

5.2 Call Forwarding

Bright Pattern Documentation

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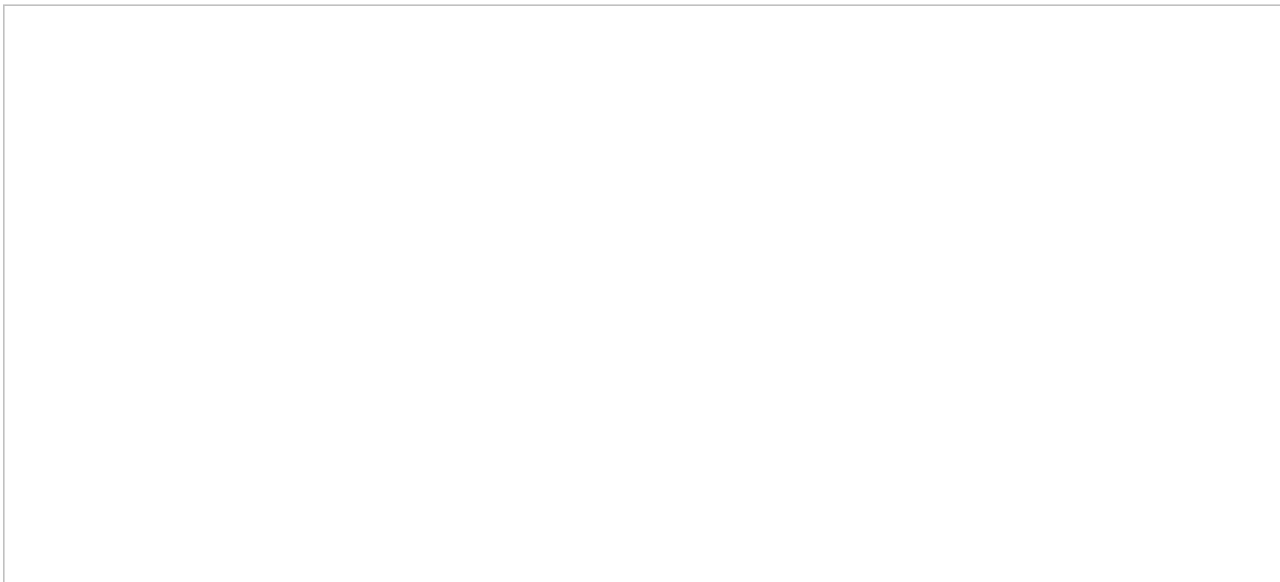
Configuring Your Voicemail

Calls made directly to your extension number can be forwarded to your voicemail when you cannot answer them. You can record your personalized voicemail greetings and activate/deactivate your voicemail via your Agent Desktop application. Up to three different messages can be recorded and used as greetings in various situations.

Note that the system uses email for [delivery of voicemail messages](#). Before you configure your voicemail settings, make sure that you have an email address specified in *Settings > User Profile > Contact Info > Email*.

Step 1: Navigate to the Forwarding and Voicemail tab of the user profile settings.

- Click **Settings**, select **User Profile**, and click the **Forwarding and Voicemail** tab.
- Note that this tab contains settings related to call forwarding and voicemail functions. If you do not see any setting related to voicemail, unselect the **Forward all calls...** checkbox first.
- Notice the fields for *Enable voicemail (requires email address)* and *Send to voicemail after* but do not make changes to them yet. You will come back to these fields after you have recorded your voicemail greetings.



Forwarding and Voicemail Settings

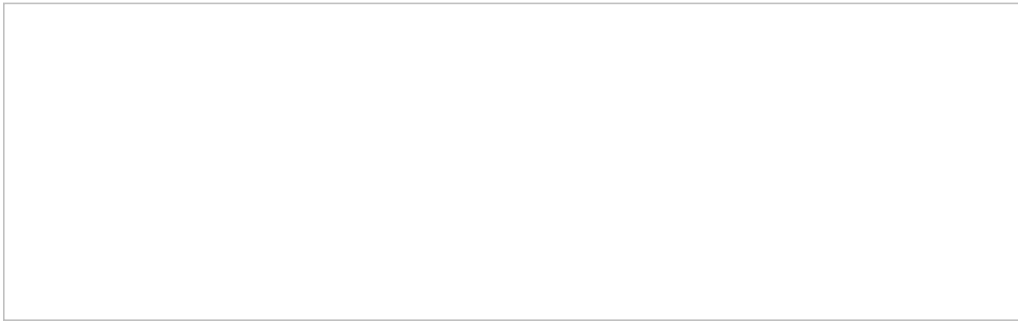
Step 2: Create a personal greeting.

The system provides a prerecorded generic voicemail greeting: *The person at extension [your extension number] is not available. Please leave a message after the tone.*

You can replace this generic greeting with a personal greeting recorded in your own voice. (If in doubt whether you may/should use personal greetings, ask your system administrator.)

