

5.3 Getting Started

Bright Pattern Documentation

Generated: 7/01/2022 11:24 pm

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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.

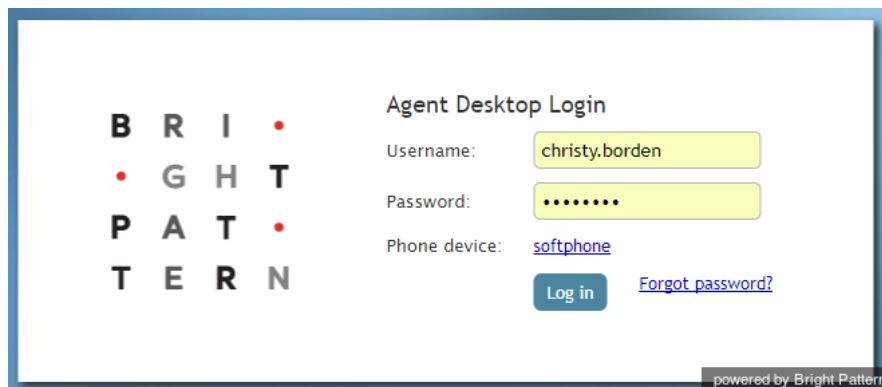
Step 1: Enter login credentials

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)

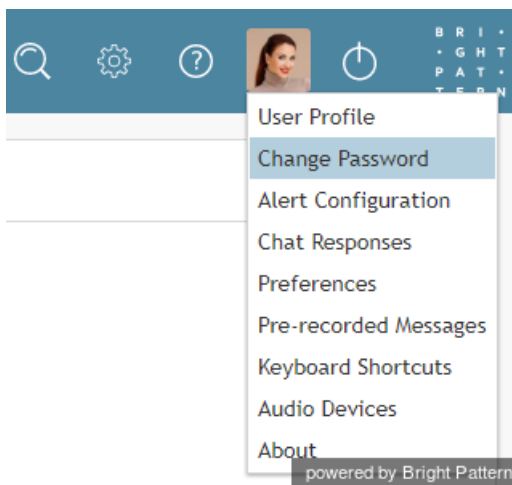
If this is your first time logging in to Agent Desktop, you may be asked to confirm your permission to show notifications from this web page. Confirm your permission to display notifications.

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.

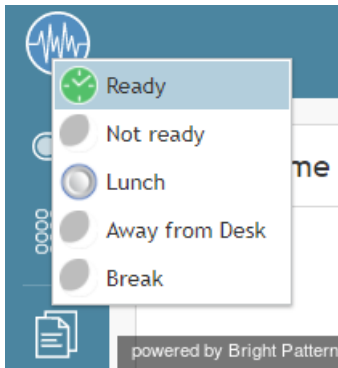


Click the Settings icon to change your password.

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.

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.

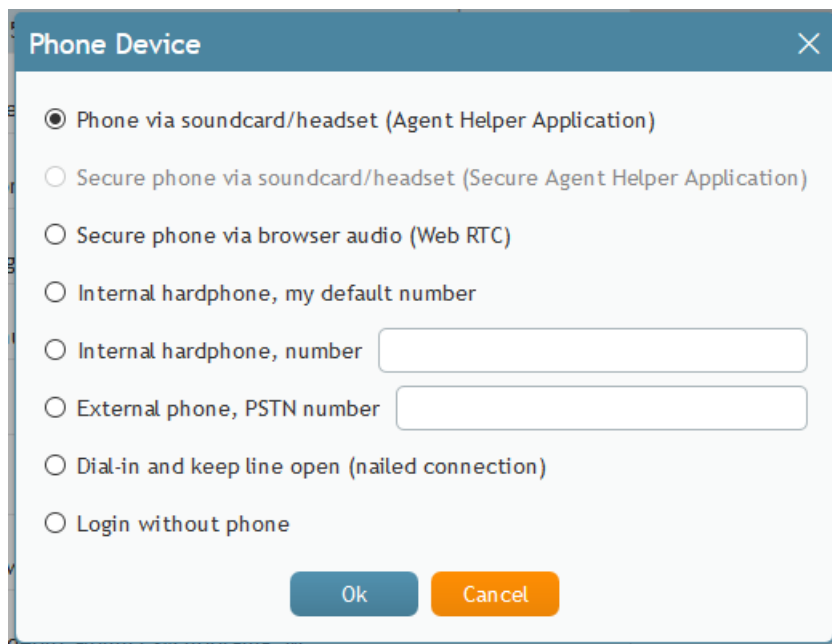
Should you need to access phone device settings after your initial login, select [Phone Device](#) from your settings menu; a list of phone device options will appear.

