5.3 Scenarios

Bright Pattern Documentation

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Scenarios Overview

Scenarios define the logic of automated interaction processing in your contact center. Execution of a scenario with respect to a specific interaction is triggered by a particular event, such as the arrival of a call at a specific access number or the initiation of a chat session from a specific web page; these scenarios are executed by the Scenario Engine.

Scenarios can perform many different automated actions. For example, with respect to an inbound call, scenarios can collect additional information via Interactive Voice Response (IVR), identify the requested service, and distribute the call to one of the qualified and available contact center agents. Additionally, should a scenario failover occur (i.e., a Scenario Engine fails while processing a Voice scenario), the scenario will be transferred to a backup Scenario Engine; this will restart the scenario from the last executed block and prevent active, connected calls from being disconnected.

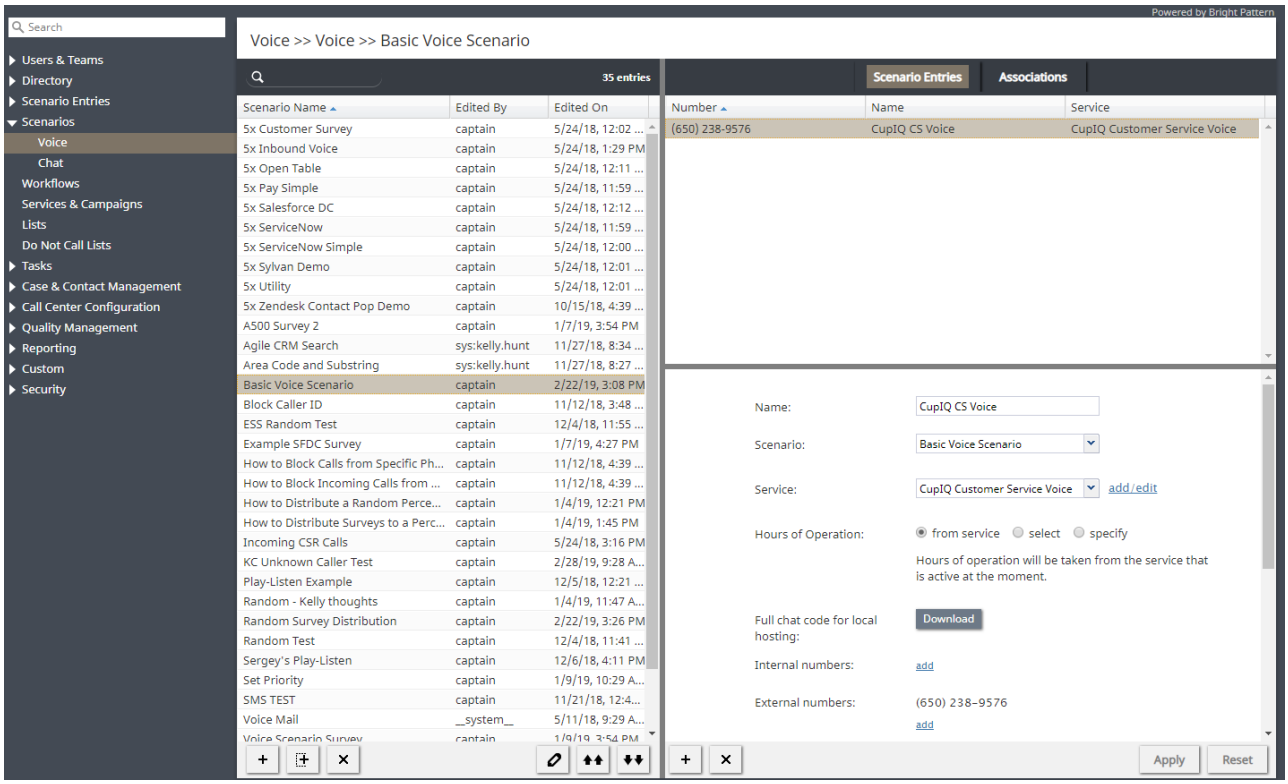
The list in the left pane of the scenario view displays the existing voice scenarios. If a scenario is being edited by someone else at the moment, the name of the editor will appear in the *Currently Edited By* column.

