5.3 Call Center Configuration Overview

Bright Pattern Documentation

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General Settings

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

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

Call Center Configuration > General Settings

Screen Properties

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

Default time zone

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

Default country

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

System Not Ready reason names for

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

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

Agent no answer

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

UI connection loss

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

After call break

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

Logout Pending

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

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

Custom Not Ready reasons

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

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

Agent state upon login

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

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

Auto logout timeout upon connection loss

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

Enter After Call Work

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

Exit After Call Work

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

Enter Break

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

Exit Break

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

Non-call cases URL

This setting can be used to display an external web resource to the agents (for example, a search screen of an external knowledge base). Unlike Web Screen Pop, where a page is displayed with respect to a specific interaction, the web resource specified here will be available to the agent at any time via the Agent Desktop Home Screen. Note that you can override this setting at the team level.

Display name format

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

External number inactivity timeout

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

Agent daily Break time limit

This setting allows you to configure the maximum amount ofBreak time an agent is allowed. Note that Break time is calculated as the sum of all Not Ready times regardless of the reason. This threshold is used for the Break Time Remaining widget in Agent Desktop, section *Home Page*.

Require service on outbound calls

If this setting is selected, agents will be required to select a service explicitly for every manual outbound call they make (i.e., the option *None* will be greyed out).

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

Integration Accounts Overview

Integration accounts enable your contact center to work with third-party systems, such as customer relationship management (CRM) and workforce management (WFM) applications. The following is a list of articles containing integration account types:

- Amazon AWS
- Bot / Chat suggestions engine
- Co-browsing
- External Knowledge Base
- Loxysoft WFM
- Messenger
- Microsoft Dynamics 365
- Natural Language Understanding
- Next Caller
- NICE
- Remote Assistance

- RightNow
- Salesforce.com
- SCIM
- ServiceNow
- Single Sign-On
- Speech To Text
- Statistics Data Receiver
- Teleopti WFM
- Text To Speech
- The Data Group (TDG)
- WFM
- Zapier
- Zendesk

Call Center Configuration > Integration Accounts

Managing Integration Accounts

How to Add a New Integration Account

1. In Contact Center Administrator, go to *Call Center Configuration* > *Integration Accounts*.

2. At the bottom of the screen, click the **add** (+) button. The Types dialog will open.

3. Select the type of integration account to add (see links to various types above).

How to Edit an Existing Integration Account

1. In Contact Center Administrator, go to *Call Center Configuration* > *Integration Accounts*.
2. From the listed accounts shown, select the integration account you want to edit.
3. In the Properties pane that opens, edit properties as desired.
4. Click **Apply** to save your changes.

How to Delete an Integration Account

1. In Contact Center Administrator, go to *Call Center Configuration* > *Integration Accounts*.
2. From the listed accounts shown, select the integration account you want to remove.
3. At the bottom of the screen, click the **delete** (**X**) button.
4. Confirm the deletion and click **Apply** to save your changes.

Notes

Version 1.1 and later of the Transport Layer Security (TLS) encryption protocol is used to ensure the security of the data passed between Bright Pattern and CRM applications.

The reports required for workforce scheduling are configured for automatic generation and delivery via the Scheduled Reports screen of the Contact Center Administrator application.

Identification

Identification settings define how customer interactions (i.e., calls, SMS/texts, mobile, etc.) are handled by your system, how contacts are identified, and how contact information is created and stored for all the interactions that you have.

When identification settings are enabled, agents have immediate access to both new and continuing customer information; this allows interactions to progress quickly and smoothly.

Configuration > Identification

Identification Settings

To view and edit the Identification settings, select the **Identification** option from the Call Center Configuration menu.

Identification settings

The settings are split into two sections, which are described as follows.

Match contact information for incoming calls by performing searches in

Use Internal Contact Database

Selecting the checkbox for *Use Internal Contact Database* enables callers to be identified using data from your contact center's internal contact database.

If you wish to store data in an external database instead of in your internal contact database, make sure the *Use Internal Contact Database* checkbox is not selected. Then click add to specify the desired external database to be searched.

Enable Service continuation for up to __ hours

The service continuation function allows your customers to be connected to the same agent on a repeated interaction attempt. This may be useful in the event that their original interaction has been dropped or when a customer has an immediate follow-up question.

