

5.2 General Information About Conversations

Bright Pattern Documentation

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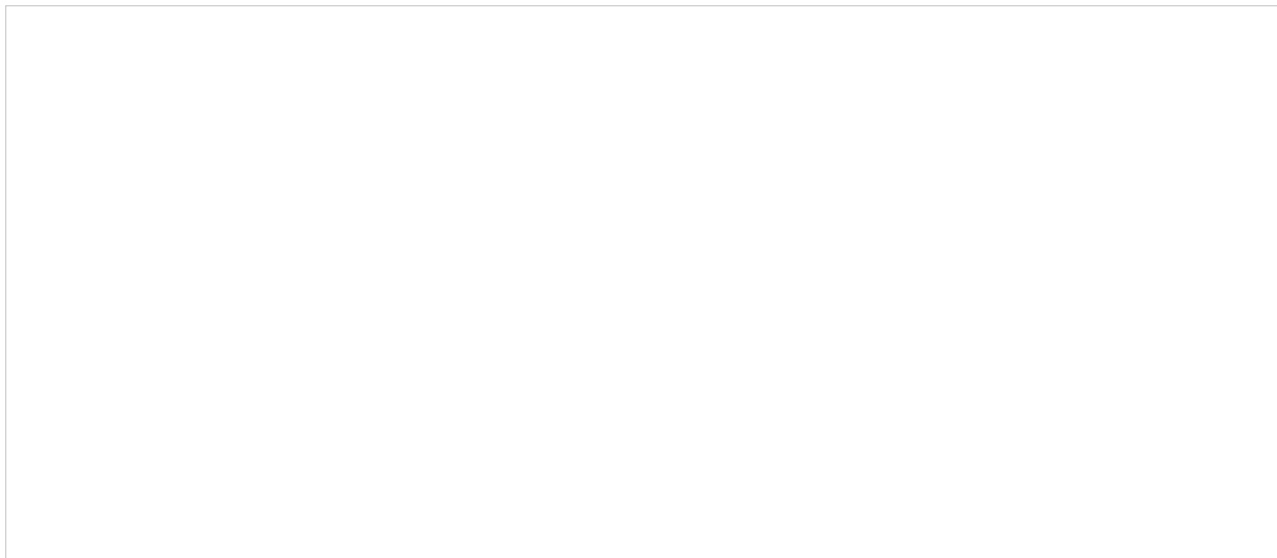
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User Interface Overview

The Agent Desktop application user interface is shown with an active call. Its main elements are shown, and these elements are often referred to in the subsequent sections of this guide.



The elements of Agent Desktop

Menu Elements and Functions (at left side of Agent Desktop)

The elements of the Agent Desktop application screens perform the following functions.

Active Conversations List (ACL)

The *Active Conversations List* shows all your active interactions. For example, if you make a consultation call while holding a service call, this list will show them as two separate items. When you select a particular call or chat from this list, more information about this interaction and the related controls will appear in the *Contact Info Panel*. When you select an email from this list, the email content and the related controls will appear in the *Context Information Area*. For emails, the *Active Conversations List* also provides access to your team email queue, your personal email queue, and case history.



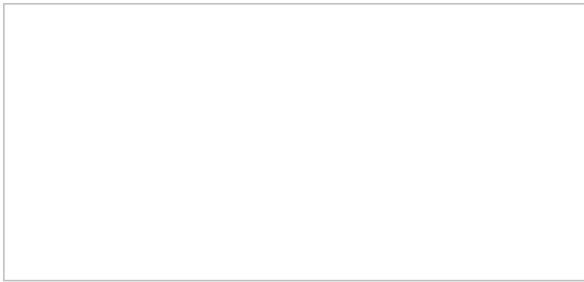
Active Conversations List

Contact Info Panel

The Contact Info Panel provides information about and controls the interaction selected in the *Active Conversations List*. This is the area of the application that you will use most often to handle your active (established) calls and chats.

The Contact Info Panel contains the following:

- *Service Selector* for associating calls with the specific services your contact center provides
- *Number Input Field* for entering phone numbers for outbound and internal calls
- *Directory and Dial Pad* for accessing your company's directory of users and accessing the standard phone dial pad



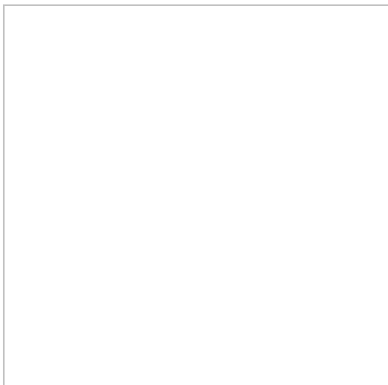
Contact Info Panel

User Status Indicator/Selector



The *User Status Selector and Indicator* displays your current state and, when clicked, a drop-down list of other states to select. You can use the selector to change your state manually.

For more information, see section [Understanding and Handling Your States](#).



Changing your agent state

Timer



The timer indicates the time spent in the current agent state.

