5.8 Tutorials

Bright Pattern Documentation

Generated: 10/23/2021 11:35 pm

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Agent Tutorials

Agent tutorials explain how to perform specific tasks within the Agent Desktop application.

Explore tutorials to learn more about the following topics:

- Calendar
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- Chats
- Contacts
- Knowledge Base
- Microsoft Teams
- Outbound Campaigns
- Search
- States

Calendar Tutorials

These tutorials provide step-by-step instructions for everything related calendars:

- 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
- How to Warm Transfer

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 Tutorials

The Cases and Email section's tutorials explain how to use Agent Desktop to process customer requests made via email, as well as what to do with customer cases. Emails are bundled into cases when multiple email messages from the same contact are related to the same issue.

Articles

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

- Filtering Case History Content
- 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 InsertImages into Email
- How to Insert Hyperlinks into Email

Masking Data

- How to Remove Sensitive Data from Emails

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

Chat Center Tutorials

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

- How to Use Personal Chat
- How to Use Group Chat

Service Chat Tutorials

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

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

Sending Chat Messages

- Chat Messages
- How to Send and Receive Pictures and Documents

Terminate the Chat

- How to End a Chat Session

Transfers

- How to Transfer Your Chat Session

Contacts Tutorials

Agent Desktop's Search and Preview Records section, formerly known as *Contacts*, stores information about a person's contact details, activity history, cases, call recordings, chat transcripts, and contains a powerful search tool.

For more information, see Search and Preview Records Overview as well as our Search tutorials.

Articles

- How to Create a New Contact
- How to Edit an Existing Contact

Knowledge Base Tutorials

Knowledge Base is a collection of articles curated by your contact center. These articles address agent training, templates, preapproved replies to customer queries, email message templates, policy information, and much more. You can use Knowledge Base to find answers to customer inquiries, improve response times, and provide consistent replies to customers during service interactions.

Articles

- How to Contribute Content to the Knowledge Base
- How to Use a Knowledge Base Article

Microsoft Teams

If your contact center integrates with Microsoft Teams, you can access Teams communication channels information for personal chats and internal calls with logged-in Teams users (i.e., experts), while handling customer interactions in the Agent Desktop application.

Articles

The following articles provide instructional information on using Teams while working in Agent Desktop:

- How to Sign in to Teams Integrated with Bright Pattern Contact Center
- Accessing Microsoft Teams in the Agent Desktop Widget
- How to Get Help from Experts During Active Interactions Via the Directory
- How to Get Help from Experts Via Teams Channels
- How to Configure Your Teams Direct Routing Number as a Softphone Device
- How to Invite Experts to Join Conference Chats with Customers

Outbound Campaign Tutorials

Outbound Campaigns tutorials will show you how to participate in outbound campaign in either predictive, progressive, or preview mode.

Articles

- How to Reject a Calling Record
- How to Review a Calling Record
- How to Reschedule a Call Attempt

Search Tutorials

Agent Desktop's Search and Preview Records section, formerly known as *Contacts*, contains the search bar that allows you to look up contacts, cases, and much more. Search tutorials will show you how to use Agent Desktop's search bar as well as shortcuts to access case and contact information.

For more information, see Search and Preview Records Overview as well as our Contacts tutorials.

Articles

- How to Conduct Advanced Searches
- Using URL Variations to Access Case and Contact Information

States Tutorials

States tutorials will show you how to switch to a different state during your working session.

Articles

- How to Interpret Your Current State Information
- How to Make Yourself Ready
- How to Make Yourself Not Ready