



Version 5.3.19

Bright Pattern Documentation

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Installing and Updating the Agent Desktop Helper Application

The Agent Desktop Helper Application is a software component that provides many functions for the Agent Desktop application, such as a softphone, screen-pop, logging, indication of audio device changes, alerts on all audio devices, screen recording and monitoring, and voice quality monitoring.

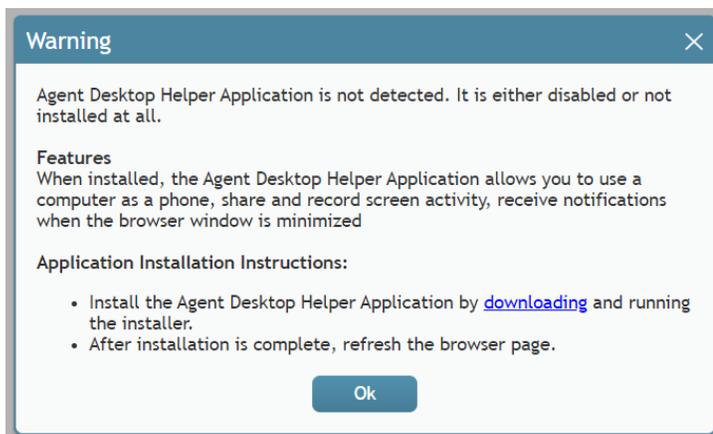
From time to time, you may be prompted by Agent Desktop to install the Agent Desktop Helper Application on your computer or enable it in your web browser. This article will guide you through the process of downloading, installing, and enabling the application on any browser.

When Do You Need the Agent Desktop Helper App?

You may be prompted by a warning message to download and install the Agent Desktop Helper application when...

- You log in to Agent Desktop for the first time.
- The Agent Desktop Helper app is not yet installed on your computer.
- Agent Desktop has been updated, requiring a higher version of the Agent Desktop Helper app.
- The app is being blocked by your web browser.
- The browser extension is not enabled.
- An error message indicates that the SIP phone has lost connection to the system.
- An error message indicates that you logged in with a softphone, but the Agent Desktop Helper app is not installed or is blocked by your computer.

A warning message such as the one shown contains instructions for installing and enabling the Agent Desktop Helper Application component on your computer. The exact text of the message and your actions will depend on the browser you are using.



Agent Desktop update message

How to Enable the Application for Various Browsers

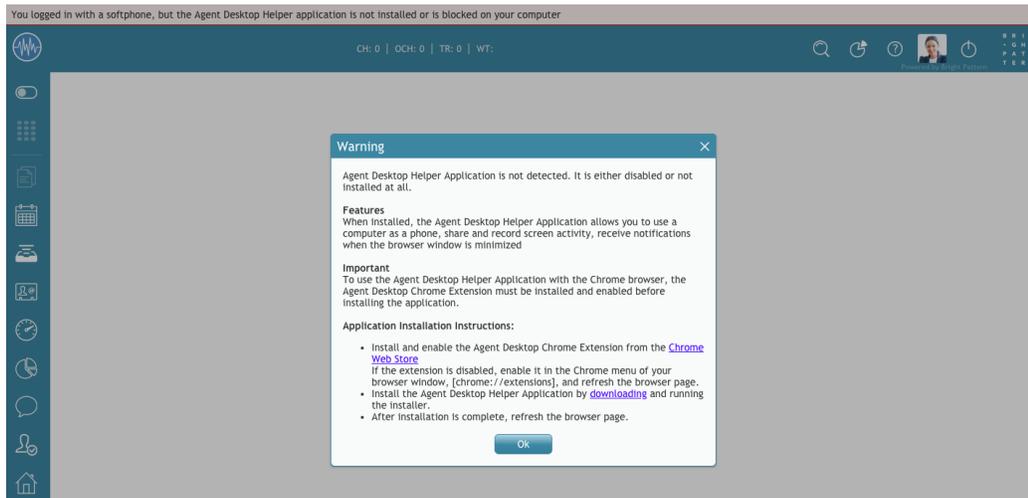
The Agent Desktop Helper Application is supported on Google Chrome, Mozilla Firefox, Safari, and Microsoft Internet Explorer. Some browser extensions or other settings may need to be enabled, depending on your browser.

Chrome

The Agent Desktop Helper Application is enabled for Chrome using an extension called **Agent Desktop Chrome Extension**.

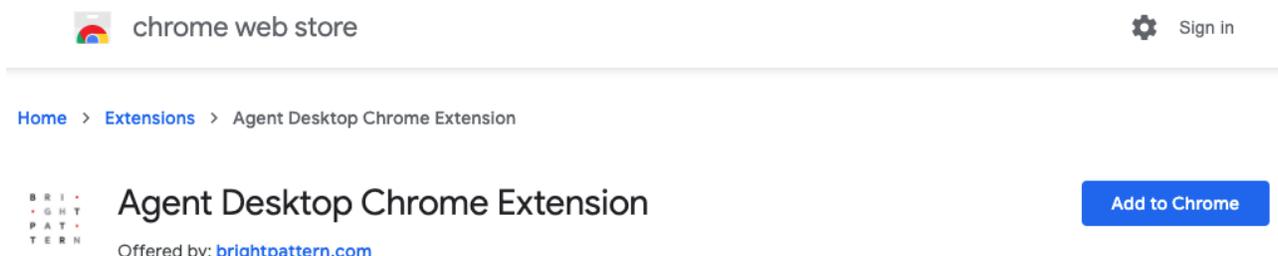
How to Enable the Extension for Chrome

1. When prompted by the warning message, follow the instructions to download and install the Agent Desktop Helper Application (Mac: *bpclient_mac.pkg*, Windows: *BPClientSetup.exe*).