Conversations



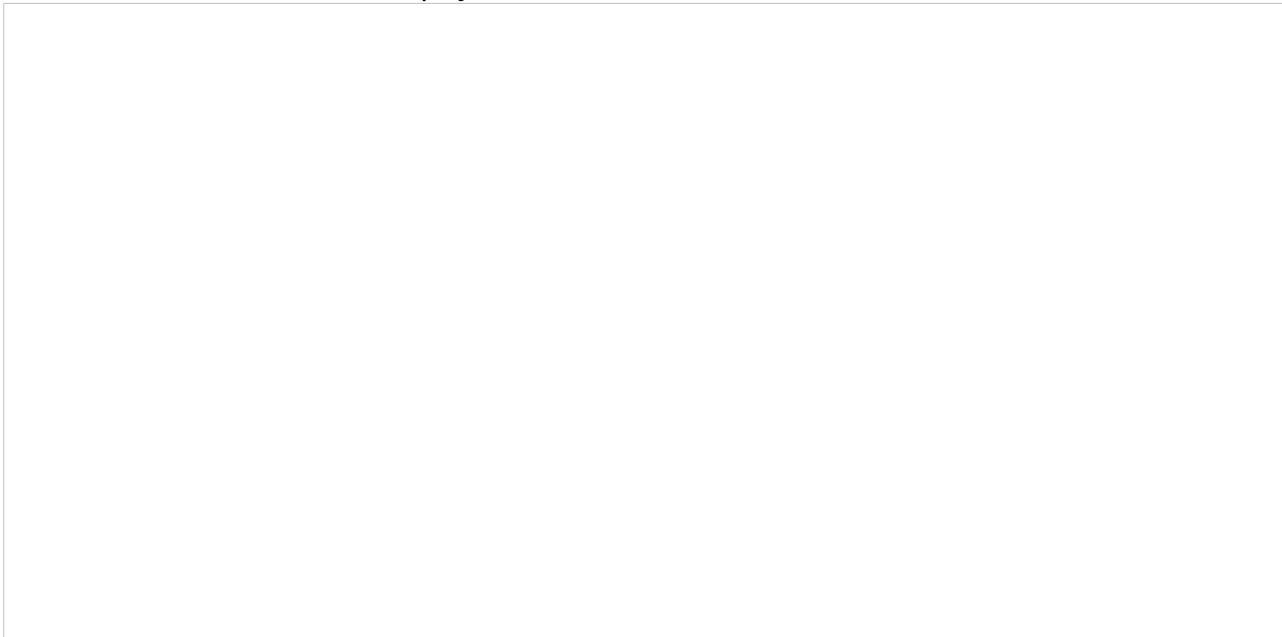
To show or hide the Active Conversations List in the Context Information Area, click the *Conversations* icon. When the Active Conversations List appears, you can access the Directory, Favorites, Recents, and Dial Pad.

The contents of your Context Information Area (at the center of the Agent Desktop) depend on what you are currently doing while logged in to Agent Desktop. For example, in the screenshots shown, the user is viewing the *My Grades* section of Agent Desktop while navigating to *Conversations*.

Notice the difference between the two Agent Desktop views shown.



Click the Conversations icon to display the Active Conversations List



The Active Conversations List appears on the Agent Desktop

Directory and Dial Pad

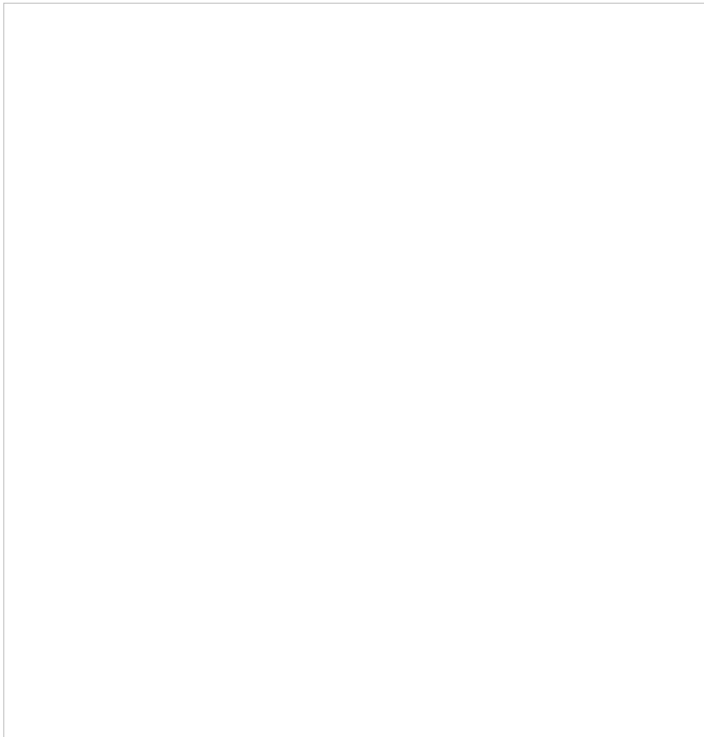


The *Directory and Dial Pad* provides quick access to the following:

- *Directory* for browsing users in your contact center
- *Favorites* for creating your personal list of frequently called numbers
- *Recent Contacts* for viewing your previous call attempts
- *Dial Pad* for accessing the standard phone dial pad
- Numeric entry field for quickly initiating calls and conference calls

The Directory stores the names, numbers, profile photos, and user status (logged in or not logged in) of users in your contact center. Users are organized according to teams, and you can expand or collapse the full list of users within each team.

