



5.8 Agent Tutorials

Bright Pattern Documentation

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Calendar

- [Overview](#)
- [How to Edit Existing Events](#)
- [How to Open the Calendar](#)
- [How to Schedule an Event](#)

Calls Tutorials

These tutorials provide step-by-step instructions for everything related voice calls: dialing, accepting, transferring, muting, and flagging.

Articles

Basic Information

- [Call Controls](#)

Accepting/Rejecting Calls

- [How to Answer an Incoming Call](#)
- [How to Reject an Incoming Call](#)

After Call Work and Dispositions

- [Dispositions and Notes](#)
- [How to Wrap Up After Call Work](#)

Callback Reservation

- [About Callback Reservation](#)

Conferences

- [How to Host a Conference](#)
- [How to Participate in a Conference](#)

Consultations and Transfers

- [How to Make Consultations and Transfers](#)
- [How to Warm Transfer](#)

Directory

- [How to Use the Directory](#)

Favorites

- [How to Use Favorite Contacts](#)

Follow-ups

- [How to Schedule a Follow-up Activity](#)

Mute and Hold

- [How to Hold and Retrieve a Call](#)
- [How to Mute a Call](#)
- [How to Release a Call](#)

Placing Calls

- [How to Make an Internal Call](#)
- [How to Make an Outbound Call](#)
- [How to Speed Dial Through External IVRs](#)

Recording and Voice

- [How to Connect a Voice Application to Your Call](#)
- [How to Record a Call](#)
- [How to Stop Call Recording](#)
- [How to Use Prerecorded Messages](#)
- [Voice Signatures](#)

Redialing

- [How to Redial a Previously Dialed Number](#)

Remote Assistance

- [Overview: Remote Assistance During Calls](#)
- [How to Start Remote Assistance During a Phone Call](#)
- [How to Transfer a Call with an Active Remote Assistance Session](#)

Sending Numeric Information

- [How to Send Numeric Information](#)

Service Queue

- [How to Place a Call in a Service Queue](#)

Cases and Email

- [Overview](#)

Accepting Email

- [How to Accept an Email](#)

Creating Cases

- [How to Create New Cases](#)

Follow-ups

- [How to Use Pinned Cases to Send a Follow-up Outbound Email](#)
- [How to Use Cases to Send a Follow-up Outbound Email](#)

Fonts

- [How to Change Default Email Font](#)

Handling Email

- [Filtering Case History Content](#)
- [How to Close an Email without Replying](#)
- [How to Change an Assigned Email Service](#)
- [How to Compose a Reply](#)
- [How to Transfer an Email](#)
- [How to Forward an Email](#)
- [How to Send a New Outbound Email](#)
- [How to Save an Email as a Draft](#)
- [How to Insert Images into Email](#)
- [How to Insert Hyperlinks into Email](#)

Masking Data

- [How to Remove Sensitive Data from Emails](#)

Print

- [How to Print an Email](#)

Retrieving Email from Queue

- [How to Retrieve an Email from the Team Queue](#)
- [How to Retrieve an Email from Personal Queue](#)

Reviewing Email

- [How to Review an Incoming Email](#)

Chats

- [Overview](#)

Accepting/Rejecting Chats

- [How to Accept a Chat Request](#)
- [How to Reject a Chat Request](#)

Audio/Video Chats

- [How to Have an Audio Chat](#)
- [How to Have a Video Chat](#)

Canned Responses

- [How to Create and Edit Canned Chat Responses](#)

Co-browsing

- [How to Co-browse with Surfly Integration](#)
- [How to Co-browse](#)

Creating Cases

- [How to Create a Case from a Chat Session](#)

Flagging Chats

- [How to Flag an Interaction](#)

Follow-ups

- [How to Schedule a Follow-Up Activity from a Chat Session](#)

Forms

- [How to Send a Secure Form](#)

Multiple Chats

- [Handling Multiple Chat Sessions](#)

Masking Sensitive Data

- [How to Remove Sensitive Data from Chats](#)

Remote Assistance

- [Overview: Remote Assistance in Chats](#)
- [How to Initiate Remote Assistance During a Chat/SMS/Messaging Session](#)
- [How to Transfer a Remote Assistance Session to a Different Agent During a Chat Session](#)

Sending Chat Messages

- [How to Send SMS/Text Messages](#)
- [Chat Messages](#)
- [How to Send and Receive Pictures and Documents](#)

Terminating the Chat

- [How to End a Chat Session](#)

Transfers

- [How to Transfer Your Chat Session](#)

Contacts

- [Overview](#)
- [How to Create a New Contact](#)
- [How to Edit an Existing Contact](#)

Knowledge Base

- [Overview](#)
- [How to Contribute Content to the Knowledge Base](#)
- [How to Use a Knowledge Base Article](#)

Microsoft Teams

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

Articles

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

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

Outbound Campaigns

- [Overview](#)
- [How to Reject a Calling Record](#)
- [How to Review a Calling Record](#)
- [How to Reschedule a Call Attempt](#)

Remote Assist Overview

When the Bright Pattern Contact Center Remote Assist (RA) feature 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 Assist makes it easier to provide troubleshooting and help.

