



## 5.8 Microsoft Teams

### Bright Pattern Documentation

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# Microsoft Teams

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

## Articles

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

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

## How to Sign in to Teams Integrated with Bright Pattern Contact Center

Bright Pattern Contact Center integrates with Microsoft Teams to allow you to access Teams communication channels information for calls, internal chats, and group chats while working in the Agent Desktop application. Signing in to Teams allows Teams integration to act in Teams on your behalf.

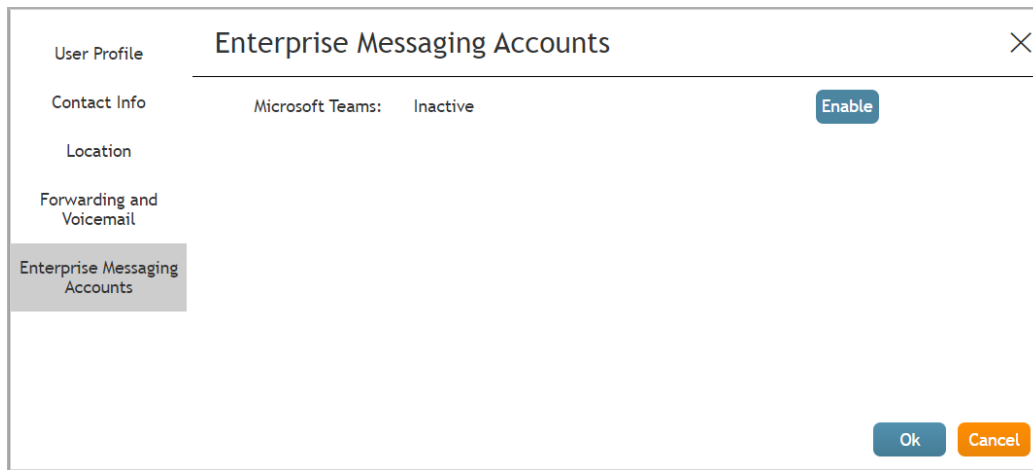
If your contact center integrates with Teams for company messaging and internal communications, you may notice Teams-related items in the Agent Desktop directory, such as Teams icons, Teams user personnel, or Teams folders. You will be asked to sign in to your company's Microsoft account whenever you try to send an internal chat to a Teams user, open a Teams folder or channel, or otherwise access Teams while handling chat interactions.

This article will walk you through the sign-in process.

## Procedure

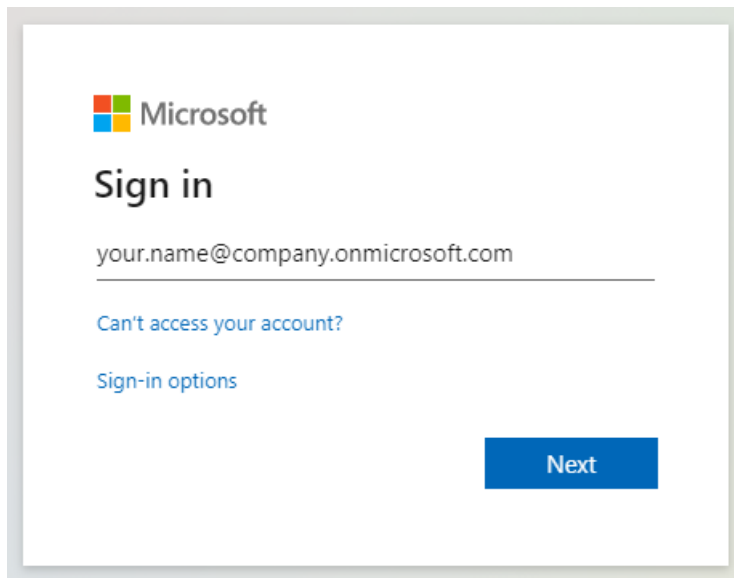
To sign in to Microsoft and use Teams within the Agent Desktop application, follow these steps:

1. In Agent Desktop, go to *Settings > User Profile* and click the **Enterprise Messaging Accounts** tab.
2. Click **Enable**.