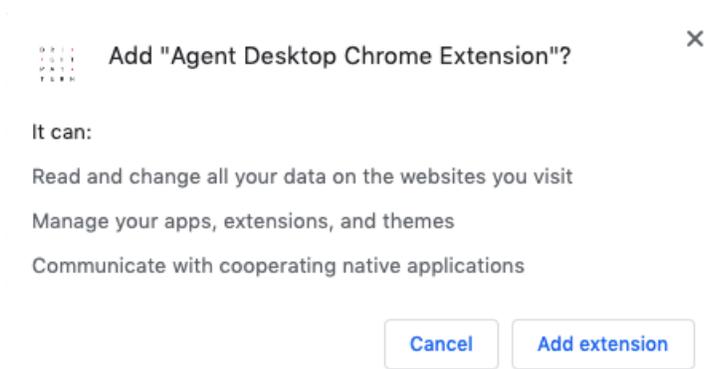
Agent Desktop update message

2. After installation is complete, go to the [Chrome Web Store](#) and click **Add to Chrome** to get the Agent Desktop Chrome Extension.



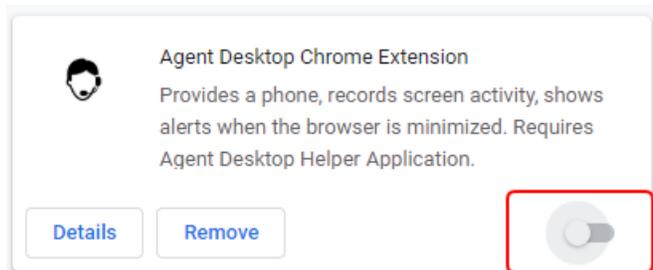
Chrome Extensions > Agent Desktop Chrome Extension

3. Then click **Add extension**.



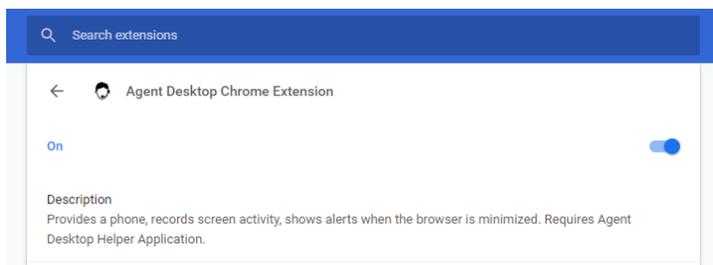
Confirm that you want to add the extension

4. Go to *Settings > Extensions* (or type "chrome://extensions/" in your browser's address bar), find the Agent Desktop Chrome Extension, and set the slider to **On**. Doing so will enable the extension for Chrome. When the slider is gray, the extension is not enabled. When the slider is blue, it is enabled.



Chrome Settings > Extensions > Agent Desktop Chrome Extension

5. Alternatively, you may enable the extension by clicking **Details** and setting the slider to **On**. The other settings in *Details* are optional.



Agent Desktop Chrome Extension details

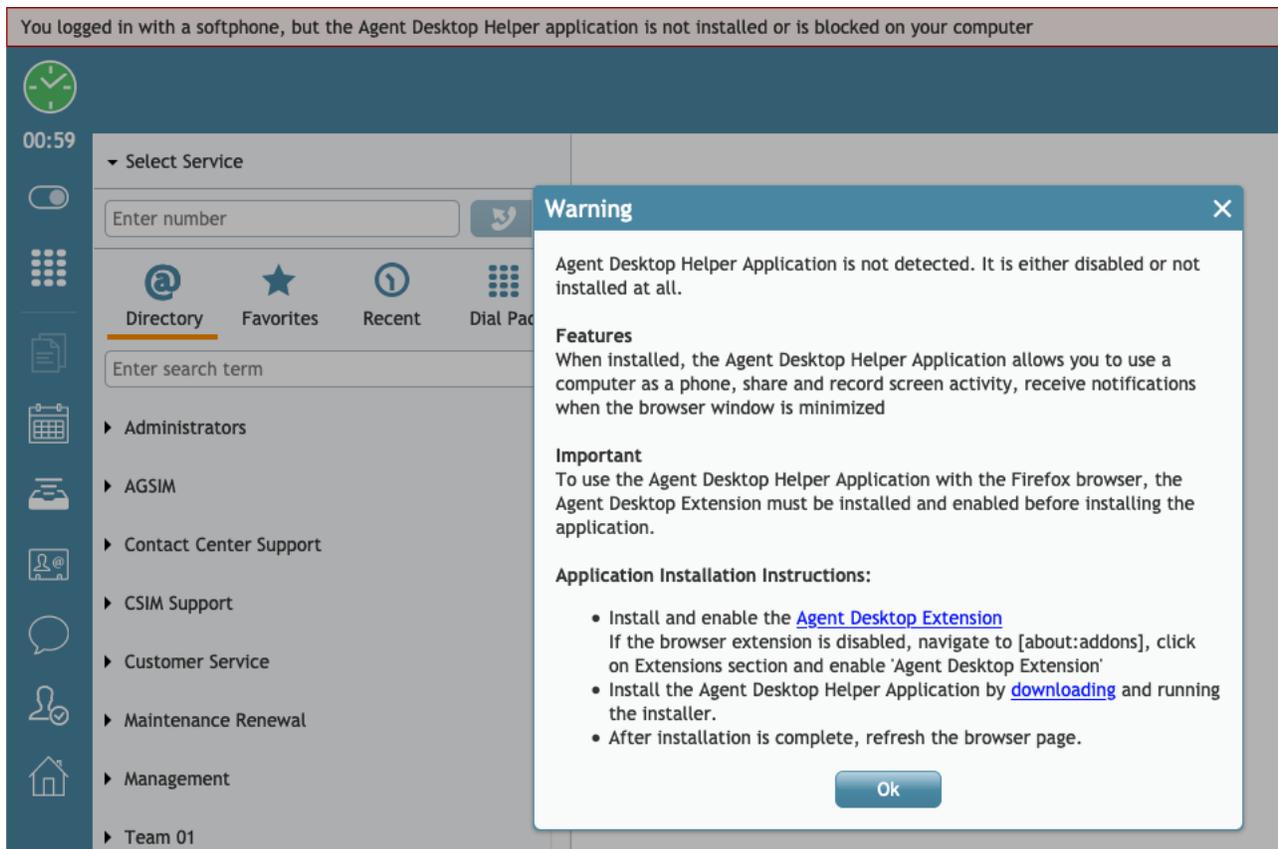
6. Go back to the Agent Desktop application and refresh the page. You can now begin using it.

