

5.3 Chat Transcripts

Bright Pattern Documentation

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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.

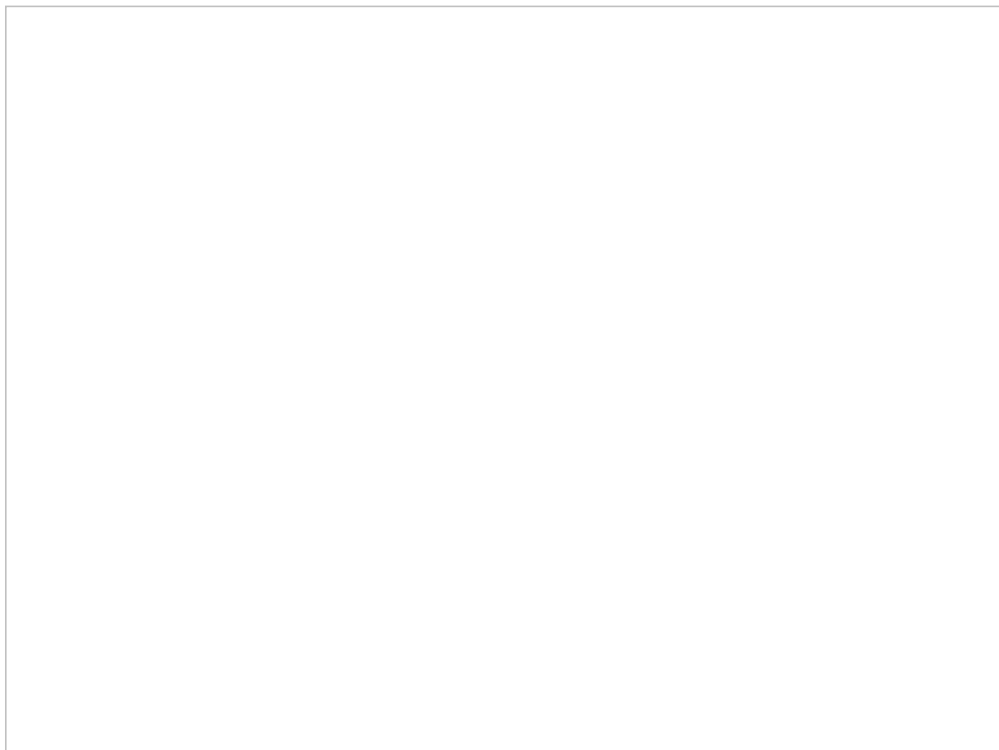
This section offers an overview of the Interaction Records Search feature. For detailed descriptions of search criteria and search results, see sections [List of Interaction Records Search Criteria](#) and [Search Results](#).

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

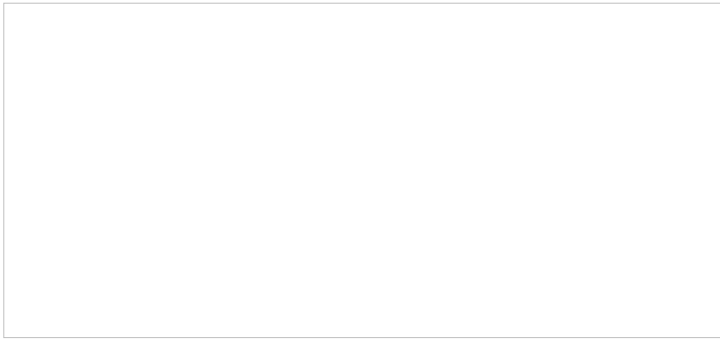
Your search criteria can have any number of [conditions](#) (i.e., search criteria). To add a condition to your search, click **add condition**. To edit or delete an existing condition, use the mouse-over operation.



