Version 5.3.5

Bright Pattern Documentation

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API Methods

InitAPI

InitAPI initializes the API.

This request initializes the TCP connection procedure. Once the connection is established, the evtApiUp event is sent to the .NET application.

Syntax

bool InitAPI();

ShutdownAPI

ShutdownAPI terminates the TCP connection between the API and the Agent Desktop.

Syntax

void ShutdownAPI();

CallDial

CallDial initiates a call to the number specified in *destination*.

Specification of the global interaction identifier (GIID) is optional. This returns request ID.

Syntax

UInt64 CallDial(string destination, string giid);

MuteCallRecording

MuteCallRecording mutes audio recording of the call identified by *callId* on the given desktop.

The recording will continue, but any voice signal will be replaced with silence.

Syntax

UInt64 MuteCallRecording(string callId);

UnmuteCallRecording

UnmuteCallRecording resumes previously muted audio recording for the call identified by *callId* on the given desktop.

Syntax

UInt64 UnmuteCallRecording(string callId);

MuteScreenRecordings

MuteScreenRecordings mutes screen recording on the given desktop.

For the period when screen recording is muted, the recording will contain a static snapshot of the desktop at the moment when mute was applied.

This request is processed by the Agent Desktop Helper Application.

Syntax

UInt64 MuteScreenRecordings();

UnmuteScreenRecordings

UnmuteScreenRecordings unmutes previously muted screen recording on the given desktop.

This request is processed by the Agent Desktop Helper Application.

Syntax

UInt64 UnmuteScreenRecordings();

CallSetScenarioVariable

CallSetScenarioVariable sets a variable identified by *name* for the scenario associated with the call identified by *callId* to the value specified in *value*.

Syntax

UInt64 CallSetScenarioVariable(string _callId, string _name, string _value);

CallSingleStepTransfer

This method initiates a single-step (blind) transfer of the call identified by *callId* to the number specified in *dest*.

Syntax

UInt64 CallSingleStepTransfer(string _callId, string _dest);

API Methods

InitAPI

InitAPI initializes the API.

This request initializes the TCP connection procedure. Once the connection is established, the evtApiUp event is sent to the .NET application.

Syntax

bool InitAPI();

ShutdownAPI

ShutdownAPI terminates the TCP connection between the API and the Agent Desktop.

Syntax

void ShutdownAPI();

CallDial

CallDial initiates a call to the number specified in *destination*.

Specification of the global interaction identifier (GIID) is optional. This returns request ID.

Syntax

UInt64 CallDial(string destination, string giid);

MuteCallRecording

MuteCallRecording mutes audio recording of the call identified by *callId* on the given desktop.

The recording will continue, but any voice signal will be replaced with silence.

Syntax

UInt64 MuteCallRecording(string callId);

UnmuteCallRecording

UnmuteCallRecording resumes previously muted audio recording for the call identified by *callId* on the given desktop.

Syntax

UInt64 UnmuteCallRecording(string callId);

MuteScreenRecordings

MuteScreenRecordings mutes screen recording on the given desktop.

For the period when screen recording is muted, the recording will contain a static snapshot of the desktop at the moment when mute was applied.

This request is processed by the Agent Desktop Helper Application.

Syntax

UInt64 MuteScreenRecordings();

UnmuteScreenRecordings

UnmuteScreenRecordings unmutes previously muted screen recording on the given desktop.

This request is processed by the Agent Desktop Helper Application.

Syntax

UInt64 UnmuteScreenRecordings();

CallSetScenarioVariable

CallSetScenarioVariable sets a variable identified by *name* for the scenario associated with the call identified by *callId* to the value specified in *value*.

Syntax

UInt64 CallSetScenarioVariable(string _callId, string _name, string _value);

CallSingleStepTransfer

This method initiates a single-step (blind) transfer of the call identified by *callId* to the number specified in *dest*.

Syntax

UInt64 CallSingleStepTransfer(string _callId, string _dest);

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Encryption Settings

Recordings and transcripts of all your contact center interactions can be encrypted while they are stored in the Bright Pattern Contact Center system.

Before you can use the encryption capability, it must be enabled for your contact center at the service provider level.

To enable encryption, go to *Security* > *Encryption Settings* and check the items that you intend to store encrypted.

Select from the following:

- Encrypt chat transcripts
- Encrypt SMS transcripts
- Encrypt stored email messages and attachments
- Encrypt screen recordings
- Encrypt voice recordings and transcripts

Security > Encryption

When you export any encrypted items out of the system, they will be unencrypted for export.

For more information about the method and keys used for encryption, see section Encryption Key Management.

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 > 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.

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Notes:

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- 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.

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End session dialog text

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Required Field text

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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").

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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 > Chat Widget Styling

Properties

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Example of a customized chat widget

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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.").

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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?").

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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.

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

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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

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

Users

A user is anyone who may need access to any functionality of Bright Pattern Contact Center. Each user in the Bright Pattern Contact Center configuration must be assigned to a team. The level of users' access to the system's functions is defined by their assigned roles. Thus, you should typically have both the roles and teams defined in your configuration before you begin to register your users.