Firefox

The Agent Desktop Helper Application is enabled for Firefox version 53 and later through the use of an extension called **Agent Desktop Extension**.

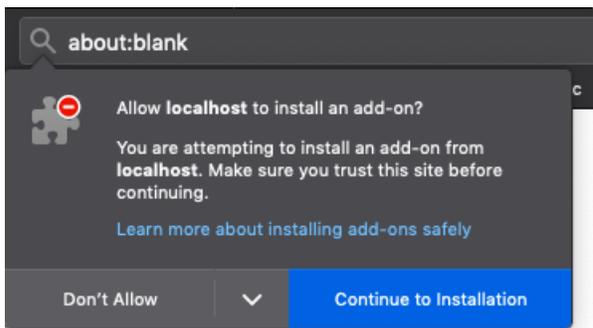
How to Enable the Extension for Firefox

1. In Agent Desktop, you will be prompted by a warning message.



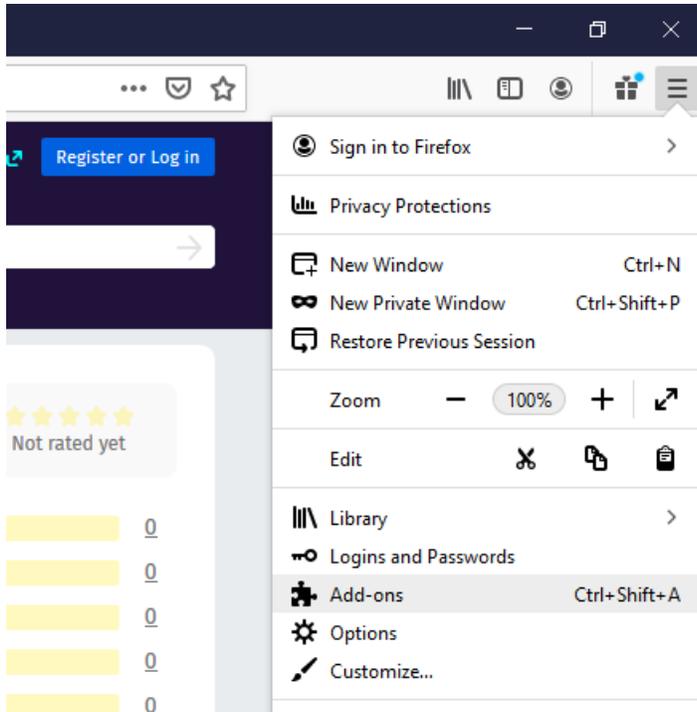
Example of an Agent Desktop warning message

2. Follow the instructions in the message to download the Agent Desktop Helper Application (Mac: *bpclient_mac.pkg*, Windows: *BPClientSetup.exe*) and install and enable the Agent Desktop Extension:
 1. Click the **downloading** link to download the application.
 2. Run the installer, and follow all the instructions given on your screen.
 3. Click the **Agent Desktop Extension** link in the warning message to install the Agent Desktop Extension. Doing so will bring up a Firefox dialog such as the one shown, asking you to allow the Agent Desktop Extension to be installed as an add-on. Click **Continue to Installation**.



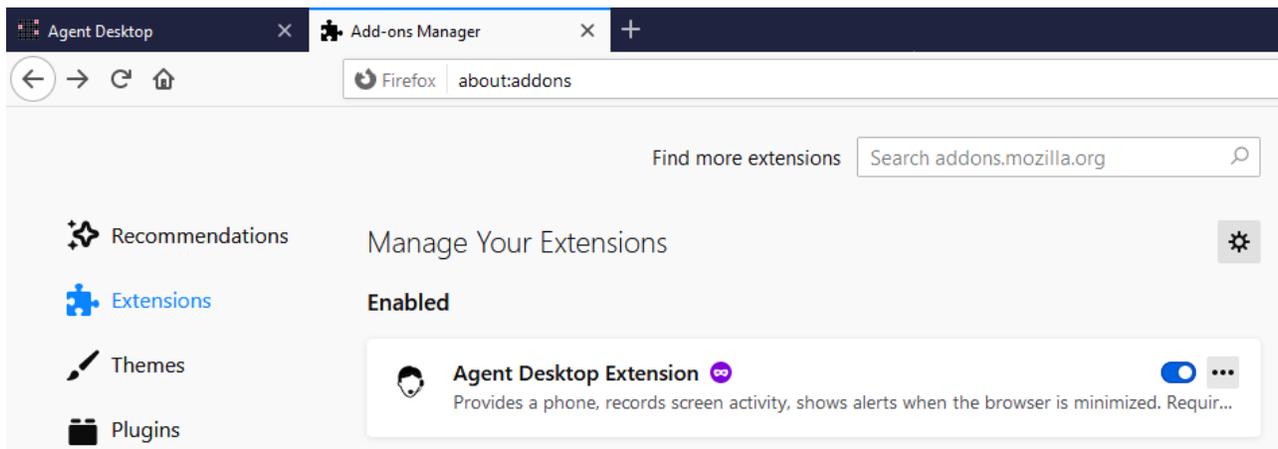
Example dialog for Firefox add-on installation

