

# 5.3 Setup

## Bright Pattern Documentation

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# 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](#).

## Agent Desktop Helper Application Quick Start

The Agent Desktop Helper Application is a software component that provides many functions for Agent Desktop ( [Read more](#).) This article will help you launch the Agent Desktop Helper Application on any browser, so you can get to work on Agent Desktop quickly.

Note: Agent Desktop Helper Applications for Windows and MacOS are both digitally signed with the corresponding OS vendor.

### Procedure

1. Log in to Agent Desktop.
2. If prompted by the warning message, **download** the Agent Desktop Helper Application installer (Mac: bpclient\_mac.pkg, Windows: BPClientSetup.exe) and **install** it on your computer.
3. If not prompted, you can download the installer by going to *Settings > About > Helper App version* and clicking **Update**.
4. If using...
  1. [Chrome](#), add the Agent Desktop Chrome Extension and **enable** it
  2. [Firefox](#), install the Agent Desktop Firefox Extension and **enable** it
  3. [Internet Explorer](#), **disable** the browser's Enhanced Protected Mode
  4. [Safari](#), just run the installer

5. Refresh the Agent Desktop webpage.

Need more help? See [Installing and Updating the Agent Desktop Helper Application](#) and section [Troubleshooting](#).

## Installing and Updating the Agent Desktop Helper Application

The Agent Desktop Helper Application is a software component that provides many functions for the Agent Desktop application, such as a softphone, screen-pop, logging, indication of audio device changes, alerts on all audio devices, screen recording and monitoring, and voice quality monitoring.

From time to time, you may be prompted by Agent Desktop to install the Agent Desktop Helper Application on your computer or enable it in your web browser. This article will guide you through the process of downloading, installing, and enabling the application on any browser.

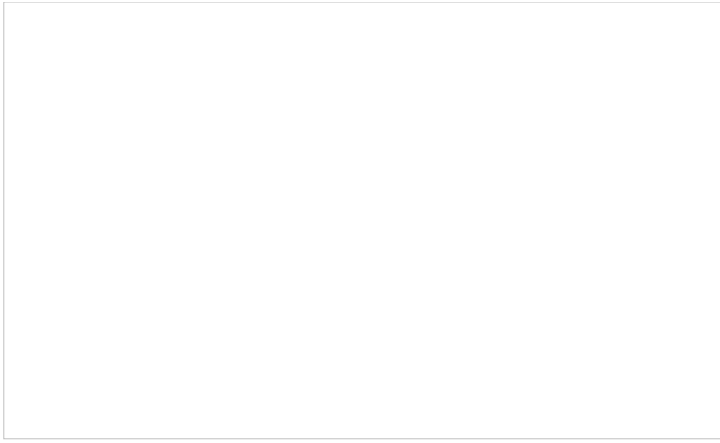
You don't need local system administrative privileges on your PC to set up and use Agent Desktop and Agent Desktop Helper Application

### When Do You Need the Agent Desktop Helper App?

You may be prompted by a warning message to download and install the Agent Desktop Helper application when...

- You log in to Agent Desktop for the first time.
- The Agent Desktop Helper app is not yet installed on your computer.
- Agent Desktop has been updated, requiring a higher version of the Agent Desktop Helper app.
- The app is being blocked by your web browser.
- The browser extension is not enabled.
- An error message indicates that the SIP phone has lost connection to the system.
- An error message indicates that you logged in with a softphone, but the Agent Desktop Helper app is not installed or is blocked by your computer.

A warning message such as the one shown contains instructions for installing and enabling the Agent Desktop Helper Application component on your computer. The exact text of the message and your actions will depend on the browser you are using.



Agent Desktop update message

## How to Enable the Application for Various Browsers

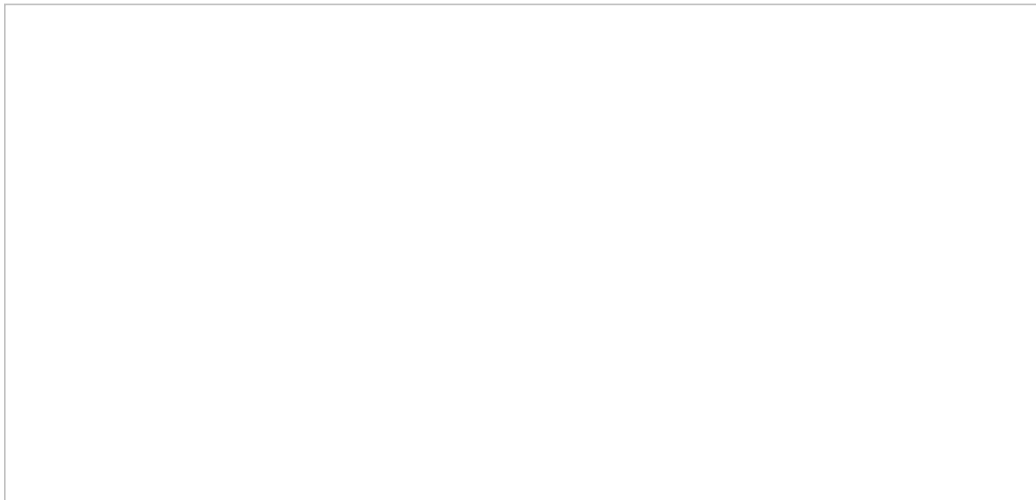
The Agent Desktop Helper Application is supported on Google Chrome, Microsoft Edge, Microsoft Internet Explorer, Mozilla Firefox, and Safari. Some browser extensions or other settings may need to be enabled, depending on your browser.

### Chrome

The Agent Desktop Helper Application is enabled for Chrome using an extension called **Agent Desktop Chrome Extension**.

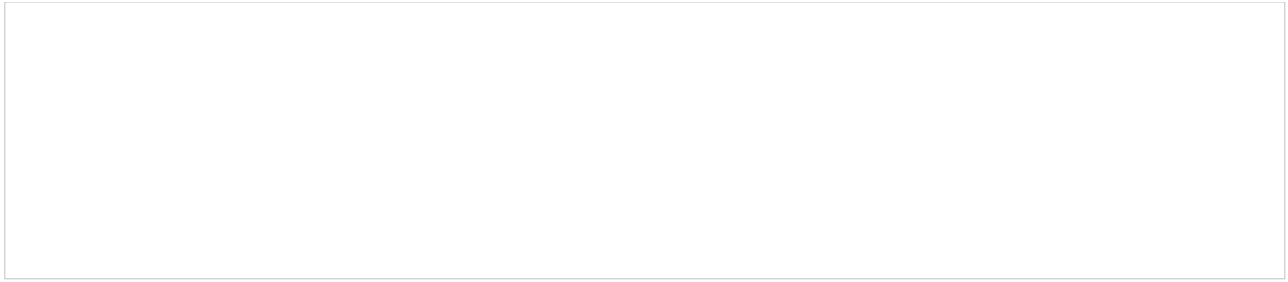
#### How to Enable the Extension for Chrome

1. When prompted by the warning message, follow the instructions to download and install the Agent Desktop Helper Application (Mac: *bpclient\_mac.pkg*, Windows: *BPClientSetup.exe*).