Most of the users will access Bright Pattern Contact Center via the Agent Desktop application. The exact set of functionality available to a logged-on user via this application depends on the role(s) assigned this user in your contact center configuration.

- The *Agent Guide* provides detailed instructions for the use of Agent Desktop by contact center agents and back-office (PBX) workers.
- The *Supervisor Guide* provides detailed instructions for the use of Agent Desktop by contact center supervisors and campaign operators.

Although most of the Agent Desktop functionality is implemented using thin-client technologies, some of its capabilities require a software component that is installed on users' computers. This component is called Agent Desktop Helper Application. For more information about the functions of this component and methods of its installation, see section Agent Desktop Helper Application.

The computers of users of the Agent Desktop application must conform to a number ofsystem requirements.

How to Define and Edit User Information

To view, define, and edit user information, select the **Users** option from the *Users & Teams* menu.

The Users list provides the following information:

- **First Name** - The first name of the user
- **Last Name** - The last name of the user
- **Extension** - The extension number of the user
- **Roles** - The assigned role(s) for the user (e.g., agent, supervisor, etc.)
- **Team** - The assigned team(s) for the user
- **Created on** - The date that the user was created in the system
- **Last login on** - The date of the user's last login to the system

Importing Users from a Spreadsheet

You can import user information from an Excel spreadsheet instead of entering it manually. You can also export user information to an Excel spreadsheet. Import and export operations are activated by the arrow buttons at the bottom of the user list view. For information about the spreadsheet format, click the **import** button. An easy way to obtain a user import template is to add a few users manually first, apply the export operation, and use the produced spreadsheet as an import template.

If you do not wish to use certain records during a particular instance of import, but you would like to keep those records in the spreadsheet for possible use in the future, you can add a column with name *Delete* to the spreadsheet and set its value to *yes* for the records that are not to be imported.

Screen Properties

Person tab

The **Person** screen properties are described as follows. Note that users can change some of their profile properties directly via the Agent Desktop application. These properties are marked with an asterisk (*). For more information, see section Configuring Your User Profile of the *Agent Guide*.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making a change to user information that appears in the user's profile, we recommend that all affected agents re-login to Agent Desktop and/or refresh their browser page.

Users > Person tab

Username

Username is the name that the user will enter when logging in to Agent Desktop or any other Bright Pattern application. Username is mandatory and must be unique within the contact center.

Note that a username can be changed; in order for changes to be made, this feature must be enabled by your service provider for your contact center. If enabled, username changes can be done only via the Contact Center Administrator application and the BPCC SCIM-Compliant User Provisioning API. Username changes cannot be done via the Agent Desktop application, user import, or the BPCC Configuration API.

When changing a username, please consider the following:

- Username change does not change the historical records created prior to the username change, which contain the old username. If a user's username is changed and you wish to include the user's data in historical reports from before and after the change, do the following:
  - From the Agent filter, select the user's current name.
  - From the Agent filter, select the **Show disabled/deleted agents** checkbox, then select the user's former name.
  - Please note that the Agent filter uses first and last name, so if the username was changed, but the first and last name stayed the same, a person with the same name may appear in both active and disabled/deleted users.
- If a user is logged into the Agent Desktop application when her username is changed, a banner displays the message, "Your username has changed. Please log out and log in with the new username." The user's softphone will continue the current call; however, they will not be able to refresh registration, accept, or make new calls.

Password

Password is the password that the user will enter when logging into Agent Desktop or any other Bright Pattern application. This field is displayed for new users only and its specification is mandatory. Note that some rules related to password complexity (i.e., length, special characters, etc.) may be defined and enforced at the service provider level.

Confirm password

The *Confirm password* field is mandatory.

Change password

The *Change password* option is displayed for existing users only, and it is used to change the selected user's password. This option will typically be used by an administrator to change passwords of other users. Users can change their own passwords via the Agent Desktop application.

API secret

The *API secret* is a unique, secret string that identifies the user (i.e., user credentials). The API secret is used during authentication to request an access token for Bright Pattern APIs, such as the Configuration API and others.

Disabled

Disabled indicates whether the user is active. Select this checkbox to disable user's access to all system functions temporarily. Disabled users are shown dimmed in the user list view.

Note that inactive user accounts may also be disabled automatically. See section Security Policy for more information. Disabled users are still counted as named users in your configuration.

User must change password on next login

This property indicates whether the user will be forced to change the password upon the next login. To comply with the PCI DSS security standard, select this checkbox for every new user.

As soon as the user changes the password, the check mark will be removed automatically. You can force the user to change password at any time by selecting this checkbox again.

This property exists to support manual password change enforcement. Note that the system also supports automatic password expiration. See section Security Policy for more information. The related automatic password changes are not reflected by this property.

Lockout

Lockout indicates whether this user can access the system or is currently locked out due to a security policy violation. See section Security Policy for more information. You can click the link to view current lockout status. If the user account is locked out, you can unlock it by clicking the **Unlock** button.

First name

First name is the user's first name. This field is mandatory.

