Version 5.3.7

Bright Pattern Documentation

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Table of Contents

List of All Real-Time Metrics

The following is a list of real-time metrics. The metrics are listed in alphabetical order by their full name; shortened names will be shown in parenthesis if available. Wallboard and Dashboard names will also be listed where applicable.

For a full list of the vocabulary used in metrics definitions, see Glossary. Additionally, for a list of all metrics by category, see Real-Time Metrics by Category. A grid view of these metrics can also be found in List of Statistics in the *Real-Time Statistic API* guide.

Agent Idle Time (Idle Time)

Metrics categories: Agent, Campaign

Agent Idle Time is the current idle time for agents, which is the number of seconds an agent has waited since the last interaction; it is calculated as the difference between the current time and time of last agent state change. Note that Idle Time includes Not Ready time.

Agent State

Metrics category: Agent

Agent State displays the current agent state in text form. For the Not Ready state, this metric includes the reason for not being ready, if available. Note that the same information is shown as an icon preceding agent's name. Agent states and icons are explained in detail in the Bright Pattern Contact Center *Agent Guide*, section Understanding and Handling Your States.

Agents Busy With Interactions of This Service (Busy Svc)

Wallboard name: *Agents busy with this service*
Metrics categories: Campaign, Service

Agents Busy With Interactions of This Service provides the number of agents who are currently handling interactions associated with the given service. This metric includes agents in the ACW state with respect to such interactions.

Agents in ACW State (ACW Count)

Metrics category: Campaign, Service, Team

Agents in ACW State is the number of agents currently handling After Call Work (ACW). When displayed as a total for several services, this metric shows the total number of distinct agents with the given service skill(s) in this state. Agents with skills corresponding to multiple services in the set are counted once.

Agents Ready (Ready)

Wallboard name: *Matching agents ready*
Metrics categories: Campaign, Skill, Service, Team

Agents Ready is the number of agents in Ready state. When displayed as a total for several services, this metric shows the total number of distinct agents with the given service skill(s) in this state. Agents with skills corresponding to multiple services in the set are counted once.

Average ACW Time (Avg ACW Time or AACW)

Dashboard name: *AACW*
Metrics category: Agent, Campaign, Service, Team

Average ACW Time is the average daily time agents spend handling [After Call Work (ACW)](). When displayed as a total for several services, this metric shows the average across all services in the set (i.e., it is calculated as the total sum of all durations across all services divided by the total sum of all interactions across all services).

Average Handle Time (IN Avg Handle Time)

Wallboard name: *Average handle time*
Metrics category: Agent, Campaign, Service, Team

Average Handle Time is the average time, including hold time and after-call-work time, that the agent has answered and handled calls to the service. When displayed as a total for several services, this metric shows the average across all services in the set (i.e., it is calculated as the total sum of all durations across all services divided by the total sum of all interactions across all services).

Average Idle Time (Avg Idle Time)

Wallboard name: *Average idle time of matching agents*
Metrics categories: Agent, Campaign, Service, Team

Average Idle Time is the average time that agents have waited between the handling of service interactions. When displayed as a total for several services, this metric shows the average across all services in the set (i.e., it is calculated as the total sum of all durations across all services divided by the total sum of all interactions across all services). Note that Avg Idle Time includes Not Ready time.

Average Preview Time (Avg Preview Time)

Wallboard name: *Average preview time of matching agents*
Metrics categories: Agent, Campaign, Service

Average Preview Time is the average time that agents reviewed records of previewed outbound campaigns, from the moment the preview record was accepted by agents and until it was either dialed or skipped. When displayed as a total for several services, this metric shows the average across all services in the set (i.e., it is calculated as the total sum of all durations across all services divided by the total sum of all interactions across all services).

Average Sentiment (Sentiment)

Metrics categories: Agent, Campaign

Average Sentiment is the average current sentiment of calls. When displayed as a total for several services, this metric shows the average across all services in the set (i.e., it is calculated as the total sum of all durations across all services divided by the total sum of all interactions across all services).

Average Speed of Answer/Reply (IN ASA)

Wallboard name: Average speed of answer/reply
Metrics categories: Service

Average Speed of Answer is the average time that the calls waited in the service queue before being answered. *Average Time to Reply* is the average time between email arrival and the sending of the first meaningful reply (acknowledgment is not considered a meaningful reply). This metric is a cumulative statistic calculated for all interactions since the reset time. When displayed as a total for several services, this metric shows the average across all services in the set (i.e., it is calculated as the total sum of all durations across all services divided by the total sum of all interactions across all services) and is common for both inbound calls and emails.

Average Success Rate - percentage of successful call attempts (ASR %)

Metrics category: Campaign

Average Success Rate is the percentage of successful call attempts out of the last several hundred call attempts made (250 attempts, by default). This metric is used to adjust the calling rate of a predictive campaign to achieve optimal occupancy of available agents without losing answered calls. Thus, the successful call attempt is defined as any call attempt that was answered and queued for delivery to an agent.

Busy Agents (Busy)

Wallboard name: Matching agents busy
Metrics categories: Campaign, Service, Team

Matching Agents Busy is the number of agents in a [Busy](#) state. When displayed as a total for several services, this metric shows the total number of distinct agents with the given service skill(s) in this state. Agents with skills corresponding to multiple services in the set are counted once.

Calendar Reminders (CAL Reminders)

Metrics categories: Agent, Team

Calendar Reminders is the number of entries in the [calendar events](#) queue with time in the future, allowing supervisors to see how many recalls are set up by team, per agent.

Calendar Reminders in the Past (CAL Overdue)

Metrics categories: Agent, Team

Calendar Reminders in the Past is the number of entries in the [calendar events](#) queue with time in the past, allowing supervisors to see how many recalls are overdue per team, per agent.

Call Handling Rate Per Hour (HR)

Dashboard name: HR
Metrics categories: Campaign, Team

Call Handling Rate Per Hour is the average of all calls made per agent per hour.

Callbacks Currently Waiting in Queue (CB Waiting)

Wallboard name: Callbacks in queue now
Metrics categories: Campaign, Service

Callbacks Currently Waiting in Queue is the current number of callback requests currently waiting in the [virtual queue](#) associated with the given service.

Callbacks Requested for the Day (CB Requested)

Wallboard name: Callbacks requested
Metrics categories: Campaign, Service

Callbacks requested is the number of inbound calls to the given service for the day that have chosen the [callback option](#). Note that this metric counts calls; therefore, if one call has requested the callback option multiple times, it will be counted once by this metric.

Campaign Mode (Mode)

Metrics category: Campaign

Campaign Mode displays the current dialer mode for a [campaign](#) ("preview, progressive, predictive").

Completed Records in Active Lists (Lists Completed)

Wallboard name: Completed records in active lists
Metrics categories: Campaign, List, Service

Completed Records in Active Lists is the number of records in active lists that have been marked as completed.

Completed Records with Personal Agent Assignments (Lists P.A. Completed or P.A. Completed)

Wallboard name: Completed records with personal agent assignments
Metrics categories: Agent, Campaign, List, Service

Completed Records with Personal Agent Assignments returns the number of personally assigned records completed since the beginning of the campaign. This metric is meaningful for preview campaigns only.

Count of Selected Dispositions

Wallboard name: Count of selected dispositions
Metrics categories: Service

Count of Selected Dispositions displays the total number of dispositions that are available for a given call service and then selected per interaction per day.

Custom Survey Metric 1 (Survey 1)

Wallboard name: Custom Survey Metric 1
Metrics categories: Agent, Service, Team

Custom Survey Metric 1 is the average percentage of customer survey responses based on a given metric within the survey. This number is calculated by taking the sum of all values, then dividing them by the total number of interactions, where surveys exist (i.e., the [Save Survey Results](#) block was used).

Custom Survey Metric 2 (Survey 2)

Wallboard name: Custom Survey Metric 2
Metrics categories: Agent, Service, Team

Custom Survey Metric 2 is the average percentage of customer survey responses based on an additional metric within the survey. This number is calculated by taking the sum of all values, then dividing them by the total number of interactions, where surveys exist (i.e., the [Save Survey Results](#) block was used).

Customer Satisfaction (CSAT)

Wallboard name: Customer Satisfaction
Metrics categories: Agent, Service, Team

Customer Satisfaction is the average result of surveys where the customer satisfaction question has been answered.

Estimated Campaign Duration (Est Duration)

Wallboard name: Estimated campaign duration
Metrics categories: Campaign, Service

Estimated Campaign Duration is the estimated length of time a campaign will run today with enough records to keep all logged-in agents busy.

Estimated Wait Time (IN EWT)

Wallboard name: Estimated wait time
Metrics categories: Campaign, Service

Estimated Wait Time is the estimated time a client will wait before being serviced. This metric includes callback requests. When this metric is displayed as a total for several services, it shows the value for the service where the wait time is currently the longest.

First Call Resolution (FCR)

Wallboard name: First Call Resolution
Metrics categories: Agent, Service, Team

First Call Resolution is the percentage of calls resolved by agents during a customer's first call. This number is calculated by dividing the sum of interactions marked as First Call Resolution by of all interactions, where save survey exists (i.e., the [Save Survey Results](#) block was used).

