

5.8 Selecting a Phone Device

Bright Pattern Documentation

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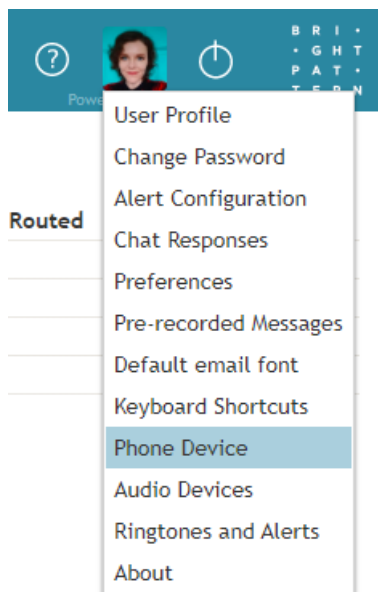
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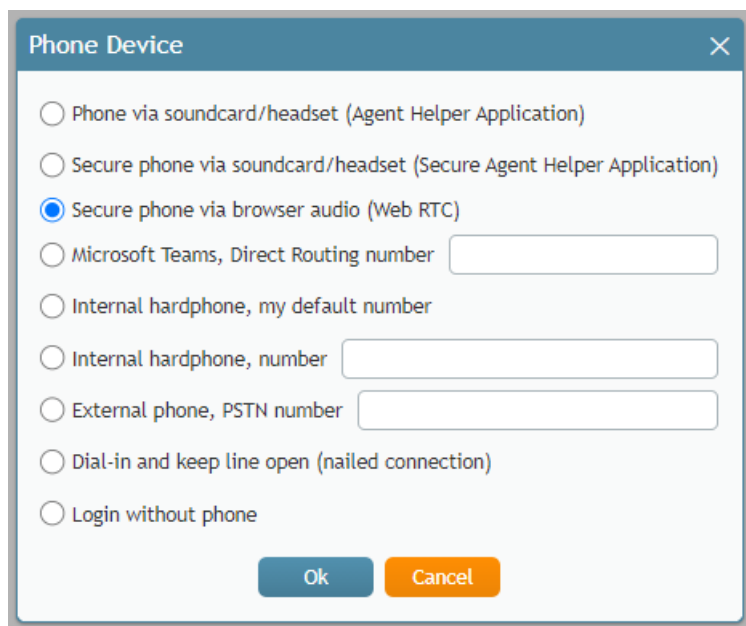
Phone Device

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

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.

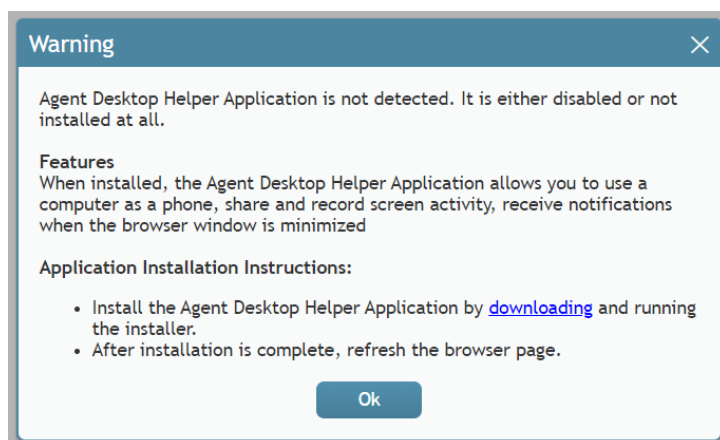
You don't need local system administrative privileges on your PC to set up and use Agent Desktop and Agent Desktop Helper Application

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

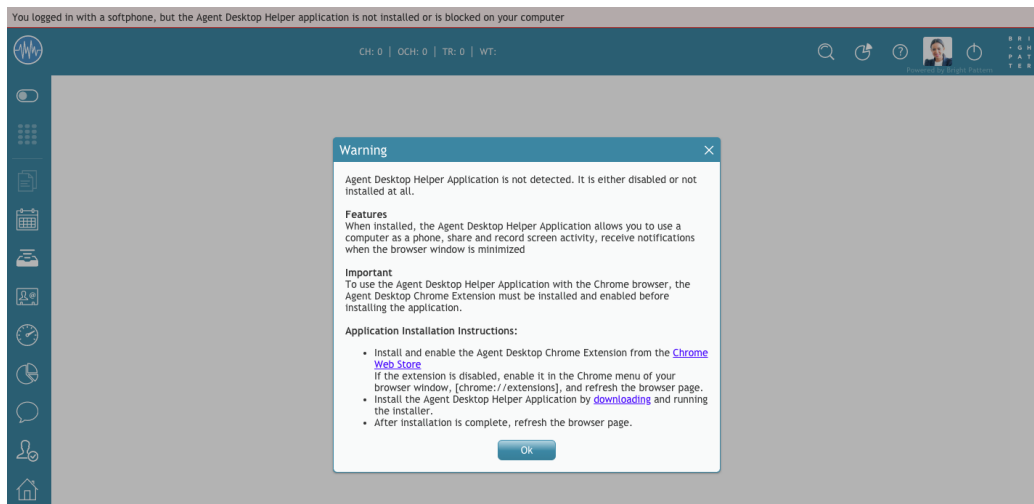
The Agent Desktop Helper Application is supported on Google Chrome, Microsoft Edge, Microsoft Internet Explorer, Mozilla Firefox, and Safari. Some browser extensions or other settings may need to be enabled, depending on your browser.

Chrome

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

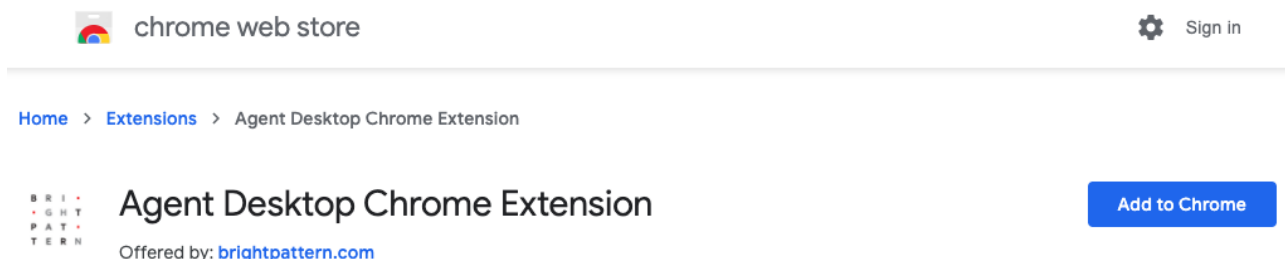
How to Enable the Extension for Chrome

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*).



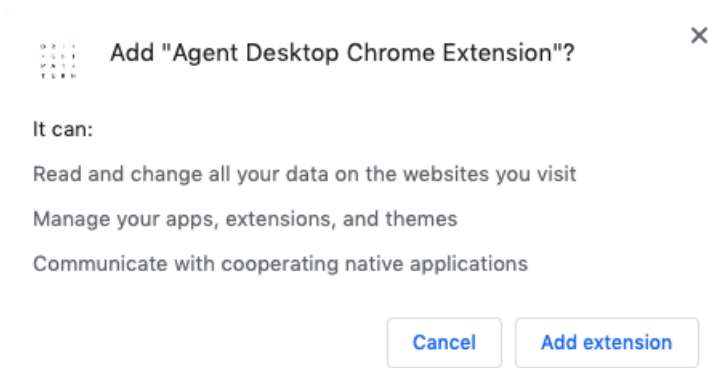
Agent Desktop update message

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



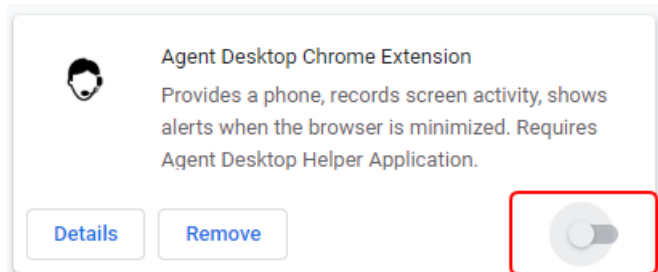
Chrome Extensions > Agent Desktop Chrome Extension

3. Then click **Add extension**.



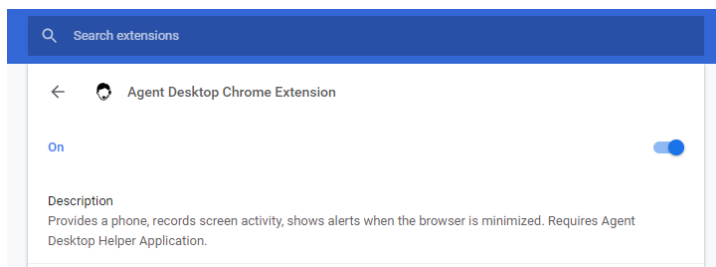
Confirm that you want to add the extension

