5.3 Glossary

Bright Pattern Documentation

Generated: 12/06/2021 3:26 pm

Table of Contents

1. REDIRECT 5.3:Contact-center-administrator-guide/Directory/AccessNumbers

1. REDIRECT 5.3:Agent-guide/Tutorials/Calls/HowtoWrapUpAfter-callWork

1. REDIRECT 5.3:Contact-center-administrator-guide/CallCenterConfiguration/Omni-ChannelRouting

1. REDIRECT 5.3:Agent-guide/Tutorials/States/HowtoInterpretYourCurrentStateInformation

1. REDIRECT 5.3:Contact-center-administrator-guide/CallCenterConfiguration/AudioTreatments

1. REDIRECT 5.3:Contact-center-administrator-guide/ServicesandCampaigns/Outbound-General

1. REDIRECT 5.3:Contact-center-administrator-guide/CallCenterConfiguration/AuxiliarySkills

1. REDIRECT 5.3:Contact-center-administrator-guide/QualityManagement/CallRecording

1. REDIRECT 5.3:Contact-center-administrator-guide/UsersandTeams/Privileges

1. REDIRECT 5.3:Contact-center-administrator-guide/UsersandTeams/Privileges

1. REDIRECT 5.3:Agent-guide/Tutorials/States/HowtoInterpretYourCurrentStateInformation

1. REDIRECT 5.3:Contact-center-administrator-guide/CallCenterConfiguration/Calendars

Overview

The Bright Pattern Contact Center *Virtual Queue Tutorial* explains Bright Pattern's virtual queue option, how to configure it, and how enabling it can affect reporting statistics.

Virtual Queuing, also referred to as the *Callback Option*, is an enhancement of the regular automatic call distribution method (ACD) used in inbound call centers. During periods of significant wait times, this option allows customers to hang up the call while keeping their position in the service queue and to receive a callback when it is their turn to be connected to an agent. The benefits of using virtual queuing include:

- **Improved customer satisfaction** – After requesting a callback, customers get back to their normal activities instead of being tied on the phone.
- **Reduced abandonment rates** – Customers who can continue their normal activities are less likely to abandon their service requests (i.e., to ignore the callback).
- **Reduced talk time** – Customers waiting in a virtual queue are less likely to spend any time venting their frustration with a long wait when they are finally connected to an agent.
- **Lower telco costs** – Customers waiting in a virtual queue do not occupy physical voice channels.

An agent receiving a callback reservation notification

How It Works

Bright Pattern Contact Center *Virtual Queue* works in the following way:

For each incoming service call, the system calculates its estimated waiting time (EWT) in the queue. If this time exceeds a threshold EWT value preconfigured for the given service, the system notifies the calling customer about the wait time and offers the customer the option of receiving a callback when it is the customer's turn to be connected to an agent. The customer can request the callback to be made to the phone from which the customer is calling, or to a different number that the customer can enter using the phone keypad. The original live call is then disconnected while the customer’s position in the service queue is maintained by the system as if the customer had remained on the line, hence the name *Virtual Queuing*.

When it is the customer’s turn to be connected to an agent, the system makes an outbound call (callback) to the designated callback number. Upon answer, this call is connected to an available agent.

Initiation of the callback may be done either on prediction that an agent will become available around the expiration of EWT calculated for the given call or via explicit agent reservation.

When agent reservation mechanism is used, the system will wait for an agent to become available before making a call. When the agent becomes available, she is reserved for the given call. The agent is then notified by a pop-up window that she has been reserved for a callback; this window includes the optional checkbox **Dont's show this to me again** should she not want to see the pop-up on future callback reservations.

The incoming callback reservation window

While explicit agent reservation guarantees agent availability to take a callback, it is less efficient in terms of agent utilization as agents will have to spend some time in a reserved state; it can be recommended for services with small numbers of agents where EWT calculation is usually less precise.

When the EWT-based mechanism is used, the callback attempt is made a few seconds before EWT expiration based on the prediction that an agent will have become available by the time the callback is answered by the customer. If an agent does not become available at that time, the answered call is placed in the first position in the service queue to be connected to the next available agent. An interactive voice response (IVR) announcement can be played for the answered callback to prevent the customer from hanging up a call if it cannot be immediately connected to an agent.

Generally, for services with larger pools of agents, the EWT-based mechanism will reliably connect answered callbacks to agents without compromising their utilization.

Subsequent processing of answered callbacks delivered to agents is no different from the processing of calls waiting in the queue.

Lists

Lists contain destination data for automated outbound dialing. Each list record provides information about a single destination, and typically includes customer's name, at least one telephone number, and other information specific to the dialing purpose. For example, lists used in a satisfaction survey campaign may include information about products purchased by the customers. Lists are used in outbound and blended services as discussed in section Services and Campaigns - Lists Tab.

List data is deleted from the calling list database automatically when the

- corresponding list object is deleted from configuration
- list is updated with new content via periodic import with the update policy set to *replace list data*

To work with lists, select the **Lists** option from the root menu. To import and configure a new list, click the button with the "+" sign. A list import wizard will open.

List import wizard

List Import

The list import wizard screens and properties are described as follows.

List Type screen

List type screen

Select list type

Select the method that will be used to import data to this list: a file or Salesforce.com query. For the latter, you must have a Salesforce.com integration account configured in your system.

For detailed instructions on importing data from a Salesforce.com application see section Importing Calling Lists and Exporting Campaign Results of the *Salesforce.com Integration Guide*.

Name and Source screen

Name and Source screen

Data source

Data source is the source of data for this list. To upload a file from a local source, select **Upload**, click **Browse**, and select the data file. You can use results of previous campaigns, filtered by disposition if necessary, as the source of your list data.

To obtain data from an external source, select the transfer protocol (*FTP* or *SFTP*), and specify the address (URL), *Username*, and *Password*.

Note that only plain text list files (.CSV or fixed width) are supported as sources for list data. This setting is specified for list type *File* only.

List name

The list name is mandatory and must be unique within the contact center. The name of the selected data source is offered as the default name.

List format

If you want the format of a list to be based on the format of one of the previously imported lists, select the desired *list format* from the drop-down menu. Using an existing list format can save you time while going through the subsequent import steps, especially the *Fields* wizard screen.

If you need to review the desired format before assigning it, close the wizard, locate the desired format in the *Format* column of the list view, select the corresponding list, and click the **view** link in the **Properties** tab.

Note that if you select an existing list format but decide to introduce some changes for the imported list (e.g., change some field names), then upon completion of the wizard, you will be prompted to save these changes as a new format.

If you wish to create a new format using the layout of the imported list, select**Create new format**. This setting is specified for list type **File** only.

Salesforce.com integration account

The Salesforce.com integration account is what will be used to obtain Salesforce.com data for this list. This setting is specified for list type Salesforce.com only.

SOQL query to select object for list

Use this field to specify the query for selecting Salesforce.com records for this calling list. The query must be written in the Salesforce Object Query Language (SOQL). Note that the records must contain object identifiers and have at least one phone number.

This setting is specified for list type Salesforce.com only. Note that there is a 30 second timeout on the Bright Pattern Contact Center side to begin receiving data from SFDC after the SOQL query is submitted.

Format Type screen (for list type *File* only)

Format Type screen

Delimited

Select *Delimited* if a character, such as comma or tab, separates each field in the imported data

First line contains field names

Select this checkbox if the first line of the imported data appears to contain column headings. Field names are case insensitive starting from version 3.13. This means field names that differ in case only refer to the same field.

Fixed width

Select this option if fields of the imported data appear to be aligned in columns with spaces between each field.

Input file encoding

The *Input file encoding* option lets you select the encoding used by the source file. Initially, the UTF-8 encoding is assumed by default. If you select another encoding during a list import, the selected encoding will become the new default for subsequent list imports.

Format Options screen (for list type *File* only)

Format Options screen

Delimiter

Select the character that is used to separate each field in the imported data. If the delimiting character is anything other than the comma, tab, or semicolon, use the **Custom** option to specify the character. When the correct delimiter is selected, the preview should show the imported data arranged as a table.

Fields screen

Fields screen

Do not import field (skip)

This field indicates whether the selected field is to be imported. Select this checkbox if the data in the selected field is not essential for any contact center operations (i.e., will not be used for dialing, analyzed in a scenario, or displayed for agents) and does not need to appear in campaign results.

Type

Specify the *type* of data that the selected field contains. If the type of data is anything other than the data types predefined in the drop-down menu, select *Other*. Note that at least one field of the imported list must have type *Phone*.

If the first row of the imported data contains column names, the wizard will try to automatically set field types according to matching column names (e.g., a column titled *State* will be set to field type *State*). You should review all name-type pairs to make sure the mapping is correct.

Possible uses of the available field types are described as follows.

Account

Account can be used for a field that contains a customer identifier. If defined, the value from this field will be stored as part of the history of all calls initiated by the corresponding calling record and can be used as a selection criterion in interaction record search. Unique account numbers can also be used as calling record keys (see below). A list can have only one field of this type.

