5.8 Working in Agent Desktop

Bright Pattern Documentation

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Accessibility Overview

Bright Pattern Contact Center software makes it easy for visually impaired agents to provide great customer service.

Agent Desktop supports screen readers like JAWS (Job Access with Speech), is cloud-based so supervisors can monitor and support agents from anywhere, features WAI-ARIA tags in key interface locations (e.g., in pop-up notifications), and offers a slew of keyboard shortcuts for invoking some of the more frequently used Agent Desktop functions directly.

Articles

The following is a list of articles in this section:

- Keyboard Shortcuts (for Windows)

Calendar Overview

Beyond showing dates, the Agent Desktop Calendar serves multiple purposes:

- Schedule and edit events and appointments
- Reassign events to other contact center users
- Set reminders
- Facilitate follow-ups to customers

Articles

The following is a list of articles in this section:

- Calendar Views
- Reminders

Tutorials

Learn more about using the Calendar in this guide's Tutorials section.

- How to Edit Existing Events
- How to Open the Calendar
- How to Schedule an Event

Calls Overview

On Agent Desktop, you will be handling calls that are either inbound or outbound.

Inbound voice calls can be accepted, rejected, initiated, and transferred. Outbound voice calls can be initiated in many ways, such as by clicking on a person's contact details, dialing a user in the directory, or entering a phone number in the dialpad manually.

Tutorials

Learn more about how to handle inbound and outbound calls in this guide's Tutorials section.

- Accepting/Rejecting Calls
- After Call Work and Dispositions
- Conferences
- Consultations and Transfers
- Directory
- Favorites
- Follow-ups
- Mute and Hold
- Placing Calls
- Recording and Voice
- Redialing
- Sending Numeric Information
- Service Queue

Cases and Email Overview

In addition to calls and chats, you may be assigned to process customer requests made via email. Depending on your contact center practices, customer emails can either be delivered directly to your desktop (i.e., the *Push* method) or appear in the team queue from which you will be expected to retrieve them manually (i.e., the *Pull* method).

Emails can also be assigned to you by a supervisor. In this case, they will appear in your personal queue from which you will also be expected to retrieve them manually. Finally, emails can be transferred to you by other agents. Once you have accepted an incoming email or retrieved one from a queue, all subsequent steps of its processing will be the same.

In the simplest email processing scenario, a single reply to the customer's inquiry will be sufficient to finish the interaction. More complex scenarios may involve some follow-up messages from your contact center to the customer and/or additional communications from the customer.

To support these scenarios, each email is associated with a *case* and a *thread*. See the Cases, Email, and Threads section for more information about these entities.

Depending on your contact center configuration, you may be expected to handle multiple emails simultaneously. Your system administrator will advise you about the maximum number of emails that you may have active on your desktop at any given time.

Regardless of how many active emails you have, only one of them will be in focus at any given moment. The in-focus email is the one that is currently selected in the *Active Communications List*. The email working area will be entirely dedicated to the in-focus email and all of its controls will take effect for that email only. You can place another email in focus by selecting it from the *Active Communications List*. You can switch between your various active emails in this manner at any time.

