5.3 Form Builder Reference Guide

Bright Pattern Documentation

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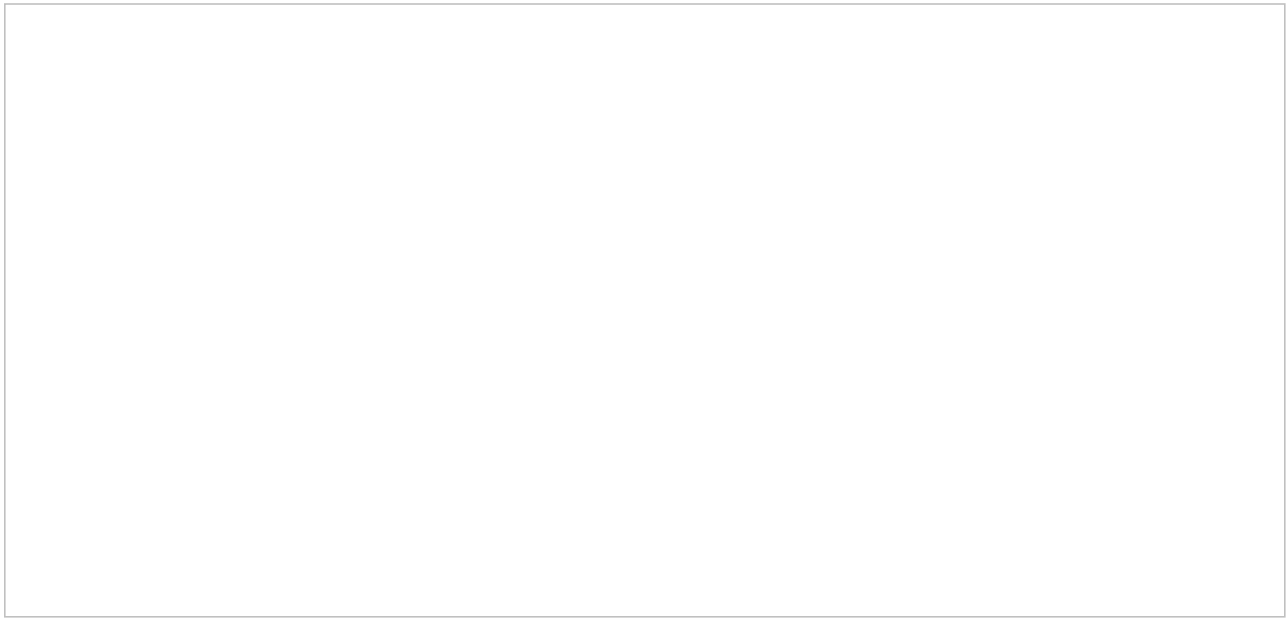
Purpose

The Bright Pattern Contact Center *Form Builder Reference Guide* describes the building blocks of the Bright Pattern Contact Center web forms. This guide explains how to use these building forms to build custom forms for the Agent Desktop application.

Forms are configured in the Contact Center Administrator application, while the form fields are added and edited in the Form Builder application. For more information about form management, such as association of forms with outbound campaigns, see the *Contact Center Administrator Guide*, section Forms.



Drag and drop fields to build custom forms with the Form Builder application

Audience

This guide is intended for professionals responsible for design, development and testing of agent desktop applications in your contact center.

Participants are expected to be familiar with general principles of web design and to have a solid understanding of contact center operations and resources that are involved in such operations, including agents and teams, services and skills, schedules, and access points.

How to Launch Form Builder

The Form Builder application is always launched from the Contact Center Administrator application. Only after a form is added to the system in Contact Center Administrator is it ready to be edited and customized.

Forms may be either added or imported to your contact center.

How to Add a Form

To add a new form, follow these steps:

1. In the Contact Center Administrator application, navigate to *Configuration* > *Forms*.

Contact Center Administrator > Configuration > Forms

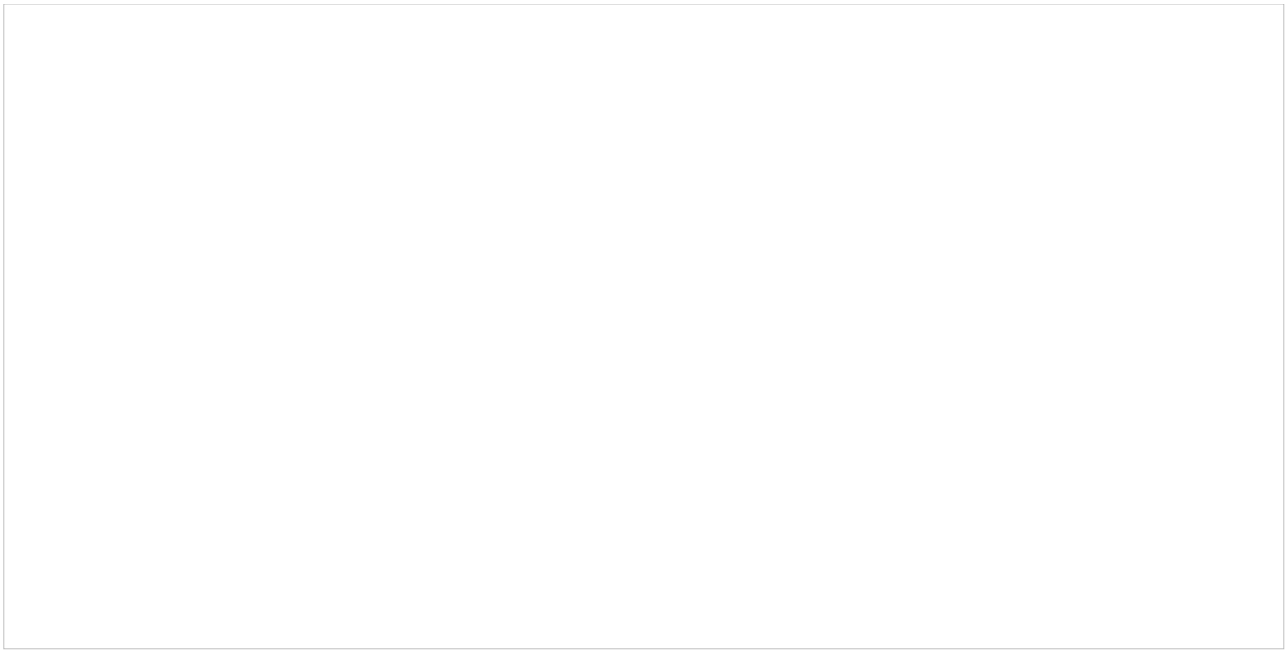
2. Select the type of form you wish to create (e.g., Activity, Contact, Case, Augmentation).

Forms > Activity

3. At the bottom of the screen, click **+** to add a new form.

Click "+" to add a new form

4. The Form Builder application will open in a new browser window or tab, where you will build and edit the new form.



A new, blank form

How to Import a Form

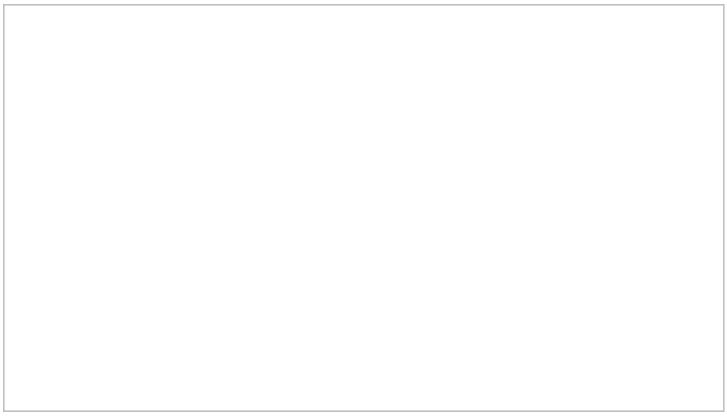
You can import any form that was built in any version of Bright Pattern Contact Center. When working with forms created in version 3.x of the software, you will need to import them before editing them in Form Builder.

To import a form, follow these steps:

1. First log into the Contact Center Administrator application and navigate to *Case & Contact Management* > *Forms*.

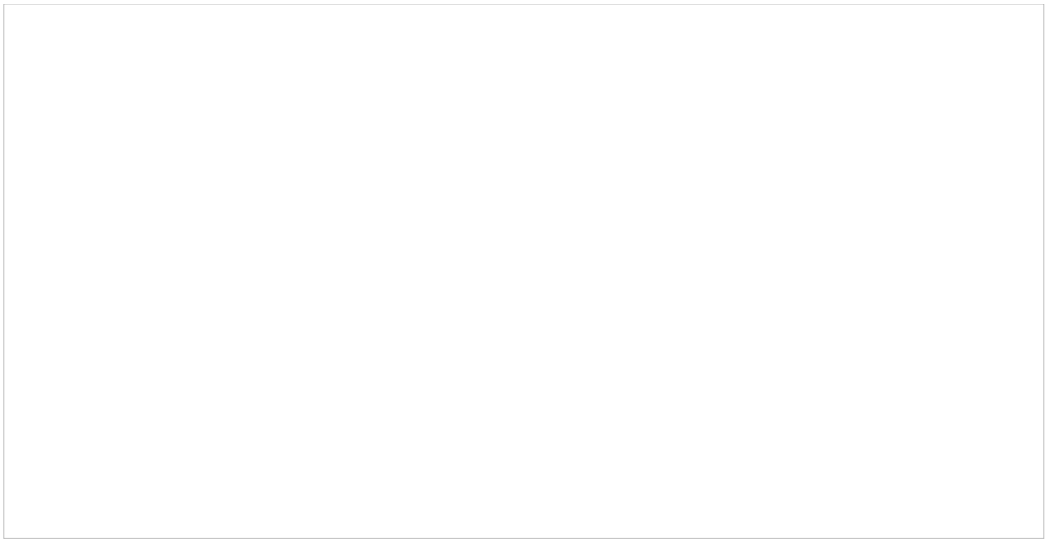
Contact Center Administrator > Case & Contact Management > Forms

2. Click the **Import form** button.
3. In the *Import Screenpop Form* dialog, name and browse for your form, and then click **Upload**.



