5.3 Services

Bright Pattern Documentation

Generated: 11/28/2021 6:19 am

Table of Contents

Table of Contents 2
Chat Service Configuration 3
Prerequisites 3
Procedure 3
Step 1: Create and configure a chat service 3
Step 2: Assign teams to the service 4
Step 3: Create additional skills and assign them 5
Step 4: Specify service level thresholds 5
Step 5: Create the scenario for the service 6
Step 6: Add a chat scenario entry to associate the scenario and service with chat 7
Step 7: Configure SMS/MMS access numbers 8
Step 8: Update omnichannel routing settings 8
Service Configuration Quickstarts 9
How to Configure Email Services 9
Prerequisites 9
Procedure 9
Step 1: Create and configure an email service 9
Step 2: Assign teams to the service 11
Step 3: Give agents the privilege to handle email 11
Step 4: Create an email scenario entry and establish account for incoming email 12
Step 5: Configure an outbound email account (optional) 13
Step 6: Create a standard acknowledgment message 14
Step 7: Define service settings 15
Step 8: Create the header and footer 17
Step 9: Specify omnichannel settings for emails 18
Inbound Voice Service Configuration 19
Prerequisites 19
Procedure 19
Step 1: Create and configure an inbound voice service 19
Step 2: Assign teams to the service 20
Step 3: Create additional skills and assign them 20
Step 4: Create the scenario for the service 21
Step 5: Associate the scenario with a service 22
Step 6: Specify service level thresholds 23
Step 7: Specify dial-out information 23
Step 8: Set up periodic call recording exports 24
Step 9: Configure caller ID 25
= Step 10: Customize historical reports 26
Service Configuration Quickstarts 26
Overview 26

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

Chat Service Configuration

This article describes how to configure a general chat service within Bright Pattern's Contact Center Administrator application.

Prerequisites

This article assumes that you have already completed initial configuration for your contact center.

Procedure

Step 1: Create and configure a chat service

1. Log in to Contact Center Administrator, and go to Services and Campaigns.

2. Click the **Add service** (+) button to create a new chat service.

3. Select **chat** as the type of service.

   Choose from the available services

4. In the Properties tab that appears, update the chat service properties, being sure to give the service a unique name (required). At this point, all other properties are optional. For the sake of this procedure, we are going to keep the properties simple, as shown.

Chat service properties

5. Click **Apply** to save your changes.

Step 2: Assign teams to the service

1. In the Assignments tab, assign teams to this service. Note that the service will be created with a default service skill that can be assigned automatically to all members of the associated teams.

Assign users to teams

2. Optionally assign administrators and reviewers to this service.
3. Click **Apply** to save your changes.

Step 3: Create additional skills and assign them

1. Additional skills are called auxiliary skills. In *Call Center Configuration* > *Auxiliary skills*, add any other required agent skills for this chat service.

   You have to add skills before you can assign them

2. In *Users & Teams* > *Skill Levels*, assign auxiliary skills to agents as required skill levels. The higher the numeric value, the more skilled that user is.

   Skills are assigned as percentage values (e.g., "100" or "50")

3. Click **Apply** to save your changes.

Step 4: Specify service level thresholds

1. Go back to *Services & Campaigns* and select the chat service you just created.
2. In the Service Level tab, set the percentage of chats associated with this service that are expected to be answered within a certain amount of time.

Set service level thresholds

Step 5: Create the scenario for the service

1. Go to *Configuration* > *Scenarios* > *Chat* to create the chat scenario for this service.

   Configuration > Scenarios > Chat

2. Either select an existing chat scenario from the list, or click the**Add from template** button at the bottom of the screen to create a new chat scenario from the “Mobile Chat” template.

   Select the "Mobile Chat" template

3. Creating a new chat scenario from a template will open the Scenario Builder application in a new browser tab or window. For the purpose of this simple setup, leave the scenario as-is and click **Save**.

Name the scenario

4. Give the scenario a unique name (e.g., "Sales Chat") and click **Save** again. Your new scenario will appear in the list of scenarios.

Step 6: Add a chat scenario entry to associate the scenario and service with chat

1. Go to *Scenario Entries* > *Messaging/Chat*.

2. Either select an existing chat scenario entry or click the **Add chat scenario entry** (**+**) button to create a new one.

3. If this entry is brand new, the following properties are required right now:

    1. **Name** - Give this entry a unique name.

    2. **Scenario** - Select the chat scenario you previously created.

    3. **Service** - Select the chat service you previously created.