Mousing over a user's name causes the phone icon and the chat icon to appear. Clicking on the phone icon will initiate a call to that user. Likewise, clicking on the chat icon will initiate a chat to that user.



Making an internal call

During an active chat, clicking on the *Directory and Dial Pad* icon will cause the chat conversation to appear in the Contact Info Panel. Clicking on the icon again will switch your view back to the Directory and Dial Pad.

Text Input Field

The *Text Input Field* allows you to enter messages for real-time text-based interactions, such as service chat, SMS, and internal chat.

Type your message in the Text Input Field

Selected Conversation's Documents



If a conversation or case has been selected on the Agent Desktop, the email messages, chat messages, or other documents associated with the conversation will be displayed in the Context Information Area.

Calendar



Click the *Calendar* icon to view and edit the user's calendar in the Context Information Area. For more information, see section [How to Open the Calendar](#).

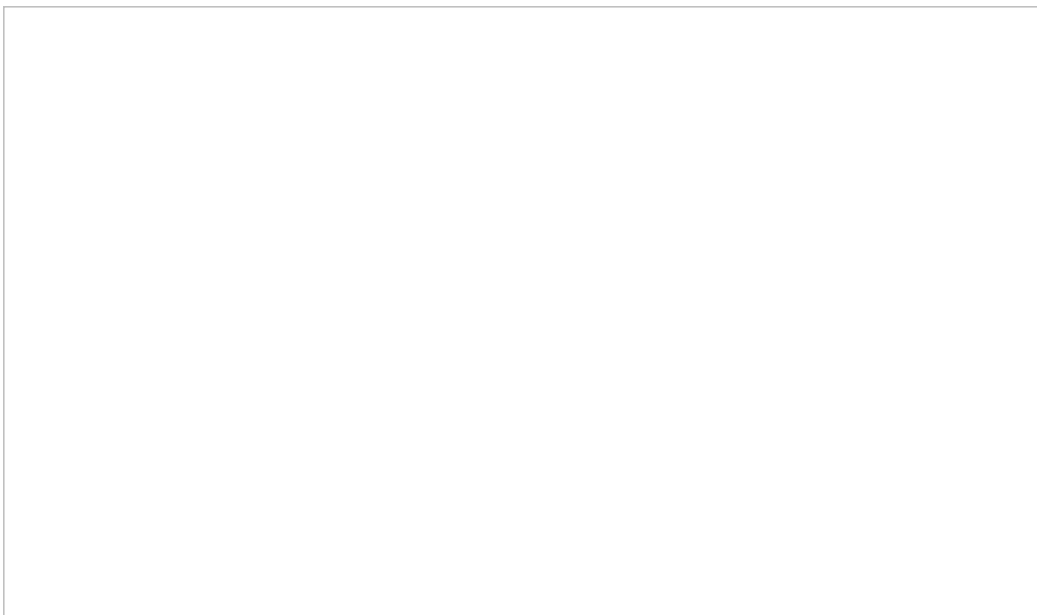


The Agent Desktop Calendar

My Cases



Click *My Cases* to work with email cases from your Team Queue, Personal Queue, or Follow-ups in the Context Information Area. For more information, see section [General Information About Handling Email](#).

