5.8 Contact Center Administrator Introduction

Bright Pattern Documentation

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Purpose

The Bright Pattern Contact Center *Reporting Reference Guide* describes the reports available out of the box with the Bright Pattern Contact Center solution. These reports contain key performance indicators for the main contact center resources, such as agents, agent teams, services, and scenarios.

The guide also explains how to interpret campaign results, search for interaction records, and review associated call recordings and chat transcripts.

Contact Center Administrator User Interface

The following articles describe the user interface of the Contact Center Administrator application.

- User Interface Overview
- Login Procedure
- Application Settings

Contact Center Administrator user interface

Tutorials Overview

Bright Pattern Contact Center help documentation includes useful tutorials to help system administrators, some of which live in the *Tutorials for Admins* guide. For more information, see the following:

- About Tutorials for Admins

- Configuration Quickstart

An example of chat widget configuration

Concepts Overview

This section of the *Contact Center Administrator Guide* provides definitions and descriptions of key concepts related to your everyday contact center operations. The articles in this section are meant to increase your understanding of the areas in which you will be working on a daily basis in Bright Pattern Contact Center.

Section Articles

- Conversational IVR

Conversational IVR scenario example

Users & Teams Overview

All contact center personnel who may need access to any functionality of your Bright Pattern Contact Center solution must be registered as users in the solution configuration. Usually, such personnel includes all contact center agents and supervisors who need to have access to interaction handling and supervisor functions respectively, as well as all contact center managers and administrators who may need to use the Contact Center Administrator application for any type of administration tasks. Access to any Application of Bright Pattern Contact Center solution is protected by username and password.

For management and reporting purposes, users are assigned to teams. Note that in Bright Pattern Contact Center, a user cannot be a member of more than one team.

The exact set of functionality available to a particular user is defined by the role(s) assigned to this user in the solution configuration.

Sections

The following is a list of sections found in the Contact Center Administrator application, section Users & Teams.

- Users
- Forwarding and Voicemail Operation

- [Teams]
- [Agent Dashboard Metrics]
- [Roles]
- [Privileges]
- [Skill Levels]
- [Training Classes]
- [Help Screens]

Users & Teams overview

Directory Overview

In the Contact Center Administrator application, Directory is the section dedicated to telephony, including softphone, hardphone, and access numbers configuration. Additionally, you are able to create internal and external directories for your Agent Desktop users, which allow you to define what users have access to what contacts.

Sections

The following is a list of sections found in the Contact Center Administrator application, section Directory.

- [Softphones]
- [Hardphones]
- [Access Numbers]
- [Dial-out Entries]
- [Static Entries]

- Special Numbers

Directory overview

Scenario Entries Overview

The logic of automated interaction processing is defined in scenarios. Execution of a scenario with respect to a specific interaction is triggered by an interaction arrival at a specific *access point* (e.g., a phone number in the case of inbound calls, or a web page in the case of web chats). The logical entities that associate specific scenarios with access points are called *scenario entries*.

Sections

The following sections are found in the Contact Center Administrator application, section Scenario Entries.

- Dial-in
- Messaging/Chat
- Web Callback
- Email

Scenario Entries overview

Scenarios Overview

Scenarios define the logic of automated interaction processing in your contact center. Execution of a scenario with respect to a specific interaction is triggered by a particular event, such as the arrival of a call at a specific access number or the initiation of a chat session from a specific web page; these scenarios are executed by the Scenario Engine.

Scenarios can perform many different automated actions. For example, with respect to an inbound call, scenarios can collect additional information via Interactive Voice Response (IVR), identify the requested service, and distribute the call to one of the qualified and available contact center agents. Additionally, should a scenario failover occur (i.e., a Scenario Engine fails while processing a Voice scenario), the scenario will be transferred to a backup Scenario Engine; this will restart the scenario from the last executed block and prevent active, connected calls from being disconnected.

The list in the left pane of the scenario view displays the existing voice scenarios. If a scenario is being edited by someone else at the moment, the name of the editor will appear in the *Currently Edited By* column.

For further information, see Scenario Builder Overview in the *Scenario Builder Reference Guide*.

Sections

The following is a list of sections found in the Contact Center Administrator application, section Scenarios.

- Voice
- Chat

Scenarios

How to Create, Edit, and Delete Scenarios

To create a scenario:

1. First select the media type of the interactions that this scenario will process (voice or chat).
2. In the scenario list view, click the **Add scenario** button at the bottom of the list.