Inbound Calls Abandoned for the Day (IN Total Abandoned)

Wallboard name: Inbound abandoned
Metrics categories: Campaign, Service

Inbound Calls Abandoned for the Day is the number of inbound interactions terminated by the originating party.

Inbound Calls Abandoned in IVR for the Day (IN IVR Abandoned)

Wallboard name: Inbound abandoned in IVR
Metrics categories: Campaign, Service

Inbound Calls Abandoned in IVR for the Day is the number of inbound interactions terminated while being serviced by an [IVR](#) application.

Inbound Calls Abandoned in Queue for the Day (IN Queue Abandoned)

Wallboard name: Inbound abandoned in queue
Metrics categories: Campaign, Service

Inbound Calls Abandoned in Queue for the Day is the number of inbound interactions terminated by the originating party while waiting in queue.

Inbound Calls Abandoned While Ringing for the Day (IN Ringing Abandoned)

Wallboard name: Inbound abandoned while ringing
Metrics categories: Campaign, Service

Inbound Calls Abandoned While Ringing for the Day is the number of inbound calls terminated by the originating party while the line is ringing.

Inbound Calls Currently in IVR (IN in IVR)

Wallboard name: Inbound in IVR now
Metrics categories: Campaign, Service

Inbound Calls Currently in IVR is the number of inbound calls currently being processed by an[IVR](#) application.

Inbound Calls Currently Ringing (IN Ringing)

Wallboard name: Inbound ringing on agents now
Metrics categories: Campaign, Service

Inbound Calls Currently Ringing is the number of inbound calls currently ringing for agents.

Inbound Calls Dropped by System in IVR for the Day (IN IVR Dropped)

Wallboard name: Inbound dropped by system in IVR
Metrics categories: Campaign, Service

Inbound Calls Dropped by System in IVR for the Day is the number of inbound calls that have been disconnected by the system while being processed by an [IVR](#) application.

Inbound Calls Dropped by System in Queue for the Day (IN Queue Dropped)

Wallboard name: Inbound dropped by system in queue
Metrics categories: Campaign, Service

Inbound Calls Dropped by System in Queue for the Day is the number of inbound calls that have been disconnected by the system while waiting in queue.

Inbound Calls Dropped by System While Ringing for the Day (IN Ringing Dropped)

Wallboard name: Inbound dropped by system while ringing
Metrics categories: Campaign, Service

Inbound Calls Dropped by System While Ringing for the Day is the number of inbound calls that have been disconnected by the system while ringing.

Inbound Calls Duration Average for the Day (IN Avg Talk Time)

Wallboard name: Inbound duration average
Metrics categories: Agent, Campaign, Service

Inbound Calls Duration Average for the Day is the average of talk time of IN Handled calls. When displayed as a total for several services, this metric shows the average across all services in the set (i.e., it is calculated as the total sum of all durations across all services divided by the total sum of all interactions across all services).

Inbound Calls Duration Total for the Day (IN Total Talk Time)

Wallboard name: Inbound duration total
Metrics categories: Agent, Campaign, Service

Inbound Calls Duration Total for the Day is the sum of talk time of IN Handled calls.

Inbound Calls First Time Queued for the Day (IN Queued Unique)

Wallboard name: Inbound queued unique
Metrics category: Campaign

Inbound Calls First Time Queued for the Day is the number of inbound calls that entered queued state for the first time. This includes both inbound calls and callbacks dialed and answered by the customer.

Inbound Calls in IVR, Queue or on Agents Now (IN Calls in Progress)

Wallboard name: Inbound in IVR, queue or on agents now
Metrics categories: Campaign, Service

Inbound in IVR, Queue or on Agents Now is the number of in-progress, inbound calls that are in either IVR, service queue, or being handled by agents.

Inbound Calls Queued for the Day (IN Queued)

Wallboard name: Inbound queued
Metrics categories: Campaign, Service

Inbound Calls Queued for the Day is the number of inbound calls that enter a queued state for the day. This includes both inbound calls and callbacks dialed and answered by the customer.

Inbound Calls Rejected or Unanswered by Agents for the Day (IN Rejected)

Wallboard name: Inbound rejected or missed by agents
Metrics categories: Agent, Campaign, Service

Inbound Calls Rejected or Unanswered by Agents for the Day is the number of times agent state was moved by the system to not the [Not Ready](#) state. This includes both inbound calls and callbacks dialed and answered by the customer.

Inbound Calls Released by Agents for the Day (IN Agent Disconnected)

Wallboard name: Inbound released by agents
Metrics categories: Agent, Campaign, Service

Inbound Calls Released by Agents for the Day is the number of inbound calls disconnected by agents while talking to callers for the day. This includes both inbound calls and callbacks dialed and answered by the customer.

Inbound Calls Released by Callers for the Day (IN Remote Disconnected)

Wallboard name: Inbound released by callers
Metrics categories: Campaign, Service

Inbound Calls Released by Callers for the Day is the number of inbound calls ended by callers.

Inbound Calls Routed to Agents for the Day (IN Routed)

Wallboard name: Inbound routed to agents
Metrics categories: Campaign, Service

Inbound Calls Routed to Agents for the Day is the number of inbound calls that were queued and then routed to agents for the day.

Inbound Calls Self Serviced for the Day (IN Self Serviced)

Wallboard name: Inbound self serviced
Metrics categories: Campaign, Service

Inbound Calls Self Serviced for the Day is the number of inbound calls disconnected by the caller in [IVR](#) state with self-service flag set. This includes both inbound calls and callbacks dialed and answered by the customer.

Inbound Calls Short Abandoned in Queue for the Day (IN Queue Sh-Abandoned)

Wallboard name: Inbound short-abandoned in queue
Metrics categories: Campaign, Service

Inbound Calls Short Abandoned in Queue for the Day is the number of inbound interactions that have been terminated by the originating party while waiting in the service queue before the configured [Service Level threshold](#).

Inbound Emails Carried Over from Previous Day (IN Carried Over)

Wallboard name: Inbound emails carried over
Metrics categories: Agent, Campaign, Service

Inbound Emails Carried Over from Previous Day is the number of inbound emails that arrived at this service at any time before the reset time and remained unprocessed at the reset time. This metric includes both new emails and emails related to existing threads.

Inbound Emails Carried Over from Previous Day for New Cases (IN Carried Over New)

Wallboard name: Inbound emails carried over from previous day
Metrics categories: Agent, Campaign, Service

Inbound Emails Carried Over from Previous Day for New Cases is the number of inbound emails that arrived at this service the day before the reset time and remained unprocessed at the reset time. This metric includes both new emails and emails related to existing threads.

Inbound Emails Closed Without Reply for the Day (IN Closed)

Wallboard name: Inbound emails dispositioned without reply
Metrics categories: Agent, Campaign, Service

Inbound Emails Closed Without Reply for the Day is the number of inbound emails that have had been assigned a disposition but have not been replied to.

Inbound Emails Currently on Agents, Saved in Personal Queues (IN Desktop)

Wallboard name: Inbound emails in personal queues now
Metrics categories: Agent, Campaign, Service

Inbound Emails Currently on Agents, Saved in Personal Queues is the current number of inbound emails that have been pulled into an agent's personal queue. Note that this metric is not a number of cases, except in the specific situation when each case originates from an inbound email and contains only one inbound email. For more information about the difference between cases and emails, see the *Agent Guide*, section [Cases, Email, and Threads](#).

Inbound Emails Currently on Agents, Saved in Personal Queues, Waiting in Excess of SLA Time (IN Breached SLA)

Metrics categories: Agent, Campaign, Service

Inbound Emails Currently on Agents, Saved in Personal Queues, Waiting in Excess of SLA Time is processed emails that remained in agent personal queues that were not replied within the [service level agreement (SLA)](#) time.

Inbound Emails Offered to Agent for the Day (IN Offered)

Metrics categories: Agent, Campaign

Inbound Emails Offered to Agent for the Day is the total number of emails that were pushed to the agent in the given reporting interval. This metric does not include pulled or manually assigned emails.

Inbound Emails Pulled by Agent for the Day (IN Pulled)

Wallboard name: Inbound emails pulled by agent
Metrics categories: Agent, Campaign

Inbound Emails Pulled by Agent for the Day is the total number of emails that were pulled by the agent from the service queues in the given reporting interval. Approval queues are excluded.

Inbound Emails Replied for the Day (IN Replied)

Wallboard name: Inbound emails replied
Metrics categories: Agent, Campaign, Service

Inbound Emails Replied for the Day is the number of inbound emails that agents have replied to.

Inbound Emails Unanswered for the Day (IN Ignored)

Wallboard name: Inbound emails not accepted
Metrics categories: Agent, Campaign, Service

Inbound emails not accepted is the number of emails that were pushed to the agent and not accepted (returned back to queue or transferring agent). It does not include emails that went into receiving agent personal queue

Inbound Interactions Being Put on Hold by Agent(s) for the Day (IN on Hold)

Wallboard name: Inbound held
Metrics categories: Agent, Campaign

Inbound Interactions Being Put on Hold by Agent(s) for the Day is the number of inbound service calls put on hold by a user during her login session. The counter is reset when the user logs out.

