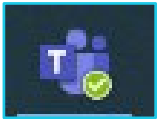




Log into Anywhere365 WebAgent, set your availability status and handle calls from Salesforce.

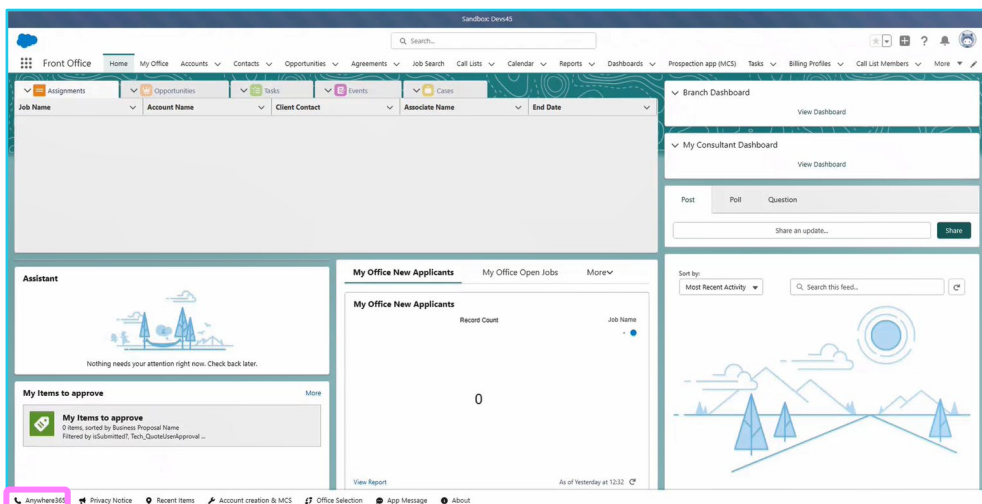
Starting Microsoft Teams

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.

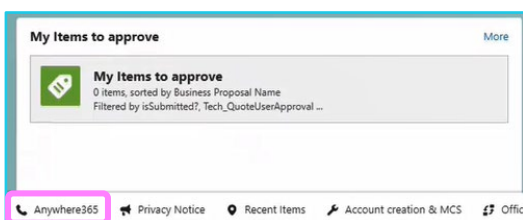


Launch your Salesforce application

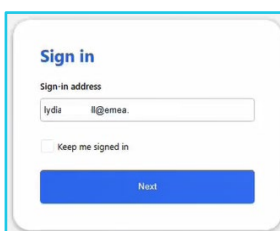
Please refer to your company policy for standard processes and user credentials.



