Kandy Business Solutions

Live Support Agent Console User Guide

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For access to the technical documentation, log in through the Ribbon Support Services website at https://ribboncommunications.com/services/support-services/technical-documentation.

Contents

What's new for Live Support Users in Kandy Business Solutions version 47.3

Kandy Business Solutions (KBS) 47.3 includes new, changed, and deprecated features.

Revision 01.06

September 3, 2020. KBS 47.3.

New sections

The following sections have been added:

- “Pausing Call Recording” (page 18)
- “Integrating Salesforce” (page 19)
- “Co-browse” (page 20)

Revision 01.05

February 25, 2019. KBS 42.3

Term Changes

The following terms have been changed throughout the UI and the documents:

- Real time statistics — statistics
- Canned messages — predefined messages
- Call escalation — connect customer
- Customer connect — connect customer
- Menu item — directory item

Revision 01.04

January 30, 2019. KBS 42.3.

Format updates

Added job aids for clarification.

Revision 01.03

January 4, 2019. KBS 42.2.

Call functionality

New inbound and outbound call procedures have been added.

Password change

A new password change procedure has been added.

Revision 01.02

May 9, 2018. KBS 2.0.

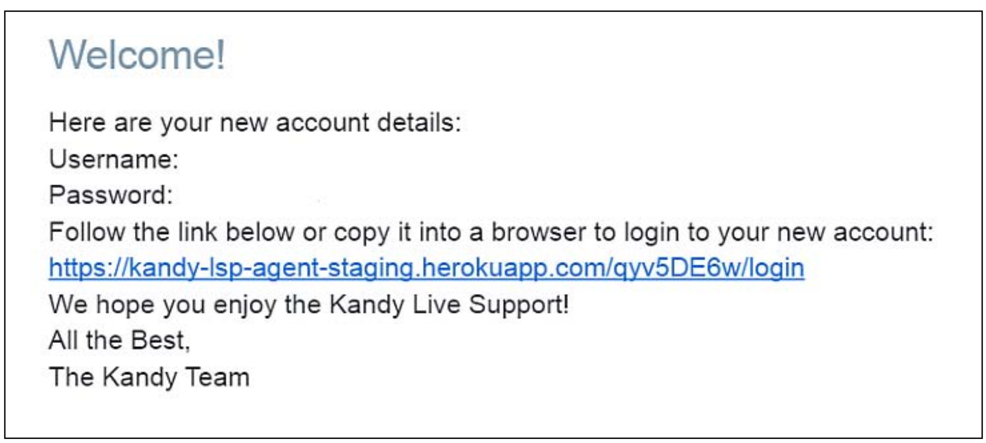
Ribbon rebranding

The company name has been changed to Ribbon.

Live Support Agent Console Overview

The Live Support Agent Console is used for chat, voice, and video sessions with clients who initiate sessions from the Live Support client interface embedded in websites. As an agent, you log in and wait for session requests to come in and appear in the chat, voice, or video queues.

Agents are added by Live Support Admin Portal users. This is a separate interface for administrators covered in *Kandy Business Solutions Live Support Admin Portal User Guide* (630-03414-01). If the Admin inputs the agent's email address, the agent will receive an email with the agent console link and login credentials.