Last name

Last name is the user's last name. This field is mandatory.

Team

Team is the team to which this user is assigned. A Bright Pattern Contact Center user must be assigned to a team, and a user cannot be assigned to more than one team. See section Teams for considerations regarding assignment of users to teams.

Note that teams may be associated with services. Upon assignment to such a team, the user may get a corresponding service skill with a certain level automatically. You can change the level or remove the skill from the user manually using the Skill Levels option.

Training Class

Training Class, a feature of the Omni QM module, allows you to define a training class for a given user. Training Classes are created in the Contact Center Administrator application, section Users & Teams > Training Classes. Training Class is used as an optional search parameter in select QM Reports; for more information, contact your service provider.

Supervisor in charge

Supervisor in charge, a feature of the Omni QM module, allows you to define a specific supervisor as being responsible for a given user. Supervisor in charge is used as an optional search parameter in select QM Reports; for more information, contact your service provider.

Record calls

The *Record calls* checkbox allow you to record a specific agent's calls. Note: If call recording is enabled as a global setting, this checkbox option will change to **Do not record calls** and you can mark specific agents to not record.

Title

Title is the user's job title. This property is used for information only. For user's access privileges, see section Roles below.

About me

About me is the optional information that users will typically enter themselves via their Agent Desktop profile settings.

Photo

This is the user’s photo. The photo will appear in the Contact Info Panel of the Agent Desktop application during internal communications. If you use chat services, the photo can also be displayed to customers when they communicate with this agent via chat. To upload a photo, click **upload**. To remove the photo, click **remove**.

The default maximum size of uploaded photos is 10 MB; the photo will be compressed to fit the user interface elements where it is displayed. Note that the maximum size of uploaded files may be further limited by your service provider.

Maximum concurrent chats - Limit number of chats on the agent

Maximum concurrent chats lets you define the total number of concurrent chats an agent will process at a given time. If this setting is configured, the system will choose the smaller number from between this setting and the Omni-Channel Routing setting for chat (i.e., if chat is configured at the maximum, too).

Note that when set to a lower number of chats than set in omni-channel routing, this setting will impact agent occupancy, where 100% of occupancy will be the maximum number of chats from the omni-channel routing setting, and less when clamped down by this per-user setting (e.g., 4 chats in omni-channel routing - 100%, clamped to 3 - 75%).

Contacts tab

Users > Contacts tab

Chat nickname

Chat nickname is the name that will be displayed to other parties when they communicate with this user via chat.

Rank

Rank is the user's rank. This optional setting can be used as an additional selection criterion in custom agent reports. This setting is essential for users who are agents only.

Phone extension

Phone extension is the extension number of the user'ssoftphone. This mandatory setting must contain numeric characters only and must be unique within the contact center. Note that if you have any hardphones registered in the system, their numbers cannot be assigned as users' phone extensions. See section Hardphones for more information.

The extension can be used in combination with a user's *PIN code for phone login* (see below) for authentication through interfaces that only accept numeric input (e.g., an IVR system).

Bright Pattern Contact Center assigns extension numbers to new users automatically in ascending order starting from 1000. You can change the default number to any other value. In this case, the default extension number assigned to the next new user will be the newly defined value + 1. Extension numbers are recycled (i.e., when you delete a user, that user's extension number will be assigned by default to the next new user).

A user's extension number cannot be changed while the user is logged on to that extension; if a change is attempted, an error message will display, *"Cannot change extension number while agent is logged on that extension."* Also note that the user can log in with a different number (e.g., a hardphone number).

For more information about user phone device options, see section Selecting a Phone Device of the *Agent Guide*.

Forward all calls for ext...

This indicates whether call forwarding is activated for the user's *phone extension.*

Call forwarding can also be activated via the extension's properties; see section Softphones. Section Forwarding and Voicemail Operation explains how forwarding will work with various phone devices that the user can select upon login.

Note that call forwarding takes priority over voicemail. If the user has had voicemail enabled (see below), activation of call forwarding for this user will automatically disable the voicemail function.

to

This field represents the phone number to which incoming calls will be forwarded. The phone number must be specified if the *Forward all calls to ext...* checkbox is selected.

Forward on no answer after

Forward on no answer after is the time (in seconds) after which incoming calls will be forwarded to the number specified if the user is logged on and does not answer. The amount of time must be specified if the *Forward all calls to ext...* checkbox is selected. For immediate (unconditional) forwarding, set the timeout to 0.

If the user is unreachable (busy or logged out), incoming calls will be forwarded to the specified number immediately, regardless of this setting.

Default hardphone number

Default hardphone number is the extension number of the hardphone assigned to the user. This setting is optional but if specified, it must be one of the existing hardphone extension numbers (see section Hardphones). This parameter should be defined only for users who normally use permanently assigned hardphones installed at their personal desks. To log into the Agent Desktop application with this hardphone, the user should select option **Default phone**. For more information about a user's phone device options, see section How to Select a Phone Device of the *Agent Guide*.

The call forwarding settings will not take effect on the default hardphone. Instead, the forwarding settings configured for the hardphone itself will apply (see section Hardphones).

