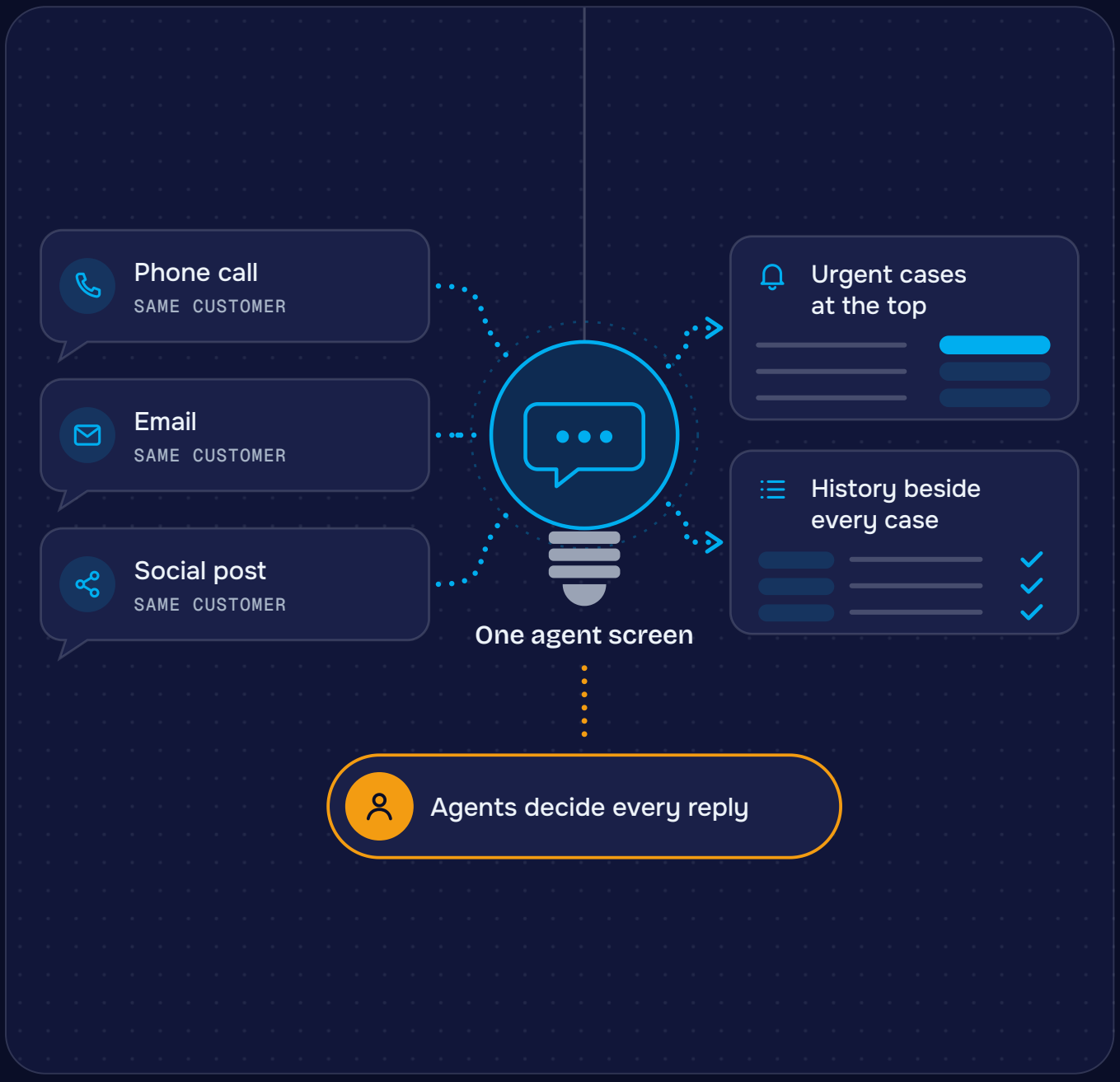
Unified agent desktop

The customer's whole story on one screen, so nobody has to explain it twice.



