

5.8 Chats Overview

Bright Pattern Documentation

Generated: 5/24/2022 8:42 am

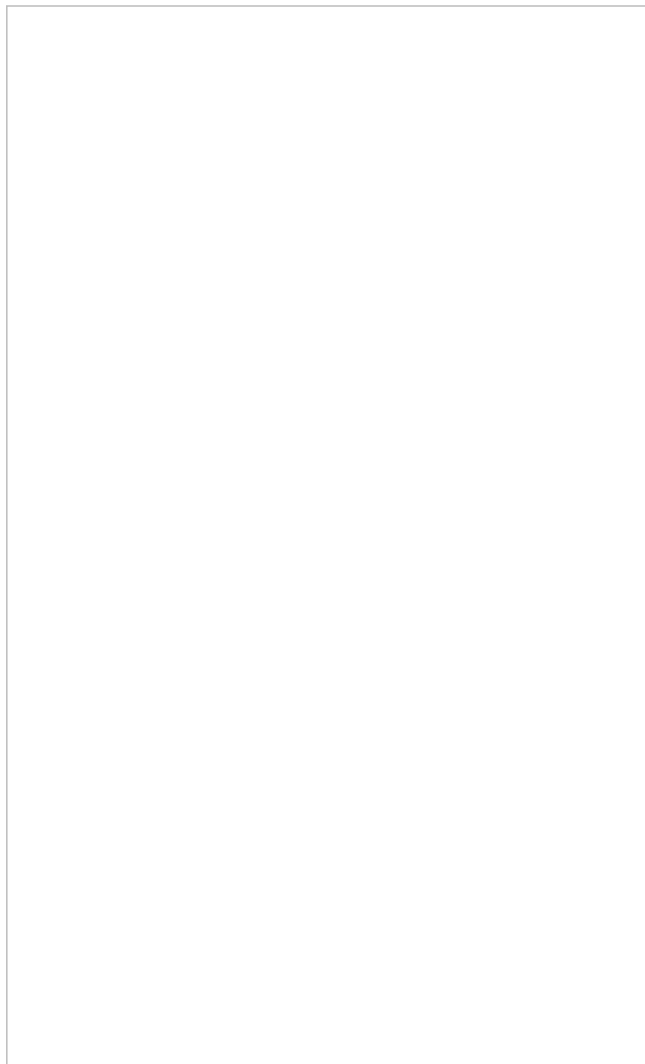
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Chat Controls

The controls available to you during an active chat session allow you to take a variety of actions including [taking notes](#), [searching the Knowledge Base](#), and [adding attachments](#); the following is a list of buttons and controls you will see.



An active chat session

Schedule a Follow-Up Activity



The *Schedule a follow-up activity* button allows you to [schedule an event](#) in your calendar. Scheduling events lets you set reminders to follow-up with customers, agents, or activities at a later time.

Add a New Case



The *Add a new case* button allows you to create a new case related to an interaction. Creating cases for chat sessions creates a record of the interaction and can allow you to follow up with the customer through other channels (i.e., email, voice). For more information, see [How to Create New Cases](#).

Start VoIP Call



If enabled for your chat service, the *Start VoIP Call* button allows you to make a VoIP call to the customer. For more information, see [How to Have an Audio Chat](#).

Flag the Chat



The *Flag the chat* button allows you to flag the chat; flagging a chat indicates to your supervisor that you need assistance with the interaction. For more information, see [How to Flag a Chat Session](#).

End Chat




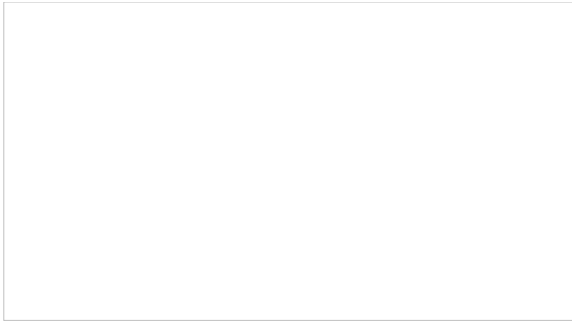
The *End Chat* button ends the chat. Note that if you are conducting a [conference](#) and there is more than one agent and/or supervisor active in the chat session, selecting the End Chat button will end the chat for you only (i.e., the chat will stay active until the last user ends it).

Channel Selector Control



The *Channel Selector* control allows you to chat with the customer on a different media channel (i.e., web chat, SMS, Facebook Messenger, etc.) without ending the conversation. The Channel Selector will show all media channels available to you. If your contact center integrates with Facebook Messenger and WhatsApp, for example, those messenger types will be shown. The default channel type will be the same as the active interaction.


Whether you have selected a specific channel type or are using the default, you will be presented with a message field where you may enter a message to send to the customer. To send a message to the customer, type your message, then press the <ENTER> key or click the **send message**  icon.

