



Version 5.2.2

Bright Pattern Documentation

Generated: 8/13/2022 1:07 am

Content is available under license unless otherwise noted.

Table of Contents

Table of Contents	2
General Information About Quality Management	4
How to Review Call Recordings, Chat Transcripts, and Email	4
Recording Availability	4
Proactive Offer	5
Proactive Offer Properties	5
Enabled	5
HTML Content	5
Contact options	5
Chat button enabled	5
Chat button text	5
Phone call button enabled	6
Phone call button text	6
Cancel button text	6
Close button	6
Proactive Offer Styling	6
Width	7
Height	7
Animation in	7
Animation out	7
Location	7
Proactive Offer Conditions	7
How to Add Conditions	8
Condition Types	8
Max wait time, over	8
URL path prefix matches	8
URL path prefix in history	9
Days of week	9
Days of month	9
Months	9
Time of day	9
Cookie is present	9
Referring URL	9
Duration of visit over	9
Number of pages visited	9
About to exit (mouse move)	9
First visit to the site	9
Chatted before	9
JS variable is true	9
Language	10
Scrolls to	10
Mobile visitor	10
Number of clicks on page over	10
Pre-Chat Form Configuration	10
Proactive Offer	11
Proactive Offer Properties	11
Enabled	11
HTML Content	11
Contact options	11
Chat button enabled	11
Chat button text	12
Phone call button enabled	12
Phone call button text	12
Cancel button text	12
Close button	12
Proactive Offer Styling	12
Width	13
Height	13
Animation in	13
Animation out	13
Location	13
Proactive Offer Conditions	13
How to Add Conditions	14
Condition Types	14
Max wait time, over	14
URL path prefix matches	14
URL path prefix in history	15
Days of week	15
Days of month	15
Months	15
Time of day	15
Cookie is present	15
Referring URL	15
Duration of visit over	15

Number of pages visited	15
About to exit (mouse move)	15
First visit to the site	15
Chatted before	15
JS variable is true	15
Language	16
Scrolls to	16
Mobile visitor	16
Number of clicks on page over	16
Pre-Chat Form Configuration	16

General Information About Quality Management

In contact centers, quality management usually refers to the assessment of the quality of agent work via reviewing the available call and screen recordings, chat transcripts, and email messages. In Bright Pattern Contact Center, the results of such reviews can be expressed using a number of customizable [grading categories](#), such as politeness and knowledge.

In this *Reporting Reference Guide*, Quality Management sections [Call Recordings](#), [Chat Transcripts](#), [Email Messages](#), and [Screen Recordings](#) relate to the data provided in the Interaction Records [Search Results](#).

How to Review Call Recordings, Chat Transcripts, and Email

To review call recordings, chat transcripts, or email messages, first select the desired interactions as described in section [Interaction Records Search](#). The search conditions depend on your quality management practices. For example, if quality monitoring is based on random checks of agent recordings or transcripts, it is usually sufficient to define the agent's username and the desired time frame as your search conditions. If, on the other hand, you follow-up on a specific customer complaint, your search conditions may contain the customer's phone number, service name, and time frame.

When all desired search conditions are specified, click the **Search** button. The *Search Results* page will open with the list of interaction records matching your search criteria. If a particular interaction has been previously reviewed and rated, the user name will appear in the *Reviewed by* column.

	02/06/17 08:3...	1025	scenario_engine	0:29	record vs	david...	1	99031295-8644-4CD7-4837-53DC...	
	02/06/17 08:3...	1025	scenario_engine	0:09	record vs	david...	1	37CD625C-9568-45A4-8EA3-DB33...	
	02/06/17 11:5...	24.143.248.50	Chat Scenario	15:10	Chat New Cha...	allen.f...	1	8758D674-7E45-4D00-83CB-4D06...	
	02/06/17 02:5...	24.143.248.50	Chat Scenario	0:26	Chat New Cha...	allen.f...	1	A293A486-181E-4403-8179-C8F9...	
	02/06/17 03:3...	1002	12482680325	12482680325	0:08	default b Inbound...	allen.f...	1	6C2007DA-298E-4E87-8358-6684...
	02/06/17 03:5...	24.143.248.50	Chat Scenario	28:43	Chat New Cha...	allen.h...	1	97F64C26-ED3F-49D1-A5C1-598C...	
	02/06/17 04:2...	24.143.248.50	Chat Scenario	32:39	Chat New Cha...	allen.h...	2	8A1C6C20-CD88-4048-8634-F3A9...	
	02/07/17 03:3...	1043	16317298506	16317298506	1:03:28	default b Inbound...	allen.h...	1	C18B1346-AF6F-4EB4-AF30-0DF2D...
	02/08/17 08:5...	1043	18722403311	18722403311	4:44	default b Inbound...	allen.h...	1	772647AA-3685-49FF-A4DA-E40BF...