3. Make sure that the extension is enabled in Firefox Add-ons. Go to *Firefox Menu > Add-ons* (or type **about:addons** in the address bar of the browser to access the extension).



Firefox > Menu > Add-ons

4. The Agent Desktop Extension should be shown as **Enabled**, and the slider should be switched to **On**. When the slider is grey, the extension is not enabled. When the slider is blue, it is enabled.



Agent Desktop Firefox Extension in about:addons

5. If you click on Agent Desktop Extension, you can view and change the other settings for the extension. Those settings are optional.
6. You can now return to the Agent Desktop application. Refresh the page to begin using it.

Internet Explorer

Internet Explorer does not require an extension, but if you use Internet Explorer 11 or higher, the browser's Enhanced Protected Mode must be disabled in order for all Agent Desktop application logs to appear in the same folder (e.g., "C:\Users*<UserName>*\AppData\Local\Temp\logs").

The logs provide information about what has happened in the application while you were logged in. Having logs is important because you may need to provide them to your supervisor or administrator if ever you need troubleshooting assistance.

How to Disable Enhanced Protected Mode

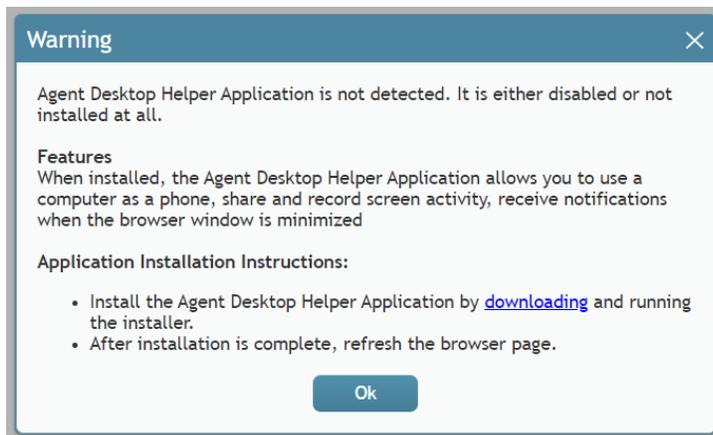
1. In the browser application, click **Tools** (Alt+X) and select **Internet options**.
2. Click the **Security** tab, and deselect the **Enable Enhanced Protected Mode** checkbox.
3. Click **OK**.

Safari

The Agent Desktop Helper Application is enabled for Safari 10, 11, and 12 on Mac OS X 10.12 (Sierra) and higher through the use of an extension, which is packaged in the Agent Desktop Helper Application installer (*bpclient_mac.pkg*). The installer will detect the OS X version your system is running on and will install the extension only if needed.

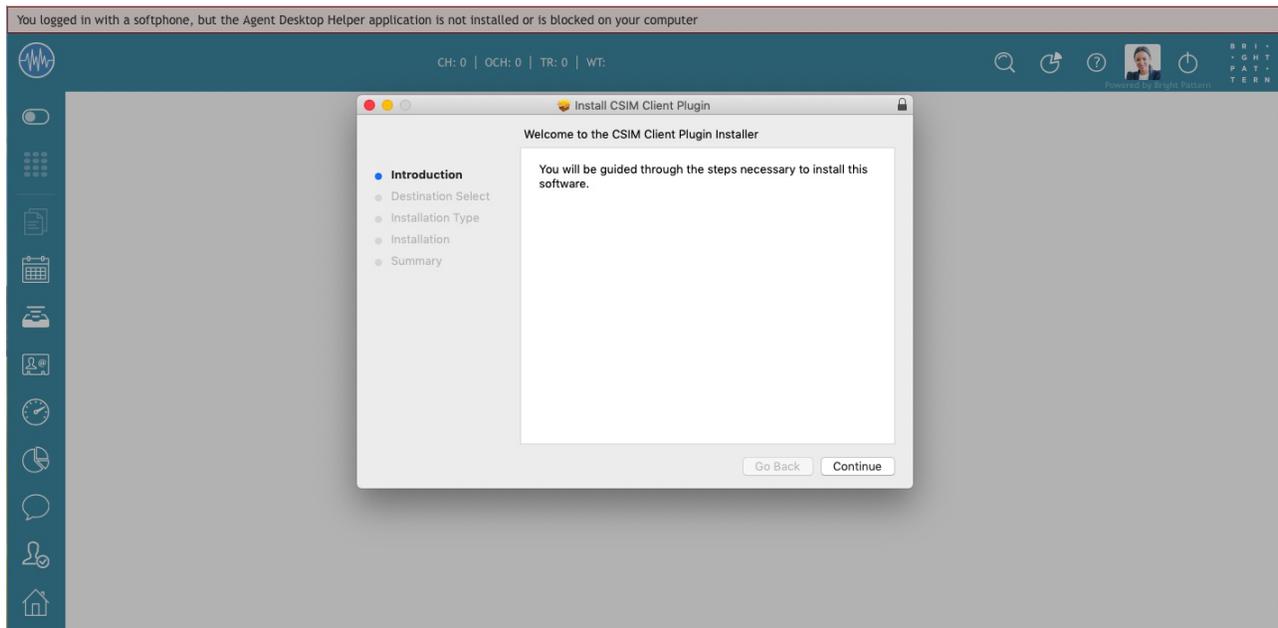
How to Enable the Application for Safari

1. When prompted by the warning message, follow the instructions to download the Agent Desktop Helper Application (*bpclient_mac.pkg*).



