


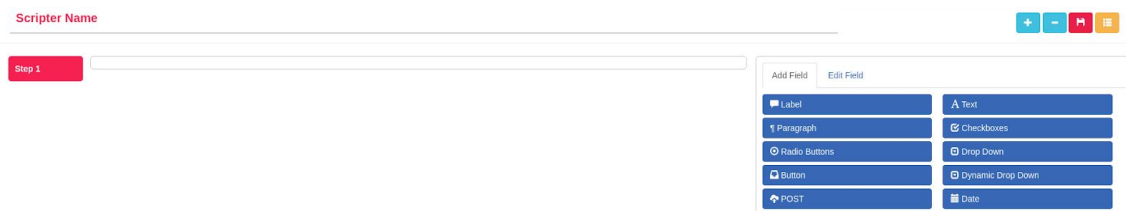
Scripter



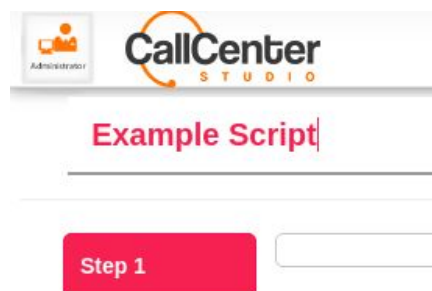
Used to create, edit, and execute agent outbound scripts.


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:

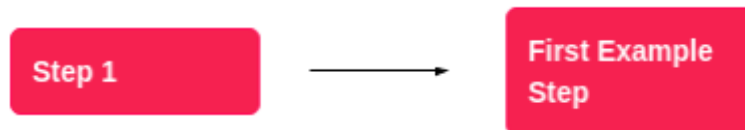



4. Click the “Label” input box, type the desired name for step 1, an example is shown below:

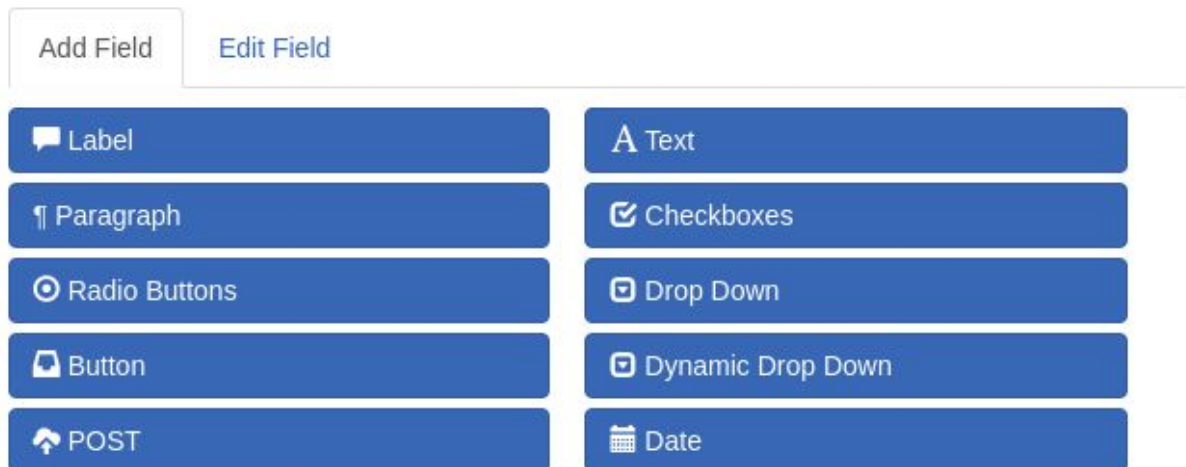


The screenshot shows a window with two tabs: 'Add Field' and 'Edit Field'. The 'Edit Field' tab is active. Below the tabs, the word 'Label' is displayed. A text input box contains the text 'First Example Step'. Below the input box, there is a checkbox labeled 'Show Navigation' which is checked.











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:



The screenshot shows a window with two tabs: 'Add Field' and 'Edit Field'. The 'Add Field' tab is active. Below the tabs, there is a list of field types arranged in two columns. Each item consists of an icon and a text label.

 Label	 Text
 Paragraph	 Checkboxes
 Radio Buttons	 Drop Down
 Button	 Dynamic Drop Down
 POST	 Date

Adding label Field

1. Click the “Label” button, , the following items will appear on the screen:

Example Script



The image shows a window titled "First Example Step" on the left. To its right is a single step in a script, represented by a dashed rectangular box containing the text "Label".

