

5.3 Application Notes

Bright Pattern Documentation

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Bria Mobile Softphone Configuration

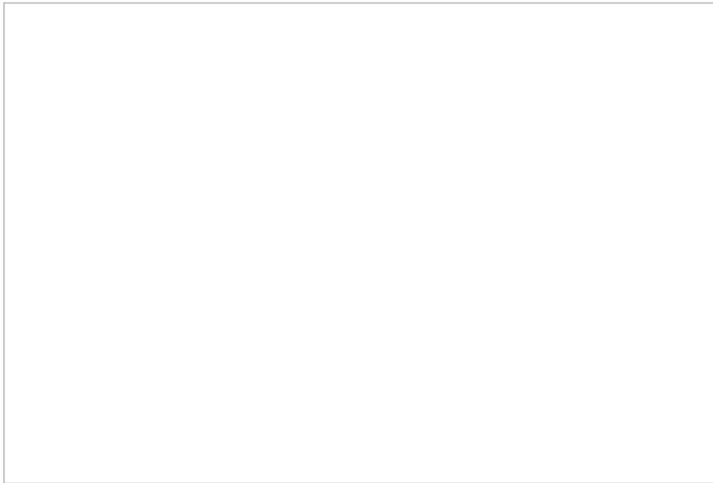
The Bria Mobile softphone app works well for phone calls with Bright Pattern Contact Center software; it minimizes battery drain in standby by using Bria Push Service.

Configuration

In the Contact Center Administrator Application

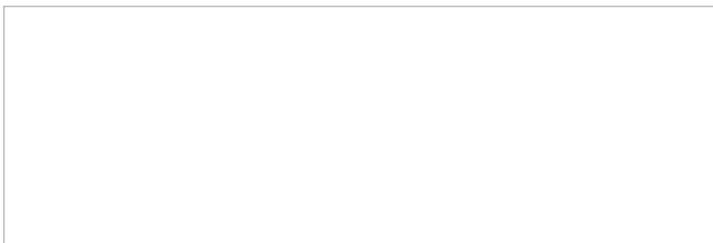
To configure Bria Mobile with Bright Pattern Contact Center, take the following steps:

1. Add a [hardphone](#) account in the Contact Center Administrator application, and edit Properties.



Hardphone Properties

2. In the Authentication tab, make sure the authentication [username](#) is the same as the phone's extension.



Hardphone Authentication tab

3. Note your domain (e.g., from the Properties tab, see "Phone registers as <ext>@<domain>"), extension, and password.

In the Bria Mobile Softphone

In the Bria Mobile app, add a new account. This is done by going to **Settings > Accounts > "+" > Select Provider > User-Defined Generic Accounts > SIP**.

Note that the steps that follow are for User-Defined Generic Accounts. You do not have to select a VoIP provider. Also note that you can only edit account options when the account is disabled.

Section SIP Account

To configure the SIP account, take the following steps:

1. Give your account an *Account Name*.
2. Set the desired *Display as* name.
3. Set the *Username* and *Password* to the same username (e.g., "3001") and password from your configured hardphone account.
4. Set the domain to the hardphone account's domain and add:**5080** (Bright Pattern CCaaS service uses the non-standard SIP port 5080). For example: "example.brightpattern.com:5080"
5. Enable the option *Use Push Notifications* and set the option *Registration Mode* to **Single Device Emulation**.
6. Disable the option *NAT Emulation*.
7. Leave the option *Push Advanced Settings* disabled.

Section Account Advanced

To configure section *Account Advanced*, take the following steps:

1. In section *Network Traversal*, option *Custom configuration*, turn all options off.
2. In section *IP Version*, set option *Wi-Fi IP Version* to **IPv4**
3. Also in section *IP Version*, set option *Mobile IP Version* to **IPv4**.
4. In section *DTMF Type*, make sure option *Send DTMF using* is set to **RFC2833**.
5. In section *Transport and Security*, set option *SIP transport* to **UDP**.
6. In section *SIP Registration*, set options *Wi-Fi Refresh Interval* and *Mobile Refresh Interval* to **30** seconds.
7. In section *TLS Cert Management*, disable option *Verify TLS cert*.
8. In section *SIP Miscellaneous*, leave option *Show Miscellaneous* disabled.