For example, if a customer was connected to Agent A on an inbound voice service and the connection was lost, the customer could call back and be connected once again to Agent A. The customer is able to continue the service with the same agent because the system has kept a *Current Contact* Object (see section The Identification Process) after an interaction has ended.

If the checkbox for *Enable Service continuation for up to* is not selected, there will be no service continuation. The customer who calls back will be connected to any available agent.

Note that this function relies on information in the contact's activity history and only works with the internal contact database (i.e., option "Use Internal Contact Database" must be enabled).

Also note that for continuation to be supported, you also need to use a scenario that includes a Find Agent block with the condition "Specific agent = $(item.continuationUserId)" such as in our scenario-building exercise How to Route Callers to the Last Agent and Provide a Voicemail Option.

Always create contact in Internal Database

Select the checkbox for *Always create contact in Internal Database* to enable contact/account records to be saved automatically in the internal database.

Note that this option will not automatically create contacts for any calls made within predictive/progressive campaigns. The scenario block Bright Pattern Create Object can be used to create contacts automatically for such calls in scenarios associated with disposition(s) where automatic contact creation is desired.

add

Click **add** to add an external database to be searched. Contact information for incoming calls will be matched by performing searches in the external database(s) that you have added.

Select databases to store contact records

Augmentation - search for additional contact details in external databases

Automatically launch augmentation search using current media identifier (phone number or email address)

Select the checkbox for *Automatically launch augmentation search using current media identifier (phone number or email address)* in order to populate your records with external data.

Bright Pattern Contact Center allows contact details to be augmented by data provided by external databases (e.g., an integrated CRM, The Data Group, or Next Caller) in order to provide additional or background information for selected contacts.

Note that data augmentation is enabled for your contact center via integration accounts. For more information, see section Integration Accounts.

The way that the augmented data is displayed and merged with existing contact information is controlled by Augmentation Forms created for your contact center. For more information, see section Augmentation.

Use contact information from identification results to perform augmentation search

Select the checkbox for *Use contact information from identification results to perform augmentation search* in order to use any existing contact details (i.e., name, phone number, email address, etc.) to search external databases for more information.

add

Click **add** to select the external database(s) (i.e., the integration accounts for the external databases) that will be searched for data. A pop-up dialog will list the types of integration accounts that have been configured for your contact center.

Add integration accounts for augmentation

After you have updated the Identification settings, click **Apply** at the bottom of the screen to save your changes or **Reset** to cancel.

Knowledge Base

Knowledge Base is a repository of articles that help agents quickly find answers to customer inquiries and improve response times via using predefined/approved text in email and chat communications.

To work with Knowledge Base, select the **Knowledge Base** option from the **Call Center Configuration** menu.

Note: While the Knowledge Base screen is the main interface for creation and editing of articles, you can also allow some of your agents to contribute to Knowledge Base directly from their Agent Desktops. Such agents, as well as any other users who are expected to contribute to Knowledge Base, must have the *Edit knowledge base* privilege. For more information about user roles and privileges, see section Roles.

Call Center Configuration > Knowledge Base

Using Folders and Subfolders

The list view of the Knowledge Base screen displays existing articles arranged in folders and subfolders.

How to create a folder at the root level

1. Select an existing folder at this level without unfolding it.
2. Click .

How to create a subfolder in a certain folder

1. Unfold and select the folder.
2. Click .

How to create an article in a certain folder

1. Unfold and select the folder.
2. Click .

How to export specific articles/folders

1. Select the articles or folders from the list and click .
2. In the dialog that appears, click **Export** to confirm. Doing so allows you to export the entire Knowledge Base or some selected sections (both folders and articles).

How to export the entire Knowledge Base

1. Click at any time.
2. In the dialog that appears, click **Export All**.

Knowledge Base content is exported in a zipped [YAML](#) file. You can edit the exported content using one of the editors that support YAML, such as [Geany](#).

You can also import content into Knowledge Base. Content should be prepared as a zipped YAML file. To import, click and select the desired .zip file.

Screen Properties

The *Knowledge Base* screen properties are described as follows.