RA grants agents the ability to assist customers using an application installed in the Agent Desktop.

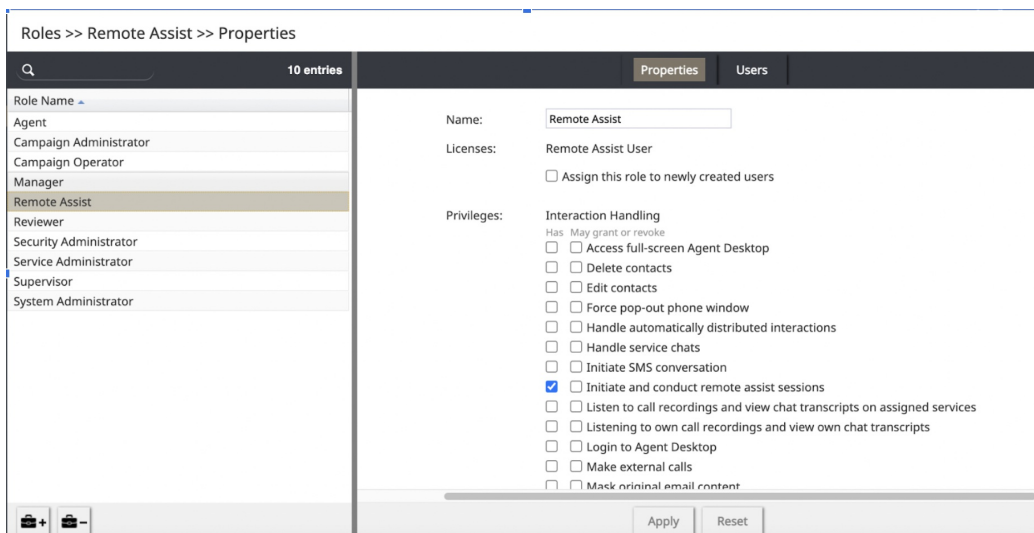
RA provides the following functions for agents:

- Screen sharing
- Remote control (Agent Desktop desktop platform only)
- Copy files between agent and customer
- Clipboard text copy/paste between agents and customers
- Transfer and conference calls and chats processing

Requirements

Using the Remote Assist feature requires the following:

- This feature is enabled by your contact center's service provider. For more information, contact your administrator.
- In order to use the Remote Assist feature, you must have the [Initiate and Conduct Remote Assist Sessions](#) privilege.



Remote Assist Privilege

Tutorials

The following articles will guide you through some of the ways that you can use RA during chat and voice sessions:

- [Remote Assist on Macs](#)
- [The Remote Assist Tab](#)

- [How to Use Remote Assist](#)
- [How to Download and Run the Remote Assist Application](#)
- [Customer Interaction Window](#)
- [Beginning a Chat Remote Assist Session](#)
- [Beginning a Phone Call Remote Assist Session](#)
- [Accidental Session End Within a Remote Assist Session](#)
- [How to Continue a Remote Assist Chat Session if the Client's Browser Must Be Restarted](#)
- [How to Elevate the Desktop and Continue a Remote Assist Session](#)
- [How to Switch a User to Administrator Mode in Windows](#)
- [How to Use Send keys During a Remote Assist Session](#)
- [Leaving a Remote Assist Session](#)
- [Multiple Agents on a Remote Assist Session](#)
- [Multiple Remote Assist Sessions](#)
- [Navigating the Available Monitor Screens in a Remote Assist Session](#)
- [New PIN or URL in a Remote Assist Session](#)
- [Pop the Remote Assist Viewing Window](#)
- [Remote Assist Activity History](#)
- [Remote Assist Within a CRM Session](#)
- [Transferring a Remote Assist Session to Another Agent](#)
- [Transferring Files in a Remote Assist Session](#)

Search

- [Overview](#)
- [How to Conduct Advanced Searches](#)
- [Using URL Variations to Access Case and Contact Information](#)

States

- [Overview](#)
- [How to Interpret Your Current State Information](#)
- [How to Make Yourself Ready](#)
- [How to Make Yourself Not Ready](#)