5.3 Privileges

Bright Pattern Documentation

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How to Send SMS Messages

Depending on the service configuration and your personal permissions, you may be able to send text messages via the Short Message Service (SMS) to customers who use mobile phones. This capability can be useful when you need to give your customers information that is better communicated as text (e.g., a confirmation number, mailing address, or web link).

Text messages can be sent at any time: when you are on the phone with the mobile customer, while performing the related after-call work, and after you have finished processing of the call. If the customer replies to your text, the system will deliver this message to you, associate with your original message, and present it to you in the form of a chat session.

Texting While in *Busy* or *After Call Work* State

To send an SMS message to a customer while handling the customer's service call (i.e., while you are in the *[Busy](#)* or *[After Call Work](#)* state), follow these steps:

1. Make sure the service associated with this call supports SMS communications; if this is the case, the **Send SMS** icon [ ] will be displayed next to the customer's number in the *Contact Info Panel*.
2. If necessary, confirm with the customer that the customer's phone can receive SMS messages.
3. Click the **Send SMS** icon.
4. Type the desired message in the **Text Input Field**.
5. You can use the **Pre-defined text message** icon [ ] to enter a message from your predefined text message set. For more information about predefined messages, see section [How to Create and Edit Chat Responses](#). Note that there is a limit for the number of characters in one SMS message. The limit (160 characters) and the current number of characters already entered are displayed below the text input field.
6. When the message is ready, press **Enter** or click **Send SMS** icon below [ ]. The message will be sent to the customer and will appear with a timestamp in the transcript area above the **Text Input Field**. When the system confirms message transmission with the carrier, the status of the message will be displayed as **Delivered**.
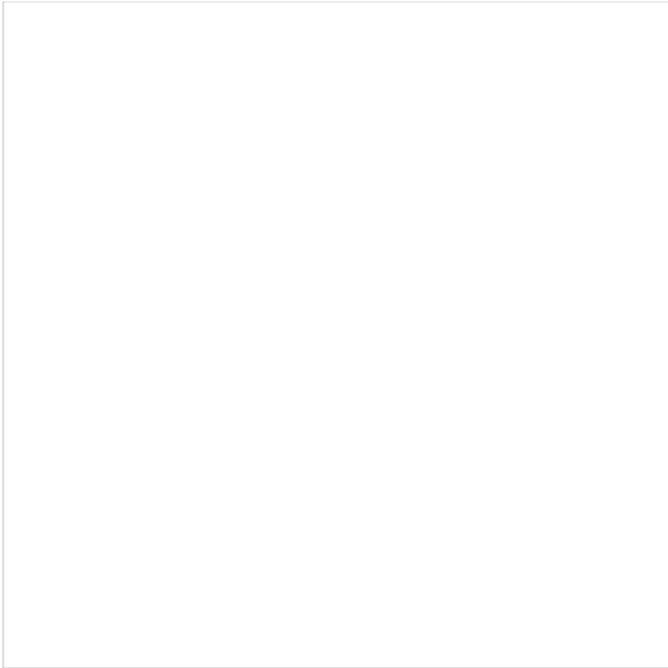
SMS text input field

If the customer replies to your message, the customer's message will appear in the transcript area highlighted in a different color.

You can continue exchanging SMS messages in this manner for as long as necessary. All such messages will be presented to you via transcript as part of the same conversation. Note that such exchange can extend beyond the call and even beyond your current login session.

When you know that the message exchange is over, click the **End Chat** button. If the customer continues to send SMS messages to you after you end the session, those messages will be ignored.

Texting While in *Ready* or *Not Ready* State

To send an SMS message to a customer while in *Ready* or *Not Ready* state follow these steps:

1. Select the service associated with this SMS message. See section How to Make an Outbound Call for more information about selecting services.
2. If the selected service is configured to support SMS messages, the **Send SMS** button will be displayed next to the **Number Input Field**, adjacent to the **Call** button.
3. In the **Number Input Field**, enter the customer's phone number. Make sure this is a mobile number.
4. Click the **Send SMS** button. The **Contact Info Panel** will display an active chat session with the entered number and the **Text Input Field** at the bottom.
5. Follow steps 3 to 6 of the process of sending an SMS message to a customer while handling his service call (see section "Texting While in *Busy* or *After Call Work* State").

Note: Depending on you contact center configuration, your customers may also be able to initiate a contact with you via SMS. For you, as an agent, such SMS messages will be presented in the same way as if they were regular incoming service chat requests. For more information, see section Handling Service Chats.

Call Recordings

Interaction records that are associated with call recordings are displayed with an audio icon. By clicking the icon, you can listen to a call recording and review any agent-provided notes associated with the call. Call recordings are useful for supervisors, for example, who may wish to review agent calls, evaluate agent performance, and save agent ratings.

Recording playback and grading

Listening to Call Recordings

To listen to a call recording, proceed through the following steps.

Step 1: Click [ ] and play the recording.

- The audio icon appears next to the corresponding interaction record. The *Review Call Recording* page will open with standard audio controls.

- Note that Depending on the type of media player used, the audio controls may appear only when you hover over the *Conversation recording* area. When using the *Review Call Recording* function for the first time in your browser, you may need to install the media player plug-in (extension). Also, depending on the internet security settings of your browser application, you may need to confirm your permission to use the media player on this page.

- If the agent entered a disposition or provided any free-form notes for this call, those items will be displayed on the *Review Call Recording* page as well.

- Click the play button to listen to the recording.

Step 2: Grade agent performance and comment.

If any categories for agent performance evaluation have been defined in your contact center configuration, you can grade the agent performance during the selected call on a scale of one to nine in any of those categories. You can also enter some free-form comments about this call recording.

Click the **Rate** button to save the data you have entered. Your grades and comments for this call recording will be stored and made available to other users who may subsequently review this call record.

Note that the same call recording is provided for all call segments, but you can grade performance of each agent who handled the call separately. Use the **next** and **previous** buttons to navigate between segments. Absence of any call grading categories on the *Review Call Recording* page for a particular call segment means that during that segment the call was connected to an IVR application.

Step 3: Save recordings and associated grades/notes.

- To download the grades, reviewer's notes, and the recording to your computer, click **Save As**.

- To share a link to the call recording with other reviewers, click **Copy link to share**. The link to this page will be copied to the clipboard. You can then paste this link to an email or text message to other people in your organization.

Note that in order to access the recording these people must have [privilege](#) *Listen to call recordings and chat transcripts*.

1. REDIRECT [5.3:Agent-guide/Tutorials/Cases/HowtoMaskSensitiveData](#)

1. REDIRECT [5.3:Agent-guide/Tutorials/Calls/HowtoUsetheDirectory](#)

1. REDIRECT [5.3:Agent-guide/Tutorials/Cases/HowtoSendaFollow-upOutboundEmail](#)

1. REDIRECT [#topic_agent-guide/tutorials/chatcenter/howtouseinternalchat](#)

1. REDIRECT [5.3:Agent-guide/Tutorials/Calls/HowtoRecordaCall](#)

1. REDIRECT [5.3:Agent-guide/Tutorials/Calls/HowtoStoporPauseCallRecording](#)

1. REDIRECT [5.3:Agent-guide/Tutorials/Calls/ConsultationsandTransfers](#)

1. REDIRECT [5.3:Agent-guide/Tutorials/Calendar/HowtoScheduleanEvent](#)

About

Bright Pattern Contact Center omnichannel cloud call center software integrates with Oracle Service Cloud (formerly called Oracle RightNow) applications to help you drive agent productivity, improve customer experience, and reduce agent load.

Similar to Bright Pattern software, Oracle Service Cloud applications offer talk services, analysis, and reporting. Oracle Service Cloud interfaces directly with Bright Pattern, so that contact centers using the cloud CRM can take advantage of Bright Pattern's features without losing their existing data records and contacts.

This Bright Pattern Contact Center *Oracle Service Cloud Integration Guide* provides instructions for setting up your Bright Pattern Contact Center to function in an integrated manner with your Oracle Service Cloud applications. In addition, this guide offers detailed descriptions of Oracle Service Cloud integration features, including Oracle Service Cloud data-driven interaction routing, the integrated Agent Desktop, screen-pop, activity history, and click-to-call functions.

Features and Benefits

Oracle Service Cloud integration provides everything you need to drive agent productivity, improve customer experience, and reduce agent load.

Drive Agent Productivity

Oracle Service Cloud integration provides an easy-to-use Agent Desktop user interface designed to reduce agent training requirements. Seamless integration with Oracle Service Cloud customer relationship management (CRM) applications means that agents and supervisors are able to use the same Oracle Service Cloud contacts and tools with which they are familiar, through Bright Pattern's efficient, streamlined user interface.

Helpful features:

- One-click dialing with click-to-call capability saves time for both agents and administrators. Because it works out of the box, there is no need to modify forms before getting started.
- Screen-pop functionality saves time as well--customer data is "popped" to the agent's screen, showing all Oracle Service Cloud data associated with the customer. The agent does not need to search the customer's records to learn more about the case or ticket.
- Activity history is displayed front and center, showing agents the context of past conversations with customers. Agents can resolve calls faster when such interaction history and call history is saved, complete with notes, dispositions, and call recordings.
- The integrated Agent Desktop user interface works with USB headsets via a built-in softphone or through any PSTN phone number. Both options can be used by virtual agents working from home.
- Supervisors can track agent performance with real-time supervision tools and historical reports.
- Supervisors can also inform teams about their productivity in real-time with wallboard displays.

Improve Customer Experience

Oracle Service Cloud customer data is pushed to the integrated Agent Desktop, enabling customers to be identified automatically according to their ticket number or any other data saved in Oracle Service Cloud applications. Moreover, customers keep their place in queue, ensuring that priority customers are identified as such and are served faster.

Built-in call and screen recording, monitoring, and grading quality management tools ensure maximum service quality. For example, a customer does not have to repeat information on transfer because the information follows the call through transfers and is saved to the activity history.

To ensure the best service quality possible, agents and supervisors can routinely assess customer satisfaction by using built-in post-transactional surveys attached to both service and agent performance reports.

Reduce Agent Load with Automation

Integration with Bright Pattern also provides access to Bright Pattern scenarios, which automate frequent requests into self-service using Interactive Voice Response (IVR) technology. With call scenarios, customers are prompted to provide information for their case, and their information is used to direct their case to the appropriate agent, voicemail box, or service queue. Administrators can use call scenarios to design custom prompts for any service, while agents can use call scenarios to search, create, and update data in Oracle Service Cloud.

Reduced agent load also means fewer abandoned calls and added convenience for customers. Virtual queuing functionality allows customers to receive a call back at a later time, so they are not waiting on hold endlessly during peak call times. Abandoned calls can be captured in a preview campaign, and customers can be reached later during less busy hours. Customers also have the option to leave a voicemail and receive a call back later.

Oracle Service Cloud IVR example

Purpose

Bright Pattern Contact Center omnichannel cloud call center software integrates with ServiceNow IT service management software to enable seamless customer conversations using voice, messaging, email, and video.

The Bright Pattern Contact Center *ServiceNow Integration Guide* provides instructions for setting up your Bright Pattern Contact Center to function in an integrated manner with your ServiceNow applications.

About

Bright Pattern Contact Center omnichannel cloud call center software integrates with Zendesk applications to help you manage increasing contact volume, provide better service to your customers, and increase agent productivity and performance.

Similar to Bright Pattern software, Zendesk applications offer live chat, messaging, talk services, and analysis and reporting. Zendesk interfaces directly with Bright Pattern, so that contact centers using Zendesk can take advantage of Bright Pattern's features without losing their existing data records and contacts.

This Bright Pattern Contact Center *[Zendesk Integration Guide](#)* provides detailed descriptions of Zendesk integration features, as well as instructions for setting up your Bright Pattern Contact Center to function in an integrated manner with your Zendesk applications.

Features and Benefits

Zendesk integration provides everything you need to implement a model Zendesk Call Center, including the following:

- Zendesk phone integration
- Zendesk chat
- Zendesk SMS

- Integrated Agent Desktop

[Zendesk integration icons](#)

Zendesk Phone Integration

The integrated phone system is powered by Zendesk Interactive Voice Response (IVR) technology for customer recognition and self-service, voicemail tickets, and more. Zendesk IVR automates common or frequently performed telephone transactions by means of a computer interacting with a person by playing prompts and responding to touch-tone or voice input.

When integrated with Bright Pattern Contact Center software, your business can keep running even outside of normal hours of operation. For example, Zendesk phone integration allows you to do the following, and more:

- Reduce staffing requirements with multimedia interaction queuing, which spreads load peaks.
- Automate frequent requests with multimedia interaction scenarios used to provide self-service.
- Provide after-hours automated answering service, and create tickets from voicemail.

Zendesk Chat and SMS

Rich contact channels and powerful tools such as Zendesk chat and Zendesk SMS make it easier for customers to reach you by offering service over rich web chat, SMS, social messengers, and mobile apps.

Zendesk chat provides push routing, multiple concurrent chats on agent, Facebook Messenger, SMS and other messaging, and customer identification. Likewise, Zendesk SMS lets you handle customer inquiries over SMS as chat, send reference information via SMS on a call, process post-call surveys via SMS integrated with Zendesk, and more.

[Zendesk integration scenario]

Customers and service providers benefit in so many ways:

- Customers can text Customer Support from a public place, such as a train or a doctor's waiting room, privately, making use of otherwise lost time.
- A customer doesn't have to wait on the phone when contacting through SMS or mobile apps--they can go about their business and get alerted when an agent is available.
- Thanks to SMS messaging on Agent Desktop, customers don't have to write things down on a call.
- Based on the data in Zendesk, customers are recognized automatically.
- Customers can be serviced in priority order, with priority derived from the data in Zendesk.
- Service quality is better managed with call and interaction recording and grading.
- Customers don't have to repeat their information on transfer, as the information on screen always follows the interaction.

Integrated Agent Desktop

The integrated Agent Desktop user interface helps to increase agent productivity. Featuring a built-in softphone, screen pop, click to call, activity history, and a convenient user interface, it is optimized to minimize clutter while keeping functions at close reach. Conveniently, it displays only the controls and information needed at each point of work.

[Zendesk Integration Agent Desktop](#)

With Agent Desktop integrated with Zendesk, you can work more efficiently:

- Drive tickets to resolution faster with internal chat between agents and supervisors.
- Dispatch repetitive tasks quickly with knowledge base, canned responses for chat, and click-to-play personal pre-recorded messages.
- Recognize and prioritize customers and screen pop tickets with multi-media interaction scenarios driving customer identification
- Dial customers' phones with a single click using built-in software telephone featuring click-to-call.
- Have context of past conversations at the agent's fingertips with call activity history saved in ticket log, including call recordings and voicemails.
- Gain insights on agent performance with real-time operations displays and historical interaction reports.

Use the Bright Pattern Contact Center *[Zendesk Integration Guide](#)* to learn more about and take advantage of the many benefits of Zendesk integration.

Evaluation Forms

Evaluation forms are used to evaluate and grade interactions between agents and customers. Forms are filled out in [Eval Console](#), located in the Agent Desktop application, section Quality Management; forms are [defined per service type](#).

Evaluation forms are created and edited in the Evaluation Form Editor application; forms consist of evaluation [areas](#) that may be [shared across forms](#) and each area contains [questions](#). Evaluation forms are filled out by users with [Quality Management privileges](#) and the results of completed forms are available in [QM Pro reports](#).

Evaluation forms are associated with the quality management features of Bright Pattern Contact Center software and are different from the forms configured in the [Form Builder](#) application and the Survey Form Editor application. Quality management features are enabled per contact center. For more information, contact your service provider.

Articles

- [Evaluation Forms Overview](#)
- [Default Forms](#)
- [Evaluation Areas](#)
- [Evaluation Questions](#)
- [Configuring Evaluation Forms](#)
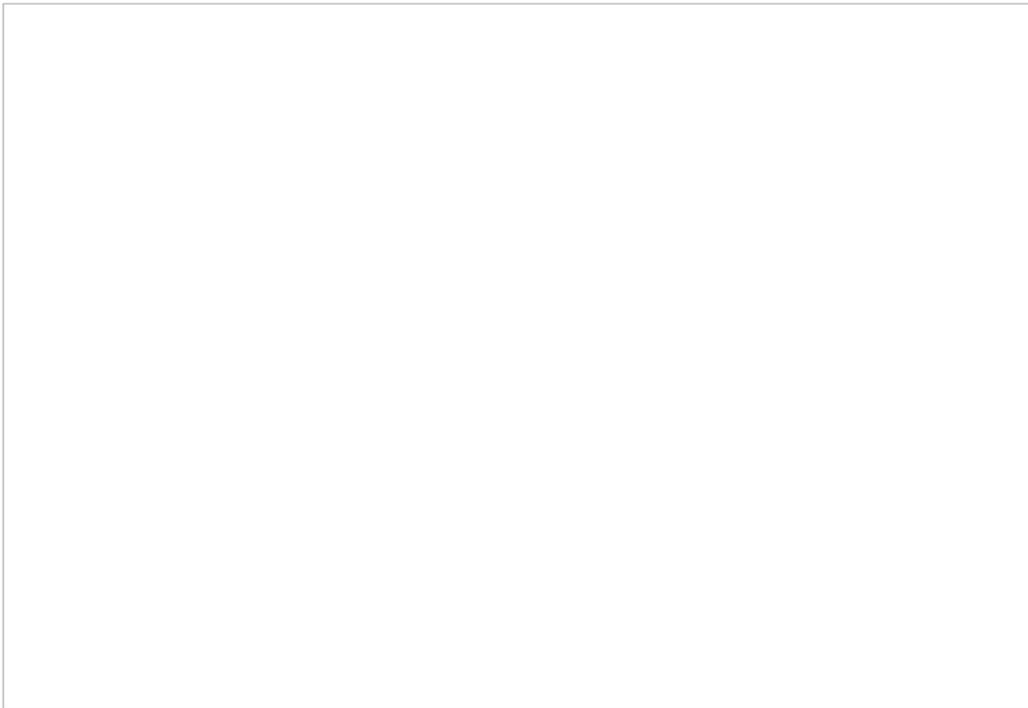
A default form seen in the Evaluation Form Editor application

1. REDIRECT [5.3:Contact-center-administrator-guide/UsersandTeams/Roles](#)

1. REDIRECT [5.3:Contact-center-administrator-guide/Security/SecurityPolicy](#)

1. REDIRECT [5.3:Contact-center-administrator-guide/Security/SystemAccessRestrictions](#)

1. REDIRECT [5.3:Contact-center-administrator-guide/Security/EncryptionKeyManagement](#)

1. REDIRECT [5.3:Contact-center-administrator-guide/Reporting/ReportTemplates](#)

Scheduled Reports

Bright Pattern Contact Center supports automatic generation of reports and their delivery to specified destinations as email attachments and/or via FTP.

To define report generation schedules and specify the delivery methods and destinations, select the **Scheduled Reports** option from the *Reporting* menu.

Reporting > Scheduled Reports

Select the type of report that will be generated. For more information see sections [Aggregate Reports](#) and [Detailed Reports](#) of the *Bright Pattern Contact Center Reporting Reference Guide*.

After selecting a report name from the list of reports, click **Schedule this report for distribution**.

Note: Bright Pattern Contact Center provides several reports for use with the scheduling functions of the Aspect Workforce Management application. Names of these reports begin with *WFM*. For complete specifications of these reports, please refer to the Aspect Workforce Management documentation. These reports should be scheduled for selected agent teams with the *Time frame* parameter set to *Today*, and the *Recurrence* parameter set to *Hourly*. See the description of the *Parameters* tab below for more information.

Screen Properties

The *Scheduled Reports* screen properties are organized into three tabs (Parameters, Email Delivery, and FTP Delivery), which are described as follows.

Parameters tab

Enabled

Select the *Enabled* checkbox to enable report generation and delivery according to the specified schedule.

Recurrence

Select the recurrence pattern (Hourly, Daily, Weekly, Monthly). Each pattern has a specific set of parameters that are explained below.

Hourly recurrence is typically used for periodic automated data feed into systems that process statistical data, such as workforce management applications. Note that an hourly report runs when data aggregated for the full previous hour becomes available; thus, hourly reports will always be generated with some delay.

Run at

This setting is available for all but the *Hourly* recurrence pattern. It specifies the time of day when the given report will be generated.

Repeat every

This setting is available only for the *Hourly* and *Daily* recurrence patterns and should normally be used with the *Time frame* parameter set to *Today*. It specifies how often the given report will be generated. For the *Hourly* recurrence, it is set for continuous updates with the period of one hour, a half-hour, or 15 minutes. For the *Daily* recurrence, it is used to generate reports with the desired frequency between the times specified by settings *Run at* and *Repeat until*.

To generate the given report once, select **Run once**.

Repeat until

This setting is available only for the *Daily* recurrence pattern. It specifies until what time periodic updates for the given report shall be generated. It should normally be used with the *Time frame* parameter set to *Today*.

Days of the week

These checkbox settings are available only for the *Weekly* recurrence pattern. Use them to specify the day(s) of the week when the given report will be generated.

Run on

This setting is available only for the *Monthly* recurrence pattern. Use it to specify the day of the month when the given report will be generated.

