5.3 Forms

Bright Pattern Documentation

Generated: 5/19/2022 12:04 pm

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Overview

The following is a list of sections in the Contact Center Administrator application, section Forms. Note that forms are configured in the Form Builder application. For more information, see the *Form Builder Reference Guide*.

- Activity
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- Contact
- Case
- Augmentation

Activity History Forms

Activity History forms are used to pull specific information from the activity forms agents fill out during interactions; this information is then saved to the case and contact history corresponding to the interaction. This information is accessible in Agent Desktop, section Search & Preview Records.

Activity History forms are configured by service type (i.e., voice, chat, email) and may contain custom fields, including custom Activity History fields. You can configure multiple Activity History forms, and forms can be set as either default or service-specific. **Note**: In Agent Desktop, Activity History forms are always **read only** (i.e., they are never editable).

For more information, see the *Form Builder Reference Guide*, section How to Configure Activity History Forms.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making any changes to activity history forms, we recommend that all affected logged-in agents refresh their browser page.

How an Activity History form containing a custom Activity History field looks in Agent Desktop

Working with Activity History Forms

To create or edit an Activity History form, navigate to *Forms* in the root menu and select the**Activity History** option. The list in the left pane will list the existing forms. For general information about creating forms, see the Form Builder Reference Guide.

Activity History form settings

How to Add a Form

1. Click the **Add new form** button.
2. The Create Contact Form window will pop and you will select the appropriate service type (i.e., chat, email, or voice).
3. In the Form Builder application that opens, customize the form by dragging controls onto the form canvas and editing their properties.

New forms are configured per service type

How to Edit a Form

1. Select a form in the list of forms that appears.
2. Click the **Edit** button.
3. In the Form Builder application that opens, customize the form by dragging controls onto the form canvas

and editing their properties.

How to Delete a Form

1. In the list of forms that appears, select the form you wish to remove.
2. Click the **Delete** button.

How to Clone a Form

1. In the list of forms that appears, select the form you wish to duplicate.
2. Click the **Clone form** button.
3. The duplicated form will appear in the list with name "Clone of <Name of Original Form>".

How to Import a Form

1. Click the **Import form** button.
2. In the dialog that appears, enter the name of the form you wish to import, browse for the file, and click **Upload**.
3. The imported form will appear in the list.

How to Export a Form

1. In the list of forms that appears, select the form you wish to export.
2. Click the **Export form** button.
3. The form will be downloaded immediately.

Properties Tab

The Activity History form properties are described as follows.

Properties tab

Name

Name is the name of the selected form. You can change the name of a form either here or in the Form Builder application.

Type

Type is the type of service associated with the form (i.e., chat, email, or voice).

Default form if a service has no activity history form

When selected, this checkbox allows you to specify an Activity History form as a default for a given service.

Service

Click **add** to assign the configured form to a specific, configured service.

Contact

Bright Pattern Contact Center stores information for all contacts, including both the users in your contact center and the external people and organizations that users interact with, on the Agent Desktop application. This information can be accessed in the Agent Desktop application's Contacts section, or in the Active Conversation List's directory. Contact information is displayed in the contact details, activities, calendar events, and cases associated with each contact.

Contact information populates the various fields that are created in *Contact forms*. The forms are configured in the Contact Center Administrator application, while the form fields are edited in the Form Builder application.

Contact forms

Working with Contact Forms

To create or edit a form, select the **Contact** option from the root menu of Contact Center Administrator (*Configuration* > *Forms* > *Contact*). The left pane will list the existing forms. Note that forms configured for your contact center are listed in this application, but they are built and edited in the Form Builder application.

For more information about creating forms, see the Form Builder Reference Guide.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making any changes to contact forms, we recommend that all affected logged-in agents refresh their browser page.

Use these buttons to add, edit, delete, import, and export forms

How to Add a Form

1. Click the **Add new form** (**+**) button.
2. Select the type of form to add: **Contact Detail** or **Contact Preview**.
3. In the Form Builder application that opens, customize the form by dragging controls onto the form canvas and editing their properties.

How to Edit a Form

1. Select a form in the list of forms that appears.

2. Click the **Edit** button.
3. In the Form Builder application that opens, customize the form by dragging controls onto the form canvas and editing their properties.

How to Delete a Form

1. In the list of forms that appears, select the form you wish to remove.
2. Click the **Delete** button (**X**).

How to Clone a Form

1. In the list of forms that appears, select the form you wish to duplicate.
2. Click the **Clone form** button.
3. The duplicated form will appear in the list with name "Clone of <Name of Original Form>".

How to Import a Form

1. Click the **Import form** button.
2. In the dialog that appears, enter the name and type of the form you wish to import, browse for the file, and click **Upload**.

   Import a form
3. The imported form will appear in the list.

How to Export a Form

1. In the list of forms that appears, select the form you wish to export.
2. Click the **Export form** button.
3. The form will be downloaded immediately.

Contact Form Properties

Names are assigned to Contact forms using the *Properties* tab. The Contact form properties are described as follows.

Contact form properties

Name

Name is the name of the selected form. You can change the name of a form either here or in the Form Builder application.