Name

The *name* of the folder or article is mandatory and must be unique within the folder.

Language

Language refers to the language(s) in which the article is written. For chats, language selection is controlled via scenarios. For emails, the system will automatically attempt to detect the language of incoming email messages. If the detection is successful, only articles written in the same language will be offered to the agent as possible replies.

Keywords

Keywords are statements of a customer problem or question that this article will address. In a more general sense, this field can be used for any kind of information that will help agents quickly assess relevance of the article to the interactions that they handle. Content of this field will not appear in the email draft or chat text input field.

Answer

Answer is the text that will be inserted into the email draft or chat text input field if the agent chooses to use this article. To insert a substitution field, click the **Insert $()** button. The following substitution fields can be used:

- *$(user.firstName)* – Agent's first name
- *$(user.lastName)* – Agent's last name
- *$(user.email)* – Agent's email address from agent's user settings; note that this setting is optional and may not have direct relevance to any email services; see section *Users* for more information
- *$(from.name)* – Customer's name (for email interactions, the display name taken from the *From:* field of the email for which the given reply is composed; for chat interactions, the names taken from the *first_name* and *last_name* fields in a pre-chat form)
- *$(from.emailAddress)* - Customer's email address (for email interactions, the email address taken from the

From: field of the email for which the given reply is composed)

- *$(case.number)* – Number of the case this message is related to
- *$(app.emailAddress)* – Email address of the email scenario entry (this is the same address will appear in the *From:* field of any outgoing emails sent via this scenario entry); see section *Scenario Entries* > *Email* for more information
- *$(cursor)* – Position of the input text cursor immediately after the article is inserted

Usage notes

Usage notes are the notes, comments, and suggestions regarding usage of this article. The content of this field will not appear in the email draft or chat text input field.

Services

Services are the services that this article can be used for. The system automatically assigns a service to every customer interaction. When looking for articles, the agent will be able to limit search to the articles associated with the same service.

This is the default article for

This property names the service for which this article will be displayed as a suggested reply in the email draft pane or chat text input field of the agent desktop.

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

Custom Fields

With *Custom Fields*, an agent working on a call with an activity form may use a Knowledge Base article and use its contents to fill the form. When they click the **Use** button, a number of fields on the form will be prefilled with these associated custom field values. Fields may be created in the Knowledge Base Custom Fields subsection of *Case & Contact Management*. When editing a Knowledge Base article, custom fields can be filled or left empty.

An example of a Knowledge Base article with custom fields located at the bottom

Additionally, you may enter values that represent JSON arrays, which then prefill [form text fields](#) (e.g. [“option1”, “option2”, “option3”]. Doing this allows these text fields convert into combo boxes with these values/ options. If a value is not set for the article, the field does not prefill the form.

An example of a JSON array in a custom Knowledge Base field

Calendars

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

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

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

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

Call Center Configuration > Calendars

Screen Properties

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

Day types tab

Name

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

Days

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

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

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

clone

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

Associations tab

Services

Services lists the services that use the given calendar. Select a service from the list to see the service definition.

Hours of operations

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

Hours of Operation

Hours of Operation (HOPs) are the service schedules that you define externally and then assign to services or scenario entries. For more information, see section Calendars and *Administration Tutorials*, section Understanding Hours of Operation (HOP).

To define HOPs, select the **Hours of Operation** option from the *Call Center Configuration* menu.

Call Center Configuration > Hours of Operation

Screen Properties

The *Hours of Operation* screen properties are organized into two tabs: Hours of Operation tab and Associations. Screen properties for both are described as follows.

Hours of Operation tab

Name

The *Name* refers to the HOP name. It is mandatory and must be unique within the contact center.

Hours

Hours specifies the calendars that comprise this HOP with the hours of operation defined for each. By default (no calendars assigned), this schedule will be treated as a 24/7 operation.

To add a calendar, click **add**, select the calendar from the drop-down menu, and specify the operation hours for the days in that calendar. If your contact center does not operate during the days of the given calendar, select **closed**.

You can define a new calendar directly within calendar assignment dialog by clicking**add/edit**.

To remove or edit previously defined hours, hover the cursor over their names.