Interaction records search

Saving Search Conditions

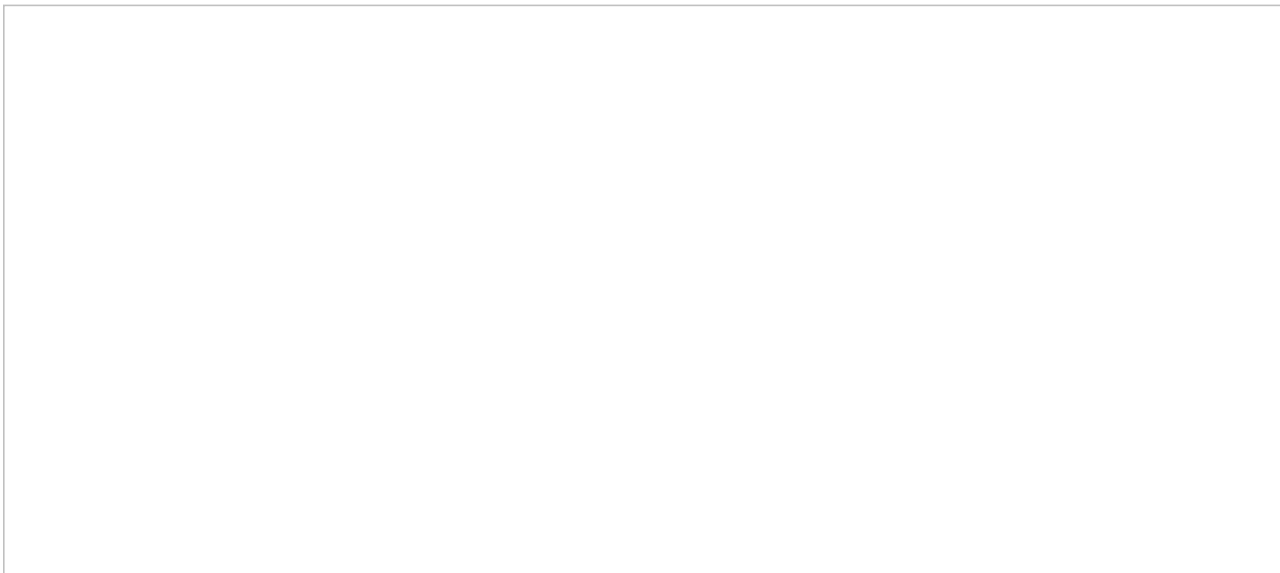
You can save a set of search conditions for future use--a helpful capability for when you regularly run the same searches and you do not want to add conditions manually each time you search. To save a set of search conditions, click **Save** and assign a name to it. To use a previously saved set of search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

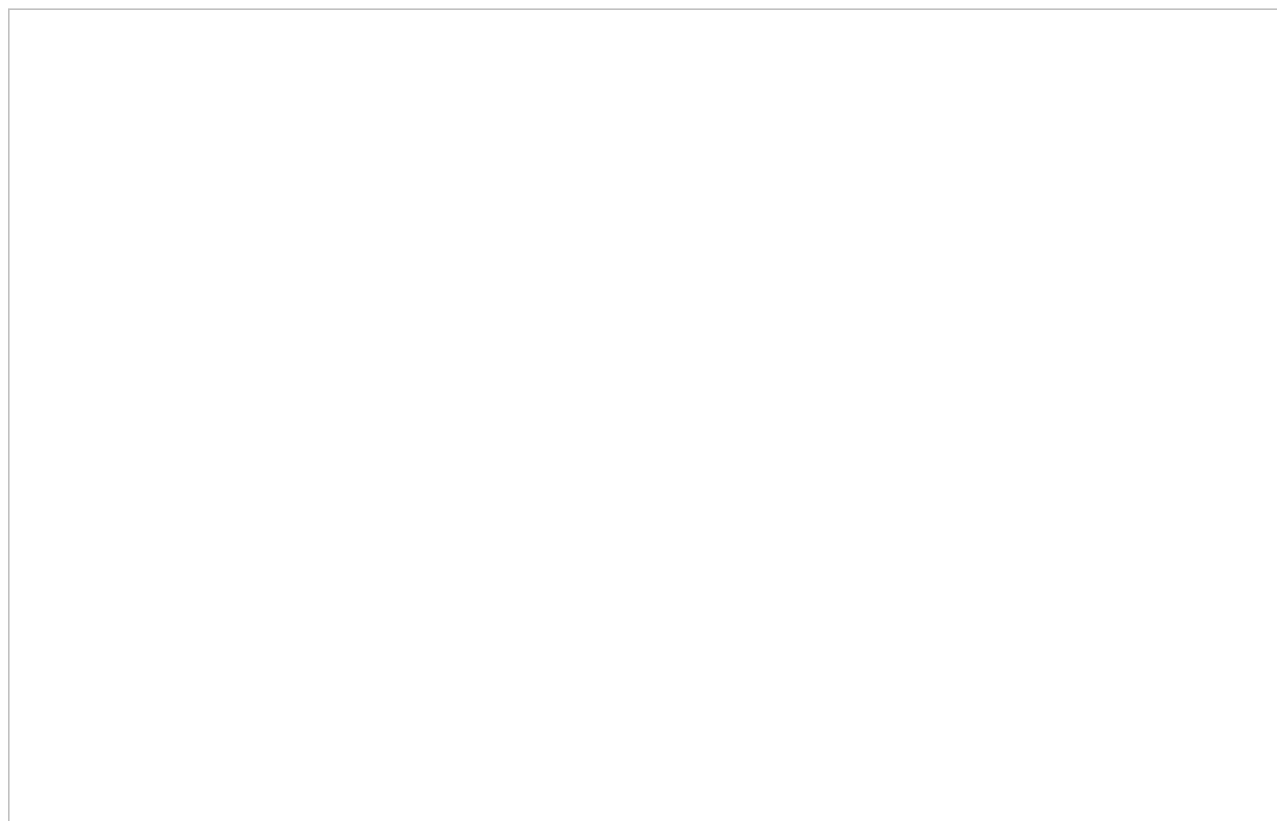
You can download all records that appear in the Search Results page in the .CSV format. To export the records, click the **export** button at the bottom of the page.

