

5.3 Chat

Bright Pattern Documentation

Generated: 11/27/2021 6:16 pm

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Chat Tutorials Overview

Chat tutorials show you how to enable chat/messaging capabilities for your contact center. You will learn how to set up chat services, place Bright Pattern's chat widget on your website, and more.

Tutorials

Configuration

- [How to Add a Contact Tab](#)
- [How to Configure Chat Services](#)
- [How to Configure Web Chat](#)

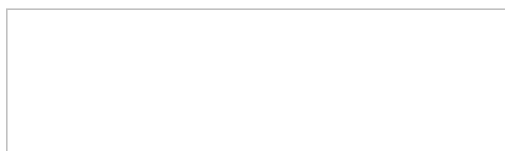
Launching Chat on Webpages

- [How to Use the Chat Widget HTML Snippet](#)

How to Add a Contact Tab

After you have edited all the properties for a chat scenario entry, there is one last step you must take for your web chat to work: You must add a contact tab for the chat widget.

A *contact tab* is the small tab that a customer browsing your website sees and clicks to initiate a chat interaction. If you do not add a contact tab to your chat scenario entry, your webpage will not display the chat widget at all.

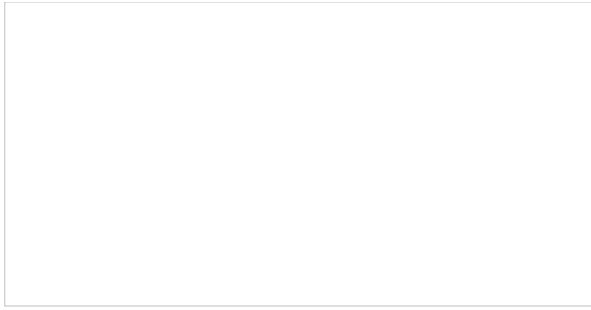


Example contact tab

Procedure

Step 1: Find the Chat widget tab

1. In Contact Center Administrator, go to *Configuration > Scenario Entries > Messaging/Chat*.

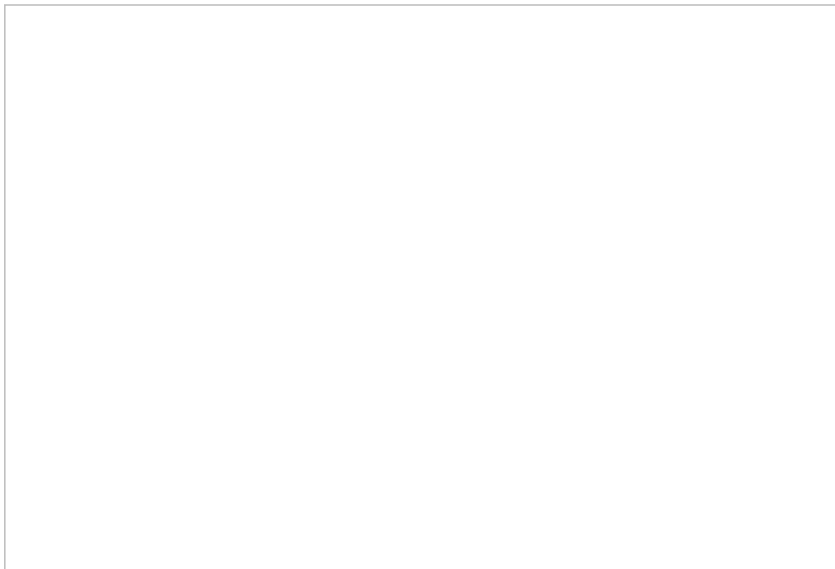


Configuration > Scenario Entries >
Messaging/Chat

2. Select the desired chat scenario entry.
3. Click on the *Chat widget* tab.

Step 2: Add a new contact tab

1. Beneath *Chat Initiation via Contact Tabs*, click **add**.



Add a new contact tab

2. The Chat Widget Configuration editor will open in a new browser tab or window.

Step 3: Edit contact tab properties

Edit the [properties](#) and fields as desired. You may revisit and edit your contact tab properties at any time.



Chat Widget Configuration editor in new browser tab/window

At the most basic level, only two properties must be completed right now:

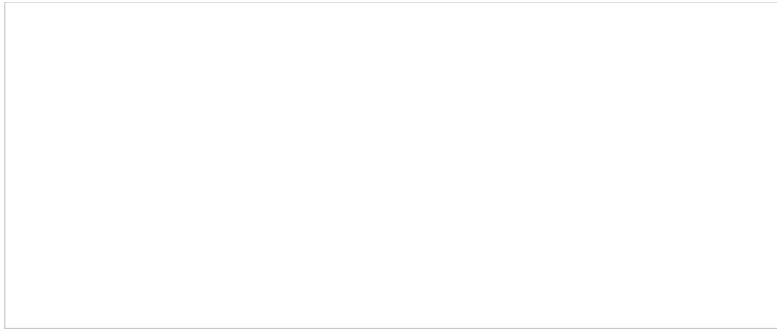
- **Name** - The unique name (any) for this new contact tab
- **Enabled** - Selecting this checkbox turns on the contact tab

Step 4: Save your changes

1. Click **Save** to save your contact tab. Simply closing the browser window will not save your changes.
2. Close the Chat Configuration Editor browser tab or window. You can only work on one such editor window open at a time.

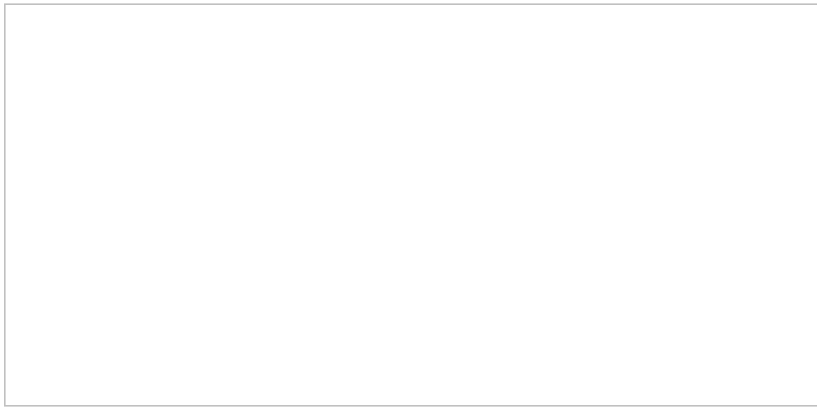
Step 5: Add url

1. Back in the scenario entry's *Chat widget tab*, go to *Chat Initiation via Contact Tabs*.
2. Beneath the contact tab you just added, click **add url**.



Make sure you add the URL of your webpage

3. Enter the URL of the website where the chat widget will be placed, and click the green checkmark to apply your changes. If you do not know the URL, you can simply enter backslash (/) in this field.



Apply changes or cancel

Step 6: Save

At this time, you may add or edit any of the other *Chat widget* tab sections. You can always come back to this for further changes.

At the bottom of the screen, click **Apply** to save your changes.

Chat Service Configuration

This article describes how to configure a general chat service within Bright Pattern's Contact Center Administrator application.

Prerequisites

This article assumes that you have already completed [initial configuration](#) for your contact center.

Procedure

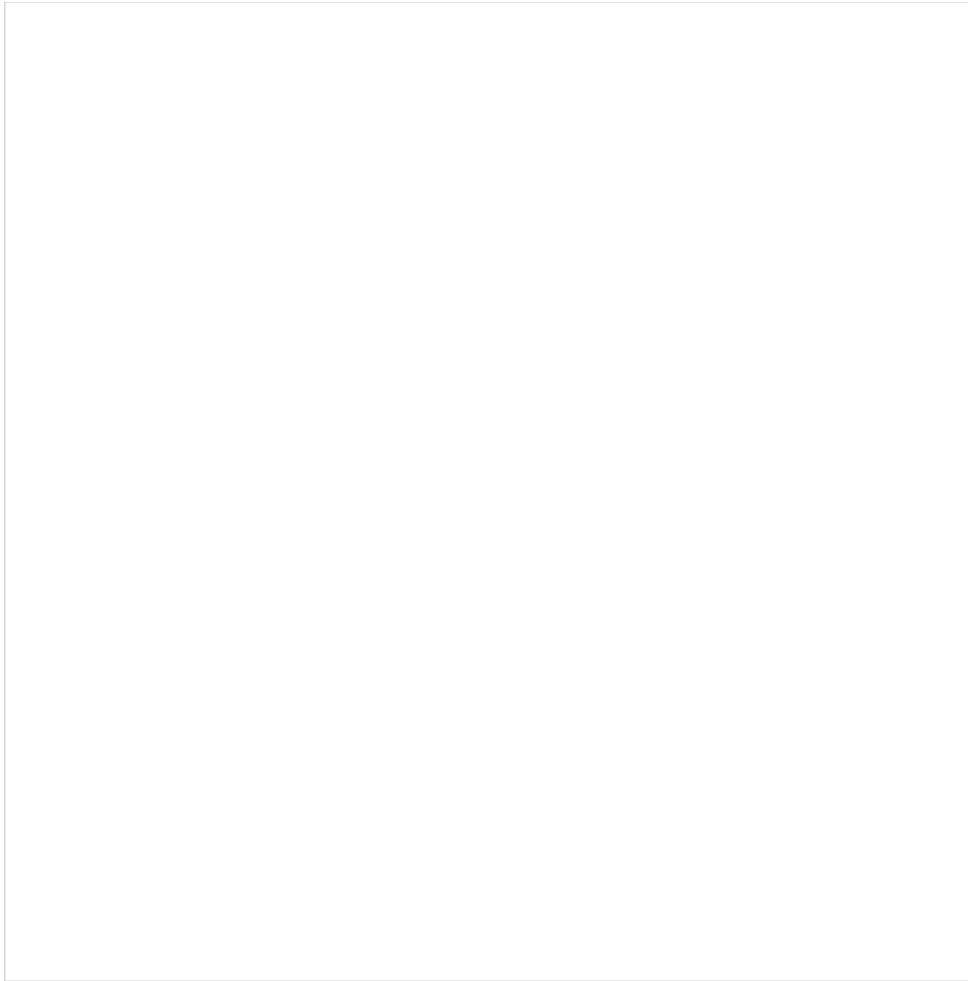
Step 1: Create and configure a chat service

1. Log in to Contact Center Administrator, and go to Services and Campaigns.
2. Click the **Add service (+)** button to create a new chat service.
3. Select **chat** as the type of service.



Choose from the available services

4. In the [Properties tab](#) that appears, update the chat service properties, being sure to give the service a unique name (required). At this point, all other properties are optional. For the sake of this procedure, we are going to keep the properties simple, as shown.

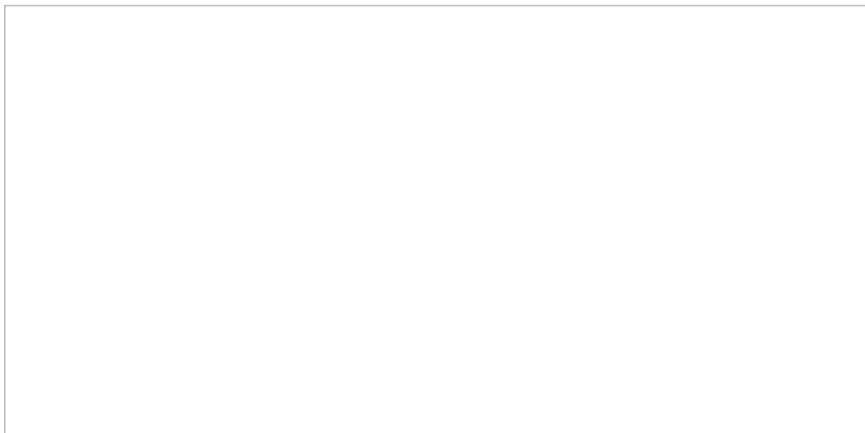


Chat service properties

5. Click **Apply** to save your changes.

Step 2: Assign teams to the service

1. In the [Assignments tab](#), assign teams to this service. Note that the service will be created with a default service skill that can be assigned automatically to all members of the associated teams.