Time frame

Select the desired reporting time frame. For example, if it is your practice to start your day with reviewing results of the previous day, select the *Yesterday* time frame, set recurrence to *Daily*, set *Run at* to *3:00 AM*, and set *Repeat every* to *Run once*.

To request a report for a specific time interval within a day, select a day time frame (*Today* and *Yesterday*) and use the *From* and *To* fields to specify the desired interval. This may be convenient if you need to get separate reports for different contact center shifts. To get a report for a shift that begins before, and ends after, midnight, select time frame *Yesterday*, and set the desired start time in the *From* field and the desired end time in the *To* field (you will see *+1 day* next to the hours as an indicator that it is an overnight shift).

To request a multi-day report of an arbitrary duration, set the time frame to *Last N days* and specify the desired number of days. Note that this option lets you obtain a weekly report on any 7-day cycle, as opposed to a calendar week.

Time interval

This setting is available only for a subset of the reports that compare metrics over time (i.e., over a number of subintervals within the specified *Time frame*). For example, a daily Disposition in Time report can be requested with an hourly or 30-minute breakdown. Use this setting to select the desired subinterval length.

Agents

For agent report templates, you can select the agent(s) that will be included in the generated reports.

Teams

For team report templates, you can select the team(s) that will be included in the generated reports.

Scenarios

For scenario report templates, you can select the scenario(s) that will be included in the generated reports.

Services

For service report templates, you can select the service(s) that will be included in the generated reports.

Email Delivery tab

Deliver report via email

Select this checkbox if the reports generated according to this schedule shall be delivered as email attachments.

Note that the corresponding SMTP settings must be configured on the [Email Settings > SMTP Configuration](#) page.

Sender display name

Specify the name that will appear in the *From* field of the emails with report attachments.

Sender email address

Specify the email address that will appear in the *From* field of the emails with report attachments.

Subject

Specify the text that will appear in the *Subject* field of the emails with report attachments.

Message

Specify the text that will appear in the body of the emails with report attachments.

Format

Select the format of the report attachment (i.e., PDF, Excel, CSV, Text).

Recipients

Click **edit** to select one or more email recipients. Note that a report recipient must be registered as a user in the contact center configuration and must have an email address specified in his profile. See section *Users* for more information.

FTP Delivery tab
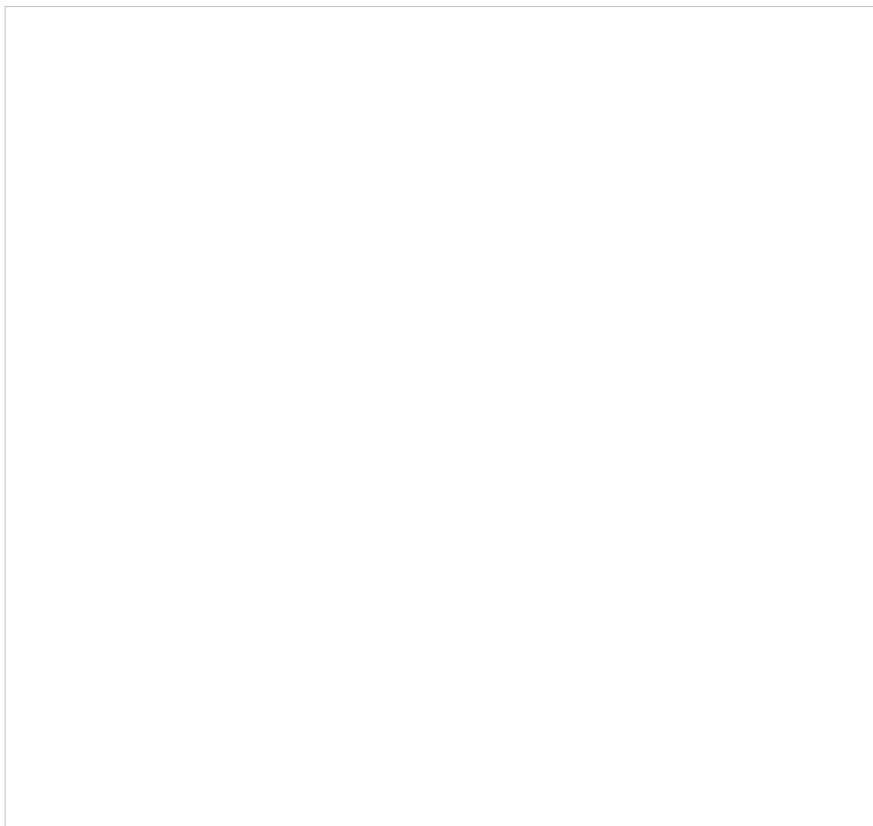
FTP Delivery tab properties

Deliver report via FTP/SFTP

Select this checkbox if the reports generated according to this schedule shall be delivered via a file transfer protocol.

Format

Select the format of the report file: PDF, Excel, CSV, or text.

Transport Protocol

Select the type (i.e., FTP or SFTP) of the transfer protocol to be used for report file delivery.

FTP/SFTP Server hostname

Enter the *FTP/SFTP Server hostname* (e.g., "cust.anyftp.com").

Destination folder and file name

Specify the address of the destination folder and file name (e.g., *50Reports/Report_%d_%t.csv* where *50Reports* is the destination folder and *Report_%d_%t.csv* is the file name).

Note that in your scheduled report, you can add date (*%d*) and time (*%t*) placeholders to the specified filename. For example, specifying filename *Report_%d_%t.csv* results in a scheduled report with a filename such as *Report_20180521_113000* where *20180521* represents the date "May 21, 2018" and *113000* represents the time "11:30:00" that the report was generated.

FTP username

Specify the FTP username (e.g., "1250bayhill@gmail.com").

FTP password

Specify the FTP password.

1. REDIRECT 5.3:Contact-center-administrator-guide/Reporting/ReportingSettings

General Information About Campaign Operation

As a campaign operator, you can use the Agent Desktop application to view [real-time metrics for the campaigns](#) that are assigned to you.

In addition, you can use Agent Desktop to do the following:

- [Start and stop](#) selected campaigns
- [View metrics for lists](#) associated with selected campaigns
- [Enable and disable lists](#) associated with selected campaigns
- [View metrics for agent teams](#) participating in a selected campaign
- [Add and remove campaign teams](#)

Those metrics and controls are displayed in the right pane of your Agent Desktop when you select the *Campaigns* option from the *Active Communications List*.

Note that in order to monitor and control a particular campaign, you must have the default *Campaign Operator* role or a custom role with privilege *Control campaign operations*, and you should be assigned as an operator for this campaign.
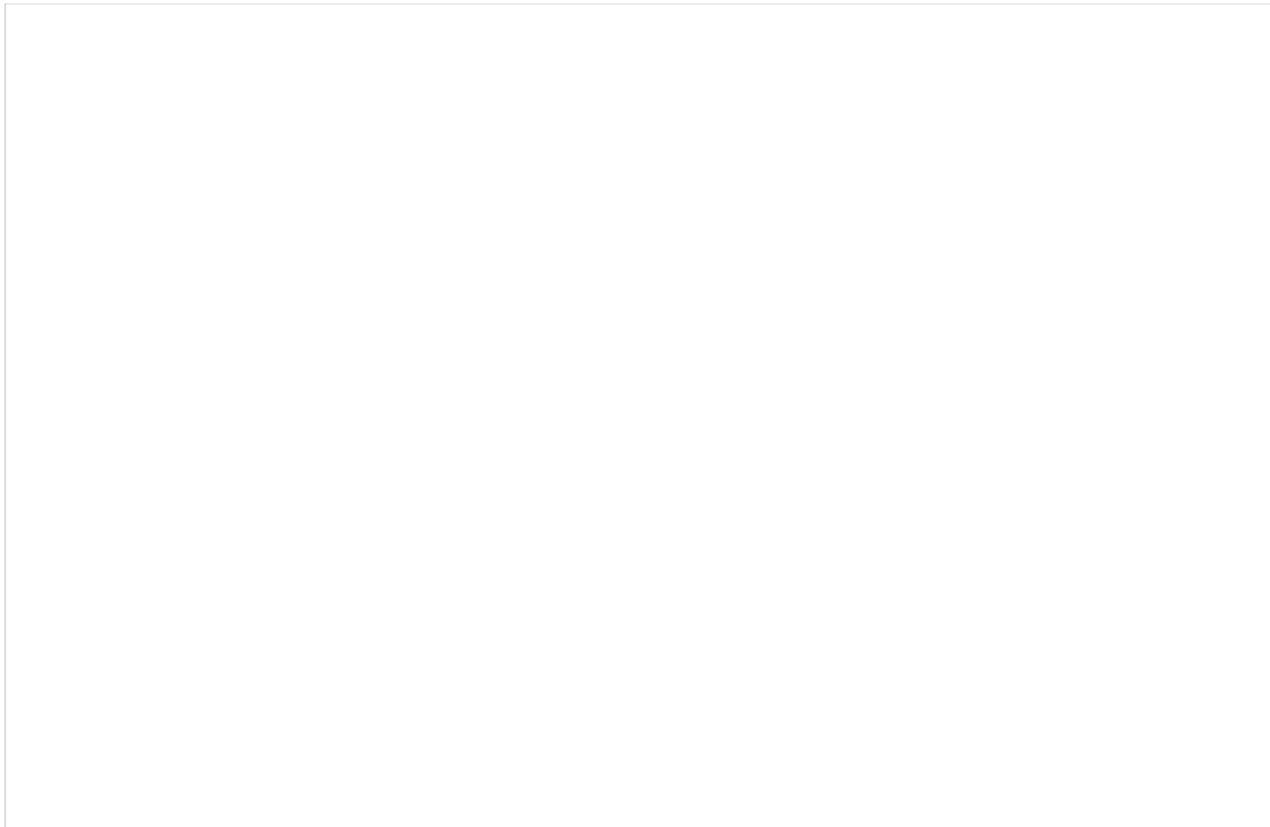
Campaign operations view

For general information about viewing real-time metrics, customizing metrics views, restoring the default views, and obtaining metric descriptions, see the following topics of section Viewing Real-Time Metrics:

- [General Information About Metric Viewing](#)
- [Understanding Real-Time Metrics](#)
- [Customization of Metrics Views](#)

For how-to articles related to campaigns, see the following articles in *Tutorials for Supervisors*:

- [How to Start and Stop Campaigns](#)
- [How to Enable and Disable Lists within a Campaign](#)
- [How to Add and Remove Campaign Teams](#)

1. REDIRECT [5.3:Contact-center-administrator-guide/CallCenterConfiguration/KnowledgeBase](#)

1. REDIRECT [5.3:Contact-center-administrator-guide/ServicesandCampaigns/AssignmentsTab](#)

1. REDIRECT [5.3:Contact-center-administrator-guide/ServicesandCampaigns/AssignmentsTab](#)

Lists

Lists contain destination data for automated outbound dialing. Each list record provides information about a single destination, and typically includes customer's name, at least one telephone number, and other information specific to the dialing purpose. For example, lists used in a satisfaction survey campaign may include information about products purchased by the customers. Lists are used in outbound and blended services as discussed in section [Services and Campaigns - Lists Tab](#).

List data is deleted from the calling list database automatically when the

- corresponding list object is deleted from configuration
- list is updated with new content via periodic import with the [update policy](#) set to *replace list data*

To work with lists, select the **Lists** option from the root menu. To import and configure a new list, click the button with the "+" sign. A list import wizard will open.

List import wizard

List Import

The list import wizard screens and properties are described as follows.

List Type screen

List type screen

Select list type

Select the method that will be used to import data to this list: a file or Salesforce.com query. For the latter, you must have a [Salesforce.com integration account](#) configured in your system.

For detailed instructions on importing data from a Salesforce.com application see section[Importing Calling Lists and Exporting Campaign Results](#) of the *Salesforce.com Integration Guide*.

Name and Source screen

Name and Source screen

Data source

Data source is the source of data for this list. To upload a file from a local source, select**Upload**, click **Browse**, and select the data file. You can use [results of previous campaigns,](#) filtered by disposition if necessary, as the source of your list data.

To obtain data from an external source, select the transfer protocol (*FTP* or *SFTP*), and specify the address (URL), *Username*, and *Password*.

Note that only plain text list files (.CSV or fixed width) are supported as sources for list data. This setting is specified for list type *File* only.

List name

The list name is mandatory and must be unique within the contact center. The name of the selected data source is offered as the default name.

List format

If you want the format of a list to be based on the format of one of the previously imported lists, select the desired *list format* from the drop-down menu. Using an existing list format can save you time while going through the subsequent import steps, especially the *Fields* wizard screen.

If you need to review the desired format before assigning it, close the wizard, locate the desired format in the *Format* column of the list view, select the corresponding list, and click the**view** link in the **Properties** tab.

Note that if you select an existing list format but decide to introduce some changes for the imported list (e.g., change some field names), then upon completion of the wizard, you will be prompted to save these changes as a new format.

If you wish to create a new format using the layout of the imported list, select**Create new format**. This setting is specified for list type **File** only.

Salesforce.com integration account

The [Salesforce.com integration account](#) is what will be used to obtain Salesforce.com data for this list. This setting is specified for list type Salesforce.com only.

SOQL query to select object for list

Use this field to specify the query for selecting Salesforce.com records for this calling list. The query must be written in the [Salesforce Object Query Language (SOQL)](#). Note that the records must contain object identifiers and have at least one phone number.

This setting is specified for list type Salesforce.com only. Note that there is a 30 second timeout on the Bright Pattern Contact Center side to begin receiving data from SFDC after the SOQL query is submitted.

Format Type screen (for list type *File* only)
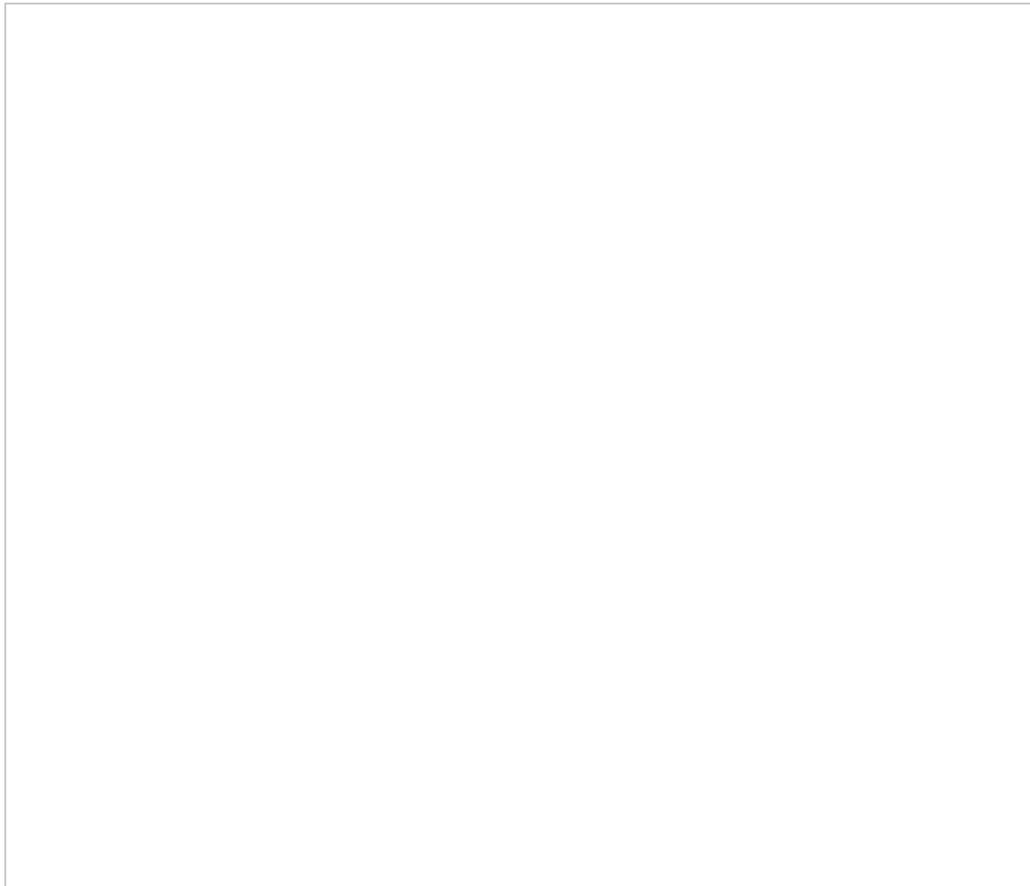
Format Type screen

Delimited

Select *Delimited* if a character, such as comma or tab, separates each field in the imported data

First line contains field names

Select this checkbox if the first line of the imported data appears to contain column headings. Field names are case insensitive starting from version 3.13. This means field names that differ in case only refer to the same field.

Fixed width

Select this option if fields of the imported data appear to be aligned in columns with spaces between each field.

Input file encoding

The *Input file encoding* option lets you select the encoding used by the source file. Initially, the UTF-8 encoding is assumed by default. If you select another encoding during a list import, the selected encoding will become the new default for subsequent list imports.

Format Options screen (for list type *File* only)
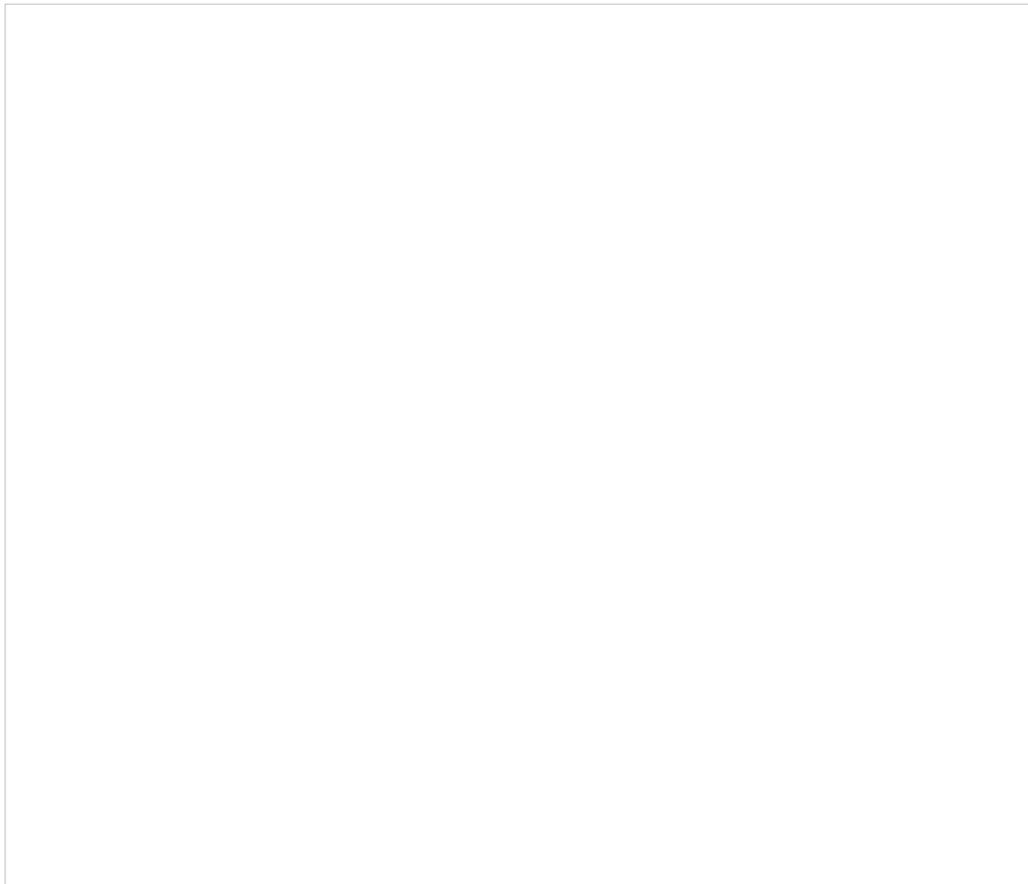
Format Options screen

Delimiter

Select the character that is used to separate each field in the imported data. If the delimiting character is anything other than the comma, tab, or semicolon, use the **Custom** option to specify the character. When the correct delimiter is selected, the preview should show the imported data arranged as a table.

Fields screen

Fields screen

Do not import field (skip)

This field indicates whether the selected field is to be imported. Select this checkbox if the data in the selected field is not essential for any contact center operations (i.e., will not be used for dialing, analyzed in a scenario, or displayed for agents) and does not need to appear in [campaign results](#).

Type

Specify the *type* of data that the selected field contains. If the type of data is anything other than the data types predefined in the drop-down menu, select *Other*. Note that at least one field of the imported list must have type *Phone*.

If the first row of the imported data contains column names, the wizard will try to automatically set field types according to matching column names (e.g., a column titled *State* will be set to field type *State*). You should review all name-type pairs to make sure the mapping is correct.

Possible uses of the available field types are described as follows.

Account

Account can be used for a field that contains a customer identifier. If defined, the value from this field will be stored as part of the history of all calls initiated by the corresponding calling record and can be used as a selection criterion in interaction record search. Unique account numbers can also be used as calling record keys (see below). A list can have only one field of this type.

