Introduction to Genesys EchoScripting

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Echoscripting User Guide

Echoscripting is a scripting tool used to prompt agents through the call- handling process with customers. It can be used for either inbound customer service or outbound telemarketing calls. Echoscripting is a powerful tool that supports branching to guide agents through different paths of the script, depending on the customers' answers to scripted questions. Additionally, agents can capture information about customers and update the customer database, process orders, or track ongoing customer service calls.

You don't have to be a programmer to use Echoscripting. All that's required is that you understand your company's processes and its call- center needs.

Launching Echoscripting

From the Echocentral toolbar do the following:

1. Click the Echoscripting icon, as shown below.
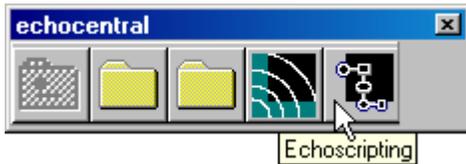
The Echoscripting login screen appears.
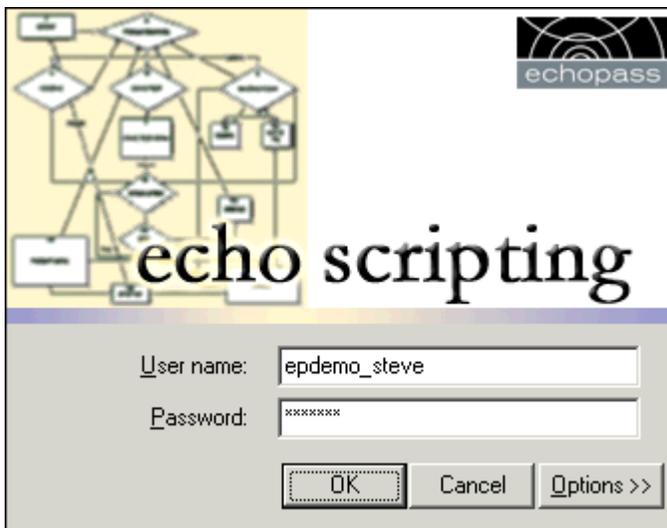
2. Enter the User name and Password.

    Clicking the *Options* button reveals the *Client* field, which allows you to define which Client Database to connect to. Contact your administrator for help with this field.

3. Click **OK**.

    You are now logged into Echoscripting and the application launches.

Using Echoscripting

After logging in, the Echoscripting main screen appears.
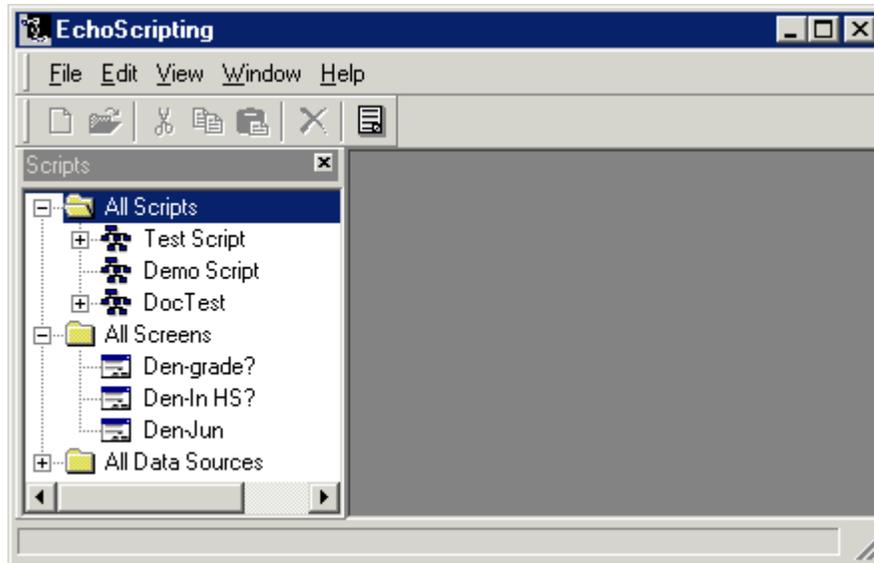
You can now begin creating new scripts for your company or editing existing ones. The above figure shows several existing scripts and screens in their respective folders.

Understanding Echoscripting

A script, shown in the *All Scripts* folder, is built using one or more screens, shown in the *All Screens* folder. Each screen is what the agent will see and read from during a call. In the script you can then link multiple screens together to create a conversation flow.