To edit a selected scenario:

1. Click the **Edit scenario** button at the bottom of the list.

Once the scenario is edited and saved all the changes will be applied and the next interaction will follow the latest saved scenario.

To delete a scenario:

1. Click the **Delete scenario** button at the bottom of the list.

Clicking either the **Add scenario** button or the **Edit scenario** button will open the Scenario Builder application in a new browser window or tab. The Scenario Builder application includes all the control elements that may be used in automated interaction processing.

How to Use Scenario Templates

Bright Pattern Contact Center provides a number of scenario templates for some standard functions, such as virtual queue and compliant telemarketing calls. Depending on the type of scenario your are working on, it may be easier to select a corresponding template and customize it to the requirements of your contact center, as opposed to creating a scenario from scratch.

To create a scenario using a template:

1. Click the **Add from template** button, which will open the *Select template* window.

The *Select template* window will offer a drop-down menu with the following templates from which to choose:

- Auto-Attendant
- Campaign Return Calls
- External Agent Dial-in
- IVR Campaign
- Inbound Service
- Predictive Telemarketing Campaign
- Right Party Connect Campaign
- Salesforce Integration Example
- Virtual Queue (Callback)
- Voice Prompt Recording
- Voice Signature

These templates are described in section Voice of this guide.

Select the desired template, modify the content as needed, and save it as your new scenario.

Select a scenario template from the list given

How to Export and Import Scenarios

To export a scenario:

1. First, select the media type of the scenario you will export (i.e., voice or chat).
2. In the scenario list view, select/highlight the name of the scenario you wish to export.
3. After selecting the desired scenario, click the **Export scenario** button. Note that the file will download as soon as you select this button.
4. The exported file will be in .ZIP format.

An exported scenario file

To import a scenario:

1. Before importing a scenario, note that the file should be in .ZIP format (i.e., the same format as an exported scenario).
2. Select the media type of the scenario you will import (i.e., voice or chat).
3. In the scenario list view, click the **Import scenario** button, which will open the *Import Scenario* window.
4. In the *Scenario name* field, enter the name you would like to give the imported scenario.
5. In the *Import from* field, click the **Browse** button to find and select the file you would like to import.
6. After naming and selecting the file, click the **Import scenario** button.

Import scenario window

Workflows

After all interactions are finished, call dispositions and other such actions can start a scenario that automates what happens next. For example, setting a particular disposition for an interaction could trigger the following series of events to happen:

- Send a survey to the customer
- Wait a specified amount of time (e.g., 30 minutes, 1 day, 1 week, etc.)
- Send a follow-up email to the customer.

This series of events is called a *workflow*, and workflows are launched automatically based on the disposition that triggered it.

Workflows are created in the Contact Center Administrator application and are edited in the Workflow Builder application. Workflows will handle any necessary follow-ups, depending on the interaction's disposition type. Such follow-up actions include setting context variables, sending an email, sending a text message, scheduling an event, clearing a scheduled event, and making an external request (or internal API call). Workflows reduce the workload of agents while following up with customers and gathering data in a consistent way.

For more information, see the *Workflow Builder Reference Guide*. Note that variables may be used when configuring both scenarios and workflows. For more information, see the appendix Variables.

Workflows

Workflow Entries Screen Properties

Workflows are added to services as workflow entries. To add a workflow, navigate to *Configuration* > *Workflows* and select the + button.

Name

Every workflow entry needs a *name*. This field is mandatory.

Type

Type of workflow. Currently only post-processing workflows are supported. The email pre-processing workflow type is reserved for future use.

Service

Service is the name of the service with which the workflow entry should be associated.

Triggers

Triggers are the events that cause a configured workflow to be launched. To add triggers, click **add**, select the available triggers and their properties, and select the green check mark to apply your changes.

Trigger types include the following:

- Interaction ends with disposition
- Non-final case disposition
- Average sentiment

Interaction ends with disposition

If this trigger is selected, you must select a specific disposition from the drop-down list.

Interaction Ends with Disposition trigger

Non-final case disposition

If this trigger is selected, you must select a specific non-final case disposition from the drop-down list.

