Kandy Business Solutions

Call Center (CC) Agent Console User Guide

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What's new for Kandy Business Solutions Call Center Agents in version 48.1

Kandy Business Solutions (KBS) 48.1 includes new, changed, and deprecated features.

Revision 01.06

September 16, 2020. KBS 48.1.

Kandy Call Center Attendant Console Consultative Transfer

The Consult Transfer (also known as supervised transfer) functionality within the Kandy Call Center (KCC) Attendant Console soft client is not currently supported.

This does not affect agents using SIP Phones - only the softphone. As an alternative to this feature, console users can use the blind transfer function or if you do need to announce the transfer, utilize the conference feature and before merging the two calls, speak to the transferring party then join the calls and drop your end.

Revision 01.05

July 28, 2020. KBS 47.2.

CRM Integration appendix

"Appendix A: CRM integration" (page 25) was added to this document to address CRM integration with KCC.

Revision 01.04

May 10, 2018. KBS 2.0.

Ribbon rebranding

The company name has been changed to Ribbon.

Call parked timer

When a call is parked, the call record displayed in the Park tab contains a running timer showing the time elapsed since the call has been parked. Each entry in the Park tab should have its own running timer. If a call is retrieved from park, the running timers of the remaining parked calls are not affected.

Revision 01.03

November 1, 2017. KBS 2.0.

Ready/Not Ready

Agents can now be logged in but switch between “Ready” and “Not Ready” status. The calls are passed only to agents in “Ready” status.

After Call Work

Agents that have just taken a call are now kept free for a period of time to address after call work.

Revision 01.02

June 1, 2017. KBS 2.0.

Formatting

The document title and formatting was changed to reflect the purpose of the described information.

Kandy Business Solutions Call Center Agent Console overview

The described information outlines the Agent Console functionality available to KBS Call Center (KCC) end users and administrators.

The KCC Agent Console is used by Agents for managing and answering service queue calls and service queue membership. The Console offers a soft-client application that can be used in combination with a user's IP terminal, but offers easy access to many KCC services that are not available from a standard IP terminal.

The KBS Agent Console is a web-based software. This approach offers various advantages compared to the standard PC client, including the possibility for users to access the application from any desktop PC, always getting the same configuration, regardless of where the agent is sitting (seat-less option).

> *Note:* This is the same Console Application that can be used in KCC as a standalone Operator Console client application. In Operator Console configurations where callers have direct access to the Operator's directory number, the described queue information does not apply.

The Agent Console offers a clean and easy to use modular layout through which Agents have access to full in-call controls (including Transfer, Park & Camp-On), Call History, Centralized Directory, Configurable Speed dial/ Short-Cuts, Quick Memo and Reminders, Inter-Agent Presence and Park Tab.

The UI allows Agents to manage service queues, view the number of calls waiting, and view connected Agents in their queue.

Through the Call Status area Agents can elect whether to see current offered call only or also view other calls in queue (which are not offered to them). For calls in queue the Console UI allows selective pick-up from the queue.

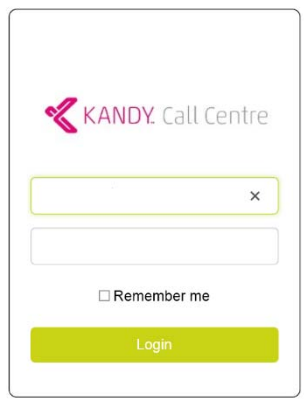
The Console application is a WebRTC based client, with wide browser support.

System requirements are available at http://www.midasolutions.com/community/kbsbrowsercompatibility/.

> *Note:* Users must have **Agent** access level to access and use KBS Agent Console.

The Uniform Resource Locator (URL) of the KBS Call Center Agent portal is specific to each Customer. Navigate to the correct URL and log into the Call Center portal by providing a Username and Password.

