



# Community Everywhere™ The Mobile App

Webinar handout  
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phone 877-668-6870  
web CommunityWFM.com

3400 Waterview Parkway, Suite 325  
Richardson, Texas 75080



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## About this document

This document accompanies the CommunityWFM College webinar *Community Everywhere™ – The Mobile App*. It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar. Screen shots are from an iOS device, but the app is also available for Android.

## Setting up the App

### In the web application

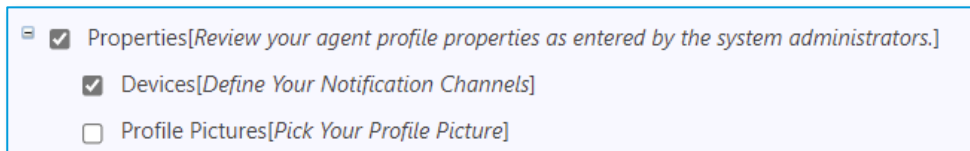
#### Add *Devices* menu item

To set up the app, agents and supervisors will need access to the QR code on the Properties > Devices menu page. The QR code contains the application information. Typically, the page is already available to agents, but may need to be added for supervisors. Alternatively, they can type in the URL and port number when logging into the app.

To make changes to the web application menu structure navigate to Settings > Application settings > Administrative settings > Application menus.

In the drop-down menu in the upper right select the role (supervisor, scheduler, administrator) then click *Refresh*.

On the left, scroll down to Properties and check the box. Uncheck the box for Profile Pictures.



Scroll to the bottom and click *Save Menu Structure*.

If you need assistance with editing the application menus, contact your support team.



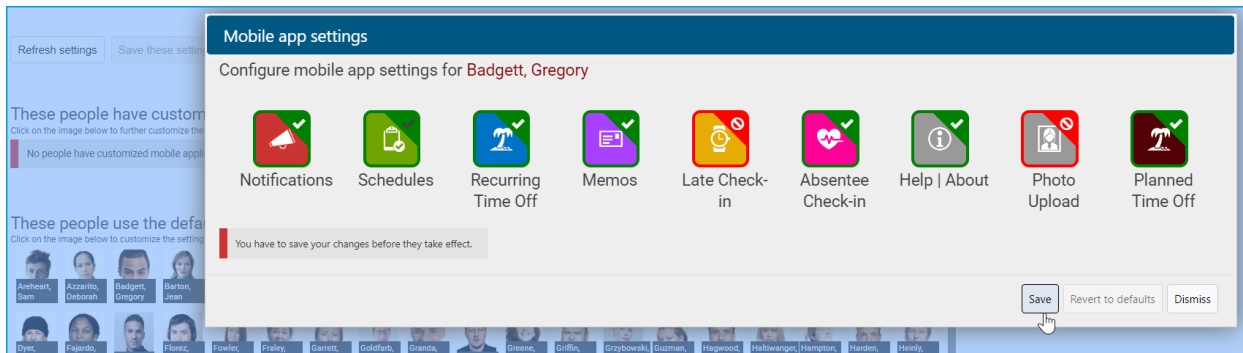
## Configure Community Everywhere

Settings > Application settings > Administrative settings > Mobile application setup

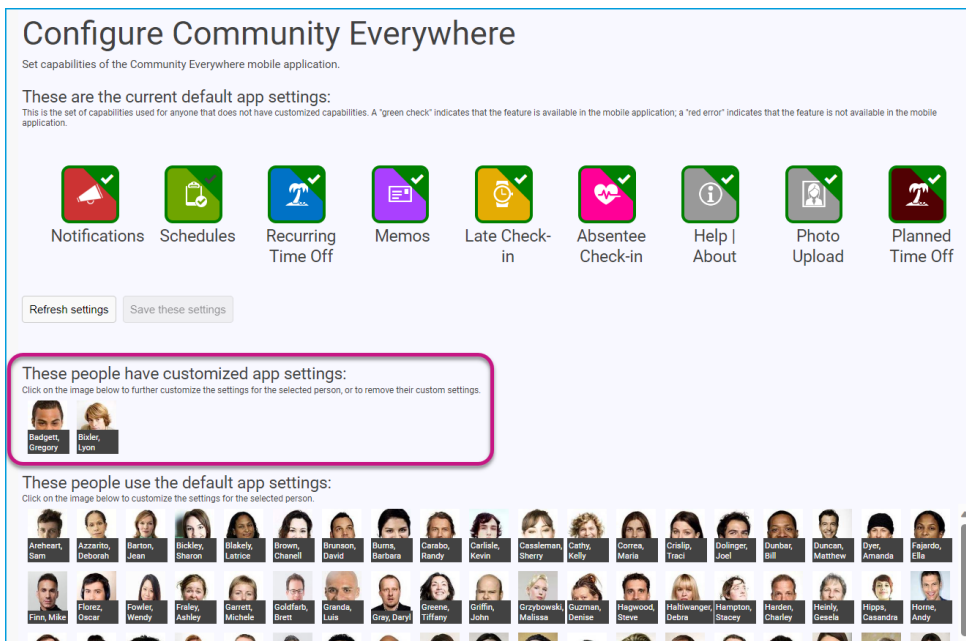
This section determines what people are allowed to do in the app. The default settings allow all options for all people.

To customize the settings (e.g., if there is an agent who has abused the photo upload or late check-in):

1. Click on an agent's picture to open the app settings options.
2. Click each icon you wish to remove from the mobile app options.



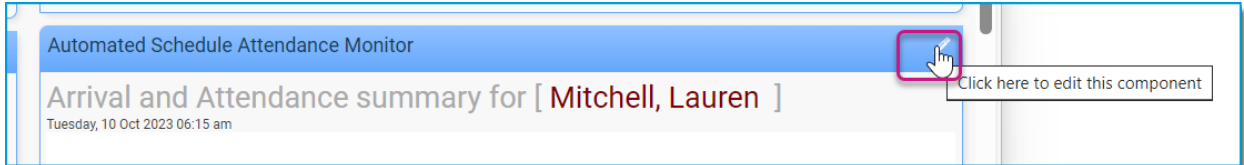
3. Click *Save*.
4. View people who have custom settings.



## Supervisor set-up—In the web application

### Configure Automated Schedule Attendance Monitor (ASAM)

Add the ASAM to the home page (hover over picture > Personalize > Choose your content tab > wide column > select *Automated Schedule Attendance Monitor*) then click the edit (pencil) icon to configure the ASAM.



Select a participant list of *Supervisor* from the organizational tree then select the Supervisor name. Recommended settings include looking ahead and back by two hours with 15-minute intervals.

Save your settings.

### Configure automated schedule attendance monitor

Configure your individual preferences for the automated schedule attendance monitor.

