5.8 Calls

Bright Pattern Documentation

Generated: 11/28/2021 5:31 am

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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]
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Sending Numeric Information

- How to Send Numeric Information

Service Queue

- How to Place a Call in a Service Queue

Call Controls

Agent Desktop contains tools that aid you while you make active calls. These include buttons that allow you to create cases, transfer calls, schedule follow-up activities, and so forth.

The following is a list of controls seen during active phone calls and what they do.

Controls seen during an active call

Service Name

During active phone calls, the name of the service the call is happening on is displayed above the selection of buttons.

Buttons

Add new case

The *Add new case* button allows you to create a new case from the phone call. Cases allow you to make notes on interactions, send emails, and so forth. For more information, see How to Create New Cases.

Dial Pad

When selected, the *Dial Pad*, pops out a dial pad, allowing you to either click the keys on the pad, use your keyboard to enter DTMF keys, or copy-paste a combination of digits into the number input field.[1] Note that this may be used to speed dial through external IVRs.

End Call

The *End Call* button ends the call when selected.

Flag the call

When selected, the *Flag the call* button causes a flag to appear on your supervisor's screen, indicating to them that you need help or consultation with the interaction. For more information, see How to Flag an Interaction.

Hold

The *Hold* button allows you to place a call on hold; callers will hear hold music or any prompts specific to your contact center. Call hold time will be displayed in the Active Conversations List. It is recommended to place a caller on hold before transferring them. Note that this button is different from the Mute the microphone button.

Displayed hold time

Initiate transfer or conference

When selected, the *Initiate transfer or conference* button pops a window that allows you to conduct a consultation with another agent or supervisor, conduct a conference call with multiple parties, or make a blind transfer. For more information, see How to Make Consultations and Transfers.

Mute the microphone

The *Mute the microphone* button mutes your microphone; callers will hear silence. Note that this button is different from theHold button.

Schedule a follow-up activity

The *Schedule a follow-up activity* button allows you to schedule follow-up activities in your calendar. For more information, see How to Schedule an Event.

Start recording

If your contact center allows recordings, the *Start recording* button allows you to manually begin recording the call.

Report a problem with the call

If you experience call quality issues, clicking **report a call problem** pops a window where you may select the type of issue you are experiencing; the issue is brought to the attention of your contact center administrators. For more information, see How to Report a Call Quality Problem.

Report a problem with the call

Notes

The *Notes* field is where you may enter any notes about an active interaction. For more information, see How to Enter Dispositions and Notes.

Dispositions

If your call center uses dispositions, you will be able to select the appropriate disposition from the drop-down menu. For more information, see How to Enter Dispositions and Notes.

Dispositions drop-down menu

How to Answer an Incoming Call

When a call is delivered to your desktop, you will hear a ringing tone in your headset and you will see a call alert pop-up window indicating an incoming call.

Call alert pop-up window

Your state will change from *Ready* to *Busy*, and the ringing icon will indicate the ringing phase of the call.

Call Alert Window

The call alert window will display relevant data that is dependent on the type of call.

- If the incoming call is a service call, the call alert window will display the service name to which the call was made.
- If the incoming call has been waiting in a queue, the call alert window will display the amount of time that the caller has waited in the queue, in minutes and seconds (e.g., "Q 2:57").
- If the incoming call is an internal call from another agent or a supervisor, the call alert window will display the name and extension number of the calling party.

There are two buttons: Accept and Reject.

- To answer the call, click the **Accept** button.
- The *Active Communications List* will display the inbound call icon indicating that the call is now established and the timer for this call will start.

Active Communications List shows the current call

For service calls, depending on your contact center configuration, you may hear an announcement of the service number to which the call was made. The calling party will not hear this announcement.

You can now greet the calling party and begin a conversation.

Note: If you do not answer a ringing service call within a predefined amount of time, you will be automatically switched to the *Not Ready* state. You will receive a clear indication for the reason of being in the *Not Ready* state and will need to make yourself manually *Ready* when you are ready to receive another call. Unanswered service calls will appear in your performance and activity reports.

How to Reject an Incoming Call

Typically, you will indicate your temporary unavailability to receive service calls by changing your state to *Not Ready* while handling a previous interaction. However, if a call was delivered to your desktop before you had a chance to make yourself *Not Ready,* you have an option to reject this call.

To reject a call that is ringing at your desktop, click the **Reject** button in the call alert pop-up window.

Call alert pop-up window

Rejection

If you reject a service call, it may be returned to the service queue to be answered by another agent.

If you reject an internal call, the calling party will get the busy tone indicating that you are unavailable at the moment.

After rejecting a service call, you will be automatically switched to the *Not Ready* state. You will receive a clear indication for the reason of being in the *Not Ready* state and you will have to make yourself *Ready* manually when you are ready to receive another call.

Note: Rejected service calls will appear in your performance and activity reports.

Dispositions and Notes

Dispositions are custom interaction results defined by your contact center management. When handling a service interaction, you may be required to select one of the dispositions that define the outcome of the interaction. If dispositions are defined for the services that you provide, the *Contact Info Panel* of your Agent Desktop will display the *Disposition Selector* for every associated service interaction.

If you are required to set dispositions, you will receive detailed instructions for their use from your system administrator. Learn more about dispositions and how they are managed in the *Contact Center Administrator Guide*.

In addition to dispositions, you can also enter free-form text notes to provide more information about the outcome of the interaction.

