

5.3 How to Configure Activity Forms

Bright Pattern Documentation

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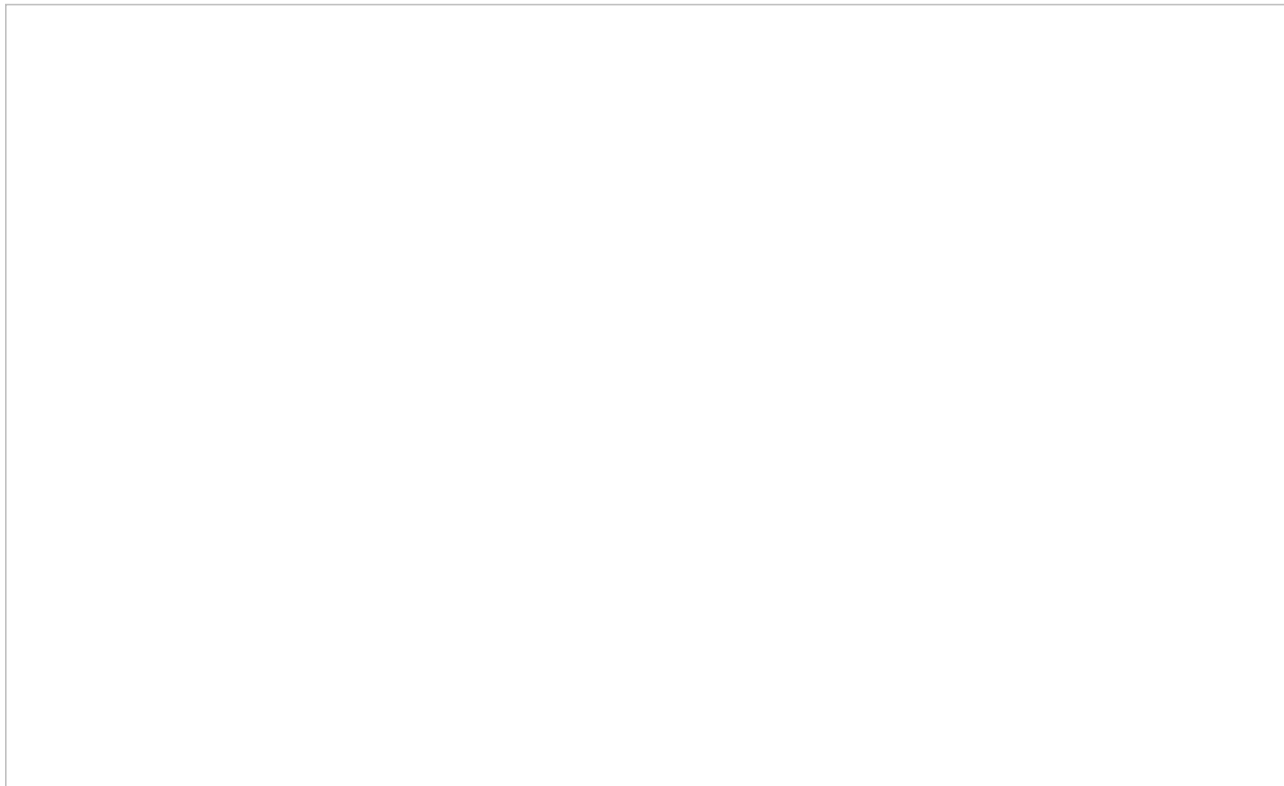
How to Configure Activity History Forms

Activity History forms contain 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 article will show you how to configure an Activity History form with custom Activity History fields. Note that an activity form must be configured with information related to that found in the Activity History form in order for the information to show up in the case and contact history corresponding to the interaction.

What is the difference between an activity form and an Activity History form?

Where an activity form is something an agent interacts with directly in Agent Desktop, an Activity History form is an exact opposite; that is, it is a static form containing only data that was collected in a related activity form. Activity History forms are not editable.



Activity History form configuration

Prerequisites

If you wish to include custom Activity History fields in your form, you must configure them first. For more information, see the *Contact Center Administrator Guide*, section [Custom Fields > Activity History](#).

Procedure

Action 1: Create an Activity Form

In order for an Activity History form to work, we must configure an activity form first. Reminder: Activity History forms are populated with information entered in activity forms.

Beginning in the Contact Center Administrator application, section [Forms > Activity](#), configure a form then launch the Form Builder application.



