Community Everywhere™ for Supervisors / Schedulers / Administrators

Webinar handout
Version: September 18, 2025

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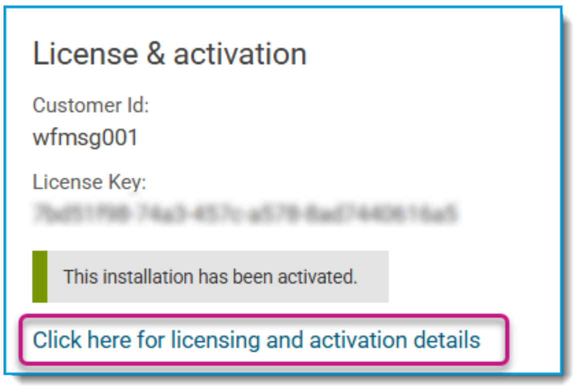
About this document

This document accompanies the CommunityWFM College webinar *Community Everywhere™ for Supervisors / Schedulers / Administrators*. 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.

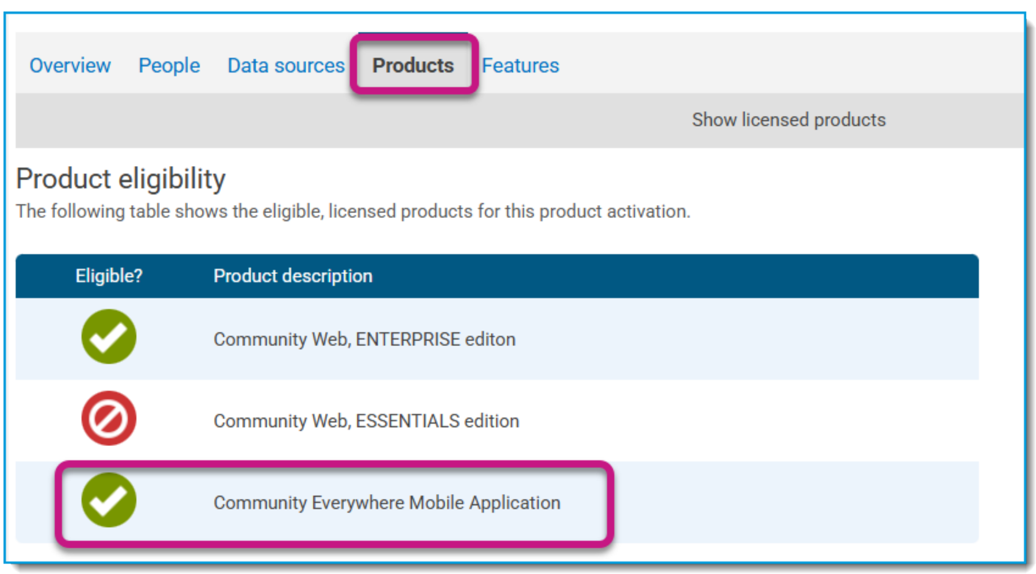
Do I have a license?

Community Everywhere™ is an add-on to CommunityWFM requiring a separate license.

1. Navigate to your name and select *Application info*.
2. Select *Click here for licensing and activation details*.



3. Select the Products tab. If there is a green check for *Eligible?* you have an active license for the Community Everywhere™ mobile application.



Don't have a license? Contact your account representative or support desk.

Setting up the App

In the web application

Add *Devices* menu item (5.x)

If using version 25.x or above, users simply log into the mobile app with their CommunityWFM email and password and do not need to use the QR code, but can still use the other QR code to add their WFM Administrator to their phone contacts list.

To set up the app in version 5.x, access the QR code on the Properties > Devices menu page. The QR code contains the application information. Alternatively, type in the URL and port number when logging in to the app.

Typically, the page is already available to agents but may need to be added for supervisors. If you need assistance with editing the application menus, contact your support team.

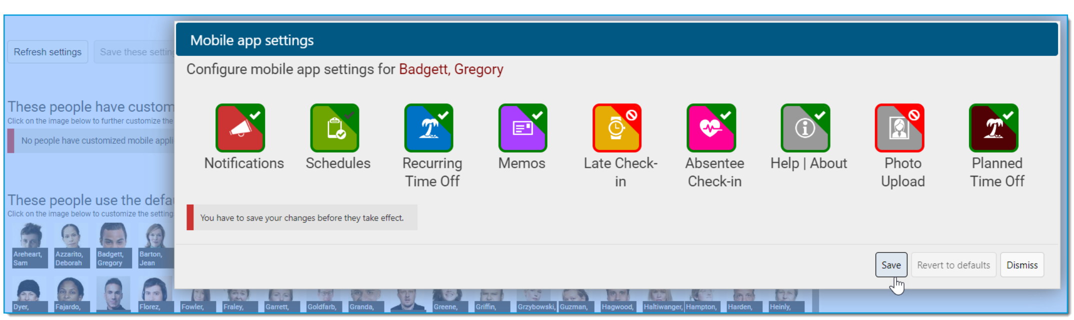
Configure Community Everywhere

Settings > Application settings > Administrative settings > Mobile application setup

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

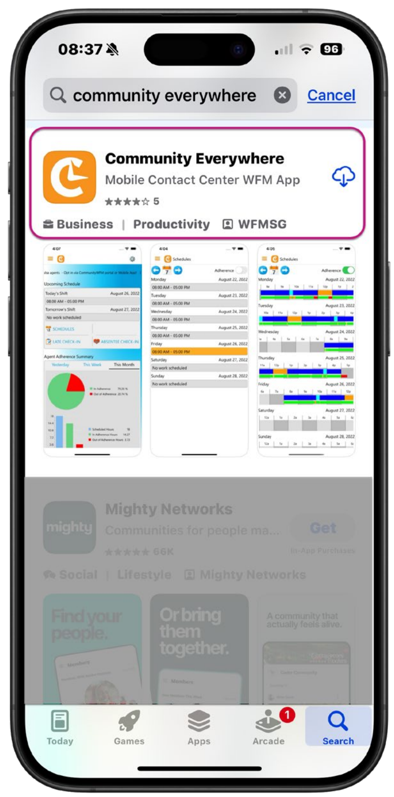
To customize the settings (e.g., if there is an agent who has abused the photo upload or late check-in):

1. Click on an agent's picture to open the mobile app settings options for that agent.
2. Click each icon you wish to remove from the mobile app options. The border will turn red. Click again to reenable the option.
3. Click *Save*.



People with customized settings appear above the people with the default settings.

Downloading the App



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

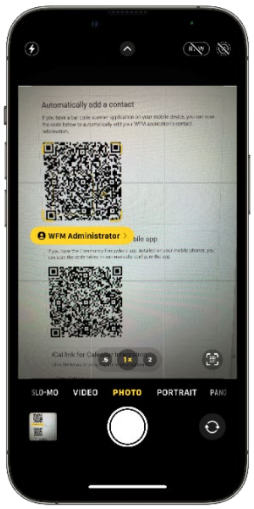
If there is no license, you may be able to download the app but will not be able to use it. Contact your account representative to discuss obtaining a license.

