

5.3 Tutorials Overview

Bright Pattern Documentation

Generated: 9/28/2021 7:18 pm

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Table of Contents

Table of Contents	2
About Tutorials for Admins	3
Guide Sections	3
Configuration Quickstart	4
Step 1: Log in	4
Step 2: Adjust application settings	4
Step 3: Create user accounts and teams	5
Step 4: Update general settings	7
Step 5: Specify email settings	8
Step 6: Configure voicemail	9
Step 7: Configure audio for pre-recorded messages	9
Step 8: Specify call recording settings and grading categories	10
Step 9: Define operational schedules of your contact center	11
Service Configuration Quickstarts	12

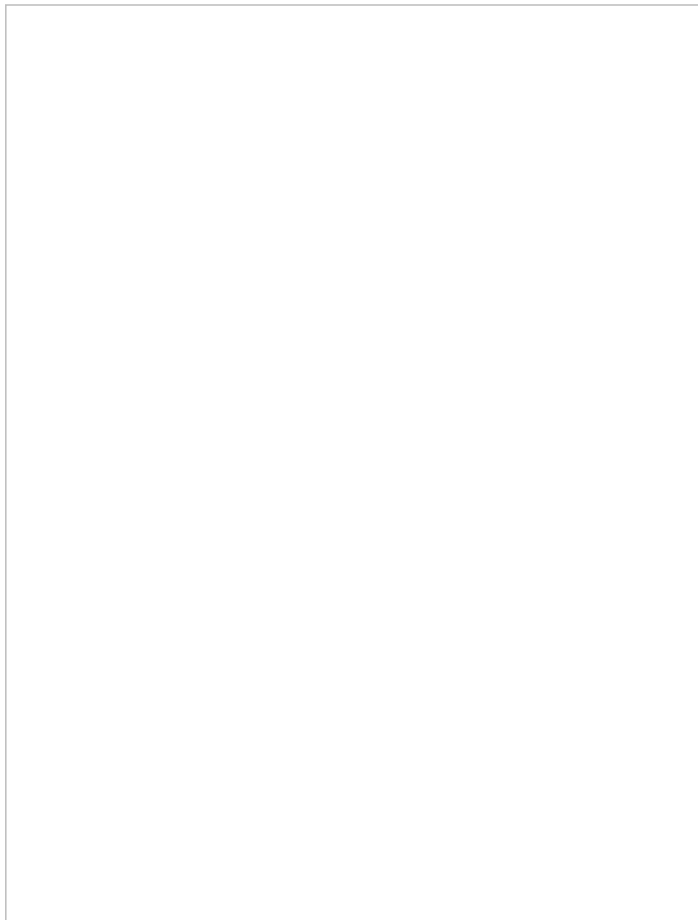
About Tutorials for Admins

Tutorials for Admins is a collection of articles that explain how to accomplish specific goals using Bright Pattern's Contact Center Administrator application. Step-by-step tutorials cover various topics related to configuration, integrations, setting up services, building scenarios, AI and bots, and much more.

Guide Sections

The guide contains articles about the following topics:

- [AI and Bots](#)
- [Chat](#)
- [Configuration](#)
- [Forms](#)
- [Integrations](#)
- [Scenarios](#)
- [Service Configuration](#)
- [Voice](#)



