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Purpose

The Bright Pattern Agent Guide provides instructions for using the Bright Pattern Contact Center Agent Desktop application to perform various telecommunication and customer service tasks in Bright Pattern-based private branch exchange (PBX) phone system and contact center environments.

Audience

The Bright Pattern Agent Guide is intended for

- contact center agents who will use the Agent Desktop application to provide customer service over the phone and other supported media channels
- back office employees who will use the Agent Desktop application for their business communications

Note that the Agent Desktop application also provides a set of functions for contact center supervisors and campaign operators. These functions are discussed in the Bright Pattern Supervisor Guide.

Readers of this guide are expected to be familiar with basic operations with Windows or Mac OS operating systems and Internet applications.

Selecting a Phone Device

During login, it is possible to make a selection of the device you will use to handle phone calls. Your system administrator will advise you about the option you should select on your first login. The selected option will be remembered for subsequent login attempts with this browser on your computer.

To select the device, click the current setting of the Phone device property in the login dialog box. A list of phone device options appears.

Phone device selection

Phone Device Options

Choose one of the following phone devices to use in the Agent Desktop application.
Softphone with computer headset

This device is a softphone application working as a phone in your computer. A high-quality headset is recommended for this option, such as Plantronics USB DSP series. When you select this option, the extension number assigned to you in configuration will be your phone number for the duration of the login session.

An internal phone

An internal phone is a hardware phone connected directly to the system. This can be a SIP-based phone on your desk, such as Polycom SoundPoint. Enter the desired phone number in the field next to this option.

An external phone

An external phone is any public phone number that can be dialed from the system (e.g., your home or mobile phone when working from home). Enter the desired phone number in the field next to this option.

Depending on your system configuration, once established, your external phone connection may be kept open even when the remote party hangs up. This is normal behavior that is sometimes used to optimize utilization of the established PSTN phone connections. If this option is used in your contact center, you will not need to hang up the phone on your side. Termination of a current active call will be indicated using a special tone. Arrival of the next call will be announced both visually via your Agent Desktop application and via another special tone on your open phone connection. You can accept this call using the Accept button on your screen. For more information, see section How to Answer an Incoming Call.

Note that the open line may be automatically disconnected if it stays open for longer than a few minutes without any active calls. If the open line is disconnected automatically or if you release it manually, arrival of the next call will be announced via the regular ringing signal. Your administrator will provide more information about the correct use of the external phone and any configured timeouts.

Default phone

Default phone is a hardware phone permanently assigned to you in the system configuration.

Dial-in and keep line open

Also known as a nailed connection, this option allows you to establish a phone connection with the system from any phone upon login and use this established physical connection for handling of all subsequent calls within your login session. If this option is used, the phone number to call for the initial connection will be provided to you by your administrator. Arrival of calls will be announced both visually via your Agent Desktop application and via a special tone on your open phone connection. You can accept these calls using the Accept button on your screen. For more information, see section How to Answer an Incoming Call. Termination of active calls will be indicated via another special tone.

Normally, the line will be kept open until you log out of the Agent Desktop application. If your application or browser are closed without a logout while you have a customer call, the system will wait for this call to be released by the remote party before closing the nailed connection. See section How to Terminate Your Working Session for more information.

No phone

You can use this option if you plan to work with text-based interactions only (i.e., chat and email).
Logging into Agent Desktop

**Step 1: Enter login credentials.**

- In the **Username** and **Password** fields of the dialog box, enter the username and password provided to you by your system administrator. Do not change other fields of the dialog box unless instructed to do so by your system administrator.
- Click the **Log in** button.

**Step 2: Confirm permissions and change password (if needed).**

If this is your first time logging in to Agent Desktop, you may be asked to confirm your permission to show notifications from this web page. Confirm your permission to display notifications.

If you forgot your password, you may request it by clicking the **Forgot password** link. Password recovery instruction will be sent to you by email. Note that in order to receive those instructions, your email address must be associated with your user account in the Bright Pattern Contact Center Administrator system. If in doubt, contact your administrator to have your password reset manually.

Once logged in, you can change your password via the settings menu in the top right corner of your application screen.

To change the password:

- Click your **User Profile** photo icon. Note: If you have not uploaded a photo to your user profile, click on the **Settings** icon instead.
- Select the **Change Password** option.
Click the Settings icon to change your password.

Depending on your contact center security policies, you may also be required to change your password upon initial login and/or at regular time intervals (e.g., every 90 days).

**Step 3: Navigate the user interface.**

Successful logging into the Agent Desktop application marks the beginning of your working session. Your current status will be displayed in the upper-left corner of the application screen.

Agent status is set in the upper left-hand corner of Agent Desktop.

If you are an agent, depending on your contact center practices, you may be assigned either the *Not Ready* or *Ready* state upon login. If the *Not Ready* state is assigned, you will not receive any service calls until you manually change your state to *Ready*. If the *Ready* state is assigned, you may receive an interaction immediately upon login. See How to Interpret Your Current State Information for more information about the agent states and how to change them.

If you are not an agent, you will be assigned the status *Available* immediately upon login. This status indicates to your colleagues your availability to communicate. If you prefer not to be disturbed by incoming calls or instant messages, consider manually changing your status to *Not Ready* by clicking the drop-down menu icon below the current status indicator. For more information about availability indicators, see section How to Use the Directory.

Some of the functions described in this guide may not be available to you. This usually means that either the corresponding capabilities are disabled in your contact center, or you do not have the permissions to use the function in question. If you believe that you need access to such functions in order to perform your tasks, contact your system administrator.
Installing and Updating the Agent Desktop Helper Application

Although Agent Desktop is a browser-based application, a small subset of its functions is implemented in a software component that you may need to download and install on your computer. This component is called the Agent Desktop Helper Application. Thus, when you start the Agent Desktop on your computer for the first time, you may see a warning message such as the message shown.

The exact text of the message and your actions will depend on the type of browser you use. Follow the instructions of the message to install and enable the Agent Desktop Helper Application component on your computer.

If You Do Not See a Warning

If you do not see the warning message when you log into your computer for the first time, this usually means that the Agent Desktop Helper Application component has been preinstalled for you. You can check if the component is installed on your computer by looking up its name in the list of installed programs (Windows Start Menu > Control Panel > Programs and Features).

If You Use Chrome

For the Chrome browser, you should also check whether the corresponding Agent Desktop Chrome Extension is installed and enabled in your Chrome browser (Chrome > Settings > Extensions).

If You Use Internet Explorer 11
If you use Internet Explorer 11 or higher as your browser for the Agent Desktop login application, the browser's Enhanced Protected Mode must be disabled in order for all Agent Desktop application logs to appear in the same folder (C:\Users\<UserName>\AppData\Local\Temp\logs).

To disable the Enhanced Protected Mode:

1. In the browser application, click Tools (Alt+X) and select Internet options.
2. Click the Security tab, and unselect the Enable Enhanced Protected Mode checkbox.
3. Click OK.

From time to time, the Agent Desktop Helper Application may have to be updated to support new system functionality. When a new version of this component becomes available, you may see a warning message similar to the one discussed above prompting you to upgrade. Follow the instructions of the message to update and enable the Agent Desktop Helper Application component on your computer.

Your attempts to install/update Agent Desktop Helper Application may be blocked by your browser (depending on its security settings) and/or some anti-virus software running on your computer. Typically, in this case, you will see a warning message asking you either to cancel or confirm the download/install. Choose the confirm/allow/proceed option to proceed with the installation/upgrade. If in doubt, contact your system administrator.

User Interface Overview

The Agent Desktop application user interface is shown with an active call. Its main elements are shown, and these elements are often referred to in the subsequent sections of this guide.

![The elements of Agent Desktop](image)

Menu Elements and Functions (at left side of Agent Desktop)

The elements of the Agent Desktop application screens perform the following functions.

**Active Conversations List (ACL)**
The *Active Conversations List* shows all your active interactions. For example, if you make a consultation call while holding a service call, this list will show them as two separate items. When you select a particular call or chat from this list, more information about this interaction and the related controls will appear in the *Contact Info Panel*. When you select an email from this list, the email content and the related controls will appear in the *Context Information Area*. For emails, the *Active Conversations List* also provides access to your team email queue, your personal email queue, and case history.

### Contact Info Panel

The Contact Info Panel provides information about and controls the interaction selected in the *Active Conversations List*. This is the area of the application that you will use most often to handle your active (established) calls and chats.

The Contact Info Panel contains the following:

- *Service Selector* for associating calls with the specific services your contact center provides
- *Number Input Field* for entering phone numbers for outbound and internal calls
- *Directory and Dial Pad* for accessing your company's directory of users and accessing the standard phone dial pad

### User Status Indicator/Selector

The *User Status Selector and Indicator* displays your current state and, when clicked, a drop-down list of other states to select. You can use the selector to change your state manually.

For more information, see section *Understanding and Handling Your States*. 
Changing your agent state

**Timer**

The timer indicates the time spent in the current agent state.

**Conversations**

To show or hide the Active Conversations List in the Context Information Area, click the Conversations icon. When the Active Conversations List appears, you can access the Directory, Favorites, Recents, and Dial Pad.

The contents of your Context Information Area (at the center of the Agent Desktop) depend on what you are currently doing while logged in to Agent Desktop. For example, in the screenshots shown, the user is viewing the *My Grades* section of Agent Desktop while navigating to Conversations.

Notice the difference between the two Agent Desktop views shown.

Click the Conversations icon to display the Active Conversations List
The Active Conversations List appears on the Agent Desktop

**Directory and Dial Pad**

The *Directory and Dial Pad* provides quick access to the following:

- *Directory* for browsing users in your contact center
- *Favorites* for creating your personal list of frequently called numbers
- *Recent Contacts* for viewing your previous call attempts
- *Dial Pad* for accessing the standard phone dial pad
- Numeric entry field for quickly initiating calls and conference calls

The Directory stores the names, numbers, profile photos, and user status (logged in or not logged in) of users in your contact center. Users are organized according to teams, and you can expand or collapse the full list of users within each team.

Mousing over a user's name causes the phone icon and the chat icon to appear. Clicking on the phone icon will initiate a call to that user. Likewise, clicking on the chat icon will initiate a chat to that user.
Making an internal call

During an active chat, clicking on the Directory and Dial Pad icon will cause the chat conversation to appear in the Contact Info Panel. Clicking on the icon again will switch your view back to the Directory and Dial Pad.

Text Input Field

The Text Input Field allows you to enter messages for real-time text-based interactions, such as service chat, SMS, and internal chat.

Type your message in the Text Input Field

Selected Conversation's Documents

If a conversation or case has been selected on the Agent Desktop, the email messages, chat messages, or other documents associated with the conversation will be displayed in the Context Information Area.

Calendar

Click the Calendar icon to view and edit the user's calendar in the Context Information Area. For more information, see section How to Open the Calendar.
My Cases

Click My Cases to work with email cases from your Team Queue, Personal Queue, or Follow-ups in the Context Information Area. For more information, see section General Information About Handling Email.

My Cases contains your email cases

Contacts
Click *Contacts* to search and view contact information for the people in your directory, cases, and recent contacts list.

**My Cases**

**Supervision**

The Supervision icon is shown only to supervisors logged in to Agent Desktop.

**Chat Center**

Click *Chat Center* to initiate chats with chat groups or personal chats with other users in your organization.

**My Grades**

Click *My Grades* to view metrics related to your and your team’s performance in the Context Information Area. For a more detailed explanation, see [General Information About My Grades](#).
Controls Area (at top right of Agent Desktop)

This area on the user interface provides access to help materials, application settings, and the log out function.

Contact Search

Click the Contact Search icon to display a text field for searching your contacts.

Wallboard

Clicking the Wallboard icon will direct you to the Wallboard Builder application in a new browser tab or window. Wallboards display statistics and informational widgets about your current performance and/or performance of your team. If you have the privilege to edit wallboards, you can customize them from the Wallboard Builder application.

Help

Click the Help icon to access help materials, such as links to documentation, HR, and procedures.
Agent Desktop Help

**Settings**

If you have not uploaded a user profile photo, Agent Desktop Settings is shown as a cog icon. If you have already uploaded a user profile photo, that same image is shown in place of the cog icon. Click either icon to update your settings.

**Log out**

Click *Log out* to log out of your working session.
Context Information Area (at center of screen)

The Context Information Area displays web pages and forms that can be used to provide the information you need in order to serve your customers (e.g., customer profile) and enter new information based on your conversation with the customer (e.g., a purchase order). The appearance of content in this area is often synchronized with the delivery of a customer interaction to your desktop (e.g., during call ringing). For more information, see section Understanding Screen-pop.

The Context Information Area is also used for the following:

- Your grades and wallboards
- Standard email processing functions such as message reviewing, reply editing, and case search
- Knowledge Base
- Pop-out chat panels
- The display of data received from customers during chat sessions
- Teams and services dashboards
- Calendar display

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/form 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.)

Configuring Your User Profile
Your user profile is a collection of information about you that may be relevant to the tasks assigned to you as an employee. Typically, you can enter and/or edit your profile yourself. For example, the chat nickname you select for yourself may be displayed to customers, and they will be likely to use that nickname when chatting with you.

Navigate to *Settings > User Profile* to view and edit your profile data.

Some elements of your profile may be preconfigured for you by your system administrator. Whether you can change such preconfigured profile elements, and whether you are expected to enter and subsequently update any undefined elements of your profile, depends entirely on your contact center practices. You will receive detailed instructions regarding your profile setup and maintenance from your system administrator.

**Elements**

The elements of your user profile are divided into tabs. They are explained as follows.

**User profile tab**

**First name**

This is your *first name*.

**Last name**

This is your *last name*.

**Title**

Title is your job *title*.

**Language**

*Language* is your preferred language. This property is used for information only and does not affect the process of delivery of customer interactions to you. If, as an agent, you provide services in different languages, those languages will be configured as your skills by your system administrator elsewhere in the system.
This setting also does not affect the display language of your Agent Desktop user interface. The display language is determined by the language settings of your browser and availability of the Bright Pattern product in this locale.

About me

You can optionally provide more information about yourself.

Photo

If uploaded to your profile, your photo will appear in the Contact Info Panel of the Agent Desktop applications of other employees during your internal communications. Depending on your contact center configuration, this photo may also be displayed to customers when they communicate with you using chat. To upload the photo, hover over the photo area and click Change photo. To remove the photo, hover over the photo area and click the “x” symbol in the upper right corner.

The default maximum size of uploaded photos is 10 MB; the photo will be compressed to fit the user interface elements where it is displayed. Note that the maximum size of uploaded files may be further limited by your system administrator.

Contact Info tab

Chat nickname

Chat nickname is the name that will be displayed to other parties when they communicate with you via chat.

Phone extension

The phone extension is the number assigned to you in the system. It is read-only.

Work phone

Your direct work phone number is used for information only. For the duration of your working session, your phone number will be determined by the phone device option that you selected at the time of login.

Mobile phone

You mobile phone number is used for information only. For the duration of your working session, your phone number will be determined by the phone device option that you selected at the time of login.

Email

This is your email address. The system will use this address for delivery of password reset instructions and your voicemail messages. It must be specified if you have permission and intention to use voicemail. For more information about voicemail deliver, see section Listening to Voicemail Messages.

Location tab

Time zone
This property is the *time zone* where you normally reside. It is used for information only. For any time-dependent tasks, the system will determine your time zone based on your contact center configuration.

**Country**

This is the *country* where you normally reside. This property is used for information only.

**State/Province**

This is the *state or province* where you normally reside. This property is used for information only.

**City**

This is the *city* where you normally reside. This property is used for information only.

---

**Forwarding and Voicemail tab**

**Forward all calls for ext. XXXX to**

Select the checkbox and enter a phone extension to enable call forwarding.

**Forward on no answer after**

Specify the number of seconds to wait before forwarding a call.

**Enable voicemail (requires email address)**

Select the checkbox to enable voicemail.

**Send to voicemail after**

Specify the number of seconds to wait before the voicemail is emailed.

**Use the following greeting for voicemail**

Select the voicemail greeting you would like to use.

Refer to the section [Configuring Your Voicemail](#) for detailed instructions on how to set up voicemail.

---

**Configuring Your Voicemail**

Calls made directly to your extension number can be forwarded to your voicemail when you cannot answer them. You can record your personalized voicemail greetings and activate/deactivate your voicemail via your Agent Desktop application. Up to three different messages can be recorded and used as greetings in various situations.

Note that the system uses email for [delivery of voicemail messages](#). Before you configure your voicemail settings, make sure that you have an email address specified in [Settings > User Profile > Contact Info > Email](#).

**Step 1: Navigate to the Forwarding and Voicemail tab of the user profile settings.**
Click **Settings**, select **User Profile**, and click the **Forwarding and Voicemail** tab.

- Note that this tab contains settings related to call forwarding and voicemail functions. If you do not see any setting related to voicemail, unselect the **Forward all calls...** checkbox first.
- Notice the fields for *Enable voicemail (requires email address)* and *Send to voicemail after* but do not make changes to them yet. You will come back to these fields after you have recorded your voicemail greetings.

---

**Forwarding and Voicemail Settings**

**Step 2: Create a personal greeting.**

The system provides a prerecorded generic voicemail greeting: *The person at extension [your extension number] is not available. Please leave a message after the tone.*

You can replace this generic greeting with a personal greeting recorded in your own voice. (If in doubt whether you may/should use personal greetings, ask your system administrator.)

- Select the first radio button under the **Use the following voicemail greeting** setting. If you do not have any saved greetings, you will see << Not set >> beside the button.
- Click the **edit/record** link.
- Prepare the text of your greeting.
- Put on your headset.
- In the window that appears, specify the greeting title (e.g., *My everyday greeting*.)
- Click the **Start recording** button. You will hear a single ringing tone, which indicates the beginning of the recording. The button appearance will change to show the **stop** control.
- Speak your greeting into the microphone. When you are finished, click the **Stop recording** button.

---

**Creating a personal voicemail greeting**

**Step 3: Check your recorded greeting.**
To check your recorded greeting, click the playback button. If you are not satisfied with your greeting, repeat step 1 and step 2 of this process. Otherwise, click Ok to confirm. You can review your greeting at any time afterward, change the title, and/or rerecord the greeting itself.

You can prepare up to three different greetings that can be used in various situations (e.g., everyday, travel, vacation). To record another greeting, select an “unused” radio button and repeat the process, starting with step 2.

**Step 4: Enable your voicemail.**

Once all your greetings are recorded, you can enable your voicemail.

- Use **Send to voicemail after** to specify the no-answer timeout (i.e., the time in seconds after which an incoming call will be forwarded to voicemail when you are logged in and cannot answer it). Note that when you are logged out or if you are logged in with option **No phone**, incoming calls will be sent to your voicemail immediately regardless of this setting.

- If you have multiple greetings, under the **Use the following voicemail greeting** setting, select the radio button corresponding to the greeting to be used at this time.

- Select the **Enable voicemail for ext...** checkbox. Your voicemail is now activated.

**Additional Information**

- You can select another personal greeting as your current greeting at any time without disabling and re-enabling your voicemail.

- Instead of recording your voicemail greetings via the Agent Desktop application, you can record them offline and store them as audio files. The process of configuring your greetings is the same, except for step 3 and step 4; instead of recording controls, you click the **Upload** button and select the desired audio file.

- All voicemail settings can be preconfigured for you and changed at any time by your system administrator. This includes the upload of greeting audio files, the selection of the current greeting, setting the no-answer timeout, and activation and deactivation of voicemail.

- **Call forwarding** settings take priority over the voicemail settings. A temporary activation of call forwarding will automatically disable the voicemail function; however, your existing voicemail configuration (the no-answer timeout and current greeting) will be preserved and will take effect as soon as call forwarding is deactivated.

**Listening to Voicemail Messages**

If your **voicemail function** is enabled, you will receive an email notification every time someone leaves you a message. The system may be configured to attach voicemail recordings as audio files to such emails. Alternatively, the system may only email you a link and ask you to authenticate yourself before you can listen to the message.

If a voicemail recording is delivered to you as an attachment, you can open the attached file directly from within the email message. The file will be opened for playback in your default media player. Subsequent operations with this file may be governed by certain policies of your organization; from the technical standpoint they are not different from operations with any other email attachments that you can open at any time, forward to other people, save on your computer for later use, and so forth.

