WebAgent for Microsoft Dynamics 365

Anywhere365 Cloud Contact Centre

Log into Anywhere365 WebAgent, set your availability status and handle calls from Microsoft Dynamics 365.
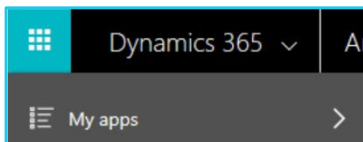
Starting Microsoft Teams

To start up Teams, click on the Teams icon. Calls are integrated with the Teams Calling softphone, your availability status within Teams is important for call handling.
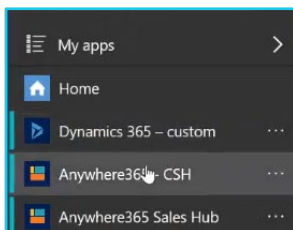
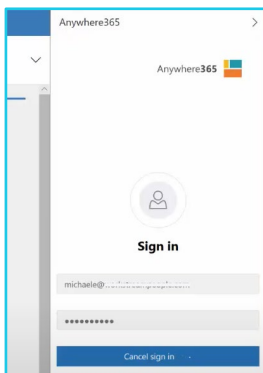### Launch the Dynamics 365 application first

1. In Dynamics 365 click on the dropdown and choose MyApps.

2. Select the App where the Anywhere365 WebAgent is configured.

3. The Anywhere365 WebAgent is now available on the right side of the screen.

4. Sign in to the WebAgent with your credentials.

5. Single sign-on or auto login options may be programmed.

Informal agent

You will be automatically logged in to the associated skills and queues programmed for you. Ensure your Teams presence status is set to available.

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

Formal agent - login to the UCC (Unified Contact Centre)

As a formal agent you will manually 'Sign In' to each of your skills or queues, then make yourself available from the Teams presence status.
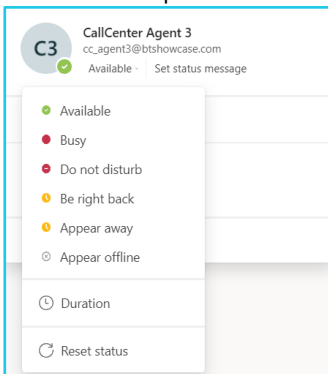
WebAgent profile

1. Click **Open your account** on the top right of screen.
2. Select **Manage Profiles**.

3. Toggle the state to sign in each skill.
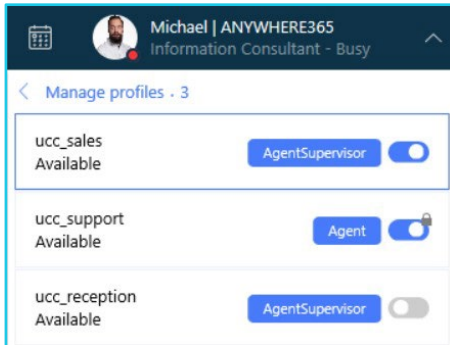
Change availability

To be able to accept calls you must manage your available status from the Teams user profile.

1. Click on your Teams user profile icon.
2. Select the presence drop-down list.

3. Select **Available** status to receive calls from the Contact Centre queues.
4. Select **Busy** to stop receiving calls when you go on a break, lunch, or a meeting.

Reason codes

When you change your availability in Teams, you also need to apply a reason code in the WebAgent profile.

1. Click on your profile icon.

2. Select the reason code you want to use.

3. Don't forget to make yourself available after your break.

Call handling

All UCC calls are integrated with the Teams calling interface, but you can manage all calls from within the Web Agent and Dynamics single browser window as best practice. You may see the Teams pop-up calling window.

Answering incoming calls

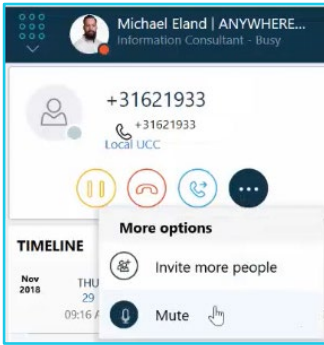Click on the Green Phone Icon in the Web Agent window.

If the caller ID is recognised the Dynamics 365 window will display the customer details and any previous interactions.
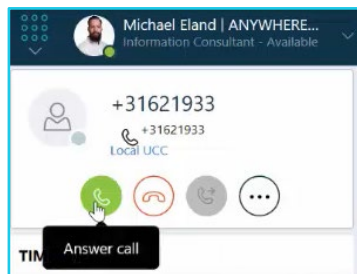
WebAgent call controls

Manage the call from the WebAgent interface, use the active call control icons.

Hold

End call

Transfer

Mute

Add participant

CRM toolbar

You can interact with the CRM database using the Web Agent toolbar at the bottom of the call window, or from your standard functionality within the Dynamics 365 application.

- If the caller ID is recognised, you will be presented with the customer profile page, view previous cases, or add a new case/activity for the existing contact.
- If multiple contacts are found, you can search to select the correct customer profile.
- If the caller ID is not recognised, you will be prompted with the create a new contact page to add a new customer profile.
- New Cases and Activities are managed from within the Dynamics application as standard.