The Search Results page displays all interaction information

Recording Availability

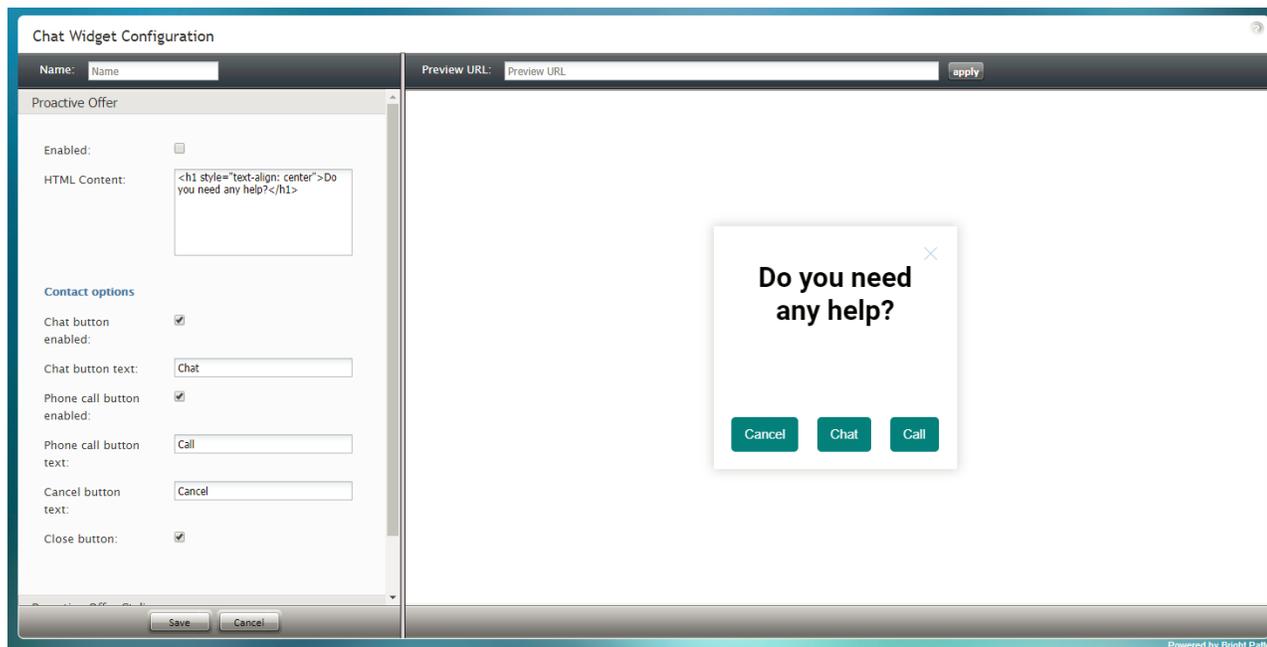
For phone calls, the availability of a recording for a particular call will be indicated by the audio icon in the *Recording* column. The percentage of recorded calls is specified in your [contact center configuration](#) and can be redefined for each [service](#) and each [individual agent](#) separately. If not all calls in your contact center are recorded, you can use filter *has recording* to limit your search results to call records that actually have recordings.

For chat interactions, the availability of a chat transcript is indicated by the messaging icon in the *Recording* column. Bright Pattern Contact Center unconditionally records transcripts for all chat service interactions and stores them for the same amount of time as the corresponding interaction records themselves. Therefore, you do not need to use any special filters to get access to chat interactions with transcripts.

Proactive Offer

Proactive offers are chat interactions initiated by your contact center that offer opportunities to call or chat with a live agent. The contents of the proactive chats are customized in the Proactive Offer tab of chat widget configuration.

Proactive Offer Properties



Chat Widget Configuration > Proactive Offer tab

Enabled

To enable proactive offers for your chat service, select the *Enabled* checkbox.

HTML Content

HTML Content is the HTML code that is pasted here to provide access to the web elements of the chat application that customers will use to access your contact center via the given messaging scenario entry.

Contact options

There are two ways for customers to contact your call center: chat and phone calls. Contact options to be shown on the chat widget include the following.

Chat button enabled

To enable the chat button to appear on the widget, select the *Chat button enabled* checkbox. When the customer clicks the chat button, a new chat interaction will be initiated.

Chat button text

The chat button's label can be customized to display any text or brief message (e.g., "Chat with us now"). Type your desired chat button label in the *Chat button text* field.

