

## 5.2 General Information About Outbound Campaigns

### Bright Pattern Documentation

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# How to Interpret Your Current State Information

The agent state is the indication of your current availability to handle service calls. This information is used by the system to decide whether a new service call can be delivered to you. The information about the time you spend in each state also appears in reports about your performance.

The Agent Desktop application uses icons to represent agent states. Your current state is shown in the upper left-hand corner of Agent Desktop. These icons, the states they represent, and descriptions of those states are described as follows.

**Note:** Information in the main text of this section is valid if your system is configured to let you handle one customer interaction at a time. This configuration is most typical when you handle calls only. If you process interactions of other types (e.g., chats or emails), then, depending on your contact center practices, you may be expected to handle multiple interactions simultaneously. The differences in interpretation of your states in this case are briefly explained in the notes following a state description. For a more detailed explanation, see sections [Handling Multiple Chat Sessions](#) and [General Information About Handling Email](#).

## Agent States

### Ready



You are available to take a service call. In most cases, you make yourself *Ready* manually. See [How to Make Yourself Ready](#) for more information.

Depending on your contact center practices, the *Ready* state may also be applied automatically under some of the following conditions:

- Upon login
- As soon as you finish a previous service call
- When the time allocated for after-call work associated with the previous call expires
- When the rest time associated with the previous call expires

You may also be forced into the *Ready* state by your supervisor.

**Note:** If you are expected to handle multiple interactions simultaneously, the *Ready* state will only be applied when you do not have any active interactions on your desktop. However, in this case you may receive new interactions in states other than *Ready*.

### Ringling



You are unavailable to take service calls because one service call is already being delivered to you. The ringing icon is briefly displayed while your phone is ringing.

### Busy



You are unavailable to take new service calls because you are already handling a service call. This state is displayed from the moment the call is connected and until it is released. For outbound calls, it also includes the call dialing phase. When your service call is released, depending on your contact center practices and the services that you provide, you will be switched automatically to either the *After Call Work* state, the *Not Ready* state, or the *Ready* state.

**Note:** Even if you are expected to handle multiple interactions simultaneously, your state will be displayed as *Busy* as long as you have at least one active interaction of any media type. However, your actual availability will depend on the number of interactions you are currently handling versus the maximum number of interactions you are expected to be able to handle simultaneously. Therefore, you may receive new interactions when you are in the *Busy* state.

## After Call Work



You are unavailable to take new service calls because you are processing information related to the call that you previously handled. This state may or may not be used depending on your contact center practices and the services that you provide. If it is used, you will be switched to this state automatically as soon as the call is released by either the customer or yourself. You will remain in this state until you manually make yourself *Ready* or *Not Ready* to take another call. Note that your *After Call Work* state may also end automatically if the time allocated for the after-call work exceeds the limit set by your administrator.

**Note:** If you are expected to handle multiple interactions simultaneously, you may receive new interactions when you are in the *After Call Work* state. You will be switched to this state only when the last live interaction on your desktop is finished. (Otherwise, you will continue to be in the *Busy* state.)

## Not Ready



You are unavailable to take service calls because you are temporarily away from your desktop or busy doing some work that is not directly related to handling of service calls. Under normal circumstances, you make yourself *Not Ready* manually. Your system may also be configured to let you indicate a specific reason for being *Not Ready*. For more information, see [How to Make Yourself Not Ready](#) and the following *Not Ready* agent states: *Lunch*, *Away From Desk*, and *Break*. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.

Depending on your contact center practices, the *Not Ready* state may also be applied automatically under some of the following conditions:

- Upon login
- As a short rest time after finishing processing of a service call
- Upon rejection of a service call
- If you do not answer a ringing service call within a reasonable time
- When your Agent Desktop loses connection to the system

You may also be forced into the *Not Ready* state by your supervisor.

**Note:** You will not receive any interactions while you are in this state regardless of how many interactions you are expected to handle simultaneously.

