5.8 Services

Bright Pattern Documentation

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Services & Campaigns Overview

In this section, you will learn how to configure services (e.g., voice, chat, email, etc.) for your contact center. The tutorials in this section are meant to help you get services up and running quickly.

For more information, see the *Contact Center Administrator Guide*, section Services and Campaigns Overview.

Tutorials

- Chat Service Configuration
- How to Configure Email Services
- Inbound Voice Service Configuration
- Outbound Messaging Campaign Configuration
- List Leads Outbound Preview Campaign Configuration

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 Email Services

This article describes how to configure email services 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 an email service

In the email service [Properties Tab](), plan the categorization of email interactions arriving at a particular email address, create the corresponding email services, and configure their general settings.

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

   Choose from the available services

4. In the Properties tab that appears, update the service properties.

   Email 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: Give agents the privilege to handle email

In *Users & Teams* > *Roles*, make sure the agents who will process email have the privilege **Handle email** granted to them.

Agent role and privileges

Step 4: Create an email scenario entry and establish account for incoming email

1. In *Scenario Entries* > *Email*, create an email scenario entry for your company's given email address. The scenario entry is the entry point for email service to and from customers.

2. In the scenario entry's **Account** tab, configure incoming email account settings. By configuring account settings, you are enabling your company emails to be opened and used in Agent Desktop.

3. If you do not know your POP/SMTP or Microsoft Exchange information, contact your service provider.

Email scenario entry > Account settings > Incoming mail

Step 5: Configure an outbound email account (optional)

If, within this service, you intend to send outbound emails that are not related to any existing cases, configure an outbound email account for this service.

Outbound email account settings appear in *Scenario Entries* > *Email* > *Account tab*.

Email scenario entry > Account settings > Outgoing mail

Step 6: Create a standard acknowledgment message

Using Knowledge Base, create the acknowledgment message that will be sent to customers automatically to confirm receipt of their email inquiries.

1. Go to *Call Center Configuration* > *Knowledge Base*.
2. Click the **Add article** (**+**) button to add a new Knowledge Base article.
3. In the **Answer** tab, fill in the email message body as desired. You can use the variable button to insert data variables, as shown in the example.

Add a Knowledge Base article

4. Optionally create additional articles in the [Knowledge Base](#) that will help agents process emails more efficiently.

Step 7: Define service settings

1. In the *Services & Campaigns* > *Email* > *[Email Tab](#)*, define all email-specific service settings.

Email tab properties

2. Beside **Acknowledgment**, click **<<None>>**, which will bring up the acknowledgement message you just created in the Knowledge Base, in step 3.

Select the email acknowledgment message from Knowledge Base

Step 8: Create the header and footer

Go to *Call Center Configuration* > *Email Settings* and update the email header and footer.

This is the system-wide text that will be inserted automatically above and/or below the main text of every email that is sent to a customer. You can include variables to plug in names, email addresses, and so forth.

Create the email header and footer

Step 9: Specify omnichannel settings for emails

Adjust Omnichannel routing settings, which let you specify the number of emails that agents can actively process on their Agent Desktop simultaneously.

Omnichannel routing settings

Inbound Voice Service Configuration

This article describes how to configure inbound voice service within Bright Pattern’s Contact Center Administrator application.

For inbound voice services with virtual queuing (callback option), see also Bright Pattern's Virtual Queue Tutorial.

Prerequisites

This article assumes that you have already completed initial configuration for your contact center.

Procedure

1. Create and configure an inbound voice service

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

   Choose from the available services

4. In the Properties tab that appears, update the 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.

Inbound voice service properties

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

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.

3. Create additional skills and assign them

1. If necessary, create language skills and any other auxiliary skills that may have to be taken into account when routing calls requesting this service.

You have to add skills before you can assign them

2. In *Users & Teams* > *Skill Levels*, use skill levels to assign the language and/or auxiliary skills to agents who will provide this service. 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.