Phone call button enabled

To enable the phone call button to appear on the widget, select the *Phone call button enabled* checkbox. When the customer clicks the phone call button, the agent accepts the chat and can call the customer's provided phone number using the **Initiate call** button.

Phone call button text

The phone call button's label can be customized to display any text or brief message (e.g., "Speak to an agent"). Type your desired phone call button label in the *Phone call button text* text entry field.

Cancel button text

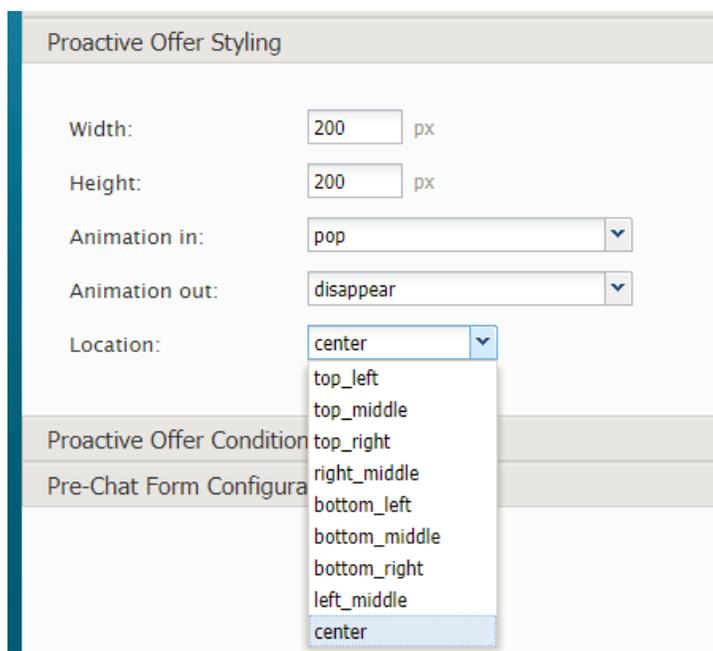
The *Cancel button text* may be customized as well. Enter the desired text or brief message in the text entry field. When the customer clicks the cancel button, the proactive offer chat will not be initiated.

Close button

When clicked by the customer, the *Close button* closes the proactive chat window and hides it from view. To enable customers to close the chat widget, select the **Close button** checkbox.

Proactive Offer Styling

The following properties relate to Proactive Offer styling.



The image shows a configuration panel titled "Proactive Offer Styling". It contains several settings:

- Width: 200 px
- Height: 200 px
- Animation in: pop
- Animation out: disappear
- Location: center

A dropdown menu is open for the "Location" setting, showing the following options: top_left, top_middle, top_right, right_middle, bottom_left, bottom_middle, bottom_right, left_middle, and center. The "center" option is currently selected.

Proactive Offer Styling properties

Width

The widget *width* can be specified in pixels.

Height

The widget *height* can be specified in pixels.

Animation in

You can specify how the proactive chat widget moves across or appears on the screen.

Choose from the following *Animation in* options:

- pop
- slide from left
- slide from right
- slide from top
- slide from bottom

Animation out

You can also specify how the proactive chat widget moves off the screen.

Choose from the following *Animation out* options:

- disappear
- fade out
- slide to left
- slide to right
- slide to top
- slide to bottom

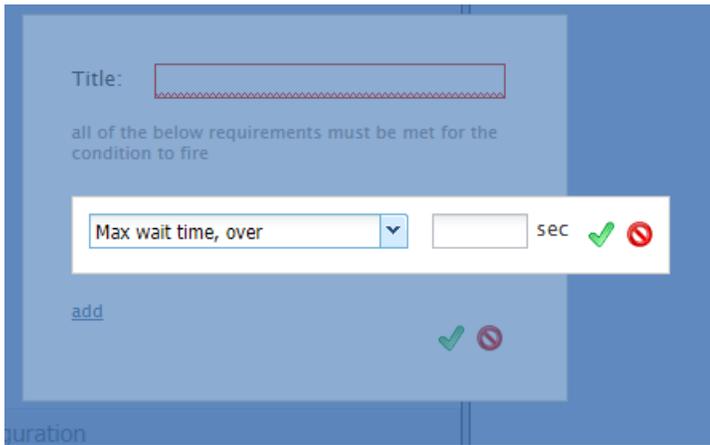
Location

Location is where the chat widget will be placed on your webpage:

- top_left
- top_middle
- top_right
- right_middle
- bottom_left
- bottom_middle
- bottom_right
- left_middle
- center

Proactive Offer Conditions

Proactive Offer conditions are the requirements that must be met for the proactive chat to be shown to website visitors.