Assign users to teams

2. Optionally assign administrators and reviewers to this service.
3. Click **Apply** to save your changes.

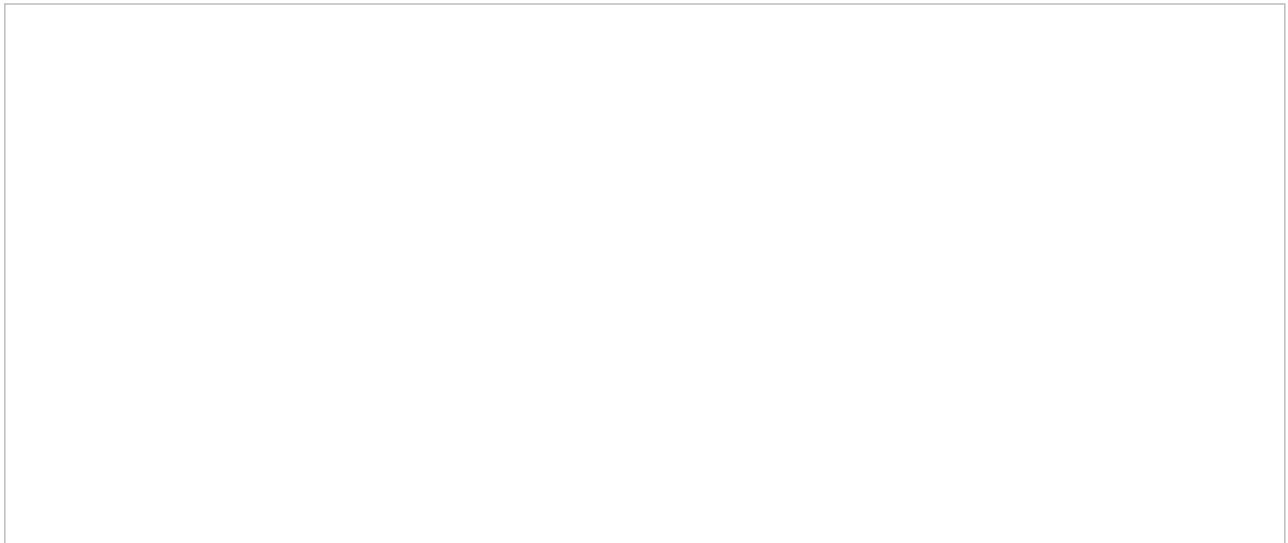
Step 3: Create additional skills and assign them

1. Additional skills are called auxiliary skills. In *Call Center Configuration > Auxiliary skills*, add any other required agent skills for this chat service.



You have to add skills before you can assign them

2. In *Users & Teams > Skill Levels*, assign [auxiliary skills](#) to agents as required skill levels. The higher the numeric value, the more skilled that user is.

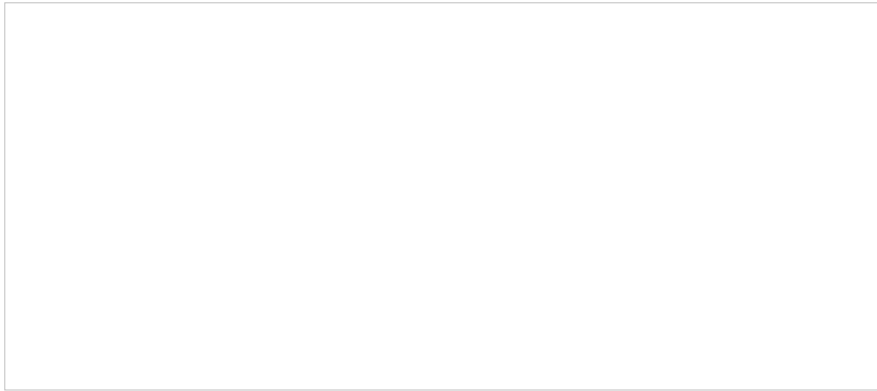


Skills are assigned as percentage values (e.g., "100" or "50")

3. Click **Apply** to save your changes.

Step 4: Specify service level thresholds

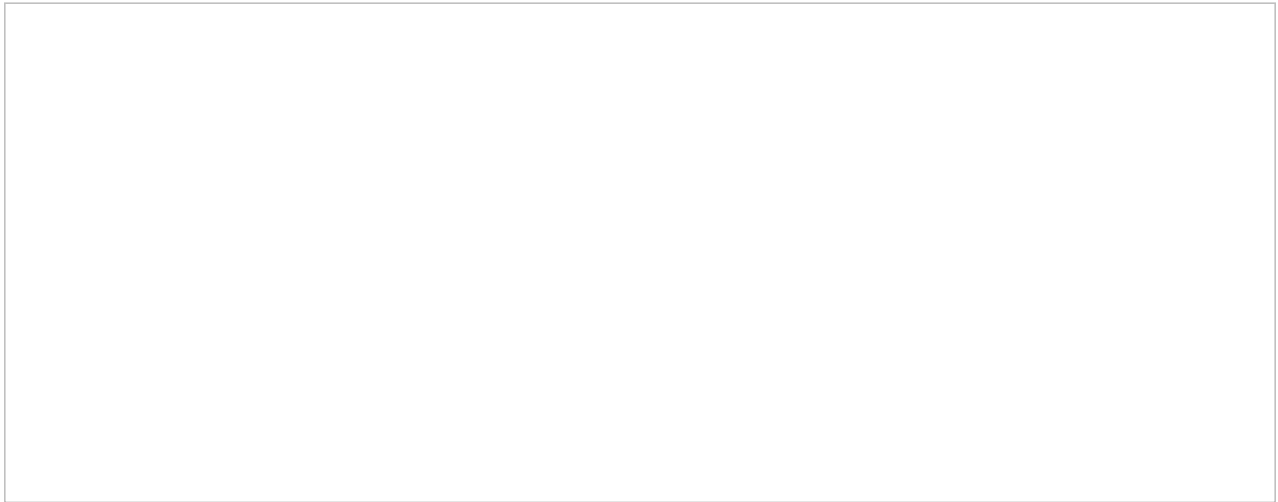
1. Go back to *Services & Campaigns* and select the chat service you just created.
2. In the [Service Level tab](#), set the percentage of chats associated with this service that are expected to be answered within a certain amount of time.



Set service level thresholds

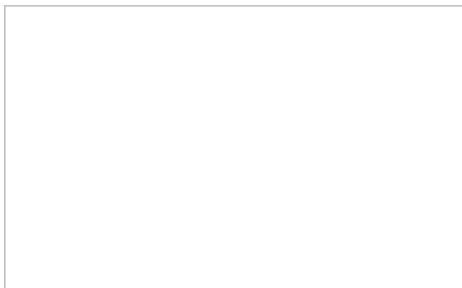
Step 5: Create the scenario for the service

1. Go to *Configuration > Scenarios > [Chat](#)* to create the chat scenario for this service.



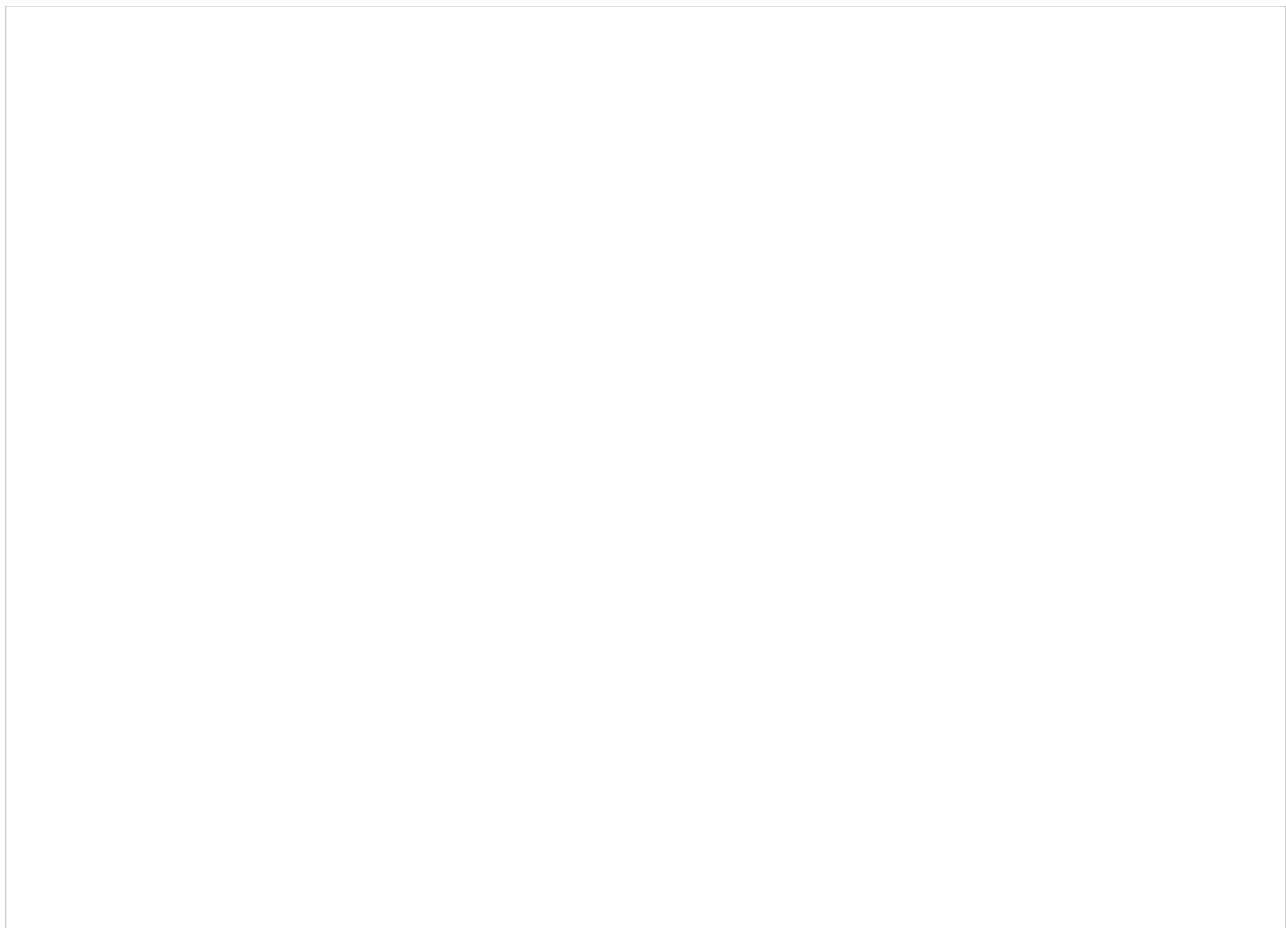
Configuration > Scenarios > Chat

2. Either select an existing chat scenario from the list, or click the **Add from template** button at the bottom of the screen to create a new chat scenario from the "Mobile Chat" template.



Select the "Mobile Chat" template

3. Creating a new chat scenario from a template will open the Scenario Builder application in a new browser tab or window. For the purpose of this simple setup, leave the scenario as-is and click **Save**.

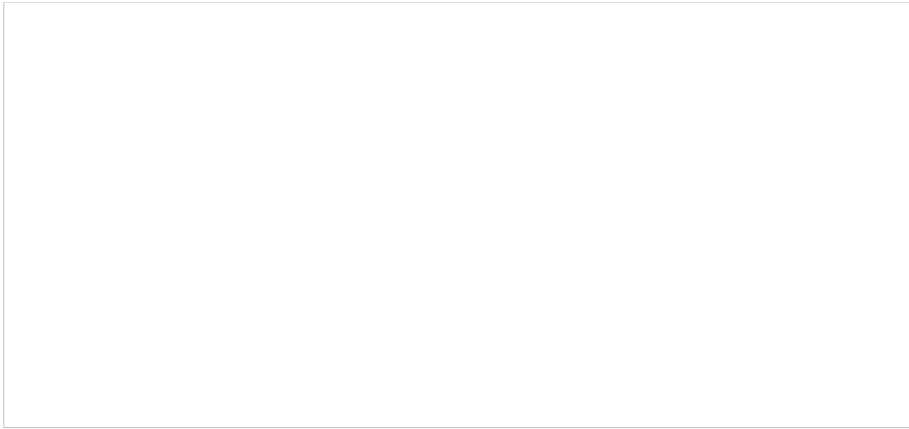


Name the scenario

4. Give the scenario a unique name (e.g., "Sales Chat") and click **Save** again. Your new scenario will appear in the list of scenarios.