Enable voicemail

Enable voicemail indicates whether the voicemail function is enabled for the user. For general voicemail settings, see section Voicemail.

Section Forwarding and Voicemail Operation explains how voicemail will work with various phone devices that the user can select upon login.

Note that call forwarding takes priority over voicemail. The voicemail function cannot be enabled if the user already has call forwarding activated. If the user has had voicemail enabled, a temporary activation of call forwarding for this user will automatically disable the voicemail function; however, the voicemail configuration (the *No Answer* timeout and current greeting) will be preserved and will take effect as soon as call forwarding is deactivated.

Send to voicemail after

Send to voicemail after is the time in seconds after which an incoming call will be forwarded to voicemail if the user is logged on and does not pick up the call. The amount of time must be specified if the *Enable voicemail* checkbox is selected.

If the user is unreachable (busy or logged out), incoming calls will be sent to the user's voicemail immediately, regardless of this setting.

Use this voicemail greeting

This option lets you upload up to three different personal voicemail greetings for the user and select which one should be used. Individual greetings may be deleted as necessary.

Users can also record their personal greetings directly via their Agent Desktop application. For more information see section Configuring Your Voicemail of the *Agent Guide*.

Work phone

Work phone is the user's work phone. This optional setting is used for informational purposes only.

Mobile phone

Mobile phone is the user's mobile phone number. This optional setting is used for informational purposes only.

PIN code for phone login

The PIN is the user's numeric password that can be used in combination with user's *Phone extension* for authentication through interfaces that accept only numeric input (e.g., an interactive voice response (IVR) system).

Email address

Email address is the user's email address that the system will use for delivery of password reset instructions, voicemail messages, and scheduled reports. It must be specified if the voicemail is enabled because the user will be notified of new voicemail messages via email.

Note that this email address is not used for distribution of service email interactions to the agents.

Location tab

This tab lets you specify various optional properties related to a user's geographical location.

Users > Location tab

Region

The geographic region for the user (e.g., "US"). This property is required.

Your contact center is associated with a region by default. The Region selector is used to initialize user region at the time of creation. If your service provider has enabled multiple regions to be used for your contact center, you will be able to select a non-default region for the user from the selector.

Time zone

The time zone for the user (e.g., "-08:00 America/Los_Angeles"). This property is required.

Country

The country in which the user works (e.g., "United States"). This property is optional.

State/Province

The state or province in which the user works (e.g., "CA"). This property is optional.

City

The city in which in which the user works (e.g., "San Bruno"). This property is optional.

Login Info tab

This tab provides a variety of user login information; it may be consulted for quick user diagnostics. The properties are as follows.

Users > Login Info tab

Last login

Captures the date and time the user is first authenticated within the system for the day (i.e., the Contact Center Administrator application or the Agent Desktop application); note that it is not updated if the user opens additional applications or changes to/from the Supervision mode

Last logout

Captures the date and time the user last logged out of the application for the day (i.e., the Contact Center Administrator application or the Agent Desktop application)

Browser type and version

Displays the name and the version of the web browser the user used in the most recent session

Selected phone device option

Displays the phone device option the user used in the most recent session

OS

Displays the name of the user's operating system

IP address (public)

The public IP address of the user

Raw User-Agent string

Displays the HTTP User-Agent browser identification header, which is automatically submitted by the web browser

Roles tab

A user can be assigned any number of roles that define what kind of system functionality can be accessed. For more information, see section Roles. Select a role from the list in order to assign it to the user.

Users > Roles tab

By default, new users do not have any roles assigned to them. Since the majority of users registered in your configuration are likely to be agents, you can configure automatic assignment of the *Agent* role to every new user. See the description of property *Assign this role to newly created users* in section Roles for more information.

Users

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Most of the users will access Bright Pattern Contact Center via the Agent Desktop application. The exact set of functionality available to a logged-on user via this application depends on the role(s) assigned this user in your contact center configuration.

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The computers of users of the Agent Desktop application must conform to a number ofsystem requirements.

How to Define and Edit User Information

To view, define, and edit user information, select the **Users** option from the *Users & Teams* menu.

Users & Teams > Users

The Users list provides the following information:

- **First Name** - The first name of the user
- **Last Name** - The last name of the user
- **Extension** - The extension number of the user
- **Roles** - The assigned role(s) for the user (e.g., agent, supervisor, etc.)
- **Team** - The assigned team(s) for the user
- **Created on** - The date that the user was created in the system
- **Last login on** - The date of the user's last login to the system

Importing Users from a Spreadsheet

You can import user information from an Excel spreadsheet instead of entering it manually. You can also export user information to an Excel spreadsheet. Import and export operations are activated by the arrow buttons at the bottom of the user list view. For information about the spreadsheet format, click the **import** button. An easy way to obtain a user import template is to add a few users manually first, apply the export operation, and use the produced spreadsheet as an import template.

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Person tab

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Users > Person tab

Username

Username is the name that the user will enter when logging in to Agent Desktop or any other Bright Pattern application. Username is mandatory and must be unique within the contact center.