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



The image shows a single step in a script, represented by a dashed rectangular box containing the text "Label". The box is shaded gray, indicating it is selected.

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



The image shows a window titled "Edit Field" for the "Label" step. At the top, there are two tabs: "Add Field" and "Edit Field". Below the tabs, there is a "Label" section with a text input box containing the text "Label". To the right of the input box is a red "Remove" button. Below the input box, there are three checkboxes: "Required", "Show Summary", and "Show in Report".

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

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

☐ Required ☐ Show Summary ☐ Show in Report

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:

Example Label


Required

Show Summary

Show in Report

5. Click the save button,  .

Adding Paragraph Field

1. Click the “Paragraph” button,  , the following items will appear on the screen:

Example Script



First Example Step

Paragraph

A text input field with a dashed border and a small icon in the bottom right corner.

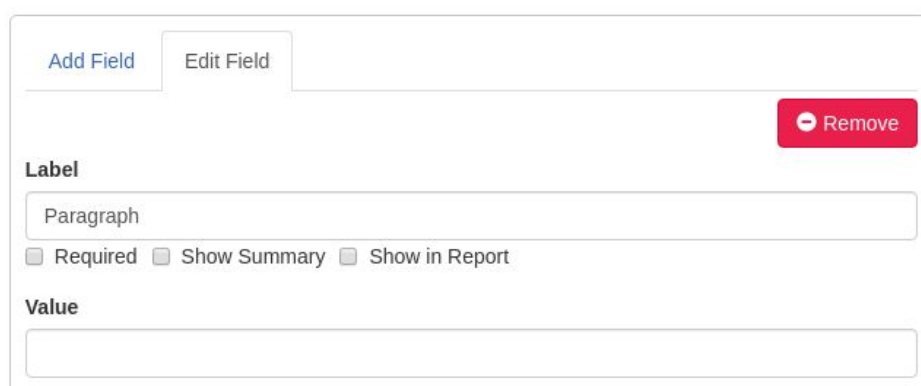
2. Double click the “Paragraph” window once clicked it will become shaded as shown below:



Paragraph

A text input field with a solid gray header bar and a dashed border.

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



Add Field Edit Field

Remove

Label

Paragraph

☐ Required ☐ Show Summary ☐ Show in Report

Value

A text input field.

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

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

☐ Required ☐ Show Summary ☐ Show in Report


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:

Example Script



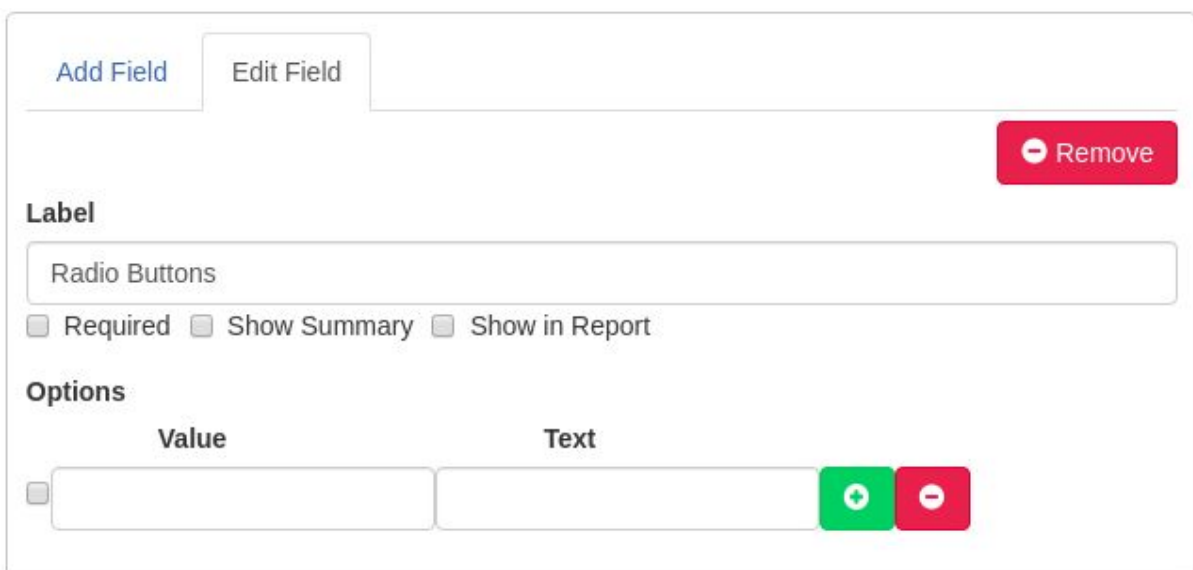
The screenshot shows a red button labeled 'First Example Step'. To its right is a dashed rectangular box containing the text 'Radio Buttons' and a small radio button icon.

