

5.8 Survey Forms

Bright Pattern Documentation

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Workflows

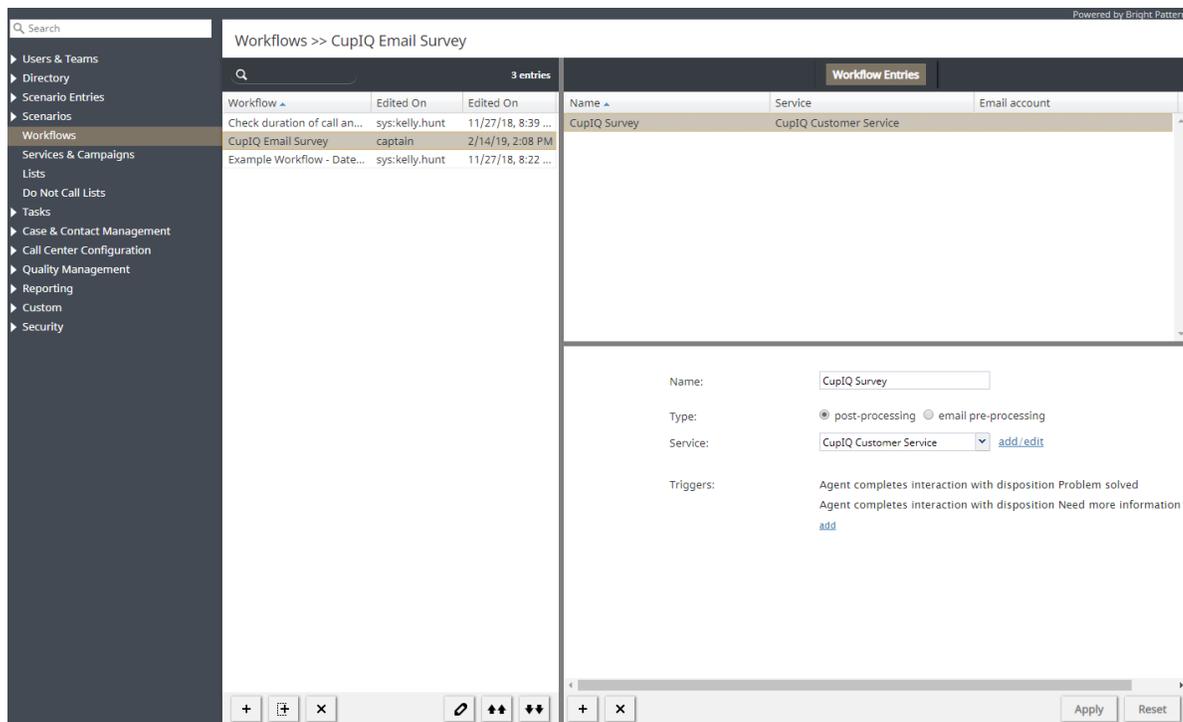
After all interactions are finished, call dispositions and other such actions can start a scenario that automates what happens next. For example, setting a particular disposition for an interaction could trigger the following series of events to happen:

- Send a survey to the customer
- Wait a specified amount of time (e.g., 30 minutes, 1 day, 1 week, etc.)
- Send a follow-up email to the customer.

This series of events is called a *workflow*, and workflows are launched automatically based on the disposition that triggered it.

Workflows are created in the Contact Center Administrator application and are edited in the Workflow Builder application. Workflows will handle any necessary follow-ups, depending on the interaction's disposition type. Such follow-up actions include setting context variables, sending an email, sending a text message, scheduling an event, clearing a scheduled event, and making an external request (or internal API call). Workflows reduce the workload of agents while following up with customers and gathering data in a consistent way.

For more information, see the [Workflow Builder Reference Guide](#). Note that variables may be used when configuring both scenarios and workflows. For more information, see the appendix [Variables](#).



Workflows

Workflow Entries Screen Properties

Workflows are added to services as workflow entries. To add a workflow, navigate to *Configuration > Workflows* and select the + button.

Name

Every workflow entry needs a *name*. This field is mandatory.

Type

Type of workflow. Currently only post-processing workflows are supported. The email pre-processing workflow type is reserved for future use.

Service

Service is the name of the service with which the workflow entry should be associated.

