

5.2 Initial General Configuration

Bright Pattern Documentation

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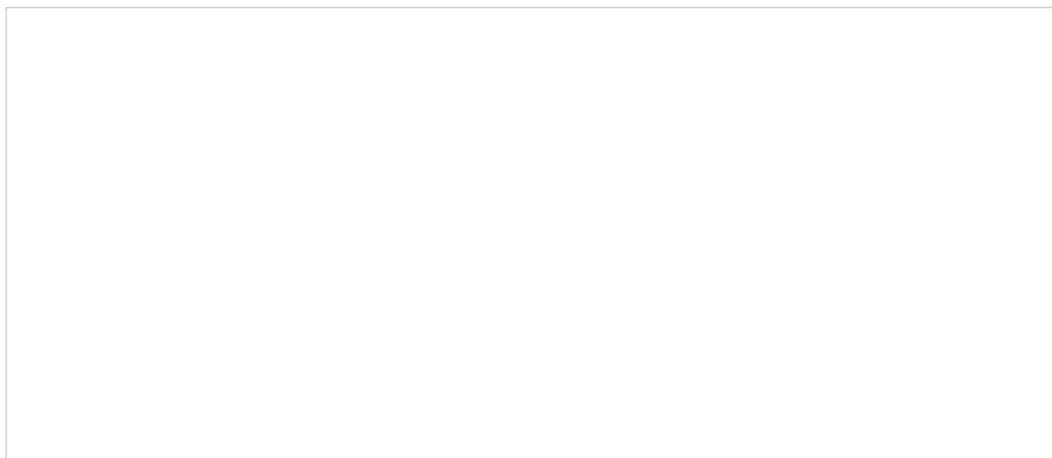
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Login Procedure

Contact Center Administrator is the web application that is used for configuring all contact center resources, defining interaction processing logic for inbound call distribution and outbound campaigns, and for all reporting and quality monitoring tasks. This application is supported on the current versions of the following browser applications: Internet Explorer, Chrome, Firefox, and Safari.

To begin a working session with *Contact Center Administrator*, in the address field of your browser, specify the URL provided by your system administrator. In the login dialog box that appears, enter your username and password.



Login screen

For your initial login, use the username and password provided to you by the administrator who created your user account. Depending on the policies of your organization, you may have to change this password upon a successful initial login. For password change instructions, see section [Application Settings](#).

Note: If the contact center functionality is provided to you as a service, you may also have to enter the tenant access domain name in the **Tenant** field when you log in for the first time. This name is assigned to your contact center at the service provider level. Upon a successful initial login, this name will be remembered by your browser application and be used for all subsequent login attempts.

If you forgot your password, click **Forgot Password?** in the login dialog box. In the **Password reset** dialog box that appears, specify either your email address or your user name and the tenant access domain name if applicable, and click **Proceed**. An email with password reset instructions will be sent to your email address.

Application Settings

To manage the settings of your instance of the Contact Center Administrator application, click **Settings** in the upper bar menu. The dialog box that appears provides access to the following settings: *Time zone*, *Locale*, and *Change password*.



Application settings

Time zone

Use this option to specify your default time zone. Note that this time zone setting will be applied only to your personal data requests such as time-based selection of audit log records. A different time zone setting is used for the configuration of time-based parameters of contact center resources, such as service hours. For more information, see section [General Settings](#).

Locale

Use this option to select one of the available languages. Note that this setting will only affect the text of the application itself and will have no effect on the language you use for the actual configuration data that you enter and edit.

Change password

This option lets you change your password. You will need to enter your current password in the dialog box that appears, enter the new password, and then confirm the new password by entering it again.

Any changes to the *Time zone* or *Change password* settings will take effect as soon as you click **OK** and refresh/reload the application web page. A new password will take effect the next time you log in.

Users

A user is anyone who may need access to any functionality of Bright Pattern Contact Center. Each user in the Bright Pattern Contact Center configuration must be assigned to a [team](#). The level of users' access to the system's functions is defined by their assigned [roles](#). Thus, you should typically have both the roles and teams defined in your configuration before you begin to register your users.

Most of the users will access Bright Pattern Contact Center via the Agent Desktop application. The exact set of functionality available to a logged-on user via this application depends on the [role\(s\)](#) assigned this user in your contact center configuration.

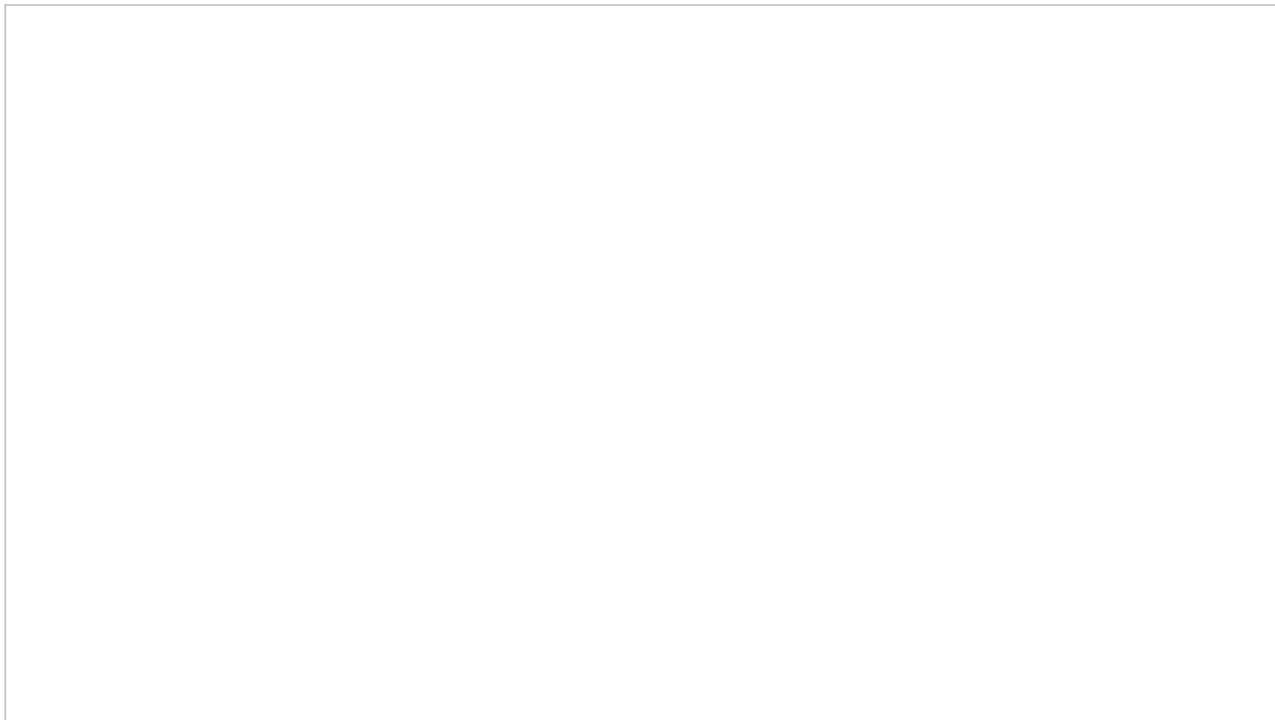
- The [Agent Guide](#) provides detailed instructions for the use of Agent Desktop by contact center agents and back-office (PBX) workers.
- The [Supervisor Guide](#) provides detailed instructions for the use of Agent Desktop by contact center supervisors and campaign operators.

Note that, while most of the Agent Desktop functionality is implemented using thin-client technologies, some of its capabilities require a software component that is installed on users' computers. This component is called Agent Desktop Helper Application. For more information about the functions of this component and methods of its installation, see section [Agent Desktop Helper Application](#).

Note also that the computers of users of the Agent Desktop application must conform to a number of [system requirements](#).

How to Define and Edit User Information

To view, define, and edit user information, select the **Users** option from the *Users & Teams* menu.



The Users list provides the following information:

- **First Name** - The first name of the user
- **Last Name** - The last name of the user
- **Extension** - The extension number of the user
- **Roles** - The assigned role(s) for the user (e.g., agent, supervisor, etc.)
- **Team** - The assigned team(s) for the user
- **Created on** - The date that the user was created in the system
- **Last login on** - The date of the user's last login to the system

You can import user information from an Excel spreadsheet instead of entering it manually. You can also export user information to an Excel spreadsheet. Import and export operations are activated by the arrow buttons at the bottom of the user list view. For information about the spreadsheet format, click the **import** button. An easy way to obtain a user import template is to add a few users manually first, apply the export operation, and use the produced spreadsheet as an import template.

Note: If you do not wish to use certain records during a particular instance of import, but you would like to keep those records in the spreadsheet for possible use in the future, you can add a column with name *Delete* to the spreadsheet and set its value to *yes* for the records that are not to be imported.

Screen Properties

Users tab

The **Users** screen properties are described as follows. Note that users can change some of their profile properties directly via the Agent Desktop application. These properties are marked with an asterisk (*). For more information, see section [Configuring Your User Profile](#) of the *Agent Guide*.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making a change to user information that appears in the user's profile, we recommend that all affected agents re-login to Agent Desktop and/or refresh their browser page.



Users > Person tab

Username

Username is the name that the user will enter when logging into Agent Desktop or any other Bright Pattern application. Mandatory and must be unique within the contact center.

Password

Password is the password that the user will enter when logging into Agent Desktop or any other Bright Pattern application. This field is displayed for new users only and its specification is mandatory. Note that some rules related to password complexity (i.e., length, special characters, etc.) may be defined and enforced at the service provider level.

Confirm password

The *Confirm password* field is mandatory.

Change password

The *Change password* option is displayed for existing users only, and it is used to change the selected user's password. This option will typically be used by an administrator to change the passwords of other users. Users can change their own passwords via the Agent Desktop application.

API secret

The *API secret* is a unique, secret string that identifies the user (i.e., user credentials). The API secret is used during authentication to request an access token for Bright Pattern APIs, such as the [Tenant Management API](#), the [User Management API](#), and others.

Disabled

Disabled indicates whether the user is active. Select this checkbox to disable user's access to all system functions temporarily. Disabled users are shown dimmed in the user list view.

Note that inactive user accounts may also be disabled automatically. See section [Security Policy](#) for more information. Disabled users are still counted as named users in your configuration.

User must change password on next login

This property indicates whether the user will be forced to change the password upon the next login. To comply with the PCI DSS security standard, select this checkbox for every new user.

As soon as the user changes the password, the check mark will be removed automatically. You can force the user to change password at any time by selecting this checkbox again.

This property exists to support manual password change enforcement. Note that the system also supports automatic password expiration. See section [Security Policy](#) for more information. The related automatic password changes are not reflected by this property.

Lockout

Lockout indicates whether this user can access the system or is currently locked out due to a security policy violation. See section [Security Policy](#) for more information. You can click the link to view current lockout status. If the user account is locked out, you can unlock it by clicking the **Unlock** button.

First name

First name is the user's first name. This field is mandatory.

Last name

Last name is the user's last name. This field is mandatory.

Team

Team is the team to which this user is assigned. A Bright Pattern Contact Center user must be assigned to a team, and a user cannot be assigned to more than one team. See section [Teams](#) for considerations regarding assignment of users to teams.

Note that teams may be associated with services. Upon assignment to such a team, the user may get a corresponding service skill with a certain level automatically. You can change the level or remove the skill from the user manually using the [Skill Levels](#) option.

Record calls

The *Record calls* checkbox allow you to record a specific agent's calls. Note: If [call recording](#) is enabled as a global setting, this checkbox option will change to **Do not record calls** and you can mark specific agents to not record.

Title

Title is the user's job title. This property is used for information only. For user's access privileges, see section [Roles](#) below.

About me

About me is the optional information that users will typically enter themselves via their [Agent Desktop profile settings](#).

Photo

This is the user's photo. The photo will appear in the [Contact Info Panel](#) of the Agent Desktop application during internal communications. If you use chat services, the photo can also be displayed to customers when they communicate with this agent via chat. To upload a photo, click **upload**. To remove the photo, click **remove**.

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 service provider.

Contacts tab



Users > Contacts tab

Chat nickname

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

Rank

Rank is the user's rank. This optional setting can be used as an additional selection criterion in custom agent reports. This setting is essential for users who are agents only.

Phone extension

Phone extension is the extension number of the user's [softphone](#). This mandatory setting must contain numeric characters only and must be unique within the contact center. Note that if you have any hardphones registered in the system, their numbers cannot be assigned as users' phone extensions. See section [Hardphones](#) for more information.

The extension can be used in combination with a user's *PIN code for phone login* (see below) for authentication through interfaces that only accept numeric input (e.g., an IVR system).

Bright Pattern Contact Center assigns extension numbers to new users automatically in ascending order starting from 1000. You can change the default number to any other value. In this case, the default extension number assigned to the next new user will be the newly defined value + 1. Extension numbers are recycled (i.e., when you delete a user, that user's extension number will be assigned by default to the next new user).

A user's extension number cannot be changed while the user is logged on to that extension (in this case it will be displayed as read-only). Also note that the user can log in with a different number (e.g., a hardphone number).

For more information about user phone device options, see section [Selecting a Phone Device](#) of the *Agent Guide*.

Forward all calls for ext...

This indicates whether call forwarding is activated for the user's *phone extension*.

Call forwarding can also be activated via the extension's properties; see section [Softphones](#). Section [Forwarding and Voicemail Operation](#) explains how forwarding will work with various [phone devices](#) that the user can select upon login.

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

to

This 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 the user is logged on and does 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 the user is unreachable (busy or logged out), incoming calls will be forwarded to the specified number immediately, regardless of this setting.

Default hardphone number

Default hardphone number is the extension number of the hardphone assigned to the user. This setting is optional but if specified, it must be one of the existing hardphone extension numbers (see section [Hardphones](#)). This parameter should be defined only for users who normally use permanently assigned hardphones installed at their personal desks. To log into the Agent Desktop application with this hardphone, the user should select option **Default phone**. For more information about a user's phone device options, see section [How to Select a Phone Device](#) of the *Agent Guide*.

The call forwarding settings will not take effect on the default hardphone. Instead, the forwarding settings configured for the hardphone itself will apply (see section [Hardphones](#)).

Enable voicemail

Enable voicemail indicates whether the voicemail function is enabled for the user. For general voicemail settings, see section [Voicemail](#).

Section [Forwarding and Voicemail Operation](#) explains how voicemail will work with various [phone devices](#) that the user can select upon login.

Note that call forwarding takes priority over voicemail. The voicemail function cannot be enabled if the user already has call forwarding activated. If the user has had voicemail enabled, a temporary activation of call forwarding for this user 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 the user is logged on and does not pick up the call. The amount of time must be specified if the *Enable voicemail* checkbox is selected.

If the user is unreachable (busy or logged out), incoming calls will be sent to the user's voicemail immediately, regardless of this setting.

Use this voicemail greeting

This option lets you upload up to three different personal voicemail greetings for the user and select which one should be used.

Users can also record their personal greetings directly via their Agent Desktop application. For more information see section [Configuring Your Voicemail](#) of the *Agent Guide*.

Work phone

Work phone is the user's work phone. This optional setting is used for informational purposes only.

Mobile phone

Mobile phone is the user's mobile phone number. This optional setting is used for informational purposes only.

PIN code for phone login

The PIN is the user's numeric password that can be used in combination with user's *Phone extension* for authentication through interfaces that accept only numeric input (e.g., an interactive voice response (IVR) system).

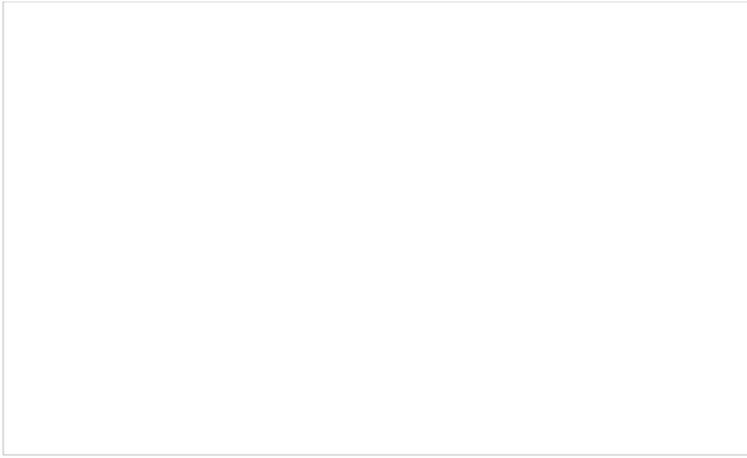
Email address

Email address is the user's email address that the system will use for delivery of password reset instructions, voicemail messages, and scheduled reports. It must be specified if the voicemail is enabled because the user will be notified of new voicemail messages via email.

Note that this email address is not used for distribution of service email interactions to the agents.

Location tab

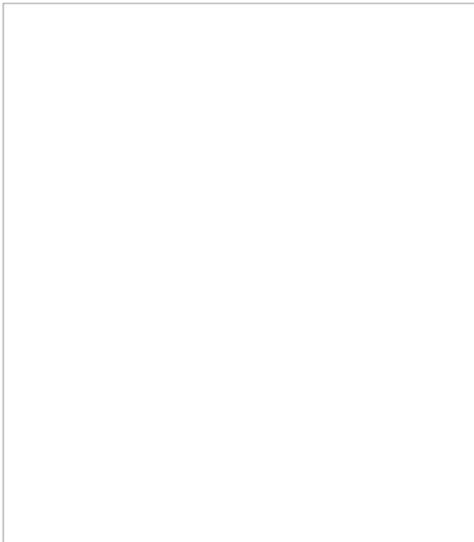
This tab lets you specify various optional properties related to a user's geographical location.



Users > Location tab

Roles tab

A user can be assigned any number of roles that define what kind of system functionality can be accessed. For more information, see section [Roles](#). Select a role from the list in order to assign it to the user.



Users > Roles tab

By default, new users do not have any roles assigned to them. Since the majority of users registered in your configuration are likely to be agents, you can configure automatic assignment of the *Agent* role to every new user. See the description of property *Assign this role to newly created users* in section [Roles](#) for more information.

Roles

A role is a combination of privileges (i.e., permissions) that allow a user to access specific functionality within Bright Pattern Contact Center. Roles, therefore, define the type of work that users are allowed to do in the contact center. For example, in order to design call distribution scenarios, a user must have a role that has the *Manage Scenarios* privilege. A user may have any number of roles assigned simultaneously.



Users & Teams > Roles

Bright Pattern Contact Center provides a number of preconfigured roles that are available upon the initial solution installation. It is recommended that you review these roles first to see if they sufficiently reflect your contact center organization. If any changes are desired, you can modify the default privilege set of any preconfigured role, delete some of the preconfigured roles, and/or create some additional roles.

To work with roles, select the **Roles** option from the *Users & Teams* menu.