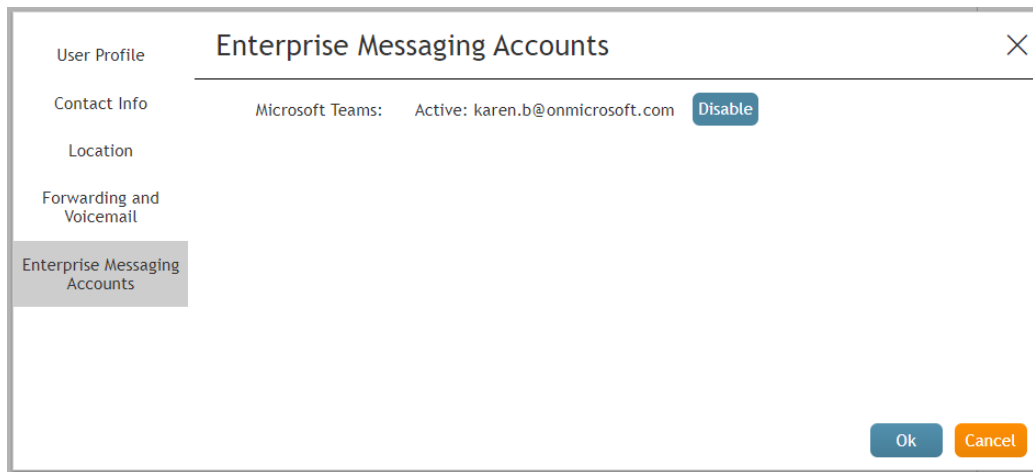
User profile > Enterprise Messaging Accounts tab is where you go to sign in to Microsoft

3. In the new browser tab or window that opens, follow the prompts to sign in to Microsoft with your Microsoft credentials. If you do not know your email address or password, contact your supervisor.



Example of a Microsoft Sign in prompt for entering your email address

4. After you are signed in, the **Enterprise Messaging Accounts** tab will show that your Microsoft account is active.



User profile > Enterprise Messaging Accounts tab shows that your account is active

5. Click **Ok** to save your changes. You can now return to Agent Desktop and use Teams in personal chats and service chats.

## Accessing Microsoft Teams in the Agent Desktop Widget

If your contact center integrates with Microsoft Teams for company messaging and internal communications, it is possible for you to access Teams-related items in the Agent Desktop widget directory. Items include Teams icons, Teams user personnel, or Teams folders.

You will have access to the Agent Desktop widget if your contact center integrates with [CRM software](#) (e.g., Salesforce, Zendesk, etc.) or has a website that uses the [embedded Agent Desktop widget](#).

You will be asked to sign in to your company's Microsoft account whenever you try to send an internal chat to a Teams user, open a Teams folder or channel, or otherwise access Teams while handling chat interactions.

This article will walk you through the sign-in process.

**Note:** If you are on an active call in the Agent Desktop widget, you will not be able to start a new call by clicking the initiate transfer button that opens up in a directory pop-up (i.e., the button used for consult transfers). In order to perform this function in the widget, you will need to start a separate call and then complete the transfer to it.