Triggers

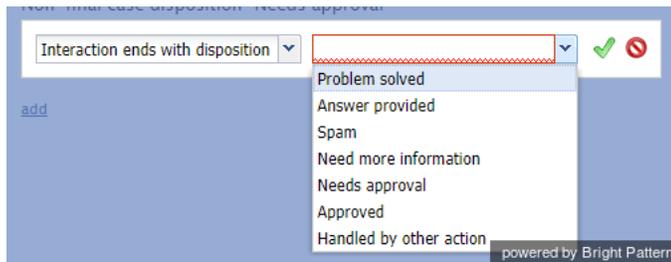
Triggers are the events that cause a configured workflow to be launched. To add triggers, click **add**, select the available triggers and their properties, and select the green check mark to apply your changes.

Trigger types include the following:

- Interaction ends with disposition
- Non-final case disposition
- Average sentiment

Interaction ends with disposition

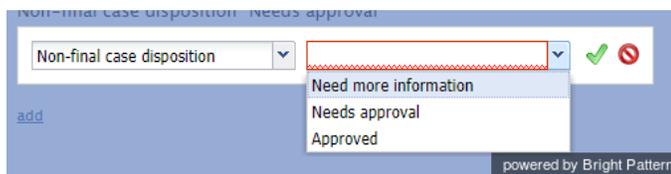
If this trigger is selected, you must select a specific disposition from the drop-down list.



Interaction Ends with Disposition trigger

Non-final case disposition

If this trigger is selected, you must select a specific non-final case disposition from the drop-down list.



Non-Final Case Disposition trigger

Average sentiment

If this trigger is selected, you must show the percentage of the average sentiment. This is done by selecting < or > and moving the percentage slider to the complete the following type of example statement: *A workflow is triggered if the average sentiment is greater than 0.51.*



Average sentiment

How to Solicit Post-Transactional Surveys via Email

Survey forms are designed to be emailed your customers after interactions are completed. Email interactions are not dictated by [scenario](#), so while it is not possible to utilize the interactive survey features associated with chat or voice scenarios, survey forms provide you an opportunity to request satisfaction input.

Survey forms are created and edited in the Survey Form Editor application and can be distributed by post-transaction workflows. Additionally, a single survey form may be configured in any number of required languages. Note that survey forms are associated with the quality management features of Bright Pattern Contact Center software and are different from the forms configured in the [Form Builder](#) application.

Note: Although this article outlines how to solicit surveys based on email interactions, the process may be applied for voice or chat interactions, too.

Prerequisites

This example requires you to have a configured [email service](#) with [dispositions](#), an [email scenario entry](#), as well as a working [SMTP configuration](#).

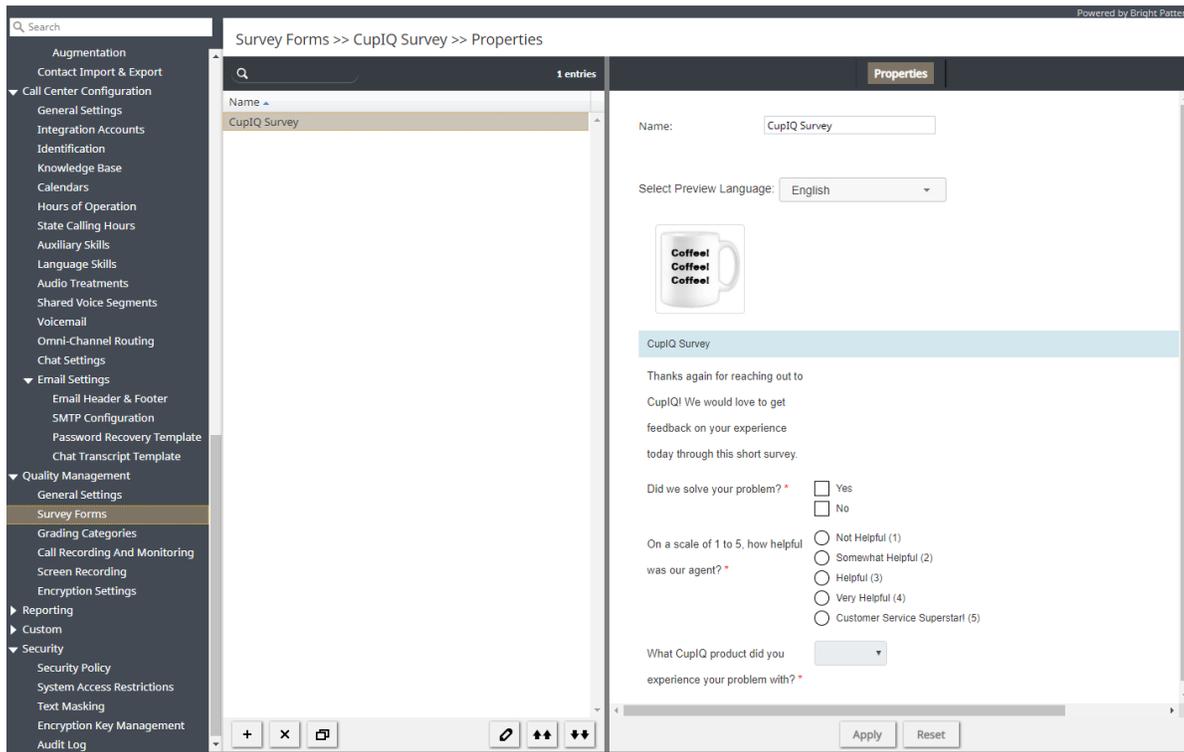
Additionally, if you wish to map custom fields to questions on your form, you will need to configure them first in the Contact Center Administrator application, section [Custom Survey Fields](#).