Agent Login ID

Agent Login ID can be used to assign list records to specific agents. This may be useful, for example, for proactive contacts within established business relationships where clients might expect/prefer to be contacted by business representatives that they are familiar with. Note that such personal record assignments are used in preview campaigns only. When a list with records assigned to specific agents is used in a predictive, progressive, or automatic/IVR campaign, all such assignments will be ignored.

Caller ID

If calling records contain numbers that should be displayed as caller IDs when dialing corresponding records during campaigns, use the field type *Caller ID* for the field that contains these numbers. Use of these numbers as Caller IDs for a particular campaign is enabled by the campaign's Caller ID settings (option *From list field of type "Caller ID", otherwise default*). Note that your service provider may or may not allow use of arbitrary caller ID numbers for your outgoing calls. If 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. When using this field to specify caller IDs for your campaign, be sure to check all legal requirements and restrictions for what can be sent as a caller ID in the jurisdictions where you operate.

Company

Company can be used when calling record contains a company name.

Date/Time

If the calling list is based on customers' callback requests (opt-in callback list), your local telemarketing regulations may require that such callbacks are made within a specific number of days. In this case, the imported list will typically have information about when the callback request was made. Use the field type *Date/Time* for this information. Fields of the *Date/Time* type cannot be used to set campaign quotas.

Date/Time - schedule call at

Date/Time - schedule call at can be used to provide, during list import, information about when this record needs to be called. It can be used to define the exact moment of time when this record needs to be attempted.

Note that the call will happen as close to the specified date and time as possible; the system will make the best attempt. Safe calling hours are not ignored. If the date and time are in the past at the time of list load, the field contents are ignored.

Encrypted data

Encrypted data can be used to store sensitive information that must be stored encrypted and only be presented in clear text to the agent who will be processing the record in case of a successful call attempt. Note that the encrypted data cannot be not automatically processed by the system, and thus, may not include any information used for campaign automation, such as phone numbers, zip codes, states, or any information that is used to set [campaign quotas](). If you do not see the **Encrypted data** field type, the data encryption function is not enabled for your contact center by the service provider.

First name

First name is the person's first name.

Integer

Integer is intended for fields with semantically numeric data (e.g., person's age or account balance) that may be used to set a [campaign quota]().

Last name

Last name is a person's last name.

Other

Other can be used for fields that do not fall into any specific field type uses outlined here.

Phone

Phone should be set for fields with phone numbers that may be dialed during a campaign. A list must contain at least one field of this type.

Postal code

Postal code is a person's postal code. This must be present if the *[Use safe calling hours option]()* is desired.

Priority

Priority can be used to indicate that the record shall be attempted as soon as possible relative to other records within the same list. This can be useful, for example, in order to give calling priority to the most recent web leads that tend to be most effective when followed up on immediately. A record will be treated as a prioritized record when its priority field is set to any value other than empty string, zero, "no", or "false". 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 can also be set to expire after a specified time period (see property *Priority expires after*).

State/Province

State/Province is a person's state/province. Either this field or the *Postal code* field must be present in the calling records in order to observe mandatory [State Calling Hours]().

Name

If the first line of the imported data contains column headings, these headings will be used as the default field names. Otherwise, default names *Field1*, *Field2*,..., *FieldN* will be assigned. Use this option to change the default field name if necessary. Field names are case-sensitive, which means that field names that differ in case only refer to the same field.

Required Field

Required Field indicates that the data in this field is required. If selected, the import process will not skip records that have no data in this field.

For all fields of the *Phone* type, this checkbox is preselected automatically. You can unselect it manually for any phone field that is optional. Remember, however, that at least one field of the imported list must have the type *Phone*.

For lists of the Salesforce.com type, field **ID** is preselected automatically and cannot be unselected.

Searchable Field

Searchable Field indicates this field may be searched for in the Agent Desktop application when associated with a [custom Activity History field](#) that is included in a [screenpop activity form](#). For more information, see section [Activity Forms](#).

The numbers are in the format for

This setting is displayed for the fields of type *Phone* only.

If all phone numbers in this field are within the USA and/or Canada, select **United States and Canada**. In this case, the numbers in this field will be processed according the following rules:

- If a number begins with "011", it will be kept as is.
- If a number begins with "1" and has eleven digits, it will be kept as is.
- If a number does not begin with "1" and has ten digits, "1" will be prepended.
- In any other case, the record will not be imported.

If some or all numbers in this field are from countries other than the USA or Canada, select **Other countries or multiple countries**. In this case, the numbers in this field will be processed according the following rules:

- If a number begins with "+", the leading "+" sign will be removed.
- In any other case, the number will be assumed to begin with a country code and also kept as is unless modified using the *Remove prefix* or *Default country code* settings.

Remove prefix

This setting is displayed for the fields of the type *Phone* only and can be used when the number format is set to *Other countries or multiple countries*. If phone numbers in this field contain a prefix that must be removed, specify this prefix here. Otherwise, this setting should be left blank.

Default country code

This setting is displayed for the fields of type *Phone* only and can be used when the number format is set to *Other countries or multiple countries*. By default, numbers in a field of type *Phone* are assumed to have country codes included. In this case, you can leave this field blank. Otherwise, specify the country code here; it will be automatically prepended to each number in the given field unless the number begins with "+".

Note that a country code must be specified for campaigns with any calling hour restrictions and for campaigns where numbers are checked against DNC lists of the following types: Area Code, Geographic (Postal), and Geographic (State/Province).

Time zone

This setting is displayed for the fields of *Date/Time* type only. By default, the time in this field is assumed to be specified for the time zone indicated in the [general settings of your contact center](#). You can use this setting to specify another the time zone for this field.

Date/Time format

This setting is displayed for the fields of *Date/Time* type only and allows you to select the format in which the date and time is specified in this field. If you cannot find a format that matches exactly the date/time pattern used in the imported list, use the editable field to specify this format manually, using the [Java SimpleDateFormat conventions](#).

Note that [campaign results](#) report timestamps of call attempts in the following format: **MM/dd/yyyy HH:mm:ss z Z**, where **z Z** is the time zone (e.g., **11/09/2015 13:59:57 PST -0800**).

Order of prioritized records

This setting is displayed for the fields of type *Priority* only and defines the order in which prioritized records received during list updates will be attempted.

Priority expires after

This setting is displayed for the fields of type *Priority* only and specifies the time period during which records with a non-empty value of this field will be considered a prioritized record. Upon expiration, priority of these records will be lowered to normal. If you do not wish the priority of a record to expire at all, set this field to 0.

## Key screen (for list type File only)
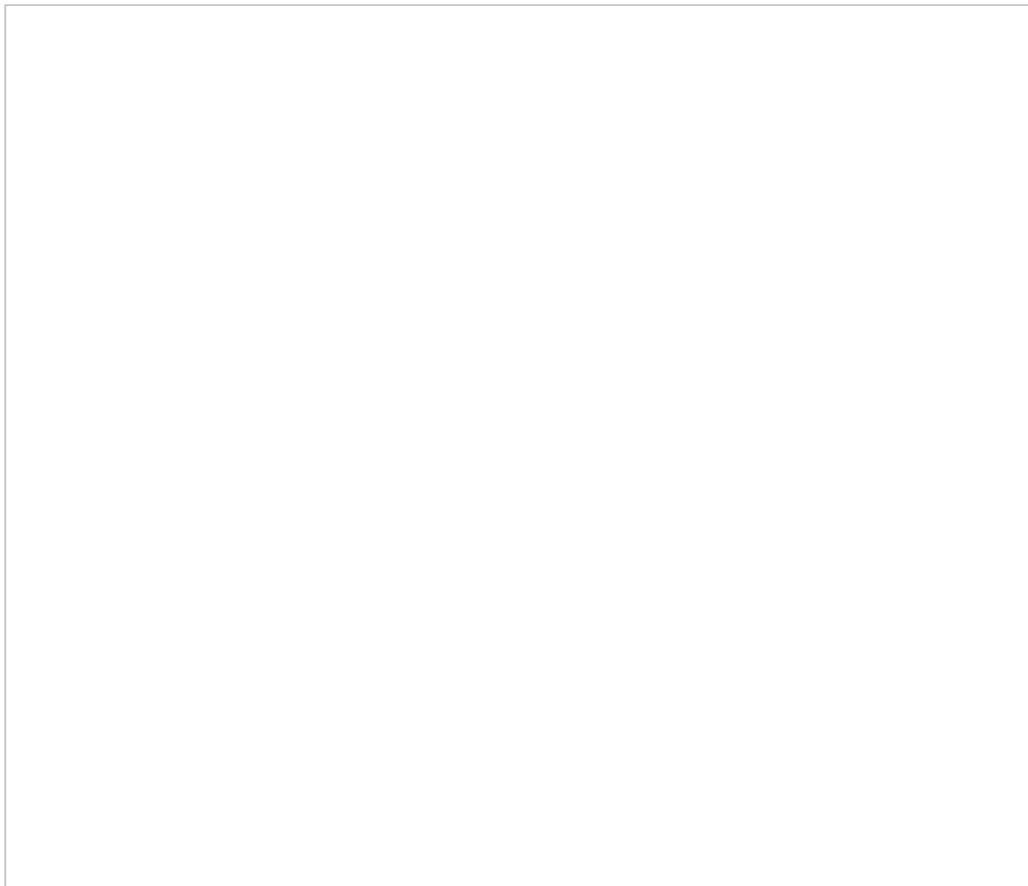
Key screen

Fields

This screen allows you to select a field, or a combination of fields, whose values will be used as keys (i.e., will uniquely identify records within the list). Only the fields that were marked as *Required* in the previous wizard step will appear as possible keys. Records with the same key values are considered duplicates, and only one of such duplicate records will appear in the imported list. Keys are also used to reference the campaign results to the original list records.

Save config only

Click this button, instead of clicking *Next*, if you wish to save only the list format (i.e., the configured field and key information without the actual data). The result will appear as a new list with zero records in the list view.

Import Complete screen
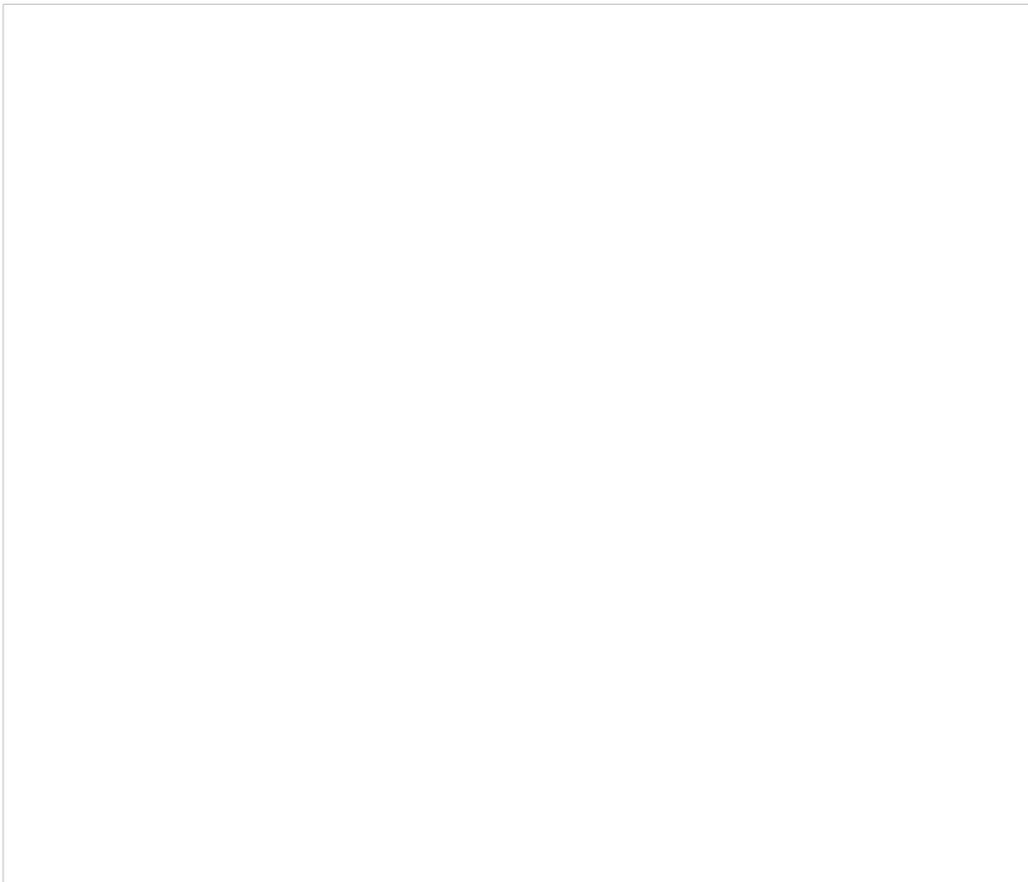
Import Complete screen

Import results

This screen provides statistics about the imported list, including the number of successfully imported records, as well as the numbers of records that have not been imported for various reasons.

Calling records that contain the same phone number in multiple fields of the *Phone* type will be successfully imported. The dialer will detect duplicate numbers while processing the list for use in a specific campaign and will only use the number in the first phone field while ignoring that number in all other phone fields of the same record. For example, if a calling record contains the same number in the field **Home Phone**, which happens to be the fourth field in the record, and in field **Mobile Phone**, which is the sixth field, the dialer will use this number according to the [calling hours](#) set for home phones. It will ignore this number when dialing mobile numbers (or when sending preview records to agents in case of a preview campaign).

Updating Lists

New lists imported via the list import wizard appear in the list view of Lists. You can update these lists manually or set up periodic automatic updates.

Manual List Update

To update a list manually, select it from the list view and click the **Add records** button at the bottom of the screen. (Note that this function is not available for lists of Salesforce.com type.) A list update wizard appears. Its screens and properties are described as follows.

Name and Source screen

List name

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

Data source

Data source is the source of data for this list. To upload a file from a local source, select **Upload**, click **Browse**, and select the data file. To obtain data from an external source, select the transport protocol (*FTP* or *SFTP*), and specify the address (URL), *Username*, and *Password*.

Note that only plain text list files (.CSV or fixed width) are supported as sources for list data. Note that the data structure of the selected data source shall correspond to the data structure of the data source used for the original import.

Update Policy screen

replace list data

Select this option if the data from the specified data source shall replace the existing list data. Note the following:

- Any [campaign results](#) that may have been associated with the existing list records will be deleted.
- Replacement of existing list data requires internal re-processing of the entire calling list. Thus, if updates with this policy are applied to a list within a running campaign, use of this list within the given campaign will be suspended until list re-processing 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.

add list data

Select this option if the data from the specified data source shall be added to the existing list data. Note that data records whose keys match with keys of the existing records will not be imported.

Import Complete screen

Import results

This screen provides statistics about the imported list, including the number of successfully imported records, as well as the numbers of records that have not been imported for various reasons.

List Properties and Automated Updates

To view the current content of a list, set up periodic automatic updates, or view the list import/update history, select the desired list from the list view.
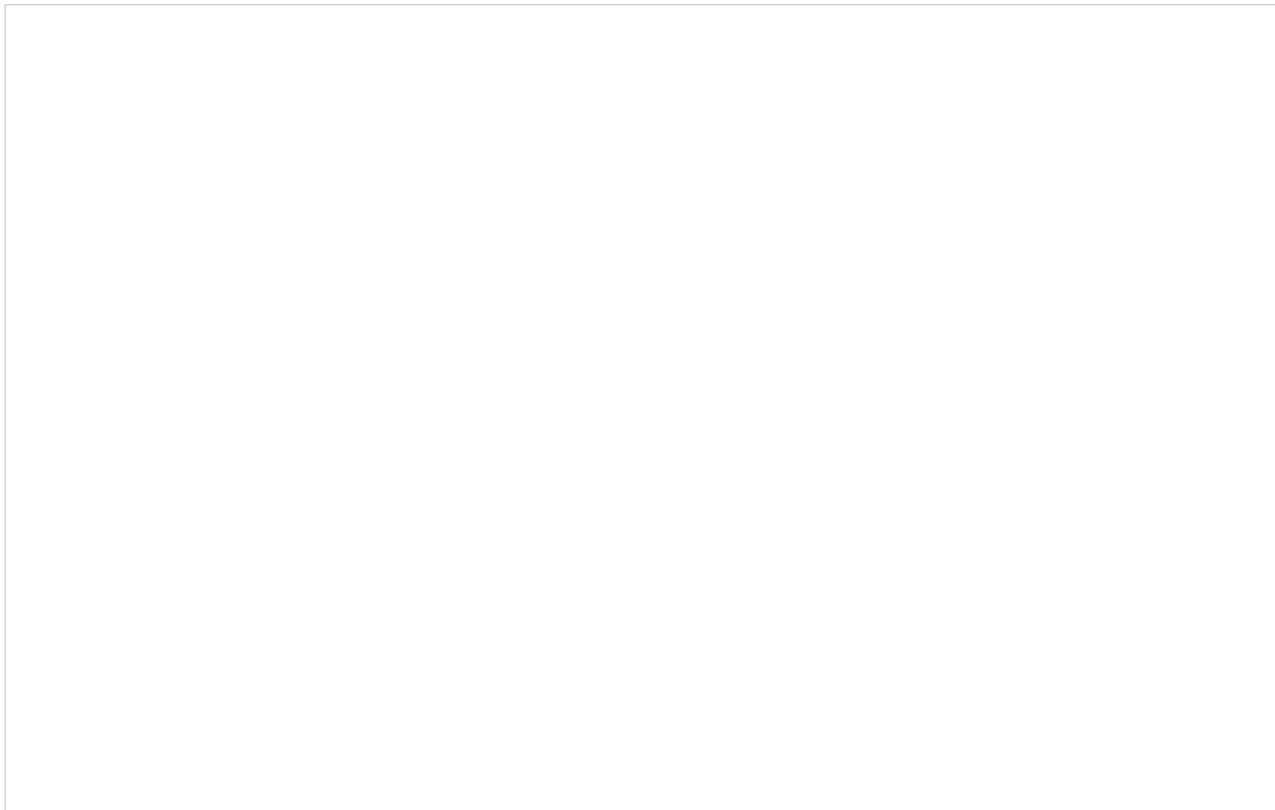
Lists > Properties tab

Lists screen properties

Properties tab

Name

This is the *name* of the list. List name is originally defined during the initial list import, but it can be changed at any time. The name must be unique within the contact center.

Format

Format is the name of the format that this list is based on. It is read-only. (The format is selected or defined during the initial list import.)

To review the format, click the **view** link. A new dialog window will open with description of all fields defined within this format. For more information, see description of the **Fields** screen of the List Import Wizard above. If any [activity forms](#) are mapped to lists based on this format, this view will also show the[mapping between the form fields and list fields](#).

For lists of the Salesforce.com type, the window will also show the SOQL query that is used to extract the list records from the Salesforce.com application. While you cannot change the field composition or formatting, you can modify the data selection criteria for these fields (i.e., any condition in the *WHERE* part of the query). To do so, hover over the SOQL query and click **EDIT**. The new selection criteria will be applied upon the next list update.

Campaigns

Click **add** to associate this list with one or more campaigns. For additional configuration options related to use of the list within the associated campaign, select this campaign in the [Services and Campaigns](#) list view and open the [Lists](#) tab.

Expire records

You can set the list records to expire in a specified number of days. If a record expires before it is completed according to the regular campaign [dial rules](#), its processing within campaign will be finished with the[predefined disposition](#) *Record Expired*.

To set the records of the given list to expire, select the checkbox, specify the*Expiration period*, and indicate the starting point from which this period will be counted:

- To count from the date when records appear in the system (either via the initial list import or subsequent list updates), select **Count expiration period since record insertion**. This expiration mechanism can be used to comply with your local telemarketing regulations that may require periodic scrubbing of calling records against national or state-wide do-not-call lists, after which any unmatched numbers are considered to be good for dialing over a certain period (e.g., 30 days for numbers added to the US National Do-Not-Call Registry or 15 days for numbers ported to mobile phones).
- To count from the date specified in the calling record itself, select**Count expiration period using date in record**. This expiration mechanism can be used for calling lists that are based on customers' callback requests (opt-in callback lists) if your local telemarketing regulations require that such callbacks are made within a specific number of days.

Expiration period

Expiration period is the number days in which the records of this list expire. See the description of the**Expire records** setting for more information.

Expiration field

Expiration field is the field of the calling list that will be used to determine when the callback request was made, which is necessary in order to calculate when it expires. Only fields of type **Date/Time** are available for selection as expiration fields. This setting is essential if you have selected the **Count expiration using date in record** option. See the description of the **Expire records** setting for more information.

Periodic Import

To set up automatic periodic updates for this list, click **edit**.

In the dialog that appears:

1. Specify the protocol (*FTP* or *SFTP*), *URL with file name*, *FTP Username*, and *FTP Password*; this setting is specified for lists of *File* type only.
2. Select the *Start date and time* of the first update and specify the desired *Import interval*.
3. Select the desired *Update Policy*. (Note that the *replace list data* policy may suspend use of this list within a running campaign for the time it takes to re-process the list.) This setting is specified for lists of the *File* type only.
4. Click **OK**.
5. Once these parameters are defined, select the *Enabled* checkbox to activate periodic import.

