5.8 Configuration

Bright Pattern Documentation

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Configuration Overview

Section *Configuration* presents tutorials about configuration steps you should follow in order to accomplish specific tasks within your contact center, for example, configuring hours of operation. Configuration articles may require knowledge about and access to various Bright Pattern Contact Center applications, such as Contact Center Administrator, Scenario Builder, Form Builder, Agent Desktop, and so forth.

Tutorials

- Hours of Operation
- Configuring Exceptions to Standard Office Hours
- Regional Routing for Remote Agents
- Warm Transfer to Third Party Caller ID
- Automatically Identifying Activity History and Creating Contacts
- Assign a Supervisor to a Team
- How to Create a Team
- How to Create an Agent Role and Agent User
- How to Create Personal Assignments for Preview and Progressive Campaigns

Understanding Hours of Operation (HOP)

Setting up *hours of operation* (HOP) is one of the most basic and important things to consider when configuring your contact center. For example, your center may have agents in different timezones and regions of the world, and your customers should know when they can and can't reach you.

In the Contact Center Administrator application, you configure hours of operation *globally* (i.e., for your entire contact center), then can refine them per service, and further can refine them per scenario. Noting this, the most important thing to remember when configuring HOP is there is a hierarchy. That is, HOP are read by the system in a particular order, and every added HOP condition will supersede the previous one.

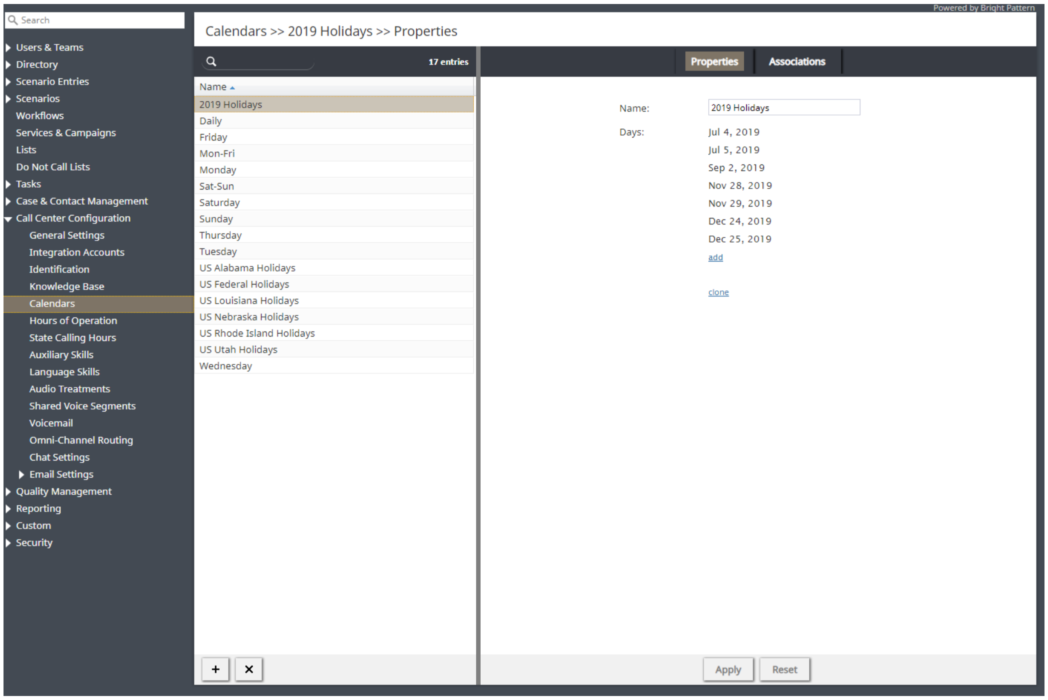
In this article, we will explain how the HOP hierarchy works in Bright Pattern Contact Center software by examining some HOP configuration examples.

Finally, as a general reminder, don't make things any more complicated than they need to be! Keeping track of multiple HOP conditions can be difficult, so, if a basic global configuration meets your center's needs, stick with this.

1. Call Center Configuration > Calendars

Before configuring your HOP, you should define your days of operation, known as *calendars*. Beginning in section Call Center Configuration, go to section Calendars. Here, you will see a number of predefined calendars available for use. If you need to create a new calendar or edit a pre-existing one, it should be done first. The reason for this is that when you define your global HOP entries, they are created based on days of operation.