If your HOP contains calendars with different levels of specificity, the more specific level takes priority over the more generic one(s). The levels of specificity, from more generic to more specific, are weekly, monthly and day of Nth week, yearly, and a specific date. For example, if HOP has the calendars Mon-Fri 9 am – 7 pm, Sat 10 am – 6 pm, and Jan 1^{st} 11am – 5 pm defined, the associated services will be open between 11 am and 5 pm on Jan 1^{st} of every year regardless of what day of the week it is.

If your HOP contains any gaps (i.e., undefined days), Bright Pattern will consider the associated services to be closed during such days. For example, if you have HOP that only have the calendars Mon-Fri 9 am – 7 pm and Sat 10 am – 5 pm defined, the associated service will be considered closed on Sundays.

If your HOP contains two calendars with the same days and with different hours of operation, the resulting hours of operation for such days will be the union of two time intervals. For example, if you have an HOP with calendar Sat 9 am – 3 pm, and with calendar Sat-Sun 10 am – 5 pm, the resulting hours for Saturday in the associated services will be 9 am – 5 pm. One exception is the *closed* check box that overrides any open hours. For example, if you have an HOP with calendar Sat marked as “closed”, and with calendar Sat-Sun 10 am – 5 pm, Saturday will be considered “closed.”

clone

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

Associations tab

Services

In this tab, services that use the given schedule are listed. Select a service from the list to see the service definition.

Associations tab

State Calling Hours

Many countries regulate the hours during which businesses are allowed to contact consumers by phone. In some countries, such calling hours may also be regulated at the state level. To be compliant with such regulations during your outbound campaigns, you can define calling hours at the country level, and if necessary, for each state separately. Note that after you have configured the country and state calling hours, you must explicitly enable the *Comply with State calling hours* function in the calling hours of the campaigns that are supposed to be compliant.

Note: The system provides a number of predefined entries for the US federal calling hours and state calling hours where they are known to be different (more restrictive) than the federal hours. This information is current as of the release of Bright Pattern Contact Center version 3.6 (June 2014). It is recommended that you periodically check the federal and state legislation regarding calling hours, and update these entries as may be necessary.

To define calling hours, select the **State Calling Hours** option from the **Call Center Configuration** menu.

Call Center Configuration > State Calling Hours

Screen Properties

The **State Calling Hours** screen properties are described as follows.

Country code

Country code specifies the code of the country to which this restriction applies. To define a restriction that will apply country-wide, specify the country code and leave the *State name* fields for this entry blank.

for all states

Select the *for all states* checkbox when the country code and other state calling hours properties apply to all states in the country.

State name (as in calling records)

This property specifies the name of the state/province to which the given restriction applies, as defined in the records of your calling lists. At campaign run time, the calling hours will be checked against the calling record state information using this name.

State display name

State display name refers to the name of the state/province to which the given restriction applies, as displayed in the title and the list view of the State Calling Hours screen. Note that you can only enter this name if you defined the *State name (as in calling record)* property.

Calling hours

Calling hours are configured in the same way as they are configured in Hours of Operation. The same rules apply in case of possible duplicates. If there is a gap in the definition of calling hours, the system will default to the country-wide setting for the corresponding days.

Auxiliary Skills

In Bright Pattern Contact Center, distribution of service interactions to agents is based on matching the skills requested by the incoming interaction with the skills possessed by agents. Skills are typically associated with services that the customers are trying to get. Thus, when you configure a service, a default skill representing this service is automatically created by the system. When you assign a team to this service, the default service skill is automatically assigned to all agents of this team.

However, in many cases, a single skill may not sufficiently describe customer's expectation for the requested service. For example, a general support service may have agents specializing in particular products. In this case, in addition to the default service skill for Support, you may need to define skills for Product Type and assign them to the agents who can provide them for the given type of product. Such additional skills that are defined and assigned manually are referred to as auxiliary skills.

Auxiliary skills also can be used for group-based routing. Consider personal routing, where the system attempts to distribute an interaction to the agent who has handled the previous interaction of the same customer. If this agent is not available, the interaction can be then routed to a group of agents who share a particular property with that specific agent (e.g., work in the same office). Such common properties can also be described as auxiliary skills. For more information, see the description of the Find Agent block in the *Scenario Builder Reference Guide*.

