



Version 5.3.17

Bright Pattern Documentation

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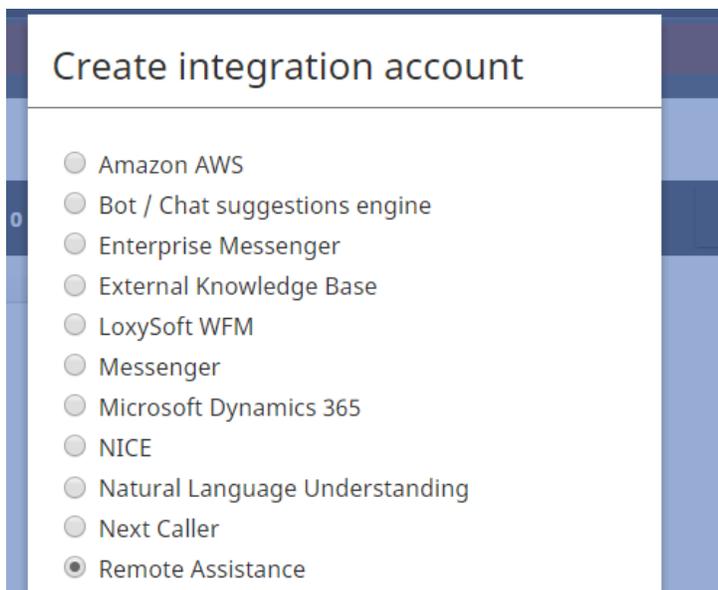
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Remote Assistance Integration

Remote Assistance integration adds remote desktop support and mobile device support to Bright Pattern Contact Center voice or chat service interactions.

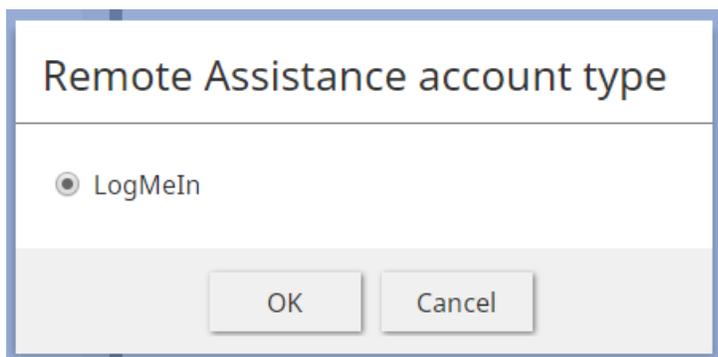
How to Add a New Remote Assistance Integration Account

1. In the Contact Center Administrator application, go to section *Configuration > Call Center Configuration > Integration Accounts*.
2. Click + to add a **Remote Assistance** integration account.



Select "Remote Assistance" integration account

3. Select account type **LogMeIn Rescue**.

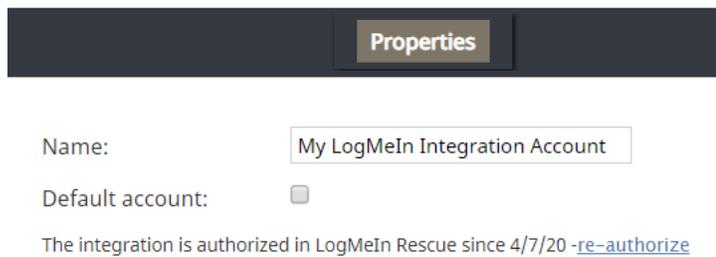


Select "LogMeIn Rescue"

4. Complete the account properties.
5. Click **Apply** at the bottom of the screen to save your changes.

Properties

The properties of the LogMeIn Rescue type of integration account are described as follows.



The screenshot shows a dark-themed dialog box with a 'Properties' button. Below the button, there is a 'Name:' label followed by a text input field containing 'My LogMeIn Integration Account'. Below that is a 'Default account:' label followed by an unchecked checkbox. At the bottom, there is a text line: 'The integration is authorized in LogMeIn Rescue since 4/7/20 -[re-authorize](#)'.