<p>Participant list type</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Select a supervisor from the organizational tree ▾</div>	<p>Selected supervisor</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Mitchell, Lauren ▾</div>
<p>Number of hours to look behind from current time</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">2 ▾</div> <p style="font-size: x-small; color: #808080;">Current default value of 2 hours.</p>	
<p>Number of hours to look ahead from current time</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">2 ▾</div> <p style="font-size: x-small; color: #808080;">Current default value of 2 hours.</p>	
<p>Summary interval size for arrival counts</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">15 ▾</div> <p style="font-size: x-small; color: #808080;">Current default value of 60 minutes.</p>	
<p>Require hard checkin?</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Default ▾</div>	
<p>Auto refresh setting</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Default ▾</div> <p style="font-size: x-small; color: #808080;">Current default value of 30 seconds.</p>	
<p>Display attendance summaries only?</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Default ▾</div>	
<div style="border: 1px solid #ccc; padding: 5px 10px; margin-top: 10px; display: inline-block;">Save settings</div>	



## Configure Schedule Adherence Monitor (SAM)

Add the SAM to the home page (hover over picture > Personalize > Choose your content tab > wide column > select Schedule Adherence Monitor). On the Today page click the edit (pencil) icon to configure the SAM.



## Downloading the App

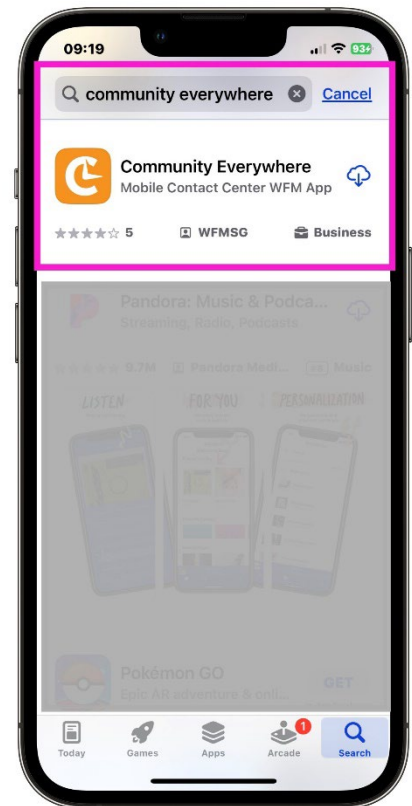


The mobile app is an add-on service available to users of Enterprise and Essentials versions of CommunityWFM.

If there is no license, you may be able to download the app but will not be able to use it. Contact your account representative to discuss obtaining a license.

If licensed for use, agents and supervisors can download the app to their Apple or Android device from the Apple App Store or Google Play by searching for "Community Everywhere."

**Note:** Older versions of the app may not support all features.

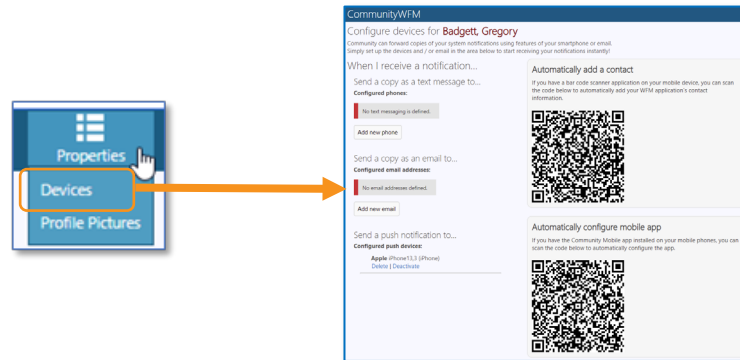




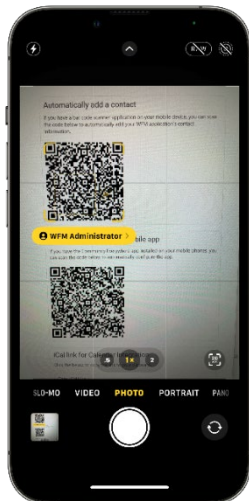
## In the mobile application

### Scan the QR codes

Log into the desktop version and go to Properties > Devices. This page has QR codes that will make it easy to set up the app.



### Automatically Add a Contact



Scan the top QR code with your camera or a QR code scanner to add the WFM Administrator to your phone contacts. This will ensure you receive notifications, especially if you block unknown contacts.



### Automatically Configure the Mobile App

1. In the desktop application, open the Devices page (Properties > Devices).
2. Open the app on your device and go to **Settings**.



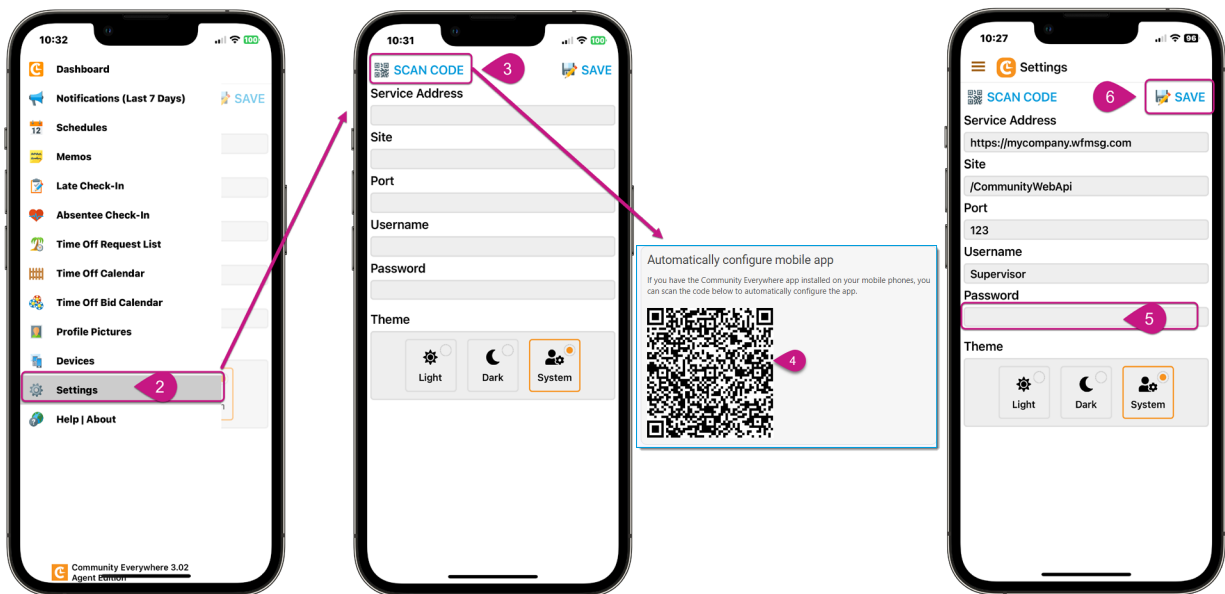
3. Tap **Scan Code** at the top of the screen.
4. Scan the **bottom** QR code on the Devices page. This will add the business information and username to the login page.

**Note:** you must use the in-app QR code scanner (*Scan Code* button) for this step.

5. Type your CommunityWFM password.

**Note:** If your company uses single sign-on (SSO), you will need to have a separate and unique password for the mobile app.