Note that, starting from version 5.1, the language skills are defined separately via section Language Skills. In previous versions of Bright Pattern Contact Center, languages could be configured in Auxiliary Skills. If you configured languages previously, they will be displayed in Auxiliary Skills as "Language - Old."

Note: Auxiliary skills are supported for voice and chat media channels only.

Call Center Configuration > Auxiliary Skills

How to Create Auxiliary Skills

To create auxiliary skills, select **Auxiliary Skills** from the *Call Center Configuration* menu. In Bright Pattern Contact Center, related skills are organized in groups. To set up a new group of related skills, click **add skill group** and enter the group name (e.g., *Accounting*). To define a skill within this new group, click **add skill** and enter the skill name (e.g., *AP*). Repeat the last step for every accounting skill used in your contact center. Note that skill names must be unique within the entire contact center configuration and not just within the group. Note also that auxiliary skill names may not coincide with names of any services since the latter are used for default service skills.

To edit or delete previously defined skills and skill groups, hover the cursor over their names and click either **edit** or **delete** . **Please note**: When you delete a group, all skills within this group will be deleted as well. Unlike the default service skills, auxiliary skills must be assigned to agents explicitly. See section Skills Levels for more information.

Language Skills

Language Skills, like Auxiliary Skills, allows you to select language skills for your agents that can be configured in Skill Levels. For example, a customer may request a service in a specific language. In this case, in addition to default service skills, you need to select a language skill and assign it to the agents who can provide the requested service in this language.

In *Language Skills*, languages may be selected from a preconfigured drop-down menu. Additionally, some of these languages are auto-detectable in emails; detectable languages will have a checkmark in the *Auto-Detectable in Email* column.

In previous versions of Bright Pattern Contact Center, languages could be configured in *Auxiliary Skills*. If you configured languages previously, they will be displayed in *Auxiliary Skills* as "Language - Old."

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

Language skills may be selected in *Call Center Configuration*

How to Add Language Skills

To select language skills, select **Language Skills** from the *Call Center Configuration* menu. To add a new language skill, click the **add** button and select the language from the drop-down menu. To edit or delete languages, hover the cursor over their names and click either **edit** or **delete** . Unlike the default service skills, language skills must be assigned to agents explicitly. See section Skills Levels for more information.

Choose languages from the drop-down menu

Notes About Languages

“Chinese – Traditional Han” and “Chinese – Simplified Han” are mapped to *Chinese - Taiwan* and *Chinese - China*, respectively. Note that we will keep our current list of Chinese languages (borrowed from Java locales – China, Hong Kong, Macau, Singapore, Taiwan) and will not switch to the conventional classification of dialect groups (Mandarin, Wu, Gan, Xiang, Min, Hakka, Yue).

Languages Skills in Email

When configuring services for email in Scenario Entries, language skills are an important element. The list of languages in *Optional Filters* is limited to the configured language skills that are auto-detectable.

If the **Set language skill based on detected language** checkbox is selected, emails with undetectable languages will be sent to the default email service regardless of keyword matches. Moreover, if the language of an email is detectable but not on the list of configured languages of the call center, the email will be sent to the default email service.

For more information on language skill settings for email, see Services Tab in *Email*.

Audio Treatments

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

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

Select the situation for which you wish to use your custom audio treatment. You can click the audio icon to listen to the currently used message. To replace the current treatment with your new custom treatment, click **upload** and select the desired voice file.

Note: The audio content must be encoded in uncompressed PCM 16-bit format.

To adjust the system-wide volume settings for a given audio treatment, use the corresponding volume slider to set the appropriate level.

Call Center Configuration > Audio Treatments

Screen Properties

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

Hold and queue music

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

Call in queue notification

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

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

Internal chat notification

Internal chat notification indicates the arrival of an internal chat interaction.

External chat and preview record notification

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

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

New chat message notification

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

Agents will be hear the notification tone for a new chat message *only* if the chat window is not active (i.e., the conversation tab is unpinned in Agent Desktop, or Agent Desktop is open in a separate browser tab and is active, or the agent's web browser is minimized).