Polycom Hardphone Configuration

These instructions will show you how to configure and register a Polycom hardphone manually on the Polycom Configuration Utility web interface. We are using a Polycom SoundStation IP 6000 as an example.

There are several ways to configure a Polycom phone on the web interface: Simple Setup, Lines settings, and SIP. The following instructions will guide you through Lines settings configuration. **We recommend that you do not use Simple Setup or SIP.**

Prerequisites

In order to configure your Polycom phones with Bright Pattern Contact Center software, you will require a [special SIP address](#); Bright Pattern Operations will create this for you upon request. Note that the address has built-in redundancy (i.e., it contains two servers), so you will only need one SIP address.

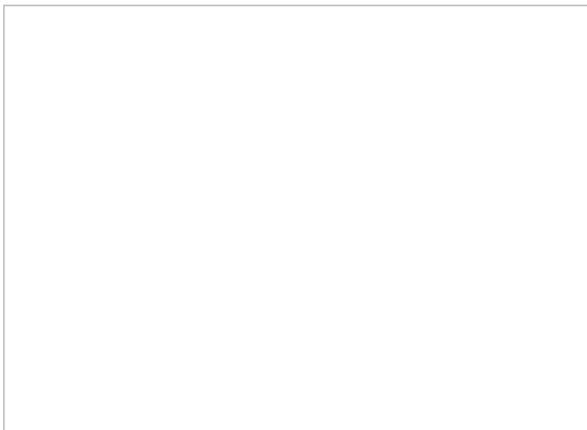
Procedure

Step 1: Locate the IP address, SIP extension number, and password of the Polycom phone

1. On the Polycom phone, hit *Menu > Status > Network > TCP/IP Parameters*, and note the listed IP address.
2. Note the SIP extension number on the display of the Polycom phone.
3. You can locate or set the phone password by logging into */Admin > Setup > Manage > Modify (pencil button) > the SIP extension you wish to register > Phone Settings tab > Common Settings > Phone Password*.

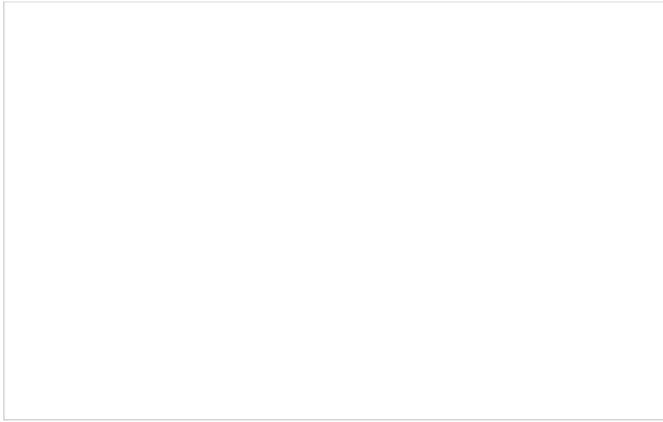
Step 2: Open the phone's configuration utility web interface on a web browser

1. Enter the IP address of the Polycom phone in the address bar of your web browser. # When prompted for credentials, select Admin and enter your password. If you don't know the password or you have never changed it, it is likely "456".



Polycom web interface login screen

2. The phone cannot be in use during configuration. Before proceeding to Step 3, check that the phone is not being used. Note that if the phone is in use, you will not be able to access the configuration utility.
3. We recommend doing a phone backup before proceeding, in case you need to undo what you did. Go to *Utilities > Phone Backup & Restore* and click **Phone Backup**.