LogMeIn Rescue integration account properties

Name

The name of the integration account (any name).

Default account

Select the checkbox to set this integration account as the default Remote Assistance account.

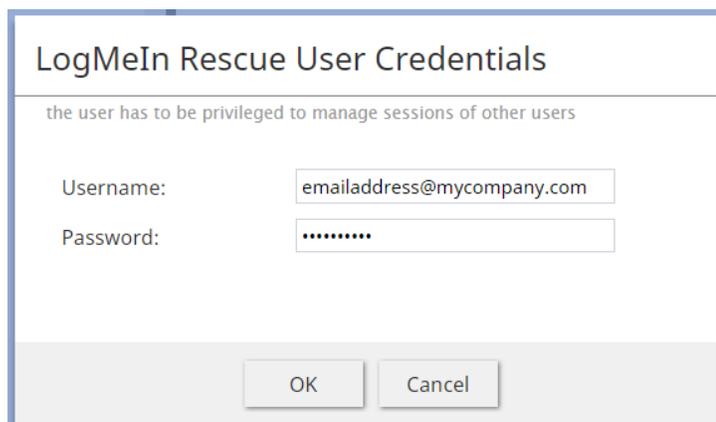
authorize

When you first create the integration account, the properties page will display *The integration is not authorized in LogMeIn Rescue.*

Authorization is required for contact centers that allow agents to provide remote assistance during voice and chat services.

Click **authorize** and you will be prompted to set the credentials that the master administrator of LogMeIn Rescue uses to log in to the Rescue Technician Console application.

Note that for this integration, the **master administrator cannot also be a technician**, as the user's email address is used for establishing remote sessions (see *Username* description below).



The screenshot shows a dialog box titled 'LogMeIn Rescue User Credentials'. Below the title is a note: 'the user has to be privileged to manage sessions of other users'. There are two input fields: 'Username:' with the value 'emailaddress@mycompany.com' and 'Password:' with a masked password '.....'. At the bottom, there are 'OK' and 'Cancel' buttons.

LogMeIn Rescue User Credentials

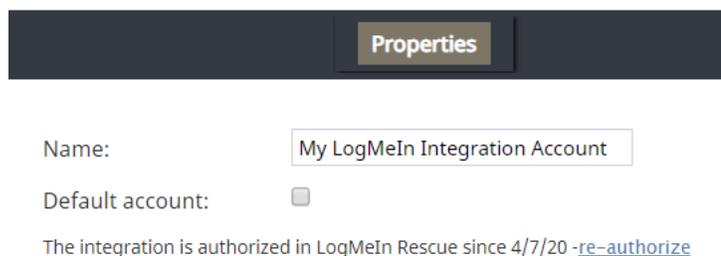
Username

The email address of the user who has administrator-level access to the LogMeIn Rescue Technician Console application. The identity of this user is used for setting up and starting sessions for other users/technicians.

Password

Your password for the Rescue Technician Console.

After setting the credentials, the integration account properties page will show that you are authorized to use the account. You may click **re-authorize** to enter your LogMeIn credentials again, if needed.



Name:

Default account:

The integration is authorized in LogMeIn Rescue since 4/7/20 -[re-authorize](#)