Inbound Interactions Currently in IVR, Queue or on Agents (IN in Progress)

Metrics categories: Campaign, Service

Inbound Interactions Currently in IVR, Queue or on Agents counts the number of interactions currently in [IVR](#) with a particular Service as well as the number of interactions ringing or connected to agents for the service. It does not count the interactions in [wrap-up](#) state.

Inbound Interactions Currently in Queue (IN Waiting)

Dashboard name: Q
Wallboard name: Inbound in queue now
Metrics categories: Campaign, Skill, Service

Inbound Interactions Currently in Queue is the number of inbound calls currently in queued state. This includes both inbound calls and callbacks dialed and answered by the customer.

Inbound Interactions Currently Handled by Agents (IN Active)

Wallboard name: Inbound handled by agents now
Metrics categories: Agent
Inbound Interactions Currently Handled by Agents provides the number of inbound interactions currently being actively handled by agents. This metric includes all inbound interactions in the agents' active communications list (ACL), except the ones in the ACW phase. Note that emails in agents' *My Queues* are not considered active and are not included in this count.

Note that in earlier versions of Bright Pattern Contact Center, the voice-only equivalent of this metric was called*IN Talking*.

Inbound Interactions Handled by Agents for the Day (IN Handled)

Dashboard name: CH
Wallboard name: Inbound handled by agents
Metrics categories: Agent, Campaign, Service

Inbound Interactions Handled by Agents for the Day is the number of inbound interactions that have been handled by agents since the beginning of the day interval; it includes successful [virtual queue callbacks](). This metric will count all instances of possible transfers and conferences as separate interactions. For emails, this metric includes [IN Replied](), [IN Closed](), [IN Transferred](), and [IN Svc Changed]().

Inbound Interactions Received for the Day (IN Received)

Wallboard name: Inbound received
Metrics categories: Campaign, Service

Inbound Interactions Received for the Day is the number of inbound interactions that have requested this service since reset time. For emails, this metric includes both new emails and emails related to existing threads. Interactions received via transfer or service change are not included.

Inbound Interactions Received for the Day for New Cases (IN Received New)

Wallboard name: Inbound emails that created new cases
Metrics categories: Campaign, Service

Inbound Interactions Received for the Day for New Cases is the number of inbound emails which create new cases for the day. This metric excludes emails related to existing email threads.

Inbound Interactions Transferred by Agents for the Day (IN Transferred)

Dashboard name: CT
Wallboard name: Inbound transferred away
Metrics categories: Agent, Campaign, Service

Inbound Interactions Transferred by Agents for the Day is the number of inbound interactions that have been transferred to an external service.

Inbound Service Level Target

Wallboard name: Inbound Service Level target
Metrics categories: Campaign, Service

Inbound Service Level Target the target percentage of inbound interactions being serviced; this number is configured by system administrators.

Inbound Service Level Threshold

Wallboard name: Inbound Service Level threshold
Metrics categories: Campaign, Service

Inbound Service Level Threshold is the amount of time allotted to inbound service interactions.

Inbound Transfers Received for the Day (IN Transfers)

Wallboard name: Inbound received as transfers
Metrics categories: Agent, Campaign, Service

Inbound Transfers Received for the Day is the number of inbound call transfers.

Logged-in Agents (Logged In)

Wallboard name: Matching agents logged-in
Metrics categories: Campaign, Skill, Service, Team

Logged-in Agents is the number of agents currently logged into Agent Desktop in any [state](#) except Supervising. When displayed as a total for several services, this metric shows the total number of distinct agents with the given service skill(s) in this state. Agents with skills corresponding to multiple services in the set are counted once.

Max Inbound Wait Time (IN Max Wait)

Dashboard name: WT
Wallboard name: Inbound longest wait now
Metrics categories: Campaign, Skill, Service

Max Inbound Wait Time provides the current wait time of the inbound interaction that has been waiting in queue the longest and is still unanswered; this includes inbound calls, callbacks dialed and answered by customers, inbound chats, and inbound emails. Note that an interaction could wait in queue several times (i.e., it could be requeued for another service either automatically or manually). In this case, the metric shows the interaction for the service it is currently waiting for but calculates the total waiting time since the moment the interaction entered the first service queue. When this metric is displayed as a total for several services, it shows the value for the service where the wait time is currently the longest.

For inbound email interactions, note the following: This metric is the current wait time of the email that has been waiting in the queue the longest time (and is still waiting), compared to all other emails currently waiting in the same queue. This includes service closure hours and is available for both Push and Pull distribution modes. Note that for email services this metric is updated once per hour.

Most Frequent Dispositions (Top Dispositions)

Metrics category: Agent

Most Frequent Dispositions is the 10 most frequent disposition set by agent.

My ACW Time (ACW Time)

Metrics category: Agent

My ACW Time is the total number of seconds an agent was in [ACW](#) state. This metric is counted per agent per day.

My Break Time (BT)

Wallboard name: Break time total
Metrics category: Agent

My Break Time is the total number of seconds an agent was in the [Not Ready](#) state. This metric is counted per agent, per day.

My Busy Time (Busy Time)

Metrics category: Agent

My Busy Time is the total number of seconds an agent was in the [Busy](#) state. This metric is counted per agent, per day.

My Ready Time (Ready Time)

Metrics category: Agent

My Ready Time is the total number of seconds an agent was in the [Ready](#) state. This metric is counted per agent, per day.

My Success Rate (SR)

Dashboard name: SR
Wallboard name: Success rate
Metrics category: Agent, Campaign

My Success Rate is the percentage of calls handled per agent that received the Success disposition type divided by the total number of calls with this service. This metric is calculated for all services the agent handles.

My Team Success Rate (TR)

Dashboard name: TR
Wallboard name: Success rate
Metrics category: Campaign, Team

My Team Success Rate is the percentage of calls handled per team that received the Success disposition type divided by the total number of calls with this service. This metric is calculated with break-downs per service and per team.

Net Promoter Score (NPS)

Wallboard name: Net Promoter Score
Metrics categories: Agent, Service, Team

Net Promoter Score (NPS) is the percentage of points for all surveys where a response was given for the contact satisfaction question. The percentage is calculated out of the number of interactions, where surveys exist (i.e., the Save Survey Results block was used). The percentage is calculated by subtracting the percentage of promoters (values 9 and 10) by the percentage of detractors (values 0-6). For more information about NPS, see netpromoter.com/know.

Not Ready Agents (Not Ready)

Wallboard name: Matching agents not ready
Metrics categories: Campaign, Service, Team

Not Ready Agents is the number of agents in Not Ready state. When displayed as a total for several services, this metric shows the total number of distinct agents with the given service skill(s) in this state. Agents with skills corresponding to multiple services in the set are counted once.

Number of Inbound Emails Joined to Already Existing Case, Per Day (IN Joined)

Wallboard name: Inbound emails for existing queued cases
Metrics categories: Agent, Campaign, Service

Number of Inbound Emails Joined to Already Existing Case, Per Day is the total number of inbound emails for this service that have been joined to already existing cases.

Number of Interactions on Agent (Active)

Metric Categories: Agent, Campaign

Number of Interactions on Agent provides the number of interactions that are currently being actively handled by the agent (i.e., inbound and outbound). This metric includes all interactions in the agents' Active Communications List (ACL), including the ones in the ACW stage. Emails in agents' *My Queues* are not considered active and are not included in this count. If an agent has more than one active interaction, clicking on the value of this metric will "unfold" the agent's row into a list showing information about all interactions that are currently being handled by this agent. Note that in earlier versions of Bright Pattern Contact Center, the related metrics used to be called *# Calls* and *# Chats*, and email *My Queue* used to be called *Personal Queue*.

Number of Interactions Re-categorized from a Different Service by Agents (IN Svc Change Received)

Wallboard name: Number of interactions recategorized from a different service
Metrics categories: Campaign, Service

Number of Interactions Re-categorized from a Different Service by Agents counts the number of times agents have changed received interaction services from one service to another service.

Number of Interactions Recategorized to a Different Service by Agents (IN Svc Changed)

Wallboard name: Number of interactions recategorized to a different service
Metrics categories: Agent, Campaign, Service

Number of Interactions Recategorized to a Different Service by Agents counts the number of times agents have changed interaction services to one service from another service.

Number of New Emails Processed by Agents, Including Replied, Closed Without Reply, Transferred and Service Changes (IN Handled New)

Wallboard name: Inbound emails handled
Metrics categories: Agent, Campaign, Service

Number of New Emails Processed by Agents, Including Replied, Closed Without Reply, Transferred and Service Changes is the number of first actions (reply, closed without reply, transfers and service changes) on new cases/threads. This metric counts only on the first action of an agent per email thread.

