5.3 What is Agent Desktop?

Bright Pattern Documentation

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Table of Contents

Calls Overview

On Agent Desktop, you will be handling calls that are either inbound or outbound.

Inbound voice calls can be accepted, rejected, initiated, and transferred. Outbound voice calls can be initiated in many ways, such as by clicking on a person's contact details, dialing a user in the directory, or entering a phone number in the dialpad manually.

Tutorials

Learn more about how to handle inbound and outbound calls in this guide's Tutorials section.

- Accepting/Rejecting Calls
- After Call Work and Dispositions
- Conferences
- Consultations and Transfers
- Directory
- Favorites
- Follow-ups
- Mute and Hold
- Placing Calls
- Recording and Voice
- Redialing
- Sending Numeric Information
- Service Queue

Chats Overview

If chat is enabled for your contact center, you will be chatting with either other contact center users via the Chat Center, or with customers routed to you via service chats.

The Chat Center allows you to send and receive messages to individual users or to groups in your contact center. We call these types of chat interactions *personal chats*. The chat interactions that you have with customers are called *service chats*.

Articles

The following is a list of articles in this section:

- Chat Controls

Tutorials

Learn more about chat interactions in this guide's Tutorials section.

Personal Chat Tutorials

- Group Chat
- Personal Chat

Service Chat Tutorials

- Accepting/Rejecting Chats
- Audio/Video Chats
- Canned Responses
- Co-browsing
- Creating Cases
- Flagging Chats
- Follow-ups
- Forms
- Multiple Chats
- Sending Chat Messages
- Terminate the Chat
- Transfers

Mobile Interactions Overview

Customers have increasingly been able to contact businesses via applications that they download to their smartphones. Such applications were originally designed for self-service and web-form inquiries. More recently, however, web and mobile applications have begun to support live interactions, including chat, voice, and video calling. The picture below shows an example of a customer communicating with an insurance agent via a mobile chat application.

Thus, depending on your service configuration, you may be expected to handle interactions that customers initiate via such smartphone applications. Generally speaking, you handle mobile voice and chat interactions in the same way that you handle regular service calls and service chats. A few differences that you may need to be aware of while handling mobile interactions are discussed in the sections that follow.

Articles

The following is a list of articles in this section:

- Mobile Chat
- Mobile Voice
- Mobile Video

Mobile chat application example

Cases and Email Overview

In addition to calls and chats, you may be assigned to process customer requests made via email. Depending on your contact center practices, customer emails can either be delivered directly to your desktop (i.e., the *Push* method) or appear in the team queue from which you will be expected to retrieve them manually (i.e., the *Pull* method).

Emails can also be assigned to you by a supervisor. In this case, they will appear in your personal queue from which you will also be expected to retrieve them manually. Finally, emails can be transferred to you by other agents. Once you have accepted an incoming email or retrieved one from a queue, all subsequent steps of its processing will be the same.

In the simplest email processing scenario, a single reply to the customer's inquiry will be sufficient to finish the interaction. More complex scenarios may involve some follow-up messages from your contact center to the customer and/or additional communications from the customer.

To support these scenarios, each email is associated with a *case* and a *thread*. See the Cases, Email, and Threads section for more information about these entities.

Depending on your contact center configuration, you may be expected to handle multiple emails simultaneously. Your system administrator will advise you about the maximum number of emails that you may have active on your desktop at any given time.

Regardless of how many active emails you have, only one of them will be in focus at any given moment. The in-focus email is the one that is currently selected in the *Active Communications List*. The email working area will be entirely dedicated to the in-focus email and all of its controls will take effect for that email only. You can place another email in focus by selecting it from the *Active Communications List*. You can switch between your various active emails in this manner at any time.

Articles

The following is a list of articles in this section:

- Cases, Email, and Threads
- My Cases Interface
- Case State

Tutorials

For a list of tutorials for cases and email, see Cases and Email Tutorials.

Agent Desktop with My Queue and Team Queue in Contact Info Panel

Understanding Screen-pop

Incoming interactions can be accompanied with web pages or forms that can provide additional information about the customer and/or the requested service. In this case, as soon as a new interaction is delivered to your Agent Desktop, you will see the corresponding webpage/form in the *Context Information Area*.