For further information, see Scenario Builder Overview in the *Scenario Builder Reference Guide*.

Sections

The following is a list of sections found in the Contact Center Administrator application, section Scenarios.

- Voice
- Chat



Scenarios

How to Create, Edit, and Delete Scenarios

To create a scenario:

1. First select the media type of the interactions that this scenario will process (voice or chat).
2. In the scenario list view, click the **Add scenario** button at the bottom of the list.

To edit a selected scenario:

1. Click the **Edit scenario** button at the bottom of the list.

To delete a scenario:

1. Click the **Delete scenario** button at the bottom of the list.

Clicking either the **Add scenario** button or the **Edit scenario** button will open the Scenario Builder application in a new browser window or tab. The Scenario Builder application includes all the control elements that may be used in automated interaction processing.

How to Use Scenario Templates

Bright Pattern Contact Center provides a number of scenario templates for some standard functions, such as virtual queue and compliant telemarketing calls. Depending on the type of scenario your are working on, it may be easier to select a corresponding template and customize it to the requirements of your contact center, as opposed to creating a scenario from scratch.

To create a scenario using a template:

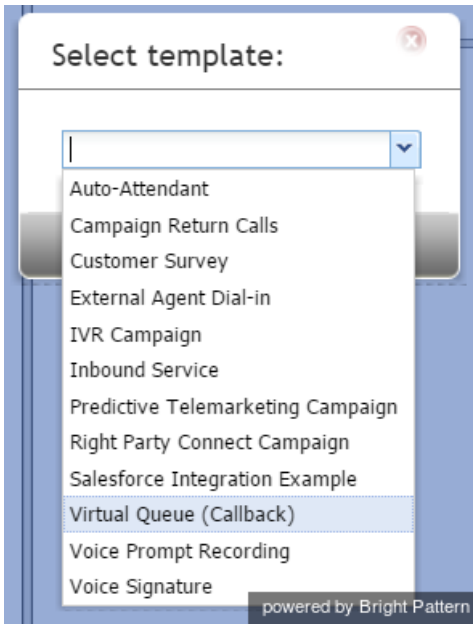
1. Click the **Add from template** button, which will open the *Select template* window.

The *Select template* window will offer a drop-down menu with the following templates from which to choose:

- Auto-Attendant
- Campaign Return Calls
- External Agent Dial-in
- IVR Campaign
- Inbound Service
- Predictive Telemarketing Campaign
- Right Party Connect Campaign
- Salesforce Integration Example
- Virtual Queue (Callback)
- Voice Prompt Recording
- Voice Signature

These templates are described in section Voice of this guide.

Select the desired template, modify the content as needed, and save it as your new scenario.

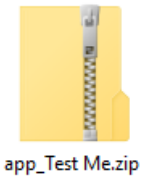


Select a scenario template from the list given

How to Export and Import Scenarios

To export a scenario:

1. First, select the media type of the scenario you will export (i.e., voice or chat).
2. In the scenario list view, select/highlight the name of the scenario you wish to export.
3. After selecting the desired scenario, click the **Export scenario** button. Note that the file will download as soon as you select this button.
4. The exported file will be in .ZIP format.



An exported scenario file

To import a scenario:

1. Before importing a scenario, note that the file should be in .ZIP format (i.e., the same format as an exported scenario).
2. Select the media type of the scenario you will import (i.e., voice or chat).
3. In the scenario list view, click the **Import scenario** button, which will open the *Import Scenario* window.
4. In the *Scenario name* field, enter the name you would like to give the imported scenario.
5. In the *Import from* field, click the **Browse** button to find and select the file you would like to import.
6. After naming and selecting the file, click the **Import scenario** button.

Import scenario window

Voice

To create or edit voice scenarios, select the **Voice** option from the *Scenarios* menu.

You can use the right pane of the **Scenarios > Voice** view to manage associations of voice scenarios with access numbers (i.e., to create and edit dial-in scenario entries).

Screen Properties

The **Voice** screen properties are organized into two tabs: Scenario Entries and Associations. They are described as follows.

