Version 5.3.2

Bright Pattern Documentation

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Table of Contents

Agent Grid

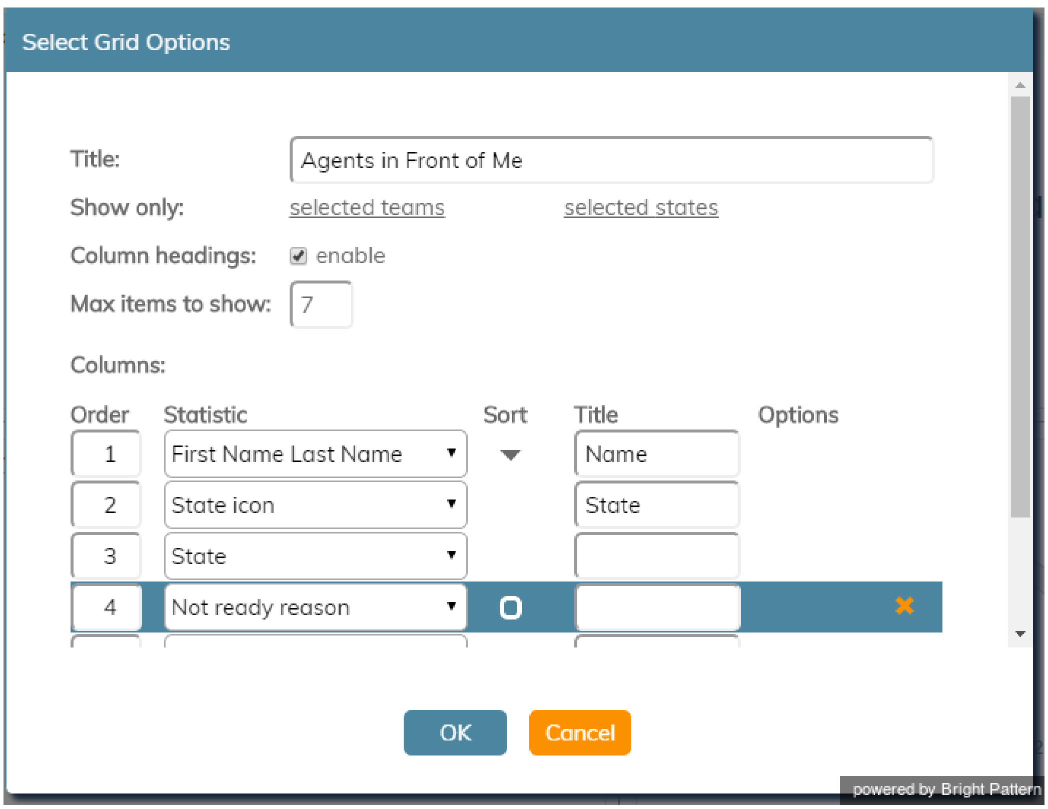
The Agent Grid widget provides information about a specified selection of agents on a team. Real-time metrics shown on this widget can help supervisors and agents understand team performance, view the status of other agents (e.g., *Ready* or *Not Ready*), and more.

The grid shows the following information about agents:

- Agent first and last name
- State
- The duration in state (except for *Ready*, where idle time is shown instead)

Settings

Users with the privilege *Customize Wallboards* may edit the control settings of wallboard widgets.



Settings for the Agent Grid widget

Title

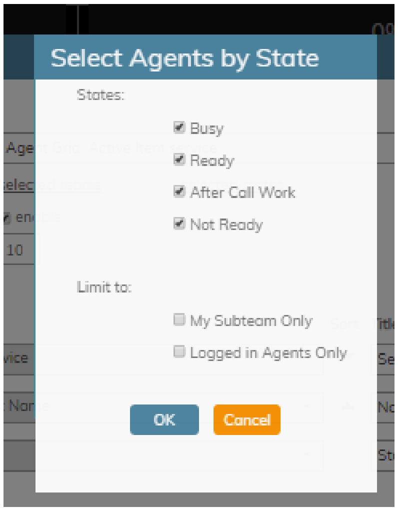
Title is the title of the widget. Widget titles, along with their icons, are displayed in the widget selector.

Show only

You can select the teams or states to be shown on the widget. Choose from *selected teams* or *selected states*.

