



5.8 How to Configure Activity Forms

Bright Pattern Documentation

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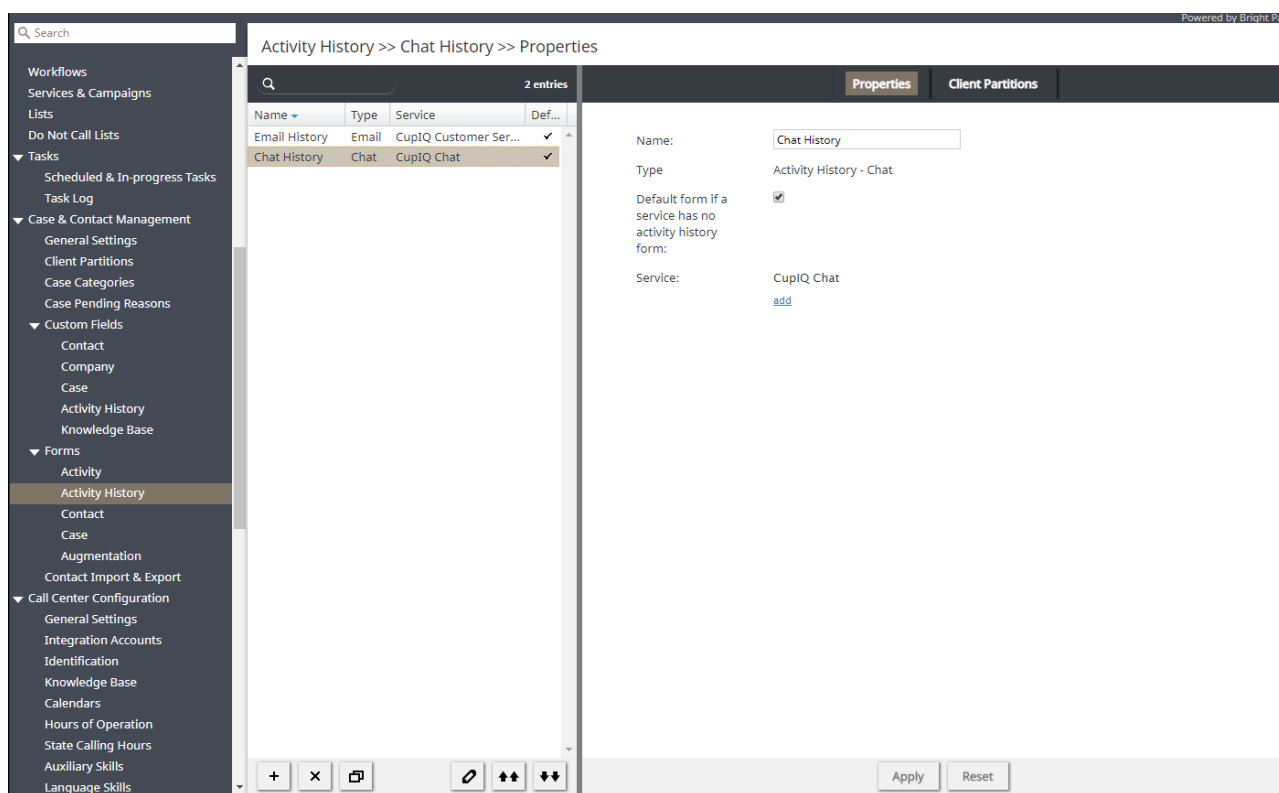
How to Configure Activity History Forms

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

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.