Screen Properties

Roles

The *Roles* screen properties are described as follows.

Name

Name is the role name. This name must be unique within the contact center.

Licenses

This property is reserved for future use.

Assign this role to newly created users

Assign this role to newly created users indicates whether the given role will be assigned automatically to every new user registered in your configuration. For example, if you want all or most of your users to be able to handle service interactions, you can select this property for the default role *Agent* and all new users automatically will get the corresponding permission. Remember that you can always remove a role assigned by default manually.

Privileges

This tab defines the privileges granted with this role. A privilege is permission to access specific functionality within Bright Pattern Contact Center.



Roles > Privileges

Note that there are two columns:

- **Has** defines whether users who have this privilege can access the corresponding functions.
- **May grant or revoke** defines whether users can assign roles containing such privileges to other users or to revoke them from other users.

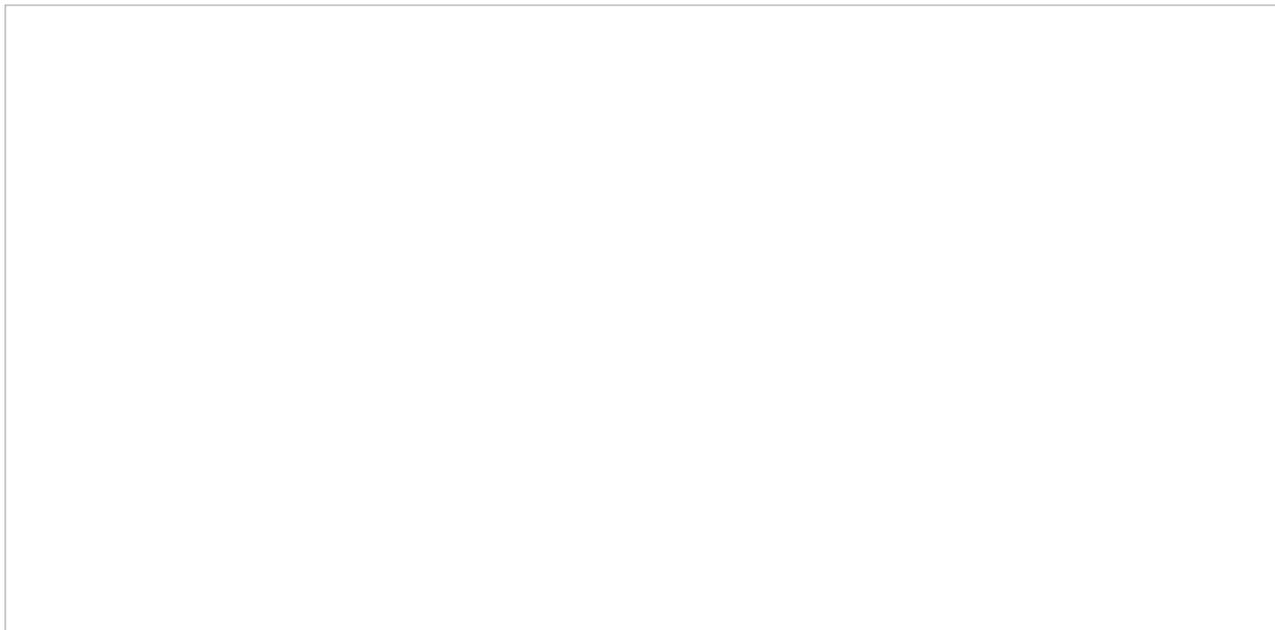
For detailed descriptions of all privileges, see section [Privileges](#). Note that access to some functions may require a combination of privileges.

Note: The **BPO Client** group of privileges exists to support BPO call center operations, where BPO clients may want to have access to some system functions, such as quality monitoring. This access will be limited to the services that the BPO contact center handles for the given client. Any privilege in this group will be provided only with respect to the services where the corresponding user is assigned as a *reviewer*. For more information, see section [Services and Campaigns - Assignment Tab](#). If you assign a certain role to new users by default (see setting *Assign this role to newly created users*), you may have to remove that role explicitly from your BPO clients to prevent them from using system functions other than the ones implied by their BPO client role.

Users tab

The *List of users* shows all the users who currently have the selected role assigned to them. First name, last name, extension number, and team membership are displayed for each user. Double click a specific user row to manage [settings](#) of this user.

To assign the selected role to multiple users, click the **Assign users** button.



Roles > Users tab screen properties

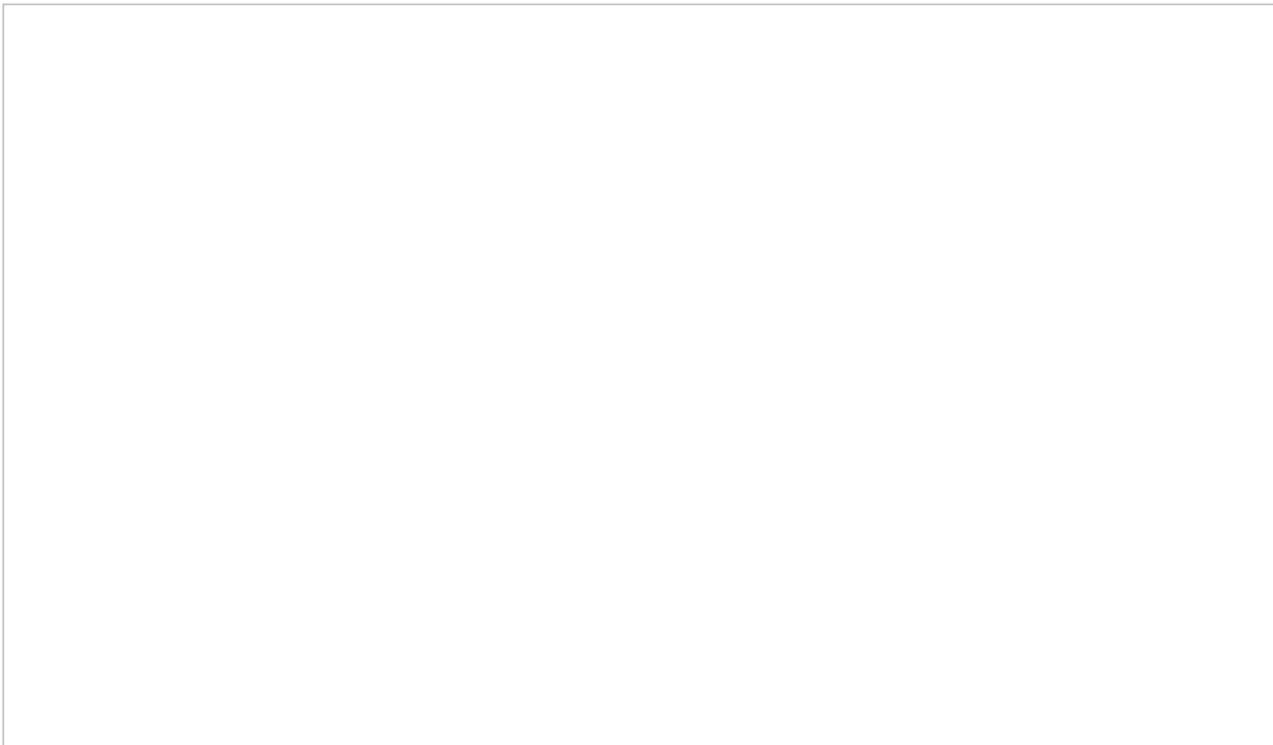
Teams

Teams typically reflect the organization of your contact center. Agent teams, for example, are organized for convenient real-time management so that when a supervisor logs into his or her desktop application, the supervisor will see only the agents of the team that the supervisor is assigned to manage. Agent teams will also appear in historical reports for team-level performance evaluation. Note that team membership of agents may not have any direct effect on the distribution of specific service interactions to them.

Teams for other contact center personnel are set up for organizational purposes only. For example, you can have teams that reflect main functions of contact center management (e.g., campaign operators, scenario designers, workforce managers). Upon initial solution setup, the default team Administrators is created automatically. You can use this team to register initially all non-agent personnel who need access to the system. Note that team membership of non-agents does not have any effect on their ability to access specific contact center resources and functions. Such ability is defined by roles assigned at the individual user level. (See section [Roles](#) for more information.)

Note: Supervisors are assigned at the team level. You may add a supervisor to a team from the *Properties tab > Supervisors* (see the screen properties below).

To set up and edit teams, select the *Teams* option from the *Users & Teams* menu.



Users & Teams > Teams

Organization

Teams are organized into four tabs shown at the top of your screen: Properties, Members, Services, and Dashboard. Click each tab to view and edit specific fields.

Properties Tab



Teams > Properties screen properties

Name

The *Name* is the team name. This field is mandatory, and the name must be unique within the contact center.

Supervisors

Supervisors who are assigned to manage this team may be optionally added. To add a supervisor, click **edit** and select one or more supervisors from the list of users that have the supervisor role. This setting, while optional, is essential for agent teams only. Supervisors assigned to a team will be able to monitor activities of all agents in that team in real time via their desktop applications. Supervisors themselves may or may not be members of the teams that they are assigned to supervise. The system does not impose any restrictions on how many teams one supervisor can be assigned to manage.

Exit After Call Work

Exit After Call Work allows you to set the maximum time in the [After-call Work state](#) for the agents of this team. This setting is optional and is essential for agent teams only.

A pull-down menu displays three options:

- Select **system-wide setting** to use the [timeout defined at the contact center level](#)
- Select **manually** to allow the agents of this team to remain in the After-call Work state until they exit this state manually
- Select **automatically, after** to set the desired timeout in seconds.

Enter After Call Break

Enter After Call Break enables you to specify whether the agents of this team will be allowed to have any rest time when they finish handling a service call (including After-call Work, if it is defined). This setting is optional and essential for agent teams only.

A pull-down menu displays three options:

- Select **system-wide setting** to use the [contact-center-level setting](#)
- Select **enter Break state** to enable the rest time
- Select **do not enter Break state** to make agents automatically ready for next call as soon as they finish handling of current service calls. If you click **do not enter Break state** to the right of the pull-down menu, you will be directed to the General Settings page for configuring your break settings. If you do not wish to change those settings, go back by clicking *Teams* on the main menu on the left-hand side of the screen.

Exit After Call Break

Exit After Call Break is where you set the maximum time in the Break state after finishing a service call for the agents of this team. This setting is optional and is essential for agent teams only.

A pull-down menu displays three options:

- Select **system-wide setting** to use the [timeout defined at the contact center level](#)
- Select **manually** to allow the agents of this team to remain in the Break state until they exit this state manually
- Select **automatically, after** to set the desired timeout (in seconds).

If you click **manually** to the right of the pull-down menu, you will be directed to the General Settings page for configuring your break settings. If you do not wish to change those settings, go back by clicking *Teams* on the main menu on the left-hand side of the screen.

Non-call cases URL

Non-call cases URL is the web page URL that will be displayed for agents upon delivery of a service interaction (unless another URL is provided via the [Web Screenpop block](#) of the applied scenario or via the [settings of the corresponding campaign](#)).

A pull-down menu displays three options:

- Select **system-wide setting** to display the [web page defined at the contact center level](#)
- Select **none** to display no web pages
- Select **custom** to set a web page specific to the agents of this team.

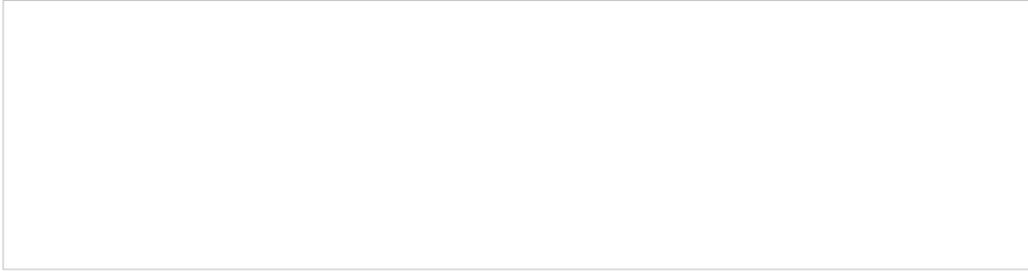
If you click **empty** to the right of the pull-down menu, you will be directed to the General Settings page for configuring your break settings. If you do not wish to change those settings, go back by clicking *Teams* on the main menu on the left-hand side of the screen.

Directory Static Entries

[Static entries](#) describe names and contacts of people/organizations that are external to your contact center. These entries appear in the [directory](#) of the Agent Desktop application. For your convenience, related static entries are arranged in folders.

By default, agents will be able to see **All** directory folders. To select specific folders that the agents of this team will be able to see, click **Selected**, click **edit**, and select the folders in the dialog window that appears. Highlight the desired folders and click the arrow buttons to select or remove them; then hit OK.

Members tab



Teams > Members tab screen properties

Members List

The *Members List* shows all the members (i.e., users) who are currently assigned to this team. Each team member is listed with the following information displayed: first name, last name, extension number, and assigned [roles](#).

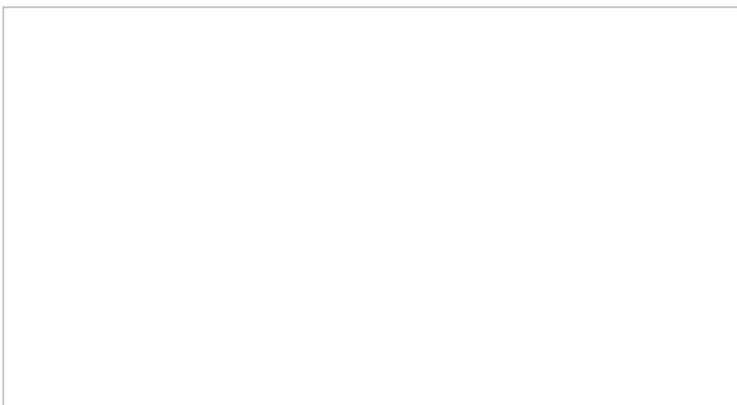
Move to another team

Located at the bottom of the window, the *Move to another team* button allows you to move selected members (users) to a different team. Select one or more members from the list, and then click the button. In the dialog box that pops up, select the team in which your selected member (user) will be placed. Click **OK**.

Change roles

Located at the bottom of the window, the *Change roles* button control allows you to assign or remove the [roles](#) of the selected user(s). Select one or more users from the list, click **Change roles**, and select the new role(s) as appropriate. Click **OK**.

Services tab



Teams > Services tab properties

Services and campaigns provided by this team

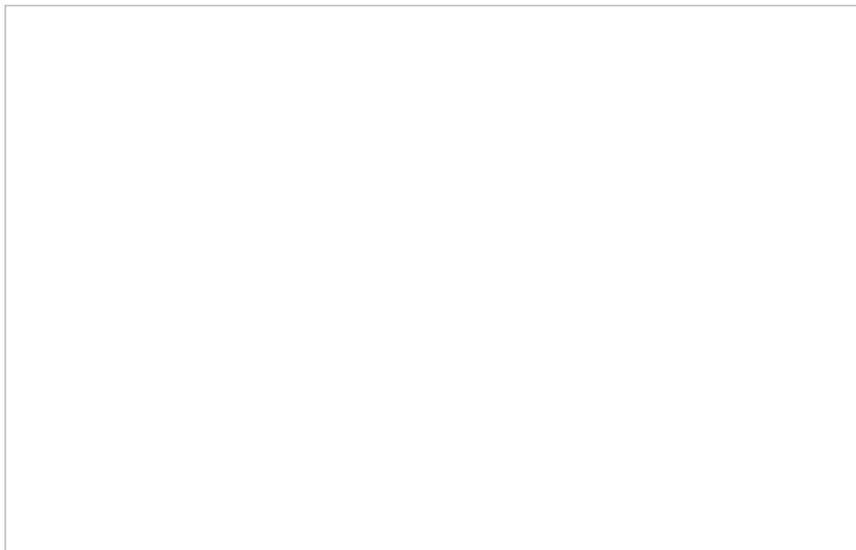
This setting allows you to designate the services that are provided by the agents of this team. This setting is essential for agent teams only. When you assign a service to an agent team, you have the option to assign the default service skill to all members this team with a specific level. If you select this option, all current and future members of the team will get this service skill automatically. Individual levels can be changed manually later. In addition, when you assign a service to a team, supervisors of that team will be able to monitor this service in real time via their desktop applications. For more information, see section [Skill Levels](#).

Click *edit* to assign one or more of the available services to this team and/or to remove previously assigned services. Note that when you remove a service from a team, the associated default service skill will be removed from all members of this team. In the dialog box that pops up, select from the *Available services* on the left and use the arrow controls to move them to *Selected services* on the right. To unassign services from the team, select from the *Selected services* on the right and use the arrow controls to move them to the *Available services* on the left.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making a change to the list of assigned services, we recommend that all affected logged-in agents refresh their browser page.

Dashboard tab

The **Dashboard tab** contains properties that let you configure the content and appearance of metrics for the agents of the given team.



Teams > Dashboard screen properties

General information

The Agent Desktop application shows agents [real-time metrics](#) related to their personal performance, as well as the performance of their teams and services that they deliver. For more information, see section [Dashboard](#) of the *Agent Guide*.

Rotation rate

If an agent handles interactions for several different services/campaigns, metrics related to those services will be displayed for one service at a time. The dashboard will automatically rotate displayed services. *Rotation rate* defines the frequency with which such rotation will take place. From the pull-down menu, select from the following rates (in seconds): **none**, **5 sec**, **10 sec**, **15 sec**, or **20 sec**.

Metrics

Metrics are the data that will be displayed for members of the given team. To add a metric, click **add** and select the desired metric from the drop-down *Metric* menu. For descriptions of the available metrics, see section [Agent Dashboard Metrics](#).

To help with self-evaluation, current values of an agent personal metrics can be provided with the agent's current ranking within the team (checkbox **Show team ranking**), and performance of the closest other agent in ranking (checkbox **Show next value**).

Newly created dashboard metrics will appear at the end of the list. To change the position of a metric in the dashboard, drag it to the desired new location. To edit or remove an existing metric, hover your cursor over it and select the desired function.

Label

The *Label* is the metric name as it will be displayed in the Agent Desktop. Due to the limited space allocated for the metrics on the desktop, metric names should be displayed in an abbreviated form.

Show team ranking

Show team ranking is available for personal agents' metrics only. Select this option if you want the agent's metric value to be accompanied with his current ranking within the team according to this metric. This can help agents with self-evaluation of their performance.

Show next value

Show next value is available for personal agents' metrics only. Select this option if you want the agent's metric value to be accompanied with the value of the same metric for the agent who is directly ahead of this one in the current ranking. (If the agent currently has the top ranking, the value of the next best agent will be displayed.)