Add proactive offer conditions

How to Add Conditions

1. Beside "Conditions," click **add**.
2. In the dialog that pops up, enter the *title*, the unique name for this condition.
3. Click **add**.
4. Select a condition with the appropriate specification.

Condition Types

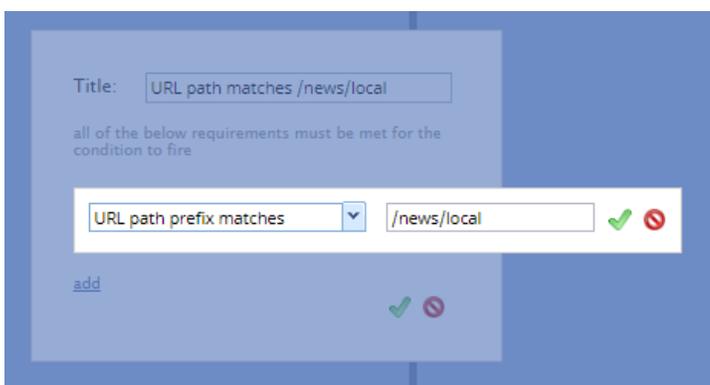
Max wait time, over

Define the maximum number of seconds to wait before sending the proactive offer.

URL path prefix matches

Specify the URL prefix (e.g., /folder1) that must be matched.

This condition is useful for when you wish to pop a proactive offer only when a visitor navigates to a specific webpage. The webpage URL prefix is the path of that page (i.e., everything that follows <https://www.domain>). For example, specifying URL prefix */news/local* will ensure that the proactive offer is only shown when the visitor goes to the local news page.



"URL path prefix matches" condition

URL path prefix in history

Specify the URL prefix (e.g., /folder1) from history.

Days of week

Select the day(s) of the week to send the proactive offer.

Days of month

Select the day(s) of the month to send the proactive offer.

Months

Select the month(s) to send the proactive offer.

Time of day

Select the time of day you want to send the proactive offer; you may configure a time range in *hours:minutes* during which the offer appears. Note that the time of day is the customer's time in their own desktop and not your contact center time.

Cookie is present

Enter the cookie that must be present.

Referring URL

Specify the URL that referred the customer to your site.

Duration of visit over

Define the maximum number of seconds that the customer should be on your site before sending the offer.

Number of pages visited

Enter the number of webpages visited.

About to exit (mouse move)

Add this condition to send the proactive offer when there's a mouse move to exit.

First visit to the site

Add this condition if it's the first time the customer has been to your site.

Chatted before

Add this condition if the customer has chatted with your contact center before.

JS variable is true

Specify which JavaScript variable needs to be true.

Language

Specify which language the customer uses.

Scrolls to

Enter the number of screens down that the customer browses.

Mobile visitor

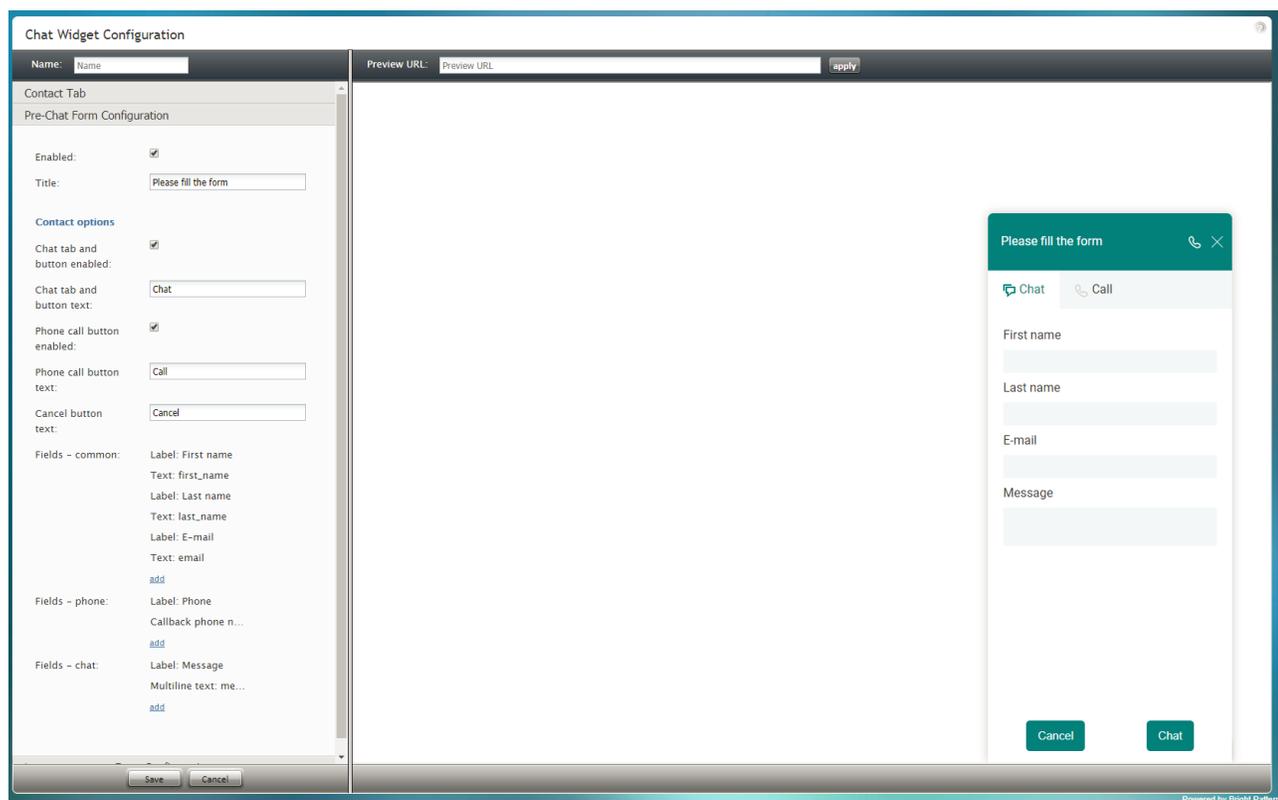
Add this condition if the customer is on your website via a mobile browser.