For lists of the *Salesforce.com* type, new records matching the original SOQL query will be added to the list during each update, while any records that may have been removed from Salesforce will be disabled in the list. If there are campaign results available for such disabled records, they will be preserved.

For lists of the 'Salesforce.com *type, there is a 30-second timeout on the Bright Pattern Contact Center side to begin receiving data from SFDC after the SOQL query is submitted.*

You can also run import with the above settings at any time by clicking **Run import now**.

Contents tab

Lists > Contents tab

List pane

The *List pane* shows the entire content of the list. It is read-only.

Record pane

The *Record pane* shows the content of the record selected from the List pane. It is read-only.

Timestamp

Timestamp is the timestamp of the operation.

Errors is the total number of records that were not imported due to various errors (missing required fields, duplicate keys, incorrect format).

Operator

Operator is the username of the user who performed this operation.

Comment

Comment is the operation result.

Log Tab

Timestamp

Time stamp of the operation

File

Name of the list data source file

Direction

Type of the operation (*IN* for import/updates, *EXP* for export of campaign results)

Number of records

Total number of successfully imported/exported records during this operation

Errors

Total number of records that were not imported due to various errors (missing required fields, duplicate keys, incorrect format)

Operator

Username of the user who performed this operation

Comment

Operation result

1. REDIRECT [5.3:Contact-center-administrator-guide/Scenarios/ScenariosOverview](#)

1. REDIRECT [5.3:Contact-center-administrator-guide/CallCenterConfiguration/AuxiliarySkills](#)

Purpose

The Bright Pattern Contact Center *Wallboard Builder Reference Guide* describes the elements of the Wallboard Builder application that are used for viewing and editing wallboards in the Agent Desktop application.

The Wallboard Builder application enables you to customize the look and display of your contact center's wallboard. Cards and cells can be added, deleted, scaled, and expanded using mouseovers, click-and-drag, and drag-and-drop movements. In Agent Desktop, wallboards are shown in either Edit mode or Display mode. Users with the privilege *Customize Wallboards* may edit a wallboard's layout.

Wallboard localization is supported in English, German, and Japanese.

For information about granting privileges for customizing, pushing, and pulling wallboards, refer to the[Contact Center Administrator Guide](#).
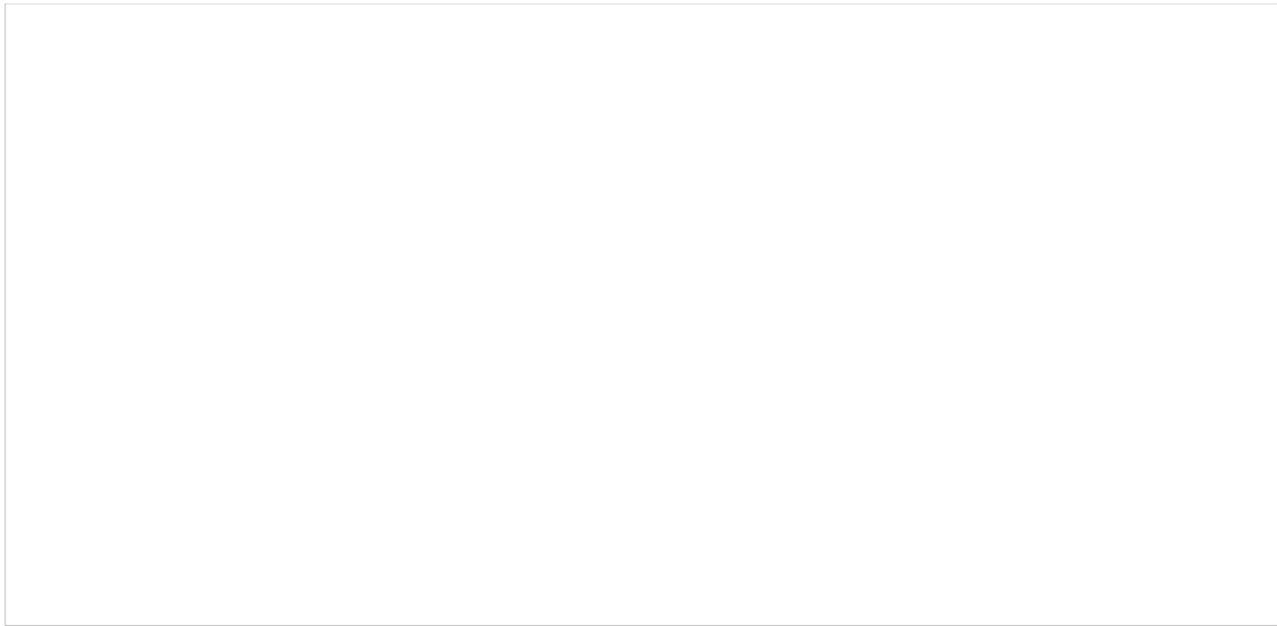
Viewing a customized wallboard

1. REDIRECT 5.3:Contact-center-administrator-guide/ServicesandCampaigns/EmailTab

Interaction Records Search

When you select the *Interaction Records* tab from the top of the screen, the application pane will initially display a search page where you define media type(s) of the interactions you are looking for as well as other search criteria, such as time frame, participating agent(s), and/or service(s) involved.

This section offers an overview of the Interaction Records Search feature. For detailed descriptions of search criteria and search results, see sections [List of Interaction Records Search Criteria](#) and [Search Results](#).

Notes:

- Only completed interaction segments appear in the Interaction Records search. For emails, this means that an email will only appear in search results after it has been replied to, closed without reply, or saved as a draft. Thus, emails in the initial distribution queue will not be shown.
- The standard aggregation period for the raw data used to produce detailed interaction records and historical reports is 15 minutes; therefore, under normal circumstances, detailed records for completed interactions and agent activities are available in Interaction Records and Agent Timeline within 15 minutes.
- In a worst-case scenario, the recordings for an interaction may be unavailable during two aggregation intervals (i.e., 30 minutes). Therefore, we recommend reviewing an interaction 30 minutes after it is completed.
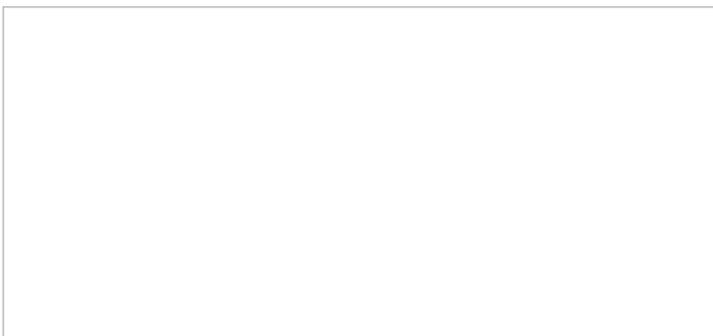
Adding Search Conditions

Your search criteria can have any number of [conditions](#) (i.e., search criteria). To add a condition to your search, click **add condition**. To edit or delete an existing condition, use the mouse-over operation.

Interaction records search

Saving Search Conditions

You can save a set of search conditions for future use--a helpful capability for when you regularly run the same searches and you do not want to add conditions manually each time you search. To save a set of search conditions, click **Save** and assign a name to it. To use a previously saved set of search conditions, click **Load**, and select its name from the drop-down menu.

Click "Save" to save your search conditions for future use

Viewing Search Results

When all desired search conditions are specified, click the **Search** button. The [Search Results](#) page will open with the list of interaction records matching your search criteria. Each row of the displayed table describes a single interaction.

Search results

Note that an interaction may have multiple segments (e.g., when a call was handled by multiple agents). The number of segments in a call is shown in the *Segments* column. You can see details for each segment of a selected call by clicking that number.

Some columns show data that is media-type specific (e.g., *Case ID Subject* is only relevant for emails). You can adjust the format of your table to display only the columns for the data that you need. To remove columns, hover over any column header, open the drop-down menu, and unselect the columns for the data you do not need.

You can download all records that appear in the Search Results page in the .CSV format. To export the records, click the **export** button at the bottom of the page.

You can also manually download email content, call recordings, and call progress analysis (CPA) recordings for the interactions shown in the *Search Results* page. Note that manual download is limited to up to 100 emails, 100 call recordings, and 500 CPA recordings, respectively.

Periodic automated export of call/CPA recordings is configured via *[Services and Campaigns > Results Tab](#)* of the Contact Center Administrator application.

Erasing Interaction Content

The *Erase* feature for an interaction record allows you to remove the content of the record (i.e., voice recording and/or transcript for a call, the transcript for a chat, message body for an email, etc.), which may be necessary in order to comply with privacy laws or security standards. When taking this action, note that you can delete the content of one interaction at a time. For bulk erasure of interaction content, see the *Contact Center Administrator Guide*, section [Results Tab > Interactions Erasing](#).

An interaction record with the option to erase it

How to Erase Interaction Content

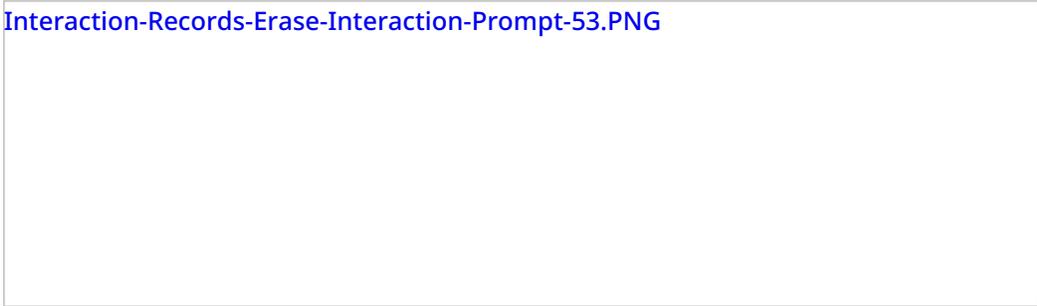To erase content of a single interaction, take the following steps:

1. Configure the desired criteria for your records search and find the desired interaction record.
2. Open the record for review by clicking it's content item.
3. At the bottom of the record, select the **Erase** [ ] button; this will pop the *Erase interaction* window

Interaction-Records-Erase-Window-1-53.PNG

4. Select **Items to erase**, which displays the type of content you wish to erase (e.g., a voice recording, a transcript, or both)
5. Fill in the mandatory **Reason** field; this allows you to provide a reason the content was erased.
6. Select the **Erase** button and you will see a new prompt, warning you that erasing the interaction is permanent.

Interaction-Records-Erase-Interaction-Prompt-53.PNG

7. Select the **Erase** button again and the interaction will be permanently erased. Note that for email interactions, the *Erase* function erases content of one email message at a time. For other media types (voice, chat), the content of the entire interaction will be erased at once, regardless of the number of interaction segments.
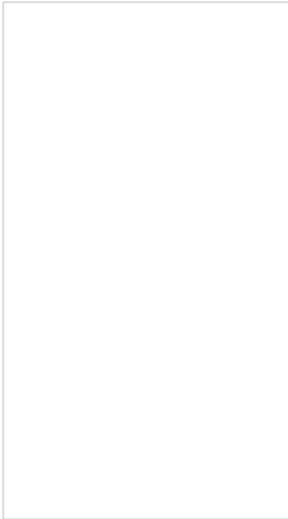
Note that in the interaction window, if you select the segment that was erased, a message will display the time, date, user, and reason the interaction was erased.

Interaction-Records-Erased-Interaction-Message-53.PNG

Real-Time Metric Alerts

You can set thresholds for some of the service, campaign, and agent metrics and be visually alerted whenever the current values of the corresponding metrics reach those thresholds.
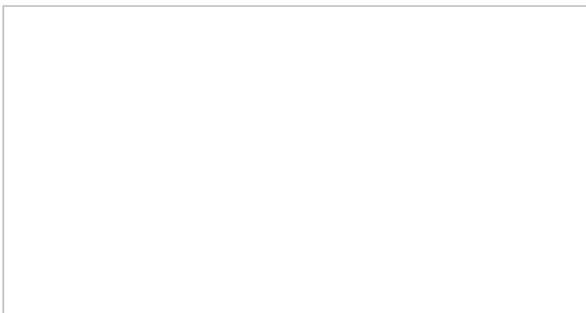
Alert configuration
option

Visual alerts are provided in two forms: a pop-up window and a color change in the metrics view. You can configure a different alert color for each metric and choose whether the text or the background of the corresponding cell will be highlighted with this color. Whenever a configured threshold is reached for a specific metric:

- A pop-up window will be displayed with the metric name and its actual current value.

- The actual real-time value of this metric will be highlighted with a selected color in the metrics view. When the actual value drops below the threshold, the alert will be cleared, i.e., the metric value will again be displayed with the regular color.

For more information, see *Tutorials for Supervisors*, section [Customizing Real-Time Metric Alerts](#).
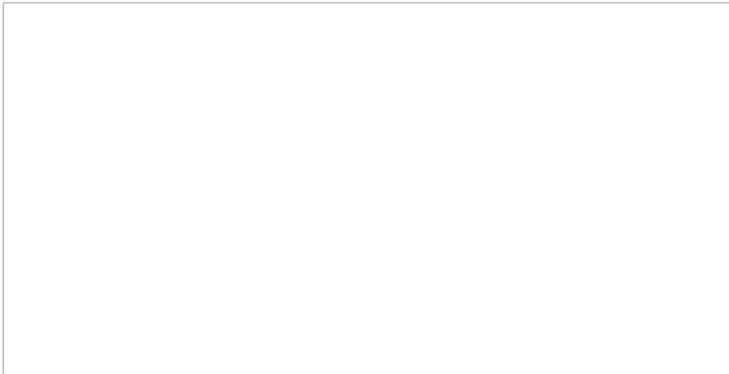
Alerts can appear as pop-up windows

Customization of Metric Views

Depending on your permissions, you may be able to customize real-time metric views by removing undesired metrics, adding other metrics that you may want to see, and changing the order in which metrics are arranged in the table. You may also be able to set such a customized view as a default view for all other supervisors of your contact center.

Adding and Removing Metrics

To remove a particular metric:

1. Hover your cursor over the corresponding column name and click the drop-down menu icon ☐ that will appear.
2. Select the **Hide metric** option.

How to hide metrics

To add a metric:

1. Hover your cursor over the name of the column next to where you want to add this new metric, and click the drop-down menu icon ☐ that will appear.
2. Select the **Add metrics...** option. A list of available metrics will appear with checkboxes next to their names.
3. Locate the desired metric in the list and select its checkbox.
4. Click **OK**.

Select the metrics to be shown in Agent Desktop

Rearranging Metrics Columns and Reverting to Default Views

To rearrange the order of columns in the metrics view, use the mouse to click on and drag the name of the columns to the desired locations.

Click and drag to
arrange metrics

You can also restore the original metrics set with the original order of columns. To do so, open the drop-down menu next to any metric and click the **Restore default view** option.

Saving a New Default View

Once you have completed all of the desired configuration changes, you can set the new view as the new default view for all other supervisors of your contact center. To do so, open the drop-down menu next to any metric and click the **Set view as default system-wide** setting. Note that this function requires a separate permission.

The list of metrics that appears when you click the **Add metric...** option contains brief descriptions for all real-time metrics available for the selected object (service, campaign, or agent). For the descriptions of metrics currently displayed in the metrics views, you can simply hover over the corresponding column titles.

For more detailed metric descriptions, follow these links:

- [Service Metrics](#)
- [Skill Metrics](#)

Call Recordings

Interaction records that are associated with call recordings are displayed with an audio icon. By clicking the icon, you can listen to a call recording and review any agent-provided notes associated with the call. Call recordings are useful for supervisors, for example, who may wish to review agent calls, evaluate agent performance, and save agent ratings.

Recording playback and grading

Listening to Call Recordings

To listen to a call recording, proceed through the following steps.

Step 1: Click ☐ **and play the recording.**

- The audio icon appears next to the corresponding interaction record. The *Review Call Recording* page will open with standard audio controls.

- Note that Depending on the type of media player used, the audio controls may appear only when you hover over the *Conversation recording* area. When using the *Review Call Recording* function for the first time in your browser, you may need to install the media player plug-in (extension). Also, depending on the internet security settings of your browser application, you may need to confirm your permission to use the media player on this page.

- If the agent entered a disposition or provided any free-form notes for this call, those items will be displayed on the *Review Call Recording* page as well.

- Click the play button to listen to the recording.

Step 2: Grade agent performance and comment.

If any categories for agent performance evaluation have been defined in your contact center configuration, you can grade the agent performance during the selected call on a scale of one to nine in any of those categories. You can also enter some free-form comments about this call recording.

Click the **Rate** button to save the data you have entered. Your grades and comments for this call recording will be stored and made available to other users who may subsequently review this call record.

Note that the same call recording is provided for all call segments, but you can grade performance of each agent who handled the call separately. Use the **next** and **previous** buttons to navigate between segments. Absence of any call grading categories on the *Review Call Recording* page for a particular call segment means that during that segment the call was connected to an IVR application.

Step 3: Save recordings and associated grades/notes.

- To download the grades, reviewer's notes, and the recording to your computer, click**Save As**.

- To share a link to the call recording with other reviewers, click **Copy link to share**. The link to this page will be copied to the clipboard. You can then paste this link to an email or text message to other people in your organization.

Note that in order to access the recording these people must have[privilege](#) *Listen to call recordings and chat transcripts*.

Changing Agent State

As a supervisor, you can change the current state of any agent of your team. For example, if the Service Level drops below the specified threshold, you can force some agents to become [Ready](#) while they are in the[After Call Work](#) state in order to speed up the distribution of calls waiting in the service queue. You can also force an agent to log out.

To change an agent state:

1. Click the **Agent State** icon in the[Agent Metrics View](#).
2. Select the desired agent state from the drop-down menu. Note that forced state changes may or may not be available depending on the current agent activity. For example, no forced state changes will be permitted for agents actively handling service interactions.
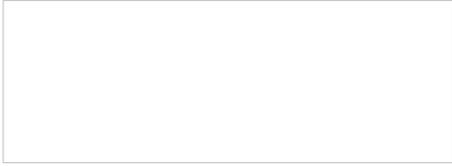
Changing agent state

# General Information About Quality Management

In contact centers, quality management usually refers to the assessment of the quality of agent work via reviewing the available call and screen recordings, chat transcripts, and email messages. In Bright Pattern Contact Center, the results of such reviews can be expressed using a number of customizable grading categories, such as politeness and knowledge.

In this *Reporting Reference Guide*, Quality Management sections Call Recordings, Chat Transcripts, Email Messages, and Screen Recordings relate to the data provided in the Interaction Records Search Results.

How to Review Call Recordings, Chat Transcripts, and Email

To review call recordings, chat transcripts, or email messages, first select the desired interactions as described in section Interaction Records Search. The search conditions depend on your quality management practices. For example, if quality monitoring is based on random checks of agent recordings or transcripts, it is usually sufficient to define the agent's username and the desired time frame as your search conditions. If, on the other hand, you follow-up on a specific customer complaint, your search conditions may contain the customer's phone number, service name, and time frame.

When all desired search conditions are specified, click the **Search** button. The *Search Results* page will open with the list of interaction records matching your search criteria. If a particular interaction has been previously reviewed and rated, the user name will appear in the *Reviewed by* column.
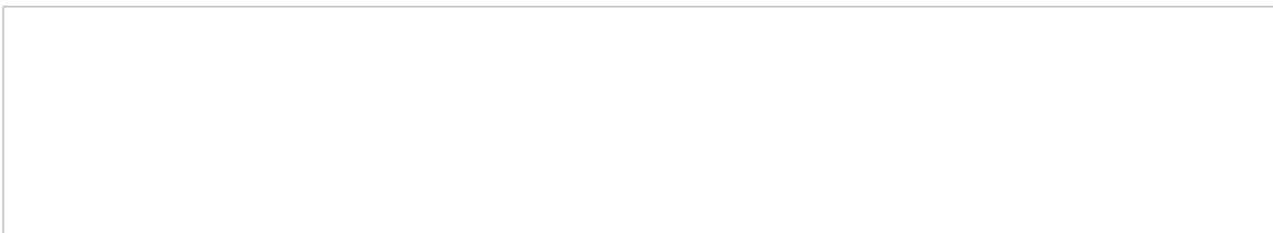
The Search Results page displays all interaction information

Recording Availability

For phone calls, the availability of a recording for a particular call will be indicated by the audio icon ☐ in the *Recording* column. The percentage of recorded calls is specified in your [contact center configuration](#) and can be redefined for each [service](#) and each [individual agent](#) separately. If not all calls in your contact center are recorded, you can use filter *has recording* to limit your search results to call records that actually have recordings.

For chat interactions, the availability of a chat transcript is indicated by the messaging icon ☐ in the *Recording* column. Bright Pattern Contact Center unconditionally records transcripts for all chat service interactions and stores them for the same amount of time as the corresponding interaction records themselves. Therefore, you do not need to use any special filters to get access to chat interactions with transcripts.

Agent Activity Search

When you select option *Agent Timeline* from the menu on the left, you will see a set of search filters where you select an agent and set a desired time frame. Click the **Search** button.

