

5.3 Email Settings

Bright Pattern Documentation

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Scheduled Reports

Bright Pattern Contact Center supports automatic generation of reports and their delivery to specified destinations as email attachments and/or via FTP.

To define report generation schedules and specify the delivery methods and destinations, select the **Scheduled Reports** option from the *Reporting* menu.



Reporting > Scheduled Reports

Select the type of report that will be generated. For more information see sections [Aggregate Reports](#) and [Detailed Reports](#) of the *Bright Pattern Contact Center Reporting Reference Guide*.

After selecting a report name from the list of reports, click **Schedule this report for distribution**.

Note: Bright Pattern Contact Center provides several reports for use with the scheduling functions of the Aspect Workforce Management application. Names of these reports begin with *WFM*. For complete specifications of these reports, please refer to the Aspect Workforce Management documentation. These reports should be scheduled for selected agent teams with the *Time frame* parameter set to *Today*, and the *Recurrence* parameter set to *Hourly*. See the description of the *Parameters* tab below for more information.

Screen Properties

The *Scheduled Reports* screen properties are organized into three tabs (Parameters, Email Delivery, and FTP Delivery), which are described as follows.

Parameters tab

Enabled

Select the *Enabled* checkbox to enable report generation and delivery according to the specified schedule.

Recurrence

Select the recurrence pattern (Hourly, Daily, Weekly, Monthly). Each pattern has a specific set of parameters that are explained below.

Hourly recurrence is typically used for periodic automated data feed into systems that process statistical data, such as workforce management applications. Note that an hourly report runs when data aggregated for the full previous hour becomes available; thus, hourly reports will always be generated with some delay.

Run at

This setting is available for all but the *Hourly* recurrence pattern. It specifies the time of day when the given report will be generated.

Repeat every

This setting is available only for the *Hourly* and *Daily* recurrence patterns and should normally be used with the *Time frame* parameter set to *Today*. It specifies how often the given report will be generated. For the *Hourly* recurrence, it is set for continuous updates with the period of one hour, a half-hour, or 15 minutes. For the *Daily* recurrence, it is used to generate reports with the desired frequency between the times specified by settings *Run at* and *Repeat until*.

To generate the given report once, select **Run once**.

Repeat until

This setting is available only for the *Daily* recurrence pattern. It specifies until what time periodic updates for the given report shall be generated. It should normally be used with the *Time frame* parameter set to *Today*.

Days of the week

These checkbox settings are available only for the *Weekly* recurrence pattern. Use them to specify the day(s) of the week when the given report will be generated.

Run on

This setting is available only for the *Monthly* recurrence pattern. Use it to specify the day of the month when the given report will be generated.

Time frame

Select the desired reporting time frame. For example, if it is your practice to start your day with reviewing results of the previous day, select the *Yesterday* time frame, set recurrence to *Daily*, set *Run at* to *3:00 AM*, and set *Repeat every* to *Run once*.

To request a report for a specific time interval within a day, select a day time frame (*Today* and *Yesterday*) and use the *From* and *To* fields to specify the desired interval. This may be convenient if you need to get separate reports for different contact center shifts. To get a report for a shift that begins before, and ends after, midnight, select time frame *Yesterday*, and set the desired start time in the *From* field and the desired end time in the *To* field (you will see *+1 day* next to the hours as an indicator that it is an overnight shift).

To request a multi-day report of an arbitrary duration, set the time frame to *Last N days* and specify the desired number of days. Note that this option lets you obtain a weekly report on any 7-day cycle, as opposed to a calendar week.

Time interval

This setting is available only for a subset of the reports that compare metrics over time (i.e., over a number of subintervals within the specified *Time frame*). For example, a daily Disposition in Time report can be requested with an hourly or 30-minute breakdown. Use this setting to select the desired subinterval length.

Agents

For agent report templates, you can select the agent(s) that will be included in the generated reports.

Teams

For team report templates, you can select the team(s) that will be included in the generated reports.

Scenarios

For scenario report templates, you can select the scenario(s) that will be included in the generated reports.

Services

For service report templates, you can select the service(s) that will be included in the generated reports.

Email Delivery tab

Deliver report via email

Select this checkbox if the reports generated according to this schedule shall be delivered as email attachments.

Note that the corresponding SMTP settings must be configured on the [Email Settings > SMTP Configuration](#) page.

Sender display name

Specify the name that will appear in the *From* field of the emails with report attachments.

Sender email address

Specify the email address that will appear in the *From* field of the emails with report attachments.

Subject

Specify the text that will appear in the *Subject* field of the emails with report attachments.

Message

Specify the text that will appear in the body of the emails with report attachments.

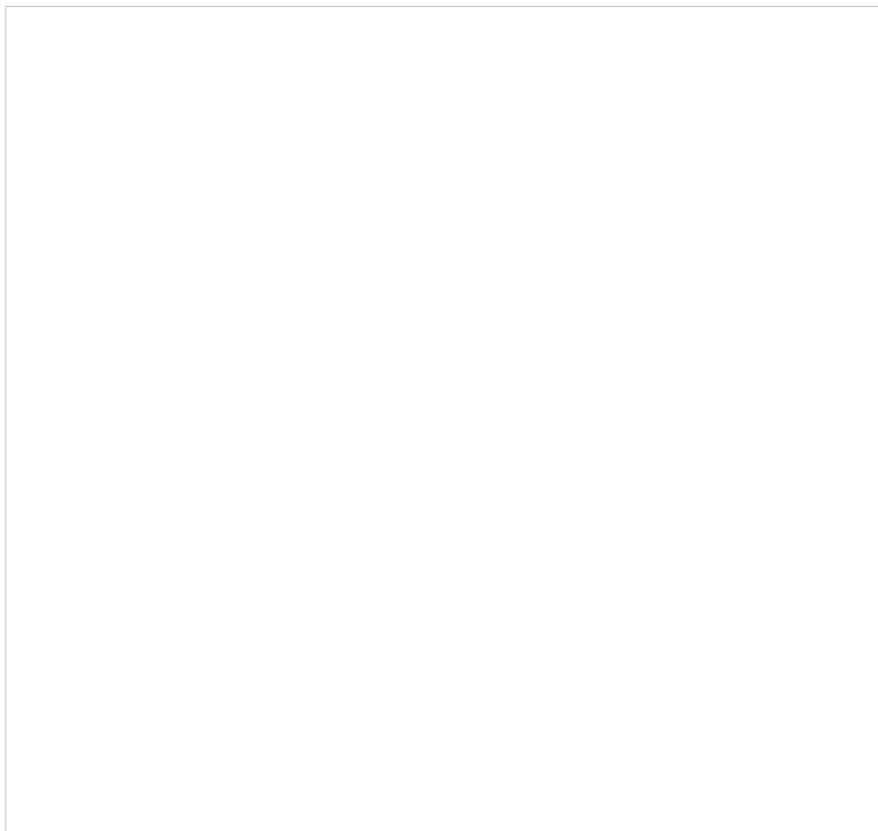
Format

Select the format of the report attachment (i.e., PDF, Excel, CSV, Text).