KCC login screen



The following features are available on the Agent Console:

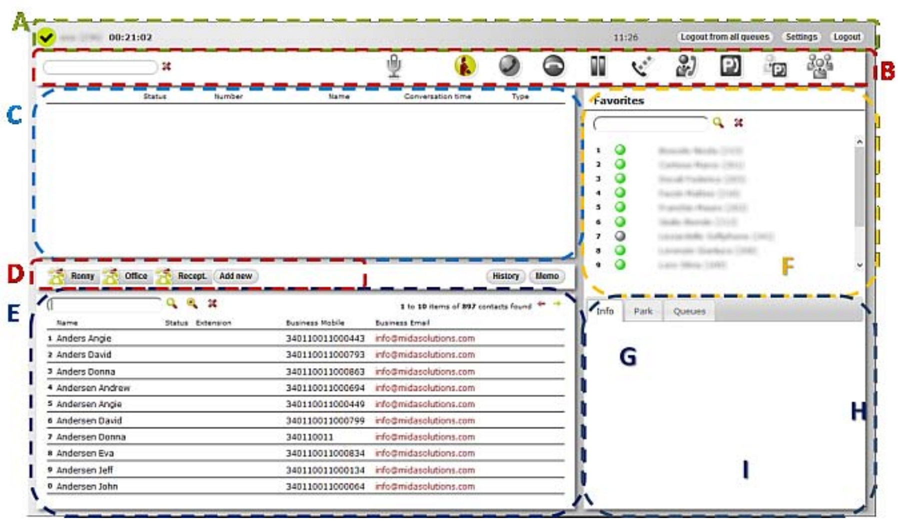
- Mouse and keyboard based call management including call, answer, hang-up, hold/resume call, direct transfer, call park (if available), camp on (smart-park; if available), and conference call.
- Multiple call handling limitations set by the controlled deskphone, the PBX settings and/or the workstation configuration (standard PCs can handle up to 6 voice calls).
- Agents have full access to a centralized corporate directory and they can search through all contacts using a “Google like” search option. Internal users are also displayed with their presence or BLF status, if applicable.
- The most used directory contact numbers can be configured as speed dials, dedicated buttons providing fast number dialling options for the agent.
- Users can also access the call history, listing all placed, received, and lost calls.

- A dial pad is available if needed, for when agents have to send DTMF tones to interactive voice responders.
- Any directory contact or any call can be managed later on due to unpredictable situations, for this reason the application offers the possibility to create a memo, bind it to a given call or contact and in case activate an alert.
- Presence
- Mute/unmute (available in soft-mode only).
- The GUI layout is simple and intuitive and all different functions are located in separate areas, thus simplifying usage.

KBS Call Center Agent Console Configuration

The KCC Agent Console has 10 macro-areas for accessing the functionality.

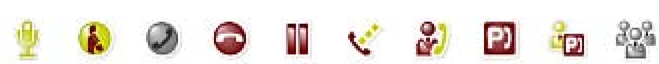
Agent Console components



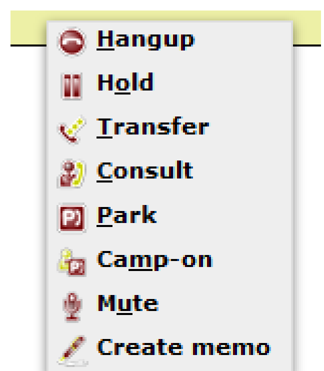
KCC Agent Console component description

Section	Name	Description
A	Status bar	The main bar is located at the top of the console, providing some useful information and common functionality (such as Logged on Agent , presence status, logout button). On the left, there is the following information: • 

KCC Agent Console component description (cont'd)

Section	Name	Description
		Ready/not ready status - operative status is Ready. If for any reason, Agent s need to leave the console for a moment, they can change the status to Not ready, without completely logging out from the queues. This means the system will still consider them as logged, but will not forward queue calls to the “not ready” Agent . After call work (ACW)- This status (activated when a queue call is completed and hung up) works as the Not ready option, allowing users to do the activities required by the finished call. • Username of the logged Agent . • Number of logged Agent . • Time from the last status change. On the right, there are some buttons and general service information:  • Time • Login/logout from all queues • Settings button • Logout button (exit console)
B	Phone control bar	The phone control section provides all the buttons for call handling: the phone actions (for example answering, hanging) can be performed either using these dedicated buttons or by using short keys.  The icon buttons reflect the call management actions available. To see the button description in the GUI you can hover over the icon. On the left side, there is also a text field to enter the phone numbers to be dialed: you can type them in directly from the keyboard or by clicking the pop-up phone keypad. In this section, you can also enable or disable the sending of DTMF tones (needed for example in some calls for browsing IVR trees or for inserting pin codes). For more information on the transfer and camp-on features, see “Transferring a call” (page 17) and “Initiating the Camp-on feature” (page 18).