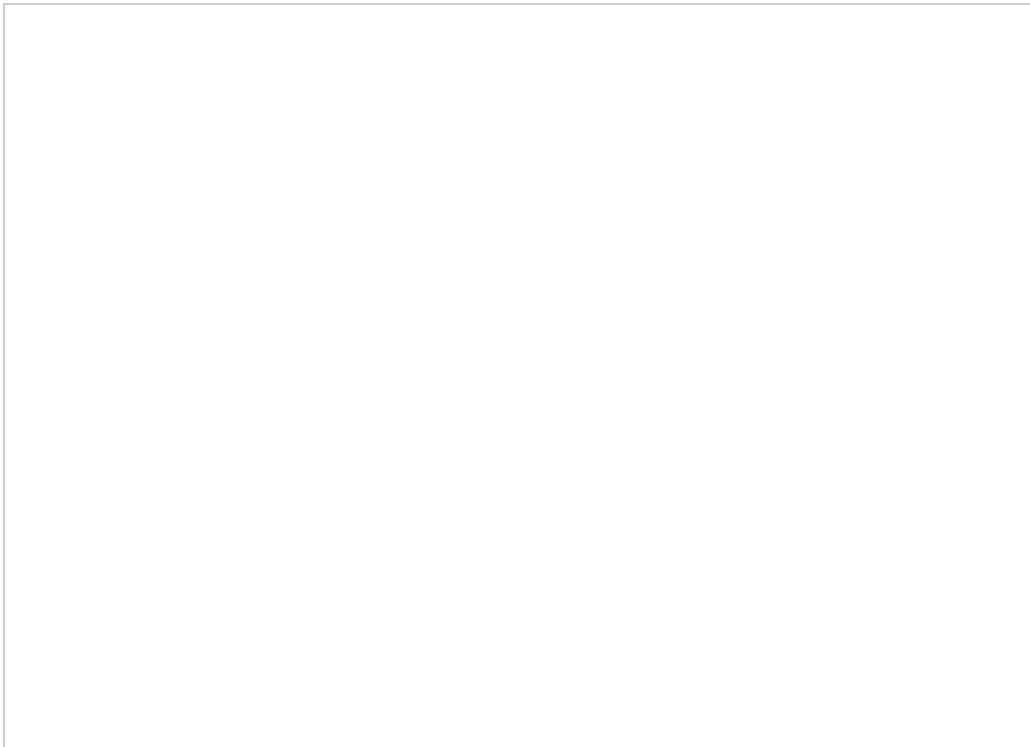


Utilities > Phone Backup & Restore

Step 3: Edit Lines settings

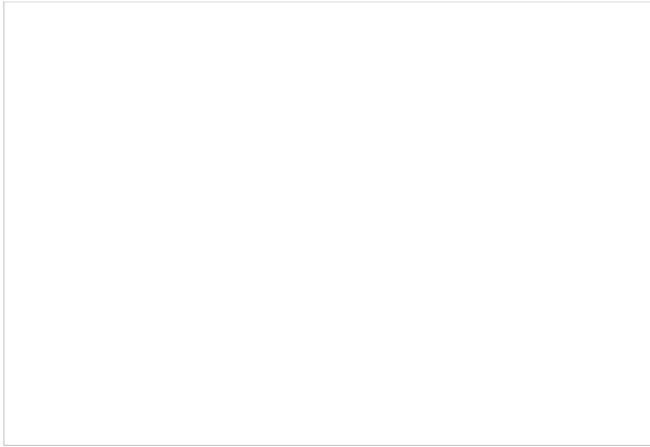
Note that if your phone freezes during any part of configuration, you can unplug/restart it and try again.

1. Go to *Settings > Lines*.



Settings > Lines

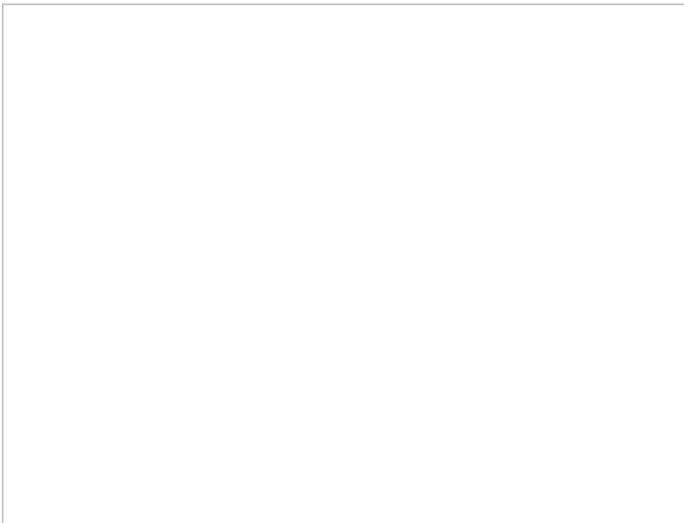
2. Under *Line 1 > Identification*, set:



Settings > Line 1 > Identification settings

1. **Display name:** Any name
2. **Address:** The path to your Polycom phone in the following format: extension number@<tenant>.brightpattern.com.