Excluded services and campaigns

By default, the metrics you configure will be displayed for all services and campaigns assigned to the given team. If you do not want certain services to be displayed, click **add** and select the services that should be excluded.

Preview

Preview shows you how the dashboard that you have configured will be displayed in the Agent Desktop application.

Note that due to a limited space allocated for the metrics on Agent Desktop, if the given team provides multiple services, metrics related to those services will be displayed for one service at a time.

To see what the dashboard will look like for a specific service, select the desired service from the list. (The difference in the dashboard appearance for different services may be due to service-specific [disposition metrics](#).)

Users

A user is anyone who may need access to any functionality of Bright Pattern Contact Center. Each user in the Bright Pattern Contact Center configuration must be assigned to a [team](#). The level of users' access to the system's functions is defined by their assigned [roles](#). Thus, you should typically have both the roles and teams defined in your configuration before you begin to register your users.

Most of the users will access Bright Pattern Contact Center via the Agent Desktop application. The exact set of functionality available to a logged-on user via this application depends on the [role\(s\)](#) assigned this user in your contact center configuration.

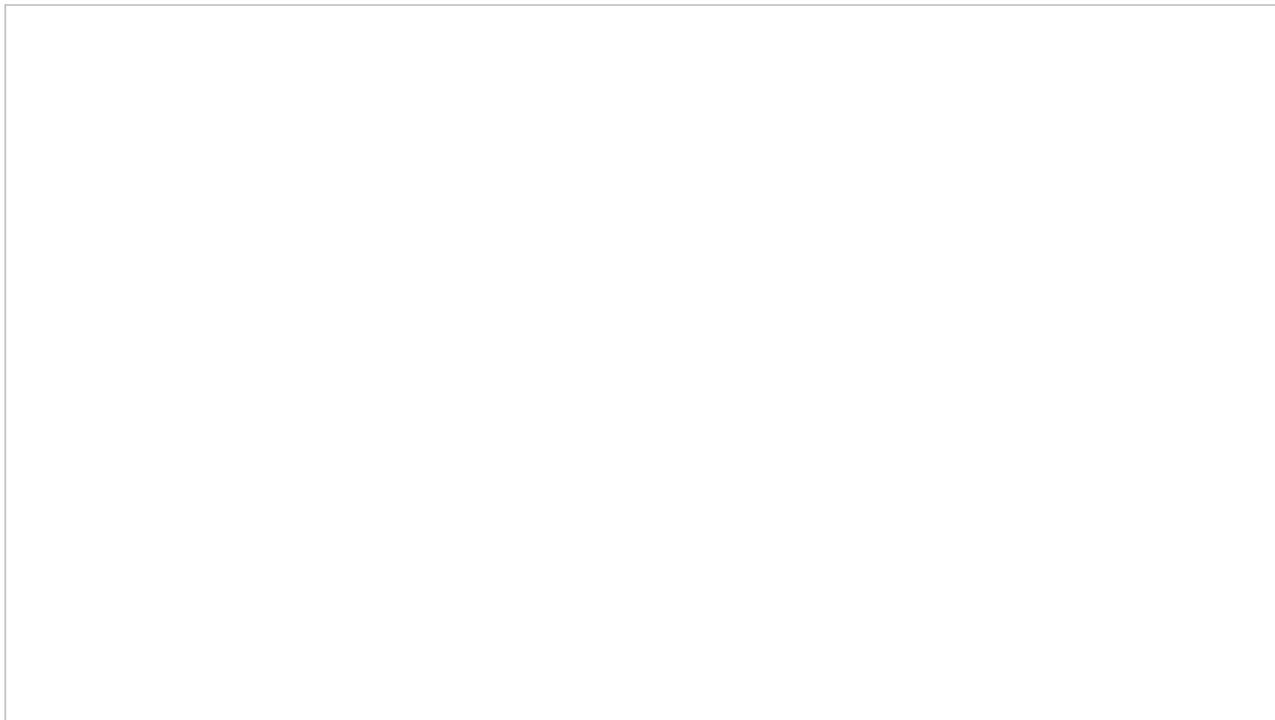
- The [Agent Guide](#) provides detailed instructions for the use of Agent Desktop by contact center agents and back-office (PBX) workers.
- The [Supervisor Guide](#) provides detailed instructions for the use of Agent Desktop by contact center supervisors and campaign operators.

Note that, while most of the Agent Desktop functionality is implemented using thin-client technologies, some of its capabilities require a software component that is installed on users' computers. This component is called Agent Desktop Helper Application. For more information about the functions of this component and methods of its installation, see section [Agent Desktop Helper Application](#).

Note also that the computers of users of the Agent Desktop application must conform to a number of [system requirements](#).

How to Define and Edit User Information

To view, define, and edit user information, select the **Users** option from the *Users & Teams* menu.



The Users list provides the following information:

- **First Name** - The first name of the user
- **Last Name** - The last name of the user
- **Extension** - The extension number of the user
- **Roles** - The assigned role(s) for the user (e.g., agent, supervisor, etc.)
- **Team** - The assigned team(s) for the user
- **Created on** - The date that the user was created in the system
- **Last login on** - The date of the user's last login to the system

You can import user information from an Excel spreadsheet instead of entering it manually. You can also export user information to an Excel spreadsheet. Import and export operations are activated by the arrow buttons at the bottom of the user list view. For information about the spreadsheet format, click the **import** button. An easy way to obtain a user import template is to add a few users manually first, apply the export operation, and use the produced spreadsheet as an import template.

Note: If you do not wish to use certain records during a particular instance of import, but you would like to keep those records in the spreadsheet for possible use in the future, you can add a column with name *Delete* to the spreadsheet and set its value to *yes* for the records that are not to be imported.

Screen Properties

Users tab

The **Users** screen properties are described as follows. Note that users can change some of their profile properties directly via the Agent Desktop application. These properties are marked with an asterisk (*). For more information, see section [Configuring Your User Profile](#) of the *Agent Guide*.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making a change to user information that appears in the user's profile, we recommend that all affected agents re-login to Agent Desktop and/or refresh their browser page.



Users > Person tab

Username

Username is the name that the user will enter when logging into Agent Desktop or any other Bright Pattern application. Mandatory and must be unique within the contact center.

Password

Password is the password that the user will enter when logging into Agent Desktop or any other Bright Pattern application. This field is displayed for new users only and its specification is mandatory. Note that some rules related to password complexity (i.e., length, special characters, etc.) may be defined and enforced at the service provider level.

Confirm password

The *Confirm password* field is mandatory.

Change password

The *Change password* option is displayed for existing users only, and it is used to change the selected user's password. This option will typically be used by an administrator to change the passwords of other users. Users can change their own passwords via the Agent Desktop application.

API secret

The *API secret* is a unique, secret string that identifies the user (i.e., user credentials). The API secret is used during authentication to request an access token for Bright Pattern APIs, such as the [Tenant Management API](#), the [User Management API](#), and others.

Disabled

Disabled indicates whether the user is active. Select this checkbox to disable user's access to all system functions temporarily. Disabled users are shown dimmed in the user list view.

Note that inactive user accounts may also be disabled automatically. See section [Security Policy](#) for more information. Disabled users are still counted as named users in your configuration.

User must change password on next login

This property indicates whether the user will be forced to change the password upon the next login. To comply with the PCI DSS security standard, select this checkbox for every new user.

As soon as the user changes the password, the check mark will be removed automatically. You can force the user to change password at any time by selecting this checkbox again.

This property exists to support manual password change enforcement. Note that the system also supports automatic password expiration. See section [Security Policy](#) for more information. The related automatic password changes are not reflected by this property.

Lockout

Lockout indicates whether this user can access the system or is currently locked out due to a security policy violation. See section [Security Policy](#) for more information. You can click the link to view current lockout status. If the user account is locked out, you can unlock it by clicking the **Unlock** button.

First name

First name is the user's first name. This field is mandatory.

Last name

Last name is the user's last name. This field is mandatory.

Team

Team is the team to which this user is assigned. A Bright Pattern Contact Center user must be assigned to a team, and a user cannot be assigned to more than one team. See section [Teams](#) for considerations regarding assignment of users to teams.

Note that teams may be associated with services. Upon assignment to such a team, the user may get a corresponding service skill with a certain level automatically. You can change the level or remove the skill from the user manually using the [Skill Levels](#) option.

Record calls

The *Record calls* checkbox allow you to record a specific agent's calls. Note: If [call recording](#) is enabled as a global setting, this checkbox option will change to **Do not record calls** and you can mark specific agents to not record.

Title

Title is the user's job title. This property is used for information only. For user's access privileges, see section [Roles](#) below.

About me

About me is the optional information that users will typically enter themselves via their [Agent Desktop profile settings](#).

Photo

This is the user's photo. The photo will appear in the [Contact Info Panel](#) of the Agent Desktop application during internal communications. If you use chat services, the photo can also be displayed to customers when they communicate with this agent via chat. To upload a photo, click **upload**. To remove the photo, click **remove**.

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 service provider.

Contacts tab



Users > Contacts tab

Chat nickname

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

Rank

Rank is the user's rank. This optional setting can be used as an additional selection criterion in custom agent reports. This setting is essential for users who are agents only.

Phone extension

Phone extension is the extension number of the user's [softphone](#). This mandatory setting must contain numeric characters only and must be unique within the contact center. Note that if you have any hardphones registered in the system, their numbers cannot be assigned as users' phone extensions. See section [Hardphones](#) for more information.

The extension can be used in combination with a user's *PIN code for phone login* (see below) for authentication through interfaces that only accept numeric input (e.g., an IVR system).

Bright Pattern Contact Center assigns extension numbers to new users automatically in ascending order starting from 1000. You can change the default number to any other value. In this case, the default extension number assigned to the next new user will be the newly defined value + 1. Extension numbers are recycled (i.e., when you delete a user, that user's extension number will be assigned by default to the next new user).

A user's extension number cannot be changed while the user is logged on to that extension (in this case it will be displayed as read-only). Also note that the user can log in with a different number (e.g., a hardphone number).

For more information about user phone device options, see section [Selecting a Phone Device](#) of the *Agent Guide*.

Forward all calls for ext...

This indicates whether call forwarding is activated for the user's *phone extension*.

Call forwarding can also be activated via the extension's properties; see section [Softphones](#). Section [Forwarding and Voicemail Operation](#) explains how forwarding will work with various [phone devices](#) that the user can select upon login.

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

to

This 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 the user is logged on and does 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 the user is unreachable (busy or logged out), incoming calls will be forwarded to the specified number immediately, regardless of this setting.

Default hardphone number

Default hardphone number is the extension number of the hardphone assigned to the user. This setting is optional but if specified, it must be one of the existing hardphone extension numbers (see section [Hardphones](#)). This parameter should be defined only for users who normally use permanently assigned hardphones installed at their personal desks. To log into the Agent Desktop application with this hardphone, the user should select option **Default phone**. For more information about a user's phone device options, see section [How to Select a Phone Device](#) of the *Agent Guide*.

The call forwarding settings will not take effect on the default hardphone. Instead, the forwarding settings configured for the hardphone itself will apply (see section [Hardphones](#)).

Enable voicemail

Enable voicemail indicates whether the voicemail function is enabled for the user. For general voicemail settings, see section [Voicemail](#).

Section [Forwarding and Voicemail Operation](#) explains how voicemail will work with various [phone devices](#) that the user can select upon login.

Note that call forwarding takes priority over voicemail. The voicemail function cannot be enabled if the user already has call forwarding activated. If the user has had voicemail enabled, a temporary activation of call forwarding for this user 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 the user is logged on and does not pick up the call. The amount of time must be specified if the *Enable voicemail* checkbox is selected.

If the user is unreachable (busy or logged out), incoming calls will be sent to the user's voicemail immediately, regardless of this setting.

Use this voicemail greeting

This option lets you upload up to three different personal voicemail greetings for the user and select which one should be used.

Users can also record their personal greetings directly via their Agent Desktop application. For more information see section [Configuring Your Voicemail](#) of the *Agent Guide*.

Work phone

Work phone is the user's work phone. This optional setting is used for informational purposes only.

Mobile phone

Mobile phone is the user's mobile phone number. This optional setting is used for informational purposes only.

PIN code for phone login

The PIN is the user's numeric password that can be used in combination with user's *Phone extension* for authentication through interfaces that accept only numeric input (e.g., an interactive voice response (IVR) system).

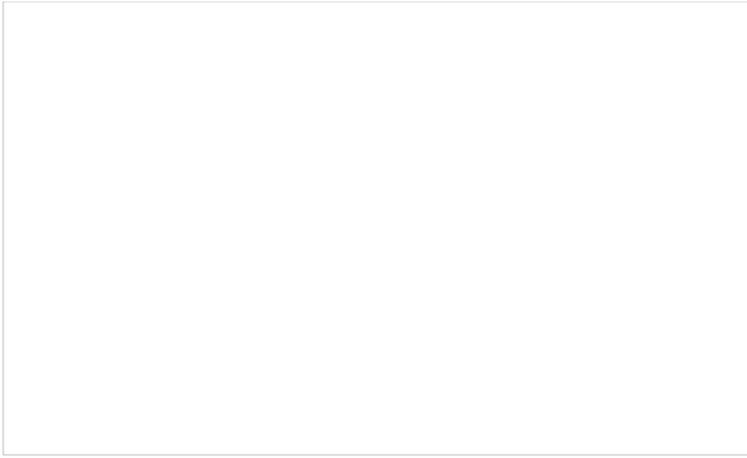
Email address

Email address is the user's email address that the system will use for delivery of password reset instructions, voicemail messages, and scheduled reports. It must be specified if the voicemail is enabled because the user will be notified of new voicemail messages via email.

Note that this email address is not used for distribution of service email interactions to the agents.

Location tab

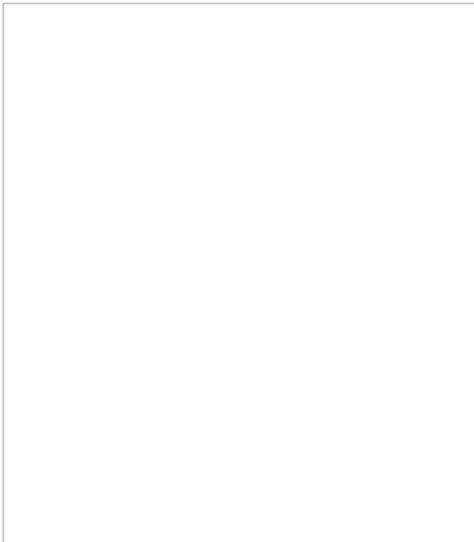
This tab lets you specify various optional properties related to a user's geographical location.



Users > Location tab

Roles tab

A user can be assigned any number of roles that define what kind of system functionality can be accessed. For more information, see section [Roles](#). Select a role from the list in order to assign it to the user.



Users > Roles tab

By default, new users do not have any roles assigned to them. Since the majority of users registered in your configuration are likely to be agents, you can configure automatic assignment of the *Agent* role to every new user. See the description of property *Assign this role to newly created users* in section [Roles](#) for more information.

Roles

A role is a combination of privileges (i.e., permissions) that allow a user to access specific functionality within Bright Pattern Contact Center. Roles, therefore, define the type of work that users are allowed to do in the contact center. For example, in order to design call distribution scenarios, a user must have a role that has the *Manage Scenarios* privilege. A user may have any number of roles assigned simultaneously.



Users & Teams > Roles

Bright Pattern Contact Center provides a number of preconfigured roles that are available upon the initial solution installation. It is recommended that you review these roles first to see if they sufficiently reflect your contact center organization. If any changes are desired, you can modify the default privilege set of any preconfigured role, delete some of the preconfigured roles, and/or create some additional roles.

To work with roles, select the **Roles** option from the *Users & Teams* menu.

Screen Properties

Roles

The *Roles* screen properties are described as follows.

Name

Name is the role name. This name must be unique within the contact center.

Licenses

This property is reserved for future use.

Assign this role to newly created users

Assign this role to newly created users indicates whether the given role will be assigned automatically to every new user registered in your configuration. For example, if you want all or most of your users to be able to handle service interactions, you can select this property for the default role *Agent* and all new users automatically will get the corresponding permission. Remember that you can always remove a role assigned by default manually.

Privileges

This tab defines the privileges granted with this role. A privilege is permission to access specific functionality within Bright Pattern Contact Center.



Roles > Privileges

Note that there are two columns:

- **Has** defines whether users who have this privilege can access the corresponding functions.
- **May grant or revoke** defines whether users can assign roles containing such privileges to other users or to revoke them from other users.

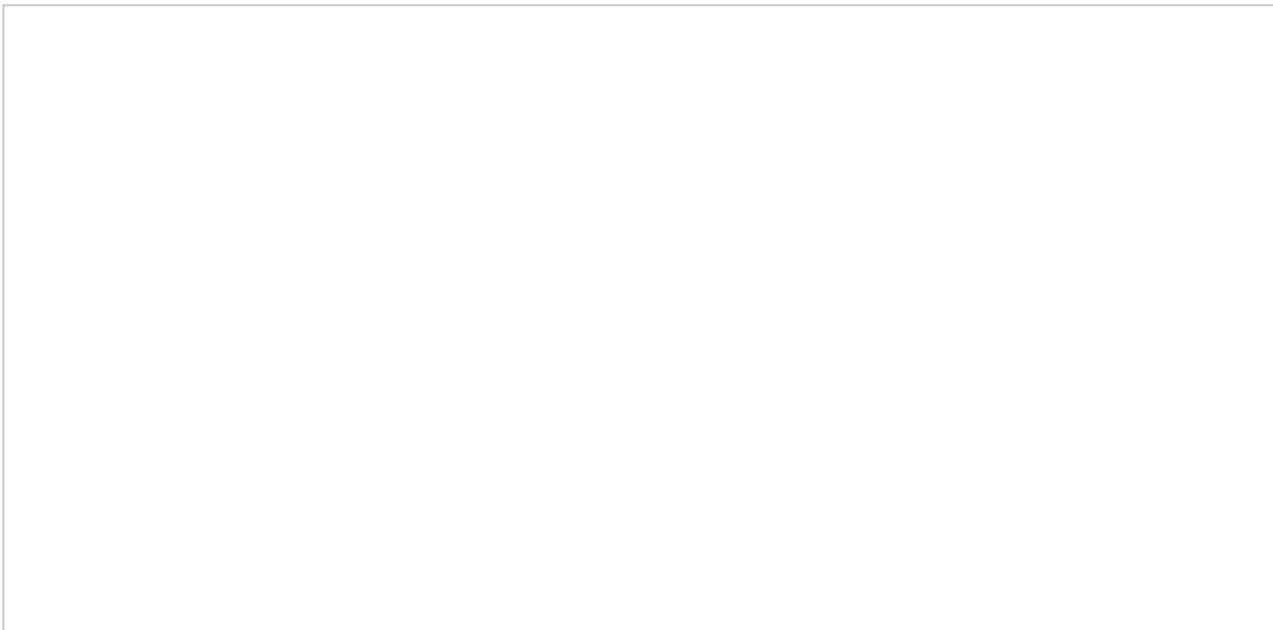
For detailed descriptions of all privileges, see section [Privileges](#). Note that access to some functions may require a combination of privileges.