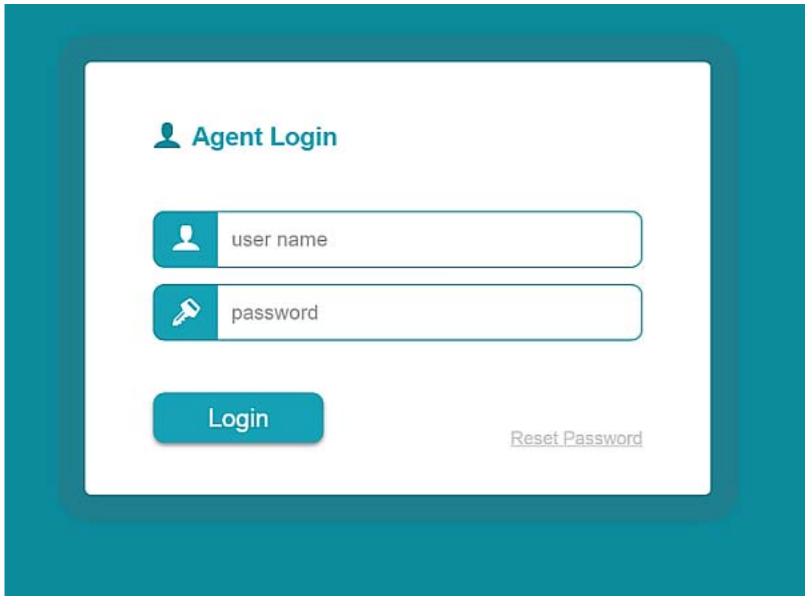

Welcome!

Here are your new account details:
Username:
Password:
Follow the link below or copy it into a browser to login to your new account:
https://kandy-lsp-agent-staging.herokuapp.com/qyv5DE6w/login
We hope you enjoy the Kandy Live Support!
All the Best,
The Kandy Team

The agent console link is unique for each company set up within the admin portal. If an agent clicks on the agent console link while logged in as another agent using the same browser, the previously logged in agent will remain logged in.

Navigate to the correct URL and log into the agent console by providing a Username and Password.

Login screen



Note: If username or password is lost, click **Reset Password**. A password will be sent to your email address.

Use Chrome web browser on a PC or a Laptop, to support WebRTC. The Chrome plugin will be necessary for screen sharing.

Changing your password through the KBS portal

As an agent, use this procedure to change your password through the KBS portal.

Procedure Steps

Step	Action
1	In your browser, navigate to https://eup-ucc.genband.com.
2	To access the portal, use the username supplied by your Administrator and your agent console password. *Note:* Your agent KBS portal username is your agent console username plus your KBS domain, as in username@kbsdomain.
3	From the KBS portal homepage, to the right, click the agent name, and select **Change password.**
4	Enter the old password, the new password, and the new password again.
5	Click **Change**.

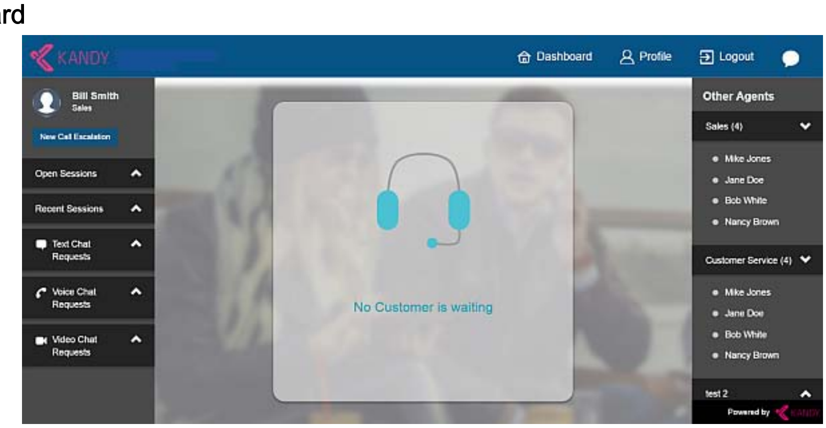
--End--

Agent Dashboard

After you log in to the Agent console, you are directed to the Agent dashboard.

Your name appears in the upper-left corner along with your assigned departments. Other agents assigned to these departments appear on the right, from where the agent can initiate agent-to-agent chat sessions. If you require training or support those options are located to the right of the **Dashboard.**

Agent dashboard



Editing an agent profile

From the **Profile page**, you can change your name, password, choose your department, and select incoming session notifications.