Non-Final Case Disposition trigger

Average sentiment

If this trigger is selected, you must show the percentage of the average sentiment. This is done by selecting< or > and moving the percentage slider to the complete the following type of example statement: *A workflow is triggered if the average sentiment is greater than 0.51.*

Average sentiment

Services & Campaigns Overview

A service is a logical concept that reflects a specific reason for customers to contact your business, or, in case of outbound campaigns, a specific reason for your business to contact customers. Services play the key role in design of interaction processing logic, evaluation of contact center efficiency, and workforce management.

Note that when you define a new service, a default skill representing this service is created automatically by the system. When you associate the service with an agent team, this default skill can be automatically assigned to all current and future members of the team.

To set up services or campaigns, select the **Services & Campaigns** option from the root menu.

Tabs

The following is a list of all tabs found in the Contact Center Administrator application, section Services & Campaigns. Note that some tabs are service-specific.

- Properties Tab
- Assignments Tab
- Lists Tab
- Dispositions Tab
- Activity Tab
- Numbers Tab
- Service Level Tab
- Outbound Tab
- Results Tab
- Archive Tab
- Canned Tab
- Email Tab
- Pre-defined Dispositions
- Outbound - General
- Outbound - Calling Hours

- Outbound - Dial Rules
- Outbound - DNC
- Outbound - Diagnostics

Services & Campaigns

Types of Services

To create a service, click the **Add service** button. The following is a list of the service options and brief descriptions of what they do.

Inbound Voice

Inbound Voice services are used for inbound voice services.

Outbound Voice

Outbound Voice services are used for pure outbound campaigns.

Blended Voice

Blended Voice is for when you expect to receive inbound calls that are logically part of your outbound campaign (i.e., when customers who missed your campaign call attempts call back using one of the campaign Caller IDs) and want those inbound calls to be handled by the same agents and in the same way.

Chat

Chat is for chat services.

Marketing

Marketing services utilize email and voice campaigns for managing and gaining business leads.

Email

Email is for email services.

Outbound Messaging

Outbound Messaging is for pure outbound SMS/MMS campaigns.

Select the type of service you would like to create

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 sectionImporting 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 apredictive, 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, in both cases list update procedure can be performed on-a-fly during actively running campaign.

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

Do Not Call Lists

Do Not Call (DNC) lists contain data about destinations that may not be called during outbound calling campaigns. At the configuration stage, one or more DNC lists may be associated with a campaign. When the campaign is started, records from the campaign's calling lists are checked against the DNC data, and if a match is found, the number or the entire record is skipped.

For more information about associating DNC lists with campaigns, see the description of theDNC screen of the outbound campaign settings.

To view and edit DNC lists, select the *Do Not Call Lists* option from the root menu.

Do Not Call Lists

When you click the button with the "+" sign to configure a new DNC list, you will be first prompted to select the list type. The set of properties that you will have to configure will depend in part on the DNC list type.

Note that you can import your existing data for DNC lists of all types except*Geographic (State/Province)*. To import list data, click the import button and select a file to upload.

Settings

The *Do Not Call Lists* screen properties are organized into several tabs: Properties, Contents, and Log. The screen properties are described as follows.

Properties tab

Name

Name is the name of the DNC list. A mandatory field, the name must be unique within the contact center.

Type

Type is the type of this DNC list. It is mandatory, and once specified, it cannot be changed.

The following types of DNC lists are supported:

- **Internal**: A list of phone numbers created and maintained within your contact center; numbers are added to this list when agents participating in an outbound or blended service finish call processing with disposition *Add to DNC*; numbers in the calling records that match numbers in DNC lists of this type will not be dialed (but the record itself may continue to be used if it has other numbers in it)
- **Geographic (Postal)**: A list of postal codes; if a postal code of a calling record matches a postal code in this type of DNC list, processing of this calling record within the given campaign will stop. Please note that for this type of DNC you need to have the proper country selected, and the phone numbers of calling lists used in the associated campaigns must start with a country code.
- **Geographic (State/Province)**: A list of states/provinces; if the state/province info of a calling record matches a state/province in this type of DNC list, processing of this calling record within the given campaign will stop. Please note that for this type of DNC you need to have the proper country selected, and the phone numbers of calling lists used in the associated campaigns must start with a country code.
- **Area codes**: A list of area codes; if the area code of a phone number in a calling record matches an area code in this type of DNC list, this number will not be dialed (but the record itself may continue to be used if it has other numbers in it).
- **Record Exclusion**: A list of identifiers of customer records in calling lists (e.g., customers' account numbers); if a match is found, processing of this calling record within the given campaign will stop; note that DNC lists of this type can be updated periodically via FTP (see property *Periodic Import* below); the results of such periodic updates are displayed in the *Log* tab

List field to match

Select the calling list field that will be used as identifier of customer records that must not be dialed. This property is displayed only for DNC lists of the *Record Exclusion* type and contains list fields from all available calling list formats.