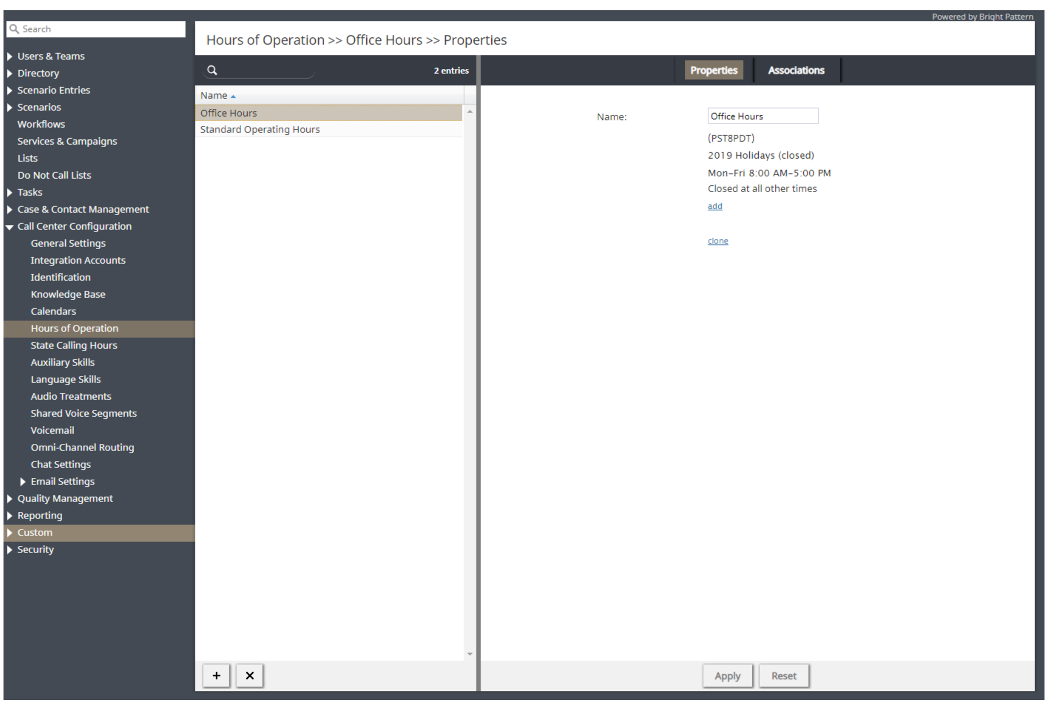
Note: Your contact center's holidays should be defined here first; once defined, they may be added to a global HOP entry.



Days of operation should be defined before hours of operation

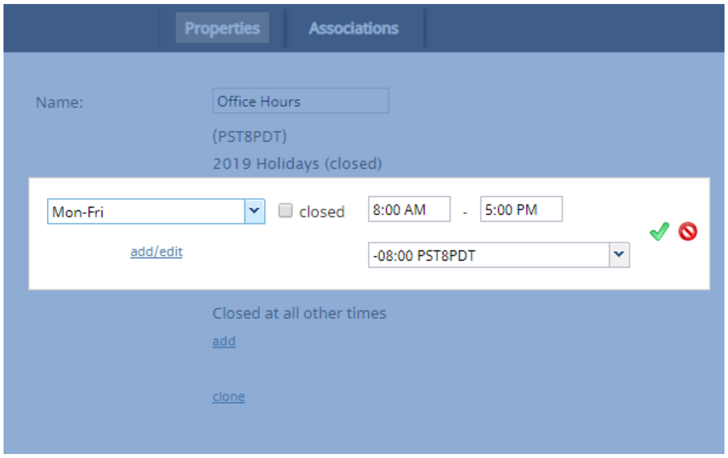
2. Call Center Configuration > Hours of Operation

Continuing in section Call Center Configuration, go to section [Hours of Operation](). This is where you configure your contact center's global HOP entries. You can configure as many different HOP entries as you need (e.g., weekday, weekend, holiday, etc.). Note that from the [Associations]() tab, you can see what services use a specific HOP entry.



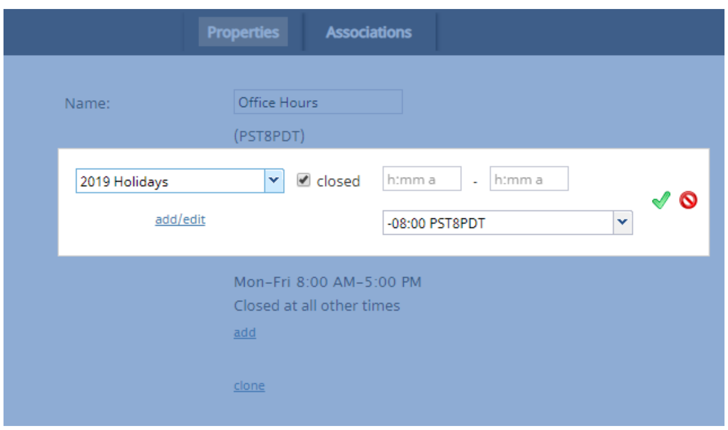
Global hours of operation

When creating an HOP entry, you will select a global Calendar first, then define the hours, and finally, select the timezone. Note that you may add as many conditions as you need to a global HOP entry.