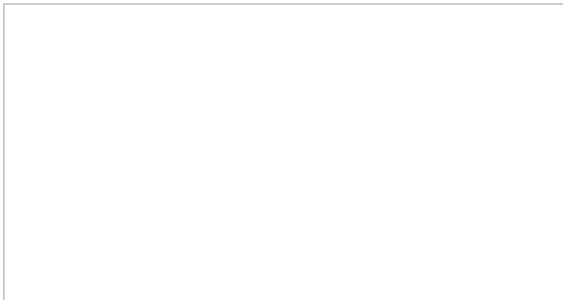


The message field during an active chat

Select Notes Control



When selected, the notes control allows you to take notes during the chat session. The notes  icon indicates to you this is a *notes* field and not a *message* field. For more information, see [How to Enter Dispositions and Notes](#).

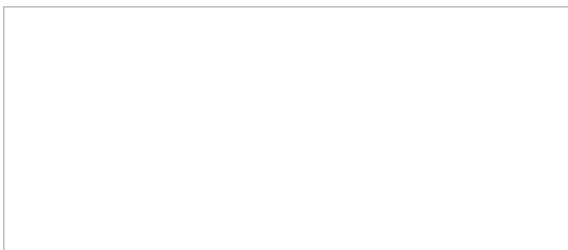


You may take notes during your chat session

Select Disposition Control



If your contact center uses dispositions, when selected, the disposition control allows you to predisposition the interaction before the chat ends; note that the disposition may be changed after the chat has ended but before the interaction is [completed](#). For more information, see [How to Enter Dispositions and Notes](#).



You may disposition a chat before it ends

Invite for Conference or Warm Transfer



When selected, the *Invite for conference or warm transfer* pops a directory and allows you to select another agent or supervisor to join (i.e., conference) the chat. Note that after another user joins the chat, you may select the [End Chat](#) button and leave; the chat will remain active for the other user.

Co-browsing or Start Remote Assistance



The presence of this button indicates that your contact center allows either [remote assistance](#) via integration with LogMeIn Rescue or [co-browsing](#) via integration with Surfly. **Note:** Ask your supervisor which feature is available to you.

Search the Knowledge Base



When selected, the *Search the Knowledge Base* icon pops the Knowledge Base panel, allowing you to browse through articles, look for keywords, and so forth. For more information, see [How to Use a Knowledge Base Article](#).

Add an Attachment



When selected, the *Add an attachment* icon pops a window and allows you to select a file from your computer to upload to the chat as an attachment. For more information, see [How to Send and Receive Pictures and Documents](#).

Insert Emoji

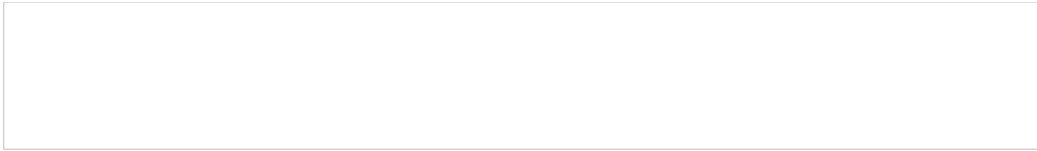


When selected, the *Insert emoji* icon pops a selection of emojis; selected emojis are inserted into the message field.

Select Predefined Message



When selected, the *Select predefined message* icon pops a list of [canned chat responses](#) you have defined in Agent Desktop. Canned chat responses are used to populate the [message](#) field. For more information, see [How to Create and Edit Canned Chat Responses](#).

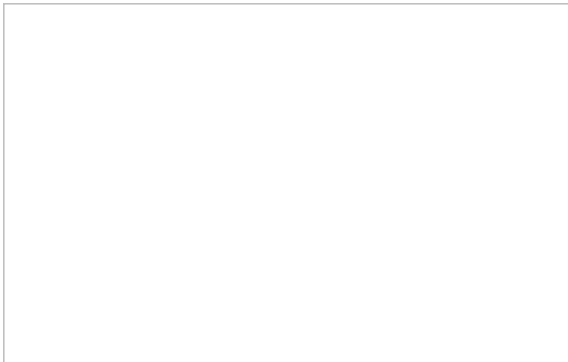


Predefined messages, also known as canned chat responses

Complete



After your chat session is completed, you will have time to complete *After Call Work (ACW)*. ACW includes writing notes, dispositioning the chat, or finishing filling out any forms related to the service. For more information, see [How to Wrap Up After Call Work](#).



The Complete button at the bottom of the chat

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1. REDIRECT [#topic_agent-guide/tutorials/chatcenter/howtostartagroupchat](#)

1. REDIRECT [#topic_agent-guide/tutorials/chatcenter/howtouseinternalchat](#)

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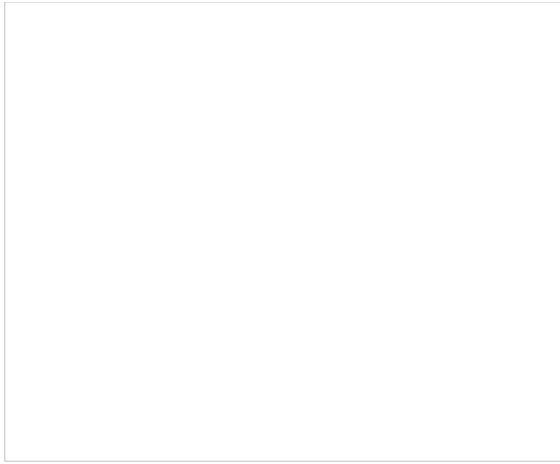
How to Invite Experts to Join Conference Chats with Customers

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.

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