An example scenario configuration

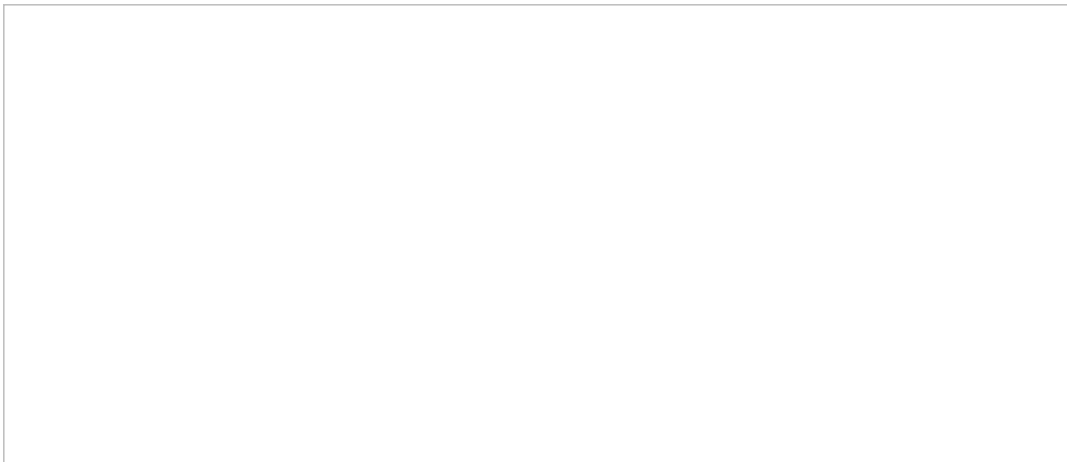
Configuration Quickstart

This section describes the recommended order of configuring common contact center tasks within Bright Pattern's Contact Center Administrator application.

This quickstart will help you get your contact center up and running quickly, regardless of whether the contact center will be used for inbound services, outbound campaigns, or both. Note that every contact center environment is unique, and the following information is meant to be used as a general guideline only.

Step 1: Log in

Using the [login procedure](#), go to <https://<your.tenant>.brightpattern.com/admin> and log in with your username and password.



Contact Center Administrator login

Step 2: Adjust application settings

Update Contact Center Administrator's [application settings](#) to

- Set your preferred time zone and language
- Change the password, if necessary

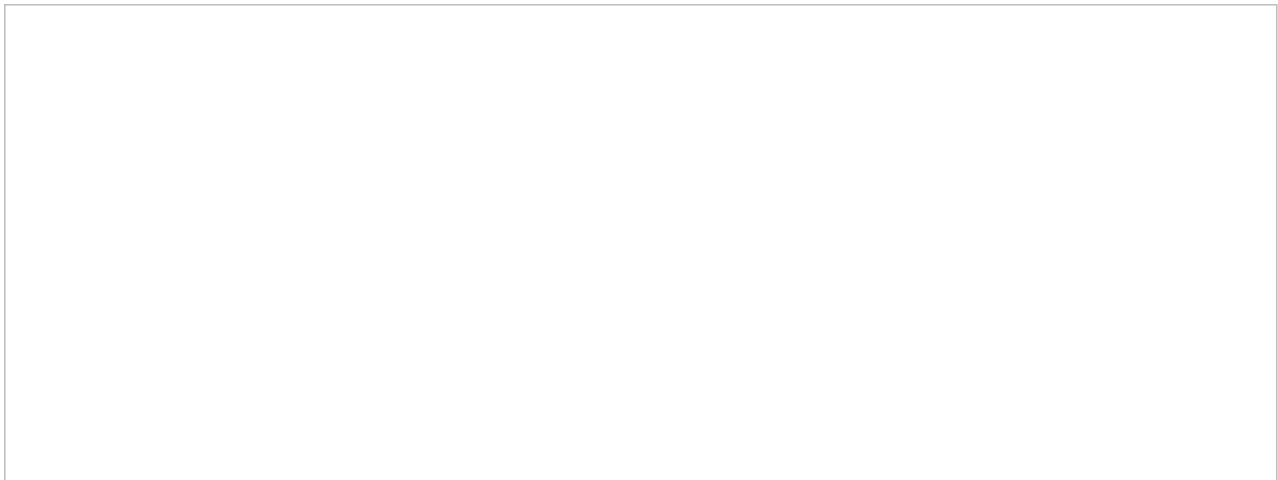
Note that the time zone should match the time zone set in [General Settings](#).



Settings for changing time zone, language, and password

Step 3: Create user accounts and teams

1. Create [user](#) accounts for yourself and other users who will be configuring and managing this contact center. Initially, these users can be members of the default Administrators team.