4. Create the scenario for the service

1. Go to *Configuration* > *Scenarios* > *Chat* to create the voice scenario for this service.

2. Either select an existing voice 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 "Inbound Voice" template.

Select the "Inbound Voice" template

3. Creating a new 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**. You can come back to Scenario Builder later to edit the scenario.

Name the scenario

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

5. Associate the scenario with a service

1. Go to *[Scenario Entries](#)* > *[Dial-in](#)*.

2. Select the dial-in scenario entry that has been preconfigured for your contact center (typically “Voicemail”).

3. In the **Service** property, select the inbound voice property that you created earlier in this procedure. This associates the scenario entry with the inbound voice service.

Dial-in scenario entry properties

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

Note: The remaining steps are optional and depend on your workflows and reporting requirements.

6. 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

7. Specify dial-out information

1. Go to *Directory* > *Dial-out Entries* and select an entry from the list. A dial-out entry is an access number that has been assigned to your contact center by your service provider.

2. Update the entry properties, including phone number prefixes and caller ID, for outbound consultation calls.

Update dial-out entries properties

8. Set up periodic call recording exports

1. Go to *Services & Campaigns* > *Results tab*.
2. Under **Periodic Recording Export Jobs**, click **add**.
3. Update all the properties, specifying which call recordings should be exported and where they should go.

Periodic Recording Export Jobs properties

9. Configure caller ID

1. Go to *Services & Campaigns* and select your inbound voice service from the list of services.

2. Click on the Numbers tab and then on the **Caller ID** button to configure a caller ID for outbound SMS communications.

3. Click the **Add caller ID** (**+**) button.

4. Select your phone number from the list, and enter a state/province to be displayed.

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

10. Customize historical reports

Review the available service reports and, if necessary, customize them to your specific reporting needs.

Your inbound voice service configuration is now complete.

Service Configuration Quickstarts

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

- Chat Service Configuration
- Outbound Campaign Service Configuration
- Email Service Configuration

Outbound Messaging Campaign Overview

The purpose of an outbound messaging campaign is to automatically send a pre-configured SMS/MMS message to destinations specified in a calling list. You can use this type of campaign for a variety of tasks including appointment reminders, payment notifications, sales notices, case status updates, delivery information, and so forth.

This tutorial describes the steps involved with an end-to-end outbound messaging campaign:

- Prerequisites
- Create a List
- Create a Personalized Message
- Prep Ahead for Replies
- Calculate Campaign Duration
- Upload the List
- Configure the Outbound Messaging Campaign
- Run the Campaign
- Download the Campaign Results

Creating an Outbound Preview Campaign

The following tutorial describes how to create an outbound campaign container. Creating this campaign will later allow you to distribute the records from the list to your agents via the Agent Desktop.

Procedure

1. Login to Bright Pattern’s Contact Center Administrator.

2. Click *Services & Campaigns* from the left menu.
3. Choose the [*Properties*]() tab.
4. Click the " + " button on the bottom to add a new campaign.
    a. A *Create Service* window will open.
    b. There are seven radio buttons to choose from: *Inbound Voice, Outbound Voice, Blended Voice, Chat, Marketing, Email,* and *Outbound Messaging.*
        i. Choose "Outbound Voice." You could theoretically choose any of the options, but *Outbound Voice* allows your agents to contact your potential customers from the website form via calling out.
        ii. Click "OK."
5. In the right pane, make sure you are still on the *Properties* tab.
    a. Name the campaign.
    b. For this example, we have named our campaign "WebformPreview."
    c. Under the *Type* dropdown, choose "Outbound Voice."
    d. Scroll down to the "Require dispositions" checkbox and check it.
    e. Click "Apply."

Note that this is where you specify that dispositions are required for your campaign. Alt: Screenshot of Bright Pattern Contact Center Administration's Services and Campaigns Preview Properties pane with specific areas highlighted

6. Move one tab to the right to the *Assignments* tab.
    a. There are four groups to add to: *Teams, Administrators, Operators,* and *Reviewers.*
        i. Choose “add” to add the appropriate teams to each group.
        ii. This brings you to a blank team choice dropdown.
            1. In our example, we have chosen to add *Customer Service* to the *Teams* group.
            2. Click the green check mark to save.