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 its 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](#)

A screenshot of a software window titled "Interaction-Records-Erase-Window-1-53.PNG". The window is currently empty, showing only a white background with a thin black border.

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](#)

A screenshot of a software window titled "Interaction-Records-Erase-Interaction-Prompt-53.PNG". The window is currently empty, showing only a white background with a thin black border.

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.

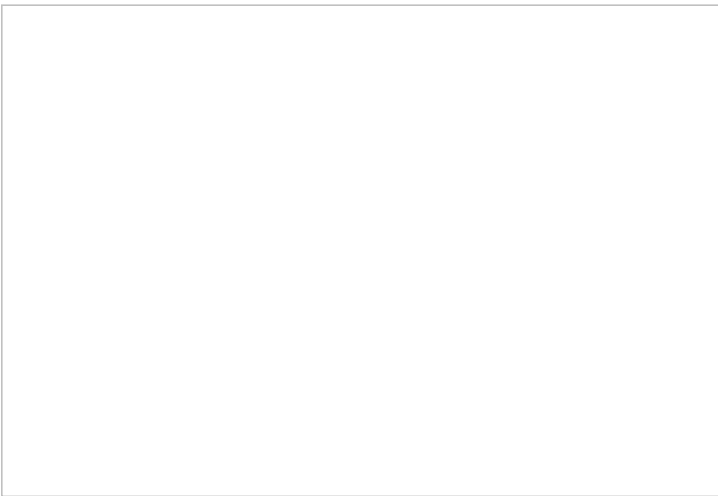
Note that in the interaction window, if you select the segment that was erased, a message will display the time, date, user, and reason the interaction was erased.

[Interaction-Records-Erased-Interaction-Message-53.PNG](#)



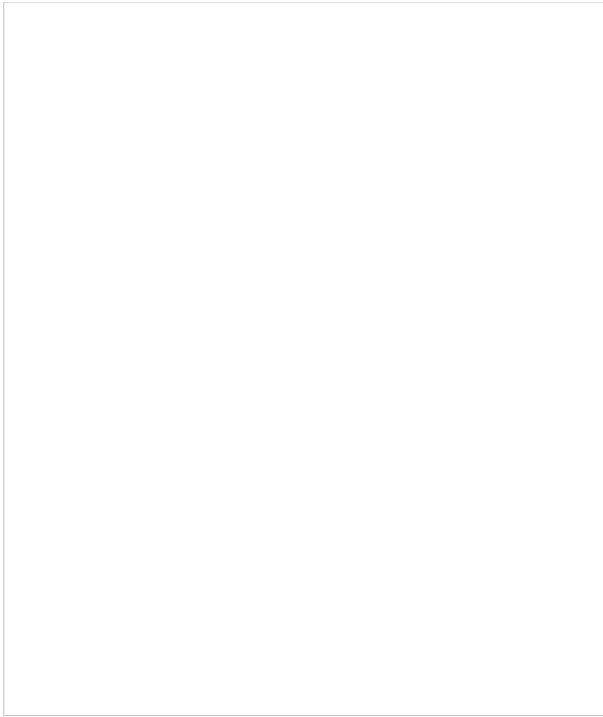
Search Criteria

[Interaction records searches](#) may be narrowed down with specific search criteria. If, for example, you wish to search for interaction records pertaining to one agent only, you may add the *agent* condition to your search, specifying the agent's name, in order to view interaction records search results for just that agent.



Click "add condition" to view available search criteria

The criteria for such searches are listed in a drop-down menu that appears when you click **add condition**.



Select the conditions of your search

Search Criteria Descriptions

The criteria for such searches are described in the order in which they appear in the drop-down menu on the *Interaction Records > Search* page. Note that the criteria shown in the drop-down menu will depend on the media type (i.e., voice, chat, email) that you select for your search. **Please note:** Some criteria are not available to users with [BPO client privileges](#) only; these criteria will be marked with an asterisk (*).

