



5.3 Agent Tutorials

Bright Pattern Documentation

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Calendar

- [Overview](#)
- [How to Edit Existing Events](#)
- [How to Open the Calendar](#)
- [How to Schedule an Event](#)

Calls Tutorials

These tutorials provide step-by-step instructions for everything related voice calls: dialing, accepting, transferring, muting, and flagging.

Articles

Basic Information

- [Call Controls](#)

Accepting/Rejecting Calls

- [How to Answer an Incoming Call](#)
- [How to Reject an Incoming Call](#)

After Call Work and Dispositions

- [Dispositions and Notes](#)
- [How to Wrap Up After Call Work](#)

Callback Reservation

- [About Callback Reservation](#)

Conferences

- [How to Host a Conference](#)
- [How to Participate in a Conference](#)

Consultations and Transfers

- [How to Make Consultations and Transfers](#)

Directory

- [How to Use the Directory](#)

Favorites

- [How to Use Favorite Contacts](#)

Follow-ups

- [How to Schedule a Follow-up Activity](#)

Mute and Hold

- [How to Hold and Retrieve a Call](#)
- [How to Mute a Call](#)
- [How to Release a Call](#)

Placing Calls

- [How to Make an Internal Call](#)
- [How to Make an Outbound Call](#)
- [How to Speed Dial Through External IVRs](#)

Recording and Voice

- [How to Connect a Voice Application to Your Call](#)
- [How to Record a Call](#)
- [How to Stop Call Recording](#)
- [How to Use Prerecorded Messages](#)
- [Voice Signatures](#)

Redialing

- [How to Redial a Previously Dialed Number](#)

Remote Assistance

- [Overview: Remote Assistance During Calls](#)
- [How to Start Remote Assistance During a Phone Call](#)
- [How to Transfer a Call with an Active Remote Assistance Session](#)

Sending Numeric Information

- [How to Send Numeric Information](#)

Service Queue

- [How to Place a Call in a Service Queue](#)

Cases and Email

- [Overview](#)

Accepting Email

- [How to Accept an Email](#)

Creating Cases

- [How to Create New Cases](#)

Follow-ups

- [How to Use Pinned Cases to Send a Follow-up Outbound Email](#)
- [How to Use Cases to Send a Follow-up Outbound Email](#)

Fonts

- [How to Change Default Email Font](#)

Handling Email

- [How to Close an Email without Replying](#)
- [How to Change an Assigned Email Service](#)
- [How to Compose a Reply](#)
- [How to Transfer an Email](#)
- [How to Forward an Email](#)
- [How to Send a New Outbound Email](#)
- [How to Save an Email as a Draft](#)
- [How to Copy and Paste Images into Email](#)

Masking Data

- [How to Mask Sensitive Data](#)

Print

- [How to Print an Email](#)

Retrieving Email from Queue

- [How to Retrieve an Email from the Team Queue](#)
- [How to Retrieve an Email from Personal Queue](#)

Reviewing Email

- [How to Review an Incoming Email](#)

Chats

- [Overview](#)

Accepting/Rejecting Chats

- [How to Accept a Chat Request](#)
- [How to Reject a Chat Request](#)

Audio/Video Chats

- [How to Have an Audio Chat](#)

- [How to Have a Video Chat](#)

Canned Responses

- [How to Create and Edit Canned Chat Responses](#)

Co-browsing

- [How to Co-browse with Surfly Integration](#)
- [How to Co-browse](#)

Creating Cases

- [How to Create a Case from a Chat Session](#)

Flagging Chats

- [How to Flag an Interaction](#)

Follow-ups

- [How to Schedule a Follow-Up Activity from a Chat Session](#)

Forms

- [How to Send a Secure Form](#)

Multiple Chats

- [Handling Multiple Chat Sessions](#)

Remote Assistance

- [Overview: Remote Assistance in Chats](#)
- [How to Initiate Remote Assistance During a Chat/SMS/Messaging Session](#)
- [How to Transfer a Remote Assistance Session to a Different Agent During a Chat Session](#)

Sending Chat Messages

- [Chat Messages](#)
- [How to Send and Receive Pictures and Documents](#)

Terminating the Chat

- [How to End a Chat Session](#)

Transfers

- [How to Transfer Your Chat Session](#)

Contacts

- [Overview](#)
- [How to Create a New Contact](#)

- [How to Edit an Existing Contact](#)

Knowledge Base

- [Overview](#)
- [How to Contribute Content to the Knowledge Base](#)
- [How to Use a Knowledge Base Article](#)

Outbound Campaigns

- [Overview](#)
- [How to Reject a Calling Record](#)
- [How to Review a Calling Record](#)
- [How to Reschedule a Call Attempt](#)

Search

- [Overview](#)
- [How to Conduct Advanced Searches](#)
- [Using URL Variations to Access Case and Contact Information](#)

States

- [Overview](#)
- [How to Interpret Your Current State Information](#)
- [How to Make Yourself Ready](#)
- [How to Make Yourself Not Ready](#)