If the interaction is associated with one page or form, it will occupy the entire space of the*Context Information Area*. Some types of interactions may be associated with multiple pages/forms. In this case, the pages/forms will be arranged in a multi-tab view. The most relevant page/from will be displayed in the first tab called *URL*. To see other pages/forms, click the corresponding tabs--those tabs will usually have some descriptive names. You will get detailed information about the content and purpose of each tab from your system administrator.

Note: Depending on your system configuration, web pages and forms may appear in separate browser windows or tabs instead of the *Context Information Area*.

Agent Desktop temporarily stores the forms/tabs that you used for processing of the 10 most recent interactions. Any such forms/pages will be displayed when you select the corresponding contacts from the Recent tab. (If you log out or reload your browser, those forms/pages will no longer be available.)

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Calls Overview

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- Redialing
- Sending Numeric Information
- Service Queue

Dashboard Overview

The *Dashboard* is an optional display of real-time metrics (i.e., statistics updated every five seconds) related to your and your team's performance. For example, it can display the current number of calls in the service queue.

When enabled, the Dashboard is located in the middle of the application's status bar (the same bar that is used to display and select your current state). The metrics displayed on your Dashboard will be configured by your contact center administrator. The Dashboard can help you stay mindful of your work and keep a productive pace.

Click to learn more about Dashboard metrics and statistics.

Articles

The following is a list of articles in this section:

- Metrics
- Auxiliary Metrics

Example of an active Dashboard

Ways to Request Assistance

While handling a service interaction, you have multiple ways to request assistance:

- Flag the interaction by clicking the **Flag** button . The request for help will be displayed on the supervisor's screen. The supervisor may then connect to your service call in Coaching or Barge-In mode. In Coaching mode, you will hear the supervisor, but the other party on the call will not. In Barge-In mode, all three of you will be able to talk to each other as if during a regular three-way conference call. Depending on your system configuration, the supervisor may also be able to see your screen.

- Use internal chat to contact an internal party that can help you. For more information, see section How to Use Internal Chat.

- Make a consultation call to an internal or external party that can help you. For more information, see section How to Make a Consultation Call. Remember that after making a consultation call, you have several options, including returning to your primary call, transferring your customer to the consultation party, or connecting the consultation party to your primary call for a three-way conference. For more information on the latter two options, see sections How to Transfer a Call and How to Host a Conference.

User Interface Overview

The Agent Desktop application user interface is shown with an active call. Its main elements are shown, and these elements are often referred to in the subsequent sections of this guide.

The elements of Agent Desktop

Menu Elements and Functions (at left side of Agent Desktop)

The elements of the Agent Desktop application screens perform the following functions.

Active Conversations List (ACL)

The *Active Conversations List* shows all your active interactions. For example, if you make a consultation call while holding a service call, this list will show them as two separate items. When you select a particular call or chat from this list, more information about this interaction and the related controls will appear in the *Contact Info Panel*. When you select an email from this list, the email content and the related controls will appear in the *Context Information Area*. For emails, the *Active Conversations List* also provides access to your team email queue, your personal email queue, and case history.

Active Conversations List

Contact Info Panel

The Contact Info Panel provides information about and controls the interaction selected in the*Active Conversations List*. This is the area of the application that you will use most often to handle your active (established) calls and chats.

The Contact Info Panel contains the following:

- *Service Selector* for associating calls with the specific services your contact center provides
- *Number Input Field* for entering phone numbers for outbound and internal calls
- *Directory and Dial Pad* for accessing your company's directory of users and accessing the standard phone dial pad

Contact Info Panel

User Status Indicator/Selector

The *User Status Selector and Indicator* displays your current state and, when clicked, a drop-down list of other states to select. You can use the selector to change your state manually.

For more information, see section Understanding and Handling Your States.

Changing your agent state

Timer

The timer indicates the time spent in the current agent state.