The following figure shows a sample script with multiple, linked screens in the working area.
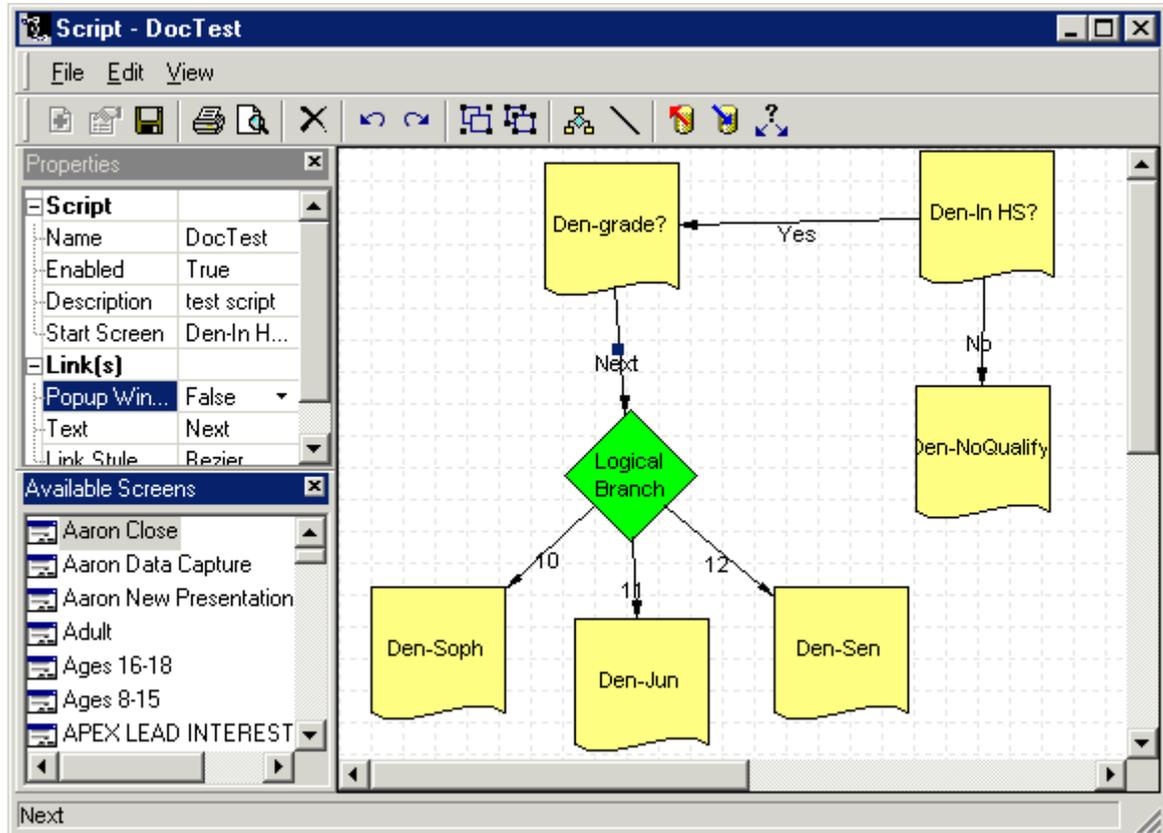
Which screen an agent sees during each depends on the customer's answers to questions. This enables administrators to guide agents through every phase of the phone call.

For example, in the above sample script the agent asks the customer if they are in high school. If the answer is no, the agent is shown a screen that says the customer does not qualify. If the customer answers yes, then the agent is directed to a screen that asks what grade they are in, giving the options of 10, 11, and 12. Depending on the selection, a grade-specific screen provides information that the agent can read to the customer.

Scripts can be even simpler than the sample shown above, or they can be very complex.

Building a New Script

You can easily build your own scripts. No programming experience is required. All you need is an understanding of the call-center needs of your company. The process for building your own scripts is as follows:

1. Create the screens

2. Create a script

   a. Drag your screens onto your script

   b. Create links between your screens

3. View your script

Creating a New Screen

The first step is to create screens for your script.

1. Right-click the *All Sceens* folder and select **New** from the pop-up menu.
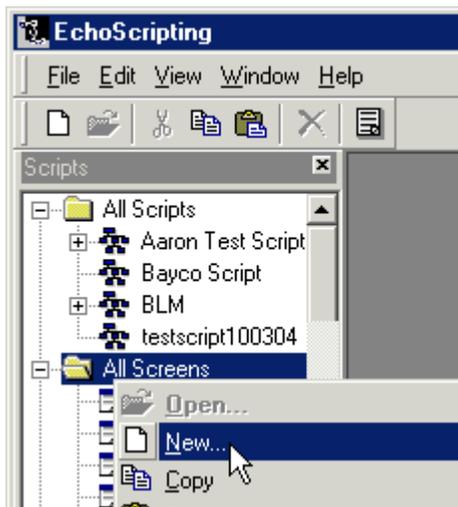
   A blank screen opens.