Number of clicks on page over

Enter the maximum number of clicks that the customer should make.

Pre-Chat Form Configuration

Learn about the properties for [Pre-Chat Form Configuration](#).



The screenshot displays the 'Chat Widget Configuration' interface. On the left, the 'Pre-Chat Form Configuration' section is active, showing various settings:

- Enabled:**
- Title:**
- Contact options:**
 - Chat tab and button enabled:**
 - Chat tab and button text:**
 - Phone call button enabled:**
 - Phone call button text:**
 - Cancel button text:**
- Fields - common:**
 - Label: First name
 - Text: first_name
 - Label: Last name
 - Text: last_name
 - Label: E-mail
 - Text: email
 - [add](#)
- Fields - phone:**
 - Label: Phone
 - Callback phone n...
 - [add](#)
- Fields - chat:**
 - Label: Message
 - Multiline text: me...
 - [add](#)

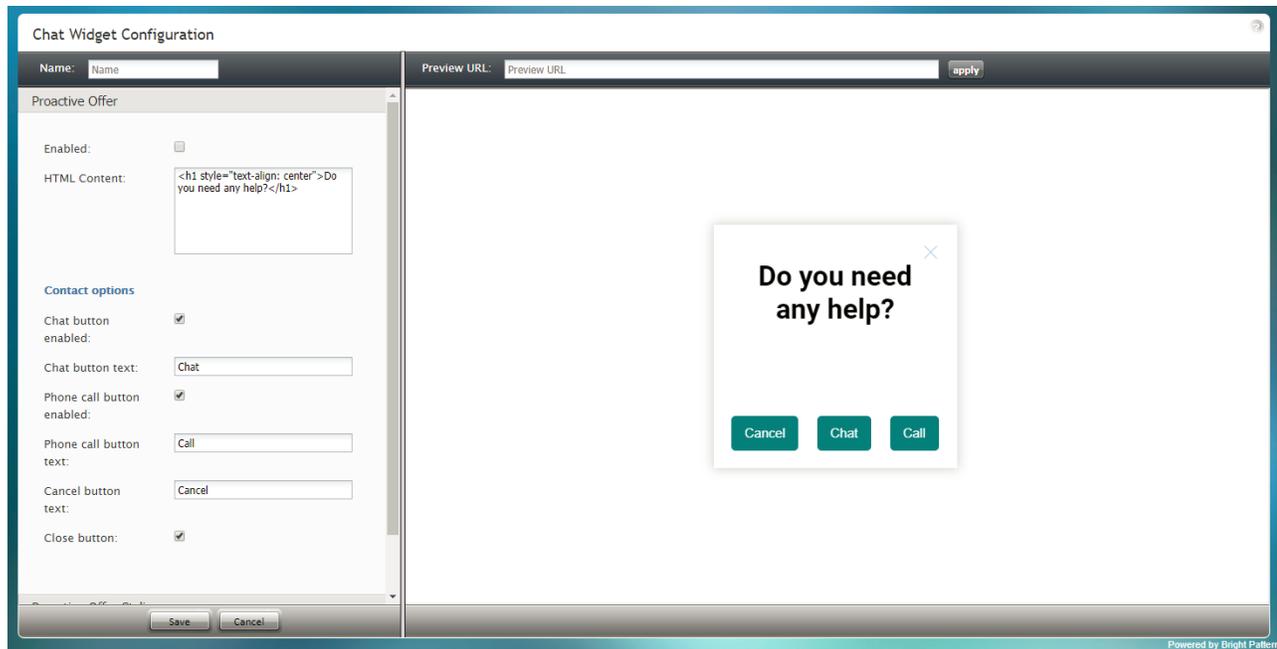
At the bottom of the configuration panel are 'Save' and 'Cancel' buttons. The right side of the interface shows a 'Preview URL' field and a preview of the chat form. The preview form has a title 'Please fill the form' and a green header with 'Chat' and 'Call' buttons. The form fields include 'First name', 'Last name', 'E-mail', and 'Message'. At the bottom of the preview are 'Cancel' and 'Chat' buttons. The interface is powered by Bright Pattern.