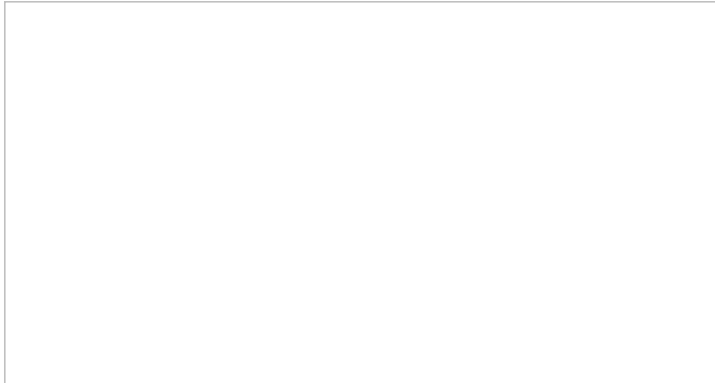
Agent Desktop update message

2. After installation is complete, go to the [Chrome Web Store](#) and click **Add to Chrome** to get the Agent Desktop Chrome Extension.



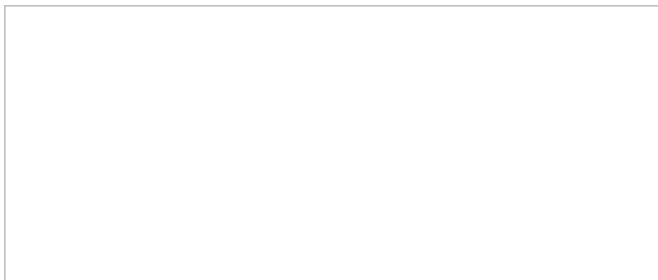
Chrome Extensions > Agent Desktop Chrome Extension

3. Then click **Add extension**.



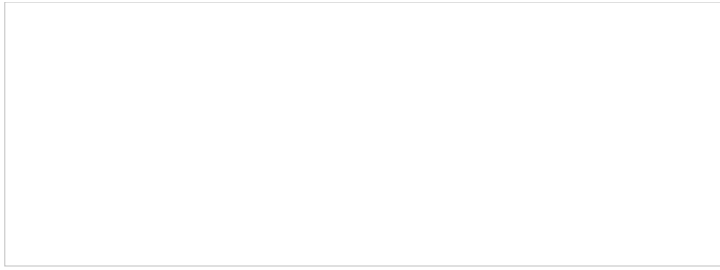
Confirm that you want to add the extension

4. Go to *Settings > Extensions* (or type "chrome://extensions/" in your browser's address bar), find the Agent Desktop Chrome Extension, and set the slider to **On**. Doing so will enable the extension for Chrome. When the slider is gray, the extension is not enabled. When the slider is blue, it is enabled.



Chrome Settings > Extensions > Agent Desktop Chrome Extension

5. Alternatively, you may enable the extension by clicking **Details** and setting the slider to **On**. The other settings in *Details* are optional.



Agent Desktop Chrome Extension details

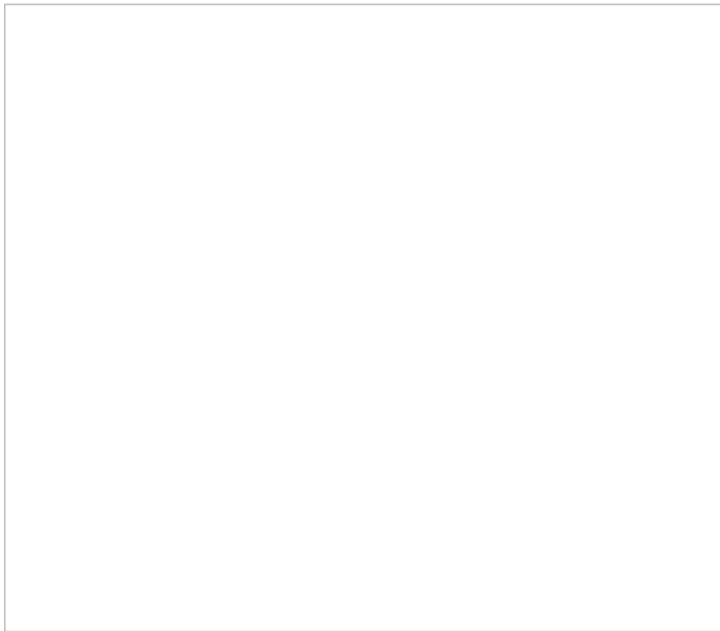
6. Go back to the Agent Desktop application and refresh the page. You can now begin using it.

## Edge

The Agent Desktop Helper Application is enabled for Microsoft Edge 85 and later using an extension called **Agent Desktop Chrome Extension**.

### How to Enable the Extension for Edge

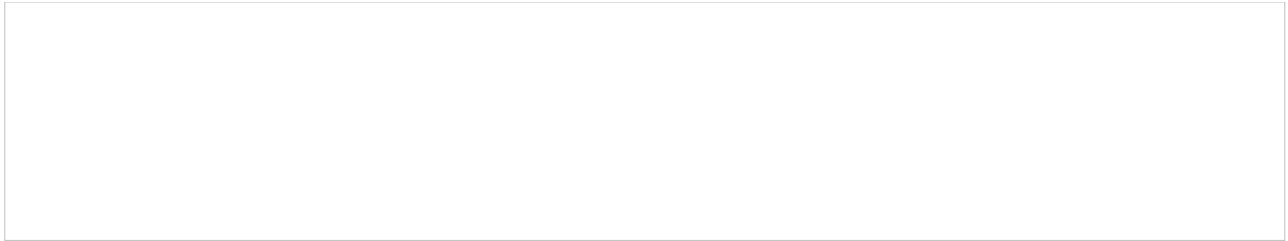
1. When prompted by the warning message, follow the instructions to download and install the Agent Desktop Helper Application (Windows: *BPClientSetup.exe*).



Agent Desktop update message

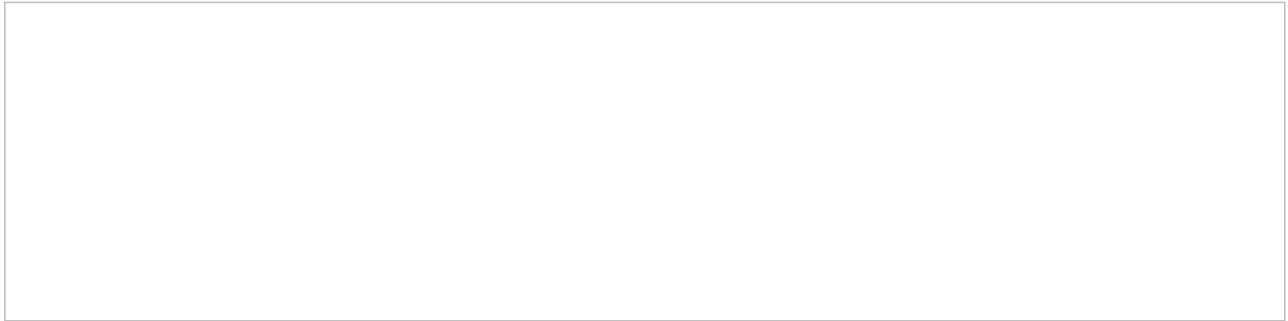
2. After installation is complete, go to the [Chrome Web Store](#) and click **Add to Chrome** to get the Agent Desktop Chrome Extension.