Screenshot of an Add function dropdown box

        iii. Go down the list, adding whichever teams you deem appropriate to each group.
        iv. Next, select the desired Administrators for the campaign.
    b. When you are finished, click “Apply.”
7. Move one tab to the right to the *List* tab.
    a. Note: Pull up the bottom pane from the right side if you can’t see it initially.

Make sure to check the *Enabled* checkbox in the lower pane before clicking *Apply*. Alt:Screenshot of the Bright Pattern Services Campaign List setup form with important areas highlighted

8. To add a new list to the *Lists* tab, click the bottom right “ + “ sign.
    a. This will open the *Add Calling List* window with a blank field and a drop down.
        i. Click the drop-down menu and choose from the available lists.
            1. In our example, we are choosing *WebsiteFormLeadsCSV*.
        ii. Click “OK.”
    b. In the *Lists* tab, on the bottom pane, make sure the *Enabled* checkbox is checked.
        i. Click “Apply.”
9. Move one tab to the right to the *Dispositions* tab.
    a. There are two groups: *Outbound* and *Preview Record.*
        i. Clicking either shows you the list of available disposition reasons.
            1. These can be added to or edited at your discretion to fully adapt to your call center’s disposition needs.
        ii. For the time being, choose *Outbound*.
    b. Click “Apply.”

10. Move one tab to the right to the *Activity* tab.
    a. There is a checkbox labeled "Enable screenpop activity form" with a drop-down menu.

    b. Click the drop-down menu.
        i. Choose from the list of available forms.
            1. For our example, we have chosen *Info Form* from the *Creating an Activity Form* tutorial above.

        ii. Click "Apply."

11. Move one tab to the right to the *Numbers* tab.
    a. This is another two-pane tab.
        i. If necessary, drag the bottom pane on the right side upward.

    b. Click the " + " button on the bottom right to add a default Caller ID number to the available list and to specify which state/province the dialer is dialing from.
        i. This will open an *Add Caller ID* window.
            1. There are two fields: *Caller ID* and *State/Province*.
                a. Click the Caller ID drop-down menu to choose which number to dial from.

                b. Type into the empty text field which state or province in which this phone number is located.

                c. Click "OK."

    c. On the top pane, there are two choices: *Scenarios* and *Caller ID*.
        i. As we have not created any scenarios for this campaign, choose *Caller ID*.
            1. There are two drop down fields:
                a. Selection Method: This drop-down list selects how you wish the user to see the *Caller ID* number.
                    i. For this example, we have chosen "Default."

                b. Default: This gives the option to specify the default service/campaign caller ID number.

                c. Choose from the list of available numbers.

        ii. Click "Apply."

When choosing a phone number to be the default Caller ID, make sure that the number is in good working order. Alt: Screenshot of the Bright Pattern Service's Campaign Caller ID numbers setup pane

12. Move one tab to the right to the *[Outbound](#)* tab.
    a. There are five sub-tabs: *General, Calling Hours, Dial Rules, DNC,* and *Diagnostics.*

Alt:Screenshot of the Service and Campaign's Outbound tab sub-tabs

    b. Click on *[General](#)*.
        i. The first section has three fields: a *Type* drop-down menu, an *Enabled* checkbox, and *Status* buttons (Start and Stop)
            1. Type: Click the *Type* drop down and choose *Preview*.
                a. This is an outbound campaign that receives its information from a customer-initiated webform. It does not use *Predictive* or *Progressive* algorithms and *Automatic* doesn't apply in this situation.
            2. Check the *Enabled* checkbox so that the campaign is enabled and will be ready to use later.
            3. For the time being, leave the *Status* button on "Stop."
                a. Later, when you are ready to run the campaign, you will click the "Start" button and then "Apply."