Completing calls

- **To end the call** - when you have completed the call click the red end call icon.
- **Wrap up time** - you may have pre-defined wrap up time allocated at the end of each call.
  - Use the end timer button if you do not require the full duration.
  - Use the + icon to add additional time.
- **Classifications** – if not completed during the call you may be prompted to add a classification reason code at the end of the call.
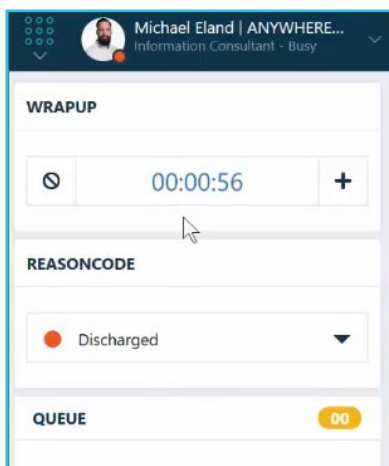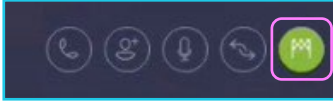
Classifications

If programmed this allows a predefined label classification to be selected to categorize the type of calls handled.

- During a call - click the label/tag icon.
- At the end of call – select the green flag icon.

- Select or search for the suitable category for the call, click **Handled** to close the call window.
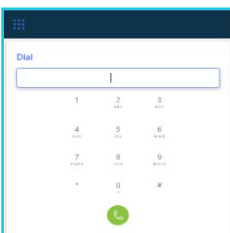
Making outbound calls

There are multiple ways to make outbound calls.

- Search for contacts or the call history log from within your Teams database.
- Use the dial pad to key in external numbers, or search for contacts already stored in the Dynamics CRM application.
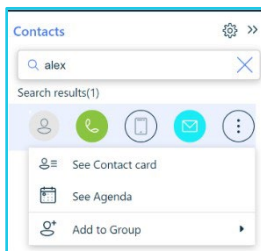

WebAgent: use the contacts field to search for a user. Use the options to chat, call, call mobile or email the contact as available. Or view their contact card, check their agenda, add to your contact list.

**Dial pad**: open the dial pad icon on top left to enter a telephone number.

Dynamics contact search: Use the contact search via the Dynamics CRM application to find your contact you want to speak to.

From the details card select their telephone number to initiate the outbound call via the Web Agent window.
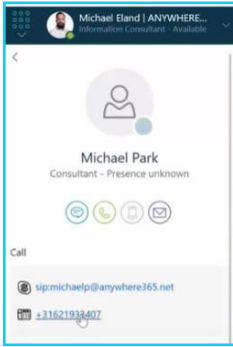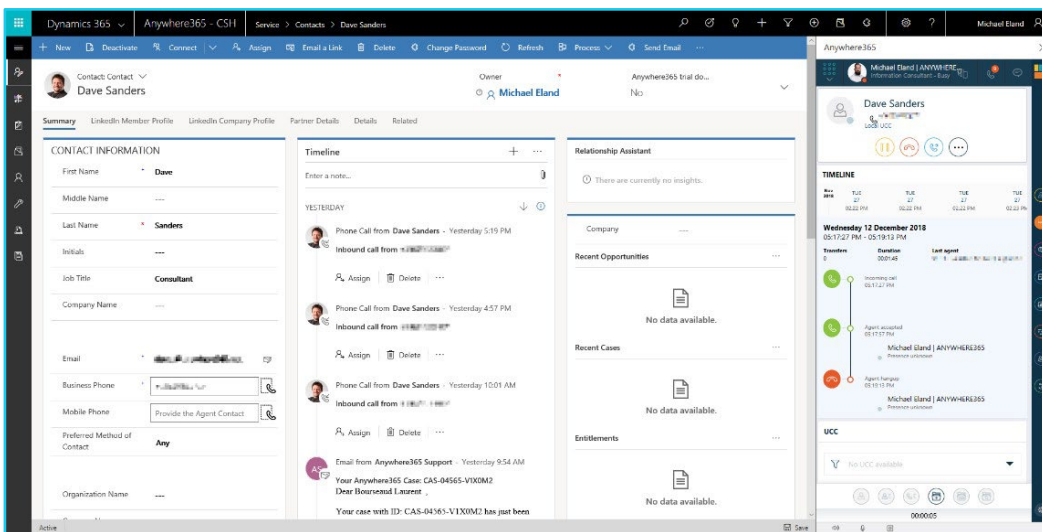
Signing out

1. Make yourself unavailable from Teams profile.
2. Choose a reason code from the WebAgent profile.
3. Click the **Sign Out** icon from your WebAgent profile.
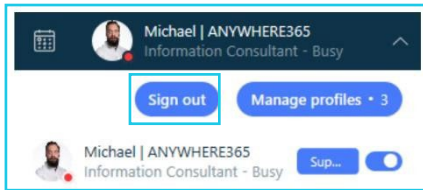
Example Full Screen Web Agent for Dynamics 365 – Active Cal

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