5.8 Services

Bright Pattern Documentation

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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

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.

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.

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.

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.

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.

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

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

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

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.

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

Outbound Messaging Campaign 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

Creating an Outbound Preview Campaign

The following tutorial describes how to create an outbound campaign container. Creating this campaign will later allow you to distribute the records from the list to your agents via the Agent Desktop.

Procedure

1. Login to Bright Pattern’s Contact Center Administrator.

2. Click *Services & Campaigns* from the left menu.
3. Choose the *Properties* tab.
4. Click the " + " button on the bottom to add a new campaign.
    a. A *Create Service* window will open.
    b. There are seven radio buttons to choose from: *Inbound Voice, Outbound Voice, Blended Voice, Chat, Marketing, Email,* and *Outbound Messaging.*
        i. Choose "Outbound Voice." You could theoretically choose any of the options, but *Outbound Voice* allows your agents to contact your potential customers from the website form via calling out.
        ii. Click "OK."
5. In the right pane, make sure you are still on the *Properties* tab.
    a. Name the campaign.
    b. For this example, we have named our campaign "WebformPreview."
    c. Under the *Type* dropdown, choose "Outbound Voice."
    d. Scroll down to the "Require dispositions" checkbox and check it.
    e. Click "Apply."

Note that this is where you specify that dispositions are required for your campaign. Alt: Screenshot of Bright Pattern Contact Center Administration's Services and Campaigns Preview Properties pane with specific areas highlighted

6. Move one tab to the right to the *Assignments* tab.

    a. There are four groups to add to: *Teams, Administrators, Operators,* and *Reviewers.*

        i. Choose “add” to add the appropriate teams to each group.

        ii. This brings you to a blank team choice dropdown.

            1. In our example, we have chosen to add *Customer Service* to the *Teams* group.

            2. Click the green check mark to save.

Screenshot of an Add function dropdown box

        iii. Go down the list, adding whichever teams you deem appropriate to each group.

        iv. Next, select the desired Administrators for the campaign.

    b. When you are finished, click “Apply.”

7. Move one tab to the right to the *List* tab.

    a. Note: Pull up the bottom pane from the right side if you can’t see it initially.

Make sure to check the *Enabled* checkbox in the lower pane before clicking *Apply*. Alt:Screenshot of the Bright Pattern Services Campaign List setup form with important areas highlighted

8. To add a new list to the *Lists* tab, click the bottom right “ + “ sign.
    a. This will open the *Add Calling List* window with a blank field and a drop down.
        i. Click the drop-down menu and choose from the available lists.
            1. In our example, we are choosing *WebsiteFormLeadsCSV*.
        ii. Click “OK.”
    b. In the *Lists* tab, on the bottom pane, make sure the *Enabled* checkbox is checked.
        i. Click “Apply.”
9. Move one tab to the right to the *Dispositions* tab.
    a. There are two groups: *Outbound* and *Preview Record.*
        i. Clicking either shows you the list of available disposition reasons.
            1. These can be added to or edited at your discretion to fully adapt to your call center’s disposition needs.
        ii. For the time being, choose *Outbound*.
    b. Click “Apply.”

10. Move one tab to the right to the *Activity* tab.
    a. There is a checkbox labeled "Enable screenpop activity form" with a drop-down menu.

    b. Click the drop-down menu.
        i. Choose from the list of available forms.
            1. For our example, we have chosen *Info Form* from the *Creating an Activity Form* tutorial above.

        ii. Click "Apply."

11. Move one tab to the right to the *Numbers* tab.
    a. This is another two-pane tab.
        i. If necessary, drag the bottom pane on the right side upward.

    b. Click the " + " button on the bottom right to add a default Caller ID number to the available list and to specify which state/province the dialer is dialing from.
        i. This will open an *Add Caller ID* window.
            1. There are two fields: *Caller ID* and *State/Province*.
                a. Click the Caller ID drop-down menu to choose which number to dial from.

                b. Type into the empty text field which state or province in which this phone number is located.

                c. Click "OK."

    c. On the top pane, there are two choices: *Scenarios* and *Caller ID*.
        i. As we have not created any scenarios for this campaign, choose *Caller ID*.
            1. There are two drop down fields:
                a. Selection Method: This drop-down list selects how you wish the user to see the *Caller ID* number.
                    i. For this example, we have chosen "Default."

                b. Default: This gives the option to specify the default service/campaign caller ID number.

                c. Choose from the list of available numbers.

        ii. Click "Apply."

When choosing a phone number to be the default Caller ID, make sure that the number is in good working order. Alt: Screenshot of the Bright Pattern Service's Campaign Caller ID numbers setup pane

12. Move one tab to the right to the *Outbound* tab.
    a. There are five sub-tabs: *General, Calling Hours, Dial Rules, DNC,* and *Diagnostics.*

Alt:Screenshot of the Service and Campaign's Outbound tab sub-tabs

    b. Click on *General*.
        i. The first section has three fields: a *Type* drop-down menu, an *Enabled* checkbox, and *Status* buttons (Start and Stop)
            1. Type: Click the *Type* drop down and choose *Preview*.
                a. This is an outbound campaign that receives its information from a customer-initiated webform. It does not use *Predictive* or *Progressive* algorithms and *Automatic* doesn't apply in this situation.
            2. Check the *Enabled* checkbox so that the campaign is enabled and will be ready to use later.
            3. For the time being, leave the *Status* button on "Stop."
                a. Later, when you are ready to run the campaign, you will click the "Start" button and then "Apply."

