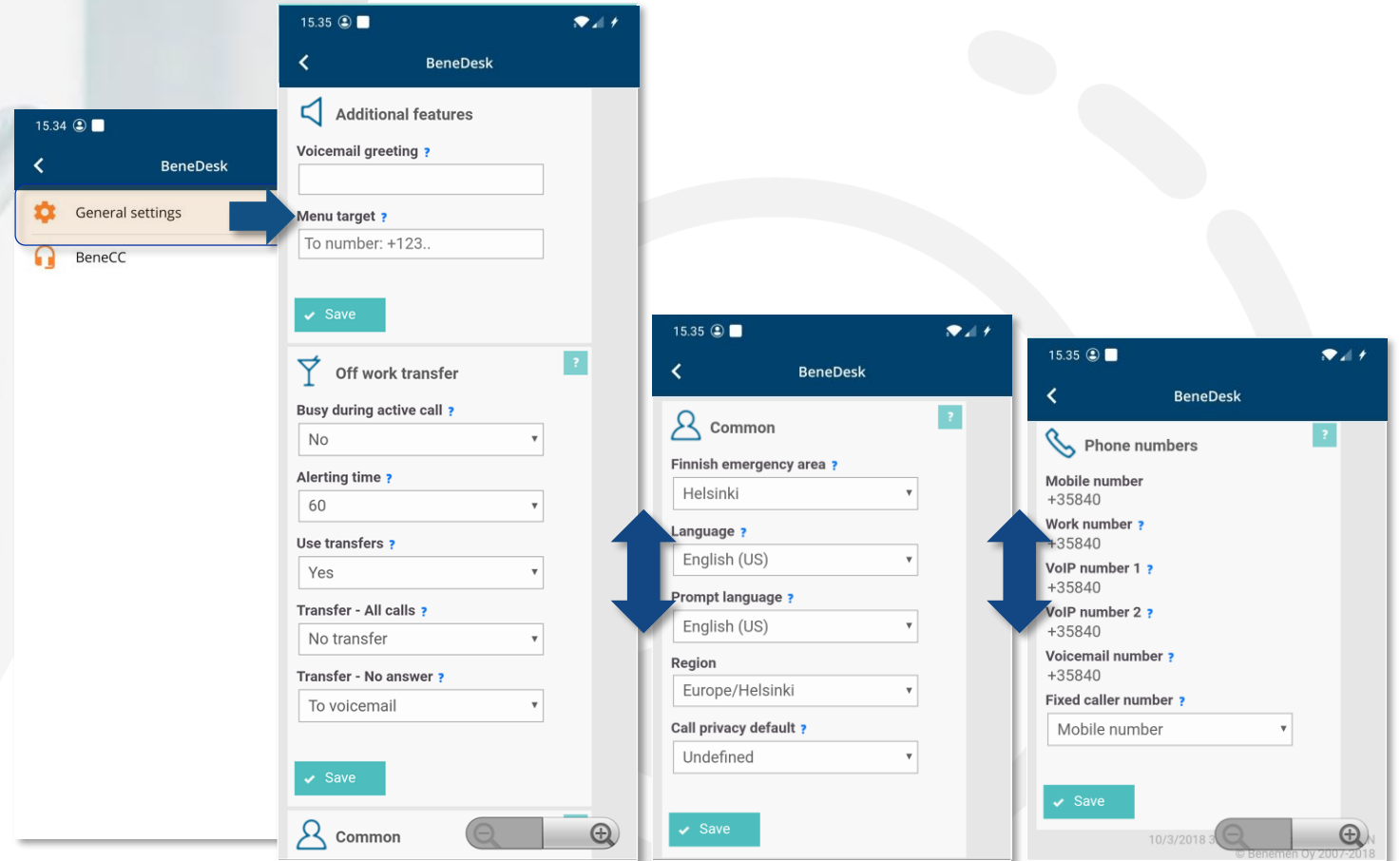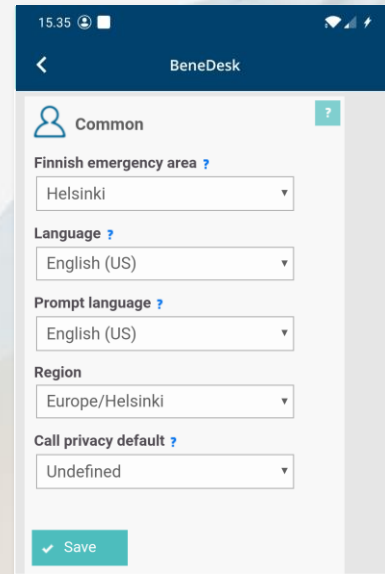- Work schedule
- Work time transfer
- Additional features
- Off work transfer
- Common
- Phone numbers

