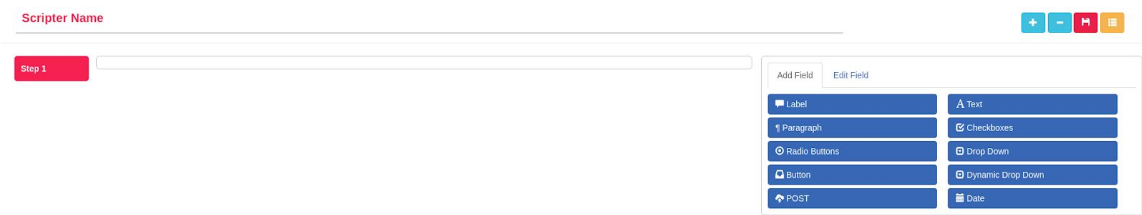
# Scripter


Used to create, edit, and execute agent outbound scripts.

# Adding a Scripter

1. Click the Plus button, , in the top right-hand corner of the Scripter screen, the following pop-up window will appear:

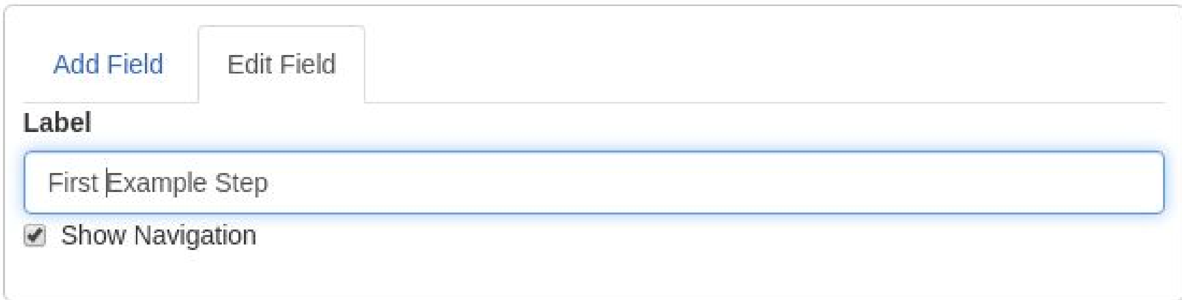



2. Click the "Scripter Name" input box (in red) and type the desired script name; an example is shown below:

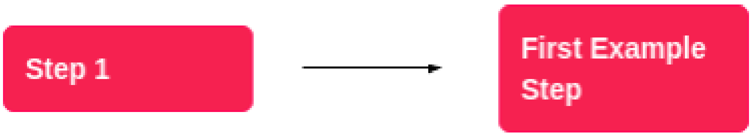

3. Click the "Step 1" button, 

, the following window will appear on the right-hand side of the screen:

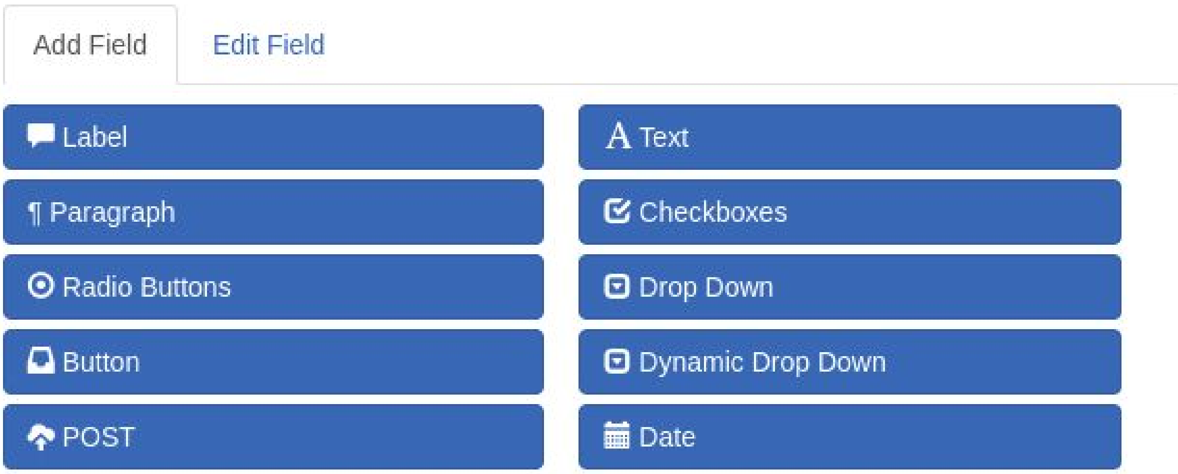
4. Click the "Label" input box, type the desired name for step 1, an example is shown below:




*Note the following transition will also occur on the left-hand side of the Scripter screen:*




5. After the desired step name is assigned, click "Add Field,"   . The following window will appear:



## Adding label Field

1. Click the “Label” button, 

, the following items will appear on the screen:


2. Double click the “Label” window once clicked it will become shaded as shown below:


Also, the “Edit Field” for the Label step will appear on the right-hand side of the screen, as shown below:


3. Click the “Label” input box, type as desired.

4. Check as desired, the checkboxes located below the “Label” input box, as shown below:


The following checkboxes are described below:

| | |
|---|---|
| Required | Marks the following field as required. |
| Show Summary | "Viewing a Scripter" section shows an example. |
| Show in Report | Shows the field in the report. |

*Note: when the checkboxes are selected, they can be seen in red under the field details as shown below:*


5. Click the save button, .

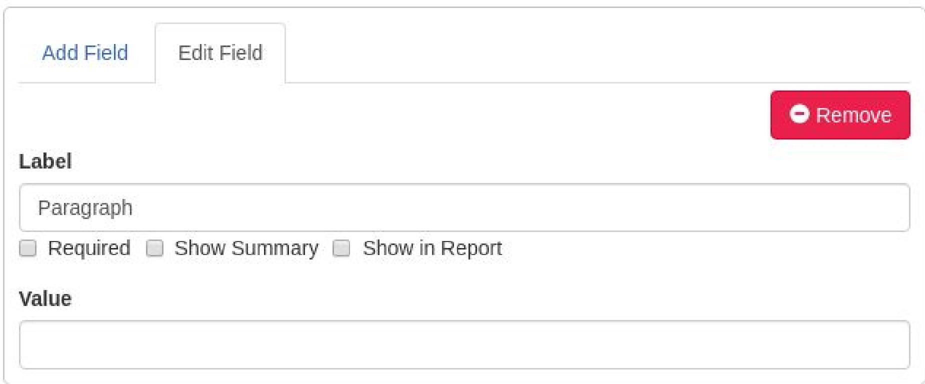
## Adding Paragraph Field

1. Click the "Paragraph" button, 

, the following items will appear on the screen:


2. Double click the "Paragraph" window once clicked it will become shaded as shown below:


*Also, the "Edit Field" for the Label step will appear on the right-hand side of the screen, as shown below:*




3. Click the "Label" input box, type as desired.

4. Check as desired, the checkboxes located below the “Label” input box, as shown below:


The following checkboxes are described below:

| | |
|---|---|
| Required | Marks the following field as required. |
| Show Summary | "Viewing a Scripter" section shows an example. |
| Show in Report | Shows the field in the report. |

*Note: when the checkboxes are selected, they can be seen in red under the field details as shown below:*