Defining hours of operation

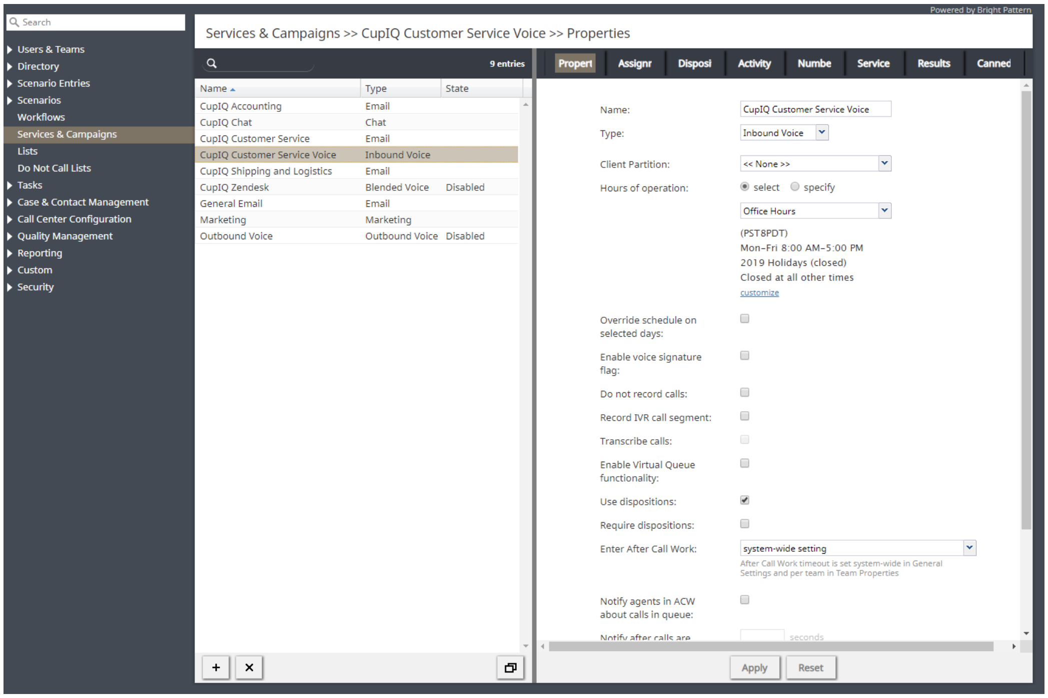
As a reminder, holiday calendars may be added as a condition to an HOP entry; however, instead of defining hours of operation, you will select the **closed** option.



Pulling in a holiday calendar allows you to set holiday hours globally

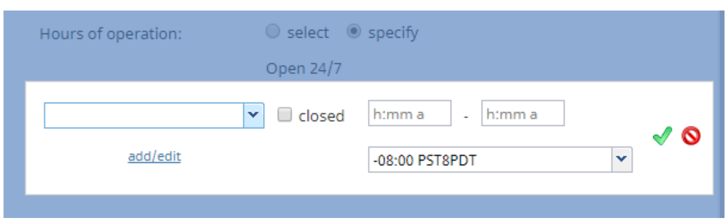
3. Services & Campaigns

After defining a global HOP entry, you will need to assign it to a service or campaign. To do this, go to section [Services & Campaigns > Properties tab](). For each service or campaign, you can set unique hours of operation; this includes email services.



Set hours of operation to a service or campaign

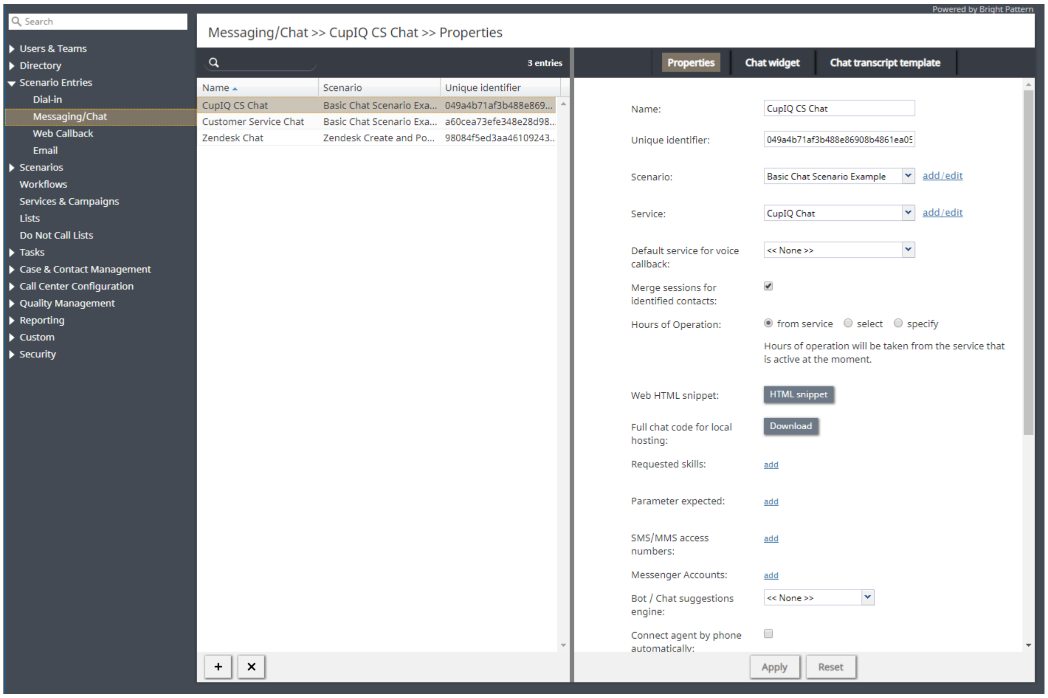
When configuring HOP for a specific service, you have two options: *select* and *specify*. Option *select* lets you select from your globally configured HOP. Should you desire, you have the ability to customize a selected global HOP entry; note that customized HOP override your global HOP. Option *specify* lets you create HOP from scratch, specifically for this service. To do this, click **add**, then configure the days and times you would like. Note that when *specify* is selected, the default option is *Open 24/7*.