# Using the BeneDesk

**General settings:**
**Common**



**Common**
When changing the settings, it is advisable to first change the language and region settings in the **Common** section. Usually this will be set to your own language when the software is delivered, but check and change it, if needed.

- Changing the language will change the *BeneDesk* menu language to the preferred language
- By changing the prompt language setting, the announcements played to the caller will be in the preferred language. This guide will only cover the menu in the English language settings.

**Note!**
*This instruction for changing the language applies only to the BeneDesk part of the application. Changing the other parts of the BeneVoice mobile app must be done from the mobile device language settings.*

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

# Using the BeneDesk

**General settings:**
**Call handling**



**Call handling**
A wanted usage mode can be chosen in the **Mobile phone and number usage mode** menu. If you have a Benemen mobile subscription you can choose between three usage modes:

1. **Not in work use**
2. **Full work use**
3. **Partial work use**

For a full description of the usage modes, please refer to
Appendix 1: Mobile phone and number usage modes

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

# Using the BeneDesk

**General settings:
Work schedule**



**Work schedule**
In this section, you can choose functions, which change automatically your availability status according to your working hours. If you choose Yes and input your work hours, your availability status updates accordingly.

Your availability status starts from the selected start time and ends at the specified end time. If you change your availability afterwards, it does not affect to the scheduled availability information.

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

# Using the BeneDesk
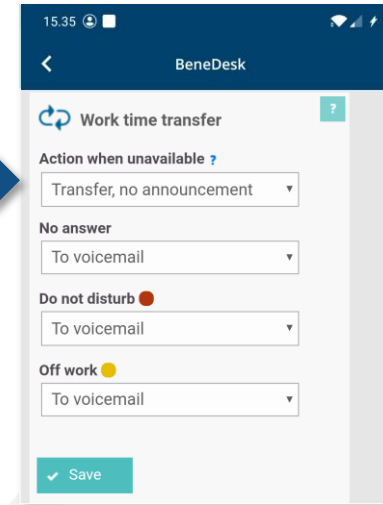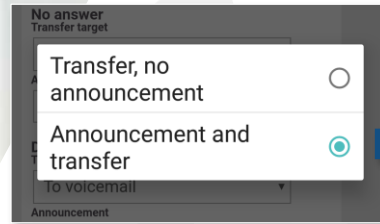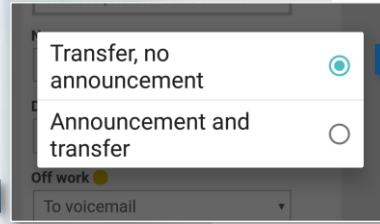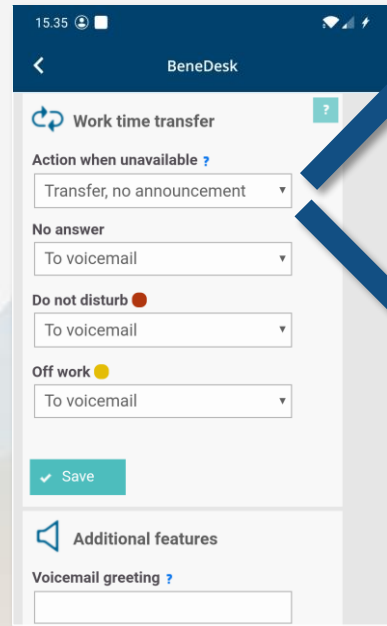
**General settings:**
**Work time transfer**

In the Work time transfer section, you can manage how the incoming calls are handled, when you are not available.