### **Lunch**



You are unavailable to take service calls because you are on your lunch break. Under normal circumstances, you manually set the agent state to *Lunch* or some other Not Ready reason. See [How to Make Yourself Not Ready](#) for more information. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.

### **Away From Desk**



You are unavailable to take service calls because you are temporarily away from your desktop. Under normal circumstances, you manually set the agent state to *Away From Desk* or some other Not Ready reason. See [How to Make Yourself Not Ready](#) for more information. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.

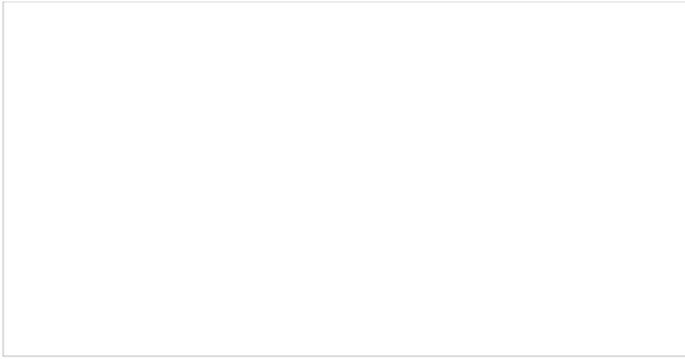
### **Break**



You are unavailable to take service calls because you are taking a break. Under normal circumstances, you manually set the agent state to *Break* or some other Not Ready reason. See [How to Make Yourself Not Ready](#) for more information. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.

## **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.

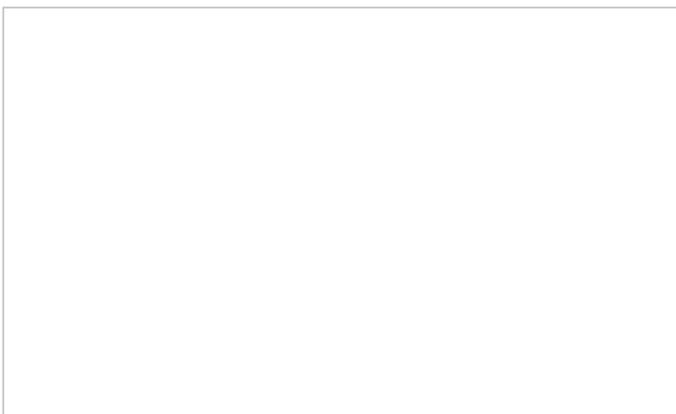
## Call Alert Window

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 Review a Calling Record

Calling records, also known as campaign records, include detailed information about a call interaction. This information includes customer name, phone number(s), customer history, previous attempts to contact the customer, and so forth. Campaign records are accessible to agents on the Agent Desktop application. You can access calling records in the following way.

### Step 1: Preview campaign records.

- When a campaign record is delivered to your desktop, you will see a pop-up window titled **Preview**, which indicates a preview request. A preview allows you to review campaign records before attempting to contact a customer. The pop-up window will display the campaign name and the customer name.
- Click **Accept** to review the record. (Note that depending on your contact center practices, calling records delivered to your desktop may be automatically accepted for you.)
- Notice that your state will change from [Ready](#) to [Busy](#).

### Step 2: Review available information.

- View the customer name and phone numbers from the preview record in the *Contact Info Panel*.
- Click the **History** tab to see if there have been any previous attempts to contact this customer within the given campaign.
- Notice that you will continue to be in the *Busy* state while reviewing the record. You can [make yourself Not Ready](#) at any time during the review of the given record if you want to make yourself unavailable for any subsequent review requests.

### Step 3: Either complete the record or call the customer.

After reviewing the record, you can take one of the following approaches.

#### If the record appears to have some incorrect or missing information:

- Select the disposition corresponding to this situation.
- Click the **Complete** button to finish processing of this record within the campaign. (The default disposition is called *Bad Record*, but it may be redefined in your contact center. If in doubt, consult your system administrator.)
- Your state will change from *Busy* to *Ready*, and you are likely to receive another preview request shortly.