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

DTMF suppression sound

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

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

While logged on external phone

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

- **incoming call** – Equivalent to ringing tone
- **call waiting - incoming call while talking** – Indication of another incoming call while talking
- **line idle** – Indication of an open but idle line that does not have an active call

While logged on a softphone

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

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

Shared Voice Segments

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

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

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

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

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

Call Center Configuration > Shared Voice Segments

Configuring a New Voice Segment

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

If you have a segment prerecorded as a voice file:

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

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

If your voice message will be recorded over the phone:

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

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

Using a Shared Voice Segment in a Scenario

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

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

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

Voicemail

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

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

Note: Regarding the storage of voicemails, they are treated the same way as call recordings are. That is, there is no limit on the number of recordings; they are stored the same way as regular voice recordings and the retention duration is the same as for call recordings.

Call Center Configuration > Voicemail

Screen Properties

The *Voicemail* screen properties are described as follows.

Voicemail forwarding timeout

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

Voicemail scenario

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

Prompt for “user at extension” message

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

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

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

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

Prompt for “is not available…” message

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

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

Use secure voicemail

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

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

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

From display name

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

From address

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

Subject

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

Message

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

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

Phone Devices

This section is where you can configure the phone devices available to agents in your contact center, as well as set the default device type for newly created agents. Certain situations require the flexibility to direct agents to specific devices, including, but not limited to, the following:

- Your agents are assigned hardphones and you want to disable all other options.
- You want to restrict agents to secure phone options only (i.e., WebRTC and the Secure Agent Helper Application), ensuring unsecure options are never used.
- You are in the process of upgrading to the Secure Agent Helper Application and need a secure, out-of-the-box option to use in the meantime (i.e., WebRTC).

Note that certain phone device options may not be available in your contact center. For more information, contact your service provider. Additionally, the following functionalities are not supported **unless** the BPClient plugin is installed:

- Screen monitoring (i.e., a user can monitor others, but they cannot be monitored)
- Screen recording
- The GUI popup for inbound interactions (i.e., outside of the web browser window)
- Client-side diagnostic logging (i.e., BPClient.log)
- Audio notifications through all audio devices (e.g., ringing on all devices)
- The Simplified Desktop .NET API
- Business user presence detection (i.e., system input activity tracking)
- The G.729 codec
- For Salesforce.com integrations, the CTI phone in Salesforce Classic

Note: In order to use screen monitoring, both users (i.e., the host of the monitoring and monitored user) should have the BPClient plugin installed.

For more information about configuring the best options for your contact center, see*Administration Tutorials*, section Phone Devices.

Phone Devices

Settings

Note: If you do not see some of the following options, they are not available for your contact center. For more information, contact your service provider.

Allow the following phone device options in Agent Desktop applications

Phone via soundcard/headset (Agent Helper Application)

This option is a softphone application working as a phone in user computers. When selected, the extension number assigned to users in configuration will be their phone number for the duration of the login session.

Secure phone via soundcard/headset (Secure Agent Helper Application)

This option, while similar to the Agent Helper Application option, provides encrypted audio. When this option is selected, the extension number assigned to users in configuration will be their phone number for the duration of the login session.

Secure phone via browser audio (Web RTC)

This option utilizes WebRTC, an open-source project that allows secure (i.e., encrypted) real-time communications in web browsers. Note that this option is available only for web browsers that support WebRTC (e.g., Internet Explorer (IE) does **not** support WebRTC). If your contact center's agents are using Chromebooks with the Chrome web browser, WebRTC is an ideal option. Additionally, this option may be selected by users if they experience problems with their other softphone devices. When users select this option, the extension number assigned to them in configuration will be their phone number for the duration of the login session. For more information, see section WebRTC Considerations in this guide.

Internal hardphone (extension number), number specified by user

This device is a hardware phone connected directly to the system. It can be a SIP-based phone, such as Polycom SoundPoint. Users will enter the desired phone number in the field next to this option in the Agent Desktop application.

Internal hardphone (extension number), default number for user

This device is the hardware phone permanently assigned to the user in section Users & Teams > Users > Contacts tab.