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



The screenshot shows the 'Radio Buttons' field from the previous step, now with a gray shaded background.

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



The screenshot shows the 'Edit Field' window. It has two tabs: 'Add Field' and 'Edit Field'. The 'Edit Field' tab is active. In the top right corner is a red button with a minus sign and the text 'Remove'. Below this is a section titled 'Label' with a text input box containing 'Radio Buttons'. Underneath the input box are three checkboxes: 'Required', 'Show Summary', and 'Show in Report'. Below these is a section titled 'Options' with two columns: 'Value' and 'Text'. Under 'Value' is a checkbox and an empty text input box. Under 'Text' is an empty text input box, a green button with a plus sign, and a red button with a minus sign.

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

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

☐ Required ☐ Show Summary ☐ Show in Report

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,



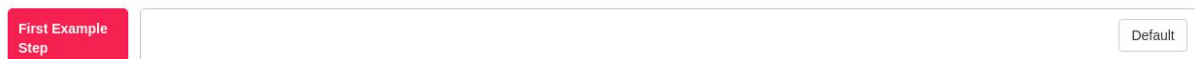
7. Click the save button,




Adding Button Field

1. Click the “Button” button,  Button, the following items will appear on the screen:

Example Script



First Example Step Default

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:



Add Field Edit Field

Remove

Label

Default

Class

Default ▼

Action

▼

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

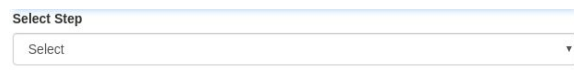
4. Click the “Class” dropdown box. The following dropdown menu will appear:



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	<p>If Go to action is used, the following additional dropdown box will appear:</p>  <p>Select the desired step that will appear after the button is clicked.</p>

Finish Scripter	If the button is clicked, the scripter will finish.
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7. Click the save button,




Adding POST Field

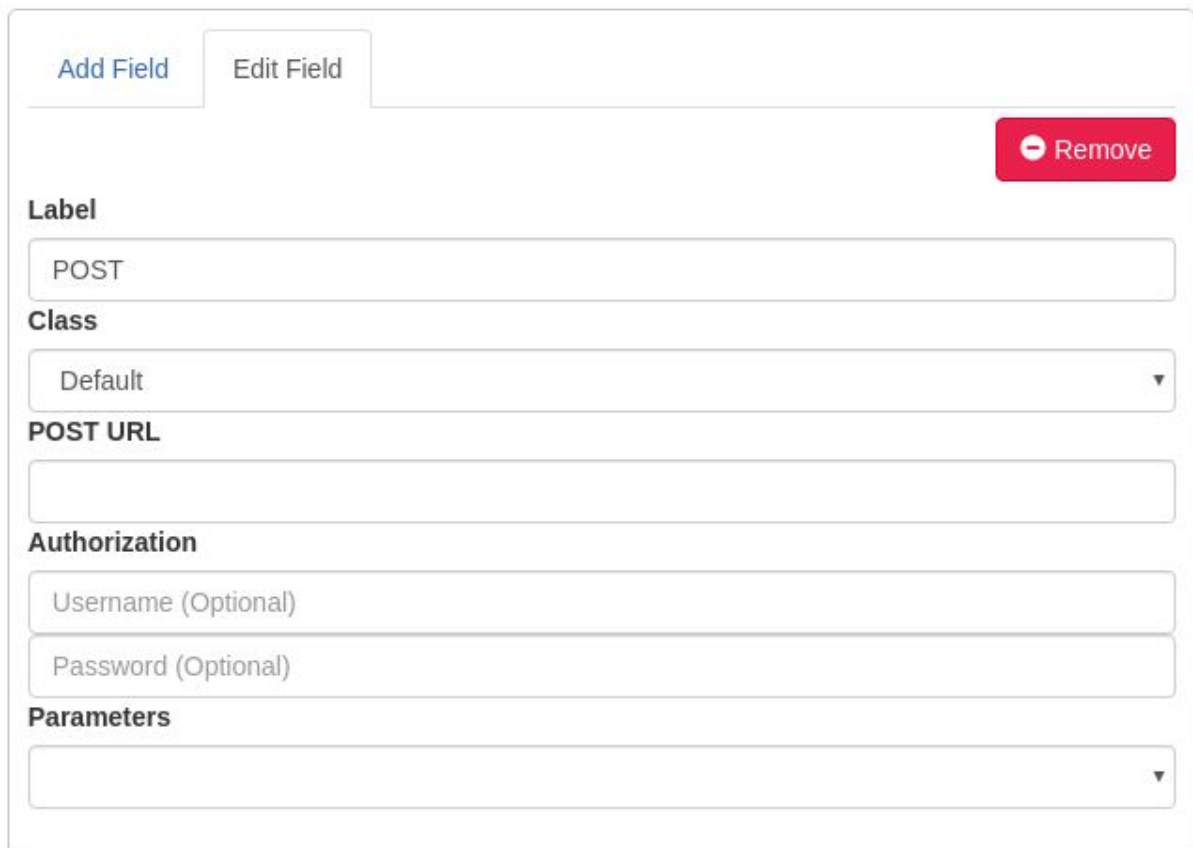
When using a CRM, it sends information to the web service to be pulled into CRM.

