



5.8 How to Make Consultations and Transfers

Bright Pattern Documentation

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How to Use the Directory

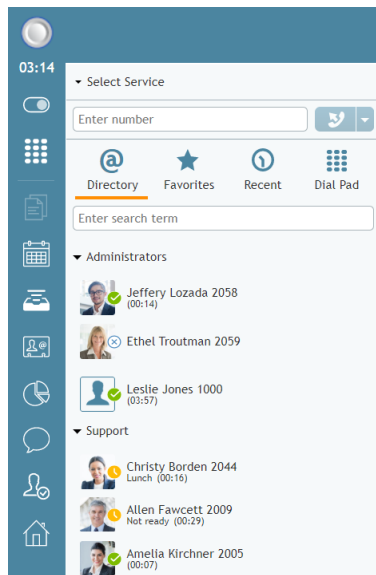
You can contact users registered in your contact center by selecting them from the Directory tab. The directory displays users in your organization grouped by teams. It may also show service queues and some frequently used external numbers.

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



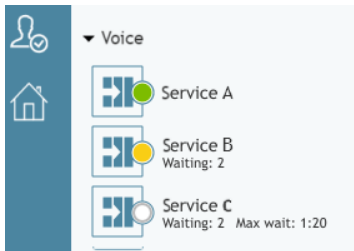
The user is in the [Supervising](#) state.

Logged Out



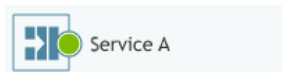
The user is logged out.

Service Queue Icons



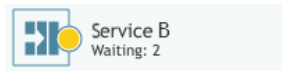
Example of queue icons shown in the directory

Logged in, Ready



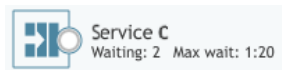
For this service, one or more agents are currently in the [Ready](#) state. The availability icon is shown in green. If any additional service metrics are [configured to be shown in the directory](#), those metric names and values are shown next to the availability icon.

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.

How to Use the Directory

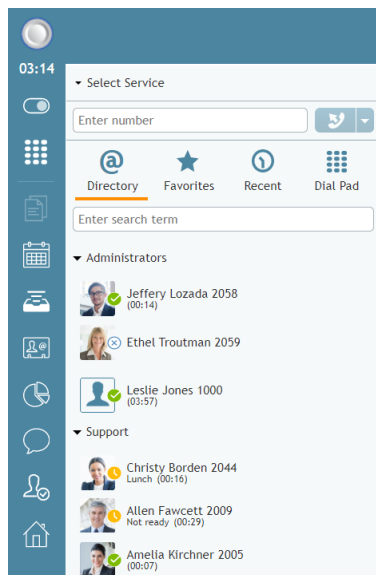
You can contact users registered in your contact center by selecting them from the Directory tab. The directory displays users in your organization grouped by teams. It may also show service queues and some frequently used external numbers.

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](#).
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- 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



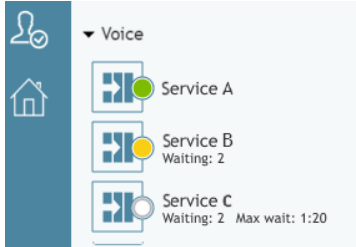
The user is in the [Supervising](#) state.

Logged Out



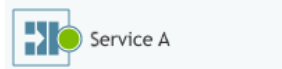
The user is logged out.

Service Queue Icons



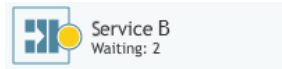
Example of queue icons shown in the directory

Logged in, Ready



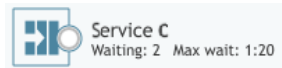
For this service, one or more agents are currently in the [Ready](#) state. The availability icon is shown in green. If any additional service metrics are [configured to be shown in the directory](#), those metric names and values are shown next to the availability icon.