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., BPCClient.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 [BPCClient 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.

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).

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.

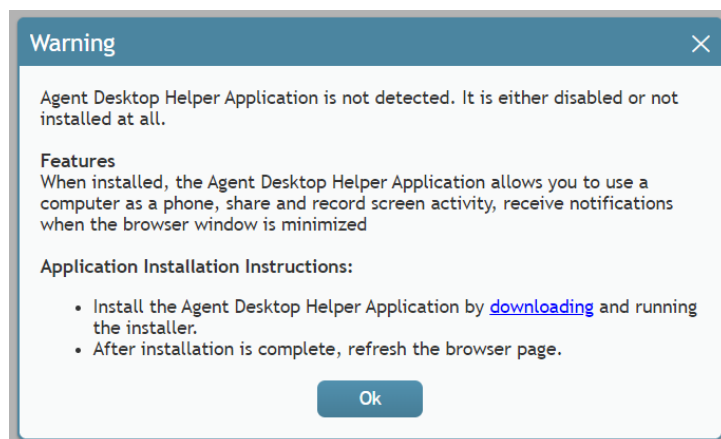
From time to time, you may be prompted by Agent Desktop to install the Agent Desktop Helper Application on your computer or enable it in your web browser. This article will guide you through the process of downloading, installing, and enabling the application on any browser.

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

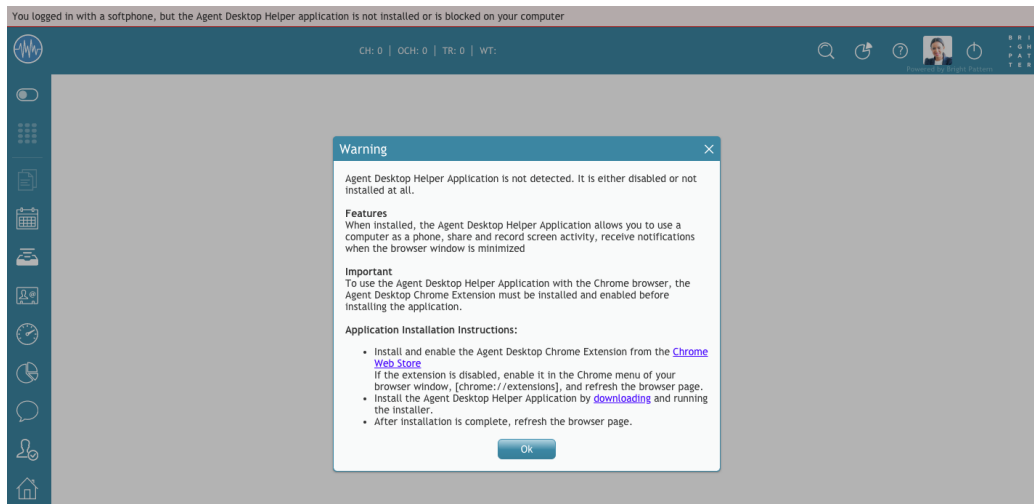
The Agent Desktop Helper Application is supported on Google Chrome, Mozilla Firefox, Safari, and Microsoft Internet Explorer. Some browser extensions or other settings may need to be enabled, depending on your browser.