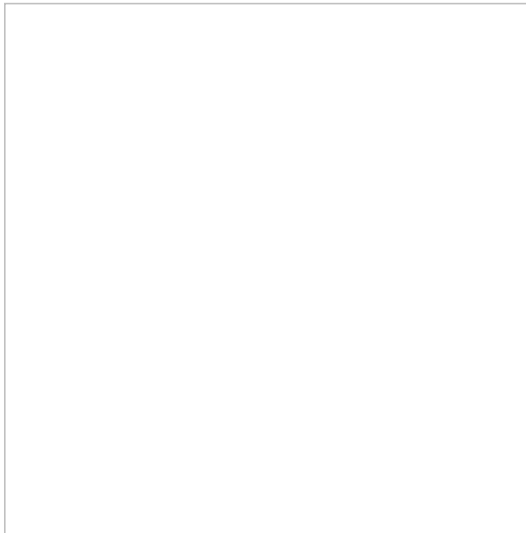
Adding the extension

3. Then click **Add extension**.



Confirm that you want to add the extension

4. You will then see the extension's icon in the Edge toolbar. To check that the extension is enabled for Edge, click the icon and then click **Manage extensions**.



Click **Manage extensions** to enable the extension for Edge

5. Set the slider to **On** to enable the extension for Edge. When the slider is black/white, the extension is not enabled. When the slider is blue, it is enabled.



Manage extensions > Agent Desktop Chrome Extension

6. Go back to the Agent Desktop application and refresh the page. You can now begin using it.

## **Firefox**

The Agent Desktop Helper Application is enabled for Firefox version 53 and later through the use of an extension called **Agent Desktop Extension**.

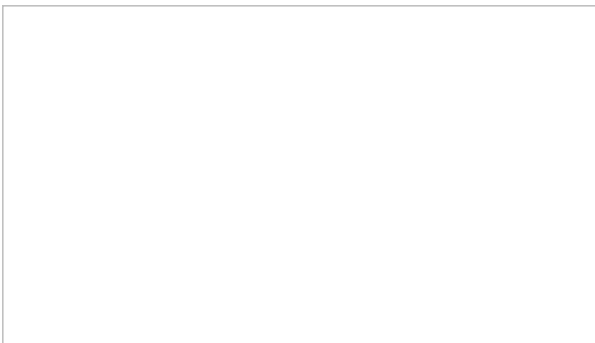
### **How to Enable the Extension for Firefox**

1. In Agent Desktop, you will be prompted by a warning message.



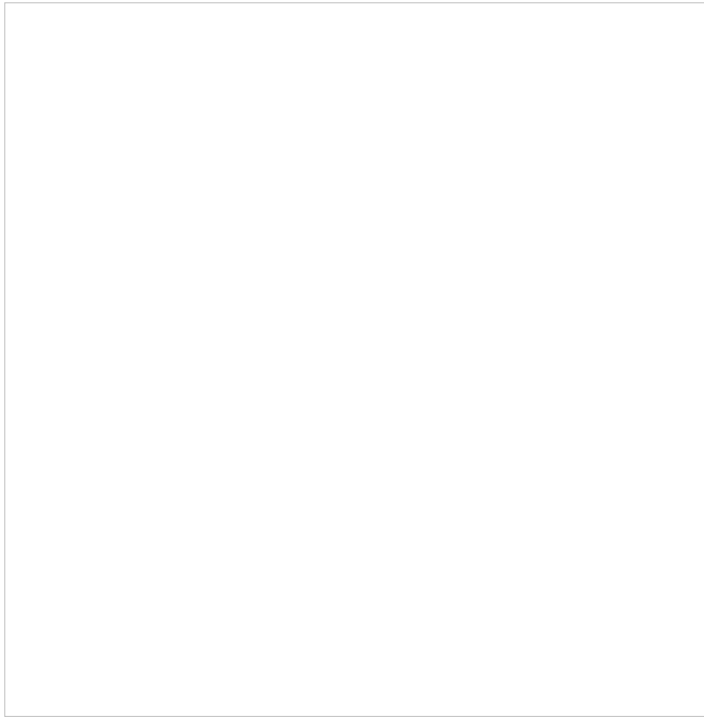
Example of an Agent Desktop warning message

2. Follow the instructions in the message to download the Agent Desktop Helper Application (Mac: *bpclient\_mac.pkg*, Windows: *BPCClientSetup.exe*) and install and enable the Agent Desktop Extension:
  1. Click the **downloading** link to download the application.
  2. Run the installer, and follow all the instructions given on your screen.
  3. Click the **Agent Desktop Extension** link in the warning message to install the Agent Desktop Extension. Doing so will bring up a Firefox dialog such as the one shown, asking you to allow the Agent Desktop Extension to be installed as an add-on. Click **Continue to Installation**.



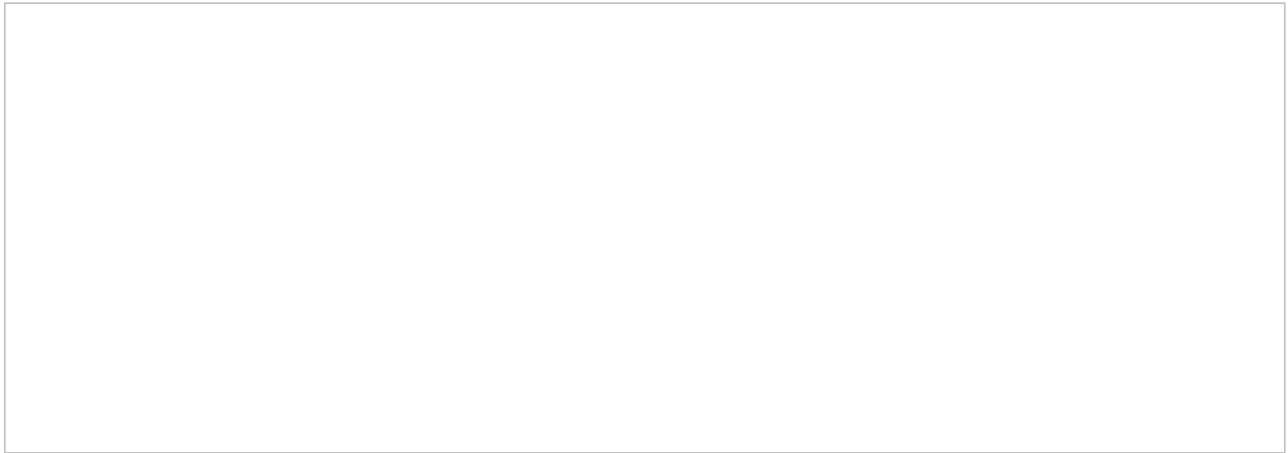
Example dialog for Firefox add-on installation

3. Make sure that the extension is enabled in Firefox Add-ons. Go to *Firefox Menu > Add-ons* (or type **about:addons** in the address bar of the browser to access the extension).



Firefox > Menu > Add-ons

4. The Agent Desktop Extension should be shown as **Enabled**, and the slider should be switched to **On**. When the slider is gray, the extension is not enabled. When the slider is blue, it is enabled.



Agent Desktop Firefox Extension in about:addons

5. If you click on Agent Desktop Extension, you can view and change the other settings for the extension. Those settings are optional.
6. You can now return to the Agent Desktop application. Refresh the page to begin using it.