6. Tap  **Save**.



## Using the App

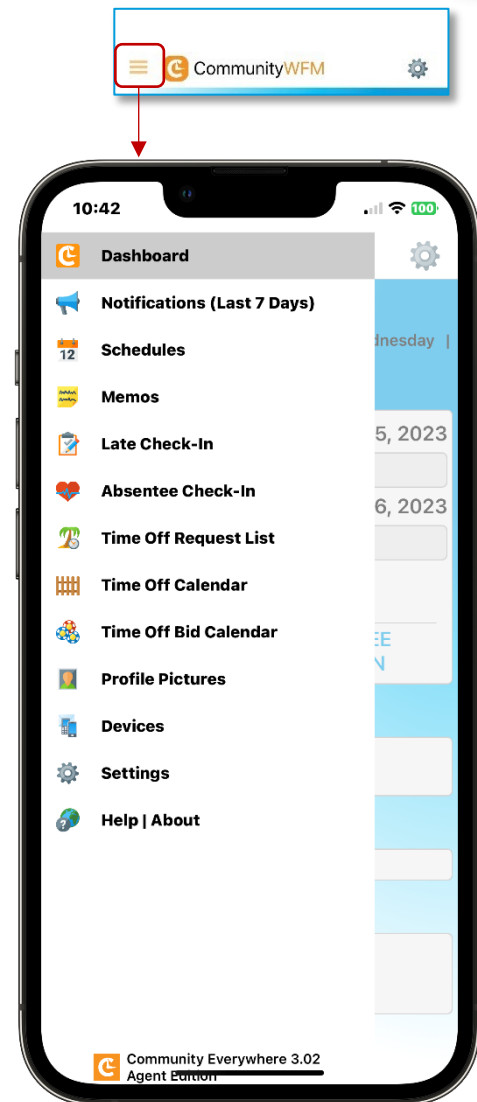
Many of the modules from the desktop view are available in the mobile app on a phone or tablet. Access and options depend on role permissions.

Click on the hamburger menu icon (☰) in the upper left to view the options.



## Menu options—Agent

- Dashboard
  - Upcoming schedule
  - Agent adherence summary
  - Time off
  - ASAP
- Notifications (Last 7 Days)
- Schedules
- Memos
- Late Check-In
- Absentee Check-In
- Time Off Request List
- Time Off Calendar
- Time Off Bid Calendar
- Profile Pictures
- Devices (add or remove devices for notifications)
- Settings
- Help | About (add/change profile picture)



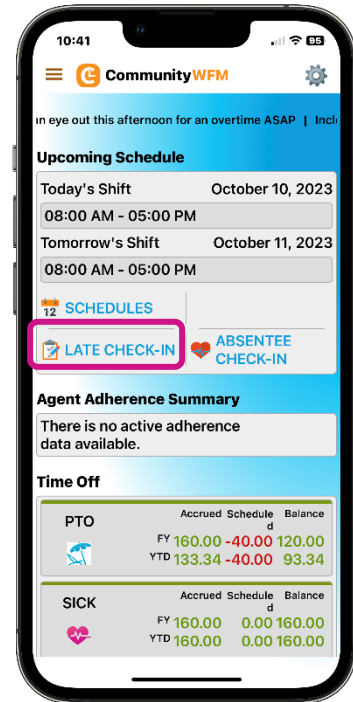


## Agent options

### Agent Dashboard

At a glance, agents can view their upcoming schedule, check in as late or absent, view their adherence summary, time off accruals, upcoming time off, and view available ASAPs.

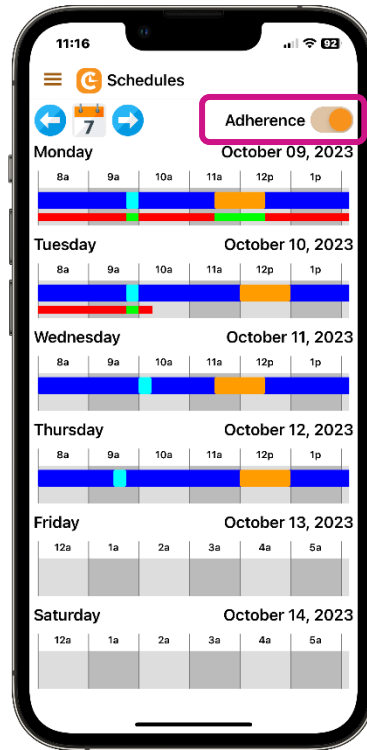
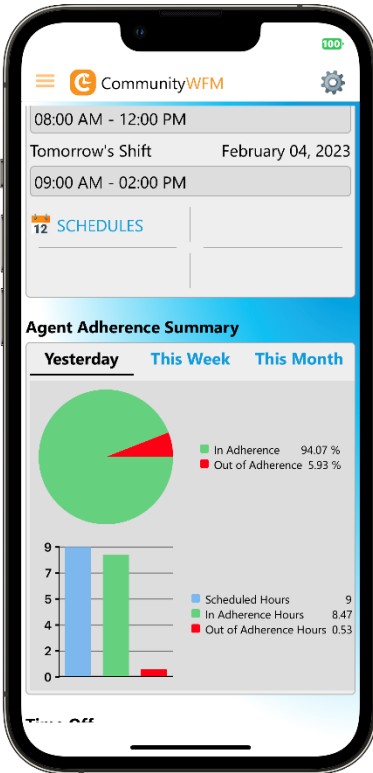
While today and tomorrow's shift show on the dashboard, tapping *Schedules* will display the schedule for the week.





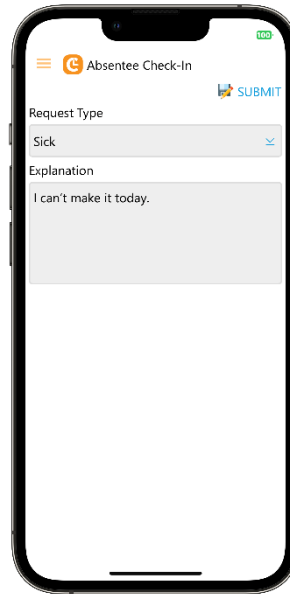
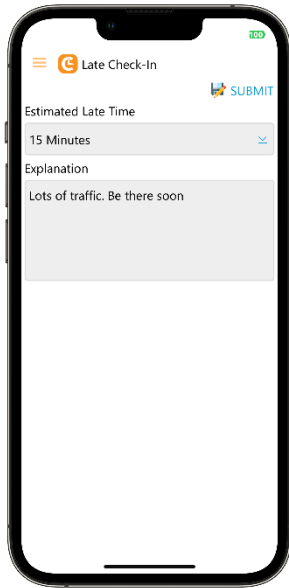
## Adherence

The dashboard includes an adherence summary, or on the Schedules page, toggle the adherence button to view adherence.



## Notify supervisor of late arrival or absence

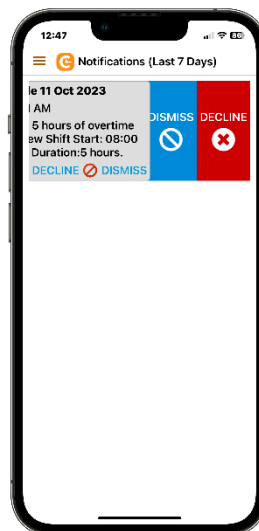
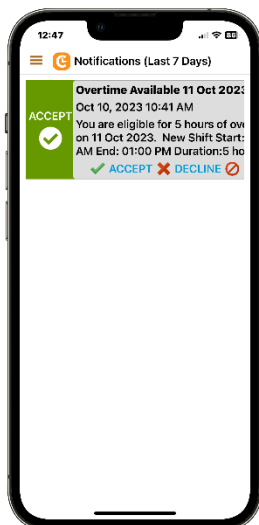
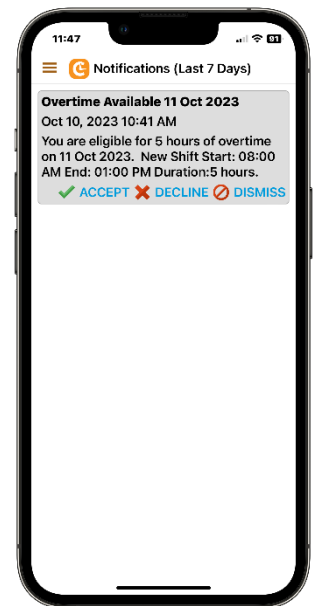
If running late, agents can send a message including an estimated time of arrival.  
 If absent for the shift, agents can select from available event types to apply.