Scenario Entries tab

List of dial-in scenario entries

This is a list of the dial-in scenario entries where the selected scenario is used.

Note that if a scenario is associated with more than one number within the same entry, only one number will be displayed in the list. If both external and internal access numbers are associated with a scenario within the same entry, the internal number will be displayed. To see the full set of numbers associated with a selected scenario within the same entry, see the entry properties below the list.

Dial-in scenario entry properties

Dial-in scenario entry properties are the properties of the dial-in scenario entry selected in the *List of dial-in scenario entries*. For a description of these properties, see section Scenario Entries - Dial-in.

You can edit these properties or define a new entry for the selected scenario in this view.

Associations tab

List of associations

List of associations lists all contact resources that are referred to in this scenario, such as skills and services. This may be useful, for example, when you use the same scenarios in several separate environments (e.g., development, staging, and production).

Voice Scenario Templates

The following scenario examples (templates) are available to support the development of voice scenarios:

Auto-Attendant

This scenario fragment connects an incoming call to an extension number that the caller enters via IVR.

Campaign Return Calls

This scenario can be used to process inbound calls that customers make in response to missed campaign calls. The scenario offers an opt-out option to the callers.

Customer Survey

This scenario fragment prompts the customer to evaluate the call that just ended using the standard first call resolution, customer satisfaction, and net promoter score parameters.

External Agent Dial-in

This scenario is started when an agent logs into the system with optionDial-in and keep line open. The scenario collects the info necessary for user authentication and plays a confirmation message.

IVR Campaign

This scenario is started when a call attempt from an automatic (IVR) outbound campaign is answered. The scenario sets a disposition and plays a message to the called party.

Inbound Service

This scenario routes an inbound service call. The scenario checks call arrival time against service hours, offers service selection, routes calls to a qualified agent based on selected service parameters (skills), and performs a screen-pop.

Predictive Telemarketing Campaign

This scenario is started when a call attempt from a predictive outbound campaign is answered. In compliance with the U.S. telemarketing regulations, the scenario attempts to distribute the answered call to an agent within the compliance time (2 seconds). Calls that cannot be answered within the compliance time are routed to an interactive voice response (IVR) script that offers an opt-out option to the called party. Called parties who opt out are added to the internal DNC list.

Right Party Connect Campaign

This scenario is started when a call attempt from a Right Party Connect (RPC)predictive outbound campaign is answered. The scenario verifies whether the person who answers the call is the intended party, and if so, connects this call to an agent. Otherwise, the scenario verifies if the intended party is unavailable or this is a wrong number and sets the corresponding disposition.

Salesforce Integration Example

This scenario returns Salesforce data based on the case number that the caller provides via IVR and provides it as a screen pop to the selected agent.

Virtual Queue (Callback)

This scenario fragment implements the virtual queue function for an inbound/blended service.

Note that this template is designed to support callback numbers of the North American Dialing Plan (NDAP) only.

