Anywhere365

Attendant Console for Dialogue Cloud

January 2025, Version1.6

Anywhere365

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2 Note to the reader

This user manual is aimed at users of the Attendant. The images and screenshots in this document are made to illustrate the described functionality. Because of this, some details might be intentionally left out. Depending on the version, available features and configuration, the actual application might differ from the screenshots.

3 Signing in to Attendant Console

To sign in to Attendant Console, point your browser to URL provided by your system administrator, you will be redirected to a login page. Here you can sign in with your Microsoft Teams account.

After a successful sign in, you will be forwarded to the Attendant.

Note: Depending on your environment and previous logins, the Sign in procedure might take place automatically, and you could be forwarded to the Attendant Console immediately.
Logging out of the Attendant Console won't mean that you are automatically logged out of the "Joined Queues". You still can receive calls on Teams until you have deselected the Queues, see paragraph 8.3.2.

4 The Attendant main screen

Once you have signed in, you will see the Attendant screen. The figure below explains the different areas:
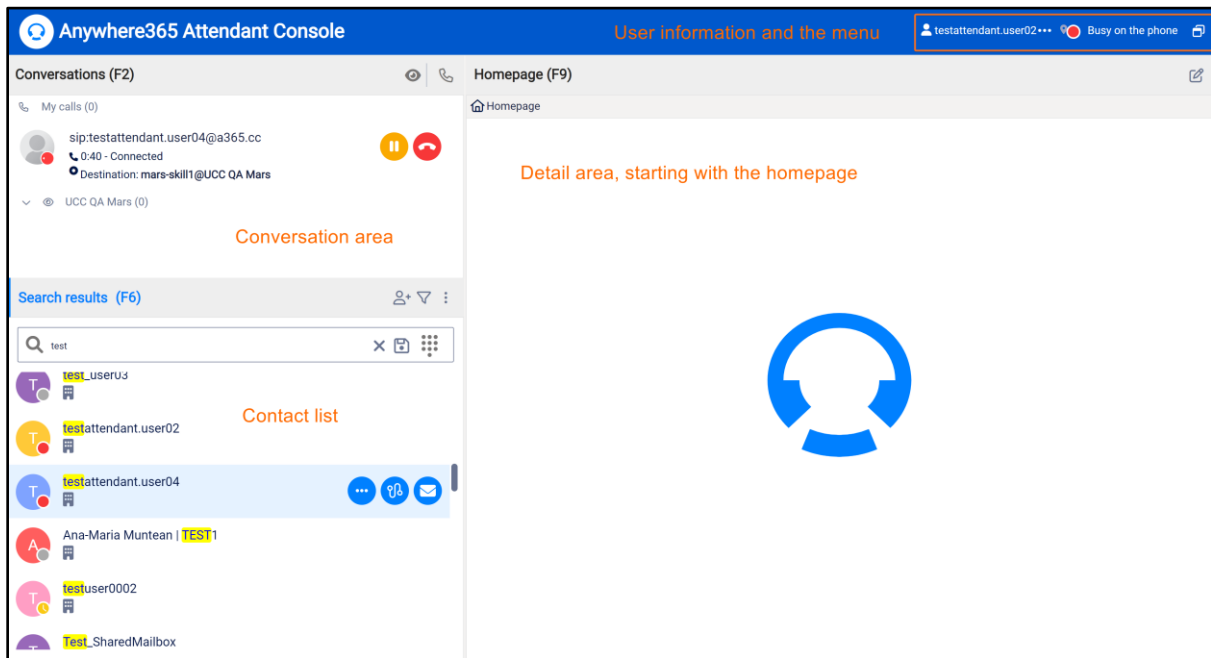
When you click on a conversation in F2, the details of that conversation will be shown in the F3 screen (Conversation details). Clicking on the 'X' will close this screen.
When you click on a contact in the contact list (F6), the details of that contact will be shown in the F7 screen (Contact details). Clicking on the 'X' will close this screen.
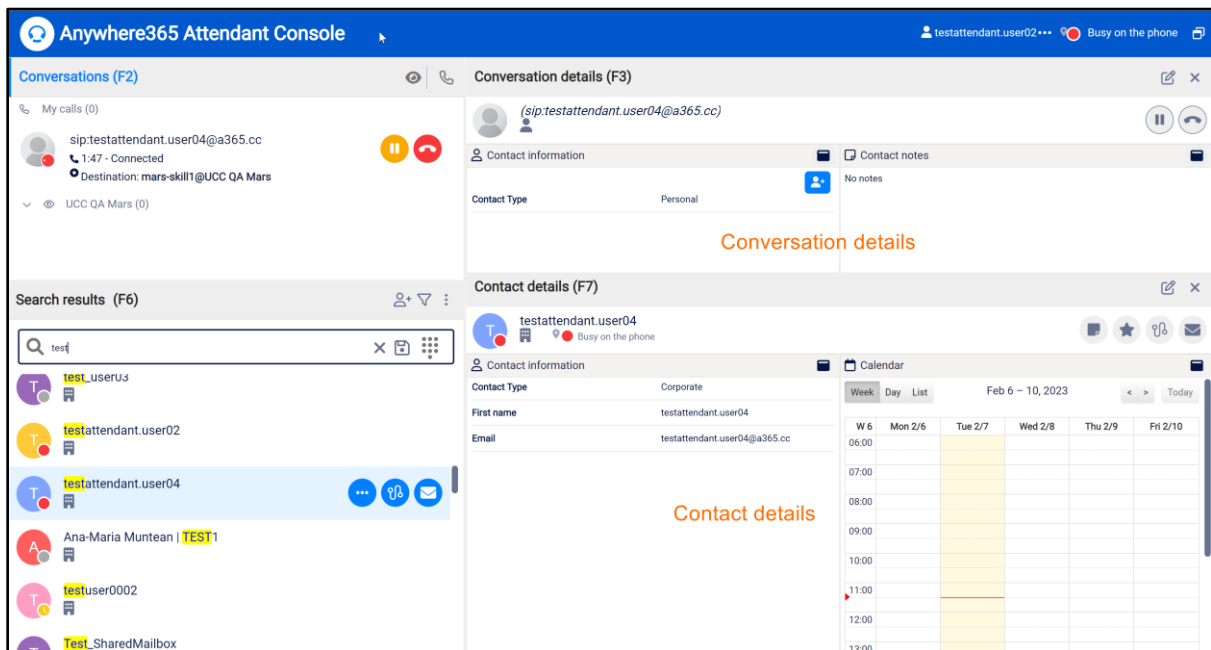
Note that call functionality will be explained in chapter 'Basic call functionality' later in this document.

4.1   Resizing the panels

You can resize each panel to the desired size by dragging the 'splitters' (marked orange below):
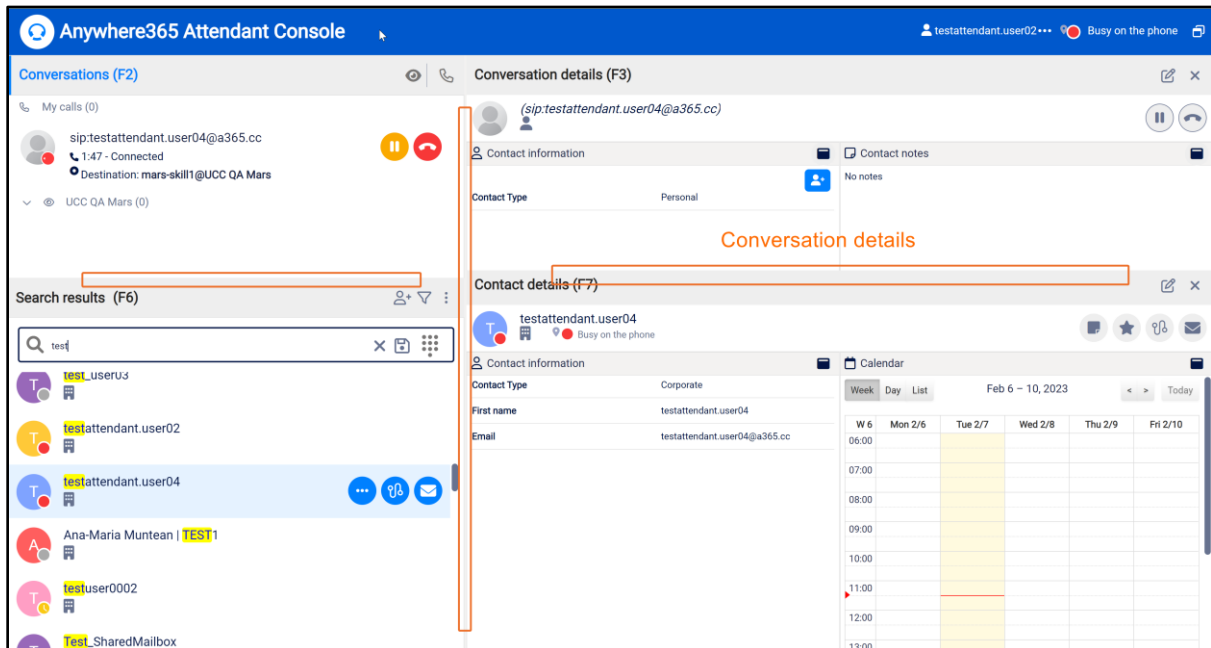
When the panels F2, F3, F6 or F7 have been made so small, that the buttons don't have sufficient space, the buttons will have a drop-down menu. To see the other buttons, click on the drop-down menu.

The positions of the splitters will be remembered between sessions.
The settings are stored on the Anywhere365 server, so you will have the settings available on other devices as well.

4.2   Full screen mode

The menu bar contains a button for making the Attendant full screen:
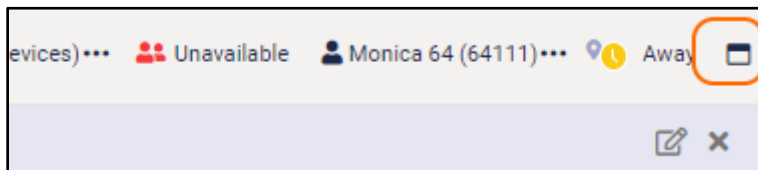
When the full screen mode is on, you can restore the screen to its original size with the restore button:
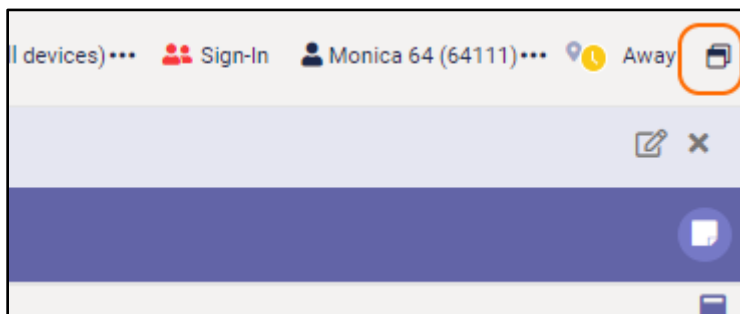
5 The contact list

In the contact list you can search for contacts, filter contacts and perform actions on the contacts that you have found.

5.1 View modes in the contact list

5.1.1 Default mode: Recently used contacts

By default the contact list will show the most recently used contacts. When a contact is used (i.e. a call has been made to that contact and that call has ended, or a transfer to that contact has been done, or a mail has been sent to that contact, or a contact note has been saved for that contact) the contact is moved to the top position of the contact list.
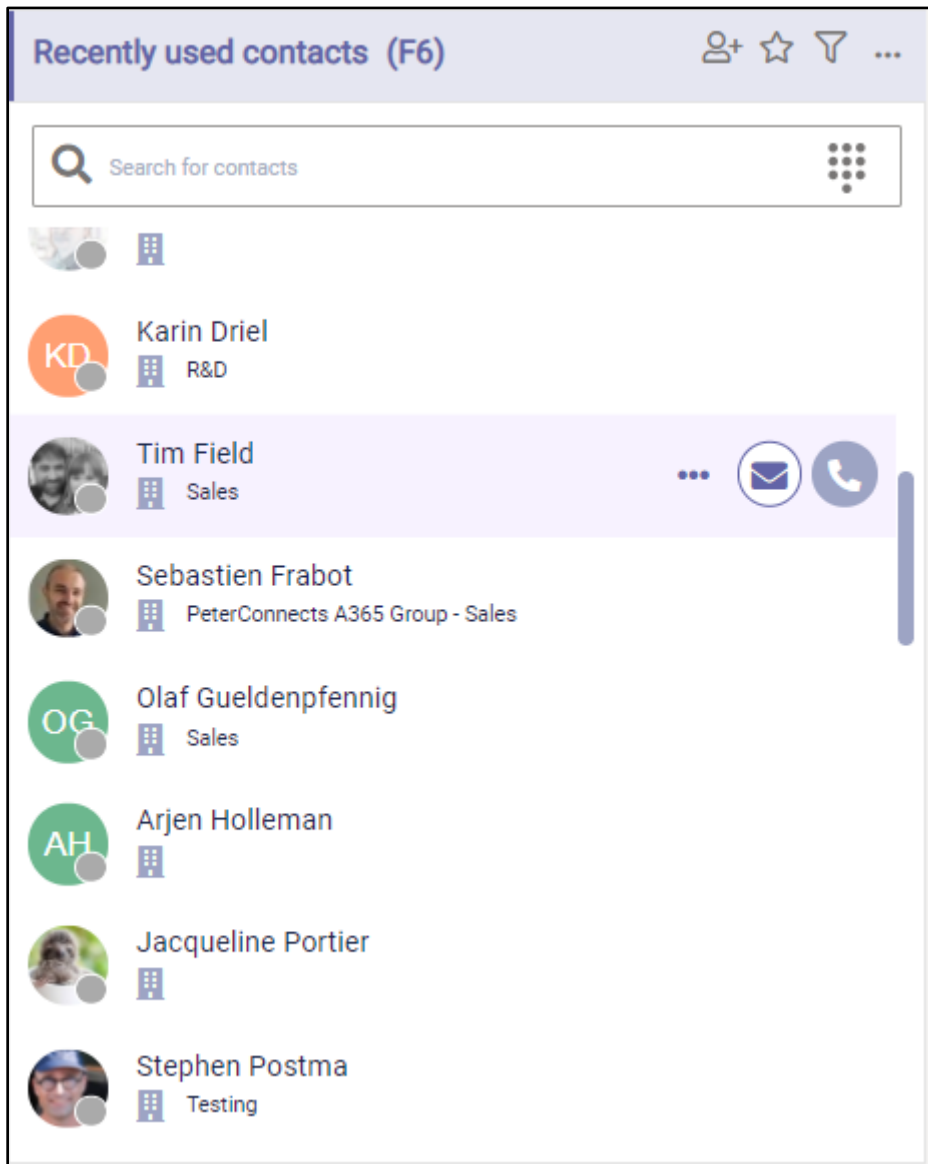
5.1.2 Favorites mode

When you click on the star icon in the title bar of the contact list, you will switch to the favorites mode. In this mode, you only see the contacts that you marked as favorite.

For information about adding, removing and sorting favorites, see paragraph "Favorites".
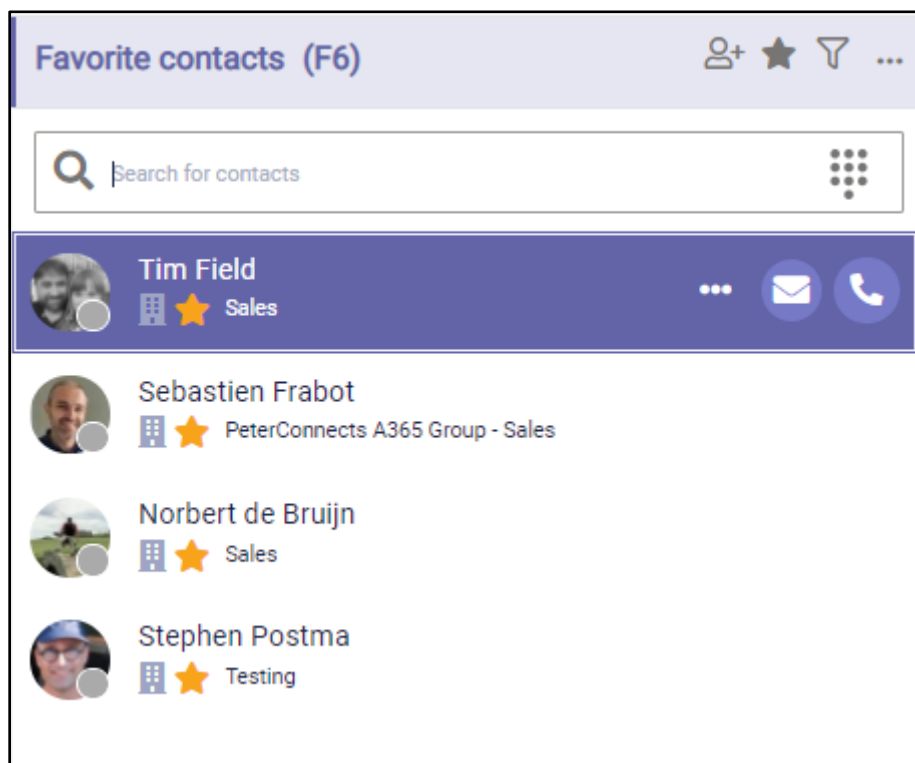
5.1.3 Search mode

Whenever you type in a search term in the search box, or when you filter your contacts via the filter menu, the contact list will switch automatically to the search mode. In that mode the contact list will only show contacts that match your search query or your filter.

Tip: when search has completed, pressing ENTER will dial the top-most search result.
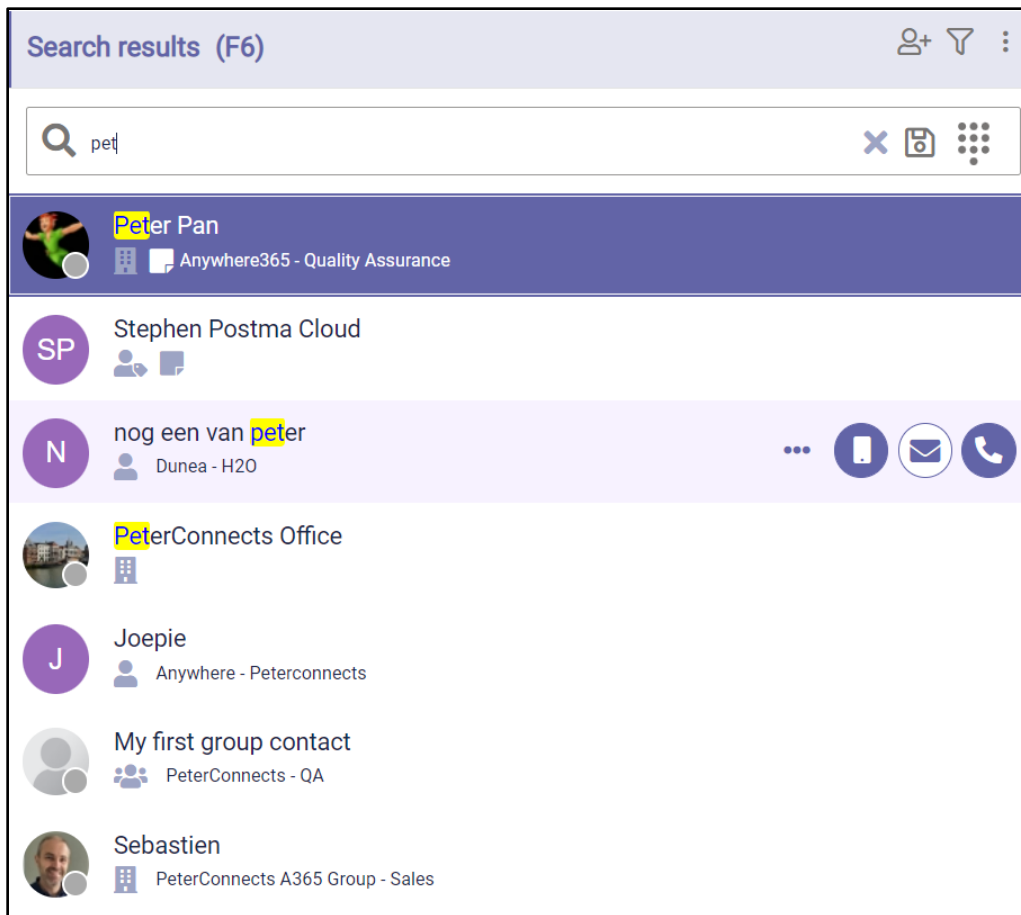
When you turn off the filter and clear the search box, the contact list will return to the previous mode.

5.1.4   Title bar text depending on the mode

The title bar will show in text which mode you currently are working in:

When no filter is on and favorites are not set, the recently used contacts are shown, with the most recently used ones on top of the list:

When the 'Show favorites' button has been clicked, the favorite contacts are shown:
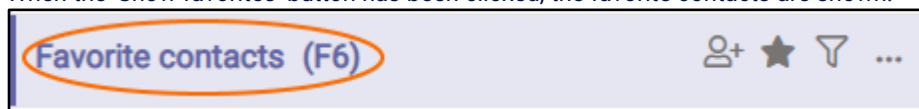
When a filter has been set, the filtered contacts are shown:

This title is shown, when you are searching for a contact, while a filter has been set:

This title is shown, when you are searching for a contact, while no filter has been set:
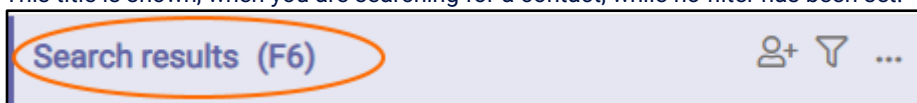
5.2   Viewing the details of a contact

Click on any contact to see the contact details in the right screen.
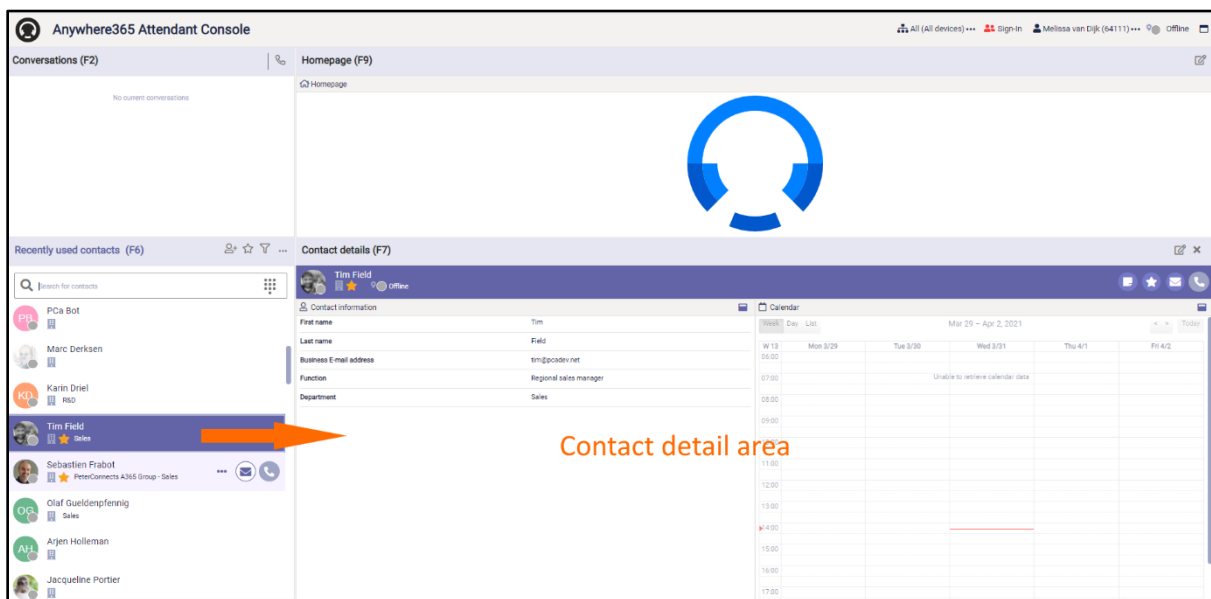
5.3   Multiple columns

The contact list supports multiple columns. When you drag the border of the contact list and increase the width, more columns will be displayed.
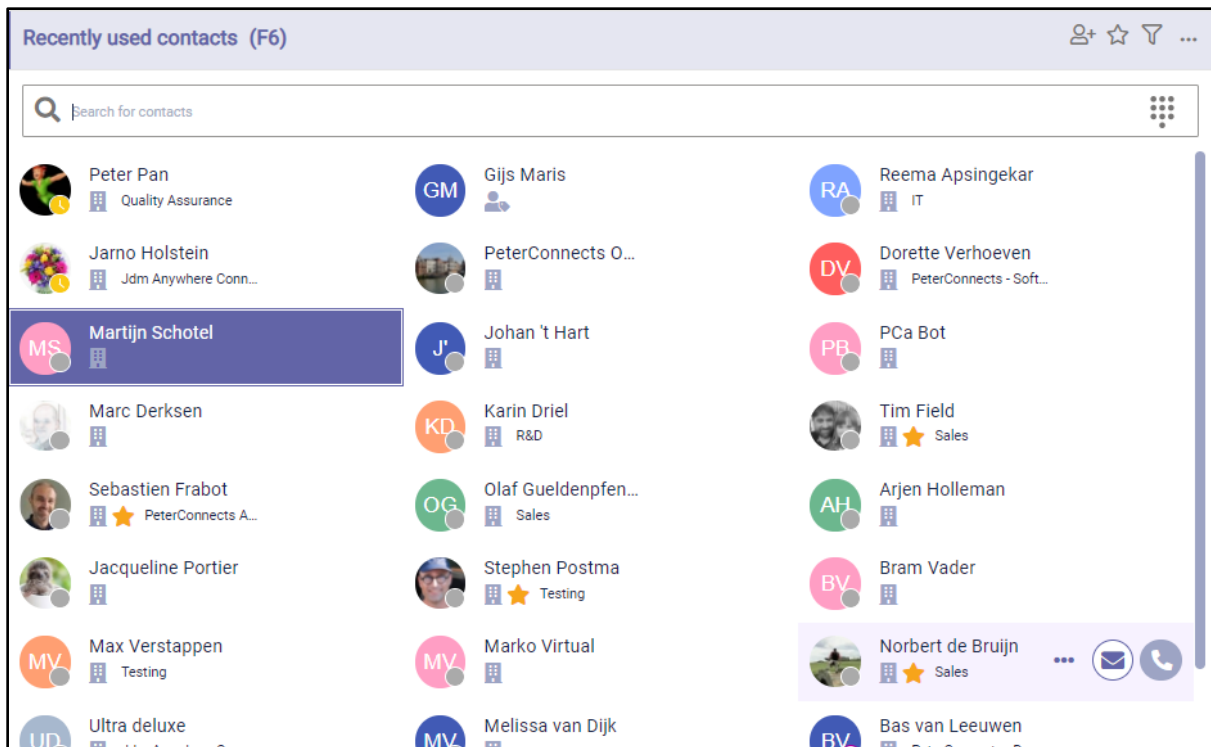
5.4   Contact types

Contacts are categorized by their type, and this is indicated by the following icons:

 Personal contact. This contact is only visible to you.

 Shared contact. This contact is a contact created manually, that is visible for all persons..

 Corporate contact. This contact is available for all users in the company.

 Queue. This is not a real contact, but a queue to which you can transfer calls.

 External contact.

5.5   Presence

When the application is configured to show a contact's presence state, then the contact list might look like this:

Depending on the type of telephony system your company uses, the presence state may appear slightly differently. The colors however will remain the same. They are:

Green: Available
Red: Busy or Do Not Disturb
Orange: Away
Grey: Offline or unknown state

Hovering over the presence state indicator with your pointer will show the presence state in text. The presence state is also shown in Conversation details panel (F3) and in the Contact details panel (F7), see the next paragraph.

5.6   Actions in the contact list

When you hover over or select a contact, you have the following actions available:

Call the contact.

