5.3 Teams

Bright Pattern Documentation

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About Omni QM

Bright Pattern Contact Center Omni QM is a suite of advanced quality management tools designed to facilitate the process of assessing and improving the quality of agent communications across media channels.

Omni QM builds upon Bright Pattern's existing quality management functionality by introducing advanced quality management features, such as the ability to design evaluation forms, determine an evaluation process, have agents conduct self-evaluations, assign agent score, conduct calibrations for the purpose of improving the evaluation process, and much more.

In addition, Omni QM unifies quality management processes by placing all quality management features into a single application. When Omni QM is enabled, all interaction records, interaction search functions, evaluation forms, and other quality management tools are accessed via an evaluation console built into the Agent Desktop application. This means that supervisors no longer have to visit the Contact Center Administrator application to access interaction records and grade them; instead, supervisors can monitor, search, review, and evaluate their team's interactions without ever leaving Agent Desktop. Moreover, agents can easily view their own interactions, evaluations, and quality score from Agent Desktop. Omni QM gives users a bird's eye view of interaction quality across all channels and services.

Omni QM is a feature option that is built in to Bright Pattern Contact Center, enabled as part of your organization's contract.

What Is Quality and Quality Management?

In the contact center space, where customer satisfaction determines the success of customer service, we can define *quality* as consistency in customer service delivery, communications, knowledge of product/service, employee performance, technology, and resources.

Customers expect to receive the same level of care from any agent they interact with and on any channel in which they reached your business. We can meet this expectation for consistency by using quality management processes and tools.

Quality management helps contact centers to meet customer requirements, make all efforts to exceed customer expectations, facilitate agent development, ensure consistency of quality of provided services, and provide a path to achieve it all.

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Web Screen Pop

This block specifies what to display for the agent when the interaction is connected to this agent through the [Connect Call](#) or [Connect Chat](#) block.
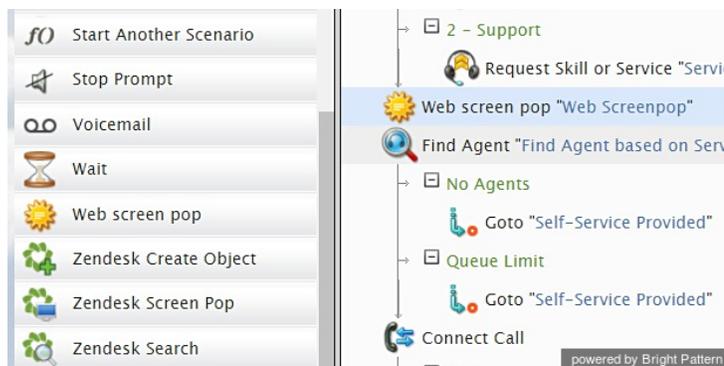
Note that services may also have [activity forms](#) associated with them. If an interaction is associated with a service that has a configured activity form, both the activity form and the content specified in this block will appear in the [tabs of the Agent Desktop](#). To specify which content shall appear in the active tab, use option **Display activity form before/after web screen pop(s)** of the [Activity tab](#) of the given service.

Note also that by default, specified screen pop content will be displayed in the [Context Information Area](#) of the Agent Desktop. This area is not shown when Agent Desktop is run minimized using the [Pop-out function](#). Thus, when using web screen pop, consider one of the following options:

- Open screen pop in a separate window/tab (see setting **Open in popup window**)
- Disabling agents' [privilege](#) **Force pop-out phone window**

For an example of how to use the Web Screen Pop block in a scenario, see [How to Create a Chat Scenario That Pops Case or Contact Information](#).

Settings

Title text

Title text is the name of the instance of the block. Enter a name in the text field and click the **Update** button at the bottom of the *Edit* pane. The new name of the block appears in the flowchart.

Label

The *Label* field is where you may enter a separate, customer-facing name for the URL.

Open in popup window

This indicates whether screen pop should appear in the [Context Information Area](#) of the Agent Desktop application (default) or in a separate window.

Keep open when interaction is finished

When selected, this option keeps open the pop-out browser tab when the interaction is finished. Note that this option is not available for selection unless *Open in popup window* is selected.

Pop screen upon answer

By default, the screen pop occurs as soon as the interaction is delivered to the agent (i.e., during the alert phase); select this checkbox if you want the screen pop to occur when the agent accepts the interaction for handling.

Screenpop action

Screenpop action indicates whether the pop-up will open a web page (default) or display text.

URL of the page to open

This specifies the URL of the web page that should be opened if the *Open web page* screen pop action is selected. A query string can be added to supply variables for the screen pop page (e.g., http://www.localhost.com/Webform2.aspx?accountnumber=$(custNum))

Text to display

This specifies the text to be displayed if the **Display text** screen pop action is selected.

Additional URLs

This can be used to specify URLs of optional additional web pages to be opened if the **Open web page** screen pop action is selected.

Web screen pop

Specifies what to show in the window that pops on agent's desktop with the call connected by Connect Call block.

Title text:

☐ Open in popup window

☐ Keep open when interaction is finished

☑ Pop screen upon answer

Screenpop action: ⦿ Open web page ◯ Display text

URL of the page to open:

/agentdesktop/app/cases/identification/identification.html?accountNumber=004

Additional URLs: Google+

SugarCRM

add

General Settings

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

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

General Settings

Default time zone:	-05:00 America/New_York
Default country:	United States
System Not Ready reason names for:	
Agent no answer:	No answer
UI connection loss:	Connection loss
After call break:	After call break
Logout Pending:	Logout Pending
Custom Not Ready reasons:	Away from Desk
	Break
	Lunch
	Not ready
	add
Agent state upon login:	Not ready
Auto logout timeout upon connection loss:	15 seconds
Enter After Call Work:	☑
Exit After Call Work:	☑ automatically after 180 seconds
Enter Break:	☐
Exit Break:	☐ automatically after 120 seconds
Non-call cases URL:	
Display name format:	First name Last name
External number inactivity timeout:	5 minutes
Agent daily Break time limit:	20 minutes
Require service on outbound calls:	☐

Call Center Configuration > General Settings

Screen Properties

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

Default time zone

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

Default country

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

System Not Ready reason names for

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

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

Agent no answer

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

UI connection loss

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

After call break

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

Logout Pending

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

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

Custom Not Ready reasons

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

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

Agent state upon login

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

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

Auto logout timeout upon connection loss

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

Enter After Call Work

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

Exit After Call Work

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

Enter Break

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

Exit Break

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

Non-call cases URL

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

Display name format

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

External number inactivity timeout

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

Agent daily Break time limit

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

Require service on outbound calls

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

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

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