Disposition selector

How to Enter Dispositions and Notes

To enter a disposition for an interaction and/or related notes, follow these steps:

1. At any time during the interaction with the customer or while in the *After Call Work* state, click the *Disposition selector*.
2. From the drop-down menu, select the disposition that corresponds to the result of the interaction. Some dispositions specific to outbound campaigns may require additional parameters, such as scheduling of another call attempt. If such parameters are required, they will be displayed in the *Contact Info Panel*.
3. If necessary, enter free-form notes in the text field.
4. Continue to process the interaction normally. For more information about finishing interactions, see How to Release a Call and How to Wrap Up After-call Work.

Selected disposition and free-form notes

Note: If you use a custom form in the *Context Information Area* for processing data related to a specific call, both the *Disposition Selector* and the *Notes* field may appear in that form instead of the *Contact Info Panel*.

Other Uses for Dispositions

If configured for your contact center, a disposition can be used to trigger a *workflow*, an automated series of events that are initiated when an interaction is completed.

Workflows automate what happens after the conversation is done and will handle any necessary follow-ups, depending on the interaction’s disposition type. Such follow-up actions include setting context variables, sending an email, sending a text message, scheduling an event, clearing a scheduled event, and making a request. Workflows help to reduce your workload by following up with customers and gathering data in a consistent way.

For example, setting a particular disposition for an interaction could trigger the following series of events to happen:

1. Send a survey to the customer
2. Wait a specified amount of time (e.g., 30 minutes, 1 day, 1 week, etc.)
3. Send a follow-up email to the customer.

Using Dispositions to Request That Content Be Erased

Starting with Bright Pattern Contact Center version 5.2, you can use a disposition to request that content from a specific interaction be erased. This capability was added to meet PCI DSS 3.2 and GDPR requirements, which specify that sensitive data (e.g., credit card information) may not be stored in your contact center, even if it is encrypted. As such, Bright Pattern allows for the manual deleting of data that is stored in voice recordings, voice recording transcripts, chat transcripts, email messages, screen recordings, and so forth.

You can request that such data be erased, but only your system administrator can erase it.

What to Do

1. If such a disposition is enabled for your contact center, you can disposition an interaction with a request to erase content, provided that you give a reason. Note that the name of the disposition is determined by your contact center. If you do not know which disposition to select, contact your supervisor or system administrator.

   Disposition "Erase content" selected

2. In the *Notes* field, provide the reason for the request and enter additional details about the interaction. Then complete the interaction.

Use Notes to provide a reason for erasing content

3. The disposition will initiate a workflow that sends your system administrator an internal message with the request. The unique identifier tells the administrator which interaction is affected, and he or she can review the interaction and the request.

Example message delivered to the system administrator

How to Wrap Up After Call Work

Depending on the type of service you provide and your contact center practices, after a service interaction (call or chat) has terminated, the system may automatically change your state to *After Call Work* (ACW). You can use the time in this state to finish any work associated with the service interaction that has just ended.

After finishing the after call work for the current customer interaction, you have the following options:

- Click the **Complete** button . This will finish processing the current interaction. If this was the only interaction at your desktop, you will be automatically switched to the next state, which may be *Ready* or *Not Ready*, depending on the system settings and/or the state you may have previously requested. However, if you have other active interactions at your desktop, you may remain in the *After Call Work* state and continue working on the other interactions. Thus, when you handle multiple interactions simultaneously, it is recommended that you use the **Complete** button to finish interaction processing in the *After Call Work* state.
- If you are ready to receive another service interaction, you can click the **User Status Indicator/Selector** and select Ready from the drop-down menu. You will be switched to the *Ready* state regardless of how many interactions you may have had at your desktop. Processing of all such interactions will be finished.
- If you wish to make yourself temporarily unavailable to receive new service interactions, click the **User Status Indicator/Selector** and select Not Ready (or a specific reason) from the drop-down menu. You will be switched to the *Not Ready* state regardless of how many interactions you may have had at your desktop. Processing of all such interactions will be finished.

Complete button

You may be required to enter a disposition before finishing interaction processing. For more information, see How to Enter Dispositions and Notes.

Depending on the system settings, if you do not make yourself either *Ready* or *Not Ready* manually within the time allocated for after call work, the system may eventually switch you to the *Ready* or *Not Ready* state automatically.

Also, depending on your system settings, if there are other calls waiting in queue while you are in the *After Call Work* state, you may receive visual and audio notification of this fact.

Note: If you use a custom form in the *Context Information Area* for processing of data related to a specific call, the **Complete** button may appear on that form.

About Callback Reservation

If your contact center has virtual queue enabled, when working in Agent Desktop you may see the *Callback reservation* notice. This notice informs you that the system has placed you in a "reserved" state for the purpose of being connected to a customer who requested a callback; it is shown a moment before the system attempts the callback.

If the customer answers the callback, you will get the regular incoming call notification in a few seconds. Subsequent handling of this call should be no different from the handling of any regular inbound call for the given service. If the customer does not answer the callback, your "reservation" for this customer will be automatically canceled and you are likely to receive another inbound call shortly.

Note that the *Callback reservation* notice includes the optional checkbox **Don't show this to me again** should you not want to see the pop-up on future callback reservations.

For more information, see the *Virtual Queue Tutorial*, section How It Works.

An agent receiving a callback reservation notification

How to Host a Conference

A conference is a portion of a call where three or more parties can talk to each other simultaneously. You become a conference host when you connect a third participant to your regular two-party call.