Procedure Steps

Step	Action
1	From the **Dashboard**, from the top menu, click **Profile**.
2	Under **Agent profile**, make the changes you want. • To receive a visual alert in the bottom right of your screen when you receive an incoming session, select **Show notifications**. • To receive an auditory alert when you receive an incoming session in any queue, select **Notifications sound**.
3	Click **Save**.

--End--

Adding a predefined message

You can add predefined messages into chat sessions by clicking an icon in the agent chat window. Use these messages when agents are busy, and customers are waiting in a queue.

Procedure Steps

Step	Action
1	From the **Dashboard**, from the top menu, click **Profile**.
2	Click **Predefined messages**.
3	Click **New predefined message**. *The New predefined message window opens.*
4	Enter the message you want to add, and then click **Add message**.

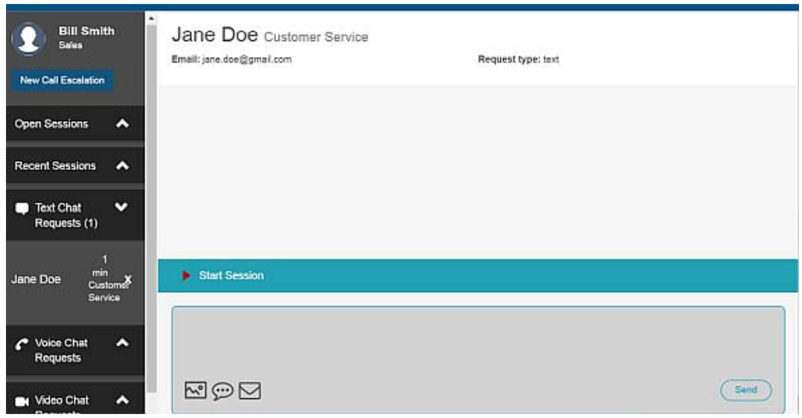
--End--

Starting a text session

Follow these steps to start a text session when a user sends you a text chat request.

> *Note:* Depending on the settings set by the agent on the profile page, the incoming session may be accompanied by an audio and visual popup.

Text chat window



Procedure Steps

Step	Action
1	From the **Dashboard**, on the left menu, under expanded **Text chat requests**, choose the chat session you want to start, and then click **Start session**.
2	In the chat window select 1 of the following options: • Enter your messages to the user in the text box and click **Send**. • To add an image (PNG, JPEG, or GIF), click the Image icon. • To add a predefined message, click the message Speech Bubble icon and choose the message you want. • To send a transcript of the chat session by email, click the Envelope icon. Enter the email address and click **Send**.
3	To end the session, click **End session**. *Note:* To click between your current open sessions (maximum of 10), in the left menu select **Open sessions**.

--End--

Upgrading to a Voice or Video session

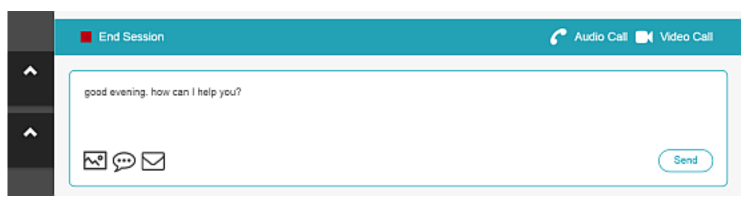
To upgrade to a voice or video session to clarify something for the customer, follow these steps.

Procedure Steps

Step	Action
1	From a current chat session, click **Audio call** or **Video call**, see “Audio call and Video call buttons” (page 14).
2	To move the agent-view over to the main text chat window, select **Expand video**.
3	For the user to share their video, they need to select the Camera icon and **Start local video**. As an agent, you’ll see the user’s webcam video as the larger square and your webcam video as the smaller square.
4	On the agent side, the agent will see the large image of the user and a small image of themselves.
5	To minimize the video and view the text section, click **Shrink video**.