External phone (PSTN number)

This option allows a public phone number that can be dialed from the system to be entered by users in the Agent Desktop application, section Settings > Phone Device. Depending on your system configuration, once established, the external phone connection may be kept open even when the remote party hangs up. This is a normal behavior that is sometimes used to optimize the utilization of the established PSTN phone connections.

If this option is used in your contact center, users will not need to hang up the phone (i.e., termination of a currently active call will be indicated using a special tone). The arrival of the next call will be announced both visually via the Agent Desktop application and via another special tone on the user's open phone connection.

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

Dial-in and keep line open (nailed connection)

This option allows users to establish a phone connection with the system from any phone upon login and use this established physical connection for the handling of all subsequent calls within their login session. If this option is selected, the phone number to call for the initial connection should be provided to the user.

Login without phone

This option may be selected for users who work with text-based interactions only (i.e., chat and email).

Default device for new agents

This setting allows you to define which phone device is the default for newly created agents. For new contact centers, the default device is the Secure Agent Helper Application. Note that agents will be required to select an audio device upon the first/next login to the Agent Desktop application in the following situations:

- A previously unused option is enabled for your contact center
- A previously available option is disabled for your contact center

Omni-Channel Routing

Bright Pattern Contact Center enables contact center agents to handle multiple interactions of different media types simultaneously. The agent's availability to handle an interaction is determined via a capacity model that takes into account how much of the agent's capacity is occupied by interactions of various media types that the agent is already handling, how much spare capacity the agent must have to be able to handle an interaction of a specific media type, and relative priorities of various media types.

To configure agent capacity, select the **Omni-Channel Routing** option from the **Call Center Configuration** menu.

Call Center Configuration > Omni-Channel Routing

Screen Properties

The *Omni-Channel Routing* screen properties are described as follows.

Capacity share taken by each interaction

This setting specifies the percentage of total agent capacity occupied by a single interaction of the given media type.

In the default settings shown, the capacity share is:

- Voice: 100%
- Preview: 100%
- Chat: 25%
- Email: 25%

Using those capacity share settings as an example, an agent handling a single call will be 100% busy, while an agent handling a single chat session will have 75% spare capacity (i.e., 100% – 25% = 75%).

For multimedia interactions such as rich contact, the total capacity share is the sum of capacity shares of all media types involved.

Required spare capacity to receive interaction

This setting specifies the percentage of spare capacity that the agents must have to be delivered an interaction of the given media type.

In the default settings shown, the required spare capacity is:

- Voice: 50%
- Preview: 50%
- Chat: 25%
- Email: 100%

Using those required spare capacity settings as an example, an agent handling three service chats may still receive another chat, but not email because the agent's spare capacity of 100% is only sufficient for the agent to get one more chat.

Precedence

Precedence is the order in which interactions of the given media type will be distributed to agents relative to interactions of the other media types (i.e., when competing for the same available agent).

In the default settings shown, the precedence is:

- Voice: 1
- Preview: 4
- Chat: 2
- Email: 3

Using those precedence settings as an example, if an agent becomes simultaneously available for a chat and an email interaction waiting in queue, the chat interaction will be delivered to that agent first, regardless of how long either of those interactions has been waiting in queue.

This parameter can be set to the same value only for voice and chat. If it is set to the same value, the delivery order of voice and chat interactions will be determined by only their position in queue. Generally, it is recommended that each media type has a different precedence value.

How the System Routes Interactions

When a new interaction arrives and its skill requirements are identified, the system will look for agents with matching skills and sufficient spare capacity (i.e., occupied at less than 100 – *Required spare capacity to receive interaction* of the given media type).

If multiple agents satisfying these conditions are found, the system will select one of these agents using the following criteria in the specified order:

1. The agent with the highest skill level(s); the highest level is determined by the following formula:

   Service Skill Level x 100 + (*sum of Auxiliary Skill Levels*) / 100 + *no. of auxiliary skills*.

2. The least busy agent at the moment; based on *Capacity share taken by each interaction* currently processed by this agent

3. The longest idle agent; based on the sum of times of continuous *Ready* and *Not Ready* states since the last handled interaction

4. The least occupied agent; based on agent occupancy since login; occupancy is defined as:

   Busy time / login time – Not Ready time

   In that instance, *Busy time* is the sum of handling times of all interactions processed by the agent multiplied by *Capacity share taken by each interaction*, depending on the media type.