Configure HOP specific to just one service

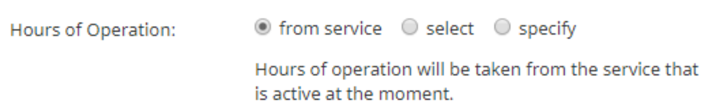
4. Scenario Entries

If you would like, you can continue to set further HOP conditions per scenario entry. To do this, go to section [Scenario Entries](). HOP conditions may be applied to all scenario entry types except email. Note that any unique HOP defined here override previous ones associated with service or global HOP.



HOP may be configured for all scenario entries except email

When configuring HOP for scenario entries, like in section Services & Campaigns, you have the option to *select* a new global set of hours or *specify* ones unique to this specific scenario entry. Additionally, there is the option *from service*, which takes the hours of operation from the services that are active at the moment. If you do not need any additional HOP conditions added to your scenario the *from service* option should be selected.

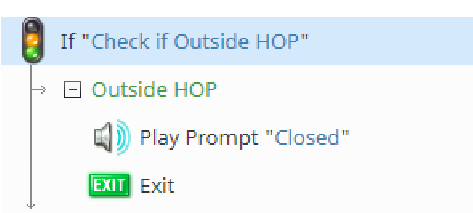


Scenario entries may pull HOP from service or be configured per entry

5. Scenarios

Section Scenarios is the final place where you may define HOP conditions; they are set using the If block in the Scenario Builder application. Note that when defined in a scenario, HOP conditions override all previous ones.

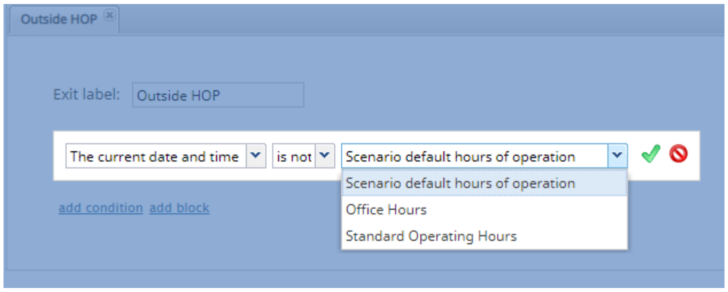
The most common use for invoking an HOP condition in an If block is to determine what happens to customers trying to reach your contact center outside your hours of operation, or an HOP check.



HOP check

To configure an HOP check, add an If block to the top of your scenario and create a branch. On this branch, add a condition that uses the The current date and time option. From here, you may select a global HOP entry, and the "is not" option, the result being the scenario checks to see if the interaction is happening outside of the selected HOP entry. When configured correctly, your condition will look like this:

- The current date and time
- is not
- Selected HOP



Create a condition that invokes HOP

Once the condition is configured, you then decide what to do with the interaction, such as sending a call to voicemail, a particularly skilled agent, routing the call to a third-party service, and so forth.

Configuring Exceptions to Standard Office Hours

If you read section Understanding Hours of Operation (HOP), you will have knowledge of how the HOP hierarchy works in Bright Pattern Contact Center software. By this point, you have configured your contact center’s standard hours of operation. But what do you do about holiday hours or other exceptions?

As a reminder, most exceptions and holidays can be managed by configuring calendars and assigning them to services in your contact center; however, other options may be used (e.g., the Scenario Builder application).

This tutorial will show you how to configure office hours for the following types of exceptions:

- Recurring exceptions
- Fixed holidays
- Moving holidays
- One-time or short-notice closures

Prerequisites

- You must be a system administrator in order to configure exceptions and holiday office hours.

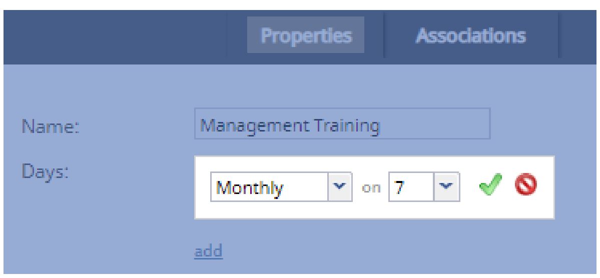
- You must have a previously configured service. For more information, see *Administration Tutorials*, section Services.
- You must have familiarity with the Scenario Builder application.
- It is recommended to read section Understanding Hours of Operation (HOP) before starting this tutorial.