Chrome

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

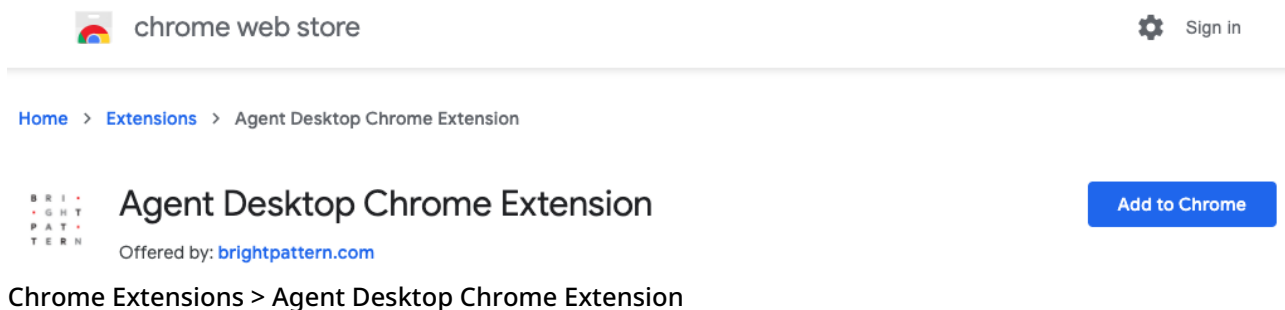
How to Enable the Extension for Chrome

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*).

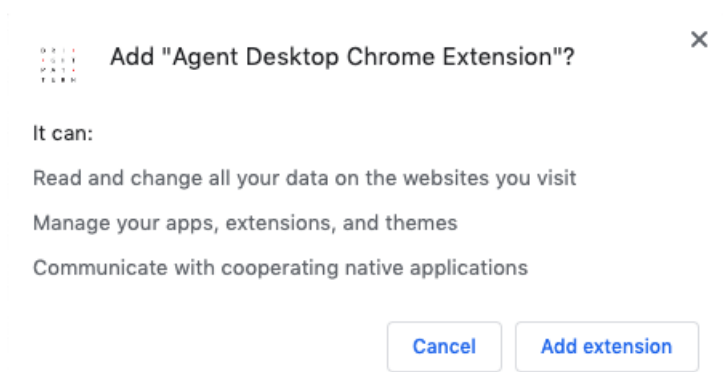


Agent Desktop update message

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

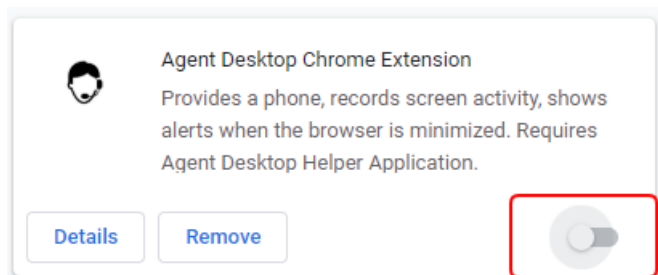


3. Then click **Add extension**.



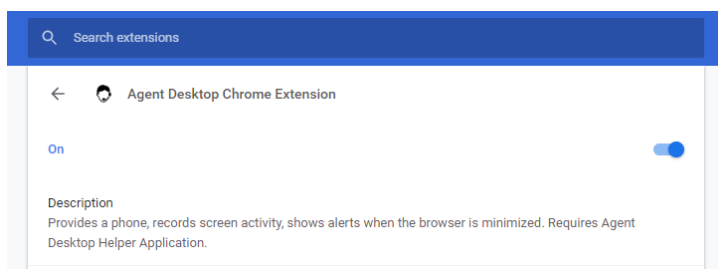
Confirm that you want to add the extension