Send the contact an email.

Transfer the current call to the contact (only available when you have a current (connected) call).

Add or edit the note for the selected contact

 Add the selected contact to or remove the selected contact from your list of favorites

In F6, the buttons "Edit Contact Note" and "Add to Favorites" are in the drop-down menu.
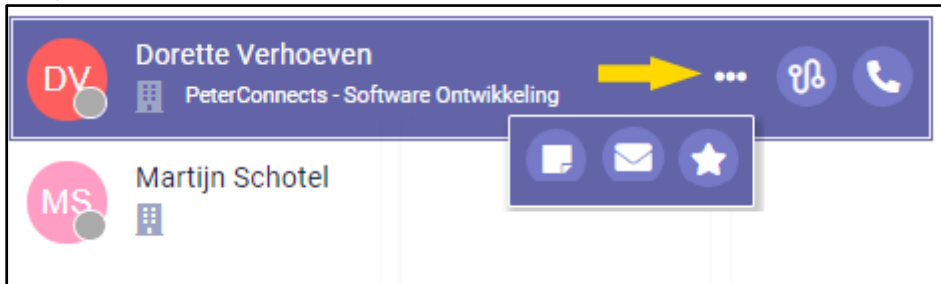
5.7   Managing your favorites

5.7.1   Adding a favorite

You can mark a contact as favorite by clicking on the star in the contact detail area:
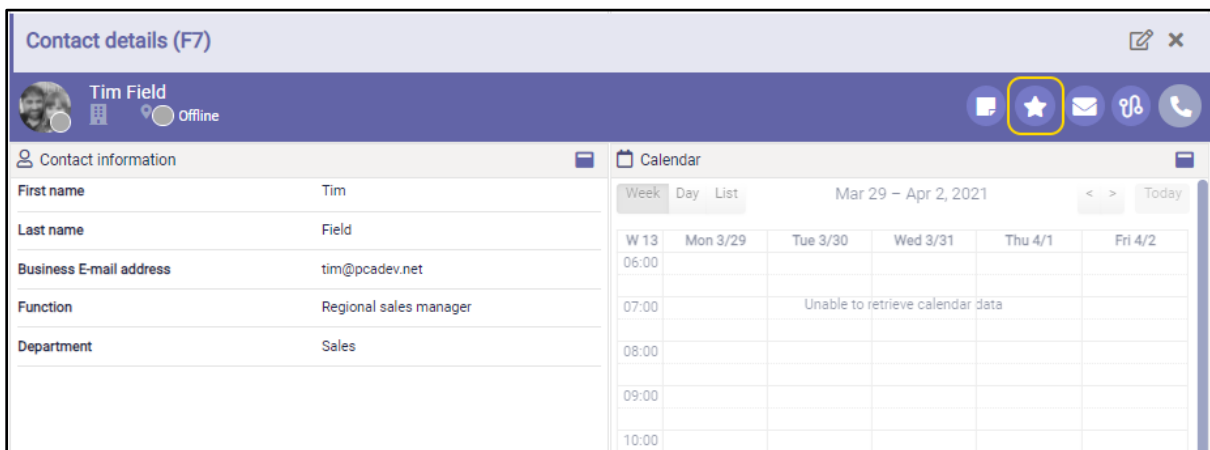
You can also use the favorites button in the contacts list (F6)
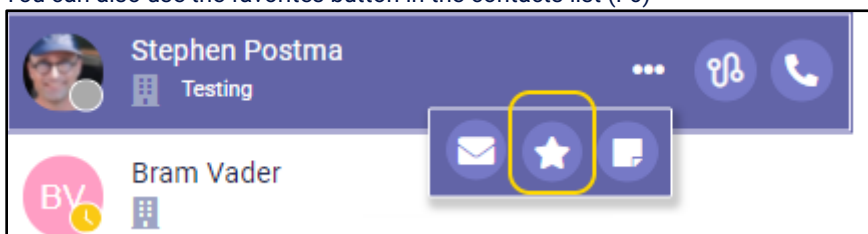
When the contact has been marked as favorite, a star will change color and become visible:
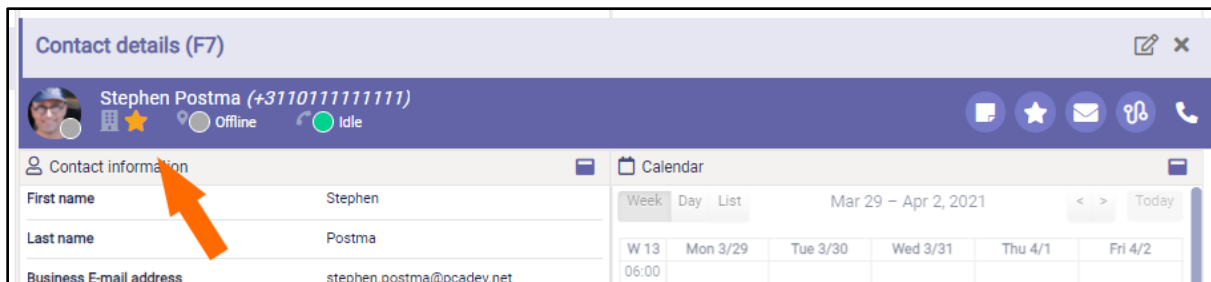
5.7.2 Removing a favorite

You can click on the 'Remove from favorites' button again, to remove the contact from your favorites.

5.7.3 Displaying favorites

The contact list indicates your favorites with a star:
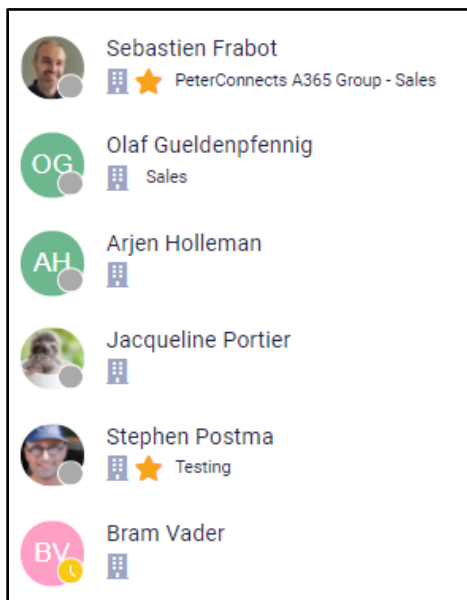
To view all your favorites, you can switch to the 'favorite mode' by clicking on the star in the title bar:
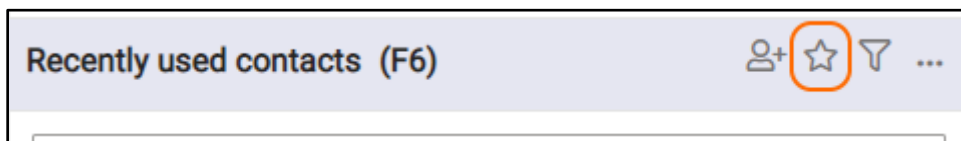
5.7.4 Sorting favorites

When you are in the favorites mode, you can arrange your favorites by dragging and dropping a contact from one place to another. The dashed line indicates the place where your favorite will be moved.
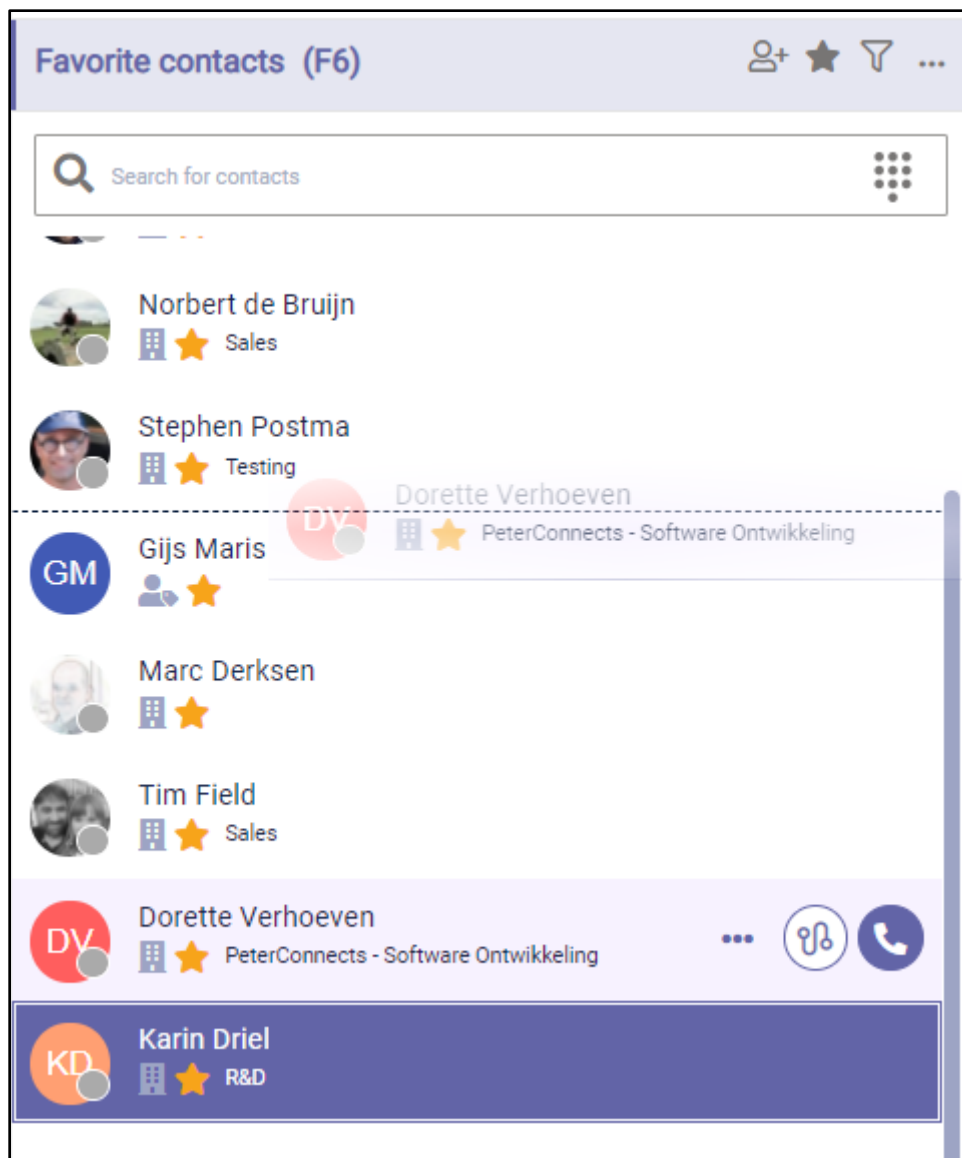
When there are multiple columns in the contact list, the dashed line will appear to the left or right side of the contacts, depending on whether you hover over the left or right part of a contact:
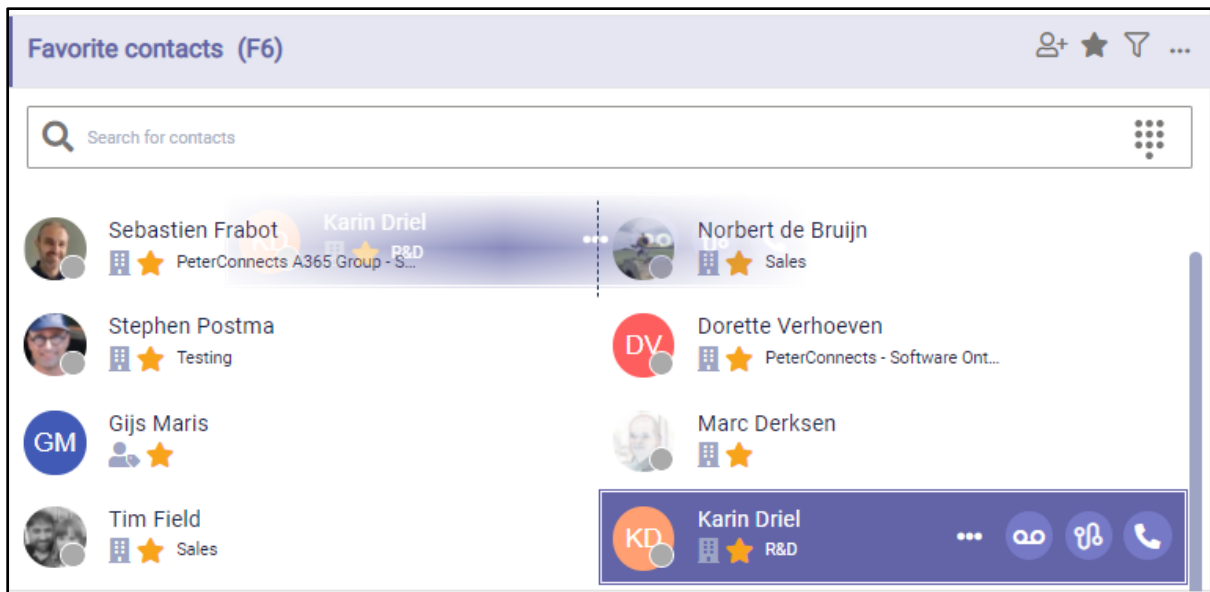
1.1.1. Direct opening Manager contact info in F7 (Microsoft login only)

When clicking to manager name in a specific contact displayed in F7, the user will be able to see information or to interact with the manager of that specific contact. To return back, after opening the manager details, the user have to click to the contact name in F6
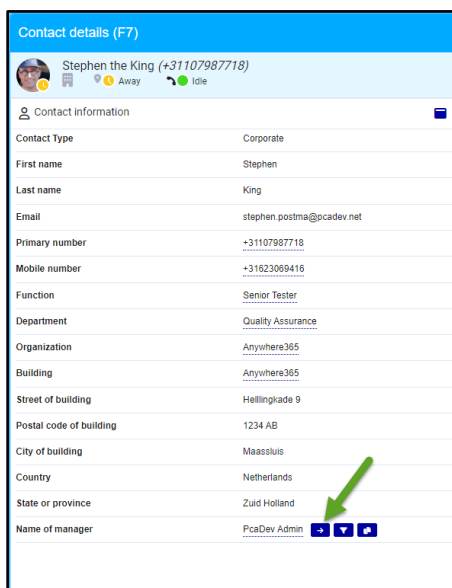
Direct opening Manager contact info

Often being in contact with a customer and looking for a contact in F6 and this contact is not available one asks to know his manager or want to speak to this manager. With the possibility the of opening the manager contact information a call or transfer can be initiated from F7 that will show that contact information of the manager.

With the button

5.8 Searching and filtering

5.8.1 Searching a contact

You can start typing to enter text in the search box to search in the contact list (you do not have to click into the Search field first). Your search text will be highlighted in the search results:

Select X in the search box or press "Escape" to clear the search text.

All fields that you see in the contact information are searchable in the search box in F6.

Note: It is not possible to search on text that is not at the beginning of a word. For example, if a name is 'Elliot', it is possible to search on Ell', but not on 'iot'. When a name is 'Van Halen', it is possible to search on 'Hal'.

The contact list search results will be sorted based on the field in which the search term is found. From most important to less important the order is:

1. firstname
2. displayname and lastname
3. email
4. department
5. function
6. other fields.

This order of this list indicates the weighting of the search. If the searchtext is found in the same field then it will get more priority if it is an exact match. So when searching for "Rob" a person with firstname "Rob" will be shown first and a person with firstname "Robert" will be shown later. If the field and whether it is an exact match or not are equal then the favorites are shown first followed by the most recently used.

Note: A contact's displayname is defined in the User management of Microsoft 365 admin center.
      When the result limit is reached, not all matching contacts are displayed. In such a case, enter a more precise search term to refine your search to find a specific contact.

5.8.1.2   Searching for a number
You can also search for a number. When the number is not found, you can still dial that number:

Instead of typing the numbers, you can also use the dial pad. You can toggle the dial pad on and off by selecting the dial pad ⊞.
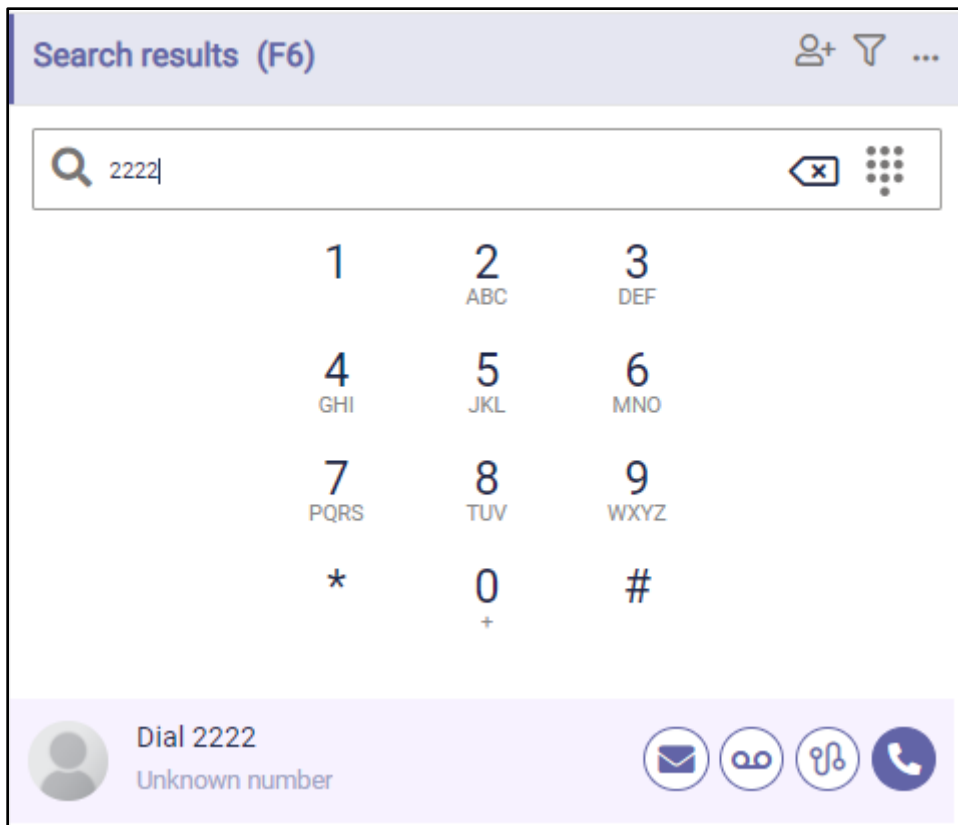
5.8.1.3 Searching contact notes

The contact notes can be searched now. You can do a specific search on with the prefix "note:" or a note specific search without the prefix.
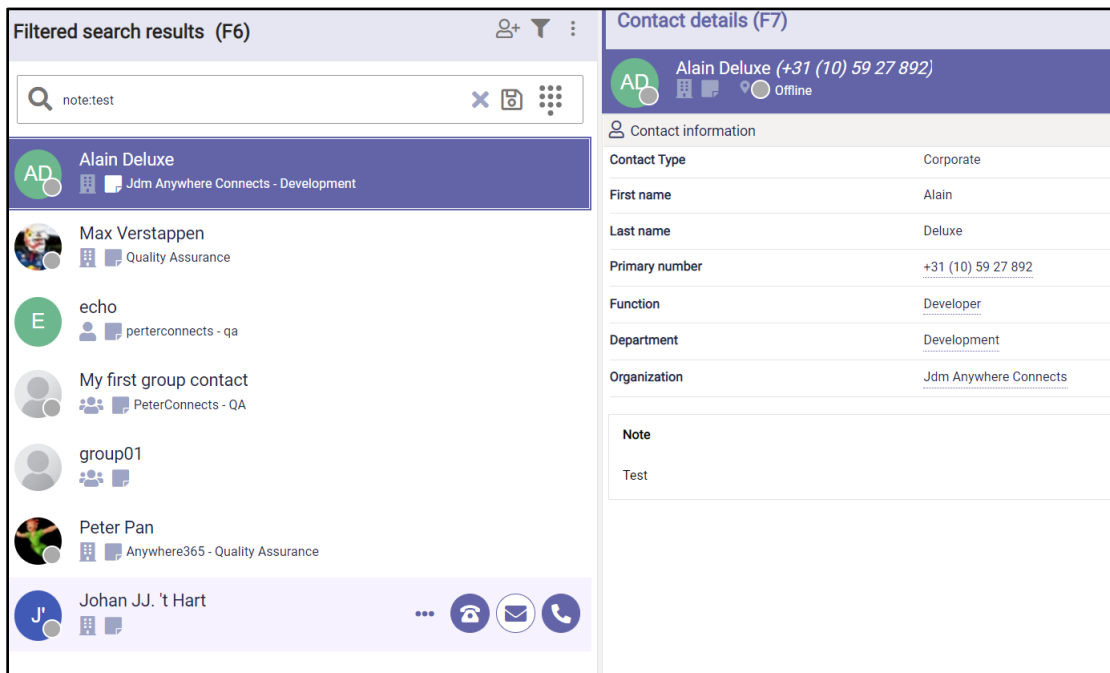
So when searching with a search term like "note:test", it will match contacts that have a contact note with a word that starts with (or equals to) "test".

When searching with a search term like "test" it will match the same contacts plus the contacts that have any other field with a word that matches "test".

A match on contact note will have the lowest priority so it is displayed at the bottom.

5.8.2   Filtering contacts from the filter menu

You can filter the contact list to narrow down the number of contacts you see. Via the filter settings, you can select which contacts you want to see.

You can select which type of contacts you want to see.
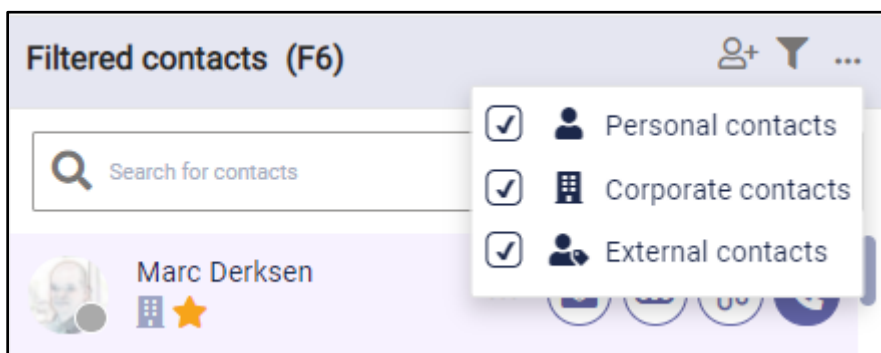
For example, you can select 'Personal contacts' to display only your personal contacts:
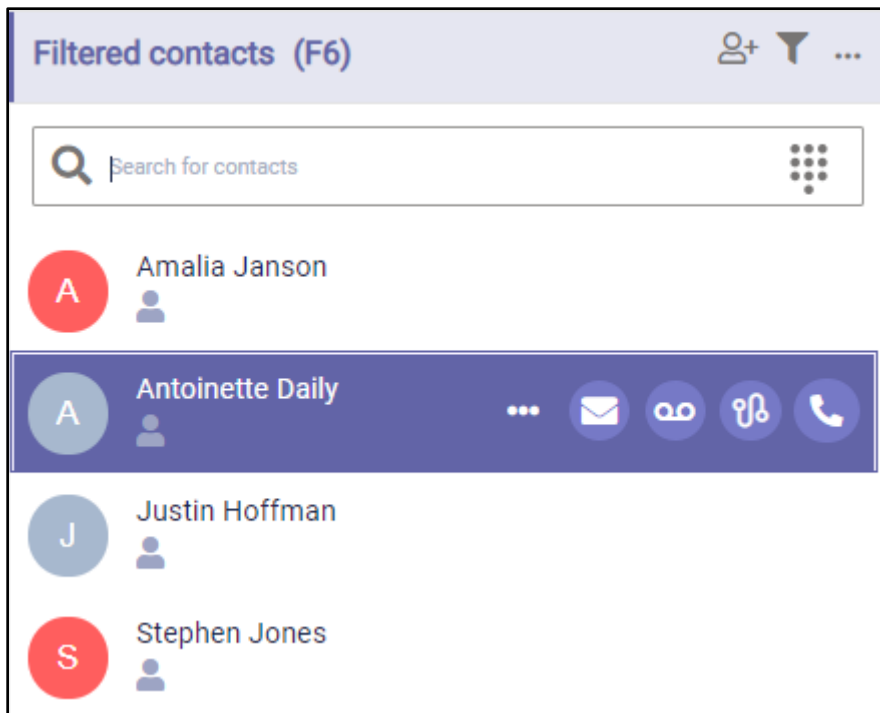
When you select one of the filter options, it is applied immediately and will remain active until you select the 'Filter contacts' button once again.

If you reselect 'Filter contacts' button, the last used filter options will be reapplied to your contact list.
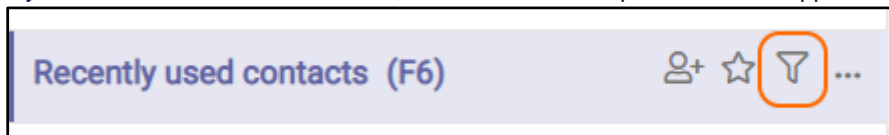
When the 'Filter Contacts' icon is solid, the filter is active:

When the 'Filter Contacts' icon is outlined, the filter is inactive:

Your filter settings will be saved between sessions.

5.8.3   Saving search queries
In the Attendant you can save your search queries so you can use them later on. The saved search queries actually are a combination of a filter and/or a search string.

5.8.3.1   Saving a search query
You can create a filter, whenever you are filtering and/or searching, for example when you are filtering on "Personal contacts" and you want all contacts that have "mon" in the name:

When you want to save this query, you can click on the "save" button in the search bar:

Note: The save button can be disabled, if you have reached the maximum number of saved queries. In that case, you have to delete a saved search query first.

When you click on the save button, a popup will be shown, where you can give your saved query a name:
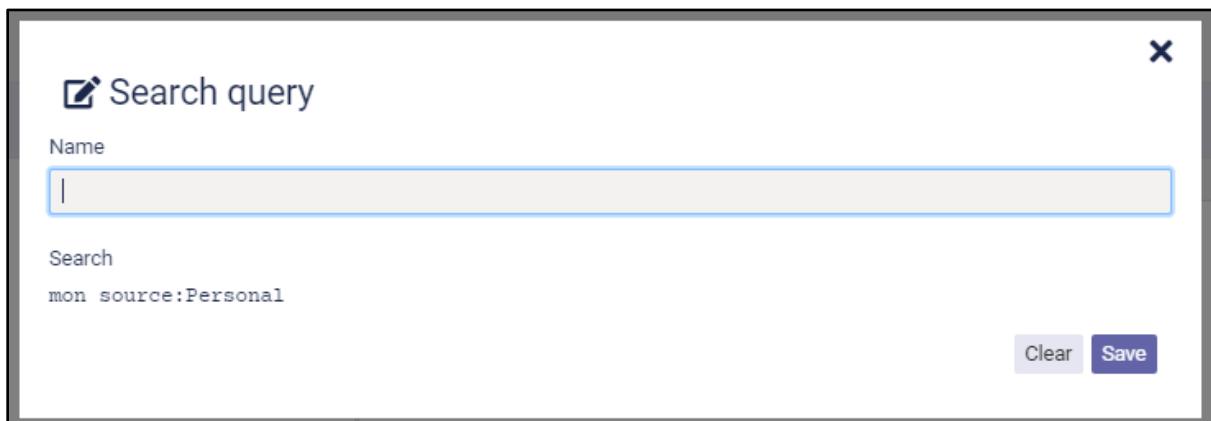
In the popup, you can also see the Advanced Search text, that is used to list these contacts. (For more information about the Advanced Search syntax, see the paragraph about Advanced Search later on in this chapter).