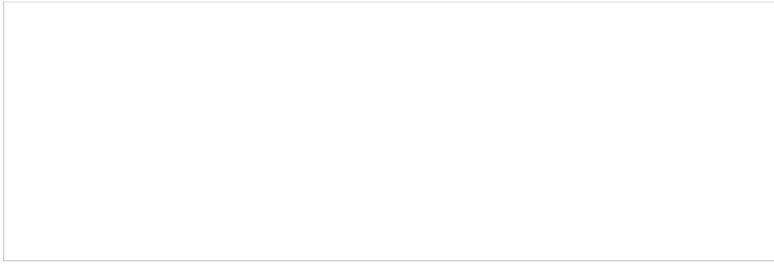
This corresponds to the field “Phone registers dynamically as” in Bright Pattern’s Contact Center Administrator application, section *Directory > Hardphones > <Your extension number> > Properties* For example:



Contact Center Administrator > Hardphones > Properties

3. **Authentication User ID:** The authentication username of your Polycom phone (e.g., “9999”).

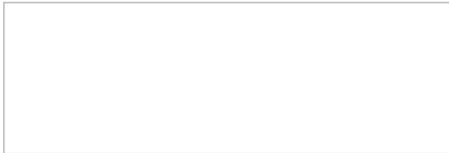
The Authentication User ID and Authentication password correspond to the “Username” and password as set in Bright Pattern’s Contact Center Administrator application, section *Directory > Hardphones > <Your extension number> > Authentication*. For example:



Contact Center Administrator > Directory > Hardphones > <Your extension number > Authentication

4. **Authentication password:** The password of your Polycom phone
5. **Label:** Any; this will be shown on the phone's screen
6. **Type:** Select "Private" or "Shared"
7. **Third Party Name:** Any; OK to leave blank
8. **Number of Line Keys:** Any (e.g., "1")
9. **Calls Per Line:** Any (e.g., "8")
10. **Ring Type:** Select

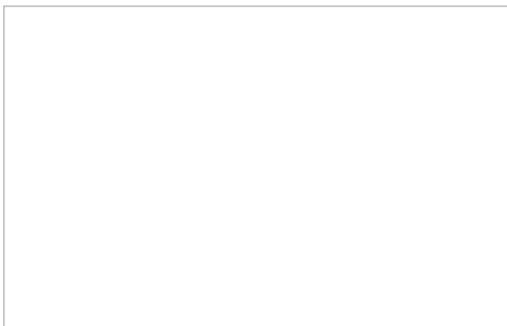
3. Under *Line 1 > Outbound Proxy*, set:



Line 1 > Outbound Proxy settings

1. **Address:** Must be empty (if any value is here, you must remove it)
2. **Port:** Must be "0"
3. **Transport:** Leave as "UDPOnly"

