



5.3 Chat Center Tutorials

Bright Pattern Documentation

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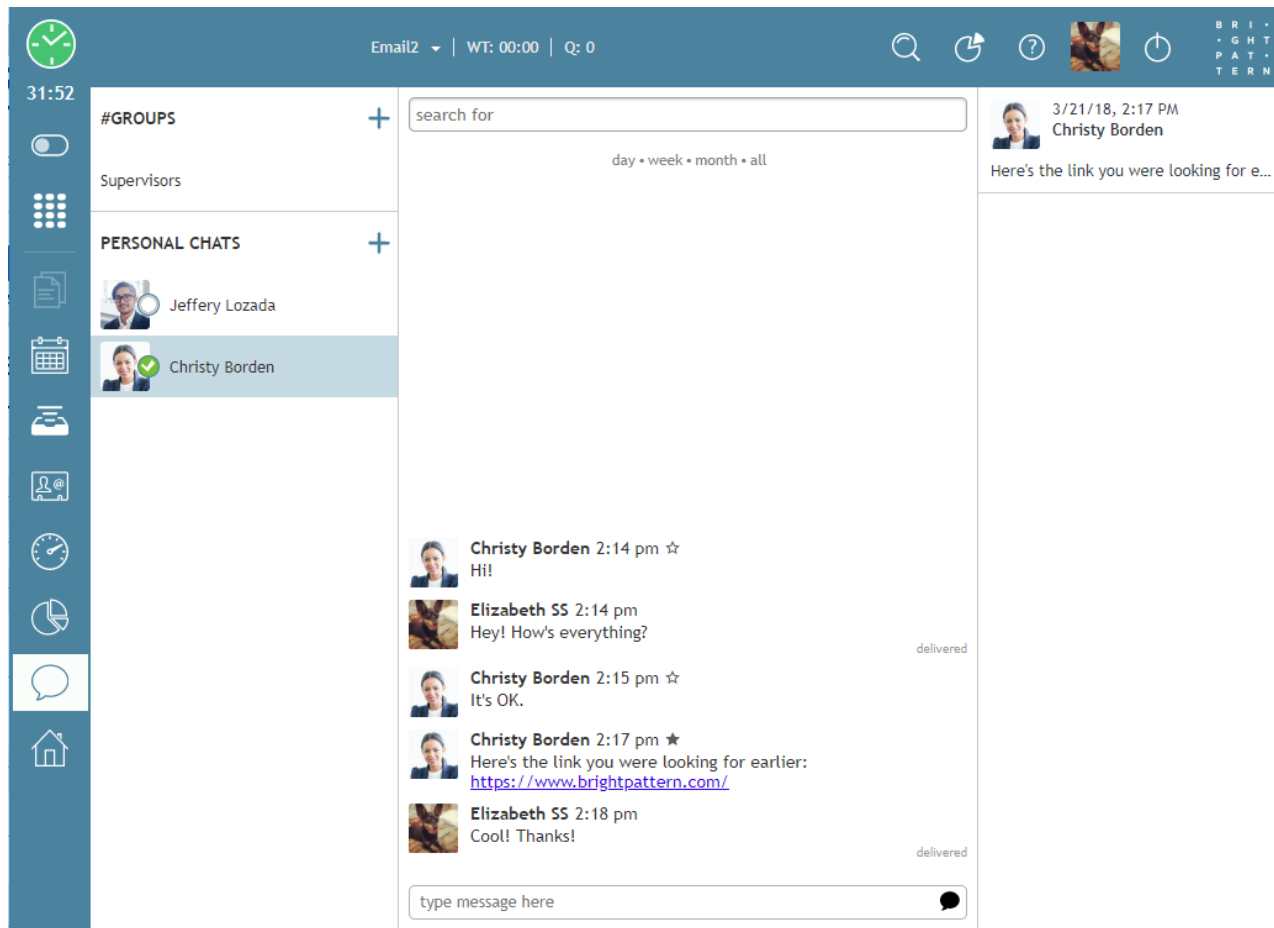
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How to Use Personal Chat

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





Overview of Personal Chat

How to Send Personal Chat Messages

There are two ways to send Personal Chat messages:

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

From the *Directory*

- Select the desired contact from the [Directory](#).
- Clicking the **Chat**  icon next to the contact's name in the *Directory* will launch a new chat.
- To send a message, type in the *Text Input Field* area, then press the **Enter** key or click on the **Send the message**  icon.