Note: The **BPO Client** group of privileges exists to support BPO call center operations, where BPO clients may want to have access to some system functions, such as quality monitoring. This access will be limited to the services that the BPO contact center handles for the given client. Any privilege in this group will be provided only with respect to the services where the corresponding user is assigned as a *reviewer*. For more information, see section [Services and Campaigns - Assignment Tab](#). If you assign a certain role to new users by default (see setting *Assign this role to newly created users*), you may have to remove that role explicitly from your BPO clients to prevent them from using system functions other than the ones implied by their BPO client role.

Users tab

The *List of users* shows all the users who currently have the selected role assigned to them. First name, last name, extension number, and team membership are displayed for each user. Double click a specific user row to manage [settings](#) of this user.

To assign the selected role to multiple users, click the **Assign users** button.



Roles > Users tab screen properties

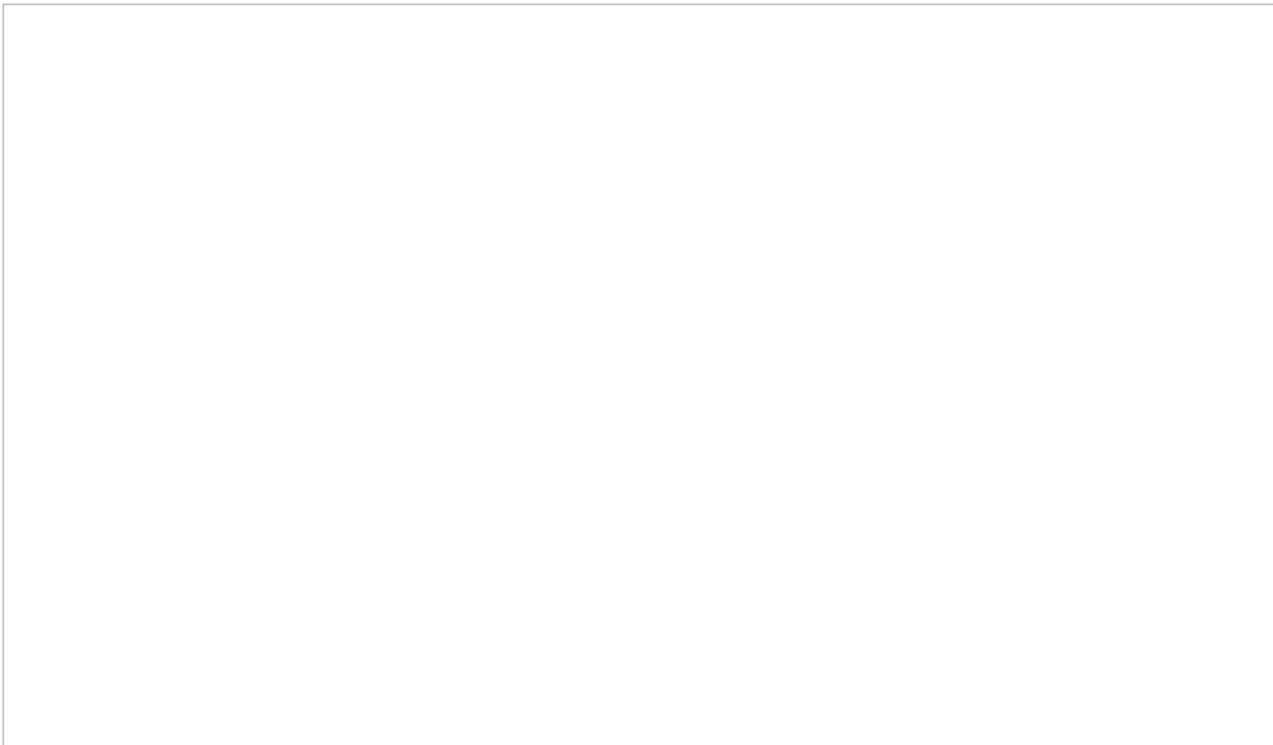
Teams

Teams typically reflect the organization of your contact center. Agent teams, for example, are organized for convenient real-time management so that when a supervisor logs into his or her desktop application, the supervisor will see only the agents of the team that the supervisor is assigned to manage. Agent teams will also appear in historical reports for team-level performance evaluation. Note that team membership of agents may not have any direct effect on the distribution of specific service interactions to them.

Teams for other contact center personnel are set up for organizational purposes only. For example, you can have teams that reflect main functions of contact center management (e.g., campaign operators, scenario designers, workforce managers). Upon initial solution setup, the default team Administrators is created automatically. You can use this team to register initially all non-agent personnel who need access to the system. Note that team membership of non-agents does not have any effect on their ability to access specific contact center resources and functions. Such ability is defined by roles assigned at the individual user level. (See section [Roles](#) for more information.)

Note: Supervisors are assigned at the team level. You may add a supervisor to a team from the *Properties tab > Supervisors* (see the screen properties below).

To set up and edit teams, select the *Teams* option from the *Users & Teams* menu.



Users & Teams > Teams

Organization

Teams are organized into four tabs shown at the top of your screen: Properties, Members, Services, and Dashboard. Click each tab to view and edit specific fields.

Properties Tab



Teams > Properties screen properties

Name

The *Name* is the team name. This field is mandatory, and the name must be unique within the contact center.

Supervisors

Supervisors who are assigned to manage this team may be optionally added. To add a supervisor, click **edit** and select one or more supervisors from the list of users that have the supervisor role. This setting, while optional, is essential for agent teams only. Supervisors assigned to a team will be able to monitor activities of all agents in that team in real time via their desktop applications. Supervisors themselves may or may not be members of the teams that they are assigned to supervise. The system does not impose any restrictions on how many teams one supervisor can be assigned to manage.

Exit After Call Work

Exit After Call Work allows you to set the maximum time in the [After-call Work state](#) for the agents of this team. This setting is optional and is essential for agent teams only.

A pull-down menu displays three options:

- Select **system-wide setting** to use the [timeout defined at the contact center level](#)
- Select **manually** to allow the agents of this team to remain in the After-call Work state until they exit this state manually
- Select **automatically, after** to set the desired timeout in seconds.

Enter After Call Break

Enter After Call Break enables you to specify whether the agents of this team will be allowed to have any rest time when they finish handling a service call (including After-call Work, if it is defined). This setting is optional and essential for agent teams only.

A pull-down menu displays three options:

- Select **system-wide setting** to use the [contact-center-level setting](#)
- Select **enter Break state** to enable the rest time
- Select **do not enter Break state** to make agents automatically ready for next call as soon as they finish handling of current service calls. If you click **do not enter Break state** to the right of the pull-down menu, you will be directed to the General Settings page for configuring your break settings. If you do not wish to change those settings, go back by clicking *Teams* on the main menu on the left-hand side of the screen.

Exit After Call Break

Exit After Call Break is where you set the maximum time in the Break state after finishing a service call for the agents of this team. This setting is optional and is essential for agent teams only.

A pull-down menu displays three options:

- Select **system-wide setting** to use the [timeout defined at the contact center level](#)
- Select **manually** to allow the agents of this team to remain in the Break state until they exit this state manually
- Select **automatically, after** to set the desired timeout (in seconds).

If you click **manually** to the right of the pull-down menu, you will be directed to the General Settings page for configuring your break settings. If you do not wish to change those settings, go back by clicking *Teams* on the main menu on the left-hand side of the screen.

Non-call cases URL

Non-call cases URL is the web page URL that will be displayed for agents upon delivery of a service interaction (unless another URL is provided via the [Web Screenpop block](#) of the applied scenario or via the [settings of the corresponding campaign](#)).

A pull-down menu displays three options:

- Select **system-wide setting** to display the [web page defined at the contact center level](#)
- Select **none** to display no web pages
- Select **custom** to set a web page specific to the agents of this team.

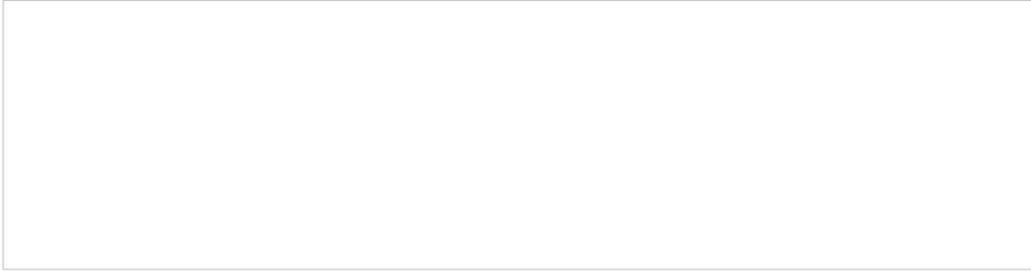
If you click **empty** to the right of the pull-down menu, you will be directed to the General Settings page for configuring your break settings. If you do not wish to change those settings, go back by clicking *Teams* on the main menu on the left-hand side of the screen.

Directory Static Entries

[Static entries](#) describe names and contacts of people/organizations that are external to your contact center. These entries appear in the [directory](#) of the Agent Desktop application. For your convenience, related static entries are arranged in folders.

By default, agents will be able to see **All** directory folders. To select specific folders that the agents of this team will be able to see, click **Selected**, click **edit**, and select the folders in the dialog window that appears. Highlight the desired folders and click the arrow buttons to select or remove them; then hit OK.

Members tab



Teams > Members tab screen properties

Members List

The *Members List* shows all the members (i.e., users) who are currently assigned to this team. Each team member is listed with the following information displayed: first name, last name, extension number, and assigned [roles](#).

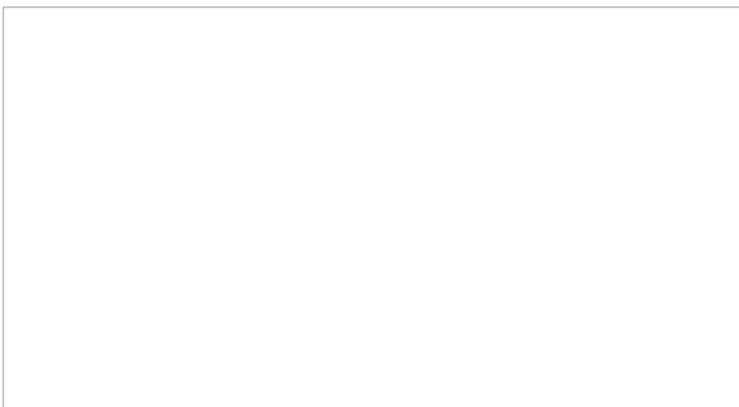
Move to another team

Located at the bottom of the window, the *Move to another team* button allows you to move selected members (users) to a different team. Select one or more members from the list, and then click the button. In the dialog box that pops up, select the team in which your selected member (user) will be placed. Click **OK**.

Change roles

Located at the bottom of the window, the *Change roles* button control allows you to assign or remove the [roles](#) of the selected user(s). Select one or more users from the list, click **Change roles**, and select the new role(s) as appropriate. Click **OK**.

Services tab



Teams > Services tab properties

Services and campaigns provided by this team

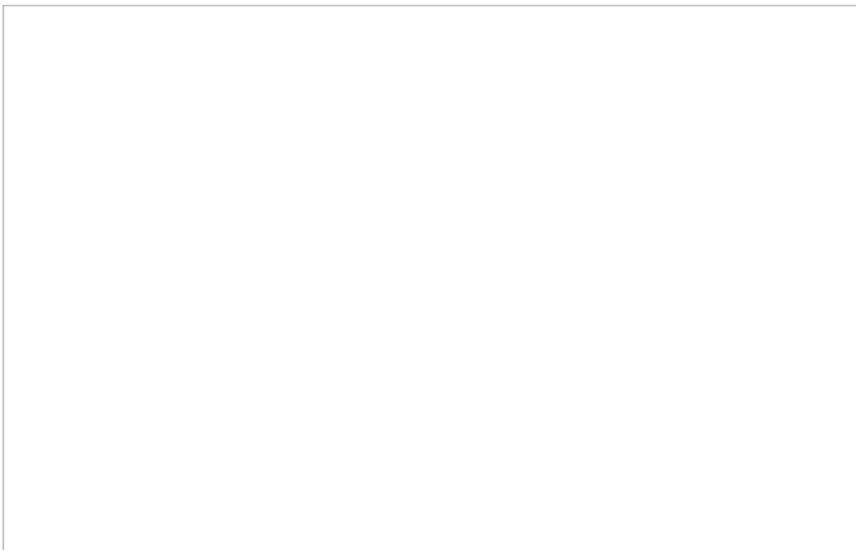
This setting allows you to designate the services that are provided by the agents of this team. This setting is essential for agent teams only. When you assign a service to an agent team, you have the option to assign the default service skill to all members this team with a specific level. If you select this option, all current and future members of the team will get this service skill automatically. Individual levels can be changed manually later. In addition, when you assign a service to a team, supervisors of that team will be able to monitor this service in real time via their desktop applications. For more information, see section [Skill Levels](#).

Click *edit* to assign one or more of the available services to this team and/or to remove previously assigned services. Note that when you remove a service from a team, the associated default service skill will be removed from all members of this team. In the dialog box that pops up, select from the *Available services* on the left and use the arrow controls to move them to *Selected services* on the right. To unassign services from the team, select from the *Selected services* on the right and use the arrow controls to move them to the *Available services* on the left.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making a change to the list of assigned services, we recommend that all affected logged-in agents refresh their browser page.

Dashboard tab

The **Dashboard tab** contains properties that let you configure the content and appearance of metrics for the agents of the given team.



Teams > Dashboard screen properties

General information

The Agent Desktop application shows agents [real-time metrics](#) related to their personal performance, as well as the performance of their teams and services that they deliver. For more information, see section [Dashboard](#) of the *Agent Guide*.

Rotation rate

If an agent handles interactions for several different services/campaigns, metrics related to those services will be displayed for one service at a time. The dashboard will automatically rotate displayed services. *Rotation rate* defines the frequency with which such rotation will take place. From the pull-down menu, select from the following rates (in seconds): **none**, **5 sec**, **10 sec**, **15 sec**, or **20 sec**.

Metrics

Metrics are the data that will be displayed for members of the given team. To add a metric, click **add** and select the desired metric from the drop-down *Metric* menu. For descriptions of the available metrics, see section [Agent Dashboard Metrics](#).

To help with self-evaluation, current values of an agent personal metrics can be provided with the agent's current ranking within the team (checkbox **Show team ranking**), and performance of the closest other agent in ranking (checkbox **Show next value**).

Newly created dashboard metrics will appear at the end of the list. To change the position of a metric in the dashboard, drag it to the desired new location. To edit or remove an existing metric, hover your cursor over it and select the desired function.

Label

The *Label* is the metric name as it will be displayed in the Agent Desktop. Due to the limited space allocated for the metrics on the desktop, metric names should be displayed in an abbreviated form.

Show team ranking

Show team ranking is available for personal agents' metrics only. Select this option if you want the agent's metric value to be accompanied with his current ranking within the team according to this metric. This can help agents with self-evaluation of their performance.

Show next value

Show next value is available for personal agents' metrics only. Select this option if you want the agent's metric value to be accompanied with the value of the same metric for the agent who is directly ahead of this one in the current ranking. (If the agent currently has the top ranking, the value of the next best agent will be displayed.)

Excluded services and campaigns

By default, the metrics you configure will be displayed for all services and campaigns assigned to the given team. If you do not want certain services to be displayed, click **add** and select the services that should be excluded.

Preview

Preview shows you how the dashboard that you have configured will be displayed in the Agent Desktop application.

Note that due to a limited space allocated for the metrics on Agent Desktop, if the given team provides multiple services, metrics related to those services will be displayed for one service at a time.

To see what the dashboard will look like for a specific service, select the desired service from the list. (The difference in the dashboard appearance for different services may be due to service-specific [disposition metrics](#).)

Privileges

Registered users of your Bright Pattern Contact Center solution are assigned *privileges* that can be used to control access to various contact center functions. Privileges are arranged in the same way as they appear on the [Roles](#) page of the Contact Center Administrator application. For general information about privileges and roles, see section [Roles](#).

Privileges are organized into six categories (i.e., groups):

- Interaction Handling
- Security and Administration
- Service and Campaign Administration
- Supervision
- System Administration
- BPO Client

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making a change to privileges, we recommend that all affected agents re-login to Agent Desktop.

Interaction Handling group

Access full-screen Agent Desktop

The *Access full-screen Agent Desktop* privilege allows the user to enable full-screen Agent Desktop view within CRM applications.

Because CRM systems typically have their own email and case management capabilities, the full-screen mode normally would be used by supervisors only.

Delete contacts

The *Delete contacts* privilege allows the deletion of contacts. If enabled, users can delete individual contacts via the Agent Desktop. When a contact is deleted, its activity history is deleted too. Cases are not deleted automatically.

Edit contacts

The *Edit contacts* privilege provides write access to contacts. If enabled, users can create new contacts, and users can modify any fields in existing contacts (but not activity history).

Force pop-out phone window

This privilege is reserved for future use.

Handle automatically distributed interactions

The *Handle automatically distributed interactions* allows the user to receive calls from a service queue and preview records. This is the basic privilege that allows the user to perform typical call center agent work (i.e., provide services over the phone and participate in outbound campaigns).

The ability to handle customer chat or email interactions is controlled via separate privileges (see *Handle email* and *Handle service chat*).

Handle email

When enabled, the *Handle email* privilege allows users to:

- Edit cases
- Create new cases manually
- Open cases from search results (even if they are already open by other agent)
- Mark cases as spam

Handle service chats

With the *Handle service chats* privilege, the user may [handle chat interactions with customers](#). This includes chat interactions started by customers via SMS.

Note that the ability to initiate a chat with a customer via SMS is controlled by a separate privilege (see *Initiate SMS conversation*). Likewise, the ability to use internal chat is controlled by a separate privilege (see *Send internal chats*).

Initiate SMS conversation

The *Initiate SMS conversation* privilege allows the user to [initiate chats with customers via SMS](#).

Listen to call recordings and view chat transcripts on assigned services

With this privilege granted, the user may review [call recordings](#) and [chat transcripts](#) of the services that the user is qualified to handle (i.e., has corresponding [service skills](#)).

Listening to own call recordings and view own chat transcripts

This privilege provides Agent Desktop users the capability, via activity history, to access recordings where the agent participated (at least partially). This privilege applies to Agent Desktop only.