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

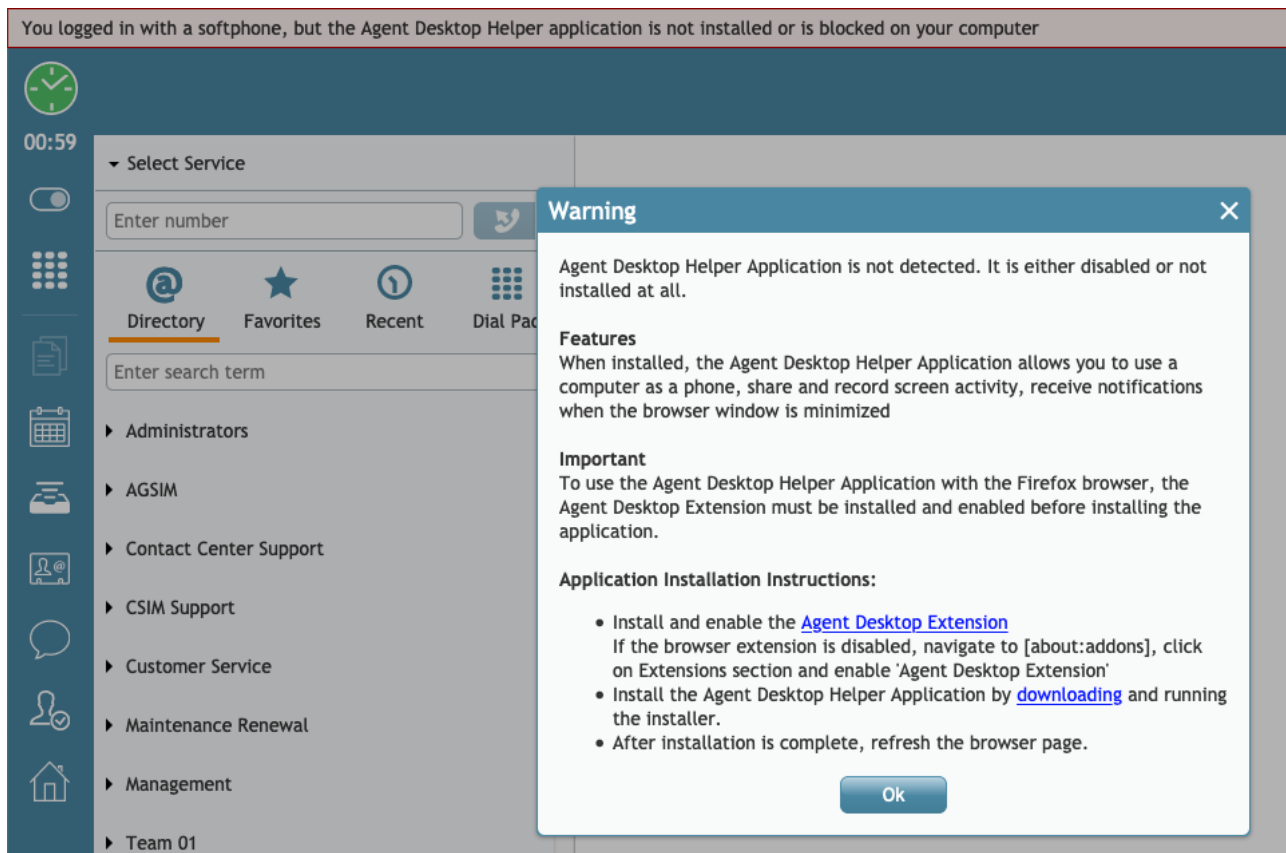
6. Go back to the Agent Desktop application and refresh the page. You can now begin using it.