2. Give the screen a name in the *Properties* window.
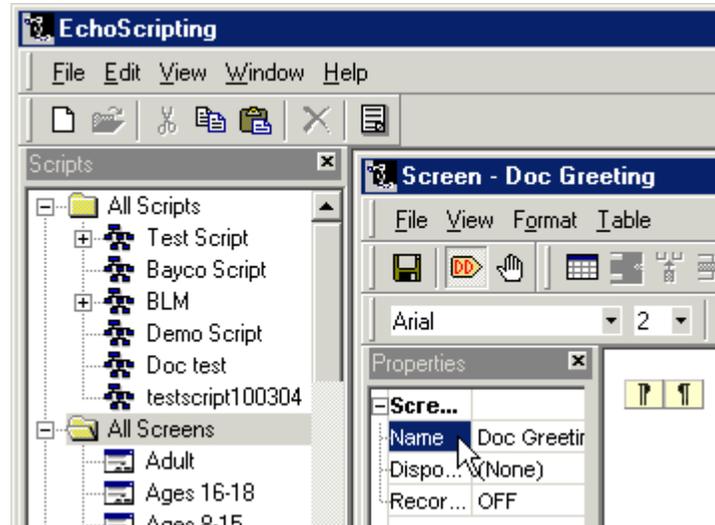
You may alternatively select any *Dispositions* (truncated in the above figure to show only *Dispo*) you want made available to agents from this screen.

Note: *Dispositions* are created by Genesys, defined in Echoscripting, and utilized in Outbound Manager. The default is to display all dispositions. To limit the dispositions available on a screen, select only those you want available from the respective screen (see document *Managing Outbound Campaigns*).

The *Recording* field (truncated above to show only *Recor*) allows you to toggle on or off the voice-recording feature. This feature is only available if you have purchased the *OnDemand* recording tool. Contact Genesys for help with this feature.

3. Click the Screen Window's **Save** icon to save the empty script.

    Once saved the screen will show up in the *All Screens* folder.

Adding Content to your Screen

Now that you have a blank screen you can begin adding elements. These elements include *Enhanced Text*, a number of tools included in the *Tool Box*, and database connectivity (see section below *Understanding Data Soruces*).

At the bottom of the screen editor window are two tabs that allow you to switch between the *Design View* and the *HTML Source* view of the screen. Echoscripting uses standard HTML for its screens, so feel free to use your own HTML editor or write your own HTML code directly in the *HTML Source* screen. You may also copy and paste Java code or other browser- supported scripting languages into the *HTML Source* screen.

The screen editor toolbar, shown below, includes icons to save the screen, toggle the display of Document Details, and to create and manipulate tables.

Using Enhanced Text

You can write anything you want your agents to say, like a script to a play. There is a text formatting toolbar at the top of the screen to help you design your screen as you please. This toolbar, shown below, is similar to what you will find in Microsoft Word or other word processors.
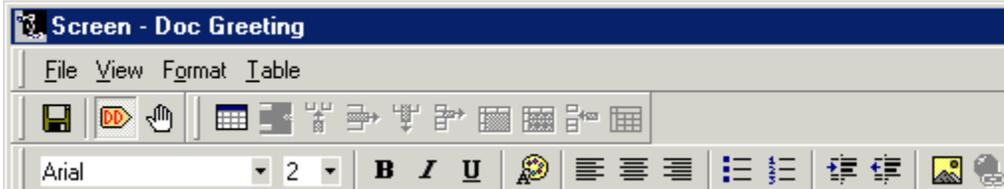
Using the Tool Box

Additional tools help you derive the exact information you want from customers, and help you guide your agents exactly how you want. These elements are offered in the *Tool Box*.

To use these tools, drag them onto the screen. Those that can contain data have *Properties*, which allow you to control every aspect of the element. The Properties box automatically opens when you drag one of these elements to the working area. You can also access the element properties by double-clicking any data element that is already on the screen.

- Combo Box – Allows you to create a pull-down list from which agents can choose options. It may contain an age range, income range, or any data set focused to your desired level.

¾ Properties

- o **Data Item Name** – select the database field you want connected to this element.

- o Data Description – provide your own description

- o Data Screen Tag – the database label, automatically generated when you select a Data Item Name

- o List – create options available in the pull-down box and assign a value to each option

- o Required – select whether this element is a required field

- o Required Empty Text – if the Required field is selected, you can specify a title, such as Select One. The field is then considered blank until something other than the defined title is entered.

- o ToolTip Position – defines the location relative to the field that an error message will display if an entered value is invalid (invalid format, nothing entered in a required field, etc).

- Hidden – Allows you to hide an element on the screen. You can pull data from your database to use in a calculation, but may not want that field viewable by your agents.

