5.3 Services & Campaigns Overview

Bright Pattern Documentation

Generated: 12/05/2021 5:36 pm

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Properties Tab

General service settings are configured in the *Properties* tab. The settings are listed in alphabetical order and are described as follows.
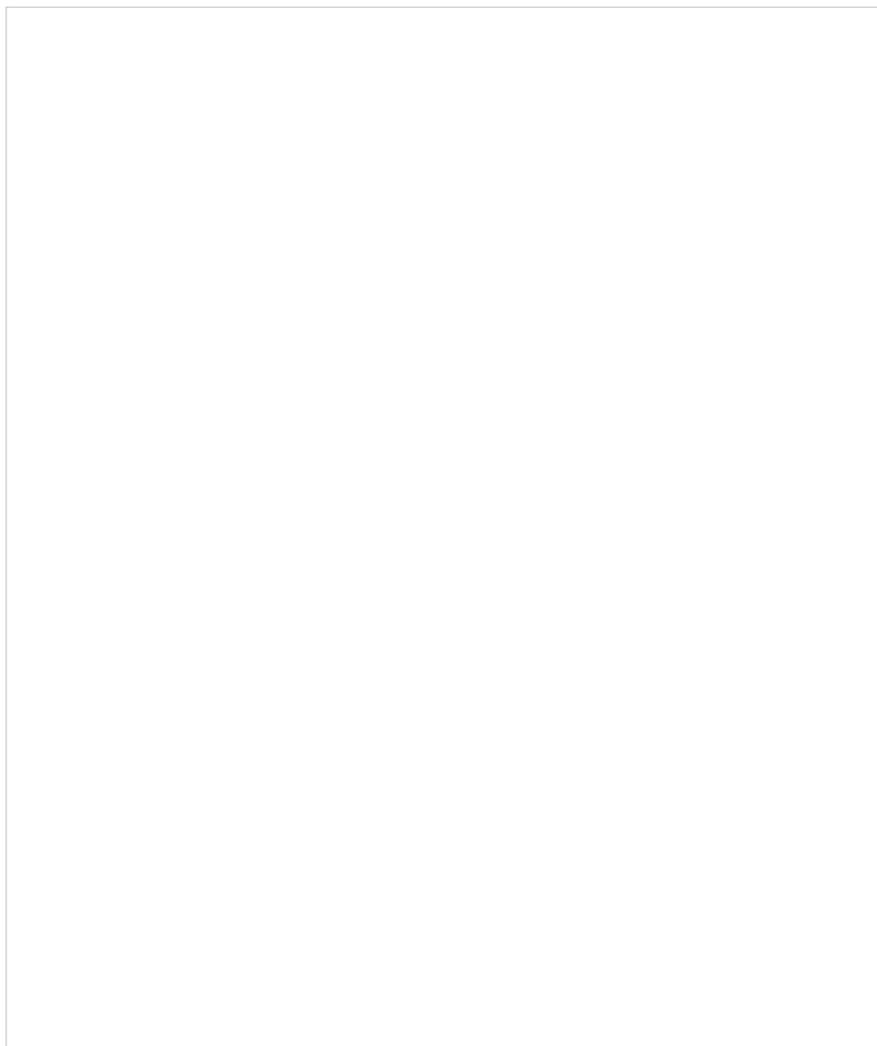
Services & Campaigns > Properties tab

Common Properties

The following properties are available for all service types except where noted.

Name

Name is the service name. This field is mandatory and must be unique within the contact center.

Because service names are used as names for corresponding default service skills, they should not coincide with names of any [auxiliary skills](#).

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.

Type

Type is the type of service or campaign.

- **Inbound Voice** is for inbound voice services.
- **Outbound Voice** is for pure outbound campaigns.
- **Blended Voice** is for when you expect to receive inbound calls that are logically part of your outbound campaign (i.e., when customers who missed your campaign call attempts call back using one of the campaign Caller IDs) and want those inbound calls to be handled by the same agents and in the same way.
- **Chat** is for chat services.
- **Email** is for email services.

If you expect to receive inbound calls that are logically part of your outbound campaign but want these calls to be handled by different agents, you will have to set up two services: an *Outbound Voice* service for the primary outbound campaign and a *Blended Voice* service for the inbound calls. Make sure the following conditions are met:

- Both services have the same [general outbound settings](#).
- Both services are associated with the same internal [DNC lists](#).
- The inbound portion of the blended service has [disposition](#) *Add to DNC*.
- The outbound portion of the blended service is permanently [enabled](#).
- The outbound portion of the blended service does not have any [calling hours](#) configured.

Note the following:

- Service type *Marketing* is reserved for future use.
- Chat and email services cannot change their types after it was specified at the time of service creation.
- Outbound SMS functions are supported for voice services.
- Inbound SMS functions are supported for chat services.
- Definition of many service properties will depend on the selected service type.
- Some types of services may have to be enabled by the service provider in order to become available to you.

Client Partition

Reserved for future use.

Hours of operation

Hours of operation (HOP) are the service hours. Choose **select** to use one of the [pre-configured schedules](#), and select a schedule from the drop-down list. Note that you can edit the selected schedule by clicking **customize**.

Choose **specify** to define a schedule specifically for this service. See section [Hours of Operation](#) for information about creating a schedule. Once you have finished defining this new schedule, you can make it available for use in other services by clicking **save this HOP as shared**.

HOP can be defined for the scenario entry through which interactions access the service. To understand the relationship between these settings, see the description of property *Hours of operation* of the [dial-in scenario entry](#).

Note also that for email services HOP is used for exclusion of service closure hours.

Note also that this HOP setting only specifies when the service is open/closed. In order to complete the HOP configuration, you need to define the following additional elements in the interaction processing scenario associated with this service:

- Checking whether interactions arrive within or outside the HOP. Use the If scenario block for this purpose with the following condition: *"The current date and time" "is not" "scenario default hours of operation".*
- Specifying the action to be applied to interactions if the above condition is met (e.g., play an announcement and exit or offer voicemail).

Override schedule on selected days

You can override the above permanent service schedule temporarily by selecting the *Override schedule on selected days* checkbox and defining a temporary schedule for a specified period of time.

Use dispositions

Indicates whether dispositions can be used for this service or campaign. For outbound and blended voice services, the use of dispositions is mandatory.

If the checkbox is selected, you will be able to define service-specific dispositions in the Dispositions tab and the Agent Desktop application will display the disposition selection menu for the interactions associated with this service. Otherwise, the disposition-related elements will be hidden for this service.

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.

Require dispositions

If the use of dispositions is enabled by the previous setting, you can additionally indicate whether disposition selection is mandatory. For outbound and blended voice services, the use of dispositions is mandatory.

If the *Require dispositions* checkbox is selected, Agent Desktop will force agents to select a disposition for the current interaction before exiting after-call work (ACW). Otherwise, agents will be able to finish interaction handling without selecting any disposition. Note that if ACW timeout is defined, the system will automatically set a blank disposition (i.e., no disposition) after the timeout runs out, even when *Require dispositions* is set.

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.

Enter After Call Work

Enter After Call Work specifies whether agents should enter the After Call Work state after finishing interactions associated with this service. To apply the setting defined at the contact center level, select **system-wide setting**.

Note that after-call work (ACW) is mandatory for services with mandatory disposition selection (see the previous setting). For the teams providing services with mandatory disposition selection, it is also recommended not to enforce automatic exit from the *After Call Work* state or set the timeout for such an exit generously.

Exit After Call Work

If After Call Work is configured for the service, *Exit After Call Work* allows you to set the maximum time teams assigned to this service may be in the After-call Work state.

A drop-down menu displays three options:

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

Note: If this setting is configured, it will override the timeouts configured at the system-wide level and the team level.

Natural Language Understanding

Integration accounts of the Natural Language Understanding (NLU) type that are configured for your system appear in the *Natural Language Understanding* drop-down list. To enable NLU sentiment analysis to be used during chat and voice interactions, select the desired integration account from the list.

Clicking **add/edit** will redirect you to *Call Center Configuration > Integration Accounts*, where you will configure or edit such an integration account.

Evaluation Forms

Evaluation Forms displays any evaluation forms that are configured for this service. To add an evaluation form to a service, click **add**, select the form from the drop-down menu, then select **OK**. Note that it is possible to associate a service with an evaluation form in section Quality Management > Evaluation Forms > Properties tab.

Service-Specific Properties

The following is a list of service properties available per service type.

Voice Properties (Inbound, Outbound, and Blended)

The following properties are available for all voice services except where noted.

Enable voice signature flag

If the *Enable voice signature flag* checkbox is selected, agents will be able to indicate whether a voice signature has been collected during a particular call associated with this service. The voice signature flag will be stored as part of the call record, and it can be used to facilitate the export of and subsequent search for the corresponding recordings. For more information, see sections Interaction Records Search and Recordings Details Format of the *Reporting Reference Guide*, .

The voice signature flag can be displayed for agents via the activity form associated with the given service. For more information, see the *Form Builder Reference Guide*, section Voice Signature System. If the form is not used, the flag will be displayed in the *Contact Info Panel* of Agent Desktop. For more information, see section How to Collect a Voice Signature of the *Agent Guide*.

Voice signature collection makes sense only if calls are recorded. Therefore, when you select this checkbox, the *Recorded calls* parameter of this service (see below) will be automatically set to 100% and become read-only.

To facilitate and ensure compliance of the voice signature collection process, one of the following additional capabilities shall be considered:

- Agents can use prerecorded voice prompts defined as part of the service and made available to them during the corresponding calls. For more information about the prerecorded service prompts, see section Canned

Tab.

- Agents can connect an interactive voice response (IVR) application that will play the necessary prompts, pausing after each such prompt, giving the customer a chance to respond. Bright Pattern Contact Center provides a scenario template called *Voice Signature*, which can be used as an example of such an application. For more information about creating scenarios from templates, see section Scenarios Overview of this guide.

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.

Perform list lookups on incoming calls

For blended voice campaigns, selecting this checkbox enables the system to identify incoming callers by looking up list data.

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.

Record calls/ Do not record calls

The *Record calls* checkbox allow you to record a specific service's calls. Note: If call recording is enabled as a global setting, this checkbox option will change to **Do not record calls** and you can mark this service or campaign to not be recorded

Record IVR call segment

Record IVR call segment indicates whether recordings of calls associated with this service will include recording for the IVR phase of the call. Note that the use of this option should normally be avoided for IVR applications that may process sensitive authentication data such as payment card PIN codes.

Please note: The incorporation of the $(banVoiceRecording) or $(banMonitoring) variables in a voice scenario with an IVR menu will override any recording or monitoring settings you have configured, if selected by a customer. For more information, see Variables in the *Scenario Builder Reference Guide*.

Transcribe calls

Transcriptions may be saved for voice calls if a speech-to-text integration account (e.g., IBM Watson) is enabled for your contact center and call recording is enabled for a service. To enable transcripts for a service, select the *transcribe calls* checkbox.

Enable Virtual Queue functionality

Enable Virtual Queue functionality indicates whether the *Virtual Queue* option is enabled for this service. *Virtual Queue*, also sometimes referred to as *Callback Option*, is an enhancement of the regular automatic call distribution method used in inbound call center services. During periods of significant wait times, this option allows customers to hang up the call while keeping their position in the service queue and to receive a callback when it is their turn to be connected to an agent.

Note that in order to function properly, the *Virtual Queue* option must be additionally configured in the scenario associated with this service. For detailed instructions about virtual queue configuration, see the *Virtual Queue Tutorial*.

This setting is available for inbound and blended voice services only.

Notify agents in ACW about calls in queue

Agents may be notified visually and audibly about new service calls waiting in queue while they are in the<u>After Call Work state</u>. This may be used to prompt the agents to finish their ACW faster. This option is essential only for inbound and blended services and only if the ACW state is used for handling of interactions associated with this service (see *Enter After Call Work* above). If selected, notifications will be sent to all agents who have the default service skill with any level other than "0" and who are currently in the ACW state.

Notify after calls are waiting for

This setting is essential only if the *Notify agents in ACW about calls in queue* option is selected. This setting specifies how long a new service call will wait in queue before notifying the agents. If not specified, the agents will be notified as soon as a new call enters the service queue.

Outbound chat service

For voice services, the *outbound chat service* drop-down list shows all services of the "chat" type. Selecting an outbound chat service enables agents to send an SMS while on a voice call, creating a chat interaction with the SMS ANI from the selected chat service.

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.

Chat Properties

The following properties are available for chat services.

Bot / Chat Suggestions engine

Integration accounts of the IBM Watson type that are configured for your system appear in the *Bot / Chat Suggestions engine* drop-down list. To enable a bot to make suggestions to users during chat interactions, select the desired integration account from the list.

Clicking **add/edit** will redirect you to *Call Center Configuration > Integration Accounts*, where you will configure or edit such an <u>integration account</u>.

Outbound chat accounts

Select the account to use for outbound chats for this service or campaign. *Outbound chat accounts* include chat media (e.g., web chat), SMS numbers, and integration accounts (e.g., messenger integrations). Note that this setting must be configured in order to use the <u>SMS/MMS API</u>.

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

Email Properties

The following properties are available for email services.

Outbound email account

Outbound email account is an email-service-specific property that will be used for sending new outbound emails associated with this service. This parameter must be specified if this service will be used to send [outbound emails unrelated to existing cases](#).

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.

Short name

An optional field, *short name* is the short service name available for email services only and has a 12-character limit. If specified, this name will be displayed for emails associated with the given service in [personal](#) and [team](#) email queue views of the Agent Desktop. (Otherwise, nothing will be displayed due to limited space.)

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.

Directory folder

For email services, this is the folder of the [Agent Desktop directory](#) where this service will appear. This directory will be shown to the agent when the agent selects an email transfer function. You can select an existing folder or create a new one.

Marketing Properties

These properties are reserved for future use.

Assignments Tab

Associations between the service and your contact center personnel are configured in the*Assignments* tab. Settings for these associations are described as follows.

Assignments tab

Teams

Teams is a list of the agents [teams](#) that may handle interactions associated with this service. To assign a team, click **add** and select it from the drop-down menu.

In Bright Pattern Contact Center, every service is represented by its own unique skill, called *service skill*, which is created automatically when the service is defined. When you assign a team to a service, all agents of this team can have this skill automatically assigned to them. You will be prompted to confirm such automatic assignment and specify the desired level. Skill levels of individual agents within the team can be [adjusted manually](#) later.

When you assign a service to a team, supervisors of that team will be able to [monitor this service](#) in real time via their desktop applications.

To remove previously assigned teams, hover over their names. When you remove a team from a service, the default service skill will be removed from all members of this team.

For outbound campaigns, teams can also be assigned and removed via the Agent Desktop application by a user designated as an operator for this campaign.

Note that when teams are assigned to multiple enabled campaigns, the cumulative load of such campaigns must be distributed evenly among those teams. Thus, if a team you are assigning to campaign A is currently already assigned to campaign B, you should check if campaign B has any other teams assigned to it, and if that is the case, assign those teams to campaign A as well. The same verification must be performed when removing teams from campaigns. The following diagrams show examples of valid and invalid team assignments to campaigns.

If the above rule of team assignment to campaign is not observed, campaign configuration will be deemed invalid and the system will provide the following message on the [Outbound > Diagnostics](#) page for that campaign: *Inconsistent assignment of teams to enabled campaigns*.

Examples of valid assignments of teams to campaigns are shown.