Recurring Exceptions

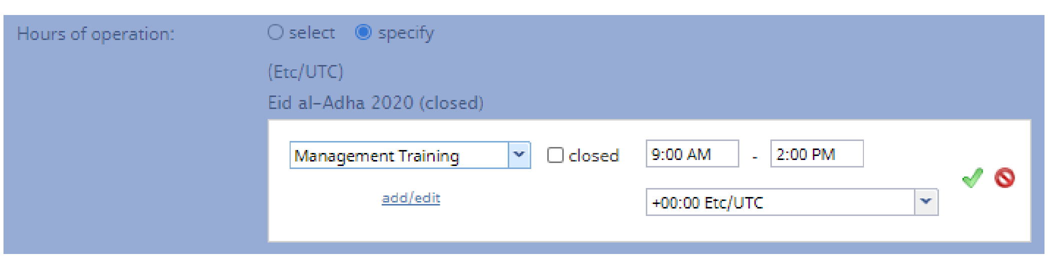
Recurring exceptions are days that you know ahead of time will be affected by a regularly occurring event. Examples of recurring exceptions include monthly employee training sessions, scheduled maintenance days, and so forth.

Procedure

1. Create a Calendar
    - In the Contact Center Administrator application, section Call Center Configuration > Calendars, click **Add calendar** to create a new calendar.
    - Give your calendar an appropriate name (e.g., Management Training). For the selection of days, click '*add* to add days. Here, you will have several options to specify frequency:
        - Weekly
        - Monthly
        - Yearly
        - One time
        - Nth day of week of month
    - For recurring exceptions, you may choose the *Weekly* option or the *Monthly* option.
    - When you are finished, click the **green check mark**, and then click **Apply**.



2. Assign the calendar to a service's hours of operation
    - In section Services & Campaigns > Properties tab, select a previously configured campaign.
    - For the Hours of operations setting, click **add**. From here, you will be able to select any of the calendars you created.
    - After selecting the desired calendar, you can either specify hours of operation or that the service will be closed.
    - When you are finished defining the hours of operation, click the**green check mark**, and then click **Apply**.

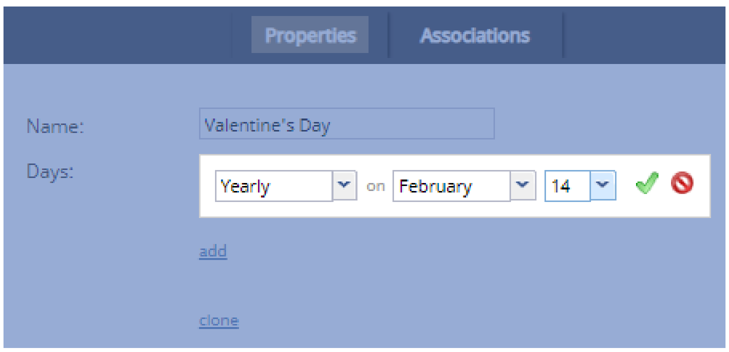


Fixed Holidays

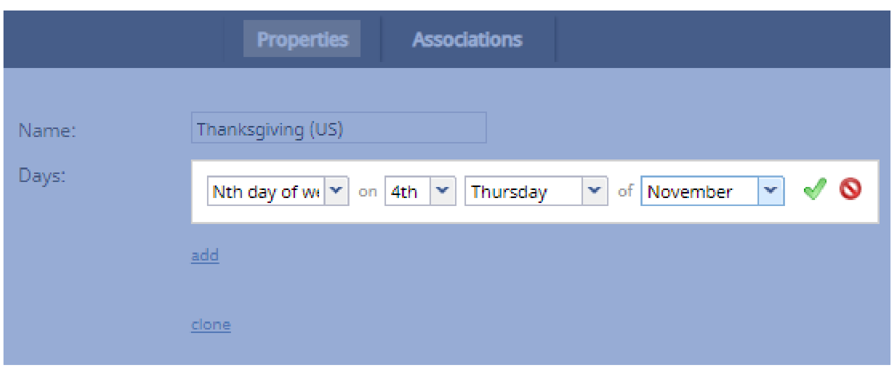
Fixed holidays are exceptions that happen on specific calendar days; the holidays can occur on a set date (e.g., Valentine's Day always occurs on Feb. 14) or at an otherwise specified time (e.g., Thanksgiving in the United States always occurs on the fourth Thursday of November).

Procedure

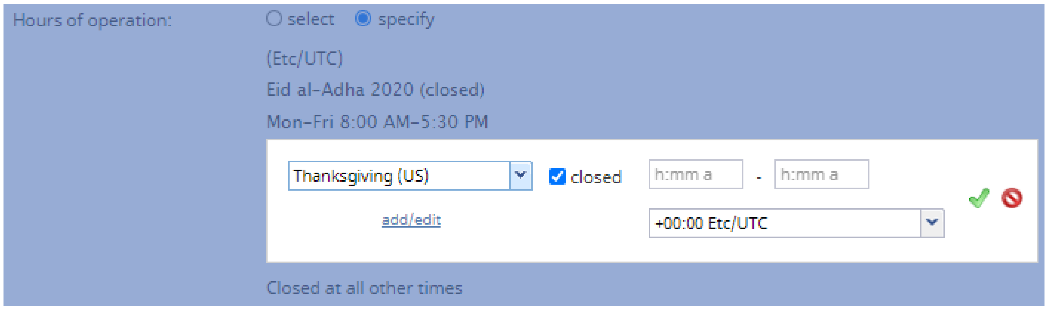
1. Create a Calendar
    - In the Contact Center Administrator application, section [Call Center Configuration > Calendars](), click **Add calendar** to create a new calendar.
    - Give your calendar an appropriate name (e.g., Valentine's Day). For the selection of days, click *'add* to add days. Here, you will have several options to specify frequency:
        - Weekly
        - Monthly
        - Yearly
        - One time
        - Nth day of week of month
    - For holidays that occur on the same date every year, you may choose the *Yearly* option.