There are two ways to connect a third participant to your two-party call: via a consultation call or single-step conference.

Connecting Via Consultation Call

To connect a third party via a consultation call, follow these steps:

1. Place your original call on hold and make a consultation call to the desired third party. SeeHow to Make a Consultation Call for more information.
2. After making sure that the consultation party is willing to participate in the conference, click the**Merge** button . (If you have two or more calls on hold, you will be asked to confirm whether you wish to conference all held calls with the consultation party.) Upon clicking the **Merge** button, all three parties will be able to talk to each other.

Note: If you change your mind about conferencing the primary call with the consultation party, then instead of using the**Merge** button, click the **End Call** button to finish the consultation call. Then click the**Retrieve** button to retrieve the primary call from hold and continue the conversation.

Merge button

Connecting Via Single-Step Conference

To connect a third party via a single-step conference, follow these steps:

1. Without placing the original call on hold, enter the number of the desired third party in the *Number Input Field* (or select it from *Directory*, *Recent*, or *Favorites*).
2. Click the drop-down icon next to the **Initiate call** button, and select the **Initiate single-step conference** button .
3. The dialing will begin immediately. Both you and the other party currently on the call will be able to monitor the progress of the dial attempt and engage in a three-party conversation as soon as the third party answers.

Note: If you have a call on hold prior to using the **Initiate single-step conference** button, it will not be connected to the dial attempt. Instead, a regular two-way call will be initiated to the desired number, while the original call will remain on hold. This is done to prevent the accidental merging of unrelated calls.

Single-step conference button

You can connect more than one party to your conference following the aforementioned procedures. All conference participants will be displayed in the **Contact Info Panel**.

Note that any other internal party connected to your conference will be able to add more participants to this conference. However, regardless of the number of participants or who connected them, you will continue to be the host of the conference call because you were the one who set up the original three-way conference.

Disconnecting

As the conference host, you have the following exclusive privileges: you can disconnect any individual participant from your conference at any time, and you can end the conference call for all participants in one step.

To disconnect an individual participant, hover over the participant's name in the **Contact Info Panel**, and click the disconnect icon that will appear next to the participant's name.

To end the conference call for all participants in one step, click the **End conference** button

Other participants can leave your conference at any time. You can only leave your own conference when it has three participants. To leave your conference, click the **Leave** button . You will be disconnected while the two remaining parties will carry on with a regular two-way call.

Note: When you connect a third party via a single-step conference function, all of the discussed conference controls become available to you as soon as the dialing begins. Thus, for example, you can leave the call without waiting for the third-party to answer.

How to Participate in a Conference

A conference is a portion of a call where three or more parties can talk to each other simultaneously. The party that turns a regular two-way call into a three-way conference by connecting a third participant becomes the conference host. (For more information about being a conference host, see How to Host a Conference Call.) The other two parties in such a three-way conference become regular conference participants.

Conference participants and Leave button

As a conference participant, you can do any of the following:

- See all other conference participants in the **Contact Info Panel** and talk to all of them.
- Add new participants to the conference.
- Leave the conference at any time.

Adding New Participants

To add a new participant to the conference, follow these steps:

1. Place your conference call on hold and make a consultation call to the desired new party. See How to Make a Consultation Call for more information.
2. After making sure that the consultation party can join the conference, click the **Merge** button .

Leaving a Conference

To leave the conference, click the **Leave** button . You will be disconnected while the remaining parties will carry on with the conference call.

The conference host can disconnect you from the conference at any time. The conference host can also end the conference for all participants in one step. For more information about conference host's privileges, see How to Host a Conference Call.

How to Make Consultations and Transfers

If your contact center accepts calls, occasionally you will need to transfer calls, conduct conference calls, or consult other agents or managers while on an active call. This article shows you how to use the *Consult, Conference, Blind Transfer* feature while on an active call.

How the Consult, Conference, and Blind Transfer window looks in Agent Desktop

Consult, Conference, Blind Transfer Window

Consult, Conference, Blind Transfer is the window that pops open after clicking on the **Initiate transfer or conference** button during an active call.

The "Initiate transfer or conference" button in the list of phone controls

From this window, you may do the following:

- Scroll down and select a recipient from the list of available agents.
- Use the search bar to enter the name or number of the agent you want to transfer the call to.
- In the number field, enter the phone number or extension of the party you are transferring the call to.

The Consult, Conference, and Blind Transfer window

Consultation Calls

A *consultation call* is a call you make to another agent or manager with respect to an active customer call on your desktop. Making consultations allows you to ask others questions while keeping your caller on hold.

To make a consultation call, click on the **Initiate transfer or conference** button; this pops the Consult, Conference, Blind Transfer window. After the extension or phone number is entered in the number field, click on the dropdown menu and select the **dial** button; you will dial the phone number or extension in the number field but the call will not be transferred.

Please note that you can complete a transfer after making a consultation call on either consultation call, or the original call. When you complete a consultation call with a transfer while having the original call active, the remaining call will carry the original call's service for the reporting purposes.

Conference Calls

A *conference call* is a call where more than one party is actively on a call; conference calls can be useful if your caller wants to speak with a manager.

To make a conference call, click the **Initiate transfer or conference** button; this pops the Consult, Conference, Blind Transfer window. After the extension or phone number is entered in the number field, click on the dropdown menu and select the **dial as conference** button. From here, all parties will be active on the call.

Recent conference calls can be seen in the *Recent* list, displayed as the word "Conference"; when you hover your cursor over the word, the contact cards of all parties on the call are displayed.