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

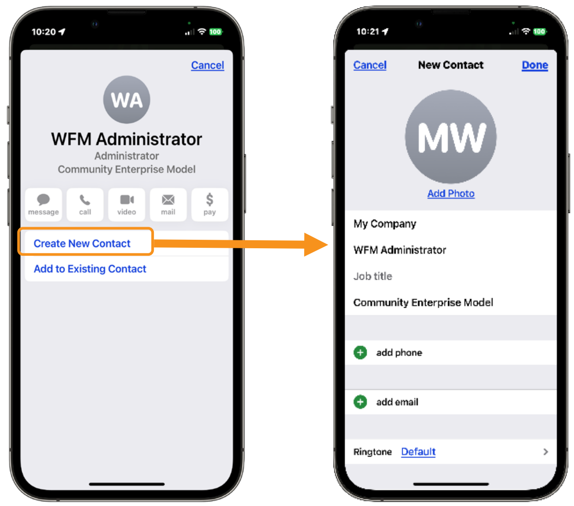
Note: Older versions of the app may not support all features.

Setting up the App

Automatically Add a Contact



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



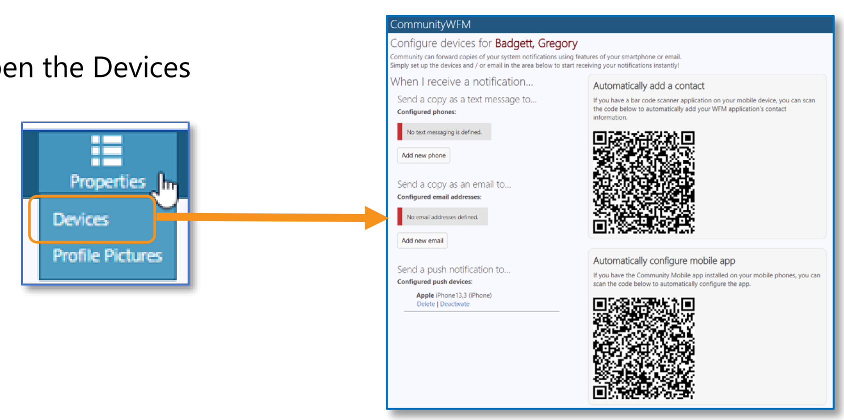
Version 25.x: Enter email and password

With version 25.x, you can skip the QR code setup to configure the app. You only need to log in with a valid email and password. If your center uses SSO, you only need to enter your email, then will be directed to your SSO authentication screen to confirm your credentials.

Version 5.x: Scan the QR code

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

1. In the desktop application, open the Devices page (Properties > Devices).



2. Open the app on your device and tap SCAN CODE.

   If needed, allow access to your camera (required). **Note:** you must use the in-app QR code scanner (*Scan Code* button) for this step.

3. Scan the **bottom** QR code on the Devices page. This will add the business information and username to the login page.

4. Type your CommunityWFM password.

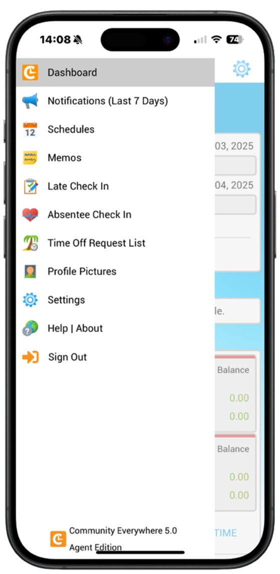
5. Tap SIGN IN

Using the App

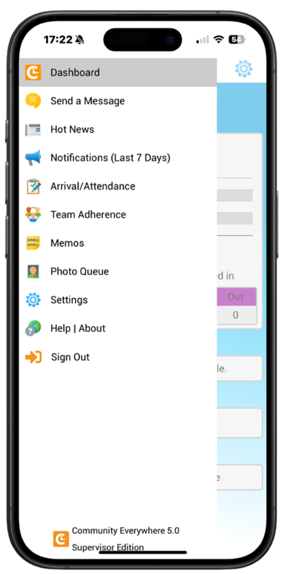
Many of the modules from the desktop view are available in the mobile app on a phone or tablet. Access and options depend on role permissions.

1. Agent
2. Supervisor
3. Scheduler
4. Administrator

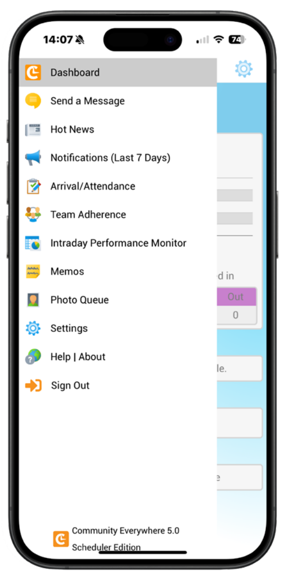
Tap the hamburger menu icon (≡) in the upper left to view the options for your role.



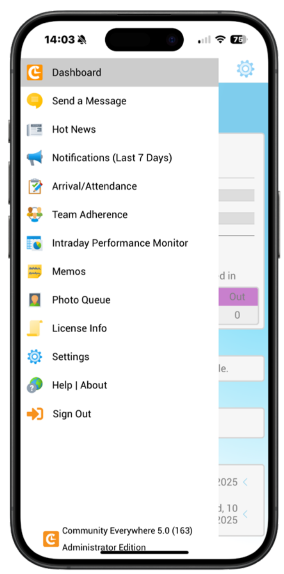
Agent



Supervisor



Scheduler



Administrator

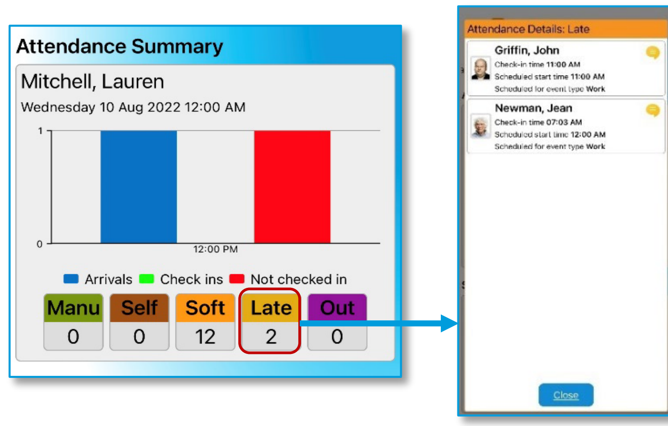
Dashboard

At a glance, supervisors | schedulers | administrators can view—

- Attendance Summary
- Schedule Adherence Monitor
- Today's Schedule
- Pending Request Worksheet

Attendance summary

Tap a tile to view agent details.

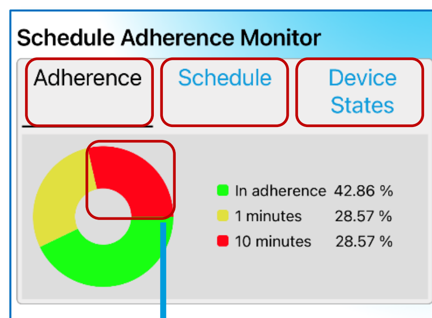


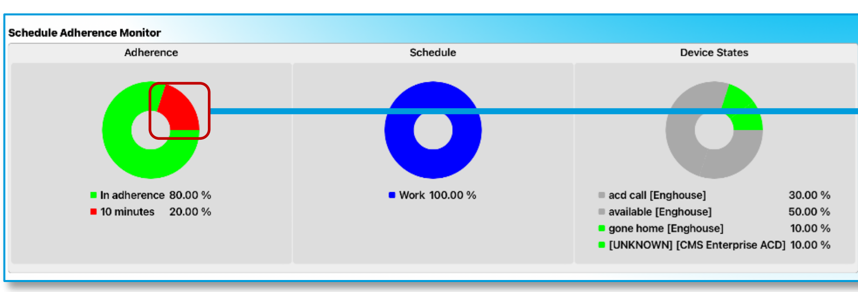
Schedule Adherence Monitor

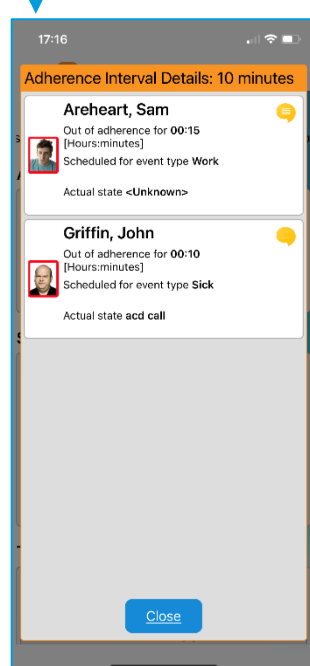
On a phone, tap each tab to view a summary of adherence percentages, Schedule (percentage in each current event type), and Device States (percentage in each current device state).