Agent Login ID

Agent Login ID can be used to assign list records to specific agents. This may be useful, for example, for proactive contacts within established business relationships where clients might expect/prefer to be contacted by business representatives that they are familiar with. Note that such personal record assignments are used in preview campaigns only. When a list with records assigned to specific agents is used in apredictive, progressive, or automatic/IVR campaign, all such assignments will be ignored.

Caller ID

If calling records contain numbers that should be displayed as caller IDs when dialing corresponding records during campaigns, use the field type *Caller ID* for the field that contains these numbers. Use of these numbers as Caller IDs for a particular campaign is enabled by the campaign's Caller ID settings (option *From list field of type “Caller ID”, otherwise default*). Note that your service provider may or may not allow use of arbitrary caller ID numbers for your outgoing calls. If use of arbitrary caller IDs is not available to you, the number specified in the calling record will be used only as a caller ID if it matches one of the access numbers assigned to your contact center; otherwise, the specified default number will be used. When using this field to specify caller IDs for your campaign, be sure to check all legal requirements and restrictions for what can be sent as a caller ID in the jurisdictions where you operate.

Company

Company can be used when calling record contains a company name.

Date/Time

If the calling list is based on customers’ callback requests (opt-in callback list), your local telemarketing regulations may require that such callbacks are made within a specific number of days. In this case, the imported list will typically have information about when the callback request was made. Use the field type *Date/Time* for this information. Fields of the *Date/Time* type cannot be used to set campaign quotas.

Date/Time - schedule call at

Date/Time - schedule call at can be used to provide, during list import, information about when this record needs to be called. It can be used to define the exact moment of time when this record needs to be attempted.

Note that the call will happen as close to the specified date and time as possible; the system will make the best attempt. Safe calling hours are not ignored. If the date and time are in the past at the time of list load, the field contents are ignored.

Encrypted data

Encrypted data can be used to store sensitive information that must be stored encrypted and only be presented in clear text to the agent who will be processing the record in case of a successful call attempt. Note that the encrypted data cannot be not automatically processed by the system, and thus, may not include any information used for campaign automation, such as phone numbers, zip codes, states, or any information that is used to set campaign quotas. If you do not see the **Encrypted data** field type, the data encryption function is not enabled for your contact center by the service provider.

First name

First name is the person's first name.

Integer

Integer is intended for fields with semantically numeric data (e.g., person's age or account balance) that may be used to set a campaign quota.

Last name

Last name is a person's last name.

Other

Other can be used for fields that do not fall into any specific field type uses outlined here.

Phone

Phone should be set for fields with phone numbers that may be dialed during a campaign. A list must contain at least one field of this type.

Postal code

Postal code is a person's postal code. This must be present if the *Use safe calling hours* option is desired.

Priority

Priority can be used to indicate that the record shall be attempted as soon as possible relative to other records within the same list. This can be useful, for example, in order to give calling priority to the most recent web leads that tend to be most effective when followed up on immediately. A record will be treated as a prioritized record when its priority field is set to any value other than empty string, zero, "no", or "false". The priority setting only affects the first attempt to dial the record; for any possible subsequent attempts the prioritized record will be treated as a regular record. Priority of records can also be set to expire after a specified time period (see property *Priority expires after*).

State/Province

State/Province is a person's state/province. Either this field or the *Postal code* field must be present in the calling records in order to observe mandatory State Calling Hours.

Name

If the first line of the imported data contains column headings, these headings will be used as the default field names. Otherwise, default names *Field1*, *Field2*,..., *FieldN* will be assigned. Use this option to change the default field name if necessary. Field names are case-sensitive, which means that field names that differ in case only refer to the same field.

Required Field

Required Field indicates that the data in this field is required. If selected, the import process will not skip records that have no data in this field.

For all fields of the *Phone* type, this checkbox is preselected automatically. You can unselect it manually for any phone field that is optional. Remember, however, that at least one field of the imported list must have the type *Phone*.

For lists of the Salesforce.com type, field **ID** is preselected automatically and cannot be unselected.

Searchable Field

Searchable Field indicates this field may be searched for in the Agent Desktop application when associated with a custom Activity History field that is included in a screenpop activity form. For more information, see section Activity Forms.

The numbers are in the format for

This setting is displayed for the fields of type *Phone* only.

If all phone numbers in this field are within the USA and/or Canada, select **United States and Canada**. In this case, the numbers in this field will be processed according the following rules:

- If a number begins with “011”, it will be kept as is.
- If a number begins with “1” and has eleven digits, it will be kept as is.
- If a number does not begin with “1” and has ten digits, “1” will be prepended.
- In any other case, the record will not be imported.

If some or all numbers in this field are from countries other than the USA or Canada, select **Other countries or multiple countries**. In this case, the numbers in this field will be processed according the following rules:

- If a number begins with “+”, the leading "+" sign will be removed.
- In any other case, the number will be assumed to begin with a country code and also kept as is unless modified using the *Remove prefix* or *Default country code* settings.

Remove prefix

This setting is displayed for the fields of the type *Phone* only and can be used when the number format is set to *Other countries or multiple countries*. If phone numbers in this field contain a prefix that must be removed, specify this prefix here. Otherwise, this setting should be left blank.

Default country code

This setting is displayed for the fields of type *Phone* only and can be used when the number format is set to *Other countries or multiple countries*. By default, numbers in a field of type *Phone* are assumed to have country codes included. In this case, you can leave this field blank. Otherwise, specify the country code here; it will be automatically prepended to each number in the given field unless the number begins with “+”.

Note that a country code must be specified for campaigns with any calling hour restrictions and for campaigns where numbers are checked against DNC lists of the following types: Area Code, Geographic (Postal), and Geographic (State/Province).

Time zone

This setting is displayed for the fields of *Date/Time* type only. By default, the time in this field is assumed to be specified for the time zone indicated in the general settings of your contact center. You can use this setting to specify another the time zone for this field.

Date/Time format

This setting is displayed for the fields of *Date/Time* type only and allows you to select the format in which the date and time is specified in this field. If you cannot find a format that matches exactly the date/time pattern used in the imported list, use the editable field to specify this format manually, using the Java SimpleDateFormat conventions.

Note that campaign results report timestamps of call attempts in the following format: **MM/dd/yyyy HH:mm:ss z Z**, where **z Z** is the time zone (e.g., **11/09/2015 13:59:57 PST -0800**).

Order of prioritized records

This setting is displayed for the fields of type *Priority* only and defines the order in which prioritized records received during list updates will be attempted.

Priority expires after

This setting is displayed for the fields of type *Priority* only and specifies the time period during which records with a non-empty value of this field will be considered a prioritized record. Upon expiration, priority of these records will be lowered to normal. If you do not wish the priority of a record to expire at all, set this field to 0.

Key screen (for list type File only)

Key screen

Fields

This screen allows you to select a field, or a combination of fields, whose values will be used as keys (i.e., will uniquely identify records within the list). Only the fields that were marked as *Required* in the previous wizard step will appear as possible keys. Records with the same key values are considered duplicates, and only one of such duplicate records will appear in the imported list. Keys are also used to reference the campaign results to the original list records.

Save config only

Click this button, instead of clicking *Next*, if you wish to save only the list format (i.e., the configured field and key information without the actual data). The result will appear as a new list with zero records in the list view.

Import Complete screen

Import Complete screen

Import results

This screen provides statistics about the imported list, including the number of successfully imported records, as well as the numbers of records that have not been imported for various reasons.

Calling records that contain the same phone number in multiple fields of the*Phone* type will be successfully imported. The dialer will detect duplicate numbers while processing the list for use in a specific campaign and will only use the number in the first phone field while ignoring that number in all other phone fields of the same record. For example, if a calling record contains the same number in the field **Home Phone**, which happens to be the fourth field in the record, and in field **Mobile Phone**, which is the sixth field, the dialer will use this number according to the calling hours set for home phones. It will ignore this number when dialing mobile numbers (or when sending preview records to agents in case of a preview campaign).

Updating Lists

New lists imported via the list import wizard appear in the list view of Lists. You can update these lists manually or set up periodic automatic updates.

Manual List Update

To update a list manually, select it from the list view and click the**Add records** button at the bottom of the screen. (Note that this function is not available for lists of Salesforce.com type.) A list update wizard appears. Its screens and properties are described as follows.

Name and Source screen

List name

List name is the name of the selected list. It is read-only.

Data source

Data source is the source of data for this list. To upload a file from a local source, select**Upload**, click **Browse**, and select the data file. To obtain data from an external source, select the transport protocol (*FTP* or *SFTP*), and specify the address (URL), *Username*, and *Password*.

Note that only plain text list files (.CSV or fixed width) are supported as sources for list data. Note that the data structure of the selected data source shall correspond to the data structure of the data source used for the original import.