44:59 Elizabeth SS CH: 0 | OCH: 0 | TR: 0.0 | WT: 00:00

Elizabeth SS

day • week • month • all

Christy Borden 2:17 pm ★
Here's the link you were looking for earlier:
<https://www.brightpattern.com/>

Elizabeth SS 2:18 pm ☆
Cool! Thanks!

Today

Elizabeth SS 9:23 am ☆
Good morning, my friend! How's it going?

Christy Borden 9:23 am
It's going. How about you?

Elizabeth SS 9:24 am ☆
Not bad, if I do say so myself. :)

Christy Borden 9:24 am
Cool! What's up for today?

Elizabeth SS 9:25 am ☆
The weekly meeting is 13:30 - 14:30 today.
Make sure to bring your notes this time. :)

Christy Borden 9:25 am
I will! LOL

Elizabeth SS 9:26 am ☆
Haha

Calendar: Christy Borden


Reassign by range...

March 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22 1:30p Weekl	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

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

From the *Chat Center*

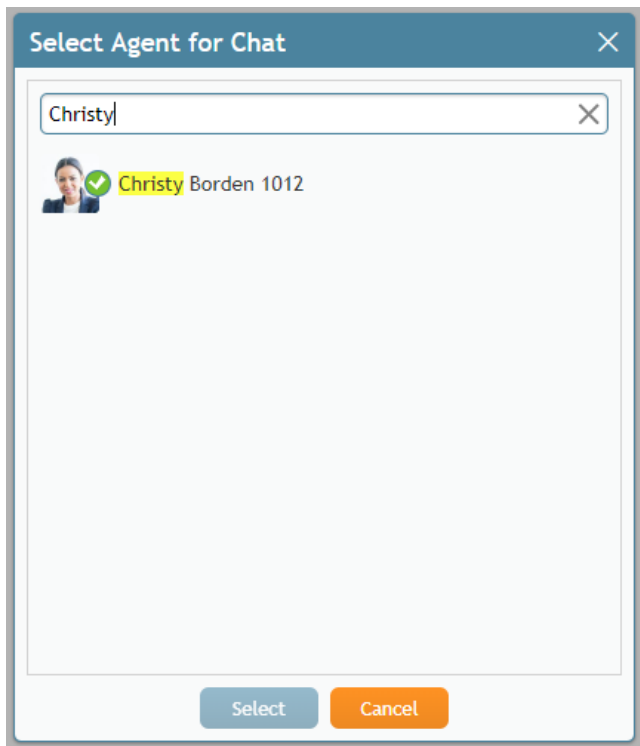
- To access the *Chat Center*, click on the  icon.
- Next, go to the *Personal Chats* section and click on the + icon to bring up the *Directory*.