Agent Desktop update message

2. Follow the prompts to install "CSIM Client Plugin."



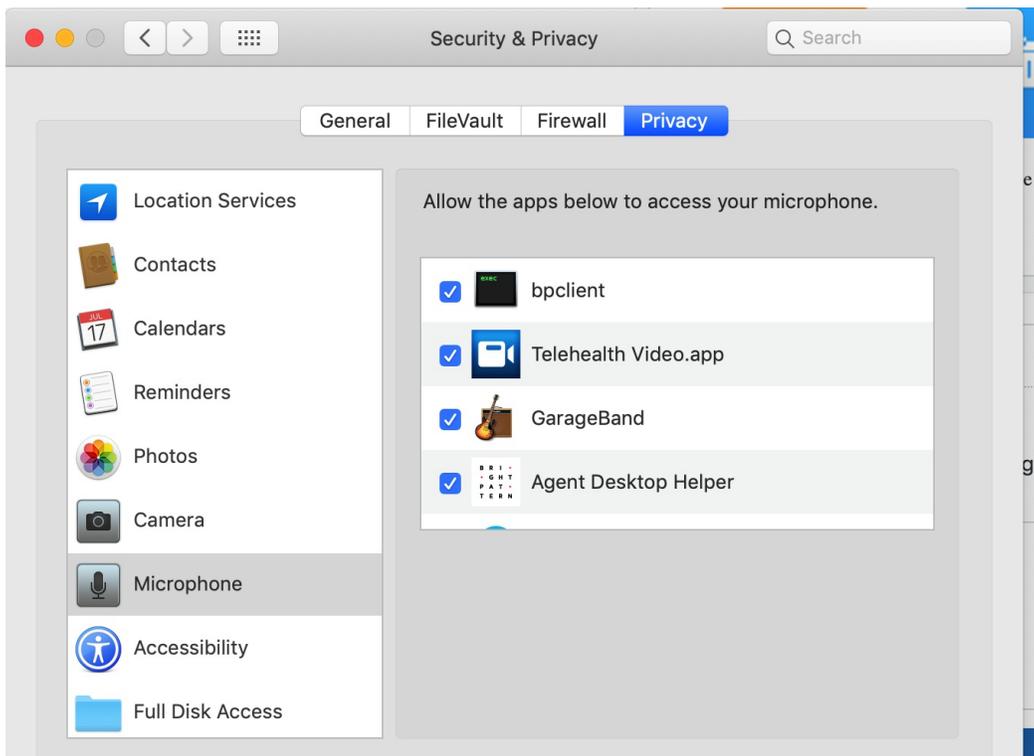
Install CSIM Client Plugin

3. After installation is complete, refresh the Agent Desktop webpage. You can now begin using it.

Mac Security/Privacy Settings

If you are on a Mac, note that you may have to update your security/privacy settings, in addition to all the aforementioned steps for installing/updating the Agent Desktop Helper Application on various browsers.

In your privacy settings, allow both "Agent Desktop Helper" and "bpclient" apps to use the microphone. This step is required, no matter which web browser you are running.



Example of allowing apps to use the microphone in Security & Privacy > Privacy

Other Updates

From time to time, the Agent Desktop Helper Application may have to be updated to support new system functionality. When a new version of this component becomes available, you may see a warning message similar to the one described above prompting you to upgrade. Follow the instructions of the message to update and enable the Agent Desktop Helper Application component on your computer.

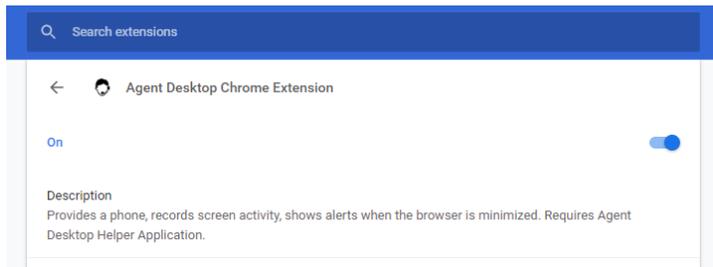
Troubleshooting

This section describes some common issues you might experience and what you should do.

I just installed the Agent Desktop Helper Application but I still get the warning message in Agent Desktop.