Procedure

The following sequence of actions illustrates the steps necessary to take in the various Bright Pattern Contact Center applications in order to send post-transactional surveys via email.

Step 1: Define a Form in Contact Center Administrator

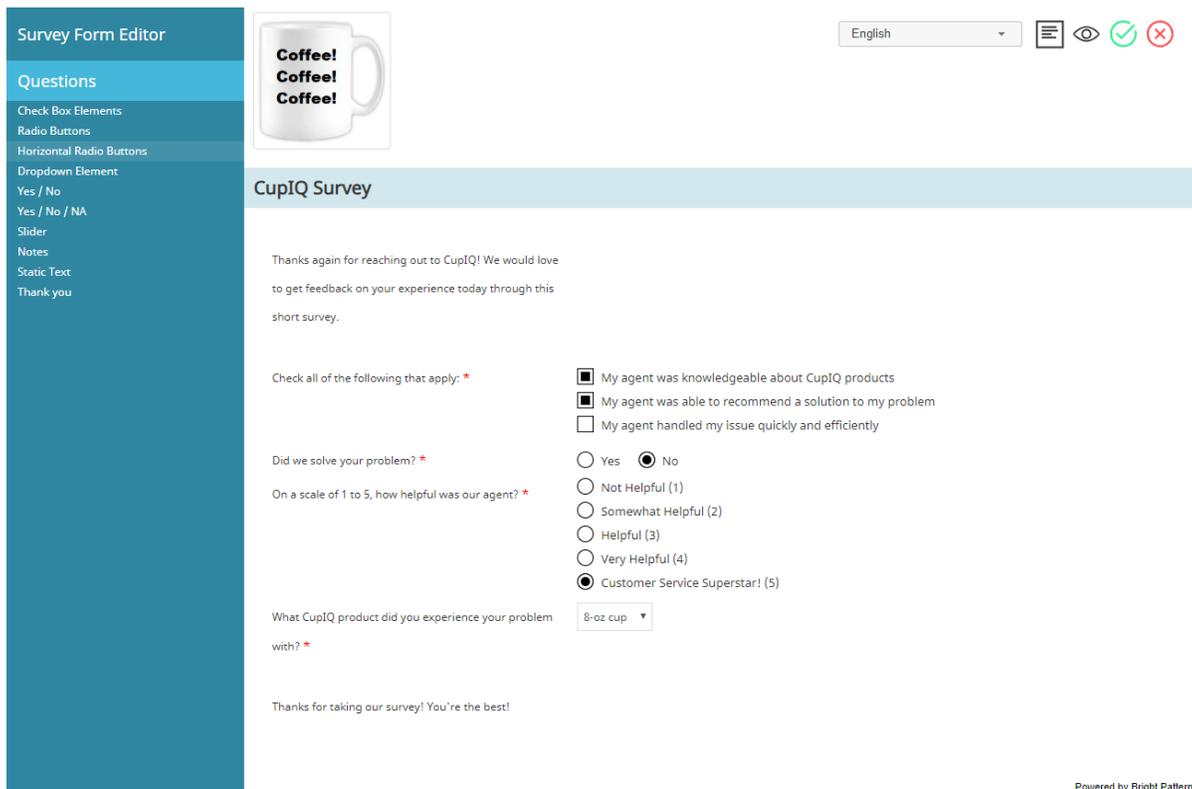
In the Contact Center Administrator application, section [Quality Management > Survey Forms](#), click the **Add new form**  button; this will launch the Survey Form Editor application.