**Transfer, no announcement**
Calls will be transferred to a specified number, not an announcement will be played to the caller
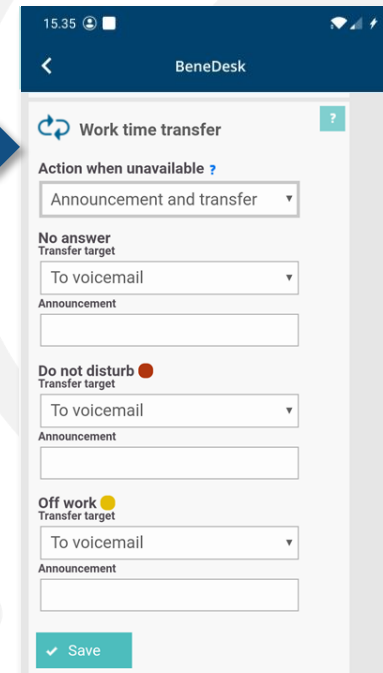
**An announcement and transfer**
The caller will hear an announcement before the call will be transferred



**Transfer, no announcement**

The incoming call settings are done in the dropdown menus *No answer, Do not disturb and Off work*, of which options are:
• **No transfer** (calls will not be transferred, and they will be ended)
• **To voicemail** (calls will be transferred to the voicemail, where the caller can leave a message)
• **To number** (the user can add a phone number to where the calls will be transferred)
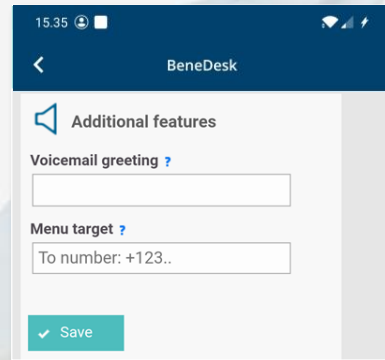
**An announcement and transfer**

Write an announcement, which you wish the caller to hear, to the **Announcement** field. The written text will be changed to speech by the Benemen's text-to-speech function.

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

# Using the BeneDesk

**General settings:
Additional features**



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

**Additional features (if using the voicemail)**

- **Voicemail greeting** write a greeting to the Voicemail greeting field. Benemen's text-to-speech function plays the greeting to callers before they can leave a voicemail message.
- **Menu target:** an optional target number that incoming callers can choose to be transferred to.
- **Hint:** Alternatively, you can record your own spoken message in the voicemail menu.

# Using the BeneDesk

**General settings:**
**Off work transfer**

*BeneDesk* includes also a lot of options to route incoming calls when a person is off duty.

**Busy during active call-menu**
- **Yes:** incoming calls get a busy-signal when there is already an active ongoing call, other transfer settings are ignored
- **No:** incoming calls are transferred according to the off-work transfer settings