Number of Records Excluded by DNC Lists from Active Lists (Lists DNC)

Wallboard name: Number of records excluded by DNC lists from active lists
Metrics categories: Campaign, List, Service

Number of Records Excluded by DNC Lists from Active Lists is the total number of records that are excluded from active lists because they also appear on [Do Not Call (DNC)](#) lists.

Number of Records in Quota Groups That Reached Quota Limits (Out of Quota)

Wallboard name: Records in quota groups that reached quota limits
Metrics category: Service

Number of Records in Quota Groups That Reached Quota Limits is the number of non-finalized records that belong to quota groups that have reached the quota limits. The purpose of this metric is to provide a view on the number of remaining dialable records from a campaign.

Number of Records With a Success Disposition (Successes)

Metrics categories: List, Service

Number of Records With a Success Disposition is the number of records received with any of the success dispositions.

Occupancy in Campaign/Service (Occupancy)

Wallboard name: Occupancy of matching agents
Metrics categories: Agent, Campaign, Service, Team

Occupancy in Campaign/Service is the percentage of time agents have spent handling interactions of the given service (including the preview time and after-call work) out of their total working time (i.e., the time the agents have spent handling interactions of any service and being [Ready](#) to handle interactions).

Outbound Answered Calls That Did Not Connect to Agent in Compliance Time, Per Day (OUT Unattended)

Wallboard name: Outbound calls answered, out of connection speed compliance
Metrics categories: Campaign, Service

Outbound calls answered, out of connection speed compliance is the number of outbound calls answered that do not meet a minimum connection speed.

Outbound Call Attempts Currently in Progress (OUT in Progress)

Wallboard name: Outbound call attempts in progress now
Metrics categories: Campaign, Service

Outbound Call Attempts Currently in Progress is the number of outbound calls in a dialing or [call progress analysis (CPA)](#) state.

Outbound Call Attempts for the Day (OUT Dialed)

Dashboard name: CM
Wallboard name: Outbound call attempts
Metrics categories: Campaign, Service

Outbound Call Attempts for the Day is the total number of outbound calls agents have placed for the day.

Outbound Calls Abandoned at any Stage for the Day (OUT Abandoned)

Wallboard name: Outbound calls abandoned
Metrics categories: Campaign, Service

Outbound Calls Abandoned at any Stage for the Day is the number of outbound calls that have been terminated by agents for the day.

Outbound Calls Abandoned in IVR for the Day (OUT IVR Abandoned)

Wallboard name: Outbound calls abandoned in IVR
Metrics categories: Campaign, Service

Outbound Calls Abandoned in IVR for the Day is the number of outbound calls terminated while being processed by an [IVR](#) application for the day.

Outbound Calls Abandoned in Queue for the Day (OUT Queue Abandoned)

Wallboard name: Outbound calls abandoned in queue
Metrics categories: Campaign, Service

Outbound Calls Abandoned in Queue for the Day the number of outbound calls that have been terminated while waiting in the service queue.

Outbound Calls Abandoned While Ringing for the Day (OUT Ringing Abandoned)

Wallboard name: Outbound calls abandoned while ringing
Metrics categories: Campaign, Service

Outbound Calls Abandoned While Ringing for the Day is the number of outbound calls disconnected by customers while ringing on agents for the day.

Outbound Calls Attempts Failed for the Day (OUT Failed)

Wallboard name: Outbound calls attempts failed
Metrics categories: Campaign, Service

Outbound Calls Attempts Failed for the Day is the number of outbound calls initiated by agents and not answered by customers for a particular service for the day.

Outbound Calls Currently in IVR (OUT in IVR)

Wallboard name: Outbound calls in IVR %
Metrics categories: Campaign, Service

Outbound Calls Currently in IVR is the percentage of all outbound calls being processed by an IVR application out of all current outbound calls. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Outbound Calls Currently in Queue (OUT Waiting)

Wallboard name: Outbound calls in queue now
Metrics categories: Campaign, Service

Outbound Calls Currently in Queue is the number of outbound calls currently in Queued state.

Outbound Calls Delivered to Agents and Currently Ringing (OUT Ringing)

Wallboard name: Outbound calls ringing on agents now
Metrics categories: Campaign, Service

Outbound Calls Delivered to Agents and Currently Ringing is the number of outbound calls currently in Delivery Pending state (ringing on the agent, waiting for agent answer).

Outbound Calls Dropped in IVR for the Day (OUT IVR Dropped)

Wallboard name: Outbound calls dropped in IVR
Metrics categories: Campaign, Service

Outbound Calls Dropped in IVR for the Day is the number of outbound calls that have been disconnected by the system while being processed by an IVR application.

Outbound Calls Dropped in Queue for the Day (OUT Queue Dropped)

Wallboard name: Outbound calls dropped in queue
Metrics categories: Campaign, Service

Outbound Calls Dropped in Queue for the Day is the number of outbound calls that have been disconnected by the system while waiting in queue.

Outbound Calls Dropped While Ringing for the Day (OUT Ringing Dropped)

Wallboard name: Outbound calls dropped while ringing
Metrics categories: Campaign, Service

Outbound Calls Dropped While Ringing for the Day is the number of outbound calls that have been disconnected by the system while the line is ringing for agents for the day.

Outbound Calls Duration Average for the Day (OUT Avg Talk Time)

Wallboard name: Outbound calls duration average
Metrics categories: Agent, Campaign, Service

Outbound Calls Duration Average for the Day is the average talk time for [OUT Handled](link) calls. When displayed as a total for several services, this metric shows the average across all services in the set (i.e., it is calculated as the total sum of all durations across all services divided by the total sum of all interactions across all services).

Outbound Calls Duration Total for the Day (OUT Total Talk Time)

Wallboard name: Outbound calls duration total
Metrics categories: Agent, Campaign, Service

Outbound Calls Duration Total for the Day is the sum of talk time of [OUT Handled](link) calls.

Outbound Calls Queued for the Day (OUT Queued)

Wallboard name: Outbound calls queued
Metrics categories: Campaign, Service

Outbound Calls Queued for the Day is the number of outbound calls waiting in the service queue.

Outbound Calls Rejected or Unanswered by Agents for the Day (OUT Rejected)

Wallboard Name: Outbound calls rejected or missed by agents
Metrics categories: Agent, Campaign, Service, Team

Outbound calls rejected or missed by agents is the number of outbound calls that have been either rejected or unanswered by agents.

Outbound Calls Released by Agent for the Day (OUT Agent Disconnected)

Wallboard name: Outbound calls released by agent
Metrics categories: Campaign, Service

Outbound Calls Released by Agent for the Day is the number of outbound calls ended by agents.

Outbound Calls Released by Remote Party for the Day (OUT Remote Disconnected)

Wallboard name: Outbound calls released by remote party
Metrics categories: Campaign, Service

Outbound Calls Released by Remote Party for the Day is the number of outbound calls ended by the customer.

Outbound Calls Routed to Agents for the Day (OUT Routed)

Dashboard name: CRA
Wallboard name: Outbound calls routed to agents
Metrics categories: Campaign, Service

Outbound Calls Routed to Agents for the Day is the number of outbound calls that were queued and then routed to agents for the day. If a call is routed to an agent more than once with the same service, it is counted multiple times.

Outbound Calls Self Serviced for the Day (OUT Self Serviced)

Wallboard name: Outbound calls self serviced
Metrics categories: Campaign, Service

Outbound Calls Self Serviced for the Day is the number of outbound calls that have been terminated with a Self-Service indicator while being processed by an IVR application.

Outbound Calls Transferred by Agents for the Day (OUT Xfers or OUT Transferred)

Wallboard name: Outbound calls transferred away
Metrics categories: Campaign, Service

Outbound Calls Transferred by Agents for the Day is the number of outbound calls where agents initiate transfers for the day (either to queue, another agent or external number).

Outbound Current Calling Rate (OUT Call Rate)

Dashboard name: CR
Wallboard name: Outbound calling rate now
Metrics categories: Campaign, Service

Outbound Current Calling Rate is the current number of outbound calls being attempted by agents per minute.

Outbound Emails Currently on Agents, Saved in Personal Queues (OUT Desktop)

Wallboard name: Outbound emails in personal queue
Metrics categories: Agent, Campaign

Outbound Emails Currently on Agents, Saved in Personal Queues is the number of saved drafts of outbound emails that remained in agent personal queues.

Outbound Interactions Currently Handled by Agents (OUT Active)

Wallboard name: Outbound interactions handled by agents now
Metrics categories: Campaign, Service

Outbound Interactions Currently Handled by Agents is the number of outbound interactions currently being handled and completed by agents.

Outbound Interactions Handled by Agents for the Day/ Number of Unsolicited Emails and Follow-up Responses (OUT Handled)

Dashboard name: OCH
Wallboard name: Outbound interactions handled by agents (email - send non-replies)
Metrics categories: Agent, Campaign, Service, Team

Outbound Interactions Handled by Agents for the Day/ Number of Unsolicited Emails and Follow-up Responses is the number of outbound interactions that have been handled by agents; it includes campaign calls. For emails, this includes both new outbound emails and possible follow-up email messages related to existing email threads but does not include emails that have been started and discarded without sending.