Note that a username can be changed; in order for changes to be made, this feature must be enabled by your service provider for your contact center. If enabled, username changes can be done only via the Contact Center Administrator application and the BPCC SCIM-Compliant User Provisioning API. Username changes cannot be done via the Agent Desktop application, user import, or the BPCC Configuration API.

When changing a username, please consider the following:

- Username change does not change the historical records created prior to the username change, which contain the old username. If a user's username is changed and you wish to include the user's data in historical reports from before and after the change, do the following:
    - From the Agent filter, select the user's current name.
    - From the Agent filter, select the **Show disabled/deleted agents** checkbox, then select the user's former name.
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Password

Password is the password that the user will enter when logging into Agent Desktop or any other Bright Pattern application. This field is displayed for new users only and its specification is mandatory. Note that some rules related to password complexity (i.e., length, special characters, etc.) may be defined and enforced at the service provider level.

Confirm password

The *Confirm password* field is mandatory.

Change password

The *Change password* option is displayed for existing users only, and it is used to change the selected user's password. This option will typically be used by an administrator to change passwords of other users. Users can change their own passwords via the Agent Desktop application.

API secret

The *API secret* is a unique, secret string that identifies the user (i.e., user credentials). The API secret is used during authentication to request an access token for Bright Pattern APIs, such as the Configuration API and others.

Disabled

Disabled indicates whether the user is active. Select this checkbox to disable user's access to all system functions temporarily. Disabled users are shown dimmed in the user list view.

Note that inactive user accounts may also be disabled automatically. See section Security Policy for more information. Disabled users are still counted as named users in your configuration.

User must change password on next login

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As soon as the user changes the password, the check mark will be removed automatically. You can force the user to change password at any time by selecting this checkbox again.

This property exists to support manual password change enforcement. Note that the system also supports automatic password expiration. See section Security Policy for more information. The related automatic password changes are not reflected by this property.

Lockout

Lockout indicates whether this user can access the system or is currently locked out due to a security policy violation. See section Security Policy for more information. You can click the link to view current lockout status. If the user account is locked out, you can unlock it by clicking the **Unlock** button.

First name

First name is the user's first name. This field is mandatory.

Last name

Last name is the user's last name. This field is mandatory.

Team

Team is the team to which this user is assigned. A Bright Pattern Contact Center user must be assigned to a team, and a user cannot be assigned to more than one team. See section Teams for considerations regarding assignment of users to teams.

Note that teams may be associated with services. Upon assignment to such a team, the user may get a corresponding service skill with a certain level automatically. You can change the level or remove the skill from the user manually using the Skill Levels option.

Training Class

Training Class, a feature of the Omni QM module, allows you to define a training class for a given user. Training Classes are created in the Contact Center Administrator application, section Users & Teams > Training Classes. Training Class is used as an optional search parameter in select QM Reports; for more information, contact your service provider.

Supervisor in charge

Supervisor in charge, a feature of the Omni QM module, allows you to define a specific supervisor as being responsible for a given user. Supervisor in charge is used as an optional search parameter in select QM Reports; for more information, contact your service provider.

Record calls

The *Record calls* checkbox allow you to record a specific agent's calls. Note: If call recording is enabled as a global setting, this checkbox option will change to **Do not record calls** and you can mark specific agents to not record.

Title

Title is the user's job title. This property is used for information only. For user's access privileges, see section Roles below.

About me

About me is the optional information that users will typically enter themselves via their Agent Desktop profile settings.

Photo

This is the user's photo. The photo will appear in the Contact Info Panel of the Agent Desktop application during internal communications. If you use chat services, the photo can also be displayed to customers when they communicate with this agent via chat. To upload a photo, click **upload**. To remove the photo, click **remove**.

The default maximum size of uploaded photos is 10 MB; the photo will be compressed to fit the user interface elements where it is displayed. Note that the maximum size of uploaded files may be further limited by your service provider.

Maximum concurrent chats - Limit number of chats on the agent

Maximum concurrent chats lets you define the total number of concurrent chats an agent will process at a given time. If this setting is configured, the system will choose the smaller number from between this setting and the Omni-Channel Routing setting for chat (i.e., if chat is configured at the maximum, too).

Note that when set to a lower number of chats than set in omni-channel routing, this setting will impact agent occupancy, where 100% of occupancy will be the maximum number of chats from the omni-channel routing setting, and less when clamped down by this per-user setting (e.g., 4 chats in omni-channel routing - 100%, clamped to 3 - 75%).

Contacts tab

Users > Contacts tab

Chat nickname

Chat nickname is the name that will be displayed to other parties when they communicate with this user via chat.

Rank

Rank is the user's rank. This optional setting can be used as an additional selection criterion in custom agent reports. This setting is essential for users who are agents only.

Phone extension

Phone extension is the extension number of the user'ssoftphone. This mandatory setting must contain numeric characters only and must be unique within the contact center. Note that if you have any hardphones registered in the system, their numbers cannot be assigned as users' phone extensions. See section Hardphones for more information.