Upload form

4. Your imported form will appear in the list of forms.



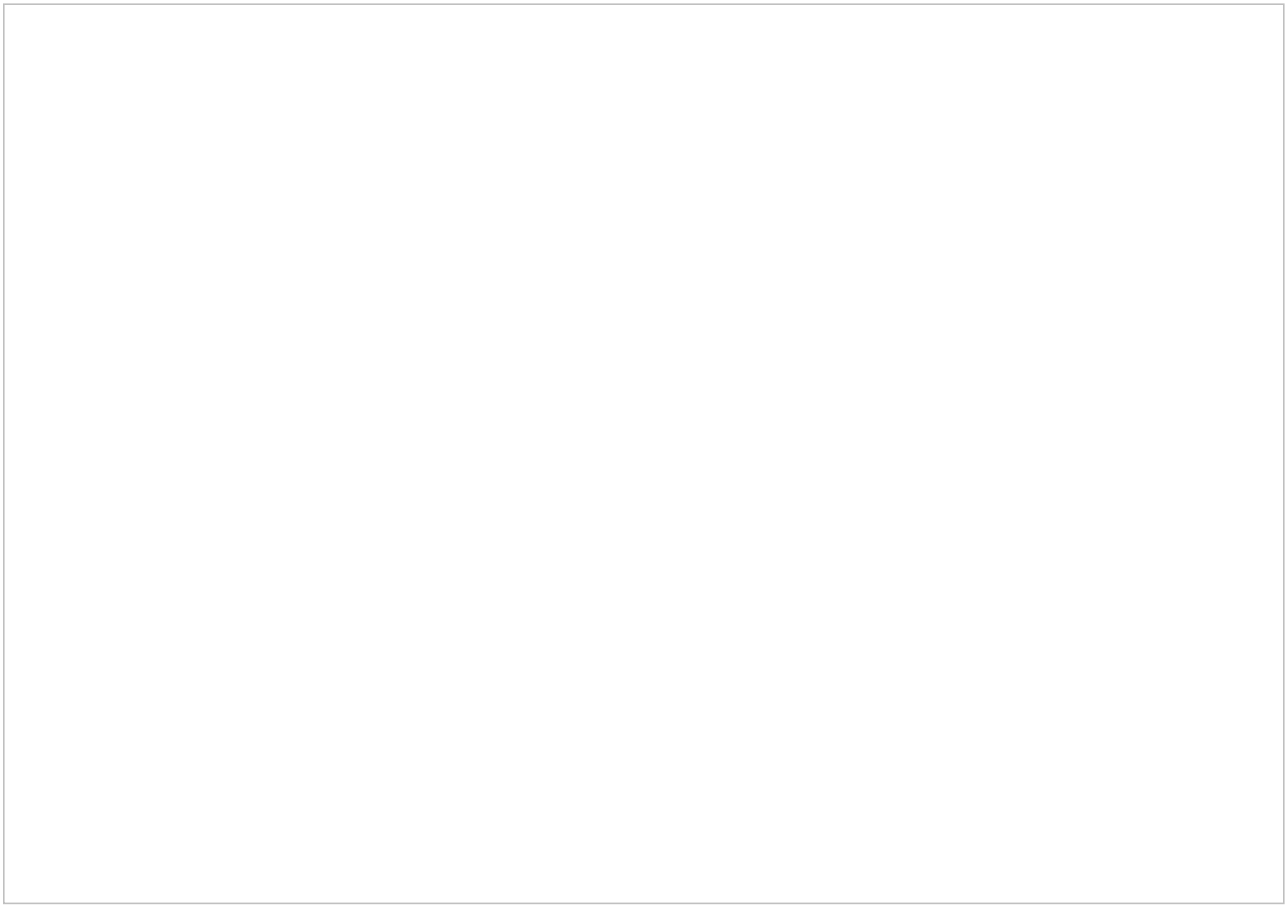
All forms

How to Launch Form Builder and Edit a Form

Once your forms have been added or imported to your contact center, they are ready to be edited in Form Builder.

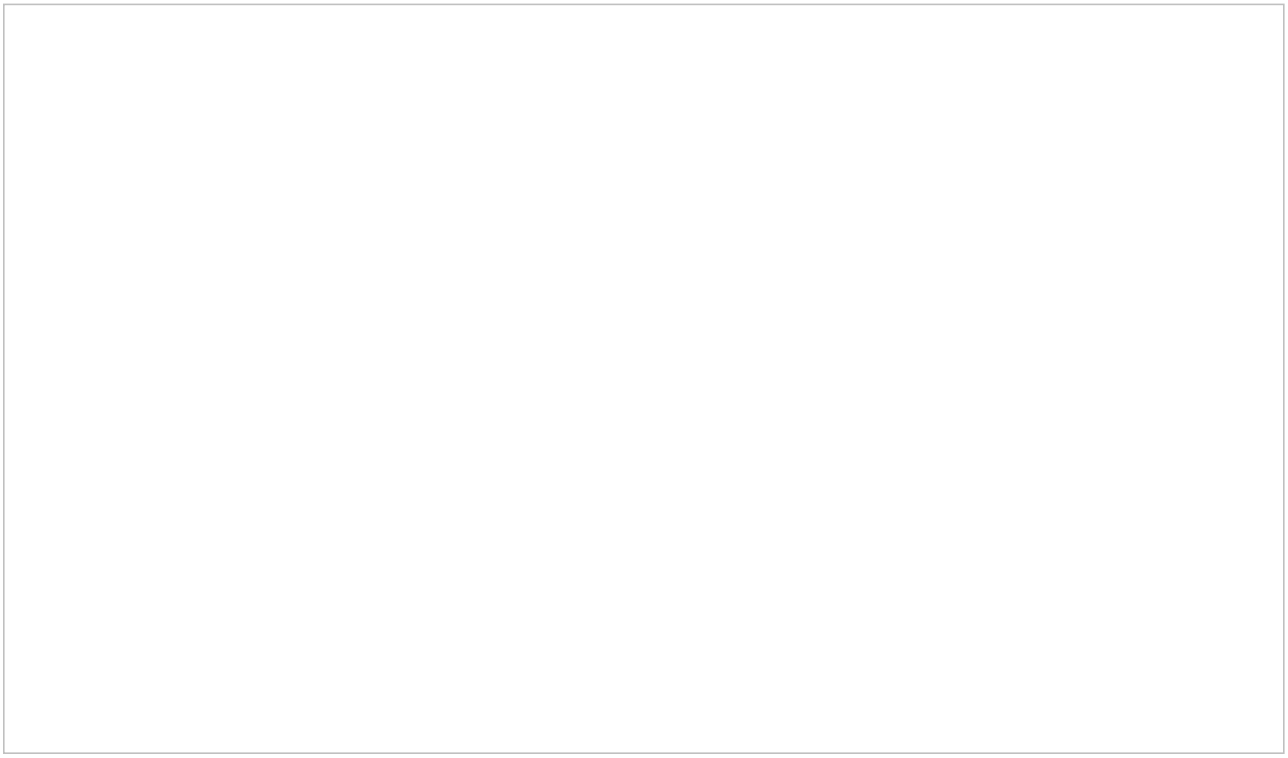
Follow these steps to open a form in Form Builder:

1. In the Contact Center Administrator application, navigate to *Case & Contact Management* > *Forms*.



Contact Center Administrator > Case & Contact Management > Forms

2. Select the form that you want to edit from the list.
3. Click the **Edit** button.
4. This will open the form in the Form Builder application, in a new browser window or tab.



Editing a version 3.x form

Form Builder Overview

Bright Pattern Contact Center supports the creation of service-specific web forms that can be used to facilitate interaction handling. If a form is defined for a particular service, it will be displayed by the Agent Desktop application when a corresponding interaction is distributed to the agent. Activity forms can be pre-filled with data from third-party databases (via scenarios) and from calling lists.

Forms associated with outbound campaigns also can be used for new data entry during active interaction handling and/or after-call work (ACW). Filled-out forms can be transferred between agents working on the same interactions. The data collected via editable forms can be stored as part of the campaign results and is available for offline processing.