LogMeIn Rescue integration account properties

Learn More

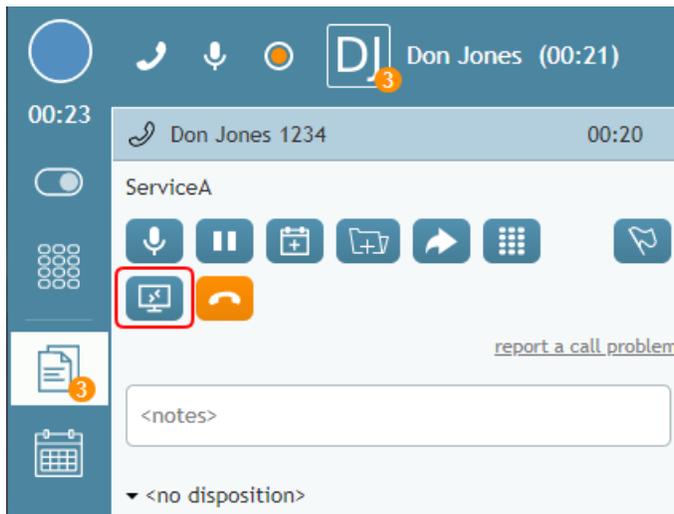
For more information on LogMeIn integration configuration and usage, see [LogMeIn Integration Quick Start](#).

How to Start Remote Assistance During a Phone Call

During a phone call with a customer, you can provide immediate hands-on help with the click of a button. The following procedure describes what you and the customer will do to start a remote assistance session via LogMeIn Rescue on either a desktop or mobile device.

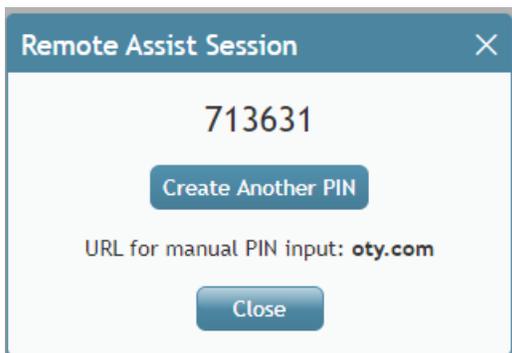
Procedure

1. Make sure you are logged in to the LogMeIn Rescue Technician Console.
2. While on a service call, click the **Start remote assistance**  button.



During an active service call, click "Start remote assistance"

3. The *Remote Assist Session* dialog will be popped to Agent Desktop. This window displays the following:
 1. **The Numeric PIN code** (e.g., "123456") - The PIN is needed for starting the remote assistance session.
 2. **Create Another PIN** - Clicking this button will generate a new PIN number.
 3. **URL for manual PIN input: oty.com** - This is the URL that the customer will use for entering the PIN code.
 4. **Close** - Clicking this button will close the Remote Assist Session dialog, removing it from your Agent Desktop screen.



Example of the Remote Assist Session dialog

4. Instruct the customer to type the URL into the address bar of their web browser and enter the PIN number.
5. Once the customer has successfully entered the PIN number on that page, then the LogMeIn application for either desktop devices (Mac/Win) or mobile devices (Android/iOS) will either be downloaded or will be opened in the App Store or Google Play for downloading.

What Happens Next

If the Customer Is on a Desktop Device

1. The page will open for the customer and will begin downloading the *Support-LogMeInRescue* application (Mac/Win). The customer will then open the app and give the required permission.
2. At the same time, you, the agent who is logged in to the LogMeIn Rescue Technician Console, will receive a sound notification in the console, and you will see that there is a new remote desktop session with status "Waiting."
3. Select the session in the application and click **Start Session**.
4. Then select either **Remote control session** to control and make changes to the customer's desktop, or **viewing session** to observe the customer's desktop only.
5. The remote assistance session is established.
6. During the remote assistance session, you and the customer can continue talking on the phone.

If the Customer Is on a Mobile Device

1. The LogMeIn *Rescue + Mobile* app will be shown in the App Store or Google Play. The customer should download and launch the app. Then, the customer will enter the PIN manually.
2. At the same time, you, the agent who is logged in to the LogMeIn Rescue Technician Console, will receive a sound notification in the console, and you will see that there is a new remote desktop session with status "Waiting."
3. Select the session in the application and click **Start Session**.
4. The remote assistance session is established, and you can then observe the customer's mobile device screen only. For mobile devices, you cannot control or make changes.
5. During the remote assistance session, you and the customer can continue talking on the phone.

