What's New

Bright Pattern Documentation

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About

What’s New describes the features and enhancements that have been added in the current version of Bright Pattern Contact Center. Additionally, this guide contains previous Bright Pattern Contact Center release notes starting from version 5.2.0.

The current version of Bright Pattern Contact Center is 5.3.5.

Audience

This guide is intended for personnel responsible for contact center operations, supervisors, and agents.

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.

Version 5.3.6

Bright Pattern Contact Center version 5.3.6 is a minor release.

Note: If you are upgrading to this version from a previous release, be sure to review the prior release notes for any versions you may have skipped past, as these release notes include important information about features, defects, and upgrade notes for each specific version.

Changes in System Behavior

This section describes changes in system behavior for this release.

“Listen to call recordings and view chat transcripts on assigned services” Privilege
Starting from this release, the user privilege *Listen to call recordings and view chat transcripts on assigned services* will no longer require a supervisor license.

## Added/Updated Features

The following features have been added or updated for this release.

### Desktop JavaScript API and Embedded Agent Desktop API Changes

`setRescheduleWindow` is a new method that has been added to the Desktop JavaScript API and the Embedded Agent Desktop API. `setRescheduleWindow` allows you to reschedule outbound dialing retry time to be within a specific timeframe with the option to specify a time zone.

The `postVariable` method has been updated in the Desktop JavaScript API and the Embedded Agent Desktop API. `postVariable` now can be used to set activity history to service/campaign results.

### Expanded Scheduled Reports Parameters

In the Contact Center Administrator application, section Report Templates, when scheduling hourly reports, the following options are added to the Time Frame reports parameter: *Today* and *This Week*. The new options allow hourly reports to generate data for the period of “today” or “this week” at the Repeat Every setting's interval. Note that in Bright Pattern Contact Center version 5.2.x, it was possible to configure a Daily Report to run every 15 minutes and include data for Today; the new parameters make it possible to generate similar reports.

### Email Queue Scalability

Version 5.3.6 includes performance improvements in queue handling that allow you to have more emails in storage and in the push queue.

## Known Issues

For more information about known issues for Bright Pattern Contact Center, please see [Known Issues and Workarounds](#).

## Version 5.3.5

Bright Pattern Contact Center version 5.3.5 is a minor release with the following new features.

**Note:** If you are upgrading to this version from a previous release, be sure to review the prior release notes for any versions you may have skipped past, as these release notes include important information about features for each specific version.

### Features and Notes

Simplified Desktop .NET API Extensions

The following methods have been added to the Simplified Desktop .NET API:

- Method `CallSetScenarioVariable` can be used to set a scenario variable from the desktop.
- Method `CallSStepTransfer` can be used to initiate a single-step (blind) transfer of the current call to a specified destination.

Scenario Functions for Credit Card Validation

To support over-IVR payment solutions, the following scenario functions have been implemented in this release:

- `validateCCExpirationDate` - Checks the length and range of the entered expiration date
- `validateCCV` - Checks the length of the entered CCV
- `validatePAN` - Checks the length of the entered card number and, if applicable, applies the Luhn check

Encryption Settings Menu Relocation

In the Contact Center Administrator application menu, section Encryption Settings was moved from under the Quality Management section header to under the Security section header.

Added Chat Widget Styling Options

The following options are added to the Chat Widget Styling editor:

- 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.
- 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 (i.e., it must be disabled if the emoji selector is to be removed).
- The editable field Required Field text lets administrators configure the message that appears when required fields are not filled out. Note that this feature was implemented in version 5.3.4.
- The editable field Refers to Required Fields text lets administrators configure the message that appears when referring to required fields. Note that this feature was implemented in version 5.3.4.

For more information, see the Chat Widget Configuration Guide, section Chat Widget Styling.

New Proactive Offer Conditions

The following conditions are added to the Proactive Offer chat widget: Estimated wait time, below and Non-mobile browser.

The condition Estimated wait time, below allows administrators to show the proactive offer only when the expected time in the queue for customers would be less than the configured amount of time.

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

For more information, see the Chat Widget Styling Guide, section Proactive Offer.

Maximum Concurrent Chats Per User

The setting Maximum concurrent chats is added to the Contact Center Administrator application, section Users. When configured, this option lets administrators define the total number of concurrent chats an agent will process at a given time.
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%). We will be addressing this in upcoming releases.

For more information, see the Contact Center Administrator Guide, section Users.

Pre-Chat Form Data Validation

In pre-chat forms, the data entered in the following field types will be automatically validated: phone number, callback phone number, email, or date; the data must be entered in the specified format before the form is accepted. Note that the validation functions are intended only to check that the entered data is entered in the correct format. That is, the functions are not expected to verify whether mailboxes, domains, or phone numbers actually exist, nor to modify the valid entered data in any way.

For more information, see the Chat Widget Styling Guide, section Working with Form Fields.

Co-browsing Indicator Variable for Reporting

The scenario variable $(item.coBrowsing) may be used to determine if a co-browsing session was requested by the chat client. The variable may be added to custom reporting fields in scenarios.

For more information, see the Scenario Builder Reference Guide, section Variables.

Co-browsing Configuration Note

For customers upgrading to version 5.3.5 who configured chat per the full chat code on older versions of Bright Pattern Contact Center:

If the togetherJS_enabled variable was used to enable co-browsing, after you upgrade, the Chat Widget Styling option Enable cobrowsing 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.

Text Labels for Co-browse and Exit Icons

In the chat widget, tooltips containing text labels are added for the Co-browsing and Exit icons, which allows customers to see the names of the icons on mouseover.

Extended Knowledge Base Variable Functionality

The Knowledge Base answer variable $(from.name) is expanded to include chat interactions. That is, when this variable is used in Knowledge Base articles, the variable will populate with the name entered in pre-chat forms.

For more information, see the Contact Center Administrator Guide, section Knowledge Base.

CC/BCC Viewable in “Show Original Email Content”

When agents send outgoing emails that include CC or BCC fields, it is possible to see the email addresses from these fields when the Show original email content button is selected.