Note that editable forms are currently supported for services of Outbound Voice and Blended Voice types only. For all other types of services, static forms can be used (i.e., forms without any editable fields).

Forms are designed and edited in the application called Form Builder. This application is launched from the Contact Center Administrator application. For more information, see section Activity Forms of the Bright Pattern *Contact Center Administrator Guide*.

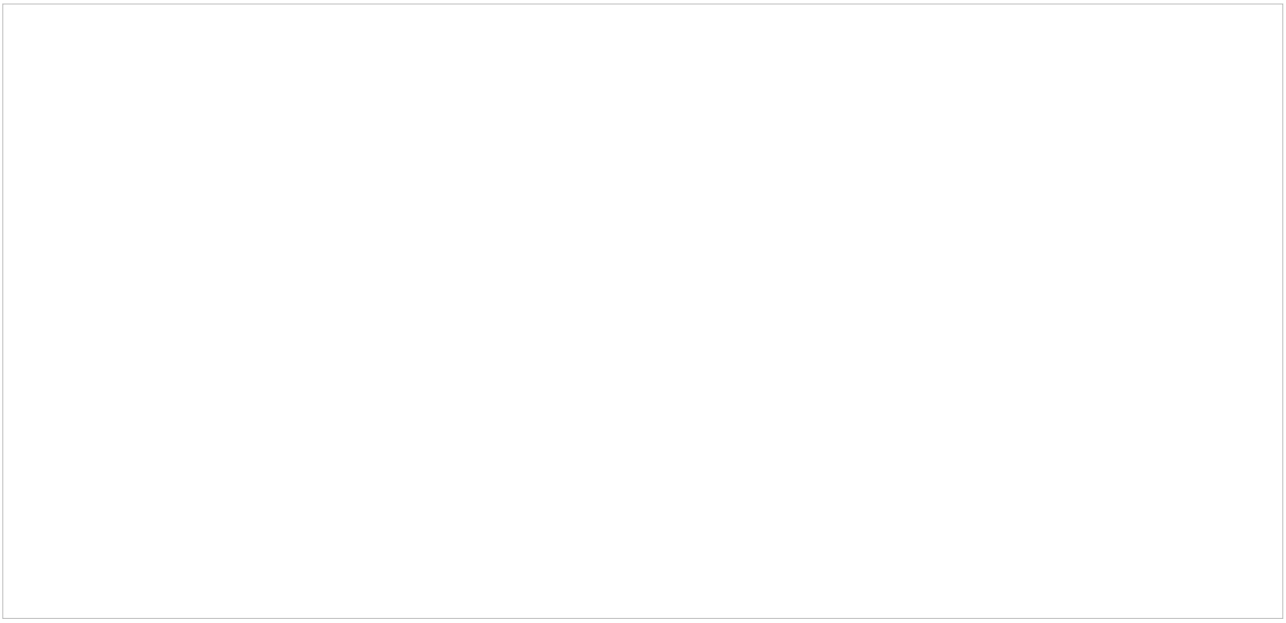
User Interface

The Form Builder application provides a graphical user interface (GUI) that allows you to place various user interface (UI) elements to desired locations on a page and edit their properties, thus building your form. A form can incorporate various types of UI elements, such as static text, data fields, and pictures.

When creating or editing forms, Form Builder is shown in two different views: Dynamic Layout Editor and Static Layout Editor. The *Form Builder Reference Guide* describes both the Dynamic Layout Editor and Static Layout Editor views, as well as the forms and types of controls available for each.

Dynamic Layout Editor

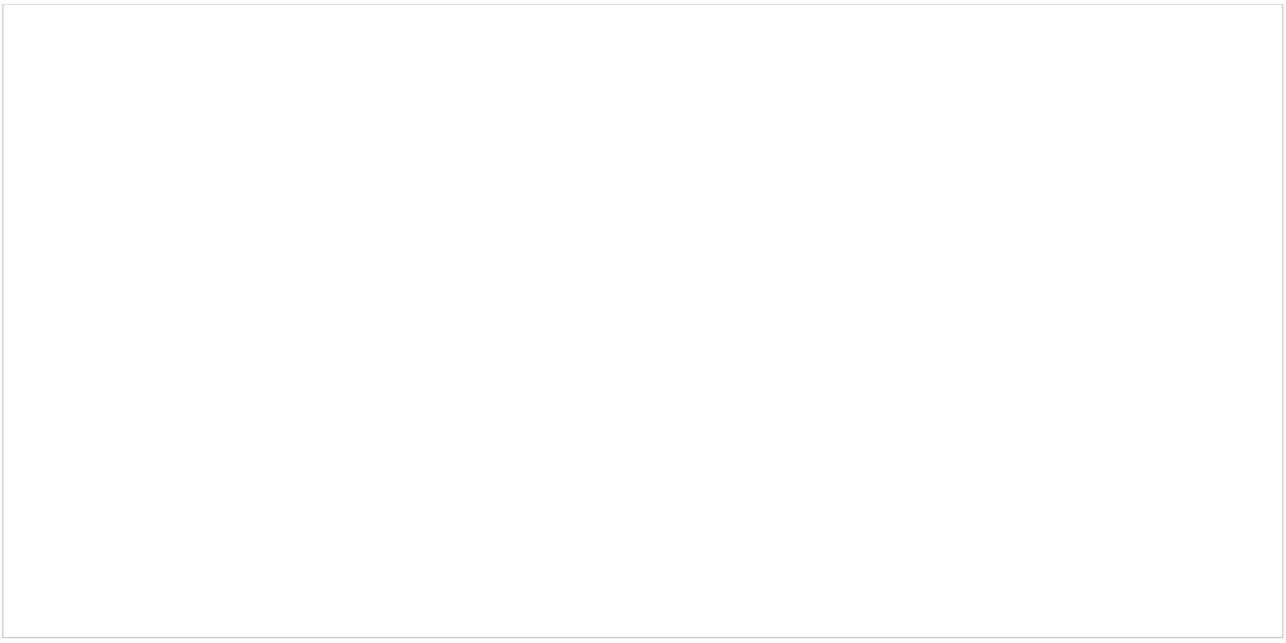
Bright Pattern Contact Center version 5.x brings a new GUI view called Dynamic Layout Editor to the Form Builder application. The Dynamic Layout Editor view enables the creation of new forms with flexible, dynamic layouts. In this view, columns, rows, and fields are easily resized and positioned on the form. Dynamic Layout Editor brings additional form controls, field properties, preview modes, and page thumbnails for multi-page forms. Note that Form Builder's Dynamic Layout Editor view is used to create new forms only.



Creating a new form

Static Layout Editor

Imported forms that were created in Bright Pattern Contact Center version 3.x can be edited in Form Builder; however, such forms will be shown in the Form Builder version 3.x GUI known as Static Layout Editor view. In this view, the sizes of form elements must be specified in pixels, and the controls and other form elements remain in a fixed position on the form canvas. Note that Form Builder's Static Layout Editor view is used to edit existing version 3.x forms only.



Editing an existing form

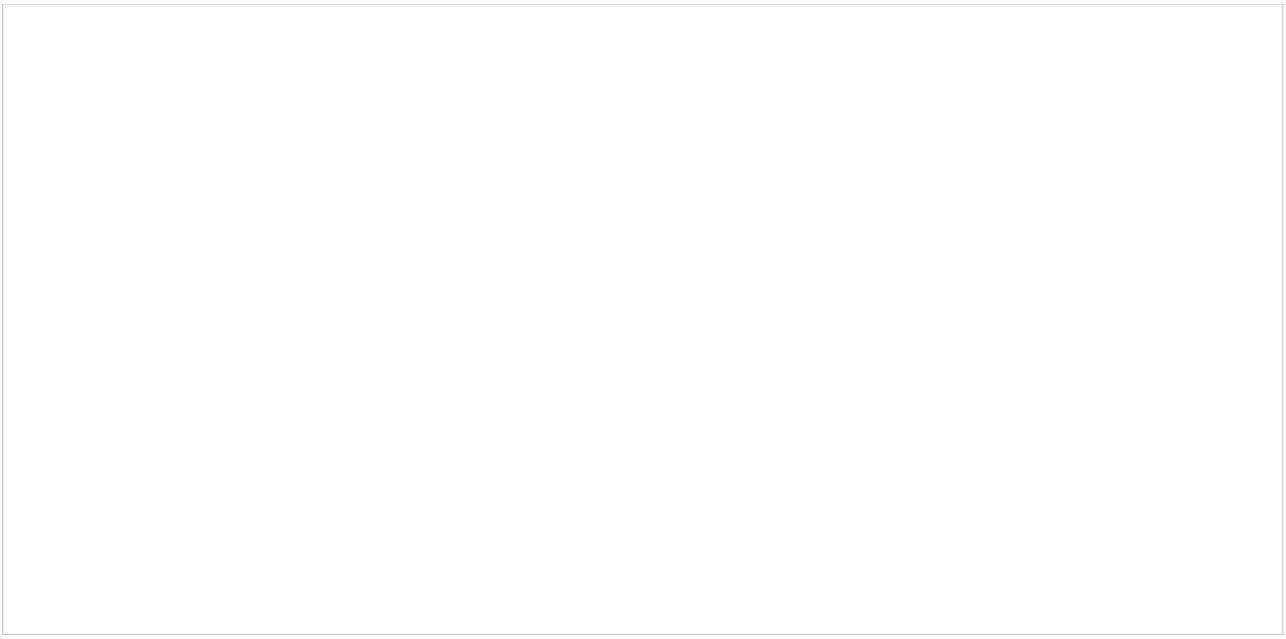
The subsequent sections of this guide describe how to work with specific form controls within both Form Builder Views. The controls are listed in alphabetical order in the *All Form Controls* section of this guide.