PERSONAL CHATS +


Select from Directory

Choose *Select from Directory*

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




Select the user to initiate chat

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




Additional Features of Personal Chat

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

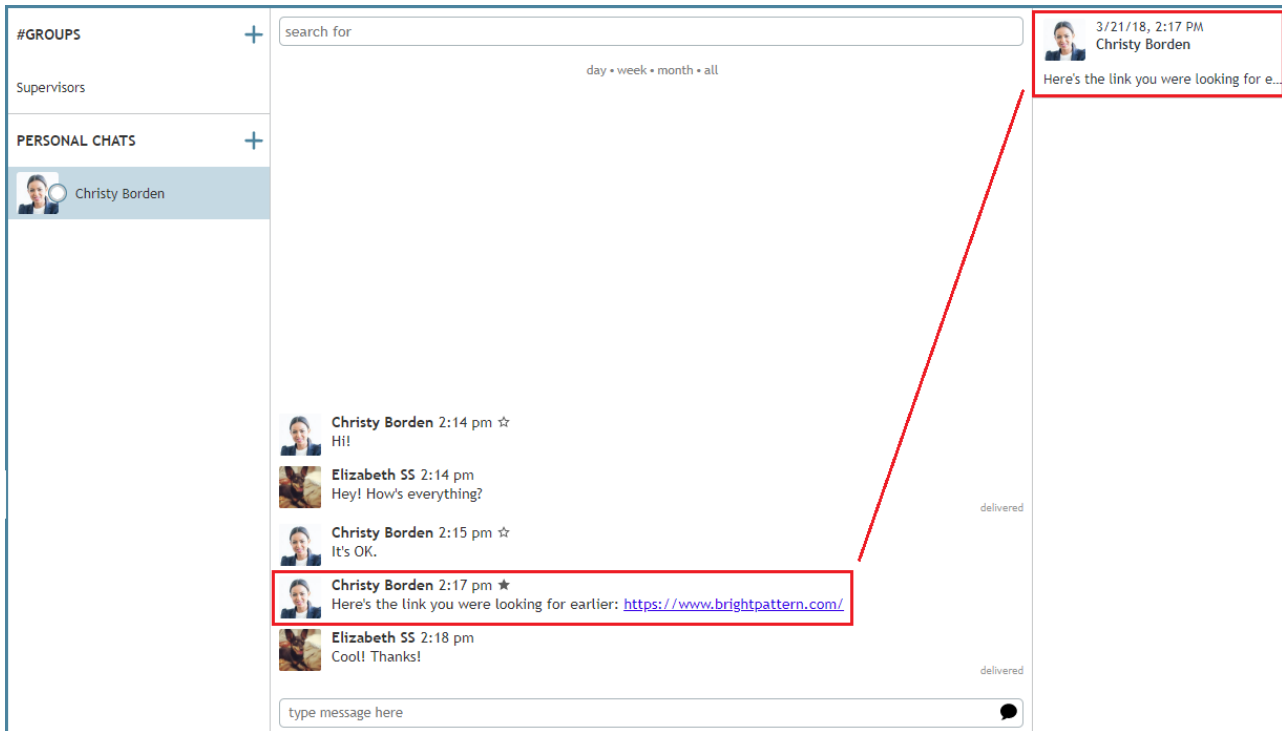
Starring a Message

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

To star a message, follow these steps:

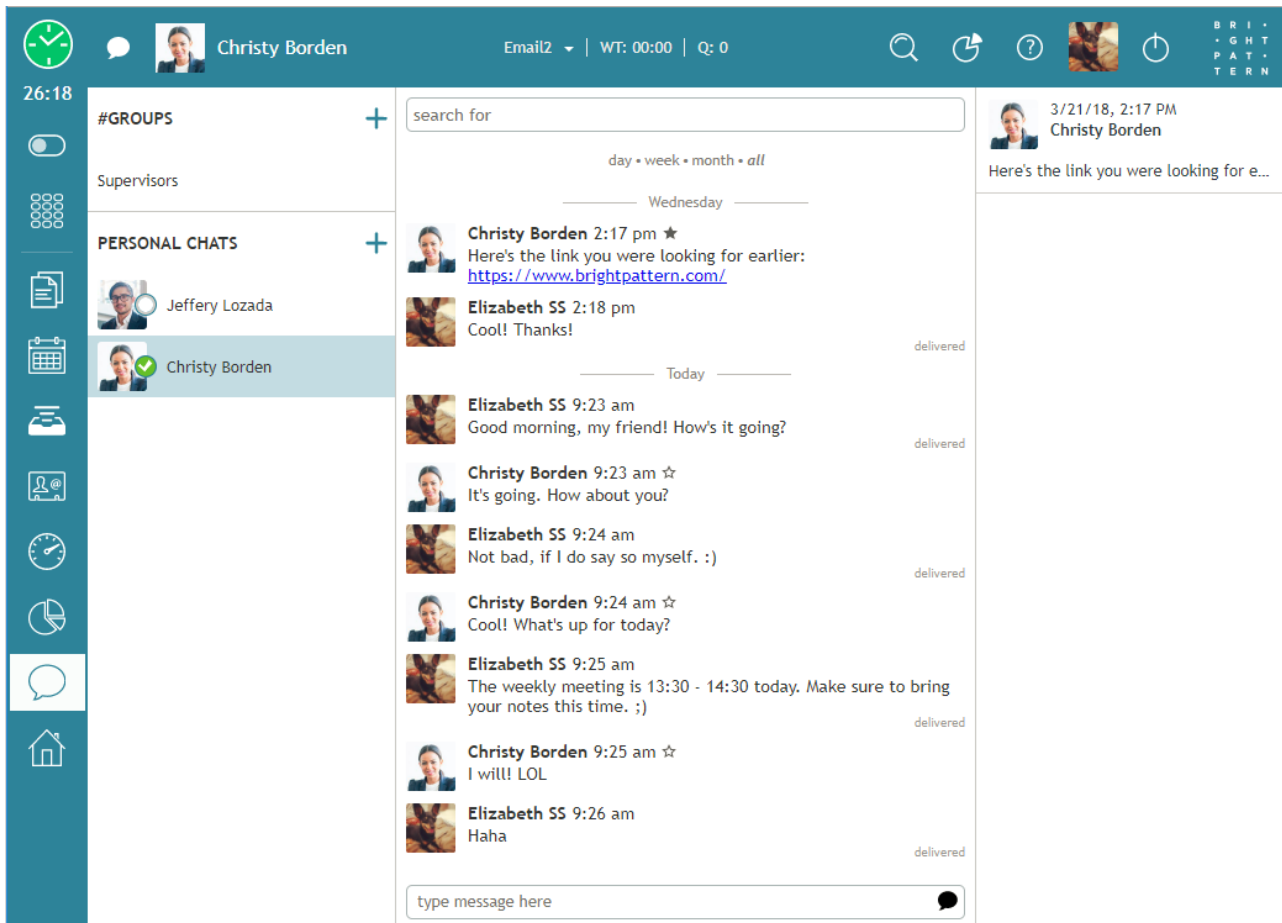
1. Find the message.
2. Click the **Star** .
3. The star will have changed from a light color  to a dark color .