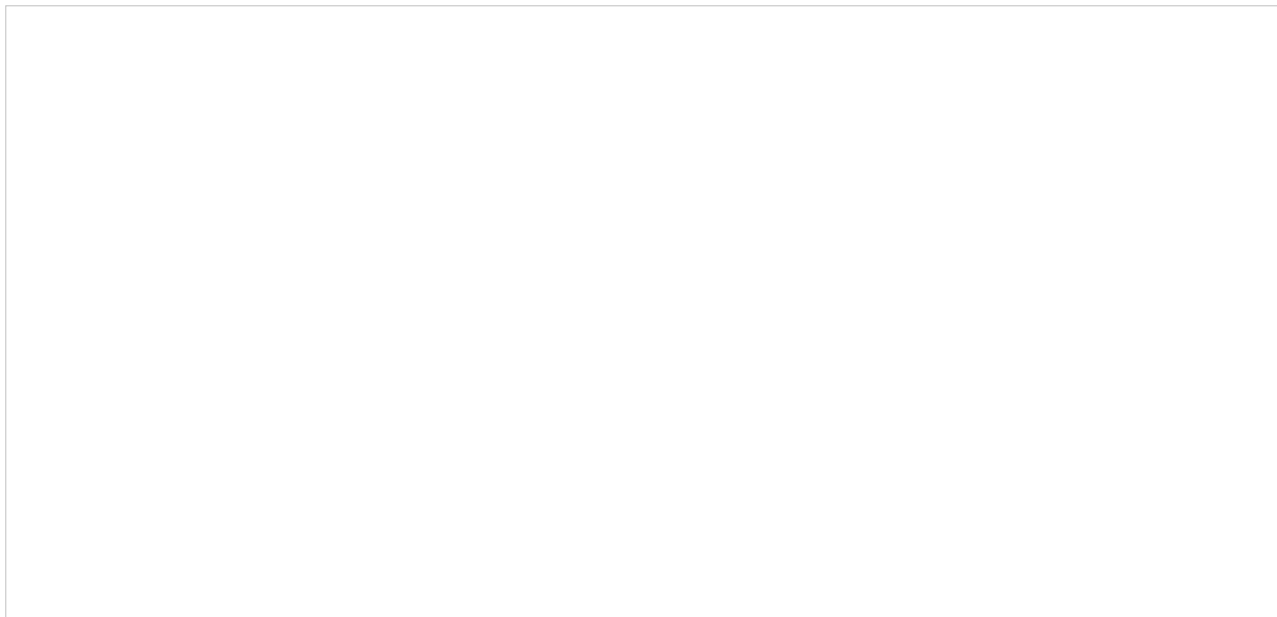


My Cases contains your email cases

Contacts



Click *Contacts* to search and view contact information for the people in your directory, cases, and recent contacts list.



My Cases

Supervision



The Supervision icon is shown only to supervisors logged in to Agent Desktop.

Chat Center



Click *Chat Center* to initiate chats with chat groups or personal chats with other users in your organization.

My Grades



Click *My Grades* to view metrics related to your and your team's performance in the Context Information Area. For a more detailed explanation, see [General Information About My Grades](#).



My Grades

Controls Area (at top right of Agent Desktop)

This area on the user interface provides access to help materials, application settings, and the log out function.

Contact Search



Click the *Contact Search* icon to display a text field for searching your contacts.

Contact Search field

Wallboard



Clicking the *Wallboard* icon will direct you to the Wallboard Builder application in a new browser tab or window. Wallboards display statistics and informational widgets about your current performance and/or performance of your team. If you have the privilege to edit wallboards, you can customize them from the Wallboard Builder application.

Help



Click the *Help* icon to access help materials, such as links to documentation, HR, and procedures.

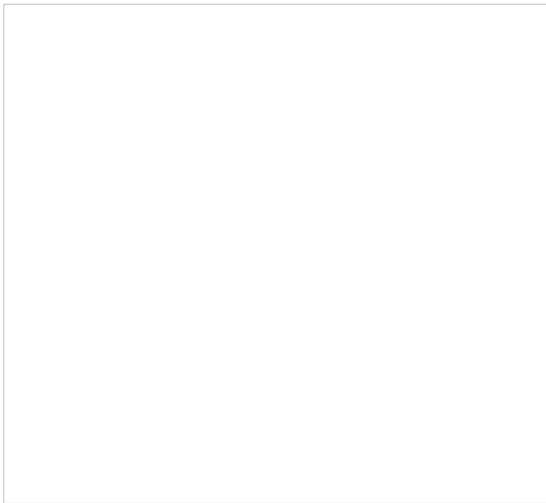


Agent Desktop Help

Settings



If you have not uploaded a user profile photo, Agent Desktop Settings is shown as a cog icon. If you have already uploaded a user profile photo, that same image is shown in place of the cog icon. Click either icon to update your settings.

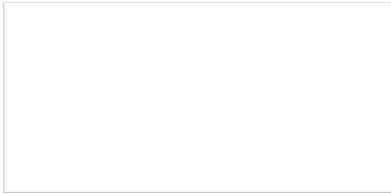


Settings

Log out



Click *Log out* to log out of your working session.



Logging out of Agent Desktop

Context Information Area (at center of screen)

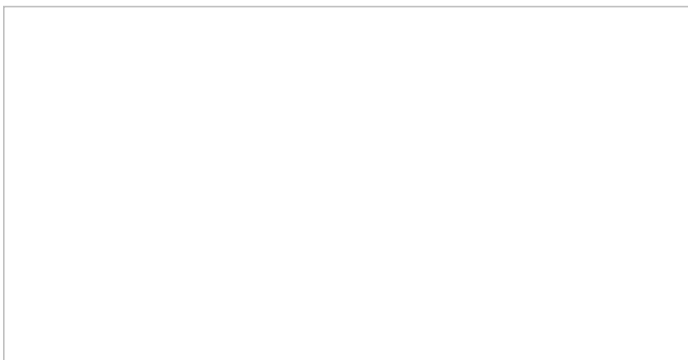
The *Context Information Area* displays web pages and forms that can be used to provide the information you need in order to serve your customers (e.g., customer profile) and enter new information based on your conversation with the customer (e.g., a purchase order). The appearance of content in this area is often synchronized with the delivery of a customer interaction to your desktop (e.g., during call ringing). For more information, see section [Understanding Screen-pop](#).

