



5.8 Agent Desktop User Interface

Bright Pattern Documentation

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1. REDIRECT [5.3:Agent-guide/Tutorials/States/HowtoInterpretYourCurrentStateInformation](#)

How to Use the Directory

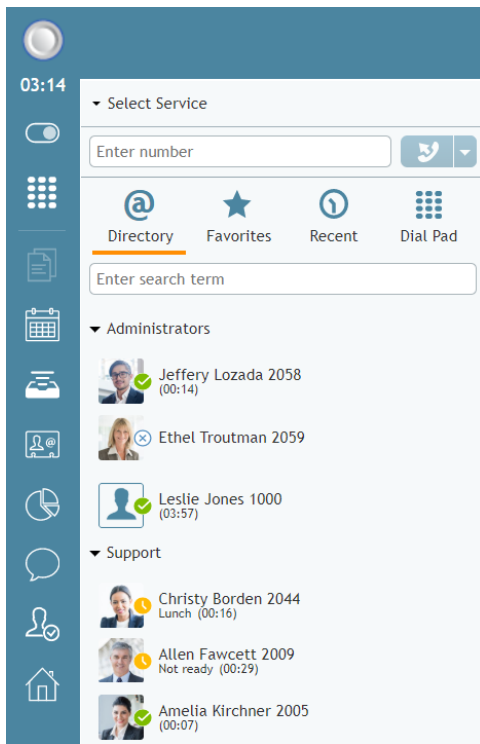
You can contact users registered in your contact center by selecting them from the Directory tab. The directory displays users in your organization grouped by teams. It may also show service queues and some frequently used external numbers.

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



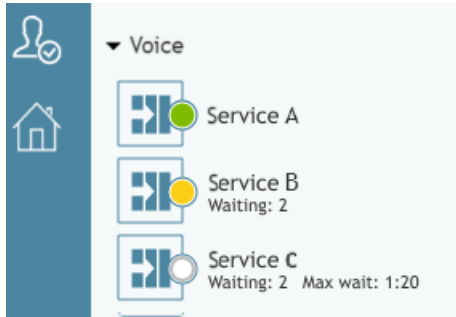
The user is in the [Supervising](#) state.

Logged Out



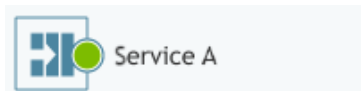
The user is logged out.

Service Queue Icons



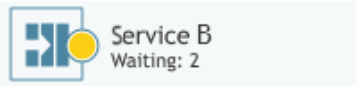
Example of queue icons shown in the directory

Logged in, Ready



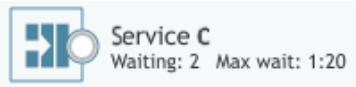
For this service, one or more agents are currently in the [Ready](#) state. The availability icon is shown in green. If any additional service metrics are [configured to be shown in the directory](#), those metric names and values are shown next to the availability icon.

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

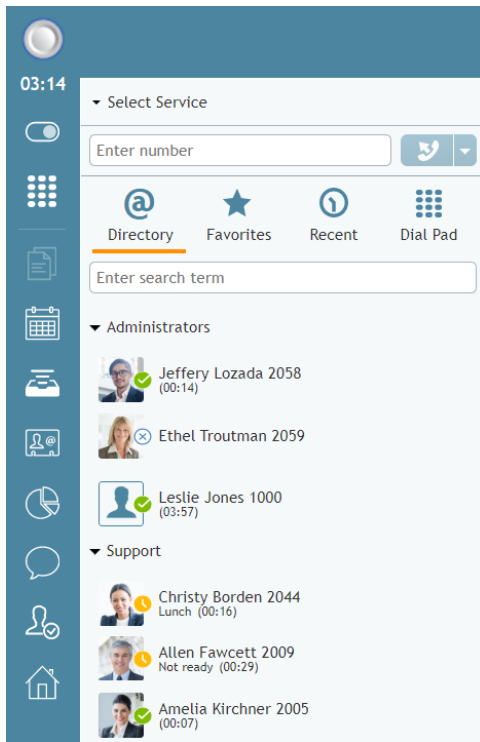
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Directory

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Presence Icons

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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.