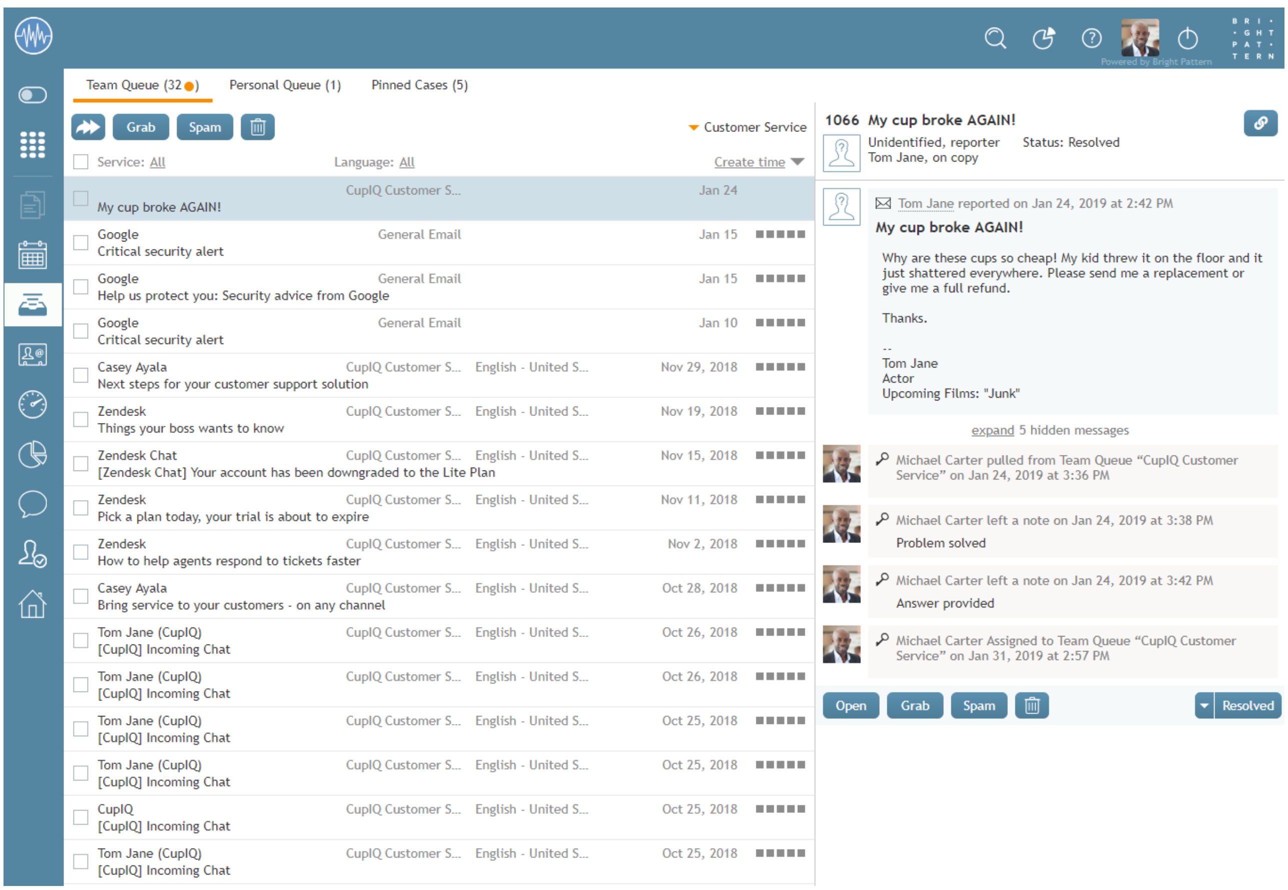
Articles

The following is a list of articles in this section:

- [Cases, Email, and Threads]
- [My Cases Interface]
- [Case State]

Tutorials

For a list of tutorials for cases and email, see [Cases and Email Tutorials].



Agent Desktop with My Queue and Team Queue in Contact Info Panel

Chats Overview

If chat is enabled for your contact center, you will be chatting with either other contact center users via the Chat Center, or with customers routed to you via service chats.

The Chat Center allows you to send and receive messages to individual users or to groups in your contact center. We call these types of chat interactions *personal chats*. The chat interactions that you have with customers are called *service chats*.

Articles

The following is a list of articles in this section:

- Chat Controls

Tutorials

Learn more about chat interactions in this guide's Tutorials section.

Personal Chat Tutorials

- Group Chat
- Personal Chat

Service Chat Tutorials

- Accepting/Rejecting Chats
- Audio/Video Chats
- Canned Responses
- Co-browsing
- Creating Cases
- Flagging Chats
- Follow-ups
- Forms
- Inviting Microsoft Teams Experts to Join Conference Chats with Customers
- Multiple Chats
- Sending Chat Messages
- Sending SMS
- Terminate the Chat
- Transfers

Contacts Overview

Search & Preview Records (formerly known as Contacts) is where cases and contact records are located, as well as a search bar that allows you sort through them quickly and easily. The following is an overview of what you will see in this section of Agent Desktop.

