



# Consilium Unified Agent Desktop™ for Banking Onboarding Guide

*One desktop. Smarter customer operations.*

Prepared for: Customer Onboarding Teams

# Table of Contents

## Contents

1. Introduction.....	3
2. What is Consilium UAD for Banking .....	3
3. Who Uses UAD (Modules & Roles).....	3
4. Key Features .....	3
5. Onboarding Pre-requisites (Day-0).....	3
6. Day-0 Setup: Self Onboarding .....	4
7. User Access & Login.....	5
8. Workspace Configuration (Widgets & Layouts) .....	5
9. Integrations (CRM & Optional Capabilities) .....	5
10. Go-Live Validation Checklist .....	6
11. Troubleshooting .....	6
12. Support & Escalation .....	6

## 1. Introduction

This guide helps customers onboard Consilium Unified Agent Desktop™ (UAD) for Banking with a Webex Contact Center (WxCC) tenant. Consilium UAD is delivered as Software-as-a-Service (SaaS), allowing customers to onboard quickly by completing a lightweight Day-0 configuration.

## 2. What is Consilium UAD for Banking

Consilium Unified Agent Desktop™ for Banking is a modern desktop experience built to unify customer interactions across voice and digital channels. It reduces tool switching, improves agent productivity, and enables supervisors to monitor and coach in real time—while supporting enterprise-grade scalability.

The solution integrates with core banking platforms and financial CRMs to provide instant access to customer profiles, account details, interaction history, and product holdings, enabling agents to personalize every conversation and reduce handling time. Role-based workspaces and banking-specific templates help agents support use cases such as customer onboarding, KYC verification, loan servicing, credit card management, collections, and wealth advisory scheduling.

## 3. Who Uses UAD (Modules & Roles)

UAD includes role-based modules that align with contact center responsibilities:

- Agent Module — Handle customer conversations and wrap-up from one workspace.
- Supervisor Module — Monitor queues, coach agents, and drive performance outcomes.
- Admin Module — Configure tenants, integrations, layouts, and access policies.

## 4. Key Features

- Unified Omnichannel Hub — Voice and digital interactions in a single interface to eliminate swivel-chair operations.
- Deep CRM Integration — Instant screen pops and bi-directional activity syncing to support real-time personalization.
- Customizable Widget Workspace — Drag-and-drop, role-based layouts to match team workflows.
- Real-Time Supervision — Live monitoring, real-time quality scoring support, and whisper coaching capabilities.
- 360° Interaction History — A searchable timeline of customer touchpoints for informed follow-ups.
- Cloud-Native Scalability — Secure, high-performance deployment across global and remote environments.
- AI-Assisted Intelligence — Contextual insights and guidance while keeping people in control.

## 5. Onboarding Pre-requisites (Day-0)

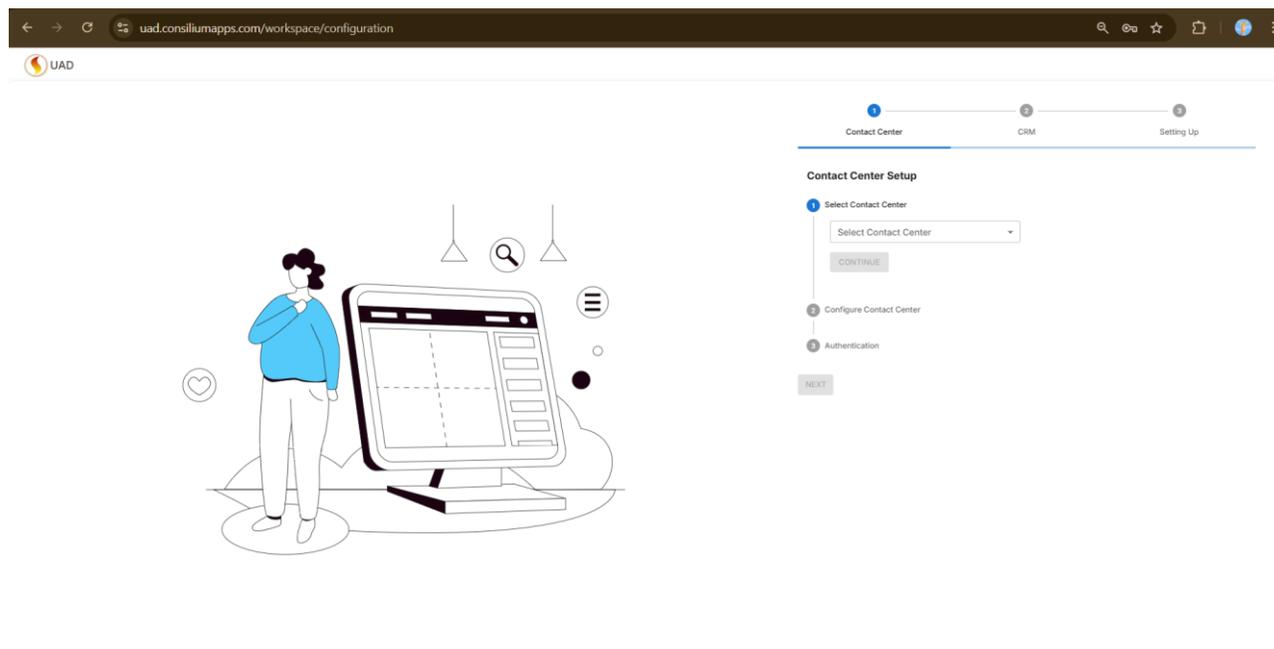
To onboard Consilium UAD on Day-0, the customer must have the following:

Item	Required	Notes
Webex Contact Center (WxCC) Tenant	Yes	Active tenant with access for agents, supervisors, and admins.
Organization ID (OrgId)	Yes	Used to identify the customer organization in WxCC APIs.
WxCC API Base URL	Yes	Region-specific API URL for the WxCC tenant.

Optional items (recommended based on rollout scope):

- CRM endpoint(s) and credentials (Salesforce, ServiceNow, or custom)
- SSO requirements (if the customer mandates SAML/OIDC)
- Widget and role mapping (which widgets are visible per role)
- Wrap-up disposition mapping and reporting preferences

## 6. Day-0 Setup: Self Onboarding



Because UAD is SaaS, customers can onboard themselves by entering a minimal set of configuration values. This enables rapid Day-0 activation without heavy infrastructure work.

### 6.1 Collect required values

Before configuration, confirm you have:

- [ ] OrgId
- [ ] WxCC API Base URL

### 6.2 Configure tenant settings in UAD Admin

- 1) Log in to UAD with an Admin user.
- 2) Open Admin Module → Tenant Settings (or equivalent configuration screen).
- 3) Enter the customer OrgId.
- 4) Enter the WxCC API Base URL for the tenant region.

5) Save the configuration.

## 6.3 Validate connectivity

After saving, validate that UAD can successfully connect to the WxCC tenant:

- [ ] UAD can fetch basic tenant metadata (Org validation success).
- [ ] Agent and supervisor modules load without errors.
- [ ] Voice and digital routing services show as available (where configured).

## 7. User Access & Login

UAD access is determined by user role assignment and tenant permissions. Typical access patterns include:

- Agents — Access Agent Module for handling interactions and wrap-up.
- Supervisors — Access Supervisor Module for monitoring and coaching.
- Admins — Access Admin Module for configuration and integrations.

### 7.1 Agent login considerations

If voice is enabled in the customer environment, agents typically authenticate into the WxCC voice experience and use UAD as the primary interaction workspace. Digital channels can also be presented inside the same UAD interface.

## 8. Workspace Configuration (Widgets & Layouts)

UAD provides a flexible, widget-based workspace. Supervisors or admins can compose role-based layouts using drag-and-drop configuration.

### 8.1 Recommended default widgets

- Interaction Controls (voice and digital controls)
- Customer / Contact Panel (customer context)
- CRM Screen Pop or Embedded CRM View (if enabled)
- Wrap-Up & Disposition Panel
- Interaction History / Timeline

### 8.2 Role-based layout approach

A common approach is to define layouts per role:

- Agent layout — optimized for speed and resolution (few, high-utility widgets).
- Supervisor layout — monitoring and coaching widgets prioritized.
- Admin layout — configuration panels and integration utilities.

## 9. Integrations (CRM & Optional Capabilities)

UAD supports integrations that enhance customer context and reduce after-call work.

## 9.1 CRM integration (optional)

When CRM integration is enabled, UAD can provide:

- Instant screen pop on inbound and outbound interactions
- Bi-directional syncing of interaction activity and outcomes
- Case/ticket creation and updates based on configured rules

## 9.2 AI-assisted intelligence (optional)

UAD can support agents with contextual insights and recommendations while maintaining human control over decisions and customer outcomes.

## 10. Go-Live Validation Checklist

Use this checklist to confirm readiness for production use:

- Day-0 configuration completed (OrgId and WxCC API Base URL saved)
- Admin module accessible and tenant configuration verified
- Agent module login works for a test agent
- Supervisor module access confirmed for a test supervisor
- Inbound interaction can be received and answered in UAD
- Wrap-up is completed and saved successfully
- CRM screen pop works (if enabled)
- Activity sync to CRM works (if enabled)

## 11. Troubleshooting

### 11.1 Common issues

- Tenant validation fails: Verify OrgId and ensure the WxCC API Base URL matches the tenant region.
- Modules not visible for a user: Confirm the user's role assignment and tenant permissions.
- CRM screen pop not working: Validate screen pop rules, identifiers (ANI/Contact ID), and CRM connectivity.
- Digital channels not stable: Confirm digital channel configuration and routing connectors in the tenant.

## 12. Support & Escalation

For onboarding assistance, configuration questions, or integration troubleshooting, contact your Consilium onboarding representative. Include tenant OrgId, region, and a short description of the issue along with screenshots or error messages.