Version 5.3.4
Bright Pattern Contact Center version 5.3.4 is a minor release; please note the following.

If you are upgrading to this version from a previous release, be sure to review the features from any versions you may have skipped past, as these release notes include important information about features specific to each version.

**Viewing Reports in Firefox**

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. Bright Pattern plans on addressing this issue in a future release. Until this time, we recommend the following workaround:

1. In Firefox, navigate to `about:config`. That brings up a list of preferences.

2. Search for preference `security.webauth.u2f`, and set the value to `false` by double-clicking on the preference.

**Call Recording Notification Changes**

Prior to release 5.3, when an agent manually stopped call recording, both parties on the call (i.e., the customer and the agent) would hear a beep notifying them that the recording was stopped. There was no notification when recording was manually resumed. In release 5.3, configurable notifications have been introduced for manual stop and start of call recording. By default, no notifications are sent to either party—neither for stop nor for start. This change was made without preserving the existing behavior. Thus, after upgrading to 5.3, no notification is sent when recording is manually stopped. To restore the pre-upgrade behavior, you need to select the to agent and to customer checkboxes for the option **Play notification when recording stops** in the Contact Center Administrator application, section **Quality Management > Call Recording and Monitoring**.

**“Repeat Every” Property in Scheduled Reports**
Prior to version 5.3.4, the scheduled reports property Repeat every was available with hourly and daily recurrence, which caused an overlap in scheduled report configuration options. Starting from version 5.3.4, this property is available for scheduled reports with hourly recurrence only. The previously scheduled reports are automatically migrated to the new settings. Thus, if you had scheduled reports with daily recurrence that are set to repeat more frequently than hourly and you are missing the option to set Repeat every, check it under hourly reports.

“Required” Checkbox in Activity Forms

Before version 5.3.0, even if an activity form field had the property Required checked, the agent was still able to complete an interaction without filling out the field. Starting from version 5.3.0, interaction processing cannot be completed until all required fields of the form are filled out.

Version 5.3.3

Bright Pattern Contact Center version 5.3.3 is a minor release; please note the following.

Wallboard Application Hard Refresh

Depending on how your Wallboard application is started, after upgrading to this version, you may not be able to access wallboards or see any data in them. In this case, you will need to do a hard refresh of the given browser page, after which the application should start normally.

Set Agent State Block Change

Starting from this version, in the Scenario Builder application, the Set Agent State block's action GET_STATE has been deprecated. Its functionality is now provided via the dedicated Get Agent State scenario block. If you have any questions about this particular change, please contact the Customer Success team directly at +1 855 631 4553.

Incoming Callback Reservation Notification

In call centers utilizing the Virtual Queue callback feature, Agent Desktop now pops a reservation notification to agents, which informs them they have been reserved for a callback. The notification includes a checkbox option to not show the notification in the future.

For more information, see Virtual Queue Tutorial, section Overview.

Version 5.3.2

Bright Pattern Contact Center version 5.3.2 is a minor release; please note the following.

“My Subteam Only” Checkbox in the Wallboard’s Agent Grid Widget
When upgrading to version 5.3.2, if the “My Subteams Only” checkbox in the Wallboard’s Agent Grid widget was previously checked, you may need to uncheck it in order for your widget to show data (i.e., general agent data and not data related to your subteams).

**Proactive Offer Chat Widget Sizing Treatment**

Please note that in release 5.3.0 the Proactive Offer chat widget sizing treatment was changed. Previously, contact buttons were placed outside of the offer area, which caused layout issues. Starting with release 5.3.0, the buttons are inside the widget. We advise all customers who used Proactive Offers before version 5.3.0 to review and adjust the sizing of the widget dialog and possibly add line breaks to separate widget content from the buttons.

**Select Disposition Control for Chat**

Version 5.3.2 relocates the chat disposition preselection button placement from next to the disposition name into to the selection of chat controls. The disposition selection control allows you to disposition a chat before the chat is completed; however, this disposition may be changed before the chat is completed. For more information, see the Agent Guide, section Chat Controls.

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**Version 5.3.1**

See what's new for Bright Pattern Contact Center version 5.3.1.

**Email Reply and Forward Buttons in Agent Desktop**

In the Agent Desktop application, for email cases with all states except Closed, the Reply and Forward buttons are accessible at the top and bottom of a message; the top buttons will show on cursor hover and the bottom buttons will always display.

For more information, see the Agent Guide, section How to Compose a Reply.

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**Version 5.3.0**

Bright Pattern Contact Center version 5.3 adds a number of new features and enhancements, including advanced search capabilities, Conversational IVR, and Microsoft Dynamics 365 integration.

Keep reading to learn more about what’s new in version 5.3.

**Agent Desktop Performance**

Keep Agent Desktop Awake
Previously, when the agent’s computer went to sleep mode due to inactivity, the OS would shut down the Internet connection causing the Agent Desktop to log out the user automatically due to connection loss. This negatively affected users' productivity and KPIs. Starting with this release, the Agent Desktop application with a logged-in user will prevent the computer from going into Sleep mode by the inactivity timeout.

This feature does not affect the user’s ability to put the computer in Sleep mode manually (e.g., via the Power menu option or by closing the laptop lid).

Note that the auto-logout prevention behavior is unconditional and applies to computers on both Windows and Mac OS.

**Safari Browser Extension For Agent Desktop Helper Application**

To address the Safari web browser’s dropped support for NPAPI in Safari 12, Bright Pattern has implemented the Safari App Extension, which is supported for Agent Desktop users on Safari 10, 11, and 12 on Mac OS X 10.12 (Sierra) and higher.

The Safari App Extension will be packaged into the Agent Desktop Helper Application (i.e., the BPClientSetup.exe installer); the installer will detect the OS X version the system is running at and install the extension only if it runs on Mac OS 10.12 and later.

For more information, see the Contact Center Administrator Guide, section Agent Desktop Helper Application.