A recent conference call

Blind Transfers

A *blind transfer* is when an agent passes a call to another phone number or extension without knowing if the call will be actively received. Blind transfers are useful when callers need to speak with specific agents or departments.

To initiate a blind transfer, click on the **Initiate transfer or conference** button; this pops the Consult, Conference, Blind Transfer window. After the extension or phone number is entered in the number field, click the **blind transfer** button; the phone call will transfer and the interaction will be completed.

For blind transfers, the name and phone number of the caller will be displayed and stored in the**Recent** list.

Keyboard Shortcuts

Note that conference calls, consultations, and blind transfers can be made using keyboard shortcuts, also known as hot keys or hotkeys.

The keyboard shortcuts are as follows:

- First, to initiate a transfer or conference, select **Alt-Shift-T**
- To make a blind transfer, select **Alt-Shift-B**
- To make a consultation call, select **Alt-Shift-D**
- To make a conference call, select **Alt-Shift-C**

How to Consult a Fellow Agent's State Before Transferring an Interaction to Them

If real-time state icons are enabled for your contact center, they are viewable in your directory as well as in the following:

- The Consult, Conference, and Blind Transfer dialog windows
- The Chat Invite dialog window
- The Transfer Email and Assign Email dialog windows

If you are processing an interaction and need to transfer it to another agent, you can use the icons to determine who is available to transfer the interaction to.

Note: If real-time state icons are not enabled for your contact center, the same process may be used withpresence icons.

General Rule

Ideally, the best agents to transfer interactions to are in the Ready state. This state means an agent is ready and waiting to process interactions (i.e., they are not actively working on anything else).

Agents in various states

Check the Directory

The directory is one of the places to view agent real-time states. You can access the directory by clicking theconversations icon or the directory and dial pad icon. To view agents, click on the various team names (e.g., Customer Service).

In the following image, three out of four of the displayed agents are busy or logged out. If you needed to transfer an interaction to one of these agents, Antonio Staten would be the best choice because he is Ready.

Agent Antonio Staten is in the Ready state

In the following image, all three agents are busy (i.e., two are on active calls and one is at lunch). If you needed to transfer an interaction to one of these agents, you could inform the customer they will need to wait for the next available agent, send an internal message to the desired agent, and then transfer the customer when the agent is ready.

Checking agent states lets you know when your coworkers are unavailable

Check the Transfer Dialog Window

If you are actively processing an interaction, the various transfer dialog windows display real-time states too. In the following image, agent Christy Borden called her coworker Beverly Dunton to ask her a question. Unfortunately, Beverly does not know the answer and she wants to see who is available to transfer Christy to.

When Beverly clicks the **Initiate transfer or conference** button the Consult, Conference, Blind Transfer dialog window pops, allowing her to see that agent Liza Smith from the Customer Service team is available.

Real-time states can be seen from transfer dialog windows

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 sectionHow 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.

How to Use Favorite Contacts

If agents have the privilege **Use Favorites tab**, agents can mark contacts as favorites, so that the most-called customers remain accessible while agents are working in Agent Desktop.

Storing Contacts

You can store up to 50 frequently called contacts in your personal Favorite Contacts list.

To store a contact in your Favorites, follow these steps:

1. Select the desired contact from the *Directory* or *Recent* tab, or enter it manually in the *Number Input Field.* The contact will appear in the *Contact Info Panel*.
2. Hold your cursor over the contact's name in the list, and click the button that appears. The button will change its appearance to .
3. If this is an existing contact from the Directory, it will be immediately added to your personal favorite contacts . Note that you cannot change the names of directory contacts.
4. If this contact is not from the directory, you may add the contact as a new record by providing a name, photo, and email address (if any). Note that if you do not enter a display name for the contact, the name will be shown as "Anonymous" by default.

Adding a contact to Favorites

Adding and Updating Contacts

You can also add a contact to your favorites while having an active call or chat with this contact.

You can change information about your favorite contacts (unless they are Directory contacts) at any time. To change the information, select the contact and click **Edit**.

Calling Your Personal Favorites

To make calls to the contacts in your personal favorite contacts list, follow these steps:

1. Click the *Favorites* tab.
2. Select the contact you wish to call. The contact will appear in the *Number Input Field*.
3. If necessary, select the service as described in section How to Make an Outbound Call.
4. Click the **Initiate call** button.

Removing Favorites

To remove a contact from your favorites, select it in the *Favorites* tab and click the button in the *Contact Info Panel*.

How to Schedule a Follow-up Activity

While talking to a customer or colleague, you can schedule follow-up activities related to your present call. For example, you can schedule an outbound call or email to confirm fulfillment of a customer's request.

To schedule a follow-up activity in the context of your current interaction, follow these steps:

1. In the *Contact Info Panel*, click the **Schedule follow-up activity** button . The dialog window and calendar that appear will have the available contact information (e.g., name and phone number) pre-filled for you.
2. Add missing contact information (e.g., email address) if necessary.
3. Enter the activity **Title** and **Notes**.
4. Specify the activity **Start** and **End** time, and set the **Reminder**.
5. Click **Save**.

Scheduled activities will appear in your personal calendar, and you will get reminders when those activities are due. For general information about the calendar and reminders, see section How to Open the Calendar.

Follow-up activity details

How to Hold and Retrieve a Call

You can place an active call temporarily on hold in order to do some work related to this call without releasing it.