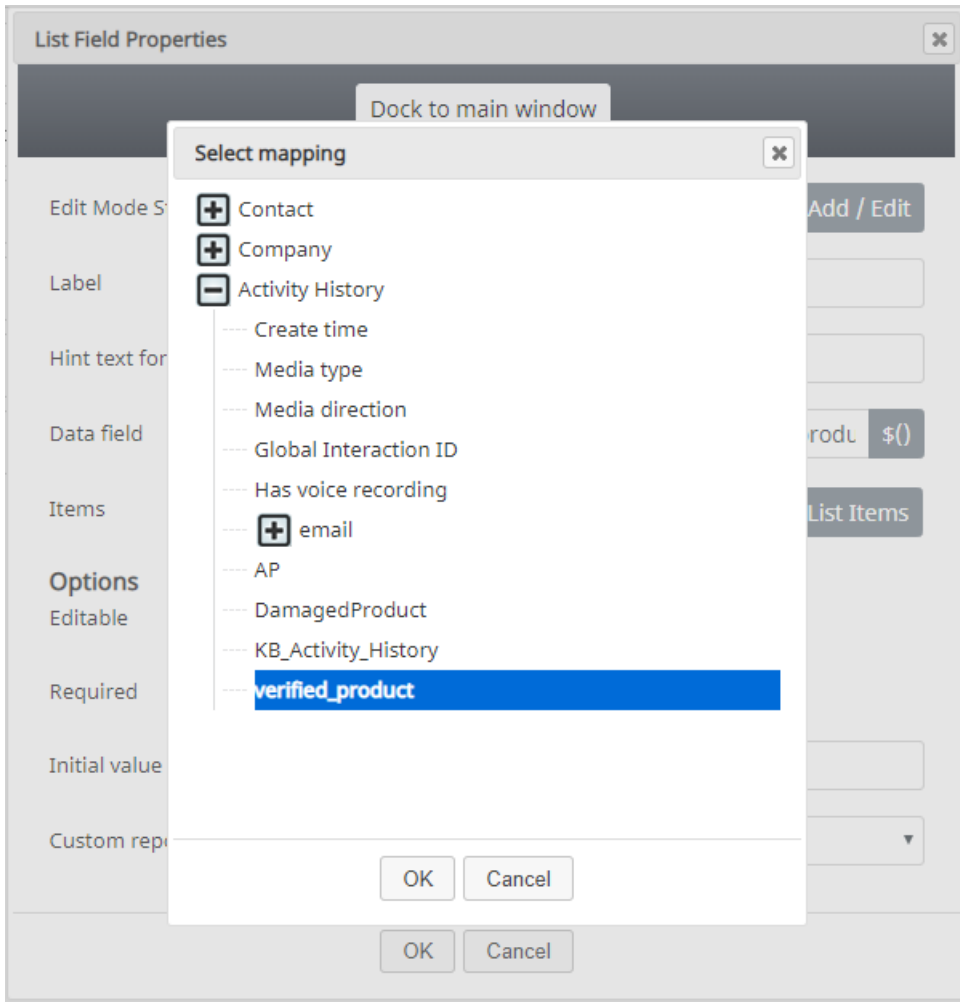
The screenshot displays the 'CupIQ Activity Form' configuration interface. On the left is a sidebar with a search bar and a list of field types: Section, All Email Address, All Phone Number, All Postal Address, Button, Checkbox, Date/Time, Email Address, Hyperlink, Label, List, Notes, Number, Phone Number, Picture, Search Panel, Spacer, Text, US State, and Voice Signature. The main workspace shows a form titled 'CupIQ Customer Service Form' with the following fields: a search bar, a 'Customer Service Form' field, a 'Which CupIQ product is damaged?' field, a 'Verified Product' field, a 'Product SKU' field, a 'From (Email)' field, and a 'Global Interaction ID' field. At the top right of the workspace are 'Preview', 'Save', and 'Close' buttons. A small footer at the bottom right reads 'Powered by Bright Pattern'.

Configuring an activity form

2. Map Activity History Values to Form Fields

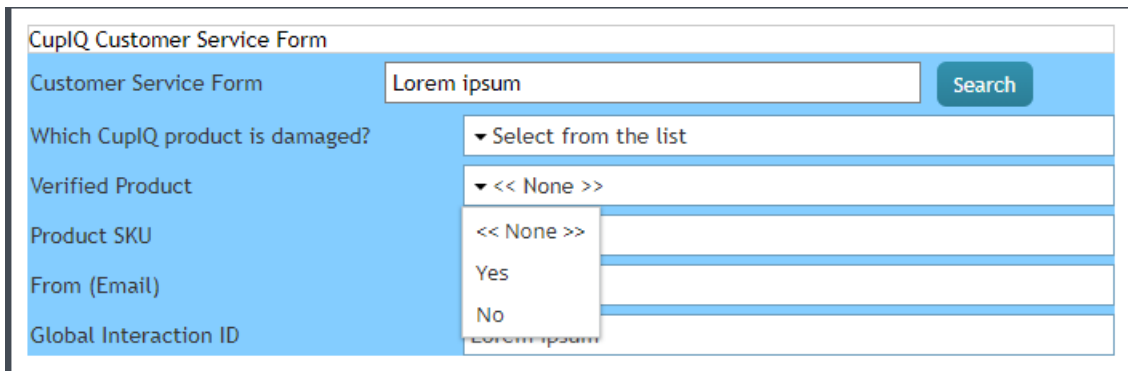
In the Form Builder application, begin adding the types of fields you want your agents to fill out. When editing the field properties, you will need to map Activity History field values to your form fields.