The search results pane displays all states within all working sessions of the selected agent that fit in the specified time frame. States are represented by the same icons that are used in the [Agent Desktop application](#). For each state, information about its start time, end time, and duration is provided. For interaction-handling states (*Busy* and *After-Call Work*), the media type of the handled interaction is displayed.

For agent sessions where screen recording was used, a screen recording icon ☐ is displayed for all states within those sessions. See section [Screen Recordings](#) for more information.
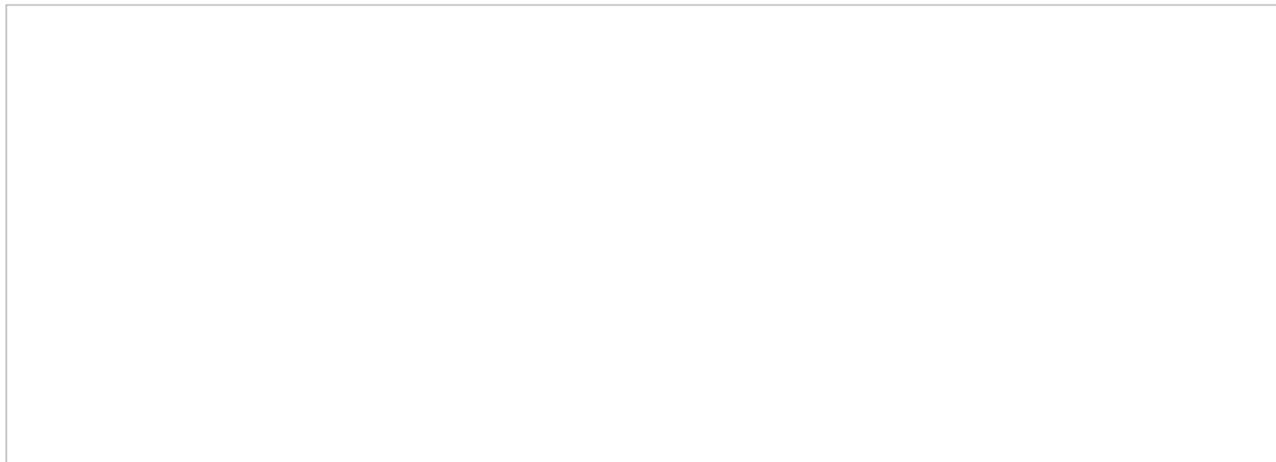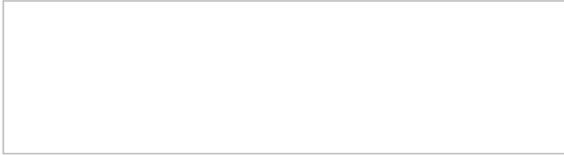

Agent activity search

1. REDIRECT [5.3:Agent-guide/Tutorials/Chat/HowtoCreateandEditCannedChatResponses](#)

Call Monitoring, Coaching, and Barge-In

As a supervisor, you can connect to a service call or chat handled by any member of your team. You can do this in order, for example, to monitor the quality of service or to help an agent with a difficult interaction. Note that the agent may send you a chat message (see section [Individual Chat](#)) or flag an interaction that the agent needs immediate help handling. When the interaction is flagged, you will see the flag icon next to the agent's state in the *Agent Metrics View*.

Flagged call in Agent Metrics View

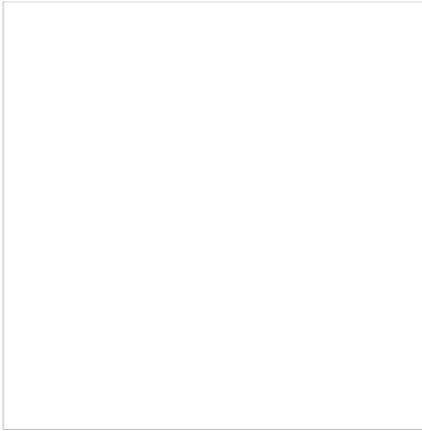Depending on the purpose, you can select one of the following three connection modes:

- **Monitor** - In this mode, you may observe the interaction. For calls, this means you can hear the conversation between the agent and the customer, but neither of them can hear you; for chats, this means you can observe the interaction as it is happening. Note that the agent will not have any indication that his interaction is being monitored. However, if you wish to make a suggestion for the agent, you can do this using chat.

- **Coach** - In this mode, you may provide feedback to agents while observing the interaction. For calls, this means you can hear the conversation between the agent and the customer, and you can talk to the agent. The agent will hear you, but the customer will not. For chats, this means you can see the chat as it is happening and chat with the agent without any indication to the customer.

- **Barge-in** - In this mode, both the customer and the agent will hear you speak or see you chat and will be able to interact with to you.

You can connect to a service call or chat using any of the above modes, and you can switch from one mode to another at any time and any number of times during the same interaction. For example, if an agent sends you a chat message requesting help with a difficult call, you can first listen to the call in *Monitor* mode and then, depending on your assessment of the situation, either switch to *Coach* mode to provide instructions to the agent or activate *Barge-in* mode to participate actively in the conversation with the customer.

How to Turn On/Off Supervision Modes

To activate one of the supervision modes:

- Select an agent from the *[Agent Metrics View](#)* in the right pane of Agent Desktop. The agent must be handling an active interaction and be in the [Busy](#) state.

- The *Contact Info Panel* will display the monitoring functions.
    - If the *Monitor/Coach/Barge-in* button displays the desired supervision mode, click the button.
    - If you wish to be connected in a different supervision mode, click the arrow section of the *Monitor/Coach/Barge-in* button, and select the desired supervision mode from the drop-down menu.

Call Monitoring and Pull Screen
controls

When you are connected to an interaction in a particular supervision mode, the *Monitor/Coach/Barge-in* button will display the "next" supervisor mode (i.e., if the current mode is *Monitor*, the button will display *Coach*, and so on).

- To switch to this "next" mode, click the button itself.
- To switch to a different supervision mode (e.g., from *Monitor* directly to *Barge-in*), click the arrow section of and select the desired supervision mode from the drop-down menu.

If on a call, the system will automatically start call recording as soon as you connect to this call in any supervisor mode. Note also that the system supports simultaneous monitoring of one agent by more than one supervisor.

To stop the supervision activity for this call:

Click the **End Call** button.

How to View Agents' Context Information Area

At any time during call supervision, you can view the content of the *Context Information Area* of the monitored agent's desktop. If this area is used to show any customer data related to the call, this may help you understand the context of the agent-customer interaction. To get the content of the *Context Information Area* of the agent's desktop, click the **Pull screen** button ☐.
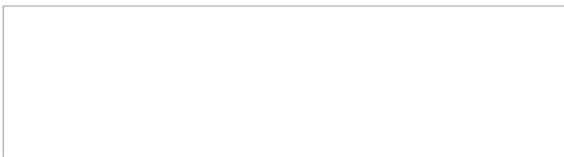
Note that the screen you will see is the screen that the agent received via screen pop (i.e., if the agent has changed screens after the initial screen pop, you will not see those changes). To monitor an agent's screen in real time, use the screen monitoring function.

An example of a supervisor's screen after barging-in on a flagged chat

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When you are connected to an interaction in a particular supervision mode, the *Monitor/Coach/Barge-in* button will display the "next" supervisor mode (i.e., if the current mode is *Monitor*, the button will display *Coach*, and so on).

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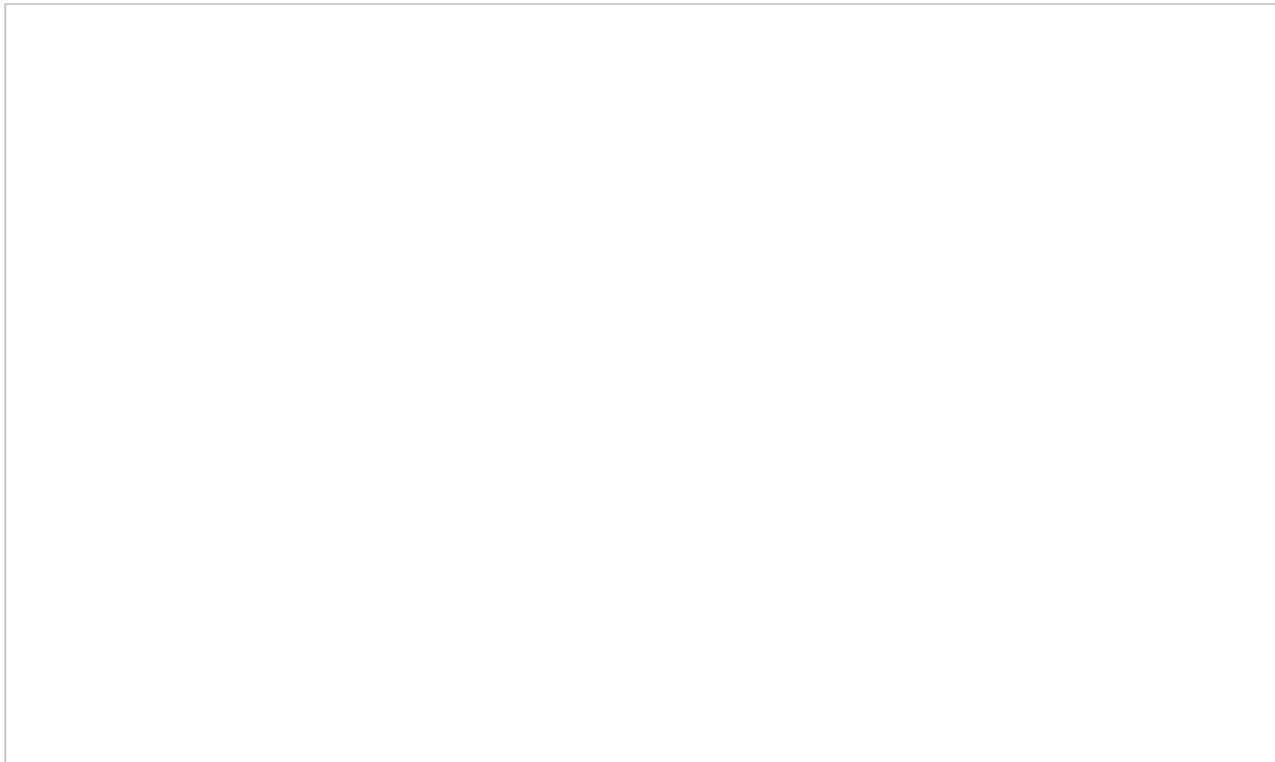
To stop the supervision activity for this call:

Click the **End Call** button.

How to View Agents' Context Information Area

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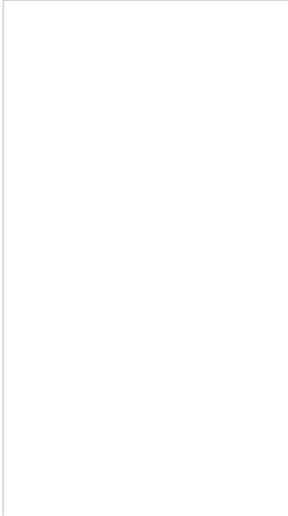
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An example of a supervisor's screen after barging-in on a flagged chat

Real-Time Metric Alerts

You can set thresholds for some of the service, campaign, and agent metrics and be visually alerted whenever the current values of the corresponding metrics reach those thresholds.
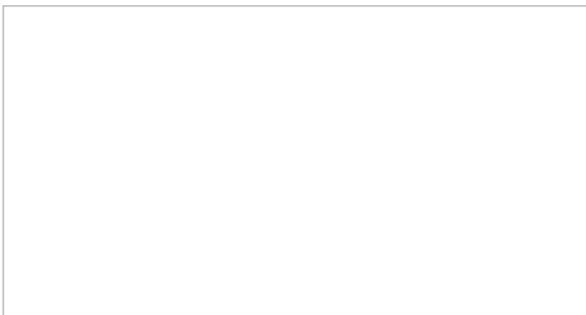

Alert configuration option

Visual alerts are provided in two forms: a pop-up window and a color change in the metrics view. You can configure a different alert color for each metric and choose whether the text or the background of the corresponding cell will be highlighted with this color. Whenever a configured threshold is reached for a specific metric:

- A pop-up window will be displayed with the metric name and its actual current value.

- The actual real-time value of this metric will be highlighted with a selected color in the metrics view. When the actual value drops below the threshold, the alert will be cleared, i.e., the metric value will again be displayed with the regular color.

For more information, see *Tutorials for Supervisors*, section [Customizing Real-Time Metric Alerts](#).
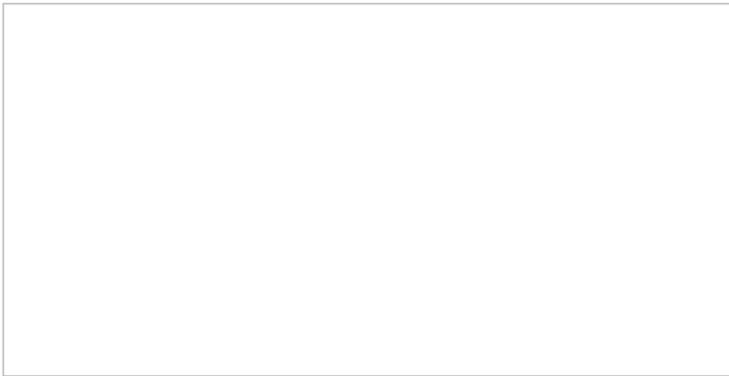

Alerts can appear as pop-up windows

Customization of Metric Views

Depending on your permissions, you may be able to customize real-time metric views by removing undesired metrics, adding other metrics that you may want to see, and changing the order in which metrics are arranged in the table. You may also be able to set such a customized view as a default view for all other supervisors of your contact center.

Adding and Removing Metrics

To remove a particular metric:

1. Hover your cursor over the corresponding column name and click the drop-down menu icon☐ that will appear.
2. Select the **Hide metric** option.

How to hide metrics

To add a metric:

1. Hover your cursor over the name of the column next to where you want to add this new metric, and click the drop-down menu icon ☐ that will appear.
2. Select the **Add metrics...** option. A list of available metrics will appear with checkboxes next to their names.
3. Locate the desired metric in the list and select its checkbox.
4. Click **OK**.

Select the metrics to be shown in Agent Desktop

Rearranging Metrics Columns and Reverting to Default Views

To rearrange the order of columns in the metrics view, use the mouse to click on and drag the name of the columns to the desired locations.

Click and drag to
arrange metrics

You can also restore the original metrics set with the original order of columns. To do so, open the drop-down menu next to any metric and click the **Restore default view** option.

Saving a New Default View

Once you have completed all of the desired configuration changes, you can set the new view as the new default view for all other supervisors of your contact center. To do so, open the drop-down menu next to any metric and click the **Set view as default system-wide** setting. Note that this function requires a separate permission.

The list of metrics that appears when you click the **Add metric...** option contains brief descriptions for all real-time metrics available for the selected object (service, campaign, or agent). For the descriptions of metrics currently displayed in the metrics views, you can simply hover over the corresponding column titles.

For more detailed metric descriptions, follow these links:

- [Service Metrics](#)
- [Skill Metrics](#)

Report Generation

When you select option **Reports** from the menu on the left, the application pane will display the list of available reports. By default, these are the predefined reports supplied with Bright Pattern Contact Center. If you have previously created some custom reports using Jaspersoft Studio and uploaded their definitions into the system, such custom reports will also appear in the list of reports. For more information about stock and custom report definitions, see section [Report Templates](#) of the *Contact Center Administrator Guide*.
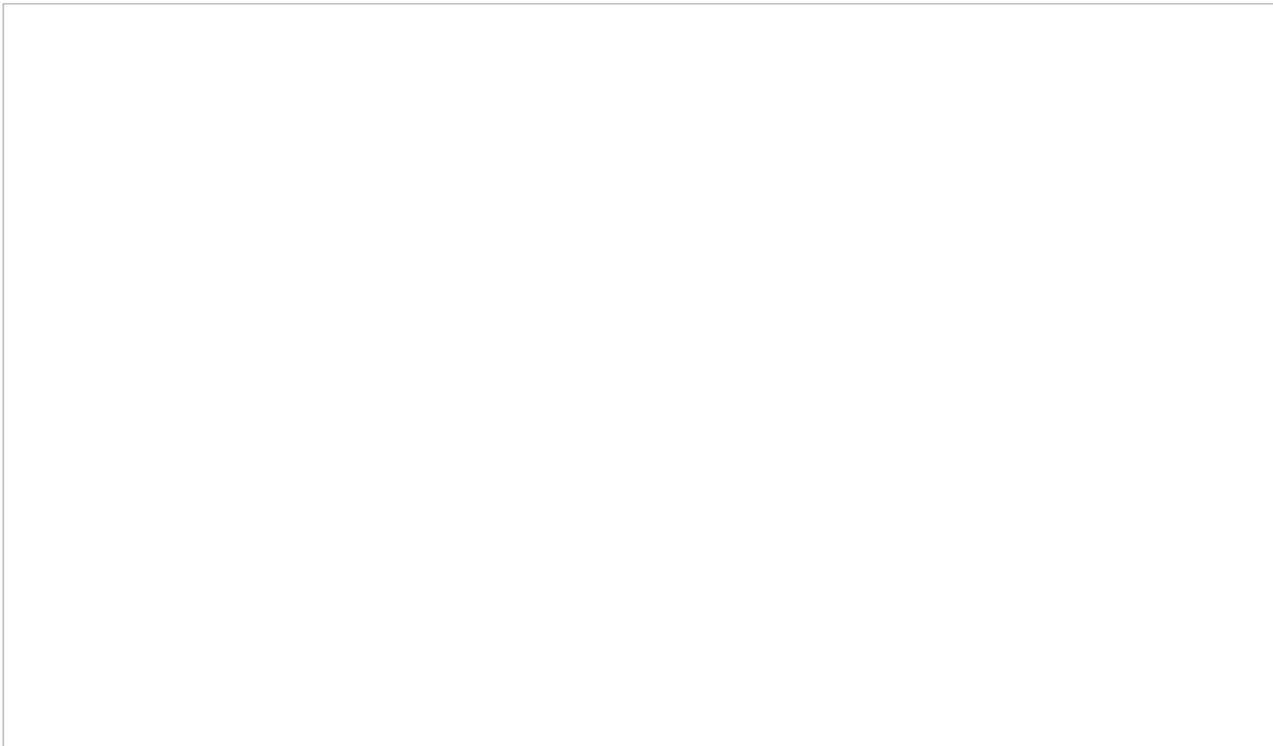
Reports overview

The reports are grouped by the type of contact center resources that they describe. Within each group, the reports are listed in alphabetical order according to the names of the corresponding report definitions. A description is provided for each report. If a description does not fit on the screen, hover over it to see the full text of the description in a tooltip box.