Conversations

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

The contents of your Context Information Area (at the center of the Agent Desktop) depend on what you are currently doing while logged in to Agent Desktop. For example, in the screenshots shown, the user is viewing the *My Grades* section of Agent Desktop while navigating to *Conversations.*

Notice the difference between the two Agent Desktop views shown.

Click the Conversations icon to display the Active Conversations List

The Active Conversations List appears on the Agent Desktop

Directory

The *Directory* is your contact center's ready-to-use phone book, allowing you to browse through teams of agents, supervisors, or even important external contacts. The Directory stores the names, numbers, profile photos, and user state in your contact center. Users are organized according to teams, and you can expand or collapse the full list of users within each team.

Mousing over a user's name causes the phone icon and the chat icon to appear. Clicking on the phone icon will initiate a call to that user. Likewise, clicking on the chat icon will initiate a chat to that user.

Making an internal call

Favorites

The *Favorites* tab contains your personal list of frequent contacts; favorites may be both internal and external. Mousing over a Favorite contact's name causes the phone icon and the chat icon to appear. Clicking on the phone icon will initiate a call to that user. Likewise, clicking on the chat icon will initiate a chat/SMS/MMS to that contact.

Your favorite contacts

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

Add a contact to Favorites

Recent

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

Recent list

Dial Pad

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

Dial Pad

Directory and Dial Pad

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

The Directory and Dial Pad button has two different looks.

The first is a filled dial pad grid.

The second is an empty dial pad grid.

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

Mouse-Over-Active-53.PNG

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

Mouse-Over-Inactive-53.PNG

Text Input Field

The *Text Input Field* allows you to enter messages for real-time text-based interactions, such as service chat, SMS, and internal chat.

Type your message in the Text Input Field

Selected Conversation's Documents

If a conversation or case has been selected on the Agent Desktop, the email messages, chat messages, or other documents associated with the conversation will be displayed in the Context Information Area.

Calendar

Click the *Calendar* icon to view and edit the user's calendar in the Context Information Area. For more information, see section How to Open the Calendar.

The Agent Desktop Calendar

My Cases

Click *My Cases* to work with email cases from your Team Queue, Personal Queue, or Pinned Cases in the Context Information Area. For more information, see section General Information About Handling Email.

My Cases contains your email cases

Contacts

Click *Contacts* to search and view contact information for the people in your directory, cases, and recent contacts list.

My Cases

Supervision

The Supervision icon is shown only to supervisors logged in to Agent Desktop.

Chat Center

Click *Chat Center* to initiate chats with chat groups or personal chats with other users in your organization.

My Grades

Click *My Grades* to view metrics related to your and your team's performance in the Context Information Area. For a more detailed explanation, see General Information About My Grades.

My Grades

Controls Area (at top right of Agent Desktop)

This area on the user interface provides access to help materials, application settings, and the log out function.

Contact Search

Click the *Contact Search* icon to display a text field for searching your contacts.

Contact Search field

Wallboard

Clicking the *Wallboard* icon will direct you to the Wallboard Builder application in a new browser tab or window. Wallboards display statistics and informational widgets about your current performance and/or performance of your team. If you have the privilege to edit wallboards, you can customize them from the Wallboard Builder application.

Help

Click the *Help* icon to access help materials, such as links to documentation, HR, and procedures.

Agent Desktop Help

Settings

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

Settings

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

Mouse over Settings to view user name and extension

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

Log out

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

Logging out of Agent Desktop

Context Information Area (at center of screen)

The *Context Information Area* displays web pages and forms that can be used to provide the information you need in order to serve your customers (e.g., customer profile) and enter new information based on your conversation with the customer (e.g., a purchase order). The appearance of content in this area is often synchronized with the delivery of a customer interaction to your desktop (e.g., during call ringing). For more information, see section Understanding Screen-pop.

The Context Information Area is also used for the following:

- Your grades and wallboards
- Standard email processing functions such as message reviewing, reply editing, and case search
- Knowledge Base
- Pop-out chat panels
- The display of data received from customers during chat sessions
- Teams and services dashboards
- Calendar display

Alerts

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

Alerts indicate items requiring an agent's attention