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

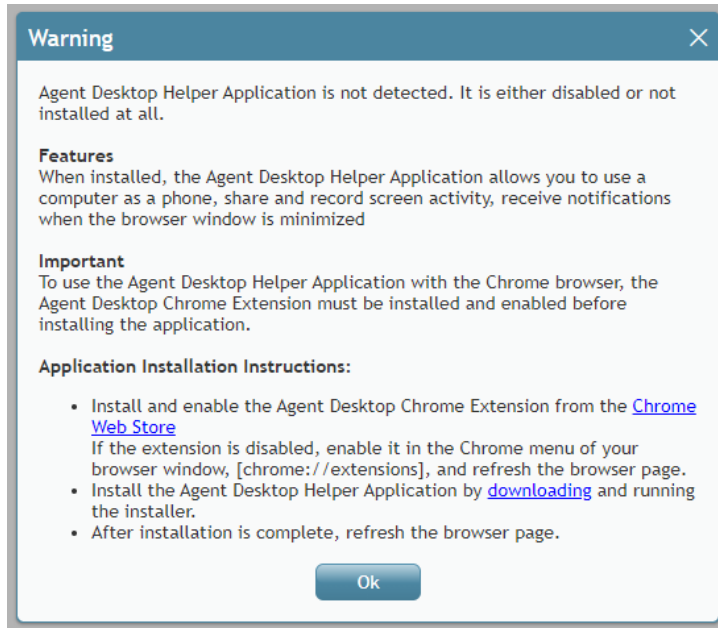
6. Go back to the Agent Desktop application and refresh the page. You can now begin using it.

Edge

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

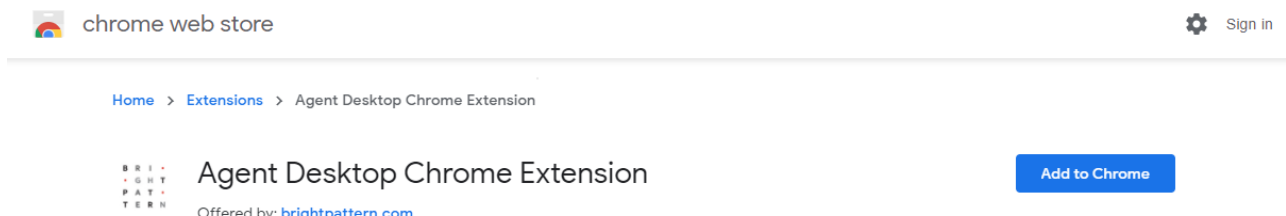
How to Enable the Extension for Edge

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



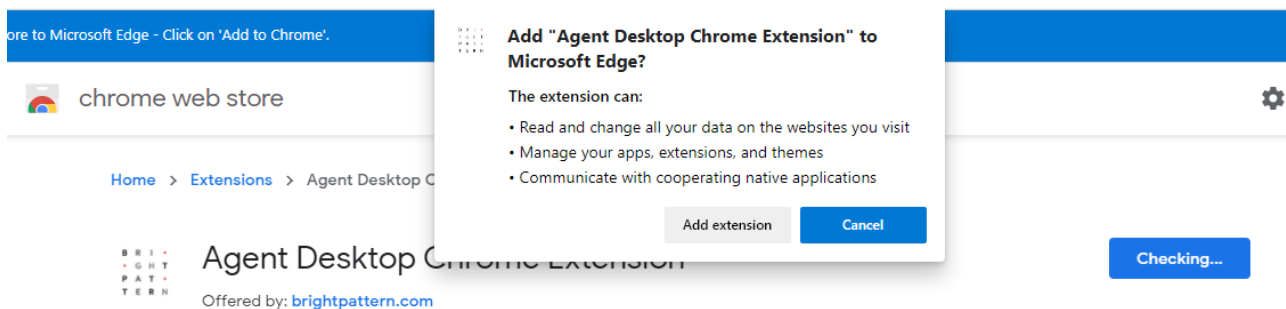
Agent Desktop update message

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



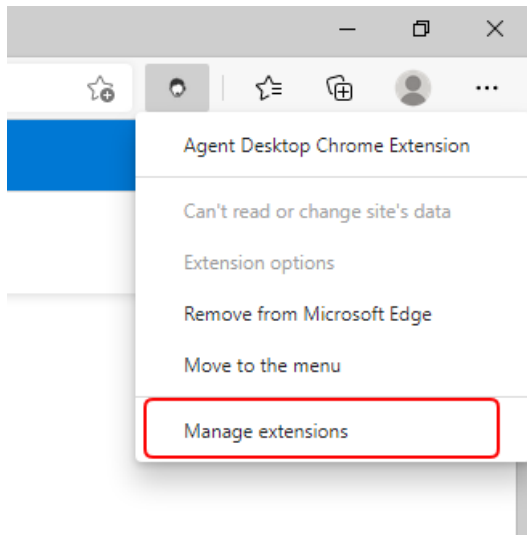
Adding the extension

3. Then click **Add extension**.



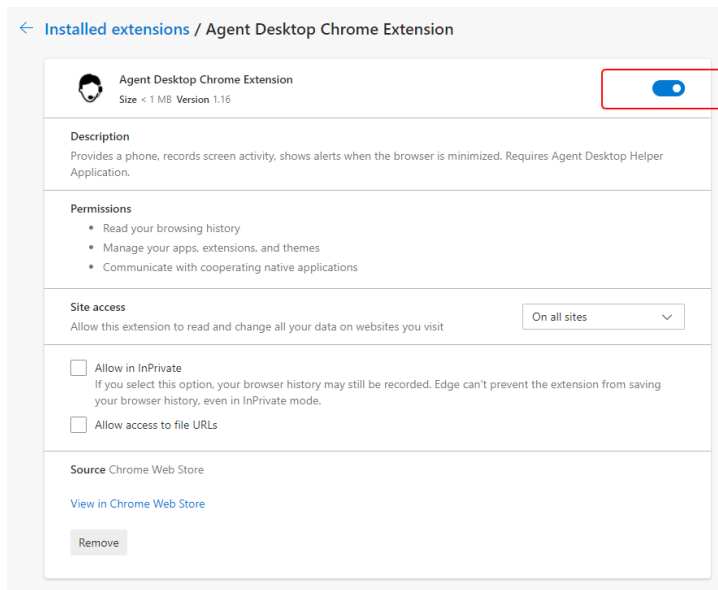
Confirm that you want to add the extension

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

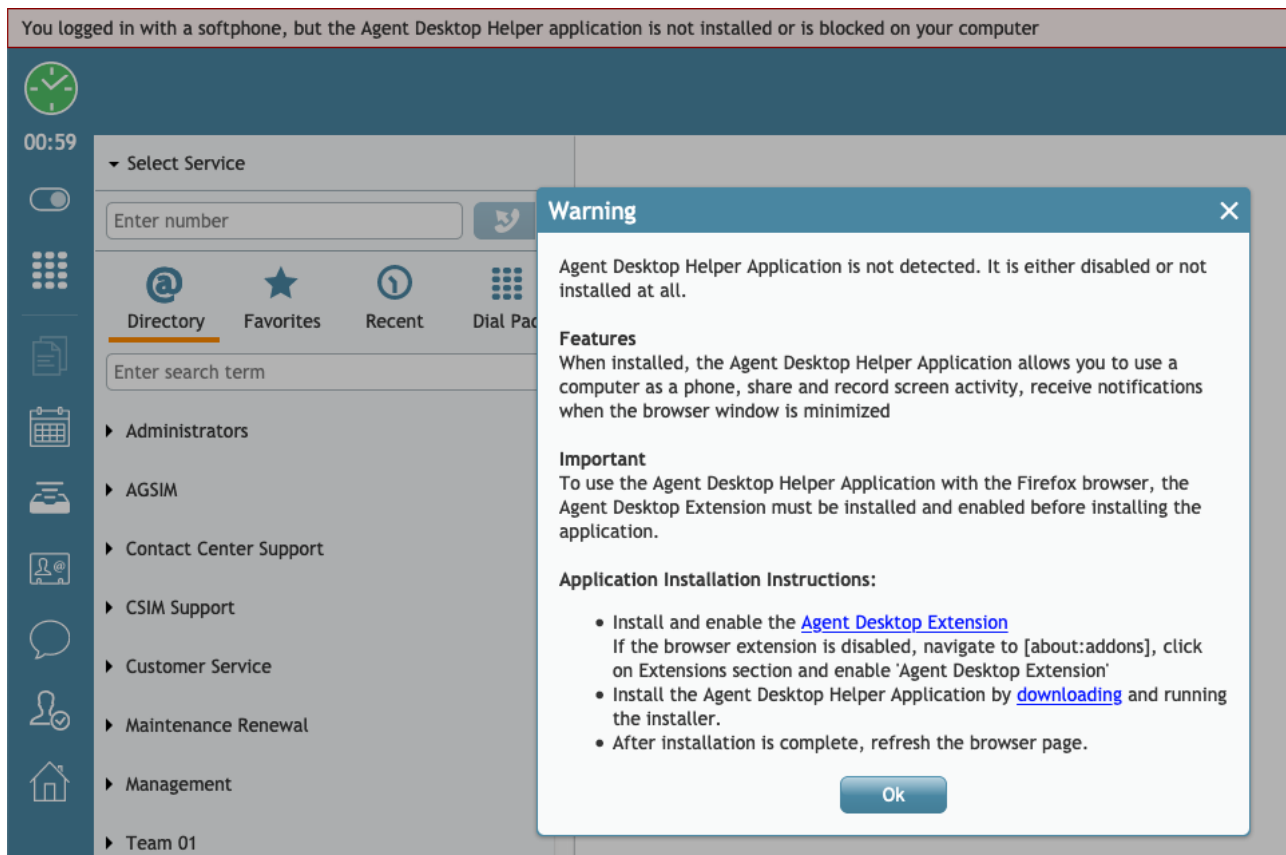
6. Go back to the Agent Desktop application and refresh the page. You can now begin using it.