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



Example of a starred message

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

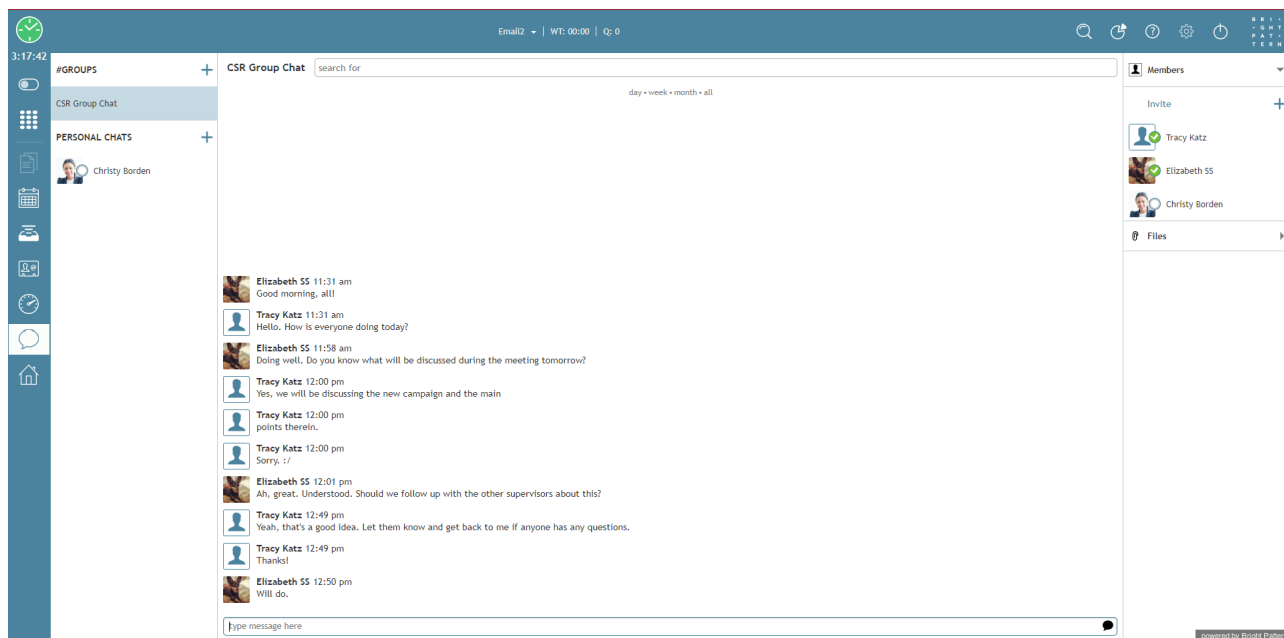


Starred messages act as bookmarks within a Personal Chat

How to Use Group Chat


The Group Chat feature allows agents, supervisors, and other users to chat within your contact center. Many features of Group Chat are similar to Internal Chat and Service Chat; however, Group Chat is not for chatting with individual users or customers.