KCC Agent Console component description (cont'd)

Section	Name	Description
C	Call bar	The call status bar contains the list of all the calls related to the specific phone. The following information is provided for each call: • Identification number of the call • Phone number of the Agent managing the call • Call status (waiting, conversation) • Phone number of the calling/called party • Name of the calling/called party • Call duration (waiting time or conversation time, depending on the call status) • Call type (incoming or outgoing) By selecting a call with the mouse and “right-clicking” on it, a drop-down menu will pop-up, allowing the same actions available in the Phone Control bar (for example answer, transfer) to be performed and to create a memo for the selected call. 
D	Speed dial bar	The Agent s can create and use some shortcut keys to call favorite contacts; the system provides a section for the quick selection of favorite numbers. Favorite contacts are stored in the central system. They are available to users regardless of which PC they use to login.  For more information on configuring speed dials, see “Configuring speed dial” (page 19). *Note:* To view the settings of the configured speed dials, hover over the icon and a tooltip will pop up, providing information about the number and the configured shortcut.

KCC Agent Console component description (cont'd)

Section	Name	Description
E	Directory	To help daily operations, the system can also use corporate and personal directories to perform quick searches on content. The system will check the fields flagged in the **Contact settings** page (**Administrator>Contacts>Configuration** in the system portal). Default fields are Last name, First Name, Display Name, Office, Company, and Department. **Attention** The research type is “Google-like” and returns as results all the contacts containing the search string in one of their information fields (for example searching dre, it will appear both Andrew White but also Kevin Green of Address Company). If configured by the system administrators, you can use “%”, “*” and “#” as wildcard characters. You can scroll through the search results using the appropriate arrows on the top right. For each contact in the list, the system shows this information: • First and last name • Phone status • Extension (or main number) (*) • Business number (*) • Email (*) (*) The last three fields displayed are configurable: for example, you can display the company instead of the business number. To view the additional information, select the contact: the system will display any additional information in the Info area. To call a contact in the list, click on the phone number listed. You can also send an email: by clicking on the desired contact email address, the system will automatically open the default e-mail client. The system also provides a context menu. Select the contact and right-click to view different actions for the selected contact, including: • Call • Create a speed dial for • Create memo • Add contact to favorites • Search similar contacts To add a new contact from the directory area, see “Creating, editing, or deleting a new contact” (page 20).

KCC Agent Console component description (cont'd)

Section	Name	Description
F	Favorites	The section at the top right side contains the list of the contacts set as favorites, with their phone numbers and Presence statuses. The possible status values are: • Available (Green) • Busy (Red) • Unknown (Gray) When you right-click a contact you are given the option to call that extension or delete it from your favorites. For information on adding contacts to your favorites list, see “Adding a contact to the favorites bar” (page 21). ***Note:*** This area is only available if the presence service is configured.
G	Info Area	The Info area presents all the information related to a contact, including those data generally not shown in the Directory area. The following actions are available: • Call the number– click the phone number and the system fills the dial box with the selected number. • Send the email – click the email address and the system opens the user’s default email client. • Go to Website – click the webpage address and the system opens the URL using the default web browser.
H	Park Area (if available)	**Attention** This tab and relative features are available only if park features are configured in the system. From the Park tab, you can view all the parked calls (by any Agent s) and retrieve them from the park. For each call, the system shows the most significant data (useful to identify the call) in order, the parked part, the parking part (who parked the call) and, if it has been camped and by whom. On the right, it shows how long the call was parked. At any time, Agent s can resume the parked call by a left-click on the desired call, right-click and select **Get Call From Park**.
I	Queue Area	Agent s can check their status in the queue/s directly from the console, using the Queues tab in the bottom right corner.