Note: The *Bulk Export/Import Contacts* feature available in this section prior to release 5.3.2 was removed and added to the Contact Center Administrator application, section Contact Import & Export.

Articles

The following is a list of articles in this section:

- Search & Preview Records Interface

Tutorials

Learn more about using the Search and Preview Records features in this guide's Tutorials section.

- Advanced Search
- How to Create a New Contact
- How to Add to an Existing Contact
- How to Create New Cases
- Using URL Variations to Access Case and Contact Information

Dashboard Overview

The *Dashboard* is an optional display of real-time metrics (i.e., statistics updated every five seconds) related to your and your team's performance. For example, it can display the current number of calls in the service queue.

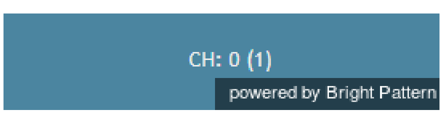
When enabled, the Dashboard is located in the middle of the application's status bar (the same bar that is used to display and select your current state). The metrics displayed on your Dashboard will be configured by your contact center administrator. The Dashboard can help you stay mindful of your work and keep a productive pace.

Click to learn more about Dashboard metrics and statistics.

Articles

The following is a list of articles in this section:

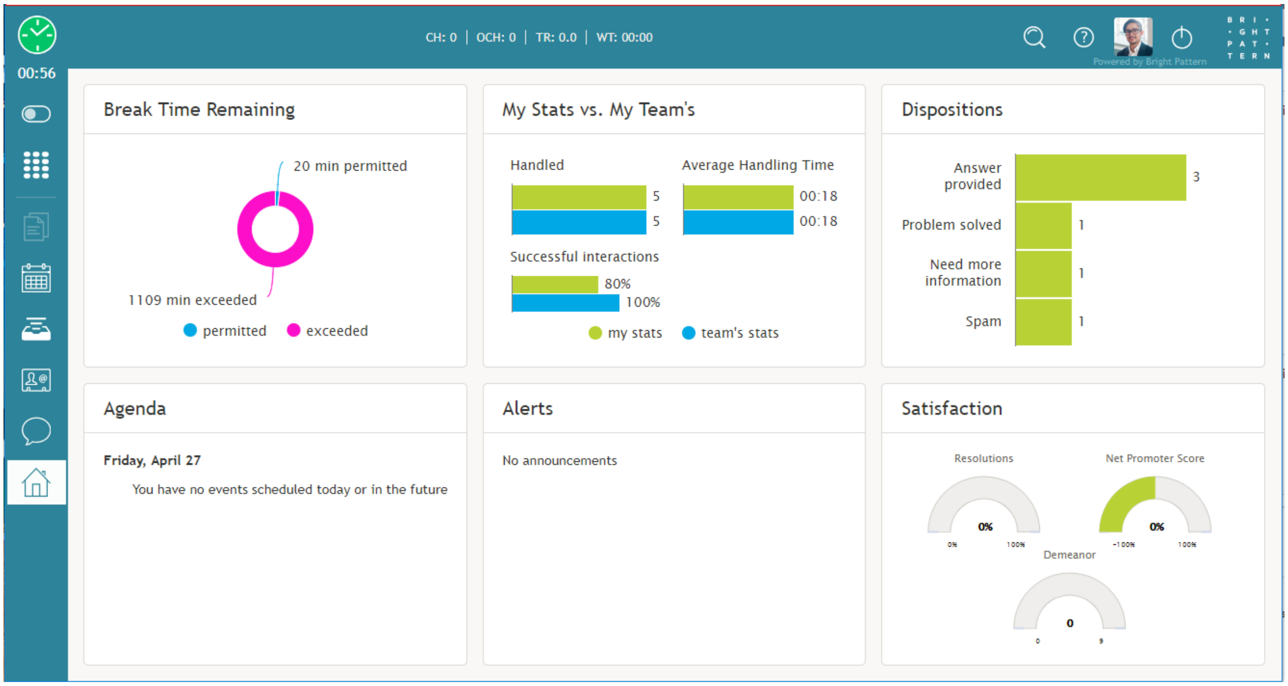
- Metrics
- Auxiliary Metrics



Example of an active Dashboard

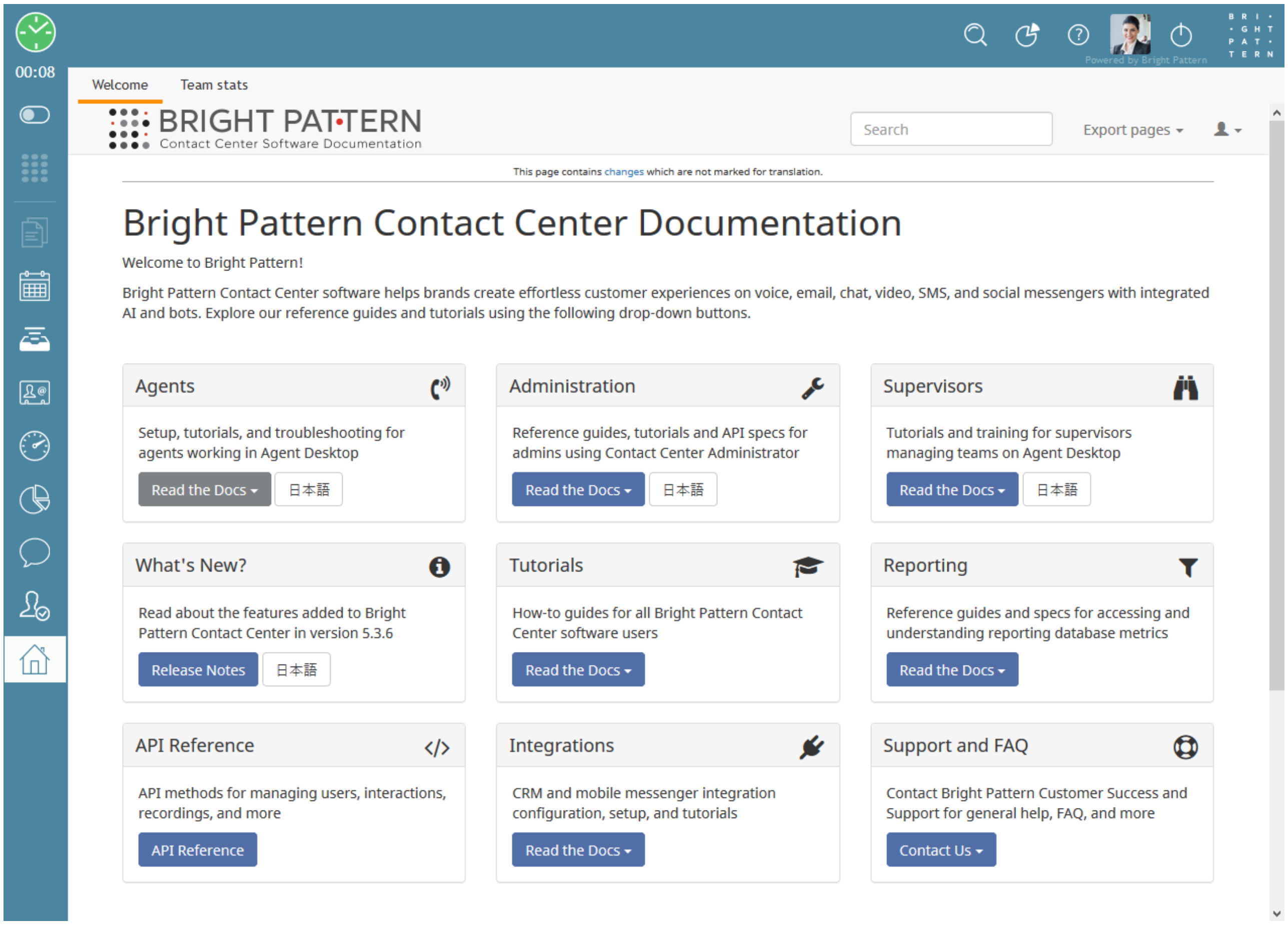
Home Page Overview

The *home page* displays widgets containing metrics that allow you to monitor key areas of your and your team's performance. You can change the placement of the widgets and configure some widget metrics.