--End--

Audio call and Video call buttons



Sharing a screen

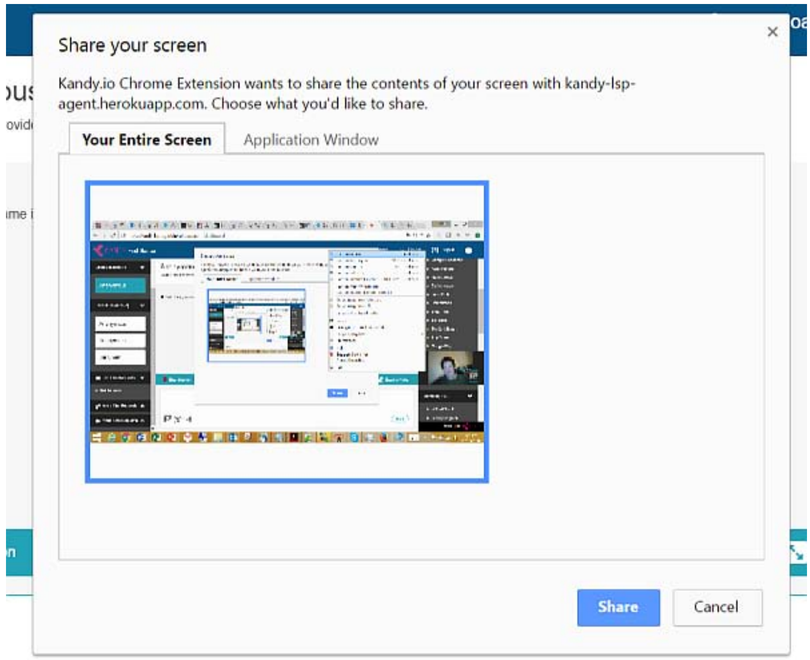
Follow these steps to share your screen with the user.

Procedure Steps

Step	Action
1	From the chat text session, click **Start share**.
2	Under **Share your screen**, choose to share **Your entire screen** or just your **Application** window, and then click **Share** (see “Screen share options” (page 15)).
3	To stop sharing your screen or application, click **Stop share**.
4	To end the call, click **End call**.
5	To end the session, click **End session**.

--End--

Screen share options



Escalating a text session

Follow these steps to email a session link to customers that don't go through the queue system.

Procedure Steps

Step	Action
1	From the **Dashboard**, to the left, under your username and profile picture, click **Connect a customer** and complete the fields. • **Customer name**—Enter a customer name. • **Customer email**—Enter a customer email address. • **Type of connect**—Select the session type. • **Department**—Select the department. • **Mute call**—Choose Yes or No.
2	Click **Connect.**

--End--

Receiving a voice call

Follow these steps to receive a voice call from a smartphone, mobile phone, or landline.

Procedure Steps

Step	Action
1	From the **Dashboard**, under expanded **Voice chat requests**, choose the chat session you want to start and click **Audio call**.
2	To end the voice call, click **End call**.
3	To end the session, click **End session**.

--End--

Escalating a voice session

Follow these steps to escalate a call to enable chat, document and screen sharing, or video call.

Procedure Steps

Step	Action
1	On the **Dashboard**, from the **Audio call** session, to the right, click **Escalate**.
2	Under **Connect a customer**, complete the fields. • **Customer name**—Enter a customer name. • **Mode of connect**—Choose Email or SMS. • **Customer email**—Enter a customer email address.
3	Click **Connect**.
4	To start a video call, click **Video call**.
5	To start a screen share, click **Start share**.

--End--

Making an outbound voice call

If you've been given the ability to make an outbound call by your Administrator, follow these steps to make an outbound call.

> *Note:* If you don't have outbound call options, contact your administrator for permissions.