Outbound Successful Calls Attempts for the Day (OUT Answered)

Wallboard name: Outbound calls attempts successful
Metrics categories: Campaign, Service

Outbound Successful Calls Attempts for the Day is the number of successful outbound call attempted by agents.

Percentage of Calls That Did Not Connect to Agent in Compliance Time, Per Day (OUT Unattended %)

Wallboard name: Outbound calls answered, out of connection speed compliance %
Metrics categories: Campaign, Service

Percentage of Calls That Did Not Connect to Agent in Compliance Time, Per Day is the percentage of all outbound calls answered that do not meet a minimum connection speed. This number is calculated by dividing the total number of unattended calls per day by the total number of outbound calls queued per day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Inbound Calls Abandoned for the Day (IN Total Abandoned %)

Wallboard name: Inbound abandoned %
Metrics categories: Campaign, Service

Percentage of Inbound Calls Abandoned for the Day is the percentage of inbound interactions terminated by the originating party out of all calls received for the day. This number is calculated by dividing the total number of inbound abandoned calls per day by the total number of calls received per day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Inbound Calls Abandoned in Queue for the Day (IN Queue Abandoned %)

Wallboard name: Inbound abandoned in queue %
Metrics categories: Campaign, Service

Percentage of Inbound Calls Abandoned in Queue for the Day is the percentage of inbound interactions terminated by the originating party while waiting in queue out of all inbound calls received for the day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Inbound Calls Handled for the Day (IN Handled %)

Wallboard name: Inbound handled by agents %
Metrics categories: Campaign, Service

Percentage of Inbound Calls Handled for the Day is the percentage of all inbound interactions that have been handled and completed by agents out of all inbound calls received for the day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Inbound Calls Short Abandoned in Queue for the Day (IN Queue Sh-Abandoned %)

Wallboard name: Inbound short-abandoned in queue %
Metrics categories: Campaign, Service

Percentage of Inbound Calls Short Abandoned in Queue for the Day is the percentage of inbound interactions that have been terminated by the originating party while waiting in the service queue before the configured [Service Level threshold](). This number is calculated by dividing the total number of inbound calls short-abandoned in queue per day by the total number of inbound calls queued per day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Inbound Interactions Answered in Service Level Over 20 Most Recent Calls (IN Svc Level % or SLA)

Dashboard name: SLA
Wallboard name: Inbound interactions answered in Service Level % (moving window)
Metrics categories: Campaign, Service

Inbound interactions answered in Service Level % (moving window) is the percentage of interactions answered before the threshold time (20 seconds by default) relative to all answered and abandoned interactions (except short abandoned) calculated over most recent 20 calls. For email interactions, it is the percent of emails replied to within the pre-defined [Service Level threshold](), relative to all replied emails. When this metric is displayed as a total for several services, it shows the value for the service where the service level is currently the lowest.

Percentage of Inbound Interactions Answered in Service Level Over the Day (IN Svc Level Day %)

Wallboard name: Inbound interactions answered in Service Level %
Metrics categories: Campaign, Service

Percentage of Inbound Interactions Answered in Service Level Over the Day is the percentage of calls answered before the threshold time (20 seconds by default) relative to all answered and abandoned interactions (except short abandoned) calculated for the day. For email interactions, it is the percentage of emails replied to within the pre-defined [Service Level threshold](), relative to all replied emails. When this metric is displayed as a total for several services, it shows the value for the service where the service level is currently the lowest.

Percentage of Outbound Calls Abandoned at any Stage for the Day (OUT Abandoned %)

Wallboard name: Outbound calls abandoned %
Metrics categories: Campaign, Service

Percentage of Outbound Calls Abandoned at any Stage for the Day is the percentage of calls that were dropped by customers in [IVR](#) or in Queue (including short and long waits) before being answered by agents out of all calls entered in IVR for the day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Outbound Calls Abandoned in IVR for the Day (OUT IVR Abandoned %)

Wallboard name: Outbound calls abandoned in IVR %
Metrics categories: Campaign, Service

Percentage of Outbound Calls Abandoned in IVR for the Day is the percentage of calls that were dropped by customers in the [IVR](#) scenario out of all calls entered in IVR for the day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Outbound Calls Abandoned in Queue for the Day (OUT Queue Abandoned %)

Wallboard name: Outbound calls abandoned in queue %
Metrics categories: Campaign, Service

Percentage of Outbound Calls Abandoned in Queue for the Day is the percentage of calls that were dropped by customers while waiting in queue for an agent out of all calls entered in queue for the day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Outbound Successful Call Attempts for the Day (OUT Answered %)

Wallboard name: Outbound calls attempts successful %
Metrics categories: Campaign, Service

Percentage of Outbound Successful Call Attempts for the Day is the percentage of successful outbound calls attempted by agents out of all calls attempted for the day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Records Attempted for the Day (Attempted %)

Wallboard name: Records attempts %
Metrics categories: Campaign, List, Service

Percentage of Records Attempted for the Day is the percentage of records attempts during a campaign out of all records for the day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Records Completed for the Day (Completed %)

Wallboard name: Records completions %
Metrics categories: Campaign, List, Service

Percentage of Records Completed for the Day is the percentage of completed records from a campaign for the day out of the sum of completed and remaining records for the day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Records Completed in Active Lists (Active Lists Completed %)

Wallboard name: Records completed in active lists %
Metrics categories: Campaign, List, Service

Percentage of Records Completed in Active Lists is the percentage of records completed per campaign out of the sum of completed and remaining records for the currently enabled lists. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Records Skipped for the Day (Skipped %)

Wallboard name: Records skips %
Metrics categories: Agent, Campaign, Service

Percentage of Records Skipped for the Day is the percentage of records skipped per agent, per day, out of the total number of records the agent previewed. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Quota of Successes for the Calling List Quota Group (Quota)

Metrics categories: List

Quota of Successes for the Calling List Quota Group is the number of records that must receive a success disposition in this quota group. For disposition-based groups, it counts only the specific disposition of the group. For source field-based groups, it counts any success disposition.

Records Attempted for the Day (Attempted)

Wallboard name: Records attempts
Metrics categories: Campaign, List, Service

Records Attempted for the Day is the number of records from a campaign where contact has been attempted, including the records that are currently being attempted.

Records Completed for the Day (Completed)

Wallboard name: Records completions
Metrics categories: Campaign, List, Service

Records Completed for the Day is the number of records from a campaign that have been completed (i.e., the records for which final dispositions have been set).

Records Dialable Right Now (Dialable)

Metrics categories: Campaign, List, Service

Records Dialable Right Now displays the number of records in the list/campaign of non-closed records that can be called right now (taking into account calling hours and reschedule limitations). Please note, if the number of dialable records is more than 1000, the statistic will show "1000+". If the number of records is less than 1000, the statistic will show the actual number.

Records Expired (Expired)

Metrics categories: Campaign, List, Service

Records Expired displays the number of records in the list that have expired since they have been exported. The expiration is defined in calling list configuration.

Records Previewed for the Day (Previewed)

Wallboard name: Records previews
Metrics categories: Agent, Campaign, Service

Records Previewed for the Day is the number of preview interactions from a campaign for the day that agents have accepted (including auto-accepted ones).

Records Skipped for the Day (Skipped)

Wallboard name: Records skips
Metrics categories: Agent, Campaign, Service

Records Skipped for the Day is the number of records agents have accepted from a campaign but then skipped (canceled) per day.

Records State Chart (State Chart)

Metrics categories: Campaign, List, Service

Records State Chart returns 4 arrays of numbers: completed, rescheduled, remaining, and auto-completed. All arrays are indexed by attempt number. The attempt number is a record attempt number (retries are not counted).

- The first array (completed) contains the percentage (0-100) of records completed at this attempt number by agents. The percentage is counted by dividing by the List Records metric.

- The second array (rescheduled) contains the percentage of records rescheduled from this attempt number to the next attempt number; the percentage is calculated out of all list records.

- The third array (remaining) contains the percentage of records remaining not attempted on this attempt out of all list records.

- The fourth array (auto-completed) contains the percentage (0-100) of records completed at this attempt number by dialer (either by hitting a [DNC](#) record or reaching max attempts). The percentage is counted by dividing by the List Records metric.

Remaining Records in Active Lists (Lists Remaining or RR)

Dashboard name: RR
Wallboard name: Remaining records in active lists
Metrics categories: Campaign, List, Service

Remaining Records in Active Lists is the approximate number of remaining records from a campaign (not including records from disabled lists).

Remaining Records With Personal Agent Assignments (Lists P.A. Remaining)

Wallboard name: Remaining records with personal agent assignments
Metrics categories: Agent, Campaign, List, Service

Remaining Records With Personal Agent Assignments is the approximate number of remaining records from a campaign that have assigned personal agents (not including records from disabled lists).

Selected Dispositions Percentage

Wallboard name: Selected dispositions percentage
Metrics categories: Service

Selected Dispositions Positions displays the total percentage of dispositions that have been selected from all inbound calls out of all dispositioned calls; the metric is displayed per service per day.