## Internet Explorer

Internet Explorer does not require an extension, but if you use Internet Explorer 11 or higher, the browser's Enhanced Protected Mode must be disabled in order for all Agent Desktop application logs to appear in the same folder (e.g., "C:\Users\*<UserName>*\AppData\Local\Temp\logs").

The logs provide information about what has happened in the application while you were logged in. Having logs is important because you may need to provide them to your supervisor or administrator if ever you need troubleshooting assistance.

### How to Disable Enhanced Protected Mode

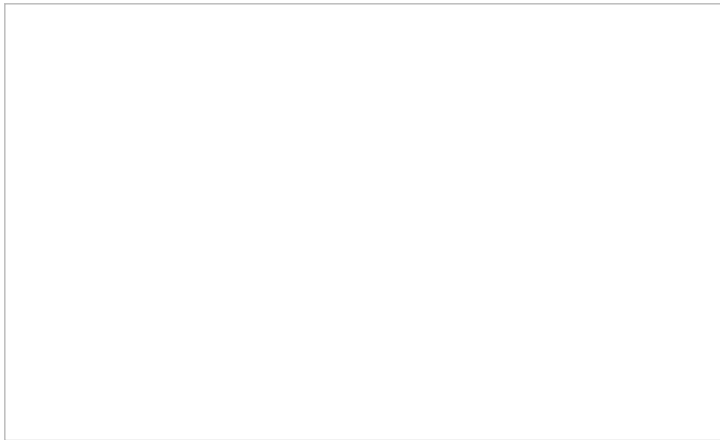
1. In the browser application, click **Tools** (Alt+X) and select **Internet options**.
2. Click the **Security** tab, and deselect the **Enable Enhanced Protected Mode** checkbox.
3. Click **OK**.

### Safari

The Agent Desktop Helper Application is enabled for Safari 10, 11, and 12 on Mac OS X 10.12 (Sierra) and higher through the use of an extension, which is packaged in the Agent Desktop Helper Application installer (*bpclient\_mac.pkg*). The installer will detect the OS X version your system is running on and will install the extension only if needed.

### How to Enable the Application for Safari

1. When prompted by the warning message, follow the instructions to download the Agent Desktop Helper Application (*bpclient\_mac.pkg*).



Agent Desktop update message

2. Follow the prompts to install "CSIM Client Plugin."



Install CSIM Client Plugin

3. After installation is complete, refresh the Agent Desktop webpage. You can now begin using it.

## **Mac Security/Privacy Settings**

If you are on a Mac, note that you may have to update your security/privacy settings, in addition to all the aforementioned steps for installing/updating the Agent Desktop Helper Application on various browsers.

In your privacy settings, allow both "Agent Desktop Helper" and "bpclient" apps to use the microphone. This step is required, no matter which web browser you are running.



Example of allowing apps to use the microphone in Security & Privacy > Privacy

## Other Updates

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 described above prompting you to upgrade. Follow the instructions of the message to update and enable the Agent Desktop Helper Application component on your computer.

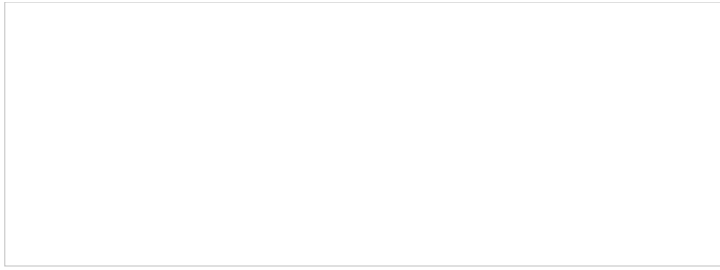
## Troubleshooting

This section describes some common issues you might experience and what you should do.

### **I just installed the Agent Desktop Helper Application but I still get the warning message in Agent Desktop.**

What this might mean:

- The installation may be incomplete. Check that the application is installed on your computer.
- You may need to refresh the page again. If the warning message still appears after that, then close your browser, reopen it, and go back to Agent Desktop.
- If your browser requires an extension, it may be disabled. Go to the extension settings and make sure the extension is **enabled** or set to **On**.



Agent Desktop Chrome Extension details

- Your browser may be blocking the application, the page, or pop-ups on the page. Try clicking the lock icon in the address bar, and make sure that all options are set to **Allow**.



Click the lock

### **A message says a network issue is disrupting your phone device.**

What this might mean:

- Restarting Agent Desktop may be required. Log out of Agent Desktop, and log in again.
- You may have lost Internet connectivity. Check your Internet connection and refresh the page.
- If you made changes to the [phone device](#), you need to log out of Agent Desktop and log in again for those changes to take effect.

### **A message says I logged in with a softphone, but the Agent Desktop Helper app is not installed or is blocked by your computer.**

What this might mean:

- If your browser requires an extension, it may be disabled. Go to the extension settings and make sure the extension is **enabled** or set to **On**.
- Your browser may be blocking the application, the page, or pop-ups on the page. Try clicking the lock icon in the address bar, and make sure that all options are set to **Allow**.





Click the lock

- Anti-virus software running on your computer might be blocking the application. 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.

### **None of this helps me.**

Contact your supervisor and/or service provider to request assistance.

## **Logging into Agent Desktop**

Bright Pattern's Agent Desktop application can be launched from any supported web browser, including Chrome, Firefox, Safari, and Internet Explorer.

To log in to Agent Desktop, you will need to know the following:

- The URL of your contact center (e.g., "<https://example.brightpattern.com/agentdesktop>")
- Your username (e.g., "christy.borden")
- Your password

Note that Bright Pattern offers single sign-on (SSO) functionality for the contact center platform. SSO enables access to both Bright Pattern's Agent Desktop and Wallboard applications when you log in to either one of these applications. For example, if you log in to Agent Desktop and then navigate to Wallboard, you will find yourself already logged in to that application as well.

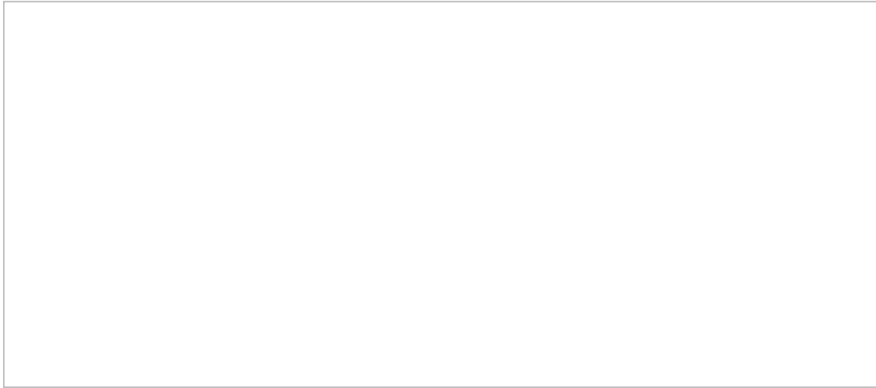
### **Step 1: Enter login credentials**

1. Open your web browser and type in your contact center's URL:

**`https://<yourcontactcenter>.brightpattern.com/agentdesktop`**

For example: <https://example.brightpattern.com/agentdesktop>

2. In the **Username** and **Password** fields of the dialog box, enter the username and password provided to you by your system administrator. Do not change other fields of the dialog box unless instructed to do so by your system administrator.
3. Click the **Log in** button.



Enter username and password to log in to Agent Desktop.