**Links**
If the email notification contains a link, click the link.

**While logged in to Agent Desktop**

If you click the link while logged in to the Agent Desktop application, the system will immediately place a call to the device that was selected at the time of login.

**While not logged in to Agent Desktop**

- If you are not logged in to the Agent Desktop application, a new browser tab or window will appear with a login dialog.
- Enter your username and password. These are the same username and password that you use to log in into the Agent Desktop application.
- Click the **Log in** button. The system will try to place a call to the phone that is permanently assigned to you in system configuration (default phone).

You will be alerted about the above call as if it were a regular incoming call.

**Playback**

Playback of the voicemail message will begin as soon as you answer it. You can use the dial pad of your Agent Desktop application or your regular phone to control the message playback.

The following controls are available to you during playback:

- To replay the previous 10 seconds of the message, press 1
- To skip the next 10 seconds of the message, press 3
- To replay the previous 30 seconds of the message, press 4
- To pause or resume playback, press 5
- To skip the next 30 seconds of the message, press 6
- To replay the message from the beginning, press 7

After the message playback is finished, you can release the call as if it were a regular phone call. Otherwise, the system will wait for 15 seconds before disconnecting this call automatically. This gives you a chance to replay the message by pressing 7.

To listen to the message again after the call is disconnected, open the original email notification, and click the link. Even if you are not logged in to the Agent Desktop application, you will not need to re-authenticate yourself provided that you click the link within five minutes of your initial voicemail login.

**Storage**

By default, the system stores voicemail messages for 90 days. However, since this is a configurable parameter, you should confirm the storage period with your system administrator.

**Call Forwarding**

You can use the call forwarding function to redirect incoming calls that you cannot answer to another designated number where they are more likely to be answered. You can specify the forwarding number and activate/deactivate call forwarding via your Agent Desktop application at any time.
Note that call forwarding only works for direct calls, and it is always turned off for queued calls. Queued calls are always directed to the phone number that you are logged in with (even if forwarding is configured for that number).

**Screen Properties**

**Forward all calls for ext...**

This checkbox indicates whether call forwarding is activated for your phone extension.

Note that call forwarding takes priority over voicemail. If you have had voicemail enabled (see below), activation of call forwarding will automatically disable the voicemail function.

**to**

The to field represents the phone number to which incoming calls will be forwarded. The phone number must be specified if the Forward all calls to ext... checkbox is selected.

**Forward on no answer after**

Forward on no answer after is the time (in seconds) after which incoming calls will be forwarded to the number specified if you are logged on and do not answer. The amount of time must be specified if the Forward all calls to ext... checkbox is selected. For immediate (unconditional) forwarding, set the timeout to 0.

If you are busy or logged out, incoming calls will be forwarded to the specified number immediately, regardless of this setting.

**Enable voicemail**

The Enable voicemail checkbox indicates whether the voicemail function is enabled for you.

Note that call forwarding takes priority over voicemail. The voicemail function cannot be enabled if the you already have call forwarding activated. If you have had voicemail enabled, a temporary activation of call forwarding will automatically disable the voicemail function; however, the voicemail configuration (the No Answer timeout and current greeting) will be preserved and will take effect as soon as call forwarding is deactivated.

**Send to voicemail after**
Send to voicemail after is the time in seconds after which an incoming call will be forwarded to voicemail if you are logged on and do not pick up the call. The amount of time must be specified if the Enable voicemail checkbox is selected.

If you are busy or logged out, incoming calls will be sent to the user’s voicemail immediately, regardless of this setting.

**Use the following greeting for voicemail**

This option lets you upload or record up to three different personal voicemail greetings and select which one should be used. For more information, see section Configuring Your Voicemail of the Agent Guide.

**How to Configure and/or Activate Call Forwarding**

1. Click Settings, select User Profile, and click the Forwarding and Voicemail tab.
2. Use Forward all calls for ext... to specify the forwarding number.
3. Use Forward on no answer after to specify the no-answer timeout (i.e., the time in seconds after which an incoming call will be forwarded when you are logged in and cannot answer it). When you are logged out or if you are logged in with option No phone, incoming calls will be forwarded immediately regardless of this setting.
4. Select the Forward all calls for ext... checkbox. The forwarding function is now activated.

**Additional Information**

Your personal call forwarding settings will work for all phone device options except internal phone and default phone. For internal phone and default phone, forwarding settings configured for the corresponding hardphone numbers will be applied. You can check those settings with your system administrator.

All call forwarding settings can be preconfigured for you and changed at any time by your system administrator. This includes the forwarding number, the no-answer timeout, and activation and deactivation of the forwarding function.

Call forwarding settings take priority over the voicemail settings. A temporary activation of call forwarding will automatically disable the voicemail function; however, your existing voicemail configuration (the no-answer timeout and current greeting) will be preserved and will take effect as soon as call forwarding is deactivated.

**Getting Help**

The Help guide is your main source of information for using the Agent Desktop application to perform various interaction handling tasks. You can access this guide directly from the Agent Desktop. To access the guide, click the Help icon in the application's upper bar, and select Agent Guide in the dialog window that appears. The guide will open in a separate tab or window of your browser.

In addition to the standard Agent Guide, the Help guide may include links to materials specific to your organization, such as customer service guidelines and best practices. Your system administrator can provide more information about the content and purpose of such materials.
How to Terminate Your Working Session

To terminate your working session click the **Logout icon** in the upper right corner of the desktop.

A dialog window will appear asking you to confirm the intention to terminate your working session.

Click **OK** to confirm.

- If you have an active call or chat on your desktop, the system will let you finish its processing before logging you out.
- If you have any unfinished emails on your desktop, you will be allowed to log out immediately. The unfinished emails will be saved as drafts in your personal queue, and you will be able to finish their processing the next time you log in.

After you have logged out, the browser tab will show the **Login dialog**. You can leave the browser tab open if you plan to log back in shortly. Otherwise you can close the browser tab.
**Note:** If, instead of using the Logout command, you close the browser tab or the browser application, a standard browser dialog will appear asking you to confirm your intention to leave the web page. If you confirm, your Agent Desktop application will be closed and you will be logged out of the system automatically in about 15 seconds.

---

**When Your Browser Closes or Navigates Away**

You may see a prompt similar to the one shown below. The exact text of the prompt will depend on the type of your browser, but the meaning will be the same.

![Closing browser window or tab](image)

It means that Agent Desktop will stop operation if you click the **Leave this Page** button. You will have 15 seconds to log back in to keep your active interactions before they are automatically disconnected.

---

**How to Interpret Your Current State Information**

The agent state is the indication of your current availability to handle service calls. This information is used by the system to decide whether a new service call can be delivered 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 as follows.

**Note:** Information in the main text of this section is valid if your system is configured to let you handle one customer interaction at a time. This configuration is most typical when you handle calls only. If you process interactions of other types (e.g., chats or emails), then, depending on your contact center practices, you may be expected to handle multiple interactions simultaneously. The differences in interpretation of your states in this case are briefly explained in the notes following a state description. For a more detailed explanation, see sections [Handling Multiple Chat Sessions](#) and [General Information About Handling Email](#).
Agent States

Ready

You are available to take a service call. In most cases, you make yourself Ready manually. See How to Make Yourself Ready for more information.

Depending on your contact center practices, the Ready state may also be applied automatically under some of the following conditions:

- Upon login
- As soon as you finish a previous service call
- When the time allocated for after-call work associated with the previous call expires
- When the rest time associated with the previous call expires

You may also be forced into the Ready state by your supervisor.

Note: If you are expected to handle multiple interactions simultaneously, the Ready state will only be applied when you do not have any active interactions on your desktop. However, in this case you may receive new interactions in states other than Ready.

Ringing

You are unavailable to take service calls because one service call is already being delivered to you. The ringing icon is briefly displayed while your phone is ringing.

Busy

You are unavailable to take new service calls because you are already handling a service call. This state is displayed from the moment the call is connected and until it is released. For outbound calls, it also includes the call dialing phase. When your service call is released, depending on your contact center practices and the services that you provide, you will be switched automatically to either the After Call Work state, the Not Ready state, or the Ready state.

Note: Even if you are expected to handle multiple interactions simultaneously, your state will be displayed as Busy as long as you have at least one active interaction of any media type. However, your actual availability will depend on the number of interactions you are currently handling versus the maximum number of interactions you are expected to be able to handle simultaneously. Therefore, you may receive new interactions when you are in the Busy state.

After Call Work
You are unavailable to take new service calls because you are processing information related to the call that you previously handled. This state may or may not be used depending on your contact center practices and the services that you provide. If it is used, you will be switched to this state automatically as soon as the call is released by either the customer or yourself. You will remain in this state until you manually make yourself Ready or Not Ready to take another call. Note that your After Call Work state may also end automatically if the time allocated for the after-call work exceeds the limit set by your administrator.

**Note:** If you are expected to handle multiple interactions simultaneously, you may receive new interactions when you are in the After Call Work state. You will be switched to this state only when the last live interaction on your desktop is finished. (Otherwise, you will continue to be in the Busy state.)

**Not Ready**

You are unavailable to take service calls because you are temporarily away from your desktop or busy doing some work that is not directly related to handling of service calls. Under normal circumstances, you make yourself Not Ready manually. Your system may also be configured to let you indicate a specific reason for being Not Ready. For more information, see How to Make Yourself Not Ready and the following Not Ready agent states: Lunch, Away From Desk, and Break. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.

Depending on your contact center practices, the Not Ready state may also be applied automatically under some of the following conditions:

- Upon login
- As a short rest time after finishing processing of a service call
- Upon rejection of a service call
- If you do not answer a ringing service call within a reasonable time
- When your Agent Desktop loses connection to the system

You may also be forced into the Not Ready state by your supervisor.

**Note:** You will not receive any interactions while you are in this state regardless of how many interactions you are expected to handle simultaneously.

**Lunch**

You are unavailable to take service calls because you are on your lunch break. Under normal circumstances, you manually set the agent state to Lunch or some other Not Ready reason. See How to Make Yourself Not Ready for more information. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.

**Away From Desk**
You are unavailable to take service calls because you are temporarily away from your desktop. Under normal circumstances, you manually set the agent state to *Away From Desk* or some other Not Ready reason. See [How to Make Yourself Not Ready](#) for more information. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.

**Break**

You are unavailable to take service calls because you are taking a break. Under normal circumstances, you manually set the agent state to *Break* or some other Not Ready reason. See [How to Make Yourself Not Ready](#) for more information. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.

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**How to Make Yourself Ready**

You manually make yourself *Ready* to indicate your readiness to handle interactions. You can make yourself *Ready* if your current state is either *After Call Work* or *Not Ready*.

To make yourself *Ready*:

1. Click the **User Status Indicator/Selector**.
2. Select *Ready* from the drop-down menu or press **F9**.

Making yourself Ready

Your state changes to *Ready*. You may now receive an interaction matching your qualifications at any time.

**How to Make Yourself Not Ready**
During your working session, you may need to make yourself temporarily unavailable to handle interactions (e.g., to take a scheduled break, to have a meal, or to attend a meeting). You may be required to indicate a specific reason for becoming unavailable every time you make yourself Not Ready. You can make yourself Not Ready if your current state is either Ready or After Call Work. You can also change reasons for being Not Ready.

First, specify why you are Not Ready.

- Click User Status Indicator/Selector.
- From the drop-down menu, select Not Ready or any specific reason for becoming not ready, such as Break or Lunch. The exact set of reasons is specific to your contact center.
- You can also press F8, select the desired Not Ready state with the cursor keys, and press Enter.

Making yourself Not Ready

Your state changes to Not Ready. You will not receive any service calls while you are in this state. You will have to make yourself Ready manually when you are ready to take service calls again. See How to Make Yourself Ready for more information.

Note that you can request Not Ready to be your next state while you are in the Busy state (i.e., while actively handling an interaction). Your current state will not change, but the system will note your desired next state and will switch you to this state after you finish processing the current interaction. The requested Not Ready state will be displayed as Next under the current state display.

**Note:** If you have two or more active interactions on your desktop, you will only be switched to the requested Not Ready state after you finish processing all those interactions. However, you will stop receiving new interactions as soon as you request Not Ready.

General Information About Conversations
Conversations in Agent Desktop refer to active sessions between you and your customers. A conversation can be as simple as a single phone call or as complex as several media interactions happening concurrently. For example, a conversation can begin by chatting with a customer but then you call them within the same session. The customer can then end the call but continue the conversation by chatting with you again, or even sending an SMS. Conversations happen in the Active Conversations List. Relevant conversation information also appears in the Selected Conversation Documents section. When your conversation has ended, all information is saved in the Contacts section.

Christy processes a call from Jeanne

**Omnichannel Capabilities Aid Conversations**

When several media interactions happen in a conversation, this is made possible with Agent Desktop's unique omnichannel abilities. Omnichannel, also known as multichannel, is the result of combining every media channel and every media type together in one place.

Channels are the types of media used by customers to contact your business. Agent Desktop recognizes the following channels:

- Phone calls
- Chat
- SMS
- Multiple messenger services
- Email
By incorporating so many channels, Agent Desktop enhances your ability to fulfill your customer's needs. Each conversation can be catered to your customer's channel preference, allowing you to provide the best experience possible.

**All Conversations Saved**

When a customer contacts your help center, Agent Desktop recognizes and stores their contact information. From then on, no matter how many different channels they use or times they contact you, all conversations are stored under their contact information. This can be found under Activities in the Contacts section. These saved conversations also make it possible to follow up with your customer at a later time. For more information, please reference Using Contacts to Aid Conversations.

**More Examples of Conversations**

The following examples illustrate more ways Agent Desktop allows you to have easy, fluid customer conversations:

**Example One:**

You receive a call from a customer wanting to change their flight booking. While still on the call, you are able to email them their updated booking information.

**Example Two:**

You receive a chat message from a customer, but the customer must now drive to work. You provide them with a phone number and they continue the conversation with you directly on their headset while driving. Once the conversation is completed, you send them a summary over SMS.

**Example Three:**

While on a call with a customer, they indicate they can no longer talk but will be able to communicate via SMS. You switch to SMS communication and finish helping the customer quickly and easily.

**How to Answer an Incoming Call**

When a call is delivered to your desktop, you will hear a ringing tone in your headset and you will see a call alert pop-up window indicating an incoming call.
Call alert pop-up window

Your state will change from Ready to Busy, and the ringing icon will indicate the ringing phase of the call.

**Call Alert Window**

The call alert window will display relevant data that is dependent on the type of call.

- If the incoming call is a service call, the call alert window will display the service name to which the call was made.
- If the incoming call is an internal call from another agent or a supervisor, the call alert window will display the name and extension number of the calling party.

There are two buttons: Accept and Reject.

- To answer the call, click the **Accept** button.
- The *Active Communications List* will display the inbound call icon indicating that the call is now established and the timer for this call will start.

For service calls, depending on your contact center configuration, you may hear an announcement of the service number to which the call was made. The calling party will not hear this announcement.

You can now greet the calling party and begin a conversation.
Note: If you do not answer a ringing service call within a predefined amount of time, you will be automatically switched to the *Not Ready* state. You will receive a clear indication for the reason of being in the *Not Ready* state and will need to [make yourself manually Ready](#) when you are ready to receive another call. Unanswered service calls will appear in your performance and activity reports.

### How to Reject an Incoming Call

Typically, you will indicate your temporary unavailability to receive service calls by [changing your state to Not Ready](#) while handling a previous interaction. However, if a call was delivered to your desktop before you had a chance to make yourself *Not Ready*, you have an option to reject this call.

To reject a call that is ringing at your desktop, click the **Reject** button in the [call alert pop-up window](#).

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**Call alert pop-up window**

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**Rejection**

If you reject a service call, it may be returned to the service queue to be answered by another agent.

If you reject an internal call, the calling party will get the busy tone indicating that you are unavailable at the moment.

After rejecting a service call, you will be automatically switched to the *Not Ready* state. You will receive a clear indication for the reason of being in the *Not Ready* state and you will have to [make yourself Ready manually](#) when you are ready to receive another call.

Note: Rejected service calls will appear in your performance and activity reports.

### How to Make an Internal Call

Internal calls are calls you make to other agents and supervisors of your call center, as well as other employees that may be connected to your phone system.
Follow these steps to make an internal call.

1. In the Number Input Field, enter the extension number of the party you would like to call. To enter the number, you can use either the numeric keys of your keyboard or the Dial Pad tab. Note that you can also use the Recent Contacts, Directory, and Favorites to make calls to known internal contacts. In addition, you can click the click-to-call icon that appears next to contacts in your directory upon mousing over the contact's name.
2. If the internal call you are making is associated with a particular service that you provide, click the drop-down menu below the Number Input Field, and select the desired service. Otherwise, choose None.
3. Click the Initiate call button.

If the called party is available, you will hear the ring back tone in your headset, and you will see a blinking outgoing call icon in the Active Communications List. When the called party answers, the outgoing call icon will stop blinking, indicating that the call is now established.

Note: Depending on your previous actions, instead of the Initiate call button, you may see the Initiate single-step conference button. This button is used to set up a conference with another active call on your desktop. In absence of another active call, this button can be used in the same way as the Initiate call button.

How to Make an Outbound Call

Outbound calls are calls you make to external numbers of a public telephone network.
Follow these steps to make an outbound call.

1. In the *Number Input Field*, enter the full telephone number of the party you want to call. Depending on your contact center configuration, you may also have to enter a prefix (e.g., "1") for access to the public telephone network before entering the telephone number itself. Sometimes, you may be required to dial different prefixes depending on the destination. You should receive instructions about the use of prefixes from your administrator. To enter the number, you can use either the **numeric keys** of your keyboard or the *Dial Pad* tab . Note that if you begin entering a phone number that you have manually entered and dialed previously, the system will automatically complete the rest of the phone number for you. You can also use the [Recent Contacts, Directory, and Favorites](#) to make calls to known outside contacts.

2. If the outbound call you are making is associated with a particular service that you provide, click the drop-down menu below the *Number Input Field* and select the desired service. Note that depending on your system configuration, a service may be automatically associated with the call based on the prefix of the number that you dial. If you are in doubt as to which service to attribute this call to, choose **None**. Consult your administrator for more specific instructions regarding service selection.

3. Click the *Initiate call* button .

**Note:** You can use the plus sign "+" to dial international calls. To enter the plus sign from the Dial Pad, click and hold the “0” button.

If the called party is available, you will hear the ring back tone in your headset, and you will see a blinking outgoing call icon in the *Active Communications List*. When the called party answers, the outgoing call icon will stop blinking, indicating that the call is now established.

**Note:** Depending on your previous actions, instead of the *Initiate call* button , you may see the *Initiate single-step conference* button . This button is used to set up a conference with another active call on your desktop. In absence of another active call, this button can be used in the same way as the *Initiate call* button.

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**How to Send Numeric Information**

When making an outbound call to a business number, you may sometimes be connected to an interactive voice application and asked to enter some numeric information. For example, you may need to enter the party's extension or select one of the available service options.

To enter numeric information, click the *Dial Pad* tab . Click the desired digit or a combination of digits.

You can also use the numeric keys of your computer keyboard to produce numeric tones when the Dial Pad tab is selected.

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**How to Use the Directory**
You can make calls to the users and contacts registered in your contact center directory by selecting them from the Directory tab. The directory will typically provide contacts of users in your organization grouped by teams. It may also contain external contacts. For internal contacts, the directory also provides information about their current availability to communicate.

To view directory contacts, click the Directory tab. The directory will initially list all teams configured in your contact center. External contacts will also be organized in folders. To see contacts of members of a particular team or folder, click the arrow icon next to its name.

You can also search for a contact 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 contacts will remain visible in the directory.

Display Icons

For each contact, the directory will display the name and phone number. For users, the directory will also display icons indicating their current availability to communicate. The icons have the following meanings.

**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.

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.

How to Redial a Previously Dialed Number

You can redial any of the up to a hundred of your most recent calls, which includes both users and contacts.

To redial the last dialed number, follow these steps:
1. Click the **Initiate call** button. The last previously dialed 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 again to connect to this number.

To redial one of the previously dialed numbers:

1. Click the *Recent* tab.
2. Select the number from the list that appears. The contact will appear in the *Number Input Field*.
3. If necessary, select the service as described in section **How to Make an Outbound Call**.
4. Click the **Initiate call** button.

**Note:** You may also initiate a redial by hovering over the user or contact record until the info card appears, then click the phone icon.

