

5.3 Form-Building Exercises

Bright Pattern Documentation

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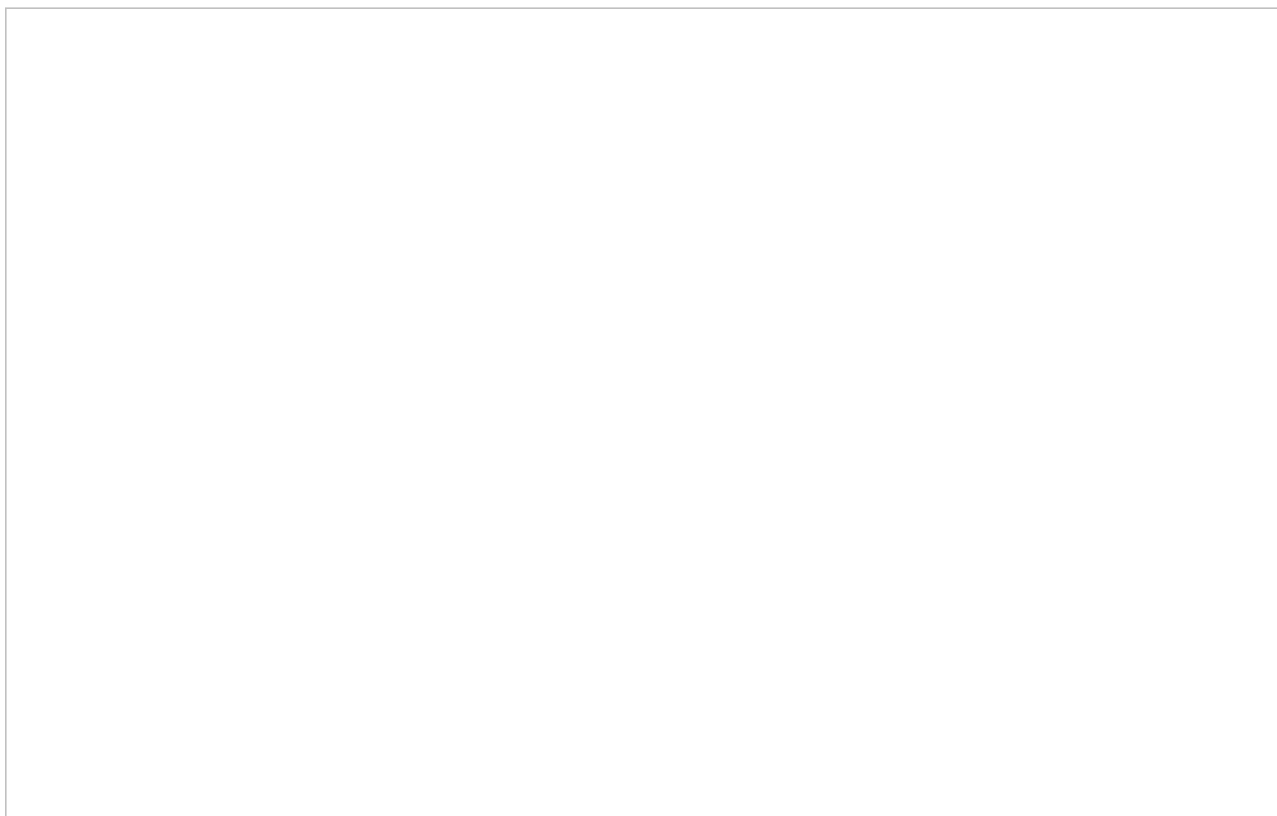
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How to Configure Activity Forms

Activity forms are forms that agents interact with directly in Agent Desktop and can be used for a wide variety of purposes; however, the main purpose of activity forms is to collect information during interactions. Note that activity forms are used to collect and pass information to [Activity History forms](#).

This article will show you the steps necessary for configuring activity forms in the Contact Center Administrator application and Form Builder application.