Logged in, Not Ready



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How to Use the Directory

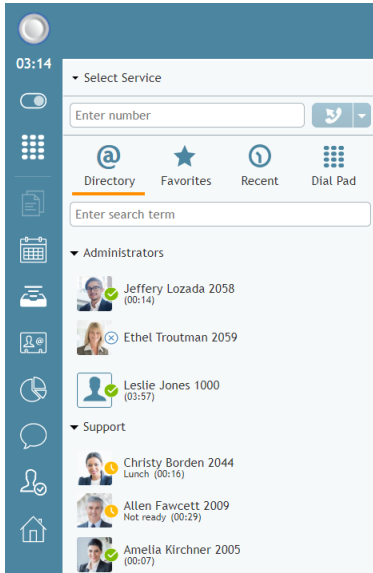
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Busy

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**
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- **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



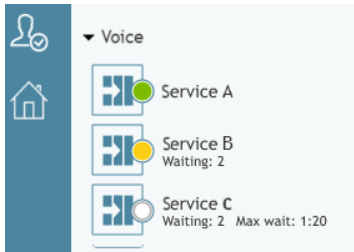
The user is in the [Supervising](#) state.

Logged Out



The user is logged out.

Service Queue Icons



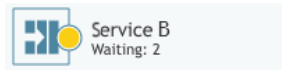
Example of queue icons shown in the directory

Logged in, Ready



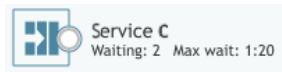
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Logged in, Not Ready



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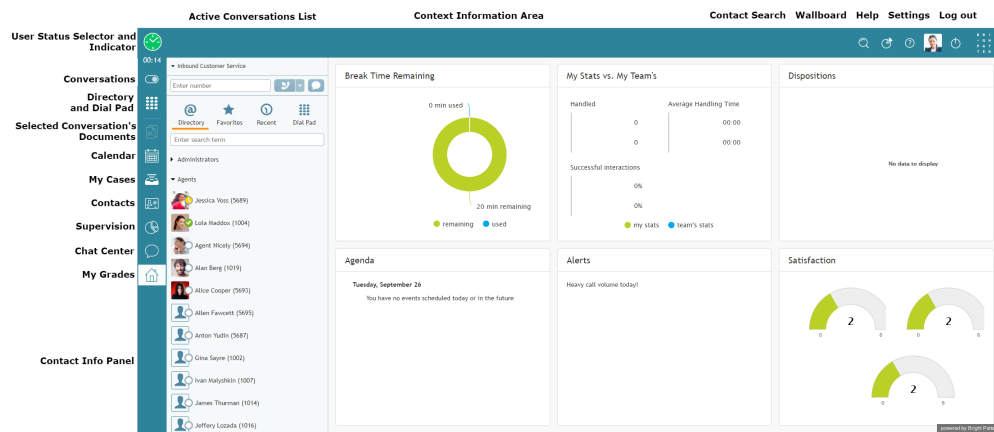
Logged out



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.

Agent Desktop User Interface

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



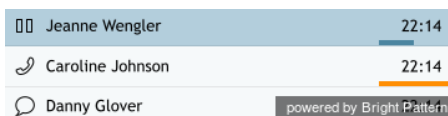
The elements of Agent Desktop

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

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

Active Conversations List (ACL)

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



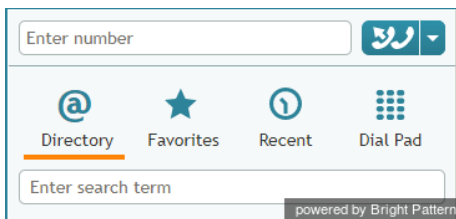
Active Conversations List

Contact Info Panel

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

The Contact Info Panel contains the following:

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



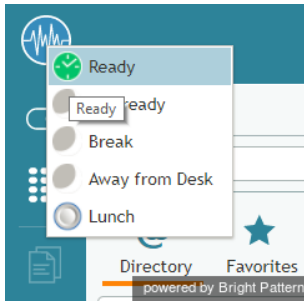
Contact Info Panel

User Status Indicator/Selector



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

For more information, see section [Understanding and Handling Your States](#).