**Alerting time**
- Time in seconds before the call is redirected

**Use transfers**
- Choose **Yes**, if the incoming calls should be transferred when off duty
- In the *Yes*-state, the incoming calls can be transferred to the voicemail or to another number
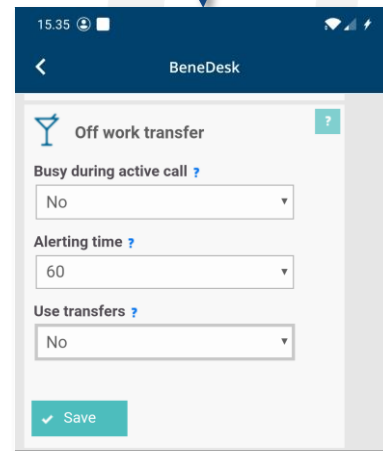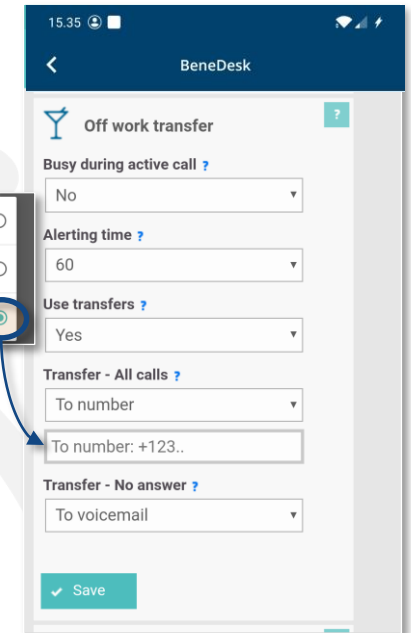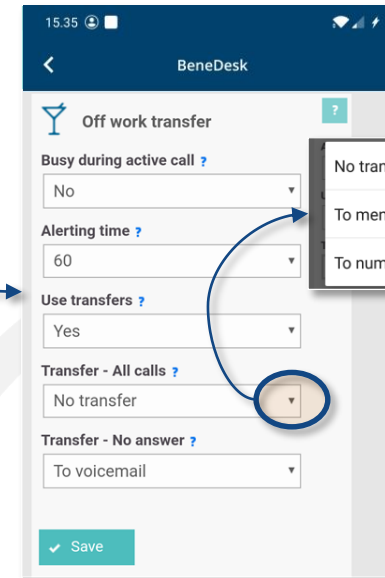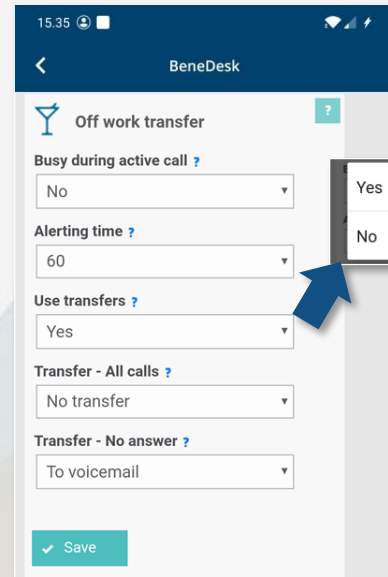
**Controlling the transfers**
In the **Transfer - All calls** menu, it is possible to choose, if the incoming calls should be transferred to another number.
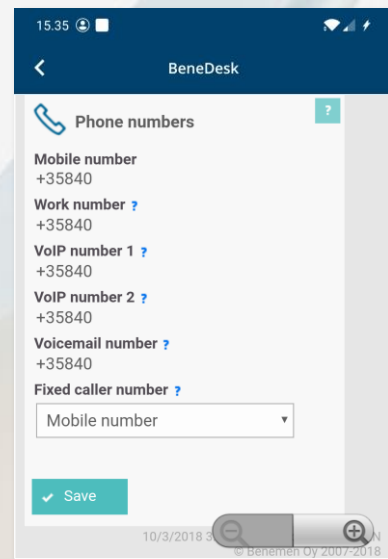
**No transfer**
If you don't want to transfer the incoming calls, choose **No** in the menu.

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

# Using the BeneDesk

**General settings:**
**Phone numbers**



**Phone numbers**
The **Phone numbers** section shows all the numbers linked to your account. In this section, it is possible to set the number, which is shown to the receiver, when you make a call.