CCA-correct-team-campagin-assignment.PNG
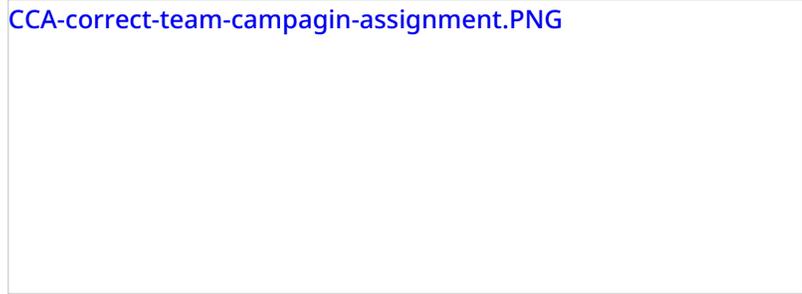
Examples of invalid assignments of teams to campaigns are shown.

CCA-incorrect-team-campagin-assignment.PNG

Administrators

Administrators lists the users who can change the service configuration. To add a user, click**add**, and select the user from the drop-down menu. Only the users who have the privilege *Manage Assigned Services and Campaigns* will be available for selection. (For more information, see sections Users and Roles.) If an assigned service administrator loses that privilege, that administrator's name will be shown in red color in this list.

Operators

Operators lists the users who can operate the given campaign in real time (e.g., start and stop the campaign, add and remove teams). Listing operators is essential for services of outbound and blended-voice type only. To add a user, click **add**, and select the user from the drop-down menu. Only the users who have the privilege*Control Campaign Operations* will be available for selection. (For more information, see sections Users and Roles.) If an assigned service operator loses that privilege, the service operator's name will be shown in red color in this list.

Reviewers

Reviewers lists the users who can have access to functions listed in the[BPO Client group of privileges](BPO Client group of privileges). To add a user, click **add**, and select the user from the drop-down menu. Only the users who have a role with any privileges in the *BPO Client* group will be available for selection. (For more information, see sections Users and Roles.) If an assigned service reviewer loses that privilege, the service reviewer's name will be shown in red color in this list.

Lists Tab

Associations between an outbound campaign and its calling lists are configured in the *Lists* tab. The upper part of this tab displays the [calling lists](#) associated with the selected campaign. To associate a new list with the given campaign, click the button with the "+" sign in the right pane and select the list from the dialog box that appears. The lower part of this tab contains the settings that define how the list will be used within this campaign.

By default, lists assigned to a campaign will appear in the campaign with the same priority and without any filters applied (i.e., if you decided to run a campaign after such initial assignment, all records from assigned lists would be dialed in a round-robin fashion in the order in which they appear in the originally imported list).

Bright Pattern Contact Center allows you to configure list order, apply filters, and define sorting rules. These settings are configured in the *List* tab of the *Services and Campaigns* menu option. Assigned lists appear in the upper portion of this screen. Properties that define the use of the currently selected list within the given campaign appear in the lower screen portion and are described as follows.

Lists tab

Properties tab

List

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

Enabled

Enabled indicates whether the records from this list can be used currently within this campaign. Select the checkbox to use the records from this list.

Lists can also be [enabled and disabled via the Agent Desktop application](#) by a user designated as an [operator](#) for this campaign.

Note also that a quota-based campaign can have only one list enabled in it at a time.

Order

Order defines the order (from low to high) in which lists will be used within the service. If you want records from different lists to be dialed in a round-robin fashion, assign the same priority to all such lists. See property *Dialing ratio* below for more information.

Dialing ratio

For lists with the same order, *dialing ratio* defines the ratio at which records from these lists will be used. For example, if you have two lists with order 1, the first list has dialing ratio set to 2 and the second list has dialing ratio set to 3, two records from the first list will be used, then three records from the second list, then again two records from the first list, and so on.

Instance name

The same list can be assigned to a campaign multiple times with different filters (see the *Filters* tab below). The *Instance name* property allows you to assign a different name for each instance of the same list within the same campaign. Note that the system does not verify uniqueness of such names.

Filters tab

Filter

Filter specifies which records from this list will be used in the given campaign. Click **add filter field** to define a new filter and select the entity that will be used as a filter from the **Filter records by** drop-down menu. You can define multiple filters for the same list instance; in this case, the filters will be applied using AND logic (i.e., a record will be dialed only if the conditions set in all filters are met).

Note the following:

- Applying a filter to list data requires internal reprocessing of the entire list. Thus, if a filter is applied to a list within a running campaign, the use of this list within the given campaign will be suspended until reprocessing is complete. The suspension time will depend on the list size and, for long lists, may amount to tens of minutes. Other lists associated with the same campaign will not be affected.
- Filters cannot be applied to lists with configured quotas (see below). If any such filters have been applied prior to setting a list quota, they will be automatically removed when the quota is configured.

list field values

The *list field values* property allows you to select records with specific values of certain fields.

- From the **Field** drop-down menu, select the desired list field.
- Select **specific values** if the field values in this list must (or must not) match one or more specific values. Specify the values in the field below. Note that each value must be specified on a new line. Indicate whether the records with the matching field values must or must not be dialed.
- Select **value range** if the field value must (or must not) fit within a specified range. This option is supported for numerical values only. Specify the numerical range in the fields below. Indicate whether the records with the field values within the range must or must not be dialed.

dispositions from campaign

Dispositions from campaign allows you to select records that were used in a previous campaign and whose processing ended with a specific [disposition](). For example, if you previously ran a sales campaign and now would like to run a customer satisfaction survey campaign for the products sold during that campaign, you may use this filter to reach only the customers who actually purchased the product (as may be indicated by dispositions in the results of the original campaign).

- From the **Campaign** drop-down menu, select the desired previous campaign. A campaign will be available for selection here if it meets all the following criteria: (1) it has used the same list at some point, (2) its results are still stored in the system, and (3) it does not have a configured quota (see below).
- From the **Dispositions** drop-down menu, select the dispositions indicating that the corresponding records must (or must not) be dialed during the given campaign.
- Indicate whether the records with the selected disposition must or must not be dialed.

Note: Subsequent changes made to the association of the given list with the campaign you select above will potentially affect the filter you create here and may require internal reprocessing of the list to which this filter is applied. During such reprocessing, the use of this list within a running campaign will be suspended until reprocessing is complete. The suspension time will depend on the list size and, for long lists, may amount to tens of minutes. Other lists associated with the same campaign will not be affected.

only never attempted records

This property allows you to select records whose dialing was never attempted during a previous campaign to which this list was assigned. For example, the campaign was terminated before all records on the list had been attempted.

From the **Campaign** drop-down menu, select the desired previous campaign. A campaign will be available for selection here if it meets all the following criteria: (1) it has used the same list at some point, (2) its results are still stored in the system, and (3) it does not have a configured quota (see below).

all unfinished records

The *all unfinished records* property allows you to select all records whose processing was not finished during a previous campaign. This includes the never attempted records as well as the records that were attempted without a final result. For example, a dialing attempt was rescheduled due to no-answer event, but the campaign was terminated before the rescheduled time.

From the *Campaign* drop-down menu, select the desired previous campaign. A campaign will be available for selection here if it meets all the following criteria: (1) it has used the same list at some point, (2) its results are still stored in the system, and (3) it does not have a configured quota (see below).

Quota tab

General information

Outbound quotas are used in campaigns where it is sufficient to process successfully a subset of records from a calling list in order to fulfill the purpose of the campaign. Typical examples of such campaigns are polls and surveys. In a quota-based campaign, records are selected for dialing from the associated calling list based on the conditions set in the quota configuration. The dialing stops once the specified number of such records have been completed with desired [dispositions](). For records whose processing was stopped or never started because a campaign quota related to this record was reached, [campaign results]() will have the *Out of Quota* field set to "1".

Note the following:

- A quota-based campaign can only have one list enabled within it at a time. If you configure any type of quota for a certain list within a campaign, enabling this list will automatically disable all other lists within the same campaign.
- The list used in a quota-based campaign cannot have any filters applied to it within the given campaign. If you have configured any such filters (see above), they will be automatically removed as soon as you configure a quota for the same list.
- A quota cannot be configured for a given campaign if any of its results are used as filters in another campaign. See description of filters *dispositions from campaign*, *only never attempted records*, and *all unfinished records* above.

no quota

No quota indicates that no quota is configured for this list within the given campaign.

list-wide

Use this type of quota to dial a specified number of records from the entire list without applying any specific selection criteria. Enter the desired number of records in the **Quota** field. Dialing will stop once this number of records have been completed with any [disposition of *success* type]().

per field value

The *per field value* type of quota is used for

- Setting separate limits for specific [dispositions of *success* type]() defined within the given campaign
- Setting separate limits based on the specified value(s) of a single list field (e.g., setting a quota per state/province or per age group)

To set a disposition-based quota, select **Campaign Disposition** from the drop-down menu and click the **Set quota** link. The dialog window will list all dispositions of *success* type defined within the given campaign. You can set a different number of records for each specific disposition or enter the same number of records for all dispositions via the **All groups** field. Dialing will stop once the specified number of records have been completed with each disposition for which a quota is set.

To set a field-based quota, select the desired list field from the drop-down menu.

- For text-based fields (e.g., *State/Province*), click the **Set quota** link. The dialog window will list all distinct values in that field that exist in the given list. You can set a different number of records for each specific value or enter the same number of records for all values via **All groups**. The dialer will select records whose values in the given field match values specified in the quota, and will stop processing records with a specific value once the number of records specified for that field value have been completed with any [disposition of *success* type]().
- For numeric fields (e.g., *Age*), typically you would want to set quota by value ranges (e.g., in the case of *Age* field, such ranges would normally represent the age groups for which quotas should be set). Note that such numeric fields must be defined as fields of *Integer* type at the time of [list import]().
  - To specify ranges, select **value groups** and click the **groups** link. For each range, define its start and stop

value and a name that will be shown in quota reports and campaign results. Note that overlapping ranges are not allowed. Click the refresh icon next to to see the total number of records in the given list fitting within each range.

- Once you have defined all your ranges, click the *Set quota* link. The dialog window will list all value ranges that you have defined for the given field. You can set a different number of records for each specific value range or enter the same number of records for all ranges via **All groups**. The dialer will select records whose values in the given field fit in one of the ranges specified in the quota, and it will stop processing records with all such values once the number of records specified for that value range have been completed with any [disposition of *success* type](#).

For field-based quotas, note the following:

- Your service provider may impose restrictions on the maximum number of quota values (or value ranges) that can be configured within a campaign.
- List records that do not match any quota groups defined within a campaign will not be processed within that campaign at all. [Campaign results](#) for such records will have the *Out of Quota* field set to "1" and *Quota Group* field set to "<no match>".
- Adding or removing quota groups in a running campaign will require internal reprocessing of the calling list. During such reprocessing, the campaign will be suspended until reprocessing is complete. The suspension time will depend on the list size and, for long lists, may amount to tens of minutes.

per value pair from 2 fields

This type of quota allows you to set a number of records to be processed per a combination of values from any two fields (e.g., setting a quota per age group in each state). To set quotas per value pair, specify both fields as explained in *per field value* above and click the **Set quota** link. The dialog window will list all possible combinations of values from those fields that exist in the given list. You can set a different number of records for each specific combination or enter the same number of records for all combinations via **All groups**. The dialer will select records with matching value pairs, and it will stop processing records with a specific value pair once the number of records specified for that combination have been completed with any [disposition of *success* type](#).

See the additional notes for field-based quotas above.

Sorting tab

Sorting order

Sorting order allows you to choose the order in which the records of this list will be selected for dialing.

- **Natural** is selected if the records are to be dialed in the same order they appear in the list.
- **Random** is selected if the records are to be attempted randomly.
- **Custom** is selected if the records are to be sorted by the values of a specific list filed. Click **add** to select the field to be used for sorting and specify the desired sorting direction (**ascending** or **descending**). Note that you can sort by multiple fields.

Note the following:

- Changing the sorting order requires internal reprocessing of the entire list. Thus, if you change the sorting order for a list within a running campaign, use of this list within the given campaign will be suspended until reprocessing is complete. The suspension time will depend on the list size and, for long lists, may amount to tens of minutes. Other lists associated with the same campaign will not be affected.
- Record [priority](#) takes precedence over the sorting order.
- Previously dialed and [rescheduled](#) records that are due for dialing take precedence over both record [priority](#) and the sorting order.

Dispositions Tab

Dispositions are used to specify the result of an interaction attempt. For example, a disposition may indicate that the requested service was provided, or it might suggest a specific reason why it was not provided. Dispositions are stored in the [interaction records](#) and [campaign results](#). They can be used in custom queries and reports for evaluation of service efficiency.

Note: The Dispositions tab is displayed only if the **Use dispositions** option is selected on the [Properties tab](#).

In outbound campaigns, dispositions are also used to determine subsequent processing of calling records depending on the outcome of each call attempt. See section [Outbound - Dial Rules](#) for more information. In outbound campaigns, some of the dispositions can be applied to entire calling records and some others to individual call attempts.

For outbound campaigns of [preview type](#), dispositions are also usually defined for preview records. In such campaigns, agents receive calling records from the system and preview them before making the corresponding outbound calls. During the preview, they may decide to discard some records without dialing. Dispositions, in this case, can indicate the reason (e.g., incomplete data).

For [blended services](#), inbound dispositions are processed within the context of the campaign that is part of the same service. For example, if a customer misses your campaign call and then calls back using the campaign's caller ID and buys the product you have been offering within the campaign, the disposition of that inbound call should normally prevent subsequent attempts to call this customer within the same campaign. Therefore, for blended services it is important that the

- Inbound and outbound dispositions correlate (i.e., the former normally should be a subset of the latter)
- Outbound portion of your blended campaign is kept [enabled](#) at all times--even during the periods without any outbound activity

If the reason for a failed interaction attempt can be recognized automatically, the corresponding disposition can be provided by the system. Dispositions that are specified manually will be displayed by the Agent Desktop and can be [selected by the agent](#) at any time during interaction handling, including the after-call work. Dispositions can also be [set by a scenario](#).

How the Dispositions tab looks for an email service

Screen Properties

Show dispositions for

This option is displayed only for outbound and blended voice services. To review and edit dispositions for inbound calls and list records, select **inbound**. To review and edit dispositions for outbound calls and list records, select **outbound**. To review and edit dispositions for preview records, select **preview record**.

List of dispositions

All dispositions configured for this service are displayed in this section; individual dispositions are organized into *folders*. For each interaction type, the system provides a pre-defined set of dispositions. You can edit such predefined dispositions, remove some of them, define new ones, and arrange them in your own folders. The purpose of each predefined disposition is explained in the Description field, which you will see when you click a disposition once.

Even though the system provides a predefined set of dispositions for each new service, you can still control whether these dispositions will or will not be made available to agents for selection when they handle interactions associated with the given service. Furthermore, you can control whether the use of dispositions is mandatory or optional. For more information, see the description of settings *Use dispositions* and *Require dispositions* in the Services and Campaigns - Properties tab.

For the services that comprise different types of interactions (inbound, outbound, preview records), the list will display only the dispositions corresponding to the interaction type selected via the Show dispositions for option.

To modify or delete existing dispositions or folders, hover over their names. Note that most of the dispositions in the *Connection Problem* and *System* folders can be only modified, but not deleted, because they are used in the [built-in dial rules](#) (e.g., automatic rescheduling of unsuccessful campaign 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.