Activity form configuration in the Contact Center Administrator application

Prerequisites

Activity form fields can be mapped to custom fields for [contact](#), [company](#), and [Activity History](#). In order to do this, you must configure these custom fields first. For more information, see the *Contact Center Administrator Guide*, section [Custom Fields](#).

Procedure

Step 1: Configure an Activity Form in the Contact Center Administrator Application

Beginning in the Contact Center Administrator application, section [Forms > Activity](#). Click the **Add new form** button, which launches the Form Builder application.

Step 2: Create Your Form in the Form Builder Application

In the Form Builder application, begin adding the types of fields you want your agents to see and interact with. Note that the fields can be interactive or static (i.e., you can configure a field be **editable** or not).



Configuring an activity form

When configuring your form, you may choose to map custom field values to your form fields. Mapping custom field values to form fields allows data entered in the form fields to be passed to other forms and reports.

To map custom field values, when editing the a field's properties, select the **data field** button. This will pop a window with the data fields you can map to a given form field.



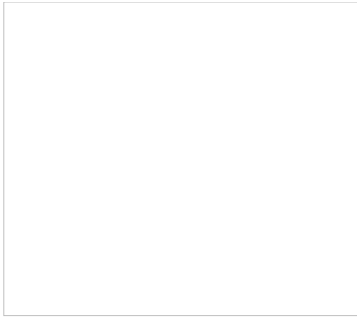
Mapping a form field to a custom Activity History field

When you are all finished, click the **Save** button and you will be prompted to name your form.

Step 2a: Add Pages to Your Form

Activity forms can be as detailed or concise as you need them to be. If the former is true, you can add pages to your form using the **new page** button, located in the [pages palette](#). Adding pages will change the default page name if you have named it. That is, pages name will read "Page 2", "Page 3," and so forth, instead of "New Page".

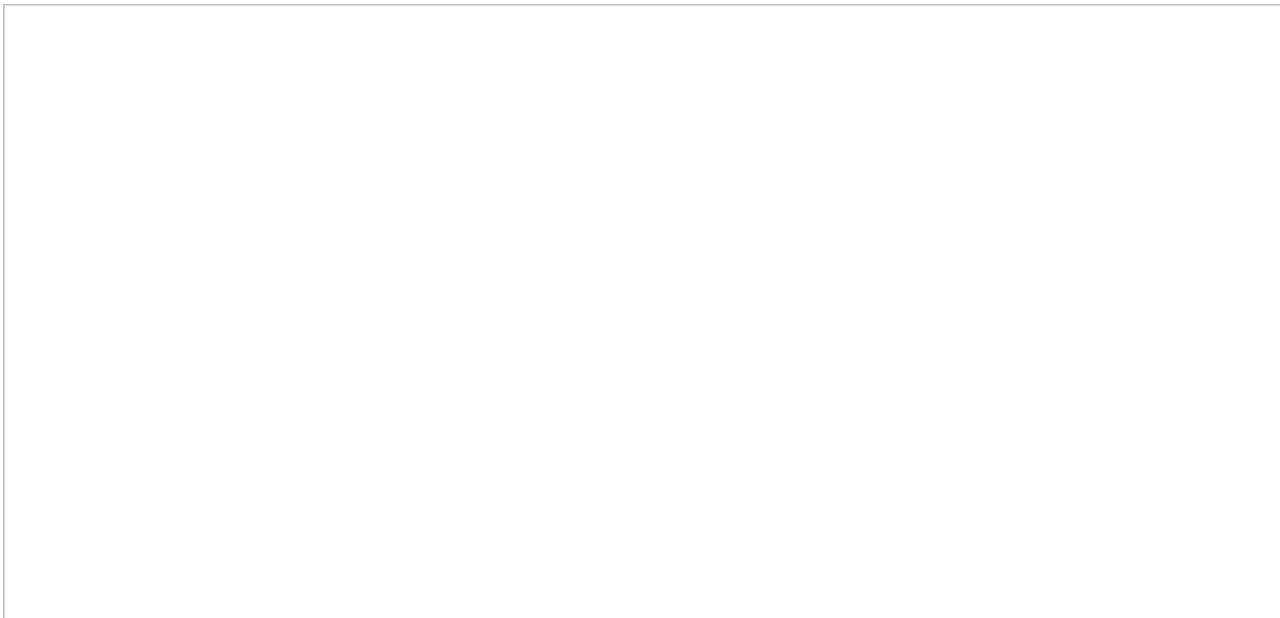
Additionally, you may clone pages using the **clone page** button. Clicking this button creates a new page titled "Clone of <page name>" and all controls are copied from the cloning page.