Quality Management > Survey Forms

Step 2: Create Your Form in Survey Form Editor

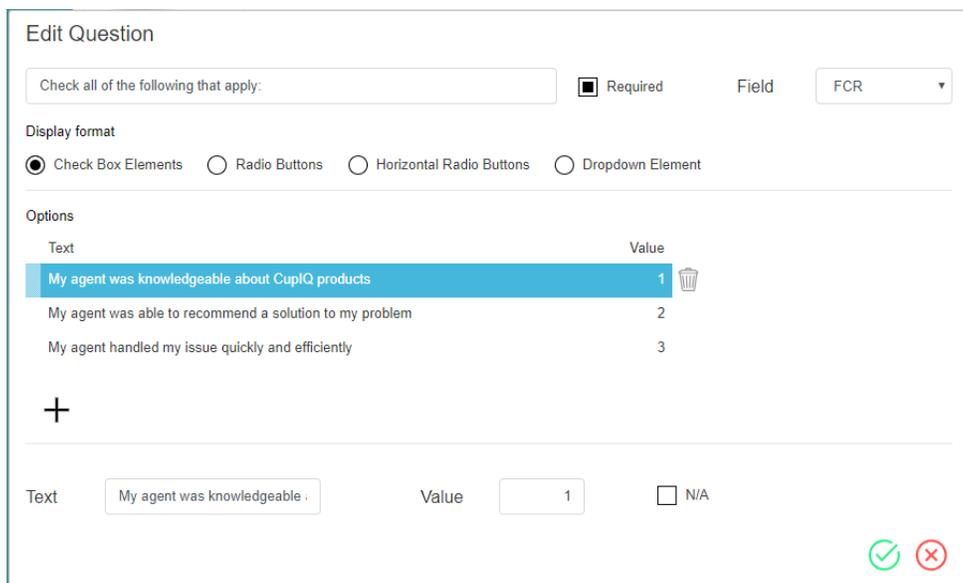
In the Survey Form Editor application, you will configure how your form looks, what questions it will have, and what languages it will be available in; this is accomplished by using the form controls and settings. Note that certain questions can have reporting metrics or fields mapped to them; these values will then appear on reports.



How a completed form looks in the Survey Form Editor

Step 2a: Understanding Basic Form Controls

To define a new question for your form, select the corresponding control from the control palette, drag it to the desired location on the canvas, and specify its settings in the properties editor.



Check Box Elements properties editor

Notice these form controls and elements:

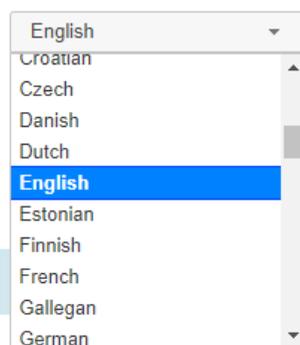
- **edit**  lets you add or edit a question's settings in the properties editor.
- **delete**  lets you remove a question from the form.
- **copy**  lets you create a copy of a question; the copied question will appear below the original.
- **Save**  saves the form.
- **Text** is the field where you add the text of your option/answer.
- **Value** is the field where you may enter a number or unique value that will be associated with this option; values can be passed to reports.
- **N/A** checkbox, when selected, prevents any value being associated with the option.
- **Field** drop-down menu allows you to select reporting metrics/fields to map to a given question. The following field options are available:
 - [CSAT](#)
 - [FCR](#)
 - [NPS](#)
 - Any custom fields created in the Contact Center Administrator application, section [Custom Survey Fields](#)

When you are finished configuring your form, click **Save** . If you are saving a form for the first time, you will be prompted to name your form in a pop-out window.