Step 6: Add a chat scenario entry to associate the scenario and service with chat

1. Go to *Scenario Entries* > [Messaging/Chat](#).
2. Either select an existing chat scenario entry or click the **Add chat scenario entry (+)** button to create a new one.
3. If this entry is brand new, the following properties are required right now:
 1. **Name** - Give this entry a unique name.
 2. **Scenario** - Select the chat scenario you previously created.
 3. **Service** - Select the chat service you previously created.

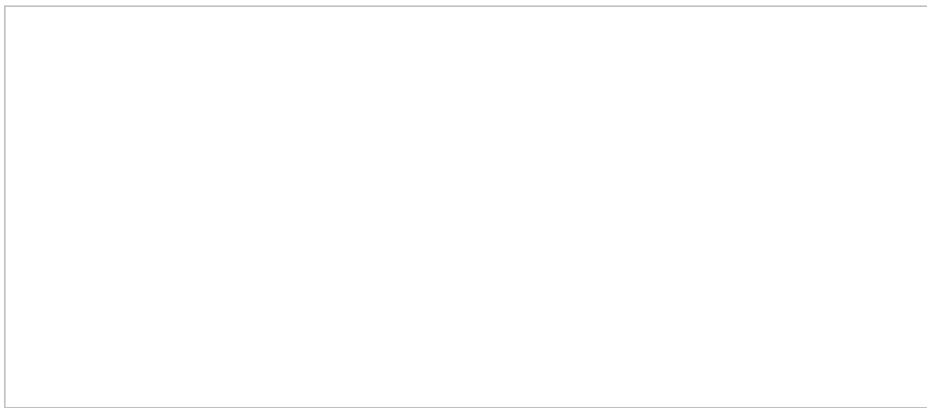


Required properties

4. Click **Apply** to save your changes.

Step 7: Configure SMS/MMS access numbers

1. Still in *Scenario Entries > Messaging/Chat* properties, scroll down to **SMS/MMS access numbers**.
2. Click **add**.
3. Select an SMS/MMS access number for inbound SMS/MMS communications. If you do not see any phone numbers, contact your service provider to get SMS enabled.

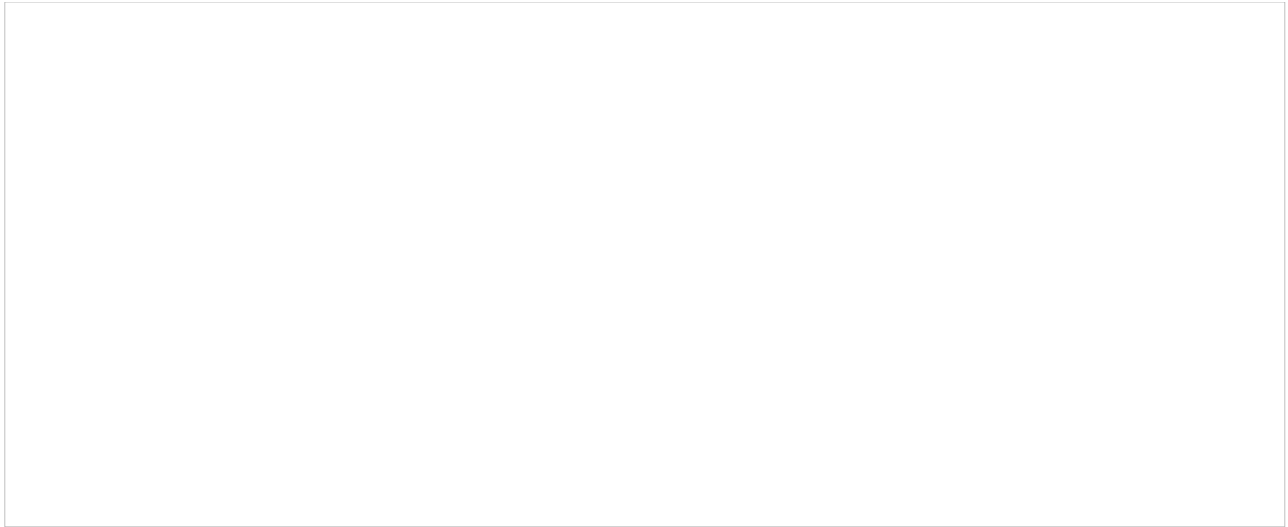


Phone number selection

4. Click the green checkmark.
5. Again click **Apply** to save your changes.

Step 8: Update omnichannel routing settings

1. Go to *Call Center Configuration > [Omnichannel Routing](#)*.
2. Specify the number of sessions that agents can handle simultaneously. The default settings are shown.



Phone number selection

This completes chat service configuration.

Service Configuration Quickstarts

Be sure to read Bright Pattern's other service configuration quickstarts, which will help you to set up bot-assisted chat, voice, and email services for your contact center:

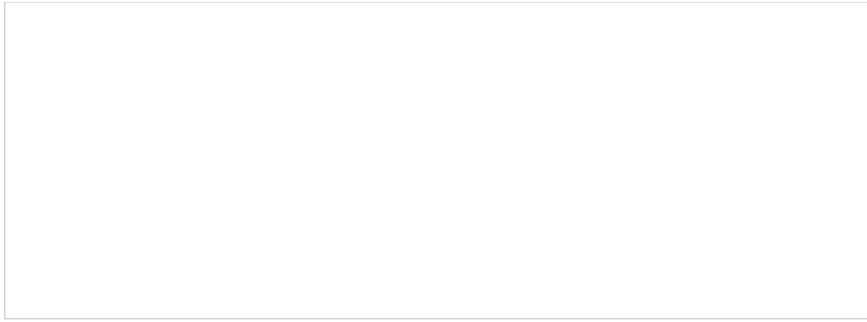
- [Inbound Voice Service Configuration](#)
- [Outbound Campaign Service Configuration](#)
- [Email Service Configuration](#)

How to Configure Web Chat

This procedure explains how to configure a chat scenario, chat service, and chat scenario entry point to work together to display a chat widget on your website. By the end of this procedure, you should have a working chat widget on a webpage that connects customers to your contact center.

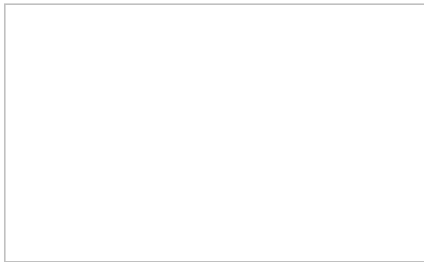
Step 1: Create or Select a Chat Scenario

1. Go to *Configuration > Scenarios > [Chat](#)*.



Configuration > Scenarios > Chat

2. Either select an existing Chat Scenario from the list, or click the **Add from template** button at the bottom of the screen to create a new chat scenario from the "Mobile Chat" template.



Select the "Mobile Chat" template

3. Creating a new chat scenario from a template will open the Scenario Builder application in a new browser tab or window. For the purpose of this simple setup, leave the scenario as-is and click **Save**.



Name the scenario

4. Give the scenario a unique name (e.g., "Super Chat") and click **Save**. Your new scenario will appear in the list of scenarios.

Step 2: Create or Select a Chat Service

1. Go to *Configuration* > [Services & Campaigns](#) and choose a chat service to use with your chat scenario.
2. If there are no existing services of type "Chat," you have to create one.

How to Add a New Chat Service

1. Click the Add service button and select **Chat**.



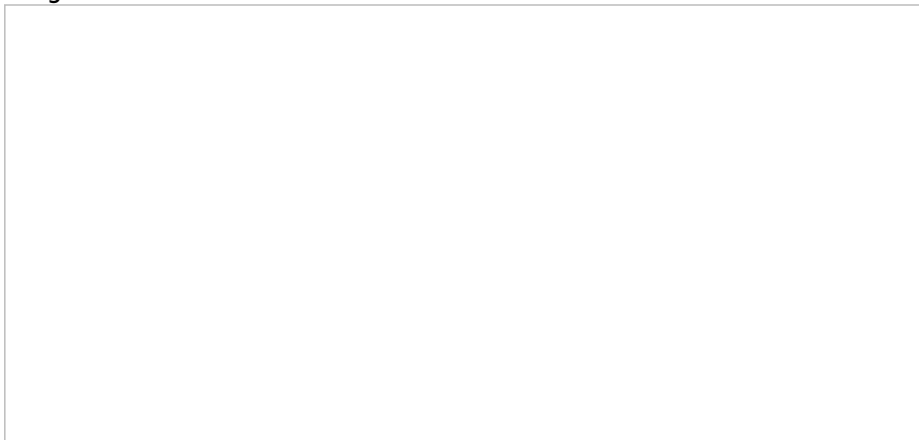
Select the service called "Chat"

2. In the *Properties* tab, fill out the service properties as appropriate, and click **Apply**.
3. At the most basic level, give the new chat service a name (e.g., "Pacific Chat"). For definitions of each property, see the *Contact Center Administrator Guide*, section [Properties Tab](#).



Services & Campaigns > Properties

4. Next, you need to assign a team, an administrator, and a reviewer (optional) to the service. This is done in the *Assignments* tab.



Assign a team and administrator to the service

Step 3: Create or Choose a Chat Scenario Entry

1. Go to *Configuration > Scenario Entries > [Messaging/Chat](#)* and select a scenario entry point to use with your chat scenario. The entry point is what starts the scenario.



Messaging/Chat scenario entries list

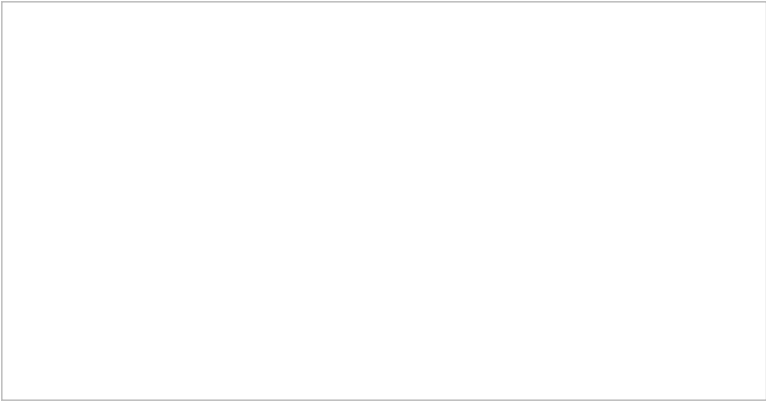
- 2. If there are no existing chat scenario entries shown, you have to create one.

How to Add a New Chat Scenario Entry

- 1. Click the **Add chat scenario entry** button.
- 2. In the Properties tab, fill in the properties as appropriate (see below for required and optional properties). For definitions, see the *Contact Center Administrator Guide*, section [Messaging/Chat](#).

Required Properties

In the Properties tab, make sure to address the following fields right now. These are critical to chat configuration.



Messaging/Chat scenario entry properties that you need to

address for chat to work

- **Name** - The unique name (any) of the chat scenario entry (e.g., "Redwood Chat")
- **Unique identifier** - An automatically generated, long string of characters that identifies the chat entry (e.g., "1f03f4090e4b4ffe8bb55365812e7a06")
- **Scenario** - Choose the Chat Scenario you selected or created in step 1 of this procedure (e.g., "Super Chat"). This is where the parts come together to make chat possible.
- **Service** - Choose the Chat Service you selected or created in step 2 of this procedure (e.g., "Pacific Chat"). This is where the parts come together to make chat possible.

Other Properties

The remaining properties are optional at this time. You can come back to them later.