The previously dialed numbers in the *Recent* list will be marked with the outgoing call icon.

This list also contains the following:

- Records of successful incoming calls
- Missed calls
- Chat sessions
- Emails

**How to Use Favorite Contacts**

If agents have the privilege **Use Favorites tab**, agents can mark contacts as favorites, so that the most-called customers remain accessible while agents are working in Agent Desktop.
Storing Contacts

You can store up to 50 frequently called contacts in your personal Favorite Contacts list.

Click the star to add a contact to Favorites

To store a contact in your Favorites, follow these steps:

1. Select the desired contact from the Directory or Recent tab, or enter it manually in the Number Input Field. The contact will appear in the Contact Info Panel.

2. Hold your cursor over the contact's name in the list, and click the button that appears. The button will change its appearance.

3. If this is an existing contact from the Directory, it will be immediately added to your personal favorite contacts list. Note that you cannot change the names of directory contacts.

4. If this contact is not from the directory, you may add the contact as a new record by providing a name, photo, and email address (if any). Note that if you do not enter a display name for the contact, the name will be shown as "Anonymous" by default.

Adding and Updating Contacts

You can also add a contact to your favorites while having an active call or chat with this contact.

You can change information about your favorite contacts (unless they are Directory contacts) at any time. To change the information, select the contact and click Edit.
Calling Your Personal Favorites

To make calls to the contacts in your personal favorite contacts list, follow these steps:

1. Click the Favorites tab.
2. Select the contact you wish to call. The contact will appear in the Number Input Field.
3. If necessary, select the service as described in section How to Make an Outbound Call.
4. Click the Initiate call button.

Removing Favorites

To remove a contact from your favorites, select it in the Favorites tab and click the button in the Contact Info Panel.

How to Mute a Call

During a conversation, you can use the Mute button to disable your microphone temporarily. Muting prevents the other party on the call from hearing your voice and background noise.

To mute call, follow these steps:

1. Click the Mute button once to mute the call. The Mute button will change its appearance to and the same mute status icon will appear next to the call timer in the Active Communications List.
1. Click the Mute button again to unmute the call.

You can also use the Alt-X keyboard shortcut to mute/unmute the microphone.

How to Release a Call

At the end of the conversation, a call can be released by either yourself or by the other party on the call. If the other party terminates the call, you do not need to do anything in order to release this call on your side.

There are several ways to release the call from your side:

- Click the End call button.
- Click the X icon that appears when you mouse over this call in the Active Communications List.
- Use the Alt-Q keyboard shortcut to release the current call.
If after-call work is used for the service associated with the release call, the Contact Info Panel will show the status of this call as Wrap-up, and the User Status Indicator/Selector will indicate that you are in the After Call Work state. Otherwise, you will be immediately switched to Ready or Not Ready, depending on the system settings and/or the state you may have previously requested.

How to Wrap Up After Call Work

Depending on the type of service you provide and your contact center practices, after a service interaction (call or chat) has terminated, the system may automatically change your state to After Call Work (ACW). You can use the time in this state to finish any work associated with the service interaction that has just ended.

After finishing the after call work for the current customer interaction, you have the following options:

- Click the Complete button. This will finish processing the current interaction. If this was the only interaction at your desktop, you will be automatically switched to the next state, which may be Ready or Not Ready, depending on the system settings and/or the state you may have previously requested. However, if you have other active interactions at your desktop, you may remain in the After Call Work state and continue working on the other interactions. Thus, when you handle multiple interactions simultaneously, it is recommended that you use the Complete button to finish interaction processing in the After Call Work state.

- If you are ready to receive another service interaction, you can click the User Status Indicator/Selector and select Ready from the drop-down menu. You will be switched to the Ready state regardless of how many interactions you may have had at your desktop. Processing of all such interactions will be finished.

- If you wish to make yourself temporarily unavailable to receive new service interactions, click the User Status Indicator/Selector and select Not Ready (or a specific reason) from the drop-down menu. You will be switched to the Not Ready state regardless of how many interactions you may have had at your desktop. Processing of all such interactions will be finished.
You may be required to enter a disposition before finishing interaction processing. For more information, see How to Enter Dispositions and Notes.

Depending on the system settings, if you do not make yourself either Ready or Not Ready manually within the time allocated for after call work, the system may eventually switch you to the Ready or Not Ready state automatically.

Also, depending on your system settings, if there are other calls waiting in queue while you are in the After Call Work state, you may receive visual and audio notification of this fact.

**Note:** If you use a custom form in the Context Information Area for processing of data related to a specific call, the **Complete** button may appear on that form.

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**Dispositions and Notes**

Dispositions are custom interaction results defined by your contact center management. When handling a service interaction, you may be required to select one of the dispositions that define the outcome of the interaction. If dispositions are defined for the services that you provide, the Contact Info Panel of your Agent Desktop will display the Disposition Selector for every associated service interaction.

If you are required to set dispositions, you will receive detailed instructions for their use from your system administrator. Learn more about dispositions and how they are managed in the Contact Center Administrator Guide.

In addition to dispositions, you can also enter free-form text notes to provide more information about the outcome of the interaction.
How to Enter Dispositions and Notes

To enter a disposition for an interaction and/or related notes, follow these steps:

1. At any time during the interaction with the customer or while in the After Call Work state, click the Disposition selector.
2. From the drop-down menu, select the disposition that corresponds to the result of the interaction. Some dispositions specific to outbound campaigns may require additional parameters, such as scheduling of another call attempt. If such parameters are required, they will be displayed in the Contact Info Panel.
3. If necessary, enter free-form notes in the text field.
4. Continue to process the interaction normally. For more information about finishing interactions, see How to Release a Call and How to Wrap Up After-call Work.
Note: If you use a custom form in the *Context Information Area* for processing data related to a specific call, both the *Disposition Selector* and the *Notes* field may appear in that form instead of the *Contact Info Panel*.

**Other Uses for Dispositions**

If configured for your contact center, a disposition can be used to trigger a *workflow*, an automated series of events that are initiated when an interaction is completed.

Workflows automate what happens after the conversation is done and will handle any necessary follow-ups, depending on the interaction’s disposition type. Such follow-up actions include setting context variables, sending an email, sending a text message, scheduling an event, clearing a scheduled event, and making a request. Workflows help to reduce your workload by following up with customers and gathering data in a consistent way.

For example, setting a particular disposition for an interaction could trigger the following series of events to happen:

1. Send a survey to the customer
2. Wait a specified amount of time (e.g., 30 minutes, 1 day, 1 week, etc.)
3. Send a follow-up email to the customer.

**Using Dispositions to Request That Content Be Erased**

Starting with Bright Pattern Contact Center version 5.2, you can use a disposition to request that content from a specific interaction be erased. This capability was added to meet PCI DSS 3.2 and GDPR requirements, which specify that sensitive data (e.g., credit card information) may not be stored in your contact center, even if it is encrypted. As such, Bright Pattern allows for the manual deleting of data that is stored in voice recordings, voice recording transcripts, chat transcripts, email messages, screen recordings, and so forth.

You can request that such data be erased, but only your system administrator can erase it.

**What to Do**

1. If such a disposition is enabled for your contact center, you can disposition an interaction with a request to erase content, provided that you give a reason. Note that the name of the disposition is determined by your contact center. If you do not know which disposition to select, contact your supervisor or system administrator.
Disposition "Erase content" selected

2. In the Notes field, provide the reason for the request and enter additional details about the interaction. Then complete the interaction.

Use Notes to provide a reason for erasing content

3. The disposition will initiate a workflow that sends your system administrator an internal message with the request. The unique identifier tells the administrator which interaction is affected, and he or she can review the interaction and the request.

Example message delivered to the system administrator
How to Hold and Retrieve a Call

You can place an active call temporarily on hold in order to do some work related to this call without releasing it.

There are two ways to do that:

- To place a call on hold, click the **Hold** button.
- Click the Hold icon in the *Active Communications List*.

The *Active Communications List* will continue to display the call on hold as an active call. The *Held* status of this call will be indicated by the hold icon. The Hold button will change its appearance to Retrieve.

There are two ways to retrieve the call from hold and continue the conversation:

- Click the **Retrieve** button.
- Click the **Hold** icon in the *Active Communications List*.

How to Make a Consultation Call

A consultation call is a call you make with respect to another active call on your desktop.

Follow these steps to make a consultation call:

1. Place your primary call on hold first. See **How to Hold and Retrieve a Call** for more information.
2. Make a call to the consultation party. See **How to Make an Internal Call** or **How to Make an Outbound Call** for more information.
3. The *Active Communications List* will display both calls, the primary call with the hold icon, and the consultation call with the outgoing call icon.
4. If the consultation party is an agent or a supervisor, you can send the content of the *Context Information Area* related to the primary call by clicking the **Send Screen** button.
5. After finishing the consultation, click the **End Call** button to release the consultation call. (You can instead transfer your primary call to, or conference it with, the consultation party. See **How to Transfer a Call** and **How to Host a Conference** for more information.)
6. Retrieve the active call. See **How to Hold and Retrieve a Call** for more information.
Primary and consultation call in the Active Communications List

**Note:** You can also alternate between the primary and consultation calls by retrieving them in turn. (Clicking the **Retrieve** button will automatically put the current active call on hold).

#### How to Transfer a Call

You can transfer your primary call to a consultation party.

To transfer a call, follow these steps:

1. Place your primary call on hold and make a consultation call to the desired third party. See [How to Make a Consultation Call](#) for more information.
2. After making sure that the consultation party is willing to accept the primary call, click the **Transfer** button.
   
   If you have two calls on hold, you will be asked to select the call that you wish to transfer.

**Note:** If you change your mind about transferring the primary call to the consultation party, then instead of using the **Transfer** button, click the **End Call** button to finish the consultation call. Then click the **Retrieve** button to retrieve the primary call from hold and continue the conversation.

Upon completion of a transfer, the primary call will be connected to the consultation party and you will be disconnected from the call. Both the consultation call and the primary call will disappear from your **Active Communications List** and your state will change from **Busy** to **Ready**.

#### How to Host a Conference

A conference is a portion of a call where three or more parties can talk to each other simultaneously. You become a conference host when you connect a third participant to your regular two-party call.
There are two ways to connect a third participant to your two-party call: via a consultation call or single-step conference.

**Connecting Via Consultation Call**

To connect a third party via a consultation call, follow these steps:

1. Place your original call on hold and make a consultation call to the desired third party. See [How to Make a Consultation Call](#) for more information.
2. After making sure that the consultation party is willing to participate in the conference, click the **Merge** button. (If you have two or more calls on hold, you will be asked to confirm whether you wish to conference all held calls with the consultation party.) Upon clicking the **Merge** button, all three parties will be able to talk to each other.

**Note:** If you change your mind about conferencing the primary call with the consultation party, then instead of using the **Merge** button, click the **End Call** button to finish the consultation call. Then click the **Retrieve** button to retrieve the primary call from hold and continue the conversation.

**Connecting Via Single-Step Conference**

To connect a third party via a single-step conference, follow these steps:

1. Without placing the original call on hold, enter the number of the desired third party in the 'Number Input Field' (or select it from [Directory](#), [Recent](#), or [Favorites](#)).
2. Click the drop-down icon next to the **Initiate call** button, and select the **Initiate single-step conference** button. The dialing will begin immediately. Both you and the other party currently on the call will be able to monitor the progress of the dial attempt and engage in a three-party conversation as soon as the third party answers.

**Note:** If you have a call on hold prior to using the **Initiate single-step conference** button, it will not be connected to the dial attempt. Instead, a regular two-way call will be initiated to the desired number, while the original call will remain on hold. This is done to prevent the accidental merging of unrelated calls.
You can connect more than one party to your conference following the aforementioned procedures. All conference participants will be displayed in the Contact Info Panel.

Note that any other internal party connected to your conference will be able to add more participants to this conference. However, regardless of the number of participants or who connected them, you will continue to be the host of the conference call because you were the one who set up the original three-way conference.

**Disconnecting**

As the conference host, you have the following exclusive privileges: you can disconnect any individual participant from your conference at any time, and you can end the conference call for all participants in one step.

To disconnect an individual participant, hover over the participant's name in the Contact Info Panel, and click the disconnect icon that will appear next to the participant's name.

To end the conference call for all participants in one step, click the **End conference** button

Other participants can leave your conference at any time. You can only leave your own conference when it has three participants. To leave your conference, click the **Leave** button. You will be disconnected while the two remaining parties will carry on with a regular two-way call.

**Note:** When you connect a third party via a single-step conference function, all of the discussed conference controls become available to you as soon as the dialing begins. Thus, for example, you can leave the call without waiting for the third-party to answer.

**How to Participate in a Conference**

A conference is a portion of a call where three or more parties can talk to each other simultaneously. The party that turns a regular two-way call into a three-way conference by connecting a third participant becomes the conference host. (For more information about being a conference host, see [How to Host a Conference Call](#)) The other two parties in such a three-way conference become regular conference participants.
As a conference participant, you can do any of the following:

- See all other conference participants in the Contact Info Panel and talk to all of them.
- Add new participants to the conference.
- Leave the conference at any time.

### Adding New Participants

To add a new participant to the conference, follow these steps:

1. Place your conference call on hold and make a consultation call to the desired new party. See [How to Make a Consultation Call](#) for more information.
2. After making sure that the consultation party can join the conference, click the Merge button.

### Leaving a Conference

To leave the conference, click the Leave button. You will be disconnected while the remaining parties will carry on with the conference call.

The conference host can disconnect you from the conference at any time. The conference host can also end the conference for all participants in one step. For more information about conference host's privileges, see [How to Host a Conference Call](#).

### How to Place a Call in a Service Queue

Sometimes you may have to transfer a service call to a queue. This may be necessary, for example, if the caller has mistakenly selected a wrong service option during the interactive voice response (IVR) phase of the call, and you need to redirect his call to the team that can better help with his service request. Transfers of calls to service queues are called blind or single-step transfers because they do not involve consultation calls.

#### Blind Transfer
To make a blind transfer, follow these steps:

1. Select the desired queue from the Directory or enter its number in the Number Input Field.
2. Click the Blind button.

Upon completion of a blind transfer, the call will be placed in the selected service queue and you will be disconnected from this call. The call will disappear from your Active Communications List, and your state will change from Busy to Ready.

Transfer to a service queue

**Note:** Blind transfers to specific agent’s extensions are also possible and can be used, for example, when the caller prefers to speak to a particular person and does not mind leaving a voicemail message if that person happens to be unavailable to take his call.

**How to Connect a Voice Application to Your Call**

Some types of contact center services may involve connecting an interactive voice response (IVR) application to your conversation with the customer. Such applications can be used, for example, to authenticate customers using their personal identification numbers or collect payment card information.

**Connecting Applications**

To connect an IVR application, follow these steps:

1. Place your original service call on hold.
2. Select the desired application from the Directory or enter its number in the Number Input Field.
3. Click the Call button.
4. Once the IVR application is connected, click the Merge button to set up a conference. You will see both the customer’s name/number and the name of the IVR application in the Contact Info Panel.

**Note:** Because the application will be connected to your service call in the conference mode, you will continue to be an active participant of this call. To let the IVR application and the customer communicate without any possible audio interference, consider muting your microphone for the duration of customer's interaction with the application.

**Disconnecting Applications**
Under normal circumstances, the IVR application will disconnect from the conference automatically after finishing its function (e.g., after playing all the required voice prompts and/or collecting all the necessary data). However, in case of any difficulties (e.g., the customer is confused about the prompts and needs more instruction), you can disconnect the IVR application at any time.

To disconnect the IVR application, mouse over its name in the Contact Info Panel, and click the red disconnect icon. You can now talk to the customer, provide the necessary instructions, and connect the IVR application again when the customer is ready.

For more information about conference controls, see How to Host a Conference Call.

**How to Use Prerecorded Messages**

Depending on your contact center practices and the services that you provide, you may be required to repeat the same information during each call (e.g., a standard company greeting or a policy advisory). Such standard messages can be prerecorded and then played back to the customer during a call.

Some prerecorded messages can be preconfigured by your system administrator with respect to various services provided by your contact center. In this case, when you handle a call associated with a specific service, messages preconfigured for this service will be made available for selection via Contact Info Panel.

**Creating Messages**

You can define your personal prerecorded messages and record them using your own voice.

To create a personal message, follow these steps:

1. Prepare the text of your message.
2. Put on your headset.
3. Click Settings. Note that if you have uploaded a user profile photo, your photo is used in place of the Settings icon.
4. Select Pre-recorded Messages.
5. In the dialog window that appears, click the “+” button.
6. In the window that appears, specify the message Title (e.g., My regular voicemail message.)
7. Click the Start recording button. You will hear a single ringing tone, which indicates the beginning of the recording. The button appearance will change to show the stop control.
8. Speak your message into the microphone. When you are finished, click the Stop recording button.
9. Check your recorded message by clicking the Play file button. If you are not satisfied with the way the message sounds, repeat step 6 and step 7 of this process.
10. Click Ok to confirm.
Creating a personal prerecorded message

**Standard Greetings**

You can designate one of your prerecorded messages as a standard greeting that will be played to customers automatically as soon as you answer their calls (e.g., *Welcome to ... My name is ... How can help you today?*). You should only use such an automatic greeting if you actually use the same way of greeting your customers on all service calls that you handle.

To create such a greeting, follow these steps:

1. When reviewing your message, select the **play automatically on all service calls** checkbox.
2. When you click **Ok** to confirm, the message will appear marked as **(default)** in the message list.

**Reviewing and Editing Messages**

You can review your messages, change their titles, and re-record the content whenever you like.

To review and/or edit an existing prerecorded message, follow these steps:

1. Navigate to **Settings > Pre-recorded Messages**
2. Select the message you wish to edit
3. Click the **edit** button.

**Note:** Instead of recording your personal messages via the Agent Desktop application, you can record them offline and store them as audio files. The process of configuring your greetings is the same, except instead of recording controls, you click the **Upload** button and select the desired audio file.

**Playing Messages During a Call**

If there are any prerecorded messages defined either at the service level or for your personal use, a message selector will appear in the **Contact Info Panel** when you have a connected call.
To play a message to the other party on the call, follow these steps:

1. Select the desired message from the drop-down menu. If you do not see the desired message in the drop-down menu, click **more...** A separate dialog window will appear listing all available messages in two groups: *Canned Prompts from Service* and *Personal Pre-recorded Messages*.

2. Click the **Play file** button. 

3. Playback of the selected message will begin. You will be able to hear the message being played. You can continue the conversation with the other party normally after the message playback ends.

4. If you wish to stop the message before the end of the playback, click the **Stop** button. You can continue the conversation with the other party normally after stopping the message.

### Using a Pre-recorded Message As a Voicemail

You can use the message playback function to leave a prerecorded message on the called party’s answering machine. In this case, you can disconnect yourself from the call immediately after activating the message playback.

To leave a prerecorded message on the other party’s answering machine, follow these steps:

1. Select the desired message as described, and wait for the invitation to leave a message.

2. Click the **Play file** button. Playback of the selected message will begin.

3. Click **End Call** at any time to disconnect yourself from the call.

Playback of the prerecorded message to the called party’s answering machine will continue until the message ends and the call will then be disconnected automatically.

### How to Record a Call
Depending on your permissions, you may be able to activate call recording. Your system administrator will provide instructions for when call recording may be necessary or advisable. You can start recording at any time during your phone call.

If you have permission to record calls, the Contact Info Panel will display the call recording button during an active call.

To start recording a call, click the call recording button. The recording will begin from that moment, and the button appearance will change to show the stop control.

Depending on your permissions, once the recording starts, you may not be able to stop it. In this case, the recording button will be disabled, and the entire conversation from the moment of recording activation will be recorded.

Note: Many services are configured to record some or all calls automatically from the moment you receive and/or make them. If a call is being recorded automatically, the call recording button will show the stop control from the moment the call is established.

How to Stop or Pause Call Recording

Depending on your permissions, you may be able to stop the recording of a call (e.g., per a customer request) or pause it temporarily (e.g., in order to prevent some sensitive data from being recorded). Your system administrator will provide instructions for when call recording may have to be stopped or paused. You can stop or pause recording at any time during your phone call.

If a call is being recorded, the call recording button will show the stop control.

To stop recording of the call, click the button. The recording will stop from that moment, and the button appearance will change to show the start control. To resume recording at any time, click the button.