**Agent Desktop UI**

**Bright Pattern SSO**

Bright Pattern now offers single sign-on (SSO) functionality for our contact center platform. SSO allows users to sign in just one time for access to Agent Desktop, Wallboard, and Contact Center Administrator applications.

**Home Page**

The Agent Desktop section My Grades is renamed Home Page.

**Search & Preview Records**

The Agent Desktop section Contacts is renamed Search & Preview Records.

**Non-Trivial Totals for Supervisor Statistics**

In the Agent Desktop application, section Supervision, metrics displayed in the Service Metrics area are no longer always presented as the sum in the totals bar. For example, the totals bar will display the total number of interactions for metric IN Waiting, but the IN Max Wait metric total will display the service with the maximum amount of wait time.

For more information about real-time metrics, see the Supervisor Guide.

**AI and Bots**

**Conversational IVR**

Bright Pattern’s Conversational IVR is an interactive voice response (IVR) solution that leverages integrated chatbots and speech recognition technologies for self-service. Unlike traditional IVRs that prompt callers to select from menu options, Conversational IVR lets customers choose the path they prefer by simply saying what they want. Callers can interact naturally in their own words, eliminating the need to memorize options.
Powered by integrations with Amazon, Google, GoVivace, and IBM, conversational IVR utilizes speech-to-text (STT) technology, text-to-speech (TTS) technology, Natural Language Processing, and Natural Language Understanding to learn about customer behavior, collect data, and deliver insights based on what customers say. Using collected data, the conversational IVR can learn and be improved and updated continually through the voice of the customer.

Conversational IVR can be configured in scenarios using the new Play-Listen scenario block. For more information, see the Scenario Builder Reference Guide, section Play-Listen.

APIs

Multichannel Recording API

Version 5.3 allows you to record voice of each participating party on a call into a separate audio file and export these files in uncompressed format via an API. Note that this function requires extra storage and must be enabled for you by your service provider.

For more information, see the Interaction Content API.

Interaction Content API Method Extensions

The Get File and Get Metadata API methods allow you to download recording files in the original stored format (GSM) without converting them to PCM format.

To use the API methods, you need to have the “Allow recording export API access” privilege.

Note that the Interaction Content API was previously called the Recording Retrieval API.

SMS/MMS API

The SMS/MMS API allows for the sending of SMS/MMS messages via text-capable access numbers of the Bright Pattern platform from an external application and tracking the delivery status of those messages. Possible replies can be directed to a chat service associated with the assigned access number.

For more information, see the Contact Center Administrator Guide, section Privileges and the SMS/MMS API Specification.

Call Center Configuration

Configurable Notifications for the Start and Stop of Call Recordings

Version 5.3 presents the options Play notification when recording starts and Play notification when recording stops in the Contact Center Administrator application, section Quality Management > Call Recording and Monitoring.

These individually configurable options allow you to choose whether notifications play at the beginning and/or end of recorded calls. Additionally, you may configure whether a prompt is played to an agent, a customer, or both. Note that separate tones or pre-recorded prompts may be uploaded for either of the configurable options.

For more information, see the Contact Center Administrator Guide.

Grayscale Screen Recordings

Administrators can now specify Agent Desktop screen recordings to be saved in grayscale rather than color, which results in significant bandwidth savings. This option is set in Screen Recording properties in Contact Center Administrator.
Individual Volume Controls for Ringtone and Notifications

*Ringtones and Alerts* has been added to the available selection of Agent Desktop's user settings. From this setting, users can change the volume of the ringtone as well as the tone of external chat and preview record notifications.

For more information, see the *Agent Guide*, section *Ringtones and Alerts*.

System-Level Volume Controls for Ringtones and Notifications

Volume slider controls have been added to the Contact Center Administration application, section *Call Center Configuration > Audio Treatments*, making it easier to adjust the volume of ringtones and notifications in your call center.

For more information, see the *Contact Center Administrator Guide*.

Case and Contact Management

Advanced Case and Contact Search

Version 5.3 expands full-text search capabilities to include email bodies in the Agent Desktop application, section *Search & Preview Records* (formerly known as Contacts). This is made possible through the implementation of Elasticsearch, a leading edge search engine that quick searches on powerful and flexible criteria.

When enabled, agents may do the following:

- Make partial word searches
- Make multi-word searches (e.g., an email's subject line or a complete sentence)
- Use robust advanced search criteria options (e.g., flagged cases can be found by entering the search `flagged: yes|no`)
- Conduct searches that include both case and contact information (e.g., searches can display cases based on their email contact matches)
- Conduct searches that are a mix of text and non-text criteria (e.g., find cases with an “Open” state that were opened more than seven days ago by entering the search `modified > MM/DD/YY AND Open`)

For user information, including expanded search options, see the *Agent Guide*, section *Advanced Search*.

Expanded Case Management Settings and Case State

Version 5.3 expands case features to allow better organization of your contact center's personal and team queues; features include new management settings and case states.

Case states in the Agent Desktop application are expanded to allow a variety of customizable choices; these states include the following: *New, Open, Pending, Resolved*, and *Closed*

The Contact Center Administrator application contains the following additions to section Case & Contact Management:

- **Resolved case becomes closed after**
  - *Resolved* is one of the new states available for Agent Desktop cases. For this setting, if a case has been categorized as Resolved, it will be automatically closed after a specified number of days; the default number of days is 14.

- **Setting final disposition resolves case**
  - For this setting, selecting the disposition on a case to any option in the *Final* category will resolve the case.
• **Case Pending Reasons**
  - *Pending* is one of the new states available for Agent Desktop cases. This section is where you create the *Pending* reasons for cases that require further action (e.g., needing manager approval, more customer information, etc.).

For more configuration information, see the *Contact Center Administrator Guide*, section *Case Pending Reasons* and section *General Settings*. For more information regarding case state, see the *Agent Guide*, section *Case State*.