4. Under *Line 1 > Server 1*:

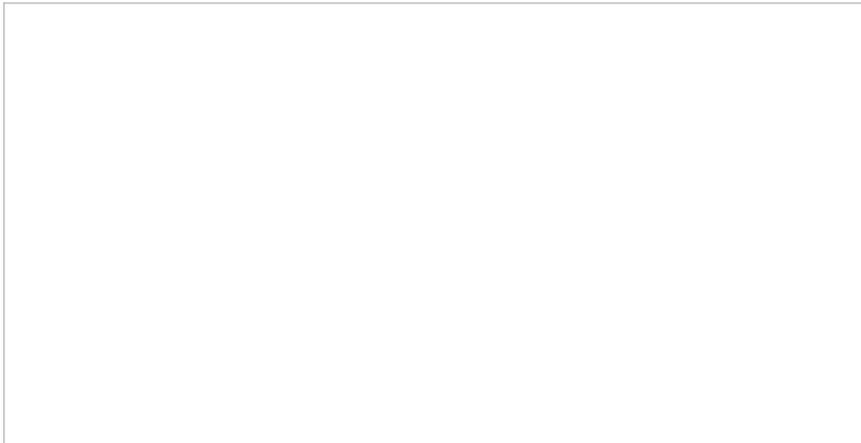


Line 1 > Server 1 settings

1. **Address:** The address in the following format: <tenant>-sip.brightpattern.com (e.g., "example-sip.brightpattern.com"). Note that this address is created by Bright Pattern Operations upon request.
2. **Port:** Set "0" (The default is 0. Do not type any other port number here because it comes from the DNS server automatically.)
3. **Transport:** Select "DNSnaptr". (default).
4. **Expires (s):** The expiration period in seconds - "60" (default is "3600")
5. **Register:** Select "Yes" (if you select "No," the phone will not be registered)
6. **Retry Timeout (ms):** The timeout period in milliseconds (e.g., "0"). The default is 100 ms. If you set "0", the timeout will be set to default.
7. **Retry Maximum Count:** The max number of times to retry (e.g., "3")
8. **Line Seize Timeout (s):** The line seize timeout in seconds (e.g., "30")

Step 4: Check for software updates on the Polycom phone

1. We recommend updating to the latest software on the Polycom phone at least once per year.
2. Still in Polycom's web interface, go to *Utilities > Software Upgrade*.



Utilities > Software Upgrade

3. In *Phone Details*, you will see your current software version. Leave this as-is.
4. Click **Check for Updates**.



Phone Details

5. Now you will see the Software available at Polycom server drop-down list. Select and run the latest version (e.g., "4.0.14.1388D").
6. Click **Install**. The phone will restart. The software update takes about 2–5 minutes.

Polycom phone configuration is now complete.

Cisco SPA Hardphone Configuration

These instructions will show you how to configure and register a Cisco hardphone manually on the Cisco Configuration Utility web interface. We are using a Cisco SPA508G as an example. Note that this example can be used for any Cisco hardphone in the "SPA" model family.

Prerequisites

You should have Bright Pattern Contact Center version 5.2.x or later.

In order to configure your Cisco phones with Bright Pattern Contact Center software, you will require a special **outbound proxy**; Bright Pattern Operations will create this for you upon request. (See Step 5.1.b. in the following procedure.)

Procedure

1. Locate the IP address of the phone

On your phone, press the **Menu** button, and then select the **Network** option; the IP address should be listed here.

2. Check for software updates on the Cisco phone (important)

Make sure you are running the latest firmware version for your phone. We recommend updating your phone at least once per year. For updates, visit the [Cisco Software Download page](#).

3. Perform a factory reset (important)

On your phone, press the **Menu** button, and then select **Factory Reset**. The phone will restart.

4. Open the phone's configuration utility web interface

1. Enter the IP address of the Cisco phone in the address bar of your web browser.
2. In the top right corner of the page, click **Admin Login** and then click **advanced**.

A small rectangular placeholder box containing the text "Cisco-SPA-1.PNG" in blue.

Alternatively, you may navigate directly to the following to get to the same place: **http://<your-phone-IP-address>/admin/advanced**

3. Click **Voice** and then select the extension tab you wish to configure. In this example, we are configuring **Ext 2**.

A large rectangular placeholder box containing the text "Cisco-SPA-2.PNG" in blue.

5. Edit the extension settings

Note: Configuration requires the following settings to be changed. Any settings not specifically mentioned in this step are set by user.