## Step 2: Confirm permissions and change password (if needed)

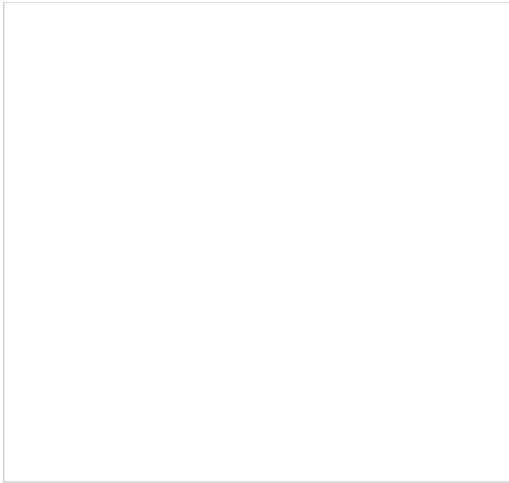
If this is your first time logging in to Agent Desktop, you may be asked to confirm your permission to show notifications from this web page. Confirm your permission to display notifications.

If you forgot your password, you may request it by clicking the **Forgot password** link. Password recovery instruction will be sent to you by email. Note that in order to receive those instructions, your email address must be associated with your user account in the Bright Pattern Contact Center Administrator system. If in doubt, contact your administrator to have your password reset manually.

Once logged in, you can change your password via the settings menu in the top right corner of your application screen.

### How to change your password

1. Click your **User Profile** photo icon . Note: If you have not uploaded a photo to your user profile, click on the **Settings** icon  instead.
2. Select the **Change Password** option.

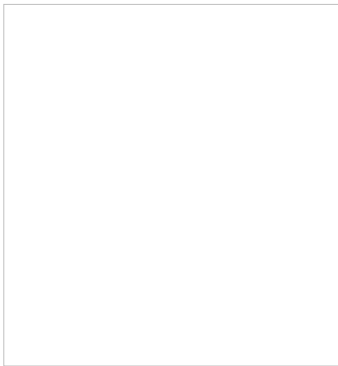


Click the Settings icon to change your password.

Depending on your contact center security policies, you may also be required to change your password upon initial login and/or at regular time intervals (e.g., every 90 days).

### Step 3: Navigate the user interface

Successful logging into the Agent Desktop application marks the beginning of your working session. Your current status will be displayed in the upper-left corner of the application screen.




Agent status is set in the upper left-hand corner of Agent Desktop.

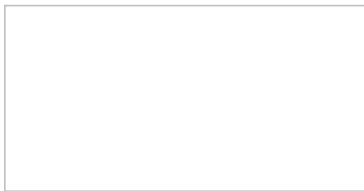
If you are an agent, depending on your contact center practices, you may be assigned either the *Not Ready* or *Ready* state upon login. If the *Not Ready* state is assigned, you will not receive any service calls until you manually change your state to *Ready*. If the *Ready* state is assigned, you may receive an interaction immediately upon login. See [How to Interpret Your Current State Information](#) for more information about the agent states and how to change them.

If you are not an agent, you will be assigned the status *Available*  immediately upon login. This status indicates to your colleagues your availability to communicate. If you prefer not to be disturbed by incoming calls or instant messages, consider manually changing your status to *Not Ready*  by clicking the drop-down menu icon below the current status indicator. For more information about availability indicators, see section [How to Use the Directory](#).

Some of the functions described in this guide may not be available to you. This usually means that either the corresponding capabilities are disabled in your contact center, or you do not have the permissions to use the function in question. If you believe that you need access to such functions in order to perform your tasks, contact your system administrator.

## How to Terminate Your Working Session

1. To terminate your working session click the **Logout icon**  in the upper right corner of the desktop.
2. A dialog window will appear asking you to confirm the intention to terminate your working session.



Logout confirmation dialog

3. Click **OK** to confirm.
- If you have an active call or chat on your desktop, the system will let you finish its processing before logging you out.
  - If you have any unfinished emails on your desktop, you will be allowed to log out immediately. The unfinished emails will be saved as drafts in your personal queue, and you will be able to finish their processing the next time you log in.

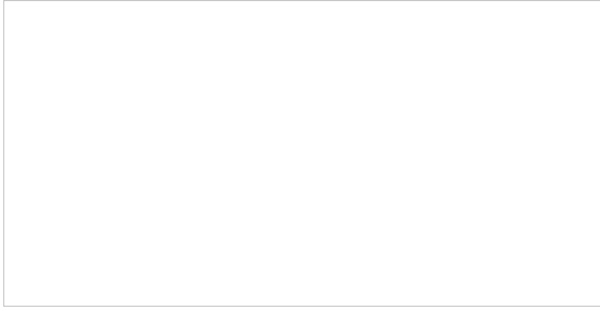
After you have logged out, the browser tab will show the [Login dialog](#). You can leave the browser tab open if you plan to log back in shortly. Otherwise you can close the browser tab.

**Note:** If, instead of using the Logout command, you close the browser tab or the browser application, a standard browser dialog will appear asking you to confirm your intention to leave the web page. If you confirm, your Agent Desktop application will be closed and you will be logged out of the system automatically in about 15 seconds.

## When Your Browser Closes or Navigates Away

You may see a prompt similar to the one shown below. The exact text of the prompt will depend on the type of your browser, but the meaning will be the same.

It means that Agent Desktop will stop operation if you click the **Leave this Page** button. You will have 15 seconds to log back in to keep your active interactions before they are automatically disconnected.



Closing browser window or tab

## Selecting a Phone Device

Included in Agent Desktop settings is the ability to select the device you use to handle phone calls.

On your very first login to the system, if your system administrator has configured a default phone option, this option will be immediately available to you (i.e., you will not need to configure anything).

If the default option or the previously selected option is not available, you will be prompted to select a phone device after logging in. Your system administrator will advise you about the option you should select; the selected option will be remembered for subsequent login attempts with this browser on your computer.

Should you need to access phone device settings after your initial login, select [Phone Device](#) from your settings menu; a list of phone device options will appear.

**Note:** Because your system administrator can configure phone device options, you may not see all of the following options in your settings. Certain options may not be selectable due to web browser or operating system restrictions (i.e., they are greyed out). Additionally, the following functionalities are not supported **unless** the [BPClient plugin](#) is installed:

- Screen recording and monitoring
- The GUI popup for inbound interactions (i.e., outside of the web browser window)
- Client-side diagnostic logging (i.e., BPClient.log)
- Audio notifications through all audio devices (e.g., ringing on all devices)
- The [Simplified Desktop .NET API](#)
- Business user presence detection (i.e., system input activity tracking)
- The G.729 codec
- For Salesforce.com integrations, the CTI phone in Salesforce Classic

**Note:** In order to use screen monitoring, both users (i.e., the host of the monitoring and monitored user) should have the [BPClient plugin](#) installed.

Note that the process of selecting phone devices changed in Bright Pattern Contact Center version 5.5.0.



Phone device selection

## Phone Device Options

Choose one of the following phone devices to use in the Agent Desktop application. A high-quality headset is recommended for any device that uses audio, such as Plantronics USB DSP series. **Note:** When switching between phone devices, you must log out and log in again.

### Phone via soundcard/headset (Agent Helper Application)

This device is a softphone application working as a phone in your computer. 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.