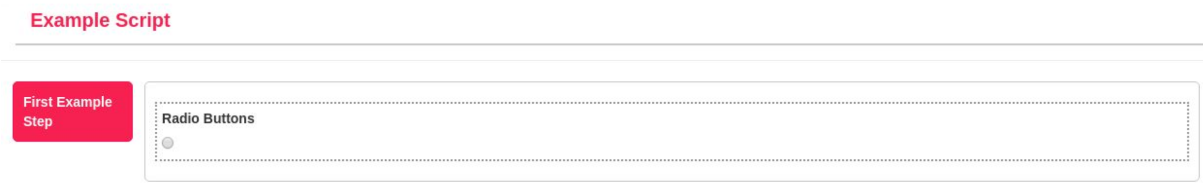

5. Click the “Value” input box, type as desired.

6. Click the save button, .

## Adding Radio Buttons Field

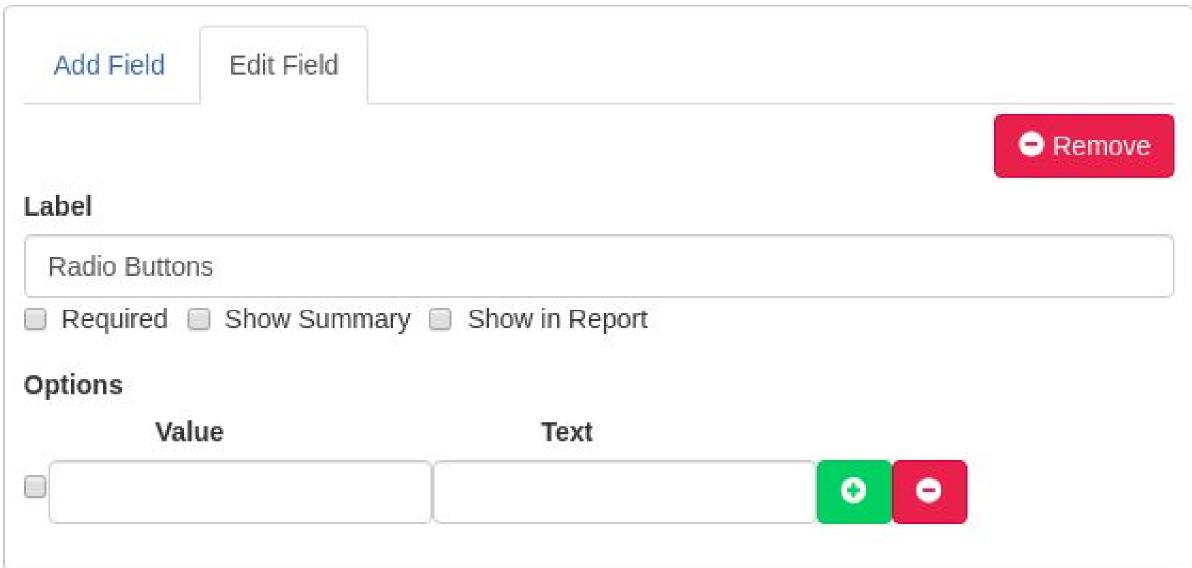
1. Click the “Radio Buttons” button, 

, the following items will appear on the screen:




2. Double click the “Radio Buttons” window once clicked it will become shaded as shown below:


*Also, the “Edit Field” for the Label step will appear on the right-hand side of the screen, as shown below:*




3. Click the “Label” input box, type as desired.

4. Check as desired, the checkboxes located below the “Label” input box, as shown below:

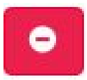

The following checkboxes are described below:

| | |
|---|---|
| Required | Marks the following field as required. |
| Show Summary | "Viewing a Scripter" section shows an example. |
| Show in Report | Shows the field in the report. |

*Note: When the checkboxes are selected, they can be seen in red under the field details as shown below:*


5. Click the “Value” input box, type as desired.
6. Click the “Text” input box, type as desired.

*Note: To add a radio button, click the add button,* .

*To remove a radio button, click the remove button,* .

7. Click the save button, .

## Adding Button Field

1. Click the "Button" button, 

, the following items will appear on the screen:


2. Click the "Default" button, 

, once clicked the "Edit Field" for the Label step will appear on the right-hand side of the screen as shown below:

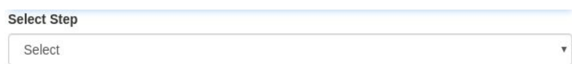

3. Click the "Label" input box, type as desired.

4. Click the “Class” dropdown box. The following dropdown menu will appear:


5. Select the desired button color.

6. Click the “Action” dropdown box. The following dropdown menu will appear:


The following actions are explained below:

| | |
|---|---|
| Next Step | If the button is clicked, the next step will appear. |
| Previous Step | If the button is clicked, the previous step will appear. |
| Go to | If Go to action is used, the following additional dropdown box will appear:<br><br>Select the desired step that will appear after the button is clicked. |

| | |
|---|---|
| Finish Scripter | If the button is clicked, the scripter will finish. |

7. Click the save button, .

## Adding POST Field

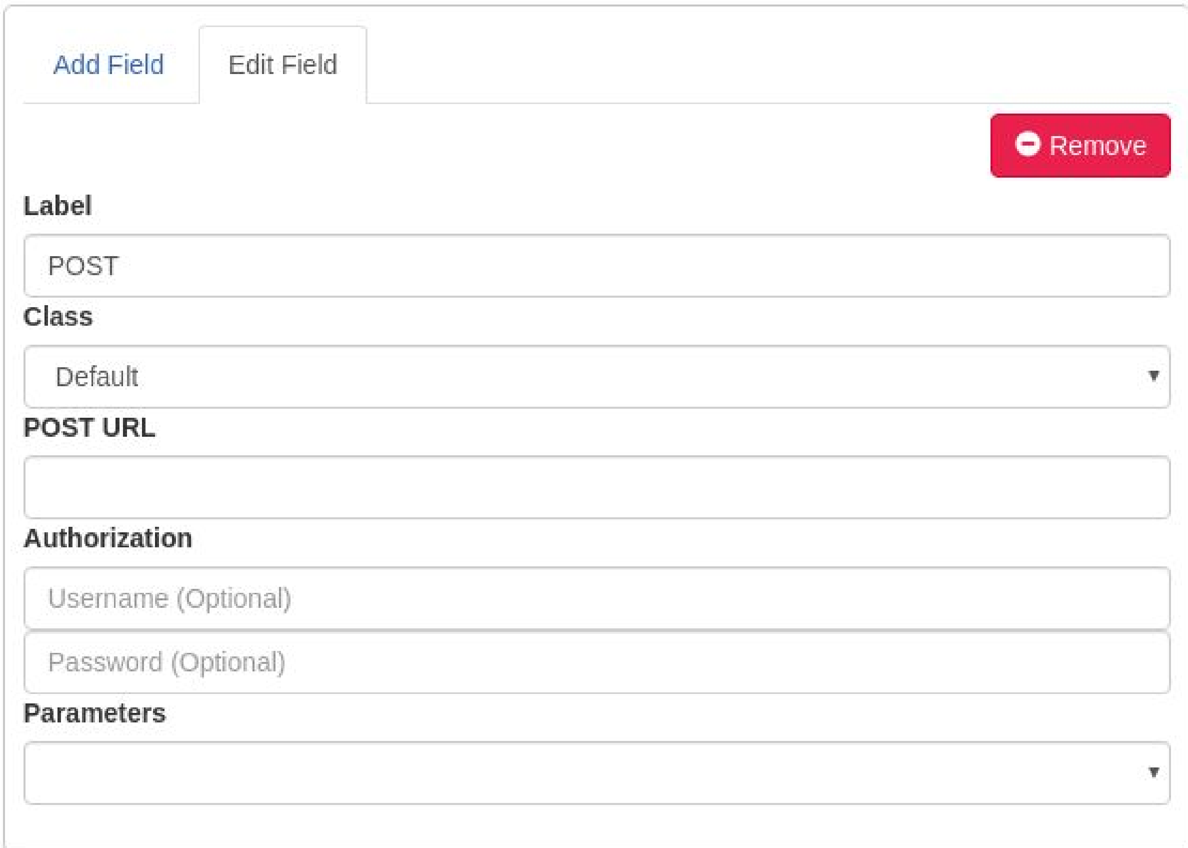
When using a CRM, it sends information to the web service to be pulled into CRM.