There are two ways to do that:

- To place a call on hold, click the **Hold** button .
- Click the Hold icon in the *Active Communications List*.

The *Active Communications List* will continue to display the call on hold as an active call. The *Held* status of this call will be indicated by the hold icon . The Hold button will change its appearance to Retrieve .

Hold button

There are two ways to retrieve the call from hold and continue the conversation:

- Click the **Retrieve** button .
- Click the **Hold** icon in the *Active Communications List*.

How to Mute a Call

During a conversation, you can use the **Mute** button to disable your microphone temporarily. Muting prevents the other party on the call from hearing your voice and background noise.

To mute call, follow these steps:

1. Click the **Mute** button once to mute the call. The **Mute** button will change its appearance to and the same mute status icon will appear next to the call timer in the Active Communications List.

1. Click the **Mute** button again to unmute the call.

You can also use the **Alt-X** keyboard shortcut/hot key to mute/unmute the microphone.

How to Release a Call

At the end of the conversation, a call can be released by either yourself or by the other party on the call. If the other party terminates the call, you do not need to do anything in order to release this call on your side.

There are several ways to release the call from your side:

- Click the **End call** button .
- Click the **X** icon that appears when you mouse over this call in the *Active Communications List*.
- Use the **Alt-Q** keyboard shortcut/hot key to release the current call.

End call button

If after-call work is used for the service associated with the release call, the *Contact Info Panel* will show the status of this call as *Wrap-up*, and the *User Status Indicator/Selector* will indicate that you are in the After Call Work state. Otherwise, you will be immediately switched to Ready or Not Ready, depending on the system settings and/or the state you may have previously requested.

How to Make an Internal Call

Internal calls are calls you make to other agents and supervisors of your call center, as well as other employees that may be connected to your phone system.

Follow these steps to make an internal call.

1. In the *Number Input Field*, enter the extension number of the party you would like to call. To enter the number, you can use either the *numeric keys* of your keyboard or the **Dial Pad** tab . Note that you can also use the Recent Contacts, Directory, and Favorites to make calls to known internal contacts. In addition, you can click the click-to-call icon that appears next to contacts in your directory upon mousing over the contact's name.
2. If the internal call you are making is associated with a particular service that you provide, click the drop-down menu below the *Number Input Field*, and select the desired service. Otherwise, choose **None**.
3. Click the **Initiate call** button .

Number input field, Service selector, and Initiate call button

If the called party is available, you will hear the ring back tone in your headset, and you will see a blinking outgoing call icon in the *Active Communications List*. When the called party answers, the outgoing call icon will stop blinking, indicating that the call is now established.

Note: Depending on your previous actions, instead of the **Initiate call** button, you may see the **Initiate single-step conference** button. This button is used to set up a conference with another active call on your desktop. In absence of another active call, this button can be used in the same way as the **Initiate call** button.

How to Make an Outbound Call

Outbound calls are calls you make to external numbers of a public telephone network.

Follow these steps to make an outbound call.

Step 1: Enter phone number with prefix (if necessary)

In the *Number Input Field*, enter the full telephone number of the party you want to call.

To enter the number, you can use either the **numeric keys** of your keyboard or the *Dial Pad* tab. Note that if you begin entering a phone number that you have manually entered and dialed previously, the system will automatically complete the rest of the phone number for you. You can also use the Recent Contacts, Directory, and Favorites to make calls to known outside contacts.

Number Input field and Dial Pad

Prefixes

Depending on your contact center configuration, you may also have to enter a prefix (e.g., "1") for access to the public telephone network before entering the telephone number itself. Sometimes, you may be required to dial different prefixes depending on the destination. You should receive instructions about the use of prefixes from your administrator.

Prefix "1" and phone number in Number Input field

International Calls

To dial internationally, enter the plus ("**+**") sign and phone number. To enter the plus sign from the Dial Pad, click and hold the "**0**" button.

Plus sign and phone number in Number Input field

Depending on your contact center configuration, you may have to enter prefix "**011**" instead of the plus sign.

Prefix "011" and phone number in Number Input field

Step 2: Select service

If the outbound call you are making is associated with a particular service that you provide, click the drop-down menu below the*Number Input Field* and select the desired service. Note that depending on your system configuration, a service may be automatically associated with the call based on the prefix of the number that you dial. If you are in doubt as to which service to attribute this call to, choose **None**. Consult your administrator for more specific instructions regarding service selection.

Service selector

Step 3: Click the Initiate call button

Click the **Initiate call** button .

If the called party is available, you will hear the ring back tone in your headset, and you will see a blinking outgoing call icon in the *Active Communications List*. When the called party answers, the outgoing call icon will stop blinking, indicating that the call is now established.

Note: Depending on your previous actions, instead of the **Initiate call** button , you may see the **Initiate single-step conference** button . This button is used to set up a conference with another active call on your desktop. In absence of another active call, this button can be used in the same way as the **Initiate call** button.

How to Speed Dial Through External IVRs

Part of making outbound calls means having to sometimes navigate through IVRs. An IVR, or interactive voice response, is a phone menu that requires you to either speak or press phone keys to react to computer system prompts; entering in the appropriate prompts ultimately guides your call to the desired contact. IVRs are useful to companies for managing incoming calls, but as a caller, they require extra time and effort on your part to handle.