Update Policy screen

replace list data

Select this option if the data from the specified data source shall replace the existing list data. Note the following:

- Any campaign results that may have been associated with the existing list records will be deleted.
- Replacement of existing list data requires internal re-processing of the entire calling list. Thus, if updates with this policy are applied to a list within a running campaign, use of this list within the given campaign will be suspended until list re-processing is complete. The suspension time will depend on the list size and, for long lists, may amount to tens of minutes. Other lists associated with the same campaign will not be affected.

add list data

Select this option if the data from the specified data source shall be added to the existing list data. Note that data records whose keys match with keys of the existing records will not be imported.

Import Complete screen

Import results

This screen provides statistics about the imported list, including the number of successfully imported records, as well as the numbers of records that have not been imported for various reasons.

List Properties and Automated Updates

To view the current content of a list, set up periodic automatic updates, or view the list import/update history, select the desired list from the list view.

Lists > Properties tab

Lists screen properties

Properties tab

Name

This is the *name* of the list. List name is originally defined during the initial list import, but it can be changed at any time. The name must be unique within the contact center.

Format

Format is the name of the format that this list is based on. It is read-only. (The format is selected or defined during the initial list import.)

To review the format, click the **view** link. A new dialog window will open with description of all fields defined within this format. For more information, see description of the **Fields** screen of the List Import Wizard above. If any activity forms are mapped to lists based on this format, this view will also show the mapping between the form fields and list fields.

For lists of the Salesforce.com type, the window will also show the SOQL query that is used to extract the list records from the Salesforce.com application. While you cannot change the field composition or formatting, you can modify the data selection criteria for these fields (i.e., any condition in the *WHERE* part of the query). To do so, hover over the SOQL query and click **EDIT**. The new selection criteria will be applied upon the next list update.

Campaigns

Click **add** to associate this list with one or more campaigns. For additional configuration options related to use of the list within the associated campaign, select this campaign in the Services and Campaigns list view and open the Lists tab.

Expire records

You can set the list records to expire in a specified number of days. If a record expires before it is completed according to the regular campaign dial rules, its processing within campaign will be finished with the predefined disposition *Record Expired*.

To set the records of the given list to expire, select the checkbox, specify the *Expiration period*, and indicate the starting point from which this period will be counted:

- To count from the date when records appear in the system (either via the initial list import or subsequent list updates), select **Count expiration period since record insertion**. This expiration mechanism can be used to comply with your local telemarketing regulations that may require periodic scrubbing of calling records against national or state-wide do-not-call lists, after which any unmatched numbers are considered to be good for dialing over a certain period (e.g., 30 days for numbers added to the US National Do-Not-Call Registry or 15 days for numbers ported to mobile phones).
- To count from the date specified in the calling record itself, select **Count expiration period using date in record**. This expiration mechanism can be used for calling lists that are based on customers' callback requests (opt-in callback lists) if your local telemarketing regulations require that such callbacks are made within a specific number of days.

Expiration period

Expiration period is the number days in which the records of this list expire. See the description of the **Expire records** setting for more information.

Expiration field

Expiration field is the field of the calling list that will be used to determine when the callback request was made, which is necessary in order to calculate when it expires. Only fields of type **Date/Time** are available for selection as expiration fields. This setting is essential if you have selected the **Count expiration using date in record** option. See the description of the **Expire records** setting for more information.

Periodic Import

To set up automatic periodic updates for this list, click **edit**.

In the dialog that appears:

1. Specify the protocol (*FTP* or *SFTP*), *URL with file name*, *FTP Username*, and *FTP Password*; this setting is specified for lists of *File* type only.
2. Select the *Start date and time* of the first update and specify the desired *Import interval*.
3. Select the desired *Update Policy*. (Note that the *replace list data* policy may suspend use of this list within a running campaign for the time it takes to re-process the list.) This setting is specified for lists of the *File* type only.
4. Click **OK**.
5. Once these parameters are defined, select the *Enabled* checkbox to activate periodic import.

For lists of the *Salesforce.com* type, new records matching the original SOQL query will be added to the list during each update, while any records that may have been removed from Salesforce will be disabled in the list. If there are campaign results available for such disabled records, they will be preserved.

For lists of the 'Salesforce.com *type, there is a 30-second timeout on the Bright Pattern Contact Center side to begin receiving data from SFDC after the SOQL query is submitted.*

You can also run import with the above settings at any time by clicking **Run import now**.

Contents tab

Lists > Contents tab

List pane

The *List pane* shows the entire content of the list. It is read-only.

Record pane

The *Record pane* shows the content of the record selected from the List pane. It is read-only.

Timestamp

Timestamp is the timestamp of the operation.

Errors is the total number of records that were not imported due to various errors (missing required fields, duplicate keys, incorrect format).

Operator

Operator is the username of the user who performed this operation.

Comment

Comment is the operation result.

Log Tab

Timestamp

Time stamp of the operation

File

Name of the list data source file

Direction

Type of the operation (*IN* for import/updates, *EXP* for export of campaign results)

Number of records

Total number of successfully imported/exported records during this operation

Errors

Total number of records that were not imported due to various errors (missing required fields, duplicate keys, incorrect format)

Operator

Username of the user who performed this operation

Comment

Operation result

1. REDIRECT 5.3:Contact-center-administrator-guide/ServicesandCampaigns/Outbound-General

1. REDIRECT 5.3:Contact-center-administrator-guide/QualityManagement/CallRecording

1. REDIRECT 5.3:Contact-center-administrator-guide/ServicesandCampaigns/ServicesandCampaignsOverview

1. REDIRECT 5.3:Agent-guide/Work/CasesEmail/CasesEmailandThreads

1. REDIRECT 5.3:Contact-center-administrator-guide/ScenarioEntries/MessagingChat

1. REDIRECT 5.3:Agent-guide/Tutorials/Calls/ConsultationsandTransfers

1. REDIRECT 5.3:Contact-center-administrator-guide/ServicesandCampaigns/Outbound-General

1. REDIRECT 5.3:Scenario-builder-reference-guide/ScenarioBlocks/GetUserConfiguration

1. REDIRECT 5.3:Contact-center-administrator-guide/Directory/Dial-outEntries

1. REDIRECT 5.3:Contact-center-administrator-guide/ScenarioEntries/Dial-in

1. REDIRECT 5.3:Contact-center-administrator-guide/Directory/Dial-outEntries

1. REDIRECT 5.3:Contact-center-administrator-guide/ScenarioEntries/Dial-in

1. REDIRECT 5.3:Contact-center-administrator-guide/ServicesandCampaigns/DispositionsTab

Do Not Call Lists

Do Not Call (DNC) lists contain data about destinations that may not be called during outbound calling campaigns. At the configuration stage, one or more DNC lists may be associated with a campaign. When the campaign is started, records from the campaign's calling lists are checked against the DNC data, and if a match is found, the number or the entire record is skipped.

For more information about associating DNC lists with campaigns, see the description of the[DNC screen](#) of the outbound campaign settings.

To view and edit DNC lists, select the *Do Not Call Lists* option from the root menu.

Do Not Call Lists

When you click the button with the "**+**" sign to configure a new DNC list, you will be first prompted to select the list type. The set of properties that you will have to configure will depend in part on the DNC list type.

Note that you can import your existing data for DNC lists of all types except*Geographic (State/Province)*. To import list data, click the import button and select a file to upload.

Settings

The *Do Not Call Lists* screen properties are organized into several tabs: Properties, Contents, and Log. The screen properties are described as follows.

Properties tab

Name

Name is the name of the DNC list. A mandatory field, the name must be unique within the contact center.

Type

Type is the type of this DNC list. It is mandatory, and once specified, it cannot be changed.

The following types of DNC lists are supported:

- **Internal**: A list of phone numbers created and maintained within your contact center; numbers are added to this list when agents participating in an outbound or blended service finish call processing with [disposition *Add to DNC*](#); numbers in the calling records that match numbers in DNC lists of this type will not be dialed (but the record itself may continue to be used if it has other numbers in it)

- **Geographic (Postal)**: A list of postal codes; if a postal code of a calling record matches a postal code in this type of DNC list, processing of this calling record within the given campaign will stop. Please note that for this type of DNC you need to have the proper country selected, and the phone numbers of calling lists used in the associated campaigns must start with a country code.
- **Geographic (State/Province)**: A list of states/provinces; if the state/province info of a calling record matches a state/province in this type of DNC list, processing of this calling record within the given campaign will stop. Please note that for this type of DNC you need to have the proper country selected, and the phone numbers of calling lists used in the associated campaigns must start with a country code.
- **Area codes**: A list of area codes; if the area code of a phone number in a calling record matches an area code in this type of DNC list, this number will not be dialed (but the record itself may continue to be used if it has other numbers in it). Please note that phone numbers in the DNC list of this type must contain a country code. The phone numbers of calling lists used in the associated campaigns must start with a country code.
- **Record Exclusion**: A list of identifiers of customer records in calling lists (e.g., customers' account numbers); if a match is found, processing of this calling record within the given campaign will stop; note that DNC lists of this type can be updated periodically via FTP (see property *Periodic Import* below); the results of such periodic updates are displayed in the *Log* tab

List field to match

Select the calling list field that will be used as identifier of customer records that must not be dialed. This property is displayed only for DNC lists of the *Record Exclusion* type and contains list fields from all available calling list formats.