Voice Signatures

Depending on the type of services that you provide to your customers, you may be required to collect their voice signature during your phone calls with them. Voice signature refers to use of customer's voice, by way of recording answers to a predefined set of questions, as a legal signature with respect to a policy or contract discussed on the call. This section contains general information about the voice signature collection process and the functions of the Agent Desktop application that may be involved in it. You should receive detailed instructions for collection of voice signatures in the context of various services that you provide from your system administrator.

A call involving voice signature collection normally consists of two stages. During the first stage, you discuss the details of the contract with the customer and make sure that the customer is willing and ready to sign it via voice. Once the customer confirms consent and readiness, the second stage begins where the customer answers a set of standard questions, while you make sure that the answers are acceptable. If you are satisfied with the answers, you flag the call as one containing the customer's voice signature. This voice signature flag will be stored in the call details and can be used later to extract, store, and quickly find the corresponding voice recording.
Note: Collection of voice signature during a call only makes sense if the call is being recorded. Thus, any service involving voice signature collection will be configured to record 100% of the calls. You do not need to activate recordings for calls associated with such services manually.

Methods of Voice Processing

The process of voice signature collection can be facilitated using one of these two methods:

Using a Set of Prerecorded Prompts Configured by Your System Administrator for the Corresponding Service

If this method is used, a menu of such prompts will appear in the Contact Info Panel when you either make or receive a call associated with the given service. The order in which the messages must be played will be determined by your system administrator.

When you are ready to begin the process of voice signature collection:

- Select the first message from the menu.
- Activate the playback.
- Wait for the customer response.
- Repeat for all prompts that are part of the voice signature collection process.

For more information, see section How to Use Pre-recorded Messages.

Connecting a Voice Application to Your Call

In this case, your system administrator will provide the name and directory location of the application that should be connected when you are ready to begin the process of voice signature collection for the given service. Once you have connected the application, it will play all the necessary prompts to the customer, pausing after each prompt for a few seconds to give him an opportunity to respond. For more information, see section How to Connect a Voice Application to Your Call.

Once the voice signature collection is over and you are satisfied with all customer responses, select the voice signature checkbox to indicate that the recording of this call contains a voice signature. This checkbox may be located either in the Contact Info Panel or on the custom form that you see in the Context Information Area.
How to Schedule a Follow-up Activity

While talking to a customer or colleague, you can schedule follow-up activities related to your present call. For example, you can schedule an outbound call or email to confirm fulfillment of a customer’s request.

To schedule a follow-up activity in the context of your current interaction, follow these steps:

1. In the Contact Info Panel, click the Schedule follow-up activity button. The dialog window and calendar that appear will have the available contact information (e.g., name and phone number) pre-filled for you.
2. Add missing contact information (e.g., email address) if necessary.
3. Enter the activity Title and Notes.
4. Specify the activity Start and End time, and set the Reminder.
5. Click Save.

Scheduled activities will appear in your personal calendar, and you will get reminders when those activities are due. For general information about the calendar and reminders, see section How to Open the Calendar.

Follow-up activity details

How to Send SMS Messages
Depending on the service configuration and your personal permissions, you may be able to send text messages via the Short Message Service (SMS) to customers who use mobile phones. This capability can be useful when you need to give your customers information that is better communicated as text (e.g., a confirmation number, mailing address, or web link).

Text messages can be sent at any time: when you are on the phone with the mobile customer, while performing the related after-call work, and after you have finished processing of the call. If the customer replies to your text, the system will deliver this message to you, associate with your original message, and present it to you in the form of a chat session.

### Texting While in *Busy* or *After Call Work* State

To send an SMS message to a customer while handling the customer’s service call (i.e., while you are in the *Busy* or *After Call Work* state), follow these steps:

1. Make sure the service associated with this call supports SMS communications; if this is the case, the Send SMS icon will be displayed next to the customer's number in the Contact Info Panel.
2. If necessary, confirm with the customer that the customer’s phone can receive SMS messages.
3. Click the Send SMS icon.
4. Type the desired message in the Text Input Field.
5. You can use the Pre-defined text message icon to enter a message from your predefined text message set. For more information about predefined messages, see section How to Create and Edit Chat Responses. Note that there is a limit for the number of characters in one SMS message. The limit (160 characters) and the current number of characters already entered are displayed below the text input field.
6. When the message is ready, press Enter or click Send SMS icon below. The message will be sent to the customer and will appear with a timestamp in the transcript area above the Text Input Field. When the system confirms message transmission with the carrier, the status of the message will be displayed as Delivered.
If the customer replies to your message, the customer’s message will appear in the transcript area highlighted in a different color.

You can continue exchanging SMS messages in this manner for as long as necessary. All such messages will be presented to you via transcript as part of the same conversation. Note that such exchange can extend beyond the call and even beyond your current login session.

When you know that the message exchange is over, click the End Chat button. If the customer continues to send SMS messages to you after you end the session, those messages will be ignored.

**Texting While in Ready or Not Ready State**

To send an SMS message to a customer while in Ready or Not Ready state follow these steps:

1. Select the service associated with this SMS message. See section How to Make an Outbound Call for more information about selecting services.
2. If the selected service is configured to support SMS messages, the Send SMS button will be displayed next to the Number Input Field, adjacent to the Call button.
3. In the Number Input Field, enter the customer’s phone number. Make sure this is a mobile number.
4. Click the Send SMS button. The Contact Info Panel will display an active chat session with the entered number and the Text Input Field at the bottom.
5. Follow steps 3 to 6 of the process of sending an SMS message to a customer while handling his service call (see section "Texting While in Busy or After Call Work State").

**Note:** Depending on you contact center configuration, your customers may also be able to initiate a contact with you via SMS. For you, as an agent, such SMS messages will be presented in the same way as if they were regular incoming service chat requests. For more information, see section Handling Service Chats.

**How to Accept a Chat Request**

When logged in to the Agent Desktop application and in the Ready state, you are available to receive interactions such as chats at any time. Accepting a chat request is simple.

When a service chat interaction is delivered to your desktop, you will hear a tone and see an alert pop-up window titled Web Chat indicating a chat request. Your state will change from Ready to Busy. The alert pop-up window will display the name of the service requested by the customer as well as the customer’s name if it was provided in the chat request form.
To accept the chat request, follow these steps:

1. Click the **Accept** button.
2. The *Active Communications List* will display the chat icon 📮, which indicates that the chat session is now established and the timer for this session will start.
3. The available customer information will be displayed in the *Contact Info Panel*.
4. You can now [begin a chat session](#) with the customer.
If you do not accept a chat request within a predefined amount of time, you will be automatically switched to the Not Ready state. You will need to **make yourself manually Ready** when you are ready to receive another chat.

**Note:** Unaccepted chat requests will appear in your performance and activity reports.

## How to Reject a Chat Request

Typically, you will indicate your temporary unavailability to receive service chat interactions by **changing your status to Not Ready** while handling a previous interaction. However, if a chat request was delivered to your desktop before you had a chance to make yourself Not Ready, you have an option to reject this request.

To reject a chat request, click the **Reject** button in the chat alert pop-up window.

If you have no other chat sessions in progress, then after rejecting a new chat request, you will be automatically switched to the Not Ready state. If you have other chat sessions in progress, then after rejecting a new chat request, you will remain in the Busy state, and you will be automatically switched to the Not Ready state after finishing those chats. In either case, you will need to **make yourself manually Ready** when you are ready to receive new chat requests.

**Note:** Rejected chat requests will appear in your performance and activity reports.

## Chat Messages

Chat messages may be initiated by either the customer or the agent. If the customer entered chat text at the time of the chat request, the customer's chat text (i.e., message) will be displayed in the Control Info Panel above the Text Input Field of the Agent Desktop application.
Chat Session Timer

Your chat session is displayed in the Active Communications List. Beside the customer's name, a timer shows the time elapsed since the beginning of the chat session.

Sending and Receiving Chat Messages

To send a chat message to the customer, simply follow these steps:

1. Type the desired text in the Text Input Field.
2. Click the Send message icon.

All chat messages entered by yourself and by the customer will appear in chronological order in the Chat Dialog Window above the Chat Input Window. Note that depending on your contact center configuration, you may hear a tone each time you get a new message from the customer.

If the customer has initiated the chat from a website, you will also be able to see the name of the page that the customer had open when the chat was requested. This information will be updated when the customer navigates to other pages of the website.

Using Canned Chat Responses
For standard situations, such as greetings or ending the conversation, instead of typing the message from scratch, you may be able to select it from a list of canned (predefined) chat responses. You can create such responses yourself. For more information, see How to Create and Edit Chat Responses. Canned responses may also be prepared and made available to you by your system administrator. Variables, which may appear in some canned messages as letters preceded by the “%” sign, have the following meanings:

- %F – customer’s first name
- %L – customer’s last name

To select a canned chat response, click the Select pre-defined message icon and select the desired message. The selected message will appear in the Text Input Field. Note that you can modify this message before sending it. Click Send message.

If your contact center uses a knowledge base for customer service, you may be able to use information from that knowledge base in your chat messages.

### Sending Web Links

In web chats, you may copy and paste URLs into the text input field and have them appear as clickable underlined links. Note that the full URL must be copied and pasted into the chat in order for it to appear as a link; the URL must begin with either http:// or http://www. or www. to appear as a link. It is best practice to copy and paste the entire URL from your browser.

Links to pages within the same domain as the active web chat will open in the same browser window, whereas links pointing to other domains will open in a separate browser window.

### Customer Chat Inactivity

When a chat conversation is idle, both the agent and the customer will be notified of the inactivity, and the customer will be prompted to respond in order to continue the conversation. As with any message sent to or from the customer, the inactivity alert will be displayed as part of the conversation in the chat window. This functionality is helpful to the agent, who may be handling multiple chats or calls at the same time. Inactivity alerts give the agent the opportunity to prompt the customer to respond, or provide further avenues of assistance.
An example of the inactivity alert visible to the agent using the Agent Desktop application is shown.

The customer receives the same message and is prompted to respond.

If the conversation is idle for the length of time set in your chat service properties, the chat will be terminated. Both the agent and the customer will receive a message that indicates the conversation is closed: *Chat session ended.*

### How to Schedule a Follow-Up Activity from a Chat Session

Included in service chats is the option to schedule follow-up activities from active chat sessions; doing so sets reminders for you to check in with customers or complete activities at a later time.

To schedule a follow-up activity from an active chat session, click the *Schedule a follow-up activity* button. Clicking on this button will bring up your calendar in the context information area.

A panel on the right will display event properties to edit, similar to those outlined in [How to Schedule an Event](#). If your customer's contact information is saved in the Contacts section, their information will prepopulate the panel.
How to Create a Case from a Chat Session

Included in service chats is the option to create cases from active chat sessions. Creating cases from active chats creates records of service chats with the ability to follow up with customers via email at a later time. As well as adding notes to the cases, once saved, you ability to search for these cases in your Contacts section. For more information on this topic, see Cases.

To create a case from an active chat session, click the create case button. Clicking on this button will open a new case in context information area. When you create a new case, it will be assigned a number automatically; you may also name the case and enter notes in the notes field. When you are finished, click the save button.
Cases may be created during active chat sessions

To search for a case in your Contacts, type the number or name of the case in the search bar. If you have not sent an email from the case, it will be listed as *Active*; cases where a follow-up email was sent will be listed as *Closed*.
Opening a case allows you to email the customer

How to Flag a Chat Session

Included in service chats is the ability for you to flag an active chat session. Flagging a chat is a way to get help with tough questions or difficult situations. When you flag an active chat, supervisors monitoring your team will see your flag. Supervisors have the ability to monitor, coach, or barge-in on your chat session, which includes the ability to speak with your customer directly.

To flag an active chat session, click the flag button. Once flagged, your supervisors may choose to take any number of actions including, sending you a personal chat message, speaking with you directly (coaching), or participating in the conversation (barge-in).
How to Send and Receive Pictures and Documents

You can send files to your customers as well as receive files from customers via chat.

To send a file, follow these steps:

1. Click the Add attachment button.
2. Select the desired file.
3. Click Open.
4. Alternatively, you can drag and drop the file directly to your Chat Panel.

To the customer, the transmitted file will normally appear as a link for a document (or a thumb for a picture). The customer can click the link/thumb to download the file and open it as any regular file on his computer.

The attached document and picture may appear to the customer as shown.
Your customers can send you files using either the drag-and-drop method or the **Add attachment** button.

If the customer sends you a document, your *Chat Panel* will show the file name as a link. Click the link to download the document and open it as any regular file on your computer.

If the customer sends you a picture, it will be displayed as part of your message exchange in the *Chat Panel*.

If you click the picture, it will appear in a large pop-out window.
How to Have an Audio Chat

During an active chat session, both you and your customers have the ability to initiate VoIP calls (i.e., audio only), allowing you to easily switch between chat and voice. Note: In order to have audio-only calls via chat, this setting must be enabled by your contact center administrator.

To initiate an audio chat with your customer, follow these steps:

1. Click the headset icon, located in your Active Communications List (ACL).
2. If your customer wants to initiate an audio chat, they may click the headset icon. Note: The background color of the button your customers see will vary depending on how your chat widget is configured.
3. To end an audio chat, click on the telephone icon.

Switching from Audio-Only to Video Chat

If both VoIP and video chat are enabled, you may switch between, chat, audio, and video during an active chat session. Note: Video chat must always start as an audio-only chat, with the option to upgrade to video.

To initiate a video chat, follow these steps:
1. Click the **headset icon**
2. Next, click on the **video on** button
3. If your customer wants to initiate a video chat, they must first click the **headset icon**, then the **video on** button.

For more information on how video chat works, see [How to Have a Video Chat](#)

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**How to Have a Video Chat**

During an active chat session, both you and your customers have the ability to initiate video chat, allowing you to easily switch between chat and video.

**Note:** Video chat must always start as an audio chat, with the option to upgrade to video. Additionally, in order to have video calls via chat, both this and the VoIP call settings must be enabled by your contact center administrator.

To initiate a video chat with your customer, follow these steps:

1. First, you must first initiate an audio chat. To initiate an audio chat, click the **headset icon**.
2. Next, click the **video on** button. When your video is being sent, a small video of you is shown in the bottom right corner of the video area. If there is no video from the visitor, and you are still sending video, the main video screen will be black.
3. If your customer wants to initiate a video chat, they must first click the **headset icon**, then the **video on** button. **Note:** The background color of the button your customers see will vary depending on how your chat widget is configured.
4. To end both video and audio chats, click on the **telephone icon**.
When you have a video chat with a customer, your camera view is in the bottom right-hand corner of the screen area.

**Switching from Video to Audio-Only Chat**

Because both video and VoIP settings must be enabled for video chat to work, either you or your customer may turn off your camera but continue having an audio-only chat.

To switch from video to audio, turn off your camera by clicking the video off button. If your customer wants to turn off their camera, they may click their video off button. If there is no video from the visitor, and you are still sending video, the main video screen will be black.

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**How to Transfer Your Chat Session**

For any number of reasons, you may wish to transfer a chat interaction to another agent or supervisor, or you may wish to conference the chat (i.e., invite another agent or supervisor to join the chat) for a group conversation.

**Transferring and Conferencing with Another Agent**

You can connect another agent to your chat session for a consultation and/or completely transfer the session to that agent for handling. Before connecting another agent, consider contacting this agent via internal chat or internal call to check the agent's availability to participate in your conference and/or accept the transferred session.

To set up a chat conference, follow these steps:

1. In the chat session pane, click the add icon.
2. In the Invite window that appears, select the agent you wish to connect to your chat.
3. Click Ok. The agent will be added to the chat and will be able communicate with both you and the customer.
Invite other agents to join a chat

To transfer the chat session completely to another agent, follow these steps:

1. Set up a chat conference as explained in the previous set of steps.
2. Upon confirmation that the new agent is connected to the chat, click the **End Chat** button in the **Contact Info Panel** to leave the chat session.
3. The other agent will continue the chat conversation with the customer.

**Transferring to a Service Queue**

You can transfer your chat session to a service queue in a similar way.

To transfer your chat to a queue, follow these steps:

1. In the chat session pane, click the add icon.
2. In the window that appears, select the desired service queue and click **Ok**. At this point, you will still be connected to the chat session and, depending on the queue configuration, you may see an automated message sent from that queue to the customer.
3. Click the **End Chat** button in the **Contact Info Panel** to leave the chat session. The session will remain in the service queue to be connected to another agent.

**How to Create and Edit Canned Chat Responses**
Canned chat responses are greetings that you send as standard to your customers. Creating canned chat responses can save agents time in that agents will not have to type in standard responses for every new chat (i.e., Hi, my name is .... How may I help you?). Such responses are guarantee that agents reply to customers in a standard way.

You can create your own canned chat responses as well as edit existing responses provided by your team or your contact center administrator.

To create new responses, follow these steps:

1. Click the Settings icon in the upper right corner of the desktop. Note that if you have uploaded a photo to your user profile, your photo will be shown instead of the Settings icon.
2. Select the Chat Responses option. A list of the previously defined responses will appear.
3. To define a new chat response, click the add option.
4. Type the desired text in the editable field and click the OK to confirm.

A new canned response

To edit an existing chat response, follow these steps:

1. Navigate to Settings > Chat Responses
2. Select the item to edit. The text of the response will appear in an editable field.
3. Select the for all agents checkbox if you wish to make this chat response available globally.
4. Select the checkbox for the desired team(s) if you wish to make this chat response available to selected team(s).
5. Make the desired changes and click OK to confirm. Note that you can also delete a response while in the Edit window.
To arrange your canned responses in folders, follow these steps:

1. Click add folder.
2. Enter a folder name.
3. Click OK. The new folder will appear in the list.
4. To open the folder, click its name.

Note that depending on your permissions, you may be able to make the chat responses that you create available to all agents in your contact center. If you have such permissions, you will see the for all agents checkbox in the Edit window.

The following variables can be used in canned chat responses:

- %AF – for agent's first name
- %AL – for agent's last name
- %F – for customer's first name
- %L – for customer's last name

Appending Canned Chat Responses

Once one or more canned chat responses (i.e., greetings) have been created and saved, agents or users working in the Agent Desktop application have the option of editing a canned response from within the chat window before it is sent. This capability allows agents to change a standard response to suit the customer's message or question, before the response is delivered to the customer.

For example, if your saved canned chat response is, Hello, how may I help you?, and your customer's message explicitly states what the customer needs (e.g., How do I change my login ID?), you should append your canned chat response to something more appropriate, such as, Thank you for your question. I can help you with that. Appending canned responses makes it easy to create a more relevant, personalized chat experience for your customers.

**Step 1: Begin a chat.**

Canned chat responses are edited from within the Text Input Field in the Agent Desktop application. When your chat interaction is in session, you can type in the chat box or insert a canned chat response (i.e., a greeting or message).

**Step 2: Select a canned chat response.**
To select a canned chat response, click the Select predefined message icon.
Select the desired greeting.
The selected greeting will appear in the Text Input Field. Note that you can modify this message before sending it--this is called editing and appending a canned chat response.
Click Send message or hit Enter.

If you have not already created any greetings, no greetings/canned chat responses will be displayed. You must create them before they can be edited in the chat window.

Selecting a predefined message in the chat window

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Step 3: Edit the canned chat response and append it to the chat.

- When you select the desired greeting, the greeting text will appear in the chat box.
- You can edit your canned chat response from within the Active Communications List window.
- Hit Enter to send the message to the customer.

The appended message is delivered to the customer.

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How to End a Chat Session

A chat session may be terminated either by yourself or by the customer. If the customer terminates the session, you do not need to do anything in order to end this session on your side.

If you choose to terminate the chat session first, click the End Chat button that appears in the Contact Info Panel or at the top of the Agent Desktop upon mousing over the customer's name.
Depending on your contact center practices and the type of service, your state will either change to Ready or you may be given time to wrap-up the work related to the chat session that has just ended. In this case, your state will change to After Call Work. For more information, see section How to Wrap up After Call Work.

**Blacklisting Chat Clients**

Starting with version 3.14 of Bright Pattern Contact Center software, agents handling chat interactions can “blacklist” a chat client (i.e., customer) by typing a command directly in the chat dialog window. For example, if a customer is sending inappropriate material to the agent, is misbehaving, or is clearly sending spam material, the agent can instantly end the chat session and prevent the customer from initiating future chats.