You may clone or add pages to your form

Step 3: Connect Your Form to a Service

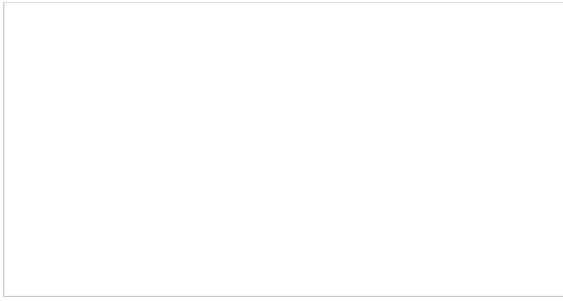
When you are finished building your form, you will need to connect it to a configured service. To do this, return to the Contact Center Administrator application, section [Services & Campaigns > Activity tab](#). From the setting [Enable screenpop activity form](#), you will select the name of the activity form you created.



The Activity tab of the service related to the form must be configured

From the Activity tab, you may configure additional settings, such as whether you want [Knowledge Base](#) articles to be displayed when the form is popped, whether you want the activity form to be displayed before or after webpop, and so forth.

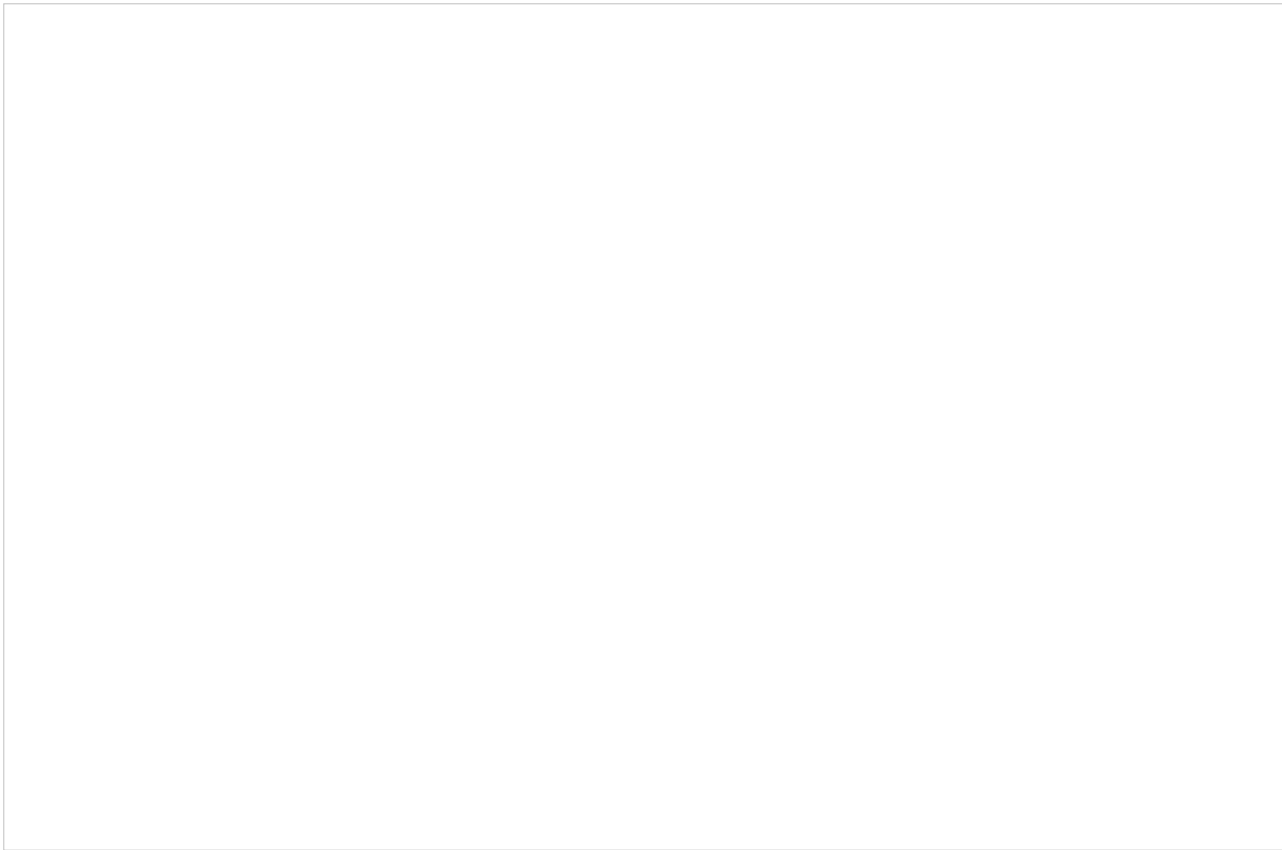
When you are finished connecting the activity form to the service, you can return to section [Forms > Activity > Used in...](#) and see the name of the service(s) associated with the form.