Changing your agent state

Timer

00:01

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

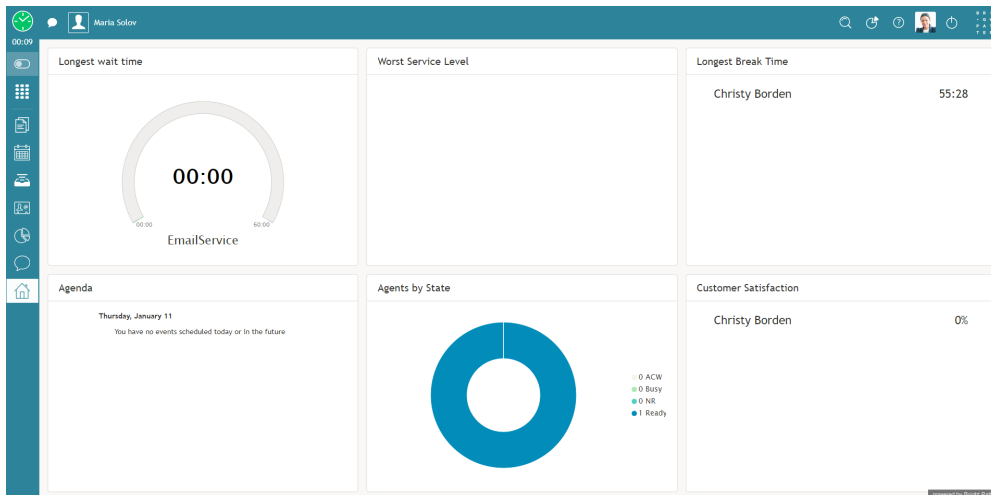
Conversations



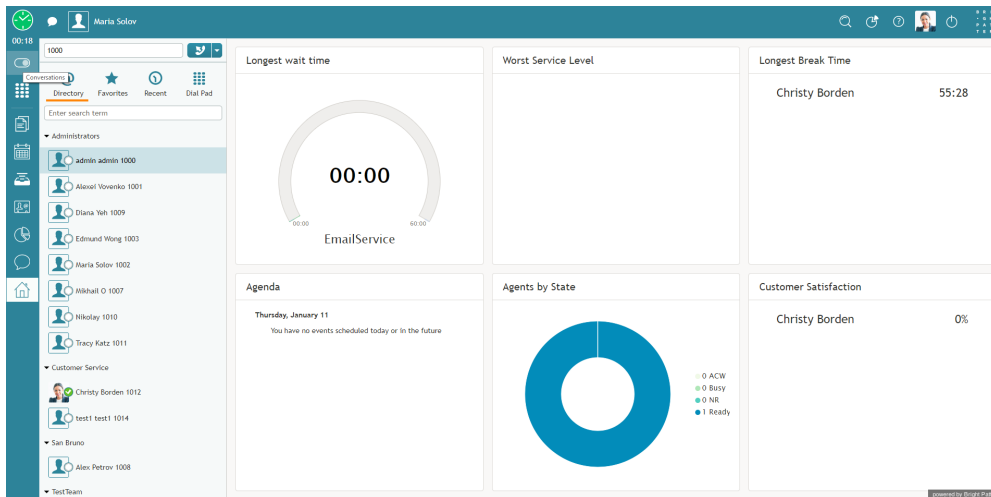
To show or hide the Active Conversations List in the Context Information Area, click the *Conversations* icon. When the Active Conversations List appears, you can access the Directory, Favorites, Recents, and Dial Pad.

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

Notice the difference between the two Agent Desktop views shown.



Click the Conversations icon to display the Active Conversations List



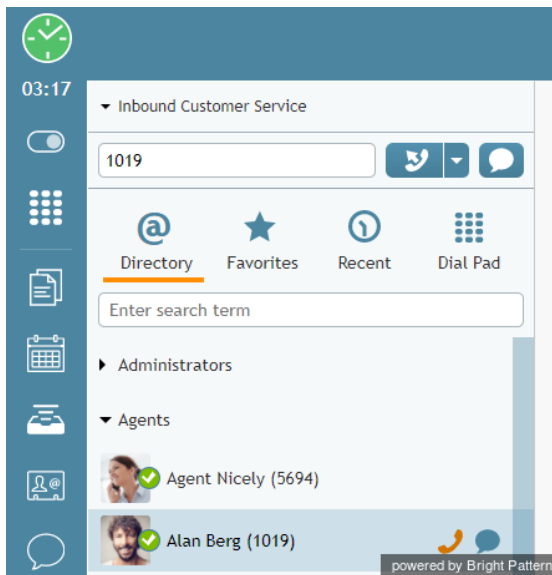
The Active Conversations List appears on the Agent Desktop

Directory



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

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



Making an internal call

If your contact center integrates with [Microsoft Teams](#) for company messaging and internal communications and you are [signed in to your Microsoft account](#), you may notice Teams-related items in the Agent Desktop directory, such as the following:

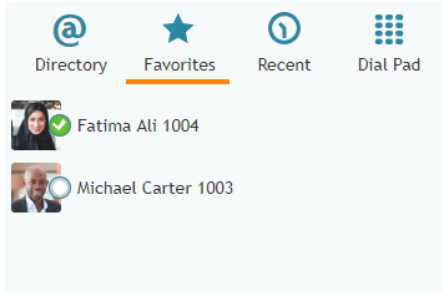
- [Microsoft Teams Channels](#) folder
- [Microsoft Teams Chats](#) folder
- Teams user personnel listed inside either the Microsoft Teams Channels folder or the Microsoft Teams Chats folder
- The user presence of Teams user personnel

Teams folders are only shown in the directory when Microsoft Teams integration is enabled for your contact center and you are signed in to Microsoft via your User Profile settings.

Favorites

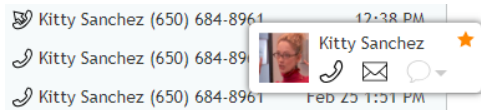


The *Favorites* tab contains your personal list of frequent contacts; favorites may be both internal and external. Mousing over a Favorite contact's name causes the phone icon and the chat icon to appear. Clicking on the phone icon will initiate a call to that user. Likewise, clicking on the chat icon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



Your favorite contacts

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

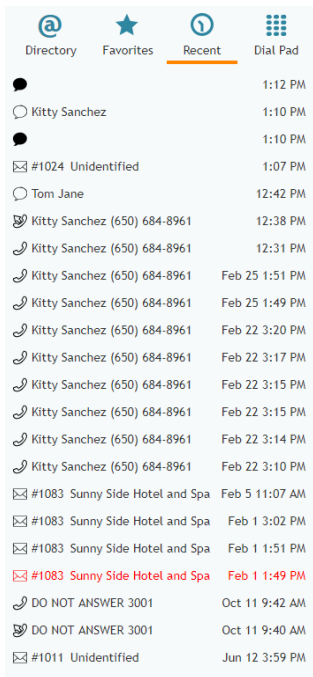


Add a contact to Favorites

Recent



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



Recent list

Dial Pad



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



Dial Pad

Directory and Dial Pad

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

The Directory and Dial Pad button has two different looks.

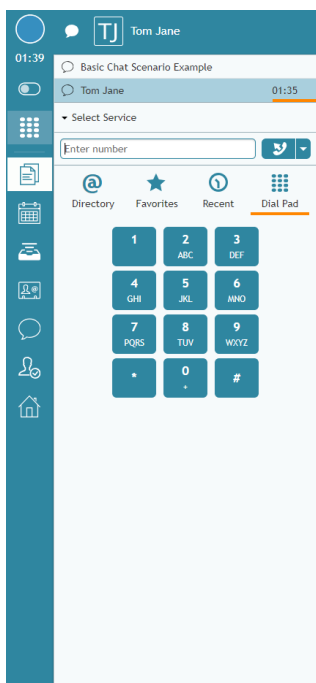
The first is a filled dial pad grid.



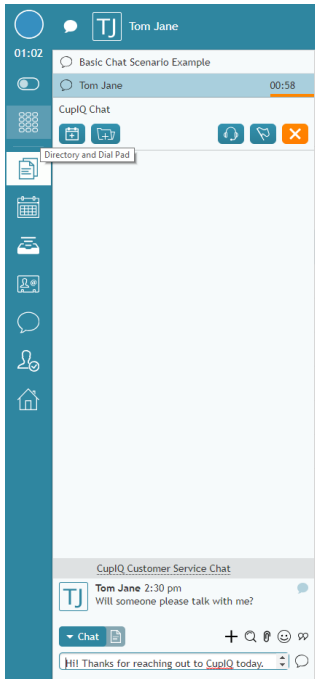
The second is an empty dial pad grid.