Procedure Steps

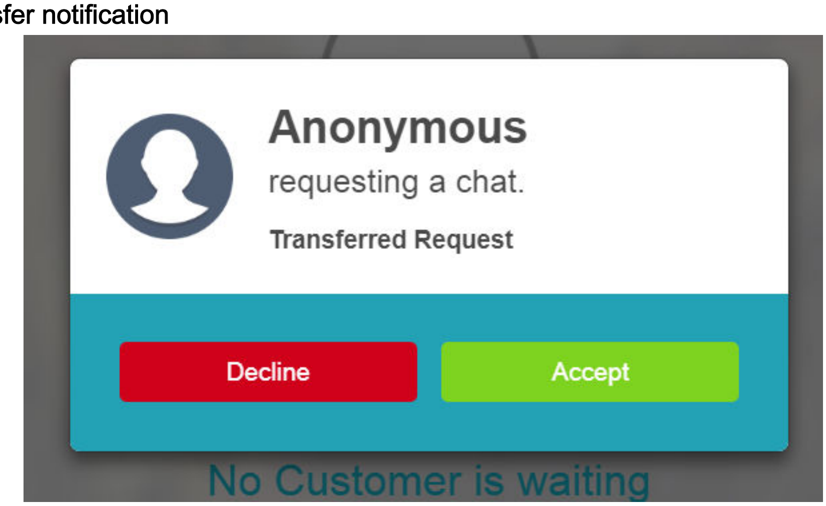
Step	Action
1	From the **Dashboard**, to the left, below **Connect a customer**, click **Outbound call**.
2	Under **Outbound call**, enter the phone number into the dial pad and click **Connect**.
3	Under the chat session, click **Audio call**.
4	To end the call, click **End call**.
5	To end the session, click **End session**.

--End--

Transferring a chat session

Follow these steps to transfer a chat session to agents, departments, or PSTNs.The agent receiving transfer will also receive a popup indicating an incoming chat session. They can agent accept or decline the transfer. If they accept the session then that agent will be in a regular chat session with the user, able to escalate to voice or video as usual. Any chat session that was conducted between the first agent and the user is see in the second agent's screen so he or she has context of the session. This is a cold hand-off. The receiving agent can accept or decline the call, and can't communicate with the sending agent accept they could chat beforehand using the chat functionality on the right side of the agent portal.

Transfer notification



Note: Outbound calls can't be transferred.

Procedure Steps

Step	Action
1	From the Dashboard, in a current chat session, to the right, click **Transfer session**. *The Transfer session window appears.*
2	Under **Type of transfer**, select one of the following options: • **Transfer to a department**, select the department, and then click **Transfer**. When the call is transferred, you receive a **Transfer successful** message. • **Transfer session**, under **Type of transfer**, select **Transfer to an agent**, select the agent, and click **Transfer**. When the agent accepts the transfer request, you receive a **Transfer successful** message. • **Remote number**, enter the phone number into the dial pad and click **Transfer**. When the call is transferred, you receive a **Transfer successful** message.

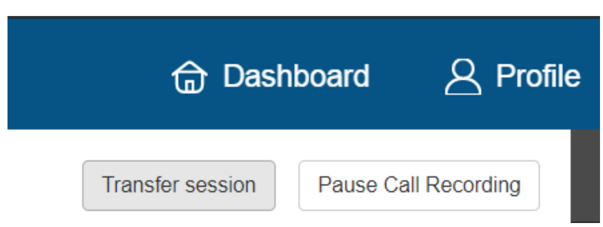
--End--

Pausing Call Recording

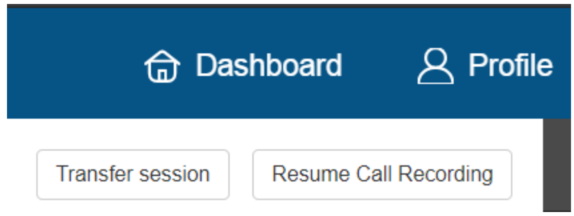
If an agent has been enabled with call recording then all the agent's voice calls will be recorded by default. This includes all inbound PSTN calls, voice WebRTC calls, and voice portions of WebRTC video calls. An agent can choose to pause a call recording if the customer is going to mention a credit card number, social security, or other sensitive information.