**Creating Cases Outside of Interactions**

It is possible for agents to create a case for a saved contact without an interaction. The *Add a case* button, found in Search & Preview Records, *Contacts* tab, creates a new case with the “add note” field open and the option to send an email. When a case is created in this way, it puts the creating agent in a Busy state.

For more information, see the *Agent Guide*, section *How to Create New Cases*.

**Creating Follow-Up Cases from Closed Cases**

Version 5.3 introduces the *Create follow-up case* button for closed cases. While there is no way to reopen a closed case, it is possible to create a new “follow up” case, instead.

For more information, see the *Agent Guide*, section *How to Send a Follow-Up Outbound Email*.

**Link Button for Easy Access and Collaboration on Cases and Contacts**

Version 5.3 introduces the link button for cases and contacts. Clicking this button copies a direct access URL to the specific case or contact, which can be shared with the other agents or supervisors of your contact center.

For more information, see the *Agent Guide*, section *My Cases Interface* and section *Search & Preview Records Interface*.

**Chat**

**Proactive Offer Chat Widget Sizing Treatment**

Please note that in release 5.3.0 the *Proactive Offer chat widget* sizing treatment was changed. Previously, contact buttons were placed outside of the offer area, which caused layout issues. Starting with release 5.3.0, the buttons are inside the widget. We advise all customers who used Proactive Offers before version 5.3.0 to review and adjust the sizing of the widget dialog and possibly add line breaks to separate widget content from the buttons.

**Documentation**

Bright Pattern Contact Center help documentation has been redesigned and reorganized to make it easier to find information.

**Bright Pattern Contact Center Docs Home**

The documentation home page offers visual cards organized by topic: Agents, Administration, Supervisors, What’s New, Tutorials, Reporting, API Reference, Integrations, Support, and FAQ.

Cards contain drop-down menus with easy-to-navigate links. See the new look of Bright Pattern Contact Center Docs at [help.brightpattern.com](http://help.brightpattern.com).

**Tutorials**
We provide tutorials for every type of user: agent, administrator, and supervisor. To accommodate new how-to articles, we have reorganized the Agent Guide, Contact Center Administrator Guide, and Scenario Builder Reference Guide.

The Agent Guide focuses on topics related to agent experience (i.e., setup, working in Agent Desktop, tutorials, and troubleshooting).

The Contact Center Administrator Guide is now supplemented by Tutorials for Admins, which presents a wide range of “how-to” material for administrators configuring contact centers. Topics include AI and bots, integrations, scenarios, services, and so forth.

The Scenario Builder Reference Guide includes new chat and voice scenario exercises, which utilize annotated templates that can be downloaded and imported into a contact center for training purposes.

New Guides

The Embedded Agent Desktop SDK Specification includes a detailed description of the API used to embed the Agent Desktop widget into webpages to support requests for information about agent states and interactions, as well as control agent and supervisor login, status, call flow, call recordings, transfers, and outbound dialing.

The Microsoft Dynamics 365 Integration Guide provides integration configuration procedures and explains how to enable access to Microsoft’s Web API in order to access Dynamics 365 data from Bright Pattern scenarios.

Doc Archives

Help documentation for Bright Pattern Contact Center version 3.x has its own dedicated space: help3x.brightpattern.com.

Email

Customizable Disposition Buttons for Email

New for email services, dispositions may be configured as buttons that appear in the toolbar of both team queue and personal queue in Agent Desktop's My Cases; these buttons allow agents to quickly disposition emails and remove them from the queue.

Disposition buttons are configured in the Contact Center Administrator application, section Services & Campaigns > Dispositions Tab, with the new settings Show in toolbar in team queue and Toolbar icon.

For more information, see the Contact Center Administrator Guide, section Dispositions Tab.

Option to Suppress Thread ID in Email Subject Line

The option Insert thread id in email subject is added to the Contact Center Administrator application, section Scenario Entries > Email > Services tab. When disabled, an email case's thread ID will be removed from the email's subject line. Note that this setting is automatically enabled for existing email entries; if you are creating a new scenario entry for email, this setting is not enabled.

For more information, see the Contact Center Administrator Guide, section Email.

Post-Transactional Email Surveys

Version 5.3 lets you send post-transaction surveys to your customers via email. Our customizable HTML survey forms can be tailored to any service for any language and can be sent automatically to the customer based on the interaction's disposition.
The customer receives the email with a link to the online survey, completes the survey, and gets an auto-generated “thank you” response. Conveniently, the customer's survey data are saved to Activities and attached to the associated case.

Survey forms are configured in the Survey Form Editor application, which is accessible through the Contact Center Administrator application, section Quality Management > Survey Forms. Survey forms may be sent through the Workflow Builder application or the Scenario Builder application, when configured in an EMail block. Note that the Survey Form Editor is part of Bright Pattern Contact Center quality management features, is enabled per tenant.

For more information, see the Contact Center Administrator Guide, as well as the Workflow Builder Reference Guide, section [5.3:Workflow-builder-reference-guide/HowtoSolicitPost-TransactionalSurveysviaEmail|How to Solicit Post-Transactional Surveys via Email].

Forms

Activity History Forms Display Custom Fields

Version 5.3 introduces Activity History forms. Activity History forms pull information from the activity forms agents fill out during interactions. This information is then saved to the case and contact history corresponding to the interaction and is accessible in Agent Desktop's section Search & Preview Records (formerly Contacts).

When configuring Activity History forms, note that they are defined per service type (i.e., chat, email, voice). Additionally, they may include custom Activity History fields.

For more information, see the Contact Center Administrator Guide, section Activity History Forms, and the Form Builder Reference Guide, section How to Configure Activity History Forms.

Clone Pages of Activity Forms

The clone button has been added to the Form Builder application for activity forms; the button is located next to the add page button in the pages palette.

Clicking clone creates a new page titled "Clone of <page name>" and all controls are copied from the cloning page. Additionally, you can change the default page name when creating a new page by clicking the green + button. After clicking this, the page name should read "Page 2", "Page 3," and so forth, instead of "New Page".