    - For holidays that occur at an otherwise specified time, you may choose the *Nth day of week of month* option.
    - When you are finished, click the **green check mark**, and then click **Apply**.



2. Assign the calendar to a service's hours of operation
    - In section [Services & Campaigns > Properties tab](), select a previously configured campaign.
    - For the [Hours of operations]() setting, click **add**. From here, you will be able to select any of the calendars you created.
    - After selecting the desired calendar, you can either specify hours of operation or that the service will be closed. When you are finished defining the hours of operation, click the **green check mark**, and then click **Apply**.

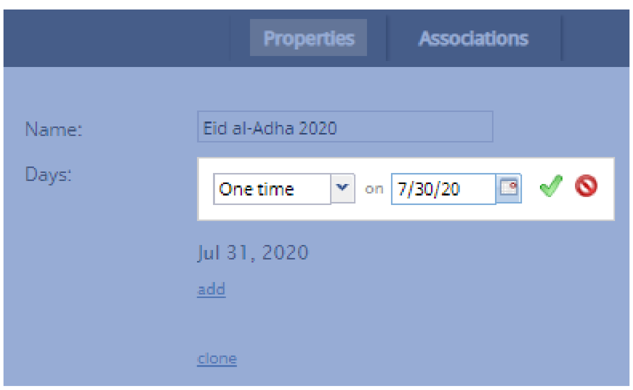


Moving Holidays

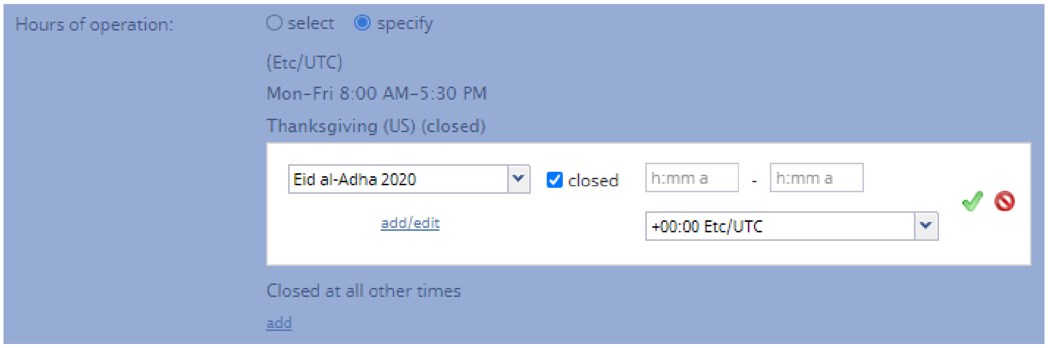
Moving holidays are exceptions that happen on different calendar days every year (e.g., Eid al-Adha, Passover, Chinese New Year, etc.).

Procedure

1. Create a Calendar
   - In the Contact Center Administrator application, section [Call Center Configuration > Calendars](), click **Add calendar** to create a new calendar.
   - Give your calendar an appropriate name (e.g., Passover). For the selection of days, click *'add* to add days. Here, you will have several options to specify frequency:
     - Weekly
     - Monthly
     - Yearly
     - One time
     - Nth day of week of month
   - An ideal option to use for moving holidays, or holidays that span several days, is the *One time* option.
   - When you are finished, click the **green check mark**, and then click **Apply**.



2. Assign the calendar to a service's hours of operation
   - In section [Services & Campaigns > Properties tab](), select a previously configured campaign.
   - For the [Hours of operations]() setting, click **add**. From here, you will be able to select any of the calendars you created.
   - After selecting the desired calendar, you can either specify hours of operation or that the service will be closed.
   - When you are finished defining the hours of operation, click the **green check mark**, and then click **Apply**.



One-Time or Short-Notice Closures

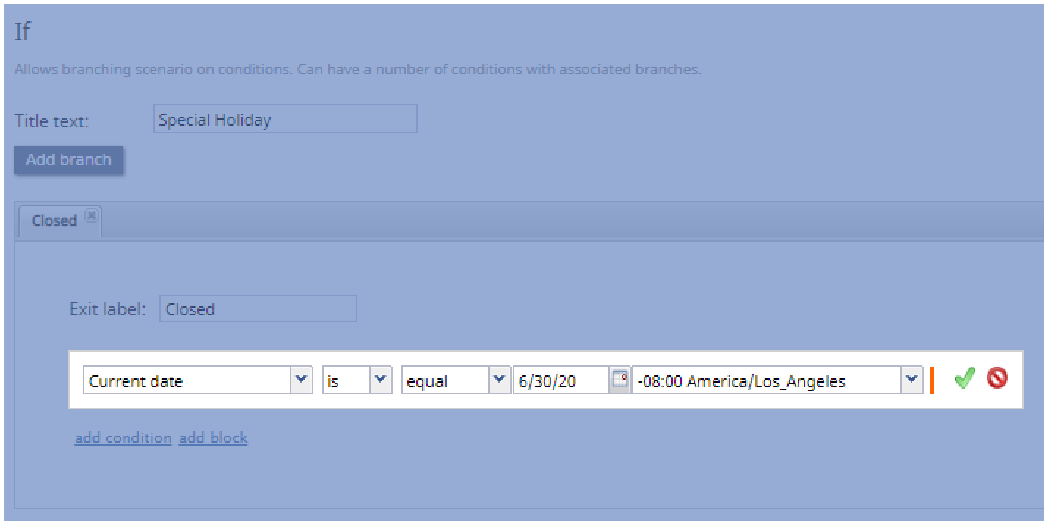
Ideally, you will use calendars and a service's hours of operation to configure the majority of your contact center's holidays. That said, it is not possible to plan in advance for all closure situations (e.g., power outages, natural disasters, slow work days, etc.).