- Select the first radio button under the **Use the following voicemail greeting** setting. If you do not have any saved greetings, you will see << Not set >> beside the button.
- Click the **edit/record** link.
- Prepare the text of your greeting.
- Put on your headset.
- In the window that appears, specify the greeting title (e.g., *My everyday greeting*.)
- Click the **Start recording** button. You will hear a single ringing tone, which indicates the beginning of the recording. The button appearance will change to show the **stop** control.

- Speak your greeting into the microphone. When you are finished, click the **Stop recording** button.



Creating a personal voicemail greeting

Step 3: Check your recorded greeting.

To check your recorded greeting, click the playback button. If you are not satisfied with your greeting, repeat step 1 and step 2 of this process. Otherwise, click **Ok** to confirm. You can review your greeting at any time afterward, change the title, and/or rerecord the greeting itself.

You can prepare up to three different greetings that can be used in various situations (e.g., everyday, travel, vacation). To record another greeting, select an “unused” radio button and repeat the process, starting with step 2.

Step 4: Enable your voicemail.

Once all your greetings are recorded, you can enable your voicemail.

- Use **Send to voicemail after** to specify the no-answer timeout (i.e., the time in seconds after which an incoming call will be forwarded to voicemail when you are logged in and cannot answer it). Note that when you are logged out or if you are logged in with option [No phone](#), incoming calls will be sent to your voicemail immediately regardless of this setting.
- If you have multiple greetings, under the **Use the following voicemail greeting** setting, select the radio button corresponding to the greeting to be used at this time.
- Select the **Enable voicemail for ext...** checkbox. Your voicemail is now activated.

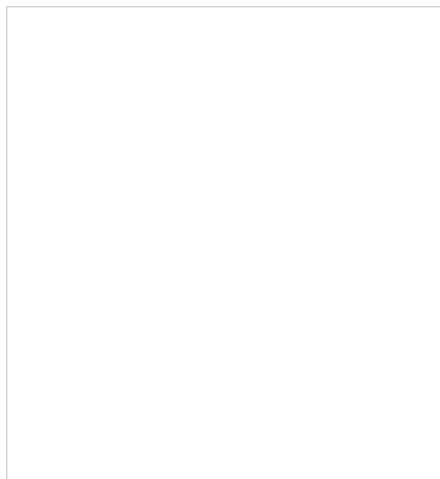
Additional Information

- You can select another personal greeting as your current greeting at any time without disabling and re-enabling your voicemail.
- Instead of recording your voicemail greetings via the Agent Desktop application, you can record them offline and store them as audio files. The process of configuring your greetings is the same, except for step 3 and step 4; instead of recording controls, you click the **Upload** button and select the desired audio file.
- All voicemail settings can be preconfigured for you and changed at any time by your system administrator. This includes the upload of greeting audio files, the selection of the current greeting, setting the no-answer timeout, and activation and deactivation of voicemail.
- [Call forwarding](#) settings take priority over the voicemail settings. A temporary activation of call forwarding will automatically disable the voicemail function; however, your existing voicemail configuration (the no-answer timeout and current greeting) will be preserved and will take effect as soon as call forwarding is deactivated.

Selecting a Phone Device

During login, it is possible to make a selection of the device you will use to handle phone calls. Your system administrator will advise you about the option you should select on your first login. The selected option will be remembered for subsequent login attempts with this browser on your computer.

To select the device, click the current setting of the **Phone device** property in the login dialog box. A list of phone device options appears.



Phone device selection

Phone Device Options

Choose one of the following phone devices to use in the Agent Desktop application.

Softphone with computer headset

This device is a softphone application working as a phone in your computer. A high-quality headset is recommended for this option, such as Plantronics USB DSP series. When you select this option, the extension number assigned to you in configuration will be your phone number for the duration of the login session.

An internal phone

An internal phone is a hardware phone connected directly to the system. This can be a SIP-based phone on your desk, such as Polycom SoundPoint. Enter the desired phone number in the field next to this option.

An external phone

An external phone is any public phone number that can be dialed from the system (e.g., your home or mobile phone when working from home). Enter the desired phone number in the field next to this option.

Depending on your system configuration, once established, your external phone connection may be kept open even when the remote party hangs up. This is normal behavior that is sometimes used to optimize utilization of the established PSTN phone connections. If this option is used in your contact center, you will not need to hang up the phone on your side. Termination of a current active call will be indicated using a special tone. Arrival of the next call will be announced both visually via your Agent Desktop application and via another special tone on your open phone connection. You can accept this call using the **Accept** button on your screen. For more information, see section [How to Answer an Incoming Call](#).

Note that the open line may be automatically disconnected if it stays open for longer than a few minutes without any active calls. If the open line is disconnected automatically or if you release it manually, arrival of the next call will be announced via the regular ringing signal. Your administrator will provide more information about the correct use of the external phone and any configured timeouts.

Default phone

Default phone is a hardware phone permanently assigned to you in the system configuration.