Dynamic UI Overview

In the Dynamic Layout Editor view, the Form Builder user interface is divided into the following areas:

- *Control Palette* (the list of system controls and all other types of controls), shown on the left-hand side of the screen
- *Form Canvas* (where the form is built and edited), shown in the middle of the screen
- *Properties Editor* (after selecting a control to edit), shown as a pop-up dialog

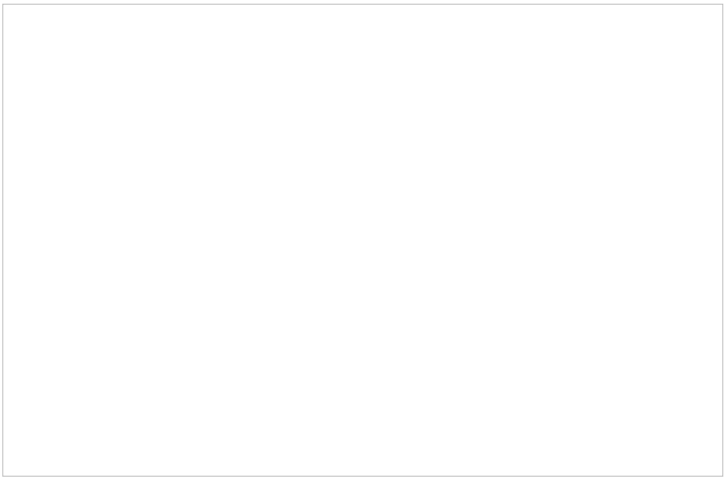
To define a new UI element for your form, select the corresponding control from the control palette, drag it to the desired location on the canvas, and specify its properties in the properties editor.



Form Builder UI

Form Settings

You can change the overall look of the form (i.e., label width, padding, margins, background color, etc.) by clicking the **Form-Wide Settings** icon at the top of Form Builder.



Form-Wide Settings

Upon clicking on the **Form-Wide Settings** icon, a properties dialog will open. There, you can edit the following settings:

- Label width (% of column)
- Column padding (px)
- Control padding (px)
- Margin around form (px)
- Background color

Pages

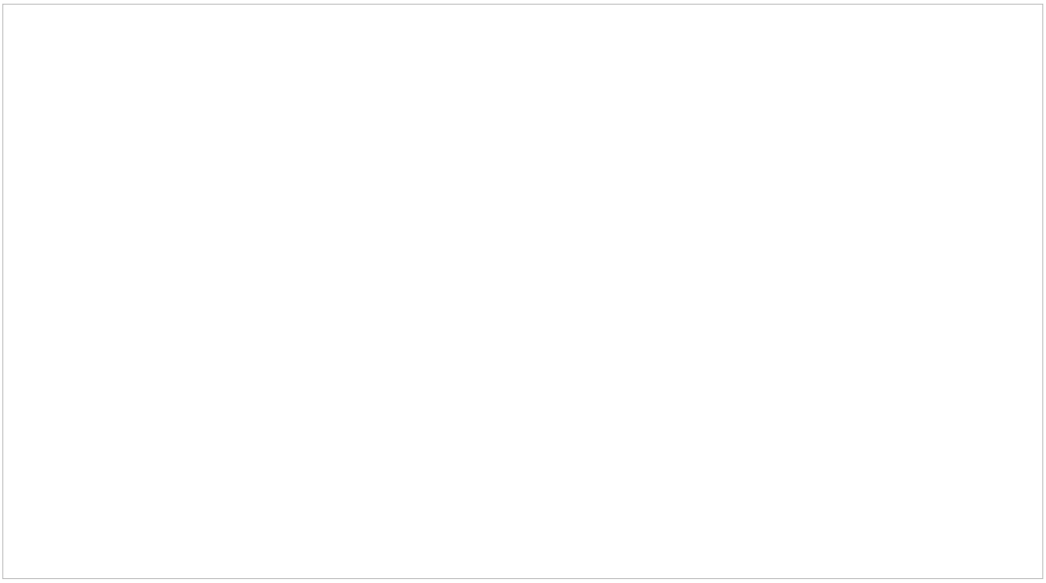
Form Builder allows you to create and edit multi-page forms. You can quickly add pages, remove pages, and browse all available pages using the thumbnail previews on the left-hand side of the UI.

The thumbnail column (and all the thumbnails within it) can be resized by holding and clicking on the vertical bar that divides the thumbnails and the Control Palette.

How to Add or Remove Pages

By default, each form begins with one page called "Main Page." To add a new page, hover your cursor over the Main Page thumbnail or any other available page thumbnail and click **+**.

Similarly, you may remove a page from the form by clicking**x**. Note that the last page of a form cannot be removed.

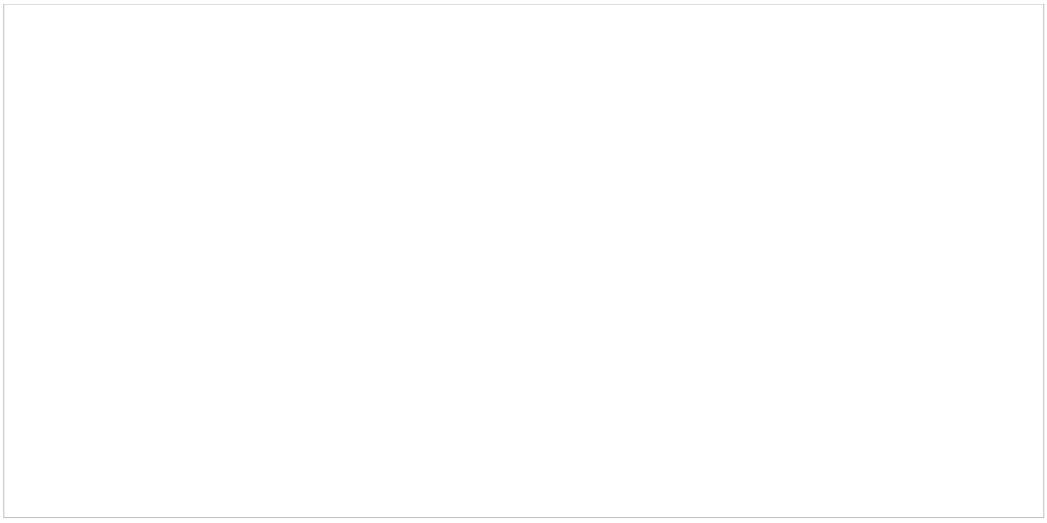


Add or remove a page

How to Edit Page Names

Once you have added a page to your form, you are free to edit the name of that page.

1. Select the page thumbnail.
2. In the Title bar of the UI, hover your cursor over the current page name (e.g., "New Page") and click the Pencil icon.

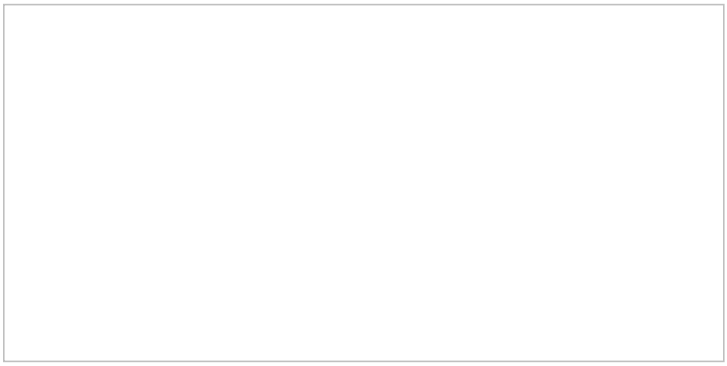


Click the Pencil icon to edit the page name

3. In the *Page Name* dialog that appears, enter the desired page name and click **OK**.

Give your page a new name

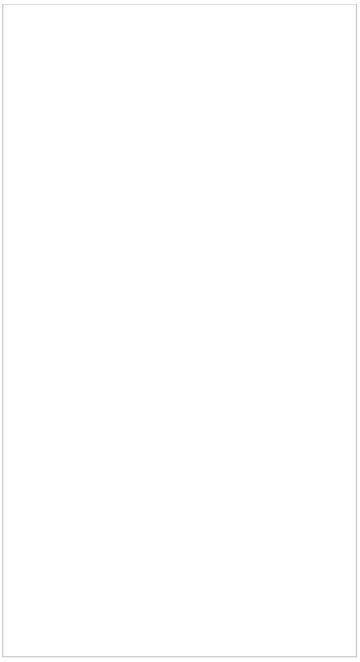
4. The new page name appears on the form page and its thumbnail preview.



