QUICK START GUIDE

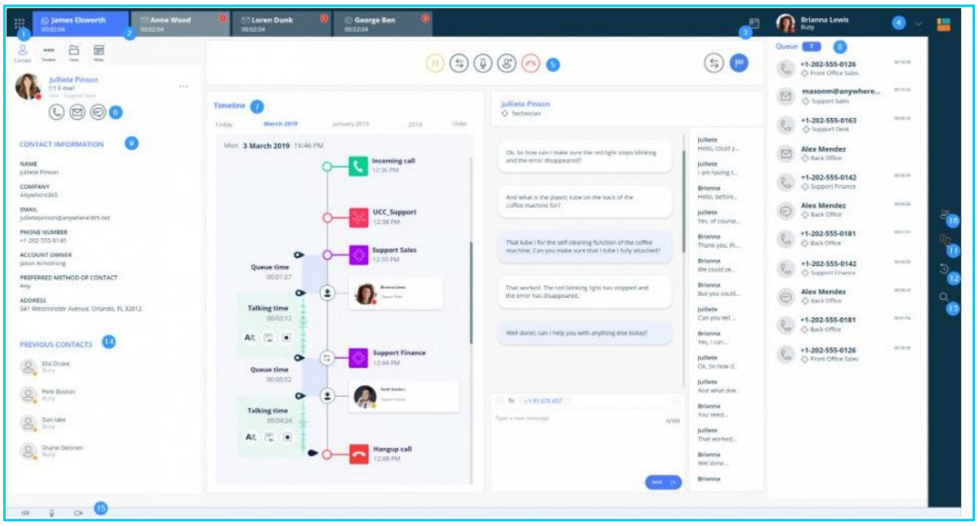
WebAgent management tools

Anywhere365 Cloud Contact Centre

Anywhere365 offers several management tools in WebAgent such as classifications, timeline, agenda or calendar, customer details and case history.

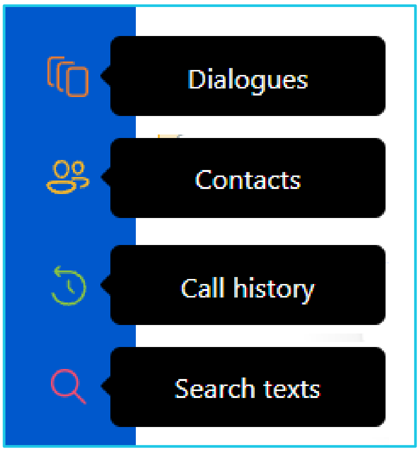
WebAgent Control panel

Depending on your company profile you may have additional functions or applications integrated with other contact management tools.



Side Bar

Use the side navigation side bar to access quick links:



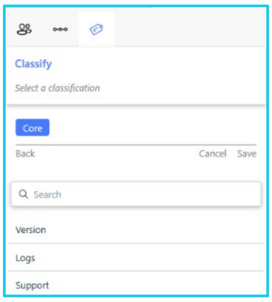
- **Dialogues –** current active calls in the queue.
  - Waiting – view calls waiting, take/answer from waiting.
  - Connected – displays your connected calls and timeline.
- **Contacts –** providing search capabilities to find contacts and initiatechats or calls to them.
- **Call History –** overview of historical call with ability to call back contact or remove them from the list.

Note: Some steps, screenshots and options may differ slightly depending on the application, browser, operating system and software version you are using.

- **Search –** when connected to the **Dialogue Manager**, you can search preview text-based conversations.

Classifications

- During a dialogue you can select a predefined classification to label or categorize the type of call.

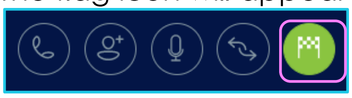


- The **Classifications** tab can be opened by clicking the **Label**/**Tag** icon.

- Select or search for the suitable category for the call, press **Submit**.

At the end of a call

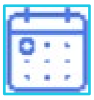
- You may be prompted to enter the classification on completion of a call.
- The flag icon will appear on the **Call Control** bar.