10:05 am The same customer rings again

6 AM 12 PM 6 PM 12 AM 6 AM

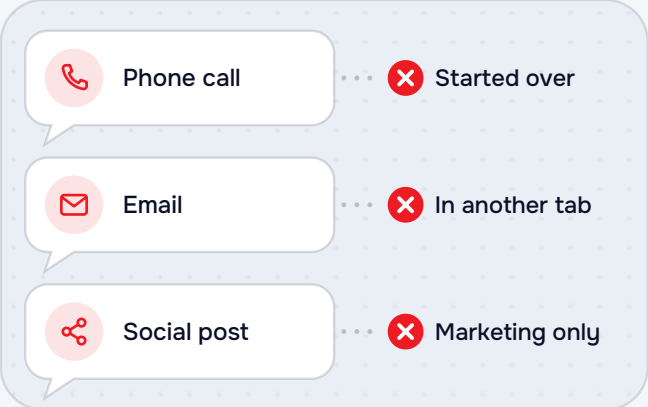
Who it is for

Service teams at medium and large businesses that handle a lot of contacts across several channels, where each agent sees only part of the customer's story.

- CUSTOMER SERVICE TEAMS
- MULTI-CHANNEL HELP DESKS
- TEAMS ON SEVERAL SYSTEMS

Every agent starts from nothing

- A customer emails on Monday, rings on Tuesday and posts on social on Wednesday. Each time it's a new agent.
- Agents keep several systems open and copy details between them while the customer waits.
- Urgent cases, like a customer about to leave or a complaint going public, wait behind password resets.



BEFORE: THE SAME STORY TOLD THREE TIMES

What we set up

One screen for your agents. Calls, emails, chats and social messages arrive in one queue, and each opens beside the customer's record from your CRM. AI sorts the queue by rules you write and drafts a short summary after each conversation. Your agents decide what to say.

Every contact in one queue

It opens beside the customer's orders, past cases and notes, so whoever picks up can carry on.

Urgent cases go first

You decide what counts as urgent. Those cases jump the queue and go to the team you chose.

Linked to your CRM

We link your CRM to the systems that hold the answers, then clean and move old records across.

How it works

WE DO THIS · TOGETHER

1 · TOGETHER

We map how a contact moves today

Which channels your customers use, which systems hold their history, what agents retype and which cases are urgent.

2 · TOGETHER

You set the rules

What counts as urgent, where each type of contact goes and what each field means. Nothing is built until you agree them.

3 · US

We connect the systems and move records

Your CRM is linked to the systems your agents need. Old records are cleaned, de-duplicated and moved, and your staff check samples.

4 · TOGETHER

Your agents try it before go-live

A few agents and a team lead work real cases on the new screen. We rehearse the switch-over, and your side signs off before go-live.

What you get

- ✓ One agent screen with each customer's history beside the conversation
- ✓ A queue that raises urgent cases by rules you set
- ✓ Your CRM connected to the systems your agents need, agreed with you first
- ✓ Customer records cleaned, de-duplicated and moved, with samples your staff check
- ✓ A draft summary after each conversation, which the agent checks before it's saved
- ✓ Guides and training for agents, team leads and the people who run it

What we need from you

- Your channels, systems and tools, and access to them for the build
- A data steward who decides what each field means
- A few agents and a team lead to test real cases
- Your rules on personal data, payments and call recording
- One person who signs off the rules

Timeline We agree the timeline with you before we start.

You stay in control

Check it, pause it or stop it at any time.

You write the rules

You choose what it may route without asking. If you'd rather a person approved each step, we set it up that way.

A person handles every case

Every conversation goes to one of your agents. Nothing reaches a customer unless an agent says it or sends it.

The record shows what it did

When it routes a contact on its own, the record shows it. No summary is saved until an agent checks it.

Change, pause or stop it

Your team leads can change the rules, and you can pause or stop automatic routing at any time.

Questions people ask

Do we have to replace our CRM?

Not always. Often it's quicker to connect the CRM or helpdesk you already pay for. If it can't do what your agents need, we say so first.

Will the software talk to our customers?

No. It sorts the queue and drafts summaries for your agents. Nothing reaches a customer unless an agent says it or sends it.

Will it work with our phone system?

Most agent screens connect to phone systems, so the customer's record can open as a call comes in. Older on-site systems may need extra work.

Who can see our customers' data?

Access should follow job roles, with every view and change logged. Who sees what is agreed with you.

Tell us which systems your agents juggle

Bring a recent case where a customer had to repeat themselves. In a free consultation we'll show you where one screen would save the most time.

We quote every project in writing after a free consultation, with the timeline agreed in the same quote.

webvijayi.com
care@webvijayi.com
Book a free consultation: **webvijayi.com/contact**