Renamed form page

Control Palette

The *Control Palette* lists each available type of control (previously called "form components") and each one has its own configuration attributes that specify the function performed by the control.



Form controls

System Controls

System Controls are controls that can be present only once on each page of the form. When dragging a system control a second time, the current location is highlighted, and after dropping the new control, you will be asked, “Would you like to move the XXX control? [Move] [Cancel].”

Section is a system control that is always shown in the first position on the Control Palette list. The *Section* system control allows you to define the number of sections that appear on the form. To add or remove sections, select the checkbox beside each available column space in the section control bar (see the gray bar with the **[=]** symbol). The checkboxes appear upon mouse-over.

Add or remove sections using the form section bar

Other Control Types

All other controls can be placed on a form any number of times. It is forbidden to create controls with the same name on the same page of the form (an error dialog appears when applying property dialog or moving away from a docked property sheet). Controls with the same name on different pages must have the same type, in order to show the same field on different pages.

Controls that can be present in multiple instances include the following:

- Contact-email
- Contact-phone

- Contact-address
- Contact-messaging-app-account

When added, these controls will show all instances of the field associated with an object.

Working with Controls

Form controls are the building blocks of your form. You can easily drag them on and off the form canvas. This section describes how to add, edit, and remove form controls in Form Builder's Static Layout Editor.

For more information about form controls and their properties, see the next section of this guide,*Dynamic Layout Editor Controls*, which includes all the form controls available in the Dynamic Layout Editor view. Note that these controls are not available in the Static Layout Editor view.

How to Add Controls

Controls are dragged and dropped onto and off of the form canvas. After a control has been placed on the form canvas, you can drag it to a different location on the form. Once a control has been placed, mousing over it will display a pencil icon for editing the control's properties.

How to Edit Controls

Once a control has been placed on the form canvas, mousing over it will display a pencil icon for editing the control's properties. Click the pencil icon to edit the control's field properties.

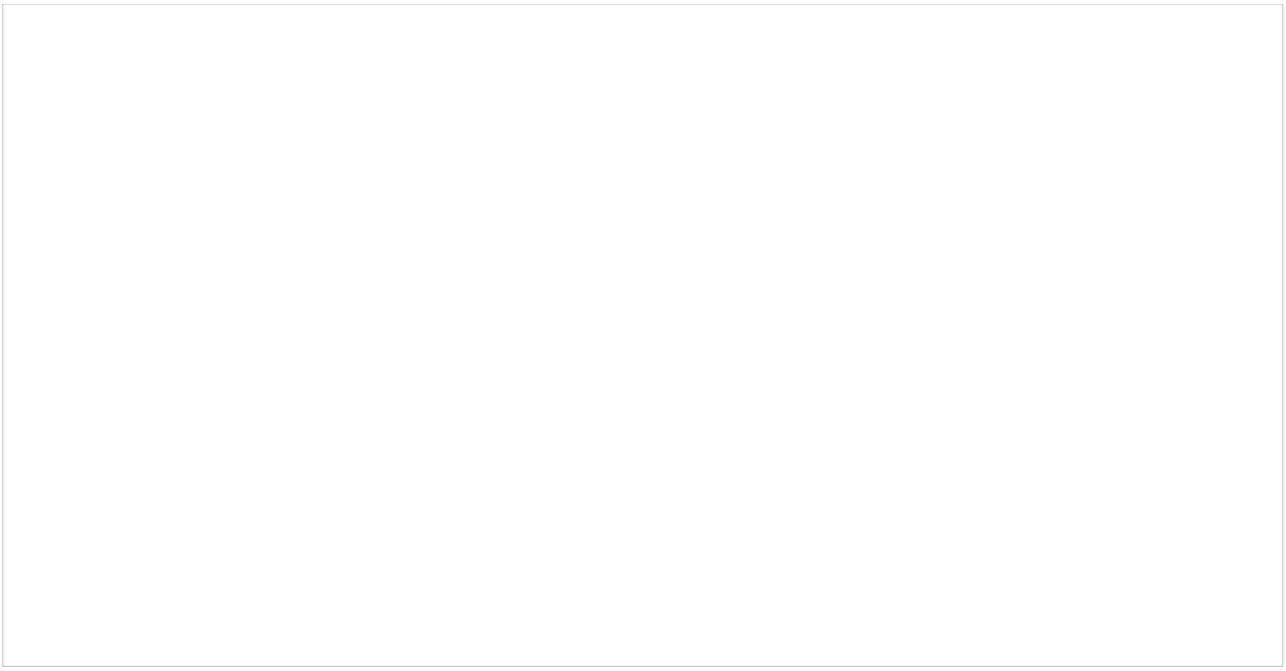
The properties will open in a pop-up dialog. If you do not wish to edit properties in the pop-up dialog, you can opt to dock the properties to the form canvas by clicking the *Dock to main window* button.

How to Remove Controls

Mousing over a control on the form canvas will display a trash icon to delete the control. Click the trash icon to remove the control from the form.

Style

Note that all controls that may have text in them have a common property called *Style*. Styles control the appearance of the static text on your form, such as font type, font size, text color, and alignment.



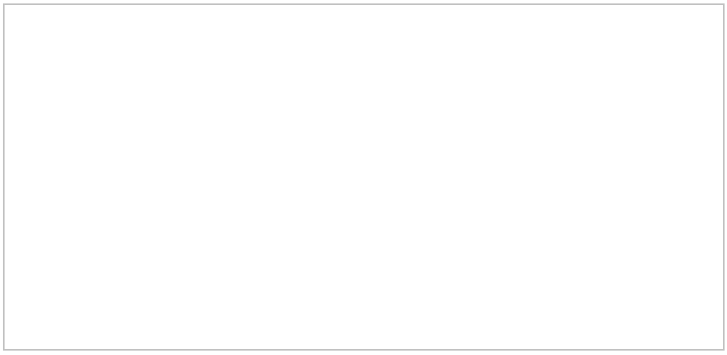
Editing form field styles

Bright Pattern Contact Center software provides a number of predefined styles that you can select from the drop-down menu. You can edit any of such predefined styles, or you can create your own styles from scratch:

1. Select the style that you wish to edit from the drop-down menu (to create a style from scratch, select**None**).
2. Click **Add / Edit**.
3. Specify style properties.

Data Fields

The values of many form components can be defined in data fields asscenario variables in the *$(varname)* format.

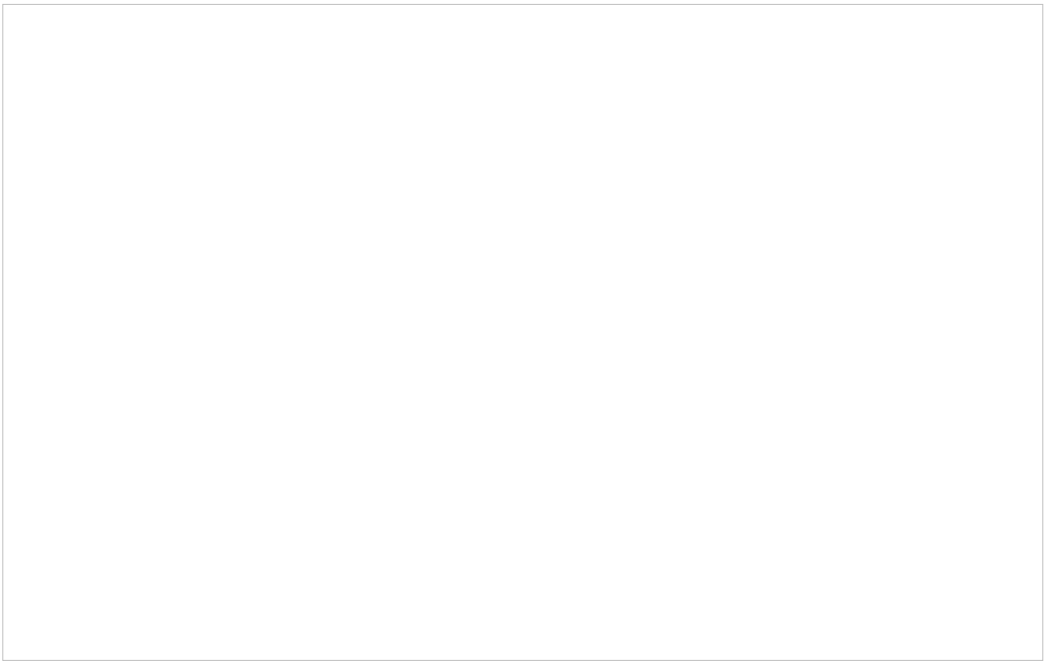


Example of a variable in a data field

Previewing and Saving Forms

To see how your form will appear in the Agent Desktop application, click the**Preview** menu button. Your form will be shown in either *Read-only view* or *Editable view* (select the radio button for the desired view). A slider at the top of the preview allows you to zoom in and out of the form to increase or decrease the width of the form. The default zoom is 50% of screen width, the maximum zoom is 100% screen width, and the minimum screen width is 10%.

In *Editable view*, as shown, you can edit within the form preview and your changes will be saved. You can return to editing the form by clicking **Close**.