Remember to enable the campaign here with the *Enabled* checkbox. Alt:Screenshot of Bright Pattern's Services and Campaigns Outbound General tab

ii. The second section - Start/Stop Automation - does not need to be interacted with for this tutorial. Leave it alone.

iii. The third section, *Preview Options*, has five fields.

iv. For this tutorial, you only need the first three: the *Screenpop URL* field, the “Start dialing first number automatically” checkbox, and the “Start dialing after:” field.

   1. You pass in a website address into the *Screenpop URL* field if you wish the agent to see a specific website posted on their Agent Desktop form when interacting with this client.

   2. Click the “Start dialing first number automatically” checkbox if you wish your agent to have the phone number field fed to their dialer automatically.

   3. Enter a number of seconds into the “Start dialing after:” field to determine the wait time between the agent receiving the form information from the list.

v. Click “Apply.”

c. Click on *Calling Hours*.

   i. There are four sections in the *Calling Hours* tab: *Hours*, a “Phones to call, by preference” drop down, the “Use safe calling hours” checkbox, and “Comply with state calling hours” checkbox.

      1. The *Hours* section is where you can add and specify the hours of your calling center, as well as the hours that you will allow agents to call from this list for this campaign.

      2. The “Phones to call, by preference” dropdown is where you pass the phone number variable from the webpage form.

         a. In this example, it is “PhoneNumber”.

         b. Click on the drop down and choose the phone variable.

         c. Click on the green checkmark to save.

Make certain to provide the variable from the form field beneath "Phones to call, by preference." Alt: Screenshot of Bright Pattern's Services and Campaigns Outbound Calling Hours section with the variable to pass in highlighted

3. Check the "Use safe calling hours" only if you have collected zip code and address information from your website form. The system will check the provided zip code information against the time of day where the call is originating from to verify if it is an appropriate time to call the customer back.

4. Check the "Comply with state calling hours" box if it is necessary that your call center requires this option.
    a. Example: A 24/7 call return form for plumbing emergencies would not need to comply with state calling time guidelines.

    b. Click "Apply."

d. Click on *Dial Rules*.
    i. Note: This section has an upper and lower pane. If you cannot see the lower pane, drag the gray bar up from the bottom to reveal the *Disposition Retry* pane.

    ii. The top pane of *Dial Rules* includes three fields: a "Maximum attempts per record" field, a "Maximum attempts per number" field, and an "Attempt all numbers in record first" checkbox.
        1. For the time being, leave the two "Maximum attempts" boxes as default. You can return later to adjust these sections to your desired specifications.

        2. Only check the "Attempt all numbers in record first" checkbox if you wish to cycle through all of the records in the website form list first before beginning the list again.
            a. If the list is particularly long, consider leaving this unchecked.

        3. The bottom pane is the *Disposition Retry* panel. It includes: *Disposition*, *Retries*, *Retry Interval*, and *Action*.
            a. By choosing each individual disposition and clicking the pencil icon on the bottom right, you can specify and streamline a time frame before your outbound agents can call the client back.

            b. For this tutorial, we will be leaving these as default.

iii. Click “Apply.”

This is the section where you can streamline how often to call or recall during your campaign. Alt: Screenshot of Bright Pattern's Services and Campaign's Outbound Dial rules with several areas emphasized

e. Click on Do Not Call (*DNC*).
    i. This section allows you to append a Do Not Call list (*DNC*) to your campaign by clicking the “add” link and choosing a DNC list from the available drop down menu.

    ii. In this tutorial, you will not be adding a DNC list.

    iii. Click “Apply.”

f. Click on *Diagnostics*.
    i. The *Diagnostics* page has one primary purpose: *Configuration Checks*.
        1. If the page is blank that means that your set up is sufficient so far.
            a. Click “Apply.”

        2. If the page is not blank, there will be a list of potential issues to be addressed beneath *Configuration Checks*.
            a. Example: You see the error: “Inconsistent assignment of teams to enabled campaigns”

with an “edit” link to the right. This means that you have assigned too many campaigns to one specific team.

b. Click on the “edit” link and it will take you to the issue in question, where you can fix it if you so wish.

3. When the *Diagnostics* error list is fixed to your satisfaction, click “Apply.”

If the indicated area in *Configuration checks* is blank, you do not have any issues to clarify." Alt: Screenshot of Bright Pattern's Services and Campaign's Outbound Diagnostic's page

g. The remaining three tabs (*Results, Archive,* and *Canned*) will not be needed for the rest of this tutorial.

h. Click “Apply.”

i. The basic Outbound Campaign is now set up.