Pre-Chat Form Configuration

Proactive Offer

Proactive offers are chat interactions initiated by your contact center that offer opportunities to call or chat with a live agent. The contents of the proactive chats are customized in the Proactive Offer tab of chat widget configuration.

Proactive Offer Properties



Chat Widget Configuration > Proactive Offer tab

Enabled

To enable proactive offers for your chat service, select the *Enabled* checkbox.

HTML Content

HTML Content is the HTML code that is pasted here to provide access to the web elements of the chat application that customers will use to access your contact center via the given messaging scenario entry.

Contact options

There are two ways for customers to contact your call center: chat and phone calls. Contact options to be shown on the chat widget include the following.

Chat button enabled

To enable the chat button to appear on the widget, select the *Chat button enabled* checkbox. When the customer clicks the chat button, a new chat interaction will be initiated.

Chat button text

The chat button's label can be customized to display any text or brief message (e.g., "Chat with us now"). Type your desired chat button label in the *Chat button text* field.

Phone call button enabled

To enable the phone call button to appear on the widget, select the *Phone call button enabled* checkbox. When the customer clicks the phone call button, the agent accepts the chat and can call the customer's provided phone number using the **Initiate call** button.

Phone call button text

The phone call button's label can be customized to display any text or brief message (e.g., "Speak to an agent"). Type your desired phone call button label in the *Phone call button text* text entry field.

Cancel button text

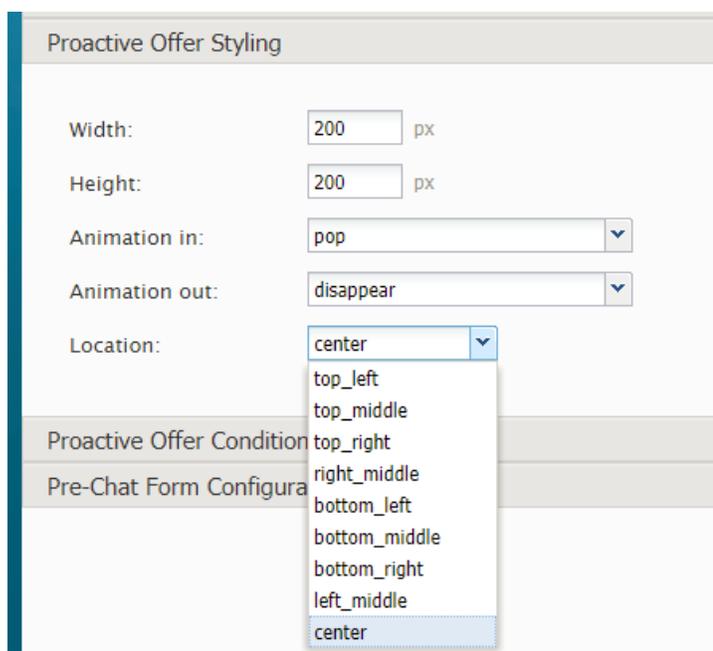
The *Cancel button text* may be customized as well. Enter the desired text or brief message in the text entry field. When the customer clicks the cancel button, the proactive offer chat will not be initiated.

Close button

When clicked by the customer, the *Close button* closes the proactive chat window and hides it from view. To enable customers to close the chat widget, select the **Close button** checkbox.

Proactive Offer Styling

The following properties relate to Proactive Offer styling.



The image shows a configuration panel titled "Proactive Offer Styling". It contains several settings:

- Width: 200 px
- Height: 200 px
- Animation in: pop
- Animation out: disappear
- Location: center

A dropdown menu for the Location setting is open, showing the following options: top_left, top_middle, top_right, right_middle, bottom_left, bottom_middle, bottom_right, left_middle, and center. The "center" option is currently selected.

Proactive Offer Styling properties

Width

The widget *width* can be specified in pixels.