Verify your form is connected to the service by looking in the *Used in ...* tab

Your Form in Action

After you are finished connecting your activity form to your service, you will want to ensure it is working in Agent Desktop. In the following image, you can see how a popped activity form looks to agents.



An activity form when popped in Agent Desktop

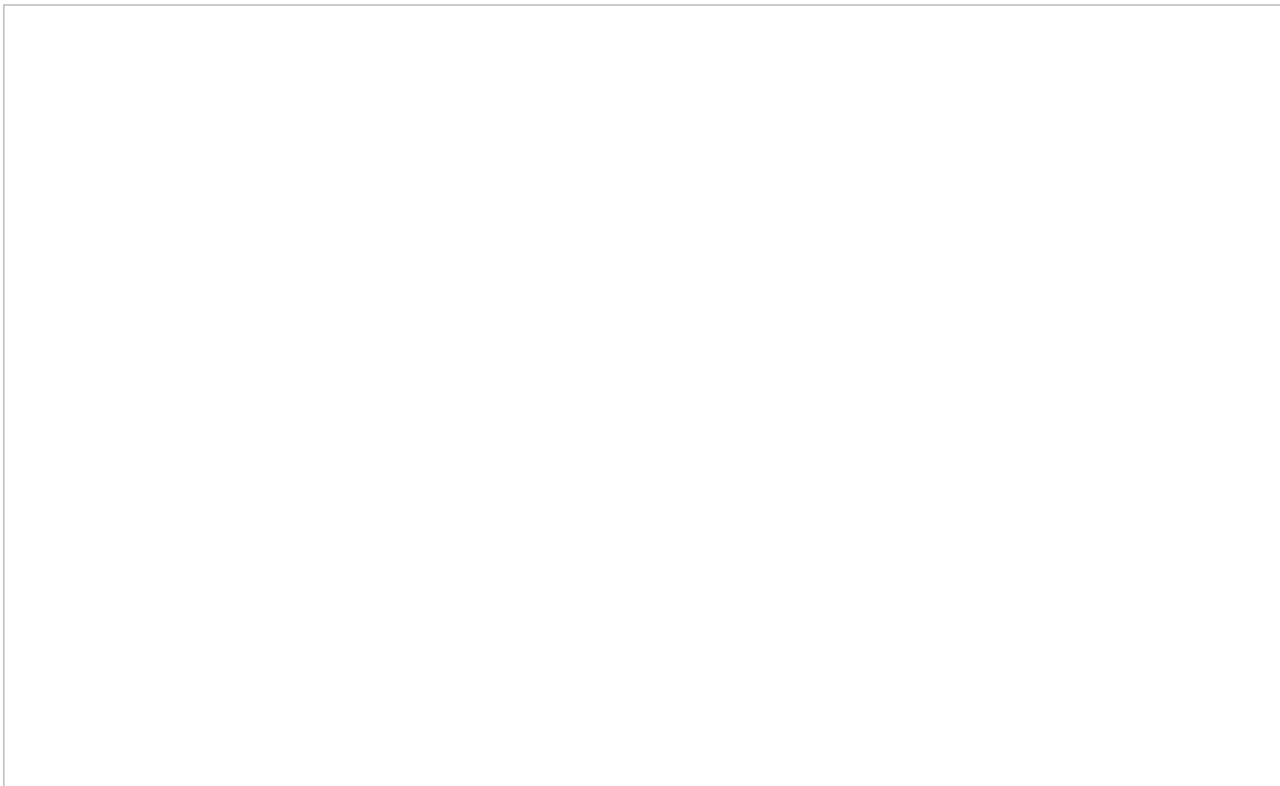
How to Configure Activity History Forms

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

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

2. Map Activity History Values to Form Fields

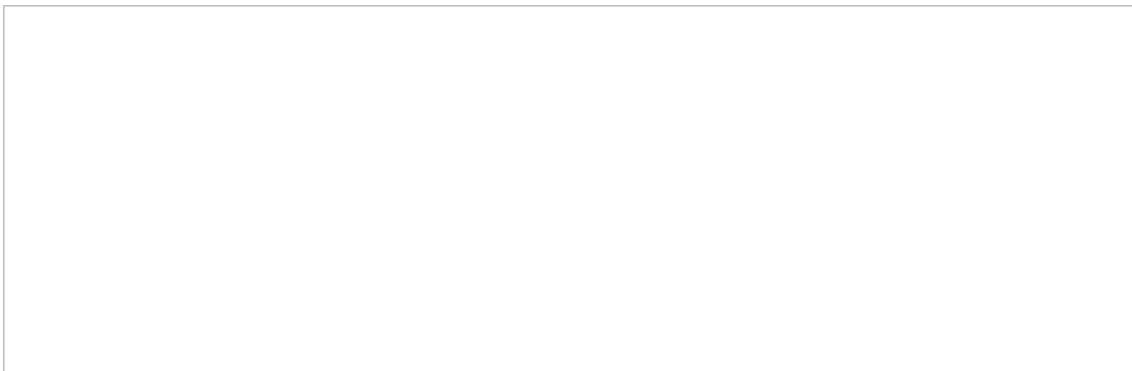
In the Form Builder application, begin adding the types of fields you want your agents to fill out. When editing the field properties, you will need to map Activity History field values to your form fields.

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

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

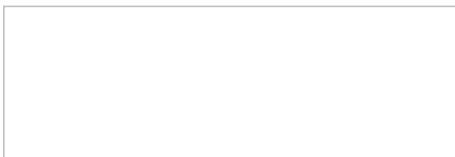
4. Map the same Activity History Values to the New Form Fields

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

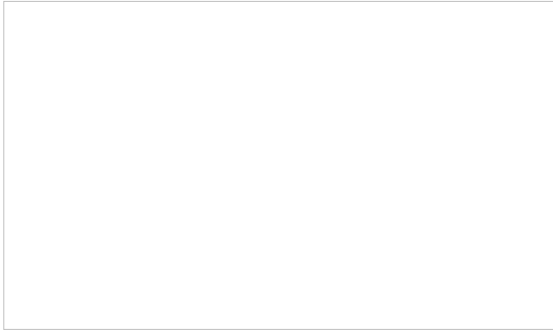
When configuring Activity History forms, it is important to note that they are ultimately displayed in Agent Desktop as **read only**. So, while it is possible to add field types to the form that are normally editable (e.g., [list](#), [phone number](#), [text](#), etc.), they will not function this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