Dispositions properties editor

To create a disposition in an existing folder, click **add** in the desired folder; this will open the dispositions properties editor, allowing you to configure the following. To edit a disposition, hover over the disposition and click the **edit** icon. To delete a disposition, hover over the disposition and click the **delete** icon.
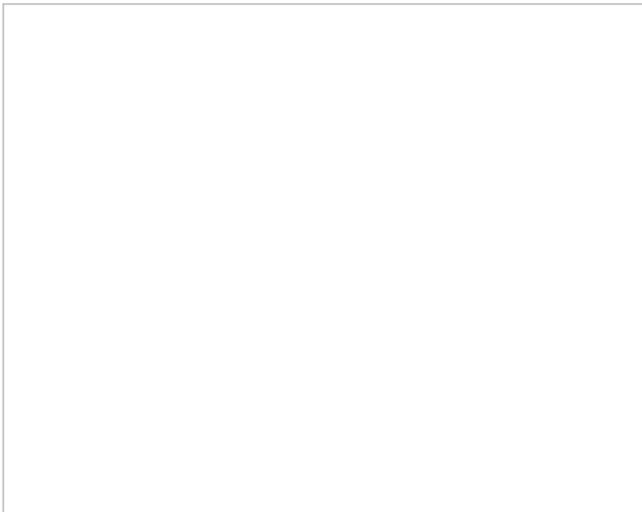
Dispositions properties editor for a voice service

Name

This field is where you specify the disposition's name. Note that this field is mandatory and must be unique within the given interaction type within the service.

Description

This optional field allows you to provide a free-text description of the disposition.

Agent can select

By default, dispositions that you define will be made available to agents for selection during interaction handling. If you do not want the given disposition to be shown to agents (e.g., you intend to use this disposition in scenarios only), unselect the **Agent can select** checkbox. Note that dispositions unavailable to agents appear in the disposition list in italic.

Show in toolbar in team queue

This option, available for email services only, allows you to configure an icon for the disposition, which is displayed as a button in the team queue and personal queue toolbar when an email's corresponding checkbox is selected. This button allows agents to apply a disposition to an email without opening it, thus removing it from the queue. Note that when configuring this option, you must select a corresponding [toolbar icon](). Note that [these buttons]() will not appear unless an an email's corresponding checkbox is selected.

Buttons mapped to either the Final disposition or Spam disposition apply the Resolved status to all selected emails. Buttons mapped to the Nonfinal disposition do not apply a different status to the selected emails (i.e., all selected emails will retain the New status). On this note, it is recommended that buttons are mapped to dispositions of the Final type to prevent important emails from accidentally being removed from the queue.

Toolbar icon

When the [Show in toolbar in team queue]() option is selected, the *toolbar icon* option appears; this setting lets you map an icon to a disposition that will be displayed as a button in Agent Desktop's team queue and personal queue.

To map the icon to the disposition, select the **search** ⬜ icon or click **icon search** to access the drop-down list of toolbar icons.
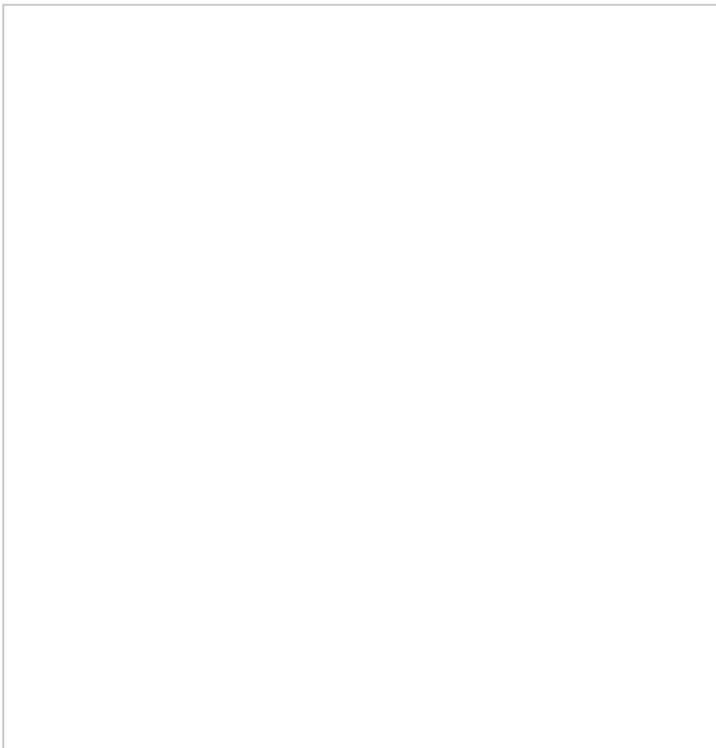
Select an icon to add to your team queue's toolbar

Type

Type is a disposition category that executes specific actions when applied to an interaction; available types vary per service. The following is a list of all disposition types. **Note**: Dispositions considered final (i.e., ones that complete records or cases) are editable by those with the privilege [Can update final dispositions]() only.

Success (completes record or case)

Success is for dispositions indicating successful interaction processing (e.g., the customer has accepted the offer) or closure of a case.

Final (completes record or case)

Final is for dispositions indicating successful interaction processing (e.g., the customer has accepted the offer) or closure of a case; this type is available for email services only.

Failure (completes record)

Failure is for dispositions indicating unsuccessful interaction processing without subsequent attempts (e.g., the customer has rejected the offer); this type is available for voice services only.

Do not Call (completes record)

Do not Call is for dispositions indicating that the customer has requested not to be contacted again for the given reason; this type is available for voice services only.

Continue

Continue is for dispositions indicating unsuccessful interaction processing with possible subsequent attempts (e.g., the customer has asked to be called again at another time) or expected continued processing of a case; by default, any new disposition of this type is associated with action Reschedule (24h); for more information, see section [Outbound - Dial Rules](#).

Nonfinal

For dispositions indicating unsuccessful interaction processing with possible subsequent attempts (e.g., the customer has requested to be contacted at another time) or expected continued processing of a case; this type is available for email services only.

Spam

For dispositions indicating an immediate closure of an email case because the incoming message was spam

For services that comprise different types of interactions (inbound, outbound, preview records), you can also specify if the disposition you define for one interaction type shall be available for interactions of other types within the same service. Select such desired additional interaction types via the *Scope* option.

Code

If, in addition to the disposition name, you would like to use a numeric code (integer), specify it in the**Code** field. Disposition codes are optional, and when defined, will appear in [campaign results](#) along with disposition names. Codes can also be used instead of disposition names when [setting dispositions in scenarios](#).

There are no predefined disposition codes because you can assign any string to be a disposition code. A disposition code can contain up to nine digits; any characters are allowed. Note that the system does not check uniqueness of disposition codes.

Add folder

The *add folder* option allows you to create a new folder for dispositions. To add a new folder, click**add folder**, specify the folder name, then add the desired dispositions.

Import

The *Import* option imports dispositions and allows you to define dispositions externally and import them in the .CSV format. For each disposition, the following fields must be defined in the specified order:

- Name
- Folder name (disposition category)
- Description
- Code
- Agent can select (true, false)
- Type (SUCCESS, FAILURE, CONTINUE, DO_NOT_CALL)
- Is inbound (true, false)
- Is outbound (true, false)
- Is preview (true, false)
- System type (if defined, the disposition will be followed by the same actions that are defined for the corresponding default dispositions in the Connection Problem and System folders)
  - Possible values include the following: empty string, DROPPED, BUSY, NO_ANSWER, FAX_MODEM, ANSWERING_MACHINE, SILENCE, INVALID_NUMBER, OTHER_CONNECTION_ISSUE, ABANDONED, CONGESTION_REMOTE, NO_AGENT, NO_DISPOSITION, SKIPPED, SYSTEM_FAILURE, AGENT_FAILURE, FINALIZED_BY_DIAL_RULE, MAX_ATTEMPTS_REACHED, DISPOSITION_NOT_FOUND, PHONE_NETWORK_UNAVAILABLE, RECORD_EXPIRED, CALL_FAILED, FAST_BUSY, ANNOUNCEMENT, NETWORK_ANNOUNCEMENT
- Service type (since many dispositions are service/media-type-specific this field must be defined to make sure that the dispositions are not imported into a type of service they are not intended for)
  - Possible values include the following: INBOUND, OUTBOUND, BLENDED, CHAT, EMAIL

Each value must be enclosed in the quotation marks. Optional parameters must be set to an empty string when not defined.

An easy way to create an import file is to export an existing list of dispositions (see *Export* below) and modify it as may be necessary.

Export

This option exports dispositions in .CSV format. The exported file can be used as a template when defining dispositions externally and importing them into the system. For specification of the fields, see the description of the *Import* function.

Activity Tab

Association of services with [activity forms](#) is configured in the *Activity* tab. Activity properties are organized into tabs, which are described as follows.

Activity tab

Activity tab

Enable screenpop activity form

If you have an activity form that you wish to appear on each agent's Agent Desktop upon arrival of interactions associated with this service, click the checkbox and select the desired form from the drop-down menu.

The specified activity form will be displayed in the Context Information Area of the Agent Desktop application. This area is not shown when Agent Desktop is run minimized using the Pop-out function. Thus, when using activity form screenpop, consider disabling agents' privilege *Force pop-out phone window*.

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.

Display activity form before/after web screen pop(s)

If, in addition to the activity form page specified above, agents will be getting any other web page(s) specified in the Web screen-pop scenario block, this setting specifies the order in which these pages will appear in the tabs 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.

Display Knowledge Base

When this checkbox is selected, Knowledge Base will be displayed on 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.

Pre-fill form fields from the following lists

For an outbound campaign, it is often desirable to display some of the data from calling list records in the agents' activity forms. To do this, you need to create the mapping between the fields of your form and the corresponding fields of the calling lists associated with the given campaign. Note that if you wish to make such fields searchable, this must be done at the time the calling list is created. Search grid settings are configured in section Forms > Activity.

Click the **Edit** button. In the list view of the dialog window that appears, select a form field that you wish to bind. For each list associated with the given campaign, select the calling record field that maps into the selected form field. Repeat this operation for other form fields that are supposed to display data from the calling records.

Click **Apply** to save changes. Click **Close** to return to the main screen. The mapping you have created will be shown in a table.

Numbers Tab

The *Numbers* tab is used for configuring associations between services and access numbers for various purposes. These associations are further organized into three tabs (*Scenarios*, *Caller ID*, and *Text Out*) and they are defined using the following properties described.

Numbers tab overview

Scenarios tab

List of scenario entries

When you define your services, you can, at the same time, create related scenario entries (i.e., associate your services with scenarios where they will be used and assign those scenarios to access points). Note that scenario entries also can be created via the following application screens: Access Numbers, Scenarios, and Scenario Entries.

Scenario entries associated with the selected service appear in the list of inbound scenario entries regardless of where they were originally created. For each scenario entry, the list will also display the scenario name and the access number.

If you decide to create a scenario entry from within the given service, click the "+" sign below the list of inbound scenario entries and define the scenario entry parameters in the property sheet that appears.

Scenario entry properties

Scenario entry properties are the properties of the scenario entry selected in the list above. 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.

Scenarios tab screen properties

Caller ID tab

Properties of the *Caller ID* tab allow you to configure caller IDs (i.e., the numbers that will be displayed to the parties when they receive calls associated with this service/campaign). Before proceeding with specifying the properties for the Caller ID tab, you should first specify the properties for the *Scenarios tab* (see above) and Dial-in scenario entries. It is particularly important to specify the numbers associated with this service; without those phone numbers, caller IDs cannot be established for this service.

Before configuring your caller IDs, be sure to check all legal requirements and restrictions for what can be sent as a caller ID in the jurisdictions where you operate.

To set up Caller IDs, run through the following steps:

1. Specify the properties for the Scenarios tab (see *Scenarios tab* above).
2. Specify the properties for Dial-in scenario entries.
3. Use the selector to choose the selection method (see *Selection method* below) that will be used to select

specific caller IDs for this service.

4. Specify a default caller ID number, if desired (see *Default* below).
5. Review the caller ID numbers with the associated state information and add more, if desired (see*Caller ID list* below).

Caller ID Screen Properties

Selection method

The *selection method* is important to setting up caller IDs for your service. The method chosen is what will be used for the selection of specific caller IDs in case more than one number is specified in the Caller ID list. Note that some of these methods make sense for outbound campaigns only.
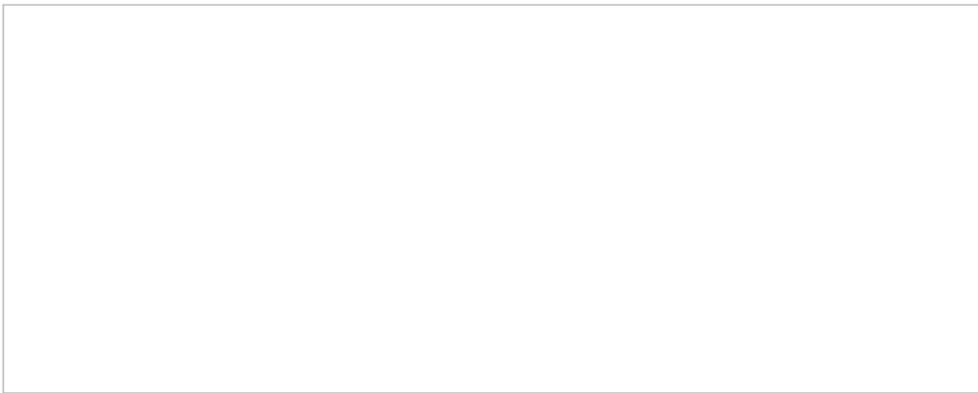
Select the desired Caller ID number to use for the service

A pull-down menu offers the following methods:

- **Default** will display a specified external access number for all calls made for this service/campaign (see property *Default*).

- **Random within list** will display one of the caller ID numbers randomly chosen from the list of numbers defined in the Caller ID list below.

- **Random within state, otherwise default** will display a number randomly chosen from the Caller ID list below whose state/province setting matches the state/province property of the dialed record. If the state/province information is not present in the record, the specified default number will be displayed (see property *Default*).

- **Random within state, otherwise random within list** will display a number randomly chosen from the Caller ID list below whose state/province setting matches the state/province property of the dialed record. If the state/province information is not present in the record, a caller ID number will be randomly chosen from the entire list.

- **From list field of type "Caller ID", otherwise default** will display the caller ID defined in the calling record. If a calling record does not have a number in the "Caller ID" field, the specified default number will be displayed (see property *Default*). Note that your service provider may or may not allow use of arbitrary caller ID numbers for your outgoing calls. If the use of arbitrary caller IDs is not available to you, the number specified in the calling record will be used only as a caller ID if it matches one of the access numbers assigned to your contact center; otherwise, the specified default number will be used (see property *Default*).

- **Closest to the dialed area code's location** will display the number from the Caller ID list below whose area code happens to be the same as, or geographically closest to, the area code of the dialed number. (This may

increase the probability that the called party will answer the call.) This option is currently supported for the USA, Canada, and Australia.

- **Direct Mapping of Internal Numbers** will display the number that has been assigned to the agent (instead of the corporate number) for outbound dialing for services and campaigns. This selection method sets the agent's internal number as the caller ID, enabling customers to call back the agent's desktop directly.