Select the desired type of report from the list. In the view that appears, use the report generation filters to select the resource for which you want to generate the report and to specify the reporting interval. Depending on the report type, you can select multiple resources and apply additional filters.
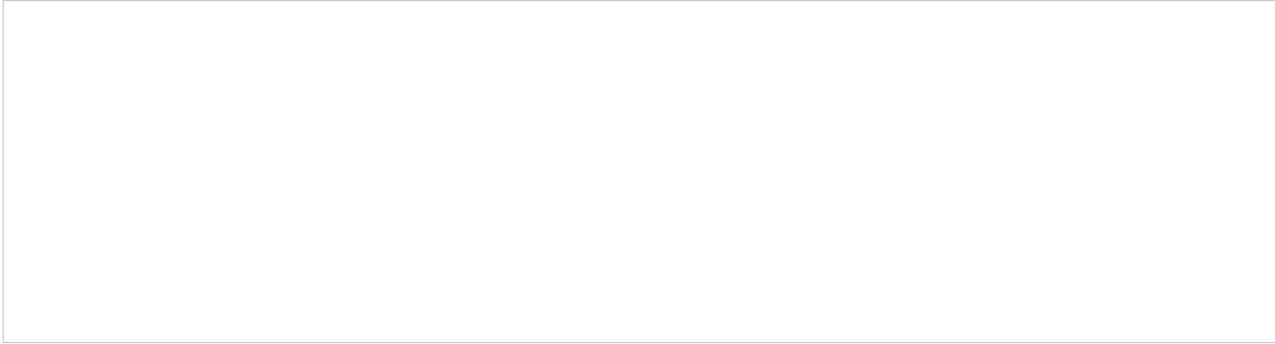
Report generation filters

Agent Selection Options

For reports where the agent drop-down selector is present, please note the following:

- The selection of multiple agents is available for the following reports:
  - [Agent Activity](#)
  - [Agent Activity (CSV)](#)
  - [Agent Email](#)
  - Agent Login/Logout
  - [Agent Performance](#)
  - [Internal Chats](#)
  - [Intra-Team by Service](#)
  - [Intra-Team Performance](#)

- Agent names are listed alphabetically in the drop-down selector; depending on your center's configured [display name format](#), this will be by first or last name.
  - Depending on your center's configured name display, you may search for a specific agent by typing out the first letters of their name.
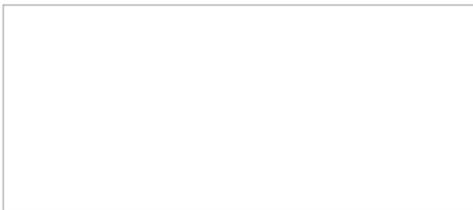
An example of searching for agent names starting with the letter "L"

- Agents that have been inactive for more than 30 days will be excluded from the drop-down selector; agents that had activity within 30 days before the search period will have their names displayed as grey, italicized text.
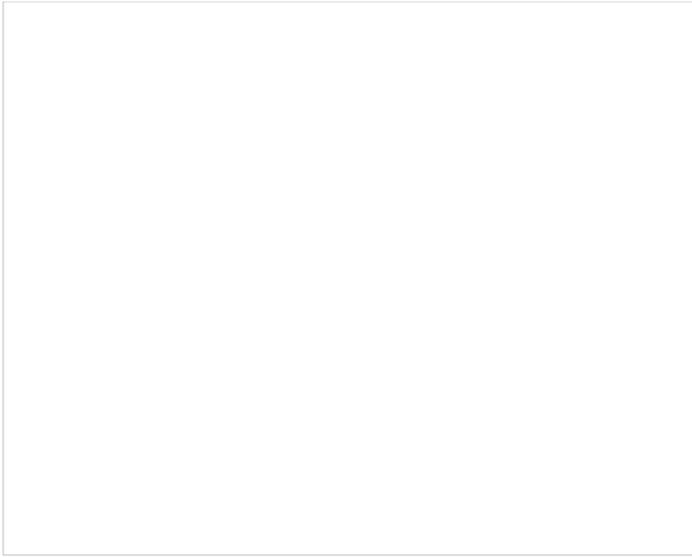
Agent names displayed as grey, italicized text indicates activity recent to the search period but not within the period

- Additionally, you may select the **Show disabled/deleted agents** checkbox from the drop-down menu to automatically include disabled and/or deleted agents from the report; the inclusion works even if agents had activity within the report's timeframe.
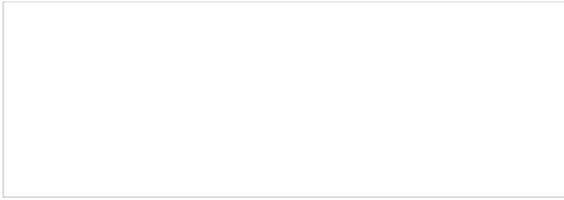
How to Clone Reports

To create a copy of a report, click the **Clone** button.
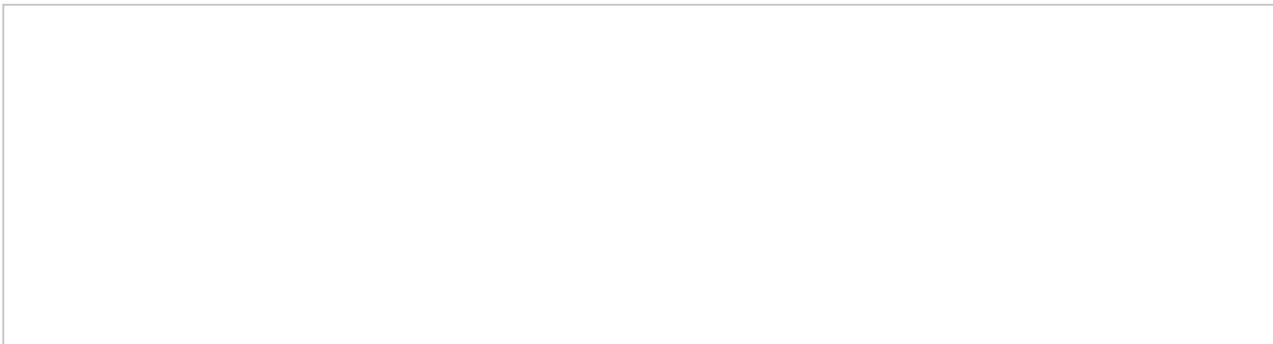
Clone

The report you clone can be found in the list of available reports under *Clone of Report Name*; from here you may [rename](#) and [customize](#) the report.

Clone of ...

How to Delete Cloned Reports

To delete a cloned report from the list of all reports, click the **Delete** button. Note that it is possible to delete cloned reports only. The selected report will be deleted from the full list of reports available for your contact center.
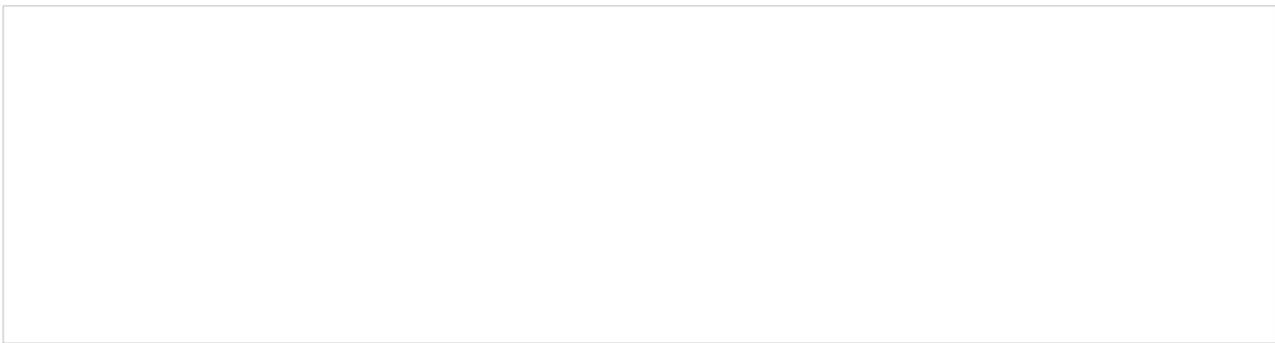
Delete

How to Rename Reports

To rename a report, click the **Rename** buttton; a dialog window will pop where you will enter the report's new name. The selected report will display the new name and will be available from the full list of reports available for your contact center.
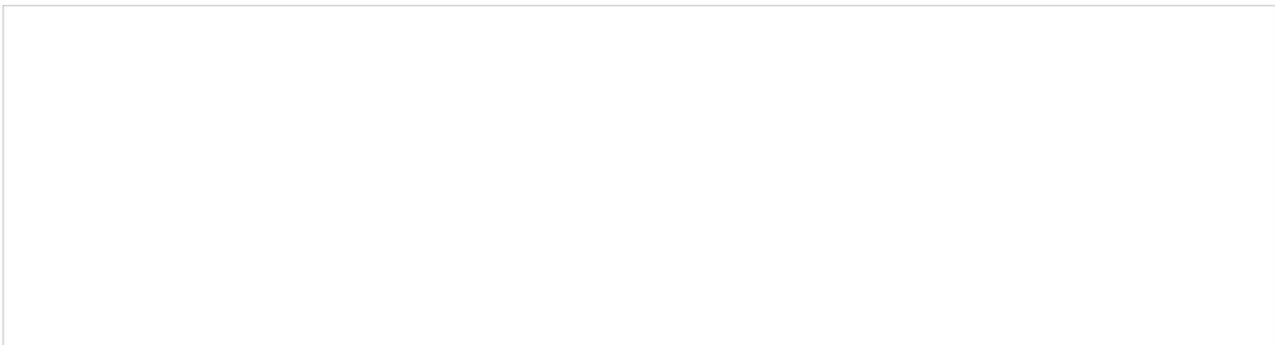
Rename

How to Run Reports

To generate the report, click the **Run Report** button at the bottom of the report details pane. Report generation may take a few moments.

Run Report

The report will appear in a separate browser tab/window and occupy the entire available browser window space. Thus, you can have multiple reports open in your browser at the same time. Generated reports will continue to be available for viewing even when you close the Contact Center Administrator application. Depending on the amount of data, the generated report may occupy more than one page.
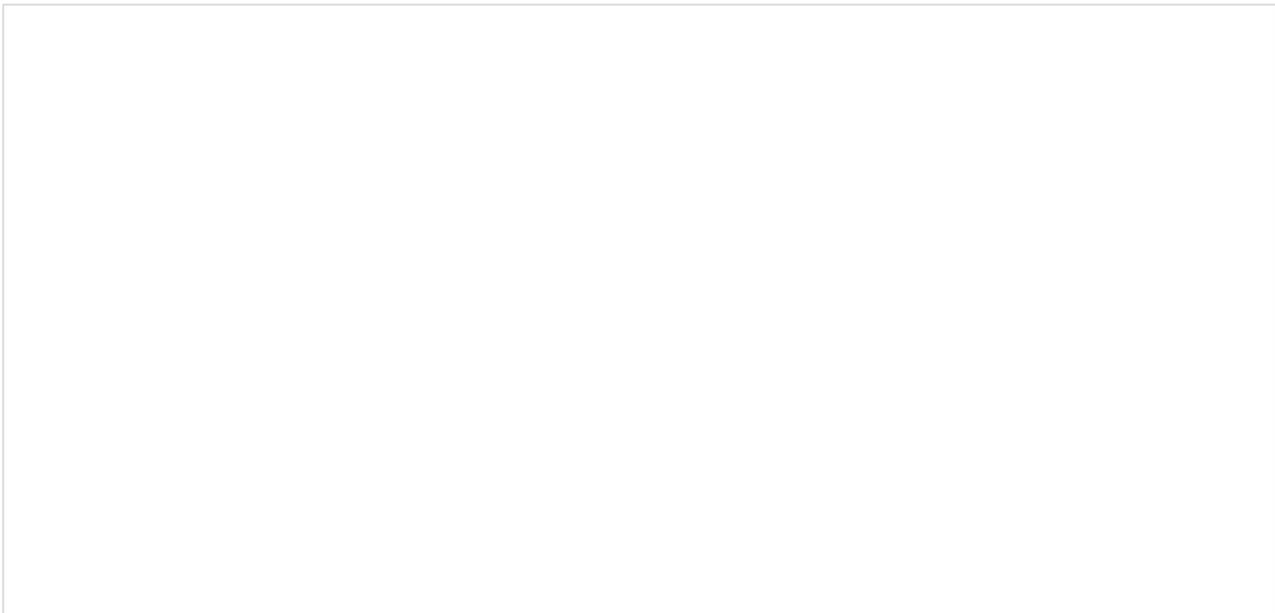
The generated report opens in a new browser tab/window

How to View and Use the Generated Report

The generated report appears as a static table of data within your browser tab/window. Usable links for navigation and export are located at the top of the page. If you export the report to a format such as .XLS, you can filter, sort, and reformat the data just as you would for any other spreadsheet.

Navigation

To navigate through the contents of the report, use the page navigation arrows or enter the page number you wish to view.

Metrics

To learn more about the metrics provided by each report, see sections [Detail Reports](#) and [Aggregate Reports](#).

Exporting Reports

To export the generated report, choose the format (PDF, XLS, CSV, or TXT), and click the corresponding link.

Running the Report Again

To run the same report for a different resource and/or different reporting interval, simply change the filter setting and click the **Run Report** button again.

Going Back to Reports

To return to the list of reports, go back to the Contact Center Administrator application, section Reports, in your other browser tab or window.

How to Customize Reports

To customize the presentation of the report, click the **Customize** button.
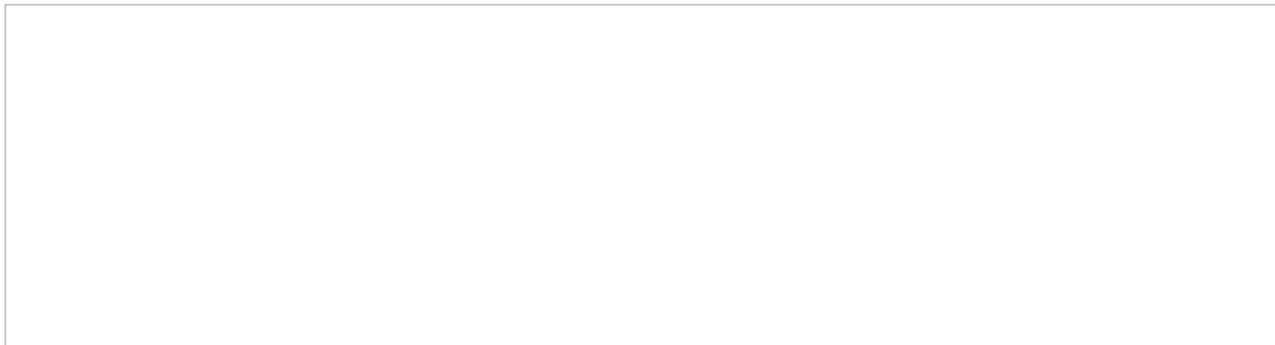
Click Customize

The report will be opened in a new browser tab or window in the *Report Customizer* application.

Using the Report Customizer application to customize columns and report contents

This web application allows you to do the following:

- Click and drag columns onto different places on the report

  Changing-Column-Placement-50.png

- Adjust the width of columns by clicking and dragging the column borders

Adjusting-Column-Width-50.png

- Remove columns by dragging them to the margin of the report
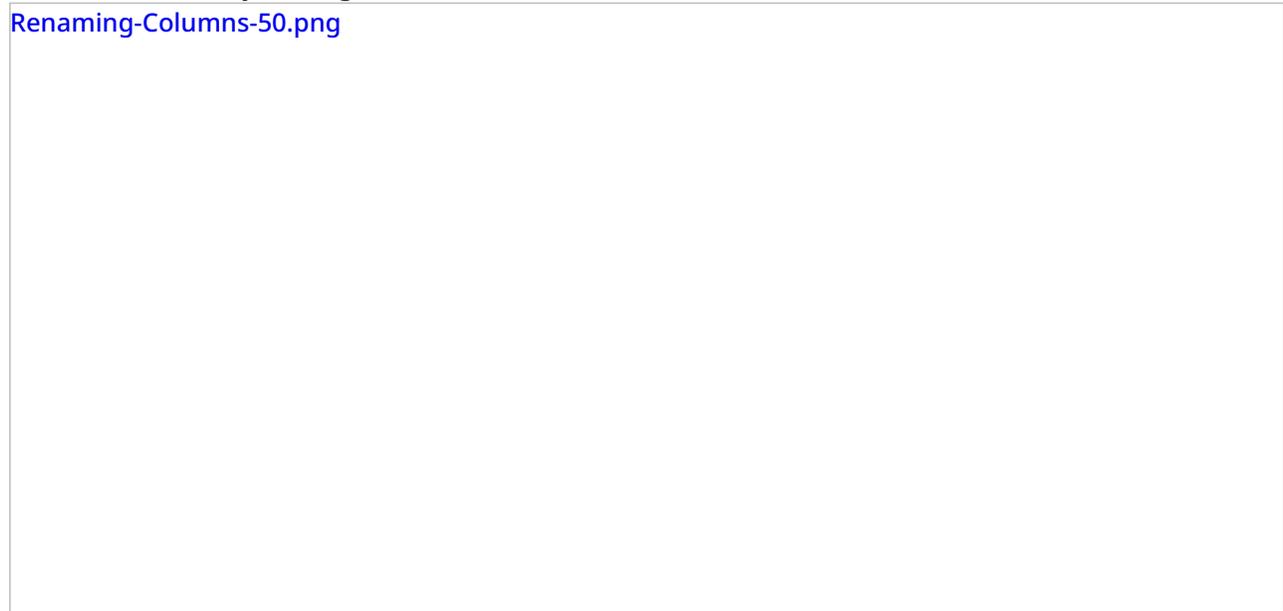
Removing-Columns-Report-50.png

- Add columns by dragging them from the margin of the report to the main screen of the report

Adding-Column-Reports-50.png

- Rename columns by clicking into the column title

Renaming-Columns-50.png

- Search the report columns for specific keywords

Search-Available-Columns-50.png

- Save your customized report with a new name and description

Save-Customized-Report-50.png

Other Actions

- To view available charts for the report, select the **show charts** checkbox.
- To save your customized report, click **OK**.
- To cancel customization and exit the Report Customizer, click **Cancel**.

Scheduling Reports

You can also schedule automatic generation of reports and their delivery to specified destinations as email attachments or via FTP. For more information, see Scheduling Reports.

Interaction Records Search

When you select the *Interaction Records* tab from the top of the screen, the application pane will initially display a search page where you define media type(s) of the interactions you are looking for as well as other search criteria, such as time frame, participating agent(s), and/or service(s) involved.

This section offers an overview of the Interaction Records Search feature. For detailed descriptions of search criteria and search results, see sections List of Interaction Records Search Criteria and Search Results.

Notes:

- Only completed interaction segments appear in the Interaction Records search. For emails, this means that an email will only appear in search results after it has been replied to, closed without reply, or saved as a draft. Thus, emails in the initial distribution queue will not be shown.
- The standard aggregation period for the raw data used to produce detailed interaction records and historical reports is 15 minutes; therefore, under normal circumstances, detailed records for completed interactions and agent activities are available in Interaction Records and Agent Timeline within 15 minutes.
- In a worst-case scenario, the recordings for an interaction may be unavailable during two aggregation intervals (i.e., 30 minutes). Therefore, we recommend reviewing an interaction 30 minutes after it is
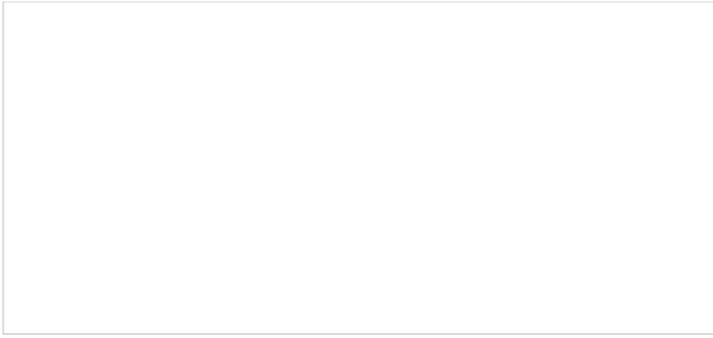
completed.

Adding Search Conditions

Your search criteria can have any number of [conditions](#) (i.e., search criteria). To add a condition to your search, click **add condition**. To edit or delete an existing condition, use the mouse-over operation.

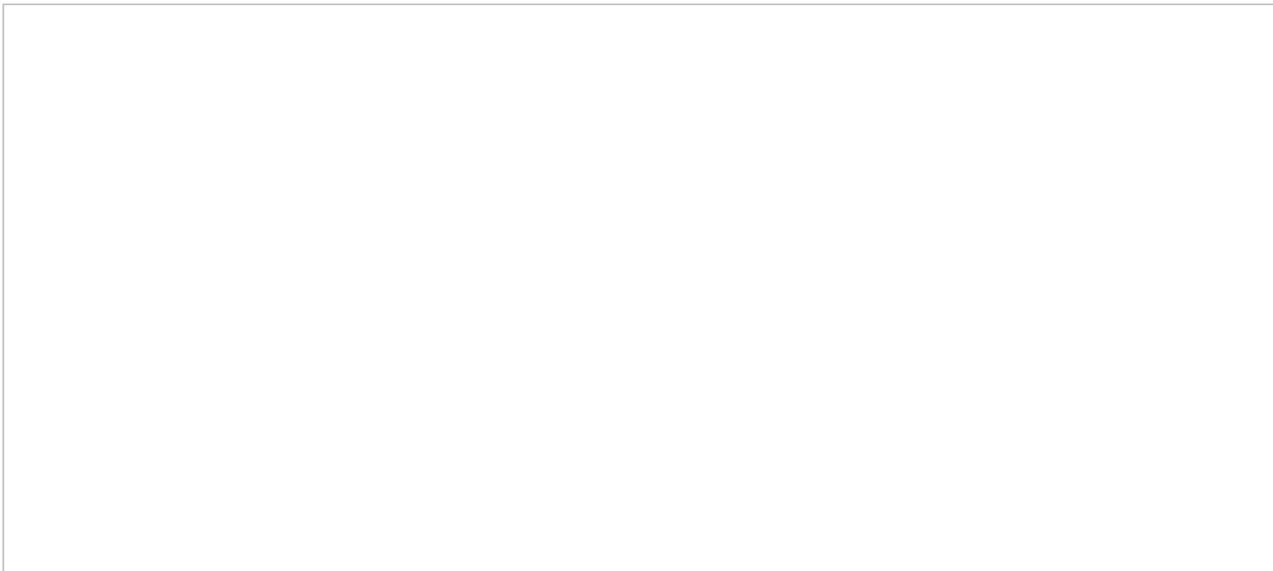Interaction records search

Saving Search Conditions

You can save a set of search conditions for future use--a helpful capability for when you regularly run the same searches and you do not want to add conditions manually each time you search. To save a set of search conditions, click **Save** and assign a name to it. To use a previously saved set of search conditions, click **Load**, and select its name from the drop-down menu.

Click "Save" to save your search conditions for future use

Viewing Search Results

When all desired search conditions are specified, click the **Search** button. The [Search Results](#) page will open with the list of interaction records matching your search criteria. Each row of the displayed table describes a single interaction.

Search results

Note that an interaction may have multiple segments (e.g., when a call was handled by multiple agents). The number of segments in a call is shown in the *Segments* column. You can see details for each segment of a selected call by clicking that number.