Required properties

4. Click **Apply** to save your changes.

Step 7: Configure SMS/MMS access numbers

1. Still in *Scenario Entries* > *Messaging/Chat* properties, scroll down to **SMS/MMS access numbers**.

2. Click **add**.

3. Select an SMS/MMS access number for inbound SMS/MMS communications. If you do not see any phone numbers, contact your service provider to get SMS enabled.

   Phone number selection

4. Click the green checkmark.

5. Again click **Apply** to save your changes.

Step 8: Update omnichannel routing settings

1. Go to *Call Center Configuration* > *Omnichannel Routing*.

2. Specify the number of sessions that agents can handle simultaneously. The default settings are shown.

Phone number selection

This completes chat service configuration.

Service Configuration Quickstarts

Be sure to read Bright Pattern's other service configuration quickstarts, which will help you to set up bot-assisted chat, voice, and email services for your contact center:

- Inbound Voice Service Configuration
- Outbound Campaign Service Configuration
- Email Service Configuration

How to Configure Email Services

This article describes how to configure email services within Bright Pattern's Contact Center Administrator application.

Prerequisites

This article assumes that you have already completed initial configuration for your contact center.

Procedure

Step 1: Create and configure an email service

In the email service Properties Tab, plan the categorization of email interactions arriving at a particular email address, create the corresponding email services, and configure their general settings.

1. Log in to Contact Center Administrator, and go to *Services and Campaigns*.
2. Click the **Add service** (**+**) button to create a new email service.
3. Select **Email** as the type of service.

   Choose from the available services

4. In the Properties tab that appears, update the service properties.

   Email service properties

5. Click **Apply** to save your changes.

Step 2: Assign teams to the service

1. In the Assignments tab, assign teams to this service. Note that the service will be created with a default service skill that can be assigned automatically to all members of the associated teams.

   Assign users to teams

2. Optionally assign administrators and reviewers to this service.

3. Click **Apply** to save your changes.

Step 3: Give agents the privilege to handle email

In *Users & Teams* > *Roles*, make sure the agents who will process email have the privilege **Handle email** granted to them.

Agent role and privileges

Step 4: Create an email scenario entry and establish account for incoming email

1. In *Scenario Entries* > *Email*, create an email scenario entry for your company's given email address. The scenario entry is the entry point for email service to and from customers.

2. In the scenario entry's **Account** tab, configure incoming email account settings. By configuring account settings, you are enabling your company emails to be opened and used in Agent Desktop.

3. If you do not know your POP/SMTP or Microsoft Exchange information, contact your service provider.

Email scenario entry > Account settings > Incoming mail

Step 5: Configure an outbound email account (optional)

If, within this service, you intend to send outbound emails that are not related to any existing cases, configure an outbound email account for this service.

Outbound email account settings appear in *Scenario Entries* > *[Email](#)* > *Account tab*.

Email scenario entry > Account settings > Outgoing mail

Step 6: Create a standard acknowledgment message

Using Knowledge Base, create the acknowledgment message that will be sent to customers automatically to confirm receipt of their email inquiries.

1. Go to *Call Center Configuration* > *Knowledge Base*.

2. Click the **Add article** (**+**) button to add a new Knowledge Base article.

3. In the **Answer** tab, fill in the email message body as desired. You can use the variable button to insert data variables, as shown in the example.

Add a Knowledge Base article

4. Optionally create additional articles in the [Knowledge Base](#) that will help agents process emails more efficiently.

Step 7: Define service settings

1. In the *Services & Campaigns* > *Email* > *[Email Tab](#)*, define all email-specific service settings.

Email tab properties

2. Beside **Acknowledgment**, click **<<None>>**, which will bring up the acknowledgement message you just created in the Knowledge Base, in step 3.

Select the email acknowledgment message from Knowledge Base

Step 8: Create the header and footer

Go to *Call Center Configuration* > *Email Settings* and update the email header and footer.

This is the system-wide text that will be inserted automatically above and/or below the main text of every email that is sent to a customer. You can include variables to plug in names, email addresses, and so forth.

Create the email header and footer

Step 9: Specify omnichannel settings for emails

Adjust Omnichannel routing settings, which let you specify the number of emails that agents can actively process on their Agent Desktop simultaneously.

Omnichannel routing settings

Inbound Voice Service Configuration

This article describes how to configure inbound voice service within Bright Pattern's Contact Center Administrator application.

For inbound voice services with virtual queuing (callback option), see also Bright Pattern's Virtual Queue Tutorial.

Prerequisites

This article assumes that you have already completed initial configuration for your contact center.