Default

Default, the property shown beneath the selection method property, gives the option to specify the default service/campaign caller ID number. Note that the numbers available for selection must be added first to the *Caller ID list* (see below). This parameter must be specified if the *Campaign caller ID* property is set to either *Default, Random within state, otherwise default,* or *From list field type "Caller ID", otherwise default*

Caller ID list

The *Caller ID list* at the bottom of the screen lists caller ID numbers with the associated state information.
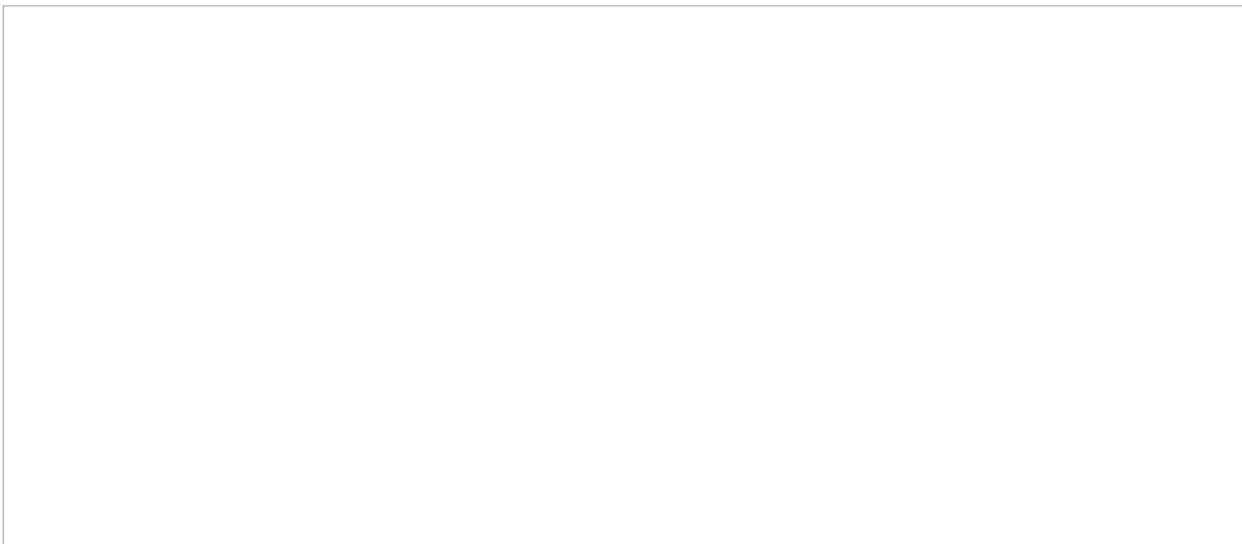
The Caller ID list is shown at the bottom of the screen

Click the "+" sign button to add a number to the list.

Note that a number used as a service/campaign caller ID must be one of the available [access numbers](). For campaigns, there is an additional condition that such an access number must not be restricted for automated outbound dialing. Access numbers of any destination type (extension, scenario, or unassigned) can be used as caller IDs. Note however, that sometimes customers who missed a call may want to call back using the caller ID number; thus, it may be expedient to use an access number associated with scenarios for handling of such callbacks. This is particularly important for blended services where callbacks are expected and should be normally distributed to the same agents who handle the corresponding outbound calls.

For each number, you can optionally define state/province information. See the description of the *Campaign caller ID* property for an explanation of how state/province information is used. Note that the spelling of state/province information must match the spelling used in the calling lists associated with this campaign.

You can define multiple caller ID numbers with the same state/province, and you can add the same caller ID number multiple times with different states/provinces. You can also export caller ID lists for possible use in other campaigns. You can also import caller ID lists defined for other campaigns.

At least one number must be defined for an outbound or blended campaign. For inbound services, definition of caller IDs is optional. If no numbers are defined for an inbound service, the caller ID number from the [dial-out entry](#) associated with the dialed prefix will be used.

Service Level Tab

Service Level specifies the percentage of calls/chats associated with this service that are expected to be answered within a specified threshold.

The actual percentage of the interactions answered within the specified threshold time is [monitored in real time](#), and supervisors can be [alerted](#) in case it drops below the specified target.

The Service Level tab is displayed for inbound voice, blended voice, and chat services only. For email services, the service level is defined differently. Email service level is configured in the Email tab.
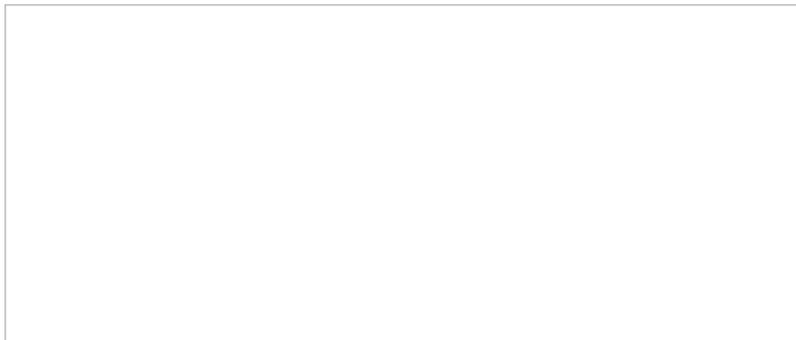
Service Level tab

Properties

The Service Level tab has the following parameters to be set: *answered calls* and *within threshold*.

Answered calls

Answered calls is the percentage of calls or chats expected to be answered within the specified threshold relative to all calls/chats that are answered at any time or abandoned after this threshold. (Calls/chats abandoned within the threshold time are considered short-abandoned.)

Within threshold

Within threshold is the threshold time (in seconds).

Outbound Tab

The Outbound tab of the *Services and Campaigns* section of Contact Center Administrator provides a multiscreen view for the configuration of campaign-specific settings of outbound and blended services.

Outbound tab properties are organized into five screens: General Campaign Settings, Calling Hours, Dial Rules, Do Not Call lists, and Diagnostics. For detailed descriptions, follow these links:

- [Outbound - General](#)
- [Outbound - Calling Hours](#)
- [Outbound - Dial Rules](#)
- [Outbound - DNC](#)
- [Outbound - Diagnostics](#)

For the recommended campaign configuration process, see *Tutorials for Admins*, section [Outbound Campaign Configuration](#).

Notes:

- Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making a change to outbound tab properties, particularly for voice service and email service properties, we recommend that all affected logged-in agents refresh their browser page.
- If a custom scenario is used for an outbound campaign, note that it is not recommended to use the [Request Skill or Service](#) block to change the service to a difference service. The result of this is the list of dispositions presented to and used by agents will not match the list of dispositions for the outbound campaign results.

Outbound campaign settings

Results Tab

The *Results* tab provides access to settings related to the export of campaign results as well as the export of call recordings for voice services and chat transcripts for chat services.

Results tab

Campaign results are stored in the calling list database and can be downloaded manually in .CSV format or exported periodically to designated network locations.

Campaign results are archived into .ZIP files when one of the following events occurs:

- The list is deleted from configuration.
- The list is removed from the campaign.
- The list is updated with new content via periodic import with the update policy set to *replace list data*.

Archived campaign results are listed in the *Archive* tab and are available for manual download only.

Note that campaign results are permanently deleted when the campaign itself is deleted.

Storage of recordings is typically defined by the terms and conditions of your service contract. Expired recordings are deleted automatically.

Before configuring the export of recordings, consider the bandwidth and amount of disk space that may be required to transfer and store all of the exported voice files. As a general guideline, use 5.7 MB per agent per working hour to calculate the necessary disk space. Note that some restrictions may be imposed at the service provider level on the hours during which export may take place (see property *Window*) and bandwidth allocated for the export tasks.

Note that if your audio files and/or chat transcripts are encrypted at the time of recording according to your encryption settings, they will be decrypted for export.

Settings

Results tab configuration settings are organized by export type: Periodic Recording Export Jobs, One-time Campaign Results Download, Periodic Export Jobs, and Periodic Salesforce.com Export Jobs. Settings for each type are described as follows.

Periodic Recording Export Jobs

Periodic Recording Export Jobs allows you to configure multiple export jobs for call recordings of this service or campaign. Each export job can have its own schedule, destination, file name format, and a set of filters.

Click **add** to specify a new periodic export job. The following dialog box will pop up.

Note that if your recordings are encrypted while they are stored in the Bright Pattern platform, they will be un-encrypted for export.

Periodic Export of Recordings dialog window

Name

Name is the name of this export job. This name will appear in the list of periodic tasks. See section*Tasks* for more information.

Enabled

Select the *Enabled* checkbox to activate this export job.

Voice signature only

Select the *Voice signature only* checkbox if the operation shall export only recordings that contain [voice signatures](#).

Dispositions

Using *Dispositions*, export recordings of calls that were dispositioned in a specific way, and select the corresponding [disposition(s)](#). To export recordings for all calls regardless of their dispositions, select**All**.

For outbound services, note that recordings for some of the unsuccessful call attempts may not be available unless [the *Record CPA phase of call attempts* option](#) is selected for the given campaign.

Recording completed after

The *Recording completed after* setting allows you to specify the start time and date from which the recordings will be exported. Upon completion of the initial and each subsequent task export task, this parameter will be updated automatically to show the date and time of the last exported recording. The next [export task](#) will begin with the chronological next recording that satisfies the selection criteria (i.e., service, disposition, etc.).

Daily export time window

Daily export time window is the time window during which export of recordings will take place. This parameter is specified at the service provider level and will appear as read-only.

Use exported files for playback in interaction search

When checked, enables the use of Amazon S3 recordings for playback in interaction records even after your contact center's configured retention interval has passed. If multiple exports are made of the same recordings to different S3 locations and all exports have this option enabled, the recordings will be played back from the location of the last export.

Note: Playback in interaction records will work as long as detailed records in the historical database are preserved and S3 recordings are kept.

This setting only appears when the Amazon AWS protocol is selected as the export method (see section*Protocol* below).

Recordings files folder FTP URL

Recordings files folder FTP URL is where one specifies the FTP site folder where the recordings should be exported.

Recording file name

Recording file name is the specified format of the recording file name and subfolder structure. By default, at the designated network location, exported files are arranged in folders titled *recordings/[date]/[hour]* corresponding to the date and the hours when the calls started. The default recording file name consists of the call start date/time, phone number of the call party opposite to the agent, [username](#) of the last agent to handle this call, and a global unique identifier generated by the system for this recording.

To modify the file name and/or folder structure, click the current format. The current format will appear in an editable field. You can delete any of the current file name components or insert new ones. To add a new component to the current format, set the cursor to the desired place in the file name, click the **Insert placeholder** button, and select the desired component from the drop-down menu. For descriptions of the available file name components, see section [Recordings Details Format](#) of the *Reporting Reference Guide*.

A file name example corresponding to the currently selected format will be displayed under the editable field.

Recording CSV file name

Recording CSV file name is the specified format of the recording details file name.

For each instance of a periodic recordings export, the system also generates a data file. The file is exported to the same network location in the CSV format and contains details of the corresponding calls, which may facilitate searches for specific recordings once they have been exported out of the system. For more information about the **content** of this file, see section Recordings Details Format of the *ServicePattern Reporting Reference Guide.*

The default data file name is *recordings_details* for voice and *transcripts_details* for chat with the date and time of export added to it (e.g., *recordings_details_$(currentDate)_$(currentTime).csv*). **Note**: The following variables may be included in the file name:

- $(currentDate)
- $(currentTime)
- $(periodEndDate)

If you modify the name of the file to include *$(periodEndDate)*, note that it is the timestamp of the last interaction in the exported batch (e.g., *recordings_details_$(periodEndDate)*). If there were no interactions in the given export period, the value of *$(periodEndDate)* will coincide with the end of the export interval itself. If you use this variable in the file name, note that if there are days when your contact center is closed, the names of the data files produced for that day and the following (working) day may have the same date and differ by the time component only.

Protocol

Protocol specifies the export method. In all three methods, if the recordings are stored encrypted, they will be un-encrypted for export.

Note that export to AWS must be explicitly enabled by your service provider and configured via Integration Accounts. For all three methods, the exported recordings will continue to be stored and available for playback via Bright Pattern for the recordings storage time agreed upon with your service provider. After the recordings have been deleted from the local storage:

- Recordings exported via FTP/SFTP will no longer be accessible via Bright Pattern.
- Recordings exported to Amazon AWS will continue to be accessible via Bright Pattern on demand for the detailed records storage time agreed upon with your service provider.

Username

Username is the specified FTP username.

Password

Password is the specified FTP password.

Test connection

The *Test connection* button is used to test the FTP connection with the supplied credentials.

One-time Campaign Results Download

This setting allows you to download campaign results locally in the .CSV format. To download, click the **Download now** button, specify the download settings, and click **Export**. The following dialog box will pop up.

[Export Campaign Results](#)

Lists

Select the [lists](#) whose records the downloaded file should contain.

Dispositions

If you would like to download records that were dispositioned in a specific way, select the corresponding [disposition(s)](#) here. To download results for all records regardless of their dispositions, select **All**.

Format

Format is where you indicate whether the downloaded file shall contain only the last result for each completed record (**simple**), or whether it should include results of all dialing attempts (**detailed**).

For detailed results, specify whether the downloaded list shall contain all call attempts for the records that were completed within the requested time frame or only the call attempts that were actually made within that time frame.

For specification of campaign result formats, see sections [SimpleFormat](#) and [Detailed Format](#) of the *Reporting Reference Guide*.

Between

By default, the downloaded file will contain all records since the last download. Use the *Between* setting to limit the download to contain only information about the records that were closed within a specific time interval.

Timezone

Set the *timezone* for the records to be exported.

Compress file

Selecting the *Compress file* checkbox will download results in a .ZIP file.

Periodic Export Jobs

Periodic Export Jobs allows you to configure multiple jobs for automated export of campaign results via FTP in the .CSV format. Each export job can have its own schedule, destination, and set of filters. Click **add** to specify a new periodic export job. The following dialog box will pop up. Fields shown in red are required fields.

Edit Export Parameters
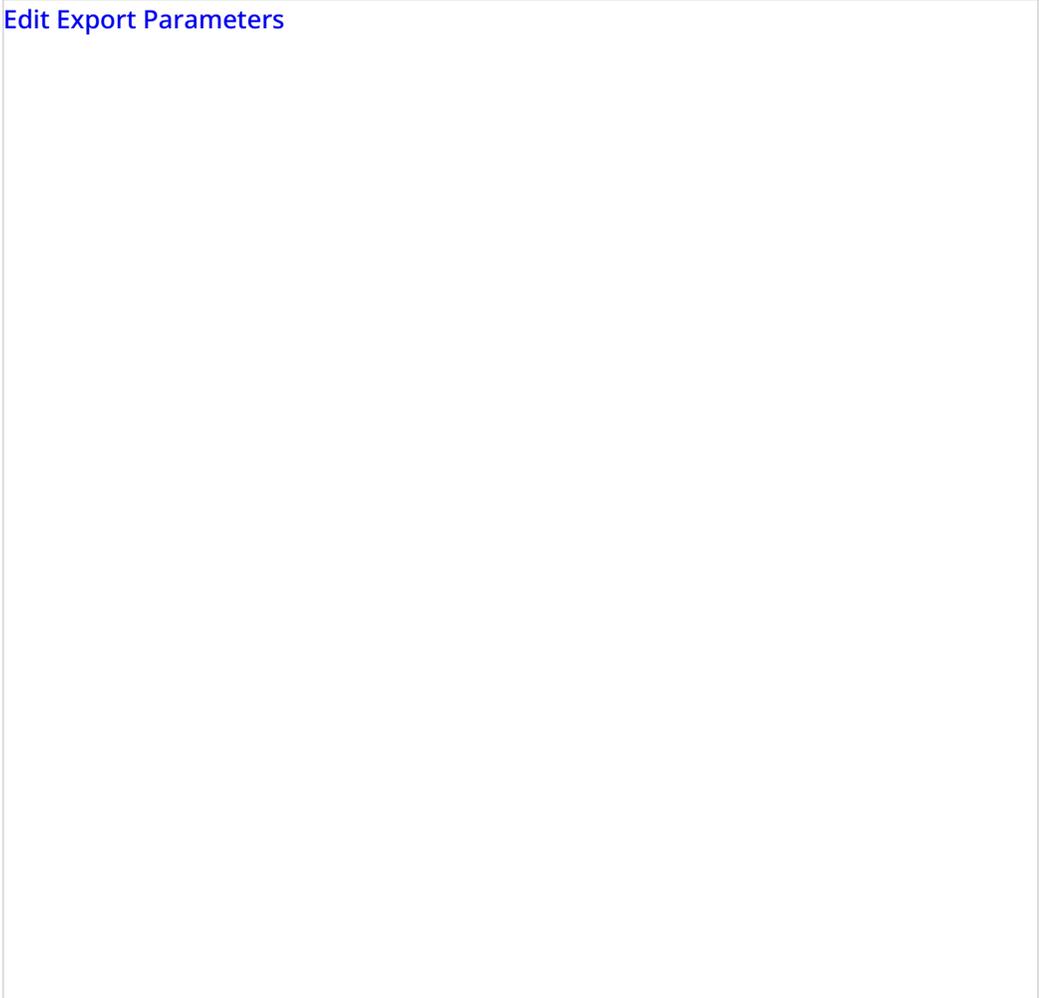
Name

Name is the name of this export job. This name will appear in the list of periodic tasks.