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.





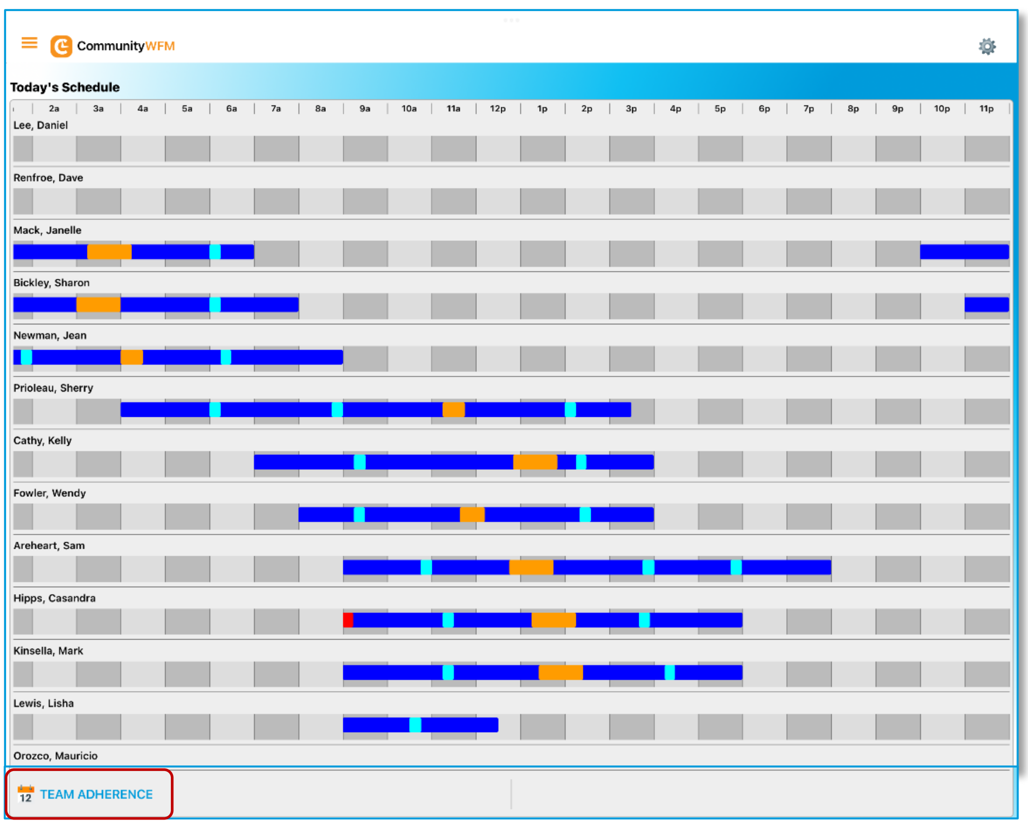


Today's Schedule

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

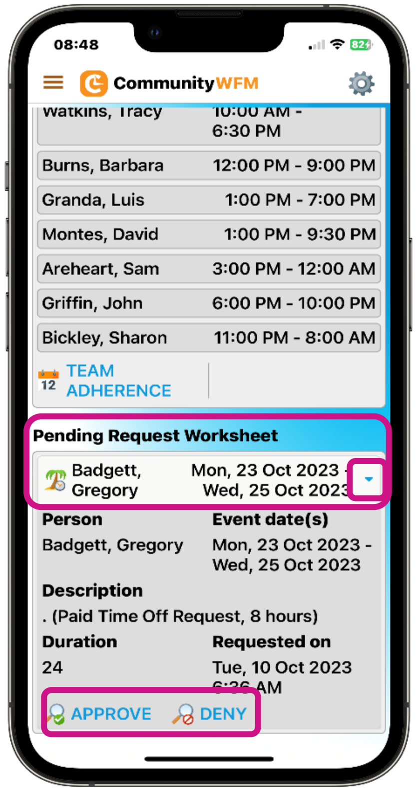
To view details, tap *Team Adherence* at the bottom of the panel.

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

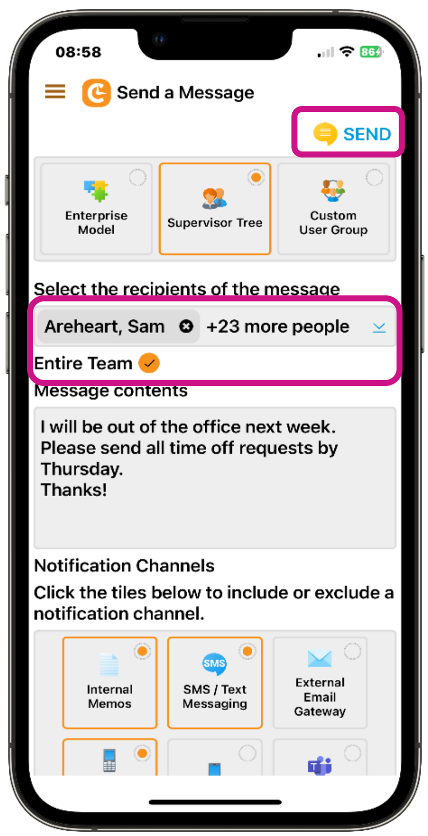


Review then approve or deny any existing time off requests.

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: To see the Approve | Deny buttons, 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 include your role.

Send a Message



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

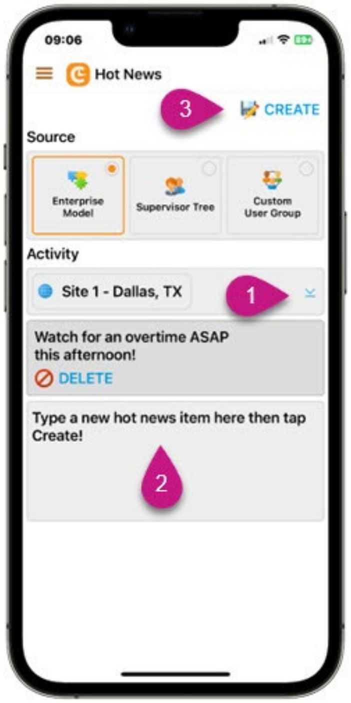
Tap to select the Enterprise Model, Supervisor Tree, or Custom User Group to select recipients. If Enterprise Model, select the activity. If Custom User Group, select the group.

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.