1. Click the "POST" button, 

, the following items will appear on the screen:


2. Click the "POST" button, 

, once clicked the "Edit Field" for the Label step will appear on the right-hand side of the screen as shown below:



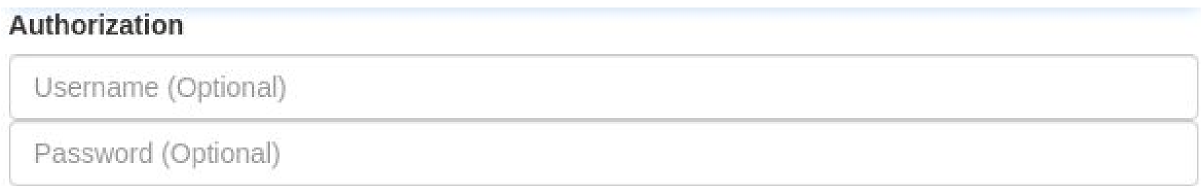

3. Click the "Label" input box, type as desired.

4. Click the “Class” dropdown box. The following dropdown menu will appear:


5. Select the desired POST button color.

6. Click the “POST URL” input box, type the desired URL.

7. Under the Authorization subtitle, there are two optional input boxes, as shown below:




If needed, type the Username and Password in the corresponding input boxes.

8. Click the “Parameters” dropdown box. The following dropdown menu will appear, as shown below:


The following parameters are explained below:

| | |
|---|---|
| All Contact Data | Only pulls data from Call Center Studio tenant uploaded in the Contact section. |

| | |
|---|---|
| Scripter Data | Only pulls data from the scripter inputs. |
| All Contact Data with Scripter Data | Pulls both the Call Center Studio tenant data and the scripter inputs. |