- **Default service for voice callback** - Select a voice service if your agents will need to make a call (note: it needs to be a voice service).
- **Merge sessions for identified contacts** - This checkbox is what makes omnichannel possible (i.e., a recognized Facebook Messenger chat session or a recognized phone number can be merged together).
- **Web HTML snippet** - Come back to this button after you have completed and saved all your properties options. The HTML snippet is what you will be embedding into your webpages in order to make chat functional
- **Full chat code for local hosting** - Click this if you will be customizing chat and hosting it on your own website. Bright Pattern provides this code for customers whose websites do not accommodate integration with Bright Pattern chat.
- **Requested skills** - The auxiliary skills that agents need in order to accept a chat
- **SMS/MMS access numbers** - Phone numbers that will be used for receiving/sending SMS/MMS messages from/to customers. All incoming messages to this account will start the chat scenario. If no such accounts are not selected here, your scenario is strictly web chat.
- **Messenger Accounts** - The social messenger accounts that will be used for receiving/sending messages from/to customers. All incoming messages to this account will start the chat scenario. Note that in order to use messenger accounts, messenger integration accounts must be configured for your contact center. If no such accounts are not selected here, your scenario is strictly web chat.
- **Bot / Chat suggestions engine** - The engine that will provide suggested replies to the agent during chat. Note that in order to use a bot/chat suggestions engine, you must have an integration account configured for your contact center.
- **Connect agent by phone automatically** - When selected, this option enables automatic connection of an agent to a phone number that a customer sends. If not selected, the agent must take the additional step to dial a number manually.
- **Connect after delay of** - If Connect agent by phone automatically is selected, you may configure a delay (in seconds) for the connection between agent and customer.
- **Queueing priority** - The priority level of the customer in the queue (e.g., "1" is high priority, "3" is low, etc.). Leave the queueing priority as-is unless you want to de-prioritize the caller.
- **Chat nick for system messages** - The name for this scenario entry that will be shown with system messages

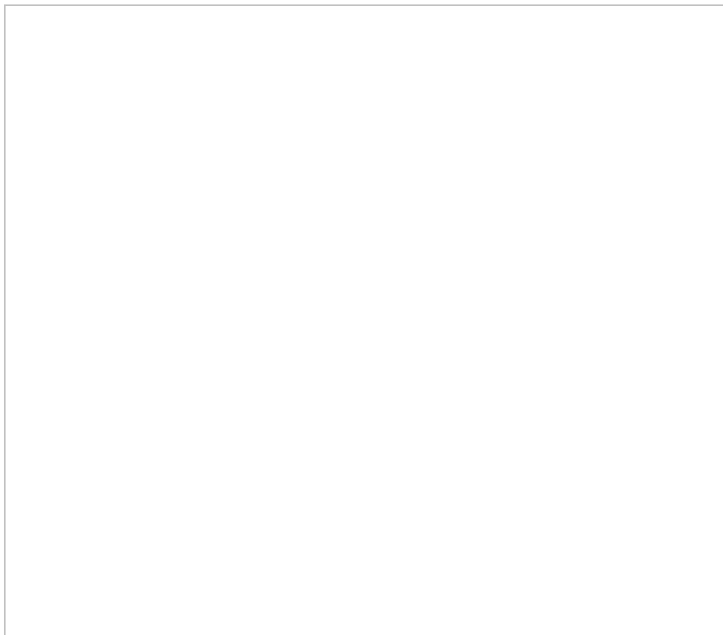
sent to customers in the chat (e.g., "Redwood Customer Service has joined the chat!")

- **How long an agent could wait for reply before chat times out**- The amount of time (in minutes) between replies for the session to timeout
- **How long a client browser may stay unresponsive before chat times out** - The amount of time (in minutes) that the browser has been idle for the session to timeout. Note: If you are in an area where service is bad, you may want to increase the timeout.
- **Visible to agents** - When this checkbox is selected, this scenario entry will appear as an entry for all new chat sessions and chat transfers (e.g., agents can receive the chat from a different service). Note that services are added in the Directory folder.
- **Scenario parameters** - This section will be deprecated.
- **Chat session icon** - Allows you to set an image to this scenario entry (i.e., in chat, will override the agent's image in the chat widget). This property will be deprecated. The chat session icon can be added in Chat Widget configuration. See section Chat Widget tab > Chat Styling > Show agent pic.

Step 4: Edit Chat Widget Style

You can edit the appearance (i.e., color, font size, location, etc.) of the chat widget in the *Chat Styling* section. This step is important to complete; if you don't do this, your contact tab (see Step 5 of this procedure) will not appear in preview.

1. Click on the *Chat widget* tab.
2. Beneath *Chat Styling*, click **edit**.



Chat Styling > edit

3. The Chat Widget Configuration editor will open in a new browser tab or window. Edit the [Chat Widget Styling properties](#) and fields as desired. At the most basic level, you can leave everything as-is at this point and save

your changes. You can come back to this later.



Chat Widget Configuration editor in new browser tab/window

4. At the bottom of the screen, click **Save**.

Step 5: Add a Contact Tab

In order for this chat scenario entry to work, you must add a contact tab for the chat widget. If you don't do this, your webpage will not display the chat widget!

1. Click on the *Chat widget* tab.
2. Beneath *Chat Initiation via Contact Tabs*, click **add**.



Add a new contact tab

3. The Chat Widget Configuration editor will open in a new browser tab or window. Edit the [properties](#) and fields as desired.



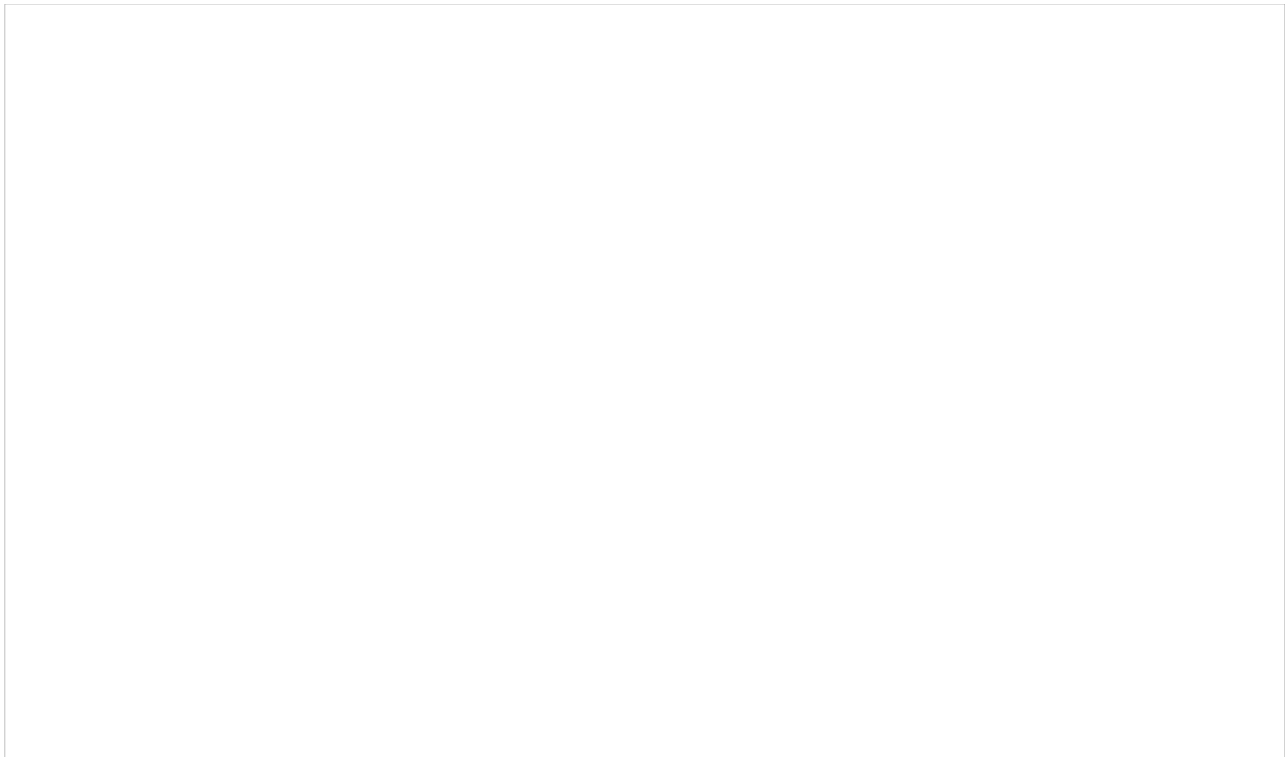
Chat Widget Configuration editor in new browser tab/window

4. **Optional:** To preview how the contact tab will look on your webpage, enter your URL in the *Preview URL* field and click **Apply**. Your webpage will load on the screen with the contact tab on it, and you will be asked to confirm whether you see the content.



Example preview URL shows the webpage but not the chat widget

Some websites are protected from being embedded into third-party websites; if this is the case, you will see the message "Chat widget not found!" in red. To preview the contact tab without your webpage displayed, leave the *Preview URL* field empty.



When left empty, Preview URL shows no webpage content

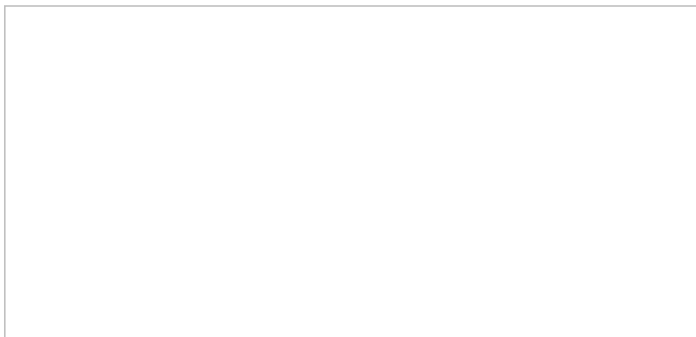
5. **Required:** At the most basic level, these actions are required right now:

* **Name** - The unique name (any) for this new contact tab

* **Save** - Click to save changes

6. Back in the *Chat widget* tab, go to *Chat Initiation via Contact Tabs*.

7. Beneath the contact tab you just added, click **add url**.



Make sure you add the URL of your webpage

8. Enter the path relative to your root, being sure to exclude port, domain, protocol. For example, for <https://mysite.com:8443/folder/folder/page.html>, you could enter **/folder** or **/folder/folder** or **/folder/folder/page.html**. Click the green checkmark to apply your changes.

9. **Optional:** At this time, you may add or edit any of the other *Chat widget* tab sections. You can always come back to this for further changes.

10. At the bottom of the screen, click **Apply** to save your changes.

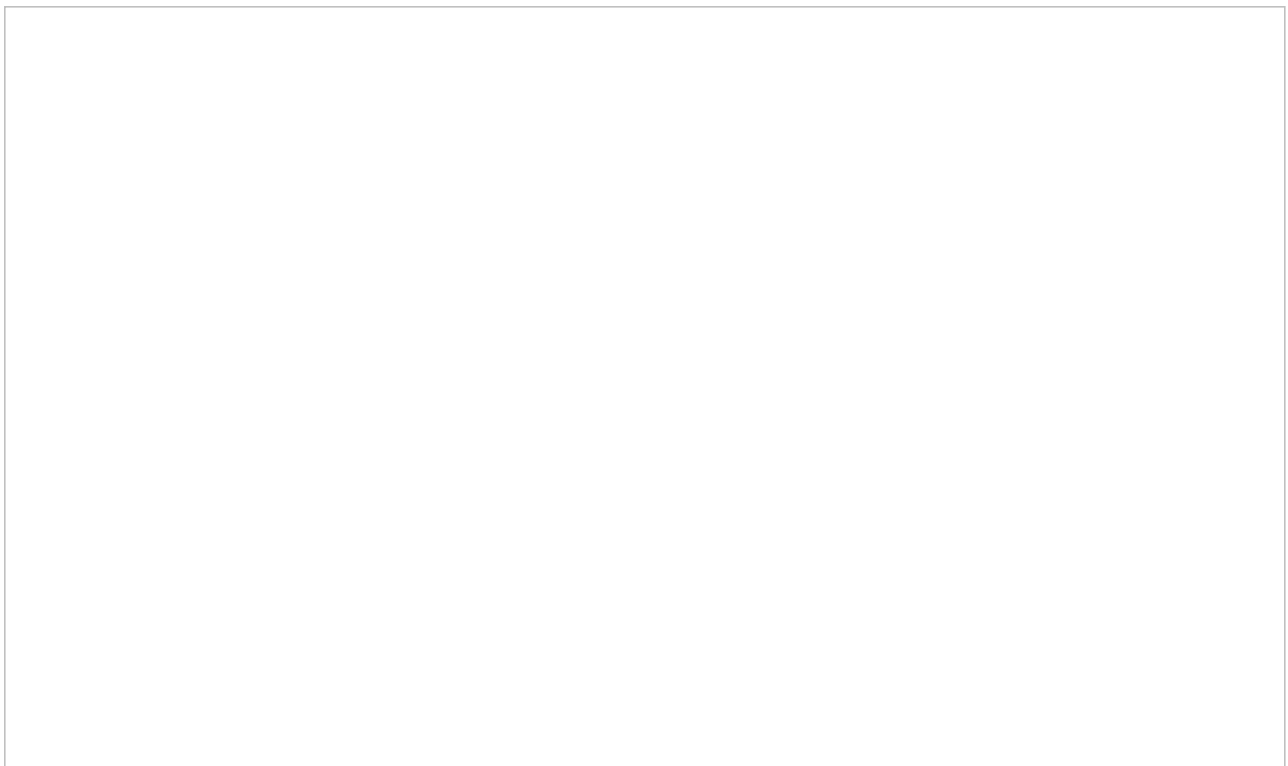
Step 6: Get the HTML

1. Go back to *Properties tab > Web HTML snippet*.
2. Click the **HTML snippet** button. The HTML snippet is the code for the chat widget you just configured.