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

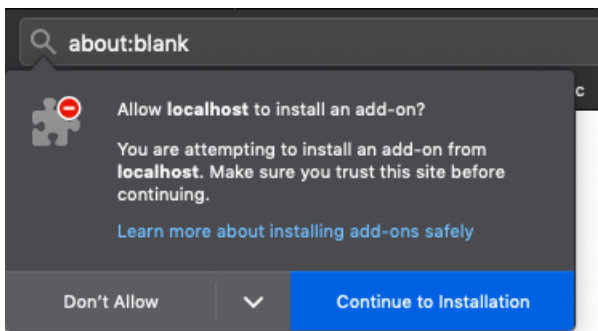
1. In Agent Desktop, you will be prompted by a warning message.



Example of an Agent Desktop warning message

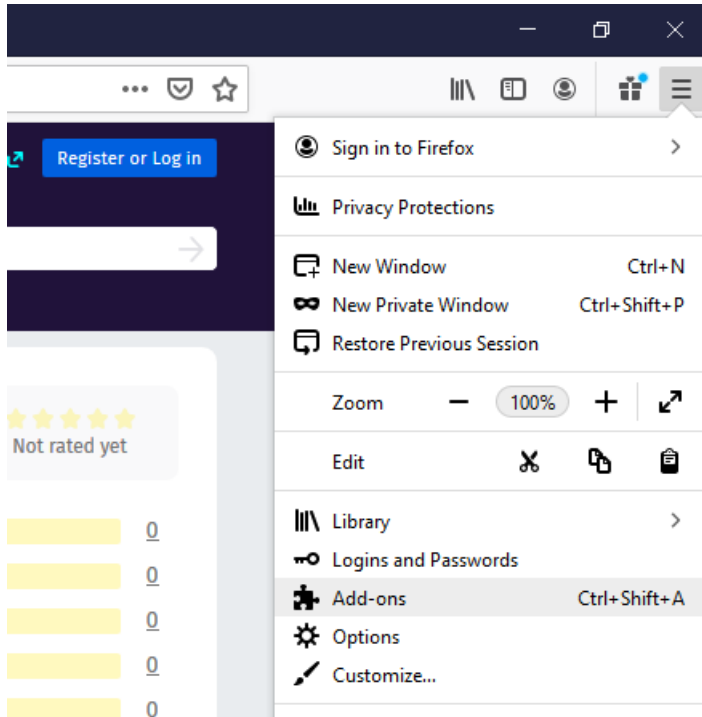
2. Follow the instructions in the message to download the Agent Desktop Helper Application (Mac: *bpclient_mac.pkg*, Windows: *BPClientSetup.exe*) and install and enable the Agent Desktop Extension:

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**.



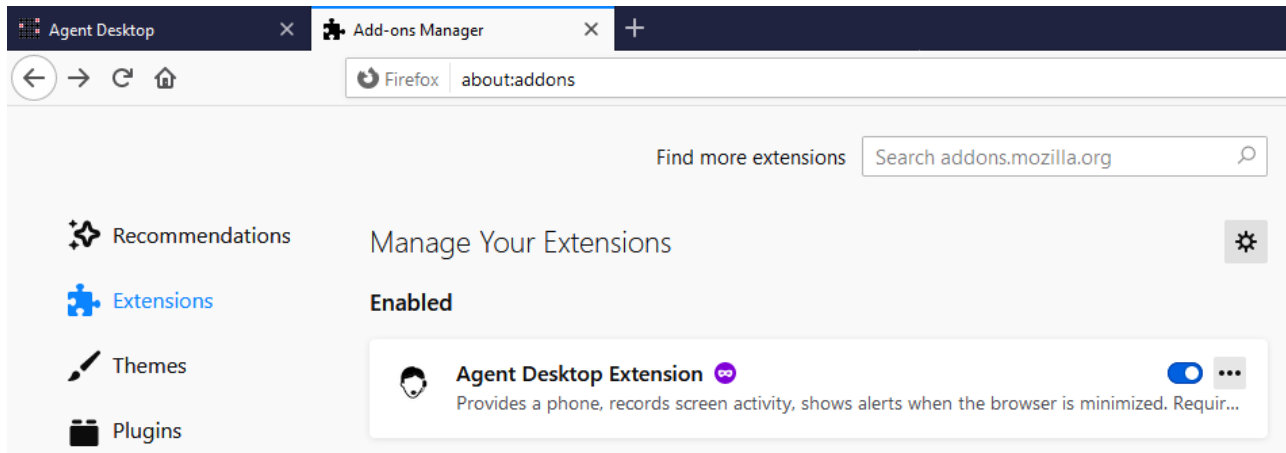
Example dialog for Firefox add-on installation

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

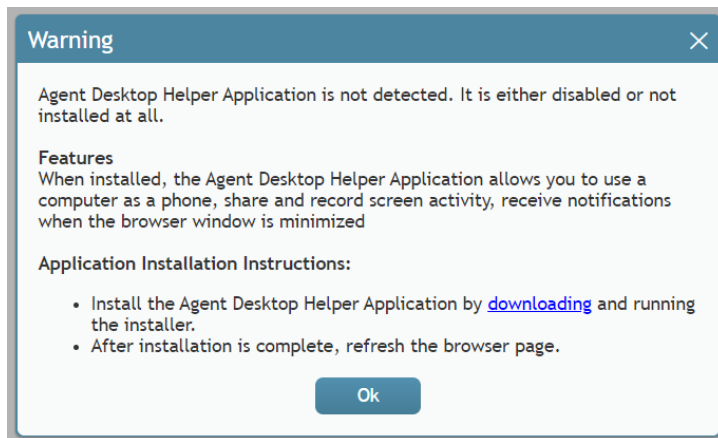
1. In the browser application, click **Tools** (Alt+X) and select **Internet options**.
2. Click the **Security** tab, and deselect the **Enable Enhanced Protected Mode** checkbox.
3. Click **OK**.

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.

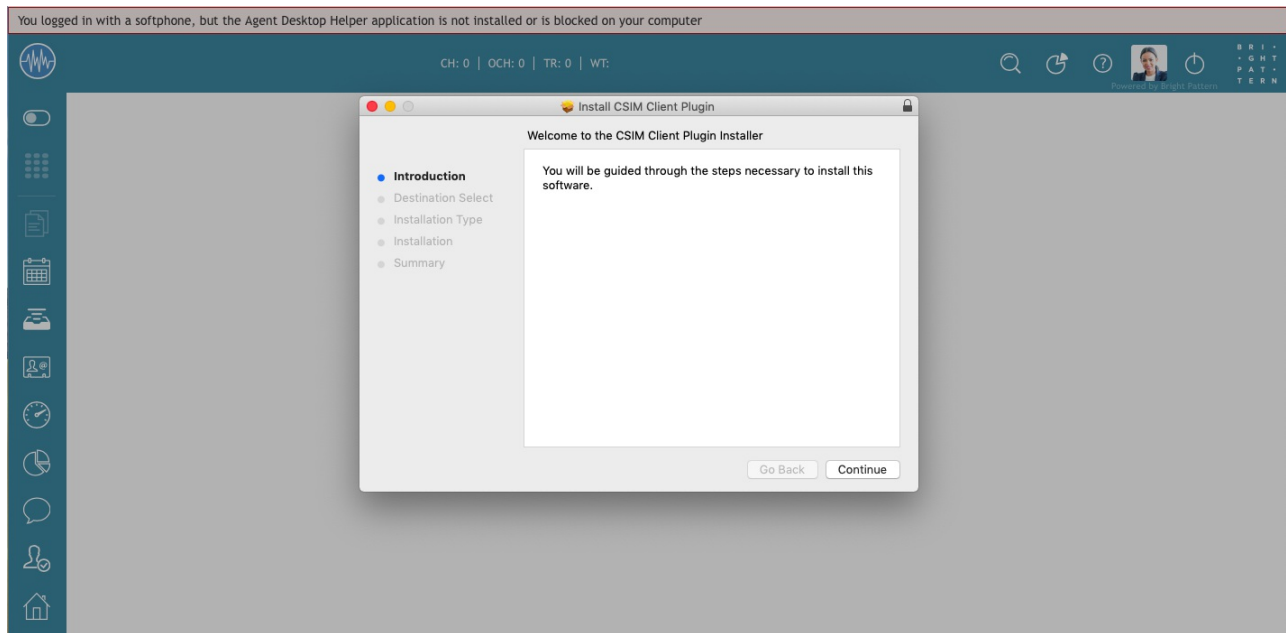
How to Enable the Application for Safari

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."