9. Click the save button, .

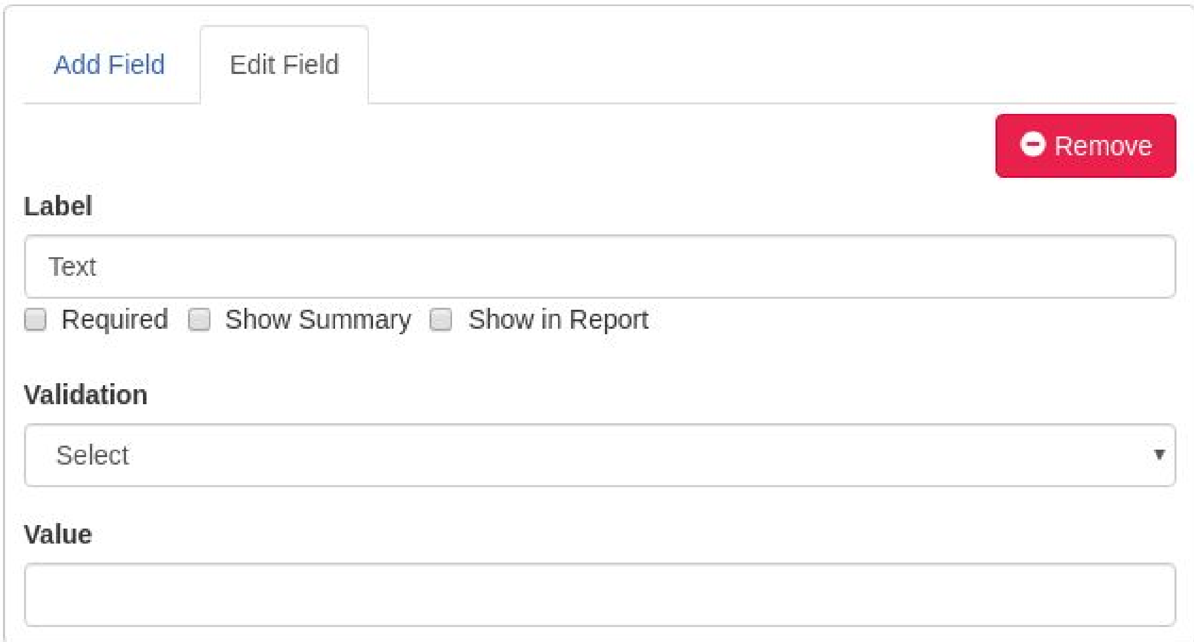
## Adding Text Field

1. Click the “Text” button, 

, the following items will appear on the screen:


2. Double click the “Text” window once clicked it will become shaded as shown below:


Also, the “Edit Field” for the Label step will appear on the right-hand side of the screen, as shown below:




3. Click the “Label” input box, type as desired.

4. Check as desired, the checkboxes located below the “Label” input box, as shown below:


The following checkboxes are described below:

| | |
|---|---|
| Required | Marks the following field as required. |
| Show Summary | Shows the following field. "Viewing a Scripter" section shows an example. |
| Show in Report | Shows the field in the report. |

*Note: when the checkboxes are selected, they can be seen in red under the field details as shown below:*


5. Click the “Validation” dropdown box. The following dropdown menu will appear, as shown below:

6. Select the desired validation option.

7. In the “Value” input box, type as desired.

8. Click the save button, .

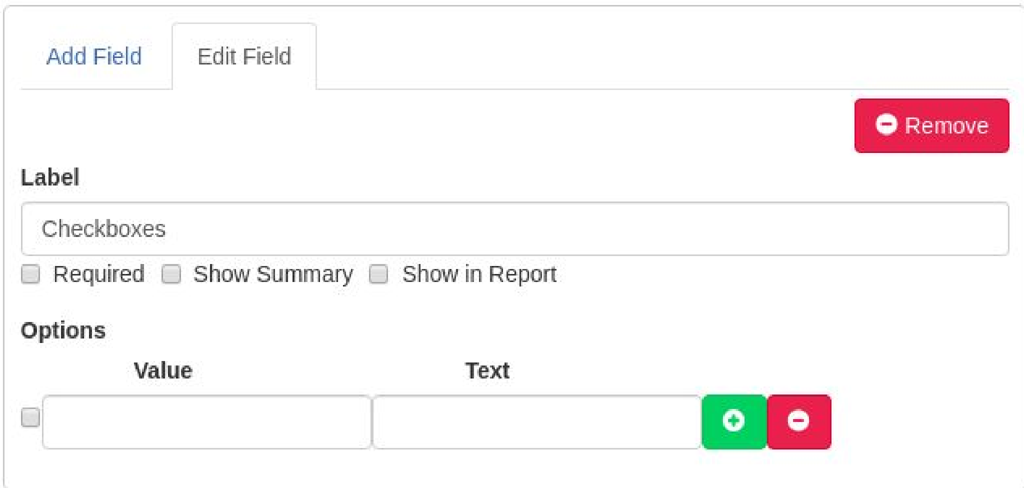
## Adding Checkboxes Field

1. Click the "Checkboxes" button, 

, the following items will appear on the screen:


2. Double click the "Checkboxes" window once clicked it will become shaded as shown below:


Also, the "Edit Field" for the Label step will appear on the right-hand side of the screen, as shown below:




3. Click the "Label" input box, type as desired.

4. Check as desired, the checkboxes located below the “Label” input box, as shown below:


The following checkboxes are described below:

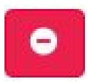
| | |
|---|---|
| Required | Marks the following field as required. |
| Show Summary | "Viewing a Scripter" section shows an example. |
| Show in Report | Shows the field in the report. |

*Note: when the checkboxes are selected, they can be seen in red under the field details as shown below:*


5. Click the “Value” input box, type as desired.
6. Click the “Text” input box, type as desired.

*Note:*

*To add a checkbox, click the add button,* .

*To remove a checkbox, click the remove button,* .