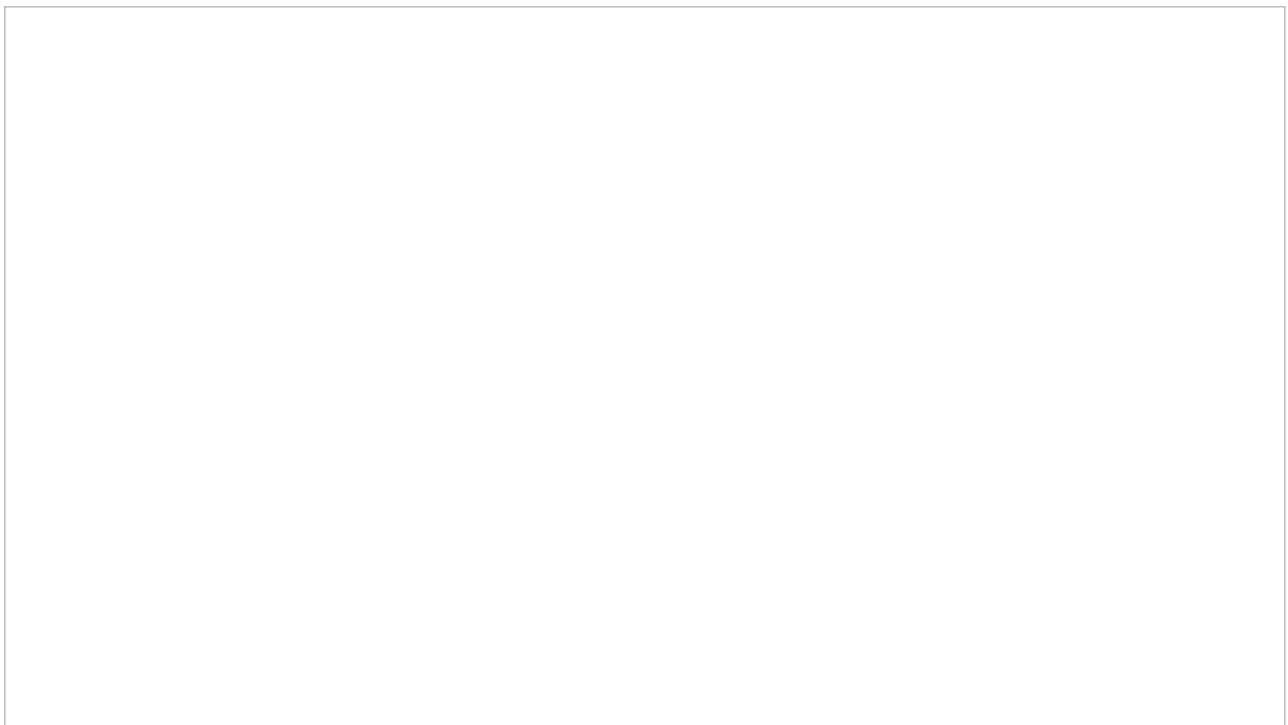
Add users to your contact center

2. Assign those users the appropriate [role\(s\)](#) that will enable them to perform their tasks.



Select roles for the user

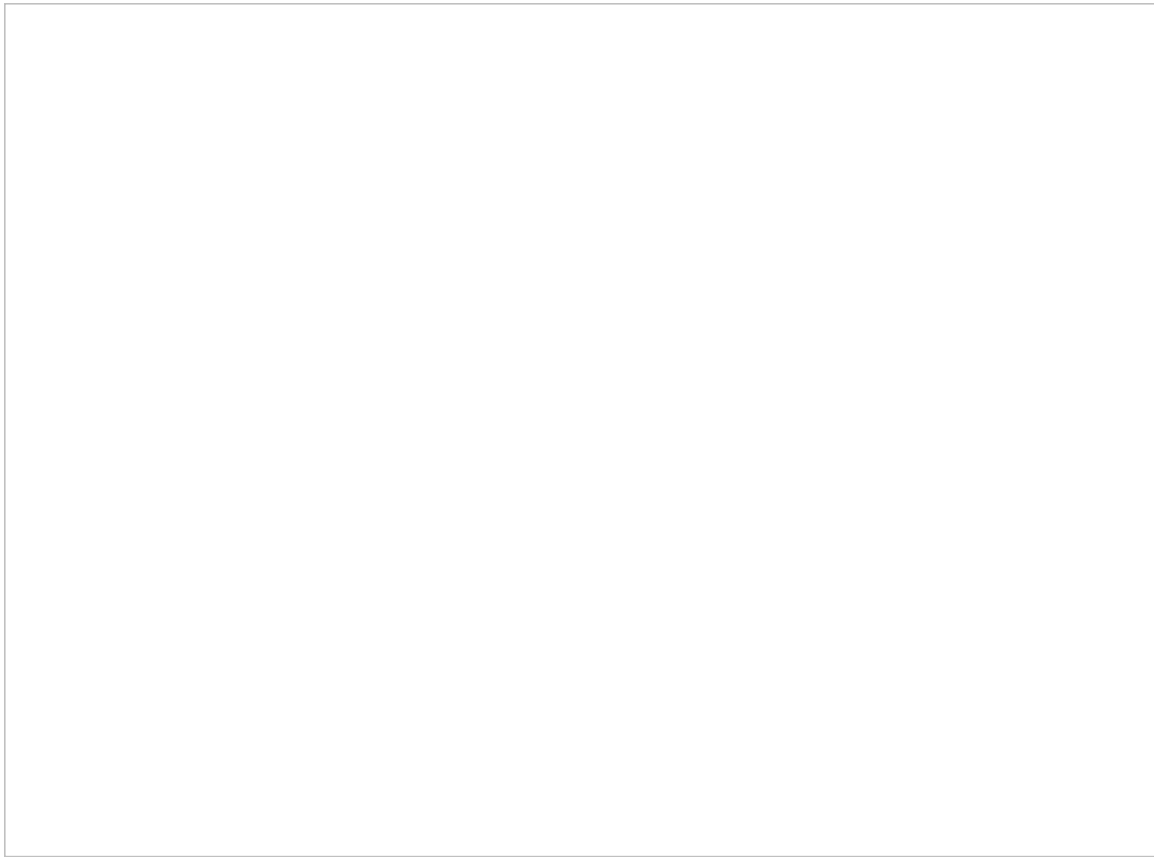
3. Add [teams](#) to your contact center, giving them descriptive names and defining team-specific settings.



Name and define the teams to which users will be assigned to work

4. Create or import [users](#).
 1. Give them the appropriate [role](#) (e.g., “agent” or “supervisor”).
 2. Assign users to a specific team.
 3. Consider uploading photos for all users (if you plan to use chat media to serve your customers and/or for internal communications).

5. Go back to *Users* > [Teams](#), and assign users to supervise specific agent teams. Note that a user must be added to a team as a designated supervisor in order to use the supervisor functions in Agent Desktop.
6. Grant [privileges](#) for each [role](#) type.



Privileges enable users to access specific features and functions

Step 4: Update general settings

Review and change the default values of the [general settings](#) that apply to the entire contact center, specifically for the users on Agent Desktop.