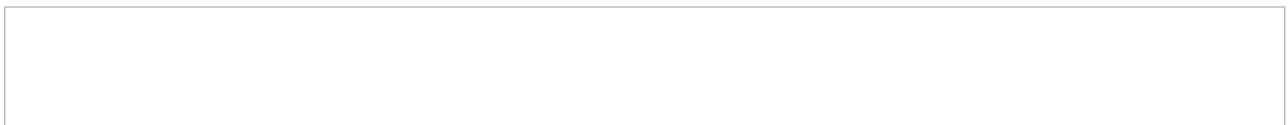
In the Properties tab, click "HTML snippet"

3. The *HTML Snippet for Web Page* dialog will open.



HTML Snippet for Web Page dialog

4. In the field **Specify client web server hostname**, enter your contact center's name (i.e., "company.brightpattern.com"). If you don't know what it is, look at the URL of your Contact Center Administrator application in the web browser. The hostname is the name that appears before "/admin".



Example of client web server hostname in browser address field

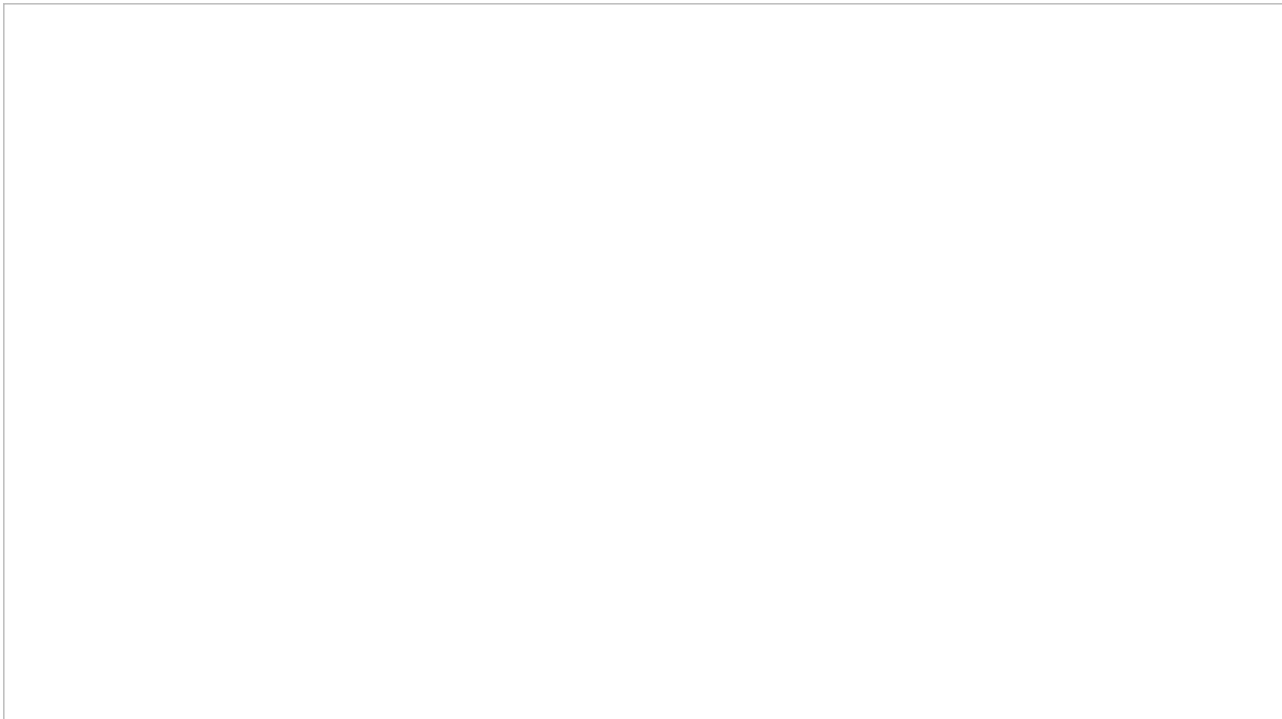
5. Click **Copy to clipboard** to copy the HTML. This is the code of the chat widget.

6. Paste the HTML onto the appropriate place on your webpage and publish. The chat widget contact tab (and any other chat widget elements that you added in chat widget configuration) will appear on the page.



Chat widget on an example webpage

On the webpage, clicking on the contact tab will expand the widget.



Chat widget expanded to show pre-chat form fields

If you do not see the chat widget on your page, revisit the previous steps of this procedure and try again.

For more information on chat widget configuration, see the [Chat Widget Configuration Guide](#).

Chat Widget Auto-Start

You may configure the chat widget to initiate a chat session automatically upon a webpage loading. With this configuration, no customer action is required to launch the widget and, when the webpage is loaded, the chat automatically connects to an agent or the queue.

To do this, follow these steps:

1. Open the *HTML Snippet for Web Page*.
2. Paste the copied HTML into a text editing application (e.g., Notepad++) to edit it.
3. In the "Service Pattern Chat Config" object, add the attribute **autostartChat** with the value **true**. Note that the default value is **false**.
4. Copy all and paste the edited HTML onto your web page.
5. Publish the webpage and refresh any active chats.

The following is an example of how this looks in the *HTML Snippet for Web Page*.

```
SERVICE_PATTERN_CHAT_CONFIG = {  
  ...  
  autostartChat: true,  
  ...  
};
```

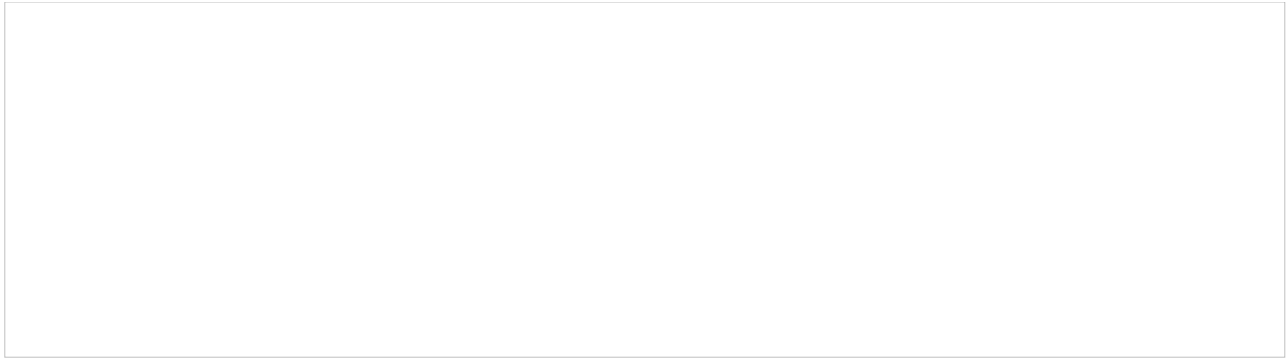
How to Remove the Call Option from Service Chat Sessions

During active chat sessions, agents and customers have the ability to initiate VoIP calls (i.e., audio only) by simply clicking the **headset** button. The option to have [audio-only calls via chat](#) is enabled and disabled during chat widget configuration.

This article will show you how to remove the headset button from service chat sessions, so that neither agents nor customers have the option to have a voice call during a chat.

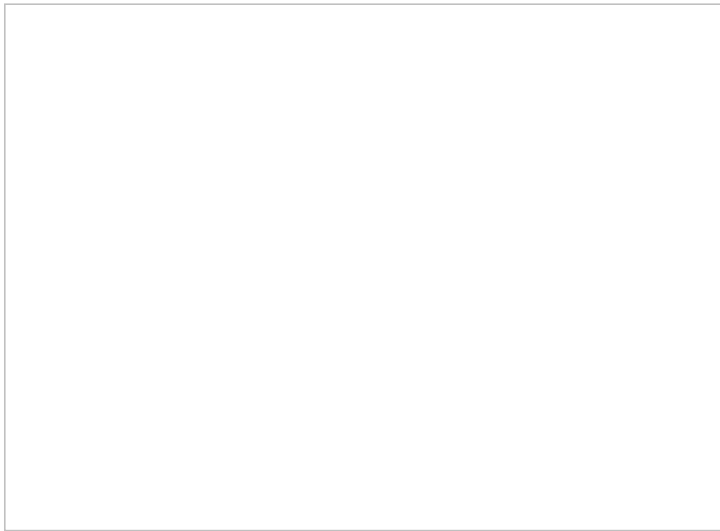
Procedure

1. In the Contact Center Administrator application, section *Configuration > Scenario Entries > Messaging/Chat*, select the chat scenario entry you wish to edit, and click the **Chat Widget** tab.



Scenario Entries > Messaging/Chat > Chat Widget tab

2. Beneath **Chat Styling**, click **edit** to edit the chat widget's style properties.



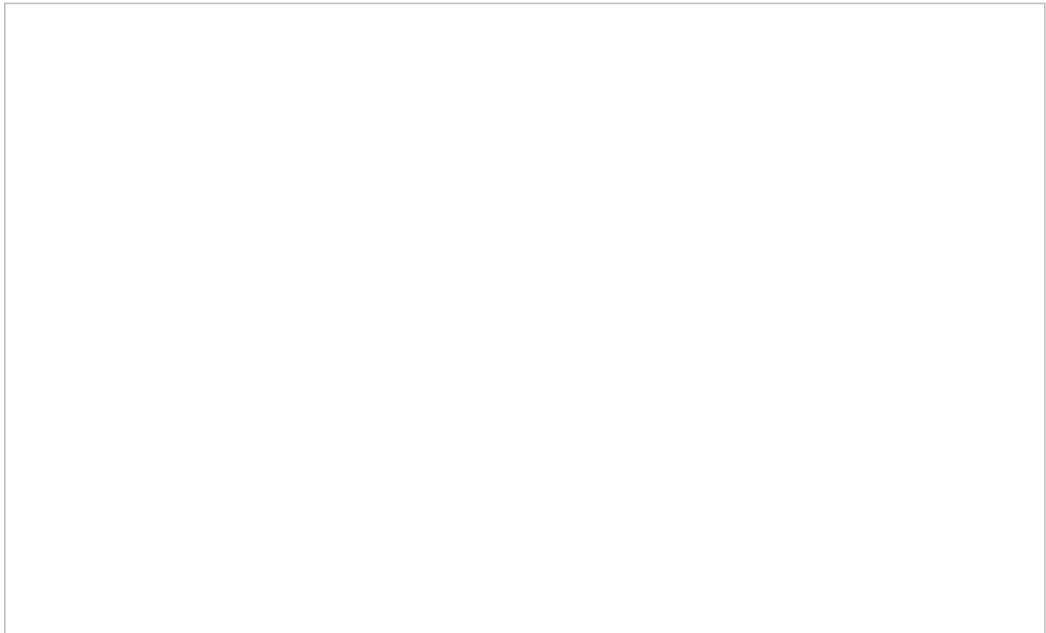
Chat Widget tab > Chat Styling > edit

3. In the Chat Widget Configuration editor that opens, notice that the preview widget shows the headset button. This is the button that will be removed.