KM template used *

KM template used (where "KM" refers to "Knowledge Management") returns records of interactions where any [Knowledge Base](#) article was used. Note that *KM template used* applies to text-based interactions only. This criterion is not available to users who only have BPO client privileges.

account number

account number returns call attempts made with respect to the [calling list](#) record that contains the specified value in the field of the *account number* type.

agent *

agent returns records of interactions handled by the agent with the specified username. This criterion is not available to users who only have BPO client privileges.

case ID *

case ID returns records of email interactions associated with the specified [case](#). This criteria is not available to users who only have BPO client privileges.

connected to *

connected to returns records of calls answered at the specified phone number. This criterion is not available to users who only have BPO client privileges.

direction

direction can be used to limit the search to incoming, outgoing, or internal interactions only. Note that not all directions apply to all media types.

disposition

disposition returns records of interactions that were processed with the specified disposition.

duration

duration returns records of interactions whose overall duration was greater than or less than the specified value.

ended after

ended after returns records of interactions whose processing ended after the specified date and time.

ended before

ended before returns records of interactions whose processing ended before the specified the date and time.

first name *

first name returns records of interactions handled by agents with the specified first name. This criterion is not available to users who only have BPO client privileges.

from

from returns records of interactions originated from the specified address.

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

global interaction_id

global interaction_id returns interaction record(s) with the specified [Global interaction identifier](#).

has call problem *

has call problem is used to search for calls that were marked by agents as [calls with quality problems](#). You can select a particular type of problem or set it to *any* to get all records with quality problems of any kind. This criterion is not available to users who only have BPO client privileges.

has recording

has recording returns records of calls that have voice recordings available for playback in the system. This search condition does not return records of calls whose recordings were deleted due to the data storage limits imposed by your service provider.

has screen recording *

has screen recording returns records of calls that have screen recordings available for playback in the system. This search condition does not return records of calls whose recordings were deleted due to the data storage limits imposed by your service provider. This criterion is not available to users who only have BPO client privileges.

has voice signature

has voice signature returns records of calls during which a voice signature was collected from the customer. This search condition returns records of calls whose recordings were deleted due to the data storage limits imposed by your service provider. Assuming that you had those recordings exported and stored externally, you can use details of such records (e.g., *GIID*) to look for those recordings in your external storage.

in email subject *

in email subject returns records of all email interactions containing the specified text in their subject. This criterion is not available to users who only have BPO client privileges.

last name *

last name returns records of interactions handled by agents with the specified last name. This criterion is not available to users who only have BPO client privileges.

my_custom_field *

my_custom_field allows you to specify the value of a field to filter interactions. This criterion is not available to users who only have BPO client privileges.

no KM template used *

no KM template used (where "KM" refers to "Knowledge Management") returns records of interactions where no [Knowledge Base](#) articles were used. This search condition applies to text-based interactions only. This criterion is not available to users who only have BPO client privileges.

sentiment as float *

sentiment as float is the average values of sentiments for interactions. This can be calculated if a tenant has [Natural Language Understanding \(NLU\)](#) integration account configured and set for services. If administrators use this criterion, they can find interaction with negative or positive sentiments. For example, searching for a value of "< - 0.5" will yield negative sentiment results or searching for a value of "> 0.75" will yield positive sentiment results. This criterion is not available to users who only have BPO client privileges.

service

service returns records of interactions associated with the specified service.

specific KM template used *

specific KM template used returns records of interactions where the specified [Knowledge Base](#) article was used. This search condition applies to text-based interactions only. This criterion is not available to users who only have BPO client privileges.

started after

started after returns records of interactions that were originated or received after the specified date and time.

started before

started before returns records of interactions that were originated or received before the specified the date and time.

text search *

text search can be selected as a search condition in order to enable interaction records (voice and chat only) to be fetched according to results of Full Text Search for a [Patterns](#) report. A text index is created for *chat_transcripts.messages.msg* if *chat_transcripts.messages.event = "party_message"*. This criteria is not available to users who only have BPO client privileges.

thread ID *

thread ID returns records of email interactions associated with the specified [email thread](#). This criteria is not available to users who only have BPO client privileges.

to

to returns records of interactions sent to the specified original destination.

- For inbound calls, *to* returns the number originally dialed by the caller.
- For chats, *to* returns name of the [messaging/chat scenario entry](#).

was flagged *

was flagged returns records of interactions that were [flagged](#). This criteria is not available to users who only have BPO client privileges.

was transferred

was transferred returns records of interactions that were transferred.

Save As icon

Copy link to share

Export chat transcript > Save As

Edit icon

Setting up the web chat scenario

1. REDIRECT [5.3:Scenario-builder-reference-guide/ScenarioBlocks/RequestInput](#)

Add Variable blocks to the Request Input block

Chat survey for the customer to complete

The second set of Variable blocks

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

Specify a server in SMTP configuration settings

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

Chat transcript template properties

Feedback survey

The chat transcript emailed to the customer