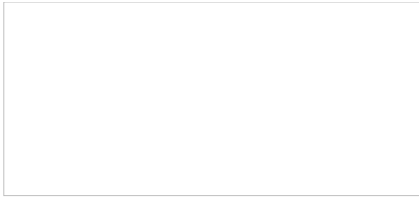


Update system-wide settings for your contact center

Step 5: Specify email settings

In [Email Settings](#), set up email on a system-wide level so that

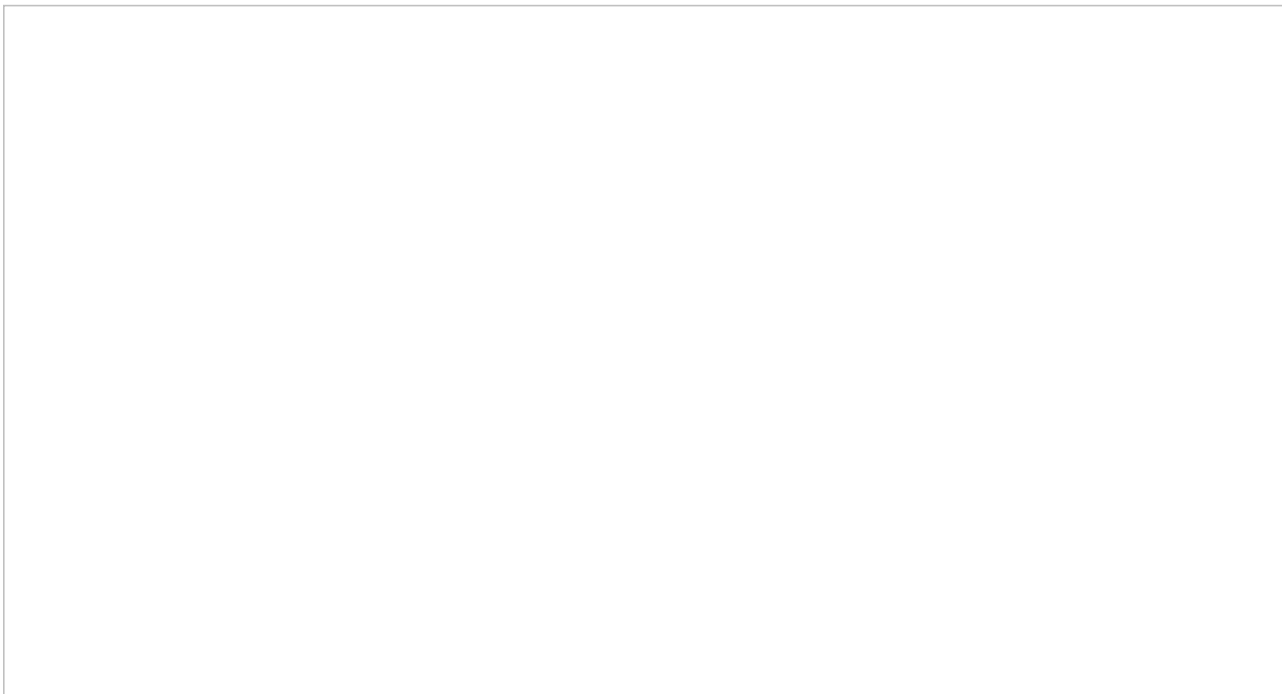
- Users have a standardized header and footer for email messages
- Users can send and receive email messages from Agent Desktop
- Standardized “reset password” emails are automatically sent to forgetful users
- Chat transcript delivery emails are customized for your contact center



Update email settings for all users

Step 6: Configure voicemail

Enable [voicemail](#) for your contact center, and create a standardized voicemail notification email that will be sent to users when they have new voicemail messages.