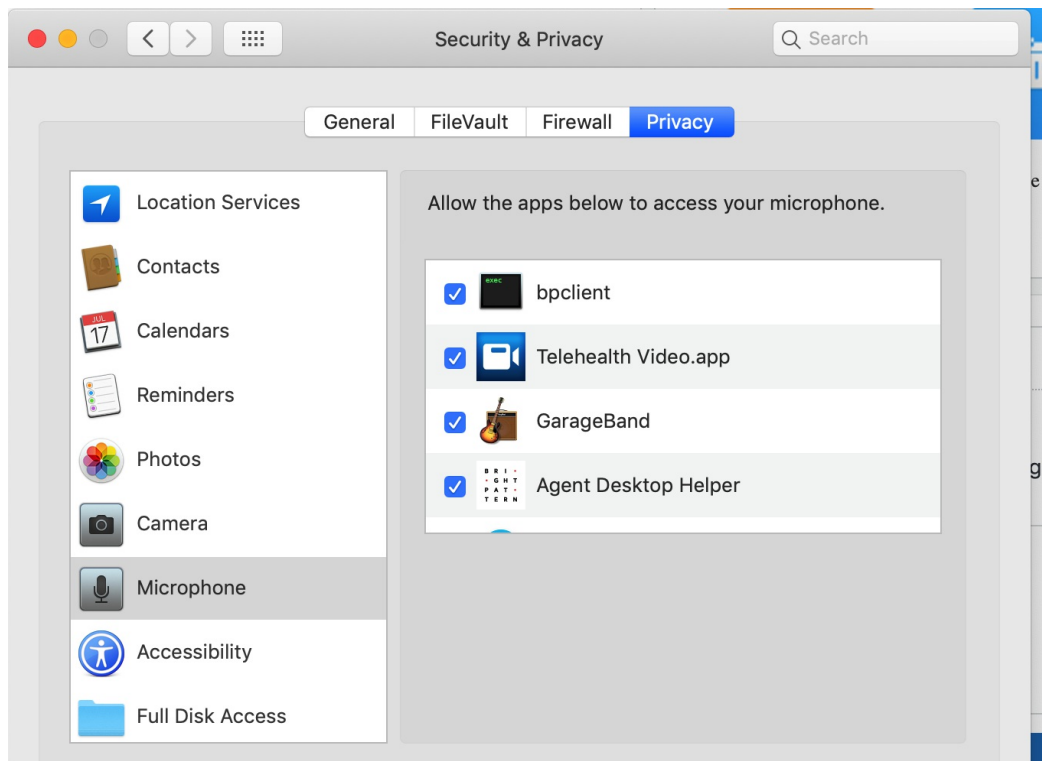
Install CSIM Client Plugin

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.

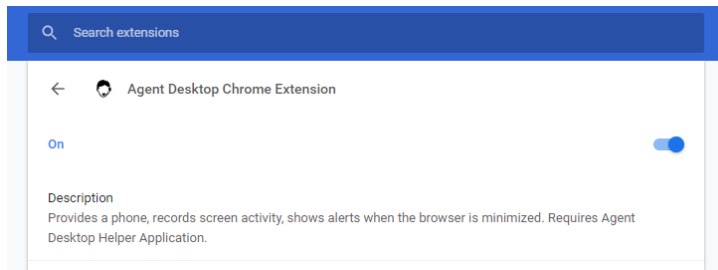
Troubleshooting

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.

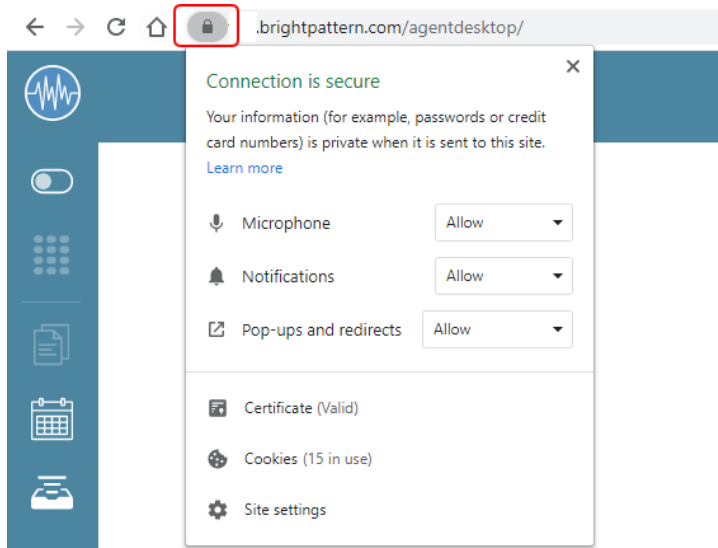
What this might mean:

- 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.

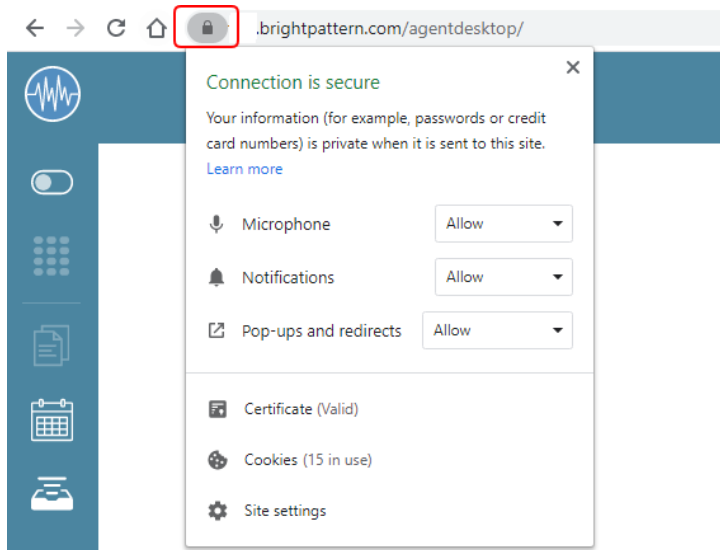
What this might mean:

- 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.

Purpose

The Bright Pattern Contact Center *Simplified Desktop .NET API Specification* describes the methods and events of the Simplified Desktop .NET API, which provides access to a number of functions of the Bright Pattern Contact Center Agent Desktop application from .NET-based third-party applications.

For more information about the Agent Desktop application, see the Bright Pattern Contact Center [Agent Guide](#).

Installing and Updating the Agent Desktop Helper Application

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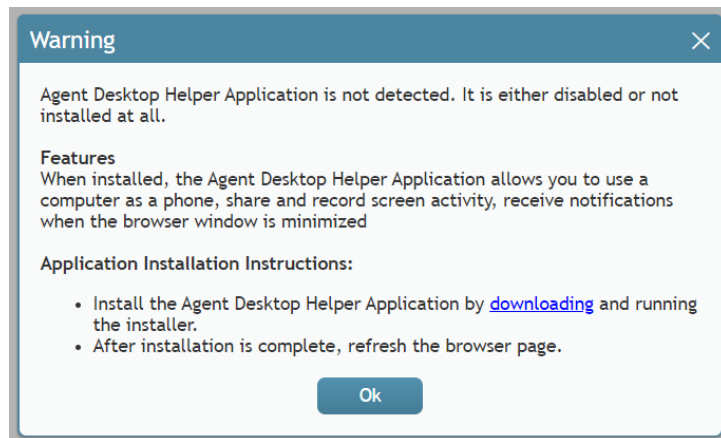
You don't need local system administrative privileges on your PC to set up and use Agent Desktop and Agent Desktop Helper Application

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Agent Desktop update message