Login to Agent Desktop

Login to Agent Desktop allows the user to log in to Agent Desktop application and perform basic back-office telephony functions. Any user who needs access to Agent Desktop must have this privilege. Note that this privilege alone is not sufficient for performing typical contact center agent work.

Note that any user who logs into Agent Desktop will be counted as a concurrent user for the duration of the login session. Your service provider may impose a limit on how many of your users may be logged on concurrently.

Make external calls

A user with the *Make external calls* privilege may make external calls and blind transfers to external destinations from the Agent Desktop application. If the user does not have this privilege, an attempt to make an external call or blind transfer will result in a text error message displayed on Agent Desktop.

Note that the absence of this privilege does not prevent users from making external calls using the dial pad of their hardphones.

Mask original email content

The *Mask original email content* privilege allows the user to mask fragments of original customer email text. For more information, see section [How to Mask Sensitive Data](#) of the *Agent Guide*.

Modify own identification data

The *Modify own identification data* privilege allows the user to be able to modify specific fields of the user profile. If the privilege is not present, the following fields are locked:

- First Name
- Last Name
- Chat Nickname

See other agents/teams in directory

This privilege lets the user see all configured teams and team members in the Agent Desktop directory and view their current availability (presence). For more information, see section [How to Use the Directory](#) of the *Agent Guide*.

See other agents' cases

See other agents' cases allows the user to see cases handled by other agents. If the user does not have this privilege, the user will be able to see only cases that with which the user has worked. This privilege affects [case search](#) only. Absence of this privilege does not affect the user's ability to receive emails related to existing cases that the user has not worked on.

Send internal chats

The *Send internal chats* privilege allows the user to [initiate internal chat conversations](#).

Start recording of interactions

With this privilege, the user may [start call recording](#).

Stop recording of interactions

Stop recording of interactions allows the user to [stop call recording](#).

Transfer calls

The *Transfer calls* privilege allows the user to [transfer customer interactions to consultation parties](#) and [host conferences](#) (both via-consultation and single-step).

Absence of this privilege does not affect user's ability to

- make blind transfers of customer interactions
- transfer or conference internal calls

Use Calendar

The *Use Calendar* privilege enables users to use the Agent Desktop [calendar](#) for scheduling.

Use Favorites tab

Use Favorites tab is an agent-level privilege that controls whether the user can see and set favorites from the Agent Desktop application. This privilege is an agent behavior control to prevent users from dialing destinations that they should not based on FCC/TCPA and organizational rules.

Use Recent Calls tab

The *Use Recent Calls tab* privilege lets the user restrict access to recent calls. This privilege uses TCPA manual dialing to limit which agents can access recent calls.

Use RightNow

Use RightNow allows the user to use Agent Desktop embedded into the RightNow application. This privilege enables access to the Agent Desktop widget within RightNow.

For more information, see the [RightNow Integration Guide](#).

Use ServiceNow

Use ServiceNow allows the user to use Agent Desktop embedded into the ServiceNow application. This privilege enables access to the Agent Desktop widget within ServiceNow.

For more information, see the [ServiceNow Integration Guide](#).

Use Zendesk

With the *Use Zendesk* privilege, the user may use Agent Desktop embedded into the Zendesk application. This privilege enables access to the Agent Desktop widget within Zendesk. To enable full-screen Agent Desktop view within Zendesk application, the user must also have the *Access full Agent Desktop* privilege.

For more information, see the [Zendesk Integration Guide](#).

Security Administration group

Can edit and erase interaction records

This privilege provides access to the manual erasure functions in accordance with PCI DSS 3.2 and GDPR requirements. With this privilege enabled, users will be able to edit and erase interaction records securely and manually in the event that another user has mistakenly included a customer's sensitive data in interaction content (e.g., call recording, chat, etc.).

This privilege is added to predefined Security Administrator and System Administrator roles.

Grant all privileges

Grant all privileges allows the user to grant any privilege, regardless of the user's *May grant or revoke* settings with respect to specific privileges. This is helpful during product upgrades where new privileges may be introduced.

Manage roles and security settings

With this privilege enabled, the user has full access to the following settings:

- [Roles](#)
- [Security Policy](#)
- [System Access Restrictions](#)
- [Encryption Key Management](#)

Service and Campaign Administration group

Configure reporting settings

With this privilege enabled, the user has full access to the following settings:

- [Report Templates](#)
- [Scheduled Reports](#)
- [Reporting Settings](#)

Configure system-wide settings

The *Configure system-wide settings* privilege gives the user full access to all pages of the following menus: *Tasks*, *Call Center Configuration*, and *Quality Management*.

For tasks, note that all users who have the *Configure system-wide settings* privilege enabled will receive an email notification each time a scheduled task fails.

Control campaign operations

Control campaign operations enables the user to [view and control assigned campaigns](#) via Agent Desktop.

A user must have this privilege in order to be available for selection as a service/campaign operator via the *Services and Campaigns > Assignments* page. In the Agent Desktop application, access will be limited to campaigns where the user is assigned as an operator.

If this privilege is revoked from a user, the user's name will appear in red color in the list of operators of any services/campaigns that the user may have been previously assigned to operate.

Edit knowledge base

The *Edit knowledge base* privilege gives the user full access to the [Knowledge Base](#) via the Contact Center Administrator application. It also allows the user to create articles in the *Knowledge Base* via the Agent Desktop application.

Note that access to the *Knowledge Base* via the Agent Desktop application is provided in the context of the services that the user can handle.

Manage all services and campaigns

The *Manage all services and campaigns* privilege allows the user to configure all existing services campaigns regardless of whether the user is assigned to them as an administrator. Note that in order to [assign teams to campaigns](#), the user must also have the *Manage teams* privilege.

Another privilege exists to enable the user to access only assigned services campaigns (see below). Note that in order to prevent the user from creating new services and campaigns, both these privileges must be disabled.

Manage assigned services and campaigns

With this privilege, the user has full access to configuration of the services and campaigns that the user is assigned to as an administrator. For more information, see section [Services and Campaigns - Assignments Tab](#).

Note that in order to assign teams to a service/campaign, the user must also have the *Manage teams* privilege.

Another privilege exists to enable the user to access all configured campaigns regardless of assignment (see above). Note that in order to prevent the user from creating new campaigns, both these privileges must be disabled.

Manage lists

The *Manage lists* privilege gives the user full access to [calling lists](#) and [do-not-call \(DNC\)](#) lists. Absence of this privilege does not affect the user's ability to [associate existing lists with campaigns](#).

Manage scenarios

The *Manage scenarios* privilege allows the user to create, view, and edit [scenarios](#). Absence of this privilege does not affect the user's ability to [configure scenario entries](#) and associate such entries with existing scenarios.

Manage skills

With the *Manage skills* privilege, the user may create and edit existing [auxiliary skills](#) and [assign skills to agents](#) with specific levels.

Supervision group

Access Real-time Stats API

The *Access Real-time Stats API* privilege gives the user access to applications that are connected to Bright Pattern Contact Center via the Real-time Stats API; this includes viewing the [wallboard application](#). **Note:** The availability of data on the Agent Desktop Home Screen is not affected by this privilege, with the exception of the wallboard icon.

All assigned teams combined view

When enabled, this privilege will show, on the supervisor's home screen, the agents from all teams assigned to the logged in supervisor, specifically with the following metrics:

- State
- Time in State
- Not Ready Reason (if not ready for a reason)
- Team (new metric)
- Active interactions

It shows all services that are the teams are assigned to (individual services can be hidden if needed), specifically the following metrics:

- Calls in Queue
- Service Level
- # of Agents in Queue
- # of Ready Agents
- Current Max Wait Time (for calls in Queue)

Can see contents of email push queues

This privilege allows supervisors of teams with [the push distribution method](#) enabled to view push queues. Push queue items appear in team queues when the "All Services with Push Queues" option is selected; however, it is possible to select only one service and see only its queue.

While looking at a push queue, a supervisor can:

- Sort the queue as they like (i.e., using existing pull queue sort controls)
- Assign an item to an agent
- Assign one or more items to another queue and skill requirement

- Open an item to work with
- Delete an item or mark it as spam

Note that this setting is not assigned to any roles by default.

Can update final dispositions

This privilege enables users (i.e., agents, supervisors) to update dispositions even when final.

Change alert configuration

Users with the *Change alert configuration* privilege may enable/disable [alerts](#) available for some real-time metric displayed via Agent Desktop, change their appearance, and modify threshold values that trigger such alerts.

Note that the ability to set configured alerts as system-wide defaults is controlled via a separate privilege (see *Set alerts for real-time metrics system-wide*).

If the user does not have this privilege, the Alert Configuration dialog of the Agent Desktop will provide read-only information about the current alert configuration.

Change real-time metric views

The *Change real-time metric views* privilege allows the user to add metrics to, and remove them from, any [real-time metric views](#) of the Agent Desktop application. The user may also change the order in which the metrics appear in the table views.

Absence of this privilege does not affect the user's ability to add services and campaigns to, and remove them from, real-time metric views.

Note that the ability to set created real-time metric views as system-wide defaults is controlled via a separate privilege (see *Set real-time metric views system-wide*).

Customize Wallboards

The *Customize Wallboards* privilege allows additional elements to appear on the user's wallboard. These elements include title, selector, flip arrows, and menu. Using these elements, users can customize the look and display of their Agent Desktop wallboard. Using the Wallboard Layout Editor, cards and cells can be added, deleted, scaled, and expanded using mouseovers, click-and-drag, and drag-and-drop movements.

Define/View subteams of selected agents

The privilege *Define/View subteams of selected agents* enables subteam controls to be displayed in Agent Desktop and the Reports portal. In addition, the privilege allows users to switch between them. Subteams are smaller groups of agents that supervisors have selected from full teams.

Delete cases

The *Delete cases* privilege allows the deletion of cases. If enabled, users can delete individual cases via the Agent Desktop. When a case is deleted, all interactions related to a case are deleted.

Download recordings and transcripts

With this privilege, the user may download [call/screen recordings](#), [chat transcripts](#), and [email messages](#) from the interaction search and review pages of the Contact Center Administrator application.

Force agent states

The *Force agent states* privilege allows the user to [change current agent states](#) of members of any team that the user is assigned to supervise.

Grade interactions

Grade interactions allows the user to grade interactions [while monitoring them in real-time](#) via Agent Desktop and/or when [reviewing their recordings/transcripts](#) via the Contact Center Administrator application.

Note that in order to grade interactions while reviewing their recordings/transcripts, the user must also have the privilege *Listen to call recordings and view chat transcripts* (see below).

Listen to recordings linked to external CRM records

This privilege allows the user to listen to call recordings linked to activity history in the CRM records.

Listening to all call recordings and view all chat transcripts

With *Listening to all call recordings and view all chat transcripts*, the user may [review voice recordings and chat transcripts](#) via the Contact Center Administrator application.

Absence of this privilege does not affect the user's ability to review screen recordings in the [Agent Timeline](#) or email messages in the [Interaction Search](#).

When removing this privilege from a user, make sure this user also does not have the privilege *Listen to call recordings and view chat transcripts for assigned services* in the *BPO Client* group (see below).

Manage canned chat responses system-wide

The *Manage canned chat responses system-wide* privilege allows the user to make canned chat responses available to all other agents of the contact center. For more information, see section [How to Create and Edit Canned Chat Responses](#) of the *Agent Guide*.

Monitor agent screen

When enabled, the *Monitor agent screen* privilege allows the user to view and monitor the screens of a selected agent that the user is assigned to supervise.

Monitor interactions

The *Monitor interactions* privilege allows the user to connect to calls handled by agents that the user is assigned to supervise in [silent monitoring, coaching, and barge-in modes](#). For more information, see section *Call Monitoring, Coaching and Barge-In* of the *Supervisor Guide*.

Pull screen pop

Pull screen pop allows the user to [get snapshots of the Context Information Area](#) of the desktops of agents that the user is assigned to supervise. Note that in order to be able to get a snapshot, the user must be connected to the agent in one of the call monitoring modes. Thus, the user also must have the privilege *Monitor interactions* (see above).

Push/Pull Global Wallboards

Users with the privilege *Push/Pull Global Wallboards* can push their personal wallboards to other users and/or teams, as well as pull shared wallboards from a global pool. Note that only global wallboards can be pulled.

Set alerts for real-time metrics system-wide

This privilege allows the user to [set alerts](#) that the user configures as system-wide defaults. Note that in order to use this privilege, the user must also have privilege *Change alert configuration*.

Set real-time metric views system wide

Set real-time metric views system wide allows the user to set real-time metric views that the user configures as system-wide defaults. Note that in order to use this privilege, the user must also have the privilege *Change real-time metric views*.

For more information, see section [Customization of Metric Views](#) of the *Supervisor Guide*.

View historical reports

The *View historical reports* privilege allows the user to [generate and view reports](#) via the Contact Center Administrator application. Absence of this privilege does not affect the user's ability to access any of the general reporting settings or be a recipient of emailed scheduled reports.

View interaction records

With this privilege, the user may [search for and review interaction records](#) via the Contact Center Administrator application.

Absence of this privilege does not affect the user's ability to generate and view the [Call Detail Report](#) or [Email Detail Report](#). To prevent access to these reports, use privilege *View historical reports* (see above).

View real-time agent metrics

View real-time agent metrics allows the user to [view real-time metrics for the agents](#) of the teams that the user is assigned to supervise.

View real-time service metrics

With *View real-time service metrics*, the user may [view real-time metrics for all services](#) associated with the teams that the user is assigned to supervise.

Absence of this privilege does not affect the user's ability to [view campaign-specific metrics](#). To prevent access to these metrics, use privilege *Control campaign operations* (see above).

Watch agent screen recordings

The privilege *Watch agent screen recordings* allows supervisors to search for and view the screen recording sessions of agents on their teams. The screen recordings appear in interaction records in agent timeline searches. If a screen recording is available for the selected agent, and if the privilege is enabled, then the *Watch screen recording* button is shown to the supervisor.

System Administration group

Privileges associated with system administration are described as follows.

Allow recording export API access

This privilege allows users to access the [Recording Retrieval API](#) that retrieves call recordings and metadata based on the call identifier.

Bulk Export/Import Contacts

When enabled, the privilege *Bulk Export/Import Contacts* allows the export/import icon on the Agent Desktop Contacts screen to be shown.

Configure Contact Forms and fields

The *Configure Contact Forms and field* privilege allows users to edit contact, activity history, and augmentation and case forms.

Configure directory

The *Configure directory* privilege allows the user to [create and modify external contacts](#) that appear in the [Directory](#) of the Agent Desktop application.

Manage BPO Clients

When enabled, the *Manage BPO Clients* privilege allows users to:

- Create, edit, and delete BPO clients in the Contact Center Administrator application
- Assign forms and teams to BPO clients

Manage all teams

If granted the *Manage all teams* privilege, the user may

- create teams and change configuration of all existing users and teams
- create users and change configuration of existing users, provided that the user also has the *Manage users* privilege (see below)
- assign skills to, and change skill levels of, all existing agents, provided that the user also has the *Manage skills* privilege (see above)

For more information, see sections [Users](#), [Teams](#), and [Skill Levels](#).

Note that if a user is assigned as a supervisor of a particular team, absence of this privilege does not affect the user's ability to change most of the configuration settings of the given team and its current members.

Manage phones

The *Manage phones* privilege gives the user full access to configuration of [softphones](#), [hardphones](#), [access numbers](#), and [scenario entries](#). Absence of this privilege does not affect the user's ability to assign phone numbers to users.

Manage users

The *Manage users* privilege allows the user to create [users](#) and change configuration of existing users, provided that he also has the *Manage all teams* privilege (see above).

Privileged Access IP Range

The *Privileged Access IP Range* privilege allows users (e.g., administrators) to be able to log in to the system from any IP address (e.g., a public place such as a coffee shop). Without this privilege, users can only log in from specific IP addresses.

Publish help

Publish help gives the user full access to configuring [help screens](#).

View audit log

With the *View audit log* privilege, the user can view the [audit log](#).

View usage data

The *View usage data* privilege allows the user to access to reports about usage of telecom carriers' resources via *Contact Center Administrator > Reports > Usage*.

BPO Client group

Listening to call recordings and view chat transcripts on services in reviewer role

With this privilege granted, the user may listen to [call recordings](#) and view [chat transcripts](#) of the services to which the user is assigned as a [reviewer](#).

General Settings

General settings define various aspects of your operations that apply to your entire contact center as opposed to any individual entity. When you specify a certain parameter at this level, the specified value will be applied to all corresponding resources of your contact center. Note that some of the same settings can also be defined at lower levels such as teams, services, and/or users. The values defined at such lower levels always supersede these general settings defined at the contact center level.

To view and edit the general settings, select the *General Settings* option from the *Call Center Configuration* menu. Note that all of these settings are optional.



Call Center Configuration > General Settings

Screen Properties

The *General Settings* screen properties are described as follows.

Default time zone

The *Default time zone* is the time zone that will be used by default when you define time-based parameters of your contact center resources such as service hours. Note that you will be able to change this default time zones setting when defining time-based parameters of individual contact center resources. Note also that changing this default time zone parameter will not affect any of the previously defined time-base parameters of your contact center.

Default country

The *Default country* is the "home country" that will be used by default when you define location-based parameters of your contact center resources. The tenant numbers for the default country will be shown in national format, whereas other countries will be shown in international format.

System Not Ready reason names for

This property allows you to define custom names for the Not Ready agent state for various conditions when the system automatically applies this state to agents. The Not Ready state indicates that the agent is logged in but is temporarily unavailable to handle customer interactions.

If defined, such custom names will be displayed instead of the generic *Not Ready* in the corresponding situations for the agents themselves, for the supervisors monitoring agents' performance, and in the agent activity reports.

Agent no answer

This property means that the agent is set to *Not Ready* because the agent has rejected an incoming service interaction or failed to answer it within a predefined amount of time. The default name is *No answer*. The No Answer timeout is specified in the [Connect Call](#) scenario block. The default value is 10 seconds.

UI connection loss

The agent is set to *Not Ready* because the connection between the Agent Desktop application and the system has been lost. The default name is *Connection loss*.

After call break

The agent is set to *Not Ready* because the agent has finished handling an interaction and must have a mandatory break time. (See setting *Enter Break* below.) The default name for this is *After call break*.

Logout Pending

The agent is set to *Not Ready* because the agent has requested to be logged out of the system while handling an interaction (e.g., when the agent's working shift is almost over). In this case, the system will let the agent finish processing the current interaction and will then switch the agent to *Not Ready* for a brief moment before logging out the agent.

Note that if the only active interactions are emails, the logout will be immediate. All actively processed emails will be stored as [drafts](#) in the agent's *My Queue*.

Custom Not Ready reasons

This allows you to define a custom name and select an icon for the *Not Ready* agent state, depending on the reason the agent makes sets the state manually to *Not Ready*. If such reasons are defined, agents will have to select one of these reasons, instead of the generic *Not Ready*, when making themselves unavailable to handle customer interactions.