For more information, see the Form Builder Reference Guide, section How to Configure Activity Forms.

Integrations

Microsoft Dynamics 365 Integration

Bright Pattern Contact Center now integrates with Microsoft Dynamics 365 applications to provide single sign-on, Dynamics 365 data-driven interaction routing, screen-pop, activity history, and click-to-call functions.

This integration adds new scenario blocks: Microsoft Dynamics Create Object, Microsoft Dynamics Delete Object, Microsoft Dynamics Screen Pop, Microsoft Dynamics Search Object, Microsoft Dynamics Select Account, and Microsoft Dynamics Update Object.

For more information, see the Microsoft Dynamics 365 Integration Guide and the Scenario Builder Reference Guide.

New Authentication for IBM Watson Assistant
Watson Assistant has been added as a bot/chat suggestions engine integration type because IBM Watson no longer supports username/password authentication for their newer generation of services.

Watson Conversation integration has been renamed Watson Assistant (Conversation) in order to support backward compatibility.

For more information, see the Contact Center Administrator Guide, section Bot / Chat Suggestions Engine Integration.

Screen Recorder Stores Directly to Amazon AWS

Release 5.3 provides two options for screen recordings storage: local storage and Amazon AWS.

Local storage is the default. When Amazon AWS storage is selected, screen recordings will be uploaded directly to your S3 bucket. You can specify exactly where (i.e., to which S3 bucket) such recordings will be stored in AWS integration account properties.

AWS integration account properties now include property “Region” for specifying the geographical region where Amazon S3 will store your buckets.

For more information, see the Contact Center Administrator Guide.

Single Sign-On with Google G Suite Apps

Bright Pattern integrates with Security Assertion Markup Language (SAML) 2.0 identity providers, allowing you to configure single sign-on (SSO) functionality for Agent Desktop and Contact Center Administrator.

We've implemented SSO with Google G Suite applications (e.g., Gmail, Google Docs, Google Drive, etc.), so you can sign in just once to access all your apps.

For SSO configuration steps, see the SAML 2.0 Single Sign-On Integration Guide.

Reporting

Expanded Agent Selection Features in Agent Reports

The following features have been extended to the following reports:

Features

- The ability to select multiple agents
- The select all checkbox
- The checkbox to show/hide disabled or deleted agents
- Perform incremental searches by partial name

Affected reports

- Agent Activity
- Agent Activity (CSV)
- Agent Email
- Agent Performance

For more information, see the Reporting Reference Guide, section Report Generation.

New Time Frame Report Parameters
To support the ISO week definition, where the first day of the week is Monday, the new time frame reporting parameters *Last Week (Monday - Sunday)* and *This Week (since Monday)* have been added to ad-hoc reports, scheduled reports, and Agent Timeline.

For more information about generating reports, see the *Reporting Reference Guide*.

**Reporting Data for Agent City and Country**

The new fields `agent_country` and `agent_city` have been added to both the `agent_activity` table and `agent_performance` table. These fields display the country and city listed per user in *Users > Location tab* and enable grouping of agents in reports by location.

For more information, see the *Reporting Database Specification*.

**Scheduled Reports UI Changes**

Version 5.3 introduces various changes to the sections of the Contact Center Administrator application dedicated to reporting.

Section Reporting > Report Templates now includes the *Used In* tab, where users may see what reports a report template is associated with, create and customize a new report from the template, schedule report generation and delivery, and delete reports.

Section Reports introduces updates to the user interface, including report generation buttons. For original, unmodified reports, the buttons are renamed *Customize*, 'Rename', and *Clone*; for cloned reports, the *Delete* button is included. Note that it will be possible to delete cloned reports only.

For more information see the *Contact Center Administrator Guide*, section *Report Templates*, and the Reporting Reference Guide, section *Report Generation*.

**Scenarios and Workflows**

**Bright Pattern Case and Contact Management Workflow Blocks**

The *Bright Pattern Create Object* and the *Bright Pattern Update Object* blocks have been added to the Workflow application.

The Bright Pattern Create Object block allows objects to be created in the Bright Pattern Contact Center database, and the Bright Pattern Update Object block allows existing database objects to be modified. Object types include case, contact, company, and activity history (for Bright Pattern Create Object only).

For more information, see the *Workflow Builder Reference Guide*.

**Enhanced Bright Pattern Search Object Block**

The Scenario Builder application's enhanced Bright Pattern Search Object block allows you to add multiple search conditions within a single block, and expands the searchable *Case* object type to include *Reporter Id* and *State*.

For more information, see the *Scenario Builder Reference Guide*, section *Bright Pattern Search Object*.

**Play-Listen Scenario Block**
Version 5.3 introduces the Play-Listen scenario block, a key part of Bright Pattern's conversational IVR. It enables natural conversation in an automated scenario, using a combination of integrated text-to-speech and speech-to-text technologies, along with integrated chatbots to "talk" to customers on inbound voice calls and "listen" for their spoken or DTMF (i.e., touch tones) response.

Play-Listen may be used in voice scenarios with Configure a Bot and Ask a Bot blocks when configuring conversational IVR. For more information, see the Scenario Builder Reference Guide, section Play-Listen.

Popping Case and Contact Information to Agents

Specific case and contact information can be popped to agents at the start of interactions if a direct access URL is included in a Web Screen Pop block in the Scenario Builder application.

For more information, see the Scenario Builder Reference Guide, section How to Create a Chat Scenario That Pops Case or Contact Information.

Random Function in Scenario Builder Application

The function `random(max)` is available to use in the Set Variable scenario block; when used, this function takes one integer parameter and returns a random integer number in the configured range (i.e., 0 to whatever number is defined as “max”). This function can be used, for example, to launch a random percentage of surveys.

For more information, see the Scenario Builder Reference Guide, section Built-In Functions.

Telephony

Dial Pad Button Added to Agent Desktop Call Controls

The Dial Pad button is added to the controls available to agents on active calls; this button pops a dial pad that allows agents to click on the keys or use their keyboard to enter DTMF keys. Note that this control may be used to speed dial through external IVRs.