This functionality works for every type of chat (web chat, SMS text, mobile app messaging, and so forth) and is carried out by the agent working within the Agent Desktop application.

**How to Ban a Chat Client**

To end a chat and ban a customer from chatting again, the agent simply types /ban in the text entry field of the chat dialog window. The command instantly ends the chat, and the agent is placed in the After Call Work (ACW) state. The customer can no longer initiate chats, texts, other other such messages.

When an agent uses the /ban function, it affects the customer's web browser, not a website. That is, a blacklist cookie is added to the browser and the session is ended so the customer can no longer chat with agents unless the cookies are cleared.

The chat is completed and the customer is blacklisted
How to Send a Secure Form

Agent Desktop enables you to provide secure in-chat data forms to customers for interaction handling during chats. With this capability, you can prompt customers to complete chat forms with their personal data (e.g., social security numbers, credit card data, addresses, etc.), and you can receive them securely without their sensitive data being saved in chat transcripts.

For example, you might request that the customer fill out a Credit Card form, provide driver's license information on a Secure Note form, or enter social security numbers on an SSN Form.

With an emphasis on security, data is encrypted in transit from the customer to you. Just as importantly, that data is not saved in chat transcripts. Customers can rest easy knowing their information is 1) safe, and 2) correct, as any data errors are introduced by the customer rather than the agent. Credit card numbers entered on the credit card form, for example, are validated and their card type is detected automatically. If the card number is entered incorrectly or if the card type cannot be detected, the “Unknown” message indicates an input mistake to the customer, which saves agent the time needed to convey the error back to customer.

During active chats, chat forms do not block the chat interaction, as both the customer and agent can continue chatting without interruption. Customers see the form at the bottom of the active chat stream until it is filled or canceled by the customer.

Requesting a Form

You can send a secure in-chat form by requesting it. In the text input field of your Agent Desktop chat window, simply type the command /form.

Typing "/form" in the text input field will request a chat form

Any chat forms that are available for the service will be displayed, and you can select which one you wish to use. Once you select the form to use, the message "Secure data has been requested" will be shown in the chat.
Select the form you wish to use

In addition to typing the form command, you may request a form using canned responses or by searching Knowledge Base.

Handling Multiple Chat Sessions

Depending on your personal qualifications and your contact center practices, you may be expected to handle multiple chat sessions simultaneously.

When you have a few active chat sessions, only one of them will be in focus at any given moment. The in-focus session is the one that is currently displayed in the Contact Info Panel. It is also highlighted in the Active Communications List. All chat-related controls take effect for the in-focus session only. If you receive a chat message from a customer whose session is currently out of focus, the chat icon of this session in the Active Communications List will start blinking. You can place this session in focus by selecting it in the list. You can switch between your various sessions in this manner at any time.
Multiple chat sessions

Arrival of a new chat request will always be indicated by the chat alert pop-up window regardless of how many chat sessions you may already have in progress at your Agent Desktop. See section How to Accept a Chat Request for more information. When you accept such a request, this new chat session will be automatically placed in focus to enable you to provide an immediate response to the new customer.

Note that you will remain in the Busy state for as long as you have at least one active chat session on your desktop.

Co-browsing

During a web chat, co-browsing functionality allows you to view the customer’s screen and follow the customer’s scrolling movements. Co-browsing is initiated during the chat by the customer—not the agent—and screen sharing ends when either the customer clicks Co-browsing button or when the chat is terminated.

Co-browsing is configured for your contact center by your system administrator.

How Co-browsing Works

During active chats, the chat window will display the Co-browsing button to customers. When the customer clicks the Co-browsing button, a request is sent to you, the agent, in the chat message.
Co-browsing during live chat

When you click/accept the co-browsing request, the customer's screen appears on your screen. You can follow the customer's scrolling movements and view the customer's screen only. A hand icon, along with the label “Viewer”, is displayed on the customer's screen to indicate that an agent is currently viewing the screen in Co-browsing mode. Similarly, you will see a circle icon that indicates you are viewing the customer's screen.

The hand icon indicates an agent is viewing the customer's screen

Co-browsing is turned off when the customer clicks the Co-browsing button again on the active chat window.
General Information About Mobile Interactions

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.

Mobile chat application example

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.
Mobile Chat

The General Information About Mobile Interactions section shows how a typical chat conversation may be presented to a mobile customer. For you, as an agent, the same conversation will appear as if it were a regular service chat. Note that SMS messages may contain more than 160 characters. For detailed information about chat handling, see section Handling Service Chats.

Mobile chat with customer location information

A number of capabilities and advantages that may be specific to mobile chats are discussed in this section. Note that all these functions are optional and depend on the capabilities of the mobile application, which in turn depends on the purpose and configuration of the contact center services for which this application is designed. Your system administrator will advise you on the exact set of additional functions that may be available to you when you handle chat sessions with your mobile customers.

End a Chat and Continue the Conversation as a Call

Mobile customers access your contact center via smartphones (i.e., devices that will typically have an integrated phone capability). Thus, when you accept a mobile chat request, you may see a customer’s phone number in the Contact Info Panel. This enables you to call the customer at any time during the chat session (e.g., upon the customer’s request or if you feel that a voice call may be a more efficient way to provide the requested service. In the latter case, you should use the chat exchange to get the customer’s consent to be contacted by phone.)

To make a call, click the customer’s phone number. Once the customer answers, you can handle the established call as any regular voice call. Your chat session will continue in parallel with the call. For more information on phone calls, see section Handling Calls.
Screen Pop Information

The Context Information Area of your Agent Desktop may be used by the mobile application to provide some additional information to you, which may be helpful in providing the requested service. In the example above, the customer’s auto insurance application immediately transmits the GPS coordinates of the caller, enabling the agent to view the exact location of the accident on the map.

Send and Receive Files

Mobile customers may be able to send you images related to their service requests. In the example above, the agent may ask the customer to send him a picture of the accident. Once the picture is sent, it will appear in your Chat Panel, as shown.

Mobile chat with a picture sent by the customer

Mobile Voice
As mentioned in the Mobile Chat section, you may be able to make calls to mobile customers with whom you already have active chat sessions. Your chat session will continue in parallel with the call forming a multimedia interaction consisting of a voice and a chat components.

**Note:** Depending on your service configuration, the system may start dialing your mobile customers automatically as soon as you accept their chat requests. This usually indicates that the customers use their mobile applications to request voice contact as opposed to chat. Your system administrator will advise you whether you should expect any such automatic calls or you would only call your customers manually. In either case, once the mobile voice contact is made, its further handling will be no different from handling of any regular voice call. See section Handling Calls for details.

The chat component is the primary component of such interactions, which means the following:

- As long as you have an active chat session with your mobile customer, you can make repeated calls to this customer as necessary.
- All such calls will be associated with the service identified for the original chat interaction.
- In order to finish a multimedia interaction, you will have to release the call first and then disconnect the chat.

**Mobile Video**

The Agent Desktop application supports video calling. Thus, depending on the capabilities of your computer and the customer's mobile application, voice calls may be supplemented with a video channel.

If the customer requests a video call, you will receive a browser notification asking you to confirm the video session.

To enable the video session, click **Allow**.

The *Chat Panel* will open video windows showing your web camera and the web camera of your customer's mobile phone.

Note that once the video session begins, only the customer can close the video channel while keeping the other channels (i.e., chat and/or voice) enabled. You can only close the entire communication session at once.

**General Information About Outbound Campaigns**
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](#).

**How to Review a Calling Record**

Calling records, also known as campaign records, include detailed information about a call interaction. This information includes customer name, phone number(s), customer history, previous attempts to contact the customer, and so forth. Campaign records are accessible to agents on the Agent Desktop application. You can access calling records in the following way.
Step 1: Preview campaign records.

- When a campaign record is delivered to your desktop, you will see a pop-up window titled Preview, which indicates a preview request. A preview allows you to review campaign records before attempting to contact a customer. The pop-up window will display the campaign name and the customer name.
- Click Accept to review the record. (Note that depending on your contact center practices, calling records delivered to your desktop may be automatically accepted for you.)
- Notice that your state will change from Ready to Busy.

Step 2: Review available information.

- View the customer name and phone numbers from the preview record in the Contact Info Panel.
- Click the History tab to see if there have been any previous attempts to contact this customer within the given campaign.
- Notice that you will continue to be in the Busy state while reviewing the record. You can make yourself Not Ready at any time during the review of the given record if you want to make yourself unavailable for any subsequent review requests.

Step 3: Either complete the record or call the customer.

After reviewing the record, you can take one of the following approaches.

If the record appears to have some incorrect or missing information:

- Select the disposition corresponding to this situation.
- Click the Complete button to finish processing of this record within the campaign. (The default disposition is called Bad Record, but it may be redefined in you contact center. If in doubt, consult your system administrator.)
- Your state will change from Busy to Ready, and you are likely to receive another preview request shortly.

If the information in the record appears to be valid, but you cannot handle it for any reason:

- Click the Skip button. The system will remove the record from your desktop, and will attempt to distribute it later.
- Unless you make yourself Not Ready before clicking Skip, your state will change from Busy to Ready, and you are likely to receive another preview request soon. * Note that each instance of skipping a record will be accounted for in the contact center reports.

If the information in the record appears to be valid and you are ready to call this customer:

- Click the phone number in the Addresses area.
- If there are multiple numbers, the number recommended for dialing at this time according to the campaign configuration will be marked with a green circle. (Note that depending on your contact center practices, you may be given a certain amount of time to review the record before the system will dial its preferred number automatically.)
- A call attempt to the selected number will be initiated, and the subsequent call handling will be no different from any regular outbound call, except that you would normally be required to set a call disposition according to the call result. For more information, see sections How to Enter Dispositions and Notes and How to Reschedule a Call Attempt.
How to Reject a Calling Record

Typically, you will indicate your temporary unavailability to receive records for review by changing your status to Not Ready while handling a previous interaction. However, if a calling record was delivered to your desktop before you had a chance to make yourself Not Ready, you have an option to reject this record.

To reject a record, click the Reject button in the preview pop-up window. The system will cancel the request and will attempt to distribute this record later.

Calling record preview pop-up window

After rejecting a record, you will be automatically switched to the Not Ready state. You will need to make yourself manually Ready when you are ready to receive another call.

Note: Rejected calling records will appear in your performance and activity reports.

How to Reschedule a Call Attempt

While participating in an outbound campaign, you normally will be expected to select a disposition indicating the result of every call that you handle. For more information, see section How to Enter Dispositions and Notes.

Depending on the selected disposition, you may also be expected to schedule another attempt to reach the same customer. Rescheduling is typical for situations when, for example, the customer requests that you call again at a more convenient time. You will receive detailed instructions about rescheduling of calls in various situations from your campaign administrator. If the disposition that you select implies scheduling of another call attempt, the Next call controls will be displayed in the Contact Info Panel below the Disposition Selector.
To schedule another call attempt, follow these steps:

1. Select the date and the time interval during which the attempt shall be made.
2. Depending on the customer’s preferences, you may also have to select another time zone for the time interval that you have entered.
3. Enter the phone number with which the customer wishes to be called.

Once you have entered the rescheduling information, the call usually can be finished. For more information about terminating calls, see How to Release a Call and How to Wrap Up After-call Work.

How to Open the Calendar

Your Agent Desktop is equipped with a calendar where you can schedule various tasks and events related to your work, such as follow-up calls with customers. You can configure your calendar to provide reminders for such scheduled events.

To open the calendar, click the Calendar icon in the main menu on the left-hand side of the screen. The calendar view will open in the Context Information Area. You can use the standard controls above the calendar grid to switch between the day, week, and month views, to move to other dates in the past (<) or in the future (>), and to return to the view containing the current date (today). The current date is highlighted with a light yellow background.
Calendar Views

The calendar can be displayed in three different views: month, week, and day.

In each view, you can see, add, and change scheduled events for yourself or others by clicking anywhere on the calendar or on specific events or time slots. The current date is highlighted with a light yellow background. Clicking on an event shows its preview form to the right of the calendar.
How to Schedule an Event

You can use the calendar to schedule events.

**Step 1: Designate the date and time**

Click anywhere on the calendar or select the desired time slot. A panel on the right will display event properties to edit.
Step 2: Name the event

Enter a title for your event. The title will be displayed on the calendar.

Event title

Step 3: Confirm the event details

The time of the event will correspond to the position and duration of the time slot selected in the calendar grid. You can adjust this time manually in the Date and Time fields. Then adjust the Timezone if necessary.

Adjust date, time, and timezone

Step 4: Set a reminder
Specify how far in advance you would like to be reminded about the event. You can tell the calendar when to pop a reminder to you, in terms of the number of minutes, hours, and days in advance of the event.

**Step 5: Describe the event**

In the *Summary* field, you can optionally add a descriptive summary of the event.

**Step 6: Assign contacts**

If your event is a scheduled call to a known contact, you can specify the contact’s name, phone number, and/or email address. To add or assign contacts to an event, click the + sign at the bottom of the event properties pane. You will have two options for looking up the contact.

There are two ways to add a contact

**Quick Contact Lookup**

Click *Search contacts* to find a contact in the *Lookup* window that pops up.
Contact Lookup

To use Lookup, type any text into the **search term** field. Lookup will search through the list of the most recent manual name-address inputs first (the list maintained throughout the system, not just in calendar), and then it will search in directory. It searches for the text that was entered, in both the name and address fields of your system's data. The matches are highlighted in the search results list in bold.

**Enter Contact Details Manually**

Click **Enter manually (or directory)** to type in a name on an empty contacts card. Clicking **create contact** will create a new contact record for this person.

Manual entry

When filling in an empty card, typing into the text field will display a drop-down list of 10 entries pulled from recent address entries (i.e., entries from manual input, contacts, or the directory maintained in the system, not just in the calendar). If fewer than 10 entries are found, the rest are pulled from the directory.

If there are multiple addresses for a person, each name-address pair is shown as a separate item
Step 7: Save your event (the most important step)

Click the Save button. The new event will appear in the calendar highlighted in a blue color.

You may also use the calendar to schedule follow-up activities in the context of your present customer interactions directly from the Contact Info Panel. For more information, see section How to Schedule a Follow-up Activity.

How to Edit Existing Events

You can use the following methods to edit existing events.

Edit Properties

To edit any event property, including its title, click the event on the calendar. Its current properties will be displayed in the panel on the right. Click Edit and be sure to save your changes when you are done.

Reschedule

To reschedule an existing event, click and drag it to the new desired time slot directly in the calendar grid.

How to reschedule an event

Change Duration

When using the calendar in Week or Day view, you can change the duration of an event by clicking and dragging the = symbol at the bottom of the event up or down. This action expands or reduces the amount of time that the event will take.
How to change event duration

**Mark As Completed**

To mark your event as completed, click the event and go to the event properties on the right-hand side of the screen. Then select the **completed** checkbox. When you are done with this event or assignment, click **Save**. Completed events will be shown on the calendar in a green color.

**Delete**

To delete an event, click the **Delete** button.
How to delete an event

Note that your supervisors can view and edit your personal calendars, reassign your scheduled tasks and events to other agents, and assign someone else's tasks to you.

Reminders

You will receive reminders about your scheduled events according to their configured reminder times. A reminder will appear as a pop-up window showing the title and start time of the event.

What you do with reminders is up to you.

- Click **Open** to review the event information. Note that the event will be automatically marked as completed.
- Click **Snooze** to be reminded about this event again in five minutes.
- Click **Dismiss** to close the reminder without any follow-up. Note that the event will be automatically marked as completed.
General Information About Handling My Cases (Email)

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.

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

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 Understanding Email Cases 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.
Understanding Email Cases and Threads

Every email interaction is associated with a case and can be part of a thread. The following is an explanation of these

Cases

A case is an instance of customer service that is created to track all communications related to a specific customer request. It is created when the request arrives, maintained as an active entity while the request is being worked on, and closed when the request is fulfilled.

When a new email request arrives, the system creates a case for it automatically and assigns a number to this case that is unique within your contact center (e.g., 14355). This number is typically communicated to the customer and can be used by both the customer and yourself to refer to the given request in all future communications. This number also helps you quickly find all past communications related to the case in the email history.

You can view cases by selecting My Cases on the Agent Desktop menu.

A case is closed when you assign a final disposition to an email associated with this case. A final disposition is a disposition that indicates that no further follow-up is expected or necessary for the given case (e.g., the customer has confirmed request fulfillment). Dispositions are fully customizable and can often be service-specific. Your system administrator will explain how to use dispositions and point out the ones that can be used to close cases.

Threads

A group of emails related to the same case is called an email thread. Threads are created when the system matches in-reply-to email headers. Additionally, when you reply to a customer’s request for the first time, the system will generate a unique thread identifier and attach it to the email subject. Unlike the case number, the email thread identifier may contain both numbers and letters (e.g., JXAGPDRNQ2SO) and is intended primarily for automatic processing.
For example, when a new email comes in, the system will analyze the subject to see if there is a matching email header. If a matching header is found and recognized, the system will automatically assign that email to the corresponding case. Depending on your service configuration, the system may also attempt to deliver that email to you if you have previously worked on this case.

When you reply to an email, a thread ID is added to the email subject

**How to Accept an Email**

When an email interaction is delivered to your desktop via the push method, you will see an alert pop-up window titled *Email / incoming*.

The alert pop-up window will display the following items:

- Name of the service requested by the customer
- Customer’s display name (if available)
- Customer’s email address
- Subject line content

To accept the email for immediate processing, click the **Reply** button. The *Active Communications List* will display the email icon indicating that you now have an active email on your desktop.

For subsequent email handling steps, see [How to Review an Incoming Email](#).

When you click **Reply**, the accepted email becomes your in-focus interaction (i.e., the interaction that you intend to handle right away). If you are busy with another task when an email arrives and do not want to shift your focus immediately to this new email, you can click **Postpone**. The new email will be placed in your *Active Communications List*, but it will be out of focus until you manually select it from that list for processing.
Note: If you do not accept an incoming email within a predefined amount of time by clicking either Reply or Postpone, the email will be returned to the service queue for distribution to another agent, and you will be automatically switched to the Not Ready state. You will need to make yourself manually Ready when you are ready to receive another email. Unaccepted emails will appear in your performance and activity reports.

How to Retrieve an Email from the Team Queue

If emails are distributed via the Pull method, they will appear in your team queue. You can immediately see if there are any emails in the queue by checking entry My Cases in your Active Communications List. The entry will show how many emails you currently have in Personal Queue and in Team Queue.

Viewing Team Queue Content

To view the content of the Team Queue, select the My Cases entry. Both Personal Queue and the Team Queue will be displayed in the Contact Info Panel area. Click on Team Queue to view all emails in the team queue.

For each queued email, customer's display name, arrival date/time, subject line, and attachment indicator (if there are attachments) will be shown. Depending on your system configuration, an abbreviated service name may also be displayed next to the arrival date/time. If such short names are used, you will receive their descriptions from your system administrator.

Email in team queue with customer name, service name, arrival time, and subject

To see the full sender's email address, hover over the customer's display name.

To see the full service name, hover over the abbreviated service name.

The attachment indicator shows whether there are any attachments in the messages sent or received in the entire email thread. The indicator is displayed for each message in the thread at the end of the line in the queue.
A bar indicator next to each email will indicate how close the current wait time is to breaching the service level agreement (SLA). The SLA is your contact center's "standard" time for replying to customers' emails. The unshaded portion of the SLA bar represents the time remaining to the SLA breach. This time also defines the default order in which emails appear in the queue. In the following example, the first email is close to breaching the SLA, the second one has about a half of the SLA threshold time remaining, and the third has just arrived.

SLA indicators

You can sort emails in the team queue by Create Time, Update Time, Last customer update, SLA Age %, From, Subject, and Flag. In addition, you may choose either ascending or descending order of email appearance in each case. This is done by clicking the up/down arrow icon.

Team queue with the service filter sorting controls

**Adjusting Team Queue View**

If your team is assigned to handling emails for multiple services, you can adjust your Team Queue view to display emails for any one of those services separately or for all assigned services at once. The name of the currently selected service will be displayed under the queue title. To view another service, click on the currently selected service name and select the desired service from the drop-down menu. To view queued emails for all assigned services, click All.

**Note:** The limited screen space allocated for the team queue on the screen only allows to see a few emails. You can use scrolling to see more emails.

**Preview Email Content Without Retrieving It**
You can preview content of an email in the Team Queue without retrieving it. To preview an email, click it once. For more information about reviewing email content, see section How to Review an Incoming Email.