Enabled

Selecting the *Enabled* checkbox will activate this export job.

Lists

Select the *lists* whose records the exported results should contain.

Dispositions

If you would like to export records that were dispositioned in a specific way, select the corresponding[disposition(s)](#) here. To export results for all records regardless of their dispositions, select **All**.

Format

Format is the specified format of the exported file. Indicate whether the exported file should contain only the last result for each completed record (**simple**), or whether it should include the results of all dialing attempts (**detailed**).

For detailed results, specify whether the exported list should contain all call attempts for the records that were completed within the requested time frame or only the call attempts that were actually made within that time frame.

For specification of campaign result formats, see sections [SimpleFormat](#) and [Detailed Format](#) of the *Reporting Reference Guide*.

Start date and time

This is the specified start date and time of the periodic export.

Export interval

Export interval is the specified frequency for the results to be exported. The minimum update period is

- 1 hour for the **simple** and **detailed** (records and all call attempts) export options
- 15 minutes for the **detailed** (only call attempts performed in timeframe) export option

FTP URL with file name

FTP URL with file name is the specified FTP site and the name of the file to which the results should be exported. The date and time of export will be automatically appended to the file name for each export instance.

Protocol

Protocol is the specified transfer protocol (FTP or SFTP).

FTP username

FTP username is the specified FTP username.

FTP password

FTP password is the specified FTP password.

Test connection

The *Test connection* button is used to test the FTP connection with the supplied credentials.

Periodic Salesforce.com Export Jobs

Periodic Salesforce.com Export Jobs allows you to configure multiple export jobs for automated creation of Salesforce.com objects according to the campaign results. For more information, see section [Importing Calling Lists and Exporting Campaign Results](#) of the *Salesforce.com Integration Guide*.

Each export job can have its own schedule, destination, and a set of filters. Click **add** to specify a new periodic export job. The following dialog box will pop up. Fields shown in red are required fields.

Name

Name is the name of this export job. This name will appear in the [list of periodic tasks](#).

Enabled

When selected, the *Enabled* checkbox will activate this export job.

Lists

Select the *lists* whose records the exported results shall contain.

Dispositions

If you would like to export records that were dispositioned in a specific way, select the corresponding[disposition(s)](#) here. To export results for all records regardless of their dispositions, select **All**.

Format

Format is the specified format of the exported file. Indicate whether the exported file shall contain only the last result for each completed record (**simple**), or whether it should include results of all dialing attempts (**detailed**).

For specification of campaign result formats, see sections [SimpleFormat](#) and Documentation:ServicePattern:reporting-reference-guide:DetailedFormat|Detailed Format]] of the *Reporting Reference Guide*.

Start date and time

This is the specified *start date and time* of the periodic export.

Export interval

Export interval is the specified frequency for the results to be exported. The minimum interval is 15 minutes.

Salesforce.com integration account

Salesforce.com integration account is the [integration account](#) that will be used to access the Salesforce.com records to be updated.

Salesforce.com object

This is the *Salesforce.com object* that will be updated using the results of this campaign.

Map fields

Use the *Map fields* button to map Bright Pattern Contact Center campaign result fields to the properties of the specified Salesforce.com object.

For specification of campaign result formats, see sections [SimpleFormat](#) and [Detailed Format](#) of the *Reporting Reference Guide*.

Test by creating object

Click this button to create a test *Salesforce.com object* according to the mapping you specified using the *Map fields* button. Check your Salesforce.com application to make sure the object has been created.

Interactions Erasing

To support compliance with various regulations related to data ownership and privacy, such as GDPR, Bright Pattern allows for the manual erasure of data that is stored in interaction records for voice recordings, voice recording transcripts, chat transcripts, email messages, screen recordings, and other such interaction content.

The ability to remove sensitive data from interaction records is enabled for users with the Security Administration [privilege](#) "Can edit and erase interaction records."

System administrators with the privilege to edit and erase interaction records can erase content for specific services and campaigns by using the *Interactions Erasing* feature in the *Services & Campaigns* Results tab. Note that to erase any content, you must provide a reason.

How to Erase Interaction Content

1. Go to *Services & Campaigns* and select the desired service or campaign from the list.

2. Click the **Results** tab and click **Start erasing**.
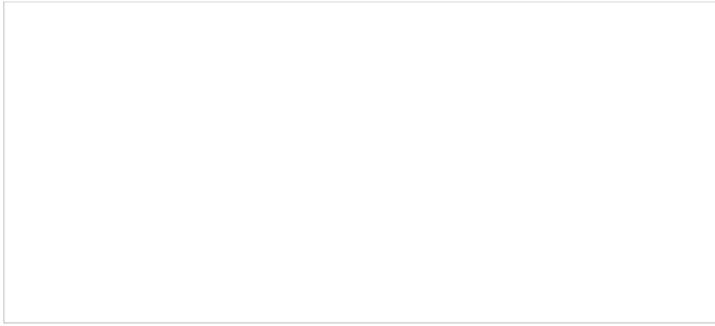
Results > Interactions erasing

3. The *Erase interaction* dialog will appear.
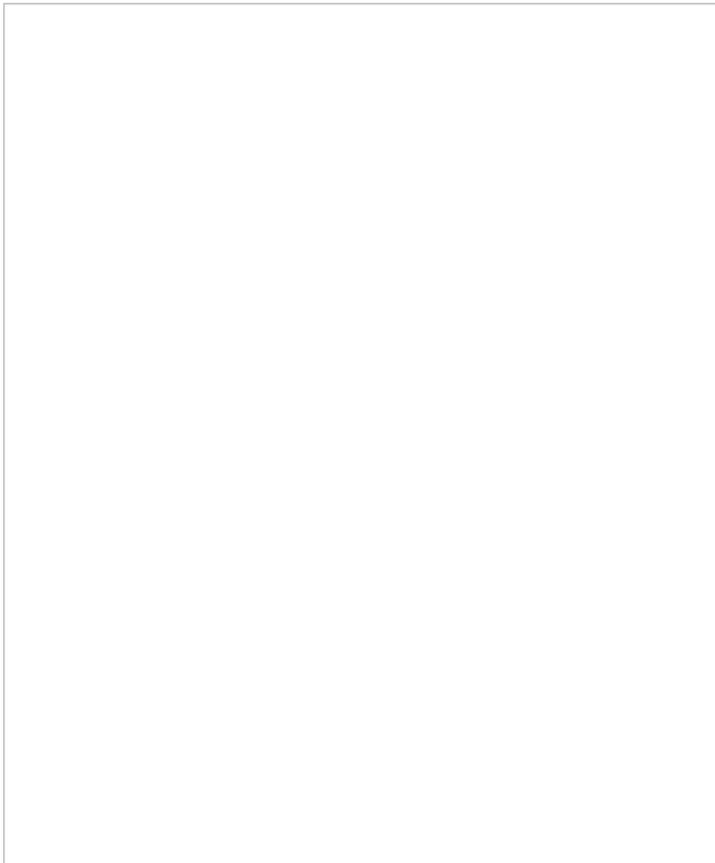
Erase interaction dialog

4. Select the *items to erase*, choosing from the following options: Voice recording, Transcript of voice recording, Chat transcript, Email message, and Screen recording.

5. In the *From date* field, specify the date of the interaction to be erased.

6. In the *Reason* field, document the reason for erasing the content. Note that this field is mandatory.

7. Click **Erase**.

8. A warning dialog will inform you that *The requested operation will irrevocably destroy the [recording/transcript/message body] of selected interaction(s)*. To proceed, click **Erase**.
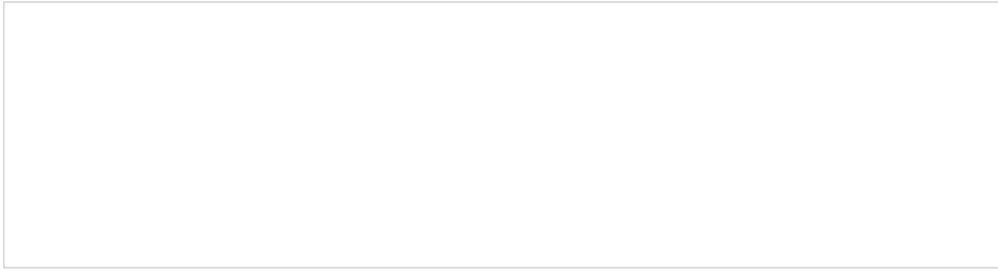
A warning message appears

The erase action will be recorded in your contact center's audit log.

Archive Tab

The *Archive* tab provides a list view of archived campaign results. For events that trigger campaign results archiving, see the description of the [Services and Campaigns - Results tab](#).

Archived campaign results are stored in .ZIP files. To download a selected archive, click **Download**. To delete an archive that you no longer need, click **x**.

Storage of archived campaign results is typically defined by the terms and conditions of your service contract. Expired archives are deleted automatically.

Note that all archived campaign results are also deleted automatically when the campaign itself is deleted.

Archive tab

Canned Tab

Your agents have the capability to play back prerecorded voice messages to their customers. For more information, see section How to Use Pre-recorded Messages of the *Agent Guide*.

You can define prerecorded messages at the service level. Such messages will appear in the message selector of the agents' desktops when they handle calls associated with the given service.

Since many such messages can be shared by multiple services and also used in various interactive voice response (IVR) applications, they are first configured as shared voice segments. For more information, see section Shared Voice Segments of this guide.

To add shared voice segments to or remove them from the given service, click the **add/remove** link, and move the desired segments between the general and assigned lists.

Email Tab

The *Email tab* includes settings specific to email services.

To view and edit these settings, select the **Email** tab of the desired email service.
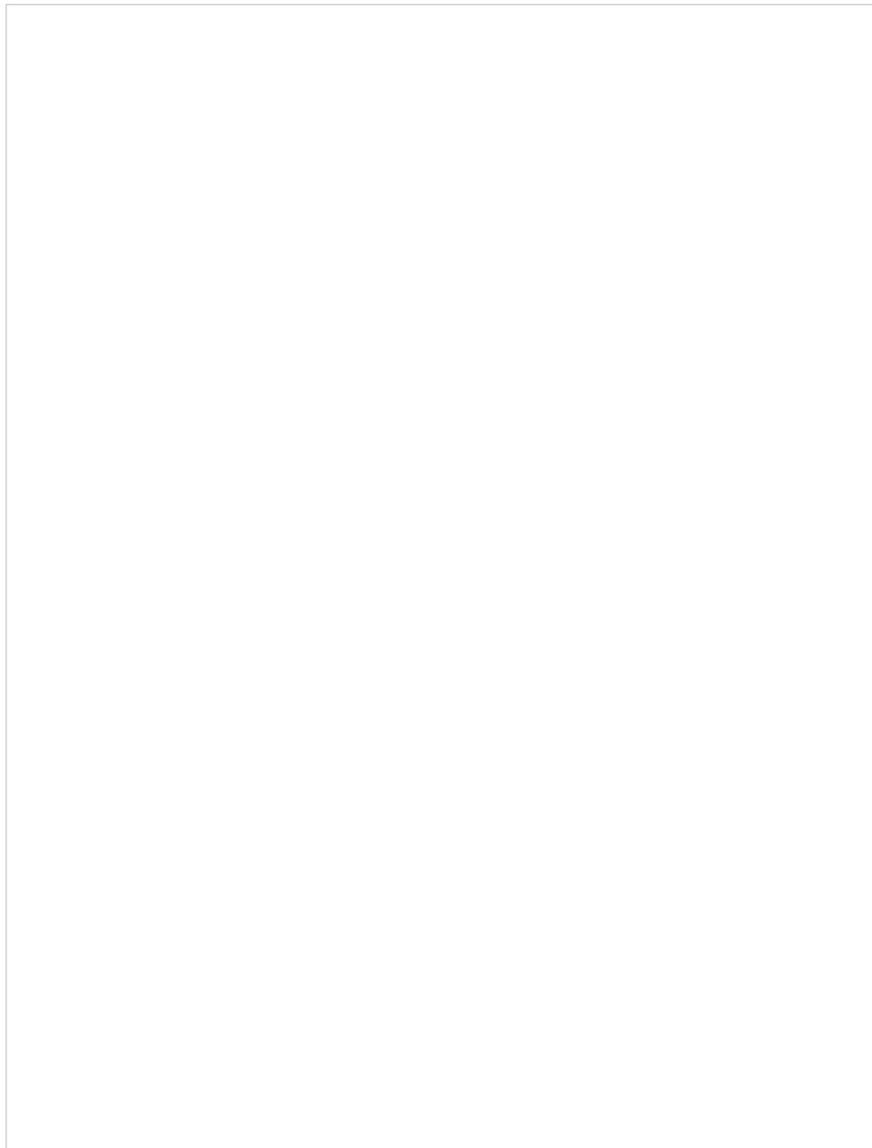
Email tab

Email Service Settings

Email tab settings are described as follows.

Acknowledgment

Acknowledgment is the message that will be sent as an immediate response to inbound emails associated with this service. Normally this is done to acknowledge receipt of the request and advise the sender about the estimated reply time.

Acknowledgment is not considered a reply and will not affect any metrics related to this service. Acknowledgment is only sent for the initial email in an [email thread](#).

Acknowledgments must initially be prepared as articles in the [Knowledge Base](#).

To select an article that will be used as an acknowledgment for the given service, click the link, enter some article keywords in the search field, and choose the language. A list of matching articles will be displayed in the list below. Select the desired article; it will be displayed in the preview field.

Note that in the current product version, acknowledgment can be defined in one language only.

Distribution method

Distribution method is the method of email delivery to the Agent Desktop.

With the **pull** method, all incoming emails remain in the service queue and will be visible to the agents of the teams associated with this service (see the description of the Assignments tab). The agents will be expected to select emails manually for processing from this queue.

With the **push** method, incoming emails are delivered directly to the Agent Desktop in the same manner as calls and chats. The agents will be able to either accept incoming email for immediate processing or move it to *My Queue* for processing at a later time. For information about agents' availability to process email interactions, see section [Omni-Channel Routing](#).

Note that the order in which incoming emails are delivered to agents (for the push method) or appear in the service queue (for the pull method) is determined first by priority and then by the shortest remaining time to breach the configured service level (see the description of the *Service Level* settings below). For more information about email priority, see section [Scenario Entries - Email](#).

Enable personal routing

Enable personal routing indicates whether personal email routing is enabled for this service.

If enabled, the system will attempt to deliver any email identified as part of an existing [email thread](#) to the agent who composed the previous reply within that thread.

Personal routing timeout

If personal routing is enabled (see *Enable personal routing* above), this timeout specifies for how long the system will wait for the agent who composed the previous reply to become available before switching to the regular distribution method involving all qualified agents.

This timeout is essential for the *push* method only. For the *pull* method, such emails will be immediately delivered to the agent's *My Queue*.

Return emails to general queue after

Return emails to general queue after specifies how long the system will wait (from the moment the email is placed in an agent's *My Queue*) before returning this email to the general service queue.