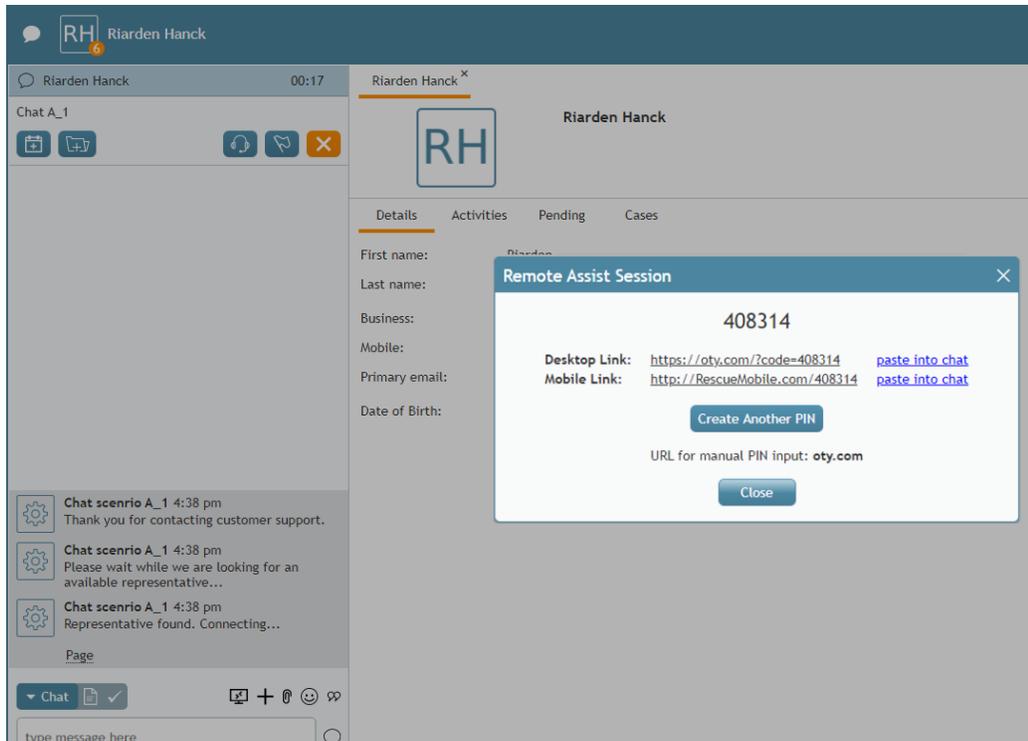
How to Start Remote Assistance During a Chat/SMS/Messaging Session

You can provide immediate hands-on help during an active chat, SMS, or messaging session with the click of a button. The following procedure describes what you and the customer will do to start a remote assistance session via LogMeIn Rescue on either a desktop or mobile device.

Procedure

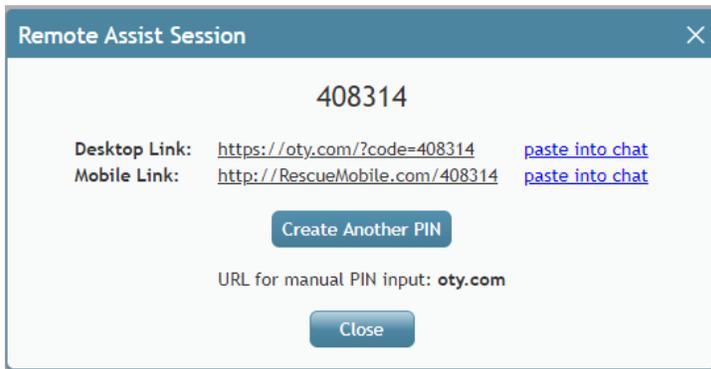
1. Ask the customer if they are on a desktop computer or a mobile device, so you know which link to provide them with in later steps.

2. Make sure you are logged in to the LogMeIn Rescue Technician Console.
3. In the chat window, click the **Start remote assistance**  button.
4. The *Remote Assist Session* dialog will be popped to Agent Desktop.