When making calls to a contact through an IVR, Agent Desktop allows the comma symbol (i.e., “,”) to be added to phone numbers and extensions entered in the number input field. Each comma represents a one-second pause the system takes before entering the next DTMF key (i.e., 1-9, #, *); multiple commas may be configured consecutively for a longer pause. So, if you know what prompts need to be entered, including pauses allows you to effectively speed dial through the IVR.

How to Configure and Save Phone Numbers with Pauses

In the number input field, comma symbols may be added at the end of a regular number or extension and then between subsequently dialed DTMF keys. Examples of dialed numbers with pauses can look like the following:

- 18005556677,,,1,,4
- 16506046789,,1,1234567890#
- 1002,3,2

How a phone number with added pauses looks in the number input field and the Recent list

Phone numbers and extensions dialed with comma symbols will appear in Agent Desktop's Recent list and can be saved to contact records with the symbols included.

Creating a new contact with the altered phone number

After saving a specifically dialed phone number to a contact record, all future outbound calls to this contact will include the pauses, allowing you to bypass IVR prompts and reach the contact sooner.

How a saved contact with the altered phone number looks

How to Connect a Voice Application to Your Call

Some types of contact center services may involve connecting an interactive voice response (IVR) application to your conversation with the customer. Such applications can be used, for example, to authenticate customers using their personal identification numbers or collect payment card information.

Connecting Applications

To connect an IVR application, follow these steps:

1. Place your original service call on hold.
2. Select the desired application from the **Directory** or enter its number in the *Number Input Field*.
3. Click the **Call** button.
4. Once the IVR application is connected, click the **Merge** button to set up a conference. You will see both the customer's name/number and the name of the IVR application in the **Contact Info Panel**.

Note: Because the application will be connected to your service call in the conference mode, you will continue to be an active participant of this call. To let the IVR application and the customer communicate without any possible audio interference, consider muting your microphone for the duration of customer's interaction with the application.

Disconnecting Applications

Under normal circumstances, the IVR application will disconnect from the conference automatically after finishing its function (e.g., after playing all the required voice prompts and/or collecting all the necessary data). However, in case of any difficulties (e.g., the customer is confused about the prompts and needs more instruction), you can disconnect the IVR application at any time.

To disconnect the IVR application, mouse over its name in the *Contact Info Panel*, and click the red disconnect icon. You can now talk to the customer, provide the necessary instructions, and connect the IVR application again when the customer is ready.

For more information about conference controls, see How to Host a Conference Call.

How to Record a Call

Depending on your permissions, you may be able to activate call recording. Your system administrator will provide instructions for when call recording may be necessary or advisable. You can start recording at any time during your phone call.

If you have permission to record calls, the *Contact Info Panel* will display the call recording button during an active call.

To start recording a call, click the call recording button. The recording will begin from that moment, and the button appearance will change to show the **stop** control .

Depending on your permissions, once the recording starts, you may not be able to stop it. In this case, the recording button will be disabled, and the entire conversation from the moment of recording activation will be recorded.

Note: Many services are configured to record some or all calls automatically from the moment you receive and/or make them. If a call is being recorded automatically, the call recording button will show the **stop** control from the moment the call is established.

How to Stop Call Recording

Depending on your permissions, you may be able to completely stop the recording of a call (e.g., per a customer request) or stop it temporarily (e.g., in order to prevent some sensitive data from being recorded). Your system administrator will provide instructions for when call recording may have to be stopped. You can stop and restart recording at any time during your phone call.

If a call is being recorded, the call recording button will show the **stop** control .

To stop the recording of the call, click the button. The recording will stop from that moment, and the button appearance will change to show the **start** control . To resume recording at any time, click the button.

How to Use Prerecorded Messages

Depending on your contact center practices and the services that you provide, you may be required to repeat the same information during each call (e.g., a standard company greeting or a policy advisory). Such standard messages can be prerecorded and then played back to the customer during a call.

Some prerecorded messages can be preconfigured by your system administrator with respect to various services provided by your contact center. In this case, when you handle a call associated with a specific service, messages preconfigured for this service will be made available for selection via *Contact Info Panel*.

Creating Messages

You can define your personal prerecorded messages and record them using your own voice.

To create a personal message, follow these steps:

1. Prepare the text of your message.
2. Put on your headset.
3. Click **Settings** . Note that if you have uploaded a user profile photo, your photo is used in place of the Settings icon.
4. Select **Pre-recorded Messages**.
5. In the dialog window that appears, click the "**+**" button.
6. In the window that appears, specify the message **Title** (e.g., *My regular voicemail message.*)
7. Click the **Start recording** button . You will hear a single ringing tone, which indicates the beginning of the recording. The button appearance will change to show the **stop** control .
8. Speak your message into the microphone. When you are finished, click the **Stop recording** button .
9. Check your recorded message by clicking the **Play file** button . If you are not satisfied with the way the message sounds, repeat step 6 and step 7 of this process.
10. Click **Ok** to confirm.

Creating a personal prerecorded message

Standard Greetings

You can designate one of your prerecorded messages as a standard greeting that will be played to customers automatically as soon as you answer their calls (e.g., *Welcome to ... My name is ... How can help you today?*). You should only use such an automatic greeting if you actually use the same way of greeting your customers on all service calls that you handle.

To create such a greeting, follow these steps:

1. When reviewing your message, select the **play automatically on all service calls** checkbox.
2. When you click **Ok** to confirm, the message will appear marked as **(default)** in the message list.

Reviewing and Editing Messages

You can review your messages, change their titles, and re-record the content whenever you like.