Remember to enable the campaign here with the *Enabled* checkbox. Alt:Screenshot of Bright Pattern's Services and Campaigns Outbound General tab

   ii. The second section - Start/Stop Automation - does not need to be interacted with for this tutorial. Leave it alone.

   iii. The third section, *Preview Options*, has five fields.

   iv. For this tutorial, you only need the first three: the *Screenpop URL* field, the "Start dialing first number automatically" checkbox, and the "Start dialing after:" field.
      1. You pass in a website address into the *Screenpop URL* field if you wish the agent to see a specific website posted on their Agent Desktop form when interacting with this client.

      2. Click the "Start dialing first number automatically" checkbox if you wish your agent to have the phone number field fed to their dialer automatically.

      3. Enter a number of seconds into the "Start dialing after:" field to determine the wait time between the agent receiving the form information from the list.

   v. Click "Apply."

c. Click on *Calling Hours*.
   i. There are four sections in the *Calling Hours* tab: *Hours*, a "Phones to call, by preference" drop down, the "Use safe calling hours" checkbox, and "Comply with state calling hours" checkbox.
      1. The *Hours* section is where you can add and specify the hours of your calling center, as well as the hours that you will allow agents to call from this list for this campaign.

      2. The "Phones to call, by preference" dropdown is where you pass the phone number variable from the webpage form.
         a. In this example, it is "PhoneNumber".

         b. Click on the drop down and choose the phone variable.

         c. Click on the green checkmark to save.

Make certain to provide the variable from the form field beneath "Phones to call, by preference." Alt: Screenshot of Bright Pattern's Services and Campaigns Outbound Calling Hours section with the variable to pass in highlighted

        3. Check the "Use safe calling hours" only if you have collected zip code and address information from your website form. The system will check the provided zip code information against the time of day where the call is originating from to verify if it is an appropriate time to call the customer back.

        4. Check the "Comply with state calling hours" box if it is necessary that your call center requires this option.
            a. Example: A 24/7 call return form for plumbing emergencies would not need to comply with state calling time guidelines.

            b. Click "Apply."

d. Click on *[Dial Rules](#)*.
    i. Note: This section has an upper and lower pane. If you cannot see the lower pane, drag the gray bar up from the bottom to reveal the *Disposition Retry* pane.

    ii. The top pane of *[Dial Rules](#)* includes three fields: a "Maximum attempts per record" field, a "Maximum attempts per number" field, and an "Attempt all numbers in record first" checkbox.
        1. For the time being, leave the two "Maximum attempts" boxes as default. You can return later to adjust these sections to your desired specifications.

        2. Only check the "Attempt all numbers in record first" checkbox if you wish to cycle through all of the records in the website form list first before beginning the list again.
            a. If the list is particularly long, consider leaving this unchecked.

        3. The bottom pane is the *Disposition Retry* panel. It includes: *[Disposition](#)*, *Retries*, *Retry Interval*, and *Action*.
            a. By choosing each individual [disposition](#) and clicking the pencil icon on the bottom right, you can specify and streamline a time frame before your outbound agents can call the client back.

            b. For this tutorial, we will be leaving these as default.

iii. Click “Apply.”

This is the section where you can streamline how often to call or recall during your campaign. Alt: Screenshot of Bright Pattern's Services and Campaign's Outbound Dial rules with several areas emphasized

e. Click on Do Not Call (*DNC*).
    i. This section allows you to append a Do Not Call list (*DNC*) to your campaign by clicking the “add” link and choosing a DNC list from the available drop down menu.

    ii. In this tutorial, you will not be adding a DNC list.

    iii. Click “Apply.”

f. Click on *Diagnostics*.
    i. The *Diagnostics* page has one primary purpose: *Configuration Checks*.
        1. If the page is blank that means that your set up is sufficient so far.
            a. Click “Apply.”

        2. If the page is not blank, there will be a list of potential issues to be addressed beneath *Configuration Checks*.
            a. Example: You see the error: “Inconsistent assignment of teams to enabled campaigns”

with an “edit” link to the right. This means that you have assigned too many campaigns to one specific team.

b. Click on the “edit” link and it will take you to the issue in question, where you can fix it if you so wish.