Then click on button "Save", to finalize your search query. If you open your filter drop down, you will see that your search query has been saved. Right below the contact types, you will see a section that contains your saved search queries:
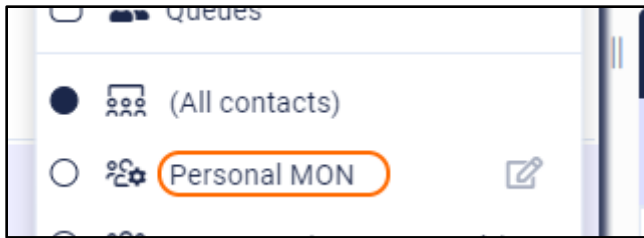
When you click on a saved search query, the contact list will show only the contacts that apply to that query. When you click on "(All contacts)", the filter will be cleared and you will see all contacts again.

5.8.3.2   Editing a saved search query

You can change the name of a saved search query by clicking on the edit icon . Then the popup will appear, where you can enter a new name.

5.8.3.3   Deleting a saved search query

You can delete a saved search query by clicking on the edit icon . Then the popup will appear. Click on the trashcan button to remove the name. A question will be shown if you want to delete the item, with two buttons "Yes" and "No". Click "Yes" to delete the item or click "No" to get back to editing the item.

5.8.4   Advanced search

The Attendant supports advanced search. This means that you can build your own search string that also includes filter options.

5.8.4.1   Syntax

A search string contains keys and values. A key-value pair looks like this:

```
key:values
```

for example:

```
source:Personal,Corporate
```

In the example above, the search will be limited by only Personal and Corporate contacts.

A key-value pair of values cannot contain spaces, commas or a colon. If you need it to contain those, then the values need to be included in a set of quotes. For example:

```
key:"value 1","value:2"
```

5.8.4.2   Overview of keys and values

<no key>	All values in the string that are not preceded by a key will be used as a search term. For example:
	
	`dav`
	
	will look for contacts that contain the word "dav" in either the first name, last name or some other fields. Another example:
	
	`dav bow`
	
	will look for all contacts that contain either the word "dav" and the word "bow" in the first name, last name, or some other fields.

Source	This will limit the search to the specified sources. For example
	`source:personal`
	will look for all personal contacts.
	The various sources are: - Personal - Corporate - External

A combination of keys and values can be used for searching. For example:

`dav source:personal`

looks for all personal contacts and 'dav' in either the first name, last name or some other fields.

It is possible to search the other contact details fields as well, the following fields are searchable:

Contact details field name	Example	Azure AD field name
First name	`FirstName:dav`	First name
Last name	`LastName:dav`	Last name
Email	`Email:dav@dav.com`	Email
Primary number	`Phone:123`	Office phone
Mobile number	`MobilePhone:123`	Mobile phone
Function	`Function:dev`	Job title
Department	`Department:sales`	Department
Organization	`Organization:dev`	Company name
Building	`Building:dav`	Office
Street of building	`BuildingStreet:dav`	Street address
Postal code of building	`BuildingPostalCode:123`	ZIP or postal code
City of building	`BuildingCity:dav`	City
Country	`BuildingCountry:dav`	Country or region
State or province	`BuildingState:dav`	State or province
Name of manager	`Manager:dav`	Manager
Extra 1	`Extra1:extracol19`	
Extra 2	`Extra2:extracol19`	
Extra 3	`Extra3:extracol19`	
Extra 4	`Extra4:extracol19`	
Extra 5	`Extra5:extracol19`	

For some fields in the contact details, a clickable filter icon appears next to the value, which inserts it as a search term, making it easy to find more contacts of the same kind:

Following fields show this clickable filter icon:
- Function
- Department
- Organization
- Building

5.8.5 Copy contact information

The Attendant Console provides functionality for easy copying contact information. Most of the contact fields present a [icon] button when hovering over it. By clicking on this button the information in the field will be copied.

Contact details (F7)

Peter van Baal | ANYWHERE365 *(+31 (0) 10 250 3018)*
🏢 📍✓ Available

👤 Contact information

Contact Type	Corporate
First name	Peter
Last name	van Baal
Email	peter.vanbaal@anywhere365.net 📇
Primary number	+31 (0) 10 250 3018 Copy
Function	Product Owner
Department	Product Management
Organization	Anywhere365
Building	NL
Street of building	Hal B & C Van Nellefabriek, Van Nelleweg 1

5.8.5.1   Copy information from the Notes

Often the additional Notes contain information, like telephone numbers that need to be copied. Copying this information is done by selecting the information that need to be copied and automatically it will copy the information.

Contact details (F7)

Peter van Baal | ANYWHERE365 *(+31 (0) 10 250 3018)*
🏢 🗒 📍✓ Available

👤 Contact information

Primary number	+31 (0) 10 250 3018
Function	Product Owner
Department	Product Management
Organization	Anywhere365
Building	NL
Street of building	Hal B & C Van Nellefabriek, Van Nelleweg 1
Postal code of building	3044 BC
City of building	Rotterdam
Country	Netherlands
State or province	Zuid-Holland
Name of manager	Ruud Lendfers	ANYWHERE365 →

Note

The mobile number is: +31612345678

5.9   Editing contacts

5.9.1 Adding a contact
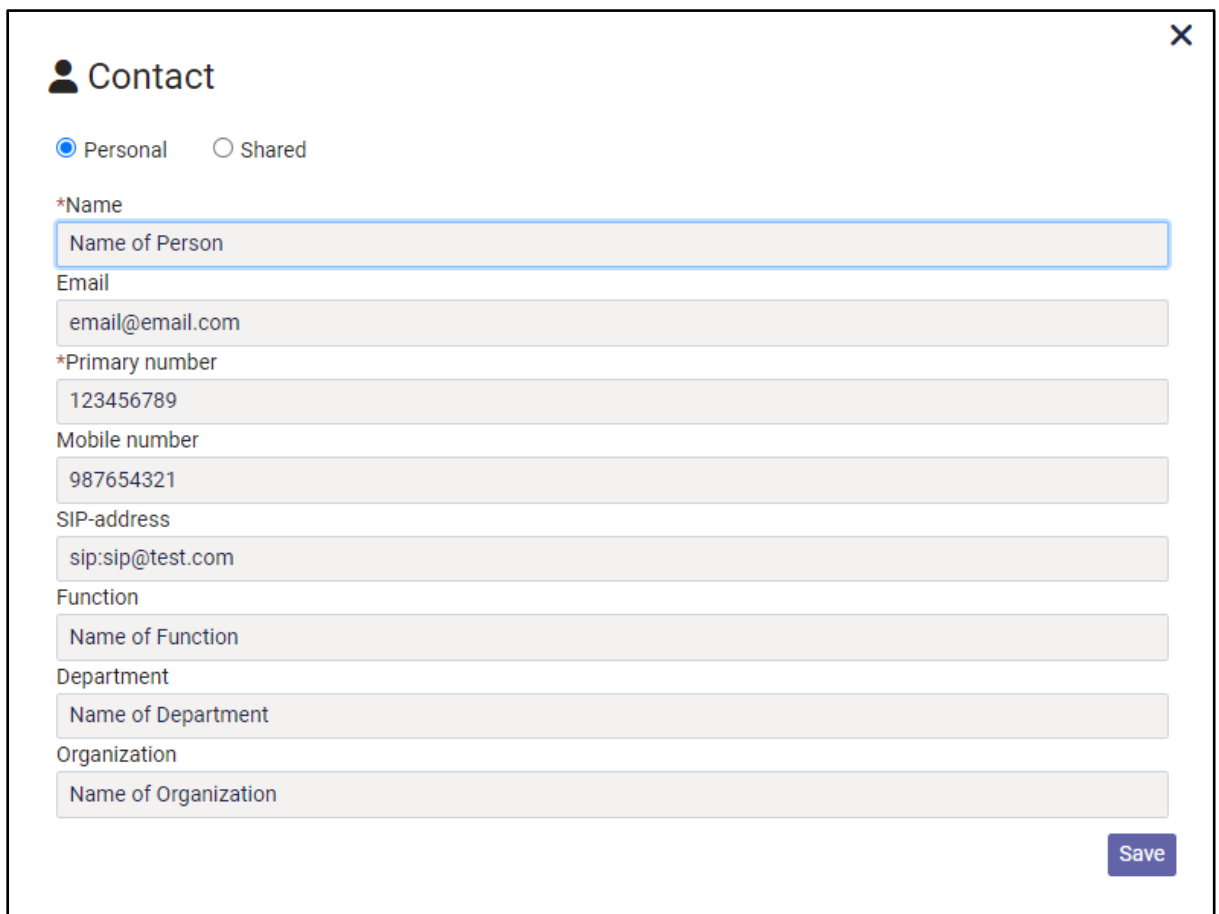
You can add personal contacts to the contact list. The steps are:

1. Click on the 'Add contact' button in the title bar of F6:

2. Now, a pop-up appears in which you can enter the data of the new contact. Click on the 'Save' button to save the new contact. Click on 'X' to cancel.

   Note that the fields in the image might differ depending on your edition of the Attendant.

Another way to add a contact is:

1. Search for a number in the search box of the contact list.
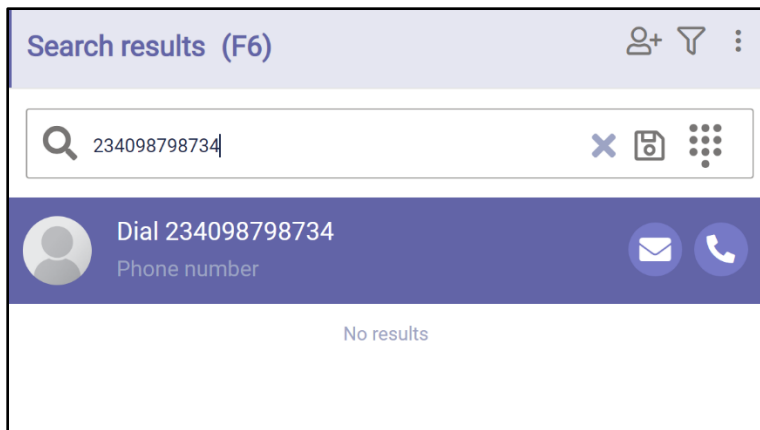
2. Click on the 'unknown number' contact in F6. Then in the Contact Detail panel, you will see a button "Add" in the contact information widget. Click on that button.

   You can also use the button in F6 to add the contact.

3. Then the contact pop-up appears, see at the beginning of this paragraph.

5.9.2   Editing a contact

When you want to edit a personal contact, first search for the contact via the search box in the contact list and select the contact. Then click on the button "Edit" in the Contact Information widget in F7 or click the "Edit" button in F6 itself (Hidden behind the 3 dots).
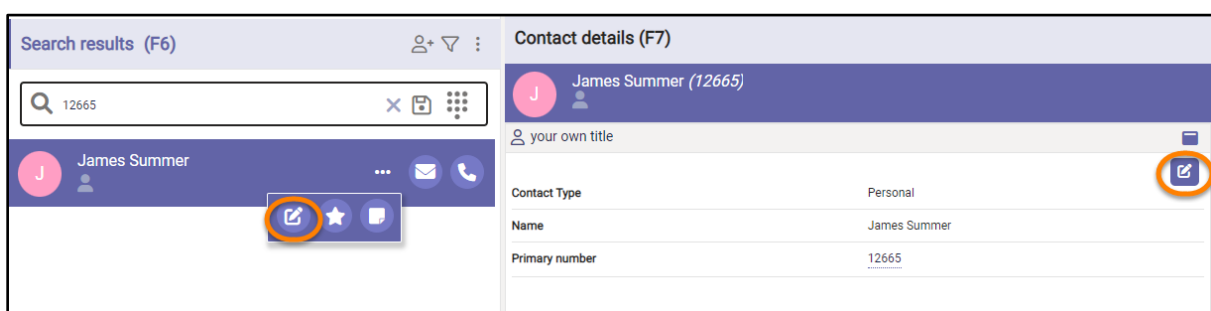

The contact pop-up appears. When you are ready editing the contact, click on the button 'Save' to save the changes or on the 'X' to cancel editing.

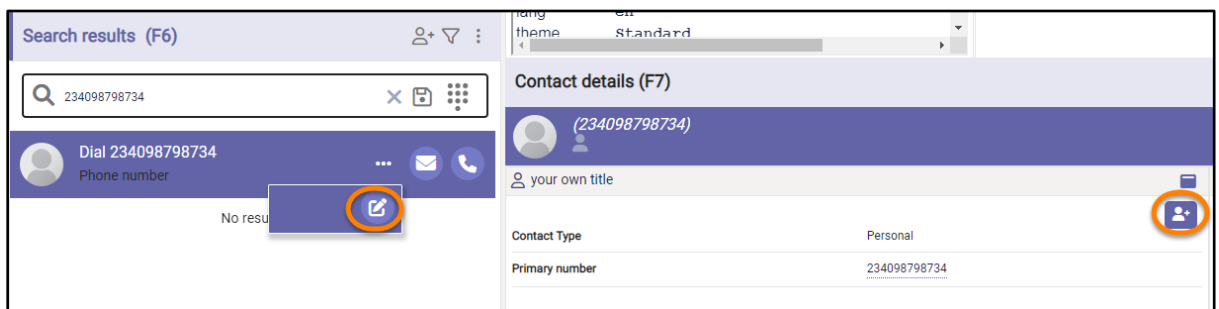*Note that the fields in the image might differ depending on your edition of the Attendant.*

5.9.3   Deleting a contact

To delete a personal contact, first search for the contact in the search box of the contact list and select the contact. Then click on the button "Edit" in the contact information widget in F7 or click the "Edit" button in F6 itself (Hidden behind the 3 dots).

A popup will open where you can edit the contact, but there will also be a trashcan button:

A confirmation message will be displayed, asking if you really want to delete this contact.

Click on "Yes" to confirm to delete the contact or click on "no" if you don't want to delete the contact.

5.10 Shared contacts

Shared contacts are managed within the Attendant Console, but contrary to Personal contacts, they are visible for all Attendant users. The privilege to manage Shared contacts can be controlled from the Admin portal (see section).

5.10.1 Filtering shared contacts

You can filter on Shared contacts in the filter menu.
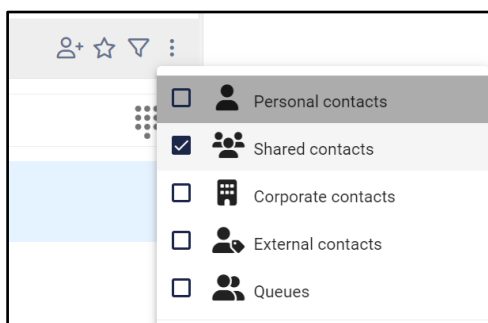
5.10.2 Adding a shared contact
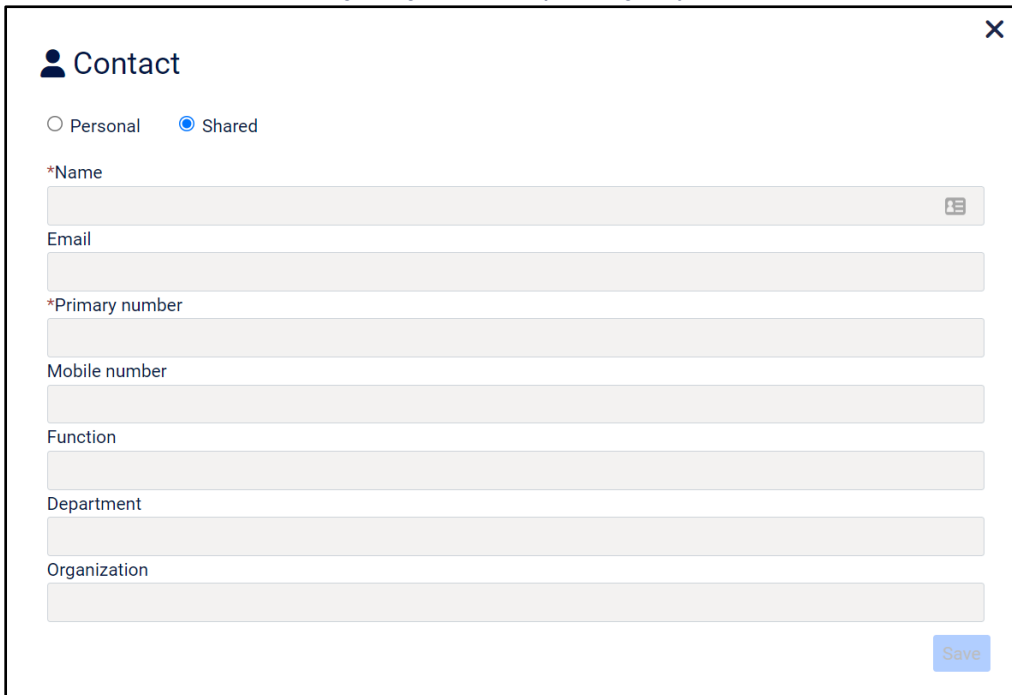
You can add Shared contacts to the contact list in case your account has the rights to do so assigned in the Admin Portal. The steps are:

1. Click on the 'Add contact' button in the title bar of F6:
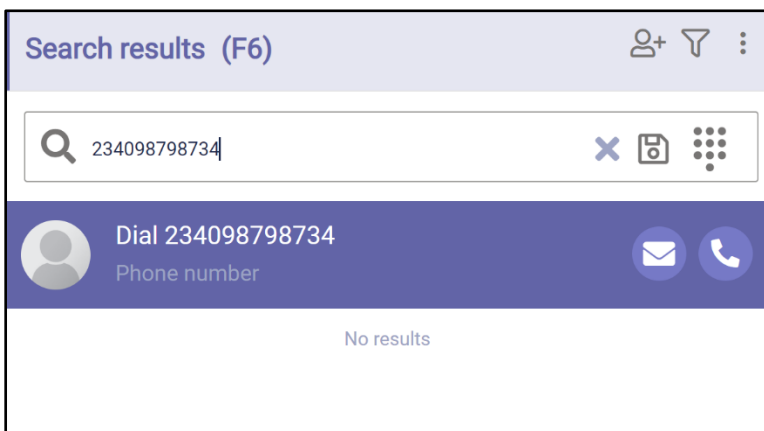
2. Now, a pop-up appears. Select 'Shared contact' and enter the data of the new Shared contact. Click on the 'Save' button to save the new contact. Click on 'X' to cancel.

    Note that the fields in the image might differ depending on your edition of the Attendant

Another way to add a contact is:

1. Search for a number in the search box of the contact list. |

2. Click on the 'unknown number' contact in F6. Then in the Contact Detail panel, you will see a button "Add" in the contact information widget. Click on that button.

You can also use the button in F6 to add the contact.
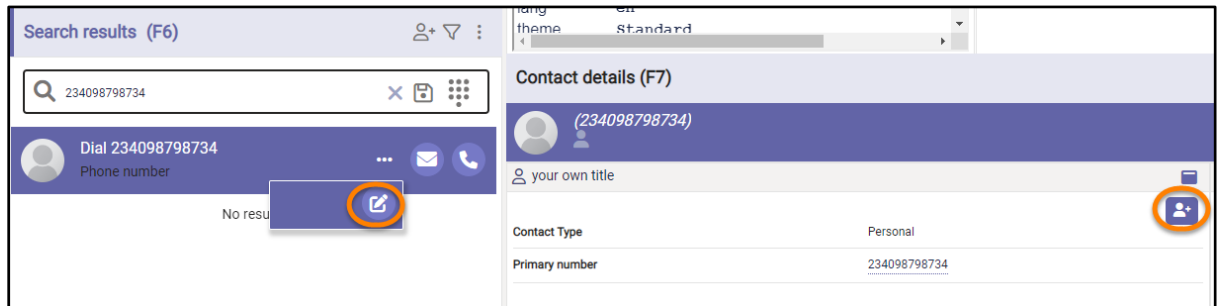
3. Then the contact pop-up appears, see at the beginning of this paragraph.

5.10.3 Editing a Shared contact

When you want to edit a Shared contact, first search for the contact via the search box in the contact list and select the contact. Then click on the button "Edit" in the Contact Information widget in F7 or click the "Edit" button in F6 itself (Hidden behind the 3 dots):
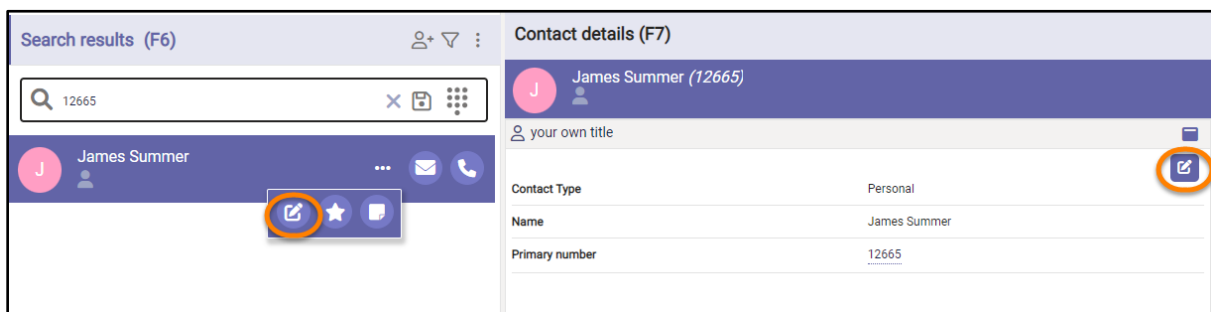
The contact pop-up appears. You can edit the contact, including changing it from Shared contact into Personal contact. You can also convert a Personal contact into a Shared contact and thus making it available for all users. When you are ready editing the contact, click on the button 'Save' to save the changes or on the 'X' to cancel editing.

Note that the fields in the image might differ depending on your edition of the Attendant.

5.10.4 Deleting a contact

To delete a Shared contact, first search for the contact in the search box of the contact list and select the contact. Then click on the button 'Edit' in the contact information widget in F7.

A popup will open where you can edit the contact, but there will also be a trashcan button:

A confirmation message will be displayed, asking if you really want to delete this contact.

Click on "Yes" to confirm to delete the contact or click on "no" if you don't want to delete the contact.

5.11 Contact Sources

In addition to the standard Contact Sources, the Attendant supports displaying and filtering contacts from additional sources such as Excel files on a Sharepoint/OneDrive environment. These Contact Sources are managed within the Admin portal.
The contacts are visible to all users that have access to the contact source itself.

5.11.1 Filtering contact sources

The configured contact sources are shown together with other contact types, in the screenshot below the Queues. The administrator can set up a custom icon for them. On the above screenshot there are 2 external contact sources configured: Excel Contacts and Star Wars Contacts. Using the checkboxes, any combination of contact sources can be enabled or disabled.
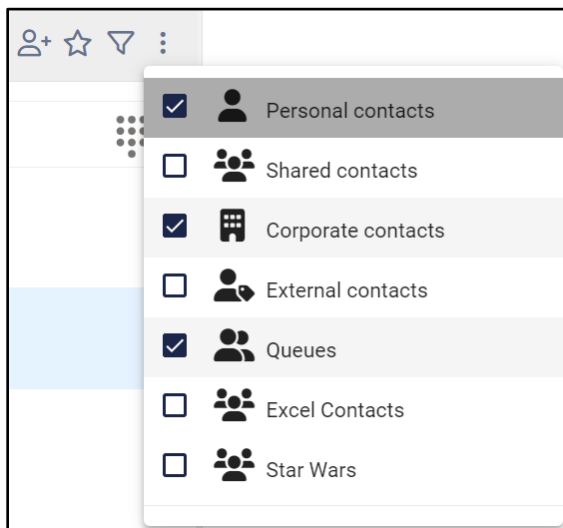
5.12 Sending an email to a contact

To send an email to a contact, press the email button in the contact list next to the person that you want to send the email to.
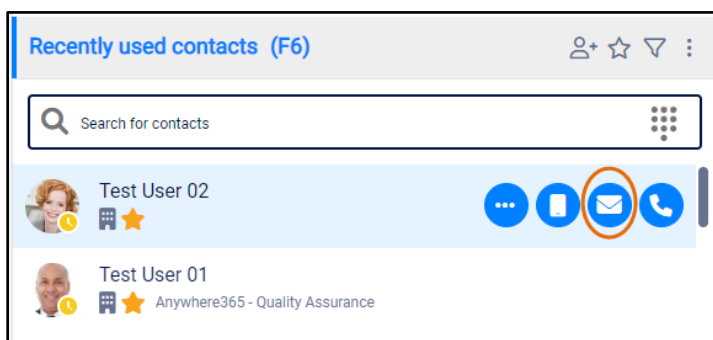
Then the send mail popup will be shown. Here you can enter your email.

The form contains the following fields:

Mail Template	There are one or more mail templates configured. Each can be in another language. The first one is used as default. The mail template can be changed in the pop-up of the email.
Callback number	When you have one or more active calls, you can select to which call this mail applies. See the screenshot below. Default the last selected call will be shown in the template.

Send from	The email address that will be used to send this email. This field cannot be edited in the Attendant. For changing this email address, see chapter [Global configuration]. Note that this field is not shown when this has not been configured in the global configuration.
Send to	The email address of the contact. This field is prefilled when the email address of the contact is known. Otherwise, you can enter an email address.
Subject	The subject of the mail. The subject will contain a predefined text with the data of the most recently selected call in the calls list (F2). You can change the text if needed.
Receive a copy	Check this if you want to receive a copy of the email in your own inbox. The email address that will receive a copy is shown next to the checkbox. If this field is not visible, please check if you have specified an email in your profile.
Message	The content of the mail. The message will contain a predefined text with the data of the most recently selected call in the calls list (F2). You can change the text if needed. The mail can be styled using the rich text functionality in that is available for the Message, you can use Bold, Italic, Underlined as well as some other options to style the text.

Press button 'Send' to send the mail.

To cancel the email, you can press the 'X' button in the top right corner or press the 'ESC' button.

5.12.1 Opening the email form in a new window

Suppose you are writing a mail, but suddenly you have to do something in the Attendant. Then you would like to close the mail popup and work on your mail later on. For this purpose the mail form has a pop out button:
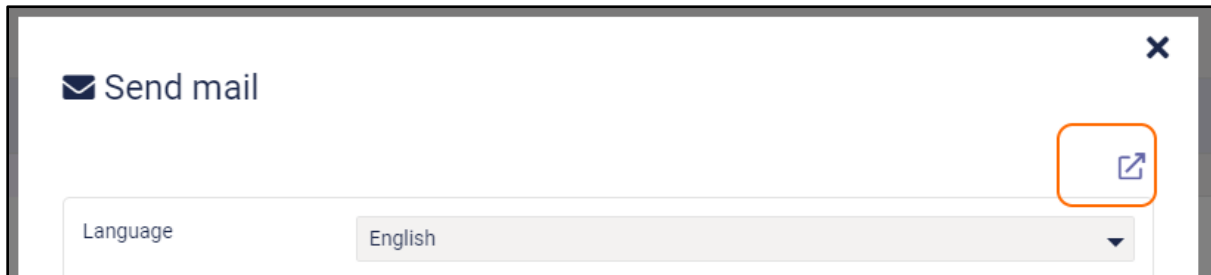
When you click on this button, the mail form will be opened in a new browser window.
Now you can switch between the browser windows to go to the Attendant and back to the mail form later on.