A general view of the home page

Depending on your contact center configuration, your Home Page can also display an external web page. If defined, access to this web page will be available to you at any time while you are logged on.



A Home Page with a displayed external web page

Home Page Widgets

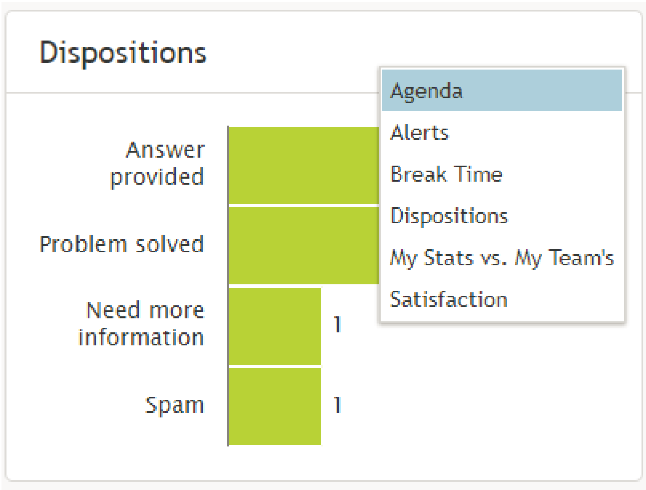
There are six widget options within the home page as well as six slots for these widgets to be displayed. The widgets available for display are:

- Agenda
- Alerts
- Break Time Remaining
- Dispositions
- My Stats vs. My Team's
- Satisfaction

For explanations of what is displayed within these widgets, see Home Page Widgets.

Changing Displayed Widgets

To change the widget displayed in a given slot, click the **down arrow** located in the upper right-hand corner of a widget. This will produce a drop-down menu that allows you to choose any of the widgets for display.



Choose the widgets you see on the home page by selecting from the drop-down menu

Knowledge Base Overview

Knowledge Base is a repository of articles that help you quickly find answers to customer inquiries and improve response times by providing predefined/approved text for your replies to the customers. Depending on your service configuration, some articles may be offered to you as templates, which you only need to review and, if necessary, customize slightly before sending them as replies to customers. Other articles may provide more general knowledge that you may need when handling typical customer inquiries within a given service.

Articles can be arranged in multi-level folders that will usually correspond to the different categories of knowledge within your organization. You can browse the Knowledge Base content using the folder and article names. You can also search for articles relevant to your task using some keywords (e.g., the name and model of the product that the customer has questions about).

For more information on how to use Knowledge Base articles in your replies, see section How to a Use Knowledge Base Article

As an agent, you may provide some comments about any article that may be used to improve its content and make it more helpful to you and other users. Depending on your qualification, you may also be able to create new articles in the Knowledge Base and edit the existing ones. For more information, see section Contributing Content to the Knowledge Base.

Note that the Knowledge Base content itself is fully customizable and specific to your organization. If the Knowledge Base is used in your contact center, you will receive a description of its content and detailed usage guidelines from your system administrator.

Tutorials

Learn more about using the Knowledge Base in this guide's Tutorials section.

- How to Contribute Content to the Knowledge Base
- How to Use a Knowledge Base Article

Mobile Interactions Overview

Customers have increasingly been able to contact businesses via applications that they download to their smartphones. Such applications were originally designed for self-service and web-form inquiries. More recently, however, web and mobile applications have begun to support live interactions, including chat, voice, and video calling. The picture below shows an example of a customer communicating with an insurance agent via a mobile chat application.

Thus, depending on your service configuration, you may be expected to handle interactions that customers initiate via such smartphone applications. Generally speaking, you handle mobile voice and chat interactions in the same way that you handle regular service calls and service chats. A few differences that you may need to be aware of while handling mobile interactions are discussed in the sections that follow.