To review and/or edit an existing prerecorded message, follow these steps:

1. Navigate to *Settings* > *Pre-recorded Messages*
2. Select the message you wish to edit
3. Click the **edit** button .

Note: Instead of recording your personal messages via the Agent Desktop application, you can record them offline and store them as audio files. The process of configuring your greetings is the same, except instead of recording controls, you click the **Upload** button and select the desired audio file.

Playing Messages During a Call

If there are any prerecorded messages defined either at the service level or for your personal use, a message selector will appear in the *Contact Info Panel* when you have a connected call.

Pre-recorded message playback

To play a message to the other party on the call, follow these steps:

1. Select the desired message from the drop-down menu. If you do not see the desired message in the drop-down menu, click **more...** A separate dialog window will appear listing all available messages in two groups: *Canned Prompts from Service* and *Personal Pre-recorded Messages*.
2. Click the **Play file** button .
3. Playback of the selected message will begin. You will be able to hear the message being played. You can continue the conversation with the other party normally after the message playback ends.
4. If you wish to stop the message before the end of the playback, click the **Stop** button. You can continue the conversation with the other party normally after stopping the message.

Using a Pre-recorded Message As a Voicemail

You can use the message playback function to leave a prerecorded message on the called party's answering machine. In this case, you can disconnect yourself from the call immediately after activating the message playback.

To leave a prerecorded message on the other party's answering machine, follow these steps:

1. Select the desired message as described, and wait for the invitation to leave a message.
2. Click the **Play file** button . Playback of the selected message will begin.
3. Click **End Call** at any time to disconnect yourself from the call.

Playback of the prerecorded message to the called party's answering machine will continue until the message ends and the call will then be disconnected automatically.

Voice Signatures

Depending on the type of services that you provide to your customers, you may be required to collect their voice signature during your phone calls with them. Voice signature refers to use of customer's voice, by way of recording answers to a predefined set of questions, as a legal signature with respect to a policy or contract discussed on the call. This section contains general information about the voice signature collection process and the functions of the Agent Desktop application that may be involved in it. You should receive detailed instructions for collection of voice signatures in the context of various services that you provide from your system administrator.

A call involving voice signature collection normally consists of two stages. During the first stage, you discuss the details of the contract with the customer and make sure that the customer is willing and ready to sign it via voice. Once the customer confirms consent and readiness, the second stage begins where the customer answers a set of standard questions, while you make sure that the answers are acceptable. If you are satisfied with the answers, you flag the call as one containing the customer's voice signature. This voice signature flag will be stored in the call details and can be used later to extract, store, and quickly find the corresponding voice recording.

Note: Collection of voice signature during a call only makes sense if the call is being recorded. Thus, any service involving voice signature collection will be configured to record 100% of the calls. You do not need to activate recordings for calls associated with such services manually.

Methods of Voice Processing

The process of voice signature collection can be facilitated using one of these two methods:

Using a Set of Prerecorded Prompts Configured by Your System Administrator for the Corresponding Service

If this method is used, a menu of such prompts will appear in the*Contact Info Panel* when you either make or receive a call associated with the given service. The order in which the messages must be played will be determined by your system administrator.

When you are ready to begin the process of voice signature collection:

- Select the first message from the menu.
- Activate the playback.
- Wait for the customer response.
- Repeat for all prompts that are part of the voice signature collection process.

For more information, see section [How to Use Pre-recorded Messages](#).

Connecting a Voice Application to Your Call

In this case, your system administrator will provide the name and directory location of the application that should be connected when you are ready to begin the process of voice signature collection for the given service. Once you have connected the application, it will play all the necessary prompts to the customer, pausing after each prompt for a few seconds to give him an opportunity to respond. For more information, see section [How to Connect a Voice Application to Your Call](#).

Once the voice signature collection is over and you are satisfied with all customer responses, select the**voice signature** checkbox to indicate that the recording of this call contains a voice signature. This checkbox may be located either in the *Contact Info Panel* or on the custom form that you see in the *Context Information Area*.

Voice signature checkbox

How to Redial a Previously Dialed Number

You can redial any of the up to a hundred of your most recent calls, which includes both users and[contacts](#).

You may redial both users and contacts

To redial the last dialed number, follow these steps:

1. Click the **Initiate call** button . The last previously dialed number will appear in the*Number Input Field*.
2. If necessary, select the service as described in sectionHow to Make an Outbound Call.
3. Click the **Initiate call** button again to connect to this number.

To redial one of the previously dialed numbers:

1. Click the *Recent* tab.
2. Select the number from the list that appears. The contact will appear in the*Number Input Field*.
3. If necessary, select the service as described in sectionHow to Make an Outbound Call.
4. Click the **Initiate call** button.

Note: You may also initiate a redial by hovering over the user or contact record until the info card appears, then click the phone icon.

Recent contacts

The previously dialed numbers in the *Recent* list will be marked with the outgoing call icon .

This list also contains the following:

- Records of successful incoming calls
- Missed calls
- Chat sessions
- Emails

Overview: Using Remote Assistance During Calls

When remote assistance integration is enabled for your contact center, you can provide remote desktop/mobile device support to customers during conversations. That means having authorized access to the customer’s device screen, having navigational control, and being able to type and make changes on their device during an active interaction. Remote assistance makes it easier to provide troubleshooting and help.

Requirements

At this time, Bright Pattern Contact Center supports remote assistance via integration with LogMeIn Rescue, which requires the following:

- LogMeIn Rescue integration must be enabled for your contact center.
- You, the agent, must be an authorized technician and user of the LogMeIn Rescue Technician Console application.
- Your contact email address for Bright Pattern Contact Center must match the email address for your LogMeIn Rescue account.