The Context Information Area is also used for the following:

- Your grades and wallboards
- Standard email processing functions such as message reviewing, reply editing, and case search
- Knowledge Base
- Pop-out chat panels
- The display of data received from customers during chat sessions
- Teams and services dashboards
- Calendar display

How to Answer an Incoming Call

When a call is delivered to your desktop, you will hear a ringing tone in your headset and you will see a call alert pop-up window indicating an incoming call.



Call alert pop-up window

Your state will change from [Ready](#) to [Busy](#), and the ringing icon will indicate the ringing phase of the call.

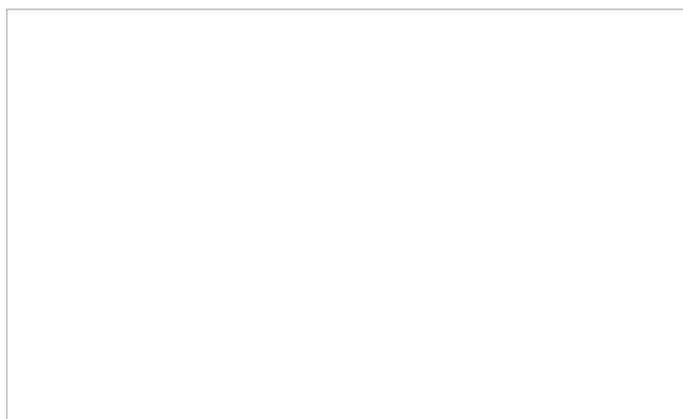
Call Alert Window

The call alert window will display relevant data that is dependent on the type of call.

- If the incoming call is a service call, the call alert window will display the service name to which the call was made.
- If the incoming call is an internal call from another agent or a supervisor, the call alert window will display the name and extension number of the calling party.

There are two buttons: Accept and Reject.

- To answer the call, click the **Accept** button.
- The *Active Communications List* will display the inbound call icon indicating that the call is now established and the timer for this call will start.



Active Communications List shows the current call

For service calls, depending on your contact center configuration, you may hear an announcement of the service number to which the call was made. The calling party will not hear this announcement.

You can now greet the calling party and begin a conversation.

Note: If you do not answer a ringing service call within a predefined amount of time, you will be automatically switched to the *Not Ready* state. You will receive a clear indication for the reason of being in the *Not Ready* state and will need to [make yourself manually Ready](#) when you are ready to receive another call. Unanswered service calls will appear in your performance and activity reports.

How to Accept a Chat Request

When logged in to the Agent Desktop application and in the *Ready* state, you are available to receive interactions such as chats at any time. Accepting a chat request is simple.

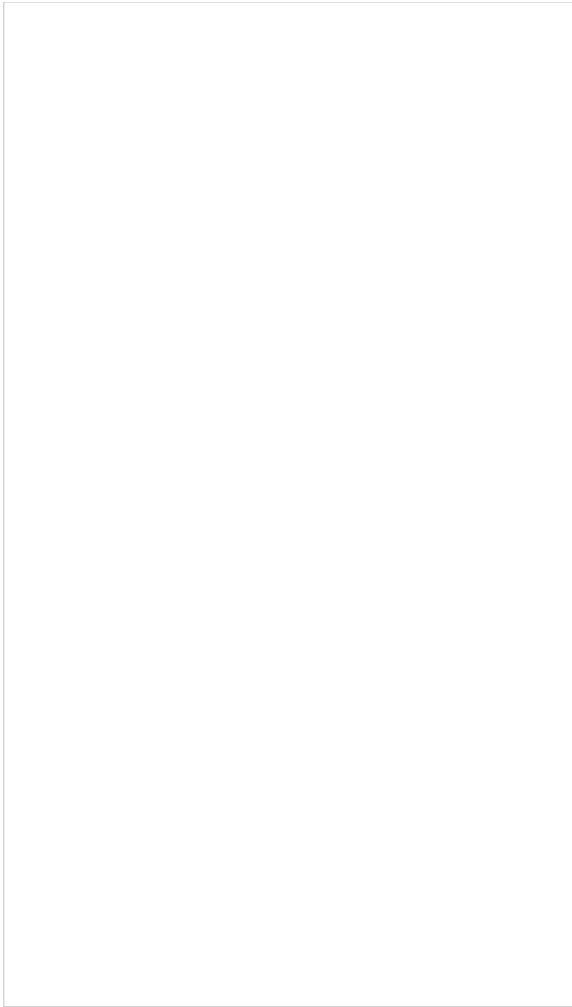
When a service chat interaction is delivered to your desktop, you will hear a tone and see an alert pop-up window titled **Web Chat** indicating a chat request. Your state will change from [Ready](#) to [Busy](#). The alert pop-up window will display the name of the service requested by the customer as well as the customer's name if it was provided in the chat request form.



Web chat alert

To accept the chat request, follow these steps:

1. Click the **Accept** button.
2. The *Active Communications List* will display the chat icon , which indicates that the chat session is now established and the timer for this session will start.
3. The available customer information will be displayed in the *Contact Info Panel*.
4. You can now [begin a chat session](#) with the customer.