KCC Agent Console component description (cont'd)

Section	Name	Description
		The available statuses are: • Gray = not logged in • Green = logged in • Red = Calls/Agent s rate is higher than set. Using a threshold configured by system administrators, the system shows if there are too many calls per Agent . From the Queues tab, you can log in/log out from the queue in the following ways: • Left-click the queue. • Right-click the queue and select login or logout. You can login/logout from all the queues at once by clicking **Login (or logout) from all queues** on the Status Bar (B). The menu has the following options: • Login/logout – for Agent s to log in and out of queues. • Close/open queue – to manually open or close the queue. If you are using manual mode, the **Change to automatic mode** additional function returns to automatic opening mode. This is set from the queueing system admin platform, see *Kandy Business Solutions Call Center User Guide for Administrators* (630-02990-01). • Manage Agent s – to view all the queued Agent s and force login or out using the option icon. ***Note:*** Queue supervisors have additional functionality available, for more information see *Kandy Business Solutions Call Center Supervisor Console User Guide* (630-02992-01).
Buttons		
	Settings	See “Settings tabs” (page 21).
	Call History	The call history related to the user is available through the History button (placed in the center of the main window). The popup window contains the list of placed, received, and missed calls in separate tabs; if available, the contact name, the caller, or called party number and the timestamp are provided for each call.
	Memo	Use Memo to create reminders for calls or actions to be carried out at a later time. Each reminder contains some essential information (number and contact name) and a notes field where you can enter the desired reminder. You can also schedule a pop-up memo by inserting the appropriate date and time.

KCC Agent Console component description (cont'd)

Section	Name	Description
		At the date/time entered, the system will pop up a notification to do one of the following: • Call – Directly call the phone number entered. • Edit – Edit the memo. • Snooze – Postpone the memo. • Close – Delete the memo.
	Logout	Use this button to exit the console.

Transferring a call

Agent can transfer the call they get in different ways, to best reach any Agent 's needs.

> **Attention**
> The Consult Transfer (also known as supervised transfer) functionality within the Kandy Call Center (KCC) Attendant Console soft client is not currently supported.
>
> This does not affect agents using SIP Phones - only the softphone. As an alternative to this feature, console users can use the blind transfer function or if you do need to announce the transfer, utilize the conference feature and before merging the two calls, speak to the transferring party then join the calls and drop your end.

Prerequisites

- Answer the call.

Blind transferring, dialing the destination extension number

Step	Action
1	In the phone control bar text field, dial the destination number.
2	Click **Transfer.**

--End--

Blind transfer, searching the destination in the directory

Step	Action
1	Search the directory and right-click the desired destination.

Note: Avoid clicking on the contact number or a call the will start.

Step	Action
2	In the pop-up menu, hover over **Transfer to** and then select the desired destination number to complete the blind transfer (without consulting). or Click the **Transfer** icon to complete the blind transfer (without consulting).

--End--

Conferencing a call

Use the conference functionality to introduce the call being transferred.

Procedure Steps

Step	Action
1	While on an existing call, click **Hold**.
2	Call the phone number receiving the transfer.
3	Introduce the incoming caller.
4	Select the call currently on hold in the active call window, click **Conference**.
5	Click **Hang up**.

--End--

Initiating the Camp-on feature

If the camp-on feature is enabled, use this procedure to camp-on calls.

Prerequisites

- Answer the call.

Camp-on using phone control button

Step	Action
1	Click **Camp-on**.
2	In the popup window, input the destination number and click **Dial**.

--End--

Camp-on on a directory contact

Step	Action
1	Search the directory and right-click the desired destination. *Note:* Avoid clicking on the contact number or a call the will start.
2	In the popup menu, hover over **Camp-on** and select the desired destination number.

--End--

Fast camp-on (if available)

When the Agent answers a call and does a consult transfer to a third number, the system automatically saves the consulted third number as a target for a possible camp-on.

Step	Action
1	To camp-on the received call on the consulted number, click **Camp-on**, without specifying any contact or number. *Note:* The stored number will be removed only when the received call (the one to be camped) is finished.

--End--

Configuring speed dial

Use the following procedures to add and delete speed dials.

Adding a speed dial

Step	Action
1	Click **Add new.**
2	In the Label field, enter a reference name.
3	In the Number field, enter the phone number to dial.
4	You can select an available key from the Shortcut drop-down list, see “Creating a short key” (page 20).

--End--

Creating a short key

Step	Action
1	In the directory section, search for desired contact and right-click, select **Create speed dial**.
2	Select a number from those available (extension, business mobile, business number).
3	In the configuration window, confirm or change the Label and Number provided. You can also add a shortcut.
4	Click **Save**.

--End--

Deleting a configured speed dial

Step	Action
1	Right-click on the corresponding speed dial icon and click **Delete**.