If *selected states* is chosen, a dialog will open with the available states that can be selected. You may also limit the agents shown to only agents on your subteams or by logged-in agents.

Selected teams are chosen in the same way. Note that teams not assigned to the editing user will not be displayed or included in the calculation. The display is limited to the editing user's assigned teams.



Select Agents by State

Column headings

Selecting the **enable** checkbox enables the column headings to be shown on the widget.

Max items to show

Enter the maximum number of items to be shown on the widget.

Columns

Agent names and metrics are displayed in *Columns*. Note that *first+last* is a formula field.

Order

You can specify the *order* (i.e., 1, 2, 3) in which agents and their metrics are displayed in the widget. Note that you may sort the list of agents to show how many agents are ahead of you to accept an interaction.

Statistic

Statistic is the name of the statistic that will be shown on the widget.

Sort

Sort will sort the agents and agent statistics listed in the widget. Note that you may sort the list of agents to show how many agents are ahead of you to accept an interaction.

Column title

In the Columns section of the widget settings, the *Title* field allows you to rename the statistic's title.

Control Options

In the Settings dialog window shown, notice the control options. These are used to select, sort, delete, and move items in and out of the widget's columns.

- The "plus" icon is used to add more statistics to a column.
- The "X" is used to delete a statistic from a column.
- The sort circle means there is no sorting, and it appears only on hover.
- The sort up arrow is used to move a statistic up the list.
- The sort down arrow is used to move a statistic down the list.

Note the following:

- When column headings are disabled, the *Title* column is hidden.
- When multiple sort options are selected, they are evaluated in the order that columns are defined.

Agents Ahead of Me

The *Sort* settings of the Agent Grid widget can be modified so that agents can see if there are any other agents in front for them for receiving the next call. The Agent Grid widget will list the top 10 agents from all teams, which are sorted by status and metrics in the following order:

- Idle time, descending
- Wrap Up time, descending
- Not Ready time, descending
- Busy time descending

Logged-in agents who have this widget on their wallboards will see their names highlighted in the list. If there are no logged-in agents, the widget shows nothing and “No agents logged in."

In the example shown, the Agent Grid's title has been changed to "Agents in Front of Me" and the widget shows the agents' first and last name, state, and the duration in state or idle time (i.e., the time since login or the last interaction).

Ten agents from all teams are listed with their names, states, and duration in state

Statistics

For the Agent Grid widget, the following real-time statistics and user properties may be selected.

Active Item: Direction

Active Item: Direction indicates whether the service for the interaction the agent is currently handling is inbound or outbound.

Active Item: Flagged

Active Item: Flagged indicates if the interaction the agent is currently handling is flagged.

Active Item: Hold Duration

Active Item: Hold Duration displays the current amount of time a customer has spent on hold for the interaction the agent is currently handling.

Active Item: Media

Active Item: Media is the media type (e.g., voice, chat, email) of the interaction that the agent is currently handling.

Active Item: Monitor Mode

For supervisors, *Active Item: Monitor Mode* indicates what monitor mode they are in.

Active Item: Party Name

Active Item: Party Name is the name of the customer from the interaction the agent is currently handling.

Active Item: Sentiment

Active Item: Sentiment is the sentiment score of the interaction the agent is currently handling. The score indicates how negative or positive the current interaction is, based on sentiment analysis. A score value below -0.05 is considered negative and a value above 0.05 is considered positive. A value in between -0.05 and 0.05 is considered neutral.

Active Item: Service

Active Item: Service is the service of the interaction that the agent is currently handling.

Active Item: State

Active Item: State is the agent's state in the interaction that the agent is currently handling.

Active Item: Talk Duration

Active Item: Talk Duration is the time an agent has spent talking on the current call (i.e., the time from the moment the call was answered minus any hold time). For chat sessions, this metric represents current chat session duration during which this chat session was shown to the agent (i.e., was selected in Active Communication List). If the agent is handling several chat sessions concurrently, only one selected session at a time is counted.

Average Handle Time

Average Idle Time

Average Preview Duration

Break Time

Calendar Events

Calendar Events Overdue

Count of Selected Dispositions

Custom Survey Metric 1

Custom Survey Metric 2

Customer Satisfaction

Extension

Extension is the agent's extension number.

First Call Resolution

First Name Last Name

First Name Last Name is the agent's first name followed by the last name.