How to Enable the Application for Various Browsers

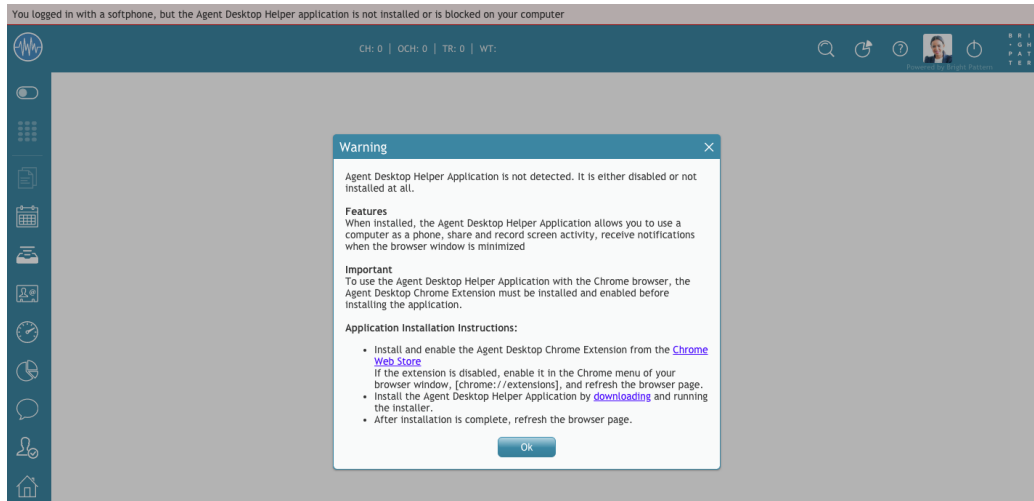
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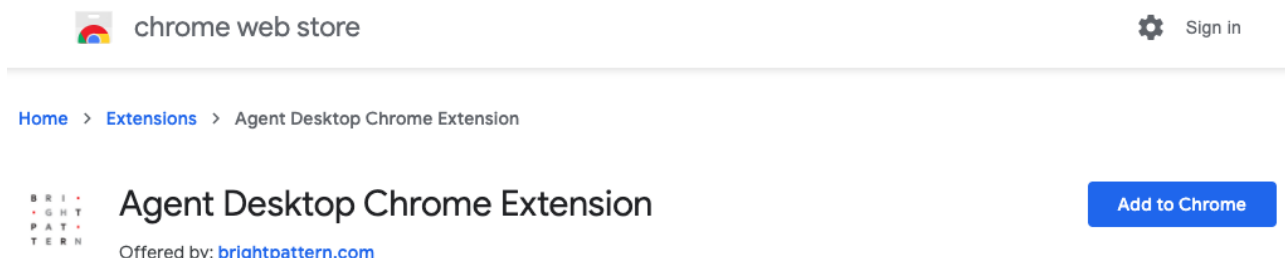
How to Enable the Extension for Chrome

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*).



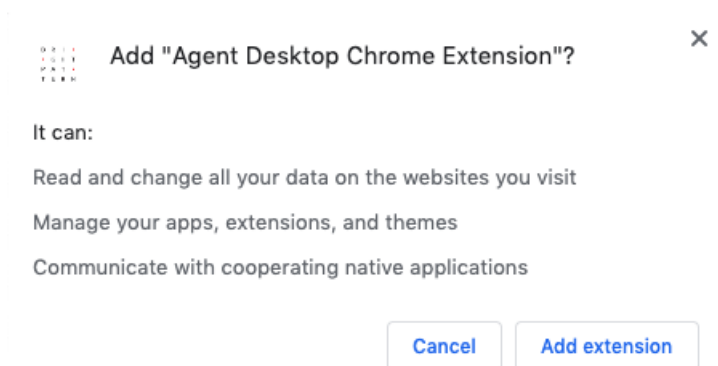
Agent Desktop update message

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



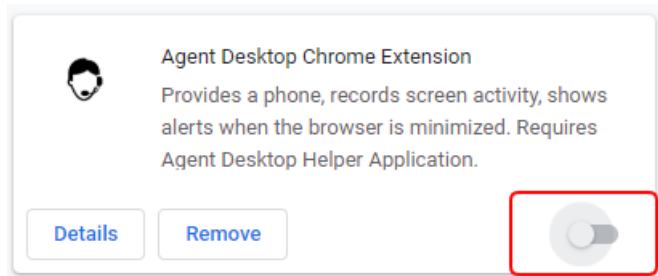
Chrome Extensions > Agent Desktop Chrome Extension

3. Then click **Add extension**.



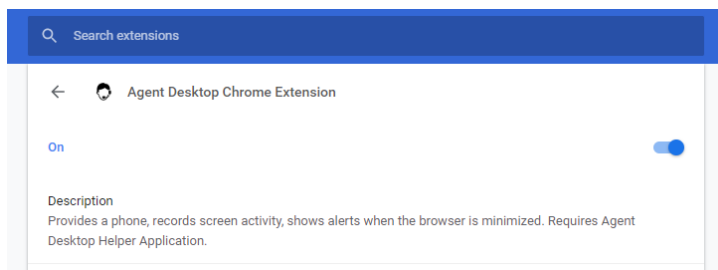
Confirm that you want to add the extension

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

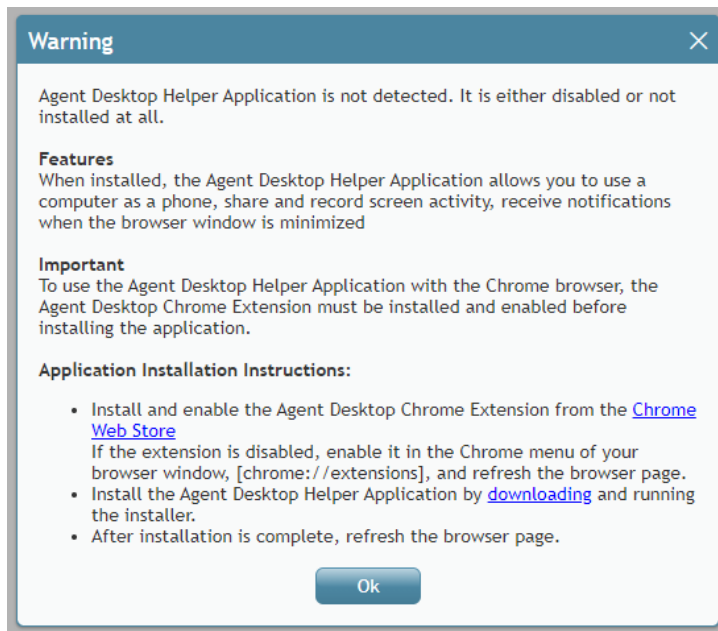
6. Go back to the Agent Desktop application and refresh the page. You can now begin using it.