Editable form view

To save changes made to a form, click **Save**.

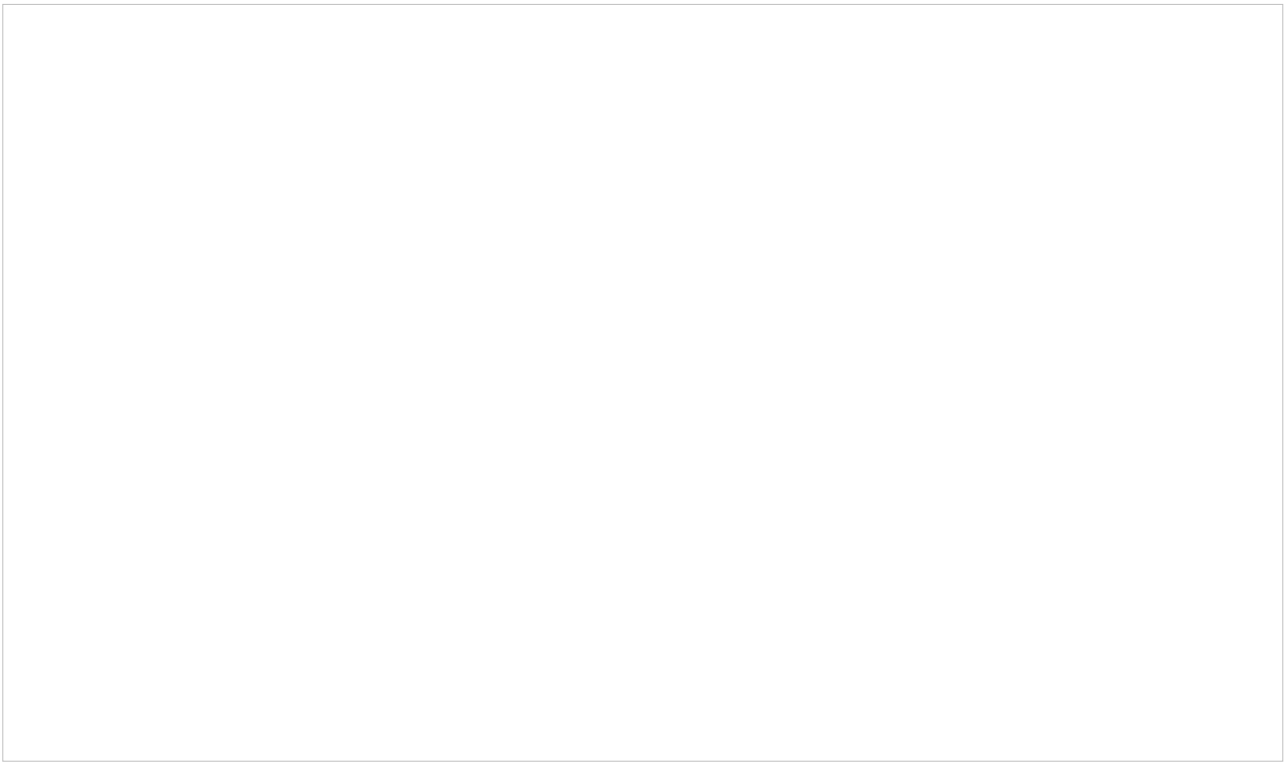
The subsequent sections of this guide describe specific form controls, their attributes, and usage. The controls are listed in the order in which they appear in the menu.

Static UI Overview

In the Static Layout Editor view, the Form Builder user interface is divided into the following areas:

- *Control Palette* (the list of system controls and all other types of controls), shown on the left-hand side of the screen
- *Form Canvas* (where the form is built and edited), shown in the middle of the screen
- *Properties Editor* (after selecting a control to edit), shown on the right-hand side of the screen

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



Form Builder UI

Form Grid Settings

You can change the overall look of the form (i.e., label width, padding, margins, background color, etc.) by clicking the **Grid...** button at the top of Form Builder.

Upon clicking on the **Grid...** button, the *Form Grid Settings* dialog will open.

Form Grid Settings

There, you can edit the following settings:

- **Columns** - The number of columns on the form (e.g., "10")
- **Column width, px** - The column width in pixels (e.g., "100")
- **Rows** - The number of rows on the form (e.g., "5")
- **Row height, px** - The row height in pixels (e.g., "25")
- **Resulting form size** - The width and height of the finished form (e.g., "1000px × 125px")
- **Margin around form, px** - The amount of space on the outer edges of the form in pixels (e.g., "10")
- **Background color** - Background color of the form (e.g., "White Smoke")
- **Form label width, px** - The width of each form label in pixels (e.g., "40")

Pages

You can have multiple pages on a form. The page selector allows you to select a form to view and edit.

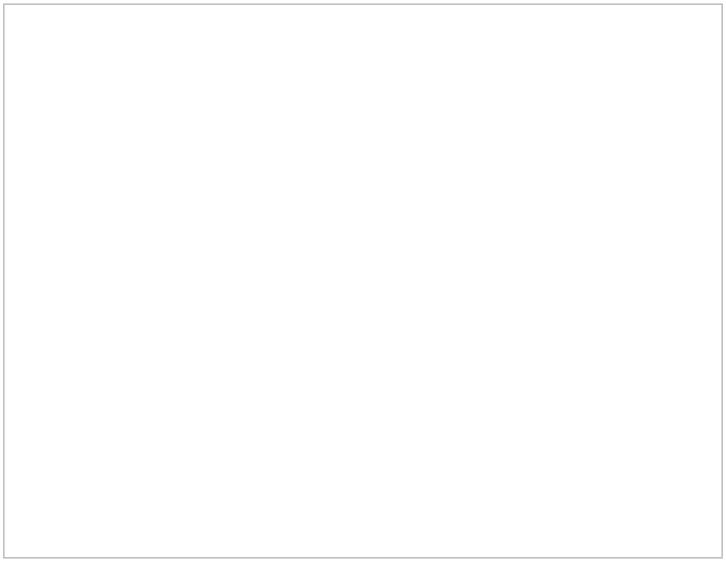
Page selector

The Form Pages **...** button, located to the right of the page selector, allows you to work with multiple form pages. Upon clicking it, the *Form Pages* dialog opens, where you can take the following actions:

- **View** all form pages

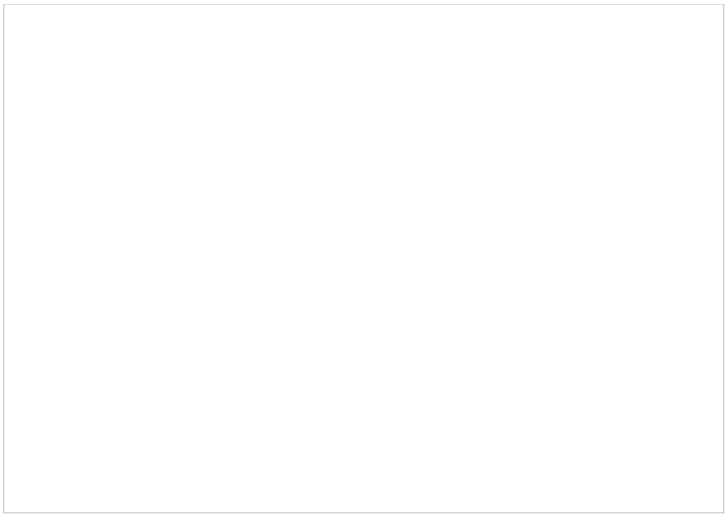
View all form pages

- **Add** more form pages by clicking **add**



Add new form pages

- **Edit** the name of a form page



Edit the form name and click the green checkmark to save your changes

- **Delete** a form page by clicking
- **Clone** a form page by clicking

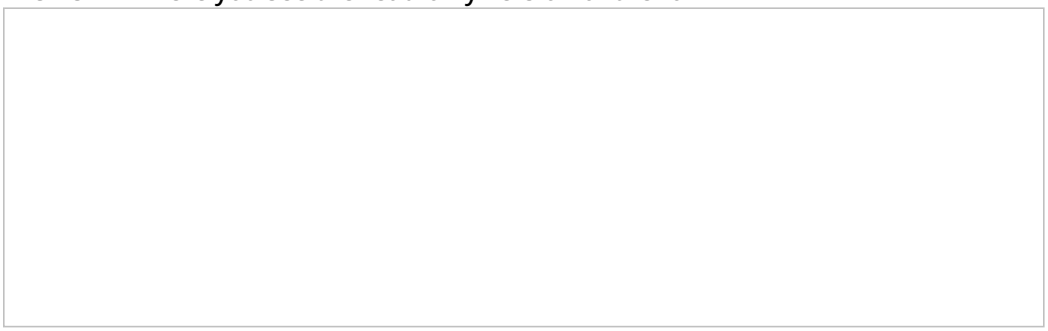
View Button

Three different views are available in Form Builder:

- **Configuration** - Where you edit the properties of all your form elements

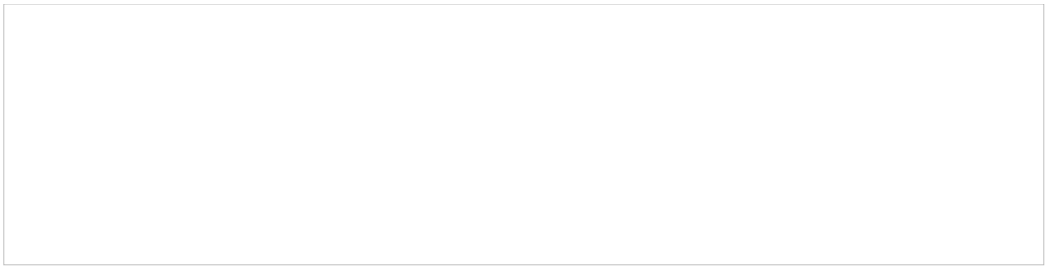
Configuration view

- **Preview** - Where you see the read-only version of the form



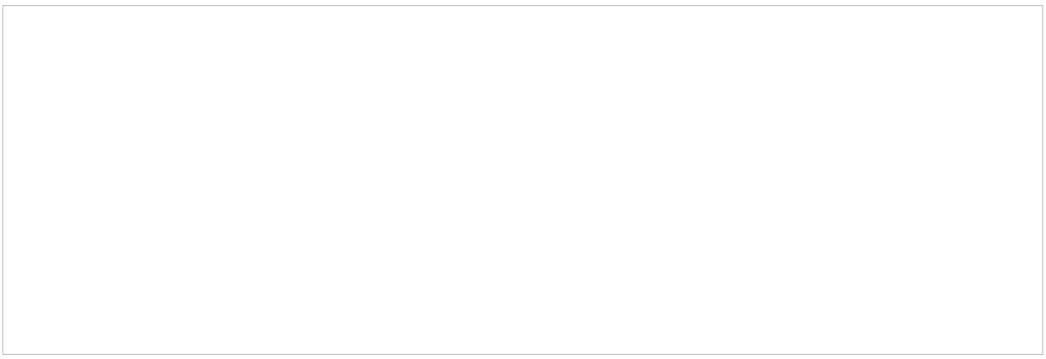
Preview

- **Editable** - A dynamic view where you can both preview the form and type into each field of the form



Editable

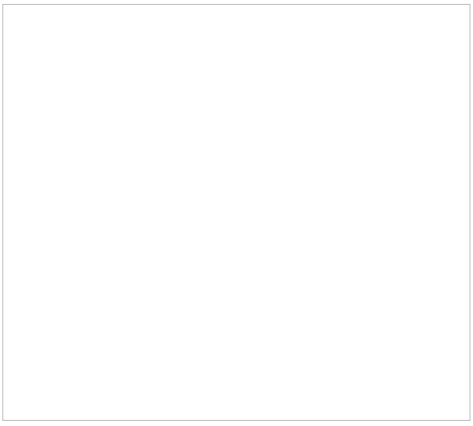
Clicking the **View** button allows you to switch between these views. Once you select a view from the selector, the button assumes the name of the view.



The View button allows you to select from Configuration, Preview, and Editable views

Control Palette

The *Control Palette* lists each available type of control (previously called "form components") and each one has its own configuration attributes that specify the function performed by the control.



Form controls

System Controls

System Controls are always present at the top of Form Builder. Either buttons or selectors, these controls include *Grid...* for changing the form settings, the page selector for choosing which form page to edit and/or view, the Form Pages **...** button for adding more pages to the form, and the view button for switching between Form Builder views (i.e., *Configuration*, *Preview*, and *Editable*).

Other Control Types

All other controls can be placed on a form any number of times. It is forbidden to create controls with the same name on the same page of the form (an error dialog appears when applying property dialog or moving away from a docked property sheet). Controls with the same name on different pages must have the same type, in order to show the same field on different pages.

Controls that can be present in multiple instances include the following:

- Contact-email
- Contact-phone
- Contact-address
- Contact-messaging-app-account

When added, these controls will show all instances of the field associated with an object.

Using Form Controls

Form controls are the building blocks of your form. You can easily drag them on and off the form canvas. This section describes how to add, edit, and remove form controls in Form Builder's Static Layout Editor.

For more information about form controls and their properties, see the next section of this guide,*Static Layout Editor Controls*, which includes all the form controls available in the Static Layout Editor view. Note that these controls are not available in the Dynamic Layout Editor View.

How to Add Controls

Controls are dragged and dropped onto and off of the form canvas. After a control has been placed on the form canvas, you can drag it to a different location on the form. Once a control has been placed, mousing over it will display a pencil icon for editing the control's properties.

How to Remove Controls

To delete a control, click and hold a control on the Form Canvas, and then drag it over to the Control Palette.

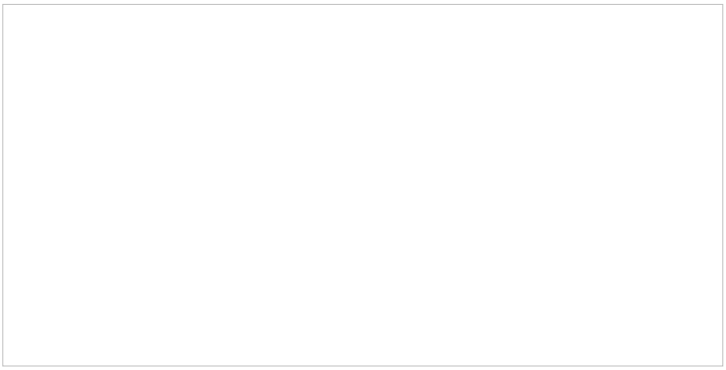
How to Edit Controls

Once a control has been placed on the form canvas, you can edit the control's field properties by clicking anywhere on the control itself. The selected control will be outlined in red. The properties will open on the right-hand side of the UI.

How to Edit Styles

Note that all controls that may have text in them have a common field property called *Style*. Styles control the appearance of the static text on your form, such as font type, font size, text color, and alignment.

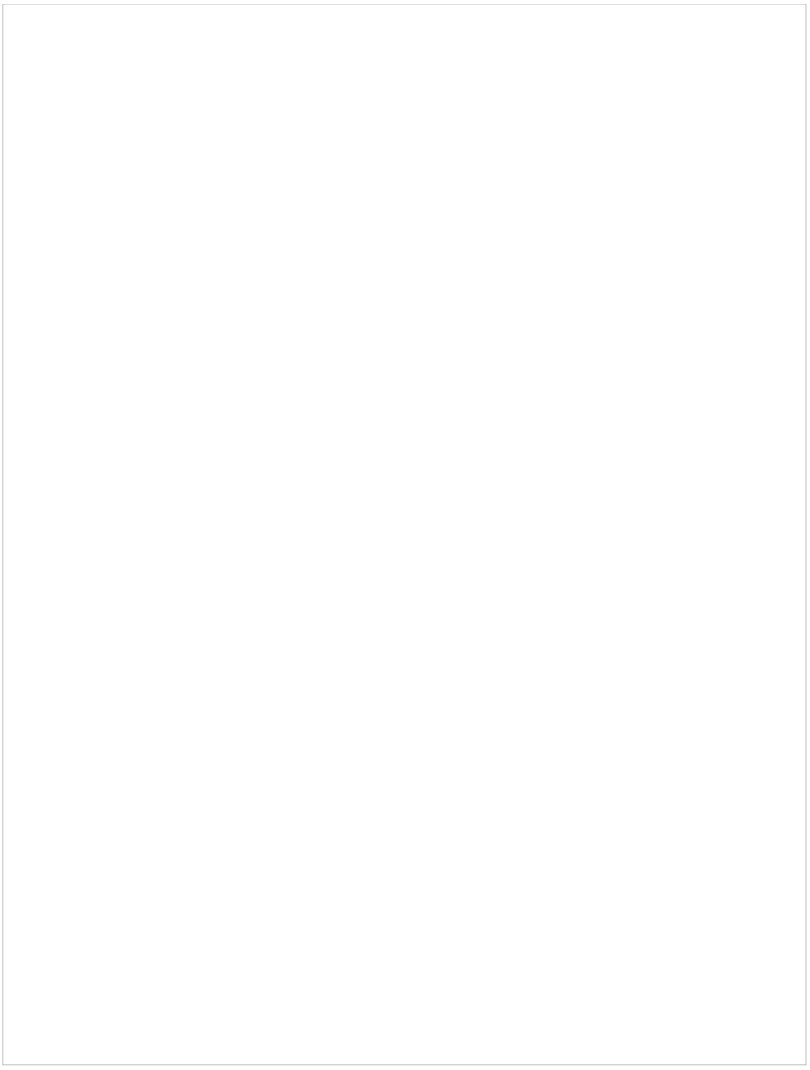
Bright Pattern Contact Center software provides a number of predefined styles that you can select from the drop-down menu.