Type

There are two types of Contact forms: Contact Detail and Contact Preview. Note that the type is added when the new form is created.

The Contact Detail form includes all available information for a person or organization, such as first and last name, title, home/mobile/fax number, email address, physical address, company information, and summary.

The Contact Preview form includes fewer fields, such as name, title, email address, and phone. These fields provide a snapshot of the contact's information.

Default form for this type

Select the checkbox for *Default form for this type* if this Contact form is to be the default for that specific type (i.e., Preview or Detail).

Client Partitions

This section is reserved for future use.

Case

In the Agent Desktop application, agents use Case forms to add information about contacts, document notes about interactions with contacts, and initiate emails to contacts. The fields shown on Case forms are edited in the Form Builder application, and saved forms are listed here in the Contact Center Administrator application, in *Case & Contact Management* > *Forms* > *Case*.

Case form configuration

The following is an example of case form as it appears to an agent working in Agent Desktop. During an active call, the agent creates a new case for the caller. This case form appears, providing form fields for the agent to complete (e.g., Title, Category, Notes, etc.). The agent is able to add information about the call and save notes to the case. Such a form is created and modified in the Form Builder application. For more information about creating and editing forms, see the sections that follow.

Example of a case form during an active call

Properties

In the *Properties* tab, you can rename a Case form and enable it to be used as a default Case form.

Case form properties

Name

Name is the name of the selected form.

Type

Type is the type of form. Note that for Case forms, there is only one type (i.e., Case), and it's set automatically.

Default form for this type

Select the checkbox for *Default form for this type* if this form is to be the default for all Case forms.

Client Partitions

To assign the selected Case form to a client partition, click the **Client Partitions** tab. This tab displays partitions to which the form is already assigned, and it allows you to change those assignments as well. Click **edit** to select partitions and assign them to the Case form.

Client Partitions tab

Working with Case Forms

To create or edit a form, select the **Contact** option from the root menu of Contact Center Administrator (*Configuration* > *Forms* > *Case*). The left pane will list the existing forms. Note that forms configured for your contact center are listed in this application, but they are built and edited in the Form Builder application.

For more information about creating forms, see the Form Builder Reference Guide.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making any changes to case forms, we recommend that all affected logged-in agents refresh their browser page.

Use these buttons to add, edit, delete, import, and export forms

How to Add a Form

1. Click the **Add new form** (**+**) button.
2. In the Form Builder application that opens, customize the form by dragging controls onto the form canvas and editing their properties.

How to Edit a Form

1. Select a form in the list of forms that appears.
2. Click the **Edit** button.
3. In the Form Builder application that opens, customize the form by dragging controls onto the form canvas and editing their properties.

How to Delete a Form

1. In the list of forms that appears, select the form you wish to remove.
2. Click the **Delete** button (**X**).

How to Clone a Form

1. In the list of forms that appears, select the form you wish to duplicate.
2. Click the **Clone form** button.
3. The duplicated form will appear in the list with name "Clone of <Name of Original Form>".

How to Import a Form

1. Click the **Import form** button.
2. In the dialog that appears, enter the name and type of the form you wish to import, browse for the file, and click **Upload**.
3. The imported form will appear in the list.

How to Export a Form

1. In the list of forms that appears, select the form you wish to export.
2. Click the **Export form** button.
3. The form will be downloaded immediately.

Augmentation

Augmentation forms allow your contact center to display and merge contact information from external databases (e.g., an integrated CRM or The Data Group) in order to provide additional or background information for selected contacts. Augmentation forms are configured in the Contact Center Administrator application, and the fields shown on Augmentation forms are edited in the Form Builder application..

Augmentation form configuration

Properties

Names are assigned to the Contact forms using the *Properties* tab. The Contact form properties are described as follows.

Augmentation form properties

Name

Name is the name of the selected form.

Type

Type is the type of form. Note that for Augmentation forms, there is only one type (i.e., Augmentation).

Default form for this type

Select the checkbox for *Default form for this type* if this form is to be the default for all Augmentation forms.

Client Partitions

To assign the selected Augmentation form to a client partition, click the **Client Partitions** tab. This tab displays partitions to which the form is already assigned, and it allows you to change those assignments as well. Click **edit** to select partitions and assign them to the Augmentation form.

Client Partitions tab

Working with Augmentation Forms

To create or edit a form, select the **Contact** option from the root menu of Contact Center Administrator (*Configuration* > *Forms* > *Augmentation*). The left pane will list the existing forms. Note that forms configured for your contact center are listed in this application, but they are built and edited in the Form Builder application.

For more information about creating forms, see the Form Builder Reference Guide.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making any changes to augmentation forms, we recommend that all affected logged-in agents refresh their browser page.

Use these buttons to add, edit, delete, import, and export forms

How to Add a Form

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2. In the Form Builder application that opens, customize the form by dragging controls onto the form canvas and editing their properties.

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1. Click the **Import form** button.
2. In the dialog that appears, enter the name and type of the form you wish to import, browse for the file, and click **Upload**.
3. The imported form will appear in the list.

How to Export a Form

1. In the list of forms that appears, select the form you wish to export.
2. Click the **Export form** button.
3. The form will be downloaded immediately.