When you have sent the email in the pop out window, a message will be displayed that you can close that browser window now:
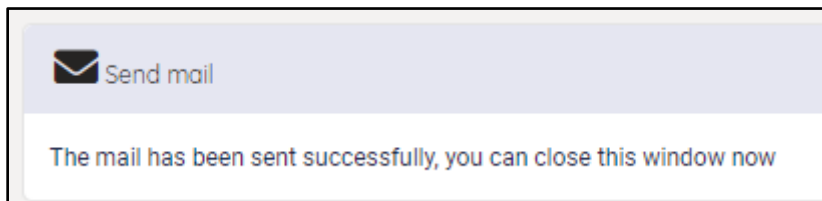
5.13 Making a contact note
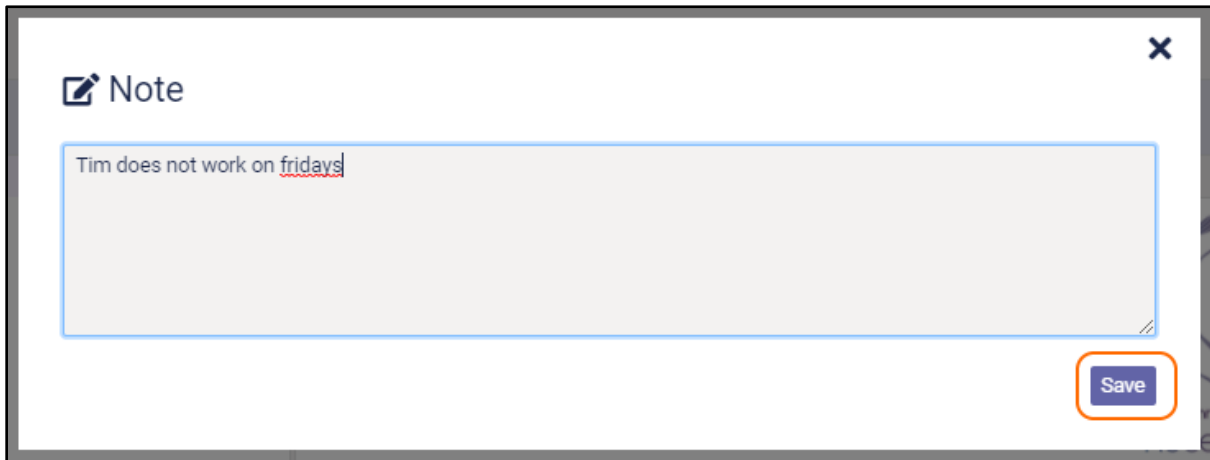
In F7 and F3 you can add a note to the selected contact by clicking on the 'Add note' button.
This feature is only available in the Premium edition.
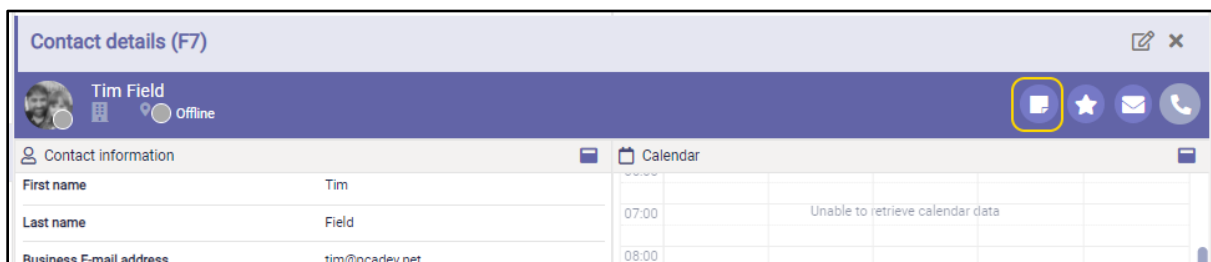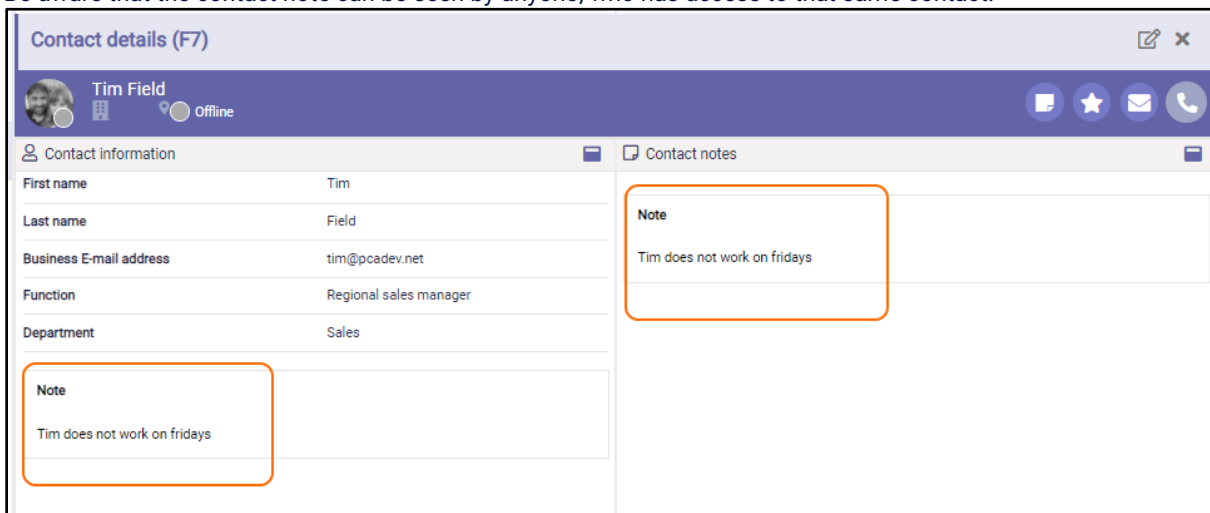
You can also use the 'Add note' button in the contacts list (F6)
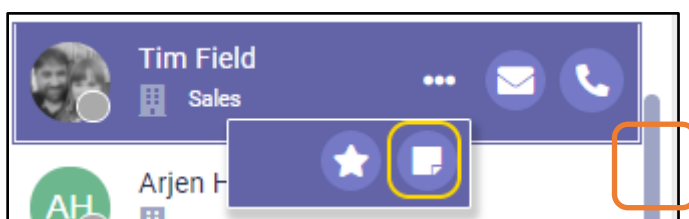
In the popup, you can enter the note. The notes can have a maximum of 1000 characters. Click on the 'Save' button, if you want to save the note. Click on the X button, if you want to exit the popup without saving the note.

Now, the note is shown in the contact notes widget and in the contact information widget.
Be aware that the contact note can be seen by anyone, who has access to that same contact.

Also, in the contact data in F6 and F7 it is indicated that there is a note for this contact. When you hover over this indication, you see the first 80 characters of the contact note.
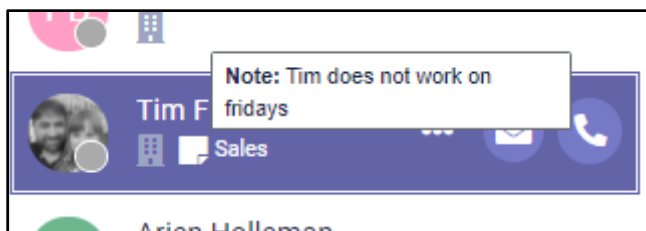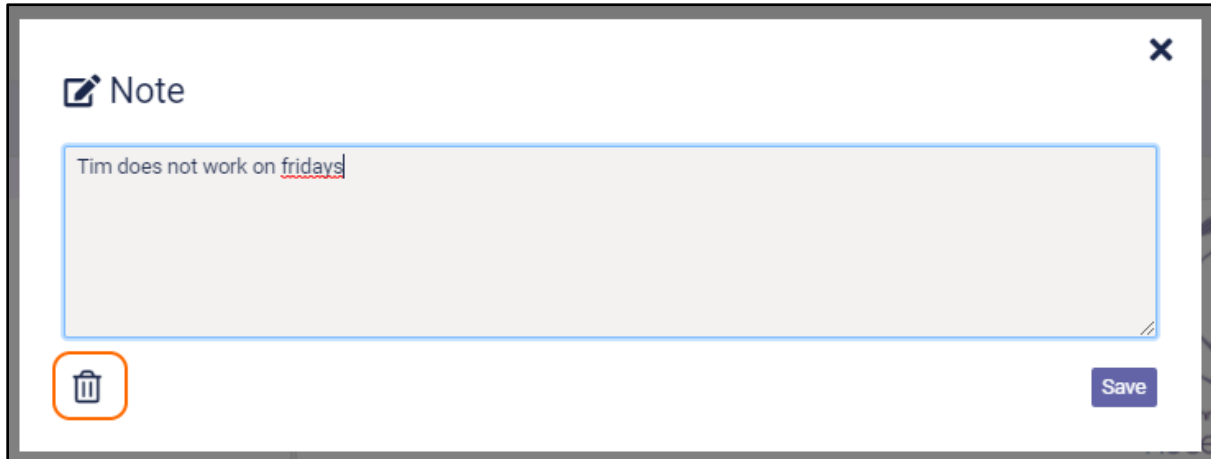
You can edit the contact note in different ways:

- Click on the 'Edit note' button

- Click on the 'Edit' button in the contact information widget. The button appears while hovering over the widget

- Click on the 'Edit' button 🗔 in the contact note widget. The button appears while hovering over the widget

In the popup, edit the note and click on the 'Save' button. If you don't want to save the changes, click on the X button.
If you want to delete the note, click on the trashcan button in the popup:
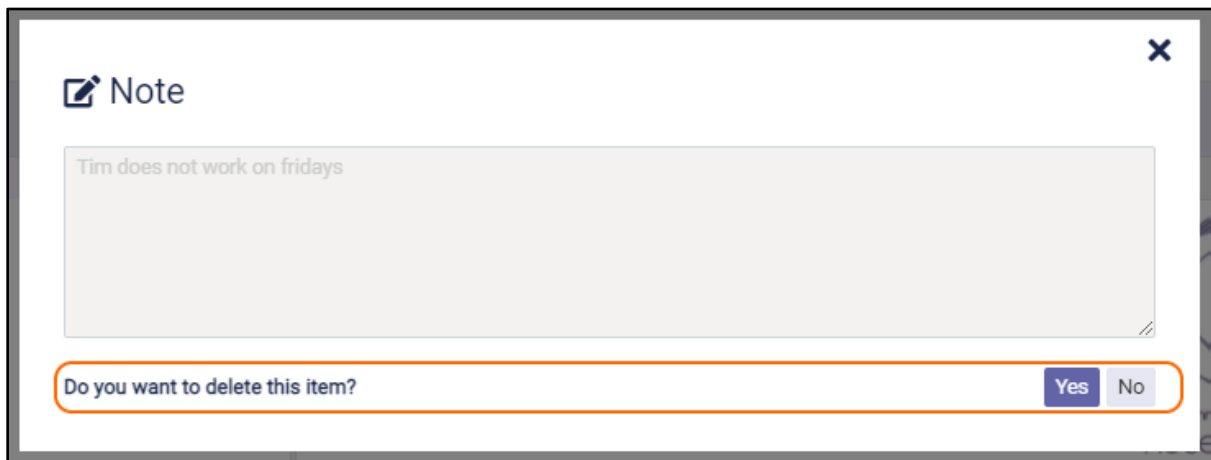
You will be asked if you want to delete the item. Then click on 'Yes'.

6 Call functionality

6.1 Connection with the server

When the Attendant is starting up a connection with the server, you will see the following line of text in the conversations screen:
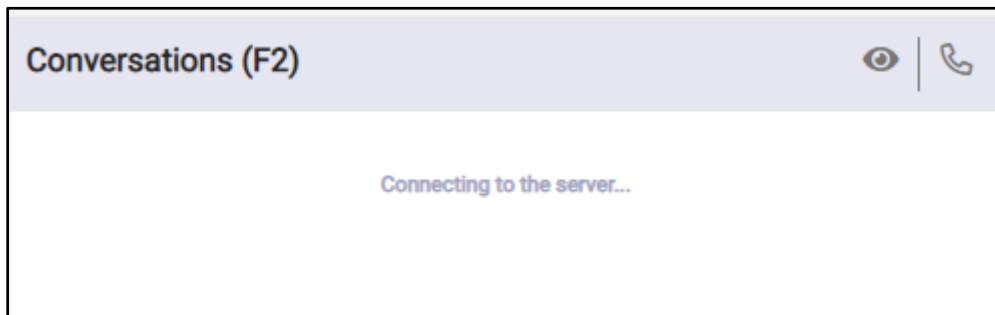
When it takes too long to connect, the text will become accented and a "retry" button will appear. The button mentions how long it will take before the next retry attempt will occur. If you want to retry earlier, you can click on the "retry" button.
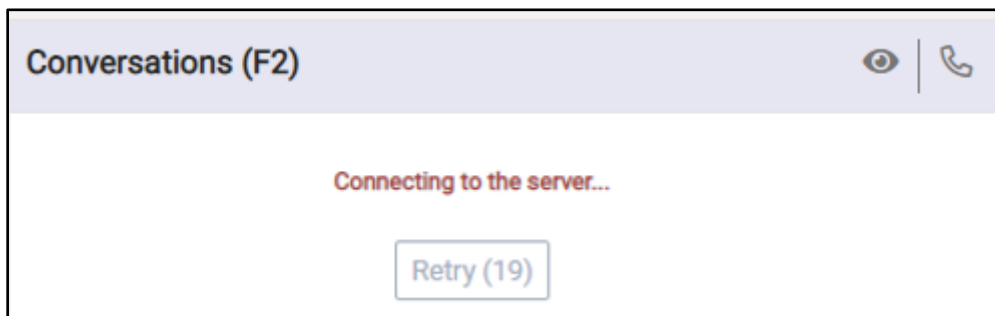
6.2 Call states, destination and call actions

In the screen below, there are three calls:

- A call on hold with Test User 03
- An active call with Test User 02
- An incoming call from Test User 04
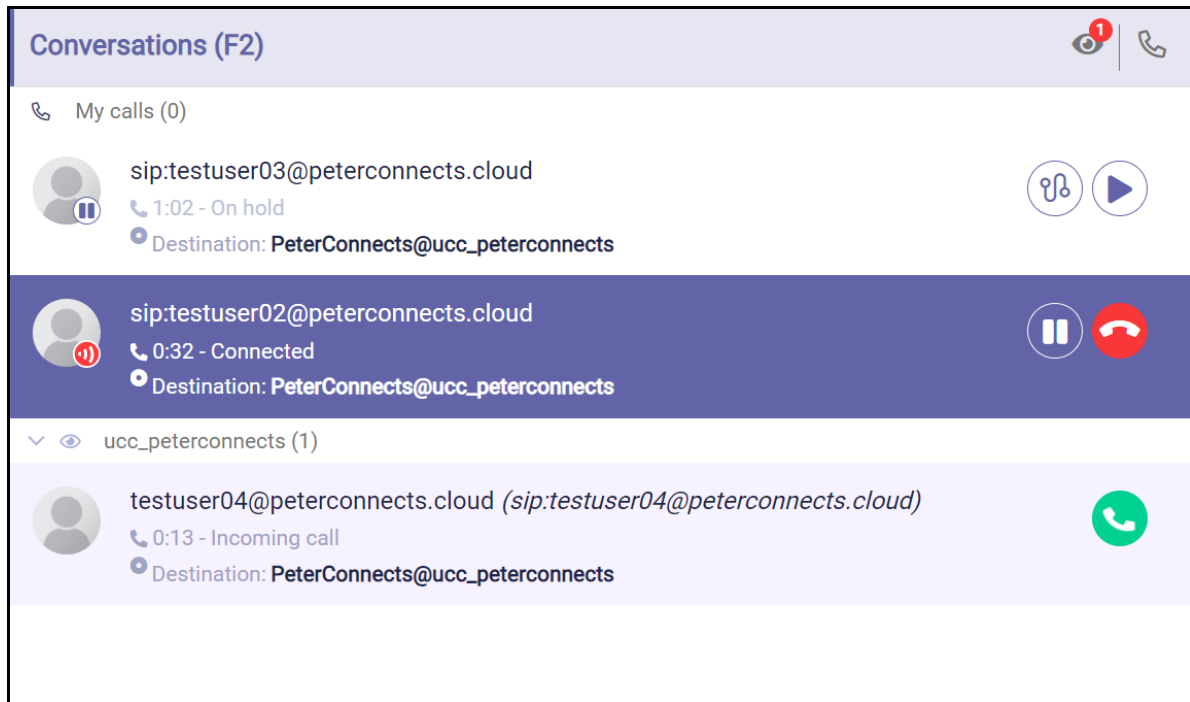
The following paragraphs describe the elements you can see in the calls in the Conversations (F2) panel.

6.2.1   Call states
The state of the calls is indicated in a small circle in the avatar of the other party.

	This is the active (connected) call
	This call is on hold
	The caller is hearing a pre-alert announcement

6.2.2   Destination information
A call can show the following information about the original destination of the call:

Destination:	This is the destination of the call
Fallback from:	This shows from which destination the call falls back into Conversations
Forward (always) from:	This is shown when somebody is calling to a contact, who has set his call forwarding to you or to the queue, that you have joined/monitored. Note that the forwarding information is only shown, when the call is in the My Calls section of the Conversation panel F2. In the parentheses you can see the reason of this forwarding:
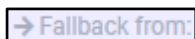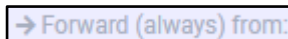
- Always: The call is always forwarded
- Busy: The call is forwarded when the agent is busy
- No answer: The call is forwarded in case of no answer
- Unavailable: The call is forwarded because the agent is unavailable

6.2.3   Call actions
Depending on the state of the call, you can perform the following actions:

Pick up the incoming call

Hang up the active call
Decline an incoming call

Transfer the call

Put the current call on hold

Retrieve a call from hold

6.2.4 Greyed out pickup button

When the attendant is only using a calling application and no physical device, the pickup button for an incoming call will show up as greyed out, indicating that the phone client should be used to pick up the call.

6.2.5 Force hang up calls

In exceptional cases, it can happen a call does not disappear after hanging up. The attendant can now force the call to be dropped using the CTRL + Delete keystroke. A popup is presented to confirm this action.

The standard 'Delete' keystroke to end a call only works when there is also a visible End call button. In case there is a call without a visible End call button, the attendant user can press the CTRL + Delete to remove the (non-existing, orphaned) call.

6.3   Transferring a call

There are several ways to transfer a call.

1. **Transfer an active call to a hold call (announced transfer)**

   When you have an active call and a call on hold, you can click on the transfer button [icon] to transfer the active call to the held call and during the wait time user can see a spinning hourglass icon.
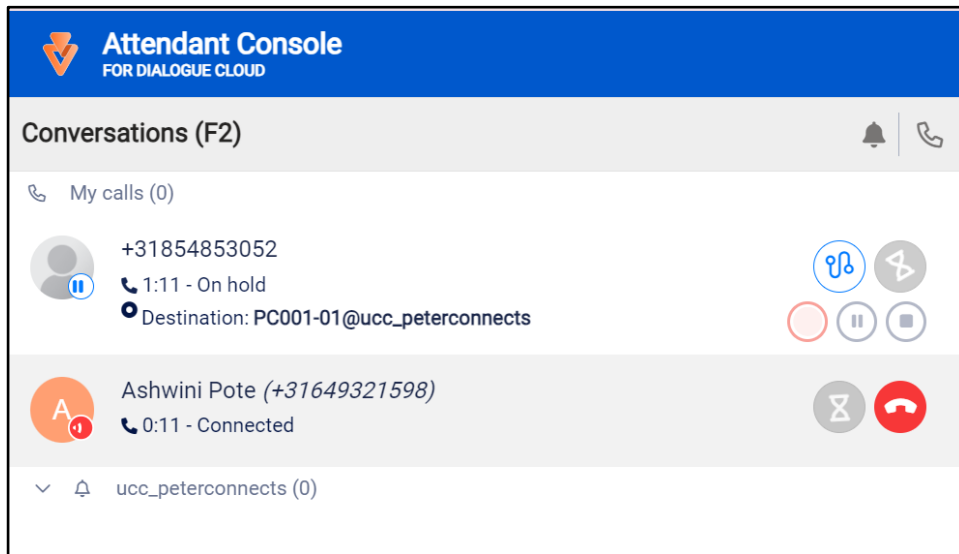
Note: it is also possible to do an announced transfer to a Teams queue.

2. **Transfer an active call directly to a contact (blind transfer)**
   When you have an active call, you can search in the contact list (F6) and transfer the call to that contact:
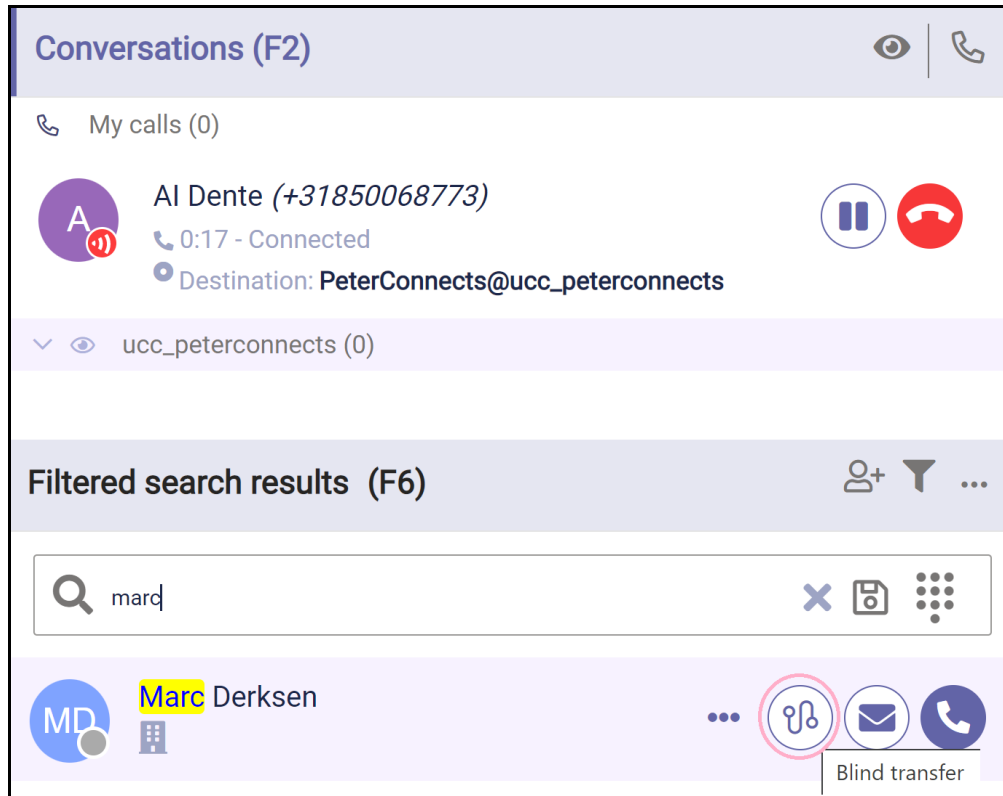
   "Drag and drop" a call to another call (announced transfer)
   When you have two calls, you can drag one call with your mouse to another call. When dragging, you will see dotted lines where you can drop the call.

   Note: it is also possible to do an announced transfer to a Teams queue.

3. **"Drag and drop" a call to a contact (blind transfer)**
   When you have an active call, you can drag that call to a person in the contact list (F6). When dragging, you will see dotted lines where you can drop the call.
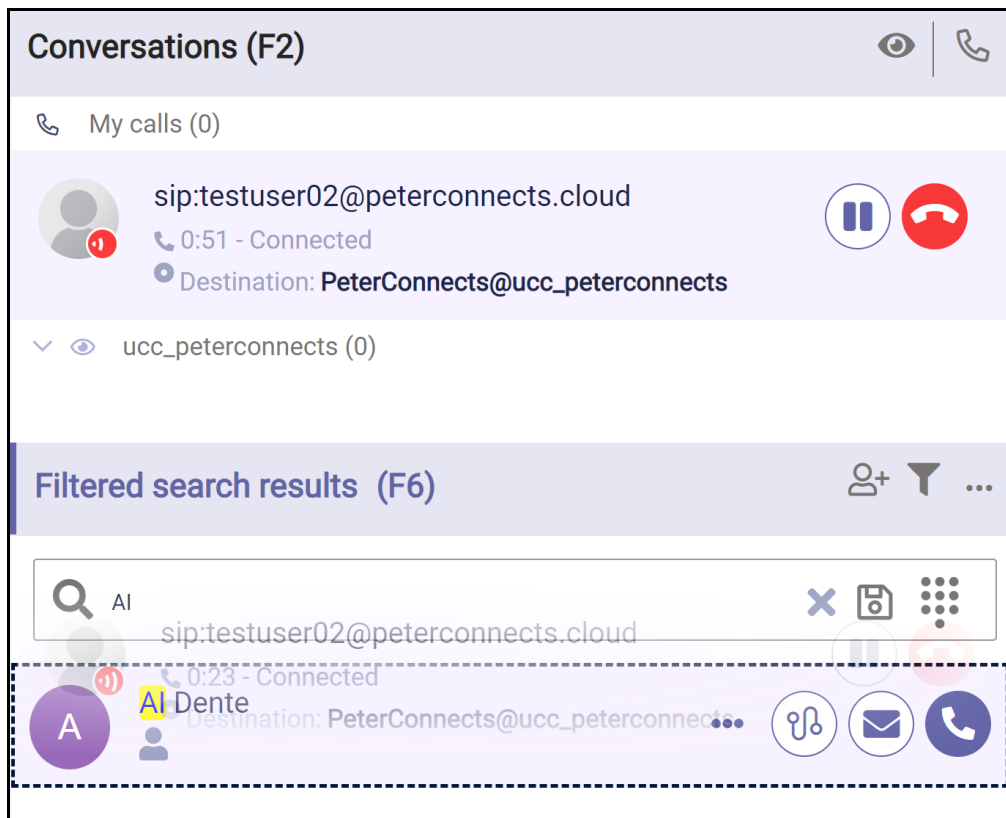
Note
During the transfer in My calls a spinning hourglass icon will show. If the transfer is unsuccessful after the timeout period, the "On Hold" button will reappear, enabling the operator to either attempt the transfer again to a different destination or resume the conversation with the caller.
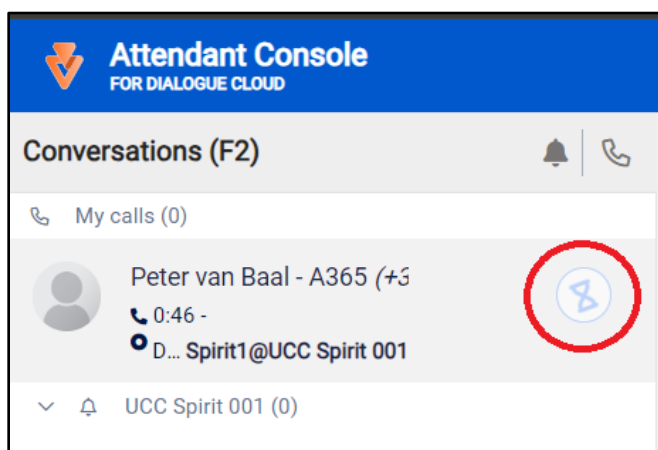
6.4   Call recording

Depending on your configuration you can have the option to record calls.

When this option is available and you are in a call, there is the possibility to record the call or fragments of the call.
When the call is connected, the recording is started up automatically.
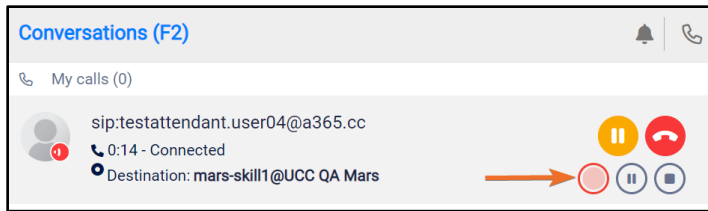
When the recording has started, the pause and stop button will appear too, and the recording button (disabled) will start flashing slowly, so you know that a recording is in progress.