Recipients

Click **edit** to select one or more email recipients. Note that a report recipient must be registered as a user in the contact center configuration and must have an email address specified in his profile. See section *Users* for more information.

FTP Delivery tab



FTP Delivery tab properties

Deliver report via FTP/SFTP

Select this checkbox if the reports generated according to this schedule shall be delivered via a file transfer protocol.

Format

Select the format of the report file: PDF, Excel, CSV, or text.

Transport Protocol

Select the type (i.e., FTP or SFTP) of the transfer protocol to be used for report file delivery.

FTP/SFTP Server hostname

Enter the *FTP/SFTP Server hostname* (e.g., "cust.anyftp.com").

Destination folder and file name

Specify the address of the destination folder and file name (e.g., *50Reports/Report_%d_%t.csv* where *50Reports* is the destination folder and *Report_%d_%t.csv* is the file name).

Note that in your scheduled report, you can add date (%d) and time (%t) placeholders to the specified filename. For example, specifying filename *Report_%d_%t.csv* results in a scheduled report with a filename such as *Report_20180521_113000* where *20180521* represents the date "May 21, 2018" and *113000* represents the time "11:30:00" that the report was generated.

FTP username

Specify the FTP username (e.g., "1250bayhill@gmail.com").

FTP password

Specify the FTP password.

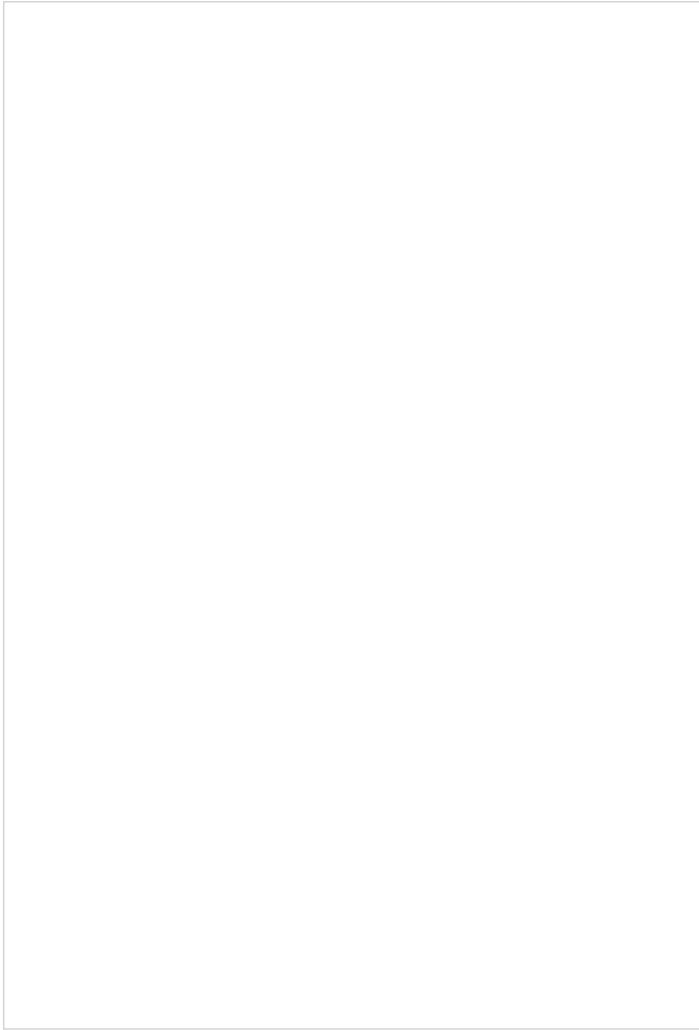
1. REDIRECT [5.3:Contact-center-administrator-guide/Scenarios/Chat](#)
1. REDIRECT [5.3:Contact-center-administrator-guide/ServicesandCampaigns/EmailTab](#)
1. REDIRECT [5.3:Contact-center-administrator-guide/CallCenterConfiguration/KnowledgeBase](#)

1. REDIRECT [5.3:Contact-center-administrator-guide/CallCenterConfiguration/LanguageSkills](#)
1. REDIRECT [5.3:Contact-center-administrator-guide/CallCenterConfiguration/KnowledgeBase](#)
1. REDIRECT [5.3:Contact-center-administrator-guide/ScenarioEntries/Email](#)

Messaging/Chat

Messaging/Chat scenario entries are used to associate [scenarios](#) with contacts requested via mobile and web applications.

To set up and manage such associations, select the **Messaging/Chat** option from the *Scenario Entries* menu.



Scenario Entries > Messaging/Chat

Messaging/Chat Scenario Entries Screen Properties

The *Messaging/Chat Scenario Entries* screen properties are described as follows.

Name

Name is the name of this messaging/chat scenario entry. This field is mandatory and must be unique within the contact center.

Unique identifier

The *Unique identifier* is generated by the system for this scenario entry. This identifier must be used as *Application ID* in the mobile and/or web applications that will connect to your contact center via this scenario entry. For more information, see section [General Information](#) of the Bright Pattern *Mobile/Web API Specification*.

Scenario

Scenario is the [Chat scenario](#) that will process chat requests arriving via this entry point.

Service

This is the *service* associated with this scenario entry. Entering a service is optional. See the corresponding description for the [Dial-in](#) scenario entries for more information.

Default service for voice callback

Select the voice service to be used when a customer requests a voice callback during a mobile or web chat interaction. The *Default service for voice callback* drop-down menu displays the voice services that have been added to [Services & Campaigns](#).

Hours of Operation

Hours of Operation (HOP) refers to the schedule for this scenario entry point. This field is optional. See the corresponding description for the [Dial-in](#) scenario entries for more information.

Web HTML snippet

Web HTML snippet provides access to the web elements of the chat application that customers will use to access your contact center via the given scenario entry.

You can either use an out-of-the-box chat application hosted by your service provider, or you can create your own application.

To use the out-of-the-box application, click the **HTML snippet** button, **copy** the HTML snippet code, and embed it into your web page(s). Normally, it is not necessary to change the default **client web server hostname**. You will do so only if instructed by your service provider.

To create your own application with the full chat code, click the **Client application** button. A zip file with the code of the out-of-the-box application (see above) will be downloaded to your computer. You can modify this code to match the look and feel of your company website, and implement additional application functionality using the [Mobile/Web API](#).