Some columns show data that is media-type specific (e.g., *Case ID Subject* is only relevant for emails). You can adjust the format of your table to display only the columns for the data that you need. To remove columns, hover over any column header, open the drop-down menu, and unselect the columns for the data you do not need.
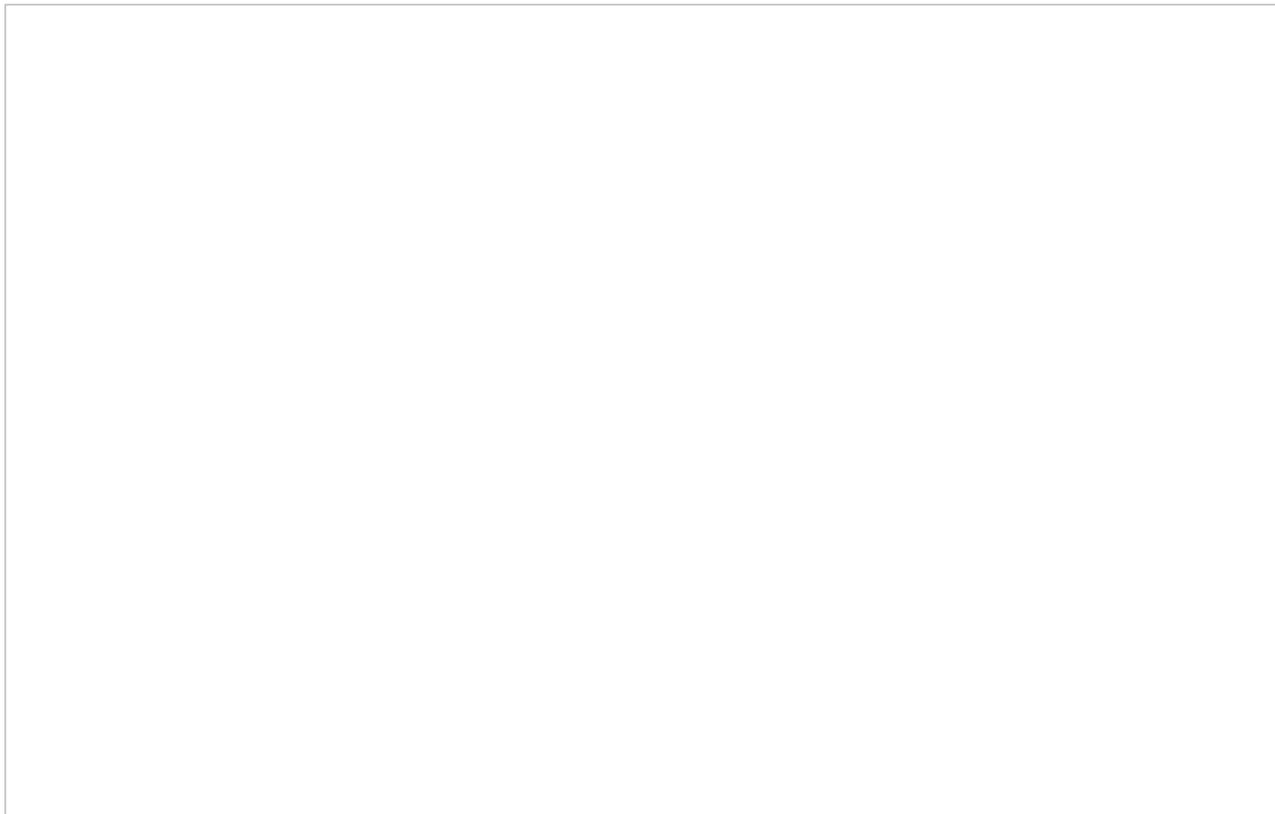
You can download all records that appear in the Search Results page in the .CSV format. To export the records, click the **export** button at the bottom of the page.

You can also manually download email content, call recordings, and call progress analysis (CPA) recordings for the interactions shown in the *Search Results* page. Note that manual download is limited to up to 100 emails, 100 call recordings, and 500 CPA recordings, respectively.

Periodic automated export of call/CPA recordings is configured via *Services and Campaigns > Results Tab* of the Contact Center Administrator application.

Erasing Interaction Content

The *Erase* feature for an interaction record allows you to remove the content of the record (i.e., voice recording and/or transcript for a call, the transcript for a chat, message body for an email, etc.), which may be necessary in order to comply with privacy laws or security standards. When taking this action, note that you can delete the content of one interaction at a time. For bulk erasure of interaction content, see the *Contact Center Administrator Guide*, section Results Tab > Interactions Erasing.

An interaction record with the option to erase it

How to Erase Interaction Content

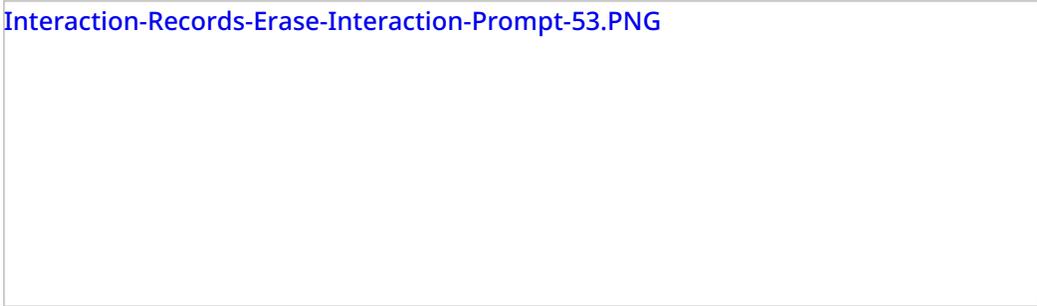To erase content of a single interaction, take the following steps:

1. Configure the desired criteria for your records search and find the desired interaction record.
2. Open the record for review by clicking it's content item.
3. At the bottom of the record, select the **Erase** button; this will pop the *Erase interaction* window

Interaction-Records-Erase-Window-1-53.PNG

4. Select **Items to erase**, which displays the type of content you wish to erase (e.g., a voice recording, a transcript, or both)
5. Fill in the mandatory **Reason** field; this allows you to provide a reason the content was erased.
6. Select the **Erase** button and you will see a new prompt, warning you that erasing the interaction is permanent.

Interaction-Records-Erase-Interaction-Prompt-53.PNG

7. Select the **Erase** button again and the interaction will be permanently erased. Note that for email interactions, the *Erase* function erases content of one email message at a time. For other media types (voice, chat), the content of the entire interaction will be erased at once, regardless of the number of interaction segments.

Note that in the interaction window, if you select the segment that was erased, a message will display the time, date, user, and reason the interaction was erased.

Interaction-Records-Erased-Interaction-Message-53.PNG

Call Detail Report

The *Call Detail* report provides detailed records of interactions in chronological order. A combination of filters *From Phone*, *Original Destination Phone*, and *Connected To Phone* allows you to request this report for interactions that originated from specific phone numbers, were made to specific service numbers, and were connected to specific phone numbers. The report does not include unanswered call attempts made by the Dialer for predictive/progressive campaigns; such attempts are reported via [campaign results](). For manual outbound calls, a Call Detail report is created for any call attempts that reached the carrier network (i.e., where the INVITE request was actually sent to a SIP trunk).

Note: This report provides records for voice and chat interactions only. Email interaction records appear in the [Email Detail Report]().
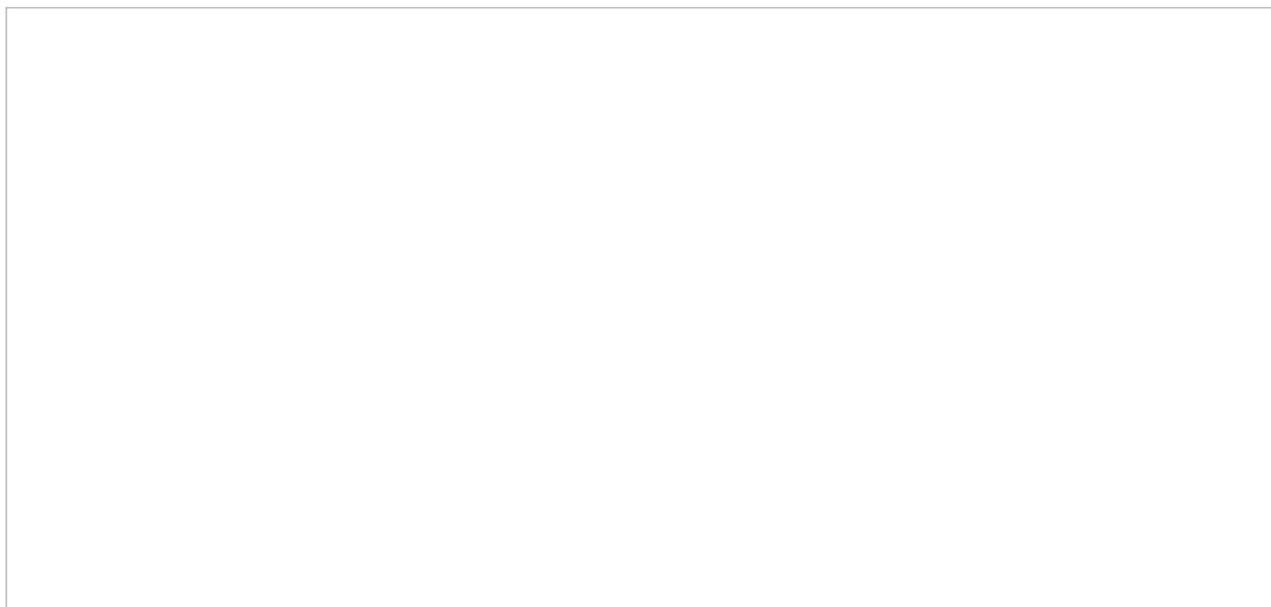
The Call Detail report provides detailed records of call interactions

Metric Descriptions

The metrics of this report are organized into columns, which are described as follows.

Agent disposition

The [Disposition]() assigned to this interaction by the agent

Co-browse

Indicates whether any co-browsing sessions took place during this interaction. Currently works for [co-browsing with Surfly]() only.

Connected To

The name (if known) of the party that answered the call/chat

Connected To

For calls, the phone number of the destination where the call was answered

Date

- For inbound interactions, the date when the interaction entered the system
- For internal and outbound calls, the date when the call was initiated

Dialing/Ringing

- For inbound calls, the duration of the call ringing phase from the moment the call was distributed to an extension and until it was either answered or abandoned
- For internal and outbound calls, the duration of the call dialing phase from the moment the dialed number was received by the system and until the call was either answered or abandoned

Disposition

Disposition provides information about how the interaction ended. *Disposition* can be one of the following:

- *Caller Terminated*: Call/chat was terminated by the calling party (after the call was answered)
- *Callee Terminated*: Call/chat was terminated by the called party
- *Rejected/Busy*: Outbound call did not complete because the destination was busy or did not answer within a timeout
- *Network Busy*: Outbound call did not complete because of the network congestion
- *System Disconnected*: Call/chat was disconnected by the system
- *Abandoned in IVR*: Call was terminated by the caller while in the IVR application
- *Abandoned in queue*: Call/chat was terminated by the caller while waiting in queue; to distinguish normal abandoned calls from short-abandoned, use field *In SL* below
- *Abandoned ringing*: Call/chat was terminated by the caller after it was distributed to an agent and before it was answered (or before the [No Answer timeout](#) expired)
- *No Answer*: Call/chat was terminated while ringing after *No Answer time-out* expired (i.e., without being routed anywhere else)
- *Transferred by XXXX*: Interaction was transferred to another party by extension XXXX
- *Continued:* Participation of the "From" party on this call/chat, being part of a conference, ended, but the interaction between the remaining participants of the conference continued (such call will be shown as a subsequent record)
- *Self Service:* Processing of the call was finished by the IVR application and the requested service was provided (as indicated by execution of scenario block *Self-Service Provided*)

Duration

For calls and chats, the total duration of the interaction from the moment it entered the system or was initiated and until it was released.

Note that transferred interactions produce a separate record for each transfer segment, where each record shows duration of the corresponding segment.

From

The address from which the interaction originated

- For inbound calls, the Caller ID
- For outbound and internal calls, the extension from which the call was dialed
- For chats, the IP address of the originating computer

Global ID

The [Global interaction identifier](#)

Held

The number of times the call was placed on hold (for emails and chats, the number of times the chat interaction was out of focus)

Hold

The total time the call spent on hold. For chats, the total out-of-focus time (the time the interaction spent at the agents' desktops, excluding the *Talk* time.)

In SL

In SL indicates whether this interaction was answered within the service level threshold [configured for the associated service](#).

Possible values: *Yes*, *No*, and empty string.

Note that this field will also be set to *Yes* for short-abandoned calls. Such calls will have the *Disposition* field set to *Abandoned in queue*.

IVR

The amount of time that this call spent in IVR

Max Hold

The duration of the longest period the call was on hold

Media Type

The interaction media type, which can be either VOICE or CHAT

Notes

The free-text notes provided by the agent for this interaction

Original Destination

The original destination of the interaction

- For inbound calls, the number originally dialed by the caller
- For chats, the name of the Messaging scenario entry

Queue time

The amount of time that this interaction spent in the service queue

Scenario

The name of the first scenario that was used to process this interaction

Service/Campaign

The name of the service or campaign associated with this interaction

If the interaction was recategorized or transferred to a different service, each such event will produce a new record with a new service name.

Talk

The total call talk time, excluding hold time. For chats, the total in-focus time (the time the interaction was selected in the active communications lists of the agents who processed it.)

Time

- For inbound interactions, the time when the interaction entered the system
- For internal and outbound calls, the time when the call was initiated

Transferred From

In case this interaction originated by way of transfer, *Transferred from* refers to the extension from which this interaction was transferred.

Type

The call type, which can be one of the following:

- *Inbound*
- *Inbound Chat*
- *Outbound*
- *Internal*
- *External* (a call where all parties are external)

Wrap-up time

The amount of time the agents spent doing after-call work related to this interaction

Agent Metrics View

Agent metrics are displayed in the Supervision ☐ section of Agent Desktop and displayed at the bottom of the Context Information Area. Agents are listed in alphabetical order and by default, this view will show only the agents who are currently logged in to Agent Desktop. If you wish to see the current day's metrics for the agents who are logged out, select the **logged-out users** checkbox. For a list and definitions of all agent metrics, see [List of Agent Metrics](#).

All Teams Agents

If you have been assigned to supervise more than one team, and if you have the privilege "All assigned teams combined view," then you may see metrics for all agents at once. Not only does this view show agents from all teams assigned to the logged in supervisor, the *All Teams Agents* view shows all services that the teams are assigned to (note that individual services can be hidden, if needed).
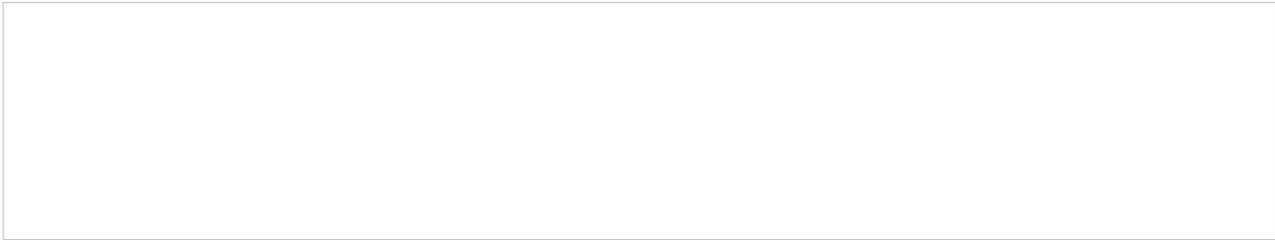
All Teams agents view

The number of agents on display is limited to 100. This is a contact center-specific limit that may be adjusted by your service provider. Note that your ability to see agents from all assigned teams is controlled by your service provider. See your service provider for more information.

Individual Teams Agents

To view agent metrics from an individual team you have been assigned to supervise, select the desired team from [Teams](#) and agents from this team will be shown at the bottom of the Context Information Area. The default view will show only agents currently logged in.
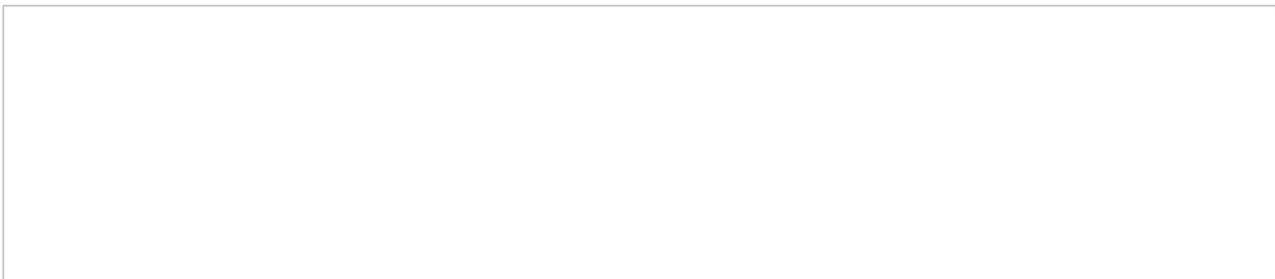
A view of agent metrics from the Customer Service team

Subteams

A subteam is a subset of agents from an individual team that is assigned to a supervisor. In Agent Desktop, a user who has been granted the supervision privilege *Define/View subteams of selected agents* can select agents from a larger team to be on a subteam. Supervisors may also switch between subteam view and full team view in order to focus their attention on real-time metrics for specific agents within a large group. In addition, supervisors with such privilege may request agent reports for selected agents, as well as send internal chat broadcasts to agents in selected subteams or teams. This capability makes it easier for supervisors to monitor and track a specific range of agents on a team.

Viewing Subteams

A supervisor may switch between full team view and subteam view by selecting the *my subteam only* checkbox.
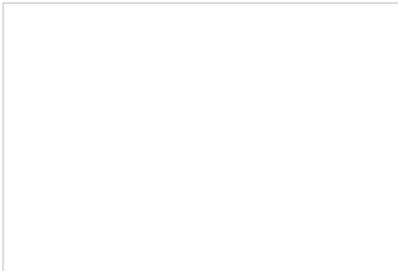
Select the checkbox to view only agent metrics for the subteam
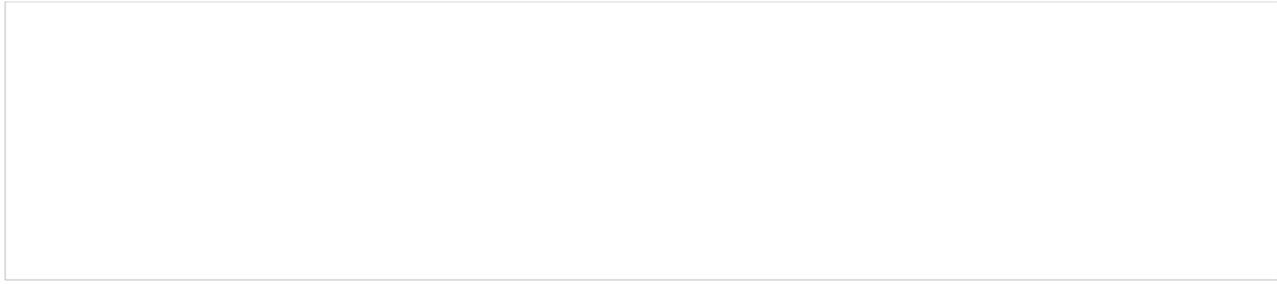
Subteam Editing Mode

A supervisor looking at a team in may switch to Subteam Editing mode by clicking the **pencil icon**, which is next to the *my subteam only* checkbox.

Adding and Removing Agents

Supervisors can select agents using checkboxes from the entire list of agents. The list may show logged out agents if the corresponding *logged out users* checkbox is selected. OK and Cancel buttons appear to enable exit from Subteam Editing mode.

To add agents to a subteam, select the checkbox beside each agent listed on the team. Likewise, to remove agents from a subteam, unselect the checkbox beside each agent listed on the team.

Editing a subteam

See the *Reporting Reference Guide*, section [Agent Activity Report](#), for information on viewing subteam metrics in reports.
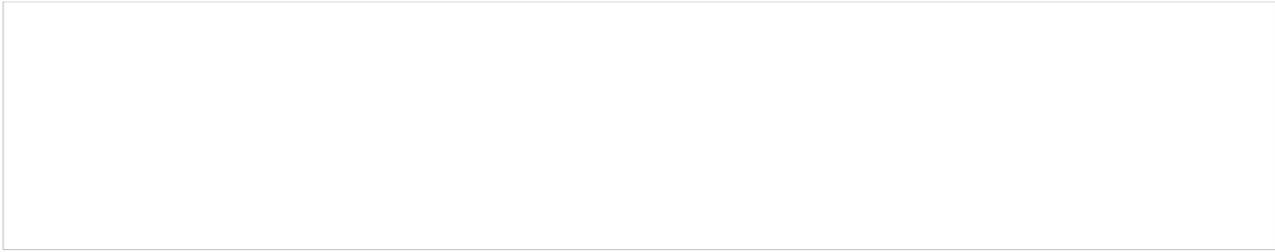
Default Agent Metrics

Upon selecting either [All Teams](#) or an [individual team](#), the following metrics will be displayed for agents:

- Agent state icon
- Agent interaction type
- Name
- Sentiment
- Time in State
- IN Handled
- IN Rejected
- OUT Rejected
- OUT Handled
- Occupancy
- Active
- Interaction
- Service
- Talk
- Hold
- Rec

Additional metrics can be added, [customized](#), arranged as you see fit. For a complete list of agent metrics, see [List of Agent Metrics](#).