1. Select the Anywhwere365 link from the bottom left-hand corner of the Salesforce window.

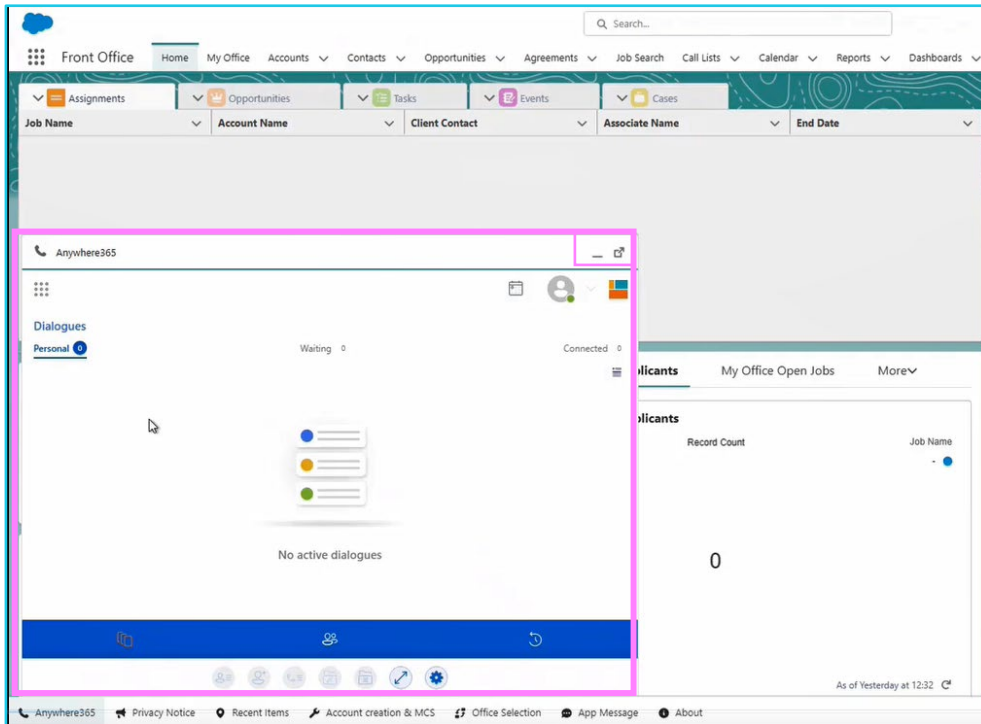


2. On first log in, enter your username, tick the '**Keep me signed in**' box and click **Next**.

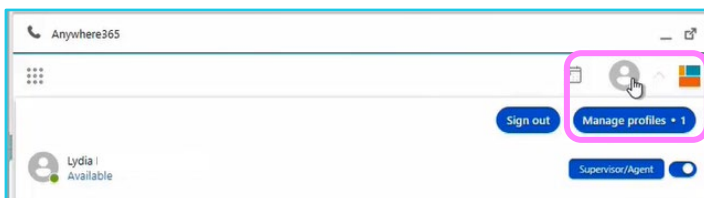


Note: Some steps, screenshots and options may differ slightly depending on the application, browser, operating system and software version you are using.

- The WebAgent window is now open within the Salesforce browser window. You can minimise and maximise as required to toggle between both windows.



- Depending on your build (formal or informal agent) you may also need to sign-in to the queues or skills from the WebAgent profile.
- Select your profile icon on the top right and select **Manage Profiles**.



- If you do have multiple queues available, use the on/off toggle from the front screen to log in **ALL** queues.
- The drop-down profile will display the queues you have access to. Toggle each to switch on/off if you do not need to accept calls from all queues.



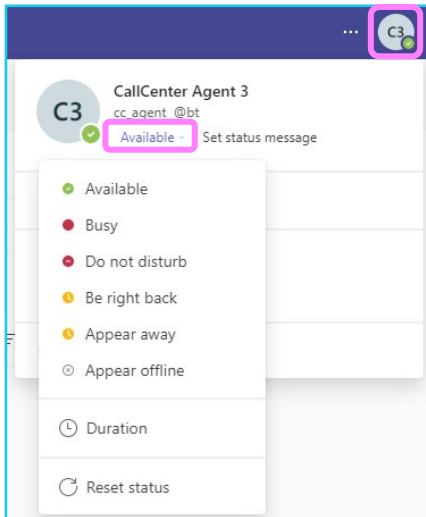
Change availability

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

- Click on your Teams user profile icon.

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

2. Select the presence drop-down list.

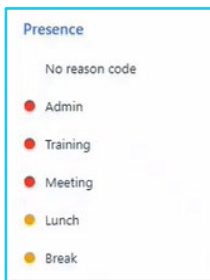


3. Select **Available** status to receive calls from the Contact Centre queues.
4. Select **Busy** or **Away** to stop receiving calls when you go on a break, lunch, or a meeting.

Reason codes

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

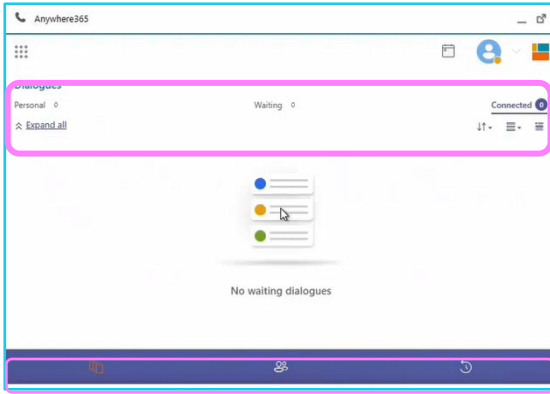
1. Click on your profile icon.
2. Select the reason code you want to use.



3. Your status now shows red, and the reason allocated.
4. Don't forget to make yourself available after your break.

The home screen on the WebAgent is the dialogue view.

- Select to view current calls in the queue: personal, waiting and connected call.
- Change to view the contacts list or calllog list using the icons on the bottom blue bar.

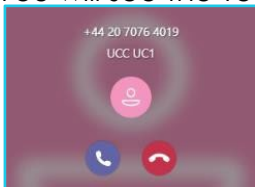


Call handling

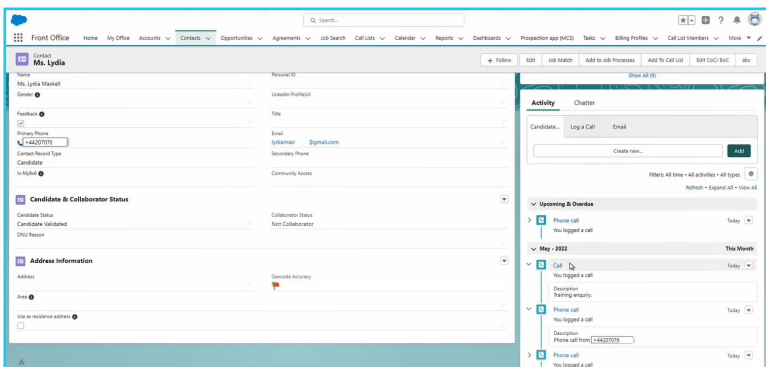
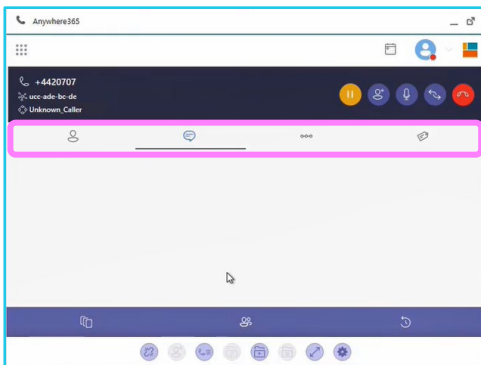
All UCC calls are integrated with the Teams calling interface, you can manage calls from within the WebAgent and Salesforce browser window or from the Teams client window.