A service chat session

If you do not accept a chat request within a predefined amount of time, you will be automatically switched to the *Not Ready* state. You will need to [make yourself manually Ready](#) when you are ready to receive another chat.

Note: Unaccepted chat requests will appear in your performance and activity reports.

How to Send SMS Messages

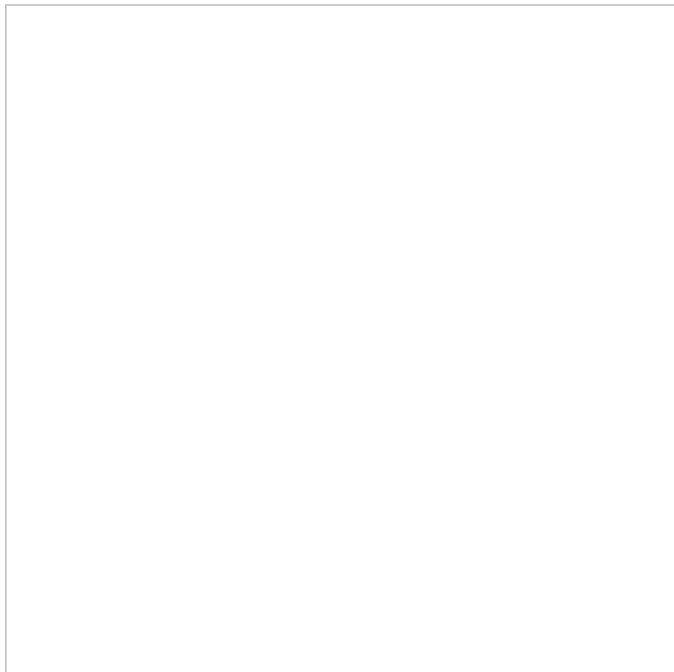
Depending on the service configuration and your personal permissions, you may be able to send text messages via the Short Message Service (SMS) to customers who use mobile phones. This capability can be useful when you need to give your customers information that is better communicated as text (e.g., a confirmation number, mailing address, or web link).

Text messages can be sent at any time: when you are on the phone with the mobile customer, while performing the related after-call work, and after you have finished processing of the call. If the customer replies to your text, the system will deliver this message to you, associate with your original message, and present it to you in the form of a chat session.

Texting While in *Busy* or *After Call Work* State

To send an SMS message to a customer while handling the customer's service call (i.e., while you are in the [Busy](#) or [After Call Work](#) state), follow these steps:

1. Make sure the service associated with this call supports SMS communications; if this is the case, the **Send SMS** icon will be displayed next to the customer's number in the *Contact Info Panel*.
2. If necessary, confirm with the customer that the customer's phone can receive SMS messages.
3. Click the **Send SMS** icon.
4. Type the desired message in the **Text Input Field**.
5. You can use the **Pre-defined text message** icon to enter a message from your predefined text message set. For more information about predefined messages, see section [How to Create and Edit Chat Responses](#). Note that there is a limit for the number of characters in one SMS message. The limit (160 characters) and the current number of characters already entered are displayed below the text input field.
6. When the message is ready, press **Enter** or click **Send SMS** icon below . The message will be sent to the customer and will appear with a timestamp in the transcript area above the **Text Input Field**. When the system confirms message transmission with the carrier, the status of the message will be displayed as **Delivered**.



SMS text input field

If the customer replies to your message, the customer's message will appear in the transcript area highlighted in a different color.

You can continue exchanging SMS messages in this manner for as long as necessary. All such messages will be presented to you via transcript as part of the same conversation. Note that such exchange can extend beyond the call and even beyond your current login session.

When you know that the message exchange is over, click the **End Chat** button. If the customer continues to send SMS messages to you after you end the session, those messages will be ignored.

Texting While in *Ready* or *Not Ready* State

To send an SMS message to a customer while in [Ready](#) or [Not Ready](#) state follow these steps:

1. Select the service associated with this SMS message. See section [How to Make an Outbound Call](#) for more information about selecting services.
2. If the selected service is configured to support SMS messages, the **Send SMS** button will be displayed next to the **Number Input Field**, adjacent to the **Call** button.
3. In the **Number Input Field**, enter the customer's phone number. Make sure this is a mobile number.
4. Click the **Send SMS** button. The **Contact Info Panel** will display an active chat session with the entered number and the **Text Input Field** at the bottom.
5. Follow steps 3 to 6 of the process of sending an SMS message to a customer while handling his service call (see section "Texting While in *Busy* or *After Call Work* State").

Note: Depending on your contact center configuration, your customers may also be able to initiate a contact with you via SMS. For you, as an agent, such SMS messages will be presented in the same way as if they were regular incoming service chat requests. For more information, see section [Handling Service Chats](#).

General Information About Mobile Interactions

Customers have increasingly been able to contact businesses via applications that they download to their smartphones. Such applications were originally designed for self-service and web-form inquiries. More recently, however, web and mobile applications have begun to support live interactions, including chat, voice, and video calling. The picture below shows an example of a customer communicating with an insurance agent via a mobile chat application.