For these short-notice closures, it is possible to configure holiday hours in a scenario directly; this is accomplished by using the If block in the Scenario Builder application.

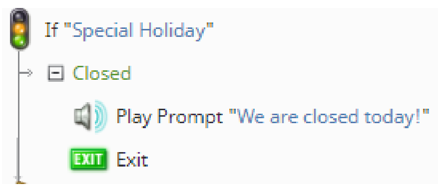
Note: When hours of operation are defined in a scenario, the scenario conditions will override all calendars and service hours of operation. We do **not** recommend using this method solely for configuring exceptions or holiday hours.

Procedure

1. Add an If block to a scenario
   - In the Contact Center Administrator application, section Scenarios, create a new scenario or edit an existing one; this will launch the Scenario Builder application.
   - At the beginning of the scenario, add an If block and create a branch. On this branch, add a condition that uses the Current date or Current date and time option. An example condition could look like this:
     - Current date
     - Is
     - Equal
     - The specified date (e.g., 06/30/20)
     - The specified timezone (e.g., -08:00 America/Los_Angeles)
   - When you are finished, click the **green check mark**.



2. Decide how to route incoming interactions
    - Once the condition is configured, you will decide how to route incoming interactions, such as sending calls to voicemail, routing the calls to a third-party service, playing a specified prompt, and so forth.
    - After deciding how the interactions will be routed, make sure to add an Exit block to end the scenario.



Other Considerations

Always Double-Check Your Settings

Generally speaking, double-checking one's work is always good practice for every profession, in every industry. If you are configuring calendars to account for fixed holidays that occur after a set amount of time or a moving holiday, certain settings should be double-checked.

For example, Thanksgiving in the United States occurs every fourth Thursday in November. Your contact center will have holiday hours on Thanksgiving and the following day. Knowing this, you decide to configure a calendar using the *Nth day of week of month* option. For Thanksgiving, you know it always occurs on the fourth Thursday of November, so you configure that. Then, when accounting for the day after, you configure the fourth Friday of November. You save your calendar and assign it to a service's hours of operation.

Unfortunately, when the day after Thanksgiving rolls around, your contact center receives calls outside of the specified hours. You may wonder what happened? You look at a calendar and realize that while Thanksgiving was the fourth Thursday of November, the following day was the *fifth* Friday of November, and not the fourth.

A careful review of all settings is always advised to prevent things like this from happening.

Regional Routing for Remote Agents

If your contact center has agents working in a remote geographical location, it is possible to route customers calling from the remote location to agents in that same location. There are many benefits to regional routing, including:

- Reducing latency
- Complying with local laws
- Providing an ideal customer experience by connecting calls to agents who speak with the same regional accent and know the specifics of a region.

This tutorial describes how to do the following:

- Assign remote regions to specific agents
- Route incoming remote calls to remote agents using the *Find Agent* scenario block

Prerequisites

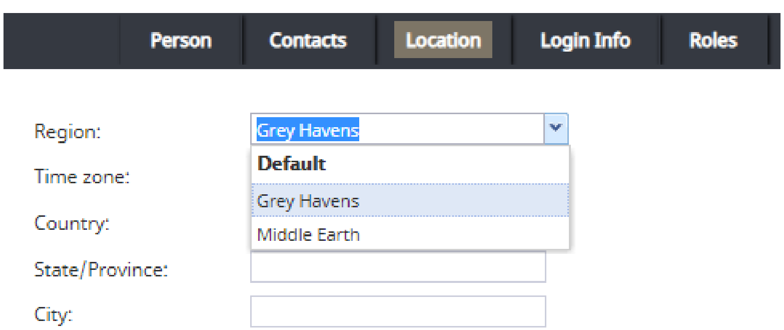
In order for regional routing to remote agents to work in your contact center, your service provider must do the following first:

- Configure the desired region
- Configure this region for the appropriate hosts
- Assign this region to a trunk
- Assign this trunk to an access number for your contact center

Inbound Configuration

1. Assign Specific Agents to the Remote Region

In order to assign specific agents to the remote region, in the Contact Center Administrator application, go to section Users & Teams > Users > Location tab. From the *Region* drop-down menu, select the remote region. Click **Apply** to save your changes.



