5.2 Dispositions and Notes

Bright Pattern Documentation

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Dispositions Tab

Dispositions are used to specify the result of an interaction attempt. For example, a disposition may indicate that the requested service was provided, or it might suggest a specific reason why it was not provided. Dispositions are stored in the interaction records and campaign results. They can be used in custom queries and reports for evaluation of service efficiency.

Note: The Dispositions tab is displayed only if the **Use dispositions** option is selected on the Properties tab.

In outbound campaigns, dispositions are also used to determine subsequent processing of calling records depending on the outcome of each call attempt. See section Outbound - Dial Rules for more information. In outbound campaigns, some of the dispositions can be applied to entire calling records and some others to individual call attempts.

For outbound campaigns of preview type, dispositions are also usually defined for preview records. In such campaigns, agents receive calling records from the system and preview them before making the corresponding outbound calls. During the preview, they may decide to discard some records without dialing. Dispositions in this case can indicate the reason (e.g., incomplete data).

For blended services, inbound dispositions are processed within the context of the campaign that is part of the same service. For example, if a customer misses your campaign call and then calls back using the campaign's caller ID and buys the product you have been offering within the campaign, the disposition of that inbound call should normally prevent subsequent attempts to call this customer within the same campaign. Therefore, for blended services it is important that the

- Inbound and outbound dispositions correlate (i.e., the former normally should be a subset of the latter)
- Outbound portion of your blended campaign is kept enabled at all times--even during the periods without any outbound activity

If the reason for a failed interaction attempt can be recognized automatically, the corresponding disposition can be provided by the system. Dispositions that are specified manually will be displayed by the Agent Desktop and can be selected by the agent at any time during interaction handling, including the after-call work. Dispositions can also be set by a scenario.

How the Dispositions tab looks for an email service

Screen Properties

Show dispositions for

This option is displayed only for outbound and blended voice services. To review and edit dispositions for inbound calls and list records, select **inbound**. To review and edit dispositions for outbound calls and list records, select **outbound**. To review and edit dispositions for preview records, select **preview record**.

List of dispositions

This option lists the dispositions for this service. For the services that comprise different types of interactions (inbound, outbound, preview records), the list will display only the dispositions corresponding to the interaction type selected via the *Show dispositions for* option.

For each interaction type, the system provides a pre-defined set of dispositions. You can edit such predefined dispositions, remove some of them, define new ones, and arrange them in your own folders. The purpose of each predefined disposition is explained in the *Description* field, which you will see when you click a disposition once.

Even though the system provides a predefined set of dispositions for each new service, you can still control whether these dispositions will or will not be made available to agents for selection when they handle interactions associated with the given service. Furthermore, you can control whether the use of dispositions is mandatory or optional. For more information, see the description of settings *Use dispositions* and *Require dispositions* in the Services and Campaigns - Properties tab.

Dispositions properties editor

To create a disposition in an existing folder, click **add** in the desired folder; this will open the dispositions properties editor, allowing you to configure the following. To edit a disposition, hover over the disposition and click the **edit** icon. To delete a disposition, hover over the disposition and click the **delete** icon.

Dispositions properties editor for a voice service

Name

This field is where you specify the disposition’s name. Note that this field is mandatory and must be unique within the given interaction type within the service.

Description

This optional field allows you to provide a free-text description of the disposition.

Agent can select

By default, dispositions that you define will be made available to agents for selection during interaction handling. If you do not want the given disposition to be shown to agents (e.g., you intend to use this disposition in scenarios only), unselect the **Agent can select** checkbox. Note that dispositions unavailable to agents appear in the disposition list in italic.

Show in toolbar in team queue

This option, available for email services only, allows you to configure an icon for the disposition, which is displayed as a button in the team queue and personal queue toolbar when an email's corresponding checkbox is selected. This button allows agents to apply a disposition to an email without opening it, thus removing it from the queue. Note that when configuring this option, you must select a corresponding toolbar icon.

Buttons mapped to either the Final disposition or Spam disposition apply the Resolved status to all selected emails. Buttons mapped to the Nonfinal disposition do not apply a different status to the selected emails (i.e., all selected emails will retain the New status). On this note, it is recommended that buttons are mapped to dispositions of the Final type to prevent important emails from accidentally being removed from the queue.

Toolbar icon

When the Show in toolbar in team queue option is selected, the *toolbar icon* option appears; this setting lets you map an icon to a disposition that will be displayed as a button in Agent Desktop's team queue and personal queue. To map the icon to the disposition, select the **search** icon or click **icon search** to access the drop-down list of toolbar icons.