### Secure phone via soundcard/headset (Secure Agent Helper Application)

This softphone device, while similar to the [Phone via soundcard/headset \(Agent Helper Application\)](#) option, provides encrypted audio. Additionally, 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.

### Secure phone via browser audio (Web RTC)

This option utilizes WebRTC, an open-source project that allows secure (i.e., encrypted) real-time communications in your web browser; it is available only for web browsers that support WebRTC (e.g., Internet Explorer (IE) does **not** support WebRTC). This option may be used if you experience problems with your other softphone devices. 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.

### Microsoft Teams, Direct Routing number

If your contact center uses the Microsoft Teams integration, this option allows you to use your Direct Routing number as a softphone device in Agent Desktop. When you configure this option, note that the phone number must be entered exactly as it is displayed in Microsoft Teams. The phone number may contain digits, the + symbol, and the , symbol only. **Note:** If this option is enabled, Microsoft Teams user presence is not synchronized with Agent Desktop; the Agent Desktop directory will display Agent Desktop [user presence](#).

### **Internal hardphone, my default number**

This device is a hardware phone permanently assigned to you in the system configuration.

### **Internal hardphone, number**

This device 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.

### **External phone, PSTN number**

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, the 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.

### **Dial-in and keep line open (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 the 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. The 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.

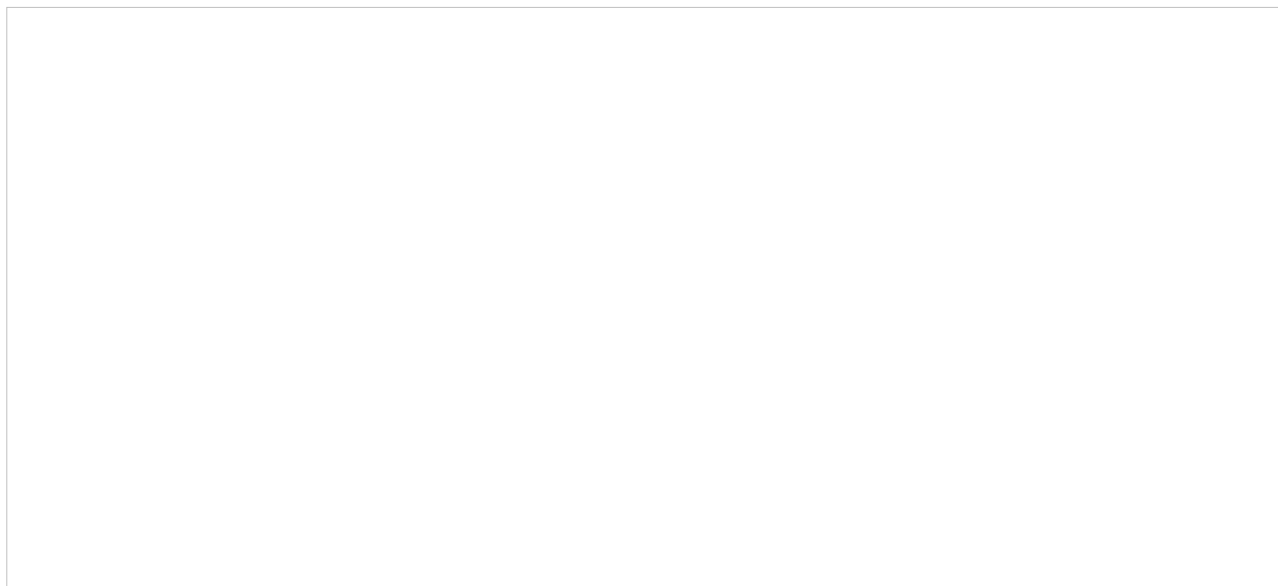
### **Login without phone**

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

# Configuring Your User Profile

Your user profile is a collection of information about you that may be relevant to the tasks assigned to you as an employee. Typically, you can enter and/or edit your profile yourself. For example, the chat nickname you select for yourself may be displayed to customers, and they will be likely to use that nickname when chatting with you.

Navigate to *Settings > User Profile* to view and edit your profile data.



User profile

Some elements of your profile may be preconfigured for you by your system administrator. Whether you can change such preconfigured profile elements, and whether you are expected to enter and subsequently update any undefined elements of your profile, depends entirely on your contact center practices. You will receive detailed instructions regarding your profile setup and maintenance from your system administrator.

The elements of your user profile are divided into the following tabs.

## User profile tab

### First name

Your first name.

### Last name

Your last name.

### Title

Your job title.

### Language



Your preferred language. This property is used for information only and does not affect the process of delivery of customer interactions to you. If, as an agent, you provide services in different languages, those languages will be configured as your skills by your system administrator elsewhere in the system.

This setting also does not affect the display language of your Agent Desktop user interface. The display language is determined by the language settings of your browser and availability of the Bright Pattern product in this locale.

## About me

You can optionally provide more information about yourself.

## Photo

If uploaded to your profile, your photo will appear in the *Contact Info Panel* of the Agent Desktop applications of other employees during your internal communications.

Depending on your contact center configuration, this photo may also be displayed to customers when they communicate with you using chat. To upload the photo, hover over the photo area and click **Change photo**. To remove the photo, hover over the photo area and click the "x" symbol in the upper right corner.

The default maximum size of uploaded photos is 10 MB; the photo will be compressed to fit the user interface elements where it is displayed. Note that the maximum size of uploaded files may be further limited by your system administrator.

## Contact Info tab

### Chat nickname

The name that will be displayed to other parties when they communicate with you via chat.

### Phone extension

The number assigned to you in the system. It is read-only.

### Work phone

Your direct *work phone* number is used for information only. For the duration of your working session, your phone number will be determined by the phone device option that you selected at the time of login.

### Mobile phone

Your *mobile phone* number is used for information only. For the duration of your working session, your phone number will be determined by the phone device option that you selected at the time of login.

### Email

Your work email address. The system will use this address for delivery of password reset instructions and your voicemail messages. It must be specified if you have permission and intention to use voicemail. For more information about voicemail delivery, see section *Listening to Voicemail Messages*.

## Location tab

### Time zone

The time zone where you normally reside. It is used for information only. For any time-dependent tasks, the system will determine your time zone based on your contact center configuration.

### Country

The country where you normally reside. This property is used for information only.

### State/Province

The state or province where you normally reside. This property is used for information only.

### City

The city where you normally reside. This property is used for information only.

## Forwarding and Voicemail tab

### Forward all calls for ext. XXXX to

Select the checkbox and enter a phone extension to enable call forwarding.

### Forward on no answer after

Specify the number of seconds to wait before forwarding a call.

### Enable voicemail (requires email address)

Select the checkbox to enable voicemail.

### Send to voicemail after

Specify the number of seconds to wait before the voicemail is emailed.

### Use the following greeting for voicemail

Select the voicemail greeting you would like to use.

Refer to the section [Configuring Your Voicemail](#) for detailed instructions on how to set up voicemail.