Chat Styling properties and preview of chat widget

- 4. In [Chat Widget Styling properties](#), deselect the **allow** checkbox for VoIP call. Note that this action removes the both headset button and the visitor video button from the chat widget (because video chat uses VoIP for the audio portion of the video call).



Chat Widget tab > Chat Styling > edit

- 5. At the bottom of the page, click **Save** to save your changes.

How to Configure Proactive Offers in Chat

A proactive offer is a pop-up web chat widget that offers opportunities to call or chat with a live agent. We call them proactive because, unlike typical service interactions that rely on the customer to initiate the conversation, proactive offers are initiated by contact centers.



Example of a proactive offer widget

You can use proactive offers to offer immediate help, promote sales and discounts, entice customers not to leave the website, and much more. In Bright Pattern Contact Center, proactive offers are configured to launch when specified conditions are triggered. Note that you can place a proactive offer on the same page as a web chat, or you can place the proactive offer stand-alone.

In this article, you will learn how to configure a chat scenario, chat service, chat scenario entry point and proactive offer conditions to work together to pop proactive offers on your website.

Procedure

Step 1: Create or choose a chat scenario

You may select an existing chat scenario to use, or create a new chat scenario. For details, see the *Contact Center Administrator Guide*, section [Chat Scenarios](#).

Step 2: Create or choose a chat service

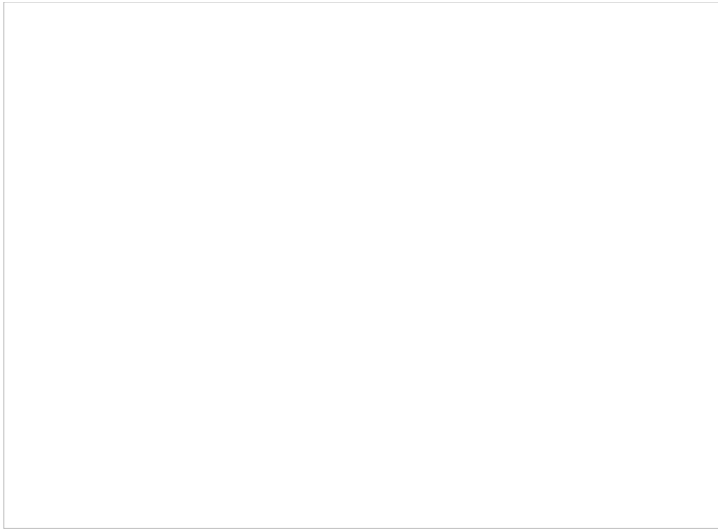
To launch any type of chat, you will need to have a chat service configured first. For details, see our tutorial, [Chat Service Configuration](#).

Step 3: Create or choose a messaging/chat scenario entry

You also need to create or select an existing messaging/chat scenario entry. For details, see the *Contact Center Administrator Guide*, section [Messaging/Chat Scenario Entries](#).

Step 4: Add a proactive offer

In the Contact Center Administrator application, section *Scenario Entries > Messaging/Chat > Chat widget tab*, beneath *Proactive Offers*, click **add**.



Messaging/Chat scenario entry > Chat widget tab

When the Chat Widget Configuration Editor opens, you will see the following areas:

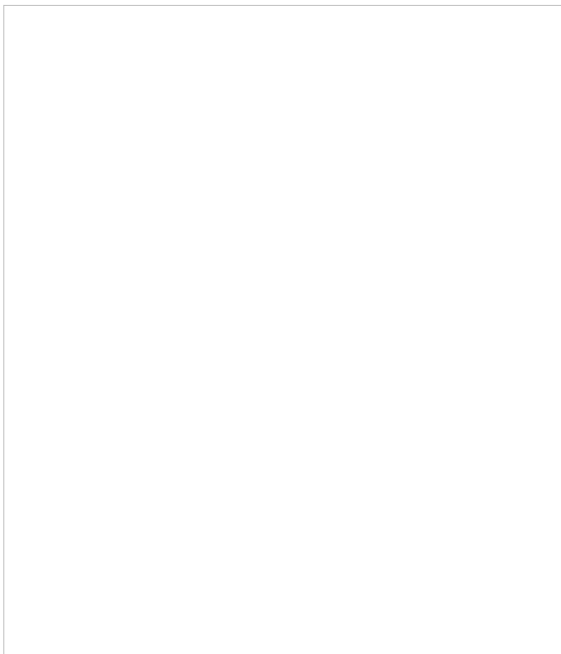
- **Name** - You must enter a name (any name) for the widget.
- **Tabs** - On the left side of the screen, click on each tab to edit specific properties of the proactive offer widget.
- **Preview URL** - Optionally enter the URL of the webpage where this widget will appear. Doing so will make the page appear as a background for the proactive offer widget in the preview pane. Note that the webpage must be hosted in order to display properly in the preview pane.
- **Preview pane** - Displays a preview image of the widget as it is configured. If you entered a preview URL, the widget will appear with that webpage in the background, in the same position and style as configured.



Chat Widget Configuration Editor screen

Step 5: Enable the proactive offer and set contact options

The **Proactive Offer** tab is where you turn on the widget and determine which communication channel(s), such as chat or voice call or both, to offer the customer.



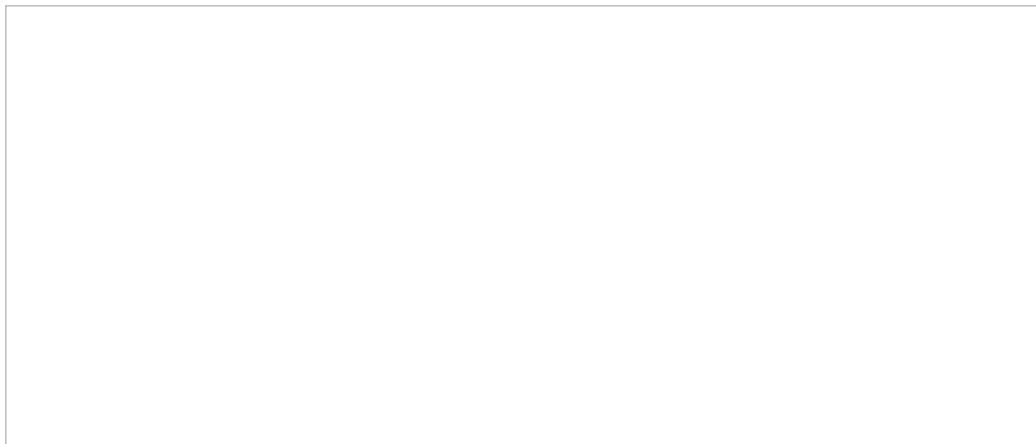
Proactive Offer tab properties

Set the following:

- **Enabled** - Select the checkbox to enable the proactive offer widget. This is the most important setting. If you do not select Enabled, the proactive offer will not be shown on your website.
- **HTML Content** - By default, the HTML shown is “<h1 style="text-align: center">Do you need any help?”. You may customize the code however you want, as long as you use proper HTML tagging. For example, you may change the formatting/display of text and insert reference to images into the proactive offer widget.

For example:

```
<h1 style="text-align: center">Header Text<br>
```



Example of a proactive offer widget with image inserted

Note that the proactive offer styling (e.g., text color, background color, button color, etc.) is controlled by overall chat styling, and it cannot be overridden in the proactive offer's HTML Content field. To make such style changes, go to the Contact Center Administrator application, section *Scenario Entries > Messaging/Chat > Chat widget tab > Chat Styling*, and click **edit**. For more information, see the *Chat Widget Configuration Guide*, section [Chat Widget Styling](#).



Chat Styling > Edit

Contact Options

Within the Proactive Offer tab are **contact options**, which are the clickable methods of reaching your contact center. You do not have to set both call and chat options; you are welcome to choose one or both.

All of the following **contact options** should be set as desired:

- **Chat button enabled** - Select checkbox if you want to allow customers to start a web chat from the proactive offer widget.
- **Chat button text** - The display label on the Chat button; by default, this is "Chat"
- **Phone call button enabled** - Select checkbox if you want to allow customers to start a voice call from the proactive offer widget.
- **Phone call button text** - The display label on the Call button; by default, this is "Call"
- **Cancel button text** - The display label on the Cancel button; by default, this is "Cancel"
- **Close button** - Select checkbox if you want the "X" Close button to appear on the proactive offer widget. This is optional but recommended.

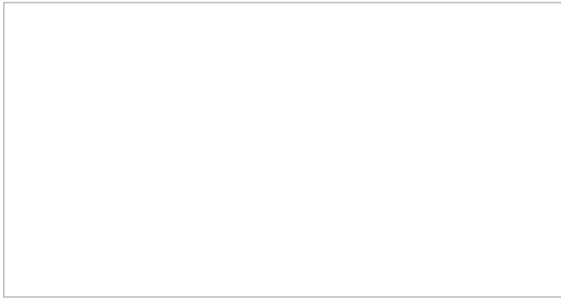
Step 6: Set the proactive offer widget's style

In **Proactive Offer Styling**, you can determine the look and feel of the widget itself. If you make no changes, the widget's style will remain in the default settings shown.

To customize style, set the following as desired:

- **Width** - The widget's width in pixels
- **Height** - The widget's height in pixels
- **Animation in** - How the proactive chat widget moves across or appears on the screen
- **Animation out** - How the proactive chat widget moves off the screen

- **Location** - Where the chat widget will be placed on your webpage (e.g., top right, middle right, bottom right, etc.)



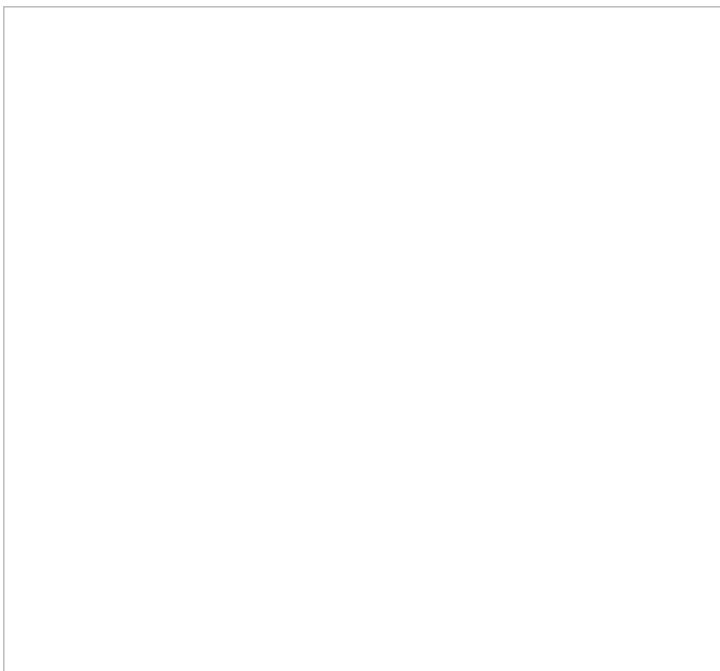
Proactive Offer Styling tab properties

Step 7: Set proactive offer conditions

In **Proactive Offer Conditions**, click **add** to set the requirements that must be met for the proactive chat to be shown to website visitors. These requirements are called conditions, and conditions are what make your proactive offers creative and specific to your use case. You can add as many conditions as you like.

Many [conditions](#) are available, but the most common conditions include the following:

- **About to exit (mouse move)** - This condition will trigger a proactive offer to pop when the customer's cursor moves on the page, as if to leave the page or navigate somewhere else. You can use a proactive offer to get the customer's attention and keep them on the page longer.