  ¾ Properties

  - o Data Item Name – select the database field you want connected to this element

  - o Data Description – provide your own description

  - o Data Screen Tag – the database label, automatically generated when you select a Data Item Name

  - o Hidden – always set to true

- Horz. Rule (HR) – Draws a horizontal line across the screen to provide visual separation.

  There are no properties for this element, but you can resize it horizontally and vertically.

- Label – Allows you to pull values from the database into your agent scripts. Encased as shown, [{(label)}], labels can pull data to personalize your screens or you can push data to your database. Genesys can create any custom values for your situation.

¾ Properties

  o Data Item Name – select the database field you want connected to this element

  o Data Description – provide your own description

  o Data Screen Tag - the database label, automatically generated when you select a Data Item Name

- Line Break (BR) – An HTML tag that allows you to start a new line from anywhere on the screen.

- List Box – Similar to a Combo Box, but all the options are showing in the box.

¾ Properties

  o Data Item Name – select the database field you want connected to this element

  o Data Description – provide your own description

  o Data Screen Tag – the database label, automatically generated when you select a Data Item Name

  o List – create options available in the pull-down box and assign a value to each option

  o Required – select whether this element is a required field

  o Required Empty Text – if the Required field is selected, you can specify a title, such as Select One. The field is then considered blank until something other than the defined title is entered.

  o ToolTip Position – defines the location relative to the field that an error message will display if an entered value is invalid (invalid format, nothing entered in a required field, etc).

- Paragraph – An HTML tag that starts a new paragraph. It is equivalent to two Line Break tags. This is the default tag used when you hit the Enter key.

- Password –A text box, as described below, that when text is entered displays asterisks instead of the text.

- ¾ Properties

  - o Data Item Name – select the database field you want connected to this element

  - o Data Description – provide your own description

  - o Data Screen Tag – the database label, automatically generated when you select a Data Item Name

  - o Edit Check – specify the field's format, such as numeric, alphanumeric, data, currency, etc

  - o Max Length – specify the maximum number of characters the field will accept

  - o Required – select whether this element is a required field

  - o Required Empty Text – if the Required field is selected, you can specify a title, such as Select One. The field is then considered blank until something other than the defined title is entered.

  - o ToolTip Position – defines the location relative to the field that an error message will display if an entered value is invalid (invalid format, nothing entered in a required field, etc).

- Space – An HTML tag used to insert a space or blank character.

- Text Area –Allows agents to enter any text, such as comments, into a database. Has a scroll bar on the right to allow you to scroll to see all the data entered. See figure below.

  - ¾ Properties

    - o Data Item Name – select the database field you want connected to this element

    - o Data Description – provide your own description

    - o Data Screen Tag – the database label, automatically generated when you select a Data Item Name

    - o Edit Check – specify the field's format, such as numeric, alphanumeric, data, currency, etc

    - o Required – select whether this element is a required field

    - o Required Empty Text – if the Required field is selected, you can specify a title, such as Select One. The field is then considered blank until something other than the defined title is entered.

- ToolTip Position – defines the location relative to the field that an error message will display if an entered value is invalid (invalid format, nothing entered in a required field, etc).

- Text Box –Allows agents to enter any text, such as a comment, into the database. Text can scroll beyond the viewing pane, but only the text in the box window will display.

  The following figure shows difference between a Text Area and a Text Box.
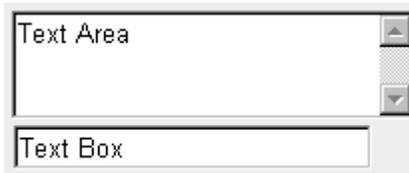
  ¾ Properties

  - Data Item Name – select the database field you want connected to this element

  - Data Description – provide your own description

  - Data Screen Tag – the database label, automatically generated when you select a Data Item Name

  - Edit Check – specify the field's format, such as numeric, alphanumeric, data, currency, etc

  - Required – select whether this element is a required field

  - Required Empty Text – if the Required field is selected, you can specify a title, such as Select One. The field is then considered blank until something other than the defined title is entered.

  - ToolTip Position – defines the location relative to the field that an error message will display if an entered value is invalid (invalid

Creating a New Script

You must now create a script to organize and link your screens together. Scripts can comprise the following elements:

- Screens – text scripts to be read by agents

- Data Sources – you can have agent screens pull or push values from/to your database (see section Understanding Data Sources)

  ¾ Properties

- ¾ Properties

  - o Data Source – specify the database to connect to

- Logical Branches – links to different screens based on answers to questions contained in screens

  ¾ Properties

  - o Data Item – specify the field in the database to base the branching decision on

- Links – links to different screens based on answers to questions contained in screens

  ¾ Properties

  - o Popup Window – Specify whether the subordinate screen will be a pop-up window. Useful for messages, FAQs, etc.