Country

Country is the country whose postal codes or state/provinces that this DNC list shall contain. This property is displayed for DNCs of types *Geographic (Postal)*, *Geographic (State/Province)*, and *Area Codes*. Note that default country options include the United States and Japan.

Campaigns

These are the *campaigns* associated with this DNC list. Such association is typically established as part of campaign configuration. However, if you need to associate a new DNC list with an existing campaign, it may be more convenient to do it directly from this screen.

How to create a new DNC list with an existing campaign:

- Click **add**
- Select the desired **Campaign** from the drop-down menu
- Specify the **Disposition** that will be attached to the call attempts (in case of number match) or to completed records (in case of record match)

If the campaign is part of a campaign link group, the selected DNC list can be automatically applied to all other campaigns in the link group. To indicate that the list shall apply to all campaigns in the link group, select the **add all linked campaigns** checkbox.

When associating an internal DNC list, note that by default it will be possible to add new numbers to this list during the given campaign (e.g., upon request of the called party). If you wish to block this capability, deselect the **append OK** checkbox.

To associate a DNC list with all campaigns, click **add all** and select the desired disposition. To remove all previously established associations, click **remove all**.

Note that numbers are added to internal DNC lists in the context of active campaigns that the corresponding calls are associated with. Therefore:

- If you use multiple internal DNC lists associated with different campaigns, a number will be added only to the list(s) associated with the campaign within which the corresponding call was handled.
- If you use a blended service, you should keep the outbound portion of this service enabled at all times in order to correctly process the possible do-not-call requests of the customers who call back your campaign. If the outbound portion of your blended service is disabled, numbers will not be added in such situations.

States/Provinces

These are the *states/provinces* whose phone records must be excluded from outbound campaigns associated with this DNC. This property is displayed for DNCs of type *Geographic (State/Province)* only. To add a state/province to this list, click **add**.

Periodic Import

Parameters are specified for the periodic list import. These parameters apply to DNC lists of type *Record Exclusion* only.

To set up automatic periodic updates for this list, click **edit**.

In the dialog that appears:

- Specify the protocol (**FTP** or **SFTP**), **URL with file name**, **FTP Username**, and **FTP Password**.
- Select the **Start date and time** of the first update and specify the desired **Import interval**.
- Select the desired **Update Policy** (see the description of the List Update Wizard properties for more information about the update policies).
- Click **OK**.

Once the above parameters are defined, select the **Enabled** checkbox to activate periodic import.

You can also run import with the above settings at any time by clicking **Run import now**.

Periodic Reset

Parameters for daily list data reset. These parameters apply to DNC lists of type *Record Exclusion* only.

To enable periodic reset, select the **Reset list data daily** checkbox, and specify the desired **Reset time**.

Contents tab

List view

List view shows the entire content of the DNC list. It is read-only. Note that the view will be different depending on the DNC list type.

- An *Internal* list displays the numbers, identifiers of the agents who added them, time and date when they were added, and campaigns during which they were added.
- A *Geographical (Postal)* list displays postal codes and possible free-text notes. To add a postal code to this list, click the "**+**" button at the bottom of tab view, specify the desired code in the **Postal Code** field, enter any additional information in the **Notes** field, and click **Apply**.
- An *Area Codes* list displays area codes and possible free-text notes. To add an area code to this list, click the "**+**"

button at the bottom of tab view, specify the desired code in the **Area Code** field, enter any additional information in the **Notes** field, and click **Apply**.
- A *Record Exclusion* list displays values of the selected field that should lead to record exclusion when matched.

Log tab

The Log tab is for DNC lists of type *Record Exclusion* only.

Timestamp

This is the time stamp of the operation.

File

File is the name of the imported/reset file.

Operation

The type of the operation is specified here.

Number of records

Number of records is the total number of successfully imported/reset records during this operation.

Operator

Operator is the username of the user who performed this operation.

Notes

The *Notes* field gives the operation result.

DNC list data is deleted from the calling list database automatically when the corresponding DNC list object is deleted from configuration. Current data of the DNC lists of type *Record Exclusion* is also deleted when the list is reset or updated with new content via periodic import (where applicable) with the update policy set to *replace list data*.

1. REDIRECT 5.3:Tutorials-for-admins/Services/EmailServiceConfiguration

1. REDIRECT 5.3:Agent-guide/Work/CasesEmail/CasesEmailandThreads

1. REDIRECT 5.3:Contact-center-administrator-guide/Directory/Softphones

1. REDIRECT 5.3:Contact-center-administrator-guide/Directory/Hardphones

1. REDIRECT 5.3:Contact-center-administrator-guide/CallCenterConfiguration/HoursofOperation

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.

< Previous | Next >

1. REDIRECT 5.3:Contact-center-administrator-guide/ScenarioEntries/Dial-in

Interaction Records Search

When you select the *Interaction Records* tab from the top of the screen, the application pane will initially display a search page where you define media type(s) of the interactions you are looking for as well as other search criteria, such as time frame, participating agent(s), and/or service(s) involved.

This section offers an overview of the Interaction Records Search feature. For detailed descriptions of search criteria and search results, see sections List of Interaction Records Search Criteria and Search Results.

Notes:

- Only completed interaction segments appear in the Interaction Records search. For emails, this means that an email will only appear in search results after it has been replied to, closed without reply, or saved as a draft. Thus, emails in the initial distribution queue will not be shown.
- The standard aggregation period for the raw data used to produce detailed interaction records and historical reports is 15 minutes; therefore, under normal circumstances, detailed records for completed interactions and agent activities are available in Interaction Records and Agent Timeline within 15 minutes.
- In a worst-case scenario, the recordings for an interaction may be unavailable during two aggregation intervals (i.e., 30 minutes). Therefore, we recommend reviewing an interaction 30 minutes after it is completed.

Adding Search Conditions

Your search criteria can have any number of conditions (i.e., search criteria). To add a condition to your search, click **add condition**. To edit or delete an existing condition, use the mouse-over operation.

Interaction records search

Saving Search Conditions

You can save a set of search conditions for future use--a helpful capability for when you regularly run the same searches and you do not want to add conditions manually each time you search. To save a set of search conditions, click **Save** and assign a name to it. To use a previously saved set of search conditions, click **Load**, and select its name from the drop-down menu.

Click "Save" to save your search conditions for future use

Viewing Search Results

When all desired search conditions are specified, click the **Search** button. The Search Results page will open with the list of interaction records matching your search criteria. Each row of the displayed table describes a single interaction.

Search results

Note that an interaction may have multiple segments (e.g., when a call was handled by multiple agents). The number of segments in a call is shown in the *Segments* column. You can see details for each segment of a selected call by clicking that number.

Some columns show data that is media-type specific (e.g., *Case ID Subject* is only relevant for emails). You can adjust the format of your table to display only the columns for the data that you need. To remove columns, hover over any column header, open the drop-down menu, and unselect the columns for the data you do not need.

You can download all records that appear in the Search Results page in the .CSV format. To export the records, click the **export** button at the bottom of the page.

You can also manually download email content, call recordings, and call progress analysis (CPA) recordings for the interactions shown in the *Search Results* page. Note that manual download is limited to up to 100 emails, 100 call recordings, and 500 CPA recordings, respectively.

Periodic automated export of call/CPA recordings is configured via *Services and Campaigns > Results Tab* of the Contact Center Administrator application.

Erasing Interaction Content

The *Erase* feature for an interaction record allows you to remove the content of the record (i.e., voice recording and/or transcript for a call, the transcript for a chat, message body for an email, etc.), which may be necessary in order to comply with privacy laws or security standards. When taking this action, note that you can delete the content of one interaction at a time. For bulk erasure of interaction content, see the *Contact Center Administrator Guide*, section Results Tab > Interactions Erasing.

An interaction record with the option to erase it

How to Erase Interaction Content

To erase content of a single interaction, take the following steps:

1. Configure the desired criteria for your records search and find the desired interaction record.
2. Open the record for review by clicking it's content item.
3. At the bottom of the record, select the **Erase** button; this will pop the *Erase interaction* window

Interaction-Records-Erase-Window-1-53.PNG

4. Select **Items to erase**, which displays the type of content you wish to erase (e.g., a voice recording, a transcript, or both)
5. Fill in the mandatory **Reason** field; this allows you to provide a reason the content was erased.
6. Select the **Erase** button and you will see a new prompt, warning you that erasing the interaction is permanent.

Interaction-Records-Erase-Interaction-Prompt-53.PNG

7. Select the **Erase** button again and the interaction will be permanently erased. Note that for email interactions, the *Erase* function erases content of one email message at a time. For other media types (voice, chat), the content of the entire interaction will be erased at once, regardless of the number of interaction segments.

Note that in the interaction window, if you select the segment that was erased, a message will display the time, date, user, and reason the interaction was erased.