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

5. Assign the Activity History Form to the Desired Service

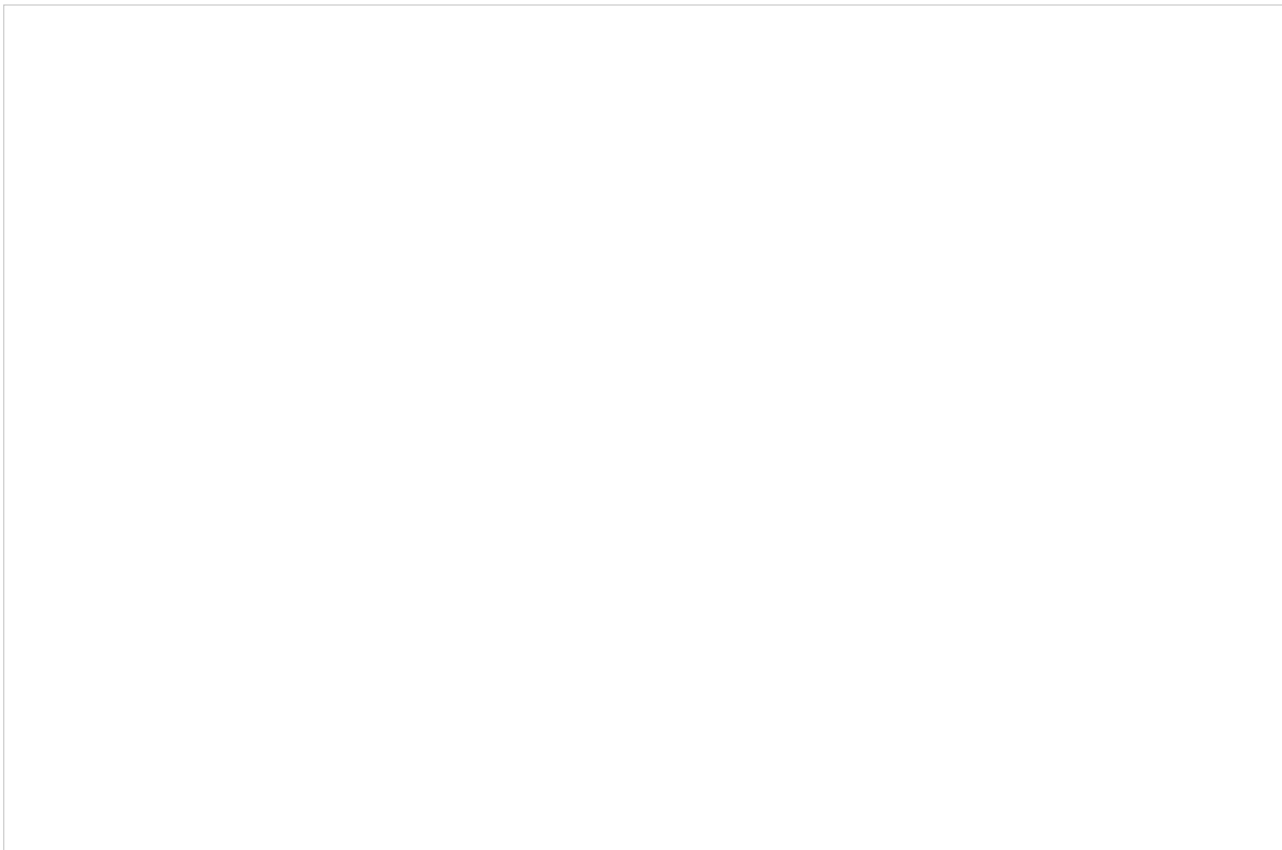
When you are finished designing your activity history form, you will assign it to the desired service in the activity history form *Properties* tab. Click **Apply** to save your settings.