## Accept or decline ASAPs

The dashboard includes a list of available ASAPs, but to accept or decline an offer, agents must visit the *Notifications* page.

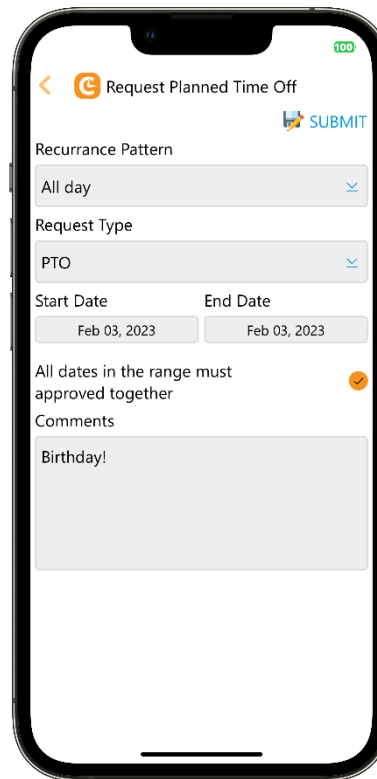
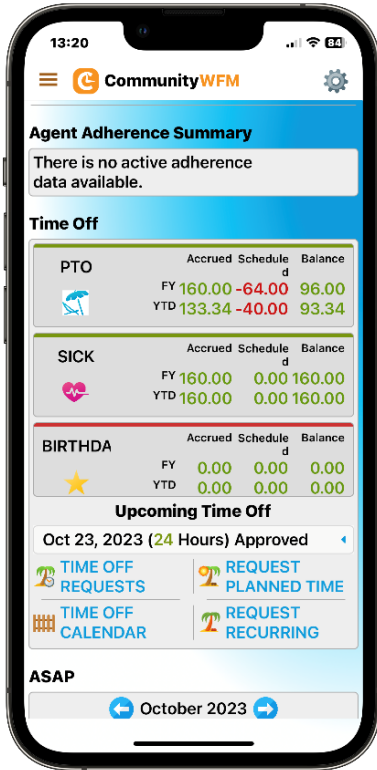
Tap the words to accept or decline, or swipe right to enable accepting the offer, or swipe left to decline or dismiss.





## Requesting time off

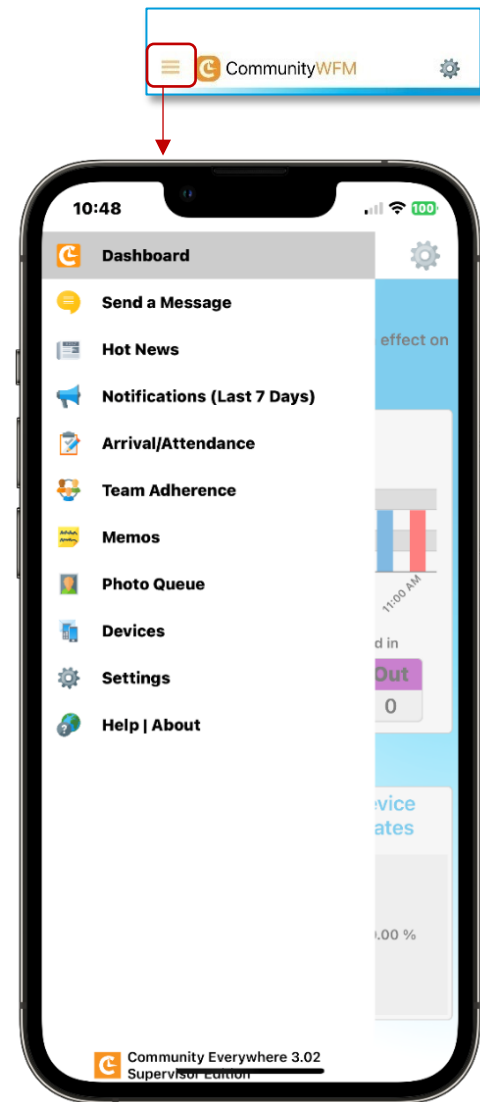
There are links to request time off or recurring time off on the dashboard, or from the Time Off Request List page. Both mimic the options on the website.



## Supervisor options

### Menu options—Supervisor

- Dashboard
  - Attendance Summary
  - Schedule Adherence Monitor
  - Today's Schedule
  - Pending Request Worksheet
- Send a Message
- Hot News
- Notifications (Last 7 Days)
- Arrival/Attendance (check people in/mark as late or absent)
- Team Adherence (Automated Schedule Adherence Monitor)
- Memos (read only)
- Photo queue
- Devices (add or remove devices for notifications)
- Settings
- Help | About



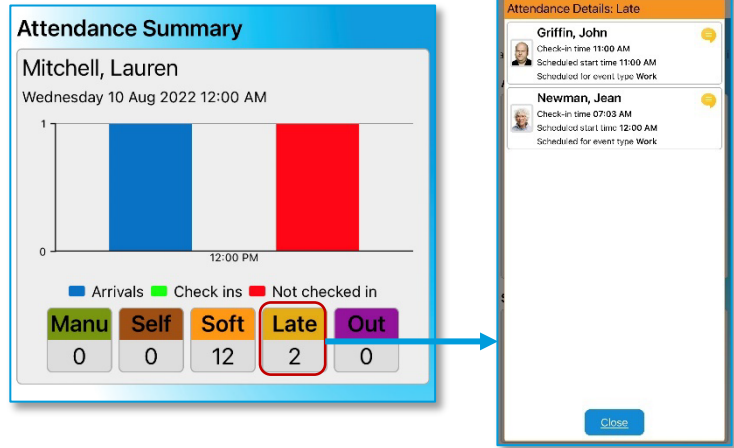
### Supervisor Dashboard

At a glance, supervisors can view their team’s attendance summary, schedule, adherence monitor, today’s schedule, and pending time off requests.