Dial-in and keep line open

Also known as a **nailed connection**, this option allows you to establish a phone connection with the system from any phone upon login and use this established physical connection for handling of all subsequent calls within your login session. If this option is used, the phone number to call for the initial connection will be provided to you by your administrator. Arrival of calls will be announced both visually via your Agent Desktop application and via a special tone on your open phone connection. You can accept these calls using the **Accept** button on your screen. For more information, see section [How to Answer an Incoming Call](#). Termination of active calls will be indicated via another special tone.

Normally, the line will be kept open until you log out of the Agent Desktop application. If your application or browser are closed without a logout while you have a customer call, the system will wait for this call to be released by the remote party before closing the nailed connection. See section [How to Terminate Your Working Session](#) for more information.

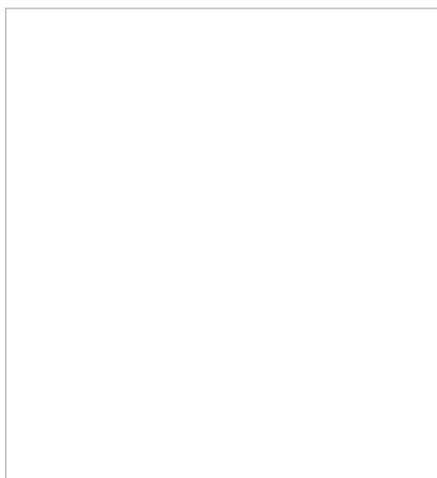
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You can use this option if you plan to work with text-based interactions only (i.e., chat and email).

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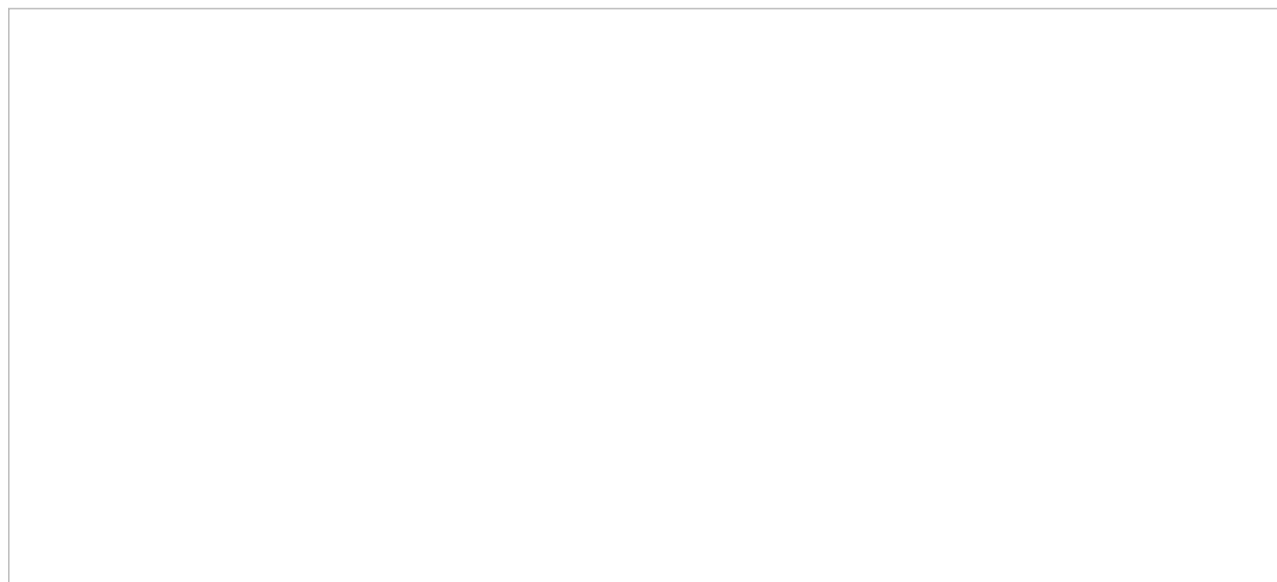
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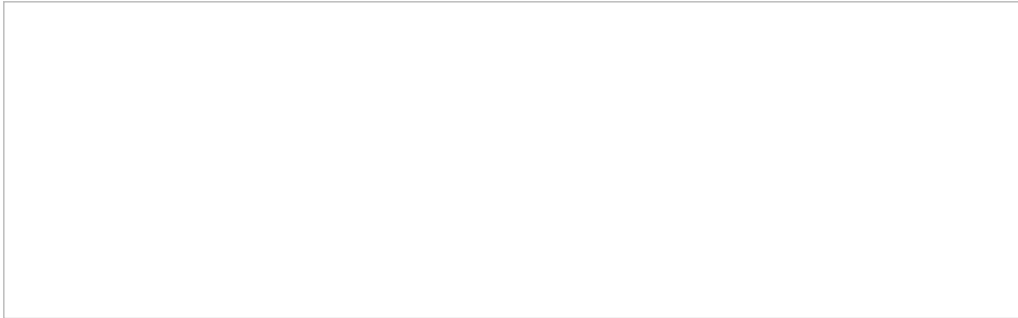
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