Answering incoming calls

- You will see the Teams pop-upcalling window.



- Click the blue phone icon to accept the call.
- If the caller ID is recognised the Salesforce contact window will display the customer details and any previous interactions.



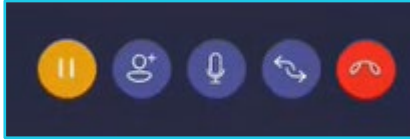
- You can manage the call as per your standard process for Salesforce case or activity handling.

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

- If the caller is not identified, you will be prompted to enter a new contact record for the caller.

WebAgent call controls

- Manage the call from the WebAgent interface using the active call control icons.

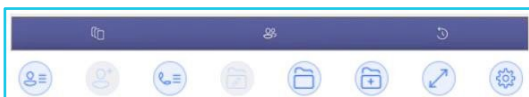


- **Hold / Add Participant / Mute / Transfer / End Call.**

For all Transfer options, please refer to associated Call Handling guide.

CRM toolbar

You can interact with the CRM database using the WebAgent toolbar at the bottom of the call window, or from your standard functionality within the Salesforce application.

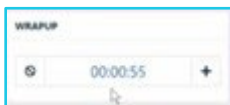


Completing Calls

- **To End the Call:** when you have completed the call click the red end call icon.



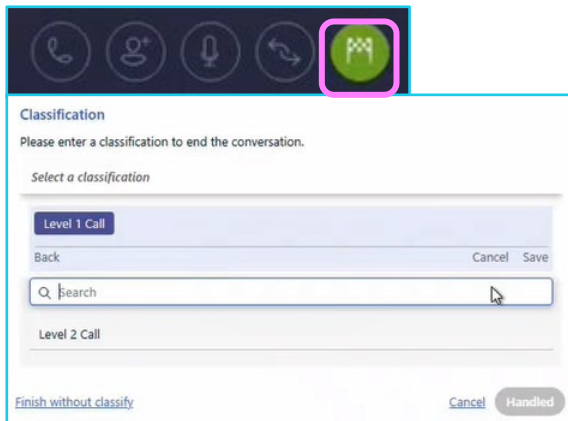
- **Wrap Up Time:** you may have pre-defined wrap up time allocated at the end of each call.
 - Use the end timer button if you do not require the full duration.
 - Use the + icon to add additional time.



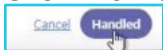
Classifications

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

- At the end of the call click the green flag, select the Classification and save.



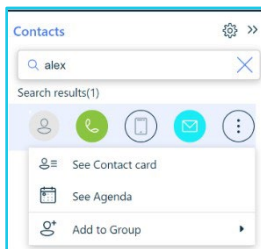
- Click the **Handled** icon to close the activity.



Making outbound calls

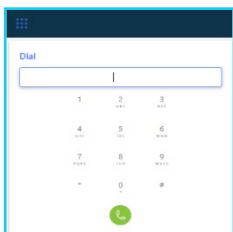
There are multiple ways to make outbound calls.

- 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 Salesforce CRM application.



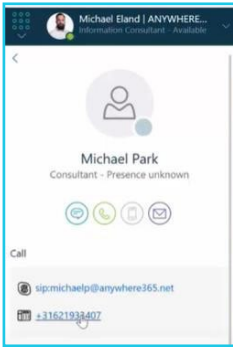
WebAgent: use the contacts field to search for a user. Use the options to chat, call, call mobile or email the contact as available. Or view their contact card, check their agenda, add to your contact list.

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



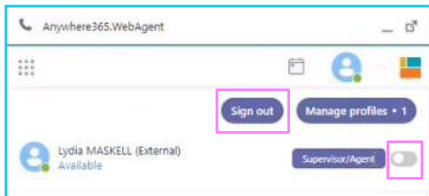
Salesforce contact search: use the contact search via the CRM application to find your contact you want to speak to.

From the contact details tab select their telephone number to initiate the outbound call via the WebAgent window.



Signing out

1. Make yourself unavailable from Teams profile.
2. Click on your profile icon in the WebAgent.
3. Choose a reason code from the WebAgent profile.
4. Toggle each queue to switch off.
5. Click the sign out icon from your WebAgent profile.



6. Sign out of Salesforce.

Learn more

- [WebAgent for Microsoft Dynamics 365 >](#)

Discover more at the [BT Support Centre >](#)