Step 2b: (Optional) Configure Your Form in Different Languages

When creating your form, the default language is the language of your contact center. To create a new version of your current form in a different language, do the following:

1. After having saved your form in the original language, select a new language from the drop-down language selector.

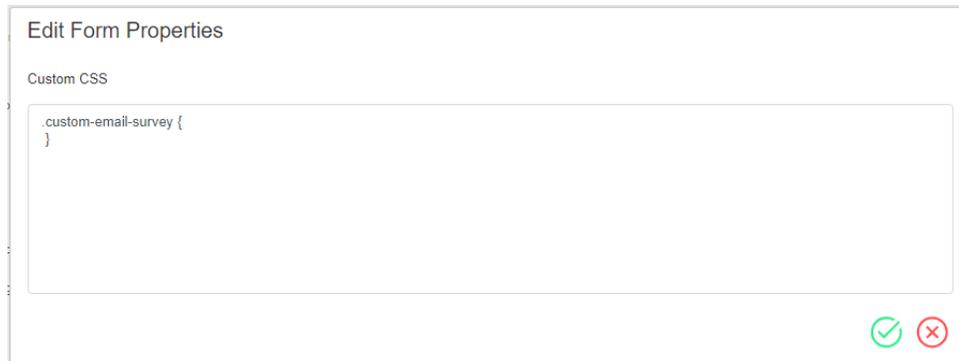


Language selector

2. Begin changing the language of the current questions to the new language; also, you may add new questions.
3. Click the **Save**  icon; your form will be configured in two languages.
4. Repeat this process for as many languages as you require. Note that you may preview forms in the [Properties](#) pane in section *Survey Forms*.

Step 2c: (Optional) Customize the Look of Your Form with Custom CSS

Note that it is possible to edit the look of your form by using custom CSS. To launch the CSS editor, click the **Edit form properties**  icon. To preview your form, select the **Preview**  icon.



Custom CSS editor

Step 3: Configure a Workflow

When your survey form is complete, you will need a way to distribute it via email that happens post-interaction; this can be accomplished with a workflow.

Configuring a workflow to send a survey form requires an [EMail](#) block. It is recommended that you add a [Wait](#) block as well (see Wait Block Settings, below).

EMail Block Settings

When configuring the settings for this block note the following:

- In order for the survey to be sent to the correct customer's email address, enter the [\\$\(item.from\)](#) variable in the [To: Address\(es\)](#) field; this variable pulls in the email address of the customer whose email has been assigned the correct disposition.
- In the **Template language** field, you should enter the ISO language code associated with the selected language (e.g., "en" for English, "ja" for Japanese, etc.).
- When composing the message body, click the **Survey link** button, and select the appropriate form from the drop-down menu; selecting the form inserts the survey URL into the body of your message.

Wait Block Settings

Note that for surveys sent via workflows, the survey arrives faster than email. When soliciting post-transactional surveys via email, we recommend adding a [Wait](#) block to the workflow and specifying a Wait duration of 24 hours, as shown. Doing so will delay the workflow for 24 hours before sending the survey, ensuring that the survey is available for the customer to read when they answer the email.

Wait

Pauses workflow execution for a specified number of seconds, minutes, hours, or days. Decimal fractions are allowed. Maximum value is 15 days.

Wait duration:

Wait block configuration

Step 3b: (Optional) Send a survey form in a different language

If you configured your survey form in a different language (from step 2b of this procedure), follow these steps to configure an EMail block in that specific language and insert the survey form link associated with it. In this example, we will be sending a survey in Japanese.

1. Create a Japanese version of your survey form (from Step 2b above).
2. Configure a workflow with an EMail block (from Step 3 above).
3. In the EMail block settings, make sure that the *Template language* field contains the correct language value (e.g., "ja"), or that it refers to a variable containing the correct language.
4. Create a Japanese version of the email body and insert survey link (from Step 3 above). The link will look like this:

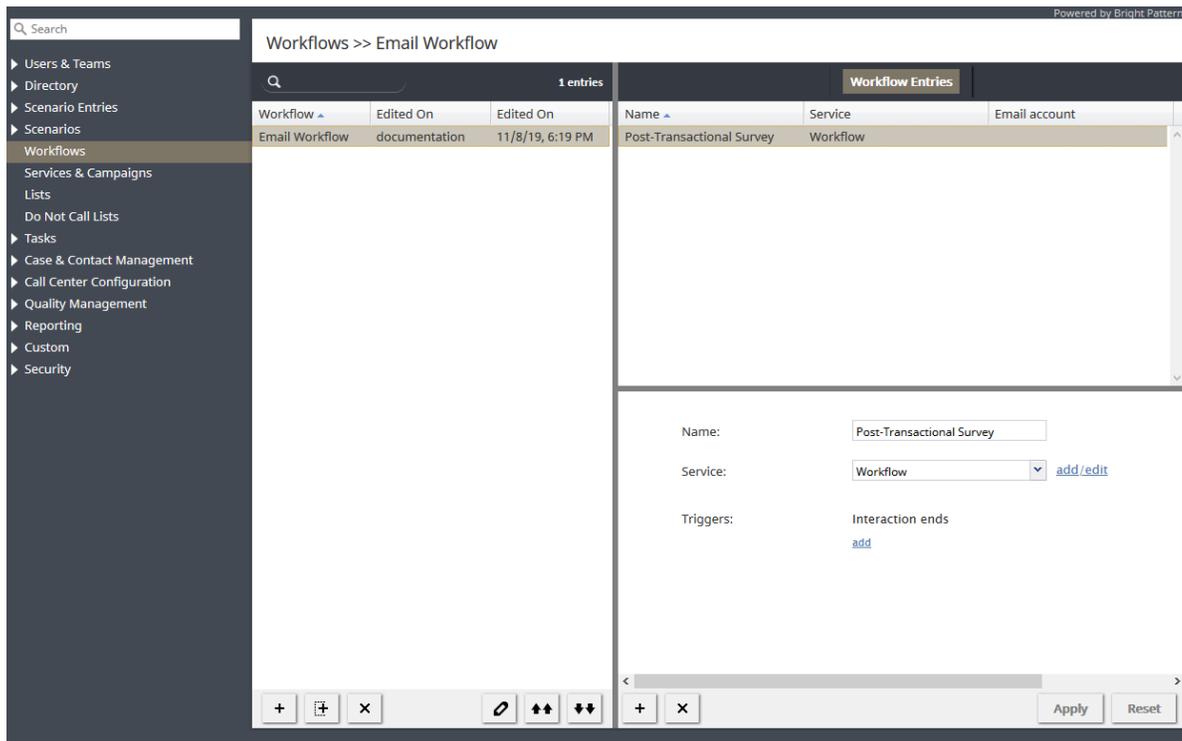
```
https://<tenant>.brightpattern.com/clientweb/survey/${item.globalInteractionId}/${item.interactionId}/<survey_name>?  
lang=ja&tenantId=xxxxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxxxx
```

5. Save the workflow with a new name (e.g., "CupIQ Survey - Japanese") so you can differentiate this survey from others in different languages.

Step 4: Add a Workflow Entry to your Workflow

When you are finished configuring your workflow, you will need to create a workflow entry; this associates the workflow with your configured service. To send the email post-transaction, do the following:

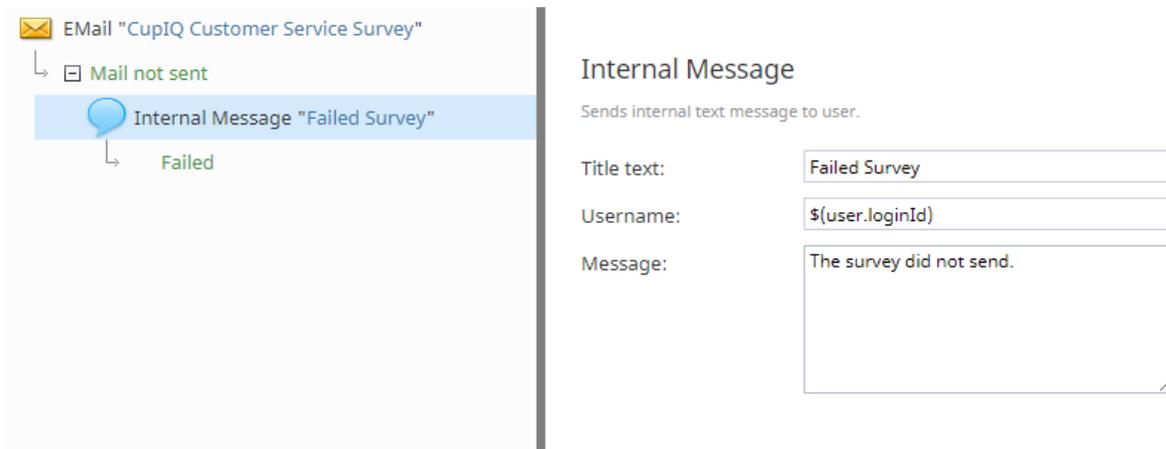
- Select the service from the drop-down menu
- Configure what [triggers](#) (i.e., dispositions) will launch the workflow.



A workflow entry

Troubleshooting

If your workflow is giving you trouble, you can configure the EMail block's [Mail not sent](#) conditional exit with the [Internal Message](#) block; this sends a message to a specific Agent Desktop user if the email was not sent.



Use the Internal Message block to see if your email was not sent