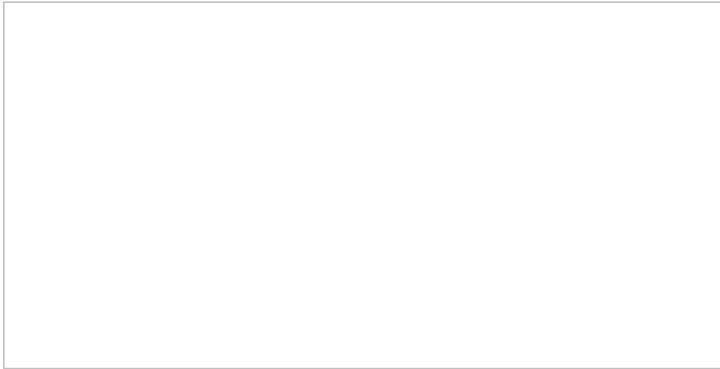
Selecting the "About to exit" condition

- **Referring URL** - This condition will trigger a proactive offer to pop when the customer accesses a specific page

via a specific URL, such as one provided in a sales offer.

For example, let's say an email newsletter announces a summer promo and all you have to do is <click here> to get a special discount, where <click here> is the URL https://mycompany.com/2020/06/?utm_medium=&utm_source=newsletter&utm_campaign=20200617-enews-&utm_content=summerdiscount

In that example, you would paste that URL into the text field, as shown, to set the Referring URL condition:



Selecting the "Referring URL" condition and adding URL

Step 8: Optionally configure a pre-chat form

This step is optional, to be completed only if you enabled chat in the proactive offer *and* you want to collect some information from the customer before they are connected to an agent in chat.

In the **Pre-Chat Form Configuration** tab, select the checkbox for **Enabled** and set the [pre-chat form properties](#). If you do not select Enabled, no pre-chat form will be presented to the customer.



Pre-Chat Form tab properties

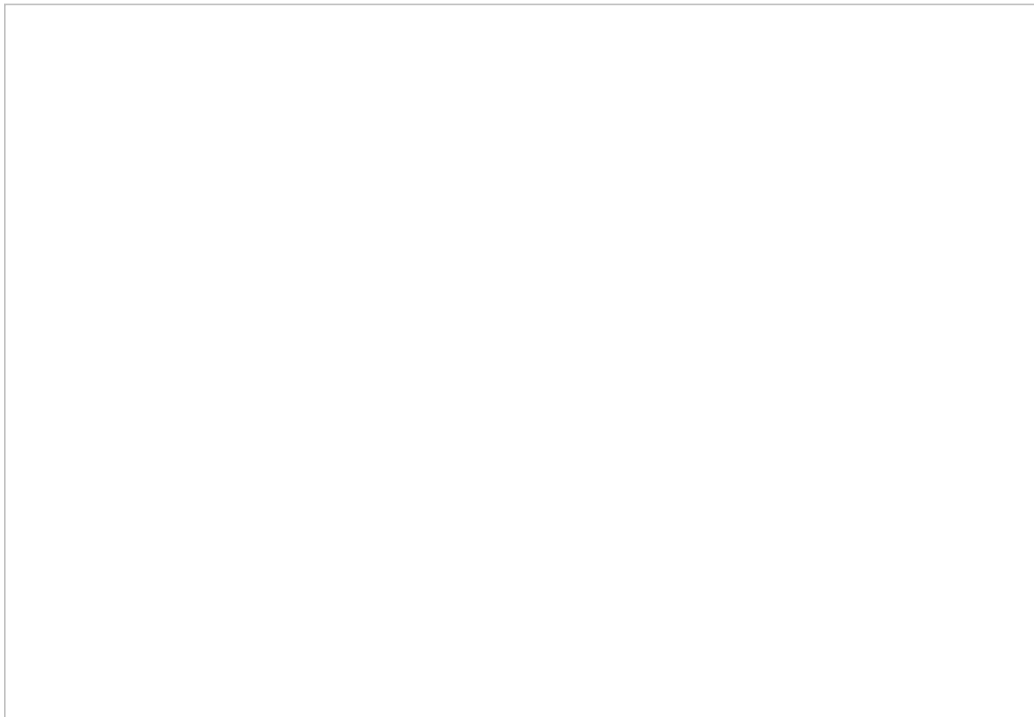
Step 9: Add your webpage's URL

1. Save your work and then close the Chat Widget Configuration Editor.
2. Back in the Chat Widget tab, beneath your proactive offer, click **add url**.



Add the URL to make the proactive offer launch on the page

3. Enter the URL of the webpage where the proactive offer will appear. If you do not do this, the proactive offer will not launch.



After adding the URL to the proactive offer, the URL is displayed

4. Click **Apply** at the bottom to save your changes.

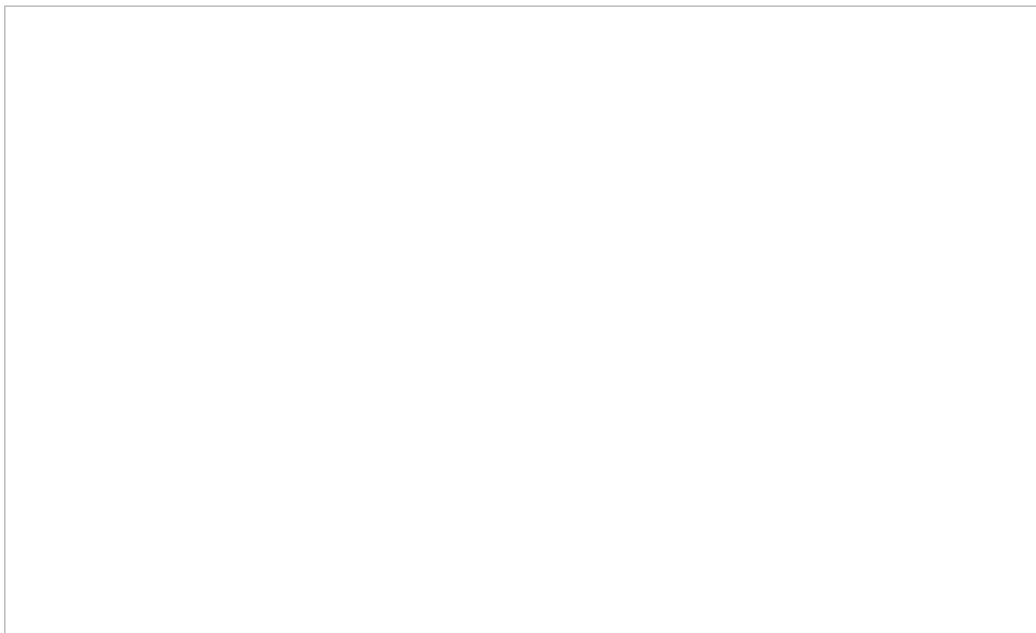
Step 10: Get the HTML

Copy the proactive chat widget's code and place it on your webpage. See [How to Use the Web HTML Snippet](#).

Step 11: Test the proactive offer

As the final step of this process, test that the proactive offer can be launched with your specified conditions:

1. Log in to Agent Desktop as an agent on the team assigned to the chat service, and set your agent state to **Ready**.
2. In a separate web browser (incognito is OK), go to the webpage where the HTML chat snippet has been placed.
3. Trigger all the proactive offer conditions specified in configuration. If, for example, you specified the "About to exit (mouse move)" condition, remain on that page for several minutes and then try to close the browser tab or window. Your movement should cause the proactive offer to pop on the page.



Example of proactive offer on a live page

4. If the proactive offer does not launch, go back through this procedure and make sure that you have followed all steps.

Proactive offer configuration is now complete. For more information on chat widget configuration, see the [Chat Widget Configuration Guide](#).

How to Use the Web HTML Snippet

A *chat widget* is an HTML-based application that's placed on your company's website to facilitate active chat interactions between customers and contact center agents and/or integrated bots.

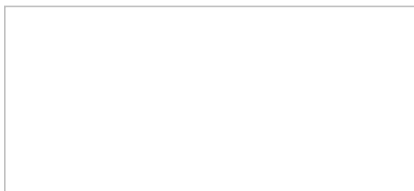
Bright Pattern Contact Center provides an HTML snippet (as well as the full chat code for local hosting) for every chat widget configured for your contact center. The *HTML snippet* is the code that defines the chat widget's configuration.

In this article, you will learn how to grab the HTML snippet and use it on your company's website.

Procedure

Step 1: Locate your chat scenario entry

1. In Contact Center Administrator, go to *Configuration > Scenario Entries > Messaging/Chat*.



Configuration > Scenario Entries >
Messaging/Chat

2. Select the desired chat scenario entry to view its properties.

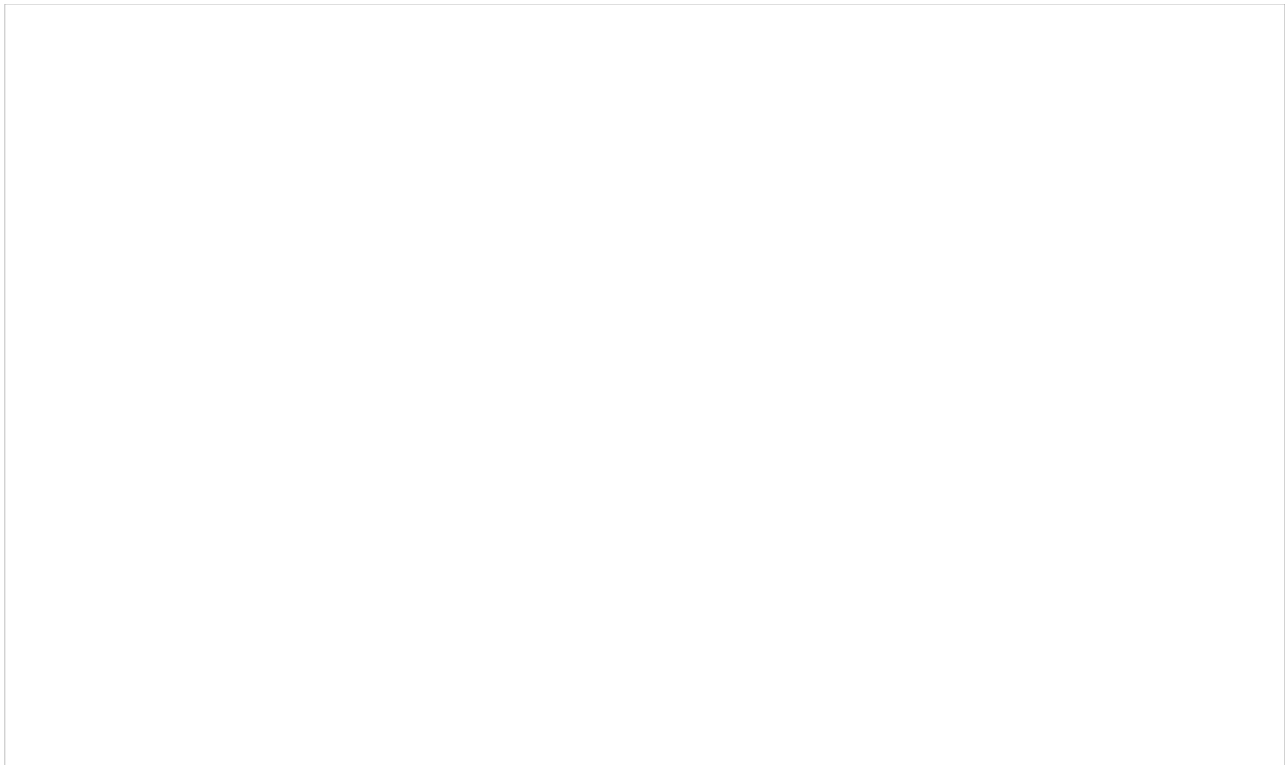
Step 2: Get Web HTML snippet

1. In the *Properties tab > Web HTML snippet*, click the **HTML snippet** button. The HTML snippet is the code for the chat widget you have configured. If you have not already set up a chat widget, see [How to Configure Web Chat](#).



In the Properties tab, click "HTML snippet"

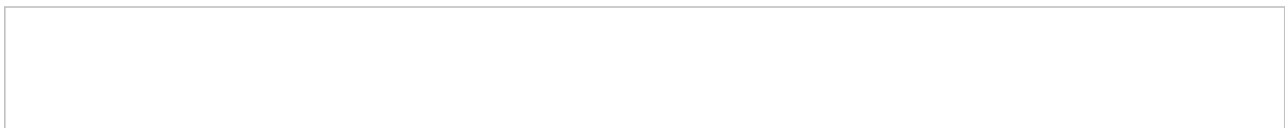
2. The *HTML Snippet for Web Page* dialog will open.