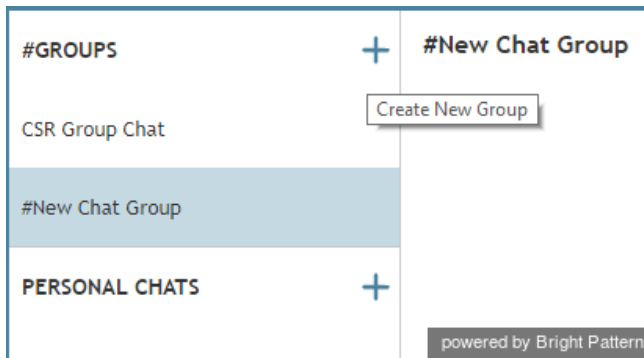
For more information on Internal Chat, see [How to Use Internal Chat](#). For more information on Service Chat, see sections about [Handling Service Chats](#).



Overview of Group Chat

How to Access Group Chat

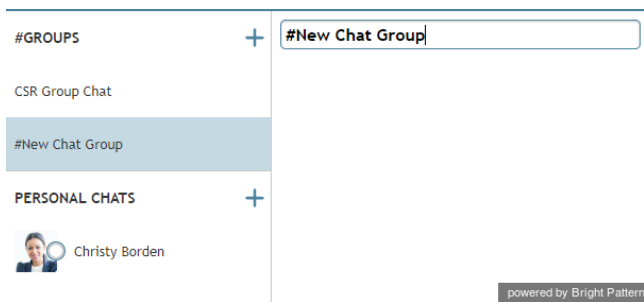
Group Chat is accessible through the *Chat Center*. To access the *Chat Center*, click on the  icon. To initiate a Group Chat, click **Create New Group** (this is the + icon to the right of *#Groups*).



How to create a new Group Chat

Renaming a Group Chat

The default Group Chat channel name is *#New Chat Group*. To rename a Group Chat, click in the *#New Chat Group* field and type the new name. When you are finished, click anywhere outside of the field and the new name will save.



Edit the name of a Group Chat to stay organized

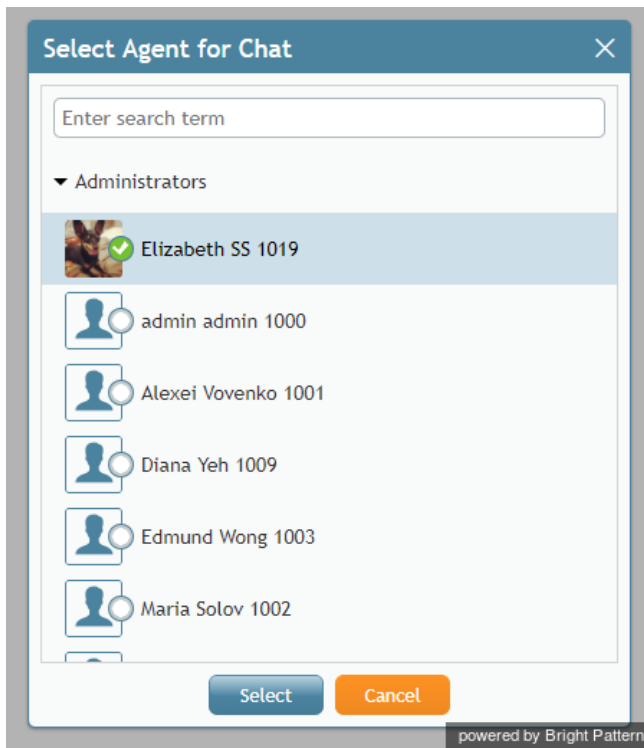
Managing Group Chat Members

When you have created a Group Chat, you have the ability to add and remove members. Furthermore, any member in a Group Chat can *Invite* additional members.