Procedure Steps

Step	Action
1	While in an active voice call, to stop or pause a call recording, click **Pause Call Recording**.



Step	Action
2	To resume recording the call, click **Resume Call Recording**.



Note: If the “Pause Call Recording” button doesn’t appear for the agent during an inbound PSTN call or voice or video WebRTC call, then either the agent has not been set up with call recording, or the call recording feature has been turned off for the agent in the Live Support admin portal.

--End--

Integrating Salesforce

Salesforce Integration pulls data from the Salesforce contact detail record into the Live Support agent portal, displaying various data above the chat section. The unique identifier in Salesforce to bring up the contact details record is passed through to Salesforce. This context field can be any field, including email, account number, and the most commonly be the phone number.

Prerequisites

- To click directly into a Salesforce detail record from the Agent Portal, you must log into Salesforce before you begin in the same browser as the Agent Portal session.

Procedure Steps

Step	Action
1	Initiate a session. *The context field engages the Salesforce API and displays the data in Live Support.*
2	Click the tab headings to view the whole tab (e.g. Contact, Cases, Opportunities, Campaign history, or Notes).

Sample data from Salesforce

3 Click the sub-headings to be taken directly to the subsequent screen within Salesforce (e.g. Name, Account, Phone).

4 To hide and view Salesforce section, click **Hide Salesforce Contact**.

--End--

Co-browse

Co-browse enables the agent and the user to view the same web page at the same time and see each other's cursors movements, page changes, and form inputs. The user and the agent will only be able to conduct co-browsing sessions on pages that have been previously set up to allow such sessions. If the user navigates to a page or web site that has not been set up for co-browsing sessions, the agent will no longer see the pages to which the user has navigated. If the user returns to a page that has been set up for co-browsing, the agent will start seeing the user pages and movements again.

If a user starts a session (chat, voice, or video) session with the agent, the agent will see a "Start co-browse" button on the upper right portion of the agent portal. If the agent and user discuss adding a co-browsing session, and decide to have one, the agent should press this button.

As soon as the agent clicks **Start co-browse** the web page the user is on appears over the agent portal screen, completely covering it with the web page the user is viewing. If there are any aspect ratio mismatches between the user browser screen and the agent browser screen, the agent screen will either show extra white space on the right or not show the entirety of the user web page. For example, if the user makes their browser half the width of their screen, then the agent will suddenly see a large white space on the right side. When the agent or user moves their cursor on the web page, the other will see this cursor on their version of the web page as a black cursor with an aquamarine background.

The user or agent can navigate up and down their version of the web page and the other will see their version of the web page change. If one of them clicks on a menu, the other will see it on their screen. If one clicks on a link and navigates to another page, then the other will be taken to the new page on their version. However, this will only occur if the web page that they click to also has the Live Support embed code and additional co-browse specific line of JavaScript.

If the user or agent starts filling out a web form, the other will see the data entered into the field. The exception to this is if you want to block certain sensitive fields from the agent's view such as credit card information or social security numbers. The agent will not see the field on their version of the web page, but the user will, though the agent should see the name of the field.

During the co-browsing session, the agent can return to the Live Support agent portal screen to text with the user or see the one- or two-way video (if they are on a video session). The user would see the texting and video on the Live Support popup, like normal. If the agent wants to return to the co-browse session, the agent clicks Show co-browse on the upper right of the agent portal.

Once the agent and user have completed their co-browsing session, the agent can end the co-browsing session by clicking the Stop co-browse link at the bottom right of the screen where the agent is seeing the co-browse session. The agent can restart co-browsing by clicking Start co-browse in the upper right corner of the agent portal.