Sorting

You can have agents sorted automatically by the value of any currently displayed metric. To sort the metrics, click on the name of the metric; the default sort view is high to low. To sort low by high, click on the metric name again. By default, agents are sorted alphabetically.

A view of metrics as sorted by Time in State

Icons

The current agent state is displayed as an icon next to the agent name. To view the current agent states in text form, select **Agent State** from the list of the available agent metrics. For the *Not Ready* state, the Agent State column will also display the current *Not Ready* reason if such a reason is configured in your system. For detailed descriptions of agent states, see the Bright Pattern Contact Center *Agent Guide*, section Understanding and Handling Your States.

If an agent is handling an interaction, the interaction type is displayed as an icon next to the agent's *Busy* or *After Call Work* state.

The interaction state icons have the following meanings:

- Outbound interaction in progress (dialing, talk or hold)

- Inbound interaction in progress (ringing, talk or hold)

- The customer has disconnected from interaction and the agent is performing After Call Work related to this interaction. Note that this icon is a user state.

- The call is on hold.

- Chat or SMS/MMS interaction in progress

- Email interaction in progress

- The logged in user has no phone.

Note: If your team includes members who are not agents or supervisors, their current status will be displayed using a different set of icons, which simply indicate users' availability to communicate. For detailed descriptions of such non-agent statuses, see the Bright Pattern Contact Center *Agent Guide*, section How to Use the Directory.

Multiple Interactions

Note that an agent may have more than one active interaction on Agent Desktop. If the agent is handling multiple interactions, the displayed value relates to the interaction that is currently in focus at the agents' desktop (i.e., selected in the agent's *Active Communications List*). The number of the agent's current active interactions is reported via the *Active* metric. If this metric shows more than one interaction for a particular agent, clicking on the value of this metric will "unfold" the agent's row into a list showing information about all interactions that are being handled by the given agent.
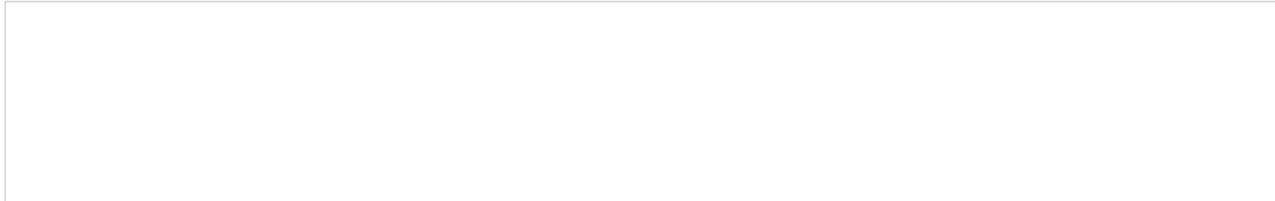
Agent metrics view showing multiple current interactions for one agent

For detailed descriptions of the available agent metrics, see section [List of Agent Metrics](#).

Service Metrics View

Service metrics are located in the Supervision☐ section of Agent Desktop and displayed in the middle of the *Context Information Area*. This view displays metrics for either all services assigned to the selected team or all services assigned to all teams. You may toggle between specific team views and the *All Teams* view.

You can have services sorted automatically by the value of any currently displayed metric. To manually sort the metrics, click on the desired metric name; the default sort view is high to low. By default, services are sorted alphabetically.

The bottom row of the service metrics view displays the cumulative values for all currently displayed services. In the *Name* column, the bottom row shows the total number of currently displayed services. For detailed descriptions of the available service metrics, see section [List of Service Metrics](#). For definitions of all real-time metrics, see [List of All Real-Time Metrics](#) in the *Reporting Reference Guide*.

To learn how to customize service metrics, see *Tutorials for Supervisors*, section [Customizing Metrics](#).
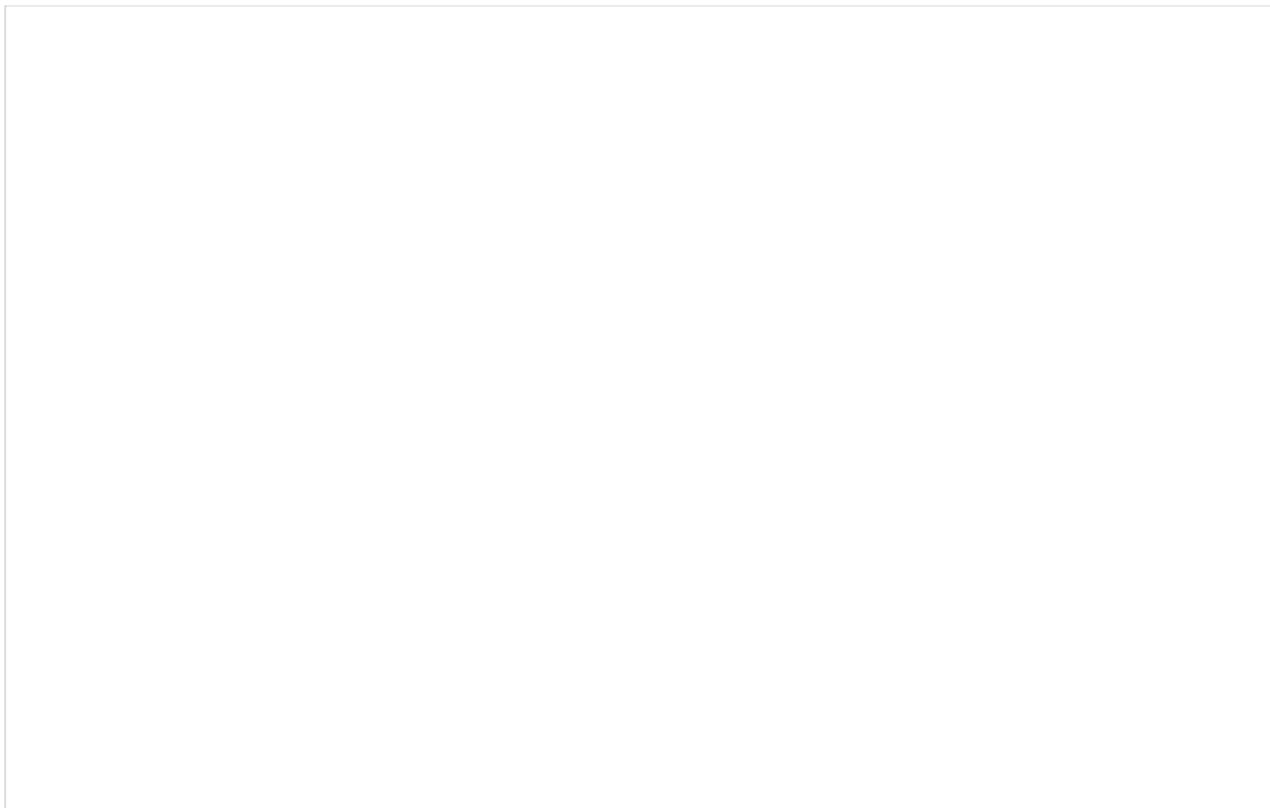
Service Metrics for One Team

To view the service metrics for one team, select the desired team name from the available list of teams located at the top of the Context Information Area. Doing this will cause that team's service metrics to appear in the middle of the Context Information area. For any team selected, the name of the team appears next to the word "Services."
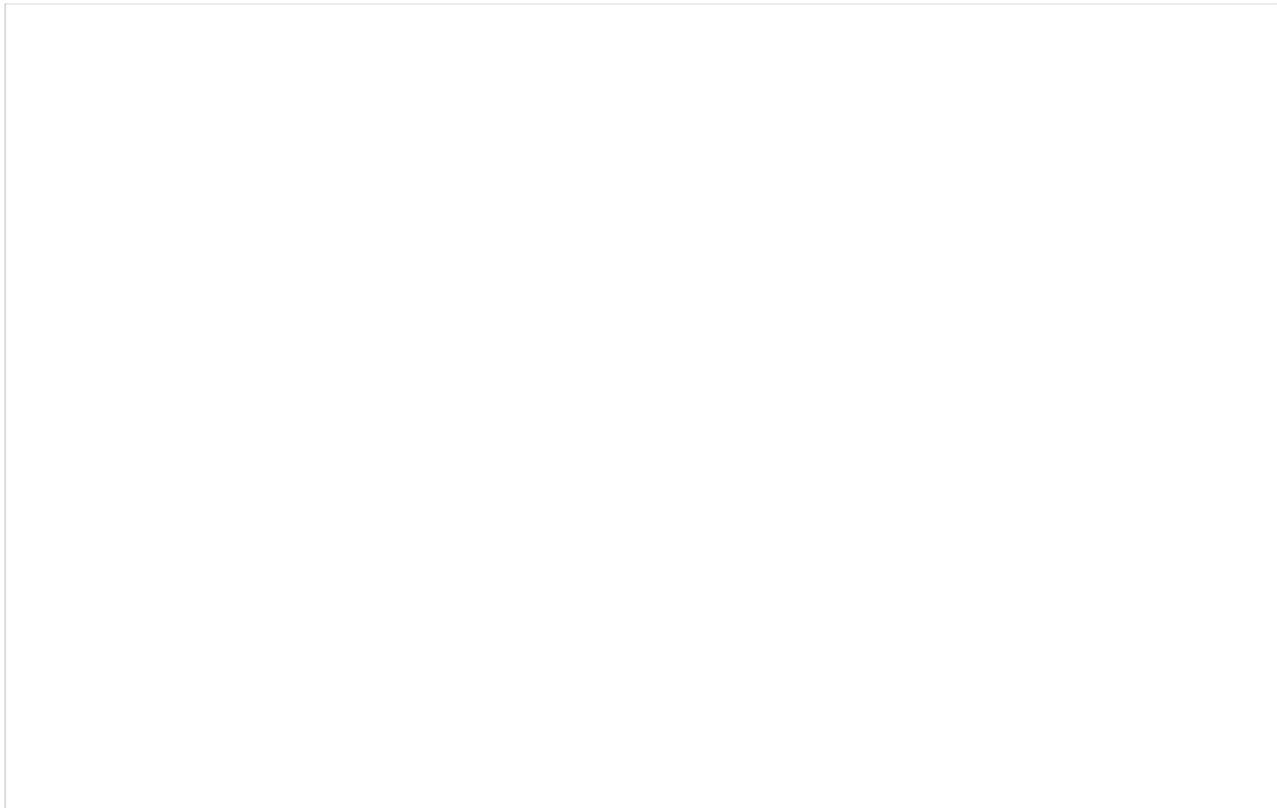
Service metrics displayed here are for the Customer Service team

Service Metrics for All Teams

Selecting **All Teams** from the teams list will display the service metrics for all teams for which the supervisor is assigned to appear in the Context Information area. You can tell, at a glance, that the view includes service metrics for all teams by looking at the view's title, which shows "All Teams" next to the word "Services."

Supervisors may view service metrics for all teams they have permission to supervise

General Campaign Metrics View

General campaign metrics are displayed in a table in the upper section of the right pane of your Agent Desktop. This general campaign metric view will list, in alphabetical order, all active campaigns assigned to you.

The current status of each campaign is indicated in the *Running* column.

The mode in which the campaign is configured to run is indicated in the *Mode* column.
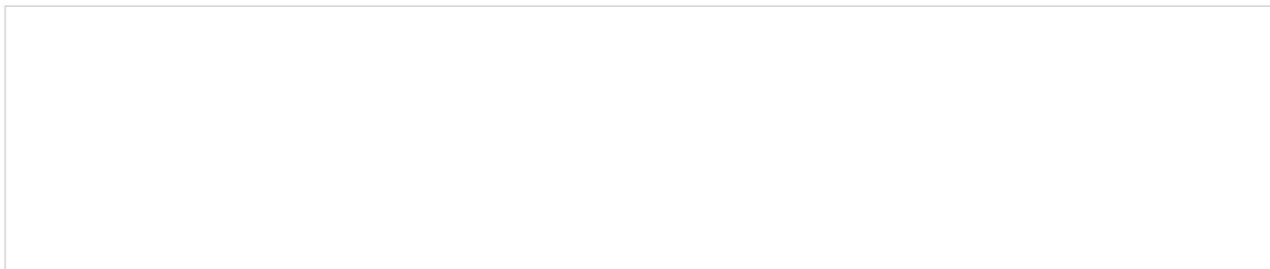
General campaign metrics view

A campaign can run in one of the following modes:

- **Preview** - The calling records are submitted to the agents participating in the campaign. The agents are given a chance to review record information before dialing the destination numbers.

- **Predictive** - 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.

- **Progressive** - 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. Note that progressive mode is also used for a short period of time at the beginning of campaigns of the *Predictive* type (see above) until the system has enough real-time statistical input to enable the predictive algorithm.

- **Automatic (IVR)** - The system automatically dials numbers from list records, monitors call progress, and connects successful (answered) call attempts to a prerecorded IVR message. Agents are not involved in campaigns of this type.

More Information

For general information about real-time metrics, see section [Understanding Real-Time Metrics](#).

For view customization, see section [Customization of Metric Views](#).

For detailed descriptions of the available campaign metrics, see [List of Campaign Metrics](#).

API Reference

Bright Pattern uses Postman to host documentation for Bright Pattern Contact Center REST APIs.

Postman is a popular REST API client for testing and documenting APIs with examples in multiple programming languages. To view documentation hosted on Postman, simply click the **Get APIs** button for the desired API specification, and you will be redirected to Postman's website. From there, you have the option to run the API collection in the Postman application in your own environment.

Note that JavaScript API documentation is available only on help.brightpattern.com (see the links shown on this page).

Agent Desktop APIs

Access Agent Desktop functions using JavaScript; control agent states and handle calls from .NET-based applications.

[Get APIs](#)

- [Desktop Integration API .NET Version Tutorial](#)
- [Simplified Desktop .NET API Specification](#)
- [Desktop JavaScript API Specification](#)

Configuration API

Automate user provisioning with third-party systems using the Configuration API.

[Get APIs](#)

- [Configuration API (on Postman)](#)

Embedded Desktop API

The Embedded Agent Desktop API allows you to use Agent Desktop directly from your webpage.

[Get APIs](#)

- [Embedded Agent Desktop API](#)

Interaction Content API

Download recording audio files along with their associated metadata with the Interaction Content API.

[Get APIs](#)

- [Interaction Content API (on Postman)](#)

List Management API

Manage the contents of outbound calling lists and Do Not Call lists via third-party applications.

[Get APIs](#)

- [List Management API (on Postman)](#)

Chat/Mobile App APIs

Develop customer-facing mobile/web apps for advanced chat, voice, and video communications.

[Get APIs](#)

- [Mobile API Plug-in for Appery.io Tutorial](#)
- [Mobile/Web API (on Postman)](#)

SCIM-Compliant User Provisioning API

Communicate user identity data between identity providers and service providers.

[Get APIs](#)

- [SCIM-Compliant User Provisioning API Specification (on Postman)](#)

SMS/MMS API

Send and receive SMS and MMS messages, as well as track delivery status with the SMS/MMS API.

[Get APIs](#)

- [SMS/MMS API Specification (on Postman)](#)

Statistics API

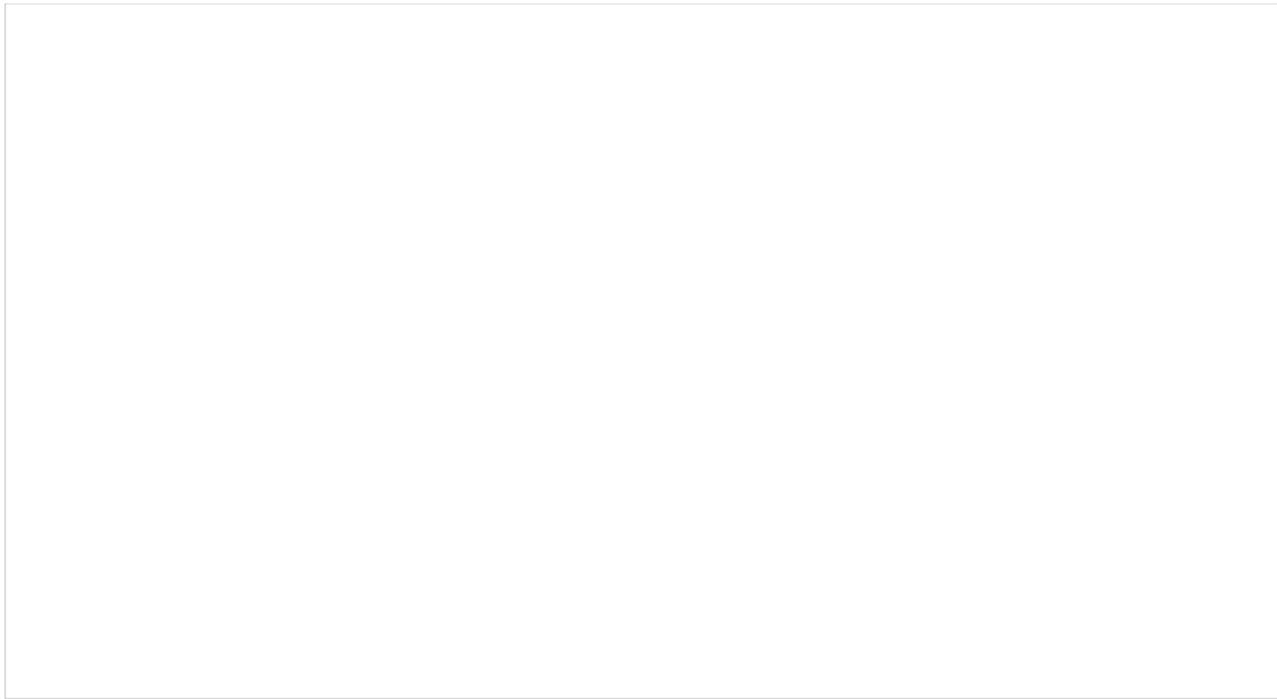Work with subscriptions, real-time statistics, dispositions, and more with the Real-Time Statistics API.

[Get APIs](#)

- [Real-Time Statistics API (on Postman)](#)
- [List of Statistics](#)

1. REDIRECT [5.3:Contact-center-administrator-guide/Directory/StaticEntries](#)

1. REDIRECT [5.3:Contact-center-administrator-guide/UsersandTeams/Users](#)

1. REDIRECT [5.3:Contact-center-administrator-guide/Directory/Softphones](#)

1. REDIRECT [5.3:Contact-center-administrator-guide/UsersandTeams/Users](#)

1. REDIRECT [5.3:Contact-center-administrator-guide/UsersandTeams/HelpScreens](#)

1. REDIRECT [5.3:Contact-center-administrator-guide/Security/AuditLog](#)

Call Recordings

Interaction records that are associated with call recordings are displayed with an audio icon. By clicking the icon, you can listen to a call recording and review any agent-provided notes associated with the call. Call recordings are useful for supervisors, for example, who may wish to review agent calls, evaluate agent performance, and save agent ratings.

Recording playback and grading

Listening to Call Recordings

To listen to a call recording, proceed through the following steps.

Step 1: Click [ ] and play the recording.

- The audio icon appears next to the corresponding interaction record. The *Review Call Recording* page will open with standard audio controls.

- Note that Depending on the type of media player used, the audio controls may appear only when you hover over the *Conversation recording* area. When using the *Review Call Recording* function for the first time in your browser, you may need to install the media player plug-in (extension). Also, depending on the internet security settings of your browser application, you may need to confirm your permission to use the media player on this page.

- If the agent entered a disposition or provided any free-form notes for this call, those items will be displayed on the *Review Call Recording* page as well.

- Click the play button to listen to the recording.

Step 2: Grade agent performance and comment.

If any categories for agent performance evaluation have been defined in your contact center configuration, you can grade the agent performance during the selected call on a scale of one to nine in any of those categories. You can also enter some free-form comments about this call recording.

Click the **Rate** button to save the data you have entered. Your grades and comments for this call recording will be stored and made available to other users who may subsequently review this call record.

Note that the same call recording is provided for all call segments, but you can grade performance of each agent who handled the call separately. Use the **next** and **previous** buttons to navigate between segments. Absence of any call grading categories on the *Review Call Recording* page for a particular call segment means that during that segment the call was connected to an IVR application.

Step 3: Save recordings and associated grades/notes.

- To download the grades, reviewer's notes, and the recording to your computer, click **Save As**.

- To share a link to the call recording with other reviewers, click **Copy link to share**. The link to this page will be copied to the clipboard. You can then paste this link to an email or text message to other people in your organization.

Note that in order to access the recording these people must have [privilege](#) *Listen to call recordings and chat transcripts*.