### Attendance summary

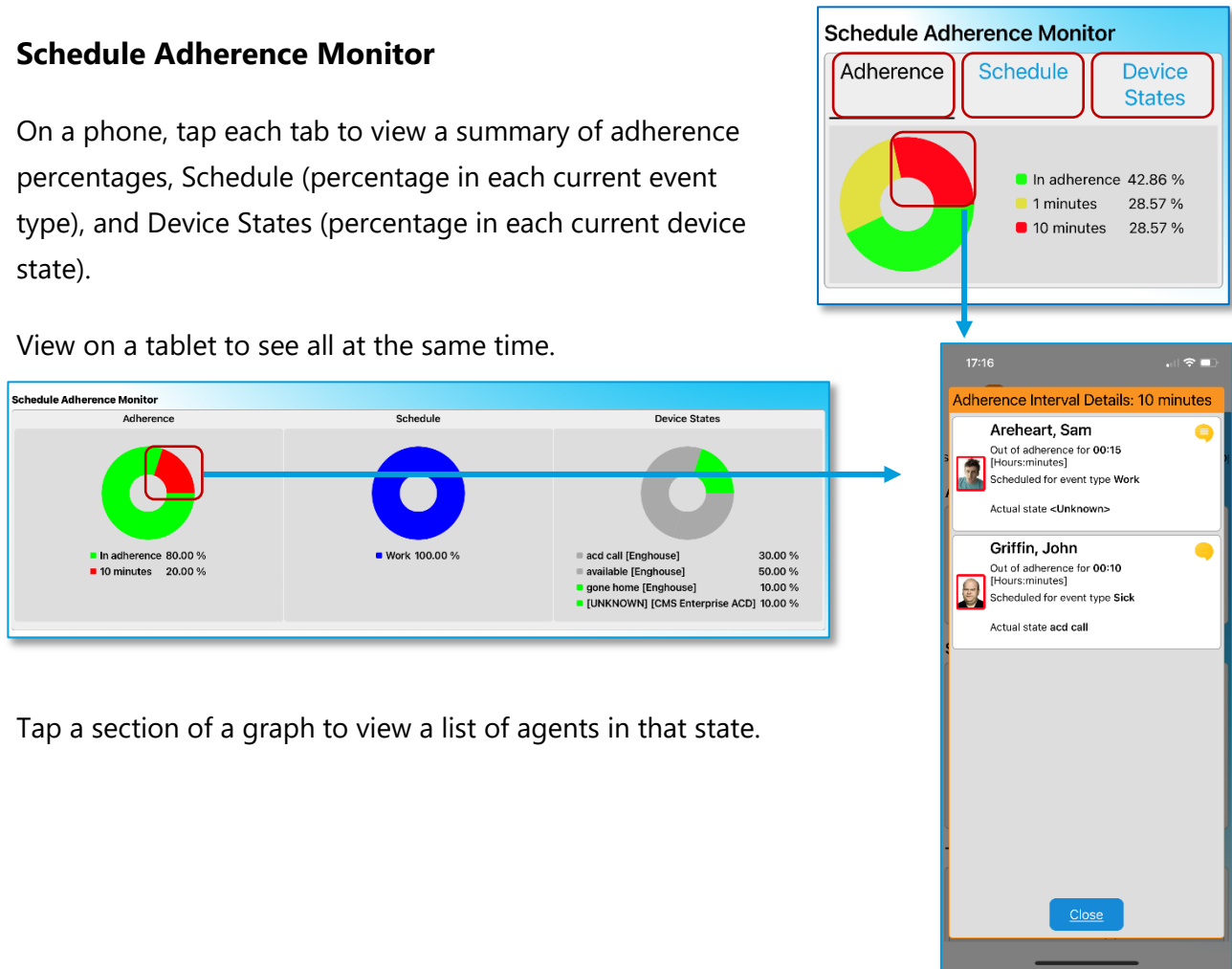
Tap a tile to view agent details.



### Schedule Adherence Monitor

On a phone, tap each tab to view a summary of adherence percentages, Schedule (percentage in each current event type), and Device States (percentage in each current device state).

View on a tablet to see all at the same time.



Tap a section of a graph to view a list of agents in that state.

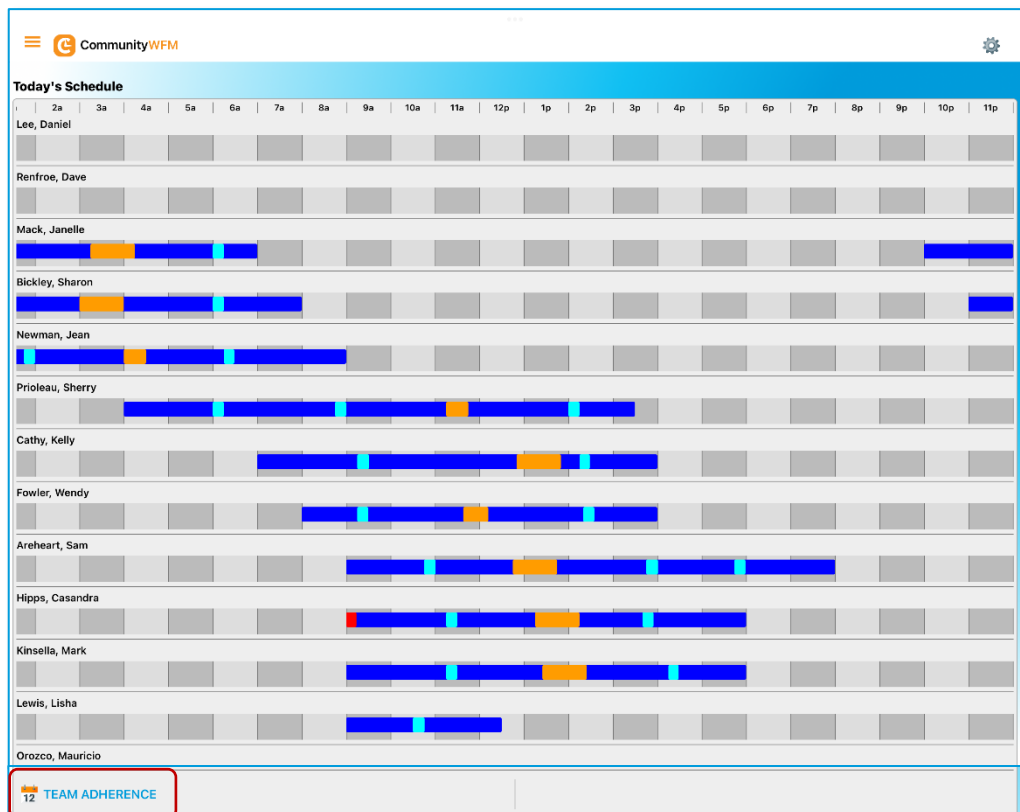


## Today's Schedule

**Phone view:** View the team's schedule for today with agent names and their schedule times.

Today's Schedule	
Newman, Jean	12:00 AM - 8:30 AM
Prioleau, Sherry	4:00 AM - 3:30 PM
Cathy, Kelly	7:00 AM - 4:00 PM
Renfro, Dave	7:00 AM - 6:00 PM
Rollison, Karen	7:30 AM - 2:00 PM
Fowler, Wendy	8:00 AM - 4:00 PM
Lewis, Lisha	8:00 AM - 6:00 PM
Areheart, Sam	9:00 AM - 8:00 PM

**Tablet view:** view the familiar schedule graph with events. Double tap on an event to view the event type and scheduled time.



Launch the Team Adherence page from the link at the bottom of the schedule.