Edge

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

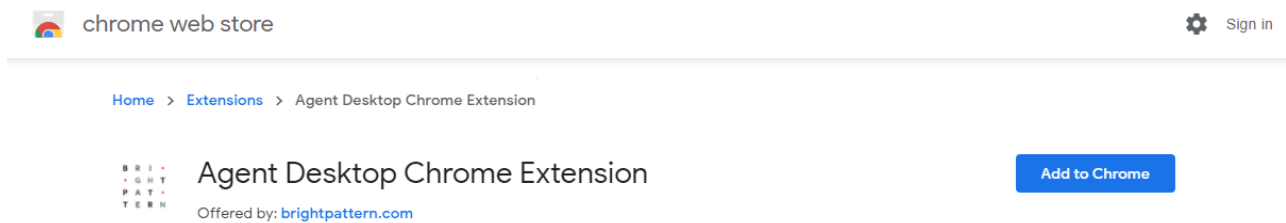
How to Enable the Extension for Edge

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



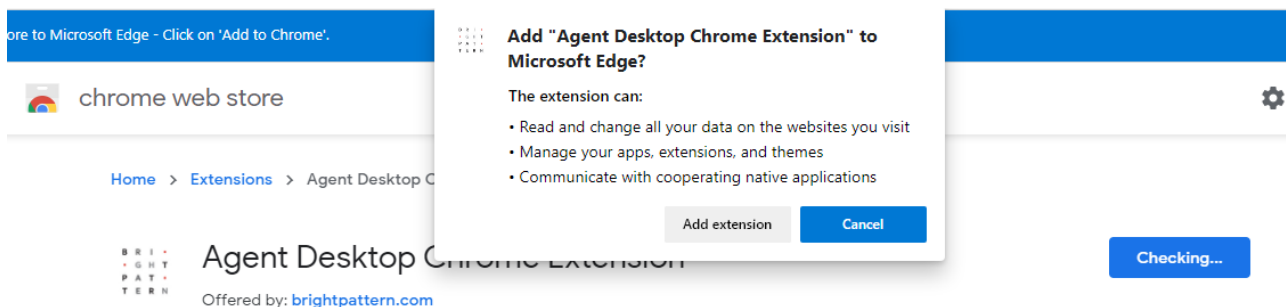
Agent Desktop update message

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



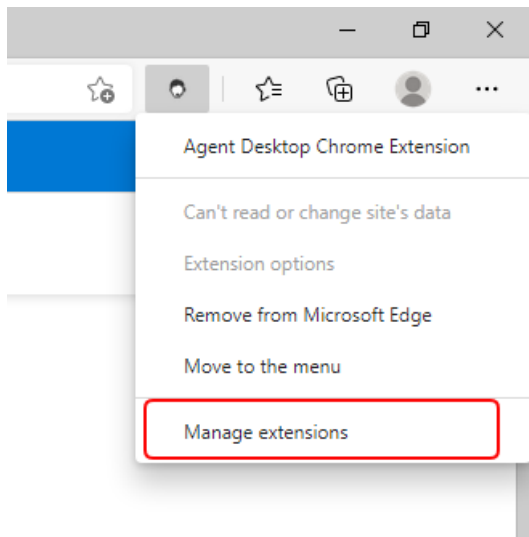
Adding the extension

3. Then click **Add extension**.



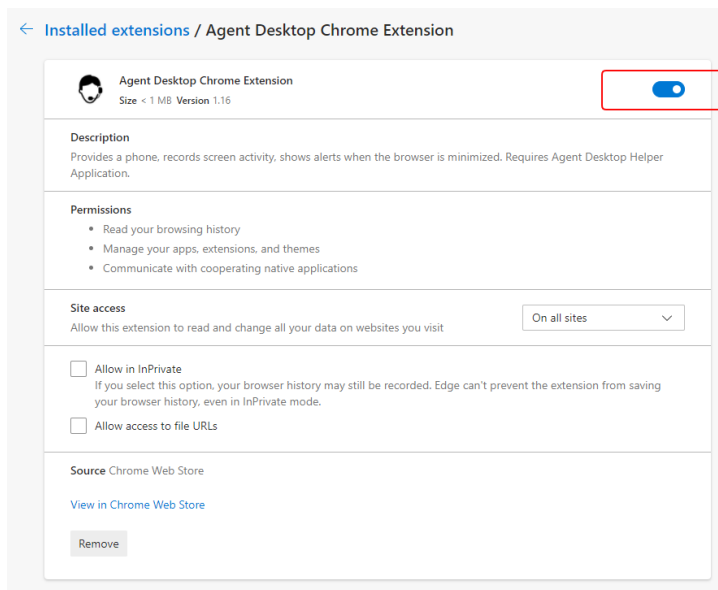
Confirm that you want to add the extension

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

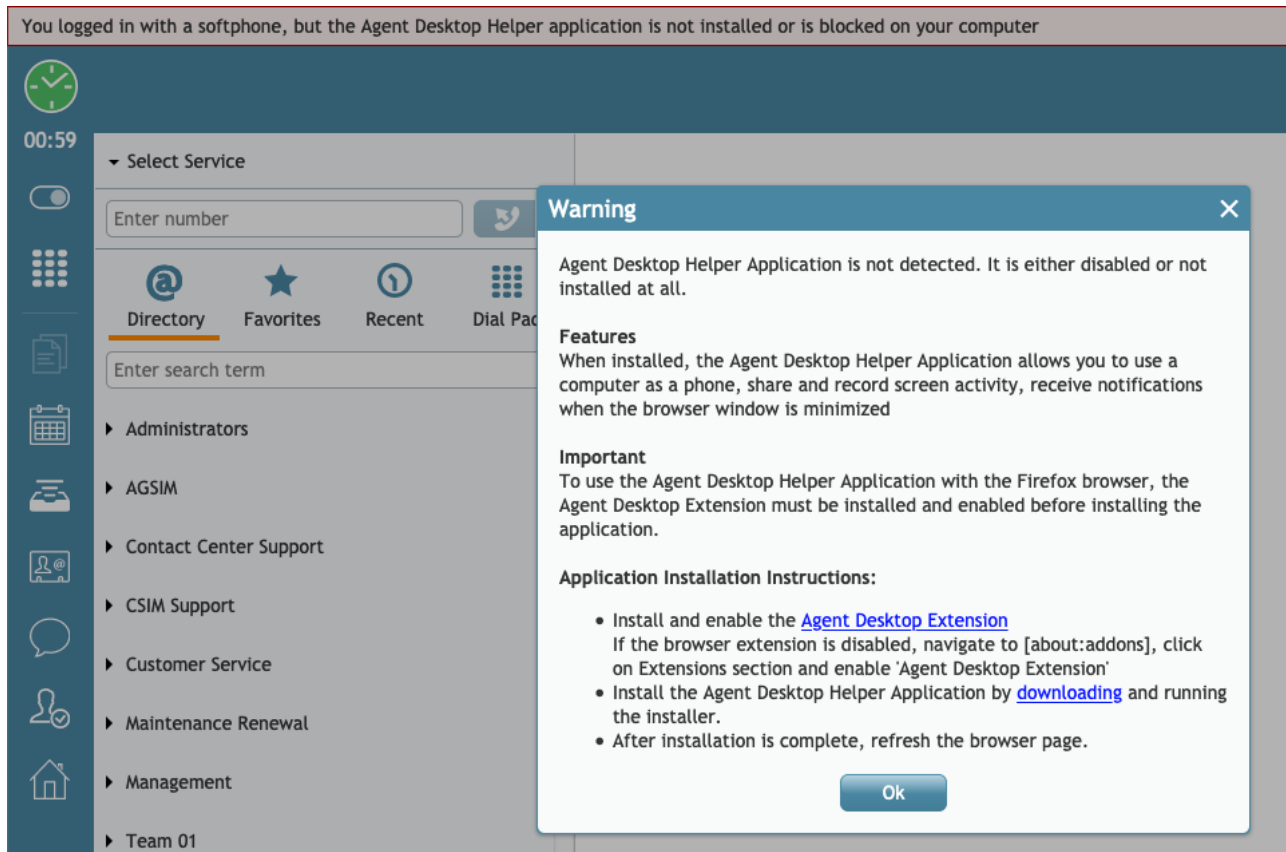
6. Go back to the Agent Desktop application and refresh the page. You can now begin using it.

Firefox

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

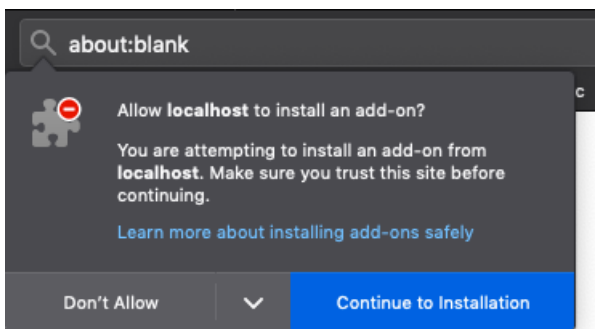
How to Enable the Extension for Firefox

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



Example of an Agent Desktop warning message

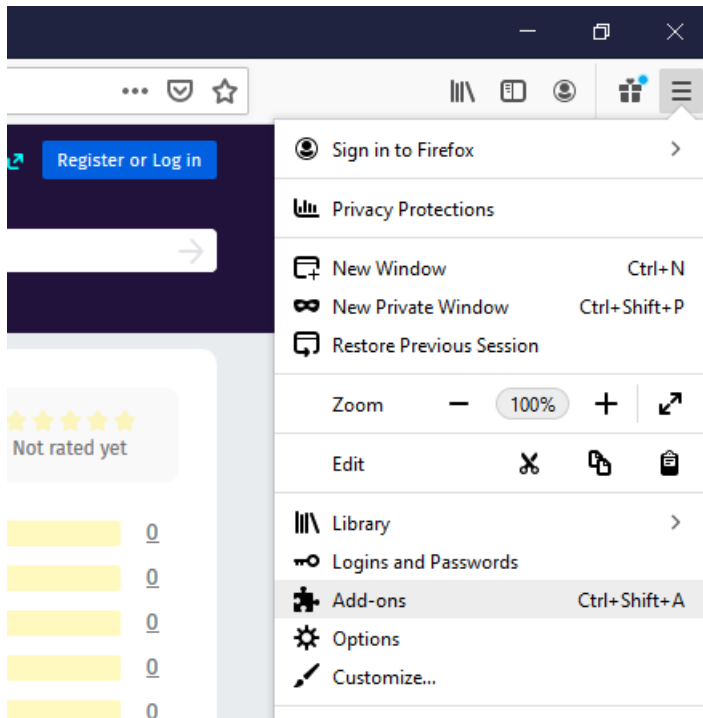
2. Follow the instructions in the message to download the Agent Desktop Helper Application (Mac: *bpclient_mac.pkg*, Windows: *BPClientSetup.exe*) and install and enable the Agent Desktop Extension:
 1. Click the **downloading** link to download the application.
 2. Run the installer, and follow all 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