Inbound duration average

Inbound duration total

Inbound emails dispositioned without reply

Inbound emails handled

Inbound emails in personal queues now

Inbound emails offered

Inbound emails pulled by agent

Inbound emails replied

Inbound emails unanswered

Inbound handled

Inbound handled now

Inbound held

Inbound held, non-transferred

Inbound rejected or missed by agents

Inbound released by agents

Inbound transferred away

Inbound transfers received

Last Name First Name

Last Name First Name is the agent's last name followed by the first name.

Login duration

Login duration is the total amount of time an agent has been logged in to their current Agent Desktop session.

Net Promoter Score

Next Not Ready State

Next Not Ready State indicates what an agent's next *Not Ready* state will be. For more information about agent state, see How to Interpret Your Current State Information in the Agent Guide.

Next State

Next State indicates what an agent's next state will be, e.g. *Break*, *Lunch*, etc.

Not Ready Reason

This statistic presents the reason for an agent not being ready to handle interactions.

For more information on agent states and *Not Ready* reasons, see the Agent Guide, section How to Interpret Your Current State Information.

Number of interactions recategorized to a different service

Number of nonreplies started and discarded by agents

Occupancy

Outbound calls duration average

Outbound calls duration total

Outbound calls rejected or missed by agents

Outbound emails in personal queue

Outbound interactions handled by agents (email - send non-replies)

Preview duration now

Records previews

Records skips

Records skips %

Selected Dispositions Percentage

State

State is the name of the agent state, such as *Logged out*, *Not Ready*, *ACW*, *Ready*, and *Busy*.

State duration

State duration is the amount of time the agent has been in a current state.

State icon

This field is the icon associated with the agent state, such as the icons for *Logged out*, *Not Ready*, *ACW*, *Ready*, and *Busy*.

Success rate

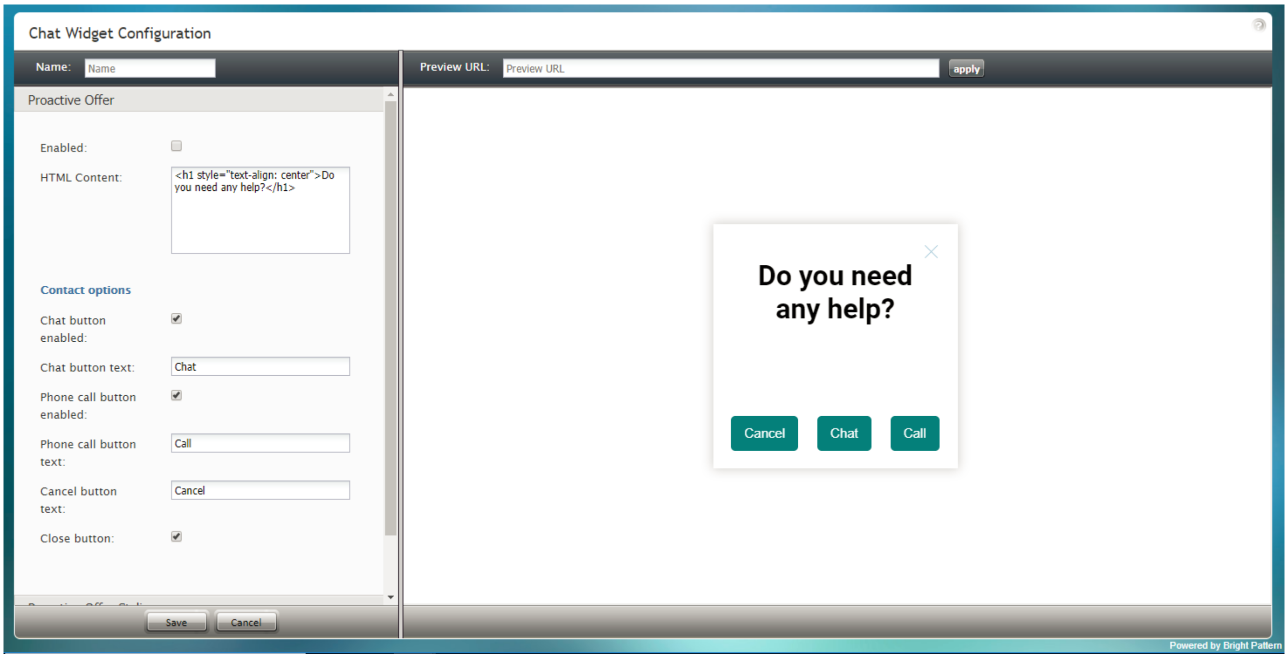
Team Name

Team Name is the name of the agent's team.