For more information, see the Agent Guide, section Call Controls.

Speed Dial Through External IVRs

Version 5.3 allows the comma symbol (i.e., “,”) to be added to phone numbers and extensions entered in the number input field for the purpose of speed dialing through external IVRs. Each comma represents a one-second pause the system takes before entering the next DTMF key (i.e., 1-9, #, *); multiple commas may be configured consecutively for a longer pause.

Commas may be added at the end of a regular number or extension and then between subsequently dialed DTMF keys. Some examples of dialed numbers include the following:

- 18005556677,,1,,4
- 16506046789,,1,1234567890#
- 1002,3,2

Phone numbers and extensions dialed with comma symbols will appear in Agent Desktop's Recent list and can be saved to a contact record with the symbols included.

For more information, see the Agent Guide, section How to Speed Dial Through External IVRs.

Streamlined Call Transfers and Conference Calls
The *Initiate transfer or conference* button streamlines phone controls in the Agent Desktop application. When an agent is on a call and this button is selected, a search window will pop open. From here, the agent can search for a contact to blind transfer the call to, dial directly, or dial as a conference call.

For more information, see the *Agent Guide*, section *How to Make Consultations and Transfers*.

**Wallboard**

**Wallboard Font Size Adjustment Control**

Version 5.3 introduces a font size adjustment control for Wallboard widgets. Accessible in *Edit* mode, the control allows you to adjust the font size Agent Grid and Service Grid widgets.

For more information, see the *Wallboard Builder Reference Guide*, section *Title and Controls*.

**Wallboard Time Series Widgets**

The new *Time Series* widgets allow you to display service and team data in a linear, time-based chart. Chart data is updated every 10 seconds and is displayed in 30-second increments. Viewable data ranges from 15 minutes to seven days.

For more information, see the *Wallboard Builder Reference Guide*, section *About Time Series Widgets*.

**Version 5.2.11**

Bright Pattern Contact Center version 5.2.11 contains fixes for various defects; no changes have been made to the documentation.

**Version 5.2.10**

See what's new for Bright Pattern Contact Center version 5.2.10.

**Request Callback for Outbound Voice Services**

Outbound Voice service functionality allows Request Callback for *Preview* mode; this makes it possible for an agent to be reserved for a requested callback without indication to the agent.

For more information, see the *Contact Center Administrator Guide*, section *Outbound - General*.

**Version 5.2.9**
Version 5.2.8

See what's new for Bright Pattern Contact Center version 5.2.8.

Disposition Variable in Workflows

Starting from this release, the $(disposition) variable is added to the Workflow application. This variable allows you to take actions within a workflow based on your call center's configured dispositions. For example, you can create conditions in the If block that allow you to send different emails to customers based on what disposition their interaction received (i.e., send one follow-up email if the disposition is "Product sold" and a different follow-up email if the disposition is "Service provided").

For more information, see the Workflow Builder Reference Guide, section Variables.

Dialable Metric for Wallboard

The Dialable metric is now available in the Wallboard application; it may be displayed in the Single Statistic widget and Service Grid widget. This metric provides the number of records within this campaign that can be dialed at this moment.

For more information, see the Wallboard Builder Reference Guide.

Recording Retrieval API Method Extensions

The Get File and Get Metadata API methods now allow you to download recording files in the original stored format (GSM) without converting them to PCM format, as well as get audio recording metadata.

To use the API methods, you need to have the “Allow recording export API access” privilege.

User Management API Extensions

The User Management API now includes two new methods for automatically exporting detailed information: Export User Phone Numbers and Export Access Numbers.

Export User Phone Numbers returns users' phone extension, login ID, first name, last name, whether voicemail is activated, and whether a voicemail greeting is present.

Export Access Numbers returns access number data, including the number, media type, extension, name of the scenario used, and display name.

For more information, see the User Management API Specification, section Export User Phone Numbers and section Export Access Numbers.

Web Screen Pop Block Enhancement
The Web Screen Pop block in the Scenario Builder application now includes the option "Keep open when interaction is finished." When selected, this option keeps open the pop-out browser tab after an agent’s interaction with a customer has ended.

For more information, see the Scenario Builder Reference Guide.

Version 5.2.7

See what’s new for Bright Pattern Contact Center version 5.2.7.

Events Fired from Chat Widget

The chat widget now fires events when a user opens a pre-chat form, closes a pre-chat form, or starts a chat. In addition, the chat widget also fires events when a proactive offer appears on the screen, when a user closes it, or when a user starts a chat.

These events allow the webpage that contains the chat widget to process corresponding events or propagate them to third-party systems.

For more information on chat configuration, see the Contact Center Administrator Guide, section Web Chat Configuration.

Version 5.2.6

See what’s new for Bright Pattern Contact Center version 5.2.6.

Chat Widget Auto-Start

Release 5.2.6 introduces the option to configure the chat widget to initiate a chat session automatically upon a webpage loading. To do this, in the Web HTML snippet, add the attribute autostartChat with the value true; note that the default value is false.

For more information, see the Contact Center Administrator Guide, section Web Chat Configuration.

Version 5.2.5

Bright Pattern Contact Center version 5.2.5 includes the following new features.

Expanded Case Search for Email Addresses
Search filter functionality has been expanded for the My Cases section in Agent Desktop. You may search for any part of an email address by using the `email:` filter, followed by the desired part of the email address. For example, a search of “email:ma” could return results such as “example@gmai.com,” “masha@example.com,” and so forth.

For more information, see the Agent Guide, section How to Search Email Cases.

**New Metric for Surveys Table**

The metric `global_interaction_id` has been added to the `surveys` table; this metric is the Global Interaction Identifier. For more information see the Reporting Database Specification, section `surveys`.

**Version 5.2.4**

Bright Pattern Contact Center version 5.2.4 includes the following new feature.