Bright Pattern Contact Center provides a number of default *Not Ready* reasons. To delete or edit any of the existing reasons, hover over their names. To define additional *Not Ready* reasons, click **add**. Up to 40 custom *Not Ready* reasons can be created.

Agent state upon login

The state that will be applied to the agents of your contact center when they log into their Agent Desktops. You can select any of the custom *Not Ready* reasons defined above or make the agent *Ready*. Note that if you select *Ready* for this setting, the agents may start receiving customer interactions as soon as they log in. Otherwise, they will have to make themselves *Ready* manually before they begin receiving any service calls.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making a change to this property, we recommend that all affected logged-in agents refresh their browser page.

Auto logout timeout upon connection loss

This specifies how long the system will wait for the Agent Desktop application to reconnect, from the moment a connection loss is detected, before the agent is logged out automatically.

Enter After Call Work

This property specifies whether After Call Work is used in your contact center. If selected, agents will enter the *After Call Work* state after finishing any type of service call. Note that you can override this setting at the [service level](#).

Exit After Call Work

Exit After Call Work sets the maximum time in the *After Call Work* state for the agents of your contact center. This setting is essential only if option *Enter After Call Work* is selected. If you wish to restrict the After Call Work time, select the checkbox and set the desired timeout in seconds. Deselect this option to allow the agents to remain in After Call Work until they exit this state manually. Note that you can override this setting at the [team level](#).

Enter Break

Enter Break specifies whether the agents of your contact center will be allowed any rest time when they finish handling of a service call including after-call work. Select this option to enable a mandatory break.

Exit Break

Exit Break sets the maximum time in the Break state after finishing a service call for the agents of this team. This setting is essential only if option *Enter Break* is selected. If you wish to restrict the mandatory break time, select the checkbox and set the desired timeout in seconds. Deselect this option to allow the agents to remain in the *Break* state until they exit this state manually. Note that you can override this setting at the [team level](#).

Non-call cases URL

This is the URL of the web page that will be displayed for agents upon delivery of a service interaction, unless another URL is specified at the [team level](#), or provided via the [Web Screenpop block](#) of the applied scenario or via the [settings of a preview campaign](#).

Display name format

Display name format is the format for displaying users' names in reports and in the Agent Desktop application.

External number inactivity timeout

This setting is essential for agents who connect to the system using the phone device option [An external phone](#). The setting specifies in how many minutes agents' external phone connection will be disconnected automatically in absence of any active calls on them. This enables the reuse of a once-established physical connection for subsequent voice calls. If you prefer agents' external phone connections to be released as soon as the remote party hangs up, set this timeout to zero.

Agent daily Not Ready time limit

This setting allows you to configure the maximum amount of time an agent can be in a Not Ready state. This threshold is used for the [Break Time Remaining](#) widget in Agent Desktop, section *My Grades*.

Require service on outbound calls

If this setting is selected, logged-in agents must first select a service before making an outbound call.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making a change to this property, we recommend that all affected logged-in agents refresh their browser page.

Email Settings

This menu contains various settings related to email communications. Note that in addition to customer interactions, email in Bright Pattern Contact Center is used for various auxiliary tasks, such as sending transcripts of chat sessions, password reset instructions, scheduled reports, and voicemail audio files.

To configure email settings, select **Email Settings** from the *Call Center Configuration* menu.

Note the following:

- Except for the SMTP settings, configuring the system to send voicemail attachments is done via scenarios. For more information, see section [Voicemail](#) of this guide and description of the [Voicemail](#) block in the *Scenario Builder Reference Guide*.
- Except for the SMTP settings, configuring the system to send reports via email is done via the [Scheduled Reports](#) page.
- Except for the SMTP settings and chat transcript template, configuring the system to email chat transcripts is done via scenarios. Note that the *EMail* scenario block is not used for this purpose. Rather, sending a chat transcript email is triggered by setting variable $$(item.sendTranscript)$ to 1 in the chat scenario. You can see an example of such configuration in the *Support Chat* [scenario template](#).

Email Header and Footer

This section relates to customer email interactions and lets you define mandatory standard messages that will be inserted above (the header) and/or below (the footer) the main text of each email that is sent to a customer. Some examples of such messages are references to case numbers, legal disclaimers, and a company's contact information. Headers and footers are not applied to [acknowledgements](#) (initial automatic replies sent to acknowledge receipt of incoming mail).

Note: The headers and footers configured here will be applied to all emails sent from your contact center regardless of the service. For service-specific email templates, default [Knowledge Base](#) articles should be used.

To configure these elements, select option **Email Header and Footer** from the *Email Settings* menu.



Email Settings > Email Header and Footer

Header and Footer Screen Properties

The *Email Header and Footer* screen properties are described as follows.

Language

The *Language* setting is where you select the language of the header and footer message. Note that you can define the header and footer in multiple languages. The system will automatically insert the version corresponding to the language of the main text of the email.

Please note: The languages listed here differ from those found in [Language Skills](#); only auto-detectable languages are available to select from this menu.

Header

Type the text of the message that should appear in the *Header* field, above the main text of all emails sent to customers.

Footer

Type the text of the message that should appear in the *Footer* field, below the main text of all emails sent to customers.

Insert \$()

This setting specifies the menu of substitution fields that can be inserted in the header and footer messages. Except for *\$(cursor)*, these are the same [substitution fields](#) that are used in Knowledge Base articles.

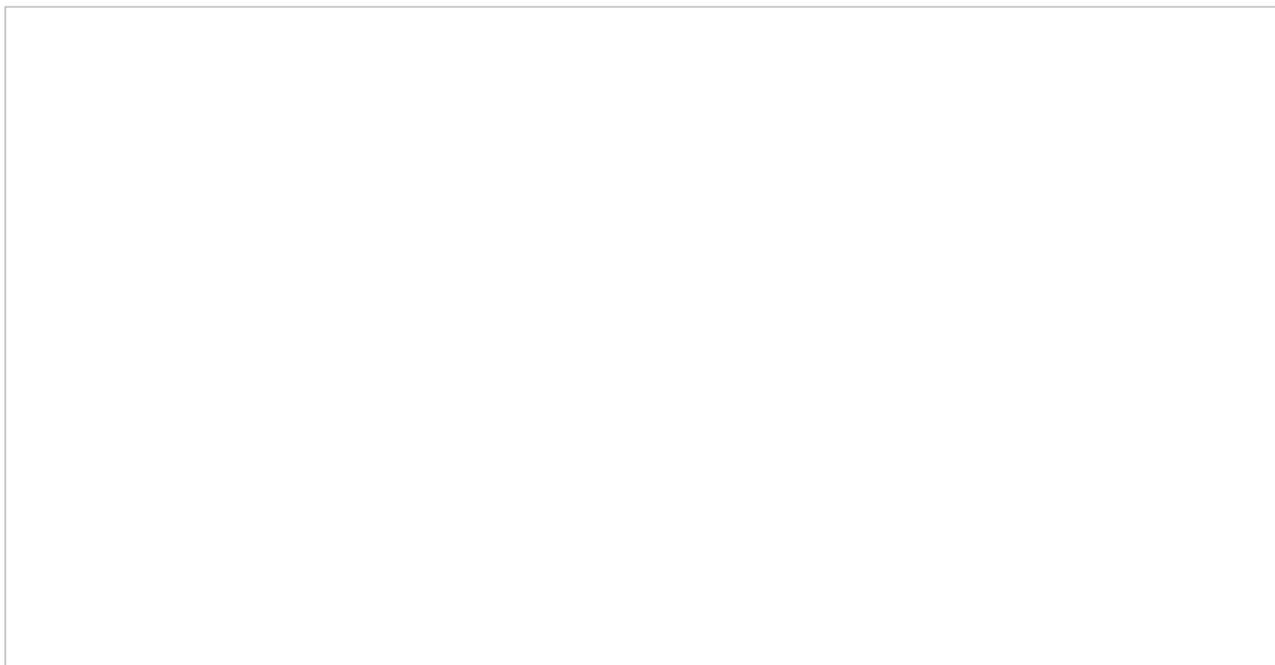
Remove

Use the *Remove* button to remove the header and footer in the selected language.

SMTP Configuration

This section contains settings for connection to the SMTP server used for auxiliary email communications, including transcripts of chat sessions, password reset instructions, scheduled reports, and voicemail audio files. Note that this section is not used to configure SMTP for the outbound email interactions with customers. For the latter, [email scenario entries](#) are used.

To configure SMTP connection settings, select **SMTP Configuration** from the **Email Settings** menu.



SMTP Configuration Screen Properties

The *Email SMTP Configuration* screen properties are described as follows.

System sender display name

Sender display name is the name that will appear in the *From* field of the emails with password reset instructions.

System sender email address

This is the email address that will appear in the *From* field of the emails with password reset instructions.

SMTP server hostname

SMTP server hostname specifies the SMTP server host name.

SMTP server port

SMTP server port specifies the SMTP server port.

Connection security

Connection security indicates whether a cryptographic protocol (TLS or SSL) will be used to secure this connection.

- For a nonsecure connection, select **none**.
- To negotiate encryption in a plain connection, select **negotiate encryption in a plain connection (STARTTLS)**.
- For an immediate secure connection, select **use an encrypted connection (TLS/SSL v3)**.

Server requires authentication

This setting indicates whether client authentication is required for the SMTP server.

Username

Username is the user name for SMTP client authentication. This user name must be specified if the *Server requires authentication* option is selected.

Password

Password is the password for SMTP client authentication. The password must be specified if the *Server requires authentication* option is selected.

Check settings

Use the *Check settings* button to verify the correctness of your SMTP settings.

Password Recovery Template

To configure a template for password reset instructions, select **Password Recovery Template** from the *Email Settings* menu.



Email Settings > Password Recovery Template

Password Recovery Template Screen Properties

The *Password Recovery Template* screen properties are described as follows.

Subject

This setting specifies the text that will appear in the *Subject* field of the emails with password reset instructions.

Message

This setting specifies the text that will appear in the body of the emails with password reset instructions.

You can use the following variables in this text:

- *\$(FIRST)* for the first name of the email recipient
- *\$(LAST)* for the last name of the email recipient
- *\$(LOGIN)* for recipient's username
- *\$(LINK)* as a placeholder for password recovery link

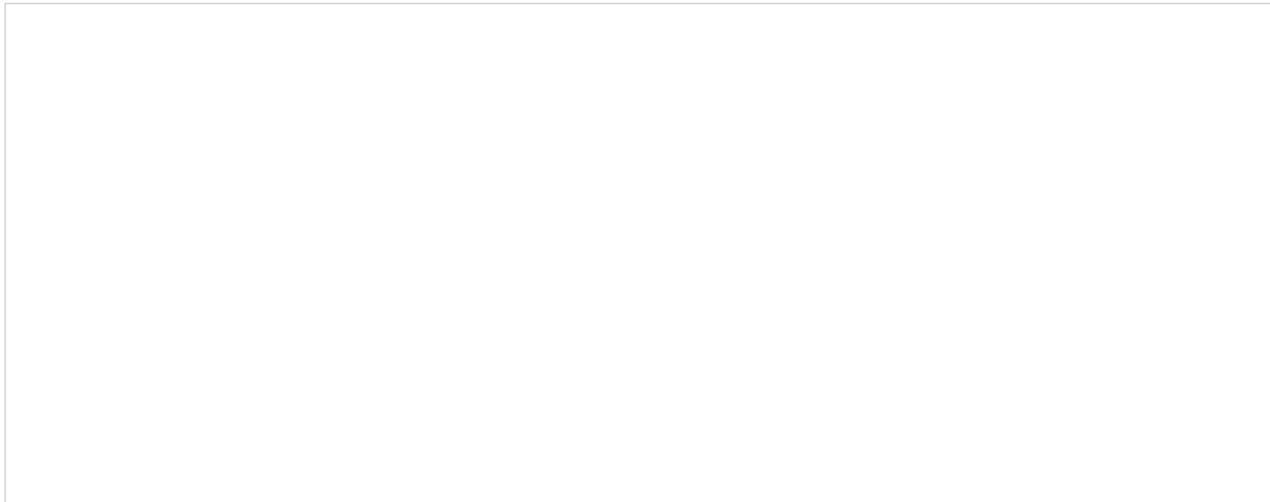
Chat Transcript Template

To configure a system-wide template for chat transcripts, select **Chat Transcript Template** from the *Email Settings* menu. Note that it is possible to configure chat transcript templates per [Scenario Entry](#).

In order for transcripts to be emailed, you will need the following:

- **A configured SMTP server** - In order for the system to automatically send emails, you will need complete [SMTP Configuration](#).
- **A configured pre-chat form with an email field** - Transcripts are emailed to the address(es) specified in fields containing the variable [\\$\(item.email\)](#) when the session ends.
- **A chat scenario containing \$(item.sendTranscript)** - In the corresponding chat scenario, you must include a [Set Variable](#) scenario block with the variable [\\$\(item.sendTranscript\)](#); the value must be set to 1 in order for the

transcript to send.



Email Settings > Chat Transcript Template

Chat Transcript Template Screen Properties

The *Chat Transcript Template* screen properties are described as follows.

System sender display name

This is the name that will appear in the *From* field of the emails with chat transcripts. This setting is mandatory for sending emails with chat transcripts.

System sender email address

The *Sender email address* will appear in the *From* field of the emails with chat transcripts. This setting is mandatory for sending emails with chat transcripts.

Subject

This setting specifies the text that will appear in the *Subject* field of the emails with chat transcripts.

Message

This setting specifies the text that will appear in the body of the emails with chat transcripts.

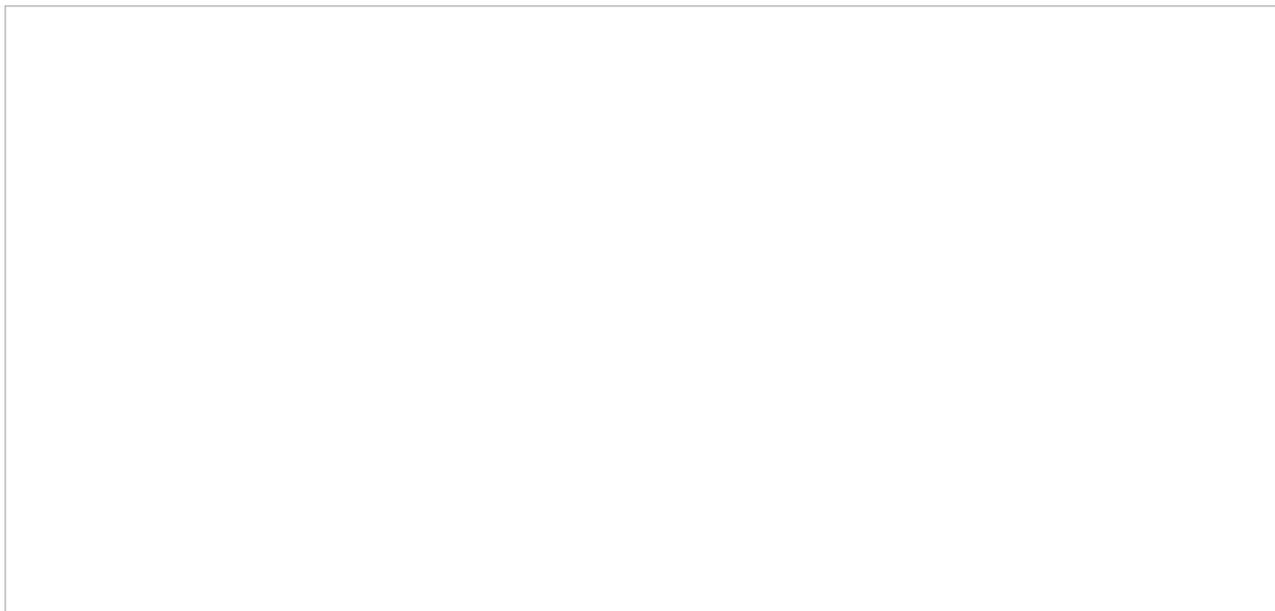
You can use the following variables in this text:

- *\$(FIRST)* for the first name of the email recipient
- *\$(LAST)* for the last name of the email recipient
- *\$(LOGIN)* for recipient's username
- *\$(CHAT_TRANSCRIPT)* for chat transcript
- *\$(TENANT_NAME)* for your business name as it is registered with your service provider

Voicemail

Bright Pattern Contact Center supports voicemail functions. For more information about Bright Pattern Contact Center voicemail, see sections [Configuring Your Voicemail](#) and [Listening to Voicemail Messages](#) of the *Bright Pattern Contact Center Agent Guide*.

To configure general (system-level) voicemail settings, select the **Voicemail** option from the **Call Center Configuration** menu. Personal email settings are configured via the [Users](#) menu of the Contact Center Administrator application and/or [User Profile](#) settings of the Agent Desktop application.



Call Center Configuration > Voicemail

Screen Properties

The *Voicemail* screen properties are described as follows.

Voicemail forwarding timeout

This is the default timeout for forwarding of unanswered calls to voicemail. The default value is 15 seconds. Users can redefine this timeout via their individual profile settings.

Voicemail scenario

Voicemail scenario indicates which scenario should be used for the voicemail function. The *Default* scenario is built-in and is configured using the remaining settings on this screen. The default scenario provides a generic voicemail function that should be sufficient in most cases. For complex voicemail functions (e.g., different content of the email notification depending on the type of call), you can define a different scenario that can use any number of [Voicemail](#) blocks configured for various conditions.

Prompt for “user at extension” message

This setting can be changed for the *Default* voicemail scenario only (see above).

The prerecorded default greeting is in English and sounds like this: *The user at extension [user's extension number] is not available. At the tone, please record your message.*

Use this setting to modify the segment of this greeting that comes before the extension variable.

Note that users can record [personalized greetings](#), which will be applied instead of this default greeting when someone tries to reach them in their absence.

Prompt for “is not available...” message

This setting can be changed for the *Default* voicemail scenario only (see above).

Use this setting to modify the segment of this greeting that comes after the extension variable in the prerecorded default greeting (see above).

Use secure voicemail

This setting can be changed for the *Default* voicemail scenario only (see above).

Voicemail notifications are delivered to users via email. By default, voicemail messages are attached to those emails as audio files and can be played back via any standard media player. If you select this checkbox, the voicemail messages will be stored encrypted in the system and the emails will instead contain a link that will require authentication prior to message playback. For more information, see section [Listening to Voicemail Messages](#) of the *Agent Guide*.

Note that any user registered in the system will be able to listen to the voice message upon clicking the link and logging in. This capability is essential to enable message recipients to forward some of their voicemail to other users. If you wish to ensure that only the original recipients can access their voicemail, create a different voicemail scenario with option [Allow only this user](#) enabled.