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

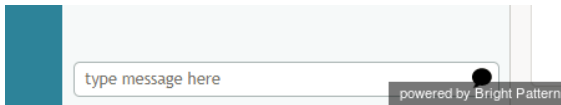


If the Conversations area is open and the button is displayed as an empty dial pad, clicking on it will display any active interactions (e.g., an active chat session). Any other active interactions will be displayed in the Active Conversations List. If the Conversations area is closed, mousing over the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



Text Input Field

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



Type your message in the Text Input Field

Selected Conversation's Documents

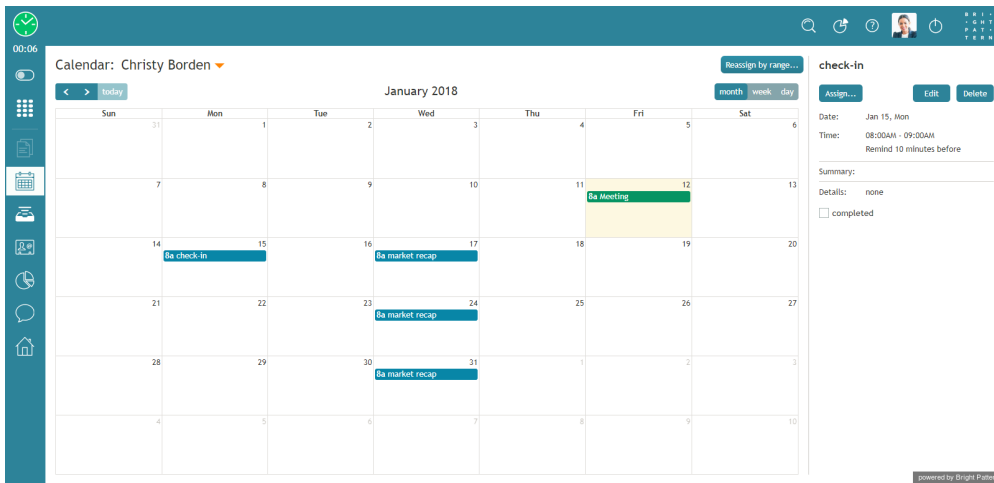


If a conversation or case has been selected on the Agent Desktop, the email messages, chat messages, or other documents associated with the conversation will be displayed in the Context Information Area.

Calendar



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

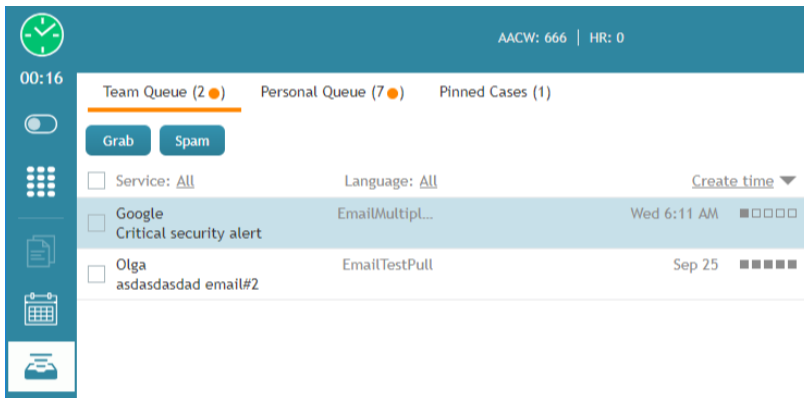


The Agent Desktop Calendar

My Cases



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



My Cases contains your email cases

Contacts



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

First Name	Last Name	Phone	Email	Source
Konstantin	Kishirsky	(415) 601-1166	-	-
Evgenia		(415) 573-8710	-	-
Christy	Borden	650-101-1111	-	-
Maria	Pupkina	141530125638	-	-
Olga	Voronina	14151234556	-	-
Alexei	V5	1111111111	alex@brightpatterns.com	-
Barack	Obama	(415) 316-2140	barack.obama@gmail.com	-
Edmund	Wong	(858) 999-5088	edmund.wong@brightpattern.com	-
Maria	Solovyeva	(415) 316-2140	ru0483p@gmail.com	-
	Google	-	no-reply@accounts.google.com	-

Buttons: Open, Create, Delete

powered by Bright Pattern

My Cases

Supervision



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

Chat Center



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

My Grades



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

00:56 | CH: 0 | OCH: 0 | TR: 0.0 | WF: 00:00

Break Time Remaining: 20 min permitted, 1109 min exceeded

My Stats vs. My Team's: Handled (5 vs 5), Average Handling Time (00:18 vs 00:18), Successful interactions (80% vs 100%)

Dispositions: Answer provided (3), Problem solved (1), Need more information (1), Spam (1)

Agenda: Friday, April 27. You have no events scheduled today or in the future.