HTML Snippet for Web Page dialog

Step 3: Enter your contact center's hostname

1. In the field **Specify client web server hostname**, enter your contact center's name (i.e., "five.brightpattern.com"). If you don't know what it is, look at the URL of your Contact Center Administrator application in the web browser. The hostname is the name that appears before "/admin".



Example of client web server hostname in browser address field

2. Click **Copy to clipboard** to copy the HTML. This is the code of the chat widget.

Step 4: Paste the snippet into your HTML file

You may find it helpful to paste the HTML snippet into a plain text file first, before putting it into your webpage's HTML. You should paste the snippet underneath the closing `<body>` tags within your HTML.

Example Code

The following is an example of the HTML snippet placed into a basic Doctype HTML file. The snippet text is shown in blue.

```
<!DOCTYPE html>  
<head>  
  <meta charset="utf-8">
```

```
<title>My Chat Widget</title>
</head>

<body>
<p>This is my test page.</p>
</body>

<link type="text/css" rel="stylesheet" href="https://company.brightpattern.com/clientweb/chat-client-v4/css/form.css">
<script type="text/javascript">
  SERVICE_PATTERN_CHAT_CONFIG = {
    appld: '123456789',
    apiUrl: 'https://company.brightpattern.com/clientweb/api/v1',
    tenantUrl: 'company.brightpattern.com',
    chatPath: 'https://company.brightpattern.com/clientweb/chat-client-v4/'

    /*
     // Default customer data, it can be collected on current site's context
     first_name: ,
     last_name: ,
     email: ,
     phone_number:
    */
  };
</script>
<script src="https://company.brightpattern.com/clientweb/chat-client-v4/js/init.js"></script>

</head>
</html>
```

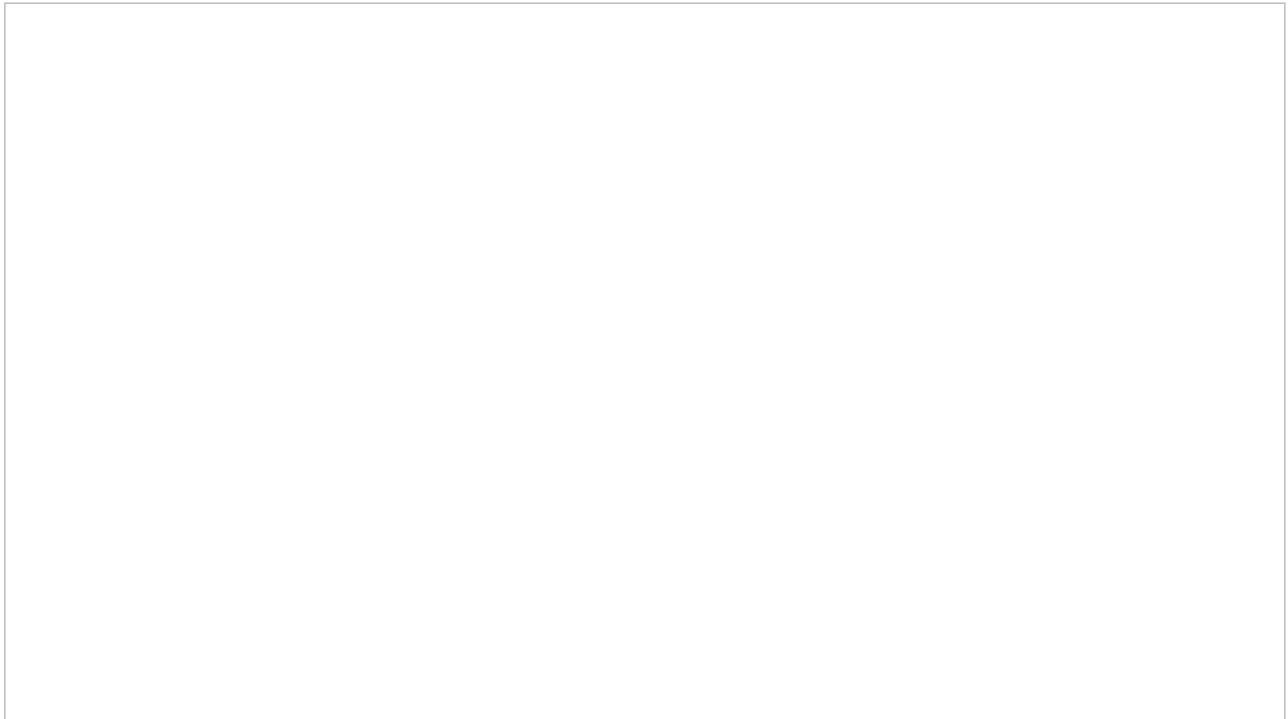
Step 5: Publish your page and test the chat widget

1. Place your HTML snippet in the appropriate place on your webpage and save.
2. Publish your page. In the examples shown, the HTML snippet was placed onto a webpage created on free website building application. The chat widget contact tab (and any other chat widget elements that added in chat widget configuration) appears on the page.



Chat widget on an example webpage

3. On the webpage, clicking on the contact tab will expand the widget.



Chat widget expanded to show pre-chat form fields

For more information on chat widget configuration, see the [Chat Widget Configuration Guide](#).

How to Pass JavaScript Variables Through Web HTML Snippet

As you learned in our tutorial, [How to Use the Web HTML Snippet](#), the web HTML snippet is the code that defines your chat widget's configuration.

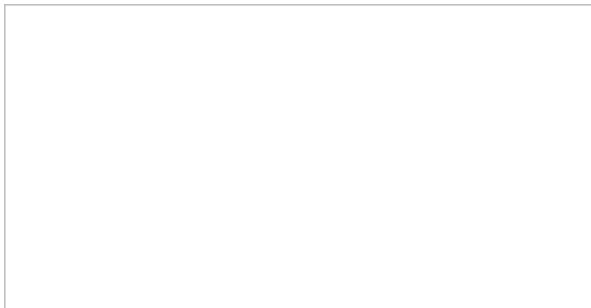
The snippet contains the formatting and style of your configured chat widget, the path to your chat application, the mobile/web API endpoint, the URL of your contact center, and a path to the chat. You can edit the snippet to pass some standard variables through the chat, such as `first_name`, `last_name`, `email`, and `phone_number`. It is also possible to pass custom variables through the snippet.

In this article, you will learn how to format such custom variables in the snippet.

Procedure

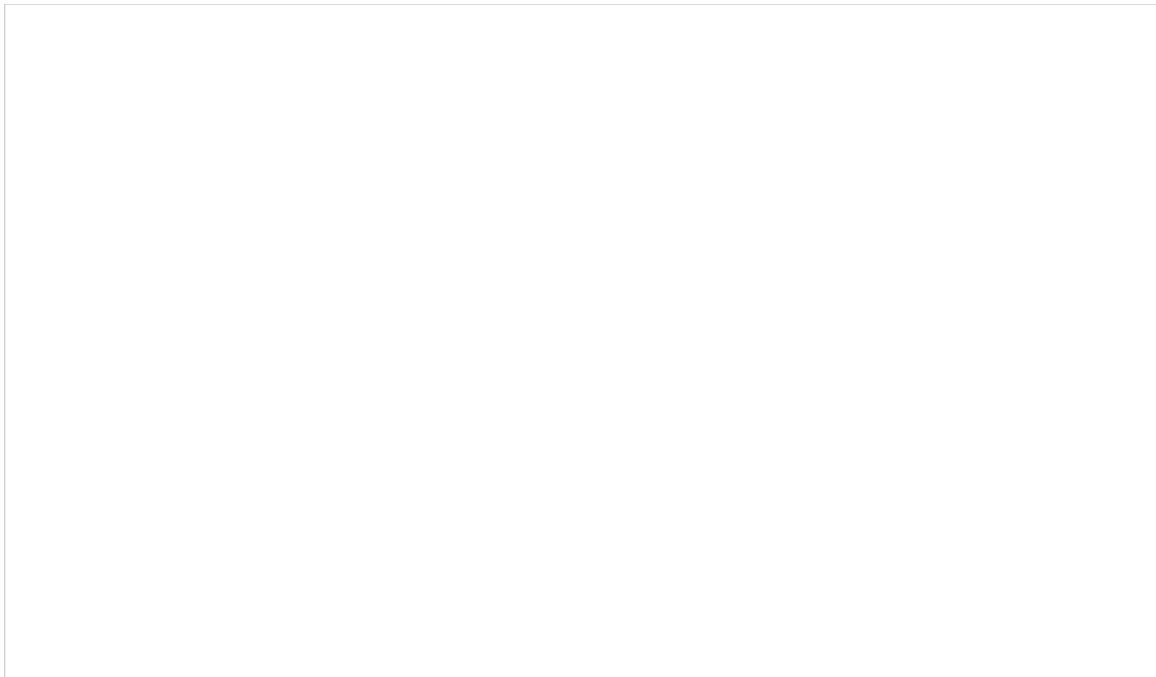
Step 1: Locate your chat scenario entry

1. In Contact Center Administrator, go to *Configuration > Scenario Entries > Messaging/Chat* and Select the desired chat scenario entry to view its properties.



Configuration > Scenario Entries >
Messaging/Chat

2. In the Properties tab, under *Web HTML snippet*, click the **HTML snippet** button.
3. The *HTML Snippet for Web Page* dialog will open.



HTML Snippet for Web Page dialog

Step 2: Enter your contact center's hostname and copy snippet

1. In the field **Specify client web server hostname**, enter your contact center's name (i.e., "example.brightpattern.com"). This action will populate the snippet with the hostname, making it ready to be copied.
2. Click **Copy to clipboard** to copy the snippet.
3. It looks like this:

```
<link type="text/css" rel="stylesheet" href="https://example.brightpattern.com/clientweb/chat-client-v4/css/form.css">
<script type="text/javascript">
  SERVICE_PATTERN_CHAT_CONFIG = {
    appld: '94066',
    apiUrl: 'https://example.brightpattern.com/clientweb/api/v1',
    tenantUrl: 'five.brightpattern.com',
    chatPath: 'https://example.brightpattern.com/clientweb/chat-client-v4/'

    /*
     // Default customer data, it can be collected on current site's context
     first_name: ,
     last_name: ,
     email: ,
     phone_number:
    */
  };
</script>
<script src="https://example.brightpattern.com/clientweb/chat-client-v4/js/init.js"></script>
```

Step 3: Edit default customer data parameters

Notice that in the code comments, some customer data parameters are given: first_name, last_name, email, and phone_number. This customer information is the default set of data collected from the chat's pre-chat form and is passed to the system during the chat interaction.^[1]

To pass custom variables through the chat, simply replace this:

```
/*
// Default customer data, it can be collected on current site's context
first_name: ,
last_name: ,
email: ,
phone_number:
*/
```

With the following, where "variable_name" is the name of your variable, and "Value" is the value:

```
parameters:{
variable_name: 'Value',
}
```

For example:

```
<link type="text/css" rel="stylesheet" href="https://example.brightpattern.com/clientweb/chat-client-v4/css/form.css">
<script type="text/javascript">
SERVICE_PATTERN_CHAT_CONFIG = {
  appId: '70a6624585ef2b0981fed84fcd12d4db',
  apiUrl: 'https://example.brightpattern.com/clientweb/api/v1',
  tenantUrl: 'example.brightpattern.com',
  chatPath: 'https://example.brightpattern.com/clientweb/chat-client-v4/',
  parameters:{
    test_var: 'Hello World',
  }
};
</script>
<script src="https://example.brightpattern.com/clientweb/chat-client-v4/js/init.js"></script>
```

Note: You should use either the default customer data parameters or your own parameters, but not both. Customer parameters use variable `$(item.externalChatData)` to collect all customer data from the pre-chat form. If you include both default and custom parameters, you will have duplicate entries of first_name, last_name, email, and phone_number.

For more information, see the *Scenario Builder Reference Guide*, section [Variables](#).

Step 4: Paste the snippet into your HTML file

Once you are done with step 3, paste the snippet into your HTML for use on your webpage.

1. [↑] Note that default variables like "name" can be passed without using parameters declaration.