Height

The widget *height* can be specified in pixels.

Animation in

You can specify how the proactive chat widget moves across or appears on the screen.

Choose from the following *Animation in* options:

- pop
- slide from left
- slide from right
- slide from top
- slide from bottom

Animation out

You can also specify how the proactive chat widget moves off the screen.

Choose from the following *Animation out* options:

- disappear
- fade out
- slide to left
- slide to right
- slide to top
- slide to bottom

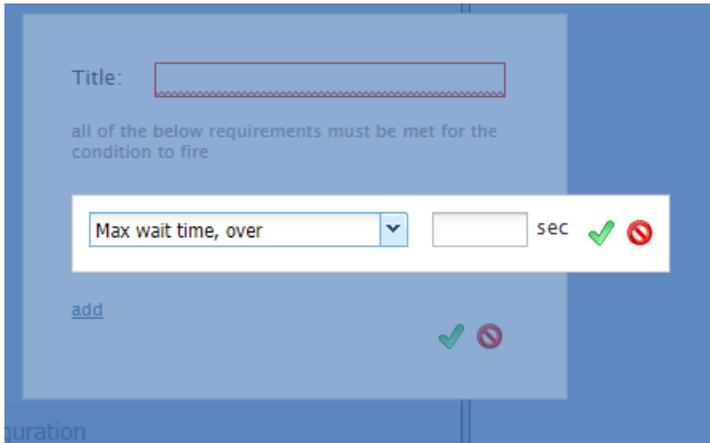
Location

Location is where the chat widget will be placed on your webpage:

- top_left
- top_middle
- top_right
- right_middle
- bottom_left
- bottom_middle
- bottom_right
- left_middle
- center

Proactive Offer Conditions

Proactive Offer conditions are the requirements that must be met for the proactive chat to be shown to website visitors.



Add proactive offer conditions

How to Add Conditions

1. Beside "Conditions," click **add**.
2. In the dialog that pops up, enter the *title*, the unique name for this condition.
3. Click **add**.
4. Select a condition with the appropriate specification.

Condition Types

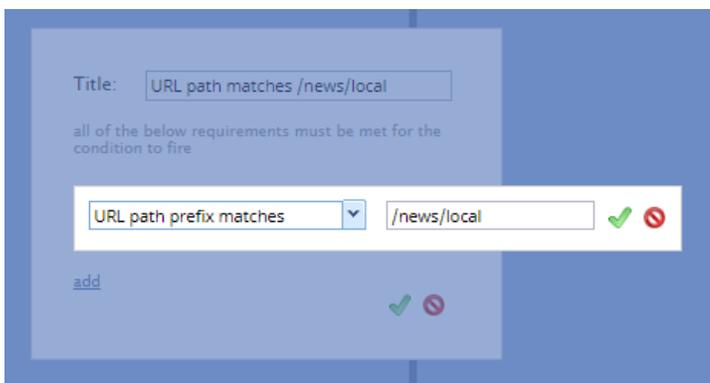
Max wait time, over

Define the maximum number of seconds to wait before sending the proactive offer.

URL path prefix matches

Specify the URL prefix (e.g., /folder1) that must be matched.

This condition is useful for when you wish to pop a proactive offer only when a visitor navigates to a specific webpage. The webpage URL prefix is the path of that page (i.e., everything that follows <https://www.domain>). For example, specifying URL prefix */news/local* will ensure that the proactive offer is only shown when the visitor goes to the local news page.



"URL path prefix matches" condition

URL path prefix in history

Specify the URL prefix (e.g., /folder1) from history.

Days of week

Select the day(s) of the week to send the proactive offer.

Days of month

Select the day(s) of the month to send the proactive offer.

Months

Select the month(s) to send the proactive offer.

Time of day

Select the time of day you want to send the proactive offer; you may configure a time range in *hours:minutes* during which the offer appears. Note that the time of day is the customer's time in their own desktop and not your contact center time.

Cookie is present

Enter the cookie that must be present.

Referring URL

Specify the URL that referred the customer to your site.

Duration of visit over

Define the maximum number of seconds that the customer should be on your site before sending the offer.

Number of pages visited

Enter the number of webpages visited.

About to exit (mouse move)

Add this condition to send the proactive offer when there's a mouse move to exit.

First visit to the site

Add this condition if it's the first time the customer has been to your site.

Chatted before

Add this condition if the customer has chatted with your contact center before.

JS variable is true

Specify which JavaScript variable needs to be true.

Language

Specify which language the customer uses.

Scrolls to

Enter the number of screens down that the customer browses.

