

5.3 Agent Guide

Bright Pattern Documentation

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Welcome to Agent Desktop

The Bright Pattern *Agent Guide* provides instructions for using Bright Pattern Contact Center Agent Desktop, a cloud-based software application that enables you to perform various telecommunication and customer service tasks in Bright Pattern-based private branch exchange (PBX) phone system and contact center environments.

Learn how to use Agent Desktop by exploring the following sections of the *Agent Guide*:

- [Setup](#)
- [Working in Agent Desktop](#)
- [Tutorials](#)
- [Troubleshooting](#)

Audience

The *Agent Guide* is meant to be used as a reference manual, tutorial, and operational handbook by:

- Contact center agents who will use Agent Desktop to provide customer service over the phone and other supported media channels
- Contact center supervisors^[1] who will use Agent Desktop to manage and monitor their teams
- Campaign operators who are assigned to manage their contact center's outbound campaigns
- Back office employees who will use the Agent Desktop application for their business communications

Prerequisites

Readers of this guide are expected to be familiar with basic operations with computer (Windows/Mac) operating systems and Internet applications.

1. [↑] Agent Desktop features a separate set of functions for supervisors and campaign operators. These functions are discussed in the Bright Pattern [Supervisor Guide](#).

What is Agent Desktop?

Agent Desktop is a web based cloud software application that helps businesses provide effortless customer service on the channels that customers prefer. A powerful communications platform, Agent Desktop helps contact center agents, supervisors, and back office employees build customer relationships and fulfill requests efficiently on the phone, in chat, in email, via text messaging, and more.

Made for facilitating interactions, Agent Desktop allows you to correspond with people in any locale, from any web browser—to talk and message, all you need is a high-speed Internet connection and a headset. It's through these interactions that you will manage customer cases, resolve problems, and maintain meaningful relationships with customers.

The *Agent Guide* explains in detail the types of interactions you can have with customers, referred to as *contacts*, and all the different ways that cases can be managed.



An agent processes a call from her customer Jeanne

Supported Channels

Agent Desktop facilitates all of the interactions you may have with customers on any media channel. *A channel* is the type of media used by customers to contact your business (e.g., voice call, chat, email, etc.). Because of the nature of customer service, most customers will reach out to your contact center on any available channel for problem resolution and/or issue requests. As the primary focus of Agent Desktop is based on interactions and cases, the *Agent Guide* focuses on how to have interactions through the supported media channels.

Agent Desktop recognizes the following channels:

- [Phone calls](#)
- [Chat](#)
- [SMS](#)
- Social messengers^[1]
- [Email](#)

By incorporating so many channels, Agent Desktop enhances your ability to fulfill customer needs. Each interaction can be catered to the customer's channel preference, allowing you to provide the best experience possible.

For example, a customer who reaches out to you on the phone can ask to continue the interaction via text/SMS instead. Or, a customer who starts chatting with you on your company's website can be switched to Facebook Messenger or another social messenger. This flexibility helps you to provide consistent customer service across a variety of channels.

Omnichannel

The ability to handle multiple interactions of different types is called *omnichannel*. Not to be confused with *multichannel*, where your contact center is simply able to provide customer service over multiple media channels, true *omnichannel* is when your contact center offers customer service over multiple channels *and* agents can handle more than one active interaction, of different types, at the same time.

For example, let's say you are helping Customer A to schedule an appointment via web chat and you see an incoming call request from Customer B. You accept the call, start talking to Customer B, and while talking, you're able to wrap up the web chat with Customer A. This ability to handle these different types of interactions simultaneously is *omnichannel*.

Bright Pattern's omnichannel routing system intelligently calculates your capacity to handle various interactions, and routes incoming interactions to you automatically based on your skills and availability. The system ensures that you will only receive the interactions that you are able to handle.

Personalize Interactions with Agent Desktop

Bright Pattern builds in automatic identification and activity history (called [activities](#)), ensuring that when a call comes in, you already know who the customer is and why they are calling. Known contact and case data can be [screen-popped](#) to your Agent Desktop, helping you to review the customer's previous interactions and personalize the call you're having.