Press the pause button to pause the recording. After pausing you can resume by clicking on the start button again.
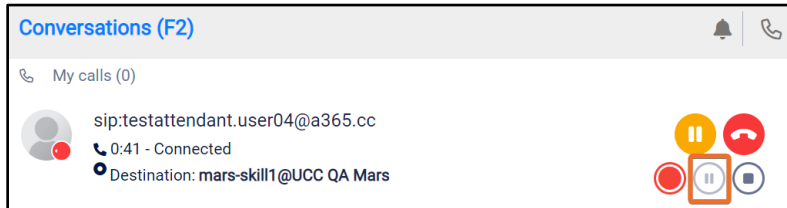
Click the stop button to stop the recording. After stopping the recording, the recording button, pause button and stop button will disappear from F2, so it's not possible to start a new recording.
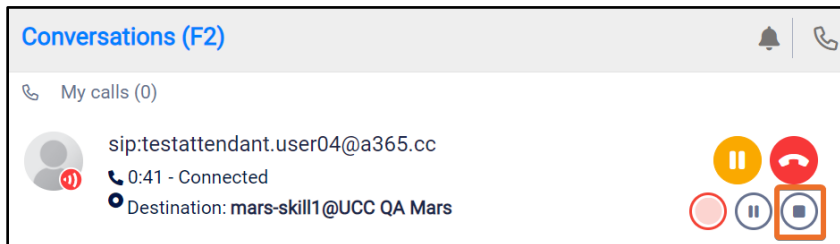
Setting requirements for call recording:

- *UseAudioRecording (on UCC settings) must be true*
- *AgentCanEditAudioRecording (on UCC settings) must be true*

6.5   Working with queue calls

When you have chosen to join or to monitor queues, the display of the calls will be different.

NB: For more information about joining and monitoring queues, see the paragraph about Queue Management in chapter [Personalizing the Attendant].

When you are assigned to join, the calls will be divided by headers:

- **A header named 'My calls'.** These are the calls that you make yourself, or are directly made to you.
- **A header for each joined queue**
- **A header for each monitored queue.** In the example above, it is the queue with the name 'ucc_peterconnects'

6.5.1 Answering an incoming queue call

When a call comes in on a queue, then you can click on the pickup button to accept the call:

Then the call will be moved to the 'my calls' section and will have a gray pickup button and a red hang up button:
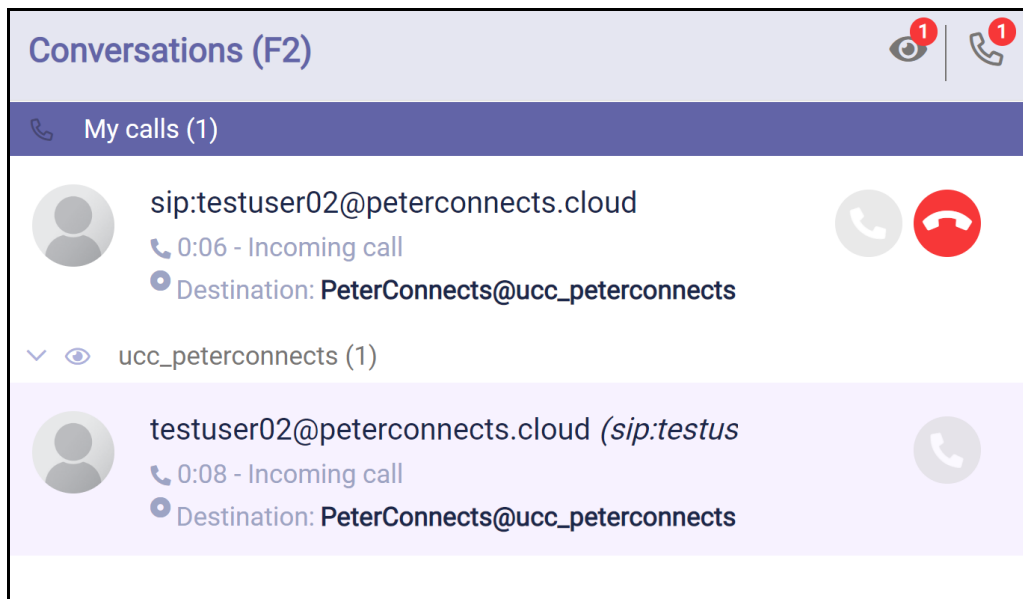
The call is now ringing in Teams and needs to be accepted in Teams. After this, you will be connected to the call, and the call will be shown as follows:
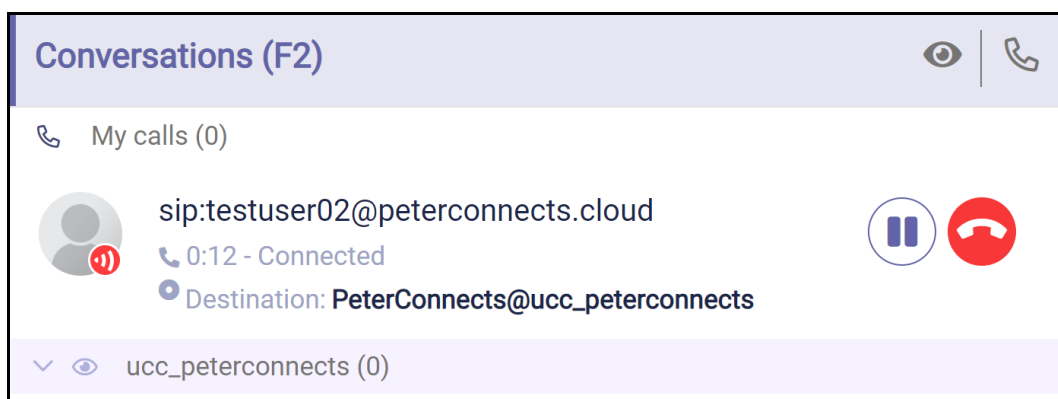
6.5.2   Toggling visibility of all monitored queues
You can toggle the visibility of all monitored queues simultaneously by clicking the eye icon in the F2 header.

6.5.3   Toggling visibility of a single queue
The calls in each queue can be made visible/invisible by clicking on the expand/collapse arrow in the queue header.
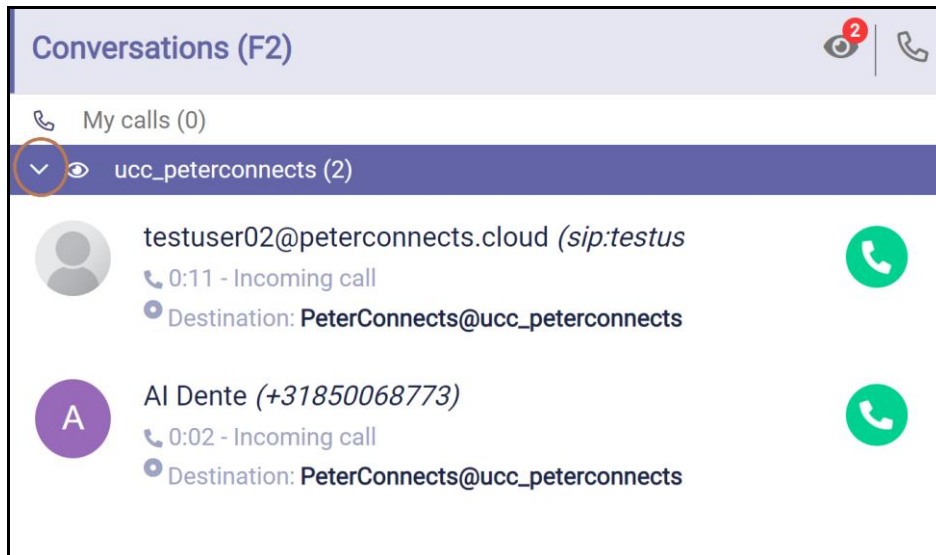
Collapsed it looks like this.
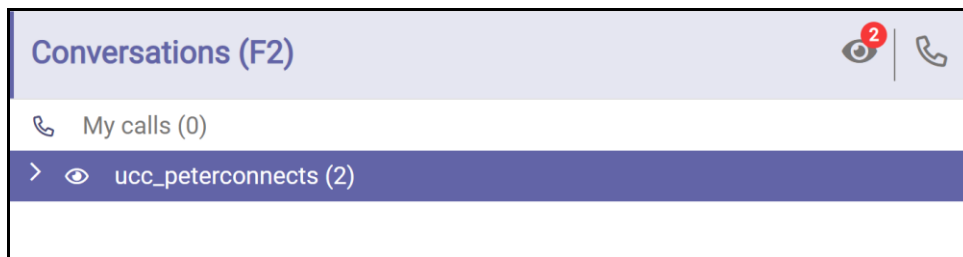
6.6   Calling or transferring to other numbers of a contact

6.6.1   Calling to other numbers of a contact
The contact information widget shows all phone numbers of a contact. For example the primary phone number, the mobile number etc.

The phone numbers are underlined to indicate that they are links. When you hover over a row that contains the phone number, a small dial button will appear. When you click on this dial button, a phone call will be made to that phone number.

When you click on the number itself, a pop-up will be shown, asking if you want to make a call to the specified phone number:
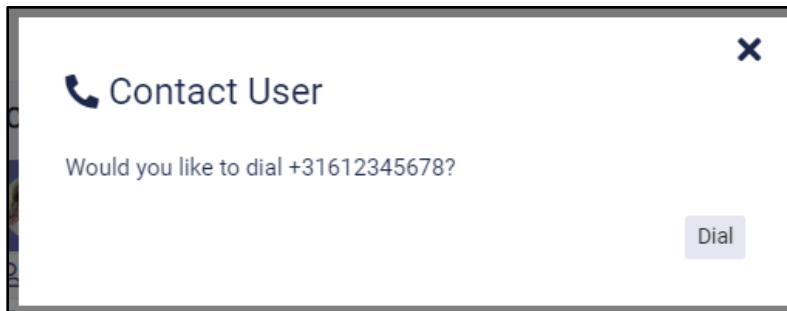
Press on 'Dial' if you want to make the call and on 'X' if you don't.

6.6.2   Transferring to other numbers of a contact

When you want to transfer a call to another number of a contact, you select that contact in the contact list and go to the contact information widget in the Contact Details. When you hover over a row that contains a phone number, a small transfer button will appear. When you click on this transfer button, the call will be transferred to that phone number.

When you click on the number itself, a pop-up will be shown, asking if you want to make a call or a transfer to the specified phone number:

Press on 'Dial' if you want to make the call, on 'Transfer' if you want to transfer the call and on 'X' if you want to do nothing.

7   Attendant status

7.1   Presence

In the right top corner of the Attendant you can see your own states. Default you will only see your presence state:
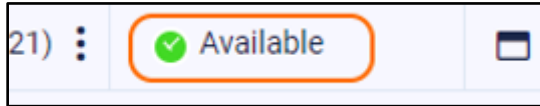
7.2   Do not disturb

When you have "Do not disturb" switched on, it will be indicated by the do not disturb sign as follows:
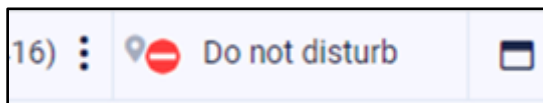
Note: When your status in Teams is DND (Do Not Disturb), it is not possible to start or accept calls. In that case you will get a warning message:
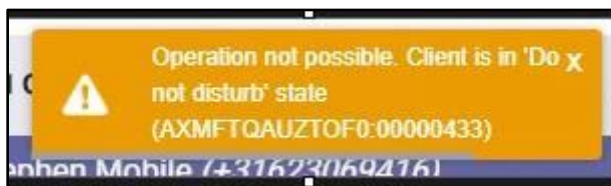
7.3   Reason codes

Selecting a reason code from a list of states predefined at the UCC are a way to provide more detailed presence information. When a reason code is set, the corresponding presence status (Busy or Away) will be automatically updated.
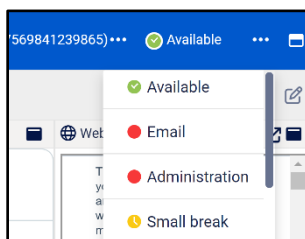
The UCC that provides the reason code options must be selected in Preferences/Queues before it can be used:
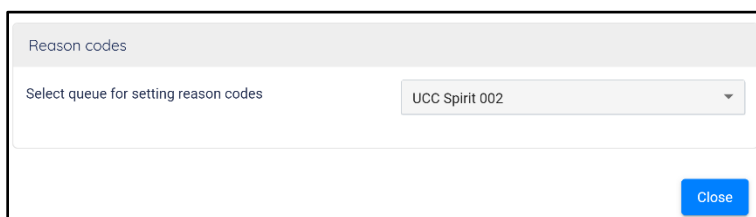
8 Personalizing the Attendant

You can open the "Preferences" dialog from the menu bar:
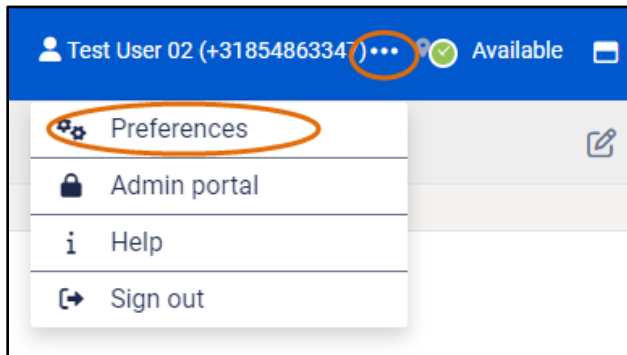
In the preferences dialog, there are several tab pages on which you can set your own personal preferences. These tab pages will be described in the next paragraphs.

8.1 Interface preferences

In the preferences dialog, on the Interface tab, you can select a layout, a theme, the date and time format, some notification settings, use of the Teams Desktop integration and the language:
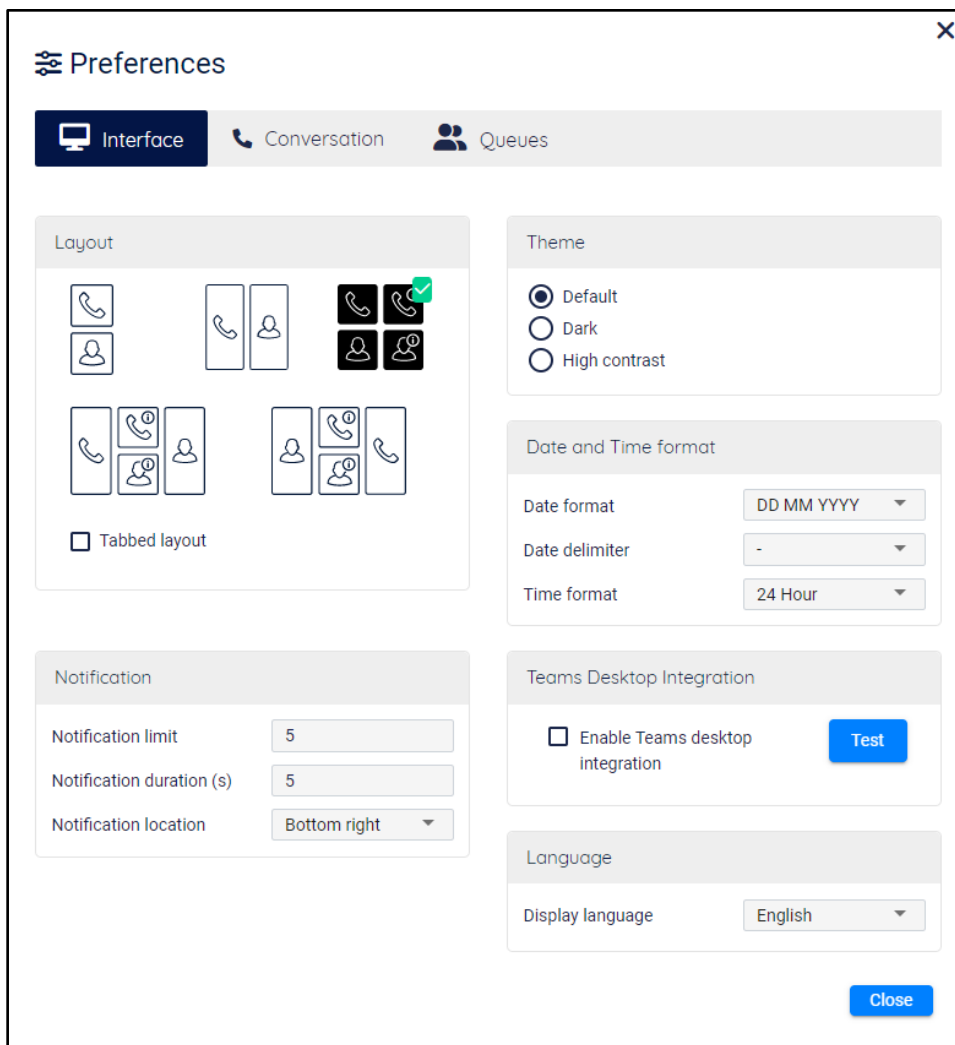
Layout

There are currently five layouts to be chosen, ranging from one to three columns. In these layout settings, the icons mean the following:

 = Conversation area (F2)

 = Conversation detail area (F3)

 = Contact list (F6)

 = Contact detail area (F7)

There is also an option for the tabbed layout. In this case, the Homepage, Conversation details and Contact details are displayed in tabs.
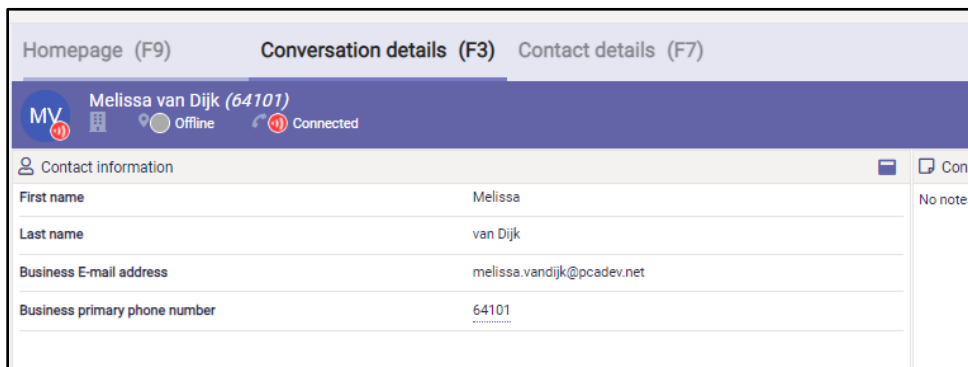
Theme

You can also select a theme: The default theme is shown from the start. The High Contrast theme can be used when you have difficulty seeing contrast. The Dark theme can be selected if you prefer a less bright screen.

Note that the Theme selection is only available in a standalone version of the Attendant.

Date and time format

The way that dates and times are shown can be customized by selecting the wanted date and time format and the date delimiter.

Notification

On the bottom of this screen you can select a location for popup notification messages and how many you will get maximum at one time. A notification can look like this:
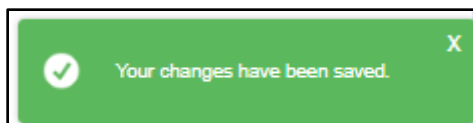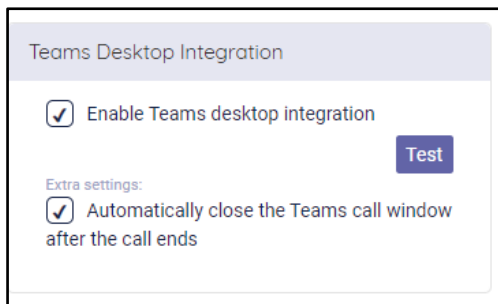
Teams Desktop integration

The usage of the external application called 'Teams Desktop integration' can be configured. This application reduces the actions the user had to perform in the Teams application. Main functionality is picking up calls, without having to accept the call in Teams as well.
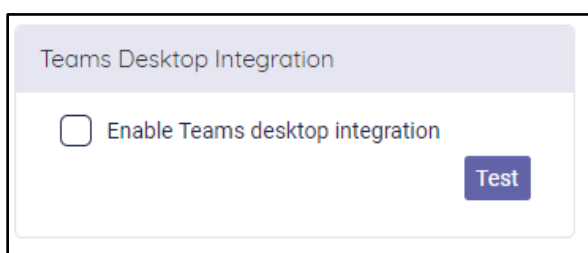
When checking 'Enable Teams desktop integration' an additional checkbox shows. When unchecking this second checkbox, Teams windows used for the calling will not be closed automatically after the call. So preferably leave this on checked.
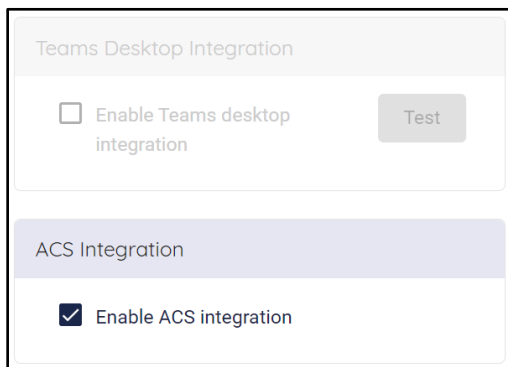
Note: The Desktop integrator only works with the Classic Teams client. As this Teams client version is not available anymore to most Teams users, the Desktop Integrator option will be removed in a new version of the Attendant Console.

For more information on the Teams Desktop integration, see
https://product.attendant.anywhere365.io/attendant-console-desktop-integrator/

ACS Integration
The usage of Azure Communication Services called "ACS" can be configured. With ACS, calls will be handled in the Attendant Console itself and not in Teams. With activating ACS, the actions the user has to perform to handle calls will be reduced. Having ACS activated will not change the call handling itself, but will have impact on audio settings. Audio of the conversations will need to be configured in the computer audio settings.
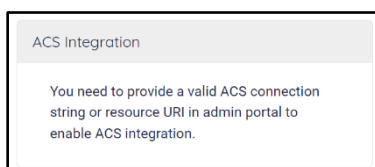
When ACS is enabled Teams desktop integration can't be used and vice versa. The ACS checkbox in the preferences will only be visible if the admin has provided a valid ACS connection string or resource URI in Admin Portal.

Note: Users who already had ACS enabled in the preferences before this update, that turn out not to have a valid ACS connection string or resource URI, will only be able to disable ACS. If they want to enable it again they need to provide a valid ACS connection string or Resource URI in Admin Portal.

Language
You can set the display language to English, Dutch, French, German, Spanish and Danish.

8.2 Conversation settings

On the tab "Conversation" you can configure some settings, that have to do with telephone conversations. The settings are described in the following paragraphs.

8.2.1 Calling Identity

In this section you can select which 'Caller ID' has to be used for making outbound calls. You can select only one 'Caller-ID' from the drop down. After saving the selection you are able to make outbound calls.

Remark: making outbound calls also requires a configuration to be correct in the Azure account. Contact your administrator in case after the configuration of the Calling Identity, you still cannot make outbound calls.

8.2.2 Audio Alerting

in this section you can set audio alerting. When audio alerting has been set, an audio signal is played when a new call comes in. The type of alerting sound can be chosen and can be different for queue calls and my calls. It is also possible to suppress alerts when you are in a call, using the checkbox 'Suppress alerts when in a call'.

An alternative audio output can be set as the 2nd ringer device. Which is especially convenient when using ACS. The "Test second ringer" will test the audio which is set for "My Calls". Setting the "2nd ringer device" to "None" will play all audio (voice and ringer) on the selected audio output of your computer.

Note

Be aware that additional consent needs to be provided to your browser to get access to the microphone when opening the preferences.
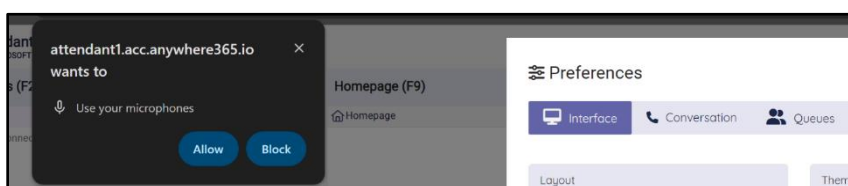
After that it will show red notification the browser tab showing that you audio being set the attendant.
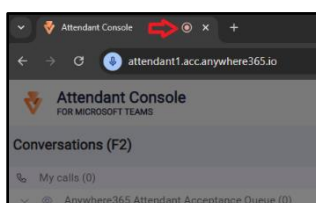
8.2.3   Calling timeout

In the section "Calling timeout" you can set the amount of seconds for the on hold timeout. When the on hold time of a call exceeds the amount of set seconds, the line of the call that shows the on hold time and status starts blinking.
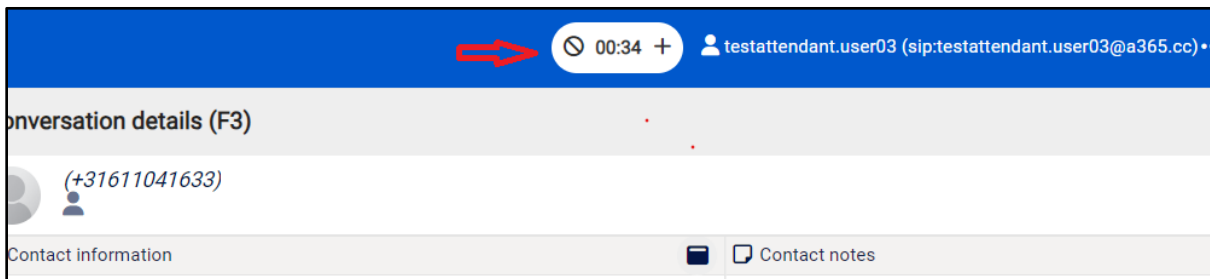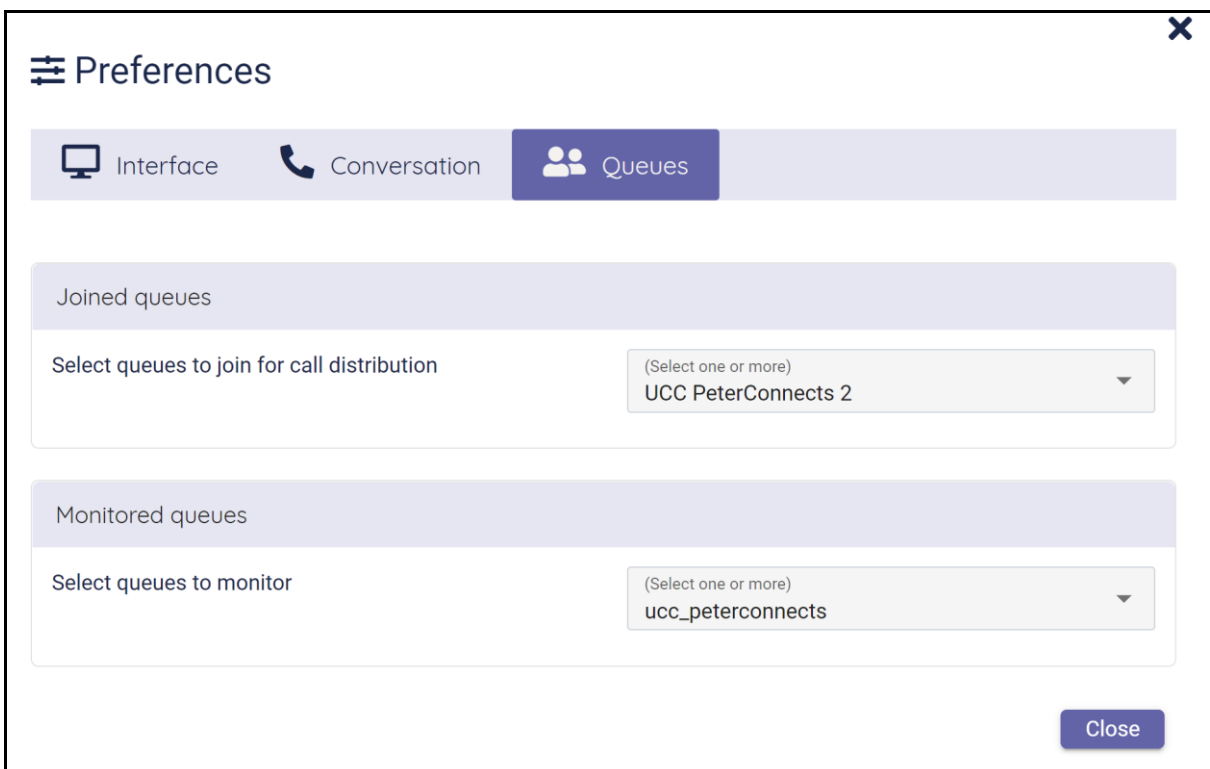
8.2.4   Wrap-up time

When configured, after each call, the wrap-up time will be displayed in the Attendant Console, allowing you to extend the wrap-up period by clicking on the "+" button or reset it to be ready for the next call. During the wrap-up period no calls will be distributed to the operator.