1. Click the “POST” button,  , the following items will appear on the screen:

Example Script



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:

Class

Default

- Default
- Blue
- Red
- Green
- Yellow
- Dark Blue
- Black

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:

Authorization

Username (Optional)

Password (Optional)

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:

Parameters


All Contact Data

- Scripter Data
- All Contact Data with Scripter Data

The following parameters are explained below:

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

Example Script



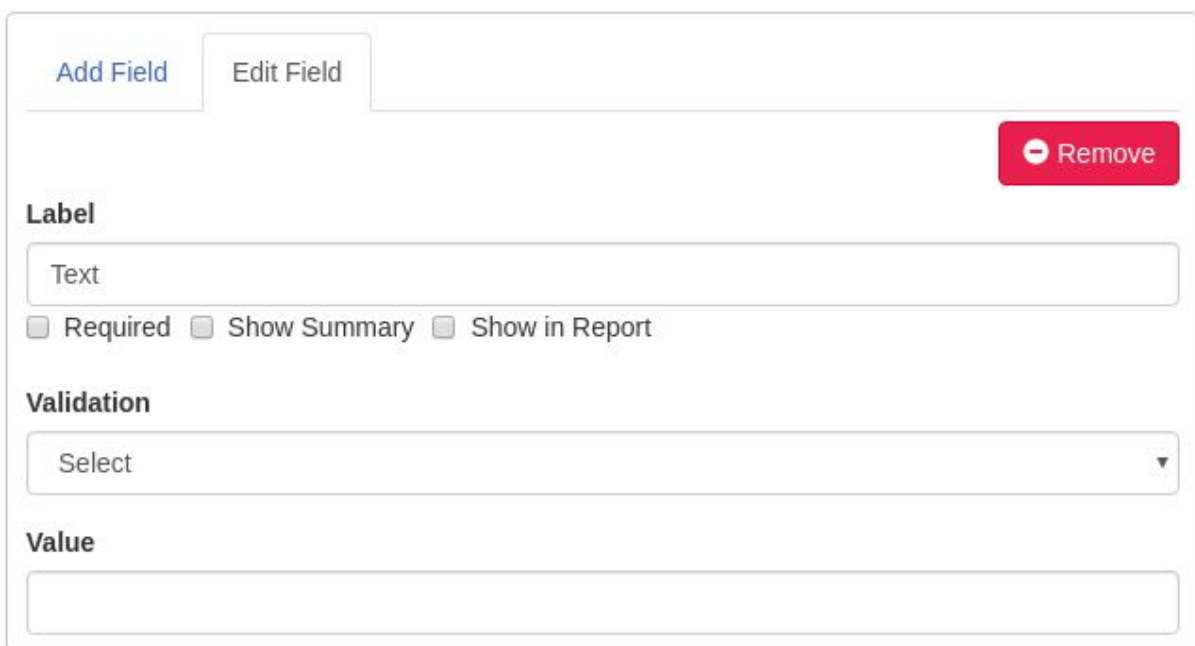
The screenshot shows a red button labeled 'First Example Step'. To its right is a dashed rectangular box containing the word 'Text' in the top left corner and a white text input field below it.