3. When the *Diagnostics* error list is fixed to your satisfaction, click “Apply.”

If the indicated area in *Configuration checks* is blank, you do not have any issues to clarify." Alt: Screenshot of Bright Pattern's Services and Campaign's Outbound Diagnostic's page

g. The remaining three tabs (*Results, Archive,* and *Canned*) will not be needed for the rest of this tutorial.

h. Click “Apply.”

i. The basic Outbound Campaign is now set up.

List Leads Preview Campaign Tutorial

If your contact center receives leads from a website form, when your agents follow up with a lead, you want them to know the name of the person they are calling.

This can be accomplished by adding the customer’s information to an outbound preview campaign’s calling list as a new record. When the new record pops to an agent during the running campaign, a screenpop form will display the customer’s entered information.

This tutorial describes how to do the following:

- Create a .CSV calling list and this list with an outbound preview campaign
- Use the BPCC List API to pass customer information from the website to the .CSV calling list
- Configure an activity form that pops the list's information to the agent while the campaign is running

Prerequisites

In order to complete this tutorial, you will need to do the following first:

- Create a CSV calling list
- Configure an outbound preview campaign
- Be able to test the BPCC List API by making cURL requests in the terminal
- Ensure your user has API access

Create a New .CSV List File

The first step for this tutorial explains how to create a new .CSV calling list with spreadsheet software. The created spreadsheet will contain the information you wish to pass to the agents at the end of this tutorial.

Create List in Admin using a List Wizard

Adding a .CSV list using the wizard is a fairly straightforward process. This tutorial will step you through the finer points of how to upload the spreadsheet you just created.

Updating Lists

New lists imported via the list import wizard appear in the list view of*Lists*. You can update these lists manually or set up periodic automatic updates. In both cases, the list update procedure can be performed as needed during the actively running campaigns.

Once you have created and u, you can further update it as needed later.

- This can be done manually.
- Or through a periodic import.
- Or via API.

How to Give a User API Access

The next step of the tutorial details the two components required for any Bright Pattern Contact Center (BPCC) user to be able to use the various BPCC APIs: granting a user privileges and API secrets. Certain privileges are required in order to use specific APIs. Granting specific privileges allows the user to populate the list records, and the API secret key will then allow the system to execute further actions on behalf of the user via API.

Creating an Activity Form

Here you will create an activity form using the form builder. Building this form creates a screenpop for the spreadsheet information collected from your website (i.e., the customer names, emails, and phone numbers, etc.). This form will later provide this information to the agents in Agent Desktop.

This is an example of a very basic form. Using the provided fields, this screenpop builder can be as intricate or as simple as you need.

Note: In order to create an activity form, your user must have the *Configure Contact Forms and fields* privilege.

1. Login to Bright Pattern's Contact Center Administrator.
2. Click *Case & Contact Management* on the left menu.
3. Click *Forms*.
4. Click *Activity*.
5. Click the " + " button on the bottom left to add a new form.
    - A *Create Screenpop* window will open.
6. Rename the form at the top center by hovering over the text "Main Page" to the right of the gear icon.
    - A pencil icon will appear.
        - Click it and rename the page.
            - For this example, the page is named "Info Form."
        - Click "OK."
7. Scroll down the left pane until you reach the "Text" form control.
8. Drag and drop text controls onto the right hand pane until you have the same number of text controls as you have spreadsheet fields that you wish to pass to your agents.
    - Example: In the "TestWebsiteFormLeads" list, there are four fields that the agents will receive later - "FirstName", "LastName", "Email", and "PhoneNumber."
    - To match, you would drag and drop four text controls.

    These fields are going to create a list in Admin using the *List Wizard* and become the information your agents receive in Agent Desktop.

9. Once the appropriate controls are in place, hover over the top text field until a pencil icon appears.
10. Click the pencil icon.
11. A pop up editing window will appear named "Text Field Properties."
12. Make certain you can see the "OK" and "Cancel" buttons on the bottom.
    - If you cannot, resize the window by grasping the upper right corner and pulling down and to the left until you can see the "OK" and "Cancel" buttons.
13. Scroll down to "Options".
14. The "Editable" checkbox will be checked.
    - You do not want your agents to be able to change this information.
    - Uncheck the checkbox.
15. Scroll down to the "Initial Value" box.