If the option to *return emails to general queue if SLA is breached"* is selected (see below), *such messages will be returned back to the general queue, even when they are put in the agent's* My queue *after the SLA is breached.*

Return emails to general queue if SLA is breached

This setting indicates whether emails that have breached service level while in *My Queues* will be returned to the general service queue. See the description of the following *Service Level* settings.

Service level, Replied emails

This setting specifies the percentage of emails associated with this service that are expected to be replied within the specified service level threshold (see below) relative to all replied emails.

Service level, Within threshold

Service level, Within threshold sets the service level threshold for this service. A service level threshold is the amount of time in which emails associated with this service are expected to get a reply. The reply time is measured from the moment the email is placed in the service queue to the moment when the first reply is sent. *Acknowledgement* (see above) is not considered a reply.

The email service level threshold can be specified either in hours or in days and in either case excludes the time that is outside of the [hours of operation specified for the given service](#)

Screenpop URL

Screenpop URL is the URL of the web page that will be displayed by the Agent Desktop application when the agent receives an email associated with the given service (e.g., [Salesforce.com synchronization](#)). A query string can be added to supply variables for the screen pop.

The following variables are supported:

- *$(item.from)* – sender's email address
- *$(item.to)* – emails address in the *To:* field
- *$(item.subject)* – content of email subject

The *Screenpop URL* parameter is optional.

Pre-defined Dispositions

This section provides descriptions of the predefined dispositions that are created by default whenever you define a new service. For general information about dispositions, their purpose, and configuration, see section [Dispositions Tab](#) of this guide.

Many dispositions defined apply to outbound campaigns only, and some of those are used for preview records only.

All dispositions in the *Connection Problem* folder are by default visible to agents. This is essential for [preview campaigns](#) where call progress is monitored by agents. If you are running a [predictive or progressive campaign](#) where the call progress analysis is performed by the system, you may consider hiding some of these dispositions. If you do so, it is recommended that you leave dispositions *Answering machine* and *Silence* visible to the agents.

Note: The dispositions that are hidden from the agents are shown in *italic*, both in the application and in the following list.

Final folder

The meaning of each predefined description is given as follows.

Add to DNC

The remote party requested that no further calls be made to his numbers.

Answer provided

The customer email was replied to and no follow-up is expected or necessary. This disposition closes the [email case](#).

Bad record

The agent reviewed the calling record and marked it as unusable (e.g., due to insufficient or corrupted data).

Message not sent

The outbound message failed to send. Note that the optional "Provider Code" column in campaign results may display error codes, if provided by the SMS carrier. For more information, see Administration Tutorials, section [Outbound Messaging Campaign Configuration](#).

Message sent

The outbound message was successfully sent.

Offer rejected

The business purpose of the call/chat was not fulfilled, but no follow up is required or expected by the customer.

Problem solved

The customer email confirmed successful resolution of the original matter (e.g., a thank you note) and was closed without reply. This disposition closes the [email case](#).

Product sold

The business purpose of the call/chat was fulfilled.

Record matches DNC

The attempted record matches an entry in one the associated record-based [DNC lists](#) (i.e. Do Not Call lists).

Spam

The content of the customer email had no connection to any services provided by the contact center. This disposition closes the [email case](#).

Non-final folder

Dropped while talking

The call was dropped (accidentally disconnected) while the conversation was in progress. This disposition can also be used for chats that were ended due to [customer inactivity](#).

Need more information

The customer email was replied to and some follow-up is expected. The [email case](#) stays open.

Number matches DNC

The attempted number matches a number in one of the associated number-based [DNC lists](#).

Wrong number

The person for whom the call was intended cannot be reached at this number.

Wrong person

The person who answered the call was not the person for whom the call was intended (but the latter may be reached at the same number later).

Connection problem folder

Announcement

The connected call attempt returned speech that was not live voice or an answering machine greeting. For example, this announcement can be an interactive voice response (IVR) announcement indicating that a company office was closed or an IVR menu asking to press a digit for the desired department.

Answering machine

The call was answered by an answering machine.

Busy

The called number was busy.

Fast busy

The call attempt returned the fast busy signal (reorder tone) indicating that the call cannot be established due to network congestion. Note that sometimes network operators also use *Fast Busy* to indicate invalid and/or disconnected numbers.

Fax or modem

The called line is connected to a fax or modem.

Invalid number

The call attempt returned a tone indicating that the dialed number was invalid.

Network announcement

The call attempt returned speech before connecting the call, such as a network message indicating, for example, that the call could not be established at this time.

No answer

The called party did not answer within [the *No Answer* timeout](#).

Other connection issue

This is the generic disposition reserved for any possible connection problems other than the ones specified above.

Silence

The call was established but no sound from the remote party could be detected for more than 5 seconds.

System folder

Agent failure

The call ended because of an Agent Desktop application failure.

Abandoned

The answered call was dropped before call progress analysis could be finished.

Call failed

Call or call attempt terminated externally with an unknown error code.

Congestion

This disposition is reserved for future use.

Disposition not found

Scenario attempted to set the interaction disposition to a value that could not be recognized.

Finalized by dial rule

Processing of this record was finalized by a dial rule.

No agent

The call was dropped after being answered by the called party because it could not be connected to an agent in a timely manner.

No disposition

The agent who handled this interaction did not select any disposition for it.

No numbers left to call

The maximum number of calling attempts has been reached for all numbers of this calling record and there are no more attempts for this record to be made. Note that this disposition is used only when the record contains multiple phone numbers and they are tried during the campaign. When list records contain only one phone number (or only one is used during the given campaign), the final disposition of the record that reached maximum attempts corresponds to the disposition of the last call attempt.

Phone network unavailable

The call could not be made because the public telephone network was not available.

Record expired

The calling record has expired. See section [Lists](#) for more information about the uses of record expiration mechanism and the related settings.

Skipped

The agent accepted the preview record and then skipped it (i.e., discarded the record without dialing).

System failure

The call ended because of a system failure.

Outbound - General

The following general campaign settings are configured in the *General* section of the Services and Campaigns [Outbound tab](#).

General Settings

Outbound campaign general settings

Type

This is the type of campaign. There are four different campaign types from which to choose.

- In campaigns of the *Preview* type, the calling records are submitted to the agents participating in the campaign. The agents review record information, dial destination numbers, and monitor call progress. Additionally, this type of campaign allows agents to be reserved for a requested callback without indication to the agent.
- In campaigns of the *Progressive* type, the system automatically dials numbers from list records according to a fixed (preconfigured) dialing rate, monitors call progress, and connects successful (answered) call attempts to available agents.
- In campaigns of the *Predictive* type, the system automatically dials numbers from list records according to currently optimal dialing rates, monitors call progress, and connects successful (answered) call attempts to available agents. The dialing rate is optimized to maintain the desired agent occupancy based on the statistical analysis of outcomes of most recent dialing attempts.
- In campaigns of the *Automatic (IVR)* type, the system automatically dials numbers from list records, monitors call progress, and connects successful (answered) call attempts to a prerecorded interactive voice response (IVR) message. Note that because agents are not involved in campaigns of this type, it may require different kind of license and may have to be explicitly enabled for you by your service provider.

Note that the definition of some of the subsequent campaign properties will depend on the selected campaign type.

Enabled

Enabled indicates the current state of the campaign. By default, the campaign is disabled and normally it should remain in this state until it is completely configured. Completeness of campaign configuration can be verified via the *Diagnostics* page. After the campaign has been completely configured, select the *Enabled* checkbox to indicate that it is ready to run.

Campaigns can be disabled again when they are no longer active but have to remain in configuration to ensure availability of campaign results. Note that disabling of campaigns is always a manual operation.

Note: For blended services, you should keep the outbound portion of a service enabled at all times, even during the periods without any outbound activity. If you disable the outbound portion, dispositions of the possible callbacks made to the campaign caller ID may not be processed correctly. This may result in repeated attempts to contact customers who are not supposed to be contacted again within the given campaign (e.g., accepted the campaign offer or requested not to be called again). If you need to prevent the outbound portion of a blended service from making calls, remove all of its calling hours.

Status

Status shows whether the outbound campaign has started or if it is stopped (i.e., ready to run). Click **Start** or **Stop** to change the status of the outbound campaign.

Start / Stop Automation

After the campaign has been enabled, it can be started and stopped manually at any time using these buttons.

Note that a campaign also can be started and stopped manually form the Agent Desktop application by a user designated as an operator for this campaign.

The campaign can be started and stopped automatically using the combination of the *From/Until* and *using hours of operation* settings as described below.

From

From indicates the moment from which this campaign can be started automatically based on the service *hours of operation* defined in the *Properties* tab.

If specified, the campaign will start automatically at the specified time provided that this time is within the specified service hours of operation. If the specified time is outside of the service hours, the campaign will start automatically at the nearest service opening time following the specified campaign start time.

Note that this parameter controls automatic campaign start only. Even if it is defined, the campaign can still be started earlier manually.

using hours of operation

By default, the campaign will be run automatically according to the *hours of operation* specified in the *Properties* tab for the given outbound service. If you click this link, you will be taken to the tab where you can modify the service hours.

Note that this schedule reflects the time when the agents of the associated teams will be expected to handle interactions of the given campaign. This schedule is normally defined for the time zone where your contact center is located. The actual calling schedules for various types of phones and other possible time-related calling restrictions are defined in the *Calling Hours* page relative to the time zone of destination phone numbers.

Until

Until indicates the moment when this campaign will be terminated automatically even if processing of some of the calling records has not been finished or attempted. This setting will not affect the campaign-related calls that may be in progress at the specified time.

Note that this parameter controls automatic campaign termination only. Even if it is defined, the campaign can still be [started or resumed manually](#) later.

Campaign link group

Campaigns of the same type with the same [hours of operation](#), and same [assigned agent teams](#) can be linked together so that, when processing of all records of one campaign is finished, the next campaign in the group will be started automatically.

To associate this campaign with an existing group select the group from the list. If there are other campaigns associated with the selected list, the system will ask you to confirm that the type of this campaign, its hours of operation, assigned teams, and skills will be redefined to match the corresponding settings of campaigns already in the group.

The service parameters whose settings are controlled by the link group membership will be highlighted with orange dots.

To remove the campaign from a link group it was previously assigned to, select **None** from the drop-down menu.

Begin this campaign after

By default, the order in which campaigns in the link group will be activated is determined by the order those campaign were added to the group. You can redefine this order for the given campaign by selecting the preceding campaign from the drop-down menu. If the given campaign shall be processed first, select **none (1st)**.

Preview Options
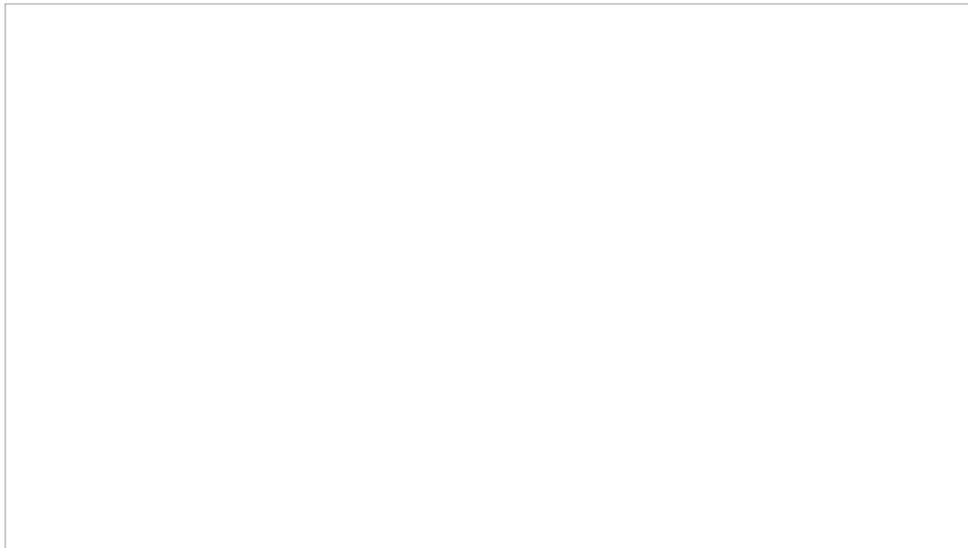
Preview options

Screenpop URL

Screenpop URL is the URL of the web page that will be displayed by the Agent Desktop application when the agent receives a preview record. Normally this is a web page that might contain further information about the calling record. A query string can be added to supply variables for the screen pop. See the group of variables *Outbound Target Work Item Parameters* in the *Scenario Builder Reference Guide.*

This parameter is optional. If it is not set, only the customer name and phone number to be dialed will be displayed in the contact panel of the Agent Desktop application.

Note that you can display information from calling records using Activity forms.

In addition, the specified web page will be displayed in the Context Information Area of Agent Desktop. This area is not shown when Agent Desktop is run minimized using the Pop-out function. Thus, when using URL screen pop, consider disabling agents' privilege *Force pop-out phone window*.

Screen-popping CRM URLs

When configuring the general properties of your preview campaign, you can enable specific Salesforce or Zendesk URLs to be screen-popped to the Agent Desktop.

For Salesforce Classic, Salescloud, and Lightning:

1. In the **Screenpop URL** field of Preview Options, enter the object ID (e.g., *$(workitem.otherInfo.SalesforceID)*).

2. Learn more about object ID and screen-pop configuration in the *Salesforce.com Integration Guide.*

For Zendesk:

1. In the **Screenpop URL** field of preview service, enter the ticket URL with the Zendesk ID (e.g., *tickets/$(workitem.otherInfo.ZendeskID)*).

2. Learn more about screen-pop configuration in the *Zendesk Integration Guide.*

Start dialing first number automatically

By default, agents dial numbers from list records manually. Select this checkbox if the first number of the list record shall be dialed automatically after the amount of time allocated for record preview (see option *Start dialing after*).

Start dialing after

Start dialing after is the amount of time allocated for list record preview. This parameter is essential only if option *Start dialing first number automatically* is enabled.

Use specific agent assignments for records

Records of the calling lists associated with the given campaign may be assigned to specific agents. If you select this option, any such records will be distributed only to the agents assigned to handle them. For more information, see the description of field type *Agent Login ID* in section Lists.

Limit manual outbound calls to numbers in lists and record manual call results in campaigns

When enabled, this setting allows manually dialed phone numbers to be included in outbound or blended campaigns, should the phone number match one of the campaign's dialable phone numbers; click-to-call numbers are also included. Once included in a campaign, manually dialed calls will be counted toward related campaign metrics.

Additionally, when this setting is selected, the following applies:

- Calls adhere to Do Not Call (DNC) lists and safe-calling hours
- Calls count toward dial attempts
- Dial rules by disposition are allowed
- Calls on closed records are prevented

Note that this checkbox is unchecked by default and this setting is not currently available for use with hardphones.

Predictive Options

Predictive options

No Answer timeout

If the ring back tone is received, *No Answer timeout* specifies for how long the system shall wait for an answer before abandoning the call attempt with the disposition *No Answer*.

Scenario to run when answered

Scenario to run when answered indicates which scenario should be run upon answer. The *Default* scenario will provide a simple connect to the longest available agent while the calls that are not connected to agents within the specified *Unattended call timeout* (see below) will be terminated.

Bright Pattern Contact Center provides a [scenario template](#) called *Predictive Telemarketing Campaign* that serves as an example of how unattended calls can be treated in a compliant manner (according to the current FCC regulations).

Detect voice before connection

This indicates whether, upon answer, the system shall wait to detect voice before connecting this call to an agent. Deselect this checkbox if the calls should be connected to agents immediately upon answer.