Retrieving Email

To retrieve an email for handling, double-click it. (Note that double-clicking the email moves the email to your Personal Queue. The Active Communications List will display the email icon, indicating that you now have an active email on your desktop. For subsequent email handling steps, see section How to Review an Incoming Email.

**Note:** If subsequent handling of a selected email involves replying or forwarding, you can also retrieve it for handling by selecting the corresponding action from the editing area. For more information, see sections How to Forward an Email and How to Compose a Reply.

Instead of retrieving an email for handling, you can move it to Personal Queue for processing at a later time. To move an email to Personal Queue, you can click the Grab button in the reading pane, drag the selected email from the team queue and drop it anywhere in Personal Queue, or double-click it.

You can use the drag-and-drop operation to move multiple emails to Personal Queue in one step. Click the desired emails while holding the Ctrl button. (If you select a range, you can click the first and last email in the range while holding the Shift button.) Drag selected emails and drop them anywhere in Personal Queue.

How to Retrieve an Email from Personal Queue

As mentioned in the How to Retrieve an Email from the Team Queue section, in addition to the Push and Pull distribution methods, an email can be assigned to you by a supervisor. Depending on your system configuration, if an incoming email is related to a case that you previously handled, such an email can also be delivered to you directly. These emails will appear in Personal Queue, from which you will be expected to retrieve them manually. Personal Queue looks very similar to the Team Queue described in the previous section. It is opened using the same control, displayed in the same area of your application, and provides the same information about each email.

For more information, see section How to Retrieve an Email for the Team Queue.

Personal Queue also contains emails that you may have worked on previously and saved as drafts. For more information, see section How to Save an Email as a Draft. Drafts are retrieved from Personal Queue for processing in the same way as new emails. Emails in Personal Queue are arranged by the service level agreement (SLA), with the ones closest to the SLA breach appearing on top of the list. Note that the limited space allocated for the personal queue on the desktop only allows you to see a few emails. You can scroll to see more emails.

The attachment indicator shows whether there are any attachments in the messages sent or received in the entire email thread. The indicator is displayed for each message in the thread at the end of the line in the queue.

To retrieve an email for handling, follow these steps:

1. Double-click the email or click the Grab button in the editing area.
2. The Active Communications List will display the email icon indicating that you now have an active email on
For subsequent email handling steps, see section **How to Review an Incoming Email**.

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**Overview of the Email Working Area**

When you have an active email interaction selected for processing in the *Active Communications List*, the entire *Context Information Area* of your Agent Desktop application will be dedicated to processing of that email. Your email working area is divided into three main parts: *Reading Pane*, *Reply Editor*, and *Notes Editor*.

- The *Reading Pane* displays the content of the current email that you need to process. The number of the case that this email is part of is displayed above. The *Reading Pane* can also show you the history of all previous communications related to this case.

- The *Reply Editor* is used to compose a reply to the message displayed in the *Reading Pane*. This area is also used to look for an article in the *Knowledge Base* that can be used as a template for your email, and to view the notes related to the current email thread.

- The *Notes Editor* is used to enter some internal comments regarding the email interaction you are working on that may be of help to other agents who may be working on this case in the future. When you use the *Reply Editor* to look for a Knowledge Article, the *Notes Editor* will display the content of the articles that you select for preview.

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Note: When you look for cases, the *Context Information Area* will look different. For more information, see section **How to Send a Follow-up Email**.
How to Review an Incoming Email

After you have accepted or retrieved an email for processing, normally your next step is to review its content. The recommended order of email content analysis is given as follows.

Step 1: Check for an email thread identifier

1. Locate the email subject line that is displayed above the email message body in the Message tab of the Reading Pane.
2. If the subject line has an email thread identifier, this is an indication that the email is part of an existing case.

Step 2: If there is an email thread identifier, review the case history

1. If you want to review the case history before replying, click the History tab.
2. All incoming, transferred, and outgoing emails related to this case will be listed in the chronological order.
3. Any notes that you or other agents provided with respect to this case will also be listed with the notes icon. You can select any particular message to view its content in the message body area.
4. To return to the current message, click the Message tab.

If the email subject does not contain a thread identifier, this is an indication that the email is a new customer request and a new case has just been created for this request in the system.

Step 3: Read the email message

Your next step is to review the email message itself and understand how this email should be processed. Some emails may contain attachments that may also have to be reviewed before any further processing steps. If the email was sent with attachments, the file names of those attachments will be listed in the Reading Pane below the subject line of the email message.

Attachments
Step 4: Open attachments

To open an attached file, click its file name in the Reading Pane. The exact attachment viewing process depends on a number of factors including the type of file, your computer settings, and your company security policies. You will receive detailed instructions about working with email attachments from your system administrator.

Incoming email interactions can also be accompanied with web pages and forms that can provide additional information about the requested service. In this case, you will see a URL tab next to the Case tab above the reading pane. To view the web page content, click the URL tab. The content of this tab depends entirely on the type of services that you provide and is not discussed in this Agent Guide. If this tab is displayed for emails that you handle, you will receive detailed instructions about its content from your system administrator. See section Understanding Screen-pop for more information.

Step 5: Select a case category

A case can be categorized according to its content. After reviewing the email content, you may wish to select a category (e.g., "Miscellaneous" or "Damaged Product") for this case, which will help you to sort cases of differing categories later. The category selector is found underneath the case number and subject line at the top of the email.
Step 6: Review other included information

You can also look for information related to the content of the incoming email in the Knowledge Base. In the Reading Pane, select a fragment of the original email that is likely to be found in some articles of the Knowledge Base (e.g., a product name or model number). Click the button. The Knowledge Base will display a list of articles that contain phrases matching the selected fragment. For more information, see section Knowledge Base.

How to Mask Sensitive Data

Depending on the type of services that you contact center provides, incoming emails may contain some sensitive data that people not familiar with Internet security risks can include in their messages. Examples of such data include payment card numbers, access codes, and clients’ personal health information. Handling of such data may be governed by various laws, industry security standards, as well as internal policies of your organization. Thus, while reviewing incoming mail, you may be expected to identify such data and make sure it is masked before the email is further processed and stored. (Data masking is the process of hiding original data by replacing it with random characters.)

To mask a fragment of an incoming email, in the Reading Pane, select the text containing sensitive data. Click the Mask command that will appear in the tool tip above the selected text.
How to Close an Email without Replying

Some emails that you receive may not require any follow-up from your contact center. Some examples of such messages are customer emails confirming successful fulfillment of their requests, messages sent by accident (wrong address), and mass email containing some advertising (spam). If an email you are reviewing does not require a response, you can close it without replying.
When you close the email, you should first select a disposition explaining the reason for closure without replying. The disposition selector is located in the lower left corner of the Reply Editor. In addition to dispositions, you can also enter free-form text notes to provide more information about closure of the interaction.

After selecting a disposition, click the Complete button. The email and the associated case will be closed. You are likely to receive a new interaction for processing shortly.

Disposition selector and Close without reply button

How to Change an Assigned Email Service

Any incoming email will be automatically associated with one of the email services configured in your system. Email services play the same role as phone call services. They are used, in particular, to make sure that emails are delivered to the agents who know how to handle them. In order to identify the requested service, the system analyzes the subject and body of the email to match some predefined keywords that would be typically associated a given service. This process is called categorization. For example, in order to associate an email with a technical support service, the system may check emails for presence of words problem, issue, help, support, etc. If the system cannot find any keywords in the incoming email, the email will be associated with a general (default) service.

If your customers normally use web forms to compose their email service requests, the above process will guarantee reliable service identification for almost every email. When customers use a general-purpose email application to contact your company, there is a greater chance that an email may be categorized insufficiently (i.e., associated with a default service) or incorrectly (i.e., associated with a wrong service).
Therefore, the first step in processing of a new email is to verify the associated service, and if necessary, change such automatic association. Note that this step can be skipped for emails that are part of the existing cases; see section How to Review an Incoming Email for more information.

When you review an incoming email, the currently assigned service is displayed in the Reply Editor.

Currently assigned service

Note: For emails distributed via the Push method, you will also see the service name in the alert pop-up window. For emails distributed via the Pull method, you may be able to see abbreviated service names in the team queue.

If the service association is correct, you can proceed to composing a reply. If the service is assigned incorrectly, there are several possibilities:

- You know what the correct service is, and you are qualified to handle it.
- You know what the correct service is, but you are not qualified to handle it.
- You do not know what the correct service is.

If you know the correct service and you are qualified to handle it, you should normally change the assigned service and keep this email at your desktop for further processing. To change the service, click the drop down icon next to the currently assigned service name. The menu will show the services that you are qualified to handle. Select the correct service and proceed to composing a reply.

Service change

If you know what the correct service is, but you are not qualified to handle it, you should transfer the email to the correct service. If you are not sure what the correct service is, you can transfer the email to your supervisor or another agent. For more information, see section How to Transfer an Email.

How to Transfer an Email
A transfer is sending an email to another resource within your contact center for further processing. As mentioned in the [How to Change an Assigned Email Service](#) section, the most likely reason you may need to transfer an email is when you are not sure how to process it. In this case, you can either transfer the email to another service queue, or to another agent, or to your supervisor.

### When You Know the Correct Service

If you receive an email that you are not qualified to handle, but you know what the correct service is, you can transfer this email to the correct service.

To transfer the email, follow these steps:

1. In the Category selection menu, select the service category to which the email should be transferred.
2. Click the **Transfer** button.
3. In the dialog window that appears, select the desired service, person, or team.
4. If you do not see the desired selection on the screen but you know its name, you can enter it in the **Search** field.
5. Click **Transfer** to confirm the assignment.

The email will be removed from your desktop and will appear in the queue of the team that is qualified to handle the service that you selected.

### When You Do Not Know the Correct Service

If you do not know what the correct service is, you can transfer this email to your supervisor or another agent who may have this knowledge.

To transfer the email to a supervisor or another agent, follow these steps:

1. Click the **Transfer** button (see the previous instructions).
2. In the dialog window that appears, select the desired person.
3. Click **Transfer** to confirm the assignment. The email will be removed from your desktop and appear on the desktop of the supervisor or agent to which you have transferred this email.
When you transfer emails to other agents, consider providing some explanation using the notes editor. If you enter any notes, the other agents will see them and understand the reason the email is transferred to them.

How to Forward an Email

Unlike transfer, email forwarding is used to send an email to an external email address. To forward an email to an external address, open the menu next to the Reply button and select Forward.

An email draft will open with the original subject preceded by Fwd: and an empty To field. Specify the email address of the party you are forwarding the email to in the To field. If necessary, add cc and/or bcc recipients. Consider adding some text in the email message body explaining the reason for email forwarding.
Email forwarding

When the mail is ready to be sent, click the **Send email** button. The email will be sent to the specified external address. You will no longer be able to edit the email, and, depending on your service configuration, you may be placed in the *After Call Work* state. You can use this mode to complete the interaction processing. For example, you may be expected to select a disposition for this interaction.

Click the disposition selector and choose an appropriate disposition. If necessary, enter free-form text comments in the *Notes Editor*.

Disposition selector and Complete email interaction button

Click the **Complete** button. The interaction processing will be finished. You are likely to receive a new interaction for processing shortly.

**Note:** You can also select disposition and/or enter notes before sending the email.

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**How to Change Default Email Font**

Agents may set their personal font style for email replies and drafts. Settings for font face, size, and text color can be changed in Agent Desktop *Settings*. 

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Step 1: Update your Settings.

To customize your email font, navigate to Settings and select Default email font.

Step 2: Select desired font style.

The following dialog box will pop up, offering a selection of font face, size and face color. Select and preview the desired font face, size, and color. Then click Ok to save your changes. Your default email font settings will be saved and applied to all new drafts and replies.

Step 3: View new font settings in email drafts and replies.
To check that your new email font settings have been applied, open a new draft or a reply to a message. When a new draft is opened or when a reply is started, the font in draft is automatically set to your default font.

If you remove font formatting from a selection of pasted text, the font will return to the user default as specified in Settings. When you receive an email as a transfer from queue with the existing draft in place, the font in the draft does not change unless you remove font formatting manually.

**How to Compose a Reply**

If you are qualified to handle an incoming email, then after reviewing it, your next step will be to reply to the customer. This section explains how to compose an email reply from scratch. For using articles from the Knowledge Base in your email communications, see section Knowledge Base.

**Step 1: Begin writing your draft**

1. To compose a reply, click the Reply button.
2. An email draft will open with the original subject preceded by Re: and the To field showing the customer's email address.
3. If necessary, add cc and/or bcc recipients.
4. Type your reply directly in the text field of the Reply Editor. The editor has some text editing tools that allow you to enhance the appearance of your email. These include various font styles and sizes, font and background colors, bulleted and numbered lists, and paragraph alignment.
5. You can remove any previously applied formatting by clicking the Remove formatting icon.

**Note:** Depending on the amount of information in your reply, you may consider enlarging the editor window by dragging its splitters down and/or left.
Step 2: Attach files if needed

You can attach files to your email.

1. To attach a file, click the Add attachment button and select the desired file. Repeat this step to attach more files. Names of the attached files will be displayed below the address field of the message that you compose.
2. To remove a previously attached file, click the X icon next to it.
Depending on your contact center configuration, you may see some standard messages pre-inserted into the text field for each reply you are composing. These messages may appear above (the header) and/or below (the footer) the area of the main text of your reply. Some examples of such messages are references to case numbers, legal disclaimers, and company’s contact information. These messages are editable.

**Step 3: Review and send**

1. When the reply is ready to be sent, click the **Send email** button. The email will be sent to the customer. You will no longer be able to edit the email, and, depending on your service configuration, you may be placed in the *After Call Work* state. You can use this mode to complete the interaction processing. For example, you may be expected to select a disposition for this interaction.
2. Click the disposition selector and choose an appropriate disposition.
3. If necessary, enter free-form text comments in the *Notes Editor*.

**Step 4: Complete the interaction**

Click the **Complete** button. The interaction processing will be finished. You are likely to receive a new interaction for processing shortly.

**Note:** You can also select disposition and/or enter notes before sending the email.

**How to Use My Follow-ups to Send a Follow-up Outbound Email**

Depending on the type of service you provide, a single reply may not always be sufficient to fulfill the customer request. For example, the initial reply may simply inform the customer that the request has been received and advise the customer of the estimated processing time, while the actual request fulfillment will be communicated via one or more follow-up emails. Such follow-up emails are placed in *Follow-ups*.

*Follow-ups* is a section of *My Cases* that contains cases that have been marked for follow-up. A case is marked for follow-up when the agent sets a non-final disposition and when the agent clicks the pin button within the email preview or the opened email.
Drafting a reply and pinning the case

Because the pin button is available in both Preview mode and Opened Email mode, it is possible to follow-up without taking the email item from a queue. The pin button is, by default, checked when replying or dispositioning emails. The pin becomes unchecked and hidden when a final disposition is selected.

**Note:** Only emails that do not have a final disposition can be marked for follow-up. For more information on dispositions, see section [Dispositions and Notes](#).

**Viewing Follow-Ups**

All cases marked for follow-up are listed in *My Cases > Follow-ups*, which is located at the top of Agent Desktop.
Pinned cases appear in Follow-ups

Note that your own follow-ups are shown first. You can view the follow-ups of other users in your contact center by clicking the down arrow beside your name and selecting the name of the user whose follow-ups you wish to view.
Select a user from the Directory

In the example shown, we selected user Jeffery Lozada from the Directory.

Enabling Follow-ups

To view the *My Follow-ups* section in the *Active Conversations List* as well as to view the follow-up pin button, the **Enable Email Follow-up section** personal setting must be checked in *Settings*. From the *Settings* menu, select *Preferences*. 
Settings > Preferences

In Preferences, select the checkbox for **Enable Email Follow-up section**.

Select this checkbox to enable email to appear in My Follow-ups.

When checked, both the **Follow-ups** section and follow-up pin button are shown. If you do not wish to view **Follow-ups**, uncheck the box.

**Using My Follow-ups**

The **Follow-ups** queue shows the properties (i.e., name, subject line, etc.) of the first received email. To view the email message body, select/click an email item in the queue. The email message will appear for viewing only.

To reply to an email marked for follow-up, either double-click the email item or click the **Open** button at the bottom. The email message will appear as a draft. Note that the pin button is visible only if the email has been marked with a non-final disposition. For more information on sending replies, refer to section **How to Compose a Reply**.
Drafting a reply

If multiple agents pin the same email, it will appear in the *Follow-ups* section of all the agents who pinned it. When a final disposition is selected by one agent, the email becomes unpinned and disappears from the *Follow-ups* section of all agents who pinned it.

**Note:** Follow-up emails can also be sent by navigating to *Cases* in the *Active Conversations List*. For more information, see section *How to Use Cases to Send a Follow-up Outbound Email*.

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**How to Use Cases to Send a Follow-up Outbound Email**

Depending on the type of service you provide, a single reply may not always be sufficient to fulfill the customer request. For example, the initial reply may simply inform the customer that the request has been received and advise the customer of the estimated processing time, while the actual request fulfillment will be communicated via one or more follow-up emails.

To support requests that require multiple communications, each email is associated with a *case* and a *thread*. For more information, see *Understanding Email Cases and Threads*.

**Note:** If you wish to follow up on a reply that you sent recently, it may be easier to select it from the *Recent* tab.

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**Step 1: Find the case associated with the request**
When you have all the information required to compose a follow-up email for a particular customer request, you will first have to find the case associated with this request. Either the case number or the customer name can be used to find the case.

To view cases, select **My Cases** from the menu beside the *Active Communications List*.

**Step 2: Search for the case**

If the desired case is not shown in the *Context Information Area*, select **Contacts** from the main menu beside the *Active Communications List*. Then click **Cases** to display all cases.

Alternatively, you can search for cases by typing:

- The word "Case"
- Case number
- The customer’s name
- A fragment of the subject
- First name
- Last name

If you know the case number, enter it in the search field. Because case numbers are unique, only one case will be displayed in the list below.
Searching by case number

**Step 3: Browse, sort, and select the case**

For each case, its number, the creation date, and the original email subject line will be displayed. Depending on their length, subjects may be shown truncated in the list view. Hover over truncated subjects to see the full content. Cases matching search criteria will be listed.

Depending on your permissions, you will be able to see either the cases that you have previously worked on, or all cases for the services that you are qualified to handle.
Case search

You can sort listed cases by case number, creation date, and alphabetically by subject.

When you select a case in the list, all incoming, transferred, and outgoing email messages related to this case will be listed in the History tab in chronological order. Any notes that you or other agents provided with respect to this case will also be listed with the Notes icon. When you select any particular message, its content will be displayed in the message body area.

Note: As mentioned, case structure reflects business processes of your organization and services that you handle. You will receive specific instructions about handling cases and composing follow-up messages from your system administrator. As a general recommendation, remember that it is usually important to study the entire case history, including all the notes and dispositions that were entered previously for this case, before sending any new emails related to it.

Step 4: Email the customer

To send a follow-up email, double-click the customer email that this follow-up message will directly relate to or click the Reply button.

This email will appear in your Active Communications List. The Context Information Area will display the familiar email processing views and controls. For more information, see Overview of the Email Working Area.

From this moment, composing your follow-up email will be no different from composing the first reply. For more information, see How to Compose a Reply.

If you do not see the Open button for the email you wish to follow up on, this means that another agent is working on this email already.
How to Send a New Outbound Email

While follow-up emails are associated with existing cases, new outbound emails are emails that you send to your customers regarding matters unrelated to any existing cases. When you compose and send a new email, a new case is created automatically.

To send a new outbound email, select any email message listed in your Personal Queue and Open the message. Then click the Email draft button located at the bottom of the Reply Editor pane.

A new email draft will appear in your Active Communications List. The Context Information Area will display the familiar email processing views and controls. For more information, see Overview of the Email Working Area.

Draft your email as follows:

- Select the service with which this email is associated.
- Specify the recipient email address. Note that if you begin typing an email address that you have manually typed previously, the system will automatically complete the rest of the email address field for you.
• Add cc and/or bcc if necessary.
• Type the subject.
• Compose the email itself.
• Click Send.

Your email will be sent and a new case will be created. If the customer replies to your email, his reply will be automatically associated with that new case. Subsequent processing of the customer reply will be no different from processing of incoming emails.