Driven by integrated AI, sentiment analysis across channels allows both agents and supervisors to zoom in on problematic interactions on the fly, as well as understand a customer's overall case. During any interaction, a happy, neutral, sad, or angry face icon provides an instant snapshot of customer satisfaction.

All phone calls, chats, emails, texts, messenger messages, video chats, case notes, call recordings, chat transcripts, and more, are wrapped up in a customer's activities, making it easy to know your customer, at a glance. You spend less time looking for information when you can see all customer activities on Agent Desktop.

Campaigns

So far, we've discussed the inbound calls, chats, and other interactions that you'll likely have on Agent Desktop. If enabled for your contact center, the outbound interactions you have with customers will be initiated through campaigns.

Campaigns are preconfigured call lists that allow your contact center to reach out to customers. Crucial to many contact centers, campaigns are usually centered on a specific topic (e.g., surveys, sales, etc.).

Agent Desktop allows your contact center to conduct different types of campaigns, including [predictive](#), [progressive](#), and [preview](#).

Intuitive UI

Designed to improve agent productivity, the Agent Desktop user interface places all tools and functions at your fingertips in a single window. From one screen, it's easy to send and receive calls and messages from your team and customer service queue.

[Talk](#) and [chat](#) using the your choice of [phone](#) (e.g., built-in softphone, hardphone, etc.) and take advantage of robust messaging capabilities, while viewing customer [cases](#), managing [contacts](#), handling [emails](#), scheduling [follow-ups](#), and much more.

Deliver consistent customer service across multiple channels using AI-assisted suggestions from integrated chatbots, along with company-approved replies, templates, and training articles in the knowledge base.

The [dashboard](#) displays at-a-glance metrics for yourself and your team, helping you to meet team goals faster.

Automated quality management features help your supervisor to monitor team calls and interactions, provide help during conversations, and review transcripts and recordings to evaluate and boost agent performance. Whenever you need help, just [flag](#) the interaction to get your supervisor's attention.

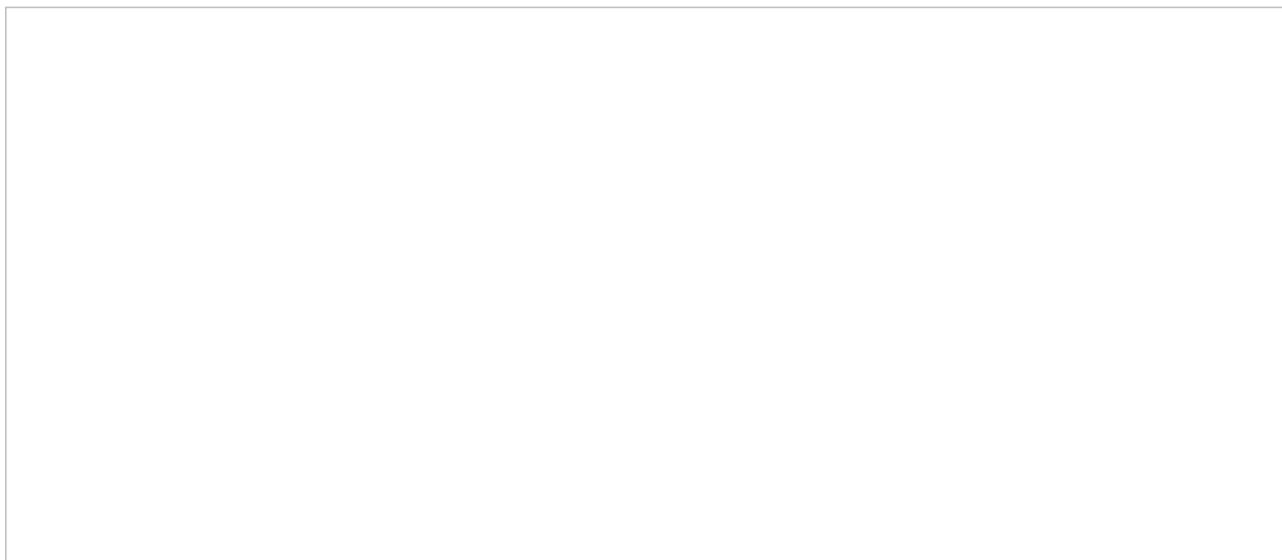
Thanks to advanced tools and tech, everything is presented in plain view, in the same browser window, so you can keep active interactions and important details in focus without having to Alt+Tab to another window.