The extension can be used in combination with a user's *PIN code for phone login* (see below) for authentication through interfaces that only accept numeric input (e.g., an IVR system).

Bright Pattern Contact Center assigns extension numbers to new users automatically in ascending order starting from 1000. You can change the default number to any other value. In this case, the default extension number assigned to the next new user will be the newly defined value + 1. Extension numbers are recycled (i.e., when you delete a user, that user's extension number will be assigned by default to the next new user).

A user's extension number cannot be changed while the user is logged on to that extension; if a change is attempted, an error message will display, *"Cannot change extension number while agent is logged on that extension."* Also note that the user can log in with a different number (e.g., a hardphone number).

For more information about user phone device options, see section Selecting a Phone Device of the *Agent Guide*.

Forward all calls for ext...

This indicates whether call forwarding is activated for the user's *phone extension.*

Call forwarding can also be activated via the extension's properties; see section Softphones. Section Forwarding and Voicemail Operation explains how forwarding will work with various phone devices that the user can select upon login.

Note that call forwarding takes priority over voicemail. If the user has had voicemail enabled (see below), activation of call forwarding for this user will automatically disable the voicemail function.

to

This field represents the phone number to which incoming calls will be forwarded. The phone number must be specified if the *Forward all calls to ext...* checkbox is selected.

Forward on no answer after

Forward on no answer after is the time (in seconds) after which incoming calls will be forwarded to the number specified if the user is logged on and does not answer. The amount of time must be specified if the *Forward all calls to ext...* checkbox is selected. For immediate (unconditional) forwarding, set the timeout to 0.

If the user is unreachable (busy or logged out), incoming calls will be forwarded to the specified number immediately, regardless of this setting.

Default hardphone number

Default hardphone number is the extension number of the hardphone assigned to the user. This setting is optional but if specified, it must be one of the existing hardphone extension numbers (see section Hardphones). This parameter should be defined only for users who normally use permanently assigned hardphones installed at their personal desks. To log into the Agent Desktop application with this hardphone, the user should select option **Default phone**. For more information about a user's phone device options, see section How to Select a Phone Device of the *Agent Guide*.

The call forwarding settings will not take effect on the default hardphone. Instead, the forwarding settings configured for the hardphone itself will apply (see section Hardphones).

Enable voicemail

Enable voicemail indicates whether the voicemail function is enabled for the user. For general voicemail settings, see section Voicemail.

Section Forwarding and Voicemail Operation explains how voicemail will work with various phone devices that the user can select upon login.

Note that call forwarding takes priority over voicemail. The voicemail function cannot be enabled if the user already has call forwarding activated. If the user has had voicemail enabled, a temporary activation of call forwarding for this user will automatically disable the voicemail function; however, the voicemail configuration (the *No Answer* timeout and current greeting) will be preserved and will take effect as soon as call forwarding is deactivated.

Send to voicemail after

Send to voicemail after is the time in seconds after which an incoming call will be forwarded to voicemail if the user is logged on and does not pick up the call. The amount of time must be specified if the *Enable voicemail* checkbox is selected.

If the user is unreachable (busy or logged out), incoming calls will be sent to the user's voicemail immediately, regardless of this setting.

Use this voicemail greeting

This option lets you upload up to three different personal voicemail greetings for the user and select which one should be used. Individual greetings may be deleted as necessary.

Users can also record their personal greetings directly via their Agent Desktop application. For more information see section Configuring Your Voicemail of the *Agent Guide*.

Work phone

Work phone is the user's work phone. This optional setting is used for informational purposes only.

Mobile phone

Mobile phone is the user's mobile phone number. This optional setting is used for informational purposes only.

PIN code for phone login

The PIN is the user's numeric password that can be used in combination with user's *Phone extension* for authentication through interfaces that accept only numeric input (e.g., an interactive voice response (IVR) system).

Email address

Email address is the user's email address that the system will use for delivery of password reset instructions, voicemail messages, and scheduled reports. It must be specified if the voicemail is enabled because the user will be notified of new voicemail messages via email.

Note that this email address is not used for distribution of service email interactions to the agents.

Location tab

This tab lets you specify various optional properties related to a user's geographical location.

Users > Location tab

Region

The geographic region for the user (e.g., "US"). This property is required.

Your contact center is associated with a region by default. The Region selector is used to initialize user region at the time of creation. If your service provider has enabled multiple regions to be used for your contact center, you will be able to select a non-default region for the user from the selector.

Time zone

The time zone for the user (e.g., "-08:00 America/Los_Angeles"). This property is required.

Country

The country in which the user works (e.g., "United States"). This property is optional.

State/Province

The state or province in which the user works (e.g., "CA"). This property is optional.

City

The city in which in which the user works (e.g., "San Bruno"). This property is optional.

Login Info tab

This tab provides a variety of user login information; it may be consulted for quick user diagnostics. The properties are as follows.