Firefox

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

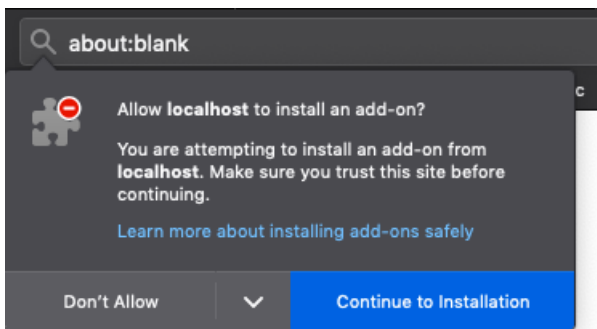
How to Enable the Extension for Firefox

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



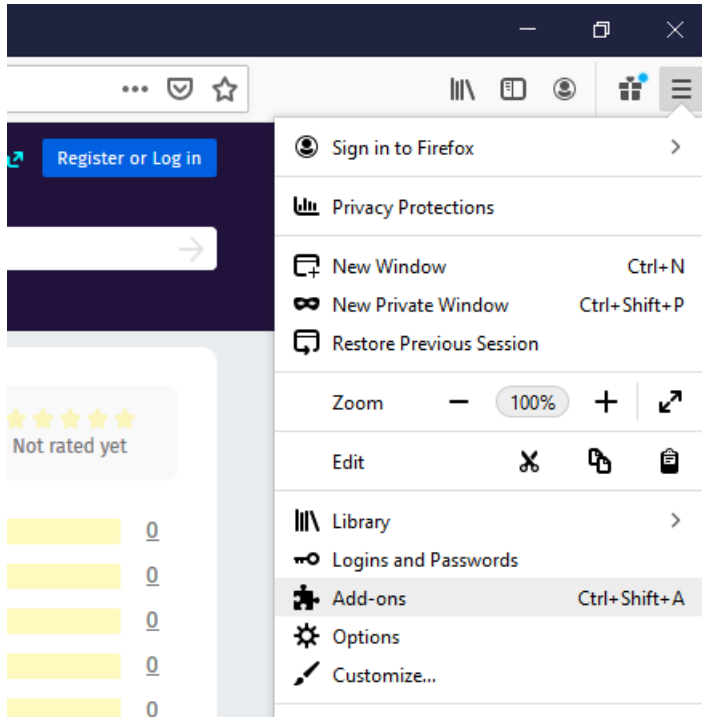
Example of an Agent Desktop warning message

2. Follow the instructions in the message to download the Agent Desktop Helper Application (Mac: *bpclient_mac.pkg*, Windows: *BPClientSetup.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**.



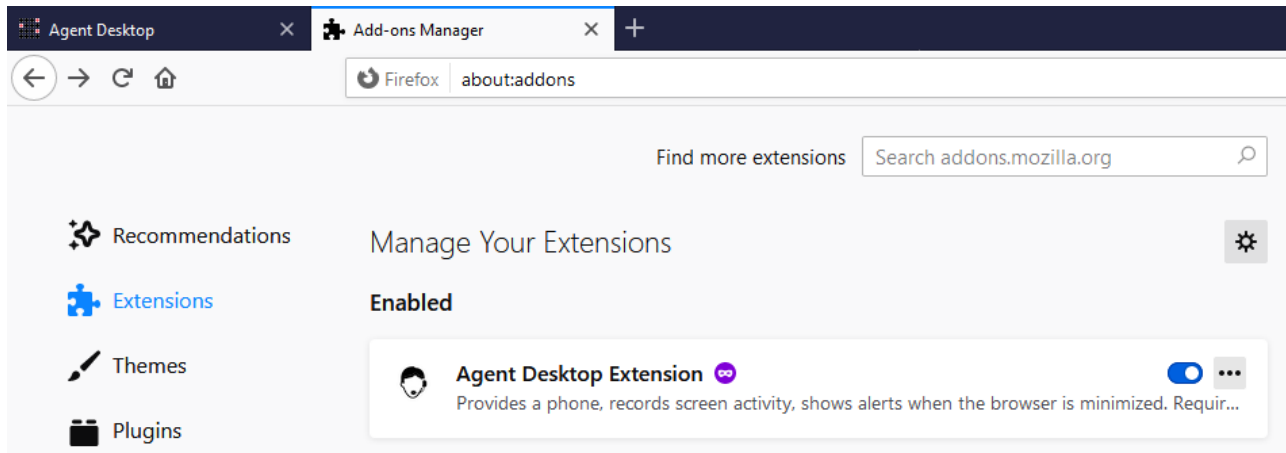
Example dialog for Firefox add-on installation

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 grey, 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