Interaction-Records-Erased-Interaction-Message-53.PNG

1. REDIRECT 5.3:Contact-center-administrator-guide/ServicesandCampaigns/Outbound-General

1. REDIRECT 5.3:Contact-center-administrator-guide/CallCenterConfiguration/KnowledgeBase

Lists

Lists contain destination data for automated outbound dialing. Each list record provides information about a single destination, and typically includes customer’s name, at least one telephone number, and other information specific to the dialing purpose. For example, lists used in a satisfaction survey campaign may include information about products purchased by the customers. Lists are used in outbound and blended services as discussed in section Services and Campaigns - Lists Tab.

List data is deleted from the calling list database automatically when the

- corresponding list object is deleted from configuration
- list is updated with new content via periodic import with the update policy set to *replace list data*

To work with lists, select the **Lists** option from the root menu. To import and configure a new list, click the button with the “+” sign. A list import wizard will open.

List import wizard

List Import

The list import wizard screens and properties are described as follows.

List Type screen

List type screen

Select list type

Select the method that will be used to import data to this list: a file or Salesforce.com query. For the latter, you must have a Salesforce.com integration account configured in your system.

For detailed instructions on importing data from a Salesforce.com application see sectionImporting Calling Lists and Exporting Campaign Results of the *Salesforce.com Integration Guide*.

Name and Source screen

Name and Source screen

Data source

Data source is the source of data for this list. To upload a file from a local source, select **Upload**, click **Browse**, and select the data file. You can use results of previous campaigns, filtered by disposition if necessary, as the source of your list data.

To obtain data from an external source, select the transfer protocol (*FTP* or *SFTP*), and specify the address (URL), *Username*, and *Password*.

Note that only plain text list files (.CSV or fixed width) are supported as sources for list data. This setting is specified for list type *File* only.

List name

The list name is mandatory and must be unique within the contact center. The name of the selected data source is offered as the default name.

List format

If you want the format of a list to be based on the format of one of the previously imported lists, select the desired *list format* from the drop-down menu. Using an existing list format can save you time while going through the subsequent import steps, especially the *Fields* wizard screen.

If you need to review the desired format before assigning it, close the wizard, locate the desired format in the *Format* column of the list view, select the corresponding list, and click the **view** link in the **Properties** tab.

Note that if you select an existing list format but decide to introduce some changes for the imported list (e.g., change some field names), then upon completion of the wizard, you will be prompted to save these changes as a new format.

If you wish to create a new format using the layout of the imported list, select**Create new format**. This setting is specified for list type **File** only.

Salesforce.com integration account

The Salesforce.com integration account is what will be used to obtain Salesforce.com data for this list. This setting is specified for list type Salesforce.com only.

SOQL query to select object for list

Use this field to specify the query for selecting Salesforce.com records for this calling list. The query must be written in the Salesforce Object Query Language (SOQL). Note that the records must contain object identifiers and have at least one phone number.

This setting is specified for list type Salesforce.com only. Note that there is a 30 second timeout on the Bright Pattern Contact Center side to begin receiving data from SFDC after the SOQL query is submitted.

Format Type screen (for list type *File* only)

Format Type screen

Delimited

Select *Delimited* if a character, such as comma or tab, separates each field in the imported data

First line contains field names

Select this checkbox if the first line of the imported data appears to contain column headings. Field names are case insensitive starting from version 3.13. This means field names that differ in case only refer to the same field.

Fixed width

Select this option if fields of the imported data appear to be aligned in columns with spaces between each field.

Input file encoding

The *Input file encoding* option lets you select the encoding used by the source file. Initially, the UTF-8 encoding is assumed by default. If you select another encoding during a list import, the selected encoding will become the new default for subsequent list imports.

Format Options screen (for list type *File* only)

Format Options screen

Delimiter

Select the character that is used to separate each field in the imported data. If the delimiting character is anything other than the comma, tab, or semicolon, use the **Custom** option to specify the character. When the correct delimiter is selected, the preview should show the imported data arranged as a table.

Fields screen

Fields screen

Do not import field (skip)

This field indicates whether the selected field is to be imported. Select this checkbox if the data in the selected field is not essential for any contact center operations (i.e., will not be used for dialing, analyzed in a scenario, or displayed for agents) and does not need to appear in campaign results.

Type

Specify the *type* of data that the selected field contains. If the type of data is anything other than the data types predefined in the drop-down menu, select *Other*. Note that at least one field of the imported list must have type *Phone*.

If the first row of the imported data contains column names, the wizard will try to automatically set field types according to matching column names (e.g., a column titled *State* will be set to field type *State*). You should review all name-type pairs to make sure the mapping is correct.

Possible uses of the available field types are described as follows.

Account

Account can be used for a field that contains a customer identifier. If defined, the value from this field will be stored as part of the history of all calls initiated by the corresponding calling record and can be used as a selection criterion in interaction record search. Unique account numbers can also be used as calling record keys (see below). A list can have only one field of this type.

Agent Login ID

Agent Login ID can be used to assign list records to specific agents. This may be useful, for example, for proactive contacts within established business relationships where clients might expect/prefer to be contacted by business representatives that they are familiar with. Note that such personal record assignments are used in preview campaigns only. When a list with records assigned to specific agents is used in apredictive, progressive, or automatic/IVR campaign, all such assignments will be ignored.

Caller ID

If calling records contain numbers that should be displayed as caller IDs when dialing corresponding records during campaigns, use the field type *Caller ID* for the field that contains these numbers. Use of these numbers as Caller IDs for a particular campaign is enabled by the campaign's Caller ID settings (option *From list field of type "Caller ID", otherwise default*). Note that your service provider may or may not allow use of arbitrary caller ID numbers for your outgoing calls. If use of arbitrary caller IDs is not available to you, the number specified in the calling record will be used only as a caller ID if it matches one of the access numbers assigned to your contact center; otherwise, the specified default number will be used. When using this field to specify caller IDs for your campaign, be sure to check all legal requirements and restrictions for what can be sent as a caller ID in the jurisdictions where you operate.

Company

Company can be used when calling record contains a company name.

Date/Time

If the calling list is based on customers' callback requests (opt-in callback list), your local telemarketing regulations may require that such callbacks are made within a specific number of days. In this case, the imported list will typically have information about when the callback request was made. Use the field type *Date/Time* for this information. Fields of the *Date/Time* type cannot be used to set campaign quotas.

Date/Time - schedule call at

Date/Time - schedule call at can be used to provide, during list import, information about when this record needs to be called. It can be used to define the exact moment of time when this record needs to be attempted.

Note that the call will happen as close to the specified date and time as possible; the system will make the best attempt. Safe calling hours are not ignored. If the date and time are in the past at the time of list load, the field contents are ignored.

Encrypted data

Encrypted data can be used to store sensitive information that must be stored encrypted and only be presented in clear text to the agent who will be processing the record in case of a successful call attempt. Note that the encrypted data cannot be not automatically processed by the system, and thus, may not include any information used for campaign automation, such as phone numbers, zip codes, states, or any information that is used to set campaign quotas. If you do not see the **Encrypted data** field type, the data encryption function is not enabled for your contact center by the service provider.

First name

First name is the person's first name.

Integer

Integer is intended for fields with semantically numeric data (e.g., person's age or account balance) that may be used to set a campaign quota.

Last name

Last name is a person's last name.

Other

Other can be used for fields that do not fall into any specific field type uses outlined here.

Phone

Phone should be set for fields with phone numbers that may be dialed during a campaign. A list must contain at least one field of this type.

Postal code

Postal code is a person's postal code. This must be present if the *Use safe calling hours* option is desired.

Priority

Priority can be used to indicate that the record shall be attempted as soon as possible relative to other records within the same list. This can be useful, for example, in order to give calling priority to the most recent web leads that tend to be most effective when followed up on immediately. A record will be treated as a prioritized record when its priority field is set to any value other than empty string, zero, "no", or "false". The priority setting only affects the first attempt to dial the record; for any possible subsequent attempts the prioritized record will be treated as a regular record. Priority of records can also be set to expire after a specified time period (see property *Priority expires after*).

State/Province

State/Province is a person's state/province. Either this field or the *Postal code* field must be present in the calling records in order to observe mandatory State Calling Hours.

Name

If the first line of the imported data contains column headings, these headings will be used as the default field names. Otherwise, default names *Field1*, *Field2*,..., *FieldN* will be assigned. Use this option to change the default field name if necessary. Field names are case-sensitive, which means that field names that differ in case only refer to the same field.

Required Field

Required Field indicates that the data in this field is required. If selected, the import process will not skip records that have no data in this field.

For all fields of the *Phone* type, this checkbox is preselected automatically. You can unselect it manually for any phone field that is optional. Remember, however, that at least one field of the imported list must have the type *Phone*.

For lists of the Salesforce.com type, field **ID** is preselected automatically and cannot be unselected.

Searchable Field

Searchable Field indicates this field may be searched for in the Agent Desktop application when associated with a custom Activity History field that is included in a screenpop activity form. For more information, see section Activity Forms.