Requested skills

Requested skills are the [auxiliary skills](#) and [language skills](#) that the agents must possess in order to handle chats arriving through this scenario entry. This field is optional. See the corresponding description for the [Dial-in](#) scenario entries for more information.

Parameter expected

A *parameter expected* is the parameter that may be expected by the scenario in session requests coming from the mobile applications (e.g., customer's name). Such parameters are optional. They may be used, for example, to look for the most qualified agents to handle the requested chat sessions and/or to display user information for the agents. For more information, see section [Expected parameters](#) of the *Mobile/Web API Specification*.

To define a new parameter, click **add**, select the parameter type, and specify its name. To edit or remove existing parameters, hover over their names.

SMS/MMS access numbers

Bright Pattern Contact Center enables customers to request and carry on chat conversations via SMS or multimedia messaging service (MMS). Such chat requests are initially made to a dedicated access number. Subsequent treatment of such requests, including routing, Agent Desktop, and reporting, is no different from the processing of regular chat sessions.

Use this setting to specify the number that the customers will use to initiate such SMS/MMS chat conversations. Note that this must be an enabled access number assigned to you by the service provider and dedicated to SMS/MMS communications (i.e., an access number that appears in the *[number]/SMS/MMS* format in the [Access Numbers](#) list view).

You can assign more than one access number to one scenario entry, but the same number cannot be assigned to multiple entries.

Messenger Accounts

Agents can participate in live chats initiated from a customer's messenger account (e.g., Facebook Messenger, LINE, Telegram, Viber, etc.). Messenger integration accounts that are configured for your call center can be selected from the *Messenger accounts* drop-down menu. To add a messenger account to your Messaging/Chat scenario entry, click **add** and select the desired account.

Bot / Chat suggestions engine

Our system integrates with chat bots to provide meaningful suggestions to an agent during chat session, as well as bot functionality for customers to complete self-service tasks without the assistance of a live agent. From the *Bot / Chat suggestions engine* drop-down menu, you can select one *bot / chat suggestion engine* integration account as a suggestion engine per service. One such integration account can be selected as chat bot on the chat service launch point. The default engine is *None*.

Note that selecting a suggestions engine here will override suggestions engine selections made in the scenario associated with this scenario entry. For more information, see the *Scenario Builder Reference Guide*, section [Chat Bot Select Account](#).

Enable co-browsing

When enabled, this option allows an agent and a customer to navigate the same web resource at the same time during a chat session.

Co-browsing account

When [co-browsing](#) is enabled, you may choose the method by which agents will co-browse with customers during chat sessions. You may choose from the list of available integration accounts (e.g., Surfly) or the built-in Bright Pattern Contact Center version, TogetherJS.

Connect agent by phone automatically

Any mobile application contact is initially presented to the agent as a chat request. However, if the mobile application transmits the customer's mobile phone number, this number will be displayed at the Agent Desktop, and the agent can call the number to establish a voice call with the customer. Select the *Connect agent by phone automatically* checkbox if you wish for such voice calls to be initiated automatically whenever the phone number is available.

Connect after delay of

If you selected the *Connect agent by phone automatically* checkbox, you can define how quickly the automated call to the customer mobile number will be initiated. A slight delay may be desirable if, for example, the agent needs some time to review information that comes with the original request.

Queuing priority

Queuing priority is the priority of interactions arriving through this scenario entry. This field is optional. See the corresponding description for the [Dial-in](#) scenario entries for more information.

Chat nick for system messages

Chat nick for system messages is the name that will be displayed to the customers when they get automated chat responses through this scenario entry (e.g., during an initial data collection stage). By default, this is the name of your contact center (tenant name) that is defined at the service provider level.

How long an agent could wait for reply before chat times out

This is the amount of time (in minutes) that an agent could wait for a reply before the chat interaction expires. It can be redefined for each Messaging/Chat scenario entry separately.

This setting overrides the [Customer Inactivity Timeout](#) setting.

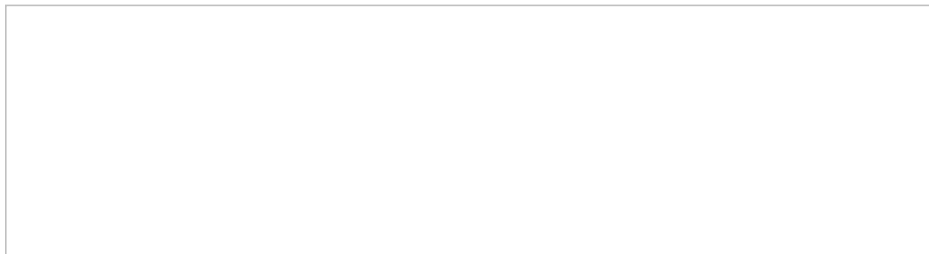
How long a client browser may stay unresponsive before chat times out

This is the amount of time (in minutes) that the client's browser may stay unresponsive before the chat interaction expires.

Visible to agents

Visible to agents indicates whether this scenario entry shall appear in the Agent Desktop directory. See the corresponding description for the [Dial-in](#) scenario entries for more information.

Checking this box enables agents to transfer chats to another chat directory. In order to be able to transfer chats to another chat scenario, the Messaging/Chat scenario entry must be updated to be visible to agents and have a directory that is named for the transfer. For more information on how agents transfer chats, see the *Agent Guide*, section [How to Transfer Your Chat Session](#).



Check "Visible to agents" and add directory to enable agent chat transfer

Directory folder

Directory folder is the folder of the Agent Desktop directory where this scenario entry will appear if enabled by the previous option. See the corresponding description for the [Dial-in](#) scenario entries for more information.

Scenario parameters

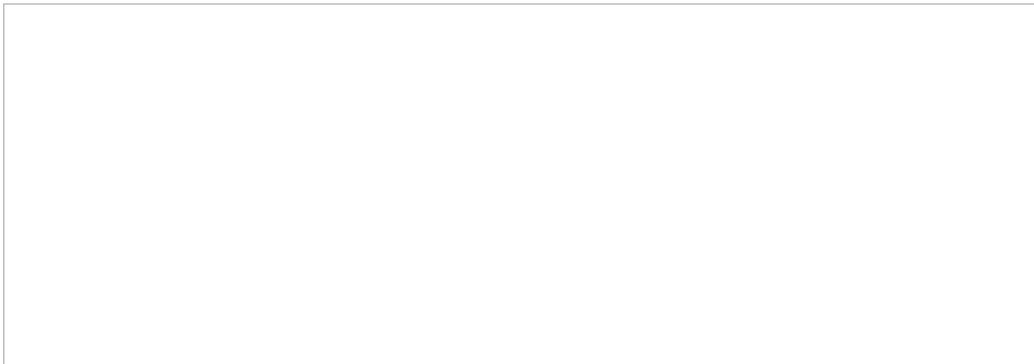
Scenario parameters are optional. See the corresponding description for the [Dial-in](#) scenario entries for more information.