Select an icon to add to your team queue's toolbar

Type

Type is a disposition category that executes specific actions when applied to an interaction; available types vary per service. The following is a list of all disposition types. **Note**: Dispositions considered final (i.e., ones that complete records or cases) are editable by those with the privilege Can update final dispositions only.

Success (completes record or case)

Success is for dispositions indicating successful interaction processing (e.g., the customer has accepted the offer) or closure of a case.

Final (completes record or case)

Final is for dispositions indicating successful interaction processing (e.g., the customer has accepted the offer) or closure of a case; this type is available for email services only.

Failure (completes record)

Failure is for dispositions indicating unsuccessful interaction processing without subsequent attempts (e.g., the customer has rejected the offer); this type is available for voice services only.

Do not Call (completes record)

Do not Call is for dispositions indicating that the customer has requested not to be contacted again for the given reason; this type is available for voice services only.

Continue

Continue is for dispositions indicating unsuccessful interaction processing with possible subsequent attempts (e.g., the customer has asked to be called again at another time) or expected continued processing of a case; by default, any new disposition of this type is associated with action Reschedule (24h); for more information, see section Outbound - Dial Rules.

Nonfinal

For dispositions indicating unsuccessful interaction processing with possible subsequent attempts (e.g., the customer has requested to be contacted at another time) or expected continued processing of a case; this type is available for email services only.

Spam

For dispositions indicating an immediate closure of an email case because the incoming message was spam

For services that comprise different types of interactions (inbound, outbound, preview records), you can also specify if the disposition you define for one interaction type shall be available for interactions of other types within the same service. Select such desired additional interaction types via the *Scope* option.

Code

If, in addition to the disposition name, you would like to use a short alphanumeric code (string), specify it in the **Code** field. Disposition codes are optional, and when defined, will appear in campaign results along with disposition names. Codes can also be used instead of disposition names when setting dispositions in scenarios.

There are no predefined disposition codes because you can assign any string to be a disposition code. A disposition code can contain up to nine characters; any characters are allowed. Note that the system does not check uniqueness of disposition codes.

Add folder

The *add folder* option allows you to create a new folder for dispositions. To add a new folder, click**add folder**, specify the folder name, then add the desired dispositions.

Import

The *Import* option imports dispositions and allows you to define dispositions externally and import them in the .CSV format. For each disposition, the following fields must be defined in the specified order:

- Name
- Folder name (disposition category)
- Description
- Code
- Agent can select (true, false)
- Type (SUCCESS, FAILURE, CONTINUE, DO_NOT_CALL)
- Is inbound (true, false)
- Is outbound (true, false)
- Is preview (true, false)
- System type (if defined, the disposition will be followed by the same actions that are defined for the

corresponding default dispositions in the Connection Problem and System folders)
    - Possible values include the following: empty string, DROPPED, BUSY, NO_ANSWER, FAX_MODEM, ANSWERING_MACHINE, SILENCE, INVALID_NUMBER, OTHER_CONNECTION_ISSUE, ABANDONED, CONGESTION_REMOTE, NO_AGENT, NO_DISPOSITION, SKIPPED, SYSTEM_FAILURE, AGENT_FAILURE, FINALIZED_BY_DIAL_RULE, MAX_ATTEMPTS_REACHED, DISPOSITION_NOT_FOUND, PHONE_NETWORK_UNAVAILABLE, RECORD_EXPIRED, CALL_FAILED, FAST_BUSY, ANNOUNCEMENT, NETWORK_ANNOUNCEMENT
- Service type (since many dispositions are service/media-type-specific this field must be defined to make sure that the dispositions are not imported into a type of service they are not intended for)
    - Possible values include the following: INBOUND, OUTBOUND, BLENDED, CHAT, EMAIL

Each value must be enclosed in the quotation marks. Optional parameters must be set to an empty string when not defined.

An easy way to create an import file is to export an existing list of dispositions (see *Export* below) and modify it as may be necessary.

Export

This option exports dispositions in .CSV format. The exported file can be used as a template when defining dispositions externally and importing them into the system. For specification of the fields, see the description of the *Import* function.

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*.

Ringing

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 Release a Call

At the end of the conversation, a call can be released by either yourself or by the other party on the call. If the other party terminates the call, you do not need to do anything in order to release this call on your side.

There are several ways to release the call from your side:

- Click the **End call** button .
- Click the **X** icon that appears when you mouse over this call in the *Active Communications List*.
- Use the **Alt-Q** keyboard shortcut to release the current call.

End call button

If after-call work is used for the service associated with the release call, the *Contact Info Panel* will show the status of this call as *Wrap-up*, and the *User Status Indicator/Selector* will indicate that you are in the After Call Work state. Otherwise, you will be immediately switched to Ready or Not Ready, depending on the system settings and/or the state you may have previously requested.