Detect answering machine

Detect answering machine indicates whether upon voice detection the system shall try to distinguish live voice from an answering machine greeting or other prerecorded announcement. This setting is essential only if the *Detect voice before connection* setting is enabled (see above). Deselect this checkbox if the calls should be connected to agents immediately upon detection of a voice.

Wait for beep when detecting answering machine

This indicates whether the "announcement vs. answering machine" decision shall be based on detection of a beep sound after the speech segment. (If disabled, disposition *Announcement* will be used for all long speech messages.) It is essential only if the *Detect answering machine* setting is enabled (see above).

Record CPA phase of call attempts

Record CPA phase of call attempts indicates whether the Call Progress Analysis (CPA) phase of the campaign calls shall be recorded. Such recordings are stored in separate audio files and can be used to verify reaction of the system to various call attempt outcomes. CPA recordings can be checked using the [Quality Management playback function](#) and also [exported](#) for offline analysis.

This option is visible and available to you only if specifically activated for your contact center at the service provider level.

Unattended call timeout

Unattended call timeout specifies for how long, from the moment a call is answered by the called party, the default scenario will wait until terminating this call. Note that this setting only applies if the **<<Default scenario>>** is selected as the [scenario to run when answered](#).

If you apply any other scenario to process answered call attempts (i.e., select anything other than **<<Default scenario>>** as the scenario to run when answered), you should set the unattended call timeout as the last interval of the [Find Agent block](#) of the given scenario. You should also define the action applied to such unattended calls when the timeout expires as the conditional *Time Out* exit of the given block.

Bright Pattern Contact Center provides a [scenario template](#) called *Predictive Telemarketing Campaign* that serves as an example of how unattended calls can be treated in a compliant manner (according to the current FCC regulations). In this scenario template, the interval of the Find Agent block is set to 0-2 seconds and its *Time Out* conditional exit starts an IVR script that introduces the caller and provides the called party with an opt-out option.

Maximum dropped calls (reporting threshold), %

This setting is reserved for future use.

Dialer Aggressiveness

Target occupancy, %

This setting is used in Predictive mode only.

Target occupancy specifies the target occupancy for the agents participating in this campaign that will be used by the predictive algorithm to calculate the dialing frequency. Occupancy is defined as the time spent handling calls relative to the time total working time--that is, *(Busy Time + ACW Time) / (Busy Time + ACW Time + Ready Time) * 100*.

Changes in the target occupancy of a running campaign will take effect immediately. Such changes may be necessary in order to observe compliance with the telemarketing law for maximum percentage of unattended calls (also known as *abandonment rate*). The percentage of unattended calls can be monitored in real time (see section General Campaign Metrics View of the *Supervisor Guide*) and/or historically (see section Telemarketing Compliance Report of the *Reporting Reference Guide*).

Initial Overdial Rate, %

This setting is used in Predictive mode only.

Initial Overdial Rate, % specifies the percentage of call attempts that will be made for this campaign relative to call attempts that are expected to be answered. This configured value will determine the dialing frequency at the start of this campaign. For example, if you expect only every second attempt to be successful, you can set the initial overdial rate to 200%, and the system will initially make twice as many call attempts as there are agents in the *Ready* state.

Note that this setting is an inversion of the *Estimated Success Rate* (ESR), which was used in the product prior to Bright Pattern Contact Center version 3.10 for the same purpose. The ESR is defined as the expected percentage of call attempts that will be answered relative to all call attempts that will be made for this campaign; thus, if you upgrade from a previous version of Bright Pattern Contact Center and the ESR for a particular campaign was set to 50%, you will see the *Initial Overdial Rate* for this campaign set to 200%. (The ESR is displayed as a read-only value next to it.)

Once the system has accumulated enough statistics for dial frequency prediction, the configured Initial Overdial Rate value will be replaced with the actual overdial rate calculated and constantly updated in real time.

You can reset statistics used in calculation of the actual success rate and reapply the configured Initial Overdial Rate value at any time during campaign operation by clicking the **Reset statistics** button.

Limit manual outbound calls to numbers in lists and record manual call results in campaigns

When enabled, this setting allows manually dialed phone numbers to be included in outbound or blended campaigns, should the phone number match one of the campaign's dialable phone numbers; click-to-call numbers are also included. Once included in a campaign, manually dialed calls will be counted toward related campaign metrics.

Additionally, when this setting is selected, the following applies:

- Calls adhere to [Do Not Call (DNC) lists](#) and [safe-calling hours](#)
- Calls count toward dial attempts
- [Dial rules by disposition](#) are allowed
- Calls on closed records are prevented

Note that this checkbox is unchecked by default and this setting is not currently available for use with hardphones.

Progressive Options

Progressive options

No Answer timeout

If the ring back tone is received, *No Answer timeout* specifies for how long the system shall wait for an answer before abandoning the call attempt with the disposition *No Answer*.

Scenario to run when answered

Scenario to run when answered indicates which scenario should be run upon answer. The *Default* scenario will provide a simple connect to the longest available agent while the calls that are not connected to agents within the specified *Unattended call timeout* (see below) will be terminated.

Bright Pattern Contact Center provides a [scenario template](#) called *Predictive Telemarketing Campaign* that serves as an example of how unattended calls can be treated in a compliant manner (according to the current FCC regulations).

Detect voice before connection

This indicates whether, upon answer, the system shall wait to detect voice before connecting this call to an agent. Deselect this checkbox if the calls should be connected to agents immediately upon answer.

Detect answering machine

Detect answering machine indicates whether upon voice detection the system shall try to distinguish live voice from an answering machine greeting or other prerecorded announcement. This setting is essential only if the *Detect voice before connection* setting is enabled (see above). Deselect this checkbox if the calls should be connected to agents immediately upon detection of a voice.

Wait for beep when detecting answering machine

This indicates whether the "announcement vs. answering machine" decision shall be based on detection of a beep sound after the speech segment. (If disabled, disposition *Announcement* will be used for all long speech messages.) It is essential only if the *Detect answering machine* setting is enabled (see above).

Record CPA phase of call attempts

Record CPA phase of call attempts indicates whether the Call Progress Analysis (CPA) phase of the campaign calls shall be recorded. Such recordings are stored in separate audio files and can be used to verify reaction of the system to various call attempt outcomes. CPA recordings can be checked using the [Quality Management playback function](#) and also [exported](#) for offline analysis.

This option is visible and available to you only if specifically activated for your contact center at the service provider level.

Unattended call timeout

Unattended call timeout specifies for how long, from the moment a call is answered by the called party, the [Find Agent block](#) of the applied scenario (see *Scenario to run when answered* above) will wait for an available agent before processing it in the manner defined by the conditional exit *Time Out*.

Note that the *Default* scenario will terminate such calls.

Bright Pattern Contact Center provides a [scenario template](#) called *Predictive Telemarketing Campaign* that serves as an example of how unattended calls can be treated in a compliant manner (according to the current FCC regulations).

Maximum dropped calls (reporting threshold), %

Enter the maximum percentage of allowable dropped calls.

Progressive Power Dialing

Overdial Rate, %

This setting is used in Progressive mode only.

Overdial Rate, % specifies the percentage of call attempts that will be made for this campaign relative to call attempts that are expected to be answered. This configured value will determine dialing frequency for the duration of the campaign. For example, if you expect only every second attempt to be successful, you can set the initial overdial rate to 200%, and the system will make twice as many call attempts as there are agents in the *Ready* state.

Setting the Overdial Rate to 100% (default) practically means that for any answered call, there will be an agent available to accept it.

Limit manual outbound calls to numbers in lists and record manual call results in campaigns

When enabled, this setting allows manually dialed phone numbers to be included in outbound or blended campaigns, should the phone number match one of the campaign's dialable phone numbers; click-to-call numbers are also included. Once included in a campaign, manually dialed calls will be counted toward related campaign metrics.

Additionally, when this setting is selected, the following applies:

- Calls adhere to [Do Not Call (DNC) lists](#) and [safe-calling hours](#)
- Calls count toward dial attempts

- [Dial rules by disposition](#) are allowed
- Calls on closed records are prevented

Note that this checkbox is unchecked by default and this setting is not currently available for use with hardphones.

Automatic (IVR) options

Automatic IVR options

Max concurrent calls

This option specifies how many calls can be in progress simultaneously.

No Answer timeout

If the ring back tone is received, *No Answer timeout* specifies for how long the system shall wait for an answer before abandoning the call attempt with disposition *No Answer*.

Scenario to run when answered

Scenario to run when answered indicates which scenario should be run upon answer. Note that for Automatic (IVR) mode, the scenario containing a recorded IVR message should be explicitly defined.

Detect voice before connection

This option indicates whether upon answer the system shall wait to detect a voice before connecting this call to an agent. Deselect this checkbox if the calls should be connected to agents immediately upon answer.

Detect answering machine

Detect answering machine indicates whether, upon voice detection, the system shall try to distinguish the voice from an answering machine greeting. It is essential only if the *Detect voice before connection* setting is enabled (see above). Deselect this checkbox if the calls should be connected to agents immediately upon detection of a voice.

Wait for beep when detecting answering machine

This option indicates whether the "announcement vs. answering machine" decision shall be based on detection of a beep sound after the speech segment. (If disabled, the disposition *Announcement* will be used for all long speech messages.) It is essential only if the *Detect answering machine* setting is enabled (see above).

Record CPA phase of call attempts

Record CPA phase of call attempts indicates whether the Call Progress Analysis (CPA) phase of the campaign calls shall be recorded. Such recordings are stored in separate audio files and can be used to verify the reaction of the system to various call attempt outcomes. CPA recordings can be checked using the [Quality Management playback function](#) and also [exported](#) for off-line analysis.

This option is visible and available to you only if specifically activated for your contact center at the service provider level.

Limit manual outbound calls to numbers in lists and record manual call results in campaigns

When enabled, this setting allows manually dialed phone numbers to be included in outbound or blended campaigns, should the phone number match one of the campaign's dialable phone numbers; click-to-call numbers are also included. Once included in a campaign, manually dialed calls will be counted toward related campaign metrics.

Additionally, when this setting is selected, the following applies:

- Calls adhere to [Do Not Call (DNC) lists](#) and [safe-calling hours](#)
- Calls count toward dial attempts
- [Dial rules by disposition](#) are allowed
- Calls on closed records are prevented

Note that this checkbox is unchecked by default and this setting is not currently available for use with hardphones.

Outbound - Calling Hours

This section describes the campaign calling hours that are configured in the *Calling Hours* section of the Services and Campaigns [Outbound tab](#).

Calling hours determine time intervals within which calls to specific destination phone numbers can be made. All hours defined in this tab are specified for the time zone of the destination number to be called.

Note that campaigns also have general hours of operation. See the description of the property *using hours of operation* of the [*General* tab](#). Note that hours of operation are defined in the time zone where your contact center is located.
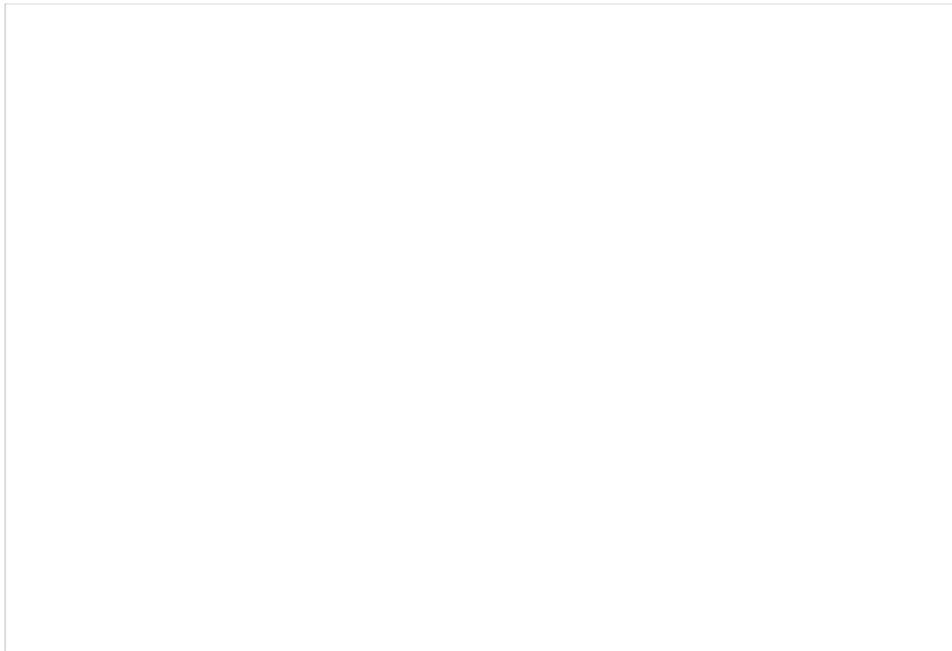
Services & Campaigns > Outbound Voice Service > Outbound > Calling Hours

Calling Hours Configuration

Calling Hours table

This table defines calling schedules for phones of specific types and the order in which phones of different types will be called within each such schedule. For example, you can define that only mobile numbers will be called during the day, while during the evening hours, home phone numbers will be called first, and then mobile phones will be tried.

Note that specification of calling schedules is mandatory. That is, you must define a schedule even if the associated calling lists contain only one type of phone. Note also that the system does not check whether these hours fit within the general campaign's hours of operation specified by *Start/Stop Automation* settings of the *General* page.

To define a schedule

1. Click **add schedule** in the *Hours* column.
2. Select a calendar.
3. Specify the calling hours. (See section *Calendars* for more information. A schedule can have several calendars, each with its own hours of operation.)
4. Click **add** to add another calendar (if desired).

To apply the schedule to a particular phone type

1. Click **add** in the *Phones to call, by preference* column. The drop-down menu that appears will contain the phone types from the list(s) associated with this campaign.
2. Select the phone type to which this calling schedule will apply. The same schedule can be used for multiple phone types.
3. Click **add** again to add another phone type to the same schedule.

Note that the order in which phones of the same record will be called within the given schedule is determined by the order in which they appear in this list. You can change the original order at any time by dragging a phone type to a new desired location in the list.

Repeat these steps to create additional schedules.

For the USA, Canada, Mexico, Brazil, Russia, Indonesia, and Australia, the adjustment of calling hours for time zones of destination numbers is performed using area codes. For all other supported countries, adjustment is performed using the country code only. Thus, in order for any restricted calling hours to work properly, destination phone numbers must start with a country code. In other words, unless the campaign is set to be open 24/7, any numbers without a country code will be skipped. Note that a country code can be added to imported numbers automatically as part of the list import process.

For the list of countries for which the adjustment of calling hours is currently supported, see section Countries, Codes, and Time zones. Note that if a number in the calling list begins with a calling code that is not on that list, it will be dialed only if (1) the campaign calling hours for the corresponding phone type are set to 24/7, and (2) the *Comply with State calling hours* checkbox (see below) is not selected.

Use safe calling hours

Select this checkbox to enable an additional time zone check using the postal code.

Without the *Use safe calling hours* option selected, the adjustment of calling hours for time zones of destination numbers is performed using the area codes only. If this option is selected, both the time zone associated with the area code and the time zone associated with the postal code is checked. If they are the same, this option does not have any special meaning. If they are different, calling the corresponding number will take place only during the "safe" window (i.e., when the campaign is open in both time zones).

Note: This setting currently works only for US zip codes.

Comply with State calling hours

Many countries impose restrictions on the hours when consumers can be called by businesses. In some countries, such restrictions may differ from one state/province to another. For information about configuring state- and nation-wide calling hour restrictions, see section State Calling Hours.

Select this checkbox if you would like to observe the configured State Calling Hours while making calls for this campaign. If this checkbox is selected, the country/state information of the calling list record will be checked against the configured hours, and the call attempt will only be made if the current day and time fit within the permitted calling window.