Chat session icon

The *chat session icon* appears in the customer-facing chat window during active chat sessions. You have the option of uploading an icon (e.g., logo, photo, etc.) on a system-wide level, which will be seen in chat windows for all customers interacting with agents in your tenant. If uploaded, this icon overrides photos that agents have uploaded to their [User Profile](#) in the Agent Desktop application, which are normally seen by customers in their active chat windows.

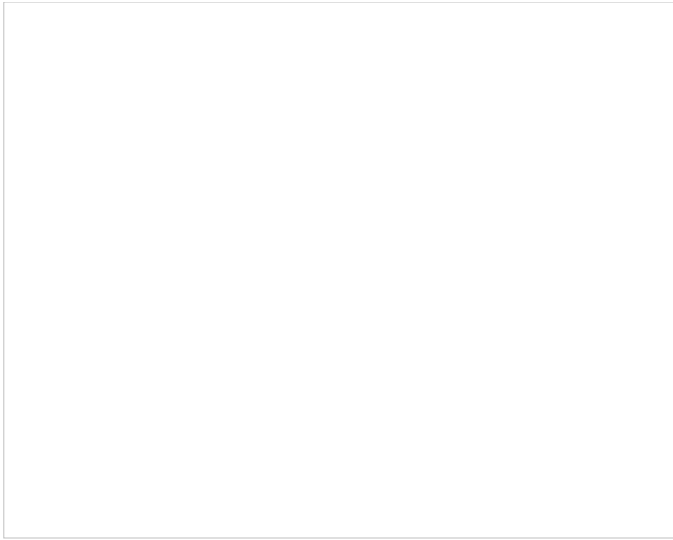
Leaving this field empty or removing a chat session icon allows chat windows to display the photo that an agent has uploaded to his or her *User Profile* (if available).

For example, agent Christy Borden has uploaded a photo to her *User Profile*, as shown. The agent's uploaded photo appears in the customer's active chat window.



Agents can upload photos or icons to their User Profiles in Agent Desktop

Uploading a chat session icon causes the agent's photo in the chat window to be replaced by the icon that you uploaded. Note that you must click **Apply** to save your changes. Also note that the chat session icon that you upload does not override agents' *User Profile* photos--only the display photos shown in active chat windows.



To upload a chat session icon, click Upload and then click Apply

In all new chat interactions, the customer's chat window will display the chat session icon that you have uploaded. In addition, web notifications that pop on agent replies when the visitor's browser window with chat is minimized, or overlapped by other windows, will also contain the chat session icon for all agents.

Co-browsing

During a web chat, co-browsing functionality allows the agent to view the customer's screen and follow the customer's scrolling movements. Co-browsing is initiated during the chat when the customer--not the agent--clicks the co-browsing icon. Screen sharing ends when either the customer clicks the icon or when the chat is terminated. For more information, see the *Agent Guide*, section [Co-browsing](#).

Chat widget

The *chat widget* provides access to the web elements of the chat application that customers will use to access your contact center via the given scenario entry. The chat widget may be customized for color, size, fonts, font size, display elements, and more.

To edit the chat widget, click **customize** and the Chat Widget Configuration window will open. For step-by-step instructions explaining how to configure your chat widget, including [chat widget auto-start](#), see section [Web Chat Configuration](#)

For additional information, see the [Chat Widget Configuration Guide](#).

Chat transcript template

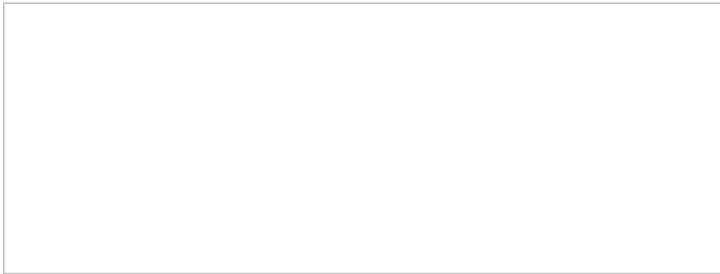
The *chat transcript template* allows you to configure an email template for the purpose of sending chat/messaging transcripts. Note that this chat transcript template is specific to the given Messaging/Chat Scenario Entry; if the template is not defined, the [template defined at the system level](#) will be used.

In order for transcripts to be emailed, you will need the following:

- **A configured SMTP server** - In order for the system to automatically send emails, you will need complete [SMTP Configuration](#).
- **A configured [pre-chat form](#) with an email field** - Transcripts are emailed to the address(es) specified in fields

containing the variable [\\$\(item.email\)](#) when the session ends.

- **A chat scenario containing [\\$\(item.sendTranscript\)](#)** - In the corresponding chat scenario, you must include a [Set Variable](#) scenario block with the variable [\\$\(item.sendTranscript\)](#); the value must be set to **1** in order for the transcript to send.



Set Variable block with the variable [\\$\(item.sendTranscript\)](#)

When configuring the settings in this section, you will need the following:

- **A sender display name**
- **A sender email address**
- **The chat transcript variable** - When configuring the template message, you must include the variable [\\$\(CHAT_TRANSCRIPT\)](#). This variable inserts the transcript into the message.

Email Settings

This menu contains various settings related to email communications. Note that in addition to customer interactions, email in Bright Pattern Contact Center is used for various auxiliary tasks, such as sending transcripts of chat sessions, password reset instructions, scheduled reports, and voicemail audio files.

To configure email settings, select **Email Settings** from the Call Center Configuration menu.

Note the following:

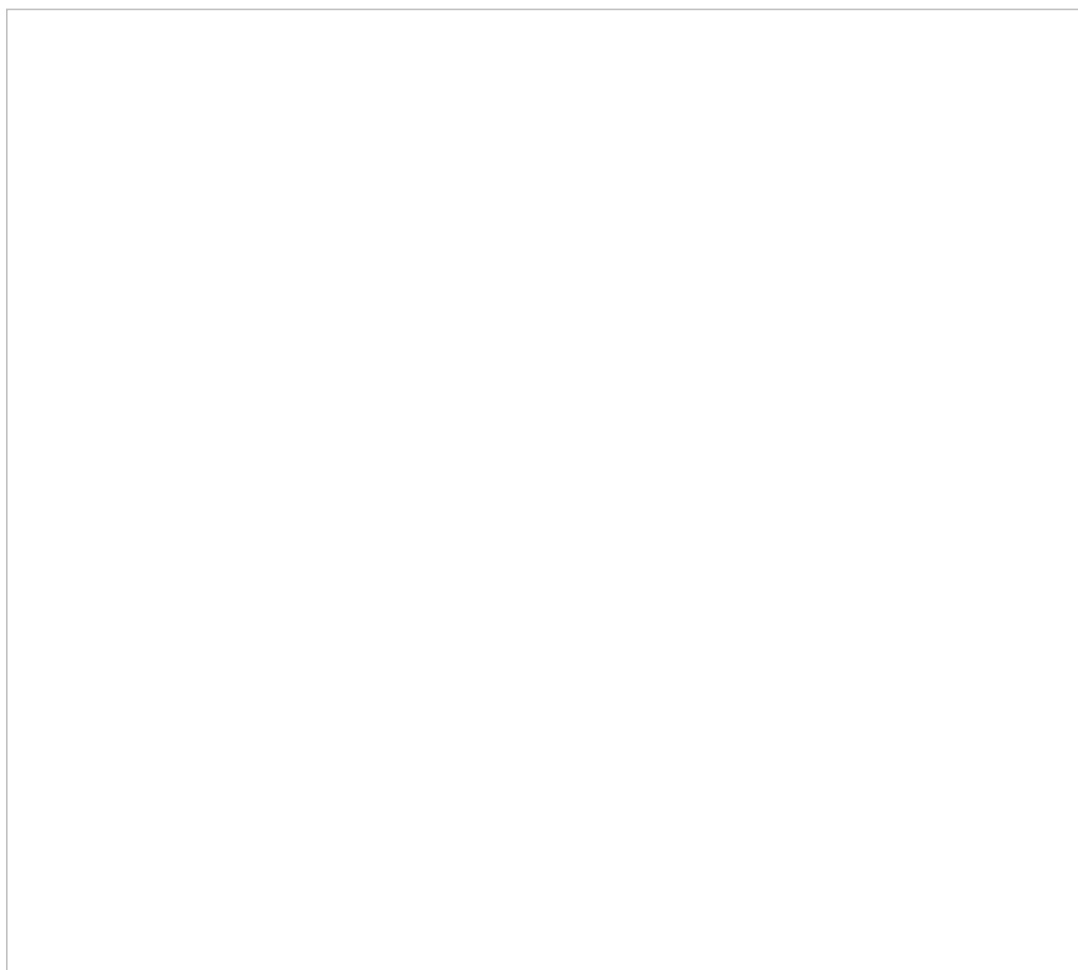
- Except for the SMTP settings, configuring the system to send voicemail attachments is done via scenarios. For more information, see section [Voicemail](#) of this guide and description of the [Voicemail](#) block in the *Scenario Builder Reference Guide*.
- Except for the SMTP settings, configuring the system to send reports via email is done via the [Scheduled Reports](#) page.
- Except for the SMTP settings and chat transcript template, configuring the system to email chat transcripts is done via scenarios. Note that the *E-Mail* scenario block is not used for this purpose. Rather, sending a chat transcript email is triggered by setting variable [\\$\(item.sendTranscript\)](#) to **1** in the chat scenario. You can see an example of such configuration in the *Support Chat* [scenario template](#).

Email Header and Footer

This section relates to customer email interactions and lets you define mandatory standard messages that will be inserted above (the header) and/or below (the footer) the main text of each email that is sent to a customer. Some examples of such messages are references to case numbers, legal disclaimers, and a company's contact information. Headers and footers are not applied to [acknowledgements](#) (initial automatic replies sent to acknowledge receipt of incoming mail).

Note: The headers and footers configured here will be applied to all emails sent from your contact center regardless of the service. For service-specific email templates, default [Knowledge Base](#) articles should be used.

To configure these elements, select option **Email Header and Footer** from the *Email Settings* menu.



Email Settings > Email Header and Footer

Header and Footer Screen Properties

The *Email Header and Footer* screen properties are described as follows.

Language

The *Language* setting is where you select the language of the header and footer message. Note that you can define the header and footer in multiple languages. The system will automatically insert the version corresponding to the language of the main text of the email.

Please note: The languages listed here differ from those found in [Language Skills](#); only auto-detectable languages are available to select from this menu.

Header

Type the text of the message that should appear in the *Header* field, above the main text of all emails sent to customers.

Footer

Type the text of the message that should appear in the *Footer* field, below the main text of all emails sent to customers.

Insert \$()

This setting specifies the menu of substitution fields that can be inserted in the header and footer messages. Except for *\$(cursor)*, these are the same [substitution fields](#) that are used in Knowledge Base articles.

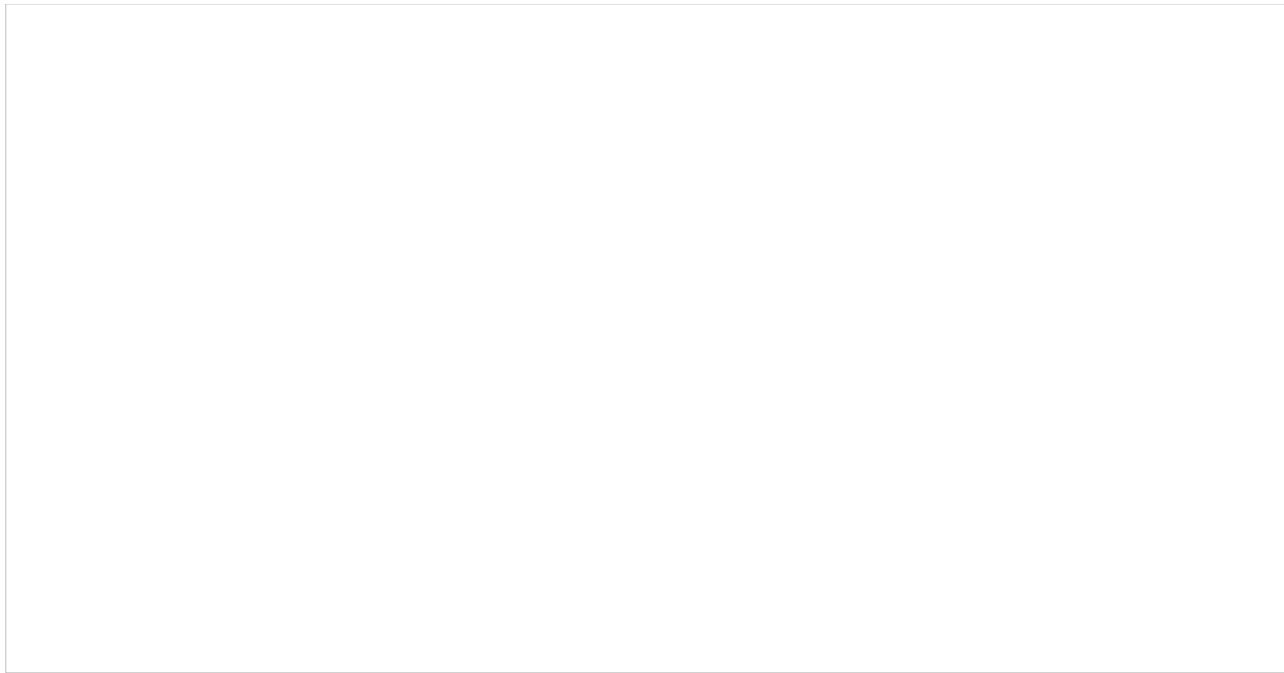
Remove

Use the *Remove* button to remove the header and footer in the selected language.