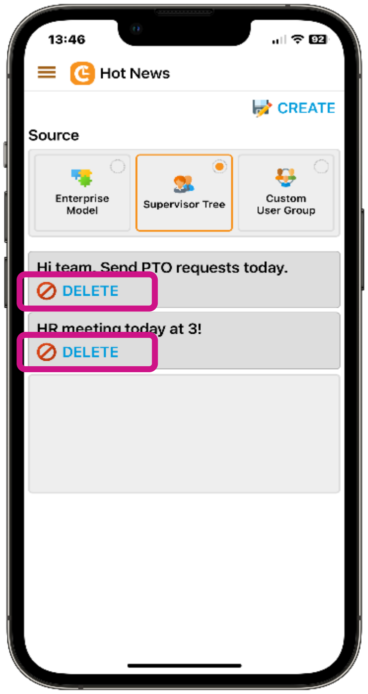


Note: *Editing* an existing Hot News item is not available in the app.

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.



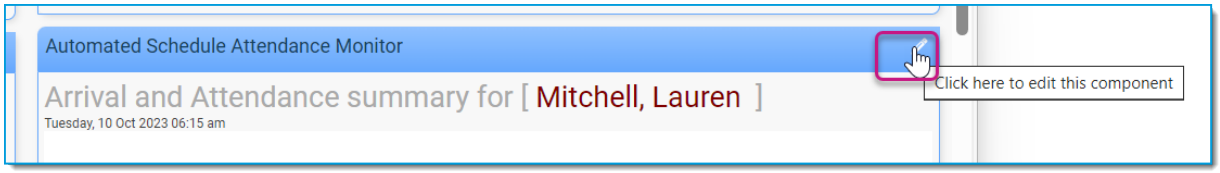
Arrival/Attendance

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

Note: This feature requires configuring the Automated Schedule Attendance Monitor (ASAM) in the web application prior to use.

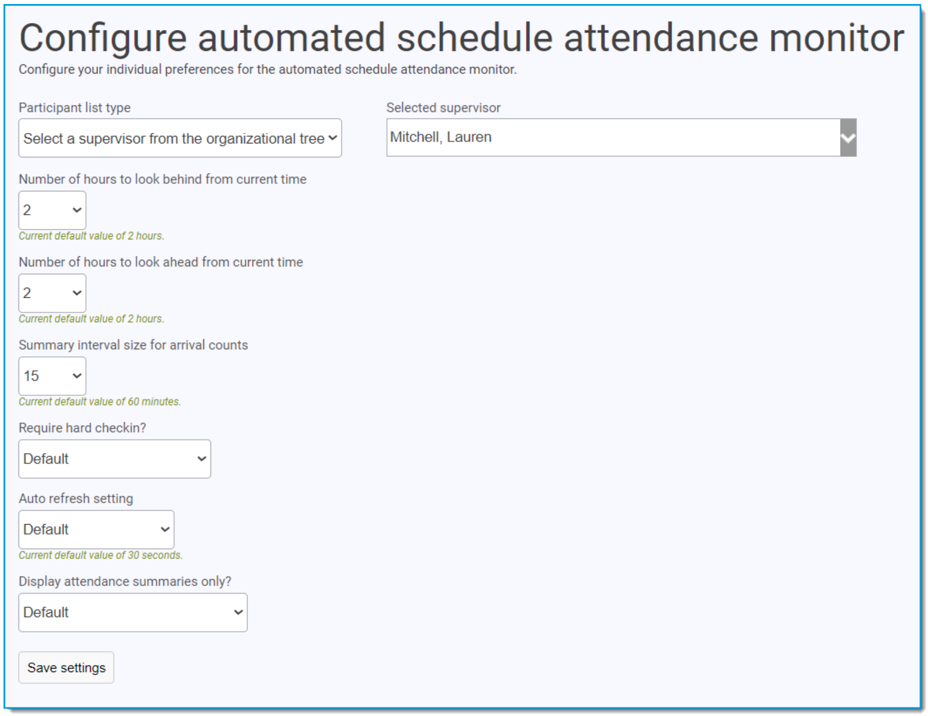
Configure ASAM in the web application

Add the ASAM to the home page (hover over picture > Personalize > Choose your content tab > wide column > select *Automated Schedule Attendance Monitor)*. On the Today page, 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.

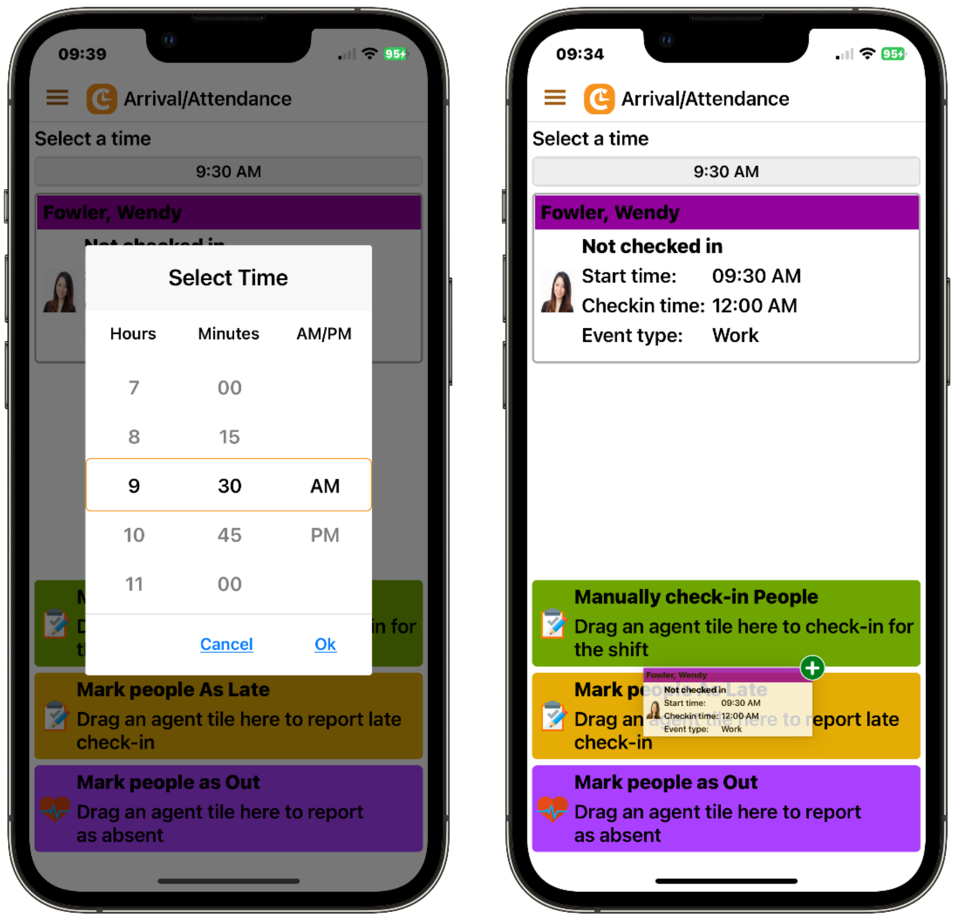
Save your settings.



Report an agent as late or absent

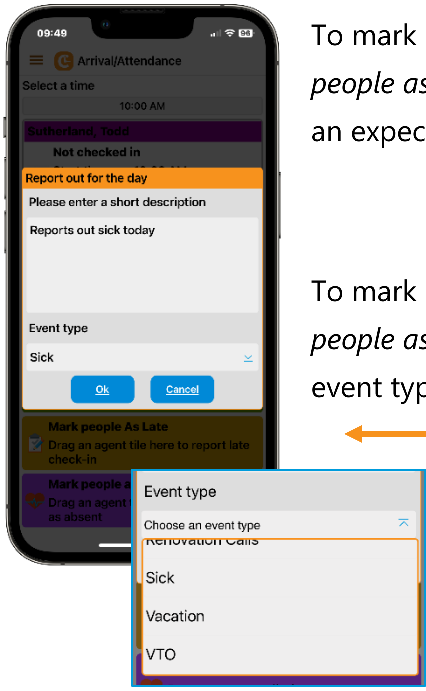
Did you get a phone call or email that an agent is out sick? Drag and drop the agent card to report it in CommunityWFM.