--End--

Creating, editing, or deleting a new contact

Use this procedure to create new contacts, Personal contacts, and edit/ delete them directly from the operator console.

Prerequisites

- Agent s must have Supervisor (or higher) directory authorization level (configurable from the system administration portal).
- *Note:* It is not possible to delete System contacts (contacts uploaded by the system administrators or by the Import Manager directly from the web portal). Agent s with user level cannot create or edit or delete System Contacts from the console.

Procedure Steps

Step	Action
1	On the top of the directory area, click the **Create new contact** icon.
2	Complete the associated contact information in the popup.
3	To include the contact in the personal directory, once all the details are inserted, click **Save**.
4	The edit and delete buttons are now active to make changes to the new contact.

Note: If the Agent with supervisor directory level is a supervisor of one or more contact groups, the system will allow the supervisor to decide to set the new contact as personal or group contact, selecting the group using the dropdown menu. This option is available directly from the edit contact page.

--End--

Adding a contact to the favorites bar

Use this procedure to add an internal contact to the favorites list.

Procedure Steps

Step	Action
1	In the directory section, search for desired contact and right-click, select **Add contact to Favorites**.

--End--

Settings tabs

The KBSAgent Console enables Agent s to change some configuration directly from the console, by clicking the Settings button on the top right.

When you click Settings, the popup will provide the following tabs:

- Options – setting for operating options.
- Shortcut – configuration of the keyboard shortcuts (short keys). You can change them at any time directly from the Shortcut tab in the console settings.

  Note: Some key bindings could conflict with your browser default settings.
- Directory – In this section, you can configure three fields (in addition to first/last name and state) to be shown in the list of directory search results.
- Appearance – The Appearance tab is used to set a different layout for the web console; you can change both colors and size/font for the background, the text, and the buttons.

Field description

Tab	Field	Description
Options	Screen size	Select the desired client window size according to your monitor.
	Enable low vision mode	Flag is you require low vision mode.

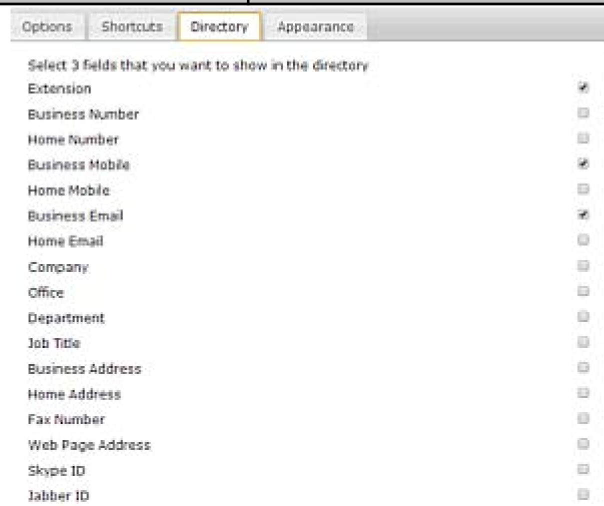
Field description (cont'd)

Tab	Field	Description
	Calls in queue options	Select whether you would like to show or hide the calls in queue.
	Show sidebar	Flag if you would like to show the sidebar (favorites, presence, info).
	Show favorites as a tab	Flag to have your favorite contacts appear in a tab next to the info tab.
	Send DTMF	Enable/disable automatic flag for sending DTMF tone.
	Call control bar height	Set Call control bar height.
	Call control bar width	Set Call control bar width.
	Enable queue info area	Enable to show queue info in the Phone Control Bar (B).
	Enable audio notification for new incoming call	Enable/disable an audio prompt that notifies of a new incoming call.
	Use memo reminder audio prompt	Enable/disable an audio prompt that notifies a memo Field popup.
	Call popup URL	If properly set, allows opening an external URL using the default browser for any incoming call (useful for integration with external databases such as CRM).
	Do automatic login on all queues when you enter	Flag if you require this functionality.
	Do automatic logout from all queues when you exit	Flag if you require this functionality.