7. Click the save button, .

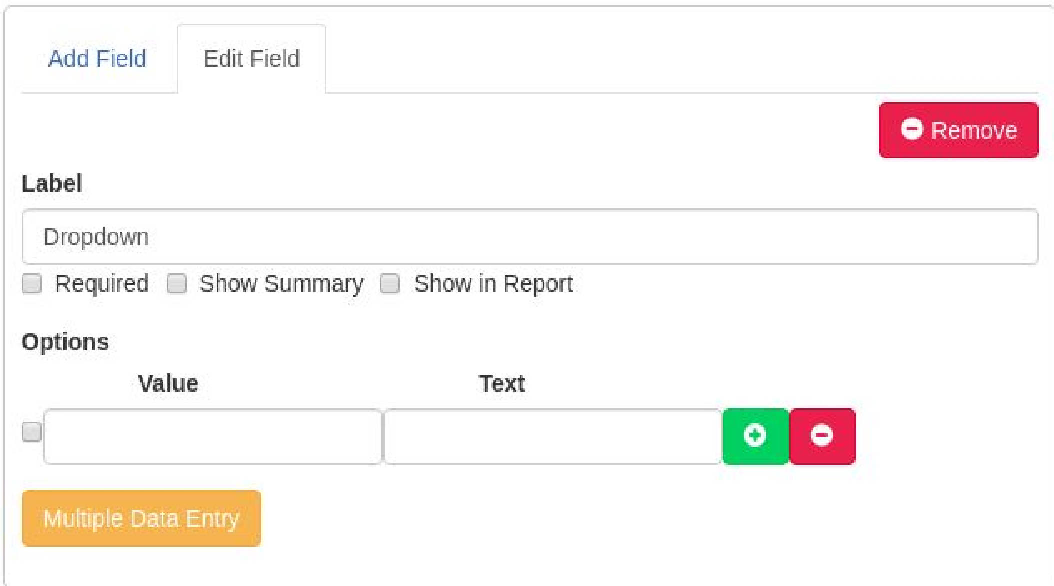
## Adding Drop Down Field

1. Click the "Drop Down" button, 

, the following items will appear on the screen:


2. Double click the "Drop Down" window once clicked it will become shaded as shown below:


Also, the "Edit Field" for the Label step will appear on the right-hand side of the screen, as shown below:



3. Click the “Label” input box, type as desired.

4. Check as desired, the checkboxes located below the “Label” input box, as shown below:


The following checkboxes are described below:

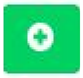
| | |
|---|---|
| Required | Marks the following field as required. |
| Show Summary | "Viewing a Scripter" section shows an example. |
| Show in Report | Shows the field in the report. |

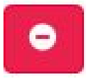
*Note: when the checkboxes are selected, they can be seen in red under the field details as shown below:*


5. Click the “Value” input box, type as desired.

6. Click the "Text" input box, type as desired.

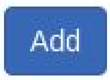
*Note:*

*To add a dropdown selection, click the add button,*  *.*

*To remove a dropdown selection, click the remove button,*  *.*

*To perform multiple data entry, click the "Multiple Data Entry" button,*


*, the following window will appear:*


*Type as desired, then click the "Add" button,* 


*.*

7. Click the save button,  .

## Adding Dynamic Drop Down Field

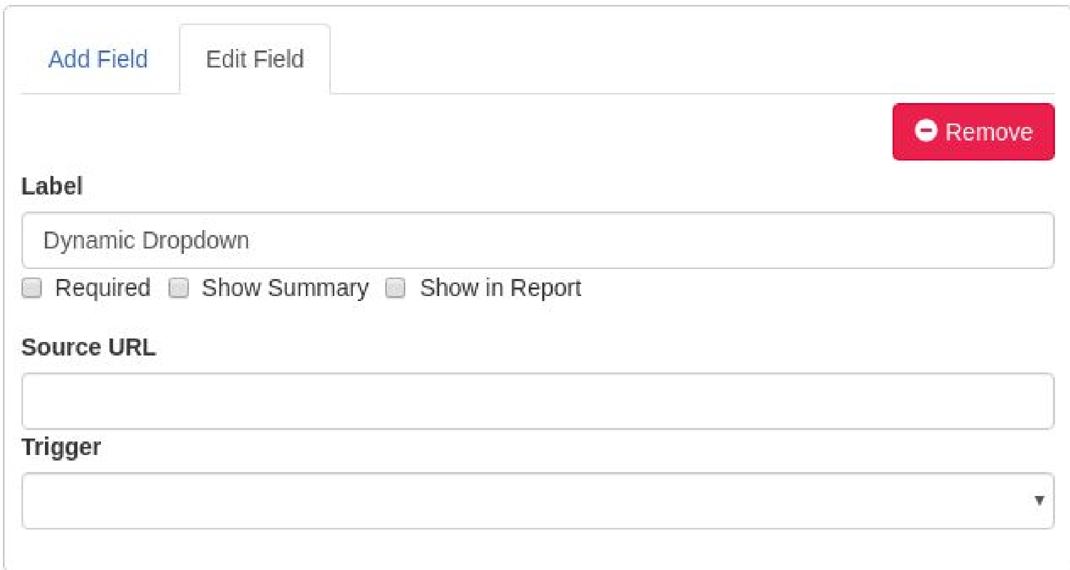
When using a CRM, allows the dropdown box selection to change dynamically based on changes to a CRM.