From display name

This setting specifies the display name of the email sender. This setting can be changed for the *Default* voicemail scenario only (see above).

From address

This setting specifies the email address of the email sender. This setting can be changed for the *Default* voicemail scenario only (see above).

Subject

This setting specifies the subject line of the email. The *Subject* setting can be changed for the *Default* voicemail scenario only (see above).

Message

This setting can be changed for the *Default* voicemail scenario only (see above).

The text to be sent as a message body. If the email notification contains an access link (as opposed to an audio file attachment), the link should consist of your Agent Desktop URL and variable $\$(URL_SUFFIX)$. For example: [http://abc-insurance.my-service-provider.com/\\\$\(URL_SUFFIX\)](http://abc-insurance.my-service-provider.com/\$(URL_SUFFIX)). To insert and edit default message body text, click **default**.

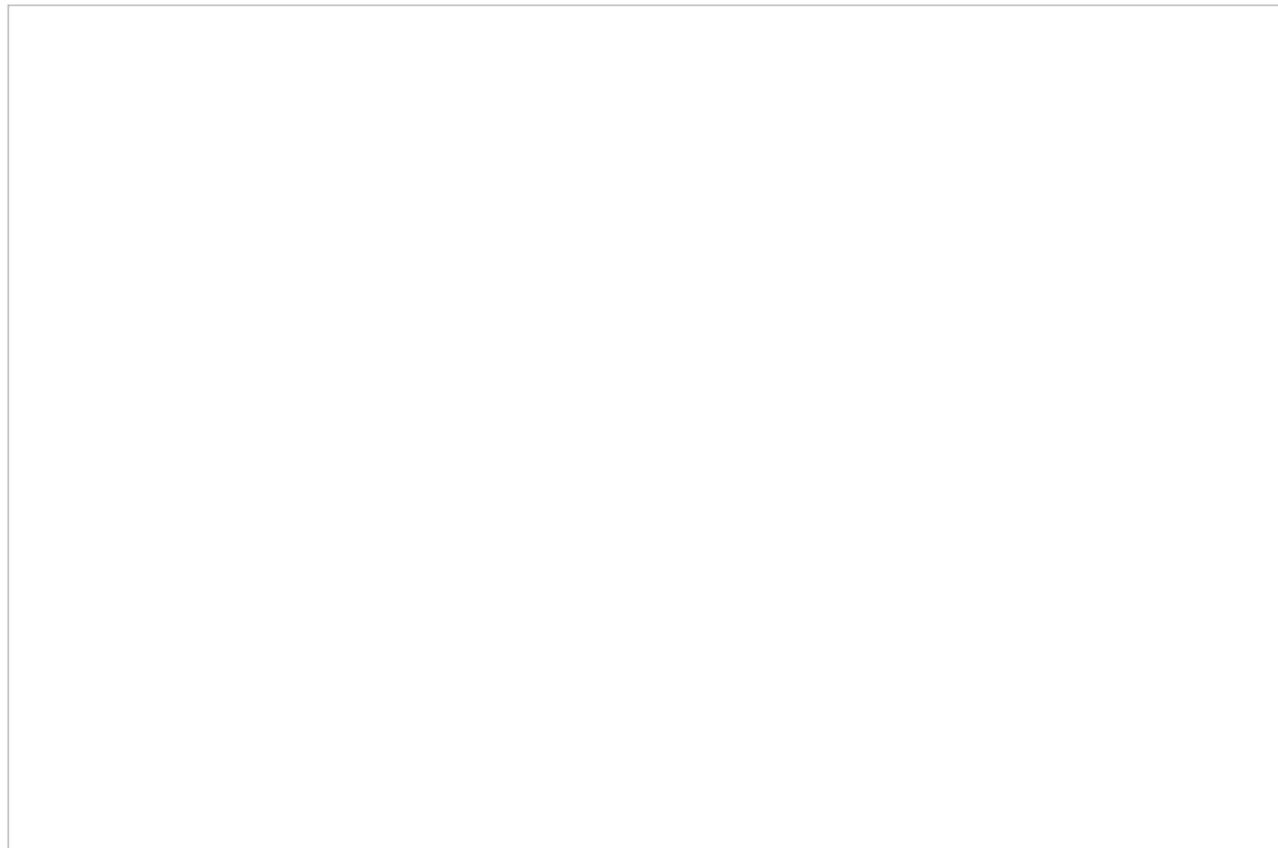
Audio Treatments

Audio treatments are prerecorded audio signals (tones, music, or messages) that the system plays to the listener in specific situations, such as when a call is waiting in queue or on hold. Bright Pattern Contact Center provides default audio treatments for all such situations. You can replace these default treatments with your own custom treatments.

To listen to the current treatments or to replace them with custom treatments, select the **Audio Treatments** option of the **Call Center Configuration** menu.

Select the situation for which you wish to use your custom audio treatment. You can click the audio icon to listen to the currently used message. To replace the current treatment with your new custom treatment, click **upload** and select the desired voice file. The audio content must be encoded in uncompressed PCM A-law or μ -law 16-bit format.

Note that instead of replacing these tones altogether, you can adjust the volume of the existing tones. To do so, click the audio icon, **download** the corresponding audio files, use a third-party audio-editing application to adjust the volume, and **upload** the modified file back into the system.



Screen Properties

The *Audio Treatments* screen properties are described as follows:

Hold and queue music

Hold and queue music is the audio that is played to the party currently waiting on hold or in queue. For specific queues, this signal can be redefined at the scenario level. See the description of the [Find Agent](#) block in the *Scenario Builder Reference Guide*.

Call in queue notification

Call in queue notification indicates that there is a service call waiting in queue. This notification can be provided to agents with matching skills who are currently in the [After Call Work](#) state. Note that this message will be played only if enabled as part of [service configuration](#).

Use the **repeat every** setting to define how often this notification will be played.

Internal chat notification

Internal chat notification indicates the arrival of an [internal chat interaction](#).

External chat and preview record notification

This notification indicates the arrival of an [external chat interaction](#). This signal is also used to indicate the delivery of a [preview record](#) for outbound campaigns.

Use the **repeat every** setting to define how often this notification will be played until the interaction is accepted.

New chat message notification

When enabled, this notification tone will notify agents about the arrival of every new chat message within their established chat sessions.

Note: This setting enables playback for agents only. If you want your customers to receive an audio notification upon arrival of chat messages from agents, you should enable this capability in the code of your [mobile chat applications and/or web HTML snippets](#).

DTMF suppression sound

This is the sound that the agents will hear instead of the actual DTMF for the calls via dial-in scenario entries where the DTMF Suppression Function is [enabled](#). In a multi-party call where there can be multiple agents and multiple external parties, only agents are isolated. Any participant on a call without a user_id may hear the DTMF digits. The user_id is isolated in order to support agents logged in on external numbers (trunk calls) as well as on nailed connections.

Note: For the calls where DTMF was suppressed in the above manner, their voice recordings will also contain the DTMF suppression sound instead of actual DTMF tones.

While logged on external phone

You can redefine the three signal tones that the agents hear when using an external phone (i.e., when they log in with the [phone device option](#) *An external phone* or *Dial-in and keep line open*):

- **incoming call** – Equivalent to ringing tone
- **call waiting - incoming call while talking** – Indication of another incoming call while talking
- **line idle** – Indication that current active call is terminated

While logged on a softphone

You can redefine the following two signal tones that the agents hear when using a softphone (i.e., when they log in with the [phone device option](#) *Softphone with computer headset*):

- **incoming call** – Ringing tone
- **call waiting - incoming call while talking** – Indication of another incoming call while talking
- **call end notification** - When enabled, this sound indicates that the call has ended
- **call on hold end notification** - When enabled, this sound indicates that the call is no longer on hold

Shared Voice Segments

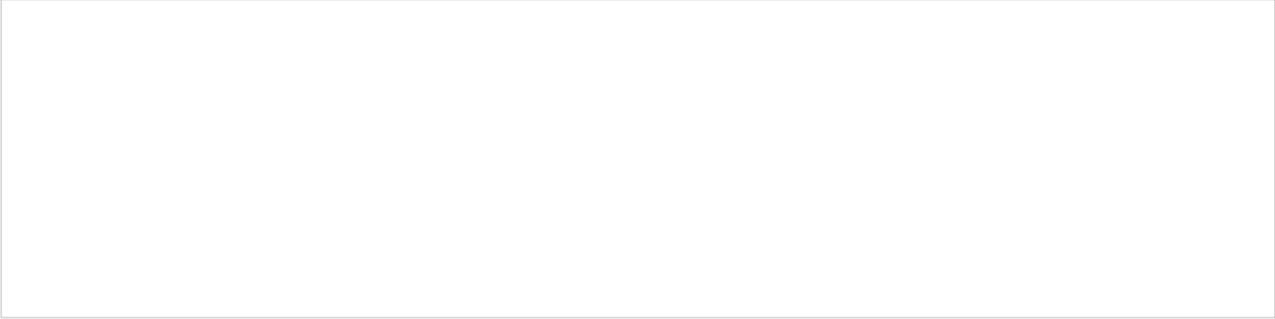
Many contact center functions rely on voice messages that are prerecorded and played back to customers in various situations. For example, inbound call processing typically starts with an interactive voice response script that greets the callers, prompts them to select specific services, and provides information, such as business hours. In outbound campaigns, voice messages can be used to announce the purpose of the call and offer opt-out options.

You can upload the related voice messages directly into the corresponding scenario blocks. However, if your contact center has many different scenarios that use similar voice prompts and announcements, it may be more convenient to define their common parts externally, and then use them in specific scenarios. Such externally defined voice messages are called *shared voice segments*.

Shared voice segments can be either prepared and uploaded as voice files or recorded over the phone. The latter is convenient when a message may have to be updated in response to some unplanned events (e.g., insurance services responding to a natural disaster) or when a message has been recorded by an external party (e.g., a political campaign).

Note that if your contact center provides services in several languages, you may need to provide the same voice segment in all those languages. Voice messages in different languages with the same meaning are treated as one logical shared voice segment.

To create and edit shared voice segments, select the **Shared Voice Segments** option from the **Call Center Configuration** menu.



Call Center Configuration > Shared Voice Segments

Configuring a New Voice Segment

To configure a new voice segment, click + and enter its unique *Name* in the *Properties* tab. Subsequent configuration depends on the method you choose to record the message.

If you have a segment prerecorded as a voice file:

1. Click **add**.
2. Select the **Language** in which the voice message is recorded.
3. Provide a **Description** of the message (e.g., the text of the message itself).
4. Click **upload** and select the voice file with the message. (Note that the message must be encoded in uncompressed A-law or μ -law PCM 16-bit format and the maximum size of the file is 20 MB.)

You will see the voice message identified by its language and description in the list. Repeat these steps for the same message in other languages. You can use the mouse-over operation to edit or delete specific voice messages within the segment.

If your voice message will be recorded over the phone:

1. Click **Apply** to save the voice segment.
2. Create a voice scenario that uses the *Record* block for recording of voice messages over the phone.

For more information, see the description of the [Record](#) block in the *Scenario Builder Reference Guide*. Note that Bright Pattern Contact Center also provides a [scenario template](#) called *Voice Prompt Recording*, which you can customize for your purposes.

Using a Shared Voice Segment in a Scenario

To use a shared voice segment in a specific prompt of your scenario, set the [voice segment type](#) to *Shared Voice*, and select the desired segment.

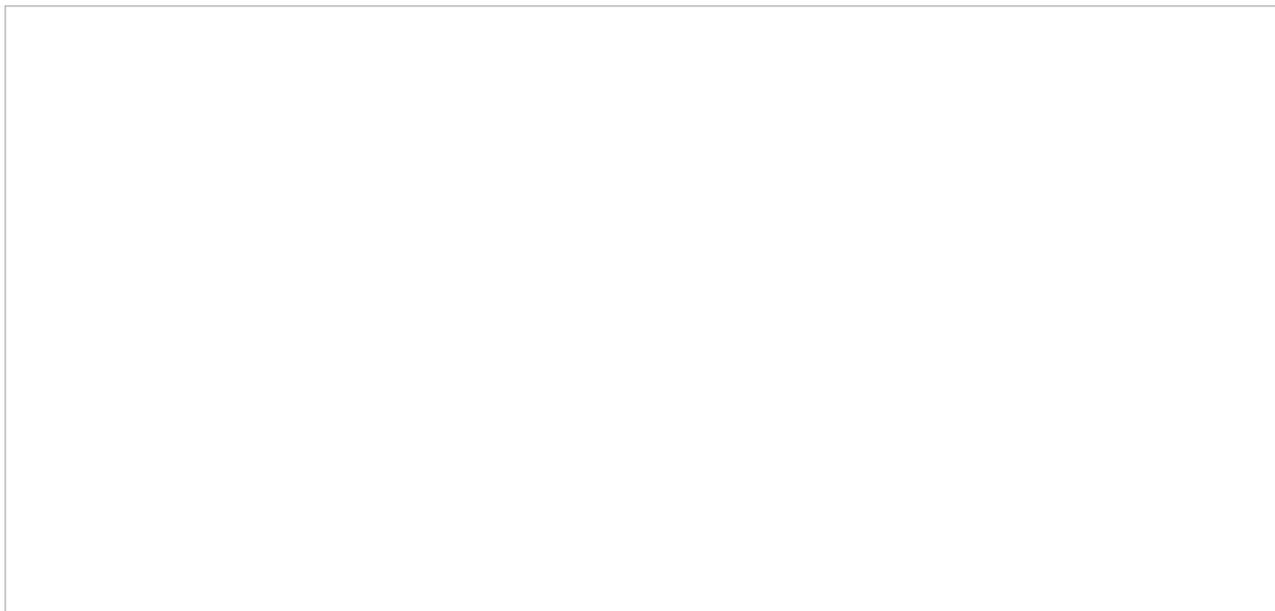
Shared voice segments can also be used as prerecorded (canned) messages that agents can play to the customers directly from their desktops. Such segments must first be [assigned to the services/campaigns](#) where they can be used. When assigned, the segments will appear in the [prerecorded message menu](#) of the Agent Desktop application when the agent handles calls associated with the corresponding service/campaign.

To see the scenarios and services where the selected shared voice segment is currently used, click the *Associations* tab.

Voicemail

Bright Pattern Contact Center supports voicemail functions. For more information about Bright Pattern Contact Center voicemail, see sections [Configuring Your Voicemail](#) and [Listening to Voicemail Messages](#) of the *Bright Pattern Contact Center Agent Guide*.

To configure general (system-level) voicemail settings, select the **Voicemail** option from the **Call Center Configuration** menu. Personal email settings are configured via the [Users](#) menu of the Contact Center Administrator application and/or [User Profile](#) settings of the Agent Desktop application.



Call Center Configuration > Voicemail

Screen Properties

The *Voicemail* screen properties are described as follows.

Voicemail forwarding timeout

This is the default timeout for forwarding of unanswered calls to voicemail. The default value is 15 seconds. Users can redefine this timeout via their individual profile settings.

Voicemail scenario

Voicemail scenario indicates which scenario should be used for the voicemail function. The *Default* scenario is built-in and is configured using the remaining settings on this screen. The default scenario provides a generic voicemail function that should be sufficient in most cases. For complex voicemail functions (e.g., different content of the email notification depending on the type of call), you can define a different scenario that can use any number of [Voicemail](#) blocks configured for various conditions.

Prompt for “user at extension” message

This setting can be changed for the *Default* voicemail scenario only (see above).

The prerecorded default greeting is in English and sounds like this: *The user at extension [user's extension number] is not available. At the tone, please record your message.*

Use this setting to modify the segment of this greeting that comes before the extension variable.

Note that users can record [personalized greetings](#), which will be applied instead of this default greeting when someone tries to reach them in their absence.

Prompt for “is not available...” message

This setting can be changed for the *Default* voicemail scenario only (see above).

Use this setting to modify the segment of this greeting that comes after the extension variable in the prerecorded default greeting (see above).

Use secure voicemail

This setting can be changed for the *Default* voicemail scenario only (see above).

Voicemail notifications are delivered to users via email. By default, voicemail messages are attached to those emails as audio files and can be played back via any standard media player. If you select this checkbox, the voicemail messages will be stored encrypted in the system and the emails will instead contain a link that will require authentication prior to message playback. For more information, see section [Listening to Voicemail Messages](#) of the *Agent Guide*.

Note that any user registered in the system will be able to listen to the voice message upon clicking the link and logging in. This capability is essential to enable message recipients to forward some of their voicemail to other users. If you wish to ensure that only the original recipients can access their voicemail, create a different voicemail scenario with option [Allow only this user](#) enabled.

From display name

This setting specifies the display name of the email sender. This setting can be changed for the *Default* voicemail scenario only (see above).

From address

This setting specifies the email address of the email sender. This setting can be changed for the *Default* voicemail scenario only (see above).

Subject

This setting specifies the subject line of the email. The *Subject* setting can be changed for the *Default* voicemail scenario only (see above).

Message

This setting can be changed for the *Default* voicemail scenario only (see above).

The text to be sent as a message body. If the email notification contains an access link (as opposed to an audio file attachment), the link should consist of your Agent Desktop URL and variable $\$(URL_SUFFIX)$. For example: [http://abc-insurance.my-service-provider.com/\\\$\(URL_SUFFIX\)](http://abc-insurance.my-service-provider.com/\$(URL_SUFFIX)). To insert and edit default message body text, click **default**.

Call Recording and Monitoring

Call recording and monitoring settings are configured in *Quality Management > Call Recording and Monitoring* in the Contact Center Administrator application.

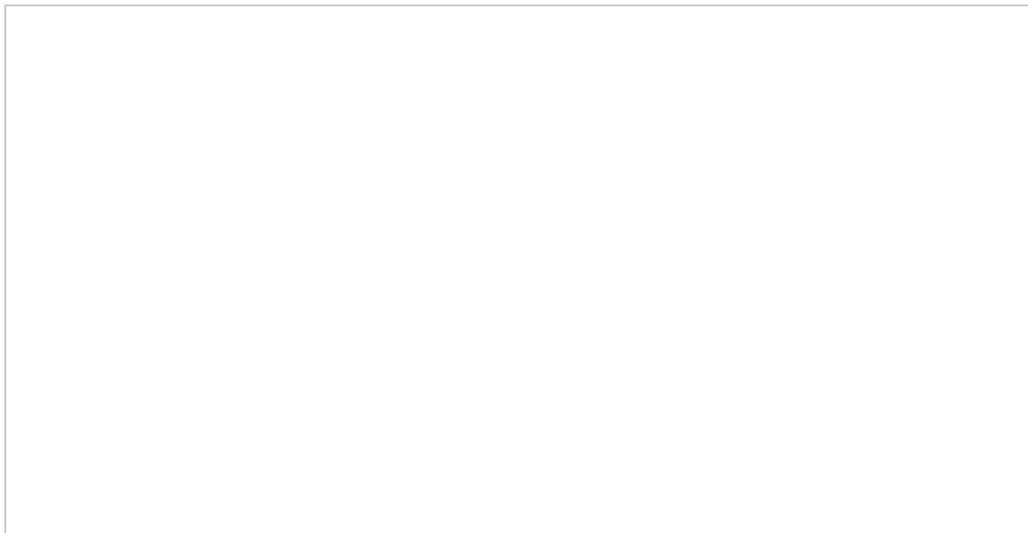
Voice recordings can be subsequently played back via:

- Contact Center Administrator, in the Interaction Record (requires privilege "Listening to all call recordings and view all chat transcripts" or "Listening to call recordings and view chat transcripts on services" in reviewer role; the latter is typically used for BPO client access).
- Agent Desktop, in the contact's Activities (requires privilege "Listen to call recordings and view chat transcripts on assigned services" or "Listening to own call recordings and view own chat transcripts").