**Skill Mapping for LoxySoft WFM Integration**

Version 5.2.4 introduces `skill mapping` for your LoxySoft WFM integration account. Skill mapping allows you to map your contact center's `service names` to code numbers in your Loxysoft account when configuring your integration account.

For more information, see the Contact Center Administrator Guide, section Integration Accounts.

**Version 5.2.3**

Bright Pattern Contact Center version 5.2.3 includes the following new features.

**New and Updated Scenario Builder Blocks**

New and updated scenario blocks are introduced in the Scenario Builder application; the blocks allow the creation and alteration of internal database objects.

- The Identify Contact block performs a search for contact information and associates contact information within the current interaction. The block can search either internal or external sources (i.e., those configured in Call Center Configuration > Identification). If this block is present anywhere in a scenario, automatic identification before the scenario start will not be performed.

- The Bright Pattern Create Object block inserts a new object into the internal contact database. The allowed object types are Case, Contact, Company, and Activity History.

- The Bright Pattern Delete Object block deletes an existing object from the database. The allowed object types are Case, Contact, and Company.
• The **Bright Pattern Update Object** block updates an existing object in the database. The allowed object types are Case, Contact, and Company.

• The **Bright Pattern Search Object** block finds an existing object in the database. The allowed object types are Case, Contact, Company, and Activity History.

• From version 5.2.3 onward, the **Retrieve Internal Record** block will be replaced by the **Bright Pattern Search Object** block. While the block will still be supported for previous versions of Bright Pattern Contact Center software, it will not be possible to add this block to any new scenarios, post upgrade.

• The **Set Case** block associates a case to the current interaction. When the interaction is delivered to the agent, the case tab will be automatically displayed on screen-pop forms.

### Contact Import & Export

Version 5.2.3 introduces section **Contact Import & Export** to Contact Center Administrator; this will replace and remove the **Bulk Export/Import Contacts** feature from the Agent Desktop **Contacts** screen.

**Contact Import & Export** expands contact management in the following ways:

- You have the option to export contacts that have been modified from a specific date.
- You have the ability to import up to one million contacts.
- Bulk import now includes FTP and SFTP as data source options.
- Section **Contact Import & Export** includes an option to delete contacts in bulk.

For more information, see the **Contact Center Administrator Guide**, section **Contact Import & Export**.

### Campaign Identification With Manual Outbound Calls

The checkbox **Limit manual outbound calls to numbers in lists and record manual call results in campaigns** has been added to **Services & Campaigns > Outbound - General Settings** for outbound or blended campaigns; it is available for all **campaign types**.

When enabled, this setting allows manually dialed phone numbers to be included in 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

For more information, see the **Contact Center Administrator Guide**, section **Outbound - General**.

### Case & Contact Management Search Enhancements

New settings can either expand search capabilities for the **My Cases** section in Agent Desktop or remove them entirely.

The checkbox **Display contacts and cases for default search results** has been added in **Case & Contact Management > General Settings**.
If the checkbox is checked, the first 200 cases/contacts are displayed, newest first (contacts are sorted by modified date/time in descending order; for cases, the drop-down menu is used for sorting). If the checkbox is unchecked, no search information is displayed; the agent will see "Enter search criteria" in the middle of the table, instead.

Search parameters have been expanded to include date of birth, first name, last name, and company fields, as well as removing case sensitivity from email searches.

Additionally, you can now filter search results using the following tags:

- **dob: DD/MM/YYYY** - This tag allows you to search for the date of birth of a contact in your local date format. For example, in the US, the local date format is DD/MM/YYYY.
- **company: XXX** - This tag performs a full-text search in the company table and returns the corresponded list of contacts. Note: XXX represents the name of the company.
- **email: XXX** - This tag performs a search for contacts or cases based on the email address. Note: XXX represents an email address.

For more information, see the *Contact Center Administrator Guide*, section *Case & Contact Management General Settings*.

**Localization for Wallboard**

Version 5.2.3 supports localization for the Wallboard application in English, German, and Japanese.

**Daily WFM Agent Performance Reports**

When scheduling WFM reports, agent performance reports are now run/delivered on a daily basis.

For more information see the *Contact Center Administrator Guide*, section *WFM Reports*.

**WFM reason codes mapping for Not Ready reasons**

You can now configure Not Ready reasons as numerical codes in real-time data.

For more information, see the *Contact Center Administrator Guide*, section *Integration Accounts*.

**Loxysoft WFM Integration**

Bright Pattern Contact Center software now supports integration with Loxysoft ProScheduler WFM. When configured, this allows the export of interactions statistics and agents events to Loxysoft.

For more information, see the *Contact Center Administrator Guide*, section *Integration Accounts*.

**Bright Pattern Search Object Block Added to Workflows**

The *Bright Pattern Search Object* block has been added to the Workflow Builder application; using this block can help when retrieving activity data and searching through the internal database.

For more information, see the *Workflow Builder Reference Guide*, section *Bright Pattern Search Object*.

**Version 5.2.2**
Bright Pattern Contact Center version 5.2.2 includes the following new features.

**NICE Integration**

NICE can be integrated for the quality management (QM) of your contact center by allowing reporting on call state and agent messages. Integration is configured in the Integration Accounts section of Contact Center Administrator.

**Location Settings for Proactive Offer Chat Widget**

Location settings have been added for the Proactive Offer chat widget; these settings allow you to configure where the widget will appear on the screen.

For more information, see the Chat Widget Configuration Guide, section Proactive Offer Styling.

**Section 508 Compliance**

In accordance with Section 508 of the United States Workforce Rehabilitation Act of 1973, the chat widget has been enhanced to be accessible to people with disabilities.

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Version 5.2.1

Bright Pattern Contact Center version 5.2.1 includes the following new features.

**New Zealand Date Format**

The region English-NZ has been added to Contact Center Administrator. When selected, the date format changes to DD/MM/YYYY.

For more information, see the Contact Center Administrator Guide, section Users > Location tab.