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

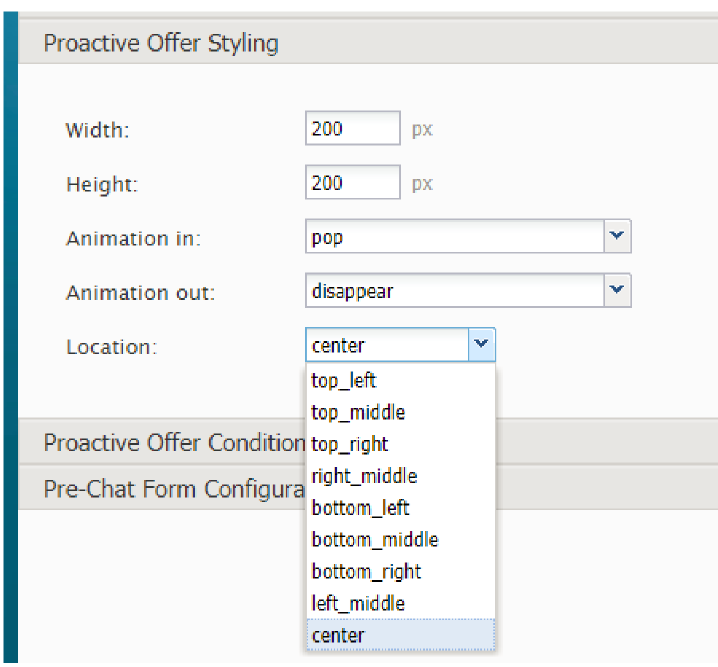
The *Cancel button text* may be customized as well. Enter the desired text or brief message in the text entry field. When the customer clicks the cancel button, the proactive offer chat will not be initiated.

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.



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

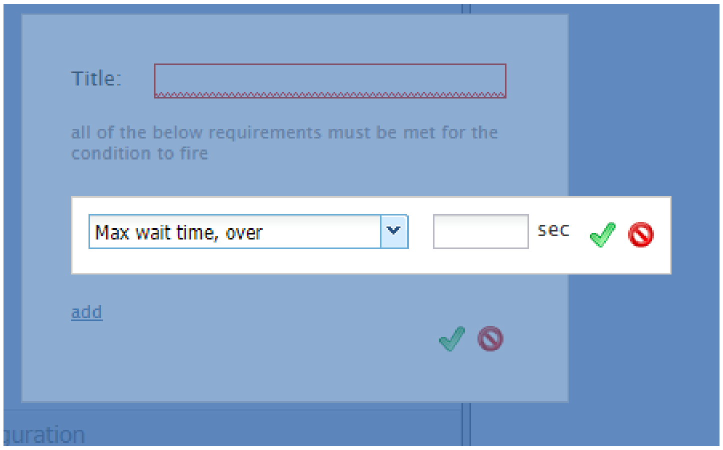
Location

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

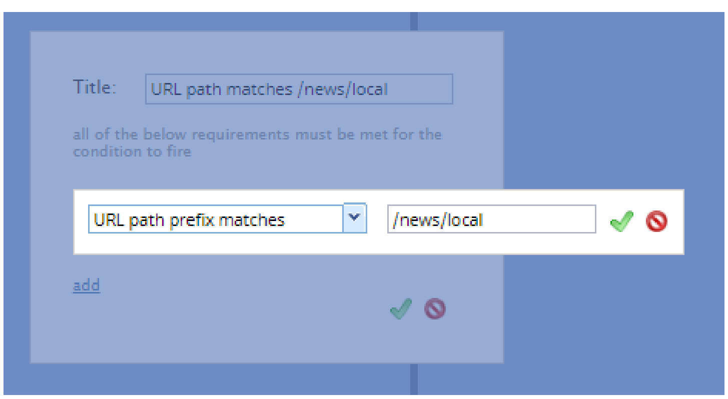
Max wait time, over

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.