Articles

The following is a list of articles in this section:

- Mobile Chat
- Mobile Voice
- Mobile Video

Mobile chat application example

Outbound Campaigns Overview

As an agent, you may be assigned to participate in outbound campaigns, where many customers are usually called for the same specific reason based on preconfigured calling lists. Depending on your contact center practices, such campaigns may operate in either *predictive*, *progressive* or *preview* mode.

Predictive and Progressive Modes

In Predictive and Progressive modes, the system will automatically dial customers' numbers from a calling list and monitor the call progress. Calls that are answered by customers will be connected to the agents participating in the campaign. Thus, in these modes, when you are in the *Ready* state and one of such calls is distributed to you, the ringing tone will sound and the call alert window will pop up on your desktop as if it were an inbound service call. The pop-up window will indicate the campaign name, the customer name, and the phone number.

For more information about the call alert and answering the call, see section How to Answer an Incoming Call. Note that depending on your contact center practices, predictive campaign calls delivered to your desktop may be automatically answered for you.

Preview Mode

In *Preview* mode, the system will send calling records from the campaign list to agents' desktops, giving the agents an opportunity to review customer information before making an outbound call. In this mode, calling records are distributed to you when you are in the *Ready* state. After accepting and reviewing the calling record, you will be able to dial its number(s) manually.

For more information, see section How to Review a Calling Record.

Call Handling

After a campaign call between you and the customer is established, further handling of such a call will be no different from processing of regular service calls. Note however, that in the outbound campaigns, selecting the correct disposition for each call as well as each unsuccessful call attempt is a critical, and usually a mandatory, part of call handling. For more information, see section How to Enter Dispositions and Notes.

During a campaign, at least some of the call attempts are likely to be connected to the called party's answering machines. Depending on the purpose of the campaign, you may be expected to leave a message in this case. Such a message may be prerecorded and played back to the answering machine, automatically allowing you to disconnect and make yourself available for the next campaign call. For more information, see section How to Use Pre-recorded Messages.

Tutorials

Learn more about handling campaign calls in this guide's Tutorials section.

- Reject a Calling Record
- Reschedule a Call Attempt
- Review a Calling Record

Understanding Screen-pop

Incoming interactions can be accompanied with web pages or forms that can provide additional information about the customer and/or the requested service. In this case, as soon as a new interaction is delivered to your Agent Desktop, you will see the corresponding webpage/form in the *Context Information Area*.

If the interaction is associated with one page or form, it will occupy the entire space of the*Context Information Area*. Some types of interactions may be associated with multiple pages/forms. In this case, the pages/forms will be arranged in a multi-tab view. The most relevant page/from will be displayed in the first tab called *URL*. To see other pages/forms, click the corresponding tabs--those tabs will usually have some descriptive names. You will get detailed information about the content and purpose of each tab from your system administrator.

Note: Depending on your system configuration, web pages and forms may appear in separate browser windows or tabs instead of the *Context Information Area*.

Agent Desktop temporarily stores the forms/tabs that you used for processing of the 10 most recent interactions. Any such forms/pages will be displayed when you select the corresponding contacts from the Recent tab. (If you log out or reload your browser, those forms/pages will no longer be available.)

1. REDIRECT #topic_agent-guide/work/searchandpreviewrecords/overview

States Overview

Agent *states* indicate your current availability to handle service interactions. State information is used by your contact center system to decide whether a new service interaction can be routed to you. The information about the time you spend in each state also appears in reports about your performance.

The Agent Desktop application uses icons to represent agent states. Your current state is shown in the upper left-hand corner of Agent Desktop. These icons, the states they represent, and descriptions of those states are described in the Tutorials section of this guide.

Tutorials

Learn more about states in this guide's Tutorials section.

- How to Interpret Your Current State
- Make Yourself Ready
- Make Yourself Not Ready

Voicemail Overview

After you have set up your voicemail, you will be able to receive notifications every time you receive a voice message.

Voicemail messages may be delivered to you as either email attachments or hyperlinks to a webpage where you can click to listen.

Articles

The following is a list of articles in this section:

- Listening to Voicemail Messages