Adding Group Chat Members

To add members to the new chat group, follow these steps:

1. Click the + icon in the *Invite* area of the Chat Center.
2. The pop-up directory *Select Agent for Chat* will appear. Use the search bar at the top of the directory or scroll down the list to find a user.
3. Click on the user you would like to add to your Group Chat and then click **Select**. Members may be added one at a time.

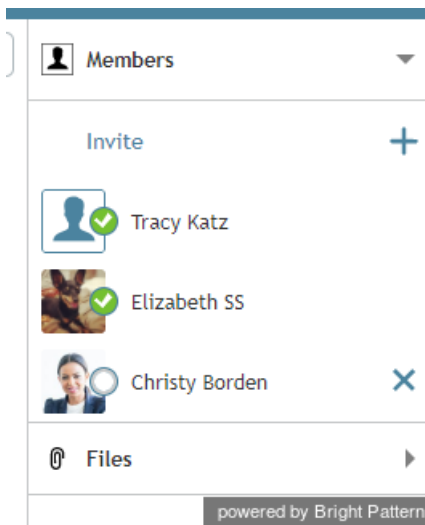


Selected members will be highlighted

Removing Group Chat Members

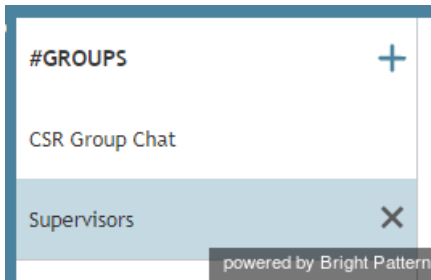
While anyone in a Group Chat can invite additional users, the creator of the group can remove any or all specific members. Additionally, any user can remove themselves from a chat.

To remove a member from the chat Group, click the X icon to the right of their name.



How to remove Group Chat members


To remove yourself from a group, click the X to the right of any Group Chat.

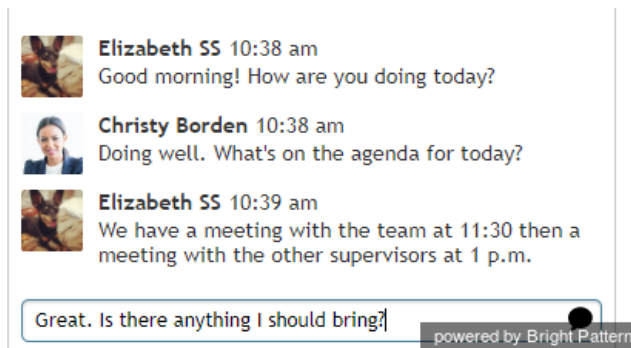


How to remove yourself from a Group Chat

If you removed yourself from a group you did not create, the creator can *Invite* you again and all previous messages can be viewed. If you are the creator of a Group Chat and delete it, the group will be removed for all users.

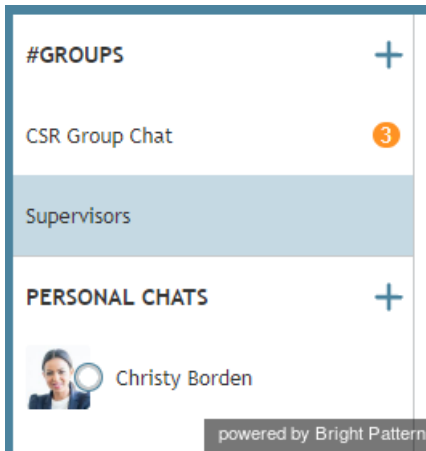
Messaging and Notifications

Once you have created or are added to a Group Chat, you can send and receive messages regardless of your state (e.g. *Ready*, *Not Ready*, *Supervising*, etc.). To send a message, type in the *Text Input Area* area, then press the **Enter** key or click on the **Send the message**  icon.



Example of a Group Chat

If you have been active in another chat or even logged out of Agent Desktop, when you return you will see the number of missed messages next to a given group.



Numeric display of missed messages from the "CSR Group Chat"

Adding Attachments in Group Chat

This feature is reserved for future use.