Estimated wait time, below

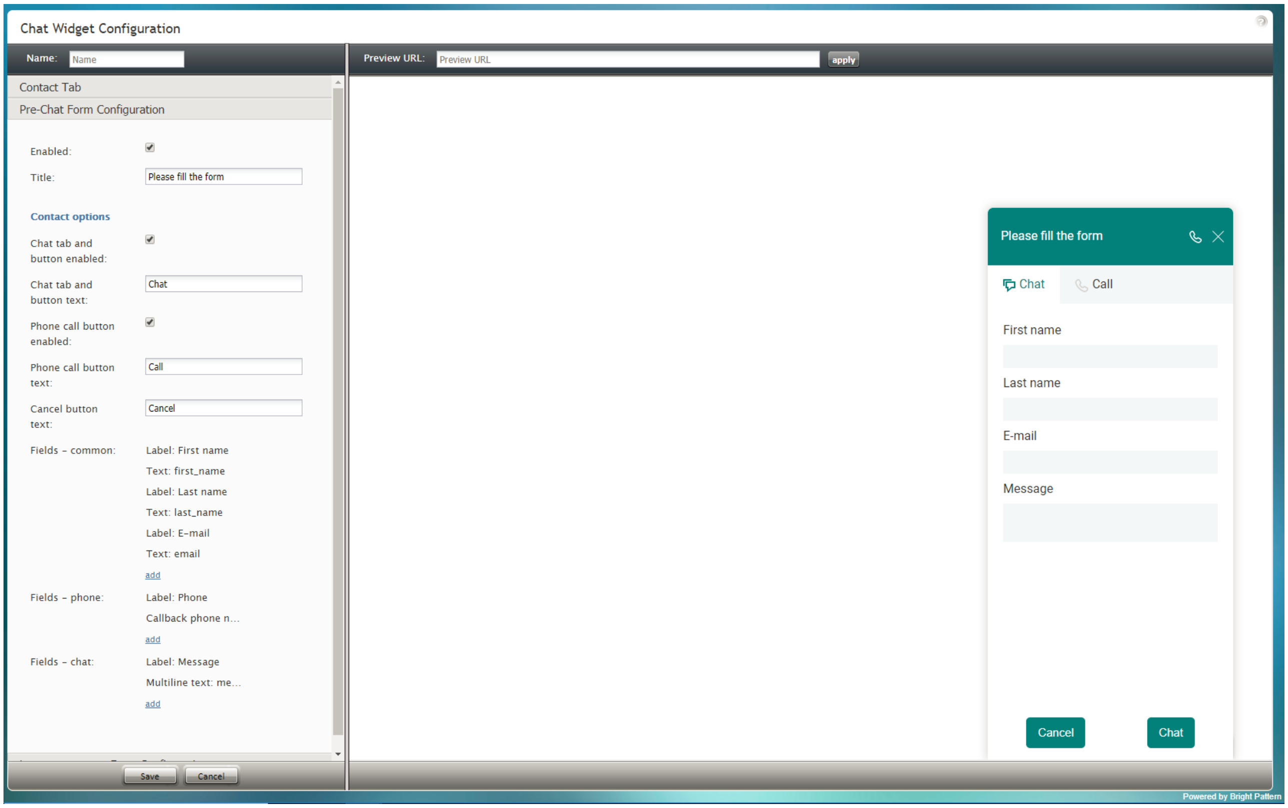
If there is an Estimated Wait Time (EWT) for customers to be connected to agents, the condition *Estimated wait time, below* allows administrators to show the proactive offer only when the expected time in the queue for customers would be less than the configured amount of time.

Non-mobile browser

When configured, *Non-mobile browser* allows proactive offers to be blocked on mobile devices.