Be sure to explore the *Agent Guide* to learn more about Agent Desktop's features and [user interface](#).

1. [↑](#) If configured for your contact center, these include Facebook Messenger, LINE, Telegram, and Viber.

Agent Desktop User Interface

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.



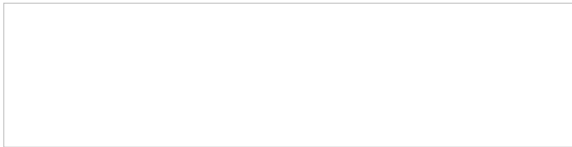
The elements of Agent Desktop

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.



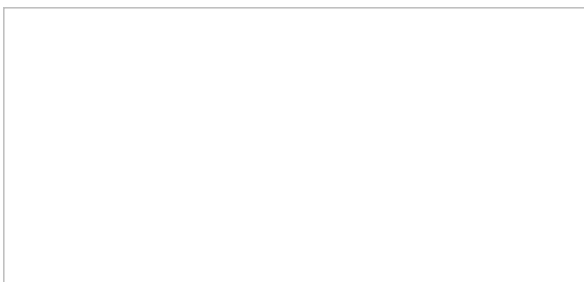
Active Conversations List

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



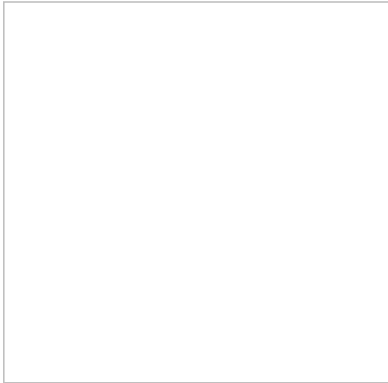
Contact Info Panel

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



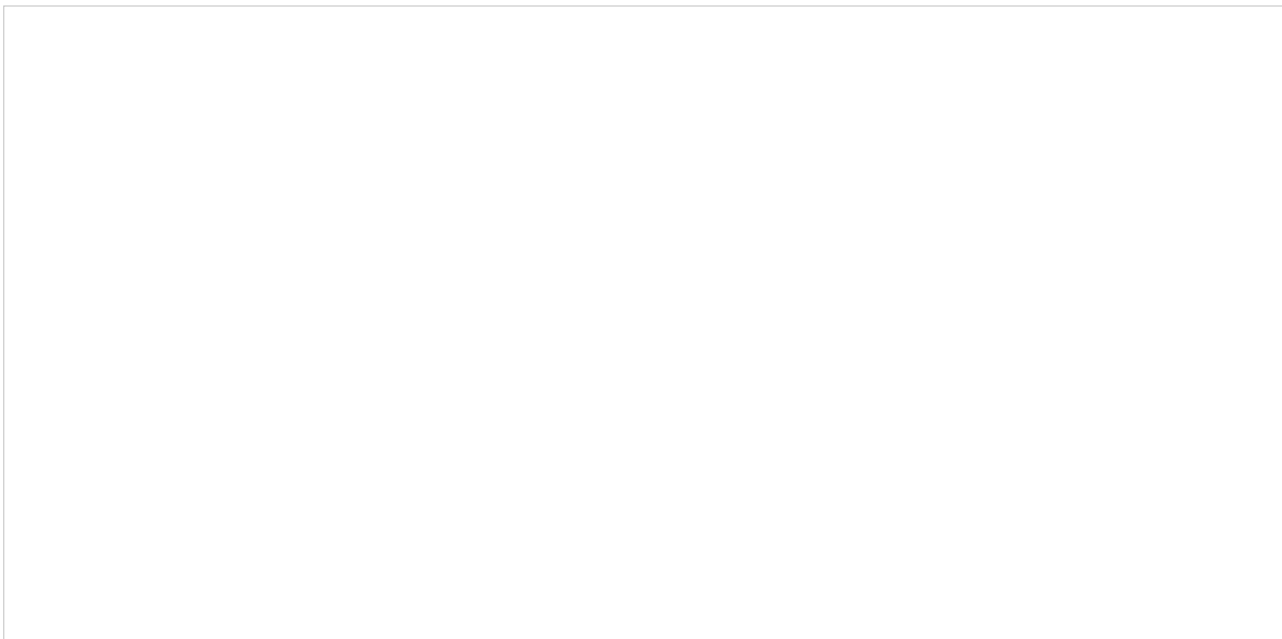
To show or hide the Active Conversations List in the Context Information Area, click the *Conversations* icon. When the Active Conversations List appears, you can access the Directory, Favorites, Recents, and Dial Pad.