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.



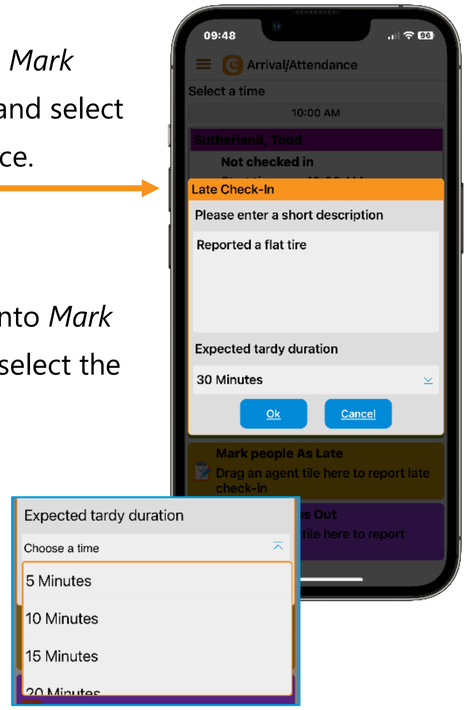
To manually check in (not recommended), simply drop the agent card on the *Manually Check-in People* tile. The agent will be checked-in.

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 occurance.

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



Team Adherence

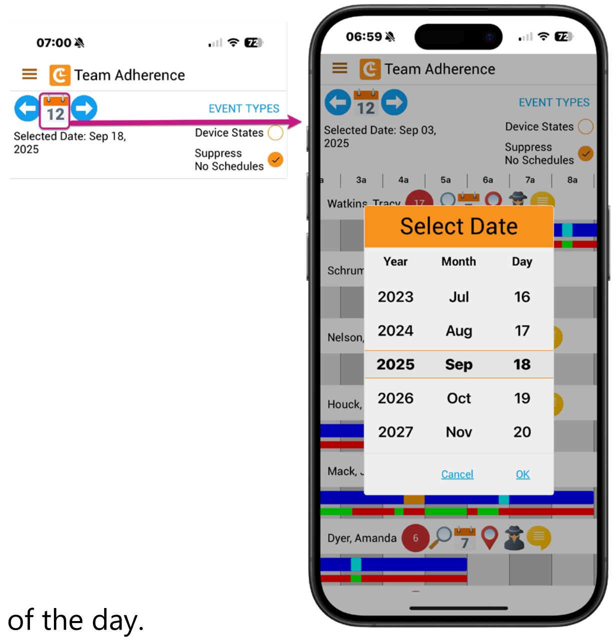
Contains much of the same information as the adherence report, including the option to view device states (the "third rail"). Change the date, view the Event Types legend, include or exclude agents without schedules, or engage with an agent through messaging or viewing their state transactions. **Note:** This feature requires configuring the Schedule Adherence Monitor (SAM) in the web application prior to use.

Configure the SAM in the web application

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.

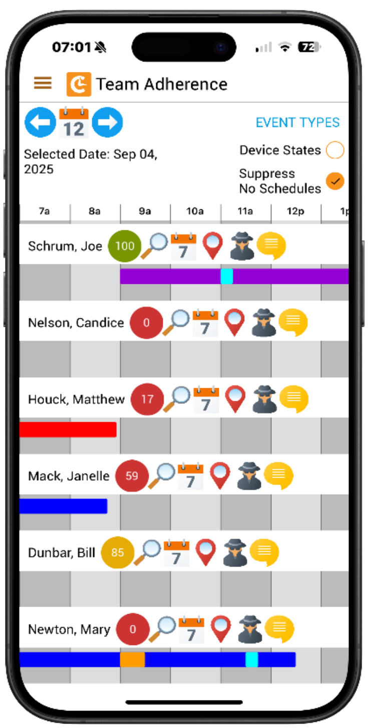
View adherence

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

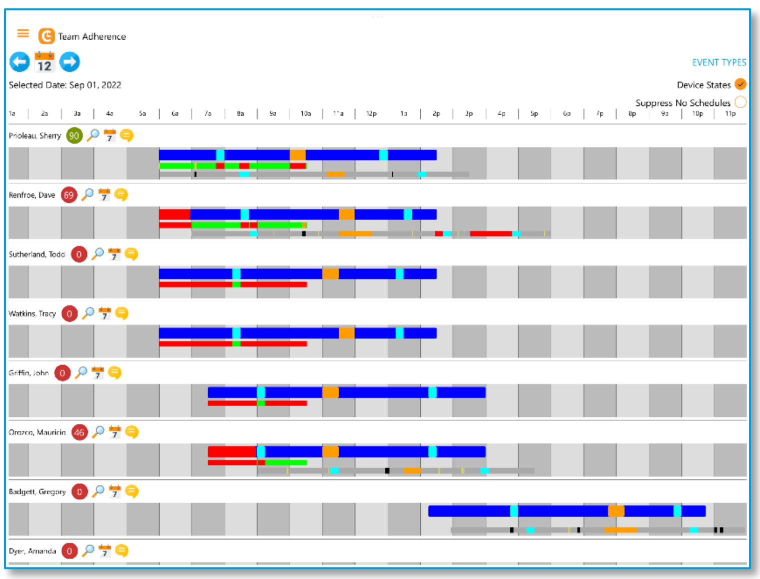


Slide the schedule right or left to view different hours of the day.

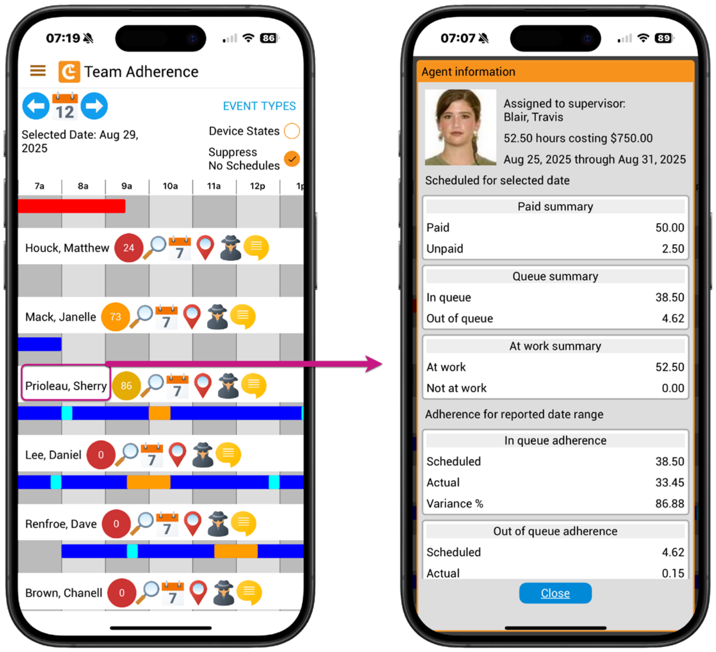
Phone View:



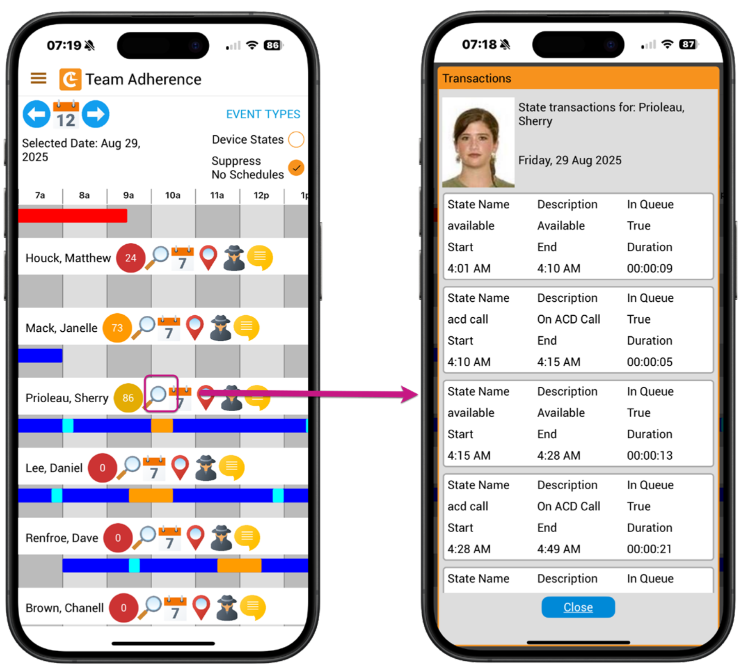
Tablet view:



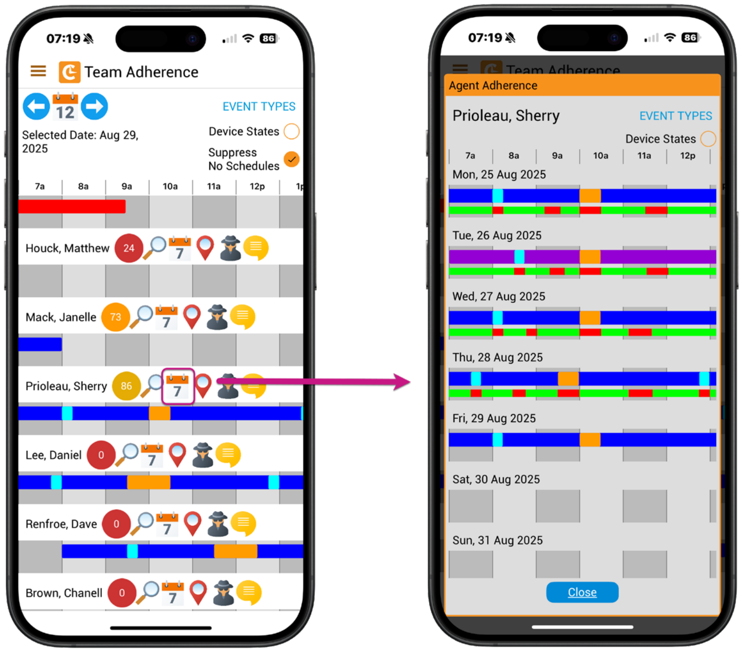
Tap the agent name to view a summary of agent adherence information.



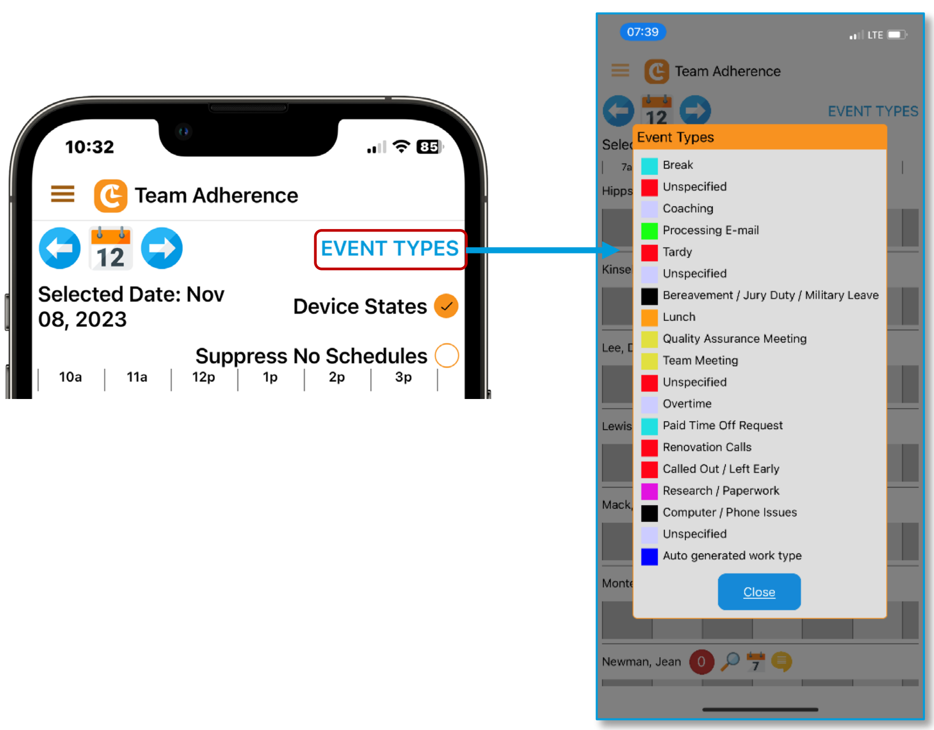
Tap the magnifying glass to view state transactions.



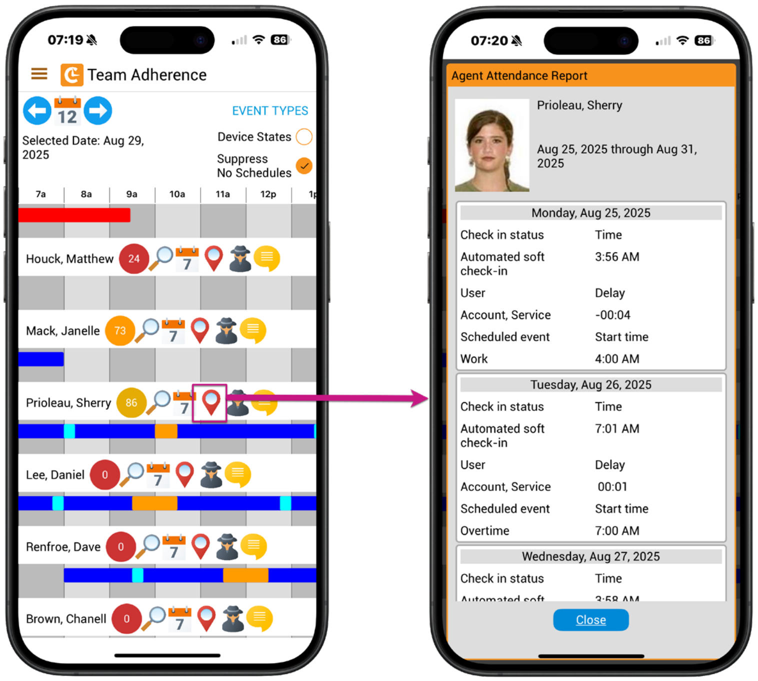
Tap the calendar icon to view the adherence for the week.