Mobile visitor

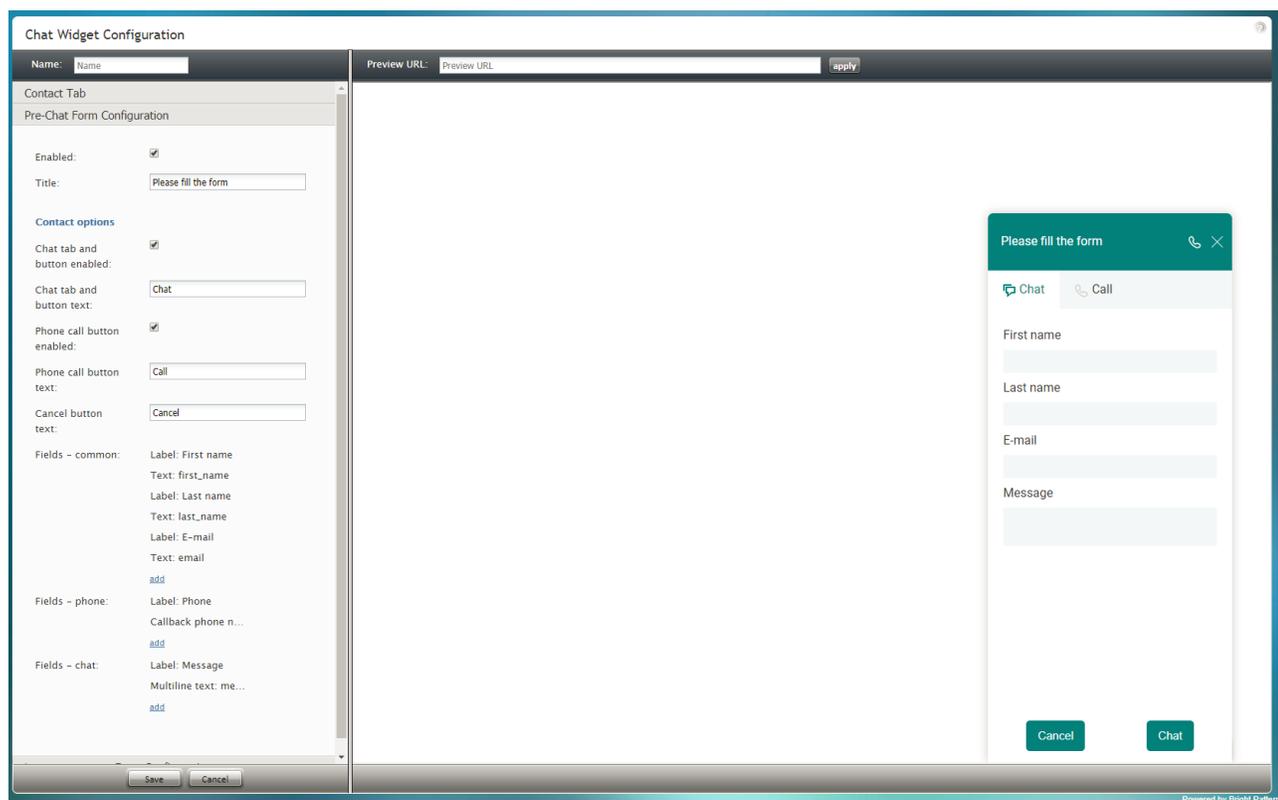
Add this condition if the customer is on your website via a mobile browser.

Number of clicks on page over

Enter the maximum number of clicks that the customer should make.

Pre-Chat Form Configuration

Learn about the properties for [Pre-Chat Form Configuration](#).



The screenshot displays the 'Chat Widget Configuration' interface. On the left, the 'Pre-Chat Form Configuration' section is active, showing various settings:

- Enabled:**
- Title:**
- Contact options:**
 - Chat tab and button enabled:**
 - Chat tab and button text:**
 - Phone call button enabled:**
 - Phone call button text:**
 - Cancel button text:**
- Fields - common:**
 - Label: First name
 - Text: first_name
 - Label: Last name
 - Text: last_name
 - Label: E-mail
 - Text: email
 - [add](#)
- Fields - phone:**
 - Label: Phone
 - Callback phone n...
 - [add](#)
- Fields - chat:**
 - Label: Message
 - Multiline text: me...
 - [add](#)

At the bottom of the configuration panel are 'Save' and 'Cancel' buttons. The right side of the interface shows a 'Preview URL' field and a preview of the chat form. The preview form has a title 'Please fill the form' and a green header with 'Chat' and 'Call' buttons. The form fields include 'First name', 'Last name', 'E-mail', and 'Message'. At the bottom of the preview are 'Cancel' and 'Chat' buttons. The interface is powered by Bright Pattern.

Pre-Chat Form Configuration