Field description (cont'd)

Tab	Field	Description
Shortcut	LOGOUT: **F4** CALL: **F5** ANSWER: **F7** HANGUP: **F6** HOLD/RESUME: **F8** TRANSFER: **F11** CONSULT: **F10** PARK: **F12** CAMP-ON: **F9** CONFERENCE: **CTRL+C** SWITCH BETWEEN CALLS INVOLVED IN A TRANSFER: **CTRL+S** LOGIN/LOGOUT ON ALL QUEUES: **F2** NEW CONTACT CREATION: **ALT+N** CONTACT SEARCH: **CTRL+F** SIMILAR CONTACTS SEARCH: **SHIFT+M** CONTACT ADVANCED SEARCH: **ALT+Q** PRESENCE SEARCH: **ALT+P** DIALBOX SELECTION: **CTRL+D** MUTE/UNMUTE AUDIO: **CTRL+M** INFO TAB: **SHIFT+I** PARK TAB: **SHIFT+P** QUEUES TAB: **SHIFT+Q** QUEUES SUMMARY MESSAGE: **F3** CREATE/DELETE FAVORITE: **CTRL+Y** CREATE/DELETE SPEED DIALS: **CTRL+K** HELP PAGE: **CTRL+H** CALL SELECTION: **CTRL+[0-9]** CONTACT SELECTION: **ALT+[0-9]** PRESENCE CONTACT SELECTION: **ALT+CTRL+[0-9]** SPEED DIALS: **SHIFT+[F1-F12]** *Note:* To get a rapid list of all the configured shortcuts, use Ctrl+H to open the system help page.	
Directory	Below are the fields that can be displayed in the directory section (for example phone numbers and email addresses). We suggest choosing the most frequently used fields (for example business or mobile number), leaving the visualization of other information in the info tab.	

Field description (cont'd)

Tab	Field	Description
	 *Note:* All the contact information is available in the Info tab	
Appearance	Application background	Select an application background from the drop-down list or flag the checkbox to use the default.
	Panels background	Select a Panels background from the drop-down list or flag the checkbox to use the default.
	Text color	Input the hex color code for the text color, or flag the checkbox to use the default.
	Text font family	Select the font style from the drop-down list or flag the checkbox to use the default.
	Text size	Input the percentage of size for the text or flag the checkbox to use the default.
	Buttons text size	Input the text button size (px) or flag the checkbox to use the default.
	Buttons background color	Input the button background color or flag the checkbox to use the default.
	Selection color	Input the hex color code for the selection color or flag the checkbox to use the default.
	Links color	Input the links color or flag the checkbox to use the default.

Appendix A: CRM integration

The KBS Agent Console can dynamically open a URL when there is an incoming call.

The URL is configurable and can be opened automatically in the following scenarios:

- When an incoming call is detected (alerting).
- When the incoming call is answered (connect).

The URL can include dynamic data collected directly from the call, or indirectly from the contact information related to the calling number (CLID). This option can be used for 3rd party integrations, for example Customer Relationship Management (CRM) systems.

Incoming call signaling data collected

Operator	<<AGENTID>>	Directly collected from the KBS Agent Console application
Caller number	<<CLID>>	If available and not masked by the network
Caller name	<<CLIDNAME>>	If available. It is the SIP alerting name
Called number	<<CALLEDNUM>>	Number of the agent phone line

If some tags are empty, the system fills them up using a default string that can be defined in the configuration panel; by default, the system provides an empty value. Directory data can be populated by operators directly from the Console or by administrators and Supervisors using the configuration portal.

Example

Integration with Salesforce

In Salesforce you can define custom links to provide quick access to relevant or frequently-used Salesforce pages. Custom links can be used to integrate Salesforce CRM with KBS Agent Console.

Relevant customer ID or query information shall be stored in Ribbon directory database.

For applicable Salesforce documentation, go to https://help.salesforce.com/home.

Example

Integration with Microsoft Dynamics

Microsoft Dynamics CRM provides URL addressable elements, that can be then opened pointing to their related URL

Relevant customer ID or query information shall be stored in Ribbon directory database.

For applicable Microsoft documentation, go to https://msdn.microsoft.com/en-us/library/gg328483.aspx .

Example

Possible CRM integrations

Any CRM or third party system with a web interface can be integrated using the method suggested, therefore consider these notes as just basic examples

Some interesting cases are:

- Zoho :

  https://www.zoho.com/creator/help/url-pattern/functionality-based-urls.html

- Sugar CRM:

  https://community.sugarcrm.com/sugarcrm/topics/how-to-pass-filter-parameters-via-url-to-a-list-view-in-sugarcrm-7-2