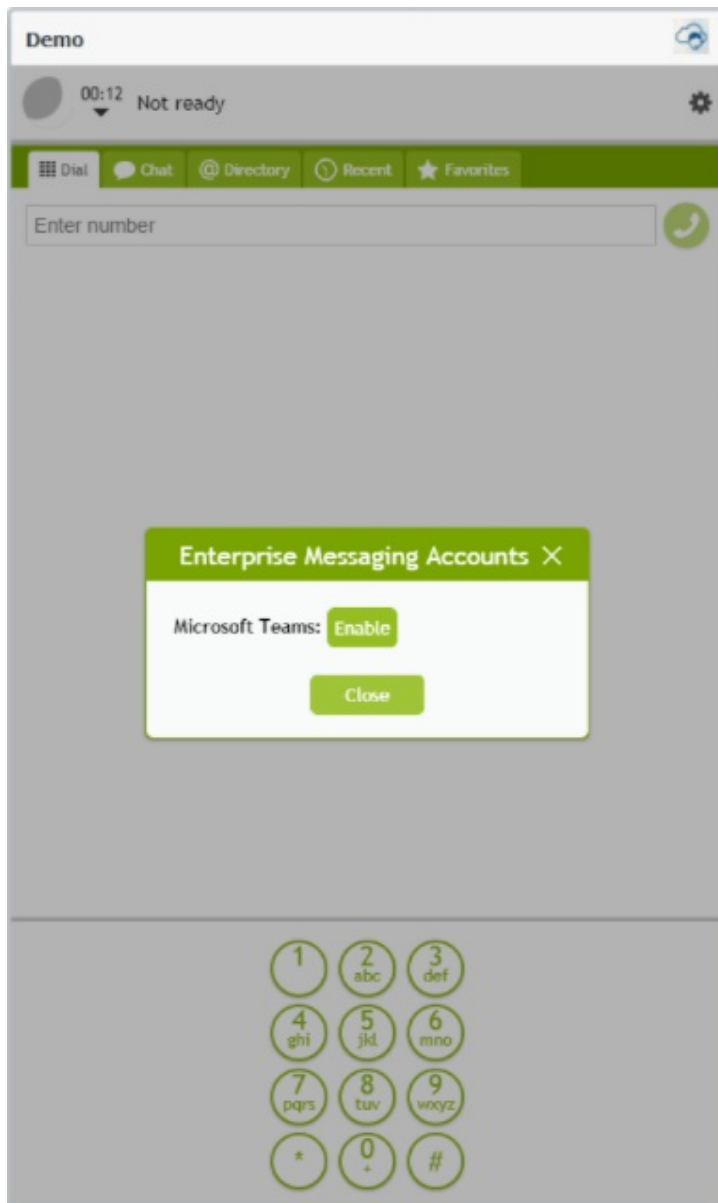
### Procedure

To sign in to Microsoft and use Teams within the Agent Desktop widget, follow these steps:

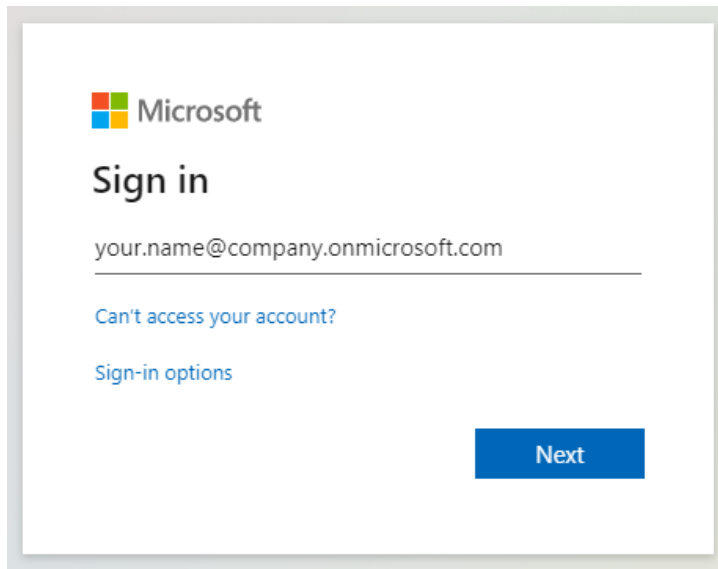
1. In the Agent Desktop widget, click the **Settings** icon and then select the **Enterprise Messaging Accounts** option.