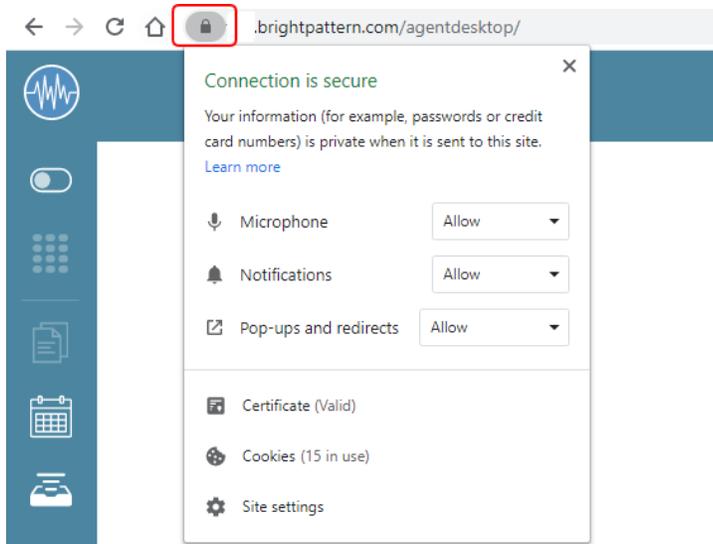
What this might mean:

- The installation may be incomplete. Check that the application is installed on your computer.
- You may need to refresh the page again. If the warning message still appears after that, then close your browser, reopen it, and go back to Agent Desktop.
- If your browser requires an extension, it may be disabled. Go to the extension settings and make sure the extension is **enabled** or set to **On**.



Agent Desktop Chrome Extension details

- Your browser may be blocking the application, the page, or pop-ups on the page. Try clicking the lock icon in the address bar, and make sure that all options are set to **Allow**.



Click the lock

A message says a network issue is disrupting your phone device.

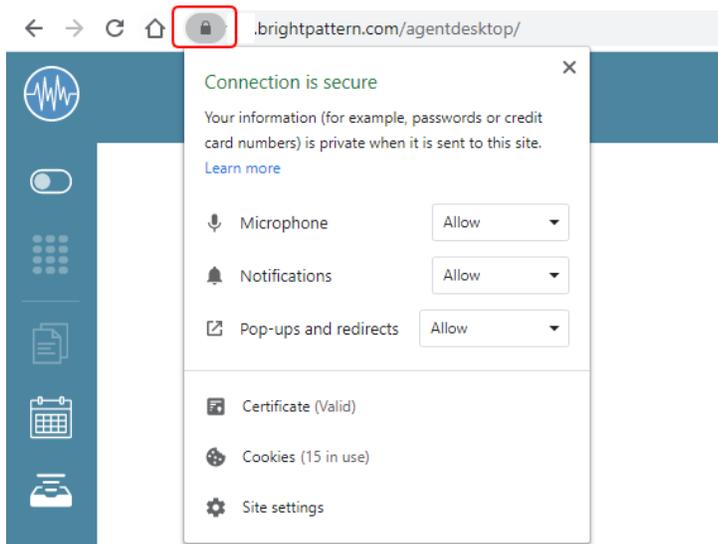
What this might mean:

- Restarting Agent Desktop may be required. Log out of Agent Desktop, and log in again.
- You may have lost Internet connectivity. Check your Internet connection and refresh the page.
- If you made changes to the [phone device](#), you need to log out of Agent Desktop and log in again for those changes to take effect.

A message says I logged in with a softphone, but the Agent Desktop Helper app is not installed or is blocked by your computer.

What this might mean:

- If your browser requires an extension, it may be disabled. Go to the extension settings and make sure the extension is **enabled** or set to **On**.
- Your browser may be blocking the application, the page, or pop-ups on the page. Try clicking the lock icon in the address bar, and make sure that all options are set to **Allow**.



Click the lock

- Anti-virus software running on your computer might be blocking the application. Typically, in this case, you will see a warning message asking you either to cancel or confirm the download/install. Choose the confirm/allow/proceed option to proceed with the installation/upgrade.

None of this helps me.

Contact your supervisor and/or service provider to request assistance.

Chat Widget Styling

In the Chat Widget Configuration application, you can edit the style of your chat widget to suit your organization's brand, website style, logo, and so forth.

Chat Widget Configuration

Preview URL:

Chat Widget Styling

Highlight color:

Highlight text color:

Title:

Show agent pic:

Window width: px

Window height: px

Style:

Channel hopping: allow

File upload: allow

Web notifications: allow

VoIP call: allow

Visitor video: allow

Enable cobrowsing: allow

Remote editing: allow

Emoji selector: allow

Sound to play when agent joins, URL:

Inactivity warning message text:

Inactivity timeout message text:

Agent joined message text:

Agent left message text:

Session ended text:

End session dialog text:

Required field text:

Preview pane:

CupIQ Chat

Please wait while we're looking for an available representative... 00:00

Representative found. Connecting... 00:00

ⓘ \$(name) joined chat session

00:00 **User message**

ⓘ Agent message 00:00

ⓘ Are you still here? We have not heard from you for a while.

ⓘ Session is closed due to inactivity

ⓘ \$(name) left chat session

ⓘ Chat session ended

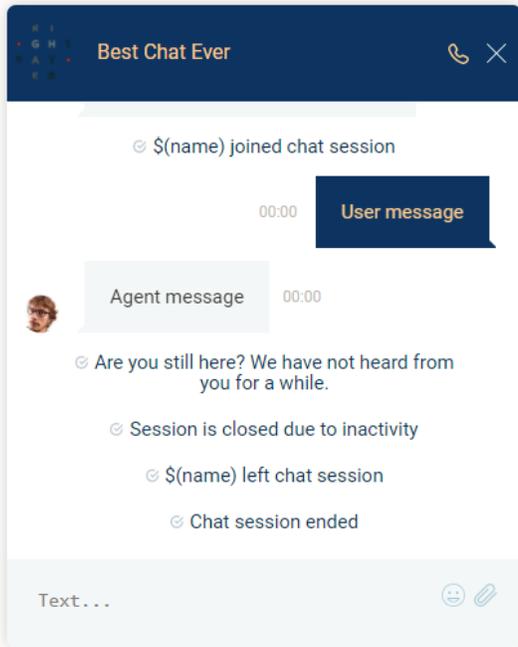
Text...