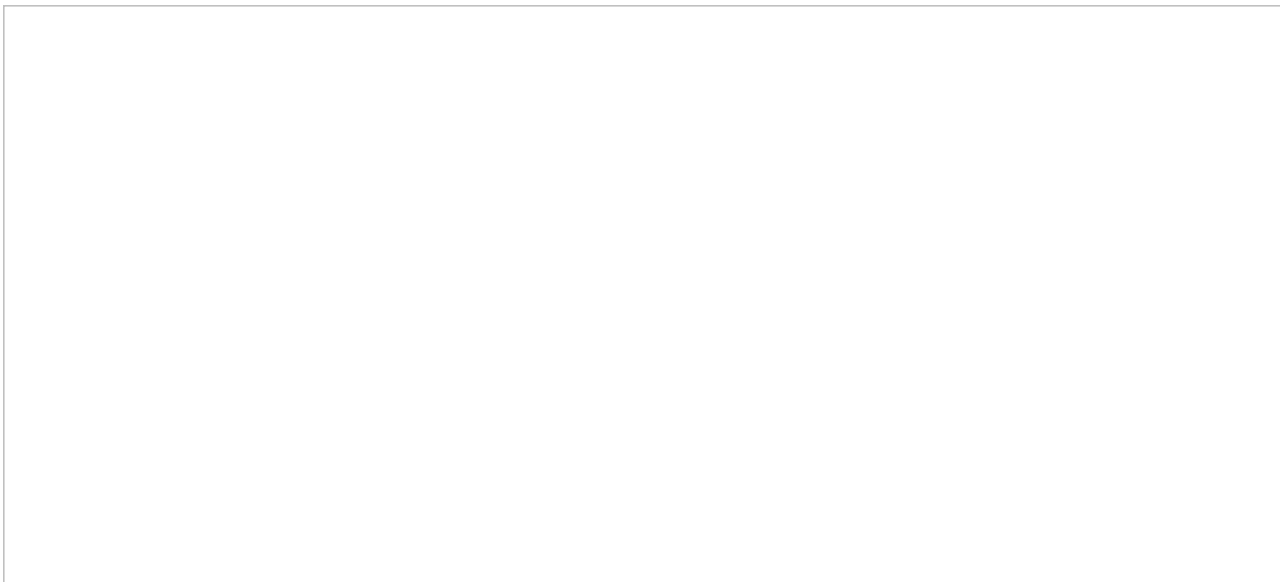
## Configuring Your Voicemail

Calls made directly to your extension number can be forwarded to your voicemail when you cannot answer them. You can record your personalized voicemail greetings and activate/deactivate your voicemail via your Agent Desktop application. Up to three different messages can be recorded and used as greetings in various situations.

Note that the system uses email for [delivery of voicemail messages](#). Before you configure your voicemail settings, make sure that you have an email address specified in *Settings > User Profile > Contact Info > Email*.

## Step 1: Navigate to the Forwarding and Voicemail tab of the user profile settings

1. Click **Settings**, select **User Profile**, and click the **Forwarding and Voicemail** tab.
2. Note that this tab contains settings related to call forwarding and voicemail functions. If you do not see any setting related to voicemail, unselect the **Forward all calls...** checkbox first.
3. Notice the fields for *Enable voicemail (requires email address)* and *Send to voicemail after* but do not make changes to them yet. You will come back to these fields after you have recorded your voicemail greetings.



Forwarding and Voicemail Settings

## Step 2: Create a personal greeting

The system provides a prerecorded generic voicemail greeting: *The person at extension [your extension number] is not available. Please leave a message after the tone.*

You can replace this generic greeting with a personal greeting recorded in your own voice. (If in doubt whether you may/should use personal greetings, ask your system administrator.)

1. Select the first radio button under the **Use the following voicemail greeting** setting. If you do not have any saved greetings, you will see << **Not set** >> beside the button.
2. Click the **edit/record** link.
3. Prepare the text of your greeting.
4. Put on your headset.

5. In the window that appears, specify the greeting title (e.g., *My everyday greeting*.)
6. 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.
7. Speak your greeting into the microphone. When you are finished, click the **Stop recording**  button.



Creating a personal voicemail greeting

### Step 3: Check your recorded greeting

To check your recorded greeting, click the playback  button. If you are not satisfied with your greeting, repeat step 1 and step 2 of this process. Otherwise, click **Ok** to confirm. You can review your greeting at any time afterward, change the title, and/or rerecord the greeting itself.

You can prepare up to three different greetings that can be used in various situations (e.g., everyday, travel, vacation). To record another greeting, select an “unused” radio button and repeat the process, starting with step 2.

### Step 4: Enable your voicemail

Once all your greetings are recorded, you can enable your voicemail.

1. Use **Send to voicemail after** to specify the no-answer timeout (i.e., the time in seconds after which an incoming call will be forwarded to voicemail when you are logged in and cannot answer it). Note that when you are logged out or if you are logged in with option [No phone](#), incoming calls will be sent to your voicemail immediately regardless of this setting.
2. If you have multiple greetings, under the **Use the following voicemail greeting** setting, select the radio button corresponding to the greeting to be used at this time.
3. Select the **Enable voicemail for ext...** checkbox. Your voicemail is now activated.

### Additional Information

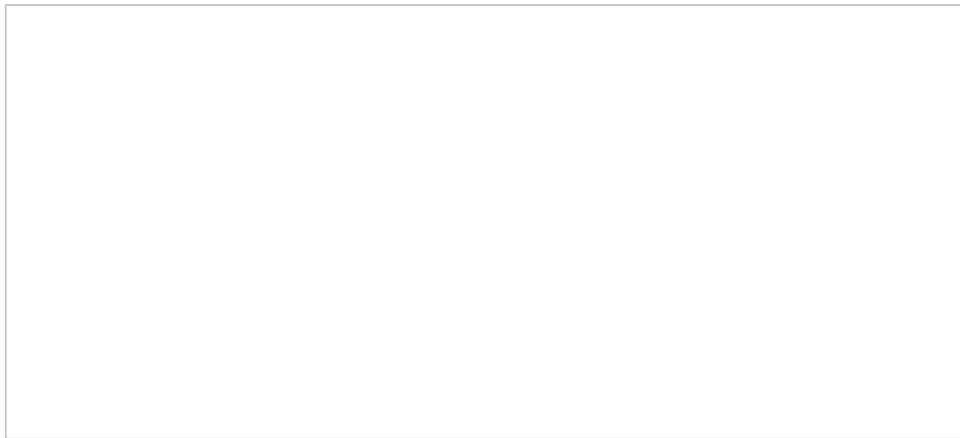
1. You can select another personal greeting as your current greeting at any time without disabling and re-enabling your voicemail.
2. Instead of recording your voicemail greetings via the Agent Desktop application, you can record them offline and store them as audio files. The process of configuring your greetings is the same, except for step 3 and step 4; instead of recording controls, you click the **Upload** button and select the desired audio file.

3. All voicemail settings can be preconfigured for you and changed at any time by your system administrator. This includes the upload of greeting audio files, the selection of the current greeting, setting the no-answer timeout, and activation and deactivation of voicemail.
4. [Call forwarding](#) settings take priority over the voicemail settings. A temporary activation of call forwarding will automatically disable the voicemail function; however, your existing voicemail configuration (the no-answer timeout and current greeting) will be preserved and will take effect as soon as call forwarding is deactivated.

## Call Forwarding

You can use the call forwarding function to redirect incoming calls that you cannot answer to another designated number where they are more likely to be answered. You can specify the forwarding number and activate/deactivate call forwarding via your Agent Desktop application at any time.

Note that call forwarding only works for direct calls, and it is always turned off for queued calls. Queued calls are always directed to the phone number that you are logged in with (even if forwarding is configured for that number).