Voice Prompt Recording

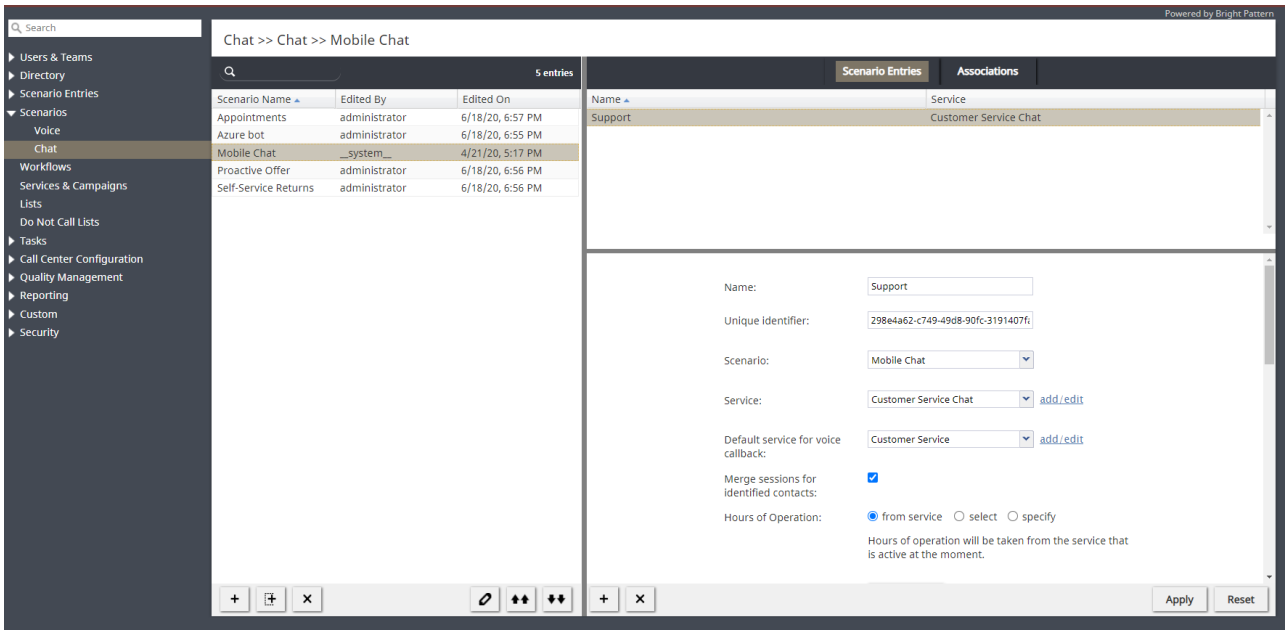
This scenario facilitates over-the-phone recording of a voice message that is stored as a shared voice segment and can be used in other scenarios (e.g., in automatic outbound campaigns). For more information, see section Shared Voice Segments.

Voice Signature

Voice Signature is an example of an IVR script that the agent can conference into a customer call to facilitate collection of customer's voice signature. For more information, see the description of property *Enable voice signature flag* in section Services and Campaigns - Properties Tab.

Chat

To create or edit chat scenarios, select the **Chat** option from the *Scenarios* menu. This covers Zendesk live chat as well as Salesforce.com chat integrations. Upon selecting **Chat**, your screen will be updated as shown.



You can use the right pane of the *Scenarios* > *Chat* view to manage associations of chat scenarios with web pages (i.e., to create and edit chat scenario entries).

The **Chat** screen properties are provided in two tabs: **Scenario Entries** and **Associations**. The properties for each tab are described as follows.

Scenario Entries tab

List of Messaging/Chat Scenario Entries

This is a list of the Messaging/Chat scenario entries where the selected scenario is used.

Messaging/Chat Scenario Entry Properties

These are the properties of the messaging/chat scenario entry selected in the *List of Messaging/Chat scenario entries*. For a description of these properties, see section Messaging/Chat.

You can edit these properties or define a new entry for the selected scenario in this view.w.

Associations tab

List of associations

List of associations is a list of all contact resources that are referred to in this scenario, such as skills and services. This may be useful, for example, when you use the same scenarios in several separate environments (e.g., development, testing, and production).

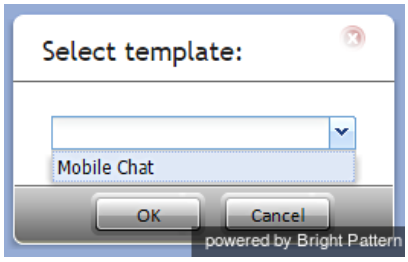
Chat Scenario Templates

A template is a great place to start if you have not already created a chat scenario, or if you need a quick way to create a new scenario.

In the following scenario example, the **Mobile Chat** template is used to support the development of chat scenarios.