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



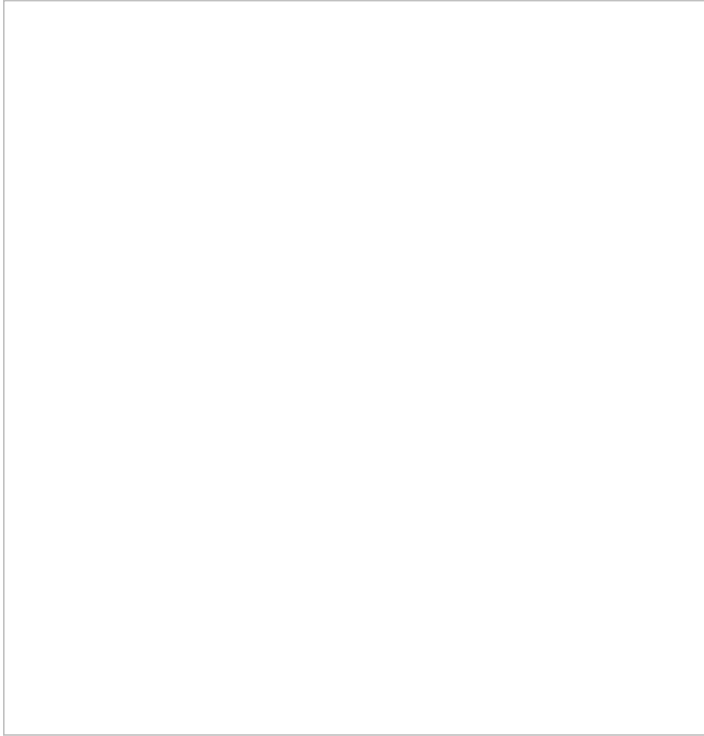
The Active Conversations List appears on the Agent Desktop

Directory



The *Directory* is your contact center's ready-to-use phone book, allowing you to browse through teams of agents, supervisors, or even important external contacts. The Directory stores the names, numbers, profile photos, and [user state](#) 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

If your contact center integrates with [Microsoft Teams](#) for company messaging and internal communications and you are [signed in to your Microsoft account](#), you may notice Teams-related items in the Agent Desktop directory, such as the following:

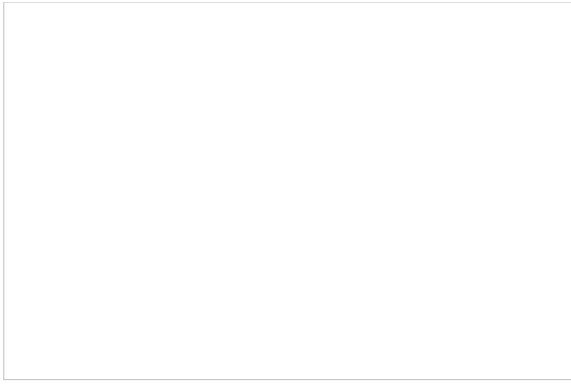
- [Microsoft Teams Channels](#) folder
- [Microsoft Teams Chats](#) folder
- Teams user personnel listed inside either the Microsoft Teams Channels folder or the Microsoft Teams Chats folder
- The user presence of Teams user personnel

Teams folders are only shown in the directory when Microsoft Teams integration is enabled for your contact center and you are signed in to Microsoft via your User Profile settings.

