5.2 List of Error Messages

Bright Pattern Documentation

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How to Use Favorite Contacts

If agents have the privilege **Use Favorites tab**, agents can mark contacts as favorites, so that the most-called customers remain accessible while agents are working in Agent Desktop.

Storing Contacts

You can store up to 50 frequently called contacts in your personal Favorite Contacts list.

Click the star to add a contact to Favorites

To store a contact in your Favorites, follow these steps:

1. Select the desired contact from the *Directory* or *Recent* tab, or enter it manually in the *Number Input Field*. The contact will appear in the *Contact Info Panel*.
2. Hold your cursor over the contact's name in the list, and click the button that appears. The button will change its appearance to .
3. If this is an existing contact from the Directory, it will be immediately added to your personal favorite contacts list. Note that you cannot change the names of directory contacts.
4. If this contact is not from the directory, you may add the contact as a new record by providing a name, photo, and email address (if any). Note that if you do not enter a display name for the contact, the name will be shown as "Anonymous" by default.

Adding a contact to Favorites

Adding and Updating Contacts

You can also add a contact to your favorites while having an active call or chat with this contact.

You can change information about your favorite contacts (unless they are Directory contacts) at any time. To change the information, select the contact and click **Edit**.

Calling Your Personal Favorites

To make calls to the contacts in your personal favorite contacts list, follow these steps:

1. Click the *Favorites* tab.
2. Select the contact you wish to call. The contact will appear in the *Number Input Field*.
3. If necessary, select the service as described in section How to Make an Outbound Call.
4. Click the **Initiate call** button.

Removing Favorites

To remove a contact from your favorites, select it in the *Favorites* tab and click the button in the *Contact Info Panel*.

How to Make Yourself Ready

You manually make yourself *Ready* to indicate your readiness to handle interactions. You can make yourself *Ready* if your current state is either *After Call Work* or *Not Ready*.

To make yourself *Ready:*

1. Click the **User Status Indicator/Selector.**
2. Select **Ready** from the drop-down menu or press **F9.**

Making yourself Ready

Your state changes to *Ready*. You may now receive an interaction matching your qualifications at any time.

Listening to Voicemail Messages

If your voicemail function is enabled, you will receive an email notification every time someone leaves you a message. The system may be configured to attach voicemail recordings as audio files to such emails. Alternatively, the system may only email you a link and ask you to authenticate yourself before you can listen to the message.

If a voicemail recording is delivered to you as an attachment, you can open the attached file directly from within the email message. The file will be opened for playback in your default media player. Subsequent operations with this file may be governed by certain policies of your organization; from the technical standpoint they are not different from operations with any other email attachments that you can open at any time, forward to other people, save on your computer for later use, and so forth.

Links

If the email notification contains a link, click the link.

While logged in to Agent Desktop

If you click the link while logged in to the Agent Desktop application, the system will immediately place a call to the device that was selected at the time of login.

While not logged in to Agent Desktop

- If you are not logged in to the Agent Desktop application, a new browser tab or window will appear with a login dialog.
- Enter your username and password. These are the same username and password that you use to log in into the Agent Desktop application.
- Click the **Log in** button. The system will try to place a call to the phone that is permanently assigned to you in system configuration (default phone).

You will be alerted about the above call as if it were a regular incoming call.

Playback

Playback of the voicemail message will begin as soon as you answer it. You can use the dial pad of your Agent Desktop application or your regular phone to control the message playback.

The following controls are available to you during playback:

- *To replay the previous 10 seconds of the message, press* ***1***
- *To skip the next 10 seconds of the message, press* ***3***
- *To replay the previous 30 seconds of the message, press* ***4***
- *To pause or resume playback, press* ***5***
- *To skip the next 30 seconds of the message, press* ***6***
- *To replay the message from the beginning, press* ***7***

After the message playback is finished, you can release the call as if it were a regular phone call. Otherwise, the system will wait for 15 seconds before disconnecting this call automatically. This gives you a chance to replay the message by pressing **7**.

To listen to the message again after the call is disconnected, open the original email notification, and click the link. Even if you are not logged in to the Agent Desktop application, you will not need to re-authenticate yourself provided that you click the link within five minutes of your initial voicemail login.

Storage

By default, the system stores voicemail messages for 90 days. However, since this is a configurable parameter, you should confirm the storage period with your system administrator.

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.

No phone

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

Contributing Content to the Knowledge Base

Depending on your qualifications, you may be able to edit existing articles in the*Knowledge Base* and add new articles to it. If you are authorized to contribute content to the Knowledge Base, you will see editing controls when you click the *Knowledge* tab.

Knowledge Base with editing controls

To edit or delete an existing article, select it from the list above and click the **Edit** or **Delete** button respectively. To add a new article or folder, click the **Add** button and select the type of item you wish to create.