How to Save an Email as a Draft

If you have started working on a reply or an outbound email, but you unable to finish it at the moment for any reason, you can save such an unfinished email as a draft in your personal queue. To save an email as a draft, click the Save draft and complete interaction button.

Note: If you are saving a draft because your working shift is about to end, consider making yourself Not Ready before saving the draft. Otherwise you may get a new interaction right away. This note is only essential if the emails are delivered to you via the Push method.

The email draft will be removed from your Active Communications List and saved in Personal Queue. You will be able to retrieve it and continue its processing at any time. For more information, see section How to Retrieve an Email from Your Personal Queue.

Note: If you have any unfinished emails on your desktop when you log out of the system, all those emails will be saved as drafts in your personal queue automatically. You will have to retrieve them manually in order to finish their processing the next time you log in.

How to Search Email Cases

As you work with more customers and fulfill more customer requests, you will accumulate a growing collection of cases. From your Agent Desktop, you can search through your cases easily using a string search in any language.

Note the privilege to search cases and contacts must be enabled by your contact center administrator.
Search strings are typed into the text input field

**Search String**

To search your email cases in Agent Desktop, navigate to the **Contacts** center, select the **Cases** tab, and type in any character(s) (i.e., letters and/or numbers) into the **search term** field. In addition, you can enter email addresses, names, date of birth, case numbers, contacts, and email subject strings.

In the search results, the first 200 cases/contacts are displayed, with the newest entries displayed first.

**Case Number**

When a new email request arrives, the system creates a case for it automatically and assigns a number to this case that is unique within your contact center (e.g., 1185). This number is typically communicated to the customer and can be used by both the customer and yourself to refer to the given request in all future communications. If you know the case number, you can enter it in the search string input field.
If you are familiar with a case or customer’s email address, you may search for it. In the example shown, entering the complete email address in the search string input field returns all matches in the system. Entering the search tag email: XXX will search email fields specifically. Note: XXX represents an email address.

You may search for any part of an email address by using the email: filter, followed by the desired part of the email address. For example, a search for “email:ma” could return results such as “example@gmail.com,” “masha@example.com,” and so forth. Additionally, including the “@” symbol in a search is another way to find email addresses.

You may search by email address

Name

In the example shown, entering a partial or full name in the search string input field returns several results with name data.
Search by first name, last name, or full name

**Subject**

Email subject lines may be searched for either whole or in part; the search recognizes individual words.

You may search by email subject

For more information about email cases, see section [Understanding Email Cases and Threads](#).
How to Print an Email

A single-click control allows you to open, view, and print original email content in a pop-out tab or window of your web browser. The original email content can be printed using the "Print" option of the web browser itself.

To print email content, follow these steps:

1. In either your Team Queue or Personal Queue, open the desired email by selecting it or double-clicking it in the list.

2. Mouse over the subject line of the email message. Doing so causes additional email control options appear.
Mouse over the email's subject line

3. Click the **Show original email content** button. The email message will open in a new browser tab or window, depending on your browser settings.
How to Copy and Paste Images into Email

When replying to or forwarding emails, images can be inserted directly into the body of messages using your computer's copy and paste commands; print screen and snipping tools may be used to do this. Inserting images into the body of email messages may allow you to increase your email response time.

To insert an image, first, copy it using your preferred copy method. Next, insert your cursor within the body of the message and use your computer's paste command; the image will appear inside the email body.
General Information About Contacts

One of Agent Desktop's many useful features is the Contacts section. From Contacts, you may quickly reference a wide variety of stored information. The Contacts section stores information about:

- A person's contact details
- Activity history
- Cases
- Call recordings
- Chat transcripts

All information is searchable, enabling you to look up records and contact information, even while handling an active conversation.
Agent Desktop Contacts section overview

How to Access Contacts

The Contacts section of Agent Desktop is accessed by clicking the Contacts icon in the main menu.

Upon opening Contacts, you will first see the Search page, which allows you to search all stored contacts in your contact center. From there, you can do the following:

- Enter Search terms for quick lookup
- Open Contact details
- Create new contacts
- Delete contacts
- Browse Cases

Search

The Contacts Search page allows you to search all stored contacts in your contact center, as well as manage contact entries, view contact details, navigate to activity history, and browse cases.
Clicking on any contact's name in the list of contacts will open the Details form for that contact, which displays all contact information available for that individual person.

**How to Use Search**

In the text entry field at the top of the screen, you can enter search terms for quick lookup of specific keywords found in stored contacts. If your search returns results, you will see a list of contacts that include the search term you entered.

**Managing Contacts**

Buttons at the bottom of the Search page allow you to manage contacts.

- To create a new contact, click **Create**.
- To open contact details for a selected person, click **Open**.
- To delete a contact, click **Delete**.
Accessing Cases

From the Search page, you can navigate to Cases by clicking the Cases tab at the top right of the page. Any stored cases that you have handled will be listed on the screen. You can sort and search cases.

Cases tab

To return to Contacts Search, click the Contacts tab.

Searching Contacts and Cases

You may search contacts and cases for the following information.

Company

Company names may be searched for either whole or in part; the search recognizes individual words. To search for a company by name, enter **company: XXX**. Note: XXX represents the name of the company.

Date of Birth

You may search for the date of birth of a contact in your local date format. For example, in the US, the local date format is DD/MM/YYYY. To search for a specific date of birth, enter **dob: DD/MM/YYYY**.

Email

If you are familiar with a case or customer's email address, you may search for it. In the example shown, entering the complete email address in the search string input field returns all matches in the system. Additionally, entering the search tag **email: XXX**, will search email fields specifically. Note: XXX represents an email address.

Details

The Details page displays the contact details form for a selected contact. If information has already been saved for that contact, you will see that information on the form.
Contact Details

Contact details may include the following:

- Name
- Profile photo
- Phone numbers
- Email addresses
- Mailing address
- Company information
- Titles
- Website URLs
- Summary
- Other identifying information
- Tabs for accessing activity history, pending calendar appointments, and cases

How to Edit Contact Details

Information may be added to the form by clicking the Edit button. To save your changes, click Save.
Editing contact details

**Augmentation**

If data augmentation has been configured for your contact center, you will be able to populate contact details with data from data providers such as The Data Group or Next Caller. If this feature is enabled for your contact center, you will see the **Augment** button on the contact details Edit screen.

Click **Augment** to view available data that can be used in your contact details. If you wish you use the provided data, click **Use**.

Click "Use" to augment your data with the provided data

The following dialog will appear, asking you to confirm the data to be added to the contact details that you are editing.
Activities

The Activities tab stores the selected contact's records for all types of conversations (i.e., voice calls, emails, chats, SMS/text messages, Messenger interactions, etc.) that have been handled by your contact center. Activities are searchable, enabling you to access specific information quickly, even while handling an active interaction. Built-in contacts show records of all interactions and cases, if any, for the selected contact.

The Activities tab is accessed from contact details.
Activities tab is accessible from contact details

**Using Activities**

The Activity tab displays all activity history for a person. This includes voice calls, call transcripts, speech-to-text transcripts, chat interactions, chat transcripts, email messages, Messenger interactions, Messenger transcripts, SMS/text messages, notes from agents, and so forth.
Activities are shown for the selected contact

On the left side of the screen, you will see the records of all activities and interactions involving this contact in order by date, with the newest at the top of the list.

When you select a specific activity, the right side of the screen will display additional information. Depending on the interaction type and your privileges, you may also be able to review the associated interaction content, such as call recording or chat transcript.

**Pending**

The Pending tab shows uncompleted calendar appointments. The tab shows only uncompleted calendar events regardless of whether the appointment time is in the past or in future.

The Pending tab is accessed from the contact details screen.

Pending calendar appointments

**Cases**

The Cases tab is where you may search for cases associated with a selected interaction. Cases are useful as they keep track of not only the interactions, but also related notes from multiple agents, and any subsequent follow-up activities, all the while keeping the content available to anyone on your team.

By default, cases are emails; however, cases also may be created from chats or calls. Cases can be filtered by status (active or closed) or by additional filters; these filters are:

- Relevance
- Create time
- Update time
- Last customer update
- SLA Age %
- From
- Subject
- Flag
For additional information about creating cases, see the sections Understanding Email Cases and Threads and How to Create a Case from a Chat Session.

Searching for a Case

To search for cases, use the search bar at the top of the contacts section; searching may take place while on active calls or chats. You may search for cases by name, case number, or case title. The results of the search will appear under the Cases tab of the Contacts section. Additionally, cases may appear as a tab in the Selected Conversation’s Documents section if you are having an active conversation. If you have not sent an email from the case, it will be listed as Active; cases where a follow-up email was sent will be listed as Closed.

Sending Follow-Up Emails from Cases

When selected, the case with the chat transcript will appear in the right panel; click the Open button at the bottom of the panel. From here, you will have the option to send the customer a follow-up email, flag it, or transfer the case to another agent. To transfer the case, click the transfer button. When an email is sent, it will be included in the case record.
Opening a case allows you to email the customer

Ways to Access Contacts

On the Agent Desktop, there are many ways to display a contact's details.

You can access contacts by

- Searching and opening a list of contact results (see Contact Search, where the search combs all text and address/phone fields)
- Clicking on a photo on a contact pop-up
Clicking on a photo on a contact pop-up

- Viewing a case

Mousing over a contact's name from a case

- Clicking or mousing over the email address bar. Mousing over an email shows an email message icon to the right of it; clicking the icon creates a new email case with a new draft.

Mousing or clicking a contact's name in the email address bar

- Browsing the directory and recent conversations list and mousing over a person's name or a conversation. Mousing over a phone number shows the SMS message and phone icons; clicking on either creates a new call or SMS chat. If there is a conversation with this contact already, the chat or call is merged into that conversation.
Mousing over a contact's name in the directory

- Clicking on a photo on the top bar during a conversation

Mousing over a contact's name during a call

- Clicking on a photo in the calendar when an event has a linked contact

Mousing over a contact's name linked to a calendar event

- Entering a contact link in the Search input field
Using the Search input field

- Clicking or mousing over on a contact link in an internal chat

Clicking or mousing over a contact during chat

- Clicking on details presented to you in screen pop

**Presentation of Contact Details**

A contact’s details are displayed as either a form or a list.

- A Summary form presents the summary of a contact, name, photo, and essential addresses.

Contact details

- A Detail form includes the same information as the Summary form, plus other detailed information, such as description, birthday, and so forth.
• The list of pending items shows cases and calendar events.
• The list of associated completed activities shows all finished activities/interactions that are associated with the contact.
• The list of associated cases shows all cases/emails associated with the contact.

The contents of forms can be edited by clicking the **Edit** button.

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**How to Create a New Contact**

There are several ways to create a new contact (i.e., add a new record) in Agent Desktop. You can enter details for a new contact manually via the Contacts search results, or you can add a new record quickly from a number of contact summary pop-ups. The ways to create a new contact are described as follows.

**Search Results**

1. On the Contacts Search results list, click the **Create** button at the bottom of the screen.

   Filling in the contact Details form

2. The Contact Details form will open, and from there, you can enter all contact information.
Filling in the contact Details form

3. Click **Save**.

"Add New" Option on Contact Pop-Up

1. On the Active Conversations List, click the **Recent** tab.
2. Hover your mouse cursor over the contact's name.
3. If no details have been saved for that contact, the contact summary pop-up will provide links labeled **new contact** and **add to existing**.

   Click "new contact"

4. Click **new contact**.
5. The **Add New Record** pop-up will appear with four basic fields to complete: name, phone extension (which may be pre-filled for you), email, and photo.

   Add New Record

6. Click **Create** to create a simple record quickly, or click **Add and Edit** to add more information to an existing contact.
Calendar

1. On your calendar, add a new event.
2. Click the + sign at the bottom of the pane where you edit event details. The + sign allows you to assign a contact to the event.

Assign a contact to a calendar event

3. Click **Enter manually (or directory)**.

Assign a new contact by typing in the name

4. Enter the name of the new contact and select the checkbox for **create contact**.
Type in the name of your contact

5. At the top of the pane, click Save. If you do not save the event details, your new contact will not be created.

How to Edit to an Existing Contact

After a contact has been added, it may be necessary to add to or change the listed information. Note: In order to edit a contact’s information, the privilege must be enabled by your contact center administrator.
Editing an existing contact's information

To edit an existing contact's information, follow these steps:

1. Go to the Contacts section.
2. In the Contacts tab, find the contact that needs editing.
3. To view the contact's information, either double-click on the contact name or highlight it and click the Open button.
4. After opening the contact's information, click Edit to add to or remove information.
5. When you are finished editing the contact's information, click Save.
6. If you made edits to a contact's information but do not want to save them, click Cancel.

Contact Augmentation

If your contact center is integrated with an external database (e.g., NextCaller), it is possible to merge matching customer contact information through augmentation. Note the setting that allows augmentation must be configured by your administrator in order to work.
When augmenting a contact, choose which information to merge in Agent Desktop

To augment an existing contact's information, follow these steps:

1. Go to the Contacts section.
2. In the Contacts tab, find the contact that needs editing.
3. To view the contact's information, either double-click on the contact name or highlight it and click the Open button.
4. After opening the contact's information, click Augment and a directory will open.
5. Click the boxes next to the information you wish to merge into Agent Desktop; you may choose to import all contact information from another site (e.g., LinkedIn) or only specific fields (e.g., Name, Email, etc.).
6. After selecting the information, click OK.
7. If you do not wish to proceed with the augmentation, click Cancel.

Note: If you do not have an integrated external database and click Augment, a small pop-up window will display the message, "No data."
How to Use Personal Chat

At any time during your working session, you can send a Personal Chat message to your supervisor or another member of your team. The use of Personal Chat does not affect your operations with service interactions in any way.

How to Send Personal Chat Messages

There are two ways to send Personal Chat messages:
1. From within the **Directory**
2. From the **Personal Chats** section of the **Chat Center**.

**From the Directory**

- Select the desired contact from the **Directory**.
- Clicking the **Chat** icon next to the contact’s name in the **Directory** will launch a new chat.
- To send a message, type in the **Text Input Field** area, then press the **Enter** key or click on the **Send the message** icon.

**From the Chat Center**

- To access the **Chat Center**, click on the icon.
- Next, go to the **Personal Chats** section and click on the + icon to bring up the **Directory**.

Choose **Select from Directory**
From the Select Agent for Chat directory, search for the contact you would like to message, click on their icon, then click the Select button.

To send a message, type in the Text Input Field area, then press the Enter key or click on the Send the message icon.

Additional Features of Personal Chat

- For added organization, it is possible to filter messages by day, week, month, or all.
- Messages will appear with a timestamp in the chat transcript area above the Text Input Field.

Starring a Message

It is possible to bookmark important, individual messages within a chat by clicking the Star icon. When you star a message, it becomes pinned to the area right of the chat in the Chat Center. Please note: You can only star received messages, not sent ones.

To star a message, follow these steps:

1. Find the message.
2. Click the Star.
3. The star will have changed from a light color ☀️ to a dark color ⭐️.

From here, you will see the starred message appear in the area to the right of the chat.

Example of a starred message

When you click on the starred message, it will act as a shortcut, bringing the message to the top of the chat area.
Starred messages act as bookmarks within a Personal Chat

How to Use Group Chat

The Group Chat feature allows agents, supervisors, and other users to chat within your contact center. Many features of Group Chat are similar to Internal Chat and Service Chat; however, Group Chat is not for chatting with individual users or customers.

For more information on Internal Chat, see How to Use Internal Chat. For more information on Service Chat, see sections about Handling Service Chats.
Overview of Group Chat

**How to Access Group Chat**

Group Chat is accessible through the *Chat Center*. To access the *Chat Center*, click on the icon. To initiate a Group Chat, click **Create New Group** (this is the + icon to the right of #Groups).

**How to create a new Group Chat**

**Renaming a Group Chat**

The default Group Chat channel name is *#New Chat Group*. To rename a Group Chat, click in the *#New Chat Group* field and type the new name. When you are finished, click anywhere outside of the field and the new name will save.
Edit the name of a Group Chat to stay organized

Managing Group Chat Members

When you have created a Group Chat, you have the ability to add and remove members. Furthermore, any member in a Group Chat can *Invite* additional members.

Adding Group Chat Members

To add members to the new chat group, follow these steps:

1. Click the + icon in the *Invite* area of the Chat Center.
2. The pop-up directory *Select Agent for Chat* will appear. Use the search bar at the top of the directory or scroll down the list to find a user.
3. Click on the user you would like to add to your Group Chat and then click *Select*. Members may be added one at a time.

Selected members will be highlighted
Removing Group Chat Members

While anyone in a Group Chat can invite additional users, the creator of the group can remove any or all specific members. Additionally, any user can remove themself from a chat.

To remove a member from the chat Group, click the X icon to the right of their name.

How to remove Group Chat members

To remove yourself from a group, click the X to the right of any Group Chat.

How to remove yourself from a Group Chat

If you removed yourself from a group you did not create, the creator can Invite you again and all previous messages can be viewed. If you are the creator of a Group Chat and delete it, the group will be removed for all users.

Messaging and Notifications
Once you have created or are added to a Group Chat, you can send and receive messages regardless of your state (e.g. Ready, Not Ready, Supervising, etc.). To send a message, type in the Text Input Area area, then press the Enter key or click on the Send the message icon.

Example of a Group Chat

If you have been active in another chat or even logged out of Agent Desktop, when you return you will see the number of missed messages next to a given group.

Numeric display of missed messages from the "CSR Group Chat"

**Adding Attachments in Group Chat**

This feature is reserved for future use.

**General Information About My Grades**
My Grades 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 My Grades

My Grades Widgets

There are six widget options within My Grades 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 My Grades Views.

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 in My Grades by selecting from the drop-down menu

My Grades Views

The configuration of My Grades can be changed; either you or your supervisor can select what widgets to show in any of the six slots. If the widgets are changed, the current layout is saved upon logout.

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

List of My Grades Widgets

Choose the widgets you see in My Grades by selecting from the drop-down menu
The following is a list of the widgets available in My Grades, including descriptions of what they do. Widgets are listed in alphabetical order.

**Agenda**

The *Agenda* widget displays upcoming agenda items from your and your team's *Calendar*. If there is no agenda, the widget will display text stating so.

The widget shows your schedule for today based on the current time (all items currently in progress and scheduled later than the current time). Items in progress or items that are due in less than 10 minutes are shown with a red bar on the left side. Items that are due in less than 2 hours are shown with a brown bar on the left side. Other items are shown with a blue bar on the left side.

If the number of scheduled items is too large, then the widget shows the top few items and dots ("..."). If you click within the widget, Agent Desktop navigates to the Calendar.

![Agenda widget](image)

**Alerts**

The *Alerts* widget displays the last delivered supervisor's internal chat message. If a new message is delivered, it replaces the previous one. If you click within the Alerts widget, Agent Desktop navigates to *Personal Chat* and the current message is considered "read" and is removed from the widget.
Break Time Remaining

The *Break Time Remaining* widget displays the total time used out of your allotted break time. If you hover your cursor over the widget, you may highlight either allotted break time or used time.

Dispositions

The *Dispositions* widget displays a count of all dispositions that have been assigned to handled tasks. If you hover your cursor over the widget, you may highlight information about any of the displayed dispositions.
The My Stats vs. My Team's widget displays metrics of your performance against the average of your team’s. The metrics are the following:

- **Handled**
  Displays the average number of handled interactions per hour.

- **Average handling time**
  Displays the average amount of time spent handling and completing interactions.

- **Successful interactions**
  Displays the percentage of successful interactions.

If you hover your cursor over the widget, you may highlight information about any of the displayed metrics.
Satisfaction

The *Satisfaction* widget displays a short list of *real-time metrics* related to a customer’s satisfaction.

You can also configure what real-time metrics are displayed within the widget. The metrics are:

- Custom Survey Metric 1
- Custom Survey Metric 2
- Demeanor
- Net Promoter Score
- Resolutions

Please note: Demeanor, Net Promoter Score, and Resolutions are the default metrics displayed.

**Configuring the Satisfaction Widget**

To change the metrics displayed in this widget, click the *cog icon* in the upper right-hand corner of the widget. A pop-out window will allow you to select the desired metric.
Satisfaction metrics selection

Metrics available for display will be seen in the *Available* box on the left and metrics already displayed will be seen in the *Included* box on the right.