During Wrap-up Time, the operator can see a timer on their screen indicating the remaining time before they're allowed to accept another call. If the operator needs more time, they can extend the Wrap-up Time by clicking the "+" button. Each click adds 10 seconds to the remaining time.

8.3   Queue management

8.3.1   Joined queues

To add a queue to join, open the drop-down box (with the arrow pointing down) and check which queues you want to join. To remove a queue, click on the X behind the queue or uncheck the queue.

When you have selected a queue to join, phone calls on that queue will also ring directly on your phone, when it is dispatched to you.

Some queues might be preselected for you by an administrator. These will be displayed as "Queues preselected for call distribution".

Note: Logging out the attendant console won't mean that you are automatically logged out of the "joined queues/UCC". You still can receive calls on Teams until you have deselected the queues, unless you activate the option "Unjoin queues after closing or logging off Attendant". This will sign you out of the UCC's while you're signed out of the Attendant and rejoin when you sign back on.

Joined queues
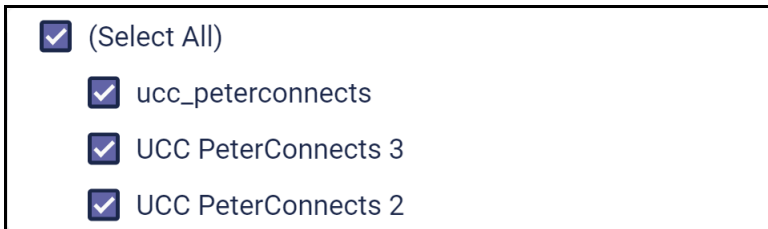
Select queues to join for call distribution 👥   (Select one or more)
                                                        (Select All), UCC Spirit 002   ▾

☑ Unjoin queues after closing or logging off Attendant

8.3.2   Queues to monitor

With a similar drop down as for selecting joined queues, you can also select which queues you want to monitor.

☑ (Select All)
  ☑ ucc_peterconnects
  ☑ UCC PeterConnects 3
  ☑ UCC PeterConnects 2

Note: When you have chosen to monitor a queue, but you have not joined it, phone calls on that queue will only be visible in your Attendant application.

8.3.3 Dynamic queue ordering
An option in the preferences is added to enable dynamic queue ordering in F2. There are 2 options:

- Default: no change in existing behavior, so no dynamic sorting
- Sort queues dynamically

Business rules:
- Joined Queues are always shown above the Monitored queues
- Longest ringing call in a joined queue will show on top.
- Longest ringing call in a monitored queue will show on top of the monitored queues list.

For the receptionist user it looks like this. No calls:

Call on Joined queue 'Sales department queue', queue moves to top.
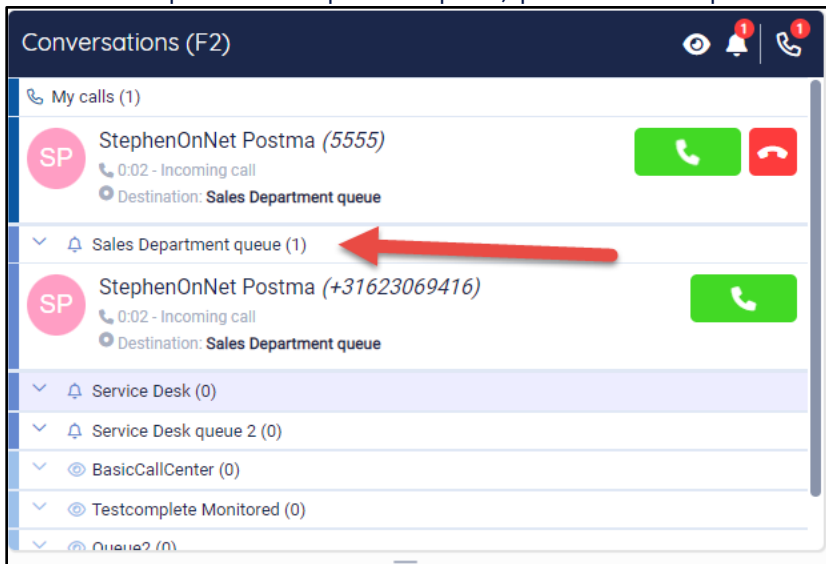
Call incoming on Monitored queue 'Primary Queue 58', queue moves to top of monitored queues
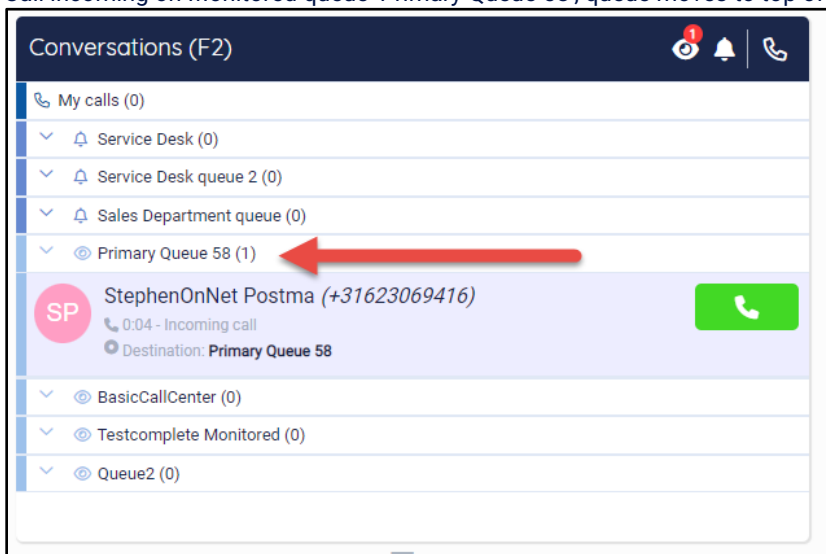
8.4   ACS Integration

With ACS (Azure Communication Services) calls will be handled in the Attendant Console and not in Teams. This doesn't change anything in the handling of queue calls and outbound calls initiated from the Attendant Console.

Audio
Because of ACS Teams is not being used to handle the calls the default audio (device) settings on the computer will be used.

Presence
The presence in Teams will be set to "Busy on a Call" when an agent is handling a call in the Attendant Console (having a call in My Calls). When not being active in handling a call, the presence of the agent will show as set in Teams based on the agent's actual presence.
When setting the presence in Teams manually to a certain presence state it will overrule any other presence set and therefore will also overrule presence set by having a call in "My Calls".
The "Reset status" in Teams will help to get the actual presence status back.

Teams
Although Teams is not being used for handling calls when having ACS activated, it is to be advised to still have the Teams application active for handling personal (direct) calls, chatting, participating in meetings and using other functionality Teams provides.

Prerequisites
To be able to use ACS, the admin consent of the Attendant Console needs to be renewed and a connection string needs to be created and added to the Admin portal. See paragraph **Error! Reference source not found.**. for more information.

9 Keyboard navigation

The Attendant allows keyboard navigation via shortcut keys. This will help keyboard centric operators to operate faster.

The shortcuts are shown in the Help menu:

10 Widgets

The detail areas of the Attendant (and the homepage as well) contains widgets. These are small application parts that operate on either the currently selected conversation or the currently selected contact.

10.1 Maximizing and restoring

You can maximize a widget within its containing panel by clicking on the maximize button:
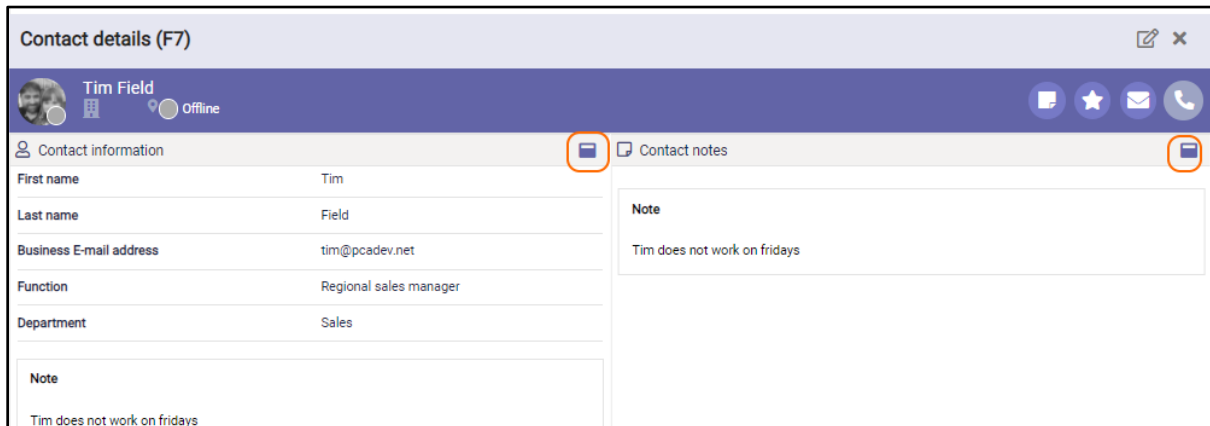
And you can restore the widget again by clicking on the minimize button:
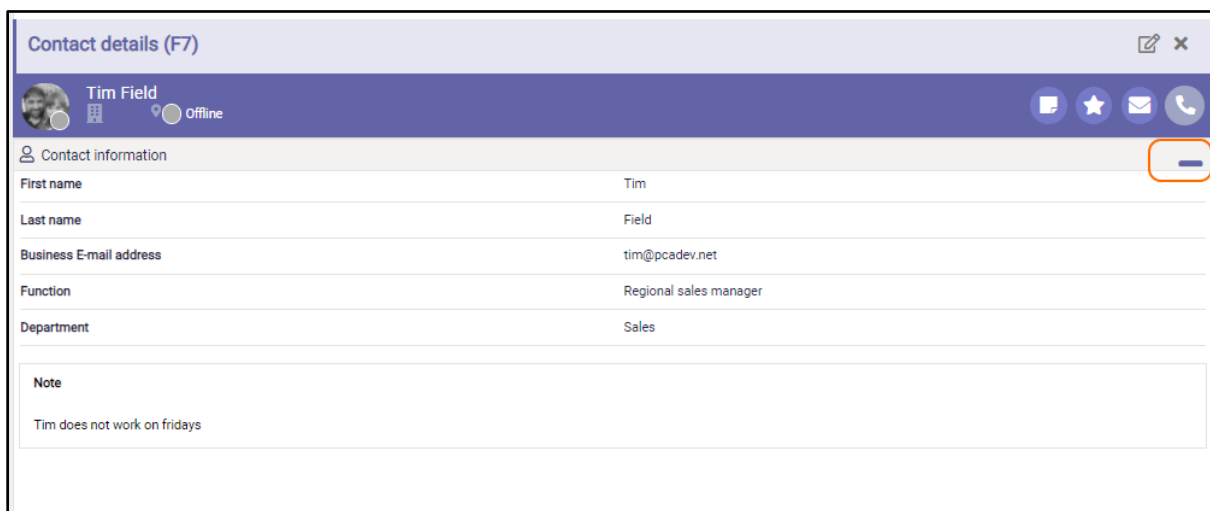
Note that the maximize button is not shown when there is only one widget in the panel, because when there is only one widget, it is already maximized to the contents of the panel.

10.2 Moving the widgets around

When you want to change the layout of the widgets, you can click on the 'Edit widgets' button. The widgets become editable and you can drag and drop them and resize them. The widgets are positioned on a grid that becomes visible when dragging / resizing:
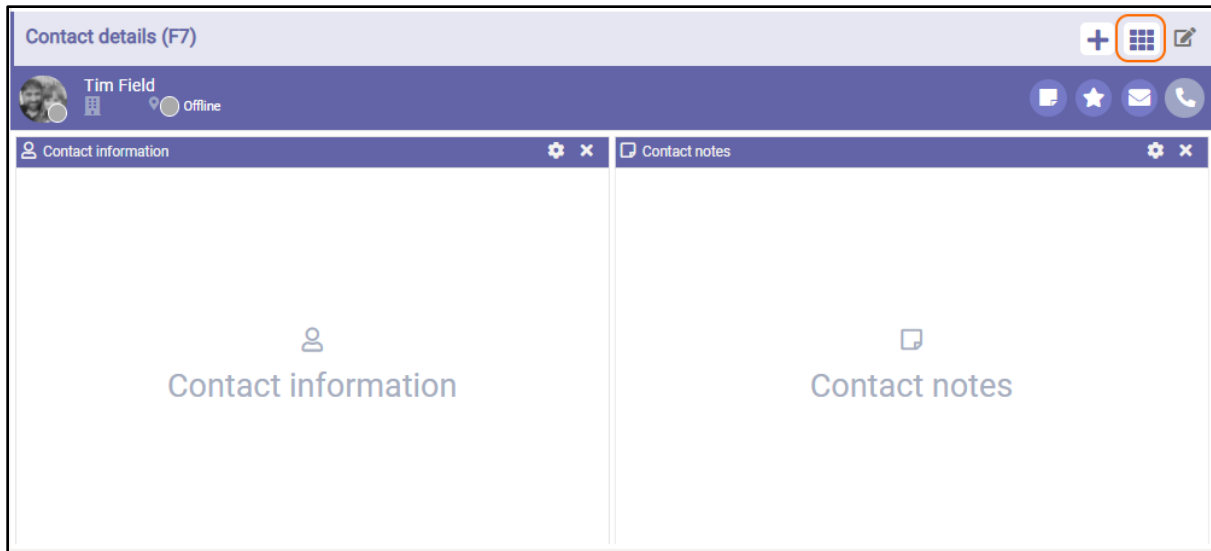
The widgets will automatically snap to the closest line on the grid. You can give the widgets any size and position.

You can automatically organize the widgets again by clicking on the 'Arrange widgets' button.

You can remove a widget by clicking on the 'X' (Remove widget) in the title bar of the widget.

You can stop editing the widget by clicking on the 'Stop editing' button.

Note that the content of the widgets is not shown in edit mode. The content will be shown again when you stop editing the widgets.

10.3 Adding a widget

In the edit modus of the widgets, click on the button 'Add a widget':

Then the widget library will be shown, where you can select a widget:

Note: *The actual widgets that are available to you might be different than the ones displayed below. This image is just for demo purposes.*
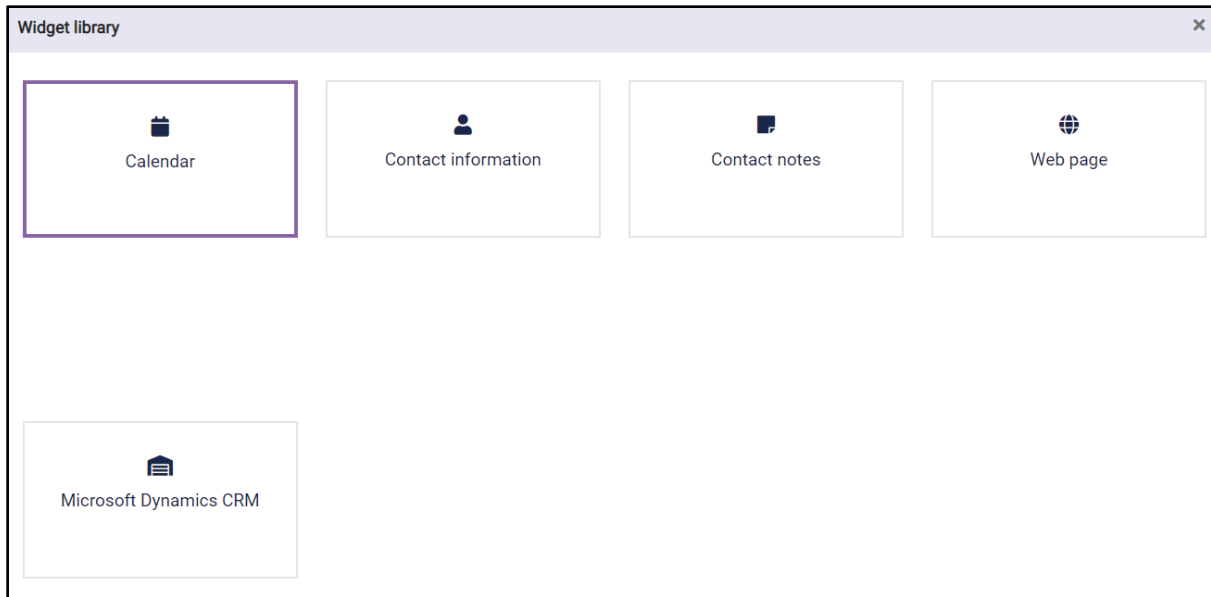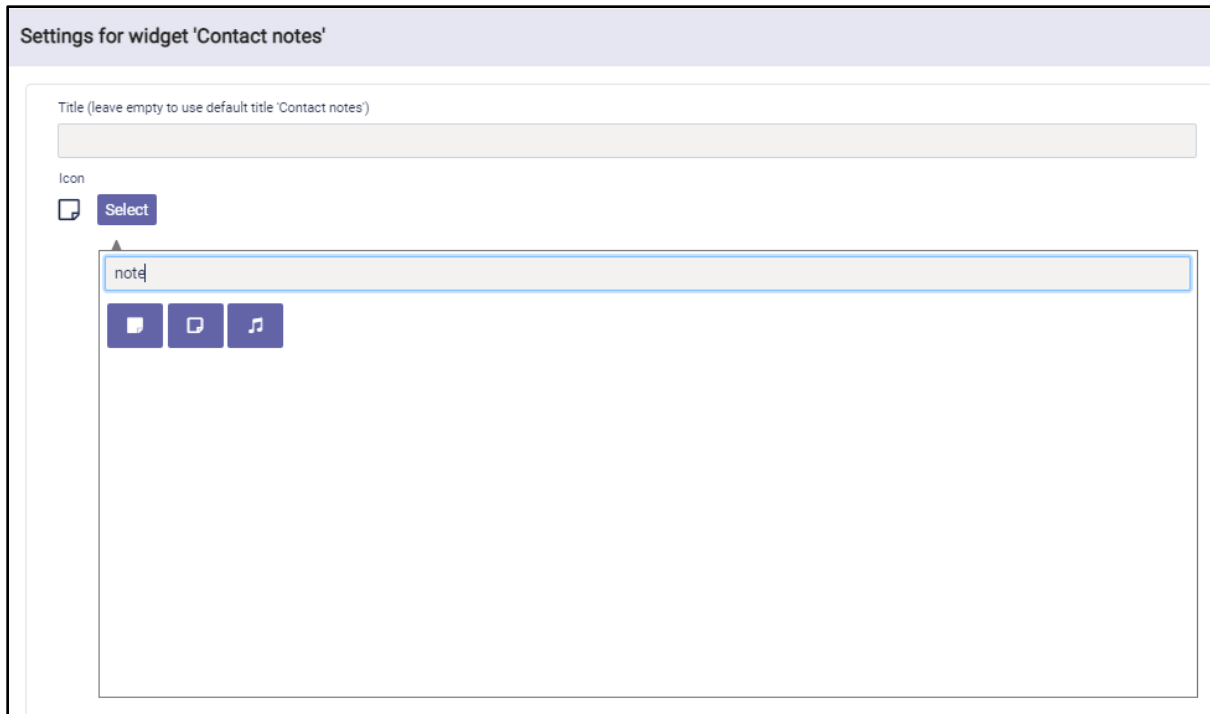
Select a widget and click on the button "Add". After adding a widget, you can configure it.
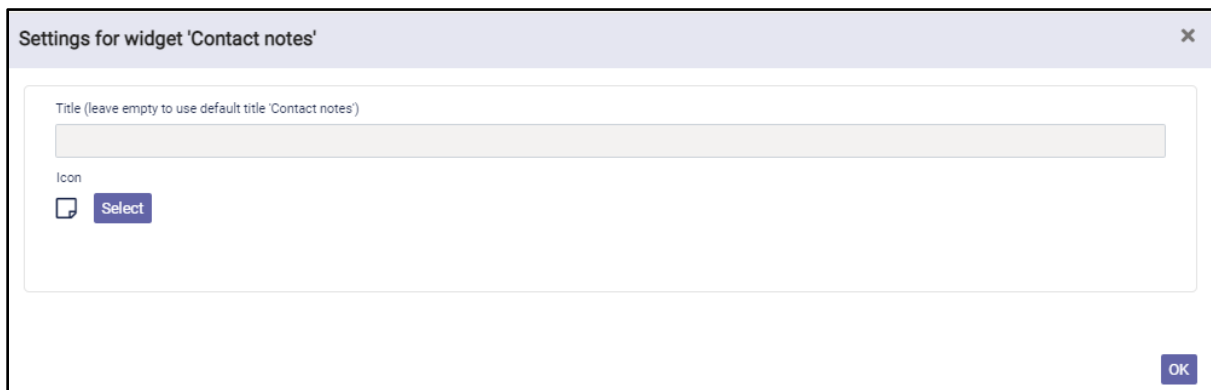
At least you can edit the title and the icon. The title is not mandatory. If you leave the title empty, the default title will be used. This default title will also automatically be translated, when you select another language via 'Preferences'. When you do enter a title, that title will override the default title and will not automatically be translated, when another language is selected.

If you want to change the icon, you can click on the 'Select' button to show the icon selector. Then you can search for a specific icon, for example 'note'.

The icon search is only available in English, because the icons are coming from a public library named 'Font Awesome'.

Some widgets require more configuration. Those will be described in the next paragraph.

Click on 'OK' to add the widget. Click on 'X' to exit the settings screen.

You can change the configuration of widgets that had already been added by clicking on the 'Configure widget' button .

Exit the editing of the widgets by clicking on the 'Stop editing' button .

10.4 URL Placeholders for widgets

Widgets that need a URL can have placeholders. These placeholders will be used by the Attendant to provide the target data provider with extra request data. The placeholders are:

[CLI]   This placeholder stands for "Calling Line Identification". This is the phone number of the person that is calling.

[EMAIL]   The Attendant uses this tag as placeholder for the email-address of the currently selected person. For example, if a call is selected and the email address of the calling person is known, the email placeholder will be filled with that email address. If the email address is not available, an empty string will be used.

[LANG]   This tag will be placeholder for the currently selected language in the Attendant. The following placeholders are provided:
                en = English,
                fr = French,
                nl = Dutch,
                de = German,
                es = Spanish,

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da = Danish
it = Italian

[THEME]   (Only for the Webpage widget) This placeholder will be replaced with the name of the current
                 theme, e.g. standard, dark, high contrast.

[DESTINATION]   (Only for the Webpage widget) This tag provides information about the called destination.

[CONTEXT]   (Only for the Webpage widget) This tag provides information about the caller and the user of
                 the Attendant.

10.4.1 Calendar widget

This widget shows the calendar information for a contact, when the calendar has been configured by your administrator. This widget is only available in the Premium edition.

The days of the week, that have to be displayed in the calendar in the week view mode, can be chosen in the configuration of the widget.

Days shown in the week view
- ☐ Sunday
- ☑ Monday
- ☑ Tuesday
- ☑ Wednesday
- ☑ Thursday
- ☑ Friday
- ☐ Saturday

10.4.2 Contact information widget

This widget shows the basic contact information for the selected contact. Note that for contacts from some platforms, "extension" is displayed as "primary phone number" in the widget and "number" as "alternative phone number". When there is no extension, the number is displayed as primary phone number in the widget.

In the configuration it can be indicated, whether the contact notes should be displayed in this widget or not.

Settings for widget 'Contact information'

Title (leave empty to use default title 'Contact information')

Icon
👤 Select

Contact information options
☑ Display contact notes

10.4.3 Contact note widget

With this widget, you can read and edit contact notes. Be aware that the contact note can be seen by anyone who has access to the same contact. This widget is only available in the Premium edition.

10.4.4 Homepage widget

This widget is shown on the homepage screen, when the Attendant is just started up.

10.4.5 Microsoft Dynamics CRM widget

This widget serves the Attendant with content from the Microsoft Dynamics CRM.
This widget has to be put on the Conversation details panel (F3).

For this widget, the following configuration is requested:

Title	Optional title, just like every other widget
Icon	Optional other icon, just like every other widget
Dynamics domain	The domain that you are using, for example MyCompany
Dynamics region	The region that you are using, for example crm4.dynamics.com
Dynamics version	The version of you dynamics system, defaulted at 9.0
Widget	Using the drop down box, you can select which type of information you want to see in the widget. For example 'Invoices' or 'Opportunities'

Headers	Depending on the selected information type in 'Widget', you can select the headers you want to see

Note that you have to click 'Edit' in order to edit the individual configuration parts and that you have to click 'Save' to save the individual configuration parts.

To use this widget in the Attendant, you have to be logged in in the Microsoft Dynamics CRM via this widget. When you are not signed in yet, the widget will show a Microsoft login window.

After you signed in, you are able to see information in the Microsoft Dynamics CRM widget. To see this information, you have to select the caller in the Conversations panel (F2), so the caller will be visible in the Conversation details panel (F3). For example, when you click on a call and you selected information type 'Invoices' in the configuration of the widget, you will see the invoices of the company of the caller:

🏠 MyCompany CRM widget						📁
Dimension						**Sign out**
NumberStatus	**Name**	**Description**	**Amount**	**Date**	**Due date**	
Active						
181… New	Support		€ 1.932,80	2018/12/24	None specif…	
181… New	Support		€ 1.932,80	2018/12/24	None specif…	
181… Booked (re…	Support		€ 1.812,00	2018/12/24	None specif…	

When you click on any of the invoices in the widget, a new browser tab will be opened, where you view the information in the Microsoft Dynamics CRM itself.

Note: For connecting to the Microsoft Dynamics CRM from the Attendant, an administrator has to give admin consent. This is described in the chapter 'Global configuration'

10.4.6 Web Page widget

By inserting a Web Page widget, you can embed an external website into the Attendant. For example, a page of a corporate website. This feature is only available in the Premium edition.

When inserting the Web Page widget, you can enter a URL of the page to embed:

In the frame options, it can be configured whether the border of the widget and/or the scrollbar of the page should be visible.

Technical notes:
- The URL is mandatory. When you enter a url without a prefix ('http://', 'https://', or 'ftp://'), the prefix 'https://' will be added automatically when you save the configuration.
- The URL can contain the placeholders [EMAIL] and [LANG]. The placeholders are described in paragraph "URL placeholders for widgets" at the end of this chapter.
- Not all websites can be run in the web page widget, which is actually a <iframe> element. Not all websites allow this. Some websites have an X-frame-options set to any of the following values:
  - **deny**: The website is not allowed to run in an <iframe>.
  - **sameorigin:** The website can only be run in an <iframe> when they both have the same origin (domain)
  - **allow-from <uri>:** The website is only allowed to be run in an <iframe> by a website that is run from a specific uri.