Pre-Chat Form Configuration

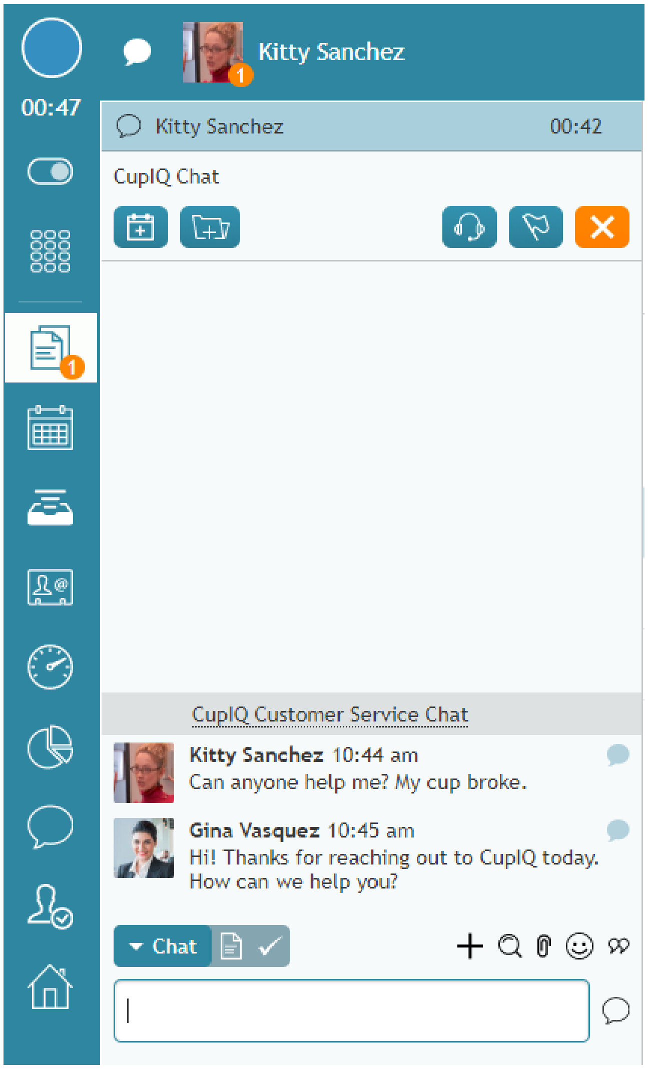
Learn about the properties for Pre-Chat Form Configuration.



Pre-Chat Form Configuration

Chat Controls

The controls available to you during an active chat session allow you to take a variety of actions including[taking notes], [search the Knowledge Base], and [add attachments]; the following is a list of buttons and controls you will see.



An active chat session

Schedule a Follow-Up Activity

The *Schedule a follow-up activity* button allows you to [schedule an event](#) in your calendar. Scheduling events lets you set reminders to follow-up with customers, agents, or activities at a later time.

Add a New Case

The *Add a new case* button allows you to create a new case related to an interaction. Creating cases for chat sessions creates a record of the interaction and can allow you to follow up with the customer through other channels (i.e., email, voice). For more information, see [How to Create New Cases](#).

Start VoIP Call

If enabled for your chat service, the *Start VoIP Call* button allows you to make a VoIP call to the customer. For more information, see How to Have an Audio Chat.

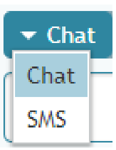
Flag the Chat

The *Flag the chat* button allows you to flag the chat; flagging a chat indicates to your supervisor that you need assistance with the interaction. For more information, see How to Flag a Chat Session.

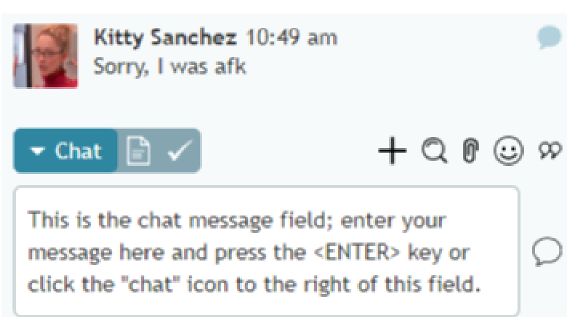
End Chat

The *End Chat* button ends the chat. Note that if you are conducting a conference and there is more than one agent and/or supervisor active in the chat session, selecting the End Chat button will end the chat for you only (i.e., the chat will stay active until the last user ends it).

Select Messenger Control



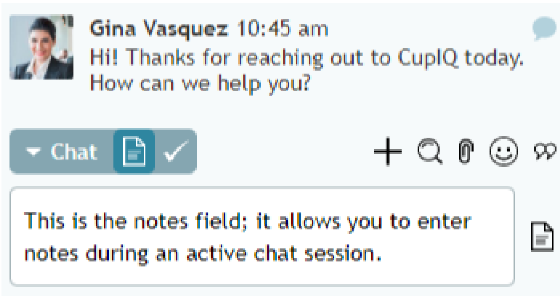
The messenger selection control allows you to select the messenger type (i.e., chat, SMS, MMS); the default messenger type will be that of the active interaction. Whether you have selected a specific messenger type or are using the default, you will be presented with a message field where you may enter a message to send to the customer. To send a message to the customer, type your message, then press the **<ENTER>** key or click the **send message**  icon.