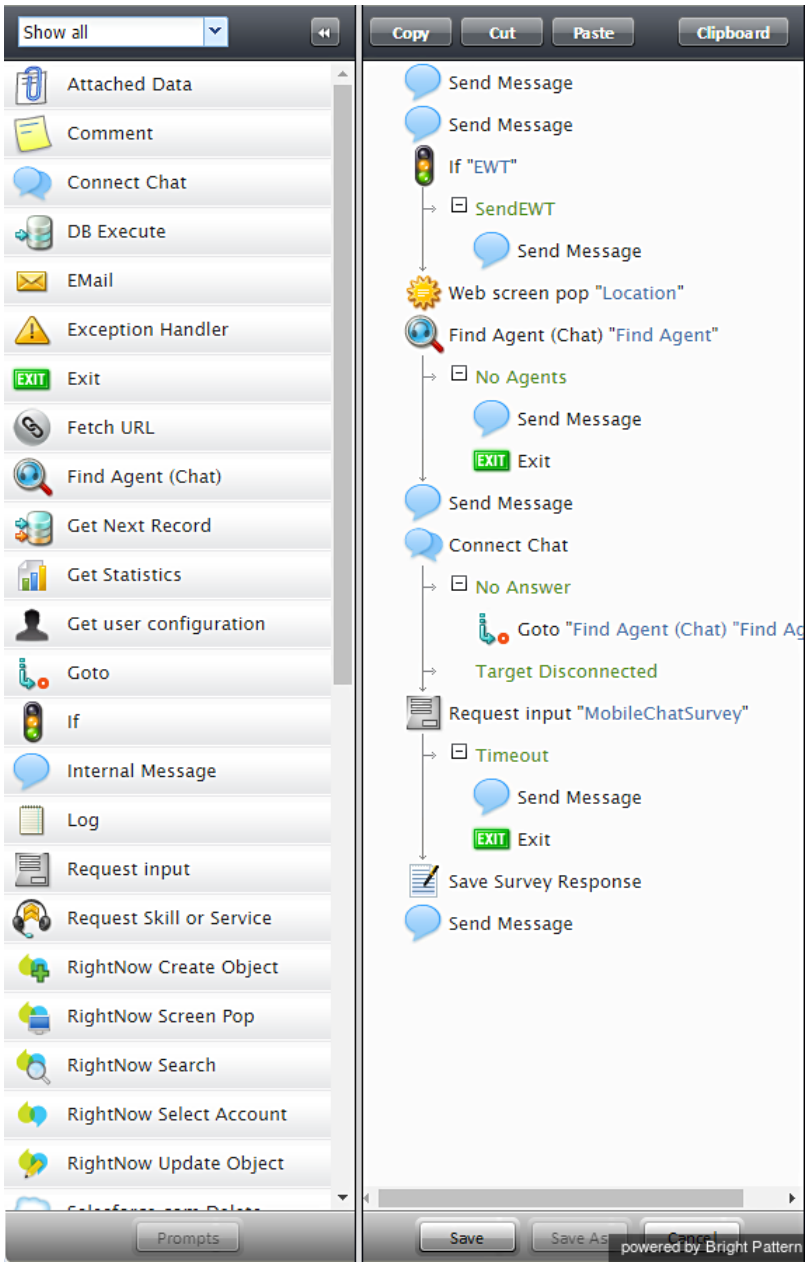
The Mobile Chat scenario can be adjusted to be used for either web or mobile chats. It starts when a customer requests a chat conversation with a contact center. It requests customer data via a web form, and it connects a qualified agent. At the end of the chat session, if offers a survey form to the customer and sends the transcript to the customer.

To use a template, click the **Add from template** icon at the bottom of the screen. In the pop-up window that appears, select the desired template to use. Click **OK**. In this example, the selected template is "Mobile Chat."



Clicking **OK** will launch the Scenario Builder application in a separate browser window or tab (depending on your settings).

Scenario Builder provides a powerful way to customize the sequence of actions in a scenario. This is where you view the template and customize its building blocks (i.e., prompts) to suit your workflow. The Scenario Builder displays all available building blocks (e.g., *Find Agent*, *Send Message*, *Connect Chat*, etc.) in a list on the left-hand panel of the screen. These represent the actions that could occur during an interaction with a customer, and they are dragged and dropped from the *Prompts* list on the left onto any area on the scenario panel to the right. To remove a block, simply drag it to the left, back onto the **Prompts** list.



Refer to the [Scenario Builder Overview Reference Guide]() for detailed descriptions of scenario blocks and how to use them.