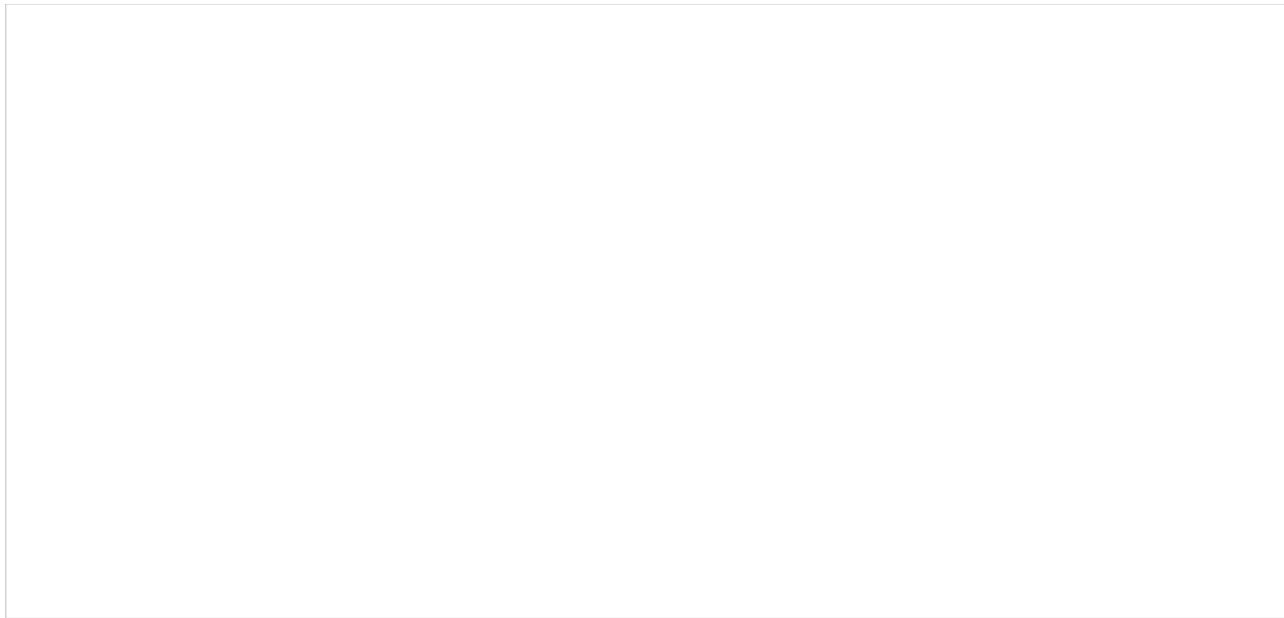


Mobile chat application example

Thus, depending on your service configuration, you may be expected to handle interactions that customers initiate via such smartphone applications. Generally speaking, you handle mobile voice and chat interactions in the same way that you handle regular [service calls](#) and [service chats](#). A few differences that you may need to be aware of while handling mobile interactions are discussed in the sections that follow.

General Information About Handling My Cases (Email)

In addition to calls and chats, you may be assigned to process customer requests made via email. Depending on your contact center practices, customer emails can either be delivered directly to your desktop (i.e., the *Push* method) or appear in the team queue from which you will be expected to retrieve them manually (i.e., the *Pull* method). Emails can also be assigned to you by a supervisor. In this case, they will appear in your personal queue from which you will also be expected to retrieve them manually. Finally, emails can be transferred to you by other agents. Once you have accepted an incoming email or retrieved one from a queue, all subsequent steps of its processing will be the same.



Agent Desktop with My Queue and Team Queue in Contact Info Panel

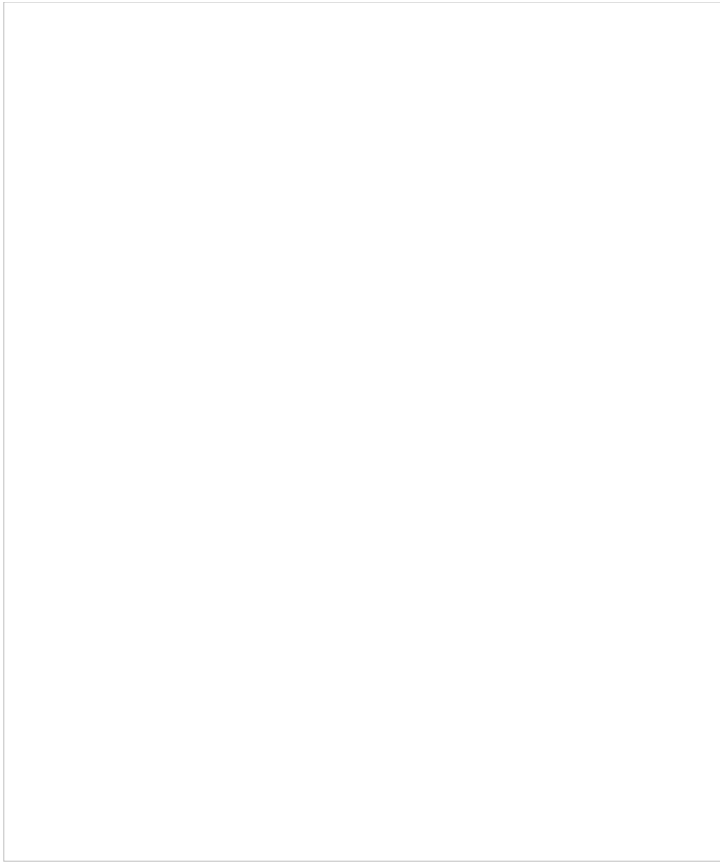
In the simplest email processing scenario, a single reply to the customer's inquiry will be sufficient to finish the interaction. More complex scenarios may involve some follow-up messages from your contact center to the customer and/or additional communications from the customer. To support these scenarios, each email is associated with a [case](#) and a [thread](#). See the [Understanding Email Cases and Threads](#) section for more information about these entities.