1. Click the "Dynamic Drop Down" button, 

, the following items will appear on the screen:


2. Double click the "Dynamic Drop Down" window once clicked it will become shaded as shown below:


Also, the "Edit Field" for the Label step will appear on the right-hand side of the screen, as shown below:



3. Click the “Label” input box, type as desired.

4. Check as desired, the checkboxes located below the “Label” input box, as shown below:


The following checkboxes are described below:

| | |
|---|---|
| Required | Marks the following field as required. |
| Show Summary | "Viewing a Scripter" section shows an example. |
| Show in Report | Shows the field in the report. |

*Note: when the checkboxes are selected, they can be seen in red under the field details as shown below:*


5. In the “Source URL” input box, type the desired source URL.

6. In the “Trigger” dropdown box, select the desired trigger.

7. Click the save button, .

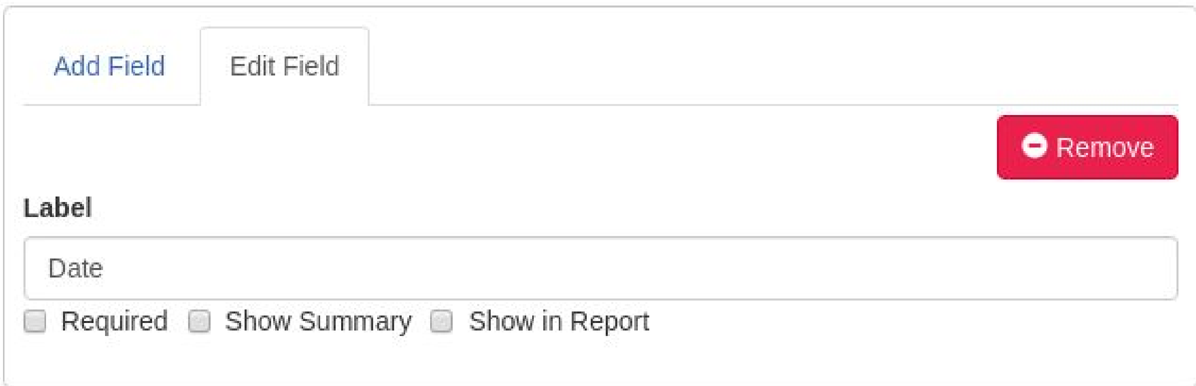
## Adding Date Field

1. Click the "Date" button, 

, the following items will appear on the screen:


2. Double click the "Date" window once clicked it will become shaded as shown below:


Also, the "Edit Field" for the Label step will appear on the right-hand side of the screen, as shown below:




3. Click the "Label" input box, type as desired.

4. Check as desired, the checkboxes located below the “Label” input box, as shown below:


The following checkboxes are described below:

| | |
|---|---|
| Required | Marks the following field as required. |
| Show Summary | "Viewing a Scripter" section shows an example. |
| Show in Report | Shows the field in the report. |

*Note: When the checkboxes are selected, they can be seen in red under the field details, as shown below:*


5. Click the save button, .

## Editing a Field

1. Double click the desired field window, once clicked it will become shaded like the example shown below:


Also, the "Edit Field" for the desired step will appear on the right-hand side of the screen like the example shown below:

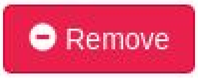

2. Make the desired changes.

3. Click the save button,  .

## Deleting a Field

1. Double click the desired field window, once clicked it will become shaded like the example shown below:


Also, the "Edit Field" for the desired step will appear on the right-hand side of the screen like the example shown below:


2. Click the remove button, 

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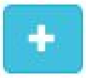
# Adding a Scripter Step

1. Click the new button,  , in the top right corner, the following pop-up screen will appear:


2. Click the “Step Name” input box, type as desired. An example is shown below:

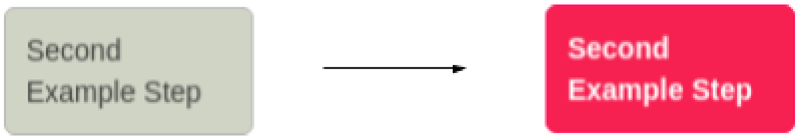

3. Click the save button, 

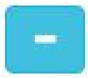
. The new step will be shown on the left-hand side of the scripter screen.

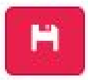

4. Click the save button,  .

# Deleting a Scripter Step

1. Click the desired step, once clicked, the step will transition to red as seen below:




2. Click the delete button,  .

3. Click the save button,  .

# Editing a Scripter

1. To edit a scripter, click the edit button, , located on the far right of the Scripter name after the "Date" column as shown below:

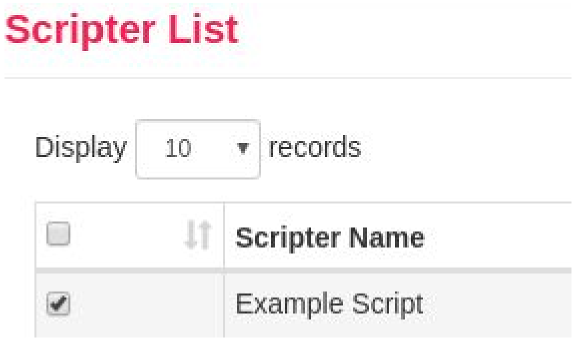

2. Make Changes as desired.

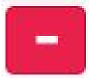
3. Click the save button, .