Example of Remote Assist Session dialog on screen

5. The Remote Assist Session dialog displays the following:
 1. **The Numeric PIN code** (e.g., "123456") - The PIN is needed for starting the remote assistance session.
 2. **Desktop Link** (e.g., "<https://oty.com/?code=123456>") that includes the PIN. This link is for customers who are on a desktop device (Mac/Win). Clicking **paste into chat** will place this link in the chat window's text input field for sending to the customer. Note that you must click the **Send** button to send the link to the customer.
 3. **Mobile Link** (e.g., "<https://RescueMobile.com/123456>") that includes the PIN. This link is for customers who are on a mobile device (iOS/Android). Clicking **paste into chat** will place this link in the chat window's text input field for sending to the customer. Note that you must click the **Send** button to send the link to the customer.
 4. **Create Another Pin** - Clicking this button will generate new links and a new PIN number.
 5. **URL for manual PIN input: oty.com** - This URL can be used for entering the PIN code, instead of the above links.
 6. **Close** - Clicking this button will close the Remote Assist Session dialog, removing it from your Agent Desktop screen.



Remote Assist Session dialog

6. Make sure that the links are pasted into the chat and are sent to the customer.
7. Instruct the customer to select the appropriate link for their device, and tell them that clicking the link will begin downloading a LogMeIn application on their device. If needed, the customer can use the **oty.com** URL to enter the PIN code manually.

What Happens Next

If the Customer Clicks the Desktop Link

1. The page will open for the customer and will begin downloading the *Support-LogMeInRescue* application (Mac/Win). The customer will then open the app and give the required permission.
2. At the same time, you, the agent who is logged in to the LogMeIn Rescue Technician Console, will receive a sound notification in the console, and you will see that there is a new remote desktop session with status "Waiting."
3. Select the session in the application and click **Start Session**.
4. Then select either **Remote control session** to control and make changes to the customer's desktop, or **viewing session** to observe the customer's desktop only.
5. The remote assistance session is established.
6. During the remote assistance session, you and the customer can continue chatting.

If the Customer Clicks the Mobile Link

1. The LogMeIn *Rescue + Mobile* app will be shown in the App Store or Google Play. The customer should download and launch the app. Then, the customer will enter the PIN manually or click the displayed link again, which will be auto-filled with the PIN.
2. At the same time, you, the agent who is logged in to the LogMeIn Rescue Technician Console, will receive a sound notification in the console, and you will see that there is a new remote desktop session with status "Waiting."

3. Select the session in the application and click **Start Session**.
4. The remote assistance session is established, and you can then observe the customer's mobile device screen only. For mobile devices, you cannot control or make changes.
5. During the remote assistance session, you and the customer can continue chatting.

LogMeIn Integration Quick Start

This article will help administrators enable and configure integration with LogMeIn Rescue for their contact center. After completing the following steps, agents who are also LogMeIn Rescue technicians will be able to support customers with remote assistance during call and chat interactions.

Procedure

1. Make sure that...
 1. You have access to a valid LogMeIn Remote Support On-Demand account and the Rescue Technician Console application.
 2. You know the credentials that the master administrator of LogMeIn Rescue uses to log in to the Rescue Technician Console application.
 3. The master administrator of LogMeIn Rescue is **not** also a technician.
2. Confirm with your service provider that the LogMeIn Rescue Integration feature is enabled for your contact center.
3. In the Contact Center Administrator application, add a Remote Assistance integration account of type LogMeIn. See the *Contact Center Administrator Guide*, section *Integration Accounts* > [Remote Assistance](#).
4. In Agent Desktop, an agent can [accept a voice call and start a remote assistance session](#). The agent must be a LogMeIn Rescue technician, have the LogMeIn Rescue Technician Console application installed on their computer, and be logged in to that application.
5. In Agent Desktop, an agent can [accept a chat and start a remote assistance session](#). The agent must be a LogMeIn Rescue technician, have the LogMeIn Rescue Technician Console application installed on their computer, and be logged in to that application.