The numbers are in the format for

This setting is displayed for the fields of type *Phone* only.

If all phone numbers in this field are within the USA and/or Canada, select **United States and Canada**. In this case, the numbers in this field will be processed according the following rules:

- If a number begins with “011”, it will be kept as is.
- If a number begins with “1” and has eleven digits, it will be kept as is.
- If a number does not begin with “1” and has ten digits, “1” will be prepended.
- In any other case, the record will not be imported.

If some or all numbers in this field are from countries other than the USA or Canada, select **Other countries or multiple countries**. In this case, the numbers in this field will be processed according the following rules:

- If a number begins with “+”, the leading "+" sign will be removed.
- In any other case, the number will be assumed to begin with a country code and also kept as is unless modified using the *Remove prefix* or *Default country code* settings.

Remove prefix

This setting is displayed for the fields of the type *Phone* only and can be used when the number format is set to *Other countries or multiple countries*. If phone numbers in this field contain a prefix that must be removed, specify this prefix here. Otherwise, this setting should be left blank.

Default country code

This setting is displayed for the fields of type *Phone* only and can be used when the number format is set to *Other countries or multiple countries*. By default, numbers in a field of type *Phone* are assumed to have country codes included. In this case, you can leave this field blank. Otherwise, specify the country code here; it will be automatically prepended to each number in the given field unless the number begins with “+”.

Note that a country code must be specified for campaigns with any calling hour restrictions and for campaigns where numbers are checked against DNC lists of the following types: Area Code, Geographic (Postal), and Geographic (State/Province).

Time zone

This setting is displayed for the fields of *Date/Time* type only. By default, the time in this field is assumed to be specified for the time zone indicated in the general settings of your contact center. You can use this setting to specify another the time zone for this field.

Date/Time format

This setting is displayed for the fields of *Date/Time* type only and allows you to select the format in which the date and time is specified in this field. If you cannot find a format that matches exactly the date/time pattern used in the imported list, use the editable field to specify this format manually, using the Java SimpleDateFormat conventions.

Note that campaign results report timestamps of call attempts in the following format: **MM/dd/yyyy HH:mm:ss z Z**, where **z Z** is the time zone (e.g., **11/09/2015 13:59:57 PST -0800**).

Order of prioritized records

This setting is displayed for the fields of type *Priority* only and defines the order in which prioritized records received during list updates will be attempted.

Priority expires after

This setting is displayed for the fields of type *Priority* only and specifies the time period during which records with a non-empty value of this field will be considered a prioritized record. Upon expiration, priority of these records will be lowered to normal. If you do not wish the priority of a record to expire at all, set this field to 0.

Key screen (for list type File only)

Key screen

Fields

This screen allows you to select a field, or a combination of fields, whose values will be used as keys (i.e., will uniquely identify records within the list). Only the fields that were marked as *Required* in the previous wizard step will appear as possible keys. Records with the same key values are considered duplicates, and only one of such duplicate records will appear in the imported list. Keys are also used to reference the campaign results to the original list records.

Save config only

Click this button, instead of clicking *Next*, if you wish to save only the list format (i.e., the configured field and key information without the actual data). The result will appear as a new list with zero records in the list view.

Import Complete screen

Import Complete screen

Import results

This screen provides statistics about the imported list, including the number of successfully imported records, as well as the numbers of records that have not been imported for various reasons.

Calling records that contain the same phone number in multiple fields of the *Phone* type will be successfully imported. The dialer will detect duplicate numbers while processing the list for use in a specific campaign and will only use the number in the first phone field while ignoring that number in all other phone fields of the same record. For example, if a calling record contains the same number in the field **Home Phone**, which happens to be the fourth field in the record, and in field **Mobile Phone**, which is the sixth field, the dialer will use this number according to the calling hours set for home phones. It will ignore this number when dialing mobile numbers (or when sending preview records to agents in case of a preview campaign).

Updating Lists

New lists imported via the list import wizard appear in the list view of Lists. You can update these lists manually or set up periodic automatic updates.

Manual List Update

To update a list manually, select it from the list view and click the **Add records** button at the bottom of the screen. (Note that this function is not available for lists of Salesforce.com type.) A list update wizard appears. Its screens and properties are described as follows.

Name and Source screen

List name

List name is the name of the selected list. It is read-only.

Data source

Data source is the source of data for this list. To upload a file from a local source, select **Upload**, click **Browse**, and select the data file. To obtain data from an external source, select the transport protocol (*FTP* or *SFTP*), and specify the address (URL), *Username*, and *Password*.

Note that only plain text list files (.CSV or fixed width) are supported as sources for list data. Note that the data structure of the selected data source shall correspond to the data structure of the data source used for the original import.

Update Policy screen

replace list data

Select this option if the data from the specified data source shall replace the existing list data. Note the following:

- Any campaign results that may have been associated with the existing list records will be deleted.
- Replacement of existing list data requires internal re-processing of the entire calling list. Thus, if updates with this policy are applied to a list within a running campaign, use of this list within the given campaign will be suspended until list re-processing is complete. The suspension time will depend on the list size and, for long lists, may amount to tens of minutes. Other lists associated with the same campaign will not be affected.

add list data

Select this option if the data from the specified data source shall be added to the existing list data. Note that data records whose keys match with keys of the existing records will not be imported.

Import Complete screen

Import results

This screen provides statistics about the imported list, including the number of successfully imported records, as well as the numbers of records that have not been imported for various reasons.

List Properties and Automated Updates

To view the current content of a list, set up periodic automatic updates, or view the list import/update history, select the desired list from the list view.

Lists > Properties tab

Lists screen properties

Properties tab

Name

This is the *name* of the list. List name is originally defined during the initial list import, but it can be changed at any time. The name must be unique within the contact center.

Format

Format is the name of the format that this list is based on. It is read-only. (The format is selected or defined during the initial list import.)

To review the format, click the **view** link. A new dialog window will open with description of all fields defined within this format. For more information, see description of the **Fields** screen of the List Import Wizard above. If any activity forms are mapped to lists based on this format, this view will also show the mapping between the form fields and list fields.

For lists of the Salesforce.com type, the window will also show the SOQL query that is used to extract the list records from the Salesforce.com application. While you cannot change the field composition or formatting, you can modify the data selection criteria for these fields (i.e., any condition in the *WHERE* part of the query). To do so, hover over the SOQL query and click **EDIT**. The new selection criteria will be applied upon the next list update.

Campaigns

Click **add** to associate this list with one or more campaigns. For additional configuration options related to use of the list within the associated campaign, select this campaign in the Services and Campaigns list view and open the Lists tab.

Expire records

You can set the list records to expire in a specified number of days. If a record expires before it is completed according to the regular campaign dial rules, its processing within campaign will be finished with the predefined disposition *Record Expired*.

To set the records of the given list to expire, select the checkbox, specify the *Expiration period*, and indicate the starting point from which this period will be counted:

- To count from the date when records appear in the system (either via the initial list import or subsequent list updates), select **Count expiration period since record insertion**. This expiration mechanism can be used to comply with your local telemarketing regulations that may require periodic scrubbing of calling records against national or state-wide do-not-call lists, after which any unmatched numbers are considered to be good for dialing over a certain period (e.g., 30 days for numbers added to the US National Do-Not-Call Registry or 15 days for numbers ported to mobile phones).
- To count from the date specified in the calling record itself, select **Count expiration period using date in record**. This expiration mechanism can be used for calling lists that are based on customers' callback requests (opt-in callback lists) if your local telemarketing regulations require that such callbacks are made within a specific number of days.

Expiration period

Expiration period is the number days in which the records of this list expire. See the description of the **Expire records** setting for more information.

Expiration field

Expiration field is the field of the calling list that will be used to determine when the callback request was made, which is necessary in order to calculate when it expires. Only fields of type **Date/Time** are available for selection as expiration fields. This setting is essential if you have selected the **Count expiration using date in record** option. See the description of the **Expire records** setting for more information.

Periodic Import

To set up automatic periodic updates for this list, click **edit**.

In the dialog that appears:

1. Specify the protocol (*FTP* or *SFTP*), *URL with file name*, *FTP Username*, and *FTP Password*; this setting is specified for lists of *File* type only.
2. Select the *Start date and time* of the first update and specify the desired *Import interval*.
3. Select the desired *Update Policy*. (Note that the *replace list data* policy may suspend use of this list within a running campaign for the time it takes to re-process the list.) This setting is specified for lists of the *File* type only.
4. Click **OK**.
5. Once these parameters are defined, select the *Enabled* checkbox to activate periodic import.

For lists of the *Salesforce.com* type, new records matching the original SOQL query will be added to the list during each update, while any records that may have been removed from Salesforce will be disabled in the list. If there are campaign results available for such disabled records, they will be preserved.

For lists of the 'Salesforce.com *type, there is a 30-second timeout on the Bright Pattern Contact Center side to begin receiving data from SFDC after the SOQL query is submitted.*

You can also run import with the above settings at any time by clicking **Run import now**.