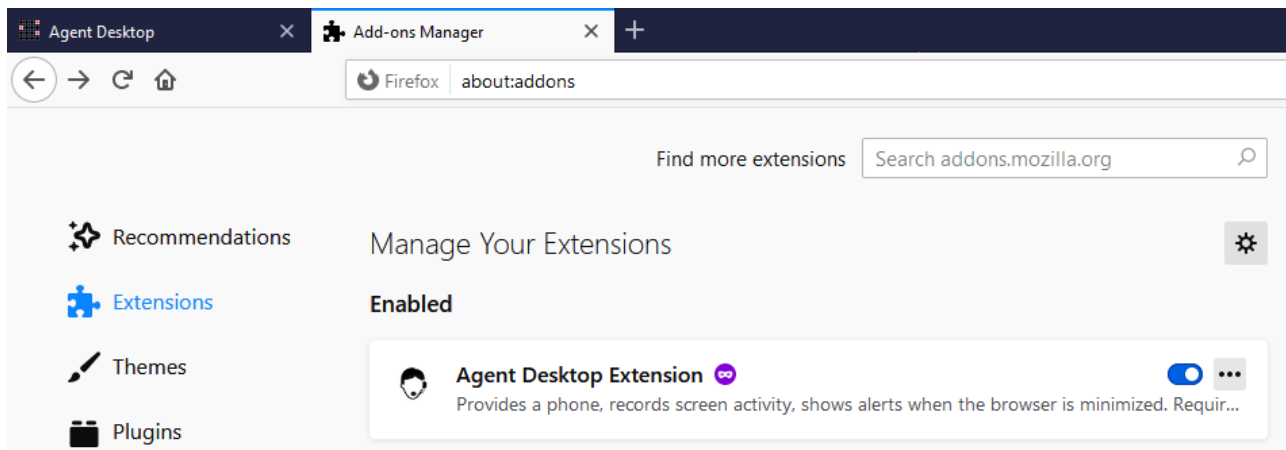
3. Make sure that the extension is enabled in Firefox Add-ons. Go to *Firefox Menu > Add-ons* (or type

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 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

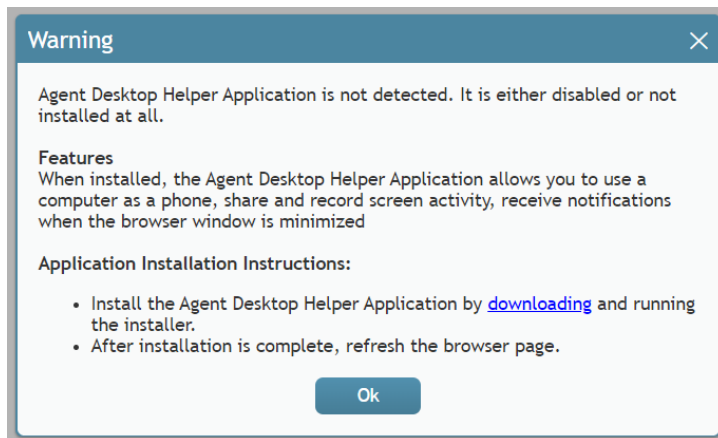
1. In the browser application, click **Tools** (Alt+X) and select **Internet options**.
2. Click the **Security** tab, and deselect the **Enable Enhanced Protected Mode** checkbox.
3. Click **OK**.

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.

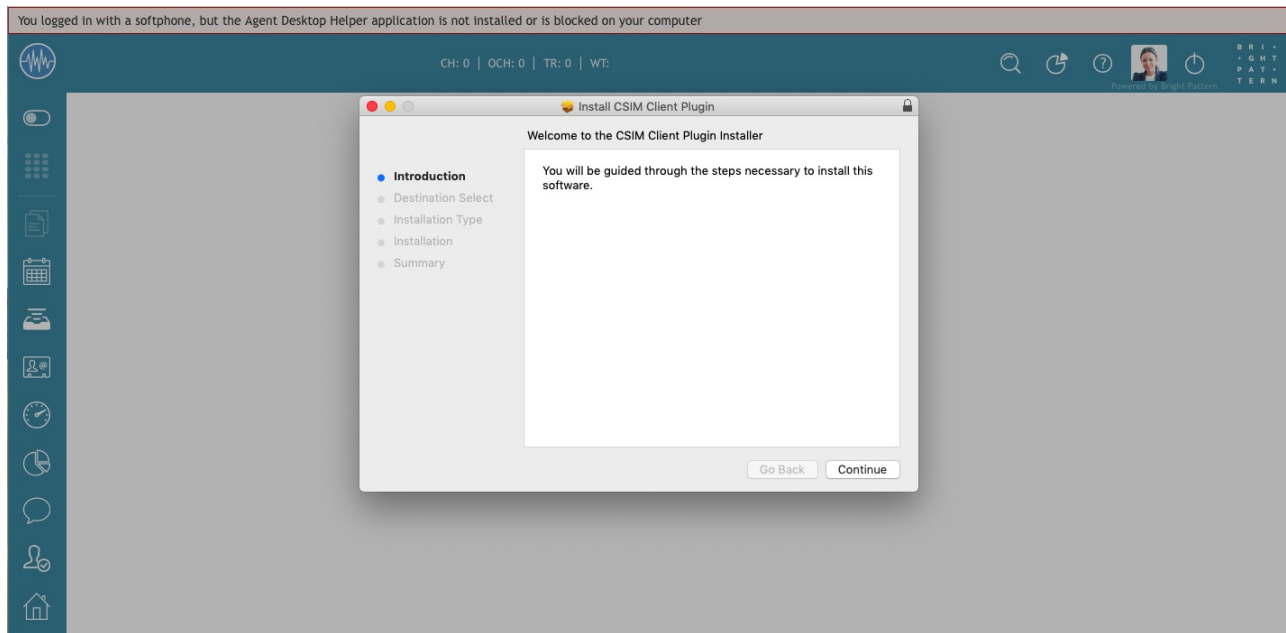
How to Enable the Application for Safari

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."



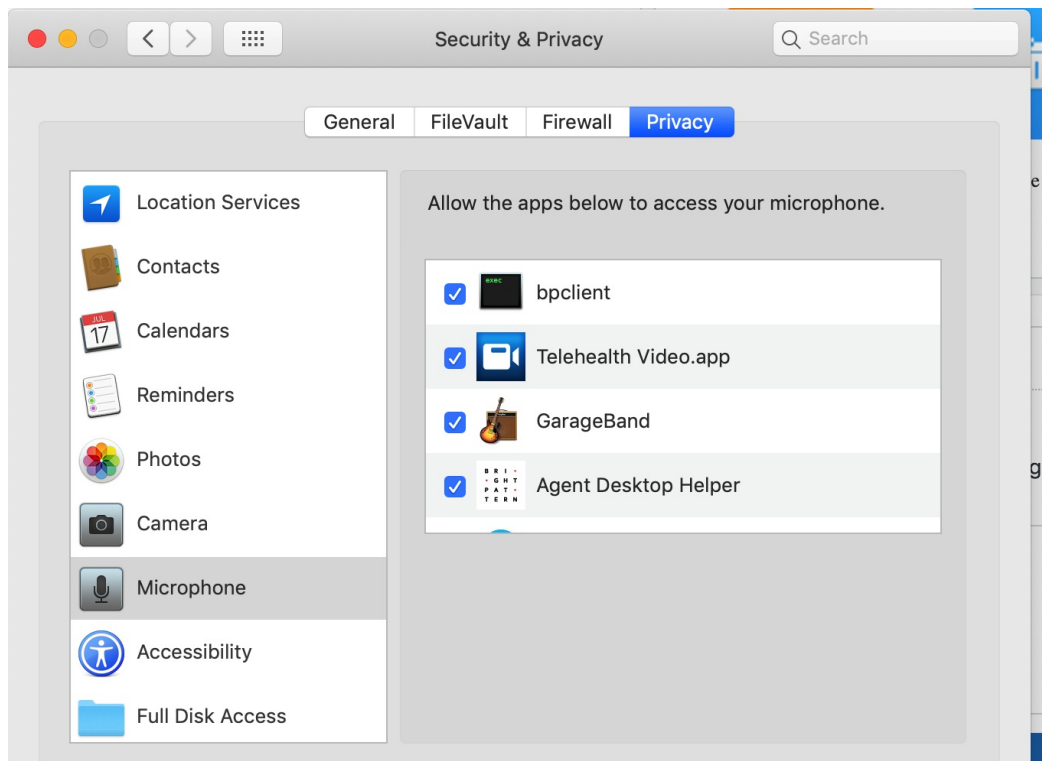
Install CSIM Client Plugin

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.