Tutorials

The following articles will guide you through some of the ways that you can use remote assistance during phone calls:

- How to Start Remote Assistance During a Phone Call
- How to Transfer a Call with an Active Remote Assistance Session

How to Start Remote Assistance During a Phone Call

During a phone call with a customer, you can provide immediate hands-on help with the click of a button. The following procedure describes what you and the customer will do to start a remote assistance session via LogMeIn Rescue on either a desktop or mobile device.

Procedure

1. Make sure you are logged in to the LogMeIn Rescue Technician Console.
2. While on a service call, click the **Start remote assistance** button.

   During an active service call, click "Start remote assistance"

3. The *Remote Assist Session* dialog will be popped to Agent Desktop. This window displays the following:
   1. **The Numeric PIN code** (e.g., "123456") - The PIN is needed for starting the remote assistance session.
   2. **Create Another PIN** - Clicking this button will generate a new PIN number.
   3. **URL for manual PIN input: oty.com** - This is the URL that the customer will use for entering the PIN code.
   4. **Close** - Clicking this button will close the Remote Assist Session dialog, removing it from your Agent Desktop screen.

Example of the Remote Assist Session dialog

4. Instruct the customer to type the URL into the address bar of their web browser and enter the PIN number.

5. Once the customer has successfully entered the PIN number on that page, then the LogMeIn application for either desktop devices (Mac/Win) or mobile devices (Android/iOS) will either be downloaded or will be opened in the App Store or Google Play for downloading.

What Happens Next

If the Customer Is on a Desktop Device

1. The page will open for the customer and will begin downloading the *Support-LogMeInRescue* application (Mac/Win). The customer will then open the app and give the required permission.

2. At the same time, you, the agent who is logged in to the LogMeIn Rescue Technician Console, will receive a sound notification in the console, and you will see that there is a new remote desktop session with status "Waiting."

3. Select the session in the application and click **Start Session**.

4. Then select either **Remote control session** to control and make changes to the customer's desktop, or **viewing session** to observe the customer's desktop only.

5. The remote assistance session is established.

6. During the remote assistance session, you and the customer can continue talking on the phone.

If the Customer Is on a Mobile Device

1. The LogMeIn *Rescue + Mobile* app will be shown in the App Store or Google Play. The customer should download and launch the app. Then, the customer will enter the PIN manually.

2. At the same time, you, the agent who is logged in to the LogMeIn Rescue Technician Console, will receive a sound notification in the console, and you will see that there is a new remote desktop session with status "Waiting."

3. Select the session in the application and click **Start Session**.

4. The remote assistance session is established, and you can then observe the customer's mobile device screen only. For mobile devices, you cannot control or make changes.

5. During the remote assistance session, you and the customer can continue talking on the phone.

How to Transfer a Call with an Active Remote Assistance Session

You can transfer a phone call to another user without interrupting an active remote assistance session. To use this capability, the user you are transferring the call to also must be an authorized LogMeIn Rescue technician and that user's email address must match the LogMeIn Rescue email address on the account.

1. While on a phone call and a remote assistance session is already established, transfer the call as you normally would.

2. When the other user accepts the call, complete the call.

3. Upon completion of the call, the remote control session will continue and will be transferred to the other agent.

How to Send Numeric Information

When making an outbound call to a business number, you may sometimes be connected to an interactive voice application and asked to enter some numeric information. For example, you may need to enter the party's extension or select one of the available service options.

To enter numeric information, click the **Dial Pad** tab . Click the desired digit or a combination of digits.

You can also use the numeric keys of your computer keyboard to produce numeric tones when the Dial Pad tab is selected.

How to Place a Call in a Service Queue

Sometimes you may have to transfer a service call to a queue. This may be necessary, for example, if the caller has mistakenly selected a wrong service option during the interactive voice response (IVR) phase of the call, and you need to redirect his call to the team that can better help with his service request. Transfers of calls to service queues are called blind or single-step transfers because they do not involve consultation calls.

Blind Transfer

To make a blind transfer, follow these steps:

1. Select the desired queue from the **Directory** or enter its number in the *Number Input Field*.

2. Click the **Blind** button .

Note that depending on your contact center configuration, you may be able to see the current status of the queue in the Directory.

Upon completion of a blind transfer, the call will be placed in the selected service queue and you will be disconnected from this call. The call will disappear from your *Active Communications List*, and your state will change from *Busy* to *Ready*.

Note: Blind transfers to specific agent's extensions are also possible and can be used, for example, when the caller prefers to speak to a particular person and does not mind leaving a voicemail message if that person happens to be unavailable to take his call.

1. ↑ Entered characters/strings are processed in the following manner:
   - Standard DTMF symbols (1,2,...0, # and *) are:
     - displayed without changes
     - sent as DTMF tones to the remote party immediately in the same sequence as they were entered
   - Letters of the Latin alphabet (both lower and upper case) are:
     - converted to the corresponding DTMF symbols (a,b,c,A,B,C = 2; d,e,f,D,E,F = 3; etc.)
     - displayed as DTMF symbols
     - sent as DTMF tones to the remote party immediately in the same sequence as they were entered
   - Commas:
     - are displayed without changes
     - delay the sending of subsequent symbols for one second
   - Any other characters are disregarded (i.e., neither displayed nor processed in any other manner)