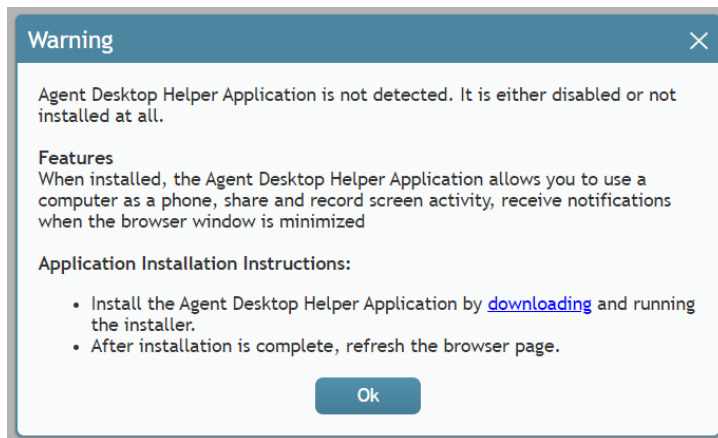
1. In the browser application, click **Tools** (Alt+X) and select **Internet options**.
2. Click the **Security** tab, and deselect the **Enable Enhanced Protected Mode** checkbox.
3. Click **OK**.

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.

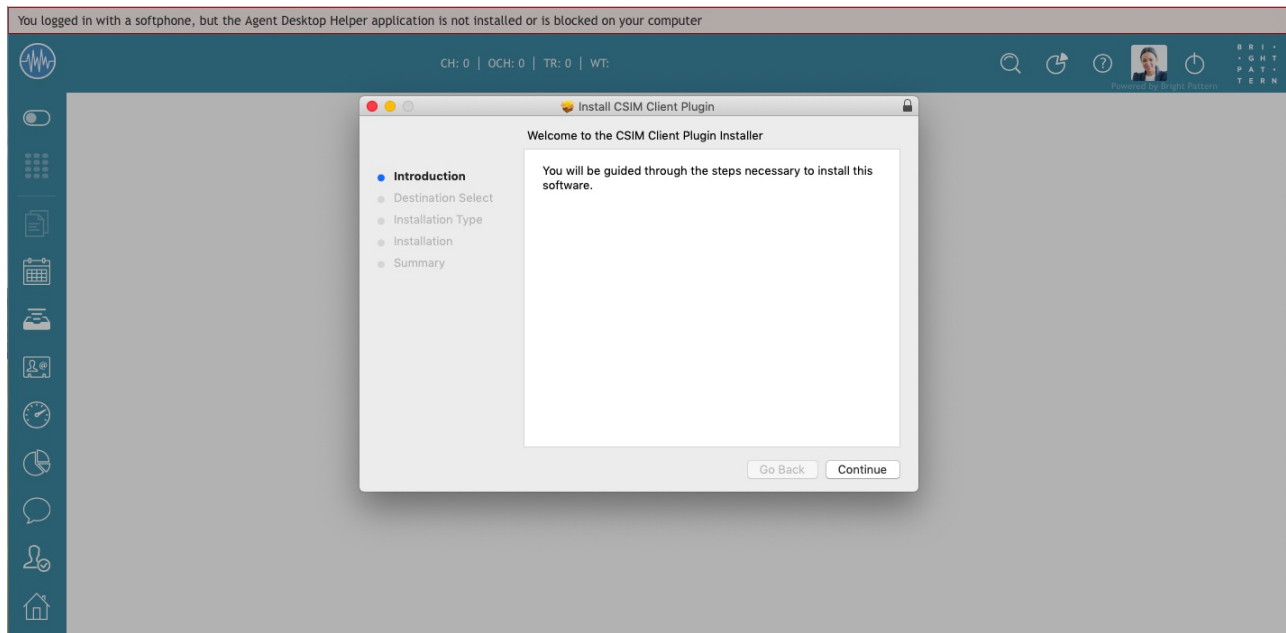
How to Enable the Application for Safari

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."