Favorites



The *Favorites* tab contains your personal list of frequent contacts; favorites may be both internal and external. Mousing over a Favorite contact'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/SMS/MMS to that contact.



Your favorite contacts

To add a contact to your Favorites list, mouse over the contact's information until a contact card pops. From here, you will be able to click the **star** button, which adds the contact to your Favorites.

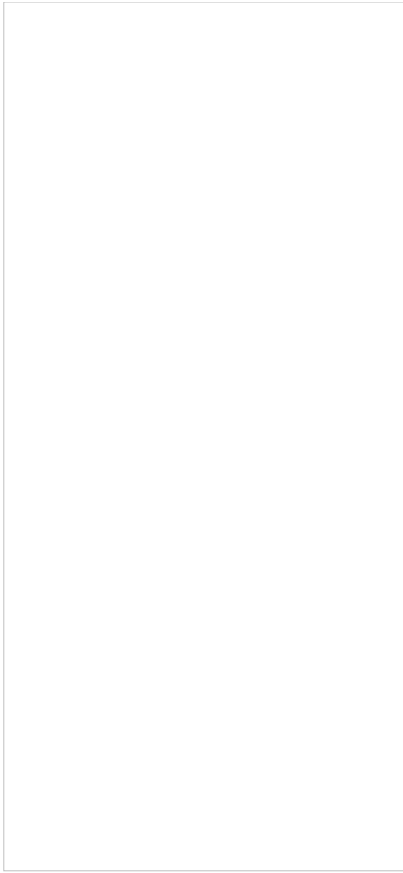


Add a contact to Favorites

Recent



The *Recent* tab displays all recent interactions you have processed, including internal system messages.

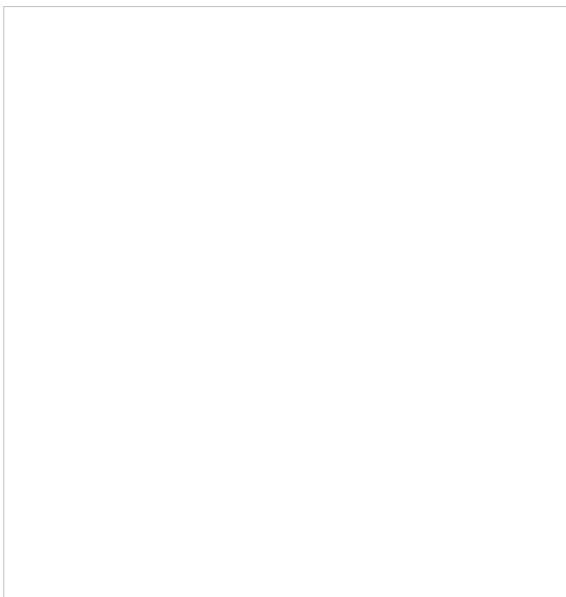


Recent list

Dial Pad



The *Dial Pad* is a standard phone dial pad; it can be used to dial outgoing calls or for selecting IVR menu options.



Dial Pad

Directory and Dial Pad

The *Directory and Dial Pad* button is a versatile tool that allows you to easily toggle between active interactions and the buttons displayed in the Conversations area (i.e., Directory, Favorites, Recent, and Dial Pad). Additionally, different information will be popped to you depending on how the button looks when you select it. Note that the behavior of this button changes depending on whether the Conversations area is open or closed.

The Directory and Dial Pad button has two different looks.