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



The screenshot shows a dashed rectangular box where the entire area is shaded gray. The word 'Text' is in the top left corner, and a white text input field is at the bottom.

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



The screenshot shows a configuration panel with two tabs: 'Add Field' and 'Edit Field'. The 'Edit Field' tab is active. In the top right corner is a red button with a minus icon and the text 'Remove'. Below this is the section 'Label' with a text input field containing 'Text'. Underneath are three checkboxes: 'Required', 'Show Summary', and 'Show in Report'. The next section is 'Validation' with a dropdown menu currently showing 'Select'. The final section is 'Value' with an empty text input field.

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

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

☐ Required ☐ Show Summary ☐ Show in Report

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:

Example Script



First Example Step

Checkboxes

☐

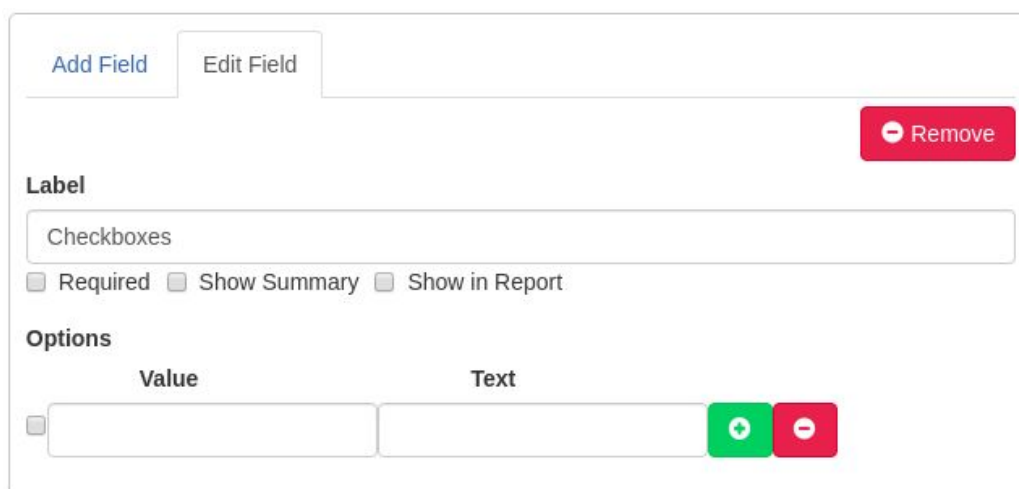
2. Double click the “Checkboxes” window once clicked it will become shaded as shown below:



Checkboxes

☐

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



Add Field Edit Field Remove

Label

Checkboxes

☐ Required ☐ Show Summary ☐ Show in Report

Options

Value	Text
<input type="checkbox"/>	<input type="text"/>

+ -

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

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

☐ Required ☐ Show Summary ☐ Show in Report

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:

Example Script



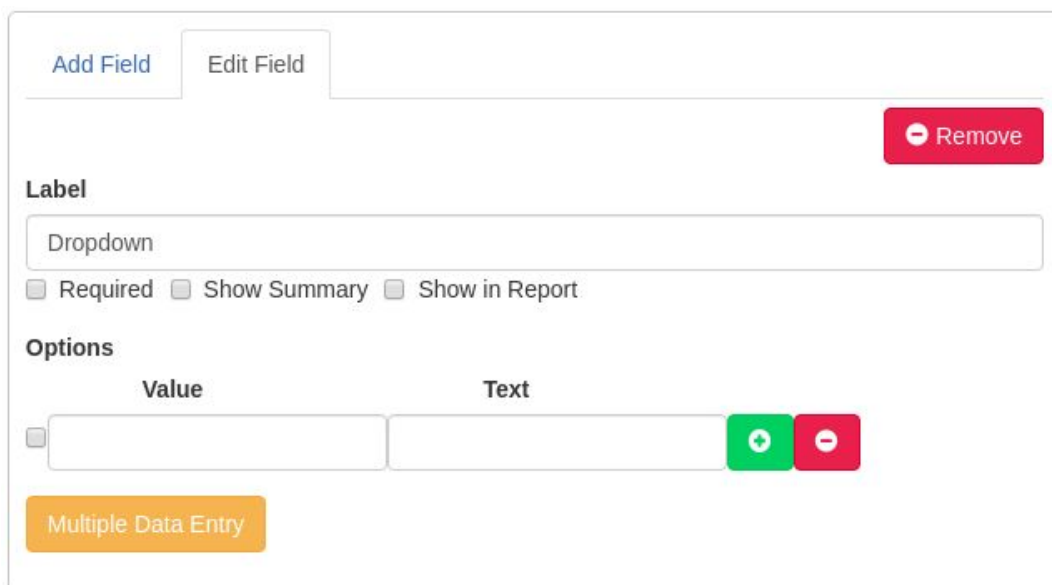
The screenshot shows a red box labeled 'First Example Step' on the left. To its right is a white box containing a 'Dropdown' label and a text input field with a downward arrow on the right side.