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Chat Widget Configuration > Chat Widget Styling

Properties

The following properties determine the overall appearance of the chat widget. As you edit style properties, the preview pane on the right side of the screen will display the changes you are making to the widget.



Example of a customized chat widget

Highlight color

Highlight color is the color shown at the top of the widget, as the text color of the system's automatically sent messages (e.g., "Chat session ended"), and as the background color of the customer's text. You can select this color from the given list of 40 web colors.

Highlight text color

Highlight text color is the color of the customer's text. You can select from the given list of 40 web colors to help differentiate the customer's text from the agent's.

Title

Title is the name of your chat widget. Having a title is helpful when you have multiple chat widget configurations and need to identify them quickly.

Show agent pic

Select the *Show agent pic* checkbox if you wish the agent's user profile photo to be shown during a chat interaction. Select from the following options:

- none
- show
- always show default

Window width

The *window width* can be specified in pixels.

Window height

The *window height* can be specified in pixels.

Style

There are two display styles from which to choose: **style1** and **style2**. Style1 places a border around the entire widget, and style2 has no border.

Channel hopping

To enable customers to move the conversation from rich web chat to another media channel (i.e., SMS, Facebook Messenger, LINE, Telegram, Viber), select the **allow** checkbox. Note that channel hopping can be enabled only if the other channel types are supported and configured for your contact center.

File upload

To allow customers to upload photos, documents, or other such files to a chat interaction, select the **allow** checkbox.

Web notifications

Select **allow** for web notifications to appear for new chat messages.

VoIP call

Select **allow** to enable the customer and agent to talk on a [VoIP call](#) while chatting. Notice that when you select **allow**, the headset icon appears on the chat widget. Either customers or agents can click the headset icon to initiate the VoIP call. The call can be disconnected by clicking the phone button.

Visitor video

Select **allow** to enable the customer and agent to talk on a video call while chatting. Notice that when you select **allow**, the video camera icon appears on the chat widget. Either customers or agents can click the video camera icon to initiate the video call. The video can be disconnected by clicking the phone button.

Enable co-browsing

Select *allow* to enable the customer to share their screen with the agent and follow the customer's scrolling movements. Co-browsing is initiated during the chat by the customer--not the agent--and screen sharing ends when either the customer clicks Co-browsing  button or when the chat is terminated.

Notes:

- Starting from version 5.3.19, this option has been moved to the [Scenario Entry configuration page](#) and removed from Chat Widget Styling. Note that you will need to enable the new setting, [Enable co-browsing](#), for co-browsing to work.
- For customers who configured chat per the [full chat code](#) on older versions of Bright Pattern Contact Center and are upgrading to any versions between 5.3.5 and 5.3.18: If the *togetherJS_enabled* variable was used to enable co-browsing, after you upgrade this option will have priority over the variable **after** any changes are made and saved in Chat Widget Styling. If you wish to configure co-browsing, we recommend enabling this setting in Chat Widget Styling.

Widget minimization

This setting allows the customer to minimize and restore the chat widget at any time. When minimized, customers will see a message alert (i.e., a red badge) on the chat widget tab if new chat messages are sent from the agent; the number in the badge represents the number of messages the agent has sent since the widget was minimized. Note that this setting is enabled by default.

Remote editing

When enabled, *remote editing* allows agents to enter or update data via the customer's screen. Note that this option is available only if the setting [Enable cobrowsing](#) is enabled, and if so, this setting is enabled by default.

Emoji selector

If the *emoji selector* option is enabled, agents and customers can click on the **emoji** icon, which pops the emoji selector tab; when selected, the emojis will appear in chat messages. Note that this option is enabled by default.

Sound to play when agent joins, URL

If a sound should be played when an agent joins the conversation, enter the URL of the sound here.

Inactivity warning message text

When a chat interaction has been idle for too long, the *inactivity warning message text* will appear on both the agent's and customer's screens. Enter the contents of the message in the text entry field (e.g., "Your chat session will expire due to inactivity.").

Inactivity timeout message text

Upon timeout, inactive chat interactions will pop the *inactivity timeout message text* on both the agent's and customer's screens. Enter the contents of the message in the text entry field (e.g., "Your chat session has expired due to inactivity.").

Agent joined message text

The "agent joined message text *is added to the chat interaction when an agent accepts it. Enter the message to appear in the chat interaction (e.g., "Agent \$(first.name) has joined the chat.").* You can use variables in the message.

Agent left message text

The "agent left message text *is added to the chat interaction when the agent has either left completed the interaction or transferred it to another agent. Enter the message to appear in the chat interaction (e.g., "Agent \$(first.name) has left the chat.").* You can use variables in the message.

Session ended text

The *session ended text* appears in the chat interaction when the chat has been terminated (e.g., "This chat session has ended. Have a great day!").

End session dialog text

The *end session dialog text* message appears when customers attempt to end the chat by closing the chat widget (e.g., "Do you want to end the chat session?").

Required Field text

The *Required Field text* field lets you configure the message that appears when [pre-chat form required fields](#) are not filled out (e.g., "Please fill").

Refers to Required Fields text

The *Refers to Required Fields text* field lets you configure the message that appears when referring to [required fields](#) (e.g., "* Refers to Required Fields").

Invalid Input Field text

The *Invalid Input Field text* field allows you to configure the text that appears when [invalid input](#) is entered in a field.

Notifications prompt

The *Notifications prompt* field lets you configure the text that appears at the top of the chat widget that prompts users to allow notifications from their web browsers.

Co-browsing dialog text

If [Surfly integration](#) is configured for your contact center, the *Co-browsing dialog text* field allows you to configure the text that appears in the [co-browsing dialog](#) that pops to customers, prompting them to accept the session.