2. In the window, click **Enable**.

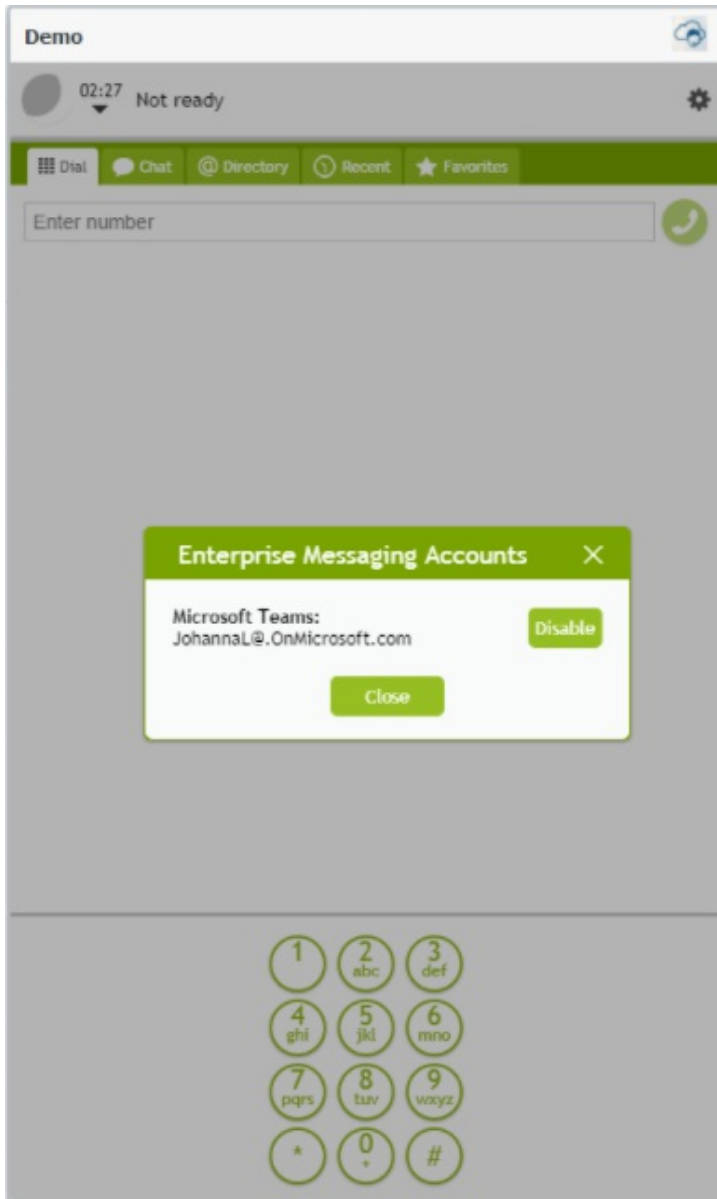


3. In the new browser tab or window that opens, follow the prompts to sign in to Microsoft with your Microsoft credentials. If you do not know your email address or password, contact your supervisor.



4. After you are signed in, the Enterprise Messaging Accounts window will show that your Microsoft account is active. Click **Close** to return to the Agent Desktop widget and use Teams in personal chats and service chats.





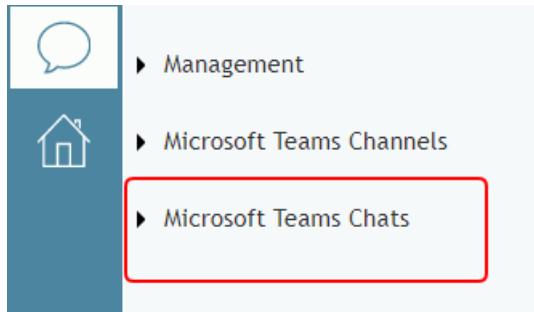
## How to Get Help from Experts During Active Interactions Via the Directory

While you are chatting with customers, you may need to ask an expert for assistance. If your contact center uses Microsoft Teams for communications, you can easily browse the Agent Desktop Directory for an expert who is logged in to Teams and is available to consult with you about the customer's issue.

This article will show you how to find an expert on Teams and invite them to a personal chat.

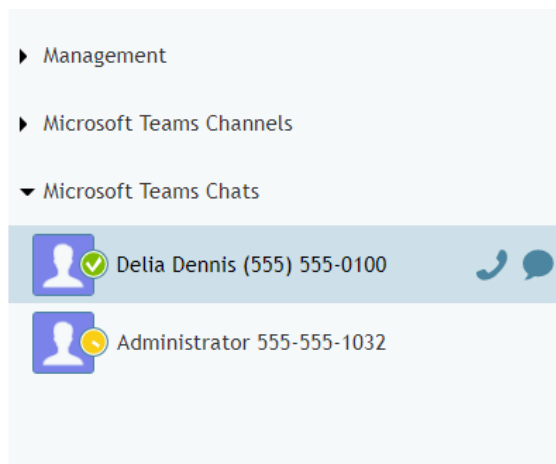
## Procedure

1. Visit your [User Profile settings](#) to make sure that Microsoft Teams is enabled. When enabled, you are signed in to your Microsoft account and you will be able to engage with Teams experts without having to sign in again.
2. When you are handling a service call or chat with a customer, open the [Directory](#).
3. If you know the name of the expert you are trying to reach, and you have already messaged them before, click the **Microsoft Teams Chats** folder to view its contents.




Agent Desktop Directory > Microsoft Teams Chats folder

4. *Microsoft Teams Chats* is a folder that contains the chat conversations that you have had previously with experts on Teams. Experts are shown in alphabetical order inside their respective folder. You will see the person's name, profile picture, [presence](#) (e.g., Available, Away, Do Not Disturb, etc.), a phone number or a menu button icon if there are multiple numbers, a chat button for sending a message to the expert, and a dial button for calling the expert.