Depending on your contact center configuration, you may be expected to handle multiple emails simultaneously. Your system administrator will advise you about the maximum number of emails that you may have active on your desktop at any given time. Regardless of how many active emails you have, only one of them will be in focus at any given moment. The in-focus email is the one that is currently selected in the *Active Communications List*. The email working area will be entirely dedicated to the in-focus email and all of its controls will take effect for that email only. You can place another email in focus by selecting it from the *Active Communications List*. You can switch between your various active emails in this manner at any time.

Activities

The Activities tab stores the selected contact's records for all types of conversations (i.e., voice calls, emails, chats, SMS/text messages, Messenger interactions, etc.) that have been handled by your contact center. Activities are searchable, enabling you to access specific information quickly, even while handling an active interaction. Built-in contacts show records of all interactions and cases, if any, for the selected contact.

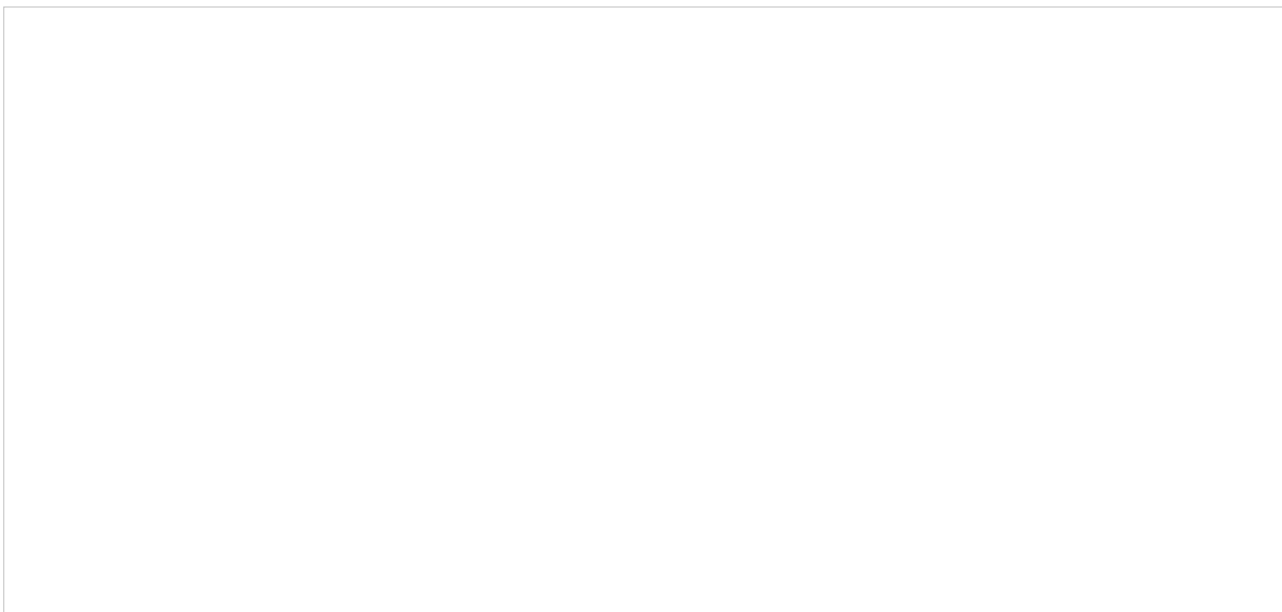
The Activities tab is accessed from contact details.



Activities tab is accessible from contact details

Using Activities

The Activity tab displays all activity history for a person. This includes voice calls, call transcripts, speech-to-text transcripts, chat interactions, chat transcripts, email messages, Messenger interactions, Messenger transcripts, SMS/text messages, notes from agents, and so forth.



Activities are shown for the selected contact

On the **left** side of the screen, you will see the records of all activities and interactions involving this contact in order by date, with the newest at the top of the list.

When you select a specific activity, the **right** side of the screen will display additional information. Depending on the interaction type and your privileges, you may also be able to review the associated interaction content, such as call recording or chat transcript.