Users > Login Info tab

Last login

Captures the date and time the user is first authenticated within the system for the day (i.e., the Contact Center Administrator application or the Agent Desktop application); note that it is not updated if the user opens additional applications or changes to/from the Supervision mode

Last logout

Captures the date and time the user last logged out of the application for the day (i.e., the Contact Center Administrator application or the Agent Desktop application)

Browser type and version

Displays the name and the version of the web browser the user used in the most recent session

Selected phone device option

Displays the phone device option the user used in the most recent session

OS

Displays the name of the user's operating system

IP address (public)

The public IP address of the user

Raw User-Agent string

Displays the HTTP User-Agent browser identification header, which is automatically submitted by the web browser

Roles tab

A user can be assigned any number of roles that define what kind of system functionality can be accessed. For more information, see section Roles. Select a role from the list in order to assign it to the user.

Users > Roles tab

By default, new users do not have any roles assigned to them. Since the majority of users registered in your configuration are likely to be agents, you can configure automatic assignment of the *Agent* role to every new user. See the description of property *Assign this role to newly created users* in section Roles for more information.

Working with Form Fields

The Chat Widget Configuration application allows you to build forms into your chat widgets, which customers will complete and submit to your contact center. The various field types and labels shown on the form may be edited or deleted. You can add more fields as needed.

Additionally, form fields may be referenced in scenarios by invoking the variable $(item.externalChatData), with the name of the field appended at the end of the string (e.g., $(item.externalChatData.form_field_name)).

Edit, add, and delete fields

How to Edit a Field

1. To change the field type or label text of a field, move your cursor over the field name and click **EDIT**.
2. Then change the field type and/or label.

How to Delete a Field

To remove any of these fields from the form, move your cursor over the field name and click the red **X**.

How to Add a Field

1. Click **add**.
2. Select the field type.
3. In the *Label* field, enter the text to be shown as the field label.

Field Types

Select from the following field types:

- **Label** - The name of the field
- **Callback phone number** - The phone number at which the customer wants to be called back
- **Phone number** - The customer's phone number
- **Email** - The customer's email address
- **Name** - The customer's name
- **Text** - Free-form text to be provided on the form
- **Date** - Today's date
- **Multiline text** - Multiple lines of text to be provided on the form
- **Numerical range slider** - A slider to be included on the form
- **Radio buttons** - Selectable buttons
- **Selection list** - Drop-down list of options
- **Captcha** - Proof that the customer is not a robot

Common Field Properties

When editing or creating new fields, many field types have common properties. They include the following:

Label Text

Filling in the *Label text* property will allow text to appear in the background of a field. The Label text will no longer be seen when a customer begins typing in this field.

Name

The *Name* property is used to collect data for a given field. For example, if you create a text field for a customer to enter their first name, *first_name* could be entered as the Name property value; it would then be associated with this field.

Rows

With the *Rows* property, it is possible to add rows to a multiline text field; this makes the text entry box larger. To change the number of rows, enter a numerical value. Please note, if a value of 0 or no value is entered, the default amount of rows shown is 2.

Min Value and Max Value

Min value and *Max value* are available only for the numerical range slider. Any numerical values may be entered but the slider will only work if the max value is greater than the min value.

Options

The *Options* property is available for the radio buttons and selection list fields. Under these fields, Options allows you to add selectable buttons to the chat widget.

Required Box

Checking the *Required box* property makes the field mandatory to fill out.

Validate

The *Validate* checkbox is shown only for the following field types: *phone number*, *callback phone number*, *email*, and *date*. If selected, the data entered in the field will be checked for general conformance with the corresponding data pattern. For details, see Validation of Form Field Data.

An example of form field properties

Validation of Form Field Data

For *phone number* and *callback phone number* fields, the data entered will be checked for the absence of any characters *except* the following:

- Digits
- Spaces
- Dashes "-”
- Slashes "/" and "\"
- Parentheses "(" and ")"
- Periods "."

- The plus sign "+" as the first character in the string only
- A maximum length of 30 characters

For *email* fields, the entered data will be checked for the following:

- The presence of ASCII characters only
- The presence of at least one @ symbol
- The presence of at least one character before the last@ symbol
- The presence of at least one period "." in the part following the last@ symbol
- A maximum length of 255 characters

For *date* fields, a calendar-view-based date picker will be used with options to show and/or store input in various date formats. The Date/Time control in the Form Builder application can be used as a reference.

Note that the validation functions are intended only to check that the entered data is entered in the correct format. That is, the functions are not expected to verify whether mailboxes, domains, or phone numbers actually exist, nor to modify the valid entered data in any way.

1. REDIRECT 5.3:Scenario-builder-reference-guide/Reference/VariablesandExpressions/Variables

1. REDIRECT 5.3:Scenario-builder-reference-guide/Reference/VariablesandExpressions/Variables

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 > 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.

Knowledge Base

Knowledge Base is a repository of articles that help agents quickly find answers to customer inquiries and improve response times via using predefined/approved text in email and chat communications.

To work with Knowledge Base, select the **Knowledge Base** option from the **Call Center Configuration** menu.

Note: While the Knowledge Base screen is the main interface for creation and editing of articles, you can also allow some of your agents to contribute to Knowledge Base directly from their Agent Desktops. Such agents, as well as any other users who are expected to contribute to Knowledge Base, must have the *Edit knowledge base* privilege. For more information about user roles and privileges, see section Roles.