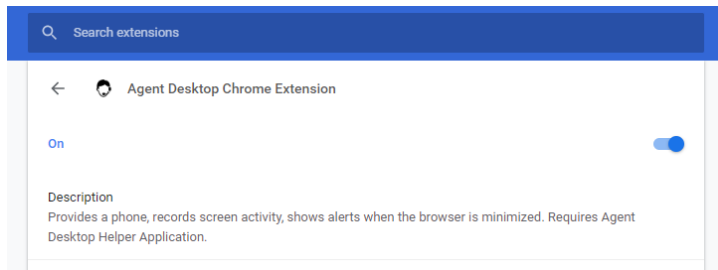
Troubleshooting

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.

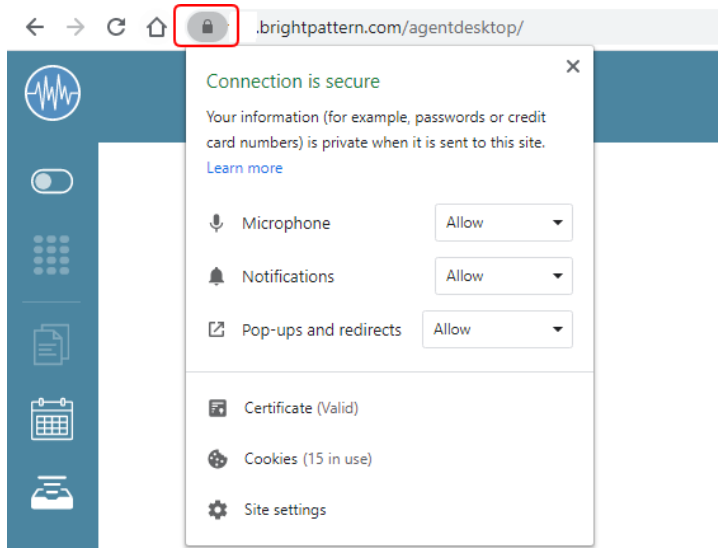
What this might mean:

- 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.

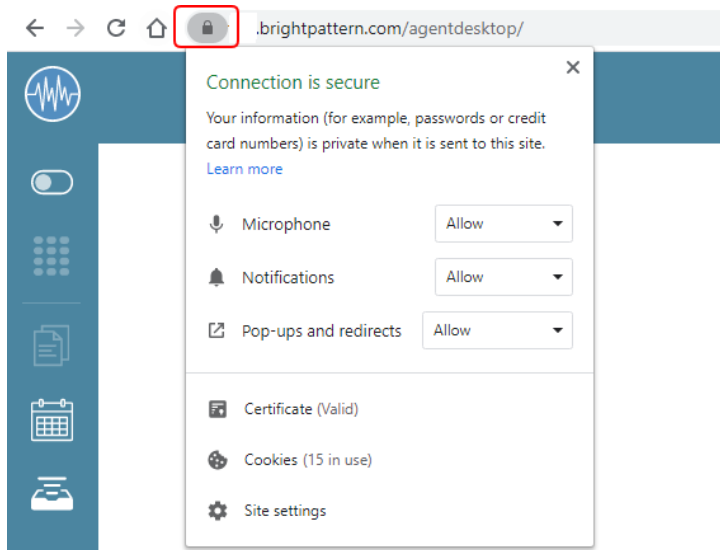
What this might mean:

- 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.

How to Use the Directory

You can contact users registered in your contact center by selecting them from the Directory tab. The directory displays users in your organization grouped by teams. It may also show service queues and some frequently used external numbers.

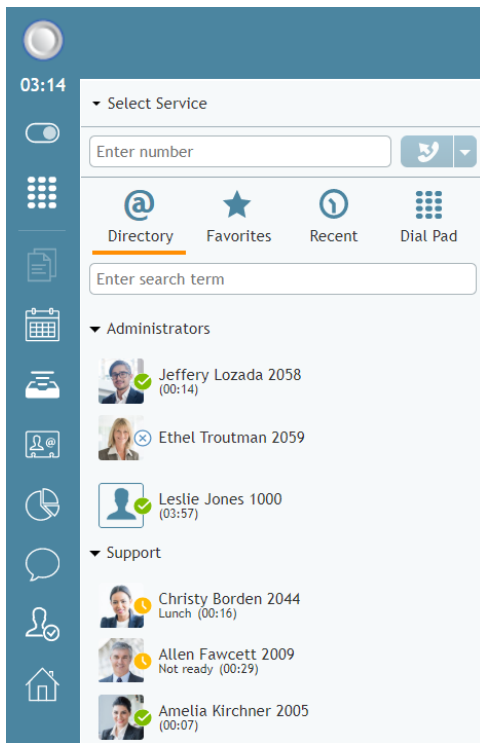
To view directory contacts, click the **Directory** tab. The directory will initial. Service queues and external numbers also will be organized in folders. To see items of a particular team or folder, click the arrow icon next to its name.

Additionally, you can search for a directory item by typing the contact name or number in the search field that you see above the list of contacts. As you type, only the matching items will remain visible in the directory.

For users registered in your contact center, the directory provides information about their current availability to communicate:

- For agents, depending on your contact center's configuration, you will see either [agent state icons](#) or [presence icons](#).
- For non-agents, presence icons are always shown.

- Depending on your contact center configuration, the directory may also show you the current status of your voice and chat queues. This may be helpful when you need to [transfer](#) a call/chat to one of those queues.



Directory

Placing a Call From the Directory

To call a number from the directory, follow these steps.

1. Select the contact you wish to call. The contact's number will appear in the *Number Input Field*.
2. If necessary, select the service as described in section [How to Make an Outbound Call](#).
3. Click the **Initiate call** button.

Presence Icons

Available



The user is at the desk and is not on a phone call.

Away



The user is logged in but is likely to be away from the desk at the moment. This status is assigned automatically if no computer activity has been detected for the last 15 minutes. As soon as some activity is detected, the user is automatically switched to status *Available*. This status does not prevent you from attempting to contact the user.

Do Not Disturb



The user has manually set the status indicating the desire not to be contacted at the moment. This status does not prevent you from attempting to contact the user.

On the Phone



The user is currently on a phone call. This status is assigned automatically when the user makes or answers a phone call. This status applies to users busy with phone calls only; status *Available* will be displayed for users who handle interactions of any other media types.

Logged out



The user is currently logged out.

Agent State Icons

Ready



The user is in the [Ready](#) state.




Not Ready



The user is in the [Not Ready](#) state. Note that the text of both [system Not Ready reasons](#) and [custom Not Ready reasons](#) are displayed.

Busy

The user is in the [Busy](#) state. For this state, the directory displays the media type of the interaction the user is busy with (i.e., call, chat/SMS, email, or preview).

- Busy Call 
- Busy Chat 
- Busy Email 

- **Busy Preview** 

If an agent has multiple interactions of different media types, only one media type is displayed in the following precedence order:

- Call
- Chat
- Preview
- Email

After Call Work



The user is in the [After Call Work](#) state.

Supervising



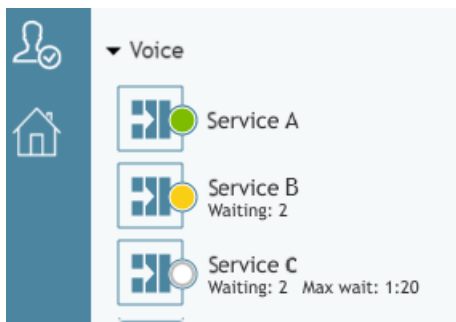
The user is in the [Supervising](#) state.

Logged Out



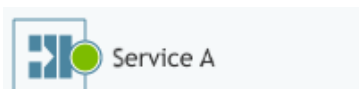
The user is logged out.

Service Queue Icons



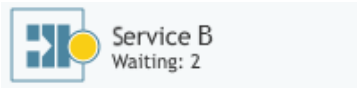
Example of queue icons shown in the directory

Logged in, Ready



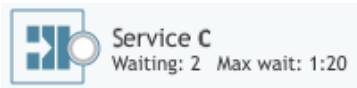
For this service, one or more agents are currently in the [Ready](#) state. The availability icon is shown in green. If any additional service metrics are [configured to be shown in the directory](#), those metric names and values are shown next to the availability icon.

Logged in, Not Ready



For this service, one or more agents are logged in but none are currently in the [Ready](#) state. The availability icon is shown in yellow. If any additional service metrics are [configured to be shown in the directory](#), those metric names and values are shown next to the availability icon.

Logged out



For this service, all agents are currently logged out. The availability icon is shown in white. If any additional service metrics are [configured to be shown in the directory](#), those metric names and values are shown next to the availability icon.

1. REDIRECT [5.3:Agent-guide/Tutorials/Calls/HowtoAnsweranIncomingCall](#)
1. REDIRECT [5.3:Agent-guide/Tutorials/Calls/HowtoAnsweranIncomingCall](#)
1. REDIRECT [5.3:Agent-guide/Setup/HowtoTerminateYourWorkingSession](#)