  - o Text – the link's name

  - o Link Style – specify the line style of the link

  - o Link Value – the value used to connect to subordinate screens and must correlate with the value defined in an option's value property

The script editor toolbar, shown below, has three icons on the far right that require some explanation. The Load and Save Data Source icons allow you to integrate your agent screens with data stored in a database. For more information on data sources, see section Understanding Data Sources below.

The last icon on the toolbar, Insert Logical Branch, allows you to include an if-then statement, based on data stored in the database.

The following steps will help you create your script:

1. Right-click the All Scripts folder and select New from the pop-up menu.
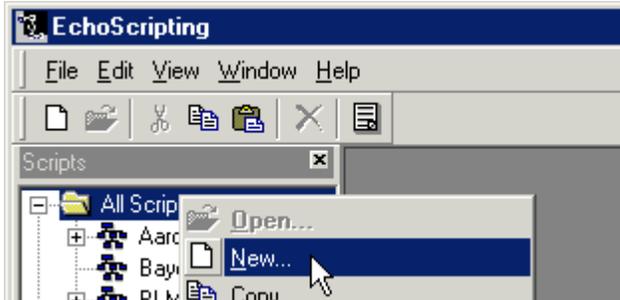
The Script editor window opens, displaying a blank grid, or working area.

2. Drag the desired screens from the All Screens folder to the script working area (grid).

a. Drag screens from the *Available Screens* window onto the script's grid (working area).

b. Define the script's properties in the Properties window.

The *Properties* window displays the following script properties:

o   Name. Defines the script's name.

o   Enabled. Allows you to create a script, but keep it turned off until you are ready to put it in production. Choices are True and False.

o   Description. You can enter anything you want in this field to use as a descriptor.

o   Start Screen. Allows you to specify which of the screens will be the first one agents will see.

3. Connect the screens with links to create the flow.

a.   Select a screen by clicking on it.

b.   Move the cursor over the center black dot of the screen until the cursor changes to a thin, black line with an arrow.

c.   Drag the cursor, which creates a line, to the appropriate screen. The line will connect the two screen icons.

d.   Define the link's properties in the Properties window.

When the link is selected in the working area, the Properties window expands to include the following link properties:

o   Popup Window. Specify whether the subordinate screen will be a pop-up window. Useful for messages, FAQs, etc.

- Text. The link's name, as displayed in the script. This field does not denote any hooks or links. See the Link Value field description below.

- Link Style. Different line styles follow different visual paths to link screens. This feature is most useful for complex scripts with many crisscrossing lines.

- Link Value. This value links an option in the parent screen to the appropriate subordinate screen. For example, if the parent script asks a yes/no question, then you might have one link named Yes pointing to one screen, and another link named No pointing to another screen.

4. Organize your script on the screen.

   a.   You can arrange the screens and links manually to make your script easier to follow visually. Or click the Auto Arrange icon to have Echoscripting automatically arrange your script for you.

5. Give the new script a name in the Name field of the Properties window, as shown below. Doc Test is the name we provided in the figure below.
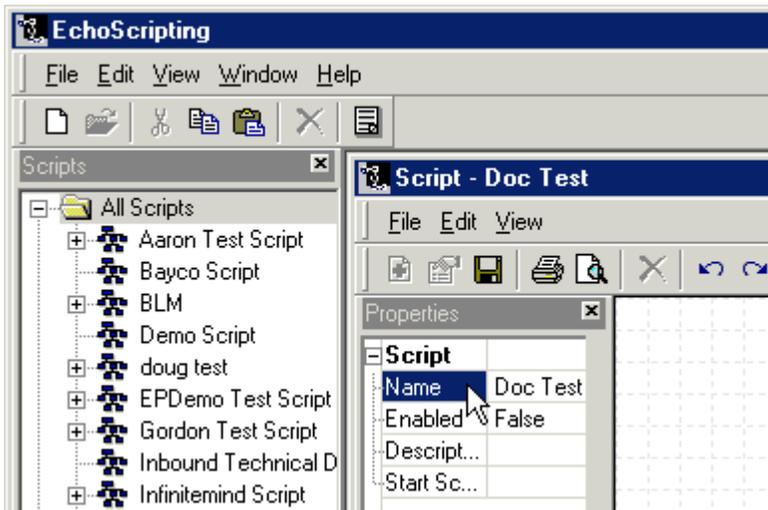
You may alternatively provide a description in the *Description* field (truncated in the above figure to show only *Descrip*

The Enabled field allows you specify whether you want to activate the script or not. Options are True or False.

The Start Screen field allows you to specify which of the screens to start with. This field is required if you have more than one screen.

Note: We recommend setting the Enabled field to True, providing a detailed Description, and specifying a Start Screen with every script—at least initially. This will enable you to preview the script to test it. After previewing the script and fixing any problems, you can then set the Enabled field to False, if needed.