Note that the system first looks for state information in the list field of the *State/Province* column type. If this field is absent/undefined, the system will try to look up the state information using the value of the *Postal Code* field. Area codes are not used to determine state information.

To review and/or change the configured restrictions, click the **State calling hours** link.
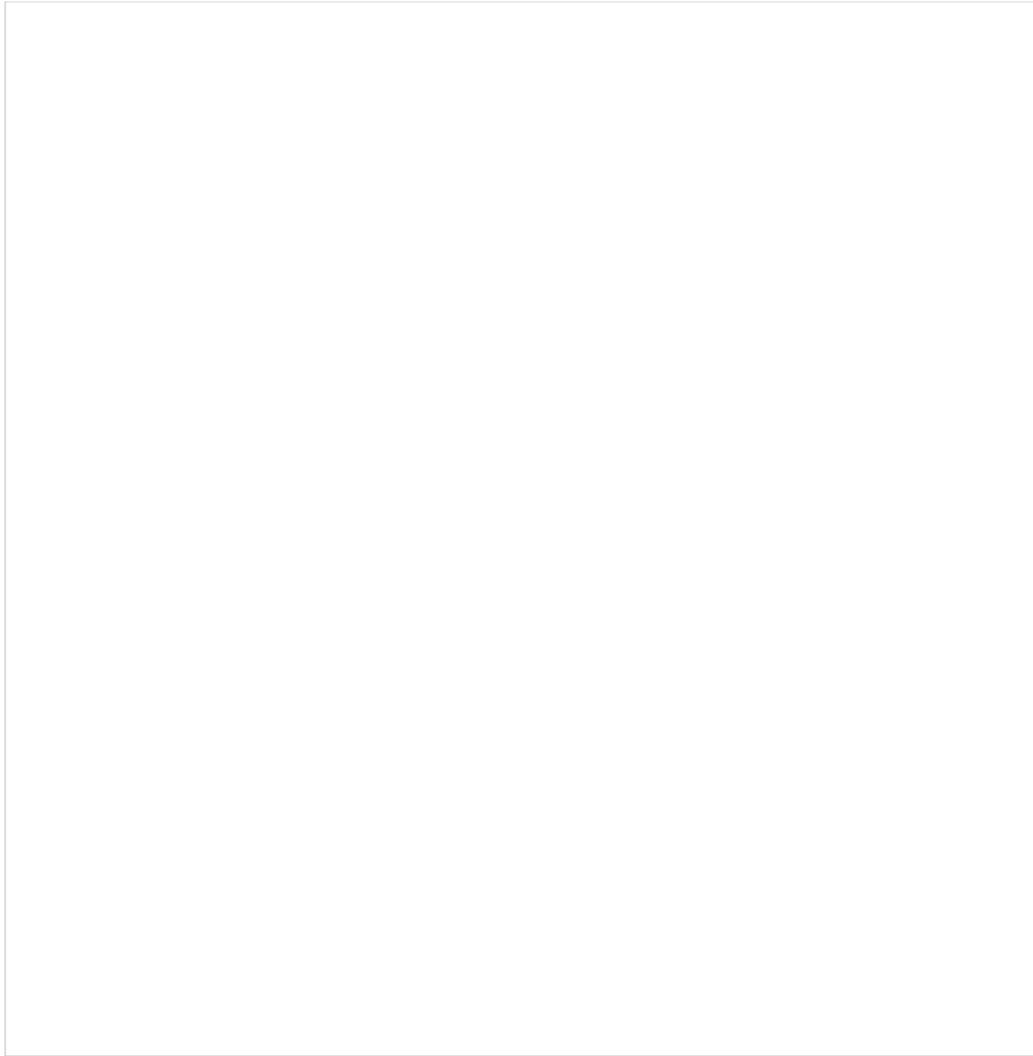
Outbound - Dial Rules

This section describes the campaign dial rules that are configured in the *Dial Rules* section of the Services and Campaigns' [Outbound tab](#).

The *dial rules* put limits on the number of call attempts, as well as specify actions that are to be taken with respect to records that have not been finalized within a current dialer's pass through the calling list. (A *pass* is a part of the campaign during which the dialer tries all dialable records in associated calling lists.)

During each pass, the dialer selects records from enabled lists associated with the given campaign, taking into account the following factors (in the order of priority):

1. [List order](#) (if multiple lists are assigned to the campaign)
2. [Dialing ratio](#) (if multiple lists are assigned to the campaign with the same [list order](#))
3. Records marked as [priority records](#) within the list. Note that the priority setting only affects the first attempt to dial the record; for any possible subsequent attempts, the prioritized record will be treated as a regular record. Priority of records also may be set to expire after a specified time period.
4. Rescheduled records that are due for the next call attempt. Note that rescheduling may be defined as a window (i.e., have both the start and end time). When the end time is reached, the record is no longer treated as a rescheduled one (even if it could not be called during its reschedule window) and becomes a regular record processed in the general sorting order.
5. [Sorting order](#) configured for the list within the given campaign.

The above general record selection order may be further affected by the *Perform full passes through list* setting.

Dial Rules Page Settings

Maximum attempts per record

This setting specifies the maximum number of calling attempts for one list record within the campaign. If the specified number of attempts for a particular record is reached, it will not be attempted again. If the calling record has only one number, the record disposition in this case will correspond to the disposition of the last call attempt. If the record contains multiple phone numbers and they are tried during the campaign, the disposition in this case will be set to *No numbers left to call*.

Maximum attempts per number

Maximum attempts per number specifies the maximum number of calling attempts for the same phone number within a record.

Attempt all numbers in record first

Use this setting to redefine the order in which multiple phones of the same record will be dialed relative to the other records of the same list.

By default, the Dialer will pull a number of records into memory for dialing. By choosing the option to *Attempt all numbers in record first*, the dialer will attempt the subsequent numbers on the already attempted records, before pulling additional new records into memory for dialing, assuming there are no additional changes to consider (i.e., new agents have been added to the pool and the and initial records in memory must be extended).

Without the *Attempt all numbers in record first* option selected, the dialer will dial through all records on first number before attempting to dial on any subsequent numbers in the record.

Perform full passes through list

By default (with the checkbox selected), during a dialer's pass through a calling list, each dialable record is attempted once. That is, once the dialer starts a pass, it will select records for dialing one by one according to the specified sorting order until it reaches the end of the list. After that, the next pass through the list will begin. Thus, if the list is updated incrementally, new records may or may not be called during the current pass depending on their position in the list (which is determined by the applied sorting order). This default setting can be recommended when all records in the associated calling lists have relatively similar value and it is important that all of them are attempted during the given campaign.

With the checkbox unselected, the dialer will always look for the next dialable record from the top of the list. This may be desirable when new records are [added periodically](#) to an active calling list and the sorting order is used to define relative value of records within that list (e.g., more recent leads have a higher conversion rate). This setting guarantees that new high-value records appearing at the top of the list will be attempted as soon as they are added to the list. Note that in this case the end of the list may never be reached (e.g., with a long original list, frequent updates, and/or large number of high-value records in those updates).

To further illustrate how this option works, consider the situation where you add new records to a list in a running campaign and, according to the specified [sorting order](#), they are positioned at the top of the list:

- With this checkbox selected (default), the dialer will finish the current pass first and the new records will be called only on the next pass through the list.
- With the checkbox unselected, the dialer will start calling these new records immediately.

List of dial rules by disposition

This list contains the [dispositions](#) that are defined for the given outbound campaign and indicate that the record processing within the campaign has not been finalized. (These include any system dispositions indicating unsuccessful interaction processing with possible subsequent attempts as well as any custom dispositions of type *Continue*.)

Default actions are provided for all such dispositions. For custom dispositions of type *Continue*, the default action is *Reschedule (24h)*. To modify the default action for a particular disposition, double-click the corresponding table row and specify the desired action in the *Edit Dial Rule* dialog that appears.

Edit Dial Rule Dialog Settings

To edit a Dial Rule, double-click on any entry in the list. Double-clicking brings up the *Edit Dial Rule* dialog window with the following settings to specify.

The Edit Dial Rule dialog window is where you update settings for each dial rule of the outbound voice campaign

Disposition

Disposition displays the selected disposition. It is read-only.

Retry

Retry indicates whether the called phone number shall be retried within a short period of time. Retries are to be used for dispositions indicating attempt failure due to a short temporary condition (e.g., *Busy* or *Phone network unavailable*). Such retries are considered to be part of the same calling attempt. Select the checkbox to enable retries for the given disposition.

Maximum retries

This is the maximum number of retries per calling attempt. *Maximum retries* must be specified if the *Retry* option is selected.

Retry interval

Retry interval is the period of time in minutes between retries. It must be specified if the *Retry* option is selected.

Action

Action is what will be applied when a calling attempt produces the selected disposition. The following types of actions are available:

- **Run scenario**: A specified scenario will be applied to this call attempt. This can be used, for example, to leave a prerecorded message on the customer's answering machine.

Note that this action will work:

- - Only for Predictive/Progressive and Automatic campaigns
  - Only for call attempts that received an answer from the called party (i.e., a scenario cannot be run for call attempts that received *Busy* or *No Answer*)

- And only if such answered call attempts do not result in connections to agents (i.e., a scenario can be run for an automatically detected *Answering Machine*, *Fax*, or *Silence*)
    - In the above example, if an answering machine is recognized automatically, the call can be further processed by the specified scenario. If the call was connected to the agent, and the agent set the disposition to "Answering Machine," the scenario will not be automatically applied; however, the agent can transfer this call to the scenario manually.
    - Note that system dispositions that do not follow voice media creation protocols (e.g., "Fax Machine" or "System disconnect") cannot fire scenarios.
- **Stop calling number**: No more attempts to call this number within this campaign will be made.
- **Stop calling number for all campaigns**: This number will no longer be attempted as part of the calling list where it is defined.[1]
- **Stop calling record**: All attempts to call any number from this record within this campaign will be stopped.
- **Wait**: Processing of the corresponding record will continue according to the general dial rules for this campaign. If, according to the general dial rules, the record should be dialed again, the next attempt will begin no sooner than the specified *Min wait time*. The delay is introduced to avoid immediate repeated attempts to call same records in small or nearly completed calling lists.
- **Reschedule**: Another calling attempt for this number within this campaign will be scheduled. If this disposition is visible to agents, they will be able to schedule the next call attempt manually. For records with multiple phone numbers, note the following:
    - If a new call attempt is scheduled manually, this attempt will be made to the number specified by the agent. Until then, all other numbers in the record will be ignored.
    - If a new call attempt is scheduled automatically, processing of other numbers in the record will depend on the setting for "Attempt all numbers in record first" option (see above). If this option is selected, the system will still attempt all numbers in the record that follow the number for which the rescheduling was performed (as specified in the campaign's calling hours). Otherwise, all such numbers will be ignored until the rescheduled attempt is made.

Min wait time

See the description of the action *Wait*.

Reschedule interval

Reschedule interval is the amount of time in hours in which another attempt to call this number will be made if *Action* is set to *Reschedule*. Note that manual rescheduling takes priority over the default reschedule interval specified here.

Scenario

This is the *scenario* that will be applied to the call attempt. It must be specified if *Action* is set to *Run scenario.*

Outbound - DNC

This section of the Services & Campaigns Outbound tab is used to specify the Do Not Call (DNC) lists against which the calling records to be dialed during the given campaign will be checked. Records whose elements match corresponding elements of any of the specified DNC lists will not be dialed. For more information, see section Do Not Call Lists.
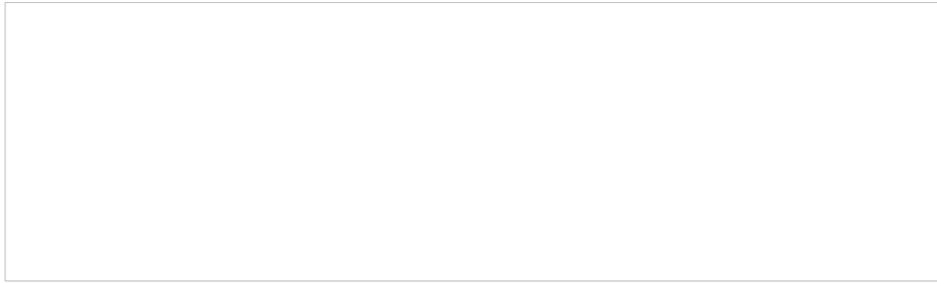
Campaigns & Services > Outbound Voice Service > Outbound > DNC

To add a DNC list:

1. Log in as Admin to the Contact Center Administrator application.
2. Navigate to *Campaigns & Services > Outbound Voice Service > Outbound > DNC.*
3. Click **add**.
4. Select the desired **DNC List** from the drop-down menu.
5. Specify the *disposition* that will be attached to the call attempts whose phone numbers match numbers in this DNC list.

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

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

Outbound - Diagnostics

This section of the Services & Campaigns [Outbound tab](#) can be used to verify the correctness and completeness of campaign configuration. The system checks the elements of the current campaign configuration and indicates potential problems. For the recommended process of outbound campaign configuration, see section [Outbound Campaign Configuration](#).

Services & Campaigns > Outbound Voice Service > Diagnostics

You can refer to this *Diagnostics* page at any time during the campaign configuration process. For elements that are not configured yet or should be corrected, clicking **edit** will take you to the application screen where the corresponding configuration tasks can be accomplished. Remember that clicking **edit** takes you away from the *Diagnostics* tab, and you will have to either click your browser's Back button to get back to it or navigate back to the *Diagnostics* tab again.

Note that this page also can be consulted in case of problems with campaigns that are already running, as some of such problems can be caused by dynamic configuration changes.

As shown, you can see examples of the type of completeness checks provided by the*Diagnostics* tab. The problem is described in detail, and the **edit** link brings you to the page to fix it:
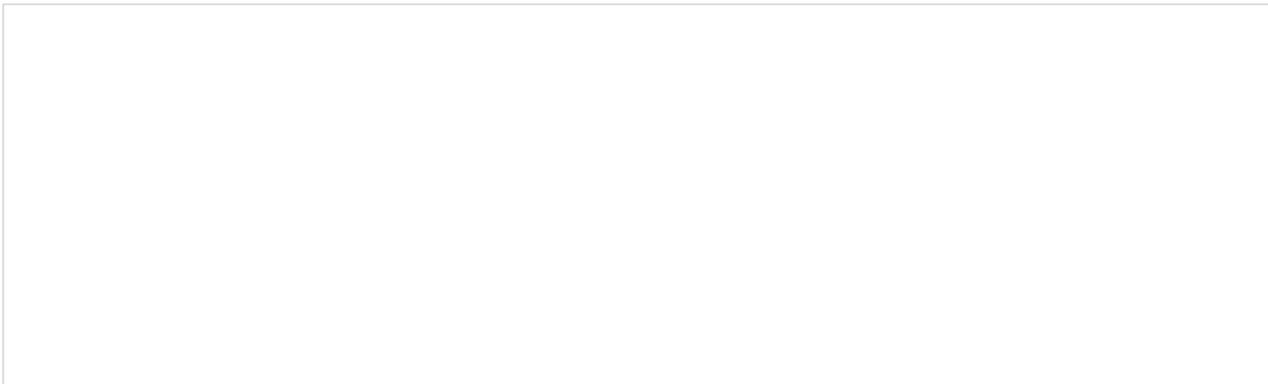
Examples of configuration checks

Note that you will not necessarily see those same configuration checks in your system; those given are to be used as examples only. The fewer configuration checks you see, the better. When you open the *Diagnostics* and it appears to be empty, then you know that your campaign configuration is OK.

1. ↑ **Note**: If this action is set as the default, the note "The number has been disabled in list" can be posted by the system in [One-Time Campaign Results](#) when it detects an invalid number.