SMTP Configuration

This section contains settings for connection to the SMTP server used for auxiliary email communications, including transcripts of chat sessions, password reset instructions, scheduled reports, and voicemail audio files. Note that this section is not used to configure SMTP for the outbound email interactions with customers. For the latter, [email scenario entries](#) are used.

To configure SMTP connection settings, select **SMTP Configuration** from the **Email Settings** menu.



Email Settings > SMTP Configuration

SMTP Configuration Screen Properties

The *Email SMTP Configuration* screen properties are described as follows.

System sender display name

Sender display name is the name that will appear in the *From* field of the emails with password reset instructions.

System sender email address

This is the email address that will appear in the *From* field of the emails with password reset instructions.

SMTP server hostname

SMTP server hostname specifies the SMTP server host name.

SMTP server port

SMTP server port specifies the SMTP server port.

Connection security

Connection security indicates whether a cryptographic protocol (TLS or SSL) will be used to secure this connection.

- For a nonsecure connection, select **none**.
- To negotiate encryption in a plain connection, select **negotiate encryption in a plain connection (STARTTLS)**.
- For an immediate secure connection, select **use an encrypted connection (TLS/SSL v3)**.

Server requires authentication

This setting indicates whether client authentication is required for the SMTP server.

Username

Username is the user name for SMTP client authentication. This user name must be specified if the *Server requires authentication* option is selected.

Password

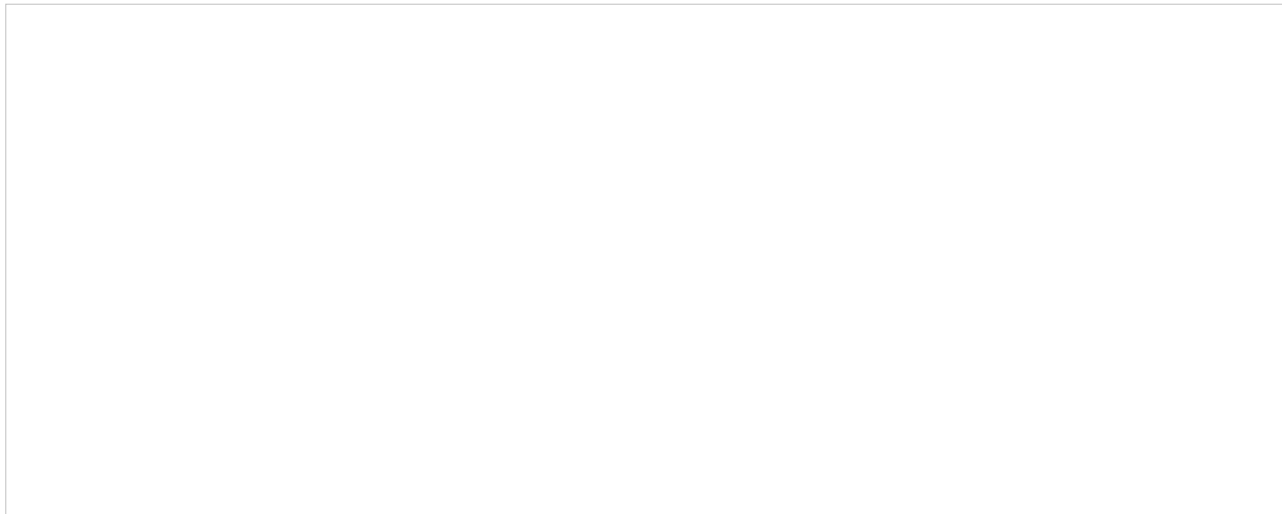
Password is the password for SMTP client authentication. The password must be specified if the *Server requires authentication* option is selected.

Check settings

Use the *Check settings* button to verify the correctness of your SMTP settings.

Password Recovery Template

To configure a template for password reset instructions, select **Password Recovery Template** from the *Email Settings* menu.



Email Settings > Password Recovery Template

Password Recovery Template Screen Properties

The *Password Recovery Template* screen properties are described as follows.

Subject

This setting specifies the text that will appear in the *Subject* field of the emails with password reset instructions.

Message

This setting specifies the text that will appear in the body of the emails with password reset instructions.

You can use the following variables in this text:

- *\$(FIRST)* for the first name of the email recipient

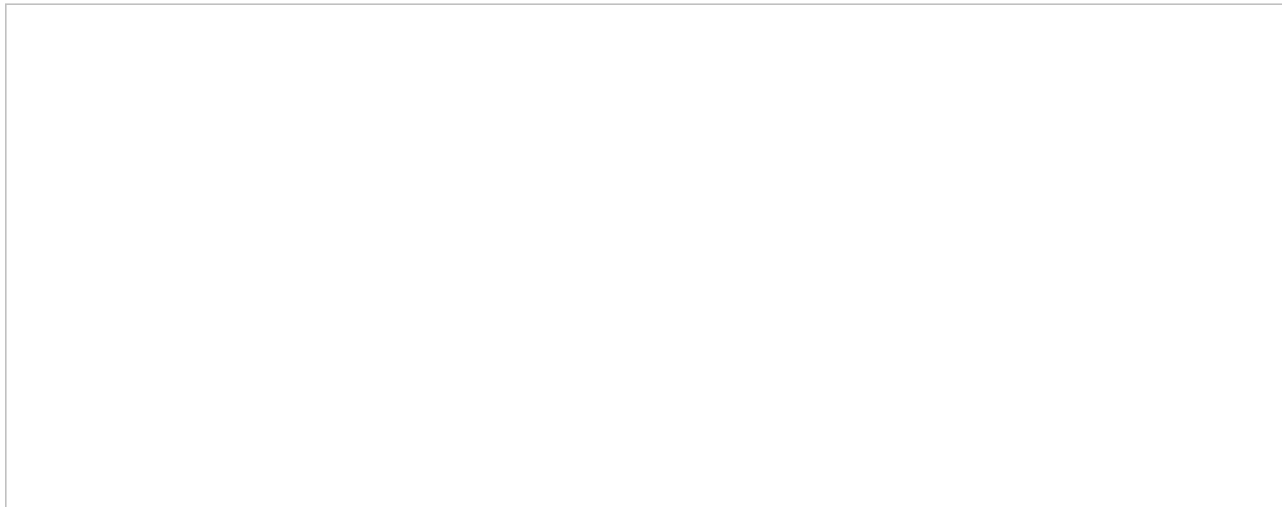
- *\$(LAST)* for the last name of the email recipient
- *\$(LOGIN)* for recipient's username
- *\$(LINK)* as a placeholder for password recovery link

Chat Transcript Template

To configure a system-wide template for chat transcripts, select **Chat Transcript Template** from the *Email Settings* menu. Note that it is possible to configure chat transcript templates per [Scenario Entry](#).