- To add a metric, select the button with the greater-than symbol.
- To remove a metric, select the button with the less-than symbol.
- To add all metrics, select the button with two greater-than symbols.
- To remove all metrics, select the button with two less-than symbols.

**General Information About Knowledge Base**

*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.

How to Use a Knowledge Base Article

There are several ways to access Knowledge Base and search articles. To use a Knowledge Base article in your message to the customer, either mouse over the customer’s email in the Reply Editor and click the magnifying glass icon, or click the orange arrow to expand the Knowledge tab.

Accessing Knowledge Base

The Knowledge tab shows you the contents of Knowledge Base and lets you browse the listed articles. Articles in the list may be arranged in folders and sub-folders reflecting the organization of knowledge in your contact center. Names of folders are shown with the Unfold/Fold icon next to them. To open a folder, click the Unfold icon. Names of articles do not have any icons next to them. Then click Use to place the selected text in your email draft to the customer.

Another way of finding an article you need is by using the search field. Type a word or phrase that this article is likely to contain in the search field. Use quotation marks for the exact phrase match. Matching articles will be listed below.
Knowledge Base folders, articles, search field and filters

By default, the contents of the entire Knowledge Base are displayed or searched. However, some articles may be pre-associated with services that your contact center provides. To see only the articles related to the service of the interaction you are handling, select the **only for this service** checkbox.

Note that an article may be assigned are a default reply for a particular service. In this case, the text of the article will automatically appear in the drafts for all emails associated with this service.

When you select an article, its entire contents will be displayed below in the *Notes Editor* space. The article content is shown in three tabs: Keywords, Answer, and Usage Note
Keywords Tab

The *Keywords* tab normally contains a statement of customer problem or question that this article will addresses. In a more general sense, this field can be used for any kind of information that will help you find the article using the search function (see above) and quickly assess relevance of the article to the email being handled. When you use the article as a template, the content of this tab will not appear in the email draft or chat text input field.

Answer Tab

The *Answer* tab contains the answer to customer's problem or question. When you use the article as a template the entire content of this tab that will be inserted into the email draft or chat text input field. This part of the article may contain some substitution fields that will obtain data from your working session and the email that you are replying to (e.g., first and last name, case number, and customer's email address).

Usage Note Tab

The *Usage Note* tab contains notes, comments, and suggestions regarding usage of this article. These notes may come from the author of the article and/or the agents who may have used it before. When you use the article as a template, the content of this tab will not appear in the email draft or chat text input field.

To use the article in your email or chat, click the **Use** button. The content of the *Answer* tab will be copied to your email draft in the *Reply Editor* or the text input field of your chat message. You can edit the text of the article as may be necessary to adapt it to your specific case before sending it.

**Note:** You can also initiate a search for information related to the content of the incoming email directly from the Reading Pane. For more information see section *How to Review an Incoming Email*.

Contributing Content to the Knowledge Base

Depending on your qualifications, you may be able to edit existing articles in the *Knowledge Base* and add new articles to it. If you are authorized to contribute content to the Knowledge Base, you will see editing controls when you click the *Knowledge* tab.
To edit or delete an existing article, select it from the list above and click the Edit or Delete button respectively. To add a new article or folder, click the Add button and select the type of item you wish to create.

If you are adding a folder, in the dialog window that appears select the Parent Folder for the folder that you are creating (leave the field blank to create your folder in the root folder), and enter the name of the folder. The name should be unique within the parent folder.

If you are creating or editing an article, define or edit its properties in the dialog window that appears. Most of this properties are explained in section How to Use a Knowledge Base Article.
Creating or editing a Knowledge Base article

Note the following:

- The name of the article (the Title field) should be unique within the parent folder.
- To create the article in the root folder, leave the Parent Folder field blank.
- When assigning an article to a service, select the Assign checkbox. This association will be used to limit the article search by the service assigned to email interactions. You can assign an article to any number of services.
- If you select the As default checkbox, the Answer text of this article will be automatically inserted into draft reply to every email associated with the given service.
- You can use substitution fields in the Answer text. These fields will be replaced with data that the system will obtain from your working session and the email that you are replying to. The following substitution fields can be used:
  - $(user.firstName) – first name of the agent who will be using this article for reply
  - $(user.lastName) – last name of the agent who will be using this article for reply
Dashboard

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, it 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.

Example of an active Dashboard

Dashboard Metrics

The Dashboard uses real-time metrics to help agents and supervisors easily monitor important areas of work. Dashboard metric names are displayed above Agent Desktop’s Context Information Area as abbreviations. The following is a list of these abbreviations, their corresponding metric names in parenthesis, and their definitions.

Please note: The abbreviations listed here can be renamed by your administrator, including Dispositions and Service Names. The following metrics abbreviations are the default abbreviations. If you see an abbreviation in your version of Agent Desktop not listed here, please contact your supervisor/administrator for the correct definition.

AACW (Avg ACW Time)

AACW is the average daily time agents spend handling after-call work (ACW).

CH (IN Handled)

CH is the number of inbound interactions that have been handled and completed by agents for the day.

CM (OUT Dialed)

CM is the total number of outbound calls agents have placed for the day.

CR (OUT Call Rate)
CR is the current number of outbound calls being attempted by agents per minute.

**CRA (OUT Routed)**

CRA is the number of outbound calls that were queued and then routed to agents for the day. If a call is routed to an agent more than once with the same service, it is counted multiple times.

**CT (IN Transferred)**

CT is the number of inbound interactions that have been transferred to an external service.

**Dispositions**

Dispositions are labels used to categorize the results of interaction attempts and are a subcategory of Service Name metrics. Dispositions are customized and defined by your contact center administrator but the system does provide pre-defined dispositions. For example, dispositions for an email service might include "Spam" or "Problem solved." The total number of dispositioned transactions can be tracked and monitored.

**HR (Call Handling Rate Per Hour)**

HR is the average of all calls made per agent per hour.

**OCH (OUT Handled)**

OCH is the number of outbound interactions being handled and completed by agents, including non-replies via email.

**Q (IN Waiting)**

Q is the number of inbound calls currently in Queued state. This includes both inbound calls and callbacks dialed and answered by the customer.

**RR (Lists Remaining)**

RR is the approximate number of remaining records from a campaign (not including records from disabled lists).

**Service Name**

The Service Name is the text on the left of the Dashboard. The service name is the service type you are viewing metrics for. For example, a Dashboard displaying, "EmailService | WT: 25 | Q: 25," means for the service "EmailService" the maximum wait time (WT) is currently 25 minutes and the number of emails in queue (Q) is 25.

**SLA (IN Svc Level %)**

SLA is the percentage of calls answered before the threshold time (30 seconds by default) calculated over most recent 20 calls (short abandoned calls are excluded). For email interactions, it is the percent of emails replied to within the pre-defined service level threshold, relative to all replied emails; these include those replied to automatically and those replied to by the agent.

**SR (My Success Rate)**

SR is the percentage of calls handled per agent that received the Success type disposition type divided by the total number of calls with this service. This metric is calculated for all services the agent handles.

**TR (My Team Team Success Rate)**
TR is the percentage of calls handled per team that received the Success type disposition type divided by the total number of calls with this service. This metric is calculated with break-downs per service and per team.

**WT (IN Max Wait)**

WT provides the current wait time of the email that has been waiting in the queue the longest time (and is still waiting) - compared to all other emails currently waiting in the same queue. This includes service closure hours and is available for both Push and Pull distribution modes. Note that for email services this metric is updated once per hour. Note that an interaction can be requeued for another service either automatically or manually. In this case, the metric shows the interaction for the service it is currently waiting for but calculates the total waiting time since the moment the interaction entered the first service queue.

**Additional Dashboard Statistics**

There are up to three additional statistics that can be shown with a given Dashboard metric, for example Bad record: 25/24(26) (1st). The additional metrics are:

**Team ranking**

This value will indicate your personal performance and is displayed as an ordinal number, e.g., Bad record: 25 (1st).

**Show next value**

This value is the performance of the agent closest to you in current ranking and is displayed as a fraction, e.g., Bad record: 25/24.

**Show total dispositioned calls**

This value is your personal ranking within the team based on a comparison of the current value of the given metric for all members of the team; it is displayed as a number in parenthesis, e.g., Bad record: 25(26).

It is possible to display any combination of these metrics. Your system administrator may provide an additional explanation regarding the format of each displayed metric.

**Keyboard Shortcuts**

A number of keyboard shortcuts are available to help streamline your workflow within the Agent Desktop application. A list of these keyboard shortcuts is available in Agent Desktop in Settings > Keyboard Shortcuts.
Keyboard Shortcuts are found in Agent Desktop Settings

List of Keyboard Shortcuts

The table shown gives the key stroke and description for each keyboard shortcut.

<table>
<thead>
<tr>
<th>Key Strokes</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ctrl + F4</td>
<td>Logout from AgentDesktop</td>
</tr>
<tr>
<td>F6</td>
<td>Set focus on disposition selector</td>
</tr>
<tr>
<td>F8</td>
<td>Open state selector menu</td>
</tr>
<tr>
<td>F9</td>
<td>Set agent state to &quot;Ready&quot;</td>
</tr>
<tr>
<td>F10</td>
<td>Open Settings menu</td>
</tr>
<tr>
<td>Alt + 0</td>
<td>Select &quot;Non-call cases&quot; item in AIL</td>
</tr>
<tr>
<td>Alt + 1...9</td>
<td>Select interaction in Active Interaction List (AIL)</td>
</tr>
<tr>
<td>Alt + Shift + 1...9</td>
<td>Insert a number from Favorites into the number input field</td>
</tr>
<tr>
<td>Alt + A</td>
<td>Answer alerting interaction</td>
</tr>
<tr>
<td>Alt + F</td>
<td>Add to Favorites</td>
</tr>
<tr>
<td>Alt + Shift + F</td>
<td>Remove from Favorites</td>
</tr>
<tr>
<td>Alt + Shift + B</td>
<td>Blind transfer</td>
</tr>
<tr>
<td>Alt + C</td>
<td>Set focus on chat input text field</td>
</tr>
<tr>
<td>Alt + K</td>
<td>Set focus on chat messages</td>
</tr>
<tr>
<td>Alt + M</td>
<td>Flag the interaction</td>
</tr>
<tr>
<td>Alt + Shift + M</td>
<td>Unflag the interaction</td>
</tr>
<tr>
<td>Alt + N</td>
<td>Set focus on number input field</td>
</tr>
<tr>
<td>Alt + P</td>
<td>Open pre-recorded messages menu</td>
</tr>
</tbody>
</table>
### Ways to Request Assistance

While handling a service interaction, you have multiple ways to request assistance:

- **Flag the interaction by clicking the Flag button.** The request for help will be displayed on the supervisor's screen. The supervisor may then connect to your service call in Coaching or Barge-In mode. In Coaching mode, you will hear the supervisor, but the other party on the call will not. In Barge-In mode, all three of you will be able to talk to each other as if during a regular three-way conference call. Depending on your system configuration, the supervisor may also be able to see your screen.

- **Use internal chat to contact an internal party that can help you.** For more information, see section [How to Use Internal Chat](#).

- **Make a consultation call to an internal or external party that can help you.** For more information, see section [How to Make a Consultation Call](#). Remember that after making a consultation call, you have several options, including returning to your primary call, transferring your customer to the consultation party, or connecting the consultation party to your primary call for a three-way conference. For more information on the latter two options, see sections [How to Transfer a Call](#) and [How to Host a Conference](#).

### How to Report a Call Quality Problem

Depending on your system configuration, you may be able to report problems with call quality, such as noise or silence, directly from the Agent Desktop application. If this function is available in your configuration, you will see the **report a call problem** link in the Contact Info Panel while handling calls and during the related after-call work.
It is easy to report a problem:

1. Click the link.
2. In the dialog window that appears, select the type of problem.
3. If you are not sure about what type of problem to report, select Other.
4. Click OK.

**Note:** The reported problem is unlikely to be resolved immediately. However, by providing a report, you will help your system administrators to become aware of quality problems and deal with their root cause in a timely manner.

How to Send Agent Desktop Application Logs to Your Administrator

During your work, you might at times encounter conditions that prevent you from working normally (e.g., unable to log in or perform a desired operation). Such conditions will normally be accompanied by error messages. Depending on the type of error, these messages may appear either in a separate window or in a pink banner in the upper bar of the Agent Desktop application as in the example below.
This guide lists most of the error messages that you may encounter and provides recommendations about what you can/should do when you encounter them. If the recommended actions do not help, you should contact your system administrator for help. (If an error message that you encounter is not listed, the only recommended action is to report this error to your system administrator immediately.)

When reporting a problem to your system administration personnel, it may be helpful to send them the corresponding application log. The log contains information about the action you were trying to perform when the error occurred and the conditions preceding this action. This information may help your administrator analyze and resolve the problem faster.

To send the log, select the About option from the Settings menu, and click the Log files link.

The folder where the application log files are stored on your computer will open. Select the most recent bpclient text file (the one without a time stamp in its name) and send it to your system administrator.
List of Error Messages

The following is a list of error messages that you might encounter while working in the Agent Desktop application. These error messages are presented in alphabetical order. Each provides recommendations about what you can/should do when you encounter them. If the recommended actions do not help, contact your system administrator.

If an error message that you encounter is not listed, the only recommended action is to report such an error to your system administrator immediately.

A limit of 50 favorite entries was reached.

You cannot enter a new favorite contact because you have reached the limit of 50 entries for your favorite contacts. Consider deleting some of your existing favorite contacts before entering new ones.

A problem with voice quality is detected, please check your network connection.

Agent Desktop continuously monitors voice quality parameters of your phone calls. This message is displayed when any of those parameters get out of the acceptable quality range. Once the quality improves, this message will be automatically removed from your desktop.

This message does not necessarily mean that you will not be able to carry on your phone conversation. In most cases, you should be able to finish your current call normally.
You can do the following to improve the voice quality:

- Close other programs that may be using your internet connection.
- If you are using a wireless internet connection, make sure you have a strong Wi-Fi signal.

If you keep getting this message, report the problem to your system administrator even if you do not notice any real degradation of speech.

If the degradation of voice quality is noticeable to you or to the people you talk to, consider making yourself Not Ready to prevent delivery of new customer calls to you and report the problem to your system administrator.

**Access denied.**

Depending on the security policies of your organization, your system may be configured to allow access only from a limited number of IP addresses. This message indicates that the address of the computer you are trying to log in from is not within the predefined address range. You can try to login from another computer or contact your system administrator for help.

This message may also be displayed when the system “believes” that you are trying to listen to a voicemail message intended for someone else. Double-check the corresponding email notification to see that it was sent to you from the system and not forwarded by someone else.

**Another user is already logged in with this phone.**

You may see this message when you log in with a hardware phone (option *An internal phone* of the *Phone Device* menu). It indicates that someone else is already logged on with the number that you have entered for your hardware phone.

Check the number that you have entered for your phone and try again.

**Exceeding limit of [XXX]KB per article for Knowledge Base.**

This error message indicates that the article you are trying to create for the Knowledge Base exceeds the maximum article size.

Try to shorten the article. If you believe the article cannot be shortened without affecting information or readability, contact your system administrator.

**Invalid username or password.**

Check the username and password that you have entered and try again.

**Microphone and speakers are not recognized.**
Make sure that your headset is properly connected to the computer.

**Microphone is not recognized.**

Make sure that your headset is properly connected to the computer.

**Not enough privileges for requested operation.**

You may see this message when trying to perform an operation that you are not authorized to perform. If you believe you should be allowed to perform the operation in question, contact your system administrator.

**Outbound calls not allowed.**

This message is displayed when you try to make an outbound call and indicates that you are not authorized to make any outbound calls. If you believe you should be allowed to make outbound calls, contact your system administrator.

**Phone call cannot be established.**

You may receive this message when trying to listen to a voicemail message that you received as a link in an email. It indicates that the attempt to call your phone has failed.

Make sure that you are logged on to your Agent Desktop application with a phone device option corresponding to your current phone setup and click the voicemail message link again.

**Phone is not present in dial plan.**

You may see this message when you log in with a hardware phone (option An internal phone of the Phone Device menu). It indicates that the number that you have entered for your hardware phone is not configured in the system.

Check the number that you have entered for your phone and try again.

**Phone line is down. Please dial in and keep line open to enable calling.**

This message is displayed as a reminder when you log in with the Dial in and keep line open phone device option. When you use this option for your phone, you should call a designated phone number as soon as you log in in order to set up the nailed connection.

Dial the designated number and follow the instructions.

**Please fill out required fields.**
You may see this message when working with a web form. It indicates that you are trying to complete processing of the form without entering all required information.

Check the form and fill out all fields marked with the red line.

**SIP phone has lost connection with the system.**

This is an indication that your Agent Desktop does not have a voice connection to the system. If you intended to login with a phone, but the phone is not active, a banner is shown that cannot be closed and you are placed into a special "Not Ready" agent state.

This message may be shown if you are logging in with one of the phone options and do not have the Agent Desktop Helper Application installed on your computer (or the corresponding Chrome extension if you are using Chrome as your browser). See section [Installing/Updating Agent Desktop Helper Application](#) for more information.

**Note:** Your attempts to install/update Agent Desktop Helper Application may be blocked by your browser (depending on its security settings) and/or some anti-virus software running on your computer. Typically in this case you will see a warning message asking you to either cancel or confirm the download/install. Choose the confirm/allow/proceed option to proceed with the installation/upgrade. If in doubt, contact your system administrator.

You can check if the component is installed on your computer by looking up its name in the list of installed programs *(Windows Start Menu > Control Panel > Programs and Features)*. For the Chrome browser, you should also check whether the corresponding [Agent Desktop Chrome Extension](#) is installed and enabled in your Chrome browser *(Chrome > More tools... > Extensions)*.

If the above components are installed and enabled, the next step will be to restart the Agent Desktop Helper Application:

- Log out of the Agent Desktop.
- Close the browser.
- Close all other tabs and windows of all other browsers.
- Open the browser that you normally use to run your Agent Desktop.
- Log into the Agent Desktop normally.
- Restore all other browsers’ windows and tabs as needed.

If you are using the [Dial-in and keep line open](#) option for your phone, redial the designated number.

**Note:** Depending on the type of your connection, this message may appear for a moment when you log in. This is normal. Your Agent Desktop will be fully functional as soon as this message disappears.

**Speakers are not recognized.**

Make sure that your headset is properly connected to the computer.

**The user is already logged in. Force log in?**

This message usually indicates that you are already logged into the system on another computer.

Click Ok to close the “remote” login session. You will be logged on to the system from your current computer. The “remote” session will be closed with the following notification: *This session was logged out automatically because you just logged in somewhere else.*
This session was logged out automatically because you just logged in somewhere else.

See the description of message *The user is already logged in. Force log in?* in this errors list.

You are in the [No answer] state because you did not accept a customer interaction at [HH:MM]. Select the Ready state when ready to handle customer interactions.

If you do not accept an incoming service call, chat, or email within a certain amount of time, the system will return the interaction to the queue and change your state to Not Ready with the “No answer” reason. (Note that because Not Ready reason names are customizable you may see something other than “No answer” in the message text.) This is done to prevent other interactions from being distributed to you in case you accidentally leave your desk without making yourself Not Ready manually.

You can manually make yourself Ready when you are ready to handle interactions again.

You are in the [Connection loss] state because at [HH:MM] a call to this phone was not delivered due to network, firewall, or computer configuration issues. Please ensure this phone can accept calls before switching into the Ready state.

If a call cannot be delivered to you due to problems with your network connection, firewall, or computer configuration, the system will return the interaction to the queue and change your state to Not Ready with the “Connection loss” reason. (Note that because Not Ready reason names are customizable you may see something other than “Connection loss” in the message text.) This is done to prevent other interactions from being distributed to you while the problem persists.

Report this message to your system administrator. When the problem is resolved, you can manually make yourself Ready.

You have been logged out by [Name] at [HH:MM].

This message indicates that you have been manually logged out of the system by your supervisor. Contact your supervisor about the possible reasons.

Your platform is not supported by softphone plugin.

This message indicates one of the following:
• The type or version of your computer's operating system is not compatible with the Agent Desktop Helper Application.
• The type or version of the browser you are using to open Agent Desktop is not compatible with the Agent Desktop Helper Application.

For Macintosh computers only, this message may also indicate that support of Macintosh is disabled in the system.

You can either try to login from another computer or contact your system administrator for help.