1. In the extension settings, under *Proxy and Registration*, set:
 - **Proxy:** The [access domain](#) of your Bright Pattern tenant, which is found in the Bright Pattern Service Provider application, section *Tenants > Properties*
 - **Outbound Proxy:** The setting created for you upon request to Bright Pattern Operations (e.g., "yourcorporation-sip.brightpattern.com")
 - **Use Outbound Proxy:** Select "yes" (default is "no")
 - **Register:** Select "yes"
 - **Use DNS SRV:** Select "yes"
 - **DNS SRV Auto Prefix:** Select "yes"

Cisco-SPA-3.PNG

2. Under *Subscriber Information*, set:

- **User ID:** The phone extension number (e.g., "1000")
- **Password:** The password of the phone extension, set by user

6. Edit System configuration settings

1. Click the **System** tab to edit system configuration settings.

Cisco-SPA-4.PNG

2. Under *Optional Network Configuration*, set:

- **NTP Enable:** Select "yes"
- **Secondary NTP Server:** Set "0.pool.ntp.org"

Cisco-SPA-5.PNG

Setting up Private S3 Storage

Bright Pattern Contact Center allows you to export audio recordings and screen recordings to external storage servers, such as Amazon Web Services (AWS) S3 or Minio for storage or playback.

This article explains how to 1) set up Minio as S3-compatible local storage, 2) get the access credentials to integrate Bright Pattern Contact Center with Minio, and 3) use those credentials to configure an Amazon AWS integration account.

You can learn more about integration accounts in section [Amazon AWS Integration](#) of this guide.

Procedure

Step 1: Install Minio

You can install Minio on either a Linux- or Windows-based system. After installing the app, you will have the Minio credentials needed for integrating Minio with your contact center as a private S3 storage option.

If Using a Linux-Based System

Docker container:

```
docker run -p 9000:9000 -v /mnt/data:/data -v /mnt/config:/root/.minio minio/minio server /data
```

Linux x86 (CentOS 6 or CentOS 7):

```
wget https://dl.minio.io/server/minio/release/linux-amd64/minio  
chmod +x minio  
./minio server /mnt/data
```

Get credentials

After the app is installed, the console will show these credentials:

- **Endpoint:** http://<hostname>:9000 (e.g., <http://127.0.0.1:9000>)
- **AccessKey:** <generated accesskey>
- **SecretKey:** <generated secretkey>

Copy the Endpoint, AccessKey, and SecretKey. You will be using these credentials next to set up your Amazon AWS integration account in Contact Center Administrator.

If Using a Windows-Based System

1. Download the Minio application.
2. Run:

```
minio.exe server F:\Data
```

Get credentials

After the app is installed, the console will show these credentials:

- **Endpoint:** http://<hostname>:9000 (e.g., <http://127.0.0.1:9000>)
- **AccessKey:** <generated accesskey>
- **SecretKey:** <generated secretkey>

Copy the Endpoint, AccessKey, and SecretKey. You will be using these credentials later to set up your Amazon AWS integration account in Contact Center Administrator.

Step 2: Create a bucket

A bucket is a container for stored objects. Before you can export recordings to your private S3 storage, you first have to create a bucket to store them.

1. Go to the Minio web interface. Note that by default, Minio uses port 9000 for access.
2. Log in to Minio using your AccessKey and SecretKey.
3. Create a new bucket and name it (e.g., "test").

Step 3: Integrate with Minio

After Minio is installed and you have a bucket, you can configure your contact center to work in an integrated manner with Minio. This is done in the Contact Center Administrator application.

Add integration account

1. In the Contact Center Administrator application, go to *Call Center Configuration > Integration Accounts*.
2. Click the **Add** button (+) to add a new integration account of type **Amazon AWS**. (Note that in order to add this account type, the AWS feature must first be enabled for your contact center by your system administrator.)

Add-Amazon-52.PNG



Edit integration account properties

1. Name the integration account (any name).
2. Select the **Use private S3 storage** checkbox.
3. In field **Url**, paste the Minio endpoint that you copied earlier.
4. In field **Access Key ID**, paste the Minio AccessKey.
5. In field **Secret Key**, paste the Minio SecretKey.
6. In field **S3 bucket**, add the name of the bucket you created.
7. Click **Apply** to save your changes.

Minio-Prop-52.PNG



Your S3-compatible private storage option is now set up and ready to be used for storing screen recordings, call recordings, and so forth.

For more information about integration account properties, see the *Contact Center Administrator Guide*, section [Amazon AWS Integration](#).