Update voicemail settings

Step 7: Configure audio for pre-recorded messages

1. Prepare and upload custom [audio treatments](#) for service queues, notifications, incoming calls, and more.

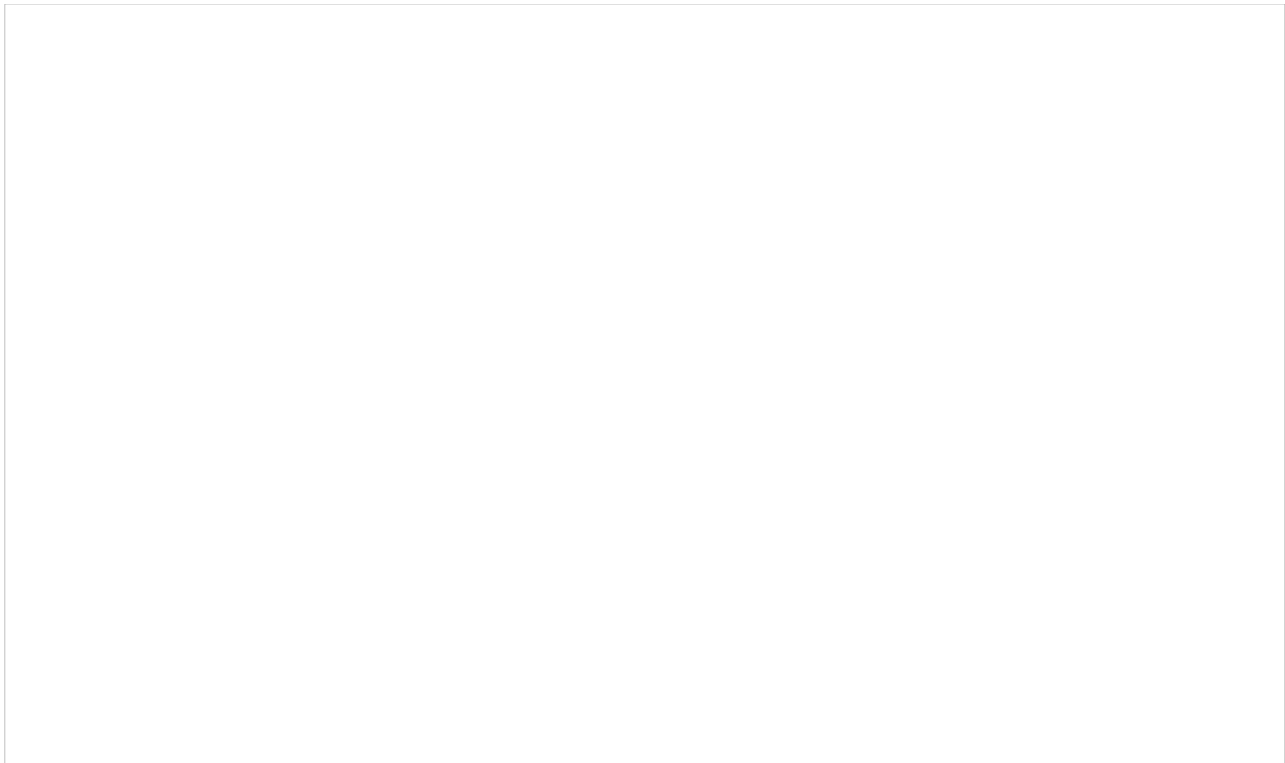


Audio Treatments settings

2. Create shared [voice segments](#), externally defined voice messages that can be used in announcements, prompts, greetings, and so forth.
3. Record or upload a default [voicemail](#) greeting, which will be the standard greeting for all users unless they upload their own.

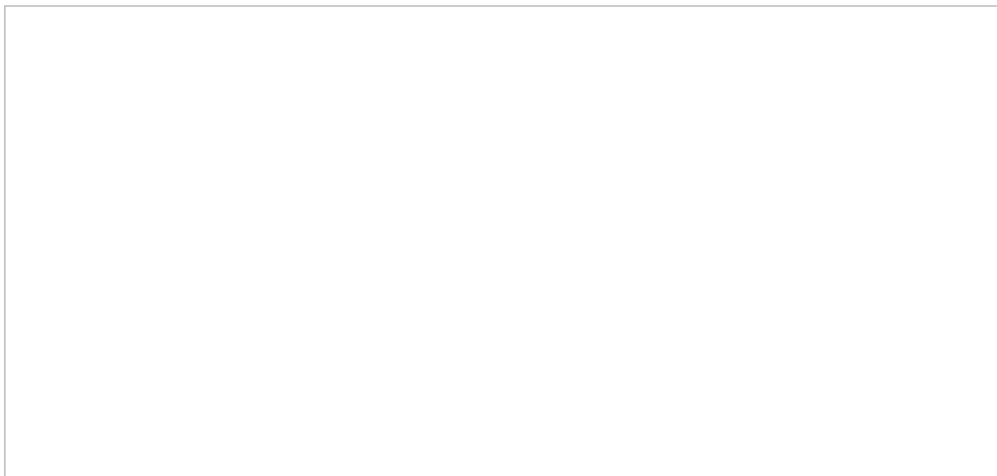
Step 8: Specify call recording settings and grading categories

1. In [Call Recording and Monitoring](#), specify the desired percentage of recorded calls



Call Recording and Monitoring settings

2. If necessary, go to [Grading Categories](#) and change the default quality assessment categories



Update grading categories

Step 9: Define operational schedules of your contact center

Specify your contact center's [calendars](#) and [hours of operation](#).



It's possible to have many saved calendars for your contact center

This wraps up your initial configuration tasks. Be sure to read Bright Pattern's service configuration quickstarts, which will help you to set up contact center services, such as voice, chat, and email.

Service Configuration Quickstarts

For configuration steps specific to different types of services, follow these links:

- [Inbound Voice and Chat Services](#)
- [Outbound Campaigns](#)
- [Email Services](#)