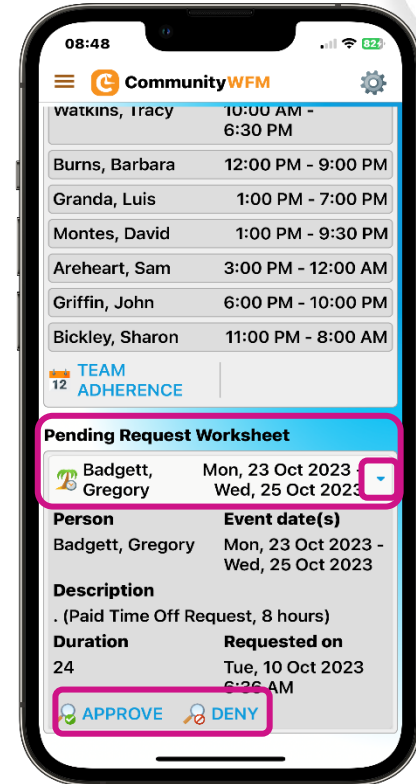


## Pending Request Worksheet

Review then approve or deny any existing time off requests.

Tap in the line to expand the request. The ◀ arrow will point ▼. You may need to scroll down to view the request. Tap again to collapse the request.

**Note:** The Role Permissions for *Minimum role authorized to edit schedules and approve agent time off requests* in the Global Settings & Preferences must be set to *Supervisor* or the Approve | Deny buttons will not be available for supervisors.



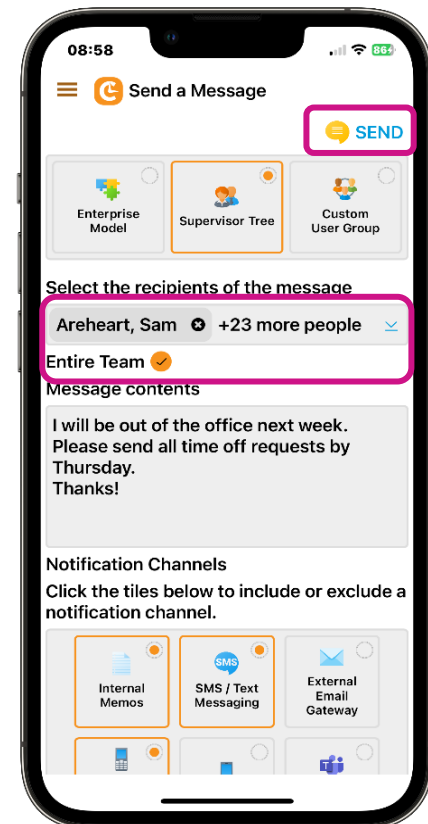
## Send a Message

Send a message to anyone on your team, a select few, or your whole team! Options include all existing notification channels.

Tap to select the Enterprise Model, Supervisor Tree, or Custom User Group to select recipients. If Enterprise Model, select the activity. If Custom User Group, select the group.

Tap the *Entire Team* radio button to select everyone in the selected group. Tap the down arrow ▼ to expand the list and refine your selection.

Add your *Message contents*, tap each notification channel you wish to use, then tap *Send*.





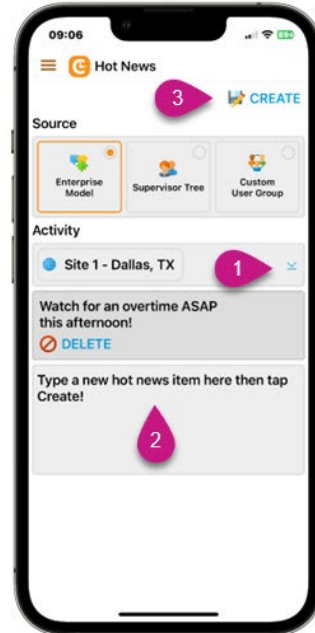
## Hot News

Add a new scrolling news item or delete existing ones.

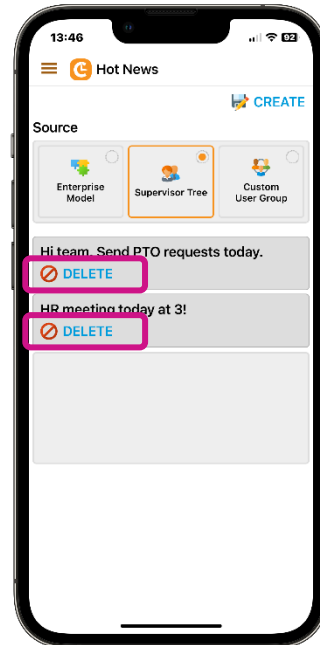
**Note:** Editing an existing Hot News item is not available in the app.

To add a new message:

1. Select recipients. If Enterprise Model, select an Activity. If Custom User Group, select the group.
2. Type the message contents.
3. Tap *Create*.



Tap *Delete* to remove existing hot new items.



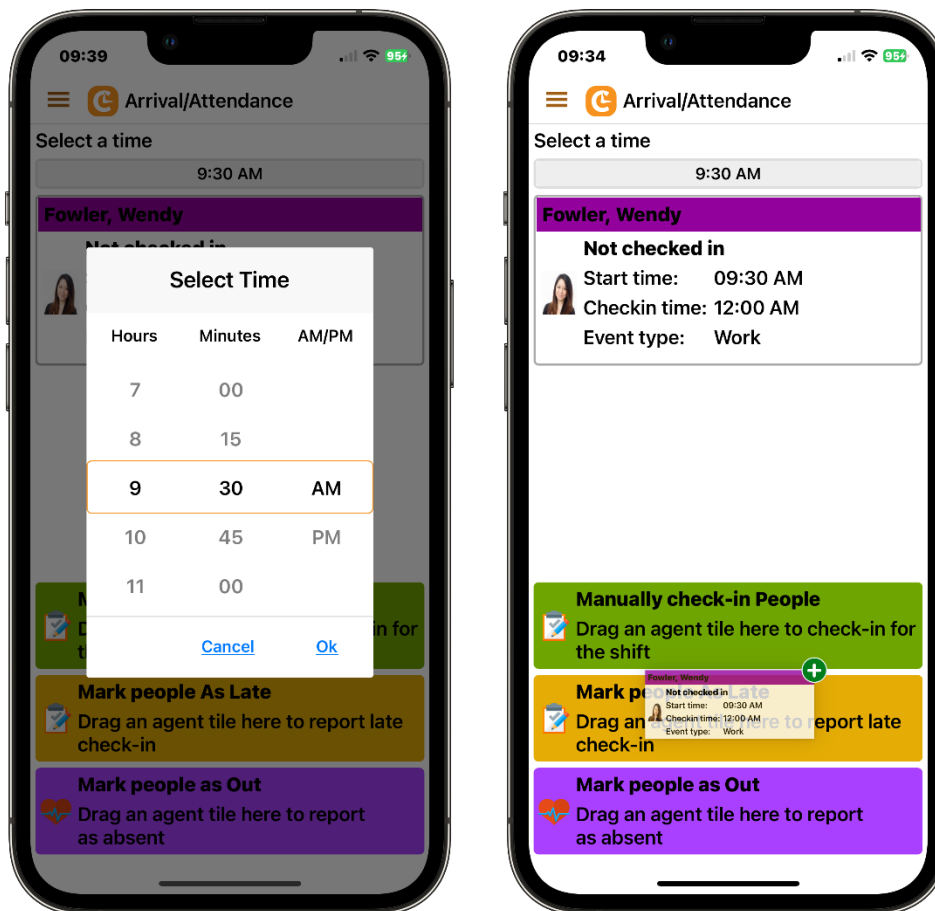
## Arrival/Attendance Summary

**Note:** This features requires [configuring the SAM](#) in the web application prior to use.

Not sure if one of your agents has arrived? View the check-in status for your team.