In order for transcripts to be emailed, you will need the following:

- **A configured SMTP server** - In order for the system to automatically send emails, you will need complete [SMTP Configuration](#).
- **A configured [pre-chat form](#) with an email field** - Transcripts are emailed to the address(es) specified in fields containing the variable [\\$\(item.email\)](#) when the session ends.
- **A chat scenario containing [\\$\(item.sendTranscript\)](#)** - In the corresponding chat scenario, you must include a [Set Variable](#) scenario block with the variable [\\$\(item.sendTranscript\)](#); the value must be set to **1** in order for the transcript to send.



Email Settings > Chat Transcript Template

Chat Transcript Template Screen Properties

The *Chat Transcript Template* screen properties are described as follows.

System sender display name

This is the name that will appear in the *From* field of the emails with chat transcripts. This setting is mandatory for sending emails with chat transcripts.

System sender email address

The *Sender email address* will appear in the *From* field of the emails with chat transcripts. This setting is mandatory for sending emails with chat transcripts.

Subject

This setting specifies the text that will appear in the *Subject* field of the emails with chat transcripts.

Message

This setting specifies the text that will appear in the body of the emails with chat transcripts.

You can use the following variables in this text:

- *\$(FIRST)* for the first name of the email recipient
- *\$(LAST)* for the last name of the email recipient
- *\$(LOGIN)* for recipient's username
- *\$(CHAT_TRANSCRIPT)* for chat transcript
- *\$(TENANT_NAME)* for your business name as it is registered with your service provider

Chat Initiation via Contact Tabs

Any visitor to your site can start a web chat by clicking on the chat widget's Contact tab. When customizing your chat widget, you have the option of requesting that visitors fill out a Pre-Chat form or a Leave a Message form. The properties of the Contact tab and these forms are described in this section.

Contact Tab

The Contact tab is what visitors to your website click in order to initiate a web chat. In the Chat Widget Configuration application, you can define the location, style, and color of this tab as it will appear on your site.



Contact tab properties and preview

Properties

The following properties determine the color, placement, and text of the chat widget's Contact tab.

Enabled

If the *Enabled* checkbox is selected, the Contact Tab will be shown on the chat widget.

Location

Location is where the chat widget will be placed on your webpage:

- top_left
- top_middle
- top_right
- right_top
- right_middle
- right_bottom
- bottom_left
- bottom_middle
- bottom_right
- left_top
- left_middle
- left_bottom

Icon URL

The *Icon URL* is the web address of your company icon or logo. In the Icon URL field, enter the desired icon's URL to see it shown on the left side of the Contact tab.

Text when in hours - chat with us

This is the text shown when the chat widget is clicked during your company's hours of operation. Enter the desired text to be displayed on the widget when agents are available to chat (e.g., "Chat with us!" or "Click to chat.").

Text when after hours - leave us a message

This is the text shown when the chat widget is clicked outside of your company's hours of operation (e.g., "Leave us a message.").

Do not show after hours

When this checkbox is selected, the chat widget is not displayed outside of your contact center's hours of operation.

Do not show

Select this checkbox when the chat widget should be hidden from view when the estimated wait time exceeds a certain threshold (see *Enter the estimated wait time threshold in seconds* below).

Enter the estimated wait time threshold in seconds

Enter the maximum estimated wait time (EST) that is allowed to elapse before the chat widget is hidden from view.



An example of a contact tab
as seen by a customer

Pre-Chat Form Configuration

Pre-chat forms are shown to customers when they first click the chat contact tab (i.e., the small tab that displays text such as, "Chat with us! We are online") to initiate a web chat. These forms collect data from the customer. By editing the pre-chat form properties, you can customize the fields that customers will fill in (e.g., phone number, email, reason for chat, etc.).



Pre-Chat Form Configuration properties and preview

Properties

The following properties determine the fields and text shown on the chat widget's Pre-Chat form.

Enabled

If the *Enabled* checkbox is selected, the Pre-Chat form will be shown on the chat widget.

Title

Title is the unique name of the form. The title is displayed at the top of the form for customers to see.

Contact options

Chat tab and button enabled

When this checkbox is selected, the Pre-Chat form displays the Chat tab at the top of the form. Customers click the Chat tab to enter information (as specified in the fields below) before the chat interaction begins.

Chat tab and button text

Chat tab and button text is the text that will be shown on the Chat tab, if the Chat tab and button are enabled.

Phone call button enabled

When this checkbox is selected, the Pre-Chat form displays the *Call* tab at the top of the form and the *Call* button at the bottom of the form. When the customer enters information on the form and clicks the **Call** button, the agent accepts a chat and can call the customer's provided phone number using the **Initiate call** button.

Phone call button text

Phone call button text is the text that will be shown on the Call tab, if the Phone call button is enabled.

Cancel button enabled

When this checkbox is selected, the Pre-Chat form displays the Cancel button at the bottom of the form. Customers wishing to close a filled-out form may click the Cancel button.

Cancel button text

Cancel button text is the text shown on the button to cancel the chat or phone call.

Fields - common

Specify here the fields that should appear on both Chat and Phone tabs of this form; some fields are included by default - you can edit and/or delete these fields and add new ones.

The following form field types and labels are included:

- Label: First name
- Text: first_name
- Label: Last name
- Text: last_name
- Label: E-mail
- Text: email

For more information, see sections [Working with Form Fields](#).

Fields - phone

Specify here the fields that should appear on both Chat and Phone tabs of this form; some fields are included by default - you can edit and/or delete these fields and add new ones.

The following phone field types and labels are included:

- Label: Phone
- Callback phone number: phone_number

For more information, see sections [Working with Form Fields](#).

Fields - chat

Specify here the fields that should appear on both Chat and Phone tabs of this form; some fields are included by default - you can edit and/or delete these fields and add new ones.