#### If the information in the record appears to be valid, but you cannot handle it for any reason:

- Click the **Skip** button. The system will remove the record from your desktop, and will attempt to distribute it later.
- Unless you make yourself *Not Ready* before clicking **Skip**, your state will change from *Busy* to *Ready*, and you are likely to receive another preview request soon. \* Note that each instance of skipping a record will be accounted for in the contact center reports.

**If the information in the record appears to be valid and you are ready to call this customer:**

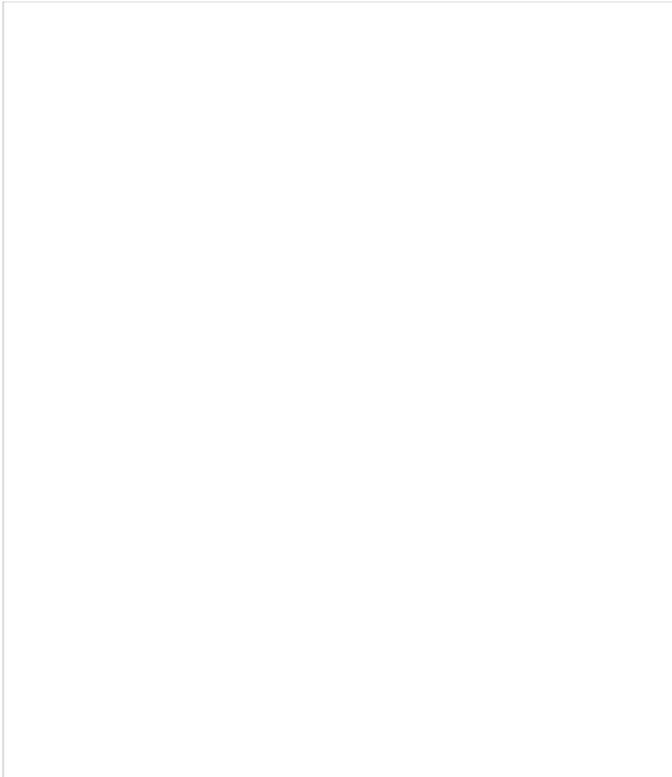
- Click the phone number in the **Addresses** area.
- If there are multiple numbers, the number recommended for dialing at this time according to the campaign configuration will be marked with a green circle. (Note that depending on your contact center practices, you may be given a certain amount of time to review the record before the system will dial its preferred number automatically.)
- A call attempt to the selected number will be initiated, and the subsequent call handling will be no different from any regular outbound call, except that you would normally be required to set a call disposition according to the call result. For more information, see sections [How to Enter Dispositions and Notes](#) and [How to Reschedule a Call Attempt](#).

## Dispositions and Notes

Dispositions are custom interaction results defined by your contact center management. When handling a service interaction, you may be required to select one of the [dispositions](#) that define the outcome of the interaction. If dispositions are defined for the services that you provide, the [Contact Info Panel](#) of your Agent Desktop will display the *Disposition Selector* for every associated service interaction.

If you are required to set dispositions, you will receive detailed instructions for their use from your system administrator. Learn more about [dispositions](#) and how they are managed in the *Contact Center Administrator Guide*.

In addition to dispositions, you can also enter free-form text notes to provide more information about the outcome of the interaction.