Did you get a message that an agent is out sick? Drag and drop the agent card to report it.

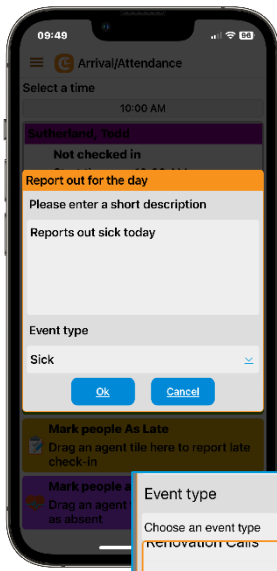
1. From the main menu select *Arrival/Attendance*.
2. Tap *Select a time* to launch the time picker and select the arrival time.
3. Tap and hold the agent card and drag it down to the appropriate option.
4. A green + sign will appear. Drop the card to apply the action.



To manually check in, simply drop the agent card on the *Manually Check-in People* tile. The agent will be checked-in (not recommended).

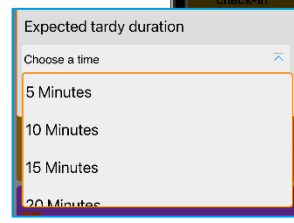
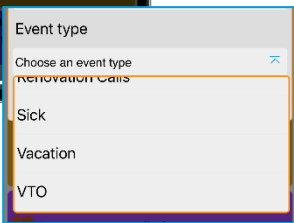
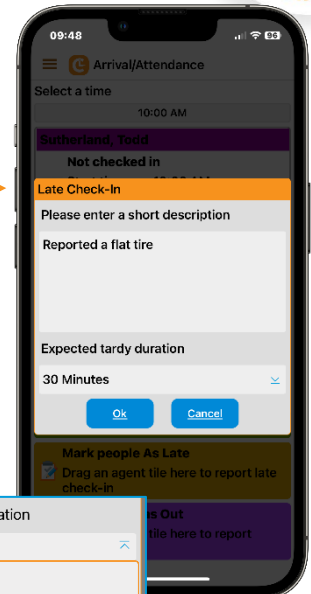


### Mark people as Late/Out



To mark as late, drop the agent card onto *Mark people as Late* tile, provide a description, and select an expected duration for the late occurrence.

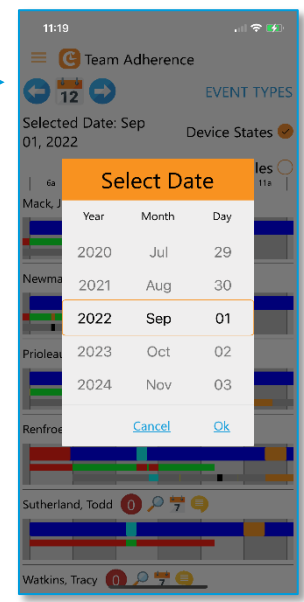
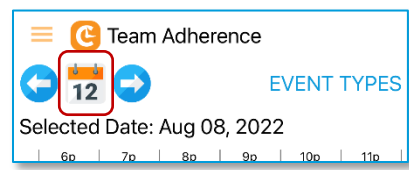
To mark as absent, drop the agent card onto *Mark people as Out*, provide a description, and select the event type.



### Team Adherence

Contains much of the same information as the adherence report, including the option to view device states (the "third rail"). Change the date, view the Event Types legend, include or exclude agents without schedules, or engage with an agent through messaging or viewing their state transactions.

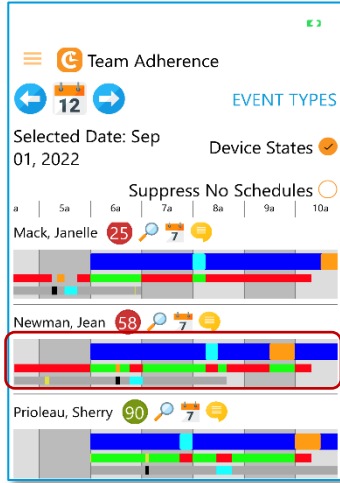
Tap the calendar icon to change the date, or tap the blue arrows to move one day forward or back.



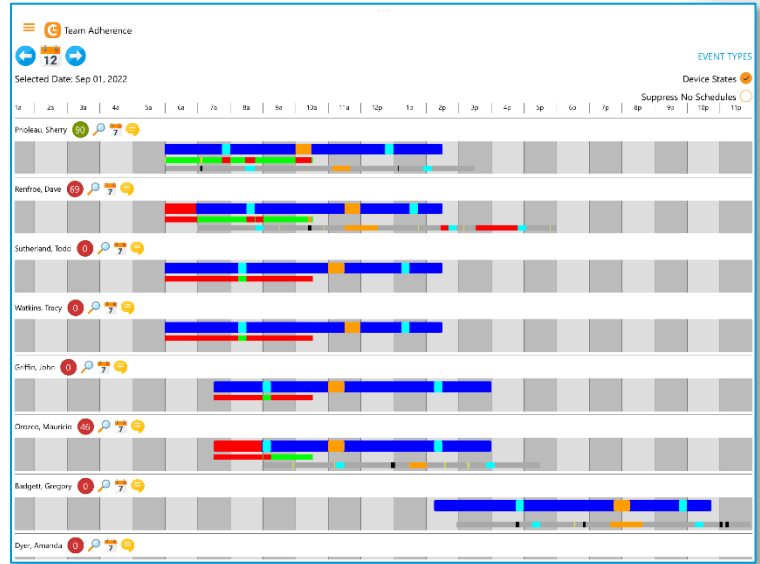
Slide the schedule right or left to view different hours of the day.



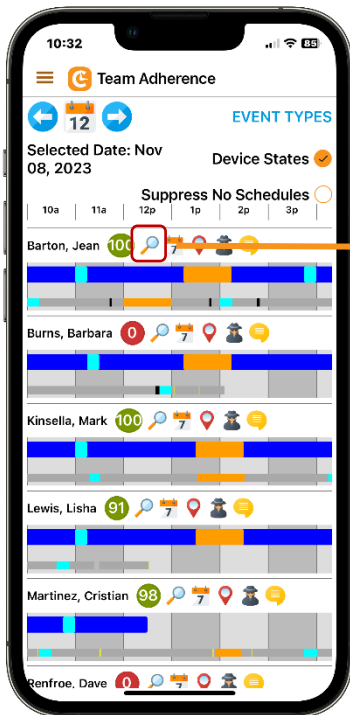
Phone View:



Tablet view:



Tap the magnifying glass to view state transactions.