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



The screenshot shows the 'Dropdown' field with a shaded gray header bar at the top containing the word 'Dropdown'. Below the header is a white text input field with a downward arrow on the right side.

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



The screenshot shows the 'Edit Field' configuration window. At the top, there are two tabs: 'Add Field' and 'Edit Field'. On the right side, there is a red 'Remove' button. The main section is titled 'Label' and contains a text input field with the value 'Dropdown'. Below this, there are three checkboxes: 'Required', 'Show Summary', and 'Show in Report'. The 'Options' section has two columns: 'Value' and 'Text'. Under 'Value', there is a checkbox and a text input field. Under 'Text', there is a text input field and two buttons: a green '+' button and a red '-' button. At the bottom, there is an orange 'Multiple Data Entry' button.

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

☐ Required ☐ Show Summary ☐ Show in Report

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:

A screenshot of a window titled "Multiple Data Entry" with a close button (X) in the top right corner. The window contains a large, empty text input area with a blue border. Below the input area is a blue "Add" button.


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:

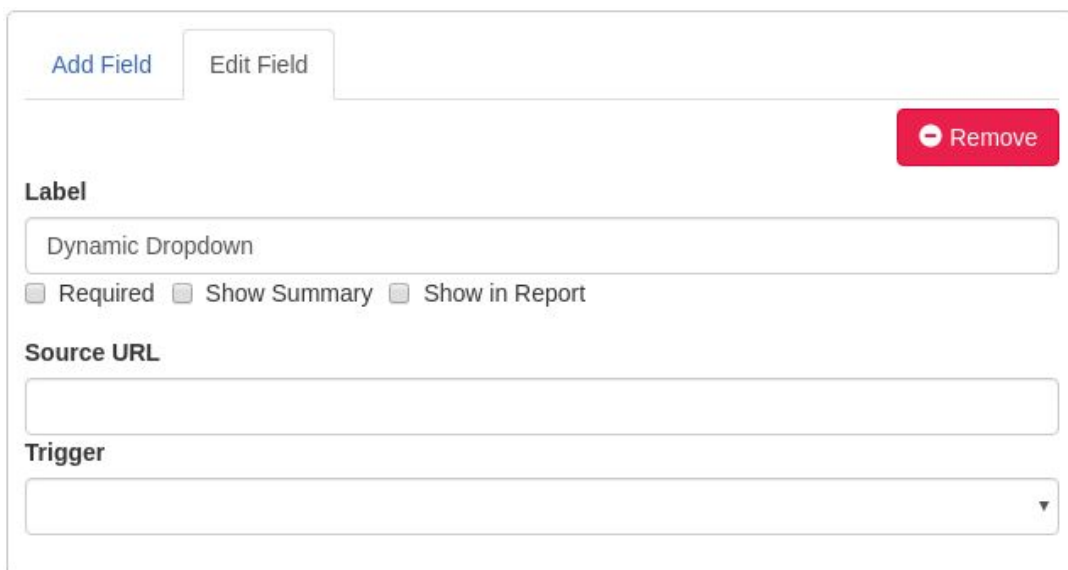
Example Script



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:



The dialog shows the configuration for the 'Dynamic Dropdown' field. It includes tabs for 'Add Field' and 'Edit Field', with 'Edit Field' currently selected. A 'Remove' button is in the top right. The 'Label' section contains the field name 'Dynamic Dropdown' and three checkboxes: 'Required', 'Show Summary', and 'Show in Report'. The 'Source URL' section has a text input field. The 'Trigger' section has a dropdown menu.

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

☐ Required ☐ Show Summary ☐ Show in Report


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:

Example Script



The screenshot shows a script editor window. On the left, a red tab labeled 'First Example Step' is selected. The main area contains a field labeled 'Date' with a dotted border, indicating it is a new or unconfigured field.