The first is a filled dial pad grid.



The second is an empty dial pad grid.



If the Conversations area is open and the button is displayed as a filled dial pad, clicking on it will display all the tabs normally seen in the Conversations area (i.e., Directory, Favorites, Recent, and Dial Pad are displayed); however, the Dial Pad is displayed by default. Note that if there are active interactions, they will be displayed in the Active Conversations List. If the Conversations area is closed, mousing over the button displays the same information.

Mouse-Over-Active-53.PNG

If the Conversations area is open and the button is displayed as an empty dial pad, clicking on it will display any active interactions (e.g., an active chat session). Any other active interactions will be displayed in the Active Conversations List. If the Conversations area is closed, mousing over the button displays the same information. Note that if there are no active interactions, selecting or mousing over this version of the button will display an empty Conversations area.

Mouse-Over-Inactive-53.PNG

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](#).

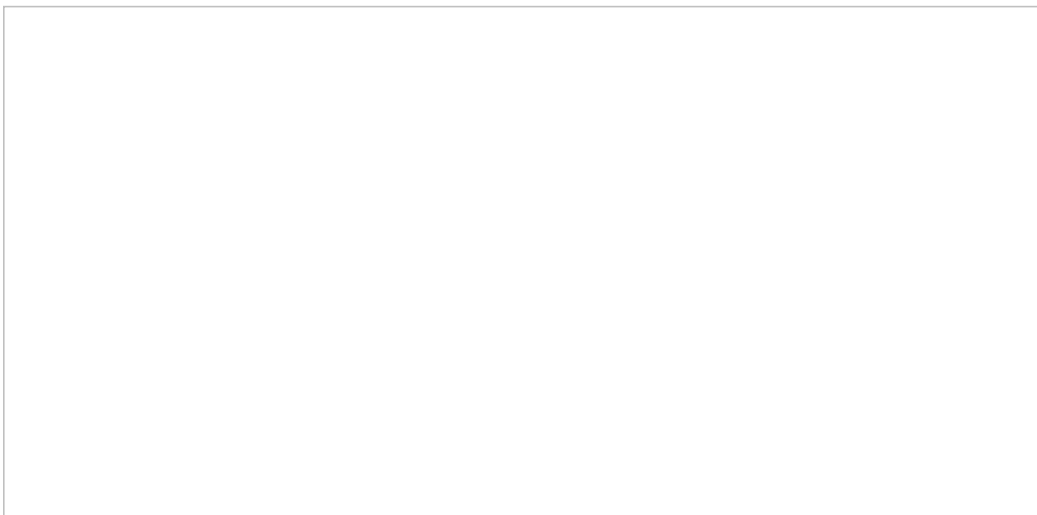


The Agent Desktop Calendar

My Cases



Click *My Cases* to work with email cases from your Team Queue, Personal Queue, or Pinned Cases 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

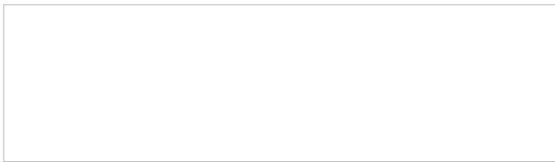


If you have not uploaded a user profile photo, Agent Desktop Settings is shown as a cog icon . If you have already uploaded a user profile photo, that same image is shown in place of the cog icon. Click either icon to update your settings.



Settings

Mousing over the user profile photo or the Settings cog icon will cause the first name, last name, and extension number of the logged-in user to be shown.



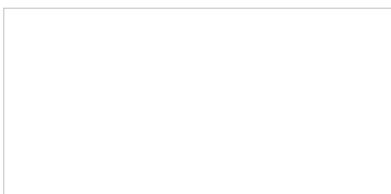
Mouse over Settings to view user name and extension

Note that in previous versions of Agent Desktop, the user's first and last name used to be displayed at the top of the Active Conversations List, next to the user status indicator. That area is now used for displaying contact information for the party with whom you are communicating.