Alerts: No announcements

Satisfaction: Resolutions (0%), Net Promoter Score (0%), Demanor (0)

My Grades

Controls Area (at top right of Agent Desktop)

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

Contact Search



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



Contact Search field

Wallboard

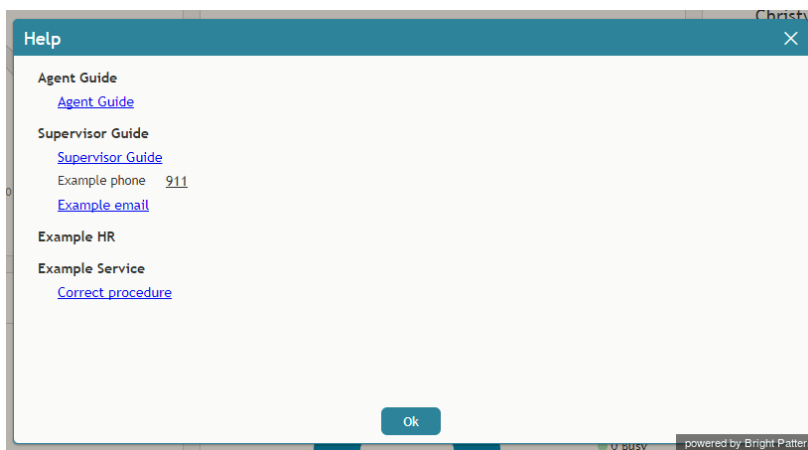


Clicking the *Wallboard* icon will direct you to the Wallboard Builder application in a new browser tab or window. Wallboards display statistics and informational widgets about your current performance and/or performance of your team. If you have the privilege to edit wallboards, you can customize them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

Help




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

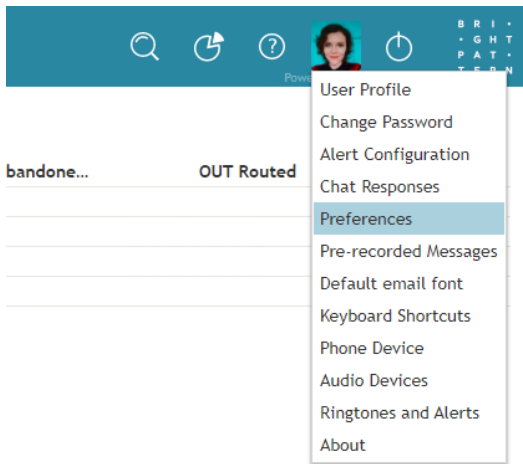


Agent Desktop Help

Settings

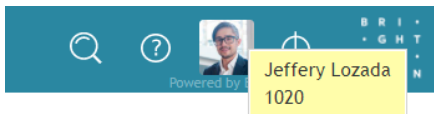


If you have not uploaded a user profile photo, Agent Desktop Settings is shown as a cog icon . If you have already uploaded a user profile photo, that same image is shown in place of the cog icon. Click either icon to update your settings.



Settings

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



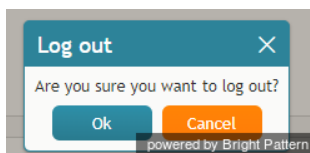
Mouse over Settings to view user name and extension

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

Log out



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



Logging out of Agent Desktop

Context Information Area (at center of screen)


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

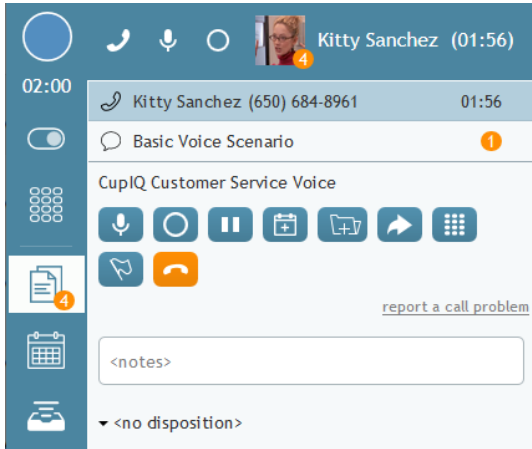
The Context Information Area is also used for the following:

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

- Calendar display

Alerts

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



Alerts indicate items requiring an agent's attention