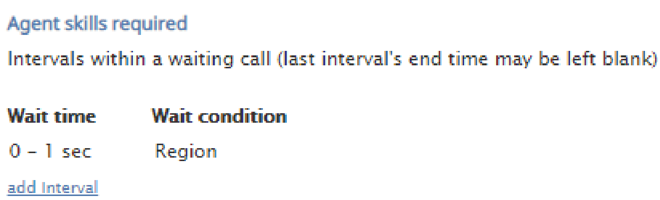
A specific agent assigned to the remote region

2. Configure the "Find Agent" Block to Route Remote Incoming Calls

Next, create a voice scenario in the Scenario Builder application that directs calls from the remote region to agents in the remote region. This is done by configuring the *Find Agent* block with **region** set for the wait condition.

This condition will match the remote region to a user with the same remote region. If no matching region is found for the customer, the interaction will be routed to any user; if no user region is set, the user is matched to any interaction.

Note that you may expand the routing to all agents by defining additional escalation intervals in the *Find Agent* block. For example, after two seconds, you can specify the call to route to agents with higher service skill levels. After five seconds, you can specify that any agent can receive the call.



Configure "region" for the *Find Agent* block's wait condition

Outbound Configuration

If your contact center prefers remote agents to use remote access numbers only (i.e., for both inbound and outbound interactions), you may configure an outbound service with the desired access number. This is particularly useful for contact centers looking for more granularity in reporting.

For example, when a remote agent selects the "Remote Outbound Service" to dial out, that service's "from" phone number will be linked to the remote region's trunk (i.e., access number).

Warm Transfer to Third Party Caller ID Tutorial

These instructions will guide a caller on how to use a warm transfer to move a customer to a third party agent while providing the customer's caller ID to the third party instead of your own Caller ID phone number.

This tutorial describes how to do the following:

- Configure the Contact Center Administrator to allow for the transfer of Caller ID information
- Receive a phone call from a customer
- Use a warm transfer to connect the customer to a third party
- Closing out the call

Prerequisites

In order to complete this tutorial, you will need to do the following first:

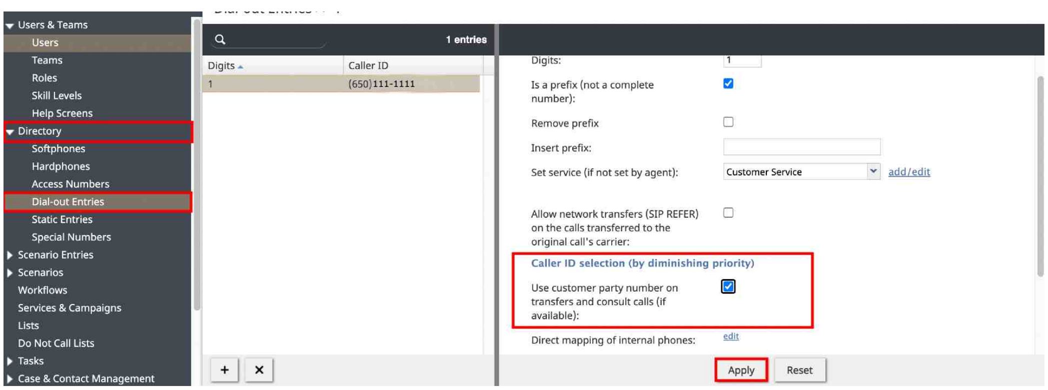
If you have not done so already, contact Customer Success to allow for arbitrary Caller ID passthrough.

Procedure

Contact Center Administrator Setup

This part of the tutorial explains how to set up the Contact Center Administrator in order to later warm transfer to a known number.

1. Sign in to the Bright Pattern Contact Center Administrator.
2. Click on the *Configuration* tab.
3. Open the *Directory* menu on the left hand side by clicking the arrow.
4. Click on *Dial-out Entries*.
5. The *Dial-out Entries* menu has several options within the right hand pane.
6. Scroll down to *Caller ID selection (by diminishing priority).*
7. The first option beneath the *Caller ID selection (by diminishing priority)* sub-section is a checkbox labeled “Use customer party number on transfers and consult calls (if available):”.
8. Check the checkbox.
9. Press *Apply*.



Transferring the client's phone number to the new agent's Caller ID will not occur if this checkbox is not checked. ALT: Screenshot of the Caller ID selection checkbox with specific checkbox indicated.

Agent Desktop Process

This tutorial explains how to warm transfer a customer call from the Agent Desktop to a new number and then leave the call.

1. Sign in to the Bright Pattern Agent Desktop.

2. In the *[User Status Indicator Selector](#)*, set your status as *Ready*.
3. When you have received a phone call that you wish to transfer, open the *[Consult, Conference, Blind transfer](#)* window.
4. Select a recipient or enter the phone number or extension of the party you are transferring the call to in the number field.
5. Click on the dropdown menu and select the *dial as conference*  button.
6. From here, all parties will be active on the call and all conference participants will be displayed in the *[Contact Info Panel](#)*.
7. When you are satisfied that the customer and transfer agent are connected properly, it is time to leave the call.
    - Note: You can only leave your own conference when it has three participants.
8. To leave the conference, click the *Leave*  button. You will be disconnected while the two remaining parties will carry on with a regular two-way call.