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 screenshot displays the 'CupIQ Chat History Form' builder interface. On the left is a sidebar with a search icon and a list of form controls: Section, All Email Addresses, All Phone Numbers, All Postal Address..., Button, Checkbox, Date/Time, Email Address, Hyperlink, Label, List, Media Player, Notes, Number, Phone Number, Picture, Spacer, Text, and US State. The main workspace is titled 'CupIQ Chat History Form' and includes 'Preview', 'Save', and 'Close' buttons. The form structure shows a 'Section' containing two text input fields: 'Global Interaction ID' and 'Verified Product'. A dashed box labeled 'Drop controls here' is positioned to the right of these fields. At the bottom right, there is a small text attribution: 'Powered by Bright Pattern'.

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.

Text Field Properties
✕

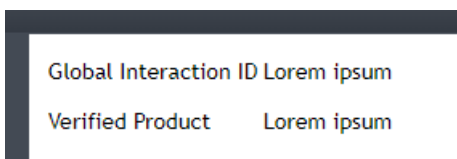
Dock to main window

View Mode Style	<div style="border: 1px solid #ccc; padding: 2px;">None</div> ▼ Add / Edit
Edit Mode Style	<div style="border: 1px solid #ccc; padding: 2px;">None</div> ▼ Add / Edit
Label	<div style="border: 1px solid #ccc; padding: 2px;">Verified Product</div>
Hint text for empty field	<div style="border: 1px solid #ccc; padding: 2px; height: 20px;"></div>
Data field	<div style="border: 1px solid #ccc; padding: 2px; background-color: #ffffcc;"> \$(ActivityHistory.custom_verified_produ \$() </div> <div style="border: 1px solid #ccc; padding: 2px; background-color: #e0e0e0; margin-top: 2px;"> \$(ActivityHistory.custom_verified_product) </div>
Options	
Editable	<input type="checkbox"/>
Required	<input type="checkbox"/>
Hide if read-only and empty	<input type="checkbox"/>
Multiline	<input type="checkbox"/>
Destination for KB article content	<input type="checkbox"/>
Initial number of lines	<div style="border: 1px solid #ccc; padding: 2px; width: 100px; text-align: center;">1</div>

OK
Cancel

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.

Name:

Type: Activity History - Voice

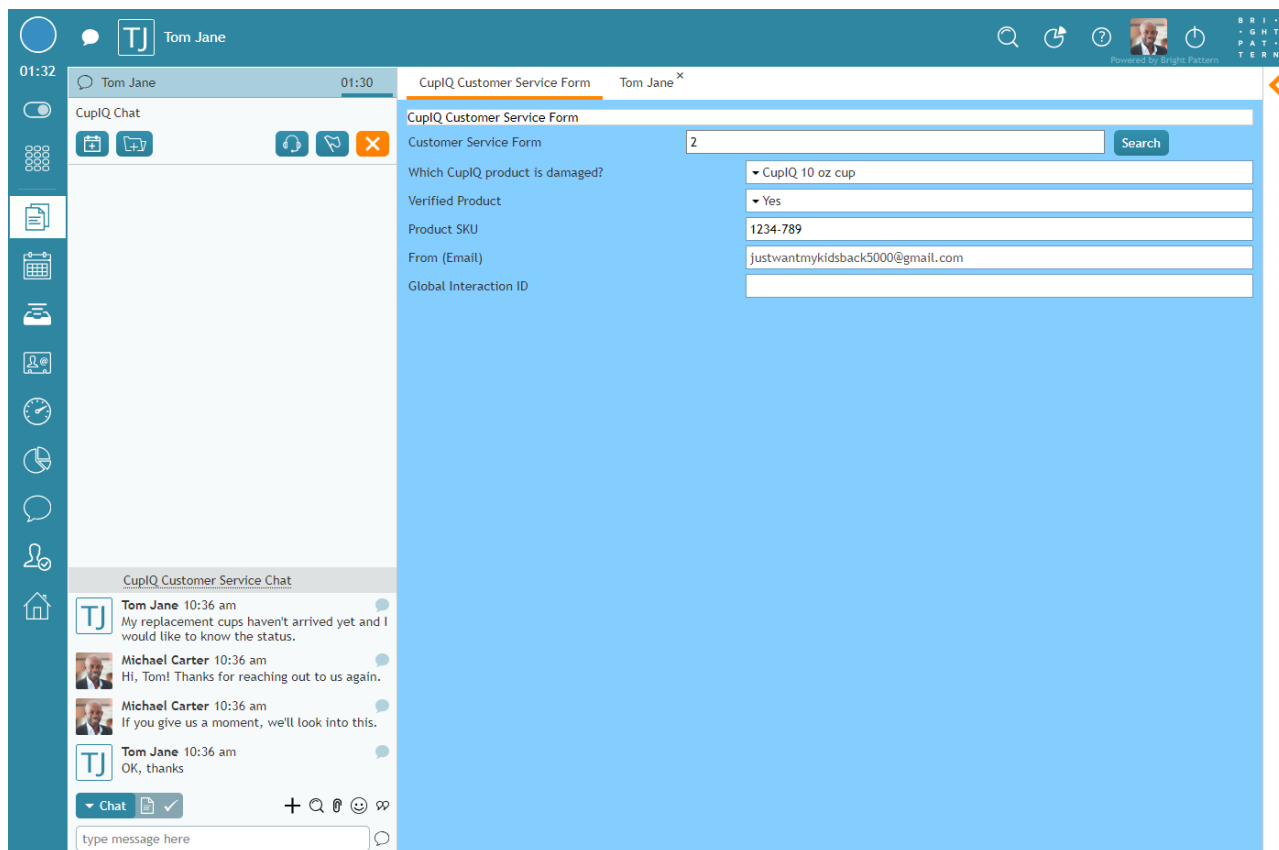
Default form if a service has no activity history form:

Service: Customer Service [add](#)

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.

Select Service

Enter number

Directory Favorites Recent Dial Pad

Tom Jane 10:36 AM

Tom Jane Jan 25 1:10 PM

Tom Jane Jan 25 12:56 PM

#1068 Unidentified Jan 25 9:34 AM

#1066 Unidentified Jan 24 3:41 PM

#1060 Tom Jane Jan 24 3:39 PM

#1066 Unidentified Jan 24 3:36 PM

#1066 Unidentified Jan 24 2:45 PM

#1064 Google Jan 24 2:43 PM

#1060 Tom Jane Jan 9 1:16 PM

#1060 Tom Jane Jan 9 1:14 PM

#1059 Sunny Side Hotel and S... Dec 20 10:25 AM

#1058 Tom Jane Dec 12 4:15 PM

Tom Jane +1 650-555-5555 Dec 12 4:15 PM

Fatima Ali 1004 Dec 12 4:14 PM

#1057 Unidentified Dec 10 9:40 PM

#1057 Unidentified Dec 6 2:54 PM

justwantmykidsback5000@gmai... Oct 29 3:26 PM

justwantmykidsback5000@gmai... Oct 29 3:24 PM

justwantmykidsback5000@gmai... Oct 29 3:10 PM

justwantmykidsback5000@gmai... Oct 29 3:08 PM

justwantmykidsback5000@gmai... Oct 29 3:05 PM

Oct 29 2:77 PM

Search Tom Jane x

Tom Jane

justwantmykidsback5000@gmail.com

+1 650-555-5555

Edit

Details Activities Pending Cases

Time	Agent	Disposition	Subject
10:36 AM	Michael Carter	Question answered	05:09
Jan 25	Michael Carter	Replacement sent	05:41
Jan 9	Michael Carter		RE: Re...
Oct 23, 2018	Michael Carter	Product sold	09:10

Tom Jane chatted on Jan 28, 2019, handled by Michael Carter

CupIQ Customer Service Chat

Tom Jane 10:36 am
My replacement cups haven't arrived yet and I would like to know the status.

Michael Carter 10:36 am
Hi, Tom! Thanks for reaching out to us again.

Michael Carter 10:36 am
If you give us a moment, we'll look into this.

Tom Jane 10:36 am
OK, thanks

Michael Carter 10:39 am
Hi, Tom. Thanks for waiting. Your cups were shipped to you on Friday afternoon and should arrive in three to five business days. The tracking number is XP12348-GH14723.

Tom Jane 10:39 am
Perfect. Thanks for your help!

Michael Carter 10:40 am
You're welcome and thanks for contacting CupIQ!

Michael Carter

Global Interaction ID 43AD11B6-98F4-450C
Verified Product Yes

CupIQ Chat: Question answered

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](#)