Note: If you are creating a new [messaging/chat scenario entry](#), this text box will be prepopulated with the following: "By clicking Accept, an agent will join you on the page you are currently viewing. The agent can view and help you as you browse the web in this tab. The agent will not see login details, passwords, other browser tabs or programs you have opened. You can stop co-browsing at any time, by clicking X in the menu or by closing this tab in your browser."

If you are upgrading to Bright Pattern Contact Center version 5.3.19 with an existing messaging/chat scenario entry, note that this text box will be empty.

Chat Widget Styling

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Chat Widget Configuration

Preview URL:

Chat Widget Styling

Highlight color:

Highlight text color:

Title:

Show agent pic:

Window width: px

Window height: px

Style:

Channel hopping: allow

File upload: allow

Web notifications: allow

VoIP call: allow

Visitor video: allow

Enable cobrowsing: allow

Remote editing: allow

Emoji selector: allow

Sound to play when agent joins, URL:

Inactivity warning message text:

Inactivity timeout message text:

Agent joined message text:

Agent left message text:

Session ended text:

End session dialog text:

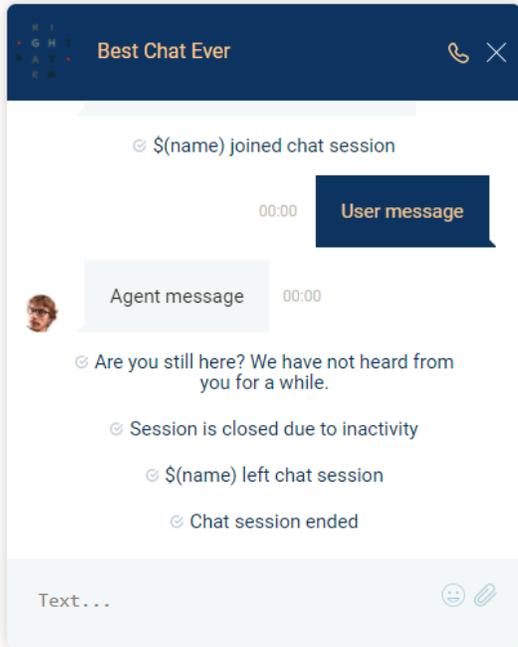
Required field text:

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Chat Widget Configuration > Chat Widget Styling

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Highlight text color is the color of the customer's text. You can select from the given list of 40 web colors to help differentiate the customer's text from the agent's.

Title

Title is the name of your chat widget. Having a title is helpful when you have multiple chat widget configurations and need to identify them quickly.

Show agent pic

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Window width

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There are two display styles from which to choose: **style1** and **style2**. Style1 places a border around the entire widget, and style2 has no border.

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Visitor video

Select **allow** to enable the customer and agent to talk on a video call while chatting. Notice that when you select **allow**, the video camera icon appears on the chat widget. Either customers or agents can click the video camera icon to initiate the video call. The video can be disconnected by clicking the phone button.

Enable co-browsing

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Notes:

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Widget minimization

This setting allows the customer to minimize and restore the chat widget at any time. When minimized, customers will see a message alert (i.e., a red badge) on the chat widget tab if new chat messages are sent from the agent; the number in the badge represents the number of messages the agent has sent since the widget was minimized. Note that this setting is enabled by default.

Remote editing

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Emoji selector

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Session ended text

The *session ended text* appears in the chat interaction when the chat has been terminated (e.g., "This chat session has ended. Have a great day!").

End session dialog text

The *end session dialog text* message appears when customers attempt to end the chat by closing the chat widget (e.g., "Do you want to end the chat session?").

Required Field text

The *Required Field text* field lets you configure the message that appears when [pre-chat form required fields](#) are not filled out (e.g., "Please fill").

Refers to Required Fields text

The *Refers to Required Fields text* field lets you configure the message that appears when referring to [required fields](#) (e.g., "* Refers to Required Fields").

Invalid Input Field text

The *Invalid Input Field text* field allows you to configure the text that appears when [invalid input](#) is entered in a field.

Notifications prompt

The *Notifications prompt* field lets you configure the text that appears at the top of the chat widget that prompts users to allow notifications from their web browsers.

Co-browsing dialog text

If [Surfly integration](#) is configured for your contact center, the *Co-browsing dialog text* field allows you to configure the text that appears in the [co-browsing dialog](#) that pops to customers, prompting them to accept the session.

Note: If you are creating a new [messaging/chat scenario entry](#), this text box will be prepopulated with the following: "By clicking Accept, an agent will join you on the page you are currently viewing. The agent can view and help you as you browse the web in this tab. The agent will not see login details, passwords, other browser tabs or programs you have opened. You can stop co-browsing at any time, by clicking X in the menu or by closing this tab in your browser."

If you are upgrading to Bright Pattern Contact Center version 5.3.19 with an existing messaging/chat scenario entry, note that this text box will be empty.

About

Bright Pattern Contact Center software integrates with Surfly, a co-browsing solution, in order to allow co-browsing between agents in the Agent Desktop application and customers viewing specific web resources. Co-browsing is an ideal solution for helping customers negotiate confusing web pages, fill out complex forms, and so forth.

The *Surfly Integration Guide* describes how to do the following:

- Configuring your Surfly account's settings to optimize Bright Pattern Contact Center integration
- Configuring a co-browsing integration account
- Adding the integration account to a messaging/chat scenario entry
- Training your agents how to operate co-browsing with customers

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](#)

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

Due to recommended system changes that 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 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.

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