When an agent's load decreases (an agent completes processing of an interaction), the system will look for interactions with matching skill requirements that the agent may have sufficient capacity to handle. The interactions will be considered in the order of *Precedence*. If multiple interactions within the same precedence are found, the system will select one of these interactions using the following criteria:

- For voice and chat, the interaction with the highest value of *(priority x wait time)*; for more information, see the description of the Set Priority block in the *Scenario Builder Reference Guide*
- For emails, interaction with the highest priority; in case of multiple interactions of the same priority, the closest one to the SLA breach.
- For preview records, the record is determined by the order in which records are selected within a campaign.

For more information about how routing happens within scenarios, see the *Scenario Builder Reference Guide*, section Find Agent.

Chat Settings

To configure settings specific to handling of customer chat interactions, select the **Chat Settings** option from the *Call Center Configuration* menu.

Call Center Configuration > Chat Settings

Screen Properties

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

Customer Inactivity Timeout

This timeout is the period of time that the system will wait for a chat response from the customer before closing the chat session. The default value is 10 minutes.

Agent Ramp-up Interval

If you expect your agents to handle multiple chat sessions simultaneously, this setting allows you to introduce a delay in arrival of additional chats to an agent when the agent becomes *Ready* after logging in or returning from a break. For example, if you set the ramp-up interval to 5 and assuming there are incoming chat interactions waiting in queue, an agent becoming *Ready* will receive the first chat immediately and will have five seconds to greet the customer before receiving the next chat. When accepting that second chat, the agent will have another five seconds before receiving another one, and so forth, until the agent gets the maximum number of chats defined by the omni-channel routing configuration.

No response timeout for initial outbound chat

For outbound chat interactions initiated by the agent, this setting specifies the period of time (in minutes) that the system will wait for a chat response from the customer before closing the chat session.

Inactivity warning message

This setting specifies the text of the inactivity warning message that the customer will receive before her chat session will be closed automatically unless she resumes chatting. This message is sent at half the time of the specified inactivity timeout. For example, if the *Customer Inactivity Timeout* is set to 14 minutes, this warning message will be sent in 7 minutes.

Inactivity timeout message

This setting specifies the text of the message that the customer will receive after automatic closure of her chat session upon expiration of the *Customer Inactivity Timeout*.

Chat ended message

This setting specifies the text of the message that tells the customer that the chat has been terminated.

Party joined message

Using variables, this field specifies the text of the message that the customer will receive when an agent or other user (*$(name)*) has joined the chat interaction (e.g., "*$(name)* has joined the session.")

Party left message

This field specifies the text of the message that the customer will receive when an agent or other user (*$(name)*) has left the chat interaction (e.g., "*$(name)* has left the session.")

Message for invitation to chat on social media

Using variables, this field specifies the text of the message that the customer will receive when an agent or other user (*$(name)*) invites the customer to continue the conversation on a different media channel (e.g., "To continue via *$(channel)*, please *$(link_click here)*"). This option is available for tenants that have configured integration accounts for those such channels (e.g., Facebook Messenger, LINE, Telegram, Viber, etc.).

Email Settings

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

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

Note the following:

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

Email Header and Footer

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

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

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

Email Settings > Email Header and Footer

Header and Footer Screen Properties

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

Language

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

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

Header

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

Footer

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

Insert $()

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

Remove

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

SMTP Configuration

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

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

Email Settings > SMTP Configuration

SMTP Configuration Screen Properties

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

System sender display name

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

System sender email address

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

SMTP server hostname

SMTP server hostname specifies the SMTP server host name.

SMTP server port

SMTP server port specifies the SMTP server port.

Connection security

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

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

Server requires authentication

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

Username

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

Password

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

Check settings

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

Password Recovery Template

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

Email Settings > Password Recovery Template

Password Recovery Template Screen Properties

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

Subject

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

Message

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

You can use the following variables in this text:

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

Chat Transcript Template

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

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

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

Email Settings > Chat Transcript Template

Chat Transcript Template Screen Properties

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

System sender display name

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

System sender email address

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

Subject

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

Message

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

You can use the following variables in this text:

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