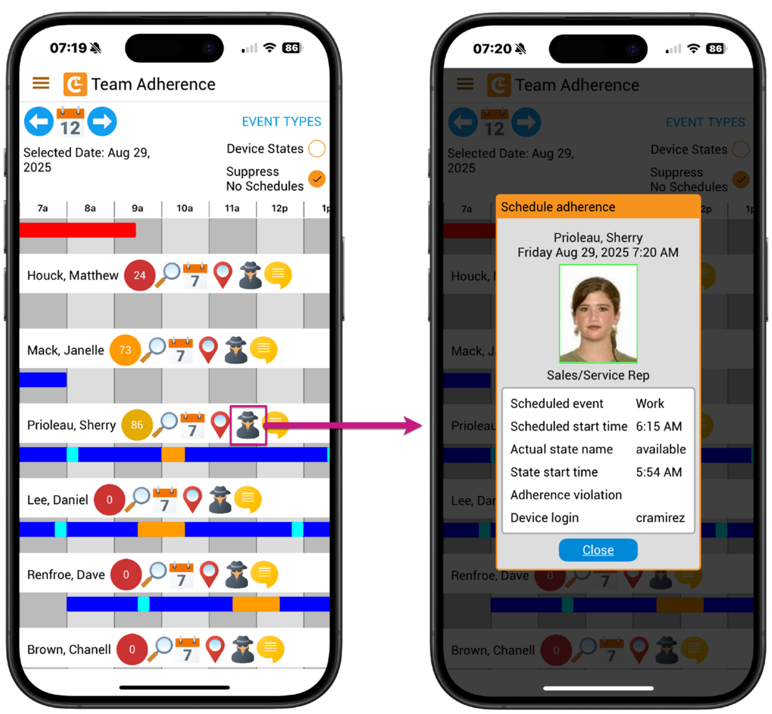
Tap *Event Types* to view the color codes for the event types or double tap an event on the schedule to view a pop-up with the event type and scheduled time.



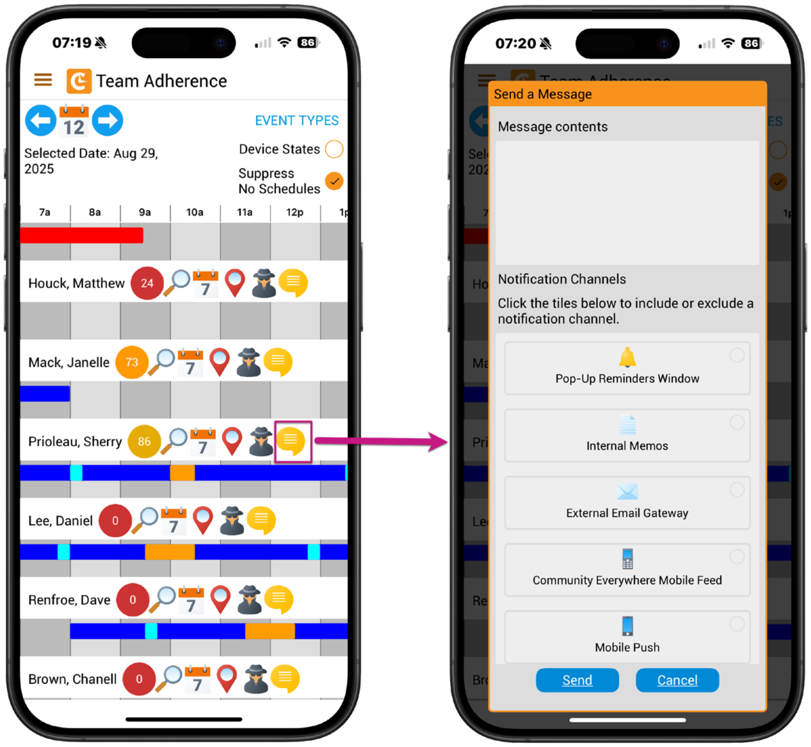
Tap the location pin to view the agent attendance report for the week.



Tap the 'spy' icon to view today's adherence.



Tap the message icon to send a message to this agent.



Intraday Performance Monitor

View graphs for today's contact volume, AHT, staffing analysis, and service analysis.

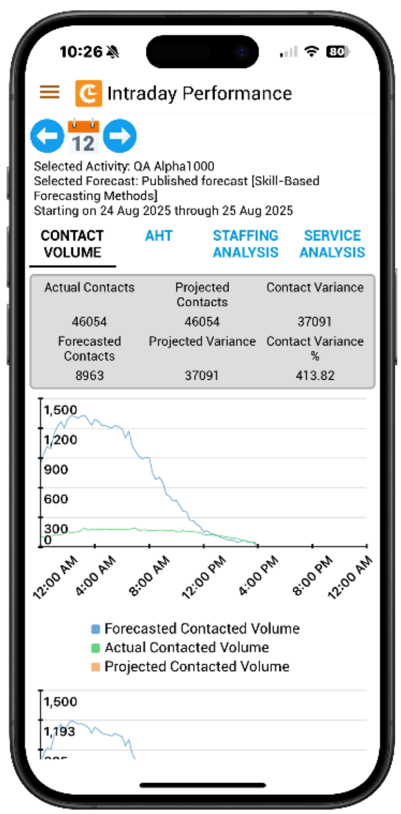
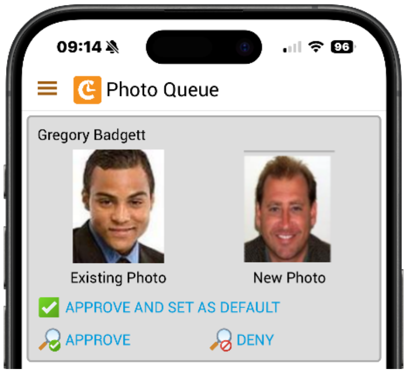


Photo Queue

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.



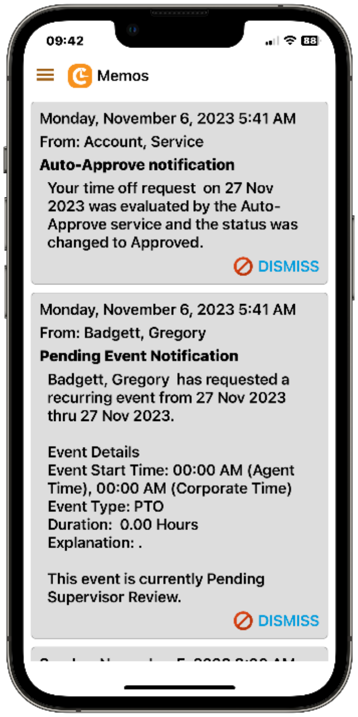
Note: To see this option, the ability to approve/deny photos must be enabled for your role in the Global Settings & Preferences – *Minimum role authorized to approve agent uploaded photos.*

Notifications (Last 7 days)

View notifications received within the last seven days. In the web application, these are the pop-ups. Notifications will appear for people who receive schedule notifications and for other roles when set in the Event Reminders & Pop-up Notifications role in the Global Settings & Preferences.

Memos

Memos are read only.



Supervisors: To approve or deny time off requests, go to the Pending Request Worksheet on your dashboard.

Devices

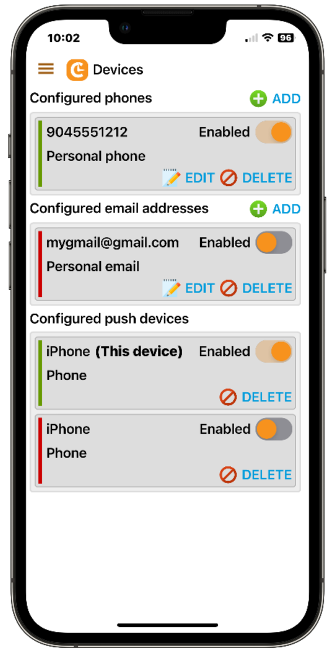
The green and red vertical bars on the left indicate which devices are active and inactive.