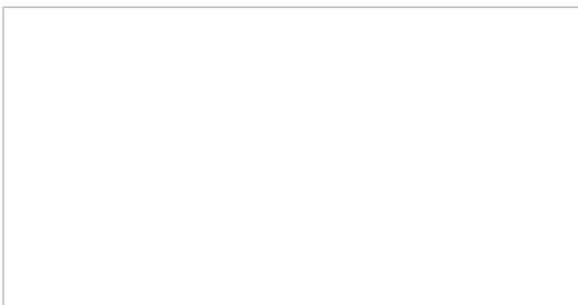


Disposition selector

## How to Enter Dispositions and Notes

To enter a disposition for an interaction and/or related notes, follow these steps:

1. At any time during the interaction with the customer or while in the [After Call Work](#) state, click the *Disposition selector*.
2. From the drop-down menu, select the disposition that corresponds to the result of the interaction. Some dispositions specific to outbound campaigns may require additional parameters, such as scheduling of another call attempt. If such parameters are required, they will be displayed in the *Contact Info Panel*.
3. If necessary, enter free-form notes in the text field.
4. Continue to process the interaction normally. For more information about finishing interactions, see [How to Release a Call](#) and [How to Wrap Up After-call Work](#).



Selected disposition and free-form notes

**Note:** If you use a custom form in the *Context Information Area* for processing data related to a specific call, both the *Disposition Selector* and the *Notes* field may appear in that form instead of the *Contact Info Panel*.

## Other Uses for Dispositions

If configured for your contact center, a disposition can be used to trigger a *workflow*, an automated series of events that are initiated when an interaction is completed.

Workflows automate what happens after the conversation is done and will handle any necessary follow-ups, depending on the interaction's disposition type. Such follow-up actions include setting context variables, sending an email, sending a text message, scheduling an event, clearing a scheduled event, and making a request. Workflows help to reduce your workload by following up with customers and gathering data in a consistent way.

For example, setting a particular disposition for an interaction could trigger the following series of events to happen:

1. Send a survey to the customer
2. Wait a specified amount of time (e.g., 30 minutes, 1 day, 1 week, etc.)
3. Send a follow-up email to the customer.

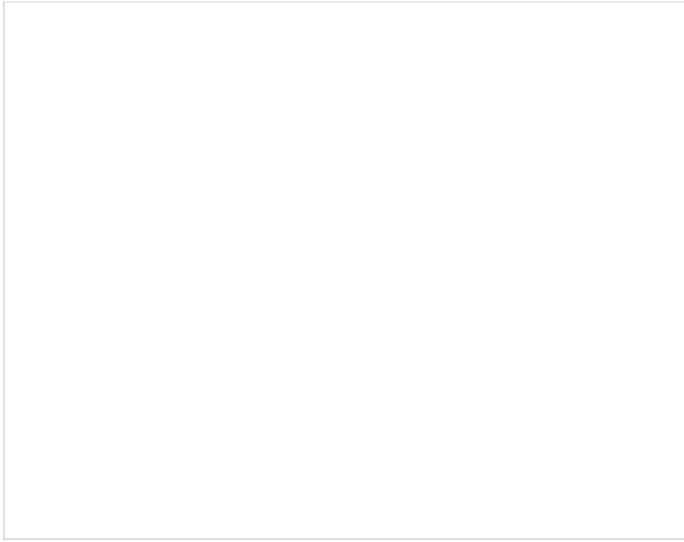
## Using Dispositions to Request That Content Be Erased

Starting with Bright Pattern Contact Center version 5.2, you can use a disposition to request that content from a specific interaction be erased. This capability was added to meet PCI DSS 3.2 and GDPR requirements, which specify that sensitive data (e.g., credit card information) may not be stored in your contact center, even if it is encrypted. As such, Bright Pattern allows for the manual deleting of data that is stored in voice recordings, voice recording transcripts, chat transcripts, email messages, screen recordings, and so forth.

You can request that such data be erased, but only your system administrator can erase it.