Map the form to the desired service

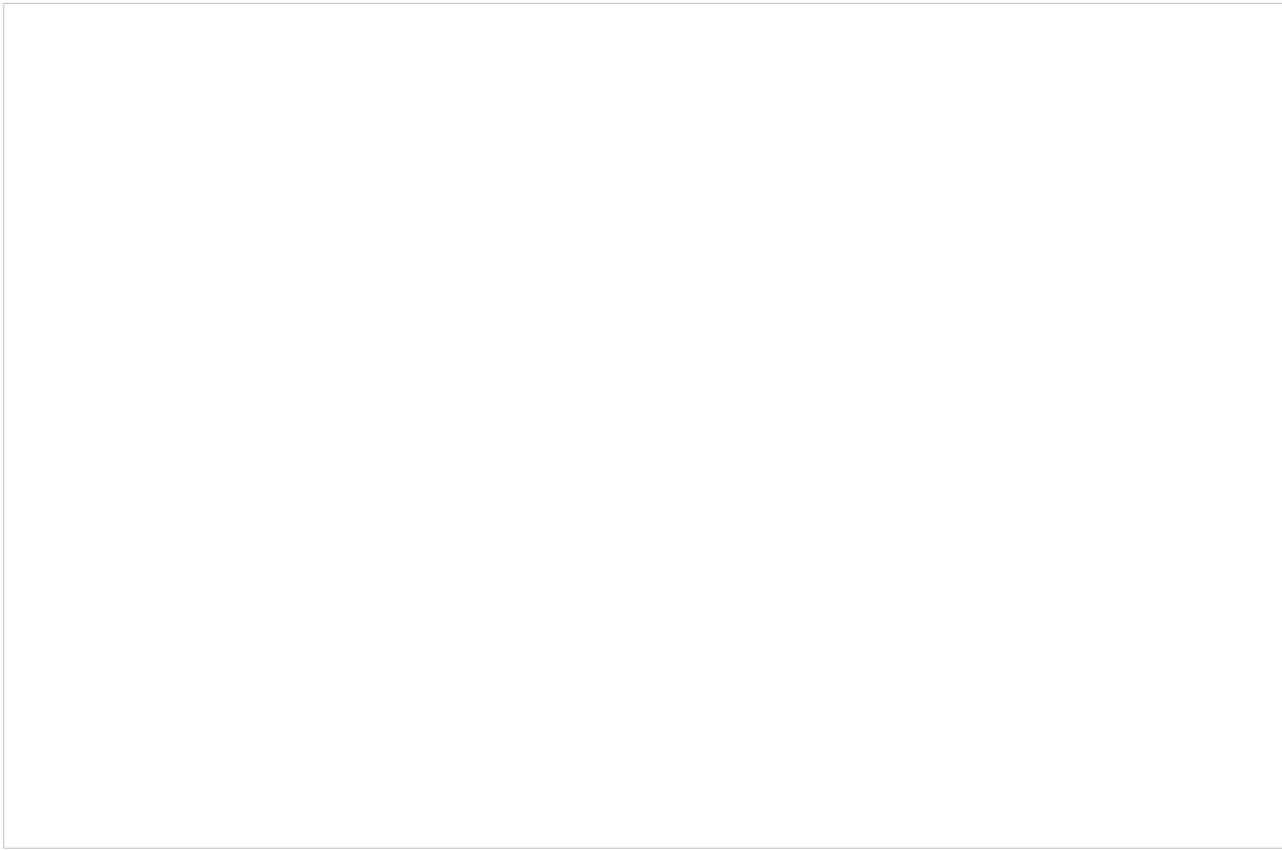
Your Forms In Action

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