The web page that is shown in the widget can be opened in a new window, using the button

11 Help function

Via the main menu you can open the Help popup:
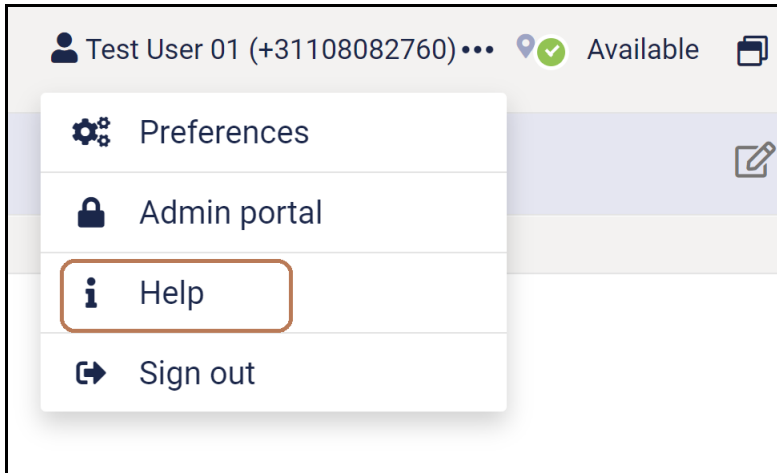
11.1 Attendant version

In the title of the Help popup, the current version of the Attendant is mentioned.
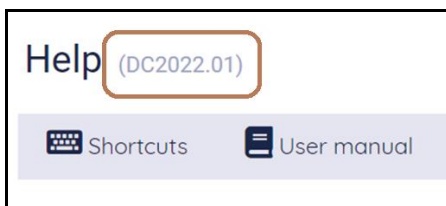
11.2 Keyboard shortcuts

The first tab page of the Help menu describes the keyboard shortcuts, as described in the chapter about Keyboard navigation.

11.3 User Manual

On tab page 'User Manual' of the Help menu you can download the user manual.
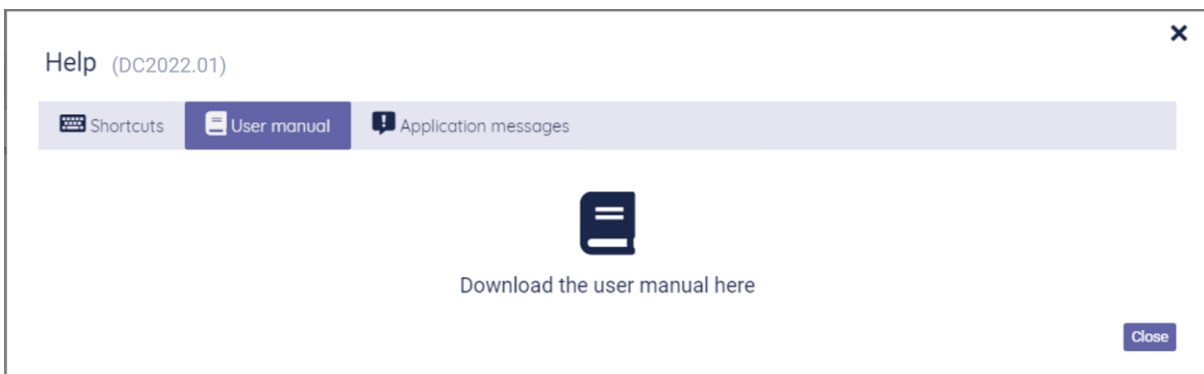
11.4 Application messages

On the tab 'Application messages' all toast messages are listed. The notifications can be copied with the 'Copy' button.

Help (DC2022.01)

| Shortcuts | Application messages | License |

02-06-2022 13:08:09 Copy successful	
02-06-2022 13:08:07 Copy successful	
02-06-2022 13:08:05 Copy successful	
02-06-2022 13:08:04 Copy successful	
01-06-2022 17:28:22 Email sent	
01-06-2022 17:24:37 Action could not be completed (probable cause: call is no longer available) (CEAJREUXMFLS0:00006817)	

11.5 License

On tab page 'License' you can view your license information.

Help (DC2022.01)

| Shortcuts | User manual | Application messages | What's new | License |

License	Attendant Console for Dialogue Cloud
Type	Subscription
Renewal date	13-03-2025(1021 Days)
For support, visit	https://anywhere365.io/support/

Close
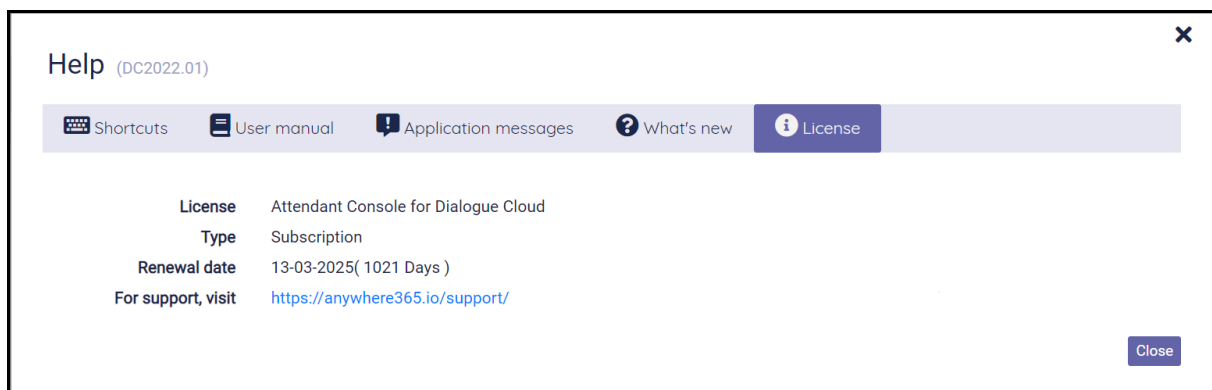
12 Sign out

When you open the main menu (1), there is a menu item to sign out (2). If you click this item, you will be logged out of the Attendant. You will not be asked for a confirmation.
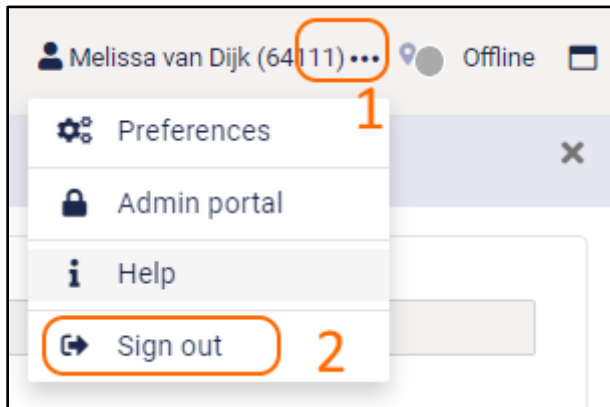
13 Global configuration

If you are permitted to edit the global configuration, you can go to the Admin Portal via the main menu:

In the Admin portal, you can enter some central configuration for the application. This configuration applies to all users of the Attendant. The following paragraphs describe the configuration, that can be made.
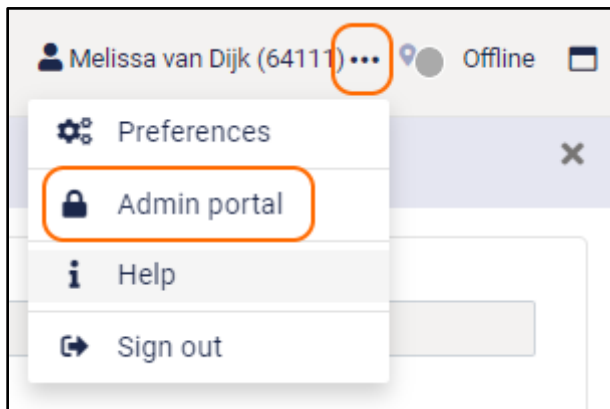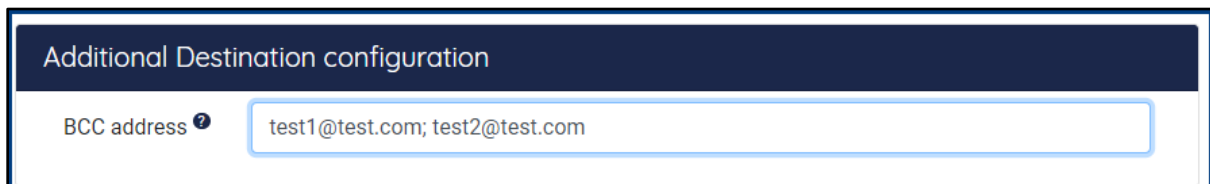
13.1 Mail

In the Attendant, the user can send a message to one of the contacts, for example to leave messages that there was a call for that contact. This functionality works with a default setting.

You can add 1 or more additional destinations to which the e-mail is being sent as a blind copy (Bcc). This can be done on the tab Mail of the Admin portal.

Add CC address on email settings

In addition to the existing blind copy (Bcc) feature in the email settings, users now have the capability to designate additional recipients for email copies directly through the Admin Portal's mail configuration. This enhancement allows for a more versatile distribution of correspondence.

Key Features:

Multiple Recipients: Users can specify one or more email addresses to receive a copy of the emails sent to contacts.

Easy Separation: Separate multiple email addresses using a semicolon (;) to ensure clear delineation of recipients.

Automatic Copying: Any email dispatched to a contact will concurrently be sent as a copy to the specified addresses in the Admin Portal's mail configurations.

You can customize the e-mail configuration to work with your SMTP server by configuring this in the Admin portal. This can also be done on the tab Mail.

13.1.1 SMTP Authentication

The following settings can be made:

- **Use custom SMTP server to send mails:** When this checkbox is checked, the configured settings will be used for sending mail.

- **SMTP server:** The name of the SMTP server that should send the mail.

- **Server port:** The port number of the SMTP server.

- **Default from address:** The email address that will be used for sending the emails, if the email address of the Attendant user has not been configured.

- **Authentication required:** If the SMTP server requires authentication, you can check this checkbox to enable the fields where you can enter the credentials.

- **SMTP:** When selected, the authentication type SMTP will be used for sending mail.

- **Username:** The username that will be used for sending mail via the configured SMTP server.

- **Password:** The password that will be used for sending mail via the configured SMTP server.

- **Send test mail to:** Enter a valid email address to verify the configuration.

You can test your settings by clicking on the button "Test" and save your changes using the button "Save".

After setting the custom SMTP, the users need to login into the Attendant again in order to see the new settings.

In case you also configured additional destination(s) these will also be used when sending e-mails using the custom SMTP settings.

13.1.2 Microsoft Office 365 Authentication

The following settings can be made:

- **Use custom SMTP server to send mails:** When this checkbox is checked, the configured settings will be used for sending mail.

- **SMTP server:** The name of the SMTP server that should send the mail.

- **Server port:** The port number of the SMTP server.

- **Default from address:** The email address that will be used for sending the emails, if the email address of the Attendant user has not been configured.

- **Authentication required:** If the Mail server requires authentication, you can check this checkbox to enable the fields where you can enter the credentials.

- **Microsoft Office 365:** When selected, the authentication type Microsoft Office 365 will be used for sending mail.

- **Client Id:** The client Id that will be used for sending mail via the configured Mail server.

- **Client Secret:** The client secret that will be used for sending mail via the configured Mail server.

- **Tenant Id:** The tenant Id that will be used for sending mail via the configured Mail server.

- **Send test mail to:** Enter a valid email address to verify the configuration.

You can test your settings by clicking on the button "Test" and save your changes using the button "Save".

After setting the custom Mail server, the users need to login into the Attendant again in order to see the new settings.

In case you also configured additional destination(s) these will also be used when sending e-mails using the custom Mail settings.
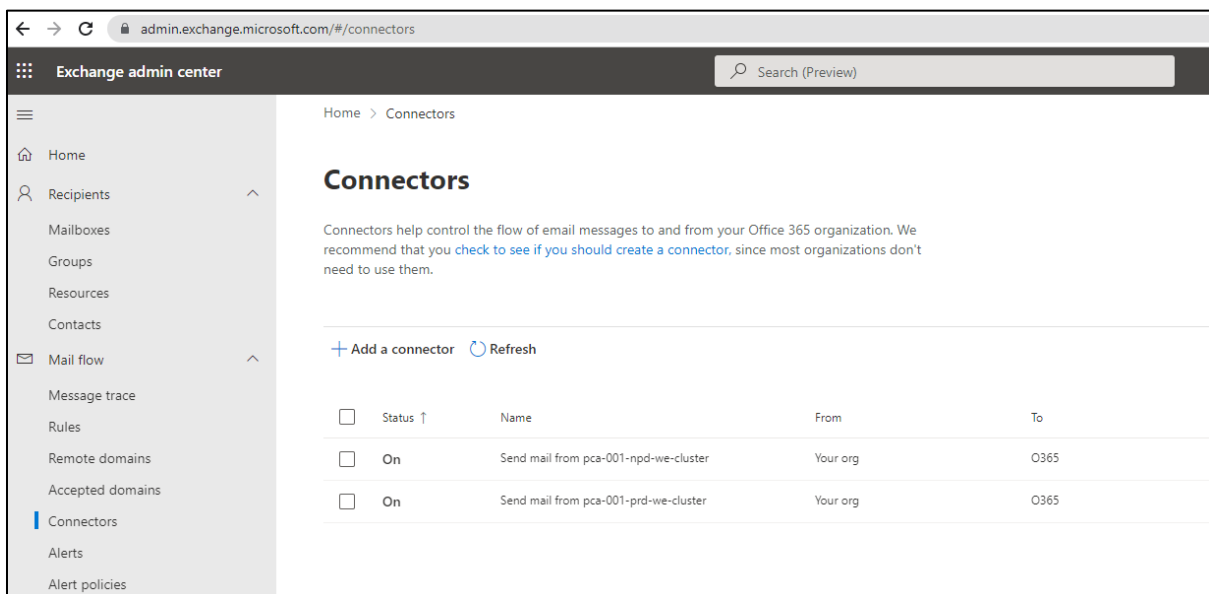
Important:

When using the Microsoft Office365 Authentication, following Permission are required for the related Enterprise application:

- Sign in and read user profile;
- Read all users' full profiles;
- Send mail as any user.

13.1.3 Without Authentication

To be able to send mail without authentication, it first needs to create a connector in the tenant you want to use.

Then set the settings in admin portal:

The following settings can be made:

- **Use custom SMTP server to send mails:** When this checkbox is checked, the configured settings will be used for sending mail.

- **SMTP server:** The name of the SMTP server that should send the mail, use the specific DNS for the tenant.

- **Server port:** The port number of the SMTP server.

- **Default from address:** The email address that will be used for sending the emails, if the email address of the Attendant user has not been configured.

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13.2 Connectors

13.2.1 Microsoft Dynamics CRM

On the tab page 'Connectors' you can give admin consent, so the users in your company can connect to the Microsoft Dynamics CRM from the Attendant.

Admin consent can be given as follows:
You can fill in your Azure Id. This Azure account should have administrator rights.

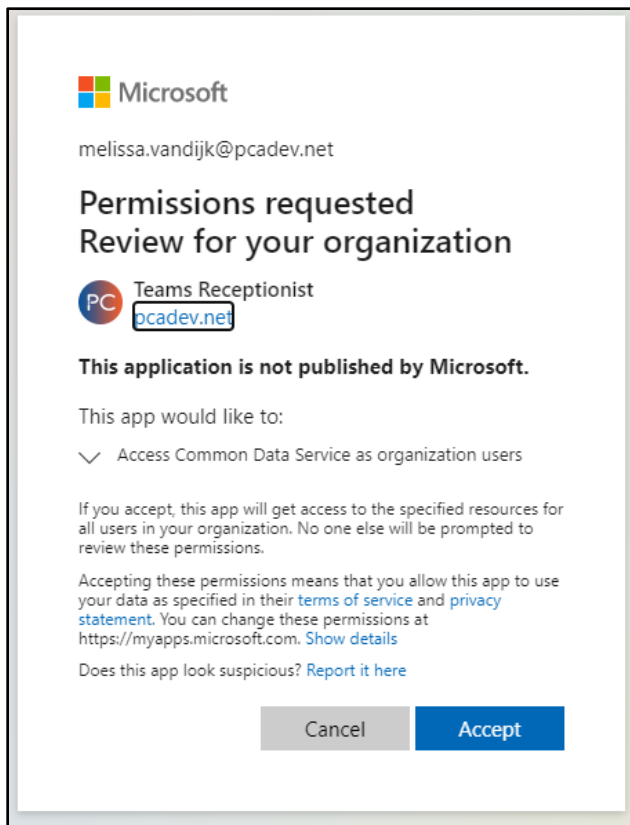When you click on button "Give consent", you will be redirected to a page where you can give consent. It might be that you first have to sign in or select with which account you want to give consent. The page where you are redirected looks like this:

After you click on button "Accept" you will be redirected back to the Admin Portal. If all went well, you will see a green confirmation that the consent was given successfully.
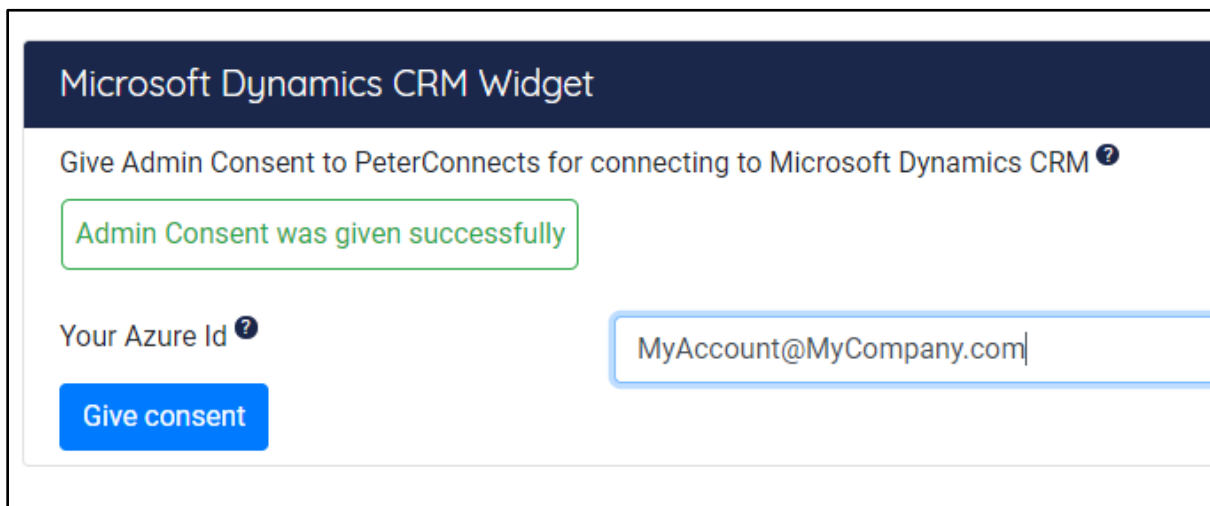
If something went wrong, you will see a red error message with a description what went wrong.

13.2.2 ACS connection string

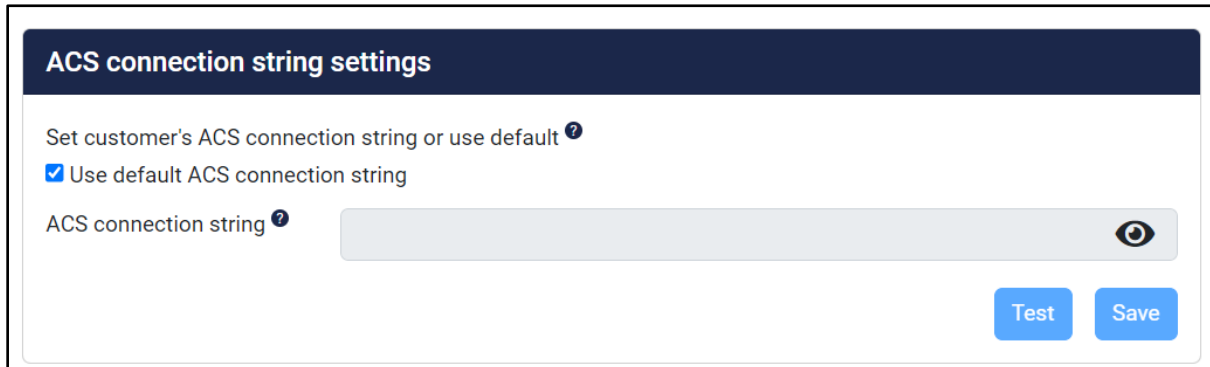On the tab page 'Connectors' you can configure the ACS connection string.

The first the step before using ACS is to grant consent to the Attendant Console application.
Consent to Attendant Console permissions

Second, a connection string needs to be set in the Admin portal. This connection string needs to be created in Azure according the instructions by Microsoft, see: Create and manage resources in Azure Communication Services

Note: a connection string starts with `endpoint=`, then contains a URL followed by a semicolon and an access key.
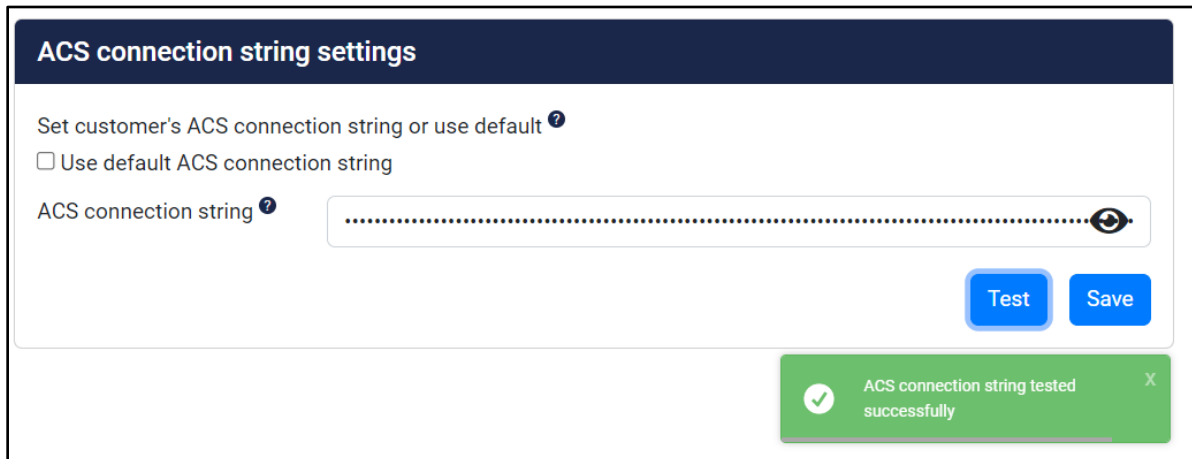
To set the connection string, first deselect the "Use default ACS connection string" and then copy the created connection string from Azure into the ACS connection string input field.

Before saving, the settings can be tested by pressing the Test-button. A green popup will be shown if the test succeeds.
Press the Save-button to store the new settings.

13.3 Specific configuration in tenant

To be able to do calling actions and use queues in the receptionist, consent must be given for the calling application and queue endpoints must be created in the tenant. For a guide on how to do this, a separate walkthrough is available at https://product.attendant.anywhere365.io/configuration-attendant-console

13.4 User privileges via Admin portal

On tab page 'User Privileges' you can configure for all users the access to

- Admin Portal
- Add/edit/delete Personal contacts
- Add/edit/delete Shared contacts.
- Manage the Preferences
- Add/edit/remove Widgets

You can also configure the default settings for new users.

13.4.1 Setting user privileges for default user

With the '(Default for new users)', it is possible set the default for new users. For example: When the 'Enable Admin Portal access' and Enable manage widgets is unchecked, all new users do not get Admin Portal and manage widget access, they only get manage preferences, manage personal contacts and manage shared contacts.

13.4.2 Setting user privileges for specific users
On tab page 'User Privileges' you can also configure the privileges for individual users.

When searching for a specific user, the privileges for this individual user can be set specifically for this user.

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Remark: A user cannot remove the Admin Portal access for his/her own account. This is shown with a greyed-out checkbox.

Remark: When manage Personal and/or Shared contacts is disabled for a user, the selected user cannot manage (create, edit or delete) Personal and/or Shared contacts. The user can, however, still view Personal and/or Shared contacts and use them as a filter.
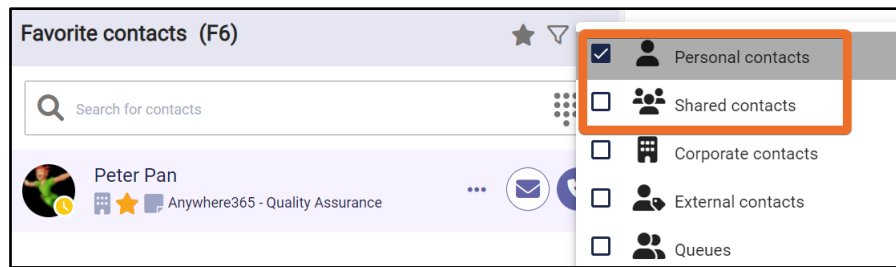
13.5 Maintain callback mail template

On tab page 'Mail Templates' you can configure mail templates used for call back e-mails. On the top half of the page, you see a list of mail templates. On the bottom half, you see the text to select a mail template or to create a new one.
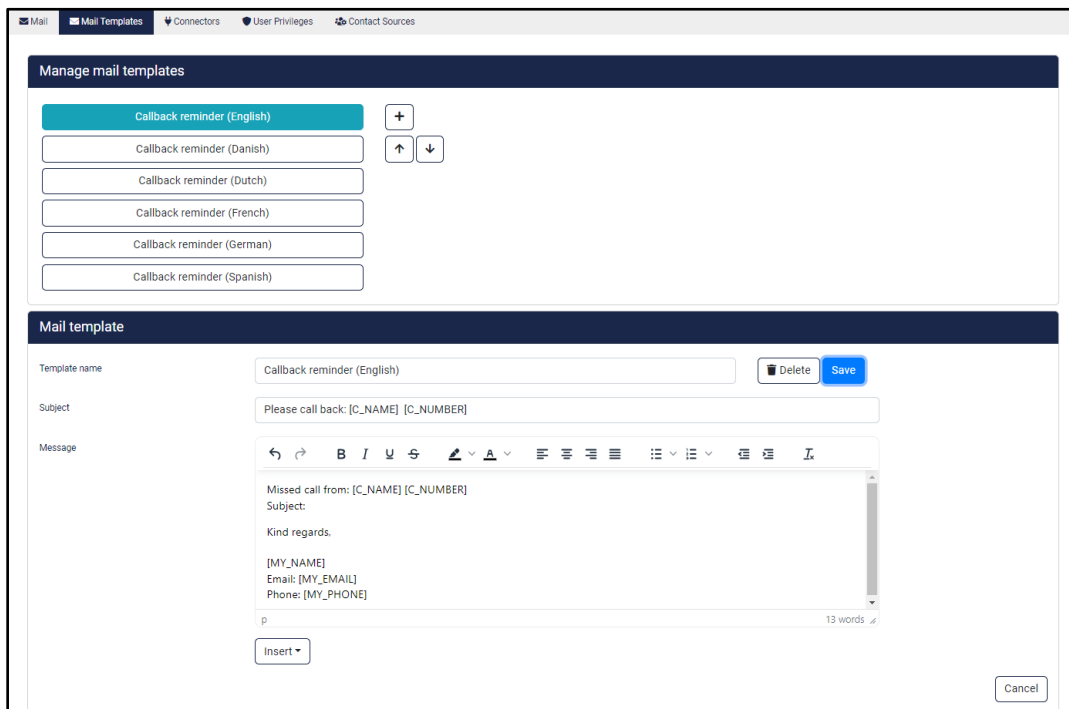
13.5.1 Adding a new mail template

In the top half of the page click on the [+] sign to open the bottom part for entering a new mail template.

A mail template requires:

1. Template name, name of the template as it is shown to the user;
2. Subject, this line becomes the subject of the e-mail that is being sent;
3. Message: this contains the actual e-mail content. By using the insert drop down at the bottom the following fields can be inserted:
   - Name of caller;
   - Phone number of caller;
   - Date;
   - My mail address (e-mail address of the logged in user);
   - My name (name of logged in user);
   - My phonenumber.

De message can be styled using the buttons on top of the Message box, you can use Bold, Italic, Underlined as well as some other options to style the text.
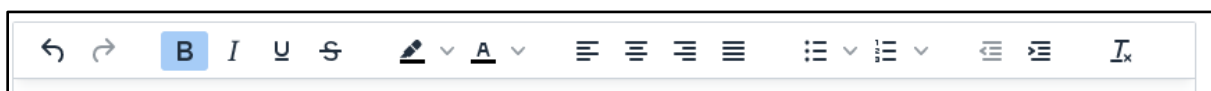
Once the mail template is finished it can be stored by clicking the 'Save' button.