Call Forwarding and Voicemail Settings

## Screen Properties

### Forward all calls for ext...

This checkbox indicates whether call forwarding is activated for your *phone extension*.

Note that call forwarding takes priority over voicemail. If you have had voicemail enabled (see below), activation of call forwarding will automatically disable the voicemail function.

**to**

The phone number to which incoming calls will be forwarded. The phone number must be specified if the *Forward all calls to ext...* checkbox is selected.

### **Forward on no answer after**

The time (in seconds) after which incoming calls will be forwarded to the number specified if you are logged on and do not answer.

The amount of time must be specified if the *Forward all calls to ext...* checkbox is selected. For immediate (unconditional) forwarding, set the timeout to 0.

If you are busy or logged out, incoming calls will be forwarded to the specified number immediately, regardless of this setting.

### **Enable voicemail**

Indicates whether the voicemail function is enabled for you.

Note that call forwarding takes priority over voicemail. The voicemail function cannot be enabled if the you already have call forwarding activated. If you have had voicemail enabled, a temporary activation of call forwarding will automatically disable the voicemail function; however, the voicemail configuration (the *No Answer* timeout and current greeting) will be preserved and will take effect as soon as call forwarding is deactivated.

### **Send to voicemail after**

The time in seconds after which an incoming call will be forwarded to voicemail if you are logged on and do not pick up the call. The amount of time must be specified if the *Enable voicemail* checkbox is selected.

If you are busy or logged out, incoming calls will be sent to the user's voicemail immediately, regardless of this setting.

### **Use the following greeting for voicemail**

This option lets you upload or record up to three different personal voicemail greetings and select which one should be used. For more information, see section [Configuring Your Voicemail](#) of the *Agent Guide*.

## **How to Configure and/or Activate Call Forwarding**

1. Click **Settings**, select **User Profile**, and click the **Forwarding and Voicemail** tab.
2. Use **Forward all calls for ext... to** to specify the forwarding number.
3. Use **Forward on no answer after** to specify the no-answer timeout (i.e., the time in seconds after which an incoming call will be forwarded when you are logged in and cannot answer it). When you are logged out or if you are logged in with option [No phone](#), incoming calls will be forwarded immediately regardless of this setting.
4. Select the **Forward all calls for ext...** checkbox. The forwarding function is now activated.

## Additional Information

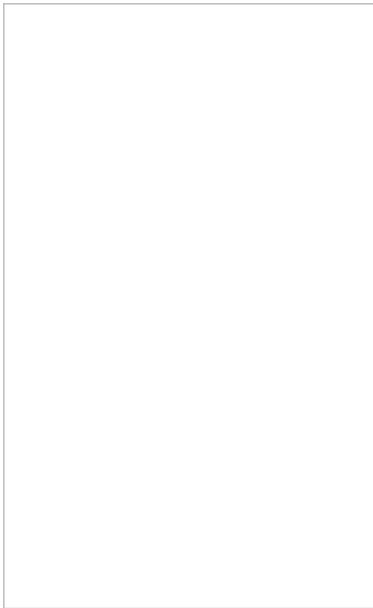
Your personal call forwarding settings will work for all [phone device options](#) except *internal phone* and *default phone*. For *internal phone* and *default phone*, forwarding settings configured for the corresponding hardphone numbers will be applied. You can check those settings with your system administrator.

All call forwarding settings can be preconfigured for you and changed at any time by your system administrator. This includes the forwarding number, the no-answer timeout, and activation and deactivation of the forwarding function.

Call forwarding settings take priority over the [voicemail settings](#). A temporary activation of call forwarding will automatically disable the voicemail function; however, your existing voicemail configuration (the no-answer timeout and current greeting) will be preserved and will take effect as soon as call forwarding is deactivated.

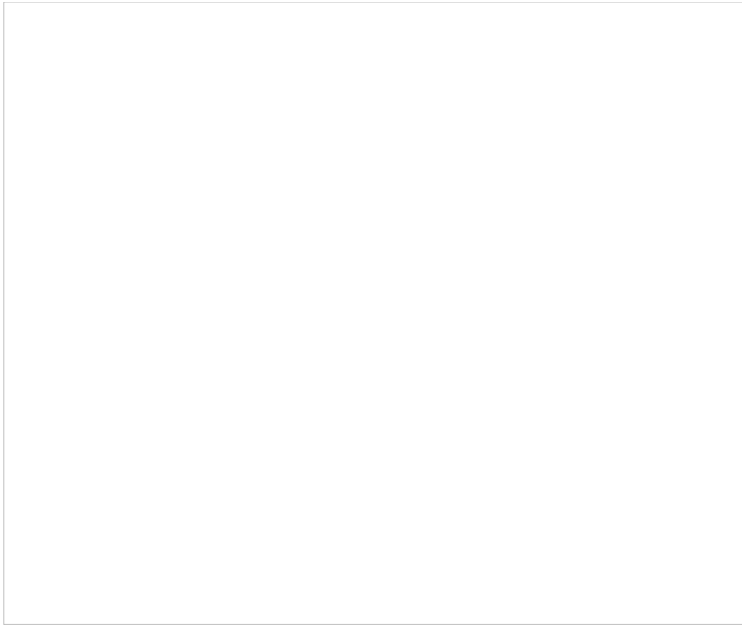
## Phone Device

The *Phone Device* setting allows you to change the phone device option. For more information, see [Selecting a Phone Device](#).



Settings > Phone Device

Note that any change made to your phone device will require you to log out then back in again before it is recognized.

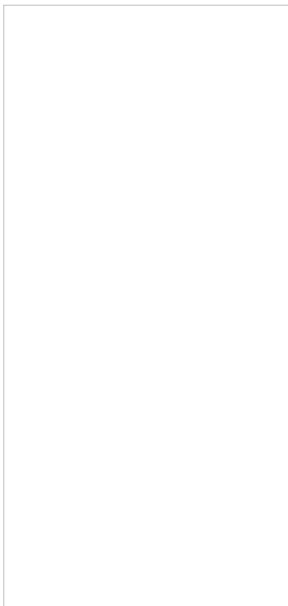


Phone Device menu options

## Ringtones and Alerts


The *Ringtones and Alerts* setting lets you customize the volume of external chat and preview record notifications and incoming calls.

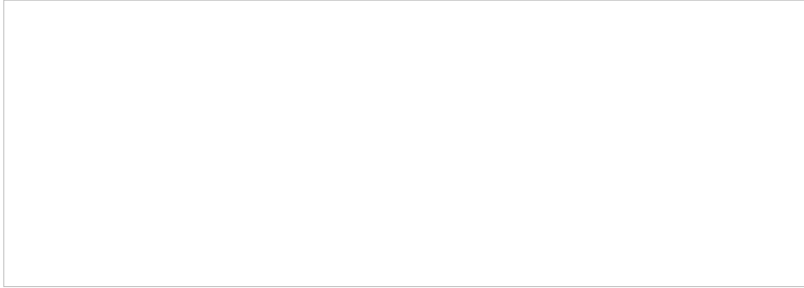
To customize your volume settings, select *Ringtones and Alerts* from the settings menu.



Settings



The Ringtone and Alert Volume pop-up window contains volume slider controls for *External chat and preview record notifications* and *Incoming calls*. To hear a preview of the volume, click the **speaker**  icon.



Customize your volume settings in Agent Desktop