Contents tab

Lists > Contents tab

List pane

The *List pane* shows the entire content of the list. It is read-only.

Record pane

The *Record pane* shows the content of the record selected from the List pane. It is read-only.

Timestamp

Timestamp is the timestamp of the operation.

Errors is the total number of records that were not imported due to various errors (missing required fields, duplicate keys, incorrect format).

Operator

Operator is the username of the user who performed this operation.

Comment

Comment is the operation result.

Log Tab

Timestamp

Time stamp of the operation

File

Name of the list data source file

Direction

Type of the operation (*IN* for import/updates, *EXP* for export of campaign results)

Number of records

Total number of successfully imported/exported records during this operation

Errors

Total number of records that were not imported due to various errors (missing required fields, duplicate keys, incorrect format)

Operator

Username of the user who performed this operation

Comment

Operation result

1. REDIRECT 5.3:Contact-center-administrator-guide/ScenarioEntries/MessagingChat

1. REDIRECT 5.3:Agent-guide/Work/Mobile/Overview

1. REDIRECT 5.3:Agent-guide/Setup/PhoneDevice

1. REDIRECT 5.3:Agent-guide/Tutorials/States/HowtoInterpretYourCurrentStateInformation

1. REDIRECT 5.3:Agent-guide/Tutorials/States/HowtoMakeYourselfNotReady

1. REDIRECT 5.3:Contact-center-administrator-guide/ServicesandCampaigns/Outbound-General

1. REDIRECT 5.3:Contact-center-administrator-guide/ServicesandCampaigns/Outbound-General

1. REDIRECT 5.3:Contact-center-administrator-guide/UsersandTeams/Privileges

1. REDIRECT 5.3:Contact-center-administrator-guide/ServicesandCampaigns/EmailTab

1. REDIRECT 5.3:Contact-center-administrator-guide/ServicesandCampaigns/EmailTab

General Information About Quality Management

In contact centers, quality management usually refers to the assessment of the quality of agent work via reviewing the available call and screen recordings, chat transcripts, and email messages. In Bright Pattern Contact Center, the results of such reviews can be expressed using a number of customizable grading categories, such as politeness and knowledge.

In this *Reporting Reference Guide*, Quality Management sections Call Recordings, Chat Transcripts, Email Messages, and Screen Recordings relate to the data provided in the Interaction Records Search Results.

How to Review Call Recordings, Chat Transcripts, and Email

To review call recordings, chat transcripts, or email messages, first select the desired interactions as described in section Interaction Records Search. The search conditions depend on your quality management practices. For example, if quality monitoring is based on random checks of agent recordings or transcripts, it is usually sufficient to define the agent's username and the desired time frame as your search conditions. If, on the other hand, you follow-up on a specific customer complaint, your search conditions may contain the customer's phone number, service name, and time frame.

When all desired search conditions are specified, click the **Search** button. The *Search Results* page will open with the list of interaction records matching your search criteria. If a particular interaction has been previously reviewed and rated, the user name will appear in the *Reviewed by* column.

The Search Results page displays all interaction information

Recording Availability

For phone calls, the availability of a recording for a particular call will be indicated by the audio icon in the *Recording* column. The percentage of recorded calls is specified in your contact center configuration and can be redefined for each service and each individual agent separately. If not all calls in your contact center are recorded, you can use filter *has recording* to limit your search results to call records that actually have recordings.

For chat interactions, the availability of a chat transcript is indicated by the messaging icon in the *Recording* column. Bright Pattern Contact Center unconditionally records transcripts for all chat service interactions and stores them for the same amount of time as the corresponding interaction records themselves. Therefore, you do not need to use any special filters to get access to chat interactions with transcripts.

1. REDIRECT 5.3:Agent-guide/Tutorials/States/HowtoInterpretYourCurrentStateInformation

1. REDIRECT 5.3:Contact-center-administrator-guide/ScenarioEntries/Email

1. REDIRECT 5.3:Contact-center-administrator-guide/UsersandTeams/SkillLevels

1. REDIRECT 5.3:Agent-guide/Tutorials/Calls/HowtoAnsweranIncomingCall

1. REDIRECT 5.3:Contact-center-administrator-guide/UsersandTeams/Roles

1. REDIRECT 5.3:Contact-center-administrator-guide/Scenarios/ScenariosOverview

1. REDIRECT 5.3:Contact-center-administrator-guide/ScenarioEntries/ScenarioEntriesOverview

1. REDIRECT 5.3:Agent-guide/Tutorials/Calls/HowtoScheduleaFollow-upActivity

1. REDIRECT 5.3:Contact-center-administrator-guide/ServicesandCampaigns/ServicesandCampaignsOverview

Service Metrics Report

This report provides a full set of key performance indicators for selected inbound services.

The related metrics in this report are calculated for call and/or chat media types. For email service metrics, use the Email Service Report.

Note: If you run service reports for time periods when you had old or discontinued services, the names of these services will be displayed; this includes deleted services. The reports for these time periods will show that you had interactions as well as the service names you had at that time. Note that if you do not have any activity on these services within 30 days, the system will display the service names in italics; the system will not show the names at all after 90 days without activity.

Metric Descriptions

Number of Calls Received

Number of Calls Received is the total number of calls/chat interactions that requested this service in the given reporting interval.

If a call requests a service upon arrival and then is transferred to the same service internally, it will be counted twice in this metric. Likewise, if a chat interaction requests a service upon arrival and then is transferred to the same service internally, it will be counted twice in this metric. Please consider that due to different ways of treatment of calls there might be discrepancies in the service reports between the number of handled calls (i.e., answered, received etc.) and queued calls. A received call might be transferred or escalated and it will be counted as many times as it was transferred.

Received as Transfers

For voice calls only, *Received as Transfers* is the number of calls that requested this service via transfer operation.

Service Level

Service Level is the percentage of calls or chats to this service that were answered within thepredefined service level threshold relative to all answered or abandoned calls/chats except the calls/chats abandoned within that threshold.

Self Service

For voice calls only, *Self Service* is the number of calls serviced by an IVR application (as indicated by execution of scenario block Self-Service Provided).

%

For voice calls only, *%* is the percentage of calls serviced by an IVR application relative to total number of calls that requested this service.

Abandoned in IVR

Abandoned in IVR is the number of calls/chats to this service that were abandoned before entering the queue (e.g., while still in the IVR stage).

%

% is the percentage of calls/chats to this service that were abandoned in IVR relative to total number of calls that requested this service.

Queued

Queued is the number of calls/chats to this service that entered the queue, including calls/chats that selected the Virtual Queue option.

%

% is the percentage of calls/chats to this service that entered the queue relative to total number of calls/chats that requested this service.

Abandoned

Abandoned is the number of calls/chats to this service that abandoned after they were placed in the service queue. Note that if the Service Level is configured for this service, this metric will exclude the calls that abandoned within the service level threshold (i.e., short abandoned calls).

This metric includes:

- Calls that were abandoned while ringing
- Chats that were closed after the chat interaction was initiated
- Calls that selected the Virtual Queue option (i.e., a callback was requested), and
  - Did not answer when called back, or
  - Were busy when called back, or
  - Answered when called back but hung up before being connected to the agent

%

% is the percentage of calls/chats to this service that were abandoned outside of the service level threshold relative to the total number of calls/chats that requested this service except the calls/chats abandoned within the service level threshold.

Abandonment Time, Average

Abandonment Time, Average is the average time that the abandoned calls/chats to this service spent waiting in the service queue. For voice calls, *Abandonment Time, Average* could be the average time that the call was ringing before being abandoned (excluding calls abandoned within the service level threshold).

Overflow

Overflow is the number of calls/chats to this service that were routed to overflow destinations.

%

% is the percentage of calls/chats to this service that were routed to overflow destinations relative to the total number of calls/chats that requested this service.

Answered

Answered is the number of calls/chats to this service that were accepted by agents, including calls that selected the Virtual Queue option, answered when called back, and were connected to agents.

%

% is the percentage of calls/chats to this service that were answered by agents relative to total number of calls/chats that requested this service.

Average Speed of Answer

Average Speed of Answer is the average time that answered calls/chats spent waiting in the service queue and ringing the desktop before being accepted.

Average Handling Time (Inbound)

Average Handling Time (Inbound) is the average time that answered calls/chats to this service were handled by agents, including hold time and after-call-work time.

Average Talk Time (Inbound)

Average Talk Time (Inbound) is the average talk/chat time for the calls/chats to this service that were accepted.

Average Hold Time (Inbound)

For voice calls, *Average Hold Time (Inbound)* is the average hold time for the calls to this service that were put on hold at any time during their handling. For chats, *Average Hold Time (Inbound)* is the average time in between chat replies.

Average Wrap-up Time (Inbound)

Average Wrap-up Time (Inbound) is the average after-call-work time for the calls/chats to this service.

Number of Calls Made

Number of Calls Made is the number of outbound calls/chats associated with this service, including unanswered calls/chats.