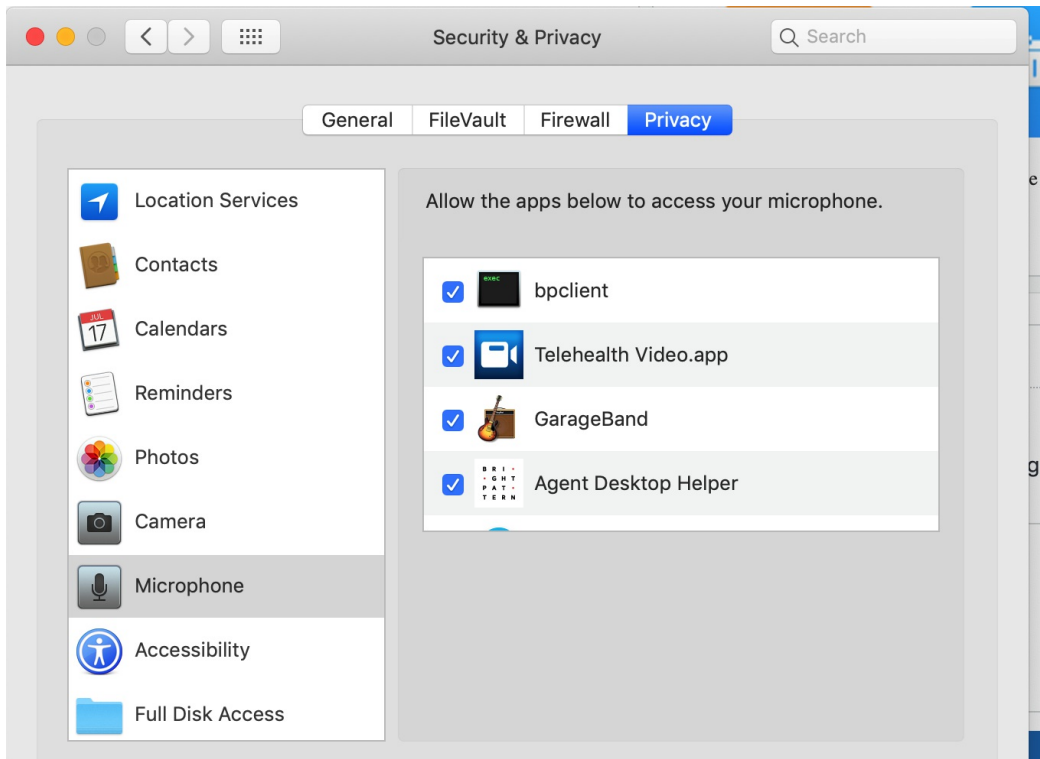
Install CSIM Client Plugin

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.

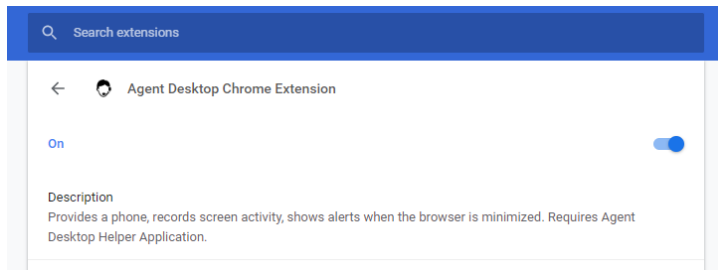
Troubleshooting

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.

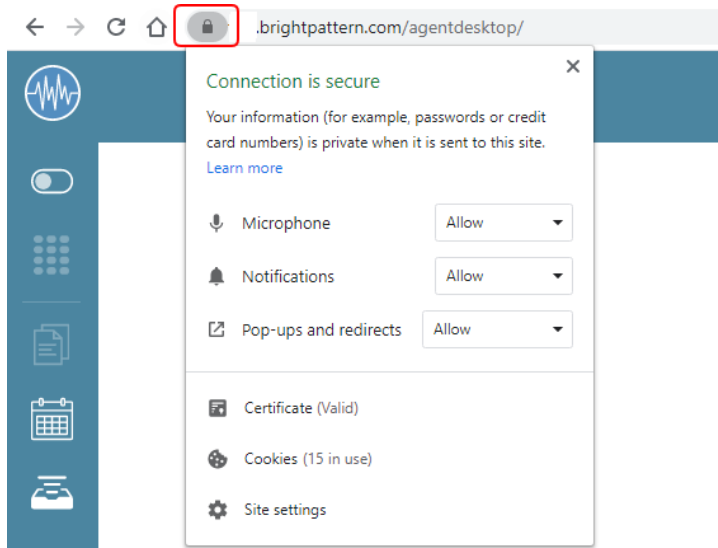
What this might mean:

- 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.

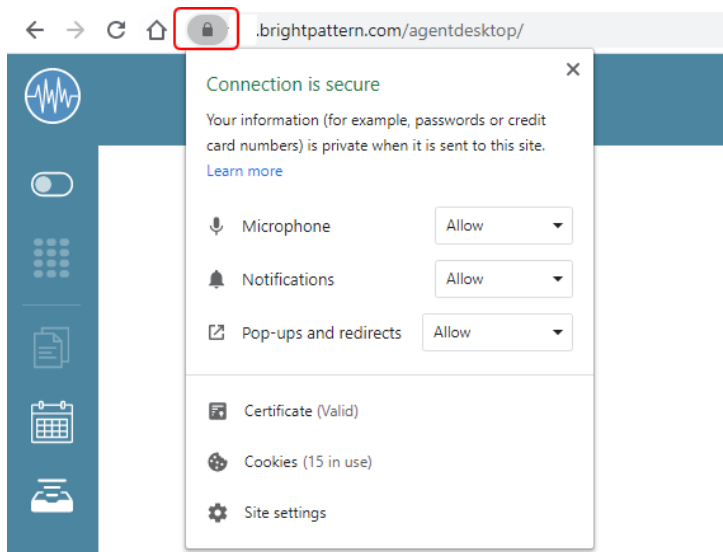
What this might mean:

- 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.

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

Contact Info

Location

Forwarding and Voicemail

First name: Lola Last name: Maddox

Title: Customer Success Representative

Language: English - United States

About me:

Ok Cancel

powered by Bright Pattern

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.

The screenshot shows a web-based configuration window titled "Forwarding and Voicemail". On the left is a sidebar with menu items: "User Profile", "Contact Info", "Location", and "Forwarding and Voicemail" (which is highlighted). The main content area includes the following settings:

- Forward all calls for ext. 1004 to: [8888]
- Forward on no answer after: [] sec
- Enable voicemail (requires email address):
- Send to voicemail after: [10] sec
- Use the following greeting for voicemail:
 - << Not set >> [edit/record](#)
 - << Not set >>
 - << Not set >>




At the bottom right, there are "Ok" and "Cancel" buttons, and a small logo that says "powered by Bright Pattern".

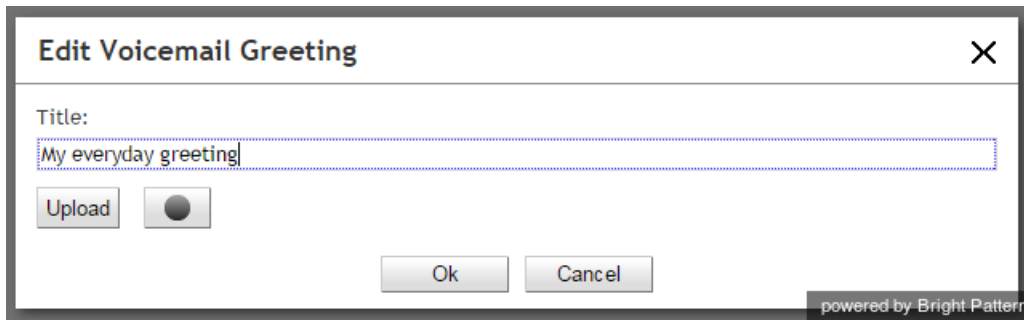
Forwarding and Voicemail Settings

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.