**Auto Pin Case on Agent-Initiated Chat and Call**

A new case and contact management setting allows cases created from an active call or chat to be automatically pinned to the creating agent. Automatically pinning interactions helps agents keep better track of work by preventing important chats and calls from getting lost.

For more information, see the Contact Center Administrator Guide, section Case & Contact Management > General Settings.

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Version 5.2.0
New Video and VoIP Settings for Web Chat

In the Chat Widget Configuration app, the checkbox that allows video calls will be replaced with two new checkboxes: VoIP call and Visitor video.

Prior to this release, there was a single option to allow video calls. With the new chat enhancements enabled, agents and customers now have the ability to switch between chat, video, and VoIP calls (i.e., audio only).

When a VoIP call is allowed, either the agent or customer in an active chat session may initiate an audio call. Similarly, when both VoIP call and visitor video are allowed, either the agent or customer may initiate a video call. **Note:** Calls always start as audio, with the option to upgrade to video.

Additionally, both parties have the ability to turn their cameras on or off during a video session (i.e., it is not necessary for both parties to have cameras on to make video calls).

For more information, see the Agent Guide, section How to Have an Audio Chat and section How to Have a Video Chat.

Chat Transcript Templates for Messaging/Chat

Release 5.2 introduces the Chat Transcript Templates tab in Messaging/Chat, located within section Scenario Entries in Contact Center Administrator. This tab allows you to configure a template for the purpose of sending chat or message transcripts. The template also may be used for automated password recovery messages.

Using Amazon CloudFront with Chat Widgets

Amazon CloudFront can be used for quick delivery of Bright Pattern Contact Center web chat components, such as scripts, CSS, and images.

Using the CloudFront content delivery system can significantly speed up the process of loading chat widgets in any part of the world. The Amazon Web Services cloud caches it from the nearest server in any geographic location, thus helping chat widgets to load faster than on our servers.

For more information, see the Chat Widget Configuration Guide, section How to Use Amazon CloudFront to Speed up Chat Widget Loading.

Content Erasure

To support compliance with the PCI DSS and GDPR requirements, Bright Pattern now allows authorized personnel to manually erase the content of any interactions selected via the Interaction Records page. Depending on the interaction media type, the content that can be erased includes voice recordings, voice recording transcripts, chat transcripts, the body of email messages, and screen recordings. Note that when content of an interaction is erased, the interaction record itself is preserved.

The ability to remove sensitive data from interaction records is enabled for users with the Security Administration privilege “Can edit and erase interaction records.”

System administrators can use the new Interactions Erasing feature to erase content from specific services and campaigns. For more information, see the Contact Center Administrator Guide, section Results tab.

Content erasure is recorded in your contact centers's audit log. System administrators can find each instance of erasure by searching for “Erase” operations.
Agents can disposition an interaction (if such a disposition is enabled) with a request to erase content, provided that they give a reason. The disposition will initiate a workflow, which sends the system administrator an internal message with the request.

**Extended Survey Functionality for IVR Scenarios**

To extend Survey functionality, we have made the following changes to the Scenario Builder and Contact Center Administrator applications:

- *Custom Reporting Fields*, previously located in subsection Reporting in Contact Center Administrator, has been renamed subsection *Custom* and contains two subsections: Custom Reporting Fields:5.2 and Custom Survey Fields.

- In the Scenario Builder application Record block, the Transcribe recording (which uses a Speech To Text integration account) checkbox allows Speech To Text integration accounts to transcribe recordings. Once checked, it also allows you to create variables that store the transcription and sentiment of recordings.

- In the Scenario Builder application Record block, the Store recording accessible via a URL field is used to create variables that allow you to send the URL as an email attachment or play it in Agent Desktop.

- In the Scenario Builder application Save Survey Response block, two additional variable-entry fields are present: Conversation or recording text transcript and Conversation or recording sentiment. Here, you may enter the transcription and sentiment variables created in the Record block.

- Additionally, the survey results storage table has been modified.

**Agent Selection Options in Historical Reports**

In the Reports tab of Contact Center Administrator, the checkbox Show disabled/deleted agents has been added to the agent selection drop-down menu. If left unchecked, the report will exclude disabled or deleted agents. The exclusion works even if agents had activity within the report time frame.

**New JavaScript API Methods**

New in-page JavaScript API methods allow agents to take certain actions directly from Agent Desktop. Previously, it was possible to take these actions only if they were included via scenario blocks in the Scenario Builder application.

With the postVariable method, a variable is pushed to a scenario as if the Set Variable block is included; the variable is then available in scenarios and workflows.

With the setReportingCustomField method, custom reporting fields can be entered during an agent's interaction with a customer; the method works like the Set Custom Reporting Field scenario block.

For added convenience, the setDispositionByName method sets the disposition for the current interaction by name, rather than by alphanumeric code (as with setDisposition).

Note: Inclusion of these methods does not replace corresponding scenario blocks; they are still available for use.

**Wallboard Builder Application Updates**

Release 5.2 introduces the following updates to the Wallboard Builder application:

New widget options:

- Widgets are now organized into the following categories: Standard Widgets, User Widgets, and Copy from
Existing

- New **Standard Widgets** include:
  - **Time** - This widget displays the current time and date.
  - **Image** - This widget allows the user to upload an image to the wallboard.

- **User Widgets** incorporate the same statistics from an agent's **My Grades** screen. These include:
  - **Break Time**
  - **Dispositions**
  - **My Stats**
  - **Satisfaction**
  - **Agenda**

- **Copy from Existing** allows you to copy any widget configured in any available wallboard to your current wallboard. These are organized alphabetically by wallboard name, then by widget name.

Additions to **menu** options:

- The **Rotation** option allows the screen to rotate automatically between your choice wallboards at a fixed interval (in seconds).
- The **Hide Title Bar** option allows users to hide the wallboard title and menu icon unless moused over. To hide the title bar, check the **Enabled** box. To return the title bar to the default view, uncheck the **Enabled** box.
- The **User Widgets** option allows you to select and apply an individual user's statistics instantly to all user widgets configured in a wallboard.