Time in Preview (Preview Duration)

Wallboard name: Preview duration now
Metrics categories: Agent, Campaign

Time in Preview is the number of seconds the agent is spending in the[Busy](#) state with preview interaction. The metric returns a value of 0 if the agent is not doing a preview interaction at the moment.

Total Number of Records in Active Lists (Lists Records)

Wallboard name: Count of records in all active lists
Metrics categories: Campaign, Lists, Service

Total Number of Records in Active Lists is the number of all records, completed and remaining, in all currently enabled lists.

Unique Inbound Calls Handled by Agents for the Day (IN Handled Unique)

Wallboard name: Inbound handled unique
Metrics categories: Agent, Campaign, Service

Unique Inbound Calls Handled by Agents for the Day is the number of inbound service calls handled by all agents since the beginning of the day interval. If the same customer call is handled by multiple agents (blind transfer or conference), this metric is increased only on the first answer by the first agent. This includes both inbound calls and callbacks dialed and answered by the customer.

Unique Inbound Interactions Being Put on Hold by Agent(s) for the Day (IN on Hold Unique)

Wallboard name: Inbound held, non-transferred
Metrics categories: Agent, Campaign

Unique Inbound Interactions Being Put on Hold by Agent(s) for the Day is the number of unique inbound service calls put on hold by a user during his login session. The counter is reset when the user logs out.

About

The *Twitter Integration Guide* explains the steps required to integrate your Twitter account with your Bright Pattern Contact Center environment, which is for the purpose of allowing Direct Messages (DMs) to be processed as chat interactions.

Outbound - General

The following general campaign settings are configured in the *General* section of the Services and Campaigns [Outbound tab](#).

General Settings
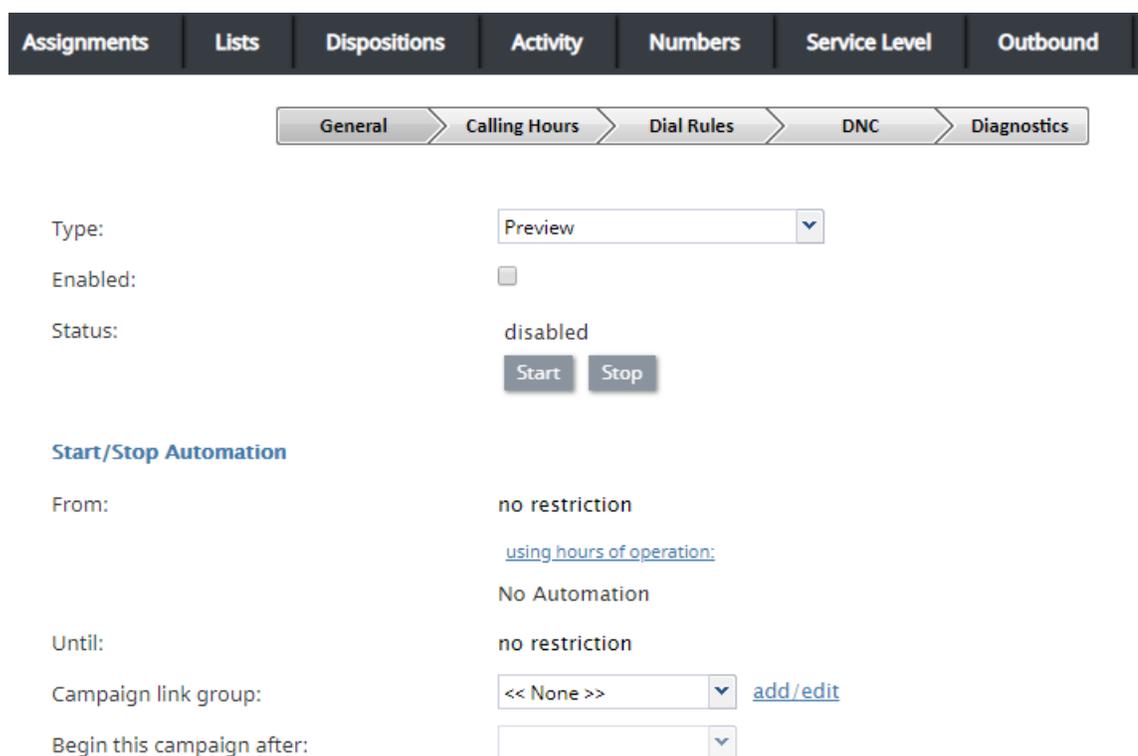
Outbound campaign general settings

Type

This is the type of campaign. There are four different campaign types from which to choose.

- In campaigns of the *Preview* type, the calling records are submitted to the agents participating in the campaign. The agents review record information, dial destination numbers, and monitor call progress. Additionally, this type of campaign allows agents to be reserved for a requested callback without indication to the agent.
- In campaigns of the *Progressive* type, the system automatically dials numbers from list records according to a

fixed (preconfigured) dialing rate, monitors call progress, and connects successful (answered) call attempts to available agents.
- In campaigns of the *Predictive* type, the system automatically dials numbers from list records according to currently optimal dialing rates, monitors call progress, and connects successful (answered) call attempts to available agents. The dialing rate is optimized to maintain the desired agent occupancy based on the statistical analysis of outcomes of most recent dialing attempts.
- In campaigns of the *Automatic (IVR)* type, the system automatically dials numbers from list records, monitors call progress, and connects successful (answered) call attempts to a prerecorded interactive voice response (IVR) message. Note that because agents are not involved in campaigns of this type, it may require different kind of license and may have to be explicitly enabled for you by your service provider.

Note that the definition of some of the subsequent campaign properties will depend on the selected campaign type.

Enabled

Enabled indicates the current state of the campaign. By default, the campaign is disabled and normally it should remain in this state until it is completely configured. Completeness of campaign configuration can be verified via the *Diagnostics* page. After the campaign has been completely configured, select the *Enabled* checkbox to indicate that it is ready to run.

Campaigns can be disabled again when they are no longer active but have to remain in configuration to ensure availability of campaign results. Note that disabling of campaigns is always a manual operation.

Note: For blended services, you should keep the outbound portion of a service enabled at all times, even during the periods without any outbound activity. If you disable the outbound portion, dispositions of the possible callbacks made to the campaign caller ID may not be processed correctly. This may result in repeated attempts to contact customers who are not supposed to be contacted again within the given campaign (e.g., accepted the campaign offer or requested not to be called again). If you need to prevent the outbound portion of a blended service from making calls, remove all of its calling hours.

Status

Status shows whether the outbound campaign has started or if it is stopped (i.e., ready to run). Click **Start** or **Stop** to change the status of the outbound campaign.

Start / Stop Automation

After the campaign has been enabled, it can be started and stopped manually at any time using these buttons.

Note that a campaign also can be started and stopped manually form the Agent Desktop application by a user designated as an operator for this campaign.

The campaign can be started and stopped automatically using the combination of the *From/Until* and *using hours of operation* settings as described below.

From

From indicates the moment from which this campaign can be started automatically based on the service *hours of operation* defined in the *Properties* tab.

If specified, the campaign will start automatically at the specified time provided that this time is within the specified service hours of operation. If the specified time is outside of the service hours, the campaign will start automatically at the nearest service opening time following the specified campaign start time.

Note that this parameter controls automatic campaign start only. Even if it is defined, the campaign can still be started earlier [manually](#).

using hours of operation

By default, the campaign will be run automatically according to the *hours of operation* specified in [the *Properties* tab](#) for the given outbound service. If you click this link, you will be taken to the tab where you can modify the service hours.

Note that this schedule reflects the time when the agents of the associated teams will be expected to handle interactions of the given campaign. This schedule is normally defined for the time zone where your contact center is located. The actual calling schedules for various types of phones and other possible time-related calling restrictions are defined in the [*Calling Hours* page](#) relative to the time zone of destination phone numbers.

Until

Until indicates the moment when this campaign will be terminated automatically even if processing of some of the calling records has not been finished or attempted. This setting will not affect the campaign-related calls that may be in progress at the specified time.

Note that this parameter controls automatic campaign termination only. Even if it is defined, the campaign can still be [started or resumed manually](#) later.

Campaign link group

Campaigns of the same type with the same [hours of operation](#), and same [assigned agent teams](#) can be linked together so that, when processing of all records of one campaign is finished, the next campaign in the group will be started automatically.

To associate this campaign with an existing group select the group from the list. If there are other campaigns associated with the selected list, the system will ask you to confirm that the type of this campaign, its hours of operation, assigned teams, and skills will be redefined to match the corresponding settings of campaigns already in the group.

The service parameters whose settings are controlled by the link group membership will be highlighted with orange dots.

To remove the campaign from a link group it was previously assigned to, select**None** from the drop-down menu.

Begin this campaign after

By default, the order in which campaigns in the link group will be activated is determined by the order those campaign were added to the group. You can redefine this order for the given campaign by selecting the preceding campaign from the drop-down menu. If the given campaign shall be processed first, select **none (1st)**.