6. Click the Script window's Save icon to save the script. Once saved the script will show up in the All Scripts folder.

7. Open screens from within the Script editor by double-clicking the screen icons on the Script editor grid. This allows you to make quick edits to screens without disrupting the script layout.

Previewing the Script

Preview the script by entering the following URL into your browser's address field:

http://scripting.echopass.com/default.asp?epclient=company-name

Replace the ending variable, '*company-name'*, with your company name. A list of all your enabled scripts will display in your browser.

Click the desired script name to preview. The script will preview in your browser, allowing you to navigate through the screens.

Understanding Data Sources

Echoscripting includes a database that allows you to gather, store, retrieve, and utilize customer data. The database is extensible, allowing you to create tables and columns as the need arises.

You can use a database to do the following:

1. Retrieve data stored in the database

2. Update data stored in the database

3. Create data to be stored in the database

Contact your database administrator or Genesys for more information on utilizing database connectivity for your strategy.

If so configured, data collected in the database can be emailed to you daily as a .CSV file.

There are two types of data elements:

Genesys Data Fields – These are used to pull data from your database to display caller- or agent-specific data in your scripts.

You must work with Genesys when adding Genesys data fields to ensure back-end compatibility. To add a Genesys data field do the following:

1. Expand the All Data Sources folder

2. Double-click the Genesys Attached Data sub-folder to open it.

3. Click the New Data Item icon to add a new data item to the Genesys database table.

4. Define the new data item by providing a Name, Description, Type, and Screen Tag.

   Note: The naming convention for Genesys Data Fields is EP followed by a descriptive name. For example, EPFirstName.

5. Save the data item by clicking the Save Data Item icon.

Non-Genesys Data Fields – These are used to capture data from callers and push it to your database.

To add a non-Genesys data field do the following:

1. Expand the All Data Sources folder

2. Double-click the Non-Genesys Attached Data sub-folder to open it.

3. Click the New Data Item icon to add a new data item to the Non-Genesys database table.

4. Define the new data item by providing a Name, Description, Type, and Screen Tag.

5. Save the data item by clicking the Save Data Item icon.

The All Data Sources Folder

Located on the main Echoscripting page, the All Data Sources folder provides a hierarchical view of the database. Expand the folder and you will see tables.

To customize your table, double-click the table, click the New Data Item icon, enter the name of the data item and click the Save Data Source icon.

The Data Sources Element

Another feature of Echoscripting is the support for External Data Sources. This feature allows you to load and save data to an external data source. Currently the only external data source supported is salesforce.com. Other data sources can be supported through Professional Services. Contact Genesys for more information.

To add a data source to your script, click the Load Data Source or Save Data Source icon on the script editor toolbar. Select Salesforce data in the item's Data Source field.

You will need to have an account with salesforce.com to utilize this capability. Genesys for help implementing this feature.

The Logical Branches Element

Logical Branches, another tool accessible from the script editor toolbar, allows you to create dynamic scripts based on values stored in the database. This allows complex scripts to guide agents through the call- handling process.

A Simple Script Walkthrough

Let's create a simple agent script that guides an agent through a technical support call. We want to provide product-specific support information for four hardware categories: computer, monitor, keyboard, and mouse.

Creating the Main Screen

Every script must have at least one screen, and if multiple screens are used one must be defined

1. Create a new screen.

2. Write any text that you desire. The main screen typically contains a greeting, asking the customer for an account number, phone number, etc, and asking the nature of the problem.

3. Create four new screens, naming them Computer, Monitor, Keyboard, and Mouse. The screens can be left empty for our example.

Creating the Script

In the above sample we created a main screen and four subordinate screens. We will now create a script and link the screens together.

1. Create a new script.

2. Drag the screens onto the script.

3. Create links to the four newly added screens.

There are two ways to link the subordinate screens to the parent screen; using the simple links or using data sources. We'll discuss both methods and when each is recommended.

¾ Using Simple Links

a. Create links from the main screen to the four subordinate screens.

b. Name the links the same as the screens they are pointing to.

> Your links should be named *Computer*, *Monitor*, *Keyboard*, and *Mouse* and should point to the appropriate subordinate screens as shown below.
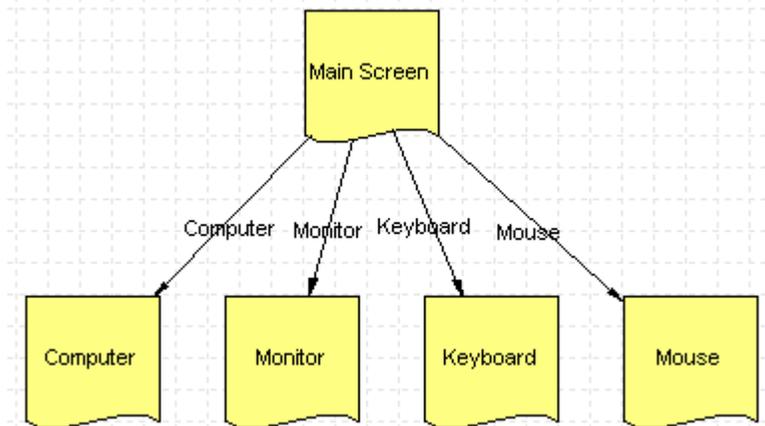
¾ Using Data Sources to Dynamically Link Screens

It takes more work up front to use data sources, but it allows you to create more powerful, dynamic scripts.