Country

Country is the country whose postal codes or state/provinces that this DNC list shall contain. This property is displayed for DNCs of types *Geographic (Postal)*, *Geographic (State/Province)*, and *Area Codes*. Note that default country options include the United States and Japan.

Campaigns

These are the *campaigns* associated with this DNC list. Such association is typically established as part of campaign configuration. However, if you need to associate a new DNC list with an existing campaign, it may be more convenient to do it directly from this screen.

How to create a new DNC list with an existing campaign:

- Click **add**
- Select the desired **Campaign** from the drop-down menu
- Specify the **Disposition** that will be attached to the call attempts (in case of number match) or to completed records (in case of record match)

If the campaign is part of a campaign link group, the selected DNC list can be automatically applied to all other campaigns in the link group. To indicate that the list shall apply to all campaigns in the link group, select the **add all linked campaigns** checkbox.

When associating an internal DNC list, note that by default it will be possible to add new numbers to this list during the given campaign (e.g., upon request of the called party). If you wish to block this capability, deselect the **append OK** checkbox.

To associate a DNC list with all campaigns, click **add all** and select the desired disposition. To remove all previously established associations, click **remove all**.

Note that numbers are added to internal DNC lists in the context of active campaigns that the corresponding calls are associated with. Therefore:

- If you use multiple internal DNC lists associated with different campaigns, a number will be added only to the list(s) associated with the campaign within which the corresponding call was handled.
- If you use a blended service, you should keep the outbound portion of this service enabled at all times in order to correctly process the possible do-not-call requests of the customers who call back your campaign. If the outbound portion of your blended service is disabled, numbers will not be added in such situations.

States/Provinces

These are the *states/provinces* whose phone records must be excluded from outbound campaigns associated with this DNC. This property is displayed for DNCs of type *Geographic (State/Province)* only. To add a state/province to this list, click **add**.

Periodic Import

Parameters are specified for the periodic list import. These parameters apply to DNC lists of type *Record Exclusion* only.

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

In the dialog that appears:

- Specify the protocol (**FTP** or **SFTP**), **URL with file name**, **FTP Username**, and **FTP Password**.
- Select the **Start date and time** of the first update and specify the desired **Import interval**.
- Select the desired **Update Policy** (see the description of the List Update Wizard properties for more

information about the update policies).
- Click **OK**.

Once the above parameters are defined, select the **Enabled** checkbox to activate periodic import.

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

Periodic Reset

Parameters for daily list data reset. These parameters apply to DNC lists of type *Record Exclusion* only.

To enable periodic reset, select the **Reset list data daily** checkbox, and specify the desired **Reset time**.

Contents tab

List view

List view shows the entire content of the DNC list. It is read-only. Note that the view will be different depending on the DNC list type.

- An *Internal* list displays the numbers, identifiers of the agents who added them, time and date when they were added, and campaigns during which they were added.
- A *Geographical (Postal)* list displays postal codes and possible free-text notes. To add a postal code to this list, click the "**+**" button at the bottom of tab view, specify the desired code in the **Postal Code** field, enter any additional information in the **Notes** field, and click **Apply**.
- An *Area Codes* list displays area codes and possible free-text notes. To add an area code to this list, click the "**+**" button at the bottom of tab view, specify the desired code in the **Area Code** field, enter any additional information in the **Notes** field, and click **Apply**.
- A *Record Exclusion* list displays values of the selected field that should lead to record exclusion when matched.

Log tab

The Log tab is for DNC lists of type *Record Exclusion* only.

Timestamp

This is the time stamp of the operation.

File

File is the name of the imported/reset file.

Operation

The type of the operation is specified here.

Number of records

Number of records is the total number of successfully imported/reset records during this operation.

Operator

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

Notes

The *Notes* field gives the operation result.

DNC list data is deleted from the calling list database automatically when the corresponding DNC list object is deleted from configuration. Current data of the DNC lists of type *Record Exclusion* is also deleted when the list is reset or updated with new content via periodic import (where applicable) with the update policy set to *replace list data*.