If you are adding a folder, in the dialog window that appears select the*Parent Folder* for the folder that you are creating (leave the field blank to create your folder in the root folder), and enter the name of the folder. The name should be unique within the parent folder.

If you are creating or editing an article, define or edit its properties in the dialog window that appears. Most of this properties are explained in section How to Use a Knowledge Base Article.

Creating or editing a Knowledge Base article

Note the following:

- The name of the article (the *Title* field) should be unique within the parent folder.
- To create the article in the root folder, leave the *Parent Folder* field blank.
- When assigning an article to a service, select the *Assign* checkbox. This association will be used to limit the article search by the service assigned to email interactions. You can assign an article to any number of services.
- If you select the *As default* checkbox, the *Answer* text of this article will be automatically inserted into draft reply to every email associated with the given service.
- You can use substitution fields in the *Answer* text. These fields will be replaced with data that the system will obtain from your working session and the email that you are replying to. The following substitution fields can be used:
    - *$(user.firstName)* – first name of the agent who will be using this article for reply

- *$(user.lastName)* – last name of the agent who will be using this article for reply
- *$(from.name)* – customer's name (the display name taken from the *From:* field of the email for which the given reply is composed); note that this name may not always be available
- *$(from.emailAddress)* - customer's email address (the email address taken from the *From:* field of the email for which the given reply is composed)
- *$(case.number)* – number of the case this email is related to
- *$(app.emailAddress)* – service email address (the email address taken from the *To:* field of the email for which the given reply is composed)
- *$(cursor)* – position of the input text cursor immediately after the article is inserted in the draft reply

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- Enter your username and password. These are the same username and password that you use to log in into the Agent Desktop application.
- Click the **Log in** button. The system will try to place a call to the phone that is permanently assigned to you in system configuration (default phone).

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Selecting a Phone Device

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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.

No phone

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

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Installing and Updating the Agent Desktop Helper Application

Although Agent Desktop is a browser-based application, a small subset of its functions is implemented in a software component that you may need to download and install on your computer. This component is called the Agent Desktop Helper Application. Thus, when you start the Agent Desktop on your computer for the first time, you may see a warning message such as the message shown.

The exact text of the message and your actions will depend on the type of browser you use. Follow the instructions of the message to install and enable the Agent Desktop Helper Application component on your computer.

Agent Desktop update message

If You Do Not See a Warning

If you do not see the warning message when you log into your computer for the first time, this usually means that the Agent Desktop Helper Application component has been preinstalled for you. You can check if the component is installed on your computer by looking up its name in the list of installed programs (*Windows Start Menu* > *Control Panel* > *Programs and Features*).

If You Use Chrome

For the Chrome browser, you should also check whether the corresponding*Agent Desktop Chrome Extension* is installed and enabled in your Chrome browser (*Chrome* > *Settings* > *Extensions*).

If You Use Internet Explorer 11

If you use Internet Explorer 11 or higher as your browser for the Agent Desktop login application, the browser's Enhanced Protected Mode must be disabled in order for all Agent Desktop application logs to appear in the same folder (*C:\Users\<UserName>\AppData\Local\Temp\logs*).

To disable the Enhanced Protected Mode:

1. In the browser application, click **Tools** (Alt+X) and select **Internet options**.
2. Click the **Security** tab, and unselect the **Enable Enhanced Protected Mode** checkbox.
3. Click **OK**.

From time to time, the Agent Desktop Helper Application may have to be updated to support new system functionality. When a new version of this component becomes available, you may see a warning message similar to the one discussed above prompting you to upgrade. Follow the instructions of the message to update and enable the Agent Desktop Helper Application component on your computer.

Your attempts to install/update Agent Desktop Helper Application may be blocked by your browser (depending on its security settings) and/or some anti-virus software running on your computer. Typically, in this case, you will see a warning message asking you either to cancel or confirm the download/install. Choose the confirm/allow/proceed option to proceed with the installation/upgrade. If in doubt, contact your system administrator.

Selecting a Phone Device

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No phone

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

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 Make Yourself Ready

You manually make yourself *Ready* to indicate your readiness to handle interactions. You can make yourself *Ready* if your current state is either *After Call Work* or *Not Ready*.

To make yourself *Ready:*

1. Click the **User Status Indicator/Selector.**
2. Select **Ready** from the drop-down menu or press **F9.**

Making yourself Ready

Your state changes to *Ready*. You may now receive an interaction matching your qualifications at any time.

How to Make Yourself Ready

You manually make yourself *Ready* to indicate your readiness to handle interactions. You can make yourself *Ready* if your current state is either *After Call Work* or *Not Ready*.

To make yourself *Ready:*

1. Click the **User Status Indicator/Selector.**
2. Select **Ready** from the drop-down menu or press **F9.**

Making yourself Ready

Your state changes to *Ready*. You may now receive an interaction matching your qualifications at any time.