Call Center Configuration > Knowledge Base

Using Folders and Subfolders

The list view of the Knowledge Base screen displays existing articles arranged in folders and subfolders.

How to create a folder at the root level

1. Select an existing folder at this level without unfolding it.
2. Click .

How to create a subfolder in a certain folder

1. Unfold and select the folder.
2. Click .

How to create an article in a certain folder

1. Unfold and select the folder.
2. Click .

How to export specific articles/folders

1. Select the articles or folders from the list and click .
2. In the dialog that appears, click **Export** to confirm. Doing so allows you to export the entire Knowledge Base or some selected sections (both folders and articles).

How to export the entire Knowledge Base

1. Click at any time.
2. In the dialog that appears, click **Export All**.

Knowledge Base content is exported in a zipped YAML file. You can edit the exported content using one of the editors that support YAML, such as Geany.

You can also import content into Knowledge Base. Content should be prepared as a zipped YAML file. To import, click and select the desired .zip file.

Screen Properties

The *Knowledge Base* screen properties are described as follows.

Name

The *name* of the folder or article is mandatory and must be unique within the folder.

Language

Language refers to the language(s) in which the article is written. For chats, language selection is controlled via scenarios. For emails, the system will automatically attempt to detect the language of incoming email messages. If the detection is successful, only articles written in the same language will be offered to the agent as possible replies.

Keywords

Keywords are statements of a customer problem or question that this article will address. In a more general sense, this field can be used for any kind of information that will help agents quickly assess relevance of the article to the interactions that they handle. Content of this field will not appear in the email draft or chat text input field.

Answer

Answer is the text that will be inserted into the email draft or chat text input field if the agent chooses to use this article. To insert a substitution field, click the **Insert $()** button. The following substitution fields can be used:

- *$(user.firstName)* – Agent's first name
- *$(user.lastName)* – Agent's last name
- *$(user.email)* – Agent's email address from agent's user settings; note that this setting is optional and may not have direct relevance to any email services; see section *Users* for more information
- *$(from.name)* – Customer's name (for email interactions, the display name taken from the *From:* field of the email for which the given reply is composed; for chat interactions, the names taken from the *first_name* and *last_name* fields in a pre-chat form)
- *$(from.emailAddress)* - Customer's email address (for email interactions, the email address taken from the *From:* field of the email for which the given reply is composed)
- *$(case.number)* – Number of the case this message is related to
- *$(app.emailAddress)* – Email address of the email scenario entry (this is the same address will appear in the *From:* field of any outgoing emails sent via this scenario entry); see section *Scenario Entries* > *Email* for more information
- *$(cursor)* – Position of the input text cursor immediately after the article is inserted

Usage notes

Usage notes are the notes, comments, and suggestions regarding usage of this article. The content of this field will not appear in the email draft or chat text input field.

Services

Services are the services that this article can be used for. The system automatically assigns a service to every customer interaction. When looking for articles, the agent will be able to limit search to the articles associated with the same service.

This is the default article for

This property names the service for which this article will be displayed as a suggested reply in the email draft pane or chat text input field of the agent desktop.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making a change to this property, we recommend that all affected logged-in agents refresh their browser page.

Custom Fields

With *Custom Fields*, an agent working on a call with an activity form may use a Knowledge Base article and use its contents to fill the form. When they click the **Use** button, a number of fields on the form will be prefilled with these associated custom field values. Fields may be created in the Knowledge Base Custom Fields subsection of *Case & Contact Management*. When editing a Knowledge Base article, custom fields can be filled or left empty.

An example of a Knowledge Base article with custom fields located at the bottom

Additionally, you may enter values that represent JSON arrays, which then prefill form text fields (e.g. [“option1”, “option2”, “option3”]. Doing this allows these text fields convert into combo boxes with these values/ options. If a value is not set for the article, the field does not prefill the form.

An example of a JSON array in a custom Knowledge Base field

Knowledge Base

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- *$(from.name)* – Customer's name (for email interactions, the display name taken from the *From:* field of the email for which the given reply is composed; for chat interactions, the names taken from the *first_name* and *last_name* fields in a pre-chat form)
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- *$(case.number)* – Number of the case this message is related to
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An example of a JSON array in a custom Knowledge Base field

How to Print an Email

A single-click control allows you to open, view, and print original email content in a pop-out tab or window of your web browser. The original email content can be printed using the "Print" option of the web browser itself. Note that the original email content includes CC and BCC fields from outgoing emails.

To print email content, follow these steps:

1. In either your Team Queue or Personal Queue, open the desired email by selecting it or double-clicking it in the list.

   Select the desired email to print

2. Mouse over the subject line of the email message. Doing so causes additional email control options appear.

Mouse over the email's subject line

3. Click the **Show original email content** button. The email message will open in a new browser tab or window, depending on your browser settings.

Email content in a separate browser window

4. Hit **Ctrl + P** (Windows) or **Command + P** (Mac) to print the page.

Print from your web browser