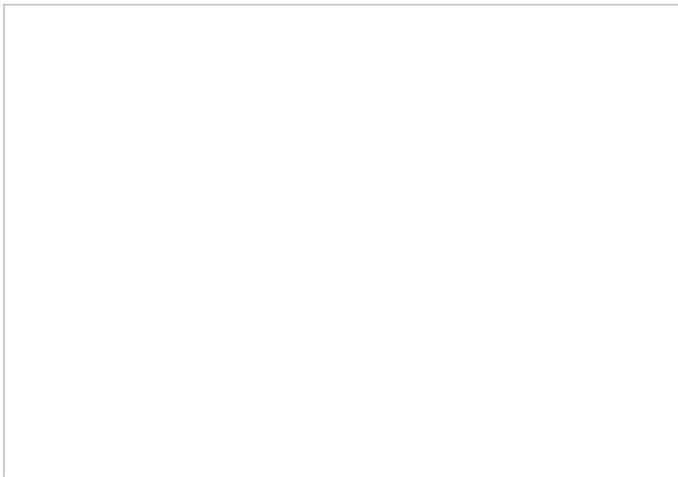
### What to Do

1. If such a disposition is enabled for your contact center, you can disposition an interaction with a request to erase content, provided that you give a reason. Note that the name of the disposition is determined by your contact center. If you do not know which disposition to select, contact your supervisor or system administrator.



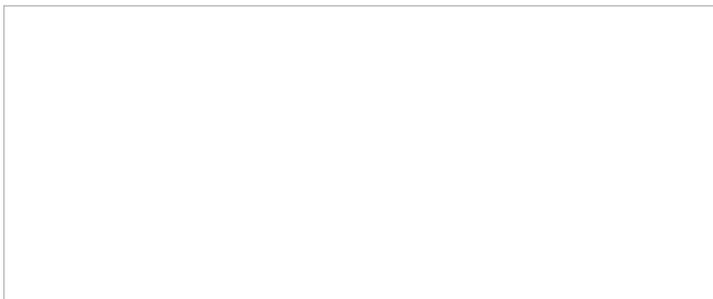
Disposition "Erase content" selected

2. In the *Notes* field, provide the reason for the request and enter additional details about the interaction. Then complete the interaction.



Use Notes to provide a reason for erasing content

3. The disposition will initiate a workflow that sends your system administrator an internal message with the request. The unique identifier tells the administrator which interaction is affected, and he or she can review the interaction and the request.



Example message delivered to the system administrator

# How to Use Prerecorded Messages

Depending on your contact center practices and the services that you provide, you may be required to repeat the same information during each call (e.g., a standard company greeting or a policy advisory). Such standard messages can be prerecorded and then played back to the customer during a call.

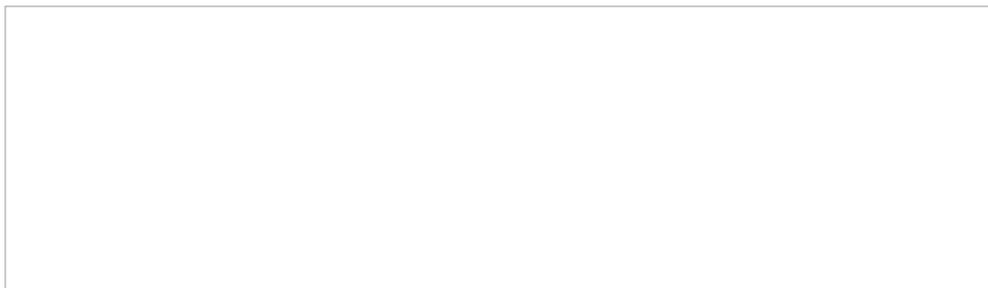
Some prerecorded messages can be preconfigured by your system administrator with respect to various services provided by your contact center. In this case, when you handle a call associated with a specific service, messages preconfigured for this service will be made available for selection via *Contact Info Panel*.

## Creating Messages

You can define your personal prerecorded messages and record them using your own voice.