1. Create the Data Source

a.   In the Echoscripting main screen, expand the All Data Sources folder. This shows the tables of the Echoscripting database.

b.   Open the desired table by double-clicking on it (you may have only one table or several). The Data Source screen opens.

c.   Click the New Data Item icon at the top of the screen.

d.   Enter a name in the Name field.

e.   Click the Save Data Item icon. The Data Item window closes.

f.   Close the Data Source window.

2. Edit the Main Screen and add a List Box from the Tool Box.

a.   Drag the List Box from the Toolbox to the desired location on the screen working area. The Properties window automatically opens for the List Box.

b.   Click on the List field, then click on the '…' icon that appears in the value column.

c.   The Combo Box Values window opens, which is where you enter the different options you want available in the List Box.

d. Enter Computer in the Caption field. The Value field allows you to specify a value for if/then statements, which we'll discuss shortly. The Value field is optional, as Echoscripting will use the Caption as the value if none is specified.

e. Click the Insert button. The item will be added to the list.

Repeat until all the options are entered.

f. Create a title for the List Box, or delete the default [LISTBOX] title altogether.

g. Click the Update button.

h. Click OK when the List Box is complete. You may optionally define additional List Box properties.

i. Close the Properties window.

The following Figures show the window to create a List Box and the resulting List Box at right.
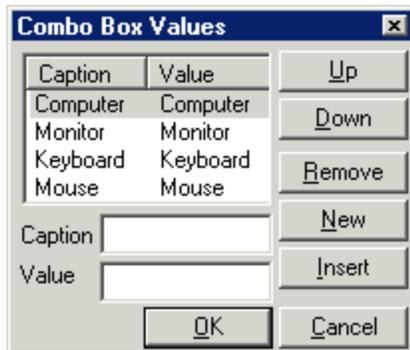
The steps above can be used with any data element in the Toolbox, whether it is a Combo Box, List Box, Text Area, or Text Box.

3. Configure your List Box to use the newly created data source.

a. Open the List Box Properties window.

b. In the Data Item Name field, select the name of the database field you just created.

c. Close the Properties window.

d. Save and close the screen.

4. Add a Logical Branch to the script.

a. Insert a Logical Branch between the Main Screen and the subordinate screens.

5. Configure the Logical Branch to use the newly created data source.

    a. Open the Logical Branch Properties window.

    b. In the Data Item field, select the name of the database field you just created.

6. Link the screens together.

    a. Create a link from the Main Screen to the Logical Branch. Name this link Next.

    b. Create links from the Logical Branch to the subordinate screens. Name them the same as the screens they are pointing to.

    Following is how the script will look:
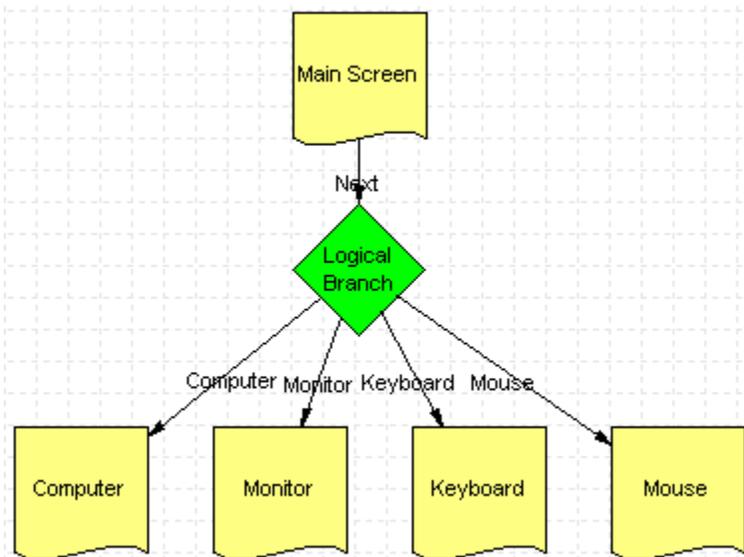
7. Configure the links from the Logical Branch to use the newly created data source.

    a. Select the link titled Computer.

    b. Enter the name of the target screen in the Link Value field. For example, enter Computer for the first link.