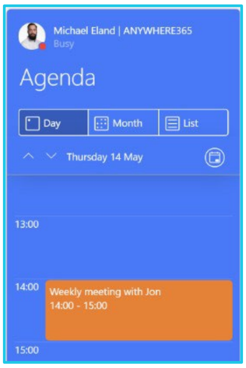


- This classification information is utilized in the **Dialogue Intelligence** reports.

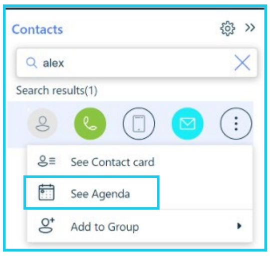
Agenda/calendar

- You may be able to integrate your personal calendar or group calendars (Agenda's) to the WebAgent Desktop.
- Click the **Calendar** icon to **Open**.



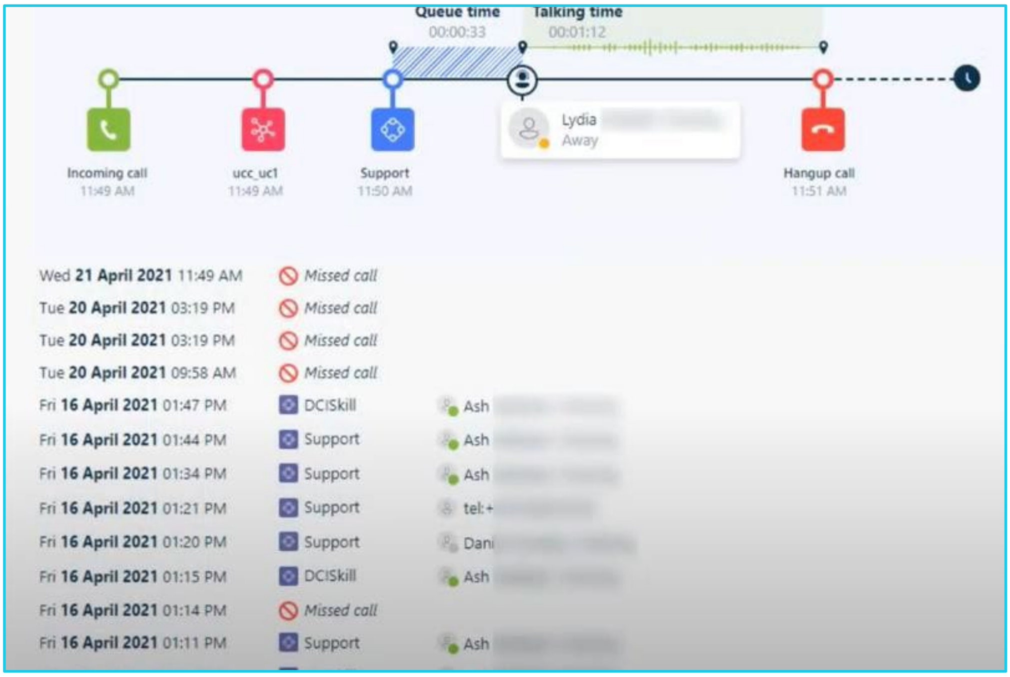


- You can also check your colleagues’ availability while transferring calls using their contact card integrated with their Teams profiles.



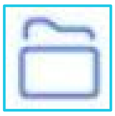
Timeline

During a call you can see a timeline for the customer contact history logs. Click on previous dates to view the timeline for specific dates.



Customer details and case history

- If the Contact Centre is integrated with a customer management database, and the Caller ID is recognised, the customer details may be populated into the WebAgent window.
- If there are any previous cases available for the customer, they can be shown by clicking on the **Case** icon.



- Depending on the CRM Service, cases for the selected contact will be loaded.
- If a URL is available, clicking on the case will open a new tab that will load your back-office application.

Note: Some steps, screenshots and options may differ slightly depending on the application, browser, operating system and software version you are using.

Learn more

- Call handling and transfer >
- WebAgent for Microsoft Dynamics 365 >

Discover more at the BT Support Centre >