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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



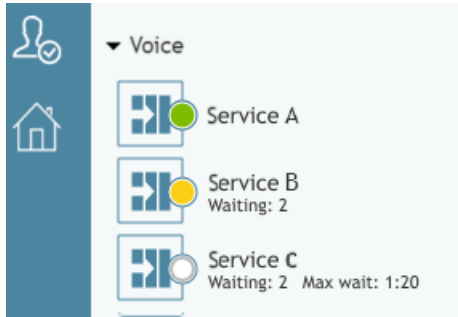
The user is in the [Supervising](#) state.

Logged Out



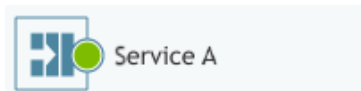
The user is logged out.

Service Queue Icons



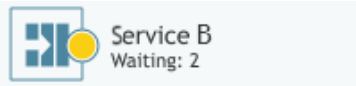
Example of queue icons shown in the directory

Logged in, Ready



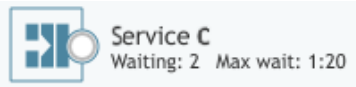
For this service, one or more agents are currently in the [Ready](#) state. The availability icon is shown in green. If any additional service metrics are [configured to be shown in the directory](#), those metric names and values are shown next to the availability icon.

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.

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](#)

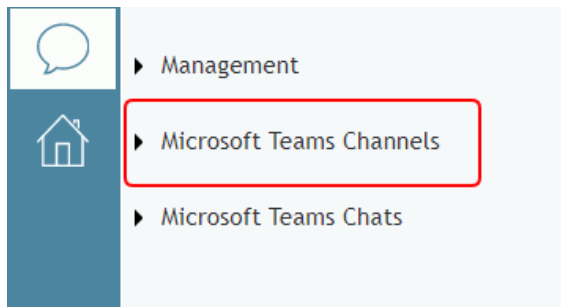
How to Get Help from Experts Via Teams Channels

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

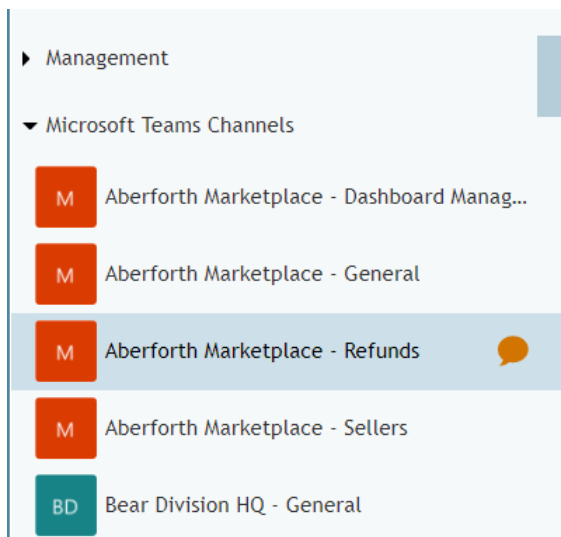
1. Visit your [User Profile](#) settings to make sure that Microsoft Teams is enabled. When enabled, you are signed in to your Microsoft account and you will be able to engage with Teams experts without having to sign in again.
2. When you are handling a service chat with a customer, open the [Directory](#)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

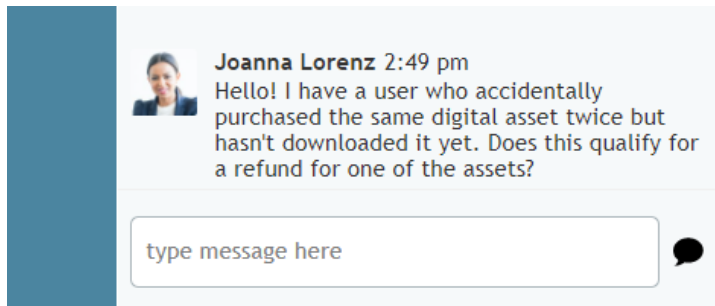
Note that if you did not enable Teams in your User Profile, you will not be able to see any of the Teams folders in the Directory. Opening a folder will require that you sign in with your Microsoft email address and password. If you did not sign in, you will not be able to see any of the Teams folders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