Log out



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



Logging out of Agent Desktop


Context Information Area (at center of screen)

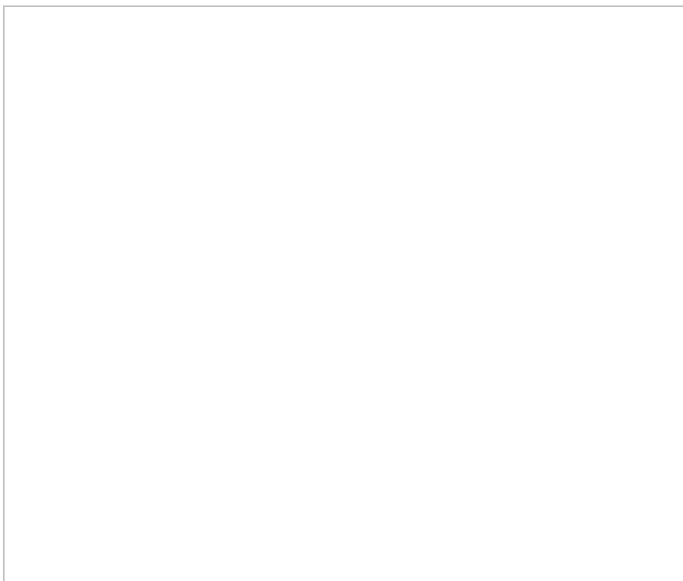
The *Context Information Area* displays web pages and forms that can be used to provide the information you need in order to serve your customers (e.g., customer profile) and enter new information based on your conversation with the customer (e.g., a purchase order). The appearance of content in this 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

Alerts

Alerts are orange icons  that indicate the number of items on a contact that require attention. Note that this may include unread emails and pending calendar events. In order to resolve the alerts, agents must complete pending calendar events and process/open any new emails.



Alerts indicate items requiring an agent's attention

Getting Started

In this section of the *Agent Guide*, you will learn how to log in and set up your Agent Desktop.

Before you can begin work, you must first make sure you have the following:

- Ability to [log in](#) with username and password
- Understanding of which [phone device](#) to select to use upon login
- [Agent Desktop Helper Application](#) downloaded and installed, plus any necessary browser extensions to make it work
- [User profile](#) set up with your contact details, including email address if using voicemail
- [Voicemail](#) enabled

After you have completed setup, you can move on to the next section of this guide, [Working in Agent Desktop](#).

Working in Agent Desktop

This section covers everything you need to know about using Agent Desktop in your day-to-day operations. During a typical working session, you will be interacting with contact center users and customers on multiple media channels (e.g., voice, chat, email, SMS/text, mobile messengers), using Agent Desktop at its full capacity.

Explore this section to learn more about any of the following aspects of Agent Desktop:

- [Accessibility](#)
- [Calendar](#)
- [Calls](#)
- [Cases and Email](#)
- [Chats](#)
- [Contacts](#)
- [Dashboard](#)
- [Home Page \(Formerly My Grades\)](#)
- [Knowledge Base](#)
- [Mobile App Interactions](#)
- [Outbound Campaigns](#)
- [Screen-Pop](#)
- [Search](#)
- [States](#)
- [Voicemail](#)

Agent Tutorials

Agent tutorials explain how to perform specific tasks within the Agent Desktop application.

Explore tutorials to learn more about the following topics:

- [Calendar](#)
- [Calls](#)
- [Cases and Email](#)
- [Chats](#)
- [Contacts](#)
- [Knowledge Base](#)
- [Microsoft Teams](#)
- [Outbound Campaigns](#)
- [Search](#)
- [States](#)

Help and Troubleshooting

The Agent Guide's Troubleshooting section is here to provide help when things go wrong. Learn the meaning of error messages, how to report problems, and how to request help.

Articles

- [Getting Help](#)
- [List of Error Messages](#)
- [Report a Call Quality Problem](#)
- [Send Agent Desktop Application Logs to Your Administrator](#)
- [Ways to Request Assistance](#)