   Repeat the above step with all links leading from the Logical Branch.

8. Save the script.

Viewing the Script

Your scripts can be made viewable on the Internet for testing purposes. But first you must enable the script for this feature.

1. Go to the Script Properties window.
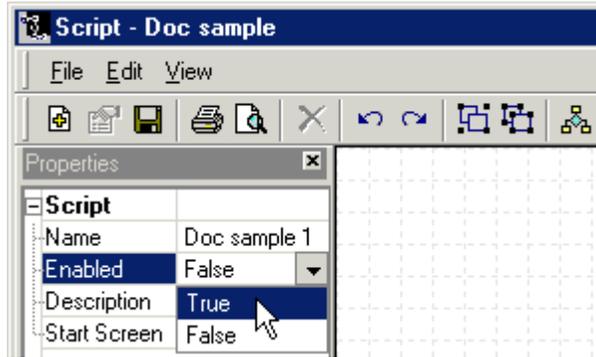
2. Set the Enabled field to True.

3. Enter the following URL into your browser's address field:

http://scripting.echopass.com/default.asp?epclient=company-name

Replace the ending variable, '*company-name'*, with your company name. The Script Preview screen will open in your browser, listing all the scripts you have enabled.

4. Click the script you want to preview.

The script will preview in your browser as shown below:
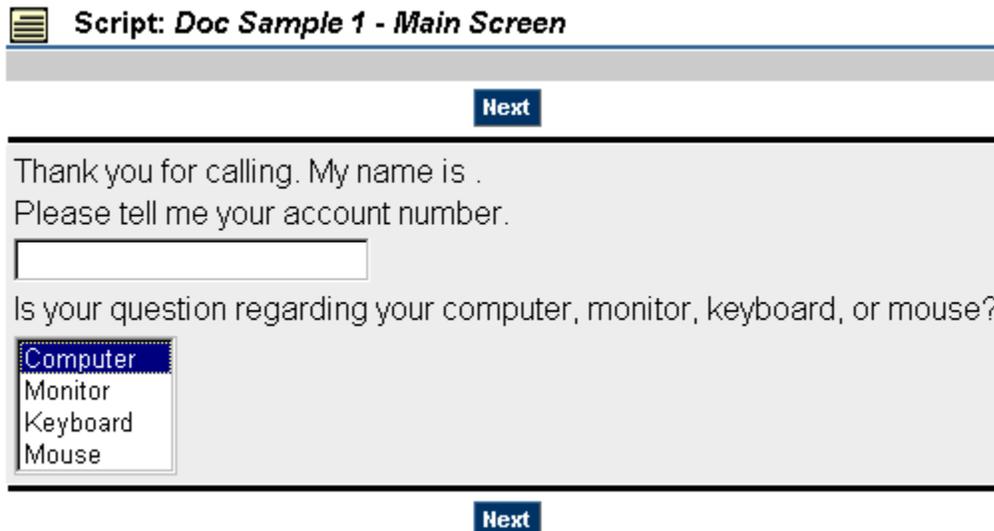
Above is the sample script using *Data Sources*. Notice the *List Box* and only one button, labeled *Next*.
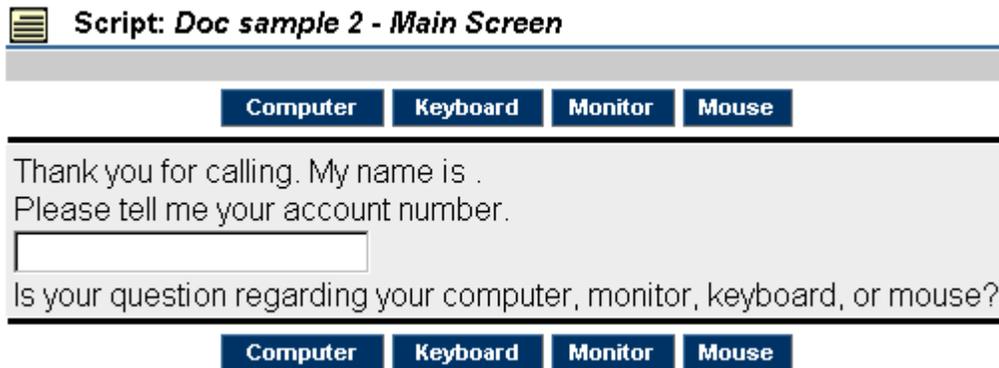
Above is the sample script using simple links. Notice that instead of a List Box, the agent must select the link to the appropriate page.

You will also notice that data items are not shown. The figures above show the line "My name is ." When we created the Main Screen, we inserted a Label data element to pull the agent's login name, but it will only work when the script is put into production.