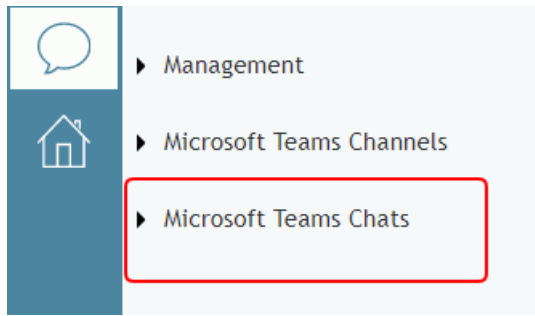
How to Get Help from Experts During Active Interactions Via the Directory

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.

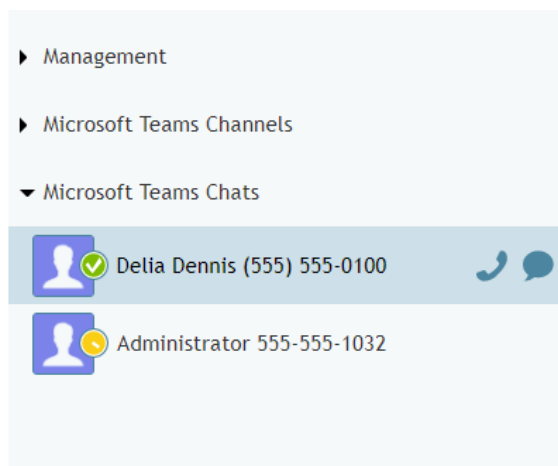
Procedure

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.

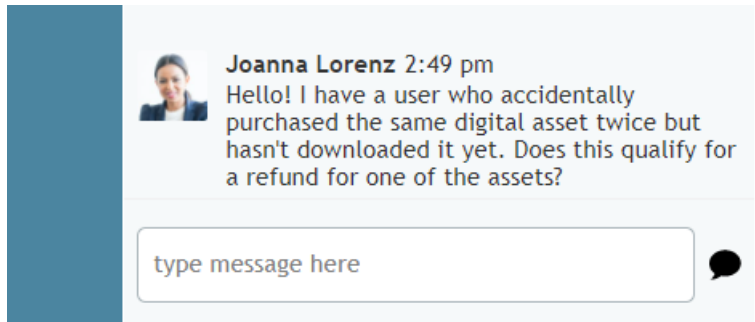


Example of some experts that are available, away, and busy

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.

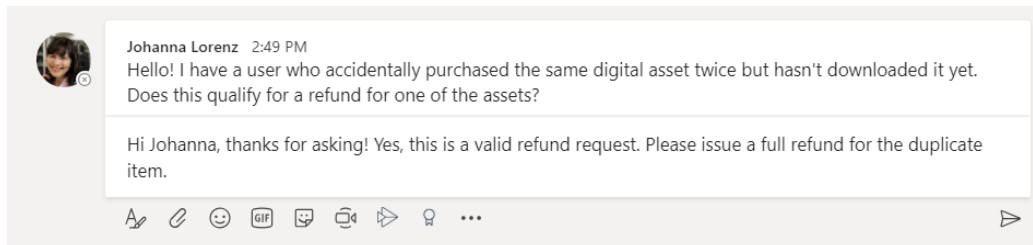
Note that in Teams, being available simply means that the user is signed in to Teams and is able to receive messages; it does not mean that the user will look at the message or respond immediately.

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.

1. REDIRECT [5.3:Agent-guide/Tutorials/Calendar/HowtoOpentheCalendar](#)

1. REDIRECT [5.3:Agent-guide/Work/CasesEmail/Overview](#)

1. REDIRECT [5.3:Agent-guide/Work/HomePage/Overview](#)

1. REDIRECT [5.3:Agent-guide/Work/Screen-Pop/Overview](#)