In case the mail template can be discarded, this can be done by clicking the 'Cancel' button.

13.5.2 Arranging the order of mail templates

By selecting a mail template and clicking on the arrow up or arrow down button you can arrange the order of the mail templates. The mail templates are shown in this order when the user selects a mail template for sending a callback reminder e-mail.

13.5.3 Changing or deleting a mail template or creating a new one

By selecting a mail template, the content of that mail template is shown in the bottom half of the screen. The user can change the content like with creating a new mail template and then press the 'Save' button.

By clicking the 'Delete' button a mail template that is obsolete can be deleted. The delete action has to be confirmed.

13.6 Contact sources

In the Admin Portal, under the tab 'Contact Sources' additional contact sources can be managed. Contacts from these sources will become part of the contact list (F6).
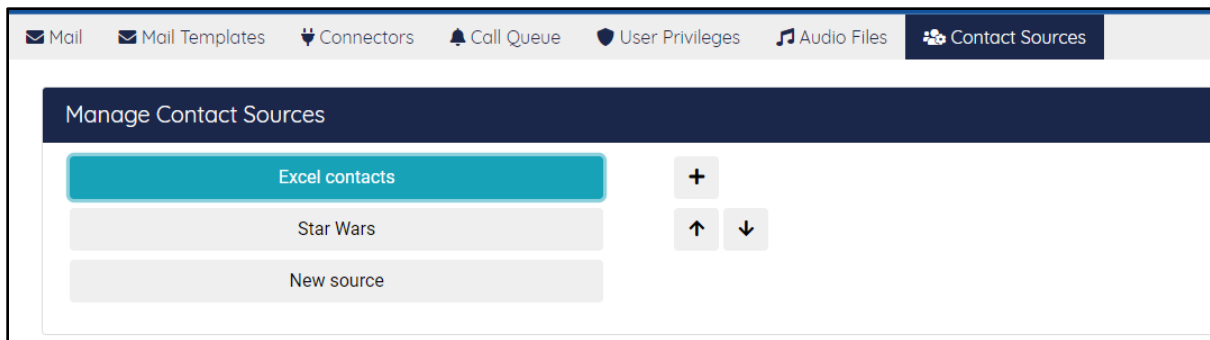
A new contact source can be added via a link to the source document, this can be Excel or CSV source documents.

Each contact source appears in the filter menu and can be toggled on/off just like other contact types.

After adding a contact source, an application refresh is necessary to make the contact source show up in the filter menu. The contact list (F6) will automatically be updated when the contacts in the source document are changed, however it might take some time for the new changes to end up there.
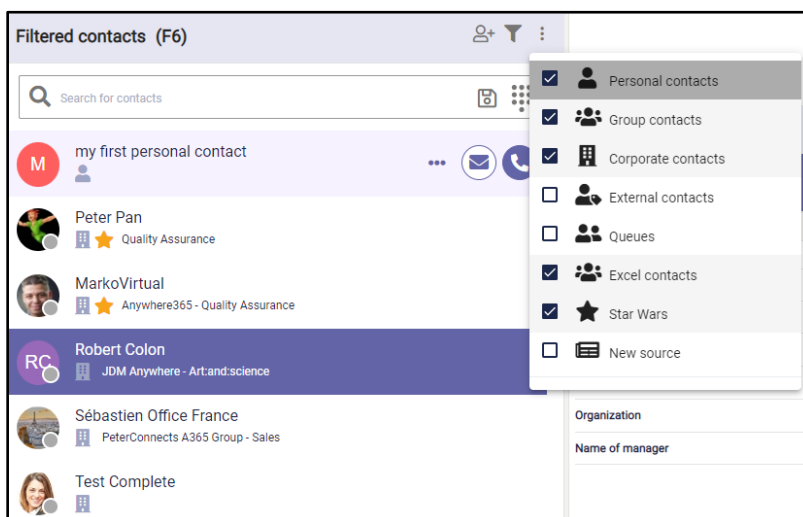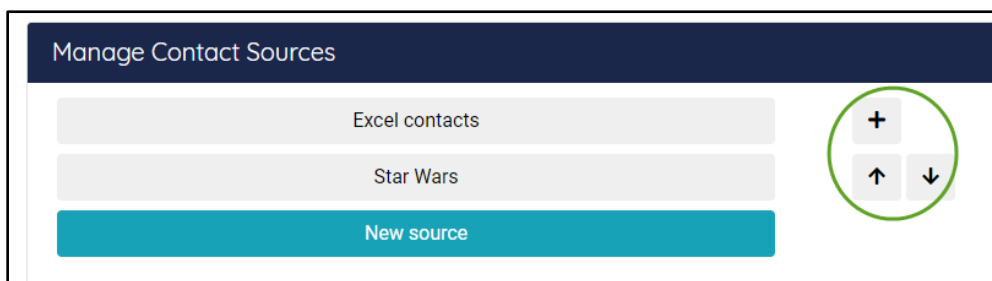

The order in which the contact sources are presented in the filter menu can be changed by clicking on an item in the list in the Admin Portal and using the arrow up and down buttons to the right to move it up or down the list, respectively.

13.6.1 Managing access

In order to work with contact sources, we need to set up a way for the attendant console to be able to read files from Sharepoint. At the top, there is a panel to manage access.

There are 3 possible ways to set up access:

1. Use the Anywhere365 enterprise application. For this, you only need to specify your own Azure tenant ID, save it and give consent. The Anywhere365 then has access to read the files your tenant's Sharepoint.

Manage Access ⌃

To use the Contact Source feature, please set up access to shared files on Sharepoint.

◉ Read files with Anywhere365 enterprise application ❓
○ Read files with own application registration ❓
○ Read files with user access ❓

Directory (tenant) ID ❓   8939ca96-dcdc-4651-b5e0-71d6162eb5d0

How to find your Tenant ID?

Required API Permission   Microsoft Graph/Files.Read.All

[Save]   [Give consent]

2. Create an application registration in your own tenant and configure the access to it here. You will need to set up the permissions yourself. The Client Secret is stored securely and after saving will not be shown in the admin portal. The links below each setting will help gather the required information and to set up the application in Azure.

Manage Access ⌃

To use the Contact Source feature, please set up access to shared files on Sharepoint.

○ Read files with Anywhere365 enterprise application ❓
◉ Read files with own application registration ❓
○ Read files with user access ❓

Directory (tenant) ID ❓   8939ca96-dcdc-4651-b5e0-71d6162eb5d0

How to find your Tenant ID?

Application (client) ID ❓   6e63a1ef-38df-4491-988b-983604766c94

Create application registration to access shared contact files on Sharepoint

Client Secret ❓

Create secret for application registration

Required API Permission   Microsoft Graph/Files.Read.All
Assign API Permissions

[Save]

3. Use delegated access from your user. This option is only available if you are logged in with an Azure User in the Attendant Console. This also requires admin consent.
Since different users can be used to access the files, extra caution must be taken when setting up the access to the files in Sharepoint. If some users do not have access to the file, it might lead into issues when loading the contacts.

The Manage Access panel will be collapsed when there are contact sources configured, but the settings can always be revisited by clicking on the header.

13.6.1.1   Admin consent

As said before, the application requires admin consent for reading files users have access to. If this consent is not given, a message will pop up including a button to give consent. If no admin consent has been given, validating a contact source will result in a permission denied error.

Clicking on the 'Give consent' button will redirect you to a Microsoft page where you can accept the permissions requested:

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After giving consent, it might take a few minutes before it has been processed. Please refresh the page until the message disappears. Once the consent message is no longer presented, the contact sources are available to be configured.
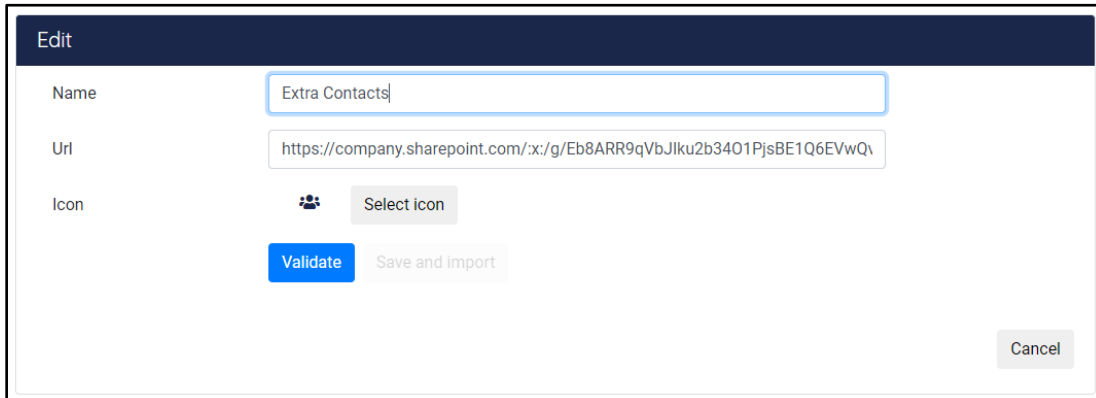
13.6.2 Adding or changing a contact source

By clicking the plus icon [+] next to the list of current contact sources you can add a new contact source. After clicking the button, a new section opens below the list of contact sources. You can also select one of the contact sources in the list to edit.

In the form you can give the source a name and icon which is displayed to the users in the contact list filter menu. You can also paste the URL of the file here.
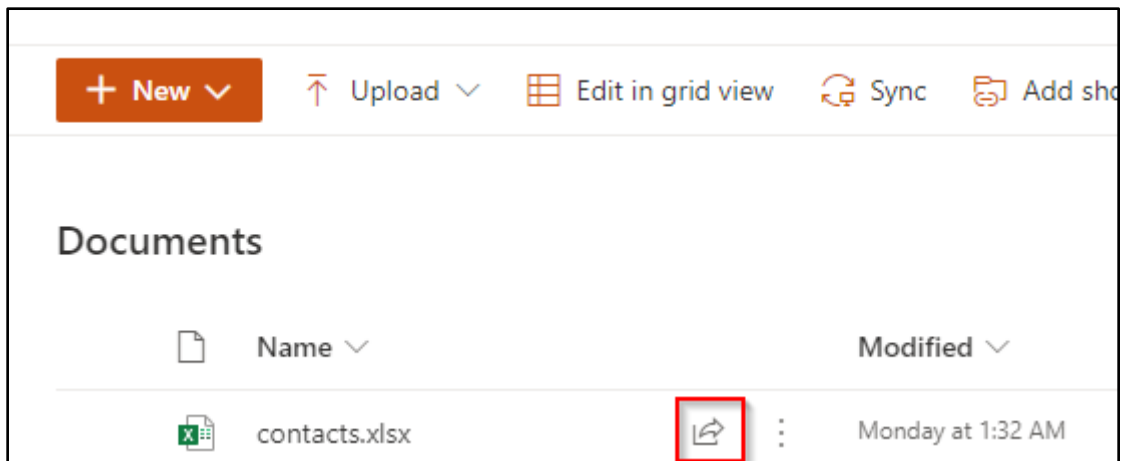Files can be either Excel files or Csv files stored on the organizations SharePoint or OneDrive.
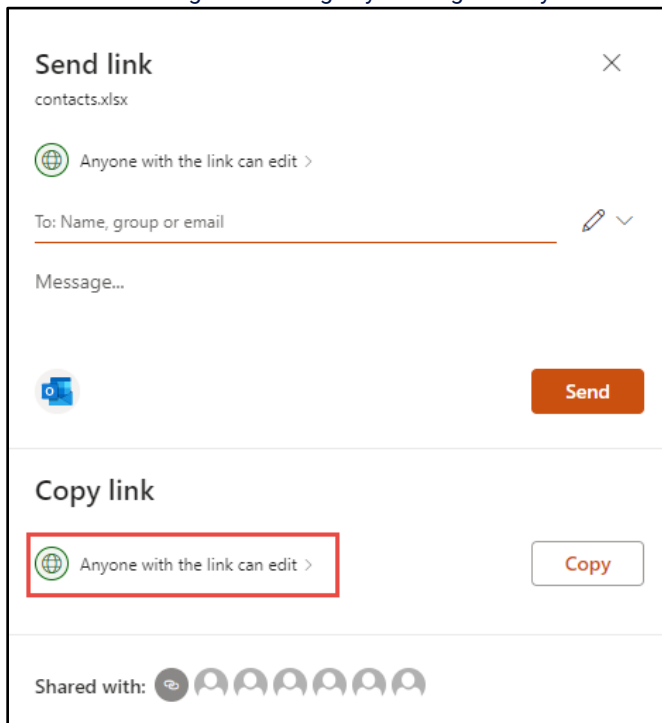

To create a URL which can be pasted in this form, go to your organization's SharePoint or OneDrive in your browser and locate the file. Then click on the Share Link button:

There you can copy the link and change access. By default, the Edit rights seem to be granted for everyone who has the link.

You have to change the settings by clicking on "Anyone with the link can edit".

Only view access is required for the contact source functionality: uncheck the 'Allow editing' checkbox to make it read-only.

Additionally, make sure to make the link only works for people in the same organization. The option "Anyone with the link" is unsecure, while "People with existing access" or "Specific people" might not allow the system to read the contacts when the document has been changed.

A pop up is presented with a 'Copy' button to copy the URL to the contact source to the clip board. Please verify that it indeed indicates that only people from your tenant with the link can view the document.

With the URL on your clipboard, please return to the admin portal. After filling in both the Name and the URL and optionally selecting a different icon, you have to validate the contact source by clicking the 'Validate' button.
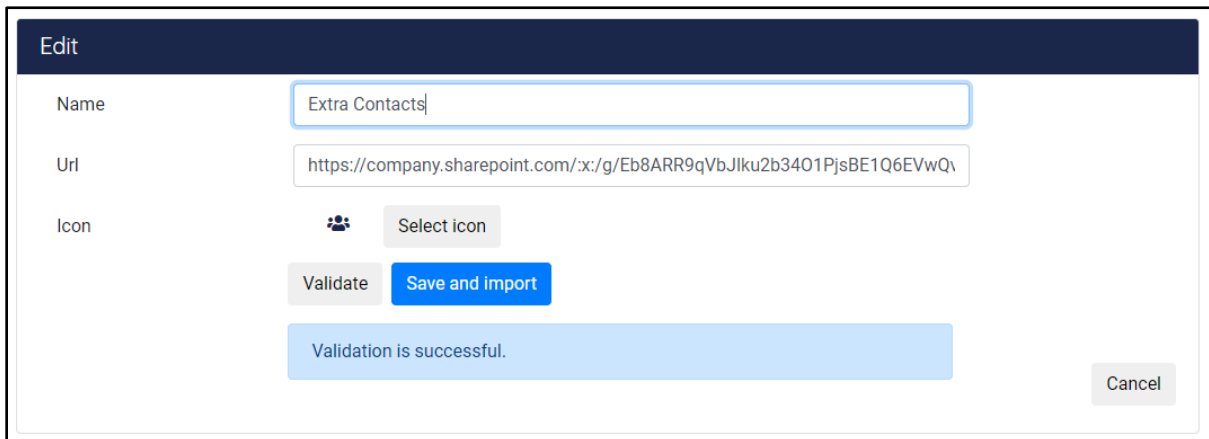
This will validate and test access to the contact source. After validation a message will appear to show the user whether the file is correct or not. In case the file is not valid a detailed message is shown, in case the file is valid it shows 'Validation is successful'.

After a successful validation, the 'Save and import' button will be enabled. Click it to actually import and save the new contact source in the contact list (F6).

A progress message will appear showing the status of the import.
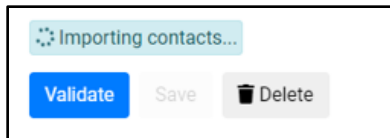
Once ready it shows a green 'Ready'.

The contacts in the new contact source will only show up in contact list search results when all contacts have been imported and actually saved (available in the cache). After login the Attendant will see the new contact source in the contact list filter menu.
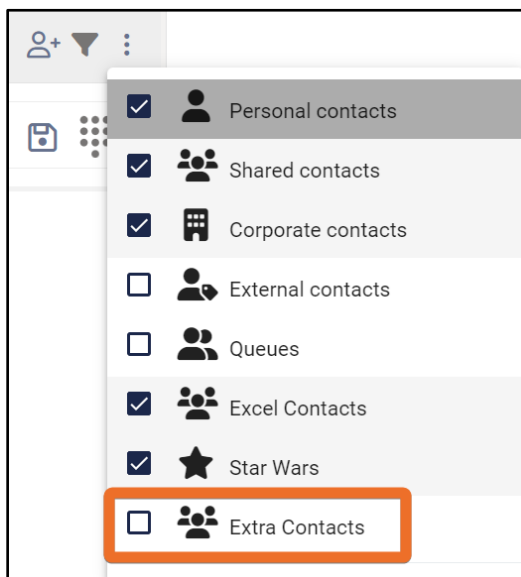
Changes to the underlying contact source files will automatically be picked up when a search is being performed and the file has been found to be modified. Important to know is: it might take some time before the changes are synchronized into the contact list, especially with large contact source files (it triggers a cache rebuild).

When the cache is ready, a 'Refresh cache' button appears. This button will force a complete refresh of the contacts in the source file.
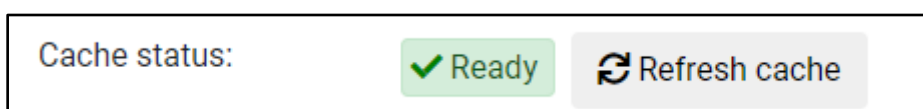
Note: after changing a document in Sharepoint or OneDrive, it may take a couple of minutes before the changes are picked up by the Admin Portal.

In case you do not want to create the contact source after all, you can click 'Cancel' and the bottom part is closed and nothing is saved.
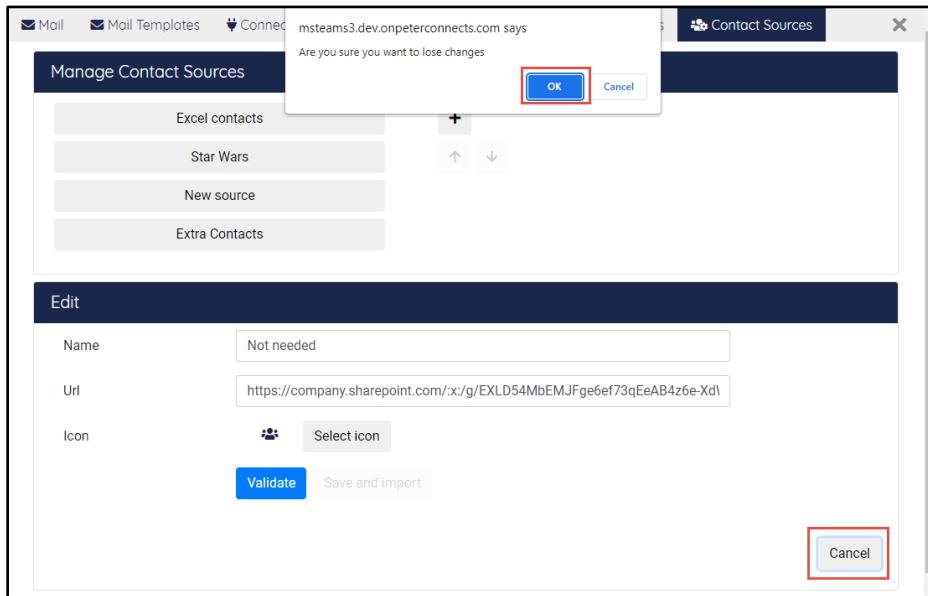
13.6.3 Deleting a contact source

To delete a contact source, click on it in the list of contact sources. The form with the details will appear. Click the 'Delete' button confirm that you are sure you want to delete this contact source.
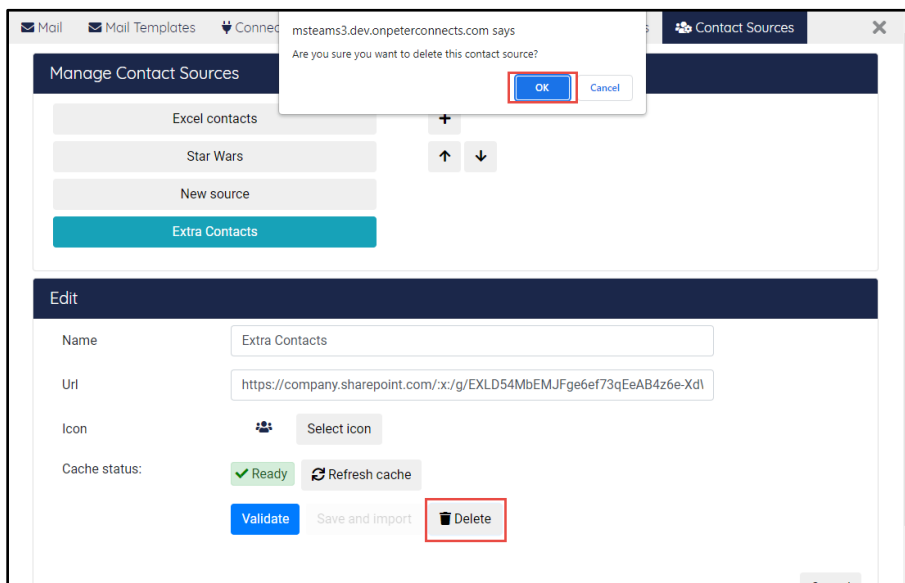
In the background, the contacts will be removed. The contact source will also disappear from the filter menu in the contact list (F6).

13.6.4 Supported file formats and columns

Currently the following files are supported: Excel files (.xlsx, .xls), comma or semicolon separated files (.csv) and tab separated files (.tsv).

For Excel files the first sheet must contain the data, all other sheets are ignored.

On the first row the column names are specified. Every column corresponds to a property of a contact. See below for a list of all properties supported. Required properties are the LastName and Id.

The next rows should contain the information of the contacts.

For template and example files, please see the following zip file:
https://delivery.anywhere365.io/deployment/Attendant-Attendant-Contact-Sources.zip

Below is a list of supported columns:

Column	Description
Id	(Required) A unique ID for this contact in this file.
FirstName	
MiddleName	
LastName	(Required)
CompleteName	
DisplayName	
Sexe	
Initials	
CompPrimaryPhone	Primary phone number
CompAltPhone	Alternative phone number
MobilePhone	
PrivatePhone	
Extension	
Pager	
Titles	
Function	
CompanyEmail	
PrivateEmail	
CompFax	
SipAddress	
BuildingAddress	
BuildingStreet	
BuildingHouseNumber	
BuildingPostalCode	
BuildingCity	
BuildingCountry	
BuildingState	
BuildingPoBox	
BuildingPoBoxZip	
BuildingPoBoxCity	
ManagerName	
Room	
Location	
Organization	
Department	
Building	
ExtraCol1	

ExtraCol2	
ExtraCol3	
ExtraCol4	
ExtraCol5	

13.7 Number normalization rules

In the Admin Portal, under the tab 'Number Normalization' rules can be configured that apply to all phone numbers in the Attendant while dialing out. This is necessary for example when local numbers need to be mapped to the E164 standard.
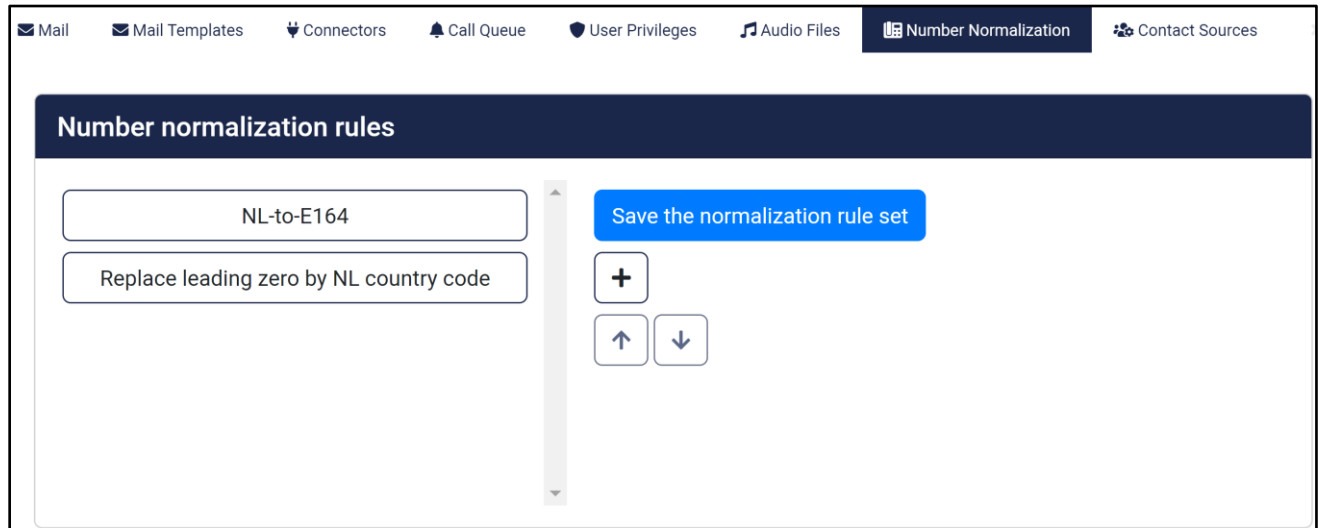
A list of number normalization rules is presented. You can change the order in which they appear by selecting one and clicking the arrow buttons on the right. The order is important, because it will try to match the patterns of the rules from top to bottom. Only the first matched rule will be applied. There is a separate button you need to press to save the complete rule set to the server. That way changes are not effective while you're still in the middle of configurating it all.

13.7.1 Adding/editing a rule

After clicking the 'Add' button [+] or selecting an existing entry, a new section opens below where you can enter a name, description, pattern and translation. The pattern field can take a regular expression and translation field takes the replace value. Some examples:

Replacing a leading zero by a different prefix:

View/edit normalization rule

Name	Replace leading zero by NL country code
Description	
Pattern	^0
Translation	+31

Confirm   Delete   Cancel

Replacing the leading zero by a different prefix of a 10-digit phone number:

View/edit normalization rule

Name	NL-to-E164
Description	
Pattern	^0(\d{9})$
Translation	+31$1

Confirm   Delete   Cancel

This will replace a matched phone number starting with 0 followed by 9 other digits, by +31 followed by the part of the matched phone number that was between brackets, so in this case those 9 digits. You can use the $1 (, $2 …) placeholder in the translation field to do this.

13.7.2 Testing the rule set

The test tab applies to the set of number normalization rules. Enter a phone number to be tested, and just like in the Attendant, it will be stripped from spaces, dashes and brackets first and then the configured normalization rules. The rule set can be tested before saving it to the server.

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Test the normalization rule set

Input	0151234567
Output	+31151234567

Test

14 Change history

1.6	• Note added to 6.3 about the spinning hourglass • Added 7.3 Reason codes • Added note to 8.1 about the support of Desktop Integrator and updated information about ACS integration • Added 8.2.2 2nd ringer device • Added 8.2.4 Wrap-up time • Removed 10.4.6 Twitter widget which no longer works • Added note about unjoining UCC's to Queue Management
1.5	• Added section §13.2.2 about configuring ACS connection settings
1.4	• Update section §5.9 with option to add/edit/remove contacts in F6
1.2 / 1.3	• Renamed 5.4, 5.10, 5.11, 13.4, 13.6 contact types Group to Shared • Updated 6.12 with the rich text editor functionality • In 7.3 Added possibility to dial a Teams queue • Added 7.4 description of call recording • Added in 9.1 use of Desktop Integrator • Added 13.1.3 Mail without authentication • Updated 14.5 with the rich text editor functionality for mail templates
1.1	• Added info about required permissions for mail configuration via Office365 authentication in $13.1 • Add $5.8.1.3 Searching contact notes • Add Danish in $9.4 • Add $12.4.3 Managing user privileges extended • Add $13.6 contact sources
1.0	• Initial version

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