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.

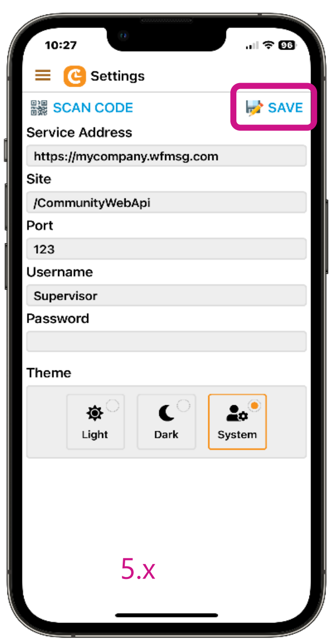
Tap *Delete* to remove a device from your list.

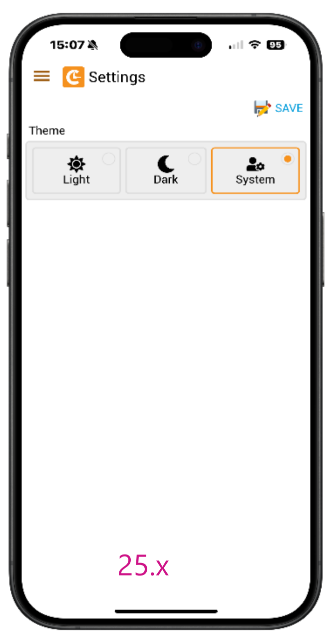


Settings

In version 5.x, configure the app by scanning the code in the web version, or change the app theme to Light, Dark, or the System in use on your device. In version 25+, only changing the theme is an option.

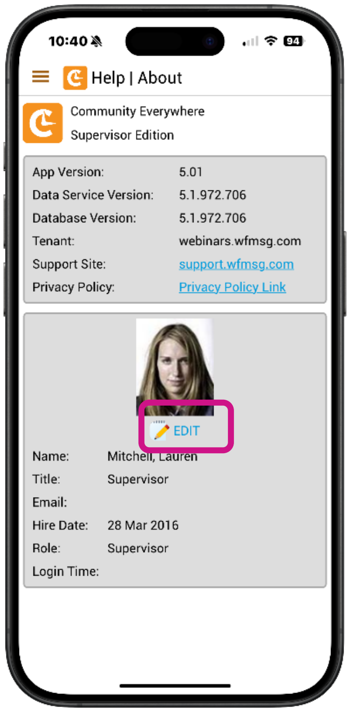
Tap *Save* after changing your theme or signing in.





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.

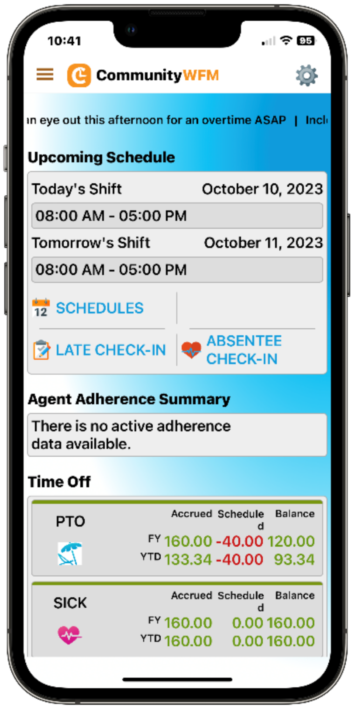
Note: Supervisors cannot approve their own photos.

Agent options

Agent Dashboard

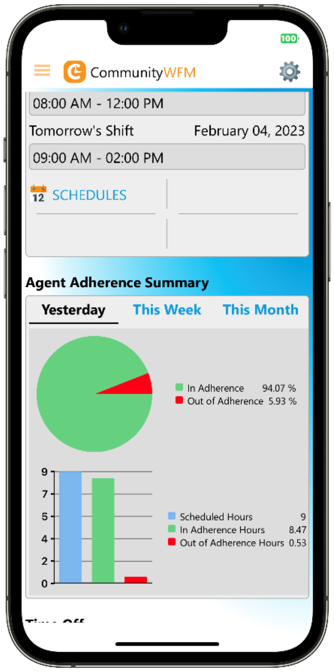
At a glance, agents can view their upcoming schedule, check in as late or absent, view their adherence summary, time off accruals, upcoming time off, and view available ASAPs.

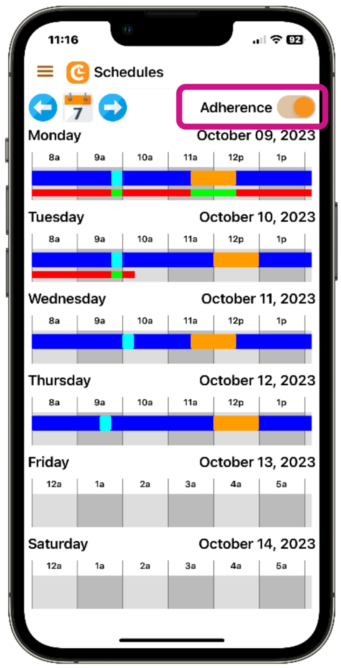
While today and tomorrow's shifts show on the dashboard, taping *Schedules* will display the schedule for the week.



Adherence

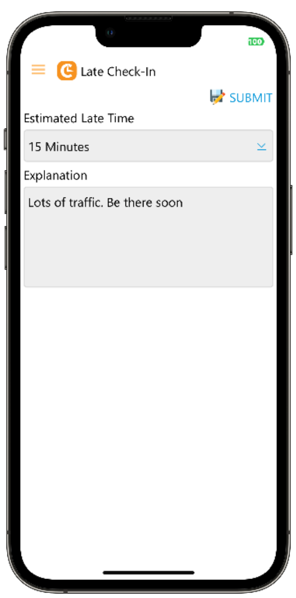
The dashboard includes an adherence summary, or on the Schedules page, toggle the adherence button to view adherence.





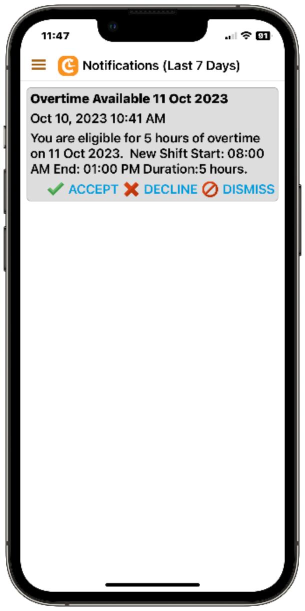
Notify supervisor of late arrival or absence

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.

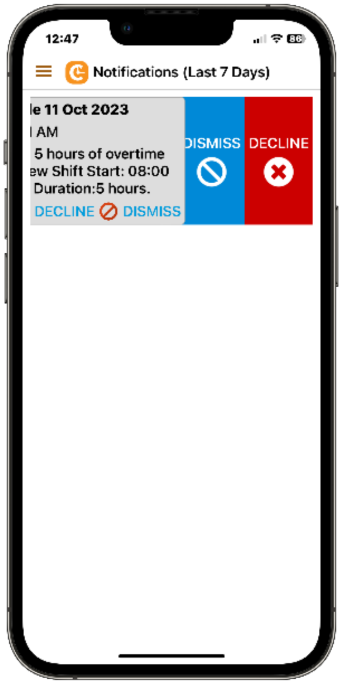


Accept or decline ASAPs

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. Both mimic the options on the website.