Voice recordings can also be exported to an external storage.

Note: [Call Recording](#) is enabled automatically when a supervisor begins [monitoring](#).

Settings



Call Recording and Monitoring settings

Call Recording

Select the record calls checkbox to enable call recording. If this property is checked, all voice calls will be recorded (inbound, outbound, and internal).

The GSM codec is used for calls recordings.

Please note that this configuration setting can be overridden by the following actions (listed in the order from least to most powerful):

- Configuration settings for a specific service
- Configuration settings for a specific user
- Value of scenario variable *\$(doNotRecord)*
- Manual pause/resume recording commands by Agent/Supervisor
- Automatic recording when a call is monitored
- Presume recording using corresponding desktop API methods
- Value of scenario variable *\$(banVoiceRecording)*

If a call is transferred, the call recording state is determined by the highest level override present in the main or consult call after transfer. If two or more calls are merged into a conference, the call recording state is determined by the highest level override present in any merged call. Once recording is manually started via API, it can be stopped by only API call or by setting the *\$(banVoiceRecording)* variable. Adding or removing services or other users would not stop the recording started by API.

Play monitoring notification

Select the checkbox for either **to agent** or **to customer** to specify who should hear the monitoring notification.

Monitoring prompt

The *Monitoring prompt* is the sound or other audio message that will be used for the monitoring notification. Click **upload** to add a voice file (in WAV format).

Play notification tone periodically

When call is recorded

Select the checkbox for either **to agent** or **to customer** to specify who should hear a tone when a call is being recorded.

When call is monitored

Select the checkbox for either **to agent** or **to customer** to specify who should hear a tone when a call is being monitored.

Periodic Monitoring or Recording prompt

The *Periodic Monitoring or Recording prompt* is the sound or other audio message that will be used as the notification tone. Click **upload** to add a voice file (in WAV format).

period, sec

Period, sec is the period of time (in seconds) to wait before playing the periodic monitoring or recording prompt again. For example, specifying 10 seconds here causes the periodic monitoring or recording prompt to be played every 10 seconds.

Stop recording of outbound calls

For voice services, you can discontinue call recording upon transferring a call to an external number.

Instances in which you may not want to record calls include when:

- Customers require calls not to be recorded after transfer to an external number.
- Customers require just the consult portion of the call to be recorded in order to have reference data for the

agent.

- Agents must not record calls when transferring to a specific agent.

Stop recording of an outbound call after the last agent leaves

This selection allows an agent to make a consult call to a public switched telephone network (PSTN) destination (i.e., an external phone number), complete the transfer, and have the call recording continue if the agent's call was recorded. The call will not be recorded once the agent leaves.

Continue recording of the calls transferred outside

This selection specifies that the call will be recorded even after transfer.

except when calling the following numbers

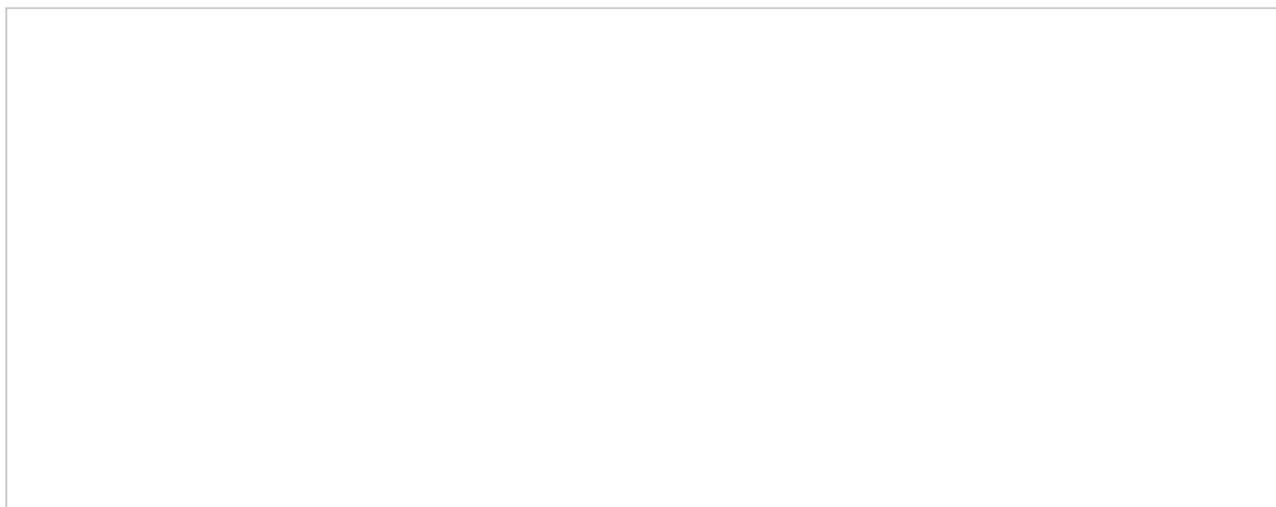
To create exceptions to your call recording/stopping selections, click **add**. Adding phone numbers allows you to stop recording when transferring to specific clients, as well as to stop call recording after transfer on a per-service basis.

The default value is to stop recording. If you want recording to continue upon transfer, you must make your selection from *Call Recording*.

Grading Categories

In contact centers, quality management refers to the process of evaluation of agent performance based on review of call recordings, chat transcripts, and email replies. You can define up to 10 different categories of evaluation. These categories will be available to contact center personnel during the interaction review process. For more information, see chapter [Quality Management](#) of the *Bright Pattern Contact Center Reporting Reference Guide*.

To view and edit evaluation categories, select **Grading Categories** from the *Quality Management* menu.



Bright Pattern Contact Center provides a set of default categories. To change a default category, hover over it and click **EDIT**.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making a change to grading categories and evaluation areas, we recommend that all affected logged-in agents refresh their browser page.

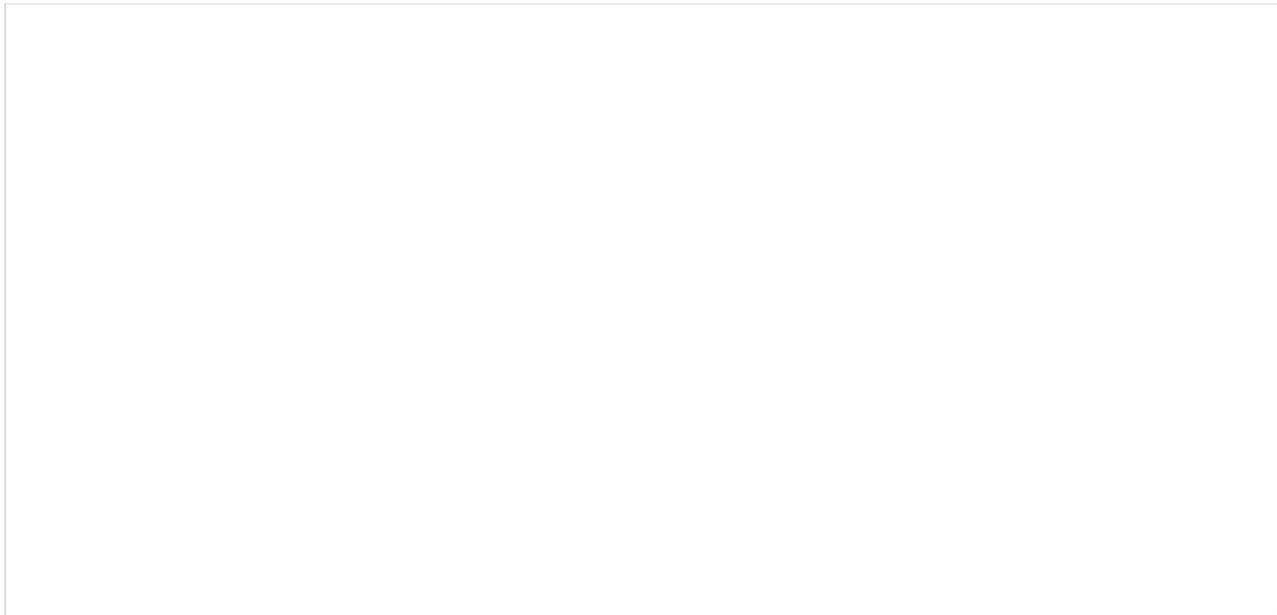
Calendars

Unless all services of your contact center operate on a 24/7 basis, you will have to define separately what happens to incoming interactions when the corresponding services are open for business and when they are closed. You can define service operation hours when you configure your [services](#) or [scenario entries](#). However, if your contact center has many different services, and some of them operate on the same schedules, it may be more convenient to define such schedules externally first, and then assign them to services and/or scenario entries. In this way, if you need to change a service operation schedule, you do it once, and the change will automatically apply to all services associated with this schedule.

Creating an external schedule involves two steps. First, you create calendars (i.e., define the days that are supposed to have the same hours of operation, such as Monday through Friday or public holidays). Calendars are discussed in this section. After that, you create the schedule itself by combining the different calendars and specifying hours of operation for each assigned calendar. Such complete schedules are discussed in section [Hours of Operation](#). Note that the calendars are also used for defining [calling hours](#) of outbound campaigns.

Note: The system provides a number of predefined calendars that include a typical work week, weekends, and US holidays. The latter can be used for defining [state calling hours](#). The default holiday information is current as of the release of version 3.6 of the Bright Pattern Contact Center system (June 2014). It is recommended that you periodically check the federal and state legislation regarding holidays, and update the calendars as may be necessary.

To work with calendars, select the *Calendars* option from the *Call Center Configuration* menu.



Call Center Configuration > Calendars

Screen Properties

The *Calendars* screen properties are organized into two tabs: Day types and Associations. The screen properties for both are described as follows.

Day types tab

Name

Name refers to the calendar name. This field is mandatory and must be unique within the contact center.

Days

These are the *days* within this calendar. Note that all days within a calendar are supposed to have the same hours of operation.

To add a day to the calendar click **add**. Select the recurrence pattern from the drop-down menu and provide the necessary data. For example, for the US Labor Day holiday, select **day of Nth week** and provide **1st, Monday, and September**.

To remove or edit calendar days, hover the cursor over their names.

clone

This option allows you to define a new calendar based on the currently selected one. When you click **clone**, a copy of the currently selected calendar is created with default name *Copy of [Calendar Name]*. You can change the calendar name, as well as add days to, or remove them from, or edit them in, this new calendar.

Associations tab

Services

Services lists the [services](#) that use the given calendar. Select a service from the list to see the service definition.

Hours of operations

This property lists the [hours of operation](#) (HOPs) that use the given calendar. Select a schedule from the list to see the schedule definition.

Inbound Voice and Chat Service Configuration

This section outlines the recommended general order of configuring an inbound voice or chat service.

For inbound voice services with virtual queuing (callback option), see also Bright Pattern's [Virtual Queue Tutorial](#).

The following steps suggest the order of actions that you should take when configuring an inbound voice or chat service for your contact center.

Step 1: Create and configure an inbound voice or chat service

Create an inbound voice or chat service, and configure its general settings. See section [Services and Campaigns - Properties Tab](#).

Step 2: Assign teams to the service

Assign agent teams to this service. Note that the service will be created with a default service skill that can be assigned automatically to all members of the associated agent teams. See section [Services and Campaigns - Assignments Tab](#).

Step 3: Create additional skills required for this service

Additional skills are called [auxiliary skills](#). Add any other required agent skills for this campaign.

Step 4: Assign the additional skills to agents of the assigned teams

Assign auxiliary skills to agents as required [skill levels](#).

Step 5: Specify service level thresholds

Set the service level threshold for the service. See section [Services and Campaigns - Service Level Tab](#).

Step 6: Create the scenario for the service

Create the interaction processing [scenario](#) for this service. For voice, use text-to-speech to generate the voice messages and prompts, and once they are finalized, record them with a voice talent.

Step 7: For voice, specify dial-out information

For voice services, specify the [dial-out entries](#) for outbound consultation calls.

Step 8: For voice, set up periodic call recording exports

For voice services, set up periodic exports of call recordings. See section [Services and Campaigns - Results Tab](#).

Step 9: For chat, update omnichannel routing settings

For chat services, specify the number of sessions that agents can handle simultaneously. See section [Omnichannel Routing](#).

Step 10: For voice, configure caller ID

For voice services, configure a caller ID for outbound SMS communications. See section [Services and Campaigns - Numbers Tab](#).

Step 11: For chat, configure SMS access numbers

For chat services, configure an SMS access number for inbound SMS communications. See section [Messaging](#).

Step 12: Associate scenarios

Associate a scenario with the access number (for voice) or web/mobile applications (for chat). See section [Scenario Entries](#).

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Outbound Campaign Configuration

This section outlines the recommended general order of configuring an outbound campaign. Note that for campaign configuration, the Contact Center Administrator application provides a diagnostics page that you can use to verify the correctness and completeness of your campaign configuration. For more information, see section [Outbound - Diagnostics](#).

For quota-based campaigns, refer to the Bright Pattern Contact Center [Outbound Quota Tutorial](#).

The following steps suggest the order of actions that you should take when configuring outbound campaigns for your contact center.

Step 1: Import and configure calling lists

Import the calling [lists](#) for your contact center's outbound campaigns. Lists contain the contact data (i.e., name, phone number, etc.) that is needed to dial contacts in your campaign.

Step 2: Import and configure Do Not Call lists

[Do Not Call Lists](#) are separate lists of contacts that should never be called.

Step 3: Review, and, if necessary, update state calling hours

Refer to section [State Calling Hours](#).

Step 4: Create an outbound or blended service (campaign) and configure its general settings

Create and configure the general settings for outbound services or campaigns. See section [Services and Campaigns - Properties Tab](#).

Step 5: Assign agent teams to the campaign

Refer to section [Services and Campaigns - Assignments Tab](#) to assign teams to the campaign. Note that the campaign will be created with a default skill that can be assigned automatically to all members of the associated agent team(s).

Step 6: Create additional skills required for the campaign

Additional skills are called [auxiliary skills](#). Add any other required agent skills for this campaign.

Step 7: Assign the auxiliary skills to agents of the assigned teams

Assign auxiliary skills to agents as required [skill levels](#).

Step 8: Assign campaign operators to this campaign

Assign campaign operators. See section [Services and Campaigns - Assignments Tab](#).

Step 9: Review and edit dispositions

Review and edit the default dispositions (i.e., [pre-defined dispositions](#)) and define additional dispositions as may be necessary to analyze the results of your campaign. See section [Services and Campaigns - Dispositions Tab](#).

Step 10: Associate the calling lists with the campaign

The callings lists that you imported or added in [Step 1](#) of this procedure need to be associated with the campaign. Then, configure the lists for use within the campaign, and enable them when they are configured. See section [Services and Campaigns - Lists Tab](#)

Step 11: Define scenarios

Define the interaction processing scenarios that may be needed for automatic processing of answered campaign calls and possible callbacks within this campaign. See section [Voice Scenarios](#).

Note that scenario templates are available for some typical outbound processing automation tasks, such as right-party connect (RPC) and the opt-out option for calls unanswered within the compliance time.

Step 12: Create activity forms

Create the activity forms that the agents will use to process campaign calls, and bind them to the calling list data. See section [Activity Forms](#) and [Services and Campaigns - Activity Tab](#).

Step 13: Add access numbers

Decide which [access numbers](#) will be used as caller IDs for this campaign, and, if necessary, associate these numbers with scenarios for possible callbacks.

Step 14: Configure campaign caller IDs

Set up the caller IDs to be used for the campaign. See section [Services and Campaigns - Numbers Tab](#).

Step 15: Configure campaign settings

Configure all campaign-specific settings, including campaign type, general schedule, estimated success rate, calling hours, dial rules, and *Do Not Call* lists. See section [Services and Campaigns - Outbound Tab](#).

Step 16: Verify the completeness of campaign configuration

Verify that campaign configuration is correct on the campaign's [Outbound - Diagnostics](#) page.

Step 17: Set up periodic export of campaign results and recordings

If you want campaign results and recordings to be exported automatically at select times, enable periodic exports in the [Services and Campaigns - Results Tab](#).

Step 18: Enable the campaign

Your outbound campaign is active when you enable it. See section [Outbound - General](#).

Email Service Configuration

This section outlines the recommended general order of configuring email services associated with a particular email address.

Step 1: Add or edit an email service

Plan the categorization of email interactions arriving at a particular email address, create the corresponding email services, and configure their general settings. See section [Services and Campaigns - Properties Tab](#).

Step 2: Assign teams to the email service

Assign agent teams to the selected email service. Note that each service will be created with a default service skill that can be assigned automatically to all members of the associated agent teams. See section [Services and Campaigns - Assignments Tab](#).

Step 3: Create a standard acknowledgment message

Create the acknowledgment message that will be sent to customers automatically to confirm receipt of their email inquiries. See section [Knowledge Base](#).

Step 4: Define service settings

Define all email-specific service settings. See section [Services and Campaigns - Email Tab](#).

Step 5: Create Knowledge Base articles

Create articles in the [Knowledge Base](#) that will help agents process emails associated with the above services more efficiently.

Step 6: Create the header and footer

Create the mandatory messages that will be inserted automatically in the [email header and footer](#). This text is placed above and/or below the main text of every email that is sent to a customer.

Step 7: Specify omnichannel settings for emails

Specify the number of emails that agents can have in active processing on their desktops simultaneously. See section [Omnichannel Routing](#).

Step 8: Give agents the privilege to handle email

Make sure the agents who will process email have the privilege *Handle email* granted to them. See section [Roles](#).

Step 9: Create an email scenario entry

Create an [email scenario entry](#) for the given email address and then configure its account settings, default service, and categorization/prioritization rules.

Step 10: Configure an outbound email account (optional)

If, within this service, you intend to send outbound emails that are not related to any existing cases, configure an outbound email account for this service. See section [Services and Campaigns - Properties Tab](#) and section [Scenario Entries - Email](#).