Preview Options

Preview Options

Screenpop URL:

Start dialing first number
automatically: ☐

Start dialing after: [____] seconds

Use specific agent assignments for
records: ☐

Limit manual outbound calls to
numbers in lists and record manual call
results in campaigns: ☐

Preview options

Screenpop URL

Screenpop URL is the URL of the web page that will be displayed by the Agent Desktop application when the agent receives a preview record. Normally this is a web page that might contain further information about the calling record. A query string can be added to supply variables for the screen pop. See the group of variables *Outbound Target Work Item Parameters* in the *Scenario Builder Reference Guide*.

This parameter is optional. If it is not set, only the customer name and phone number to be dialed will be displayed in the contact panel of the Agent Desktop application.

Note that you can display information from calling records using Activity forms.

In addition, the specified web page will be displayed in the Context Information Area of Agent Desktop. This area is not shown when Agent Desktop is run minimized using the Pop-out function. Thus, when using URL screen pop, consider disabling agents' privilege *Force pop-out phone window*.

Screen-popping CRM URLs

When configuring the general properties of your preview campaign, you can enable specific Salesforce or Zendesk URLs to be screen-popped to the Agent Desktop.

For Salesforce Classic, Salescloud, and Lightning:

1. In the **Screenpop URL** field of Preview Options, enter the object ID (e.g., *$(workitem.otherInfo.SalesforceID)*).

2. Learn more about object ID and screen-pop configuration in the *Salesforce.com Integration Guide*.

For Zendesk:

1. In the **Screenpop URL** field of preview service, enter the ticket URL with the Zendesk ID (e.g., *tickets/$(workitem.otherInfo.ZendeskID)*).

2. Learn more about screen-pop configuration in the *Zendesk Integration Guide*.

Start dialing first number automatically

By default, agents dial numbers from list records manually. Select this checkbox if the first number of the list record shall be dialed automatically after the amount of time allocated for record preview (see option *Start dialing after*).

Start dialing after

Start dialing after is the amount of time allocated for list record preview. This parameter is essential only if option *Start dialing first number automatically* is enabled.

Use specific agent assignments for records

Records of the calling lists associated with the given campaign may be assigned to specific agents. If you select this option, any such records will be distributed only to the agents assigned to handle them. For more information, see the description of field type *Agent Login ID* in section [Lists](#).

Limit manual outbound calls to numbers in lists and record manual call results in campaigns

When enabled, this setting allows manually dialed phone numbers to be included in outbound or blended campaigns, should the phone number match one of the campaign's dialable phone numbers; click-to-call numbers are also included. Once included in a campaign, manually dialed calls will be counted toward related campaign metrics.

Additionally, when this setting is selected, the following applies:

- Calls adhere to [Do Not Call (DNC) lists](#) and [safe-calling hours](#)
- Calls count toward dial attempts
- [Dial rules by disposition](#) are allowed
- Calls on closed records are prevented

Note that this checkbox is unchecked by default and this setting is not currently available for use with hardphones.

Predictive Options

Predictive Options

No Answer timeout:	45 seconds
Scenario to run when answered:	13
Detect voice before connection:	☑
Detect answering machine:	☑
Wait for beep when detecting answering machine:	☑
Record CPA phase of call attempts:	☐
Unattended call timeout:	2 seconds
Maximum dropped calls (reporting threshold), %:	2

Dialer Aggressiveness

Target occupancy, %:	95
Initial Overdial Rate, %:	100 (100 % estimated success rate)

Reset statistics

Limit manual outbound calls to numbers in lists and record manual call results in campaigns:	☐

Predictive options

No Answer timeout

If the ring back tone is received, *No Answer timeout* specifies for how long the system shall wait for an answer before abandoning the call attempt with the disposition *No Answer*.

Scenario to run when answered

Scenario to run when answered indicates which scenario should be run upon answer. The *Default* scenario will provide a simple connect to the longest available agent while the calls that are not connected to agents within the specified *Unattended call timeout* (see below) will be terminated.

Bright Pattern Contact Center provides a scenario template called *Predictive Telemarketing Campaign* that serves as an example of how unattended calls can be treated in a compliant manner (according to the current FCC regulations).

Detect voice before connection

This indicates whether, upon answer, the system shall wait to detect voice before connecting this call to an agent. Deselect this checkbox if the calls should be connected to agents immediately upon answer.

Detect answering machine

Detect answering machine indicates whether upon voice detection the system shall try to distinguish live voice from an answering machine greeting or other prerecorded announcement. This setting is essential only if the *Detect voice before connection* setting is enabled (see above). Deselect this checkbox if the calls should be connected to agents immediately upon detection of a voice.

Wait for beep when detecting answering machine

This indicates whether the "announcement vs. answering machine" decision shall be based on detection of a beep sound after the speech segment. (If disabled, disposition *Announcement* will be used for all long speech messages.) It is essential only if the *Detect answering machine* setting is enabled (see above).

Record CPA phase of call attempts

Record CPA phase of call attempts indicates whether the Call Progress Analysis (CPA) phase of the campaign calls shall be recorded. Such recordings are stored in separate audio files and can be used to verify reaction of the system to various call attempt outcomes. CPA recordings can be checked using the [Quality Management playback function](#) and also [exported](#) for offline analysis.

This option is visible and available to you only if specifically activated for your contact center at the service provider level.

Unattended call timeout

Unattended call timeout specifies for how long, from the moment a call is answered by the called party, the default scenario will wait until terminating this call. Note that this setting only applies if the **<<Default scenario>>** is selected as the [scenario to run when answered](#).

If you apply any other scenario to process answered call attempts (i.e., select anything other than **<<Default scenario>>** as the scenario to run when answered), you should set the unattended call timeout as the last interval of the [Find Agent block](#) of the given scenario. You should also define the action applied to such unattended calls when the timeout expires as the conditional *Time Out* exit of the given block.

Bright Pattern Contact Center provides a [scenario template](#) called *Predictive Telemarketing Campaign* that serves as an example of how unattended calls can be treated in a compliant manner (according to the current FCC regulations). In this scenario template, the interval of the Find Agent block is set to 0-2 seconds and its *Time Out* conditional exit starts an IVR script that introduces the caller and provides the called party with an opt-out option.

Maximum dropped calls (reporting threshold), %

This setting is reserved for future use.

Dialer Aggressiveness

Target occupancy, %

This setting is used in Predictive mode only.

Target occupancy specifies the target occupancy for the agents participating in this campaign that will be used by the predictive algorithm to calculate the dialing frequency. Occupancy is defined as the time spent handling calls relative to the time total working time--that is, *(Busy Time + ACW Time) / (Busy Time + ACW Time + Ready Time) * 100*.

Changes in the target occupancy of a running campaign will take effect immediately. Such changes may be necessary in order to observe compliance with the telemarketing law for maximum percentage of unattended calls (also known as *abandonment rate*). The percentage of unattended calls can be monitored in real time (see section General Campaign Metrics View of the *Supervisor Guide*) and/or historically (see section Telemarketing Compliance Report of the *Reporting Reference Guide*).

Initial Overdial Rate, %

This setting is used in Predictive mode only.

Initial Overdial Rate, % specifies the percentage of call attempts that will be made for this campaign relative to call attempts that are expected to be answered. This configured value will determine the dialing frequency at the start of this campaign. For example, if you expect only every second attempt to be successful, you can set the initial overdial rate to 200%, and the system will initially make twice as many call attempts as there are agents in the *Ready* state.

Note that this setting is an inversion of the *Estimated Success Rate* (ESR), which was used in the product prior to Bright Pattern Contact Center version 3.10 for the same purpose. The ESR is defined as the expected percentage of call attempts that will be answered relative to all call attempts that will be made for this campaign; thus, if you upgrade from a previous version of Bright Pattern Contact Center and the ESR for a particular campaign was set to 50%, you will see the *Initial Overdial Rate* for this campaign set to 200%. (The ESR is displayed as a read-only value next to it.)

Once the system has accumulated enough statistics for dial frequency prediction, the configured Initial Overdial Rate value will be replaced with the actual overdial rate calculated and constantly updated in real time.

You can reset statistics used in calculation of the actual success rate and reapply the configured Initial Overdial Rate value at any time during campaign operation by clicking the **Reset statistics** button.

Limit manual outbound calls to numbers in lists and record manual call results in campaigns

When enabled, this setting allows manually dialed phone numbers to be included in outbound or blended campaigns, should the phone number match one of the campaign's dialable phone numbers; click-to-call numbers are also included. Once included in a campaign, manually dialed calls will be counted toward related campaign metrics.

Additionally, when this setting is selected, the following applies:

- Calls adhere to [Do Not Call (DNC) lists](#) and [safe-calling hours](#)
- Calls count toward dial attempts
- [Dial rules by disposition](#) are allowed
- Calls on closed records are prevented

Note that this checkbox is unchecked by default and this setting is not currently available for use with hardphones.

Progressive Options

Progressive options

No Answer timeout

If the ring back tone is received, *No Answer timeout* specifies for how long the system shall wait for an answer before abandoning the call attempt with the disposition *No Answer*.

