

5.2 Ways to Request Assistance

Bright Pattern Documentation

Generated: 12/03/2021 9:52 am

Content is available under license unless otherwise noted.

Table of Contents

Table of Contents	2
How to Use Personal Chat	3
How to Send Personal Chat Messages	3
From the Directory	3
From the Chat Center	4
Additional Features of Personal Chat	5
Starring a Message	5
How to Make a Consultation Call	7

How to Use Personal Chat

At any time during your working session, you can send a Personal Chat message to your supervisor or another member of your team. The use of Personal Chat does not affect your operations with service interactions in any way.



Overview of Personal Chat

How to Send Personal Chat Messages

There are two ways to send Personal Chat messages:

1. From within the [Directory](#)
2. From the *Personal Chats* section of the *Chat Center*.

From the *Directory*

- Select the desired contact from the [Directory](#).
- Clicking the **Chat** icon next to the contact's name in the *Directory* will launch a new chat.

- To send a message, type in the *Text Input Field* area, then press the **Enter** key or click on the **Send the message** icon.



Chat from within the *Directory* while working in other areas

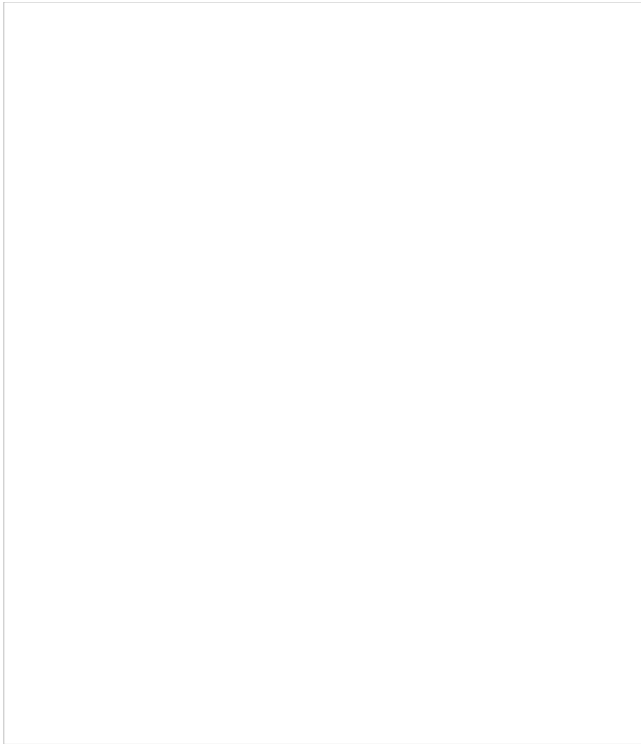
From the *Chat Center*

- To access the *Chat Center*, click on the icon.
- Next, go to the *Personal Chats* section and click on the + icon to bring up the *Directory*.



Choose *Select from Directory*

- From the *Select Agent for Chat* directory, search for the contact you would like to message, click on their icon, then click the **Select** button.



Select the user to initiate chat

- To send a message, type in the *Text Input Field* area, then press the **Enter** key or click on the **Send the message** icon.

Additional Features of Personal Chat

- For added organization, it is possible to filter messages by *day, week, month, or all*.
- Messages will appear with a timestamp in the chat transcript area above the *Text Input Field*.

Starring a Message

It is possible to bookmark important, individual messages within a chat by clicking the **Star** icon. When you star a message, it becomes pinned to the area right of the chat in the *Chat Center*. Please note: You can only star received messages, not sent ones.

To star a message, follow these steps:

1. Find the message.
2. Click the **Star** .
3. The star will have changed from a light color to a dark color .

From here, you will see the starred message appear in the area to the right of the chat.



Example of a starred message

When you click on the starred message, it will act as a shortcut, bringing the message to the top of the chat area.







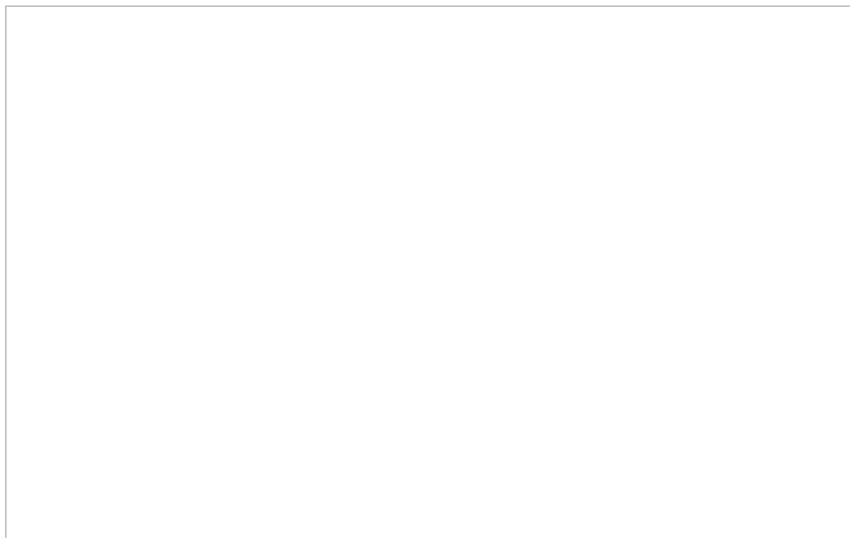
Starred messages act as bookmarks within a Personal Chat

How to Make a Consultation Call

A consultation call is a call you make with respect to another active call on your desktop.

Follow these steps to make a consultation call:

1. Place your primary call on hold first. See [How to Hold and Retrieve a Call](#) for more information.
2. Make a call to the consultation party. See [How to Make an Internal Call](#) or [How to Make an Outbound Call](#) for more information.
3. The *Active Communications List* will display both calls, the primary call with the hold icon , and the consultation call with the outgoing call icon .
4. If the consultation party is an agent or a supervisor, you can send the content of the *Context Information Area* related to the primary call by clicking the **Send Screen**  button.
5. After finishing the consultation, click the **End Call** button  to release the consultation call. (You can instead transfer your primary call to, or conference it with, the consultation party. See [How to Transfer a Call](#) and [How to Host a Conference](#) for more information.)
6. Retrieve the active call. See [How to Hold and Retrieve a Call](#) for more information.



Primary and consultation call in the Active Communications List

Note: You can also alternate between the primary and consultation calls by retrieving them in turn. (Clicking the **Retrieve** button will automatically put the current active call on hold).