Average Handling Time (Outbound)

For voice calls only, *Average Handling Time (Outbound)* is the average time that answered outbound calls associated with this service were handled by agents. This metric includes hold time and after-call-work time, but it does not include dialing time.

Average Talk Time (Outbound)

For voice calls only, *Average Talk Time (Outbound)* is the average talk time for the outbound calls associated with this service.

Average Wrap-up Time (Outbound)

For voice calls only, *Average Wrap-up Time (Outbound)* is the average after-call-work time for outbound calls associated with this service.

Number of Surveys

These are the *number of surveys* available for calls (both inbound and outbound) and chats associated with this service.

First Call Resolution %

This is the percentage of surveys that indicated first-call or first-chat resolution relative to the number of surveys where the first-call or first-chat resolution received a response.

Contact Satisfaction

Contact Satisfaction is the average of contact satisfaction marks from all surveys where the contact satisfaction question received a response.

Net Promoter Score

The *Net Promoter Score* (NPS) is based on the results of surveys available for calls/chats associated with this service. For more information about NPS, see http://www.netpromoter.com/why-net-promoter/know/

Co-browse

If co-browsing with Surfly is configured, *Co-browse* displays the number of chat interactions with co-browsing sessions handled for this service.

1. REDIRECT 5.3:Contact-center-administrator-guide/CallCenterConfiguration/AuxiliarySkills

1. REDIRECT 5.3:Contact-center-administrator-guide/ServicesandCampaigns/ServiceLevelTab

1. REDIRECT 5.3:Agent-guide/Work/Mobile/Overview

1. REDIRECT 5.3:Contact-center-administrator-guide/CallCenterConfiguration/AuxiliarySkills

1. REDIRECT 5.3:Contact-center-administrator-guide/CallCenterConfiguration/AuxiliarySkills

1. REDIRECT 5.3:Contact-center-administrator-guide/UsersandTeams/SkillLevels

1. REDIRECT 5.3:Scenario-builder-reference-guide/ScenarioBlocks/FindAgent

1. REDIRECT 5.3:Contact-center-administrator-guide/Directory/Softphones

Purpose

The Bright Pattern Contact Center *Supervisor Guide* focuses exclusively on using the Agent Desktop application to perform supervisory tasks such as agent supervision, campaign management tasks, real-time monitoring of key contact center performance indicators and helping agents with call handling. The guide also explains tasks related to real-time campaign management. Note that the same application is also used by contact center agents to provide customer service over the phone. For descriptions of all tasks related to customer service, see the Bright Pattern Contact Center *Agent Guide*.

1. REDIRECT 5.3:Contact-center-administrator-guide/UsersandTeams/Teams

1. REDIRECT 5.3:Contact-center-administrator-guide/ServicesandCampaigns/Outbound-General

1. REDIRECT 5.3:Contact-center-administrator-guide/UsersandTeams/Users

Overview

The Bright Pattern Contact Center *Virtual Queue Tutorial* explains Bright Pattern's virtual queue option, how to configure it, and how enabling it can affect reporting statistics.

Virtual Queuing, also referred to as the *Callback Option*, is an enhancement of the regular automatic call distribution method (ACD) used in inbound call centers. During periods of significant wait times, this option allows customers to hang up the call while keeping their position in the service queue and to receive a callback when it is their turn to be connected to an agent. The benefits of using virtual queuing include:

- **Improved customer satisfaction** – After requesting a callback, customers get back to their normal activities instead of being tied on the phone.
- **Reduced abandonment rates** – Customers who can continue their normal activities are less likely to abandon their service requests (i.e., to ignore the callback).
- **Reduced talk time** – Customers waiting in a virtual queue are less likely to spend any time venting their frustration with a long wait when they are finally connected to an agent.
- **Lower telco costs** – Customers waiting in a virtual queue do not occupy physical voice channels.

An agent receiving a callback reservation notification

How It Works

Bright Pattern Contact Center *Virtual Queue* works in the following way:

For each incoming service call, the system calculates its estimated waiting time (EWT) in the queue. If this time exceeds a threshold EWT value preconfigured for the given service, the system notifies the calling customer about the wait time and offers the customer the option of receiving a callback when it is the customer's turn to be connected to an agent. The customer can request the callback to be made to the phone from which the customer is calling, or to a different number that the customer can enter using the phone keypad. The original live call is then disconnected while the customer’s position in the service queue is maintained by the system as if the customer had remained on the line, hence the name *Virtual Queuing*.

When it is the customer’s turn to be connected to an agent, the system makes an outbound call (callback) to the designated callback number. Upon answer, this call is connected to an available agent.

Initiation of the callback may be done either on prediction that an agent will become available around the expiration of EWT calculated for the given call or via explicit agent reservation.

When agent reservation mechanism is used, the system will wait for an agent to become available before making a call. When the agent becomes available, she is reserved for the given call. The agent is then notified by a pop-up window that she has been reserved for a callback; this window includes the optional checkbox **Dont's show this to me again** should she not want to see the pop-up on future callback reservations.

The incoming callback reservation window

While explicit agent reservation guarantees agent availability to take a callback, it is less efficient in terms of agent utilization as agents will have to spend some time in a reserved state; it can be recommended for services with small numbers of agents where EWT calculation is usually less precise.

When the EWT-based mechanism is used, the callback attempt is made a few seconds before EWT expiration based on the prediction that an agent will have become available by the time the callback is answered by the customer. If an agent does not become available at that time, the answered call is placed in the first position in the service queue to be connected to the next available agent. An interactive voice response (IVR) announcement can be played for the answered callback to prevent the customer from hanging up a call if it cannot be immediately connected to an agent.

Generally, for services with larger pools of agents, the EWT-based mechanism will reliably connect answered callbacks to agents without compromising their utilization.

Subsequent processing of answered callbacks delivered to agents is no different from the processing of calls waiting in the queue.

Overview

The Bright Pattern Contact Center *Virtual Queue Tutorial* explains Bright Pattern's virtual queue option, how to configure it, and how enabling it can affect reporting statistics.

Virtual Queuing, also referred to as the *Callback Option*, is an enhancement of the regular automatic call distribution method (ACD) used in inbound call centers. During periods of significant wait times, this option allows customers to hang up the call while keeping their position in the service queue and to receive a callback when it is their turn to be connected to an agent. The benefits of using virtual queuing include:

- **Improved customer satisfaction** – After requesting a callback, customers get back to their normal activities instead of being tied on the phone.
- **Reduced abandonment rates** – Customers who can continue their normal activities are less likely to abandon their service requests (i.e., to ignore the callback).
- **Reduced talk time** – Customers waiting in a virtual queue are less likely to spend any time venting their frustration with a long wait when they are finally connected to an agent.
- **Lower telco costs** – Customers waiting in a virtual queue do not occupy physical voice channels.

An agent receiving a callback reservation notification

How It Works

Bright Pattern Contact Center *Virtual Queue* works in the following way:

For each incoming service call, the system calculates its estimated waiting time (EWT) in the queue. If this time exceeds a threshold EWT value preconfigured for the given service, the system notifies the calling customer about the wait time and offers the customer the option of receiving a callback when it is the customer's turn to be connected to an agent. The customer can request the callback to be made to the phone from which the customer is calling, or to a different number that the customer can enter using the phone keypad. The original live call is then disconnected while the customer's position in the service queue is maintained by the system as if the customer had remained on the line, hence the name *Virtual Queuing*.

When it is the customer's turn to be connected to an agent, the system makes an outbound call (callback) to the designated callback number. Upon answer, this call is connected to an available agent.

Initiation of the callback may be done either on prediction that an agent will become available around the expiration of EWT calculated for the given call or via explicit agent reservation.

When agent reservation mechanism is used, the system will wait for an agent to become available before making a call. When the agent becomes available, she is reserved for the given call. The agent is then notified by a pop-up window that she has been reserved for a callback; this window includes the optional checkbox **Dont's show this to me again** should she not want to see the pop-up on future callback reservations.

The incoming callback reservation window

While explicit agent reservation guarantees agent availability to take a callback, it is less efficient in terms of agent utilization as agents will have to spend some time in a reserved state; it can be recommended for services with small numbers of agents where EWT calculation is usually less precise.

When the EWT-based mechanism is used, the callback attempt is made a few seconds before EWT expiration based on the prediction that an agent will have become available by the time the callback is answered by the customer. If an agent does not become available at that time, the answered call is placed in the first position in the service queue to be connected to the next available agent. An interactive voice response (IVR) announcement can be played for the answered callback to prevent the customer from hanging up a call if it cannot be immediately connected to an agent.

Generally, for services with larger pools of agents, the EWT-based mechanism will reliably connect answered callbacks to agents without compromising their utilization.

Subsequent processing of answered callbacks delivered to agents is no different from the processing of calls waiting in the queue.

1. REDIRECT 5.3:Agent-guide/Tutorials/Calls/HowtoCollectaVoiceSignature

1. REDIRECT 5.3:Agent-guide/Tutorials/Calls/HowtoWrapUpAfter-callWork