Scenario to run when answered

Scenario to run when answered indicates which scenario should be run upon answer. The *Default* scenario will provide a simple connect to the longest available agent while the calls that are not connected to agents within the specified *Unattended call timeout* (see below) will be terminated.

Bright Pattern Contact Center provides a scenario template called *Predictive Telemarketing Campaign* that serves as an example of how unattended calls can be treated in a compliant manner (according to the current FCC regulations).

Detect voice before connection

This indicates whether, upon answer, the system shall wait to detect voice before connecting this call to an agent. Deselect this checkbox if the calls should be connected to agents immediately upon answer.

Detect answering machine

Detect answering machine indicates whether upon voice detection the system shall try to distinguish live voice from an answering machine greeting or other prerecorded announcement. This setting is essential only if the *Detect voice before connection* setting is enabled (see above). Deselect this checkbox if the calls should be connected to agents immediately upon detection of a voice.

Wait for beep when detecting answering machine

This indicates whether the "announcement vs. answering machine" decision shall be based on detection of a beep sound after the speech segment. (If disabled, disposition *Announcement* will be used for all long speech messages.) It is essential only if the *Detect answering machine* setting is enabled (see above).

Record CPA phase of call attempts

Record CPA phase of call attempts indicates whether the Call Progress Analysis (CPA) phase of the campaign calls shall be recorded. Such recordings are stored in separate audio files and can be used to verify reaction of the system to various call attempt outcomes. CPA recordings can be checked using the [Quality Management playback function](#) and also [exported](#) for offline analysis.

This option is visible and available to you only if specifically activated for your contact center at the service provider level.

Unattended call timeout

Unattended call timeout specifies for how long, from the moment a call is answered by the called party, the [Find Agent block](#) of the applied scenario (see *Scenario to run when answered* above) will wait for an available agent before processing it in the manner defined by the conditional exit *Time Out*.

Note that the *Default* scenario will terminate such calls.

Bright Pattern Contact Center provides a [scenario template](#) called *Predictive Telemarketing Campaign* that serves as an example of how unattended calls can be treated in a compliant manner (according to the current FCC regulations).

Maximum dropped calls (reporting threshold), %

Enter the maximum percentage of allowable dropped calls.

Progressive Power Dialing

Overdial Rate, %

This setting is used in Progressive mode only.

Overdial Rate, % specifies the percentage of call attempts that will be made for this campaign relative to call attempts that are expected to be answered. This configured value will determine dialing frequency for the duration of the campaign. For example, if you expect only every second attempt to be successful, you can set the initial overdial rate to 200%, and the system will make twice as many call attempts as there are agents in the *Ready* state.

Setting the Overdial Rate to 100% (default) practically means that for any answered call, there will be an agent available to accept it.

Limit manual outbound calls to numbers in lists and record manual call results in campaigns

When enabled, this setting allows manually dialed phone numbers to be included in outbound or blended campaigns, should the phone number match one of the campaign's dialable phone numbers; click-to-call numbers are also included. Once included in a campaign, manually dialed calls will be counted toward related campaign metrics.

Additionally, when this setting is selected, the following applies:

- Calls adhere to [Do Not Call (DNC) lists](#) and [safe-calling hours](#)
- Calls count toward dial attempts

- [Dial rules by disposition](#) are allowed
- Calls on closed records are prevented

Note that this checkbox is unchecked by default and this setting is not currently available for use with hardphones.

Automatic (IVR) options

Automatic IVR options

Max concurrent calls

This option specifies how many calls can be in progress simultaneously.

No Answer timeout

If the ring back tone is received, *No Answer timeout* specifies for how long the system shall wait for an answer before abandoning the call attempt with disposition *No Answer*.

Scenario to run when answered

Scenario to run when answered indicates which scenario should be run upon answer. Note that for Automatic (IVR) mode, the scenario containing a recorded IVR message should be explicitly defined.

Detect voice before connection

This option indicates whether upon answer the system shall wait to detect a voice before connecting this call to an agent. Deselect this checkbox if the calls should be connected to agents immediately upon answer.

Detect answering machine

Detect answering machine indicates whether, upon voice detection, the system shall try to distinguish the voice from an answering machine greeting. It is essential only if the *Detect voice before connection* setting is enabled (see above). Deselect this checkbox if the calls should be connected to agents immediately upon detection of a voice.

Wait for beep when detecting answering machine

This option indicates whether the "announcement vs. answering machine" decision shall be based on detection of a beep sound after the speech segment. (If disabled, the disposition *Announcement* will be used for all long speech messages.) It is essential only if the *Detect answering machine* setting is enabled (see above).

Record CPA phase of call attempts

Record CPA phase of call attempts indicates whether the Call Progress Analysis (CPA) phase of the campaign calls shall be recorded. Such recordings are stored in separate audio files and can be used to verify the reaction of the system to various call attempt outcomes. CPA recordings can be checked using the [Quality Management playback function](#) and also [exported](#) for off-line analysis.

This option is visible and available to you only if specifically activated for your contact center at the service provider level.

Limit manual outbound calls to numbers in lists and record manual call results in campaigns

When enabled, this setting allows manually dialed phone numbers to be included in outbound or blended campaigns, should the phone number match one of the campaign's dialable phone numbers; click-to-call numbers are also included. Once included in a campaign, manually dialed calls will be counted toward related campaign metrics.

Additionally, when this setting is selected, the following applies:

- Calls adhere to [Do Not Call (DNC) lists](#) and [safe-calling hours](#)
- Calls count toward dial attempts
- [Dial rules by disposition](#) are allowed
- Calls on closed records are prevented

Note that this checkbox is unchecked by default and this setting is not currently available for use with hardphones.

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 of system 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.

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's softphone. 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).
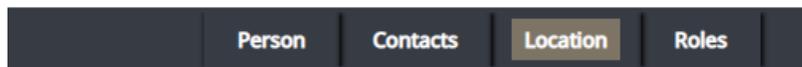
Email address

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

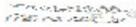The state or province in which the user works (e.g., "CA"). This property is optional.

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
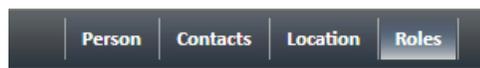
IP address (public)

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

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 of system 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.

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

| Person | Contacts | Location | Roles |

Chat nickname: [   ]

Rank: [   ]

Phone extension: [1004   ]

Forward all calls for ext. 1004: ☐

to: [   ]

Forward on no answer after: [   ] seconds

Default hardphone number: [   ]

Enable voicemail: ☐

Send to voicemail after: [   ] seconds

Use this greeting for voicemail:
○ << Not set >>
○ << Not set >>
○ << Not set >>

Work phone: [   ]

Mobile phone: [   ]

PIN code for phone login: [   ]

Email address: [   ]

powered by Bright Pattern

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's softphone. 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).
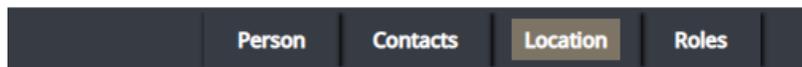
Email address

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

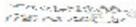The state or province in which the user works (e.g., "CA"). This property is optional.

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
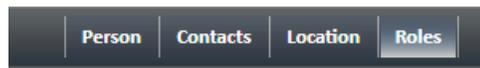
IP address (public)

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.

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.
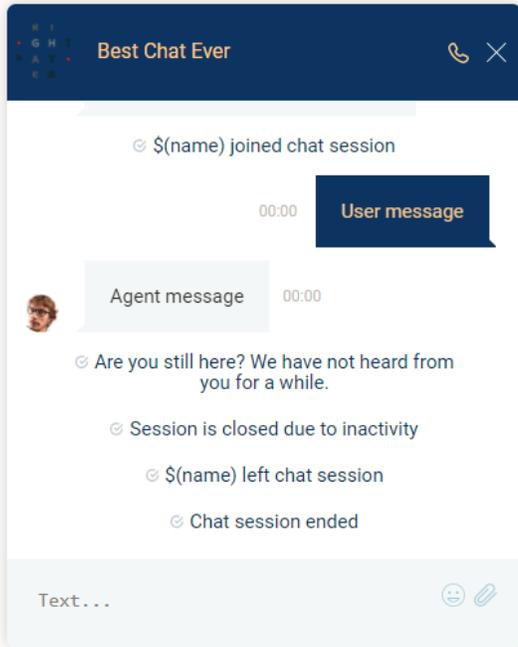
Example of a customized chat widget

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.

Known Issues and Workarounds

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

Reports do not display properly in Firefox 67

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

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

1. In Firefox, navigate to **about:config** to bring up preferences.

2. Search for preference **security.webauth.u2f**

3. Set the value to false by double-clicking on the preference.

Embedded Agent Desktop Widget in Safari

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

Externally Linked Images in Jaspersoft Reports

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

MongoDB Performance

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

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

Workaround for Integration With Multiple Salesforce Accounts

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

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

Should you experience this issue, take the following steps:

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

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

Windows Administrative Remote Assist Task Manager

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

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

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

To work around this issue:

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