4. Click the return button, , to return to the Scripter list.

# Deleting a Scripter

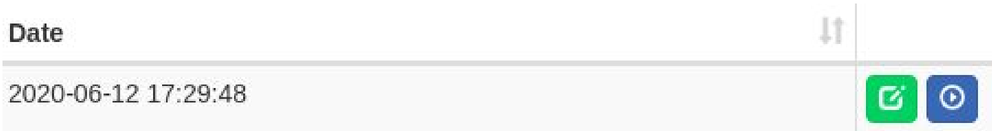
1. From the Scripter  list, check the desired scripter, on right-hand side of the scripter name as shown below:



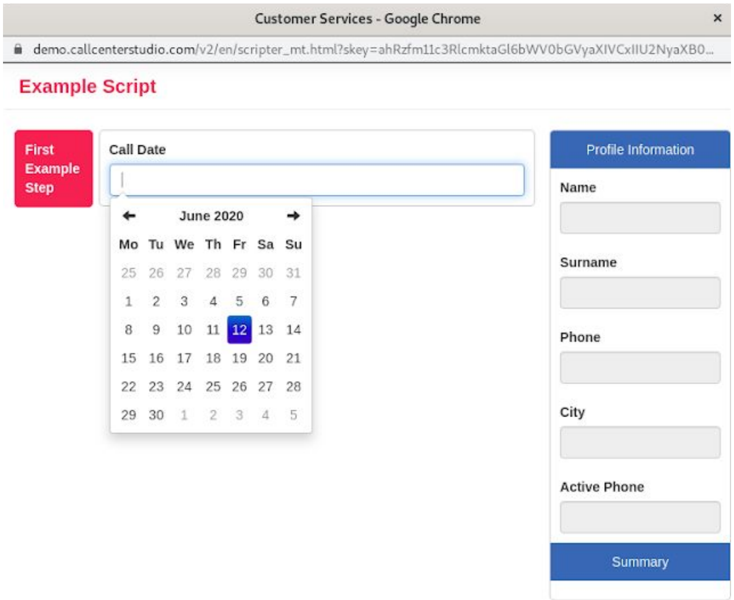

2. Confirm the deletion by clicking the delete button,  .

# Viewing a Scripter

1. To view a scripter, click the view button,  , located on the far right of the Scripter name after the edit button,  , as shown below:

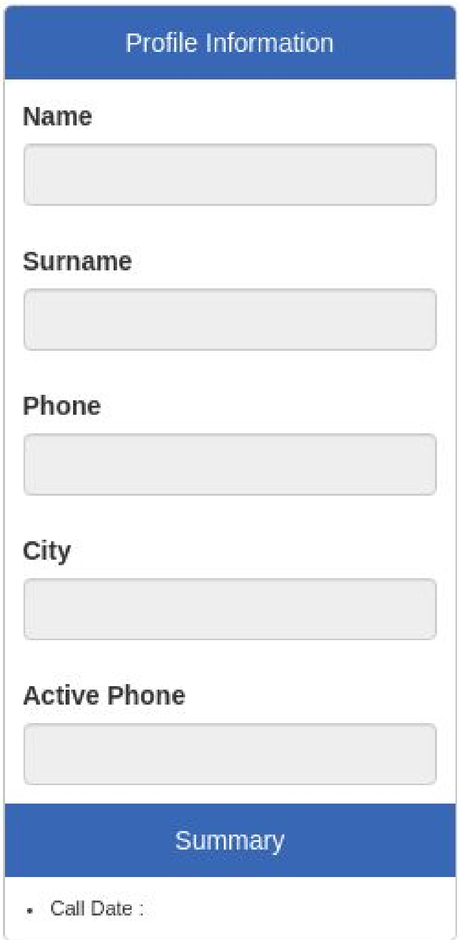



*The following is an example pop-up window of the Example Script, showing a date step:*




*Note: The Profile information section on the right-hand side of the screen will pull information regarding the contact that is run through the campaign (assuming the information was added to the contact on the Call Center Studio contact list section.*

*Also, if "Show Field Summary" checkbox was selected for the fields, the field name will be displayed below the Profile Information section, as shown below:*




2. After viewing, click the "X," ✕ , to exit.

# Searching a Scripter

1. Click the “Search” input box, type the scripter’s name, the input box is shown below:


*Note: Partial names can be used, when spelled correctly.*