Learn More

- [Overview: Remote Assistance in Chats](#)
- [How to Start Remote Assistance During a Chat/SMS/Messaging Session](#)

- [How to Transfer a Remote Assistance Session to a Different Agent During a Chat Session](#)
- [Overview: Using Remote Assistance During Calls](#)
- [How to Start Remote Assistance During a Phone Call](#)
- [How to Transfer a Call with an Active Remote Assistance Session](#)

Known Issues and Workarounds

This page provides information about known issues for Bright Pattern Contact Center software.

Reports do not display properly in Firefox 67

Due to a JavaScript root name conflict between Google Web Toolkit (GWT) and Firefox, [reports are not displaying in Firefox 67](#)—running a report brings up a blank browser tab.

As a workaround to this issue, we recommend doing the following:

1. In Firefox, navigate to **about:config** to bring up preferences.
2. Search for preference **security.webauth.u2f**
3. Set the value to false by double-clicking on the preference.

Embedded Agent Desktop Widget in Safari

If you make the recommended changes to the *websersers.cfg* file as noted in [Configuration for Security Best Practices](#) (i.e., to address cookie handling in Chrome 80), the Embedded Agent Desktop widget (i.e., iframe) will not work in the Safari web browser. This issue affects **only** customers who use integrated Bright Pattern Contact Center software in third-party applications (e.g., Salesforce, Zendesk, etc.). Currently, Apple is working on a fix for this issue. Our recommended workaround is to use a web browser other than Safari. Note that users may still access the regular Agent Desktop application on Safari.

Externally Linked Images in Jaspersoft Reports

Bright Pattern tightened the security addressing a recently discovered Jaspersoft reports vulnerability in version 5.5.5. As a result Jaspersoft reports cannot use links to external URLs (e.g., links to custom logos). Bright Pattern suggests using embedded images in reports, if a custom logo is absolutely necessary.

MongoDB Performance

As noted in Bright Pattern Contact Center version 5.5.5, depending on a tenant's UI usage pattern, MongoDB queries to the activities collection can degrade. To avoid such degradation we recommend adding the following index:

```
db.activities.createIndex({tenant_id:1, global_interaction_id:1}, {background:true});
```

Workaround for Integration With Multiple Salesforce Accounts

If your contact center requires multiple Salesforce integration accounts to be configured, it is likely that you will encounter issues when requesting access tokens for any integration account other than the initial one.

That is, if you have successfully configured one integration account, while completing *step 2* of the *Add Salesforce Integration Account in Bright Pattern* procedure for a subsequent account, when you reach the point where you click **Request token**, the login window that pops may appear with the URL of the initial Salesforce integration account.

Should you experience this issue, take the following steps:

1. After configuring the initial account, clear all cookies from your web browser. Note that this action will log you out of the Contact Center Administrator application.
2. Log back into the application and complete *step 1* and *step 2* of the procedure.
3. When you reach the point in *step 2* when you click the **Request token** button, a window will pop. Ensure that the URL in this window matches the *Url* configured in the basic properties for the subsequent account.

Note that this workaround applies to all versions of Salesforce (i.e., [Classic](#), [Lightning](#), and Service Cloud).

Windows Administrative Remote Assist Task Manager

Due to Windows Security features, agents may lose mouse and keyboard control over their [Remote Assist sessions](#), but this will only occur when ALL of the following are true:

- Customer is using Windows, AND
- Customer is logged in as an admin, AND
- The Task Manager is opened on the customer's computer, AND
- The Task Manager window has a focus, AND
- The Remote Assist session is not elevated

No matter how the Task Manager is opened, this specific combination of events may cause the agent to lose keyboard and mouse control.

To work around this issue:

- Elevate the session, OR
- Ask your customer to close the Task Manager while speaking with them via phone or chat