Configuring an activity form

Action 2: Map Activity History Values to Form Fields

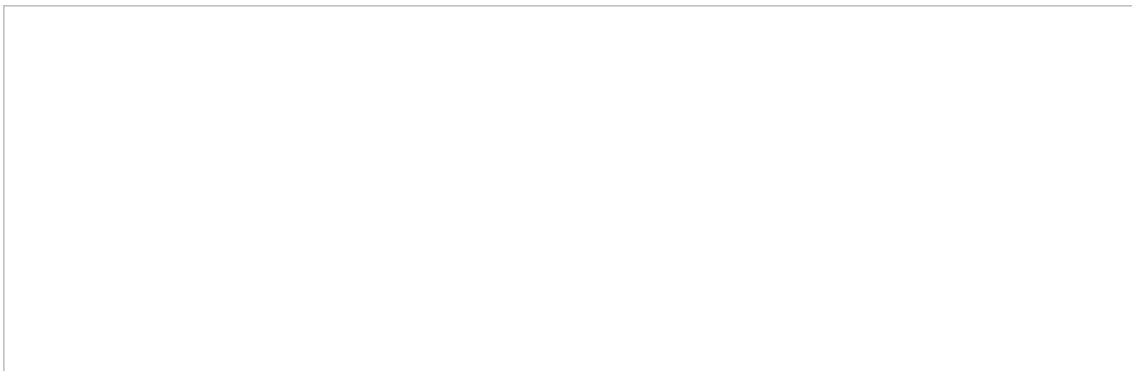
In the Form Builder application, begin adding the types of fields you want your agents to fill out. When editing the field properties, you will need to map Activity History field values to your form fields.

To do this, select the **data field** button. This will pop a window with the data fields you can map to a given form field. From here, you will choose from the selection available under *Activity History*, including any custom Activity History fields.



Mapping a form field to a custom Activity History field

In our example, we added a [list field](#) to our form and mapped a custom Activity History field "verified_product" to it. Additionally, we added a non-editable [Global Interaction ID](#) field to the form. Note that your form fields will behave in the way you configured them to; however, the value of whatever is entered in the field is associated with Activity History.



A preview of the activity form with the custom Activity History field

Action 3: Create an Activity History Form

Back in the Contact Center Administrator application, section [Forms > Activity History](#), configure a form then launch the Form Builder application. As a reminder, Activity History forms are configurable per service type (i.e., chat, email, voice).



The Activity History form in the Form Builder application

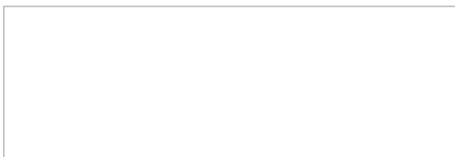
Action 4: Map the same Activity History Values to the New Form Fields

In the Form Builder application, begin adding the desired fields. Because Activity History forms are connected to activity forms, we will configure our new form fields to contain the same Activity History mapping and information. In this example, our Activity History form contains the same "verified_product" and Global Interaction ID field mapping.



The same Activity History fields from the activity form are added to the Activity History form

When configuring Activity History forms, it is important to note that they are ultimately displayed in Agent Desktop as **read only**. So, while it is possible to add field types to the form that are normally editable (e.g., [list](#), [phone number](#), [text](#), etc.), they will not function this way for Activity History forms.



A preview of how the non-editable Activity History form looks

Your Forms In Action

Activity History forms contain data from activity forms, so you will want to review how both forms function in the Agent Desktop application. First, ensure the behavior of your activity form is correct, making sure the fields mapped with Activity History values are filled out. In our example, the Verified Product list field has the option "Yes" selected.



The activity form when popped in Agent Desktop

Next, going to section Search & Preview records, we find the appropriate contact, select the *Activities* tab, and under the most recent interaction, we see the Activity History form with the information from two matching fields on the activity form.



How the Activity History form looks in Search & Preview records

1. REDIRECT [5.3:Contact-center-administrator-guide/CaseandContactManagement/CustomFields](#)
1. REDIRECT [5.3:Contact-center-administrator-guide/CaseandContactManagement/Forms/ActivityForms](#)

1. REDIRECT [5.3:Contact-center-administrator-guide/ServicesandCampaigns/ActivityTab](#)

1. REDIRECT [5.3:Contact-center-administrator-guide/CallCenterConfiguration/KnowledgeBase](#)
1. REDIRECT [5.3:Contact-center-administrator-guide/CaseandContactManagement/Forms/ActivityForms](#)