Transactions

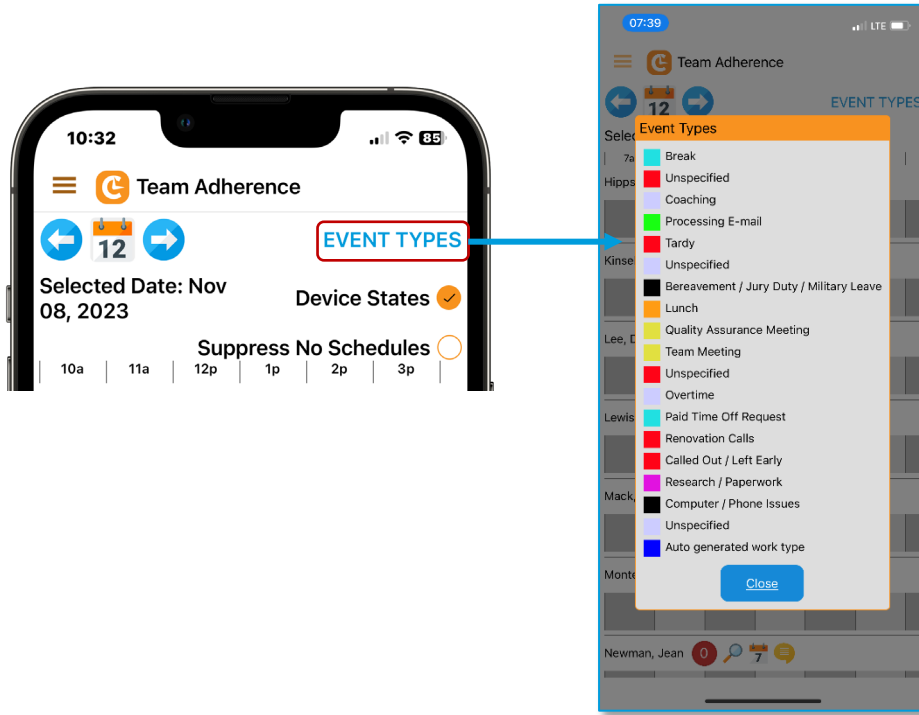
State transactions for: Lewis, Lisha  
Wednesday, 08 Nov 2023

State Name	Description	In Queue
available	Available	True
<b>Start</b>	<b>End</b>	<b>Duration</b>
9:03 AM	9:07 AM	00:00:04
State Name	Description	In Queue
acd call	On ACD Call	True
<b>Start</b>	<b>End</b>	<b>Duration</b>
9:07 AM	9:21 AM	00:00:14
State Name	Description	In Queue
available	Available	True
<b>Start</b>	<b>End</b>	<b>Duration</b>
9:21 AM	9:24 AM	00:00:03
State Name	Description	In Queue
acd call	On ACD Call	True
<b>Start</b>	<b>End</b>	<b>Duration</b>
9:24 AM	9:40 AM	00:00:16
State Name	Description	In Queue
available	Available	True
<b>Start</b>	<b>End</b>	<b>Duration</b>

Close



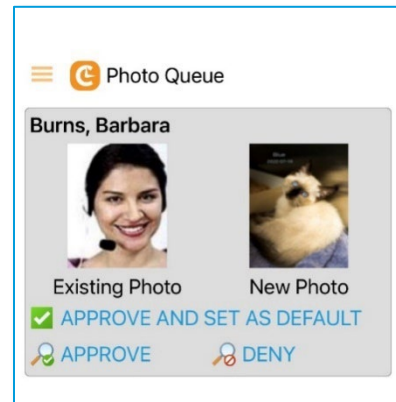
Tap *Event Types* to view the color codes for the event types or double tap an event on the schedule to view a pop-up with the event type and scheduled time.



## Photo Queue

Review and approve/deny submitted selfies. Once approved, agents will be able to select the picture for their profile, or a supervisor can approve and set as the default.

**Note:** The option to approve/deny photos must be enabled for supervisors in the Global Settings & Preferences – *Minimum role authorized to approve agent uploaded photos* for supervisors to see this option.





## Agent and supervisor options

### Notifications (Last 7 days)

View the last seven days of notifications. In the web application, these are the pop-ups. Notifications will appear for people who receive schedules and for supervisors when the Event Reminders & Pop-up Notifications role in the Global Settings & Preferences is set to include supervisors.

### Memos

Memos are read only.

**Supervisors:** To approve or deny requests, go to your dashboard.

### Devices

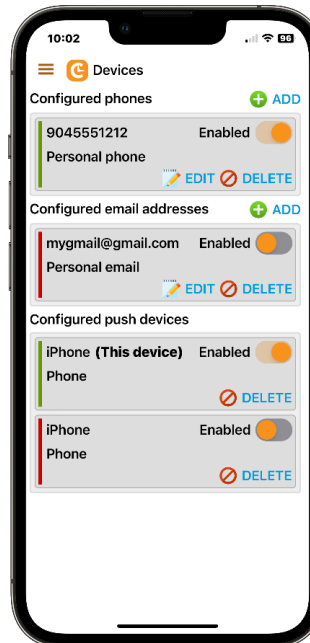
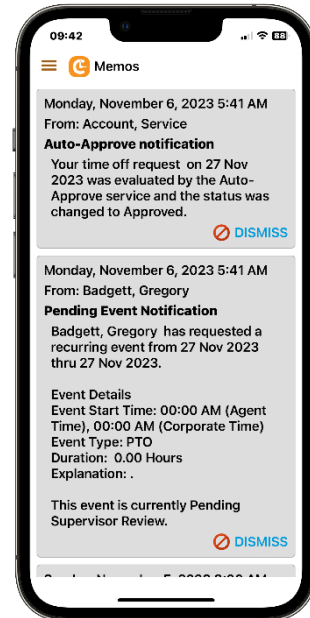
The red and green vertical bars on the left indicate which devices are active and inactive.

Add, delete, activate/deactivate, or edit your notification channels for phone, email, and push notifications.

Tap *+Add* to add a new channel.

Tap the *Enabled* toggle switch to enable or disable an individual device.

Tap *Delete* to remove a device from your list.

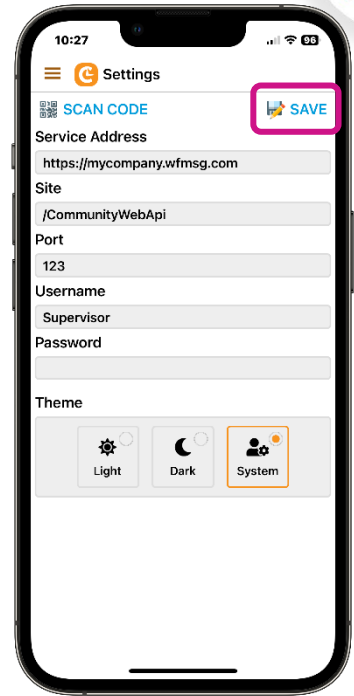




## Settings

Configure the mobile app (*Scan Code*), or change the app theme to Light, Dark, or the System in use on your device.

Tap *Save* after changing your theme or signing in.



## Help | About

Review the app information, your role information, the privacy policy, or link to the CommunityWFM support desk.

## Upload a Selfie

Upload a selfie by tapping the *Edit* button. Take a new selfie or select an existing image from the camera roll.

All images require approval from a supervisor or higher before becoming available for use.

**Note:** Supervisors cannot approve their own photos.