16. This is the spot that we are passing in the variables from the list spreadsheet to the form.
17. For each text field that you have provided, you must change the *Initial value*.

    In the .CSV uploaded earlier we passed four fields (besides the ID) - “FirstName”, “LastName”, “Email”, and “PhoneNumber.”

    In the first text field, the *Initial value* would be:

    First Name: $(workitem.fullInfo.FirstName)

    In the second text field, the *Initial value* would be:

    Last Name: $(workitem.fullInfo.LastName)

    In the third text field, the *Initial value* would be:

    Email: $(workitem.fullInfo.Email)

    In the fourth text field, the *Initial value* would be:

    Phone Number: $(workitem.fullInfo.PhoneNumber)

    Each of the text fields will have the same “Initial value” field, only replacing the “FirstName” with the appropriate spreadsheet label variable. Alt:Screenshot of the Bright Pattern form builder text button variable creation page with Options and Initial Value highlighted

18. After each value is entered, click “OK.”
19. Once all the fields are filled, check to make sure none of the fields are editable and that all have the appropriate information passed in.

20. Click “Save.”
21. If you would like to improve the look of the form, you can add columns and labels.
    - Example: You would like your agents to see two columns on their screenpop - one with labels (*First Name, Last Name, Email,* and *Phone*) on the left hand side and the other with the fields passed in from the website on the right.
22. Hover your mouse near the center-top of the right pane beneath the gear icon and the *Preview/Save/Close* buttons.
23. A row of checkmark-capable boxes will appear. These are part of the Dynamic Layout Editor called the System Controls section, and they allow you to adjust the columns and define the number of sections that appear on the form.
    - For this example, we only want two columns.
    - Click the center checkbox.

    Checking only the center checkbox divides the form into two columns. Alt: Screenshot of the Bright Pattern form builder column creation checkboxes

24. Scroll down the left menu until you see the *Labels* button.
25. Drag and drop labels onto the left side of the form to match the fields you created earlier.
    - Example: Earlier, you created four fields that the agents will receive - “FirstName”, “LastName”, “Email”, and “PhoneNumber.”
    - To match, you would drag and drop four label controls.

    In this example, there are four blank labels to match the four fields created earlier. Alt: Screenshot of the Bright Pattern form builder with four labels to match the four fields in two columns

26. Hover over the top label and a pencil icon will appear.
27. Click on the icon.
28. A “Label Field Properties” box will open with two options: a *Style* drop down and a blank *Label* field.
    - On *Style*, click the drop down arrow and choose “Label”.
    - On *Label*, type the name of the label.
        - Example: The label to match the “FirstName” variable in the text field on the right could be “First Name” for the agent’s easy readability.
        - Click “OK.”

- Repeat for the other fields you wish to label.

29. Click “Save.”

These labels are named to match the text boxes on the right. Alt: Screenshot of the Bright Pattern form builder with four completely named labels to match the four fields in two columns

30. Verify that the labels correctly match the text variables in the parallel column.
31. Click “Save.”
32. Verify that the form was added to the forms list by going to section *Case & Contact Management* > *Forms* > *Activity*.
33. Your form name will appear in the center pane.

Creating an Outbound Preview Campaign

The next step for this tutorial requires creating an outbound campaign container. Building this campaign will later allow you to distribute the records from the list to your agents via the Agent Desktop.

Using cURL and the Terminal to Test List Import APIs

If you need to test Bright Pattern Contact Center (BPCC) REST APIs, note that you may do so by using cURL and your computer’s terminal. If your company maintains a website, it will use the server-side scripts to perform similar actions. Installing cURL for the Windows OS is a fairly simple process; Mac OS has cURL installed by default.

This step in the tutorial uses the BPCC List Management API to add a record to an existing .CSV list and then return all records from the list. For information regarding uploading calling lists, see *Tutorials for Admins*, section Lists.