The message field during an active chat

Select Notes Control

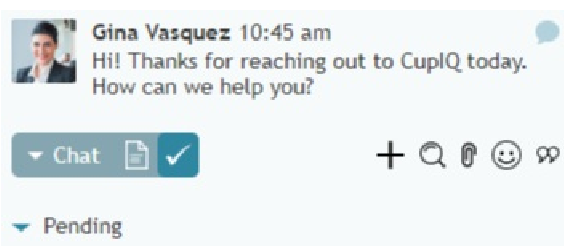
When selected, the notes control allows you to take notes during the chat session. The notes icon indicates to you this is a *notes* field and not a *message* field. For more information, see [How to Enter Dispositions and Notes].



You may take notes during your chat session

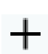
Select Disposition Control

If your contact center uses dispositions, when selected, the disposition control allows you to predisposition the interaction before the chat ends; note that the disposition may be changed after the chat has ended but before the interaction is [completed]. For more information, see [How to Enter Dispositions and Notes].



You may disposition a chat before it ends

Invite for Conference or Warm Transfer



When selected, the *Invite for conference or warm transfer* pops a directory and allows you to select another agent or supervisor to join (i.e., conference) the chat. Note that after another user joins the chat, you may select the [End Chat] button and leave; the chat will remain active for the other user.

Co-browsing or Start Remote Assistance

The presence of this button indicates that your contact center allows either remote assistance via integration with LogMeIn Rescue **or** co-browsing via integration with Surfly. **Note**: Ask your supervisor which feature is available to you.

Search the Knowledge Base

When selected, the *Search the Knowledge Base* icon pops the Knowlege Base panel, allowing you to browse through articles, look for keywords, and so forth. For more information, see How to Use a Knowledge Base Article.

Add an Attachment

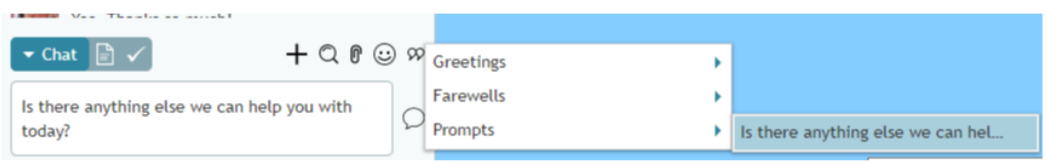
When selected, the *Add an attachment* icon pops a window and allows you to select a file from your computer to upload to the chat as an attachment. For more information, see How to Send and Receive Pictures and Documents.

Insert Emoji

When selected, the *Insert emoji* icon pops a selection of emojis; selected emojis are inserted into the message field.

Select Predefined Message

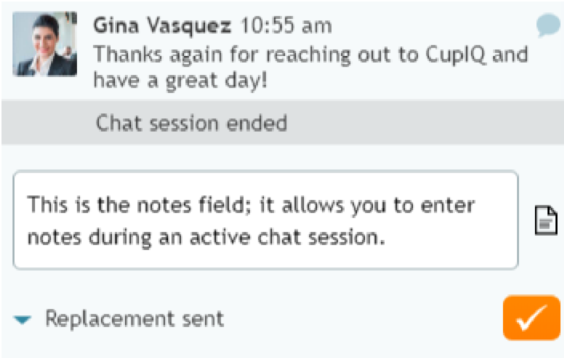
When selected, the *Select predefined message* icon pops a list of canned chat responses you have defined in Agent Desktop. Canned chat responses are used to populate the message field. For more information, see How to Create and Edit Canned Chat Responses.



Predefined messages, also known as canned chat responses

Complete

After your chat session is completed, you will have time to complete *After Call Work (ACW)*. ACW includes writing notes, dispositioning the chat, or finishing filling out any forms related to the service. For more information, see How to Wrap Up After Call Work.



The Complete button at the bottom of the chat