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

# BeneCC

**BeneCC**

*BeneCC* is gives a possibility to use the switchboard and handle the service pool calls with a mobile phone.
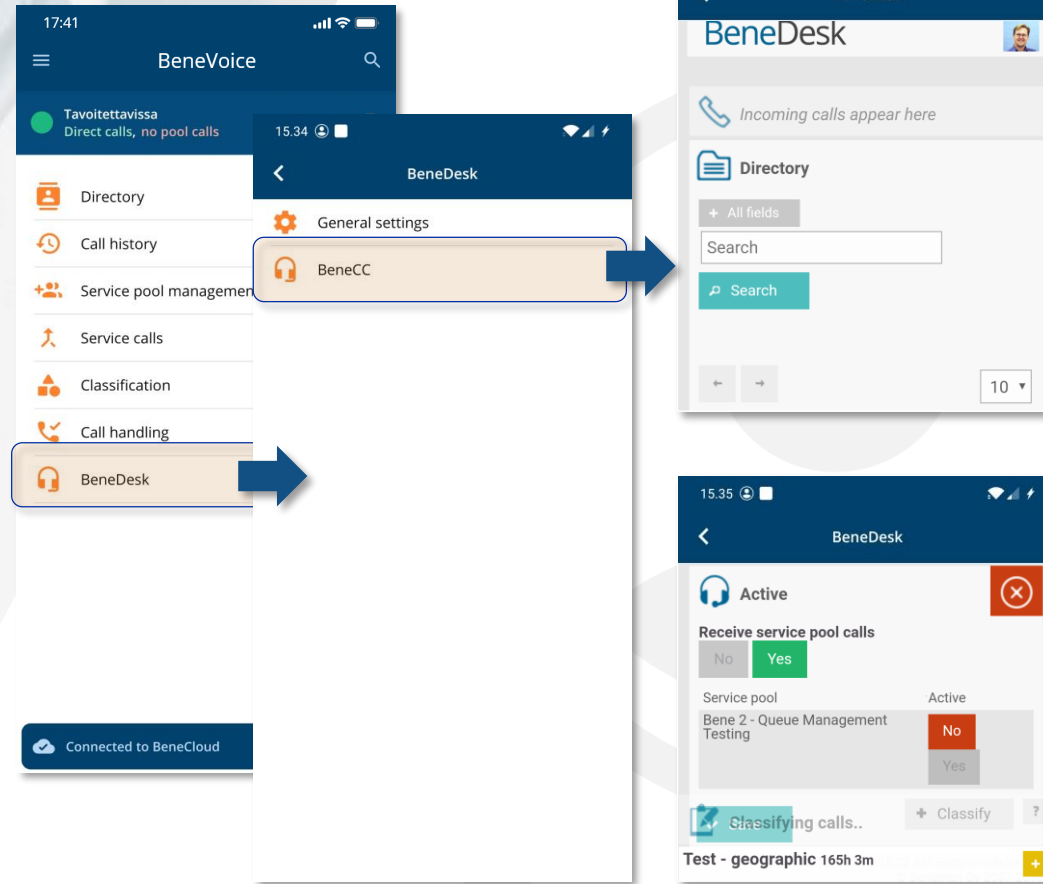


On the upper part of the *BeneCC*, it is possible to use the switchboard functions.

The service pools and service pool functions can be found on the lower part of the *BeneCC* application.

# Appendix 1 – user profiles

**Mobile phone and number usage**

**Not in work use**
Work number and service calls are not routed to mobile device
- Calls out from the mobile device show the mobile number
- Incoming calls to the mobile number are passed straight to the mobile device regardless of schedule, availability and other settings.
Call transfers work according to off work transfer settings with no prompts

**Full work use**
During work time, i.e. when work schedule is in use and active, or if work schedule is not used:
- Incoming calls to mobile number are handled as if they arrived to work number, making them use work time prompts, transfers and availability.
- Work and service calls can be routed to mobile device according to terminal priority and allocation style settings.
- Incoming calls to mobile number are routed according to terminal priority, except that mobile device is always present in the terminal list.
- Calls out from mobile device show work number.
When off-work, i.e. when work schedule is in use and inactive, or if availability state is "Off work":
- Incoming calls to mobile number are routed directly to mobile device regardless of schedule, availability and other settings
- Calls out from mobile device show mobile number
- Call transfers follow off-work transfer settings with no prompts

**Partial work use**
During work time, i.e. when work schedule is in use and active, or if work schedule is not used:
- Incoming calls to mobile number are routed directly to mobile device regardless of schedule, availability and other settings
- Incoming calls to mobile are transferred according to off-work transfer settings
- Work and service calls are routed to mobile according to terminal priority and allocation style settings
- Incoming calls to work number user work time transfers settings and availability
- Calls made out from mobile device show mobile number
When off-work, i.e. when work schedule is in use and inactive, or if availability state is "Off work":
- Incoming calls to mobile number are routed directly to mobile device regardless of schedule, availability and other settings
- Calls made out from mobile device show mobile number
- Work and service calls are not routed to mobile device
- Call transfers work according to off-work transfer settings

**benemen**