Selecting a style

You can edit any of such predefined styles, or you can create your own styles from scratch:

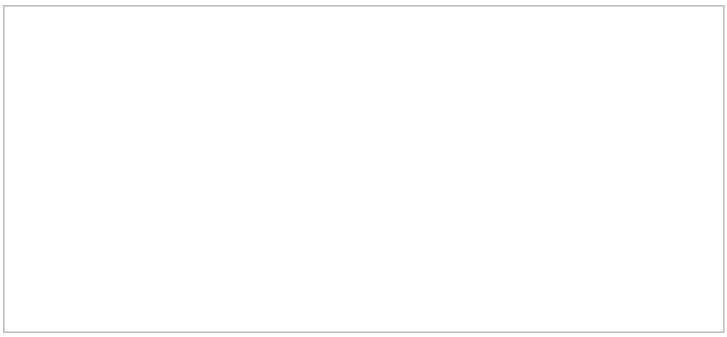
1. Select the style that you wish to edit from the drop-down menu (to create a style from scratch, select**None**).
2. Click **Add / Edit**.
3. Specify style properties.



Editing form field styles

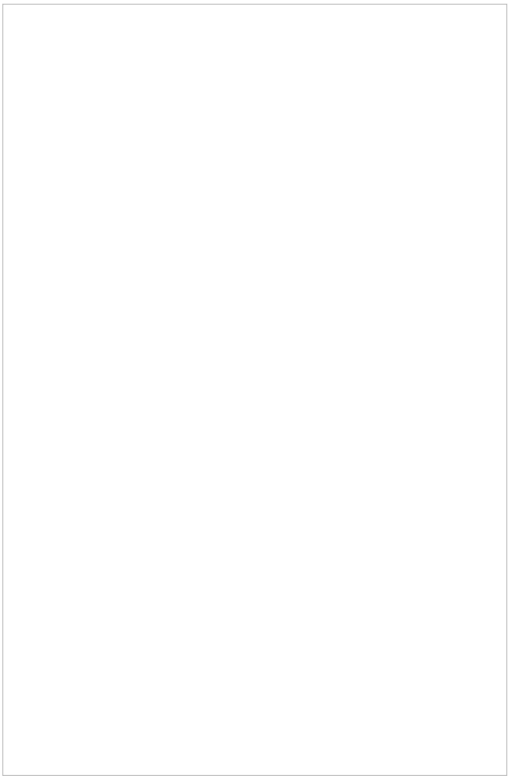
How to Use Data Fields

The values of many form components can be defined in data fields asscenario variables in the *$(varname)* format. Beside certain field properties, you will see the **$()** link.



Form variable link

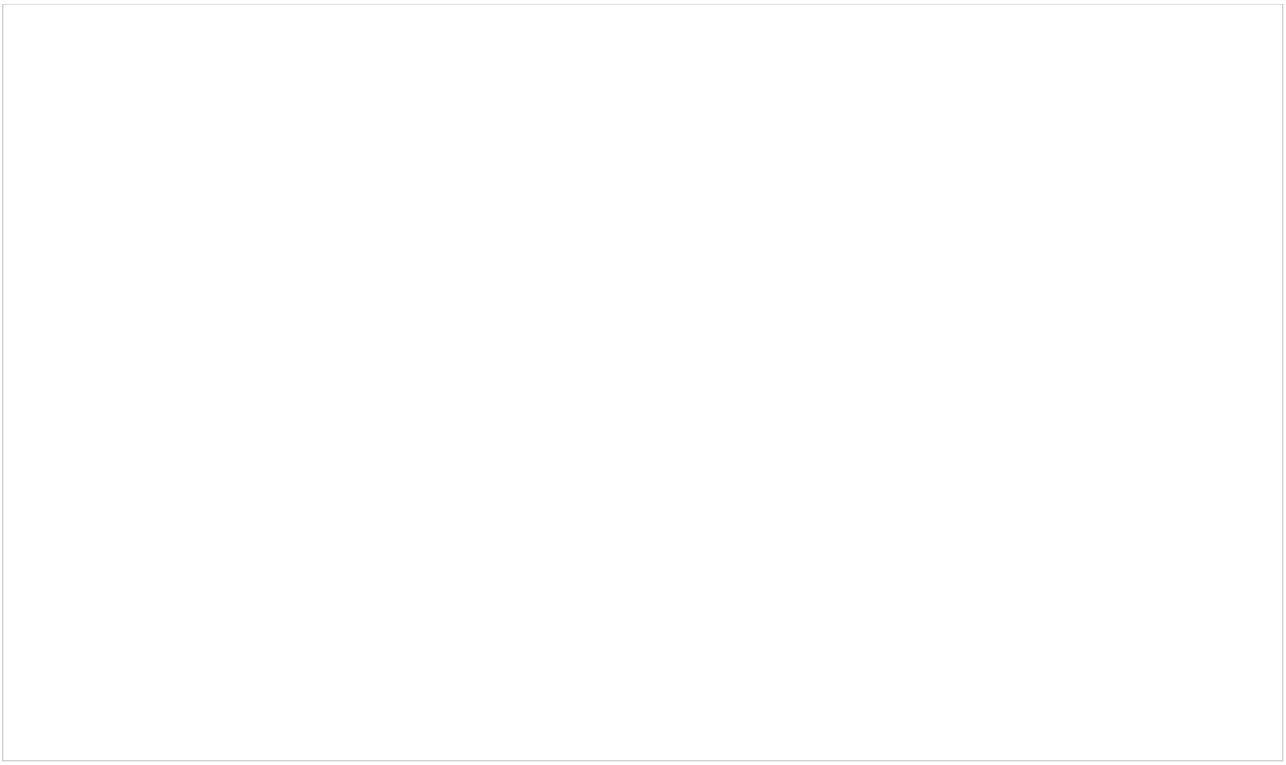
When clicked, the Mapping dialog opens, allowing you to select a specific variable to map data. For example, selecting "Primary email" in the mapping dialog shown will place the primary email variable into the form control's field, in turn populating the field with a specific email address.



Mapping a variable in a data field

Saving Forms

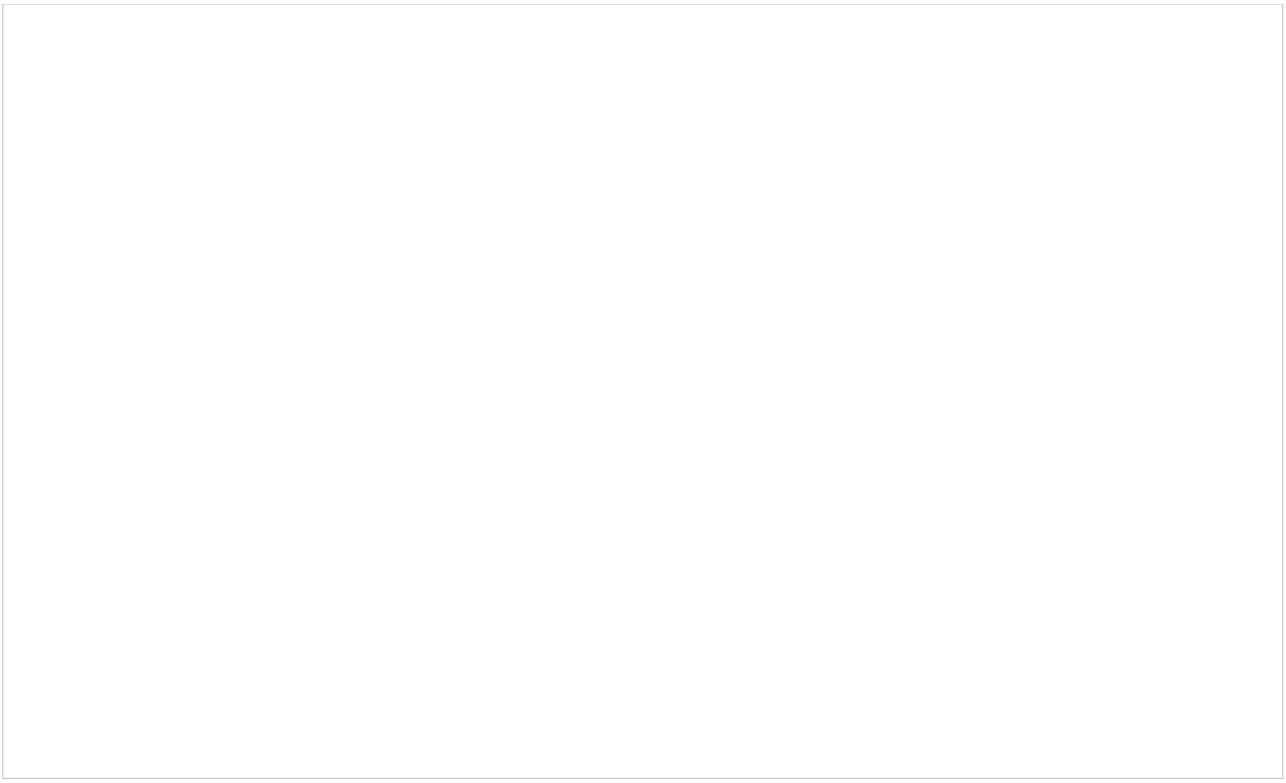
When you are done editing a form, be sure to click the **Save** button at the bottom of the screen.



Click "Save" to apply and save your changes

How to Cancel Your Changes

Clicking **Cancel** at the bottom of the screen will close the Form Builder application without saving any changes. Closing the browser tab or window has the same effect as using the **Cancel** button.