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



The screenshot shows the 'Date' field from the previous step, now shaded gray, indicating it has been selected or is the active field.

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



The screenshot shows the 'Edit Field' dialog box. It has two tabs: 'Add Field' and 'Edit Field', with 'Edit Field' currently selected. The dialog contains a 'Label' section with an input box containing the text 'Date'. Below the input box are three checkboxes: 'Required', 'Show Summary', and 'Show in Report'. A red 'Remove' button is located in the top right corner of the dialog.

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

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

☐ Required ☐ Show Summary ☐ Show in Report

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:

Date

Required
Show Summary
Show in Report

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:

A screenshot of the "Edit Field" panel. At the top, there are two tabs: "Add Field" and "Edit Field", with "Edit Field" being the active tab. Below the tabs, there is a "Label" section with a text input field containing the word "Label". To the right of this section is a red button with a minus icon and the text "Remove". Below the text input field, there are three checkboxes: "Required", "Show Summary", and "Show in Report", all of which are currently unchecked.

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:

A screenshot of the 'Edit Field' panel. At the top, there are two tabs: 'Add Field' and 'Edit Field', with 'Edit Field' being the active tab. Below the tabs, there is a large text input field containing the word 'Label'. To the right of this field is a red button with a white minus icon and the text 'Remove'. Below the text input field, there are three checkboxes: 'Required', 'Show Summary', and 'Show in Report', all of which are currently unchecked.

2. Click the remove button,



Adding a Scripter Step

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




The "Add Step" pop-up screen features a title bar with "Add Step" and a close button (X). Below the title bar is a text input field labeled "Step Name". At the bottom right of the pop-up is a blue "Save" button.

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




This screenshot shows the "Add Step" pop-up screen with the text "Second Example Step" entered into the "Step Name" input field. The "Save" button remains at the bottom right.

3. Click the save button, . The new step will be shown on the left-hand side of the scripter screen.



The "Example Script" screen displays a list of steps on the left-hand side. The first step, "First Example Step", is highlighted in a red box. Below it is a grey box labeled "Second Example Step". To the right of the steps is a large text area for the script content.

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:

Date	
2020-06-12 17:29:48	 

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:



Scripter List

Display records

<input type="checkbox"/>	↕	Scripter Name
<input checked="" type="checkbox"/>		Example Script

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

Viewing a Scripter

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

Date	
2020-06-12 17:29:48	 

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

Customer Services - Google Chrome

demo.callcenterstudio.com/v2/en/scripter_mt.html?sk=ahRzfm11c3RlcmktaGl6bWV0bGVyaXlVcXlU2NyaXB0...

Example Script

First Example Step

Call Date

June 2020

Mo	Tu	We	Th	Fr	Sa	Su
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

Profile Information

Name

Surname

Phone

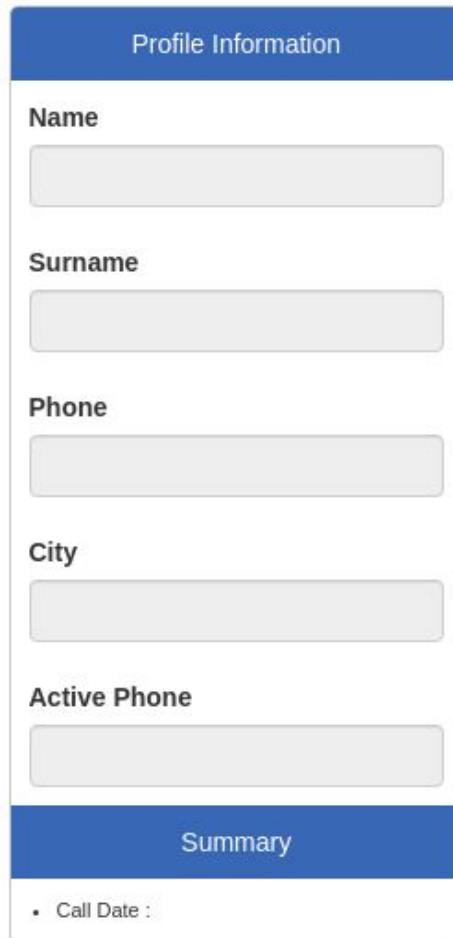
City

Active Phone

Summary

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:

Search :

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