Procedure

Step 1: Create and configure an inbound voice service

1. Log in to Contact Center Administrator, and go to *Services and Campaigns*.

2. Click the **Add service** (**+**) button to create a new inbound voice service.

3. Select **Inbound Voice** as the type of service.

   Choose from the available services

4. In the Properties tab that appears, update the service properties, being sure to give the service a unique name (required). At this point, all other properties are optional. For the sake of this procedure, we are going to keep the properties simple, as shown.

Inbound voice service properties

5. Click **Apply** to save your changes.

Step 2: Assign teams to the service

1. In the Assignments tab, assign teams to this service. Note that the service will be created with a default service skill that can be assigned automatically to all members of the associated teams.

   Assign users to teams

2. Optionally assign administrators and reviewers to this service.

3. Click **Apply** to save your changes.

Step 3: Create additional skills and assign them

1. If necessary, create language skills and any other auxiliary skills that may have to be taken into account when routing calls requesting this service.

You have to add skills before you can assign them

2. In *Users & Teams* > *Skill Levels*, use skill levels to assign the language and/or auxiliary skills to agents who will provide this service. The higher the numeric value, the more skilled that user is.

Skills are assigned as percentage values (e.g., "100" or "50")

3. Click **Apply** to save your changes.

Step 4: Create the scenario for the service

1. Go to *Configuration* > *Scenarios* > *Chat* to create the voice scenario for this service.

2. Either select an existing voice scenario from the list, or click the**Add from template** button at the bottom of the screen to create a new chat scenario from the “Inbound Voice” template.

Select the "Inbound Voice" template

3. Creating a new scenario from a template will open the Scenario Builder application in a new browser tab or window. For the purpose of this simple setup, leave the scenario as-is and click **Save**. You can come back to Scenario Builder later to edit the scenario.

Name the scenario

4. Give the scenario a unique name (e.g., "Inbound Sales") and click **Save** again. Your new scenario will appear in the list of scenarios.

Step 5: Associate the scenario with a service

1. Go to *Scenario Entries* > *Dial-in*.

2. Select the dial-in scenario entry that has been preconfigured for your contact center (typically “Voicemail”).

3. In the **Service** property, select the inbound voice property that you created earlier in this procedure. This associates the scenario entry with the inbound voice service.

Dial-in scenario entry properties

4. Click **Apply** to save your changes.

Note: The remaining steps are optional and depend on your workflows and reporting requirements.

Step 6: Specify service level thresholds

1. Go back to *Services & Campaigns* and select the chat service you just created.

2. In the Service Level tab, set the percentage of chats associated with this service that are expected to be answered within a certain amount of time.

Set service level thresholds

Step 7: Specify dial-out information

1. Go to *Directory* > *Dial-out Entries* and select an entry from the list. A dial-out entry is an access number that has been assigned to your contact center by your service provider.

2. Update the entry properties, including phone number prefixes and caller ID, for outbound consultation calls.

Update dial-out entries properties

Step 8: Set up periodic call recording exports

1. Go to *Services & Campaigns* > *Results tab*.
2. Under **Periodic Recording Export Jobs**, click **add**.
3. Update all the properties, specifying which call recordings should be exported and where they should go.

Periodic Recording Export Jobs properties

Step 9: Configure caller ID

1. Go to *Services & Campaigns* and select your inbound voice service from the list of services.

2. Click on the Numbers tab and then on the **Caller ID** button to configure a caller ID for outbound SMS communications.

3. Click the **Add caller ID** (**+**) button.

4. Select your phone number from the list, and enter a state/province to be displayed.

5. Click **Apply** to save your changes.

= Step 10: Customize historical reports

Review the available service reports and, if necessary, customize them to your specific reporting needs.

Your inbound voice service configuration is now complete.

Service Configuration Quickstarts

Be sure to read Bright Pattern's other service configuration quickstarts, which will help you to set up bot-assisted chat services, campaigns, and email services for your contact center:

- Chat Service Configuration
- Outbound Campaign Service Configuration
- Email Service Configuration

Overview

The purpose of an outbound messaging campaign is to automatically send a pre-configured SMS/MMS message to destinations specified in a calling list. You can use this type of campaign for a variety of tasks including appointment reminders, payment notifications, sales notices, case status updates, delivery information, and so forth.

This tutorial describes the steps involved with an end-to-end outbound messaging campaign:

- Prerequisites
- Create a List
- Create a Personalized Message
- Prep Ahead for Replies
- Calculate Campaign Duration
- Upload the List
- Configure the Outbound Messaging Campaign
- Run the Campaign
- Download the Campaign Results