The following chat field types and labels are included:

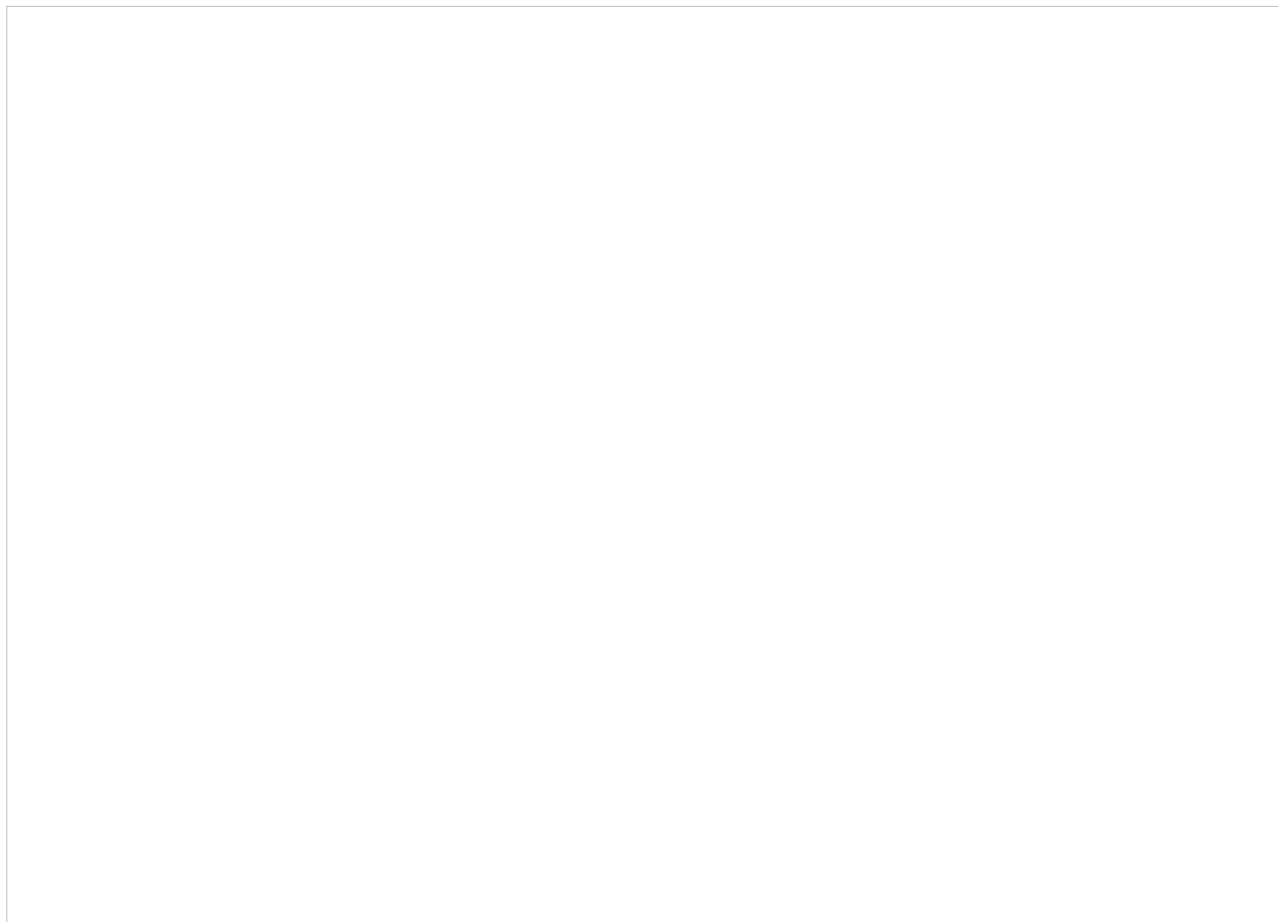
- Label: Message
- Multiline text: message

For more information, see sections [Working with Form Fields](#).

Leave a Message Form Configuration

The Leave a Message form is given to customers who try to initiate a web chat outside of business hours or when no agents are available. The form allows customers to provide a detailed message for your contact center when they are unable to chat with an agent.

You can specify the fields that should appear on both Chat and Phone tabs of this form; note that some fields are included by default.



Leave a Message Form Configuration properties and preview

Properties

The following properties determine the fields and text shown on the chat widget's Leave a Message form.

Title

Title is the unique name of the form. The title is displayed at the top of the form for customers to see.

Email to send form to

This is the email address of the person that will receive the form/message.

OK button text

The *OK button text* is what will be shown on the button to send the form/message.

Cancel button text

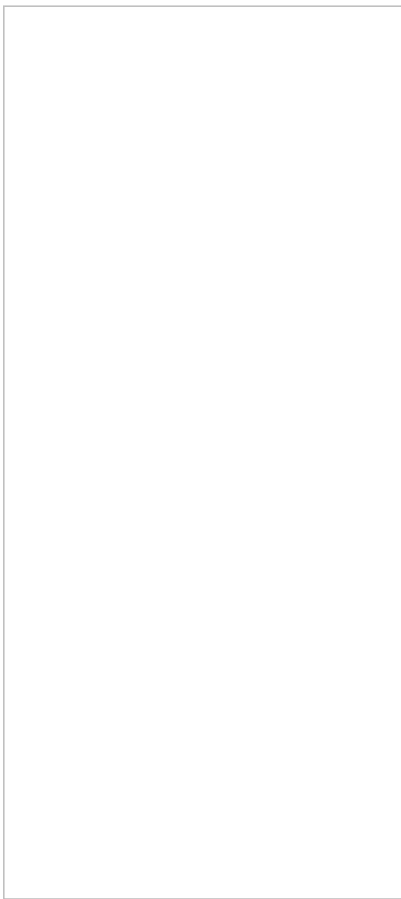
Cancel button text is the text shown on the button to cancel the message.

Fields - chat

The following chat field types and labels are included:

- Name: subject
- Label: Subject
- Label: Description

For more information, see section [Working with Form Fields](#).



An example of a Leave a Message form as seen by the customer

Set Variable

This block sets a value for a scenario variable.

Note it is possible to push variables directly to scenarios and [workflows](#) if the JavaScript API method [postVariable](#) is enabled.

Set Variable block

Settings

Variable name

This is the name of the variable. The *Variable name* can be set to be anything you like.

Value

The *Value* is the desired variable value. In the example image shown, the value is `$(targetDisconnectedCause)`, which is being used as a conditional exit in the scenario.

[Variables](#) in the `$(varname)` format can be used as values. Values can be specified as either expressions or literal [scenario-builder-reference-guide/StringExpressions|strings]]. Literal strings are passed exactly as entered.

[Expressions](#) must begin with assignment sign `=` as the first character. For example, `2+2` will produce `2+2`, whereas `=2+2` will produce `4`. The expression result produces one of the following data types: [strings](#), [integers](#), and [floating point numbers](#).

Editing the Set Variable settings