Tasks Overview

The Tasks section allows you to see all automated contact center tasks that may have been scheduled for periodic execution; these include periodic report generation or automatic start and stop of outbound campaigns. The tasks whose execution has ended appear in the task log.

Sections

- Scheduled and In-Progress Tasks
- Task Log

Case & Contact Management Overview

Section Case & Contact Management is where you may configure settings related to cases and contacts, such as custom case categories, custom case pending reasons, and bulk contact import and export. Additionally, forms are defined in this section. For more information about forms, see the *Form Builder Reference Guide*.

Sections

The following is a list of sections in the Contact Center Administrator application, section Case & Contact Management.

- General Settings
- Client Partitions
- Case Categories
- Case Pending Reasons
- Custom Fields
- Forms
- Contact Import & Export

Case & Contact Management

Call Center Configuration Overview

Section Call Center Configuration is where global (i.e., contact-center wide) system settings are defined. These include hours of operation and calendars, user language and auxiliary skills, omni-channel routing, integration accounts, and so forth. When you first being configuring your contact center, this is one of the most important sections to spend time on; the settings here affect other areas of configuration including the rate at which your agents receive interactions, when customers can contact your center, how scenarios are defined, and much more.

Sections

The following is a list of sections in the Contact Center Administrator application, section Call Center Configuration.

- General Settings
- Integration Accounts
- Identification
- Knowledge Base
- Calendars
- Hours of Operation
- State Calling Hours
- Auxiliary Skills
- Language Skills
- Audio Treatments
- Shared Voice Segments
- Voicemail

- Phone Devices
- Omni-Channel Routing
- Chat Settings
- Email Settings

Call Center Configuration

Quality Management Overview

Section Quality Management is where you define system-wide settings related to managing the quality of the interactions between agents and customers; call and screen recording settings are configured here.

Sections

The following is a list of sections in the Contact Center Administrator application, section Quality Management.

- General Settings
- Evaluation Forms
- Survey Forms
- Grading Categories
- Call Recording and Monitoring
- Screen Recording

Quality Management

Reporting Overview

Section Reporting is where the reports in section Reports are defined, uploaded, and managed. Note that the settings configurable in these sections affect the reports in section Reports. For more information, see the *Reporting Reference Guide*.

Sections

The following is a list of sections in the Contact Center Administrator application, section Reporting.

- Report Templates
- Reporting Settings
- WFM Reports
- Teleopti WFM Reports

Reporting

Custom Overview

Section Custom is where custom reporting field and custom survey fields are defined. These fields may be used in email surveys, in forms, in scenarios, and so forth.

Sections

The following is a list of sections found in the Contact Center Administrator application, section Custom.

- Custom Reporting Fields
- Custom Survey Fields

Custom

Security Overview

Section Security is where global (i.e., contact-center wide) security settings are defined, including account lockout settings, text masking, system access restrictions, the audit log, and so forth.

Sections

The following is a list of sections found in the Contact Center Administrator application, section Security.

- Security Policy
- System Access Restrictions
- Text Masking
- Encryption Settings
- Encryption Key Management
- Audit Log

Security

Application Notes

Application notes are supplementary materials that provide further instructions and procedures for various subjects related to the configuration of or integration with Bright Pattern Contact Center software.

The following application notes are available for use with Contact Center Administrator:

Agent Desktop

- Agent Desktop Helper Application Audio-Handling Options
- WebRTC Browser Audio Limitations

IBM Cloud

- Updating IBM Cloud URL Endpoints

Microsoft Teams

- Microsoft Teams Integration Configuration Overview
- Microsoft Teams Integration Configuration Quick Start
- Configuring the Microsoft Graph API as an Authentication Mechanism for Secure Microsoft Teams Content
- Configuration for Microsoft Teams Direct Routing

- How to Add a Microsoft Teams Integration Account

Phones

- Bria Mobile Softphone Configuration
- Cisco SPA Hardphone Configuration
- Polycom Hardphone Configuration
- Softphone Solo Configuration

Storage

- Setting Up Private S3 Storage

All Appendices

The following appendices comprise reference material useful for configuring your contact center.

- Agent Desktop Helper Application
- Countries, Calling Codes, and Time Zones
- Glossary
- Interaction Recording and Transcript Storage and Erasure
- System Requirements
- Variables