To create a personal message, follow these steps:

1. Prepare the text of your message.
2. Put on your headset.
3. Click **Settings** . Note that if you have uploaded a user profile photo, your photo is used in place of the Settings icon.
4. Select **Pre-recorded Messages**.
5. In the dialog window that appears, click the “+” button.
6. In the window that appears, specify the message **Title** (e.g., *My regular voicemail message*.)
7. 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 .
8. Speak your message into the microphone. When you are finished, click the **Stop recording** button .
9. Check your recorded message by clicking the **Play file** button . If you are not satisfied with the way the message sounds, repeat step 6 and step 7 of this process.
10. Click **Ok** to confirm.



Creating a personal prerecorded message

## Standard Greetings

You can designate one of your prerecorded messages as a standard greeting that will be played to customers automatically as soon as you answer their calls (e.g., *Welcome to ... My name is ... How can help you today?*). You should only use such an automatic greeting if you actually use the same way of greeting your customers on all service calls that you handle.

To create such a greeting, follow these steps:

1. When reviewing your message, select the **play automatically on all service calls** checkbox.
2. When you click **Ok** to confirm, the message will appear marked as **(default)** in the message list.

## Reviewing and Editing Messages

You can review your messages, change their titles, and re-record the content whenever you like.

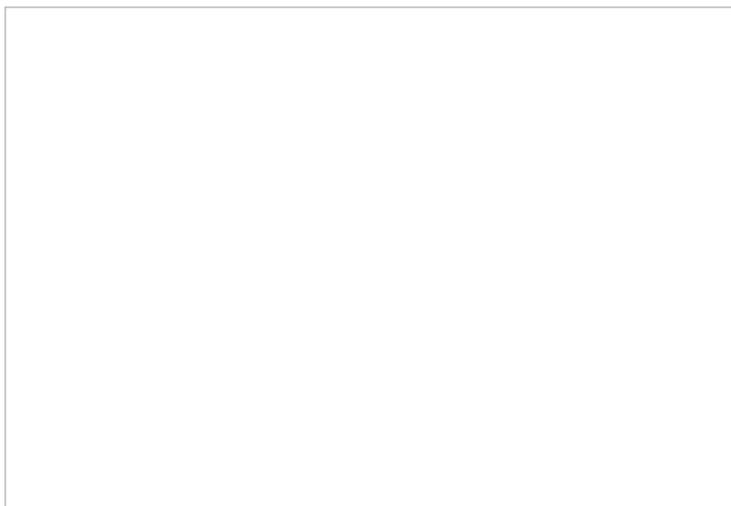
To review and/or edit an existing prerecorded message, follow these steps:

1. Navigate to *Settings > Pre-recorded Messages*
2. Select the message you wish to edit
3. Click the **edit** button .

**Note:** Instead of recording your personal messages 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 instead of recording controls, you click the **Upload** button and select the desired audio file.

## Playing Messages During a Call

If there are any prerecorded messages defined either at the service level or for your personal use, a message selector will appear in the *Contact Info Panel* when you have a connected call.



Pre-recorded message playback

To play a message to the other party on the call, follow these steps:

1. Select the desired message from the drop-down menu. If you do not see the desired message in the drop-down menu, click **more...** A separate dialog window will appear listing all available messages in two groups: *Canned Prompts from Service* and *Personal Pre-recorded Messages*.
2. Click the **Play file** button .
3. Playback of the selected message will begin. You will be able to hear the message being played. You can continue the conversation with the other party normally after the message playback ends.
4. If you wish to stop the message before the end of the playback, click the **Stop** button. You can continue the conversation with the other party normally after stopping the message.

## Using a Pre-recorded Message As a Voicemail

You can use the message playback function to leave a prerecorded message on the called party's answering machine. In this case, you can disconnect yourself from the call immediately after activating the message playback.

To leave a prerecorded message on the other party's answering machine, follow these steps:

1. Select the desired message as described, and wait for the invitation to leave a message.
2. Click the **Play file** button . Playback of the selected message will begin.
3. Click **End Call** at any time to disconnect yourself from the call.

Playback of the prerecorded message to the called party's answering machine will continue until the message ends and the call will then be disconnected automatically.