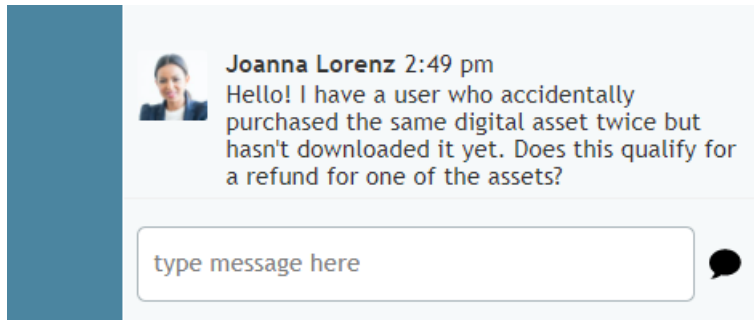


Example of some experts that are available, away, and busy

5. Find the appropriate expert. If the expert's [presence](#) (e.g., Available, Away, Do Not Disturb, etc.) shows that they are  available, either click the chat bubble icon to start a chat conversation with them, or click the phone icon to start dialing their phone number.

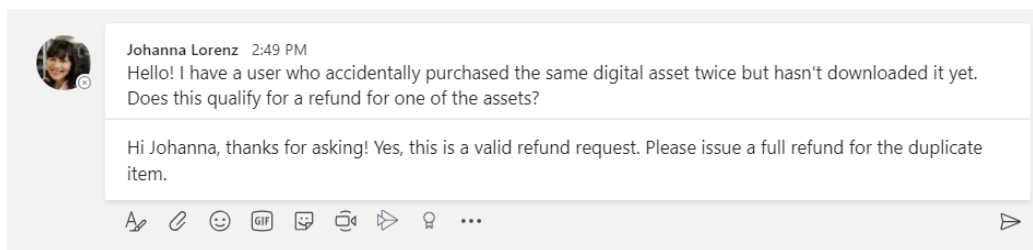
Note that in Teams, being available simply means that the user is signed in to Teams and is able to receive messages; it does not mean that the user will look at the message or respond immediately.

Also note that chats with Teams experts are treated as personal chats, not service chats, and your customer will not see your conversation.



Example of a chat with a Teams expert

6. At this time, the expert will see the incoming chat, accept the chat, and respond to your request in Teams. An example of the chat from the expert's view in Teams is shown.



Example of a chat with a Teams expert on the Teams side

7. Meanwhile, you will see the chat as a regular personal chat with another agent. You can chat with the expert while still chatting with your customer. After the customer chat is complete, you may review the history of your conversation with the expert by visiting Agent Desktop's [Chat Center](#) section, or by browsing the Directory's *Microsoft Teams Chats* folder for the recent chat.

If you do not know the expert's name but you generally know which department handles your customer's issue, click on the **Microsoft Teams Channels** folder and see the tutorial [How to Get Help from Experts Via Teams Channels](#) for more information.

## How to Get Help from Experts Via Teams Channels

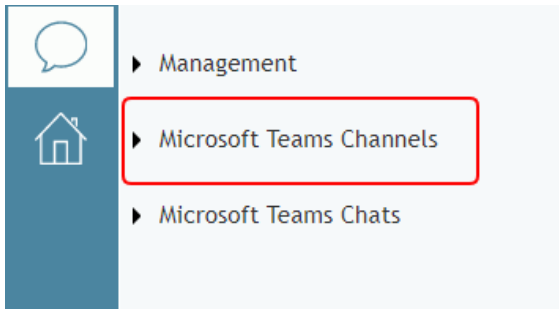
During service calls or chats with customers, you may need to consult with an expert to resolve the customer's issue. If your contact center integrates with Microsoft Teams, you can get help quickly from other users in Teams channels.

This article will show you how to locate Teams channels in the Agent Desktop Directory, post a message to a channel, and receive a reply back from an expert who is assigned to the channel.

### Procedure

1. Visit your [User Profile](#) settings to make sure that Microsoft Teams is enabled. When enabled, you are signed in to your Microsoft account and you will be able to engage with Teams experts without having to sign in again.

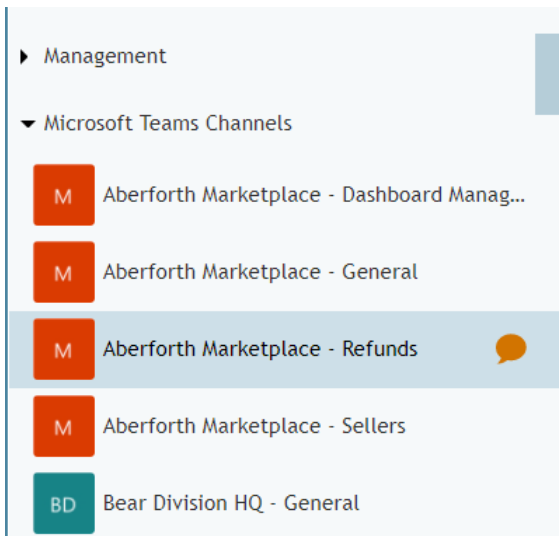
2. When you are handling a service chat with a customer, open the [Directory](#) and click on the **Microsoft Teams Channels** folder to view its contents.



Agent Desktop Directory > Microsoft Teams Channels folder

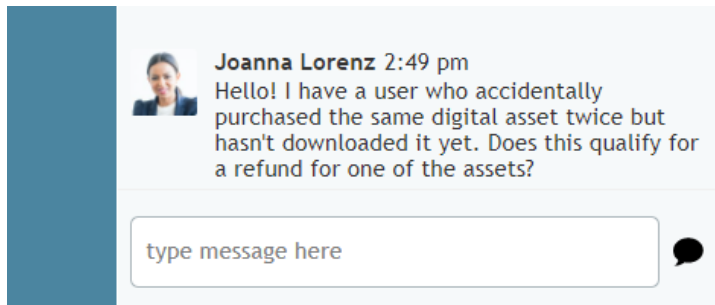
3. *Microsoft Teams Channels* is a folder that contains all channels associated with specific Teams (e.g., Brand ABC - Retail, Brand ABC - General, etc.). When expanding the folder, there may be a large number of channels or teams that reflect further user organization in your company's Teams system.

Note that if you did not enable Teams in your User Profile, you will not be able to see any of the Teams folders in the Directory. Opening a folder will require that you sign in with your Microsoft email address and password. If you did not sign in, you will not be able to see any of the Teams folders in the Directory.



Example of Teams channels in the Directory

4. Browse the channels to find the appropriate one for your customer's issue, and click on the chat icon beside the channel name. Clicking on the chat icon will open an empty chat interaction that corresponds to a new conversation in the channel.
5. Type a message into the chat's text entry field, and send it. Once your first message is sent, a new Channel conversation will be created.



Posting a message to a Teams channel is like sending an internal message to an agent

6. Experts who are assigned to monitor the channel will notice your message and will reply to it. You will receive the reply as a personal chat message in Agent Desktop, and once you and the expert are connected, you are free to chat with the expert about the customer's issue while still chatting with the customer.

Note that closing the chat interaction with the expert will end the conversation, and you will not be able to continue the chat in Agent Desktop anymore. Also note that you can have only one active conversation within the same Teams Channel at a time.

7. If you need to consult with an expert after closing the chat, simply repeat these steps.

Note that all replies (before and after logout or ending the conversation) can be seen in the Teams application or web version of Teams at any time. Simply log in to the Teams application or the web version to view.

## How to Configure Your Teams Direct Routing Number as a Softphone Device

Bright Pattern Contact Center integrates with Microsoft Teams to allow you to access Teams communication channels information for calls, internal chats, and group chats while working in the Agent Desktop application. Signing in to Teams allows Teams integration to act in Teams on your behalf.

If allowed by your contact center administrators, it is possible to configure your Microsoft Teams Direct Routing number as a softphone device in Agent Desktop. When you configure this option, note that the phone number must be entered exactly as it is displayed in Microsoft Teams. The phone number may contain digits, the + symbol, and the , symbol only.

**Note:** If this option is enabled, Microsoft Teams user presence is **not** synchronized with Agent Desktop; the Agent Desktop directory will display Agent Desktop [user presence](#).

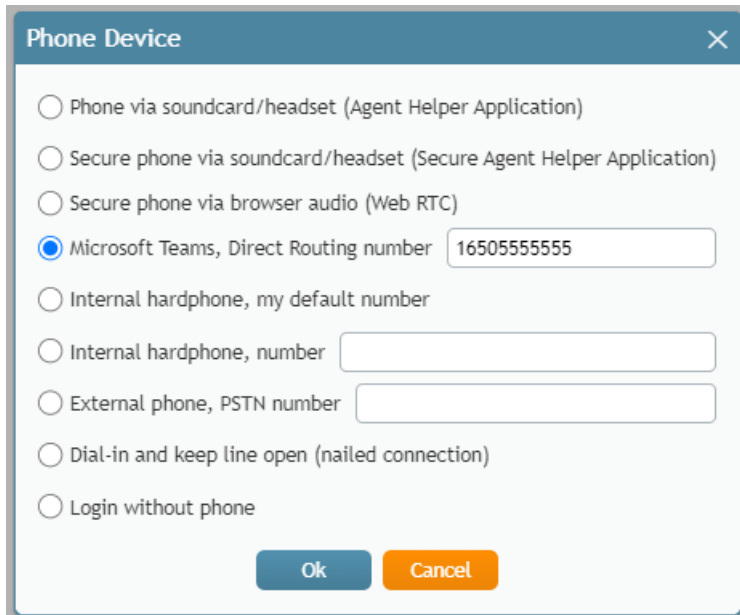
This article will walk you through the phone device configuration.

### Procedure

To configure your Microsoft Teams Direct Routing number as a softphone device within the Agent Desktop application, follow these steps:

1. In Agent Desktop, go to *Settings > Phone Device*.
2. Select the **Microsoft Teams, Direct Routing number** option.

3. In the number field, enter the Direct Routing number exactly as it appears in the Microsoft Teams application (e.g., 16505555555).
4. Click **OK** to save the phone device option.
5. From here, you will be able to make and receive calls in the Agent Desktop application as normal.




Enter the number exactly as it appears in Teams

## How to Invite Experts to Join Conference Chats with Customers

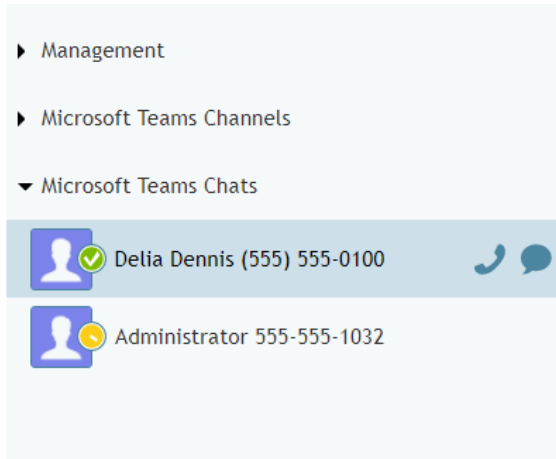
There may be times when you need a specialist or expert to jump in on a chat and speak directly to your customer. If your contact center integrates with Microsoft Teams, you can easily invite experts to join service chat conversations. When Teams experts join the fun, the chat interaction becomes a conference chat featuring you (the agent), the expert, and the customer.

This article will show you how to include experts in your service chats.

### Procedure

1. Visit your [User Profile](#) settings to make sure that Microsoft Teams is enabled. When enabled, you are signed in to your Microsoft account and you will be able to engage with Teams experts without having to sign in again.
2. During the chat, in the chat session pane, click the add icon  to invite another user from the directory to join the chat.

3. Browse the Directory and click the Microsoft Teams Chats folder to expand it. You will see any recent personal chat messages that you have previously had with Teams experts.



Directory > Microsoft Teams Chats folder showing the names of Teams experts

4. If there are no existing chat messages in this folder, this means that you have not had any chats with Teams users before. A Teams user will appear in the Teams Chats folder after a Teams user starts the first message to you, or after you send the first message to a Teams user via the Teams application. For help with sending messages to experts, see [How to Get Help from Experts During Active Interactions Via the Directory](#).

Note that you cannot invite Teams users from channels, and the Microsoft Teams Channels folder will not be shown in the Directory.

5. Click on the name of the Teams expert that you would like to invite to the chat, and then click **Invite**. Repeat this process for all the experts you wish to invite.

Once connected, the expert(s) will receive a message on Teams and will see the message text prefixed with your user name or chat nickname (if set in your User Profile), along with all history of the service chat (i.e., customer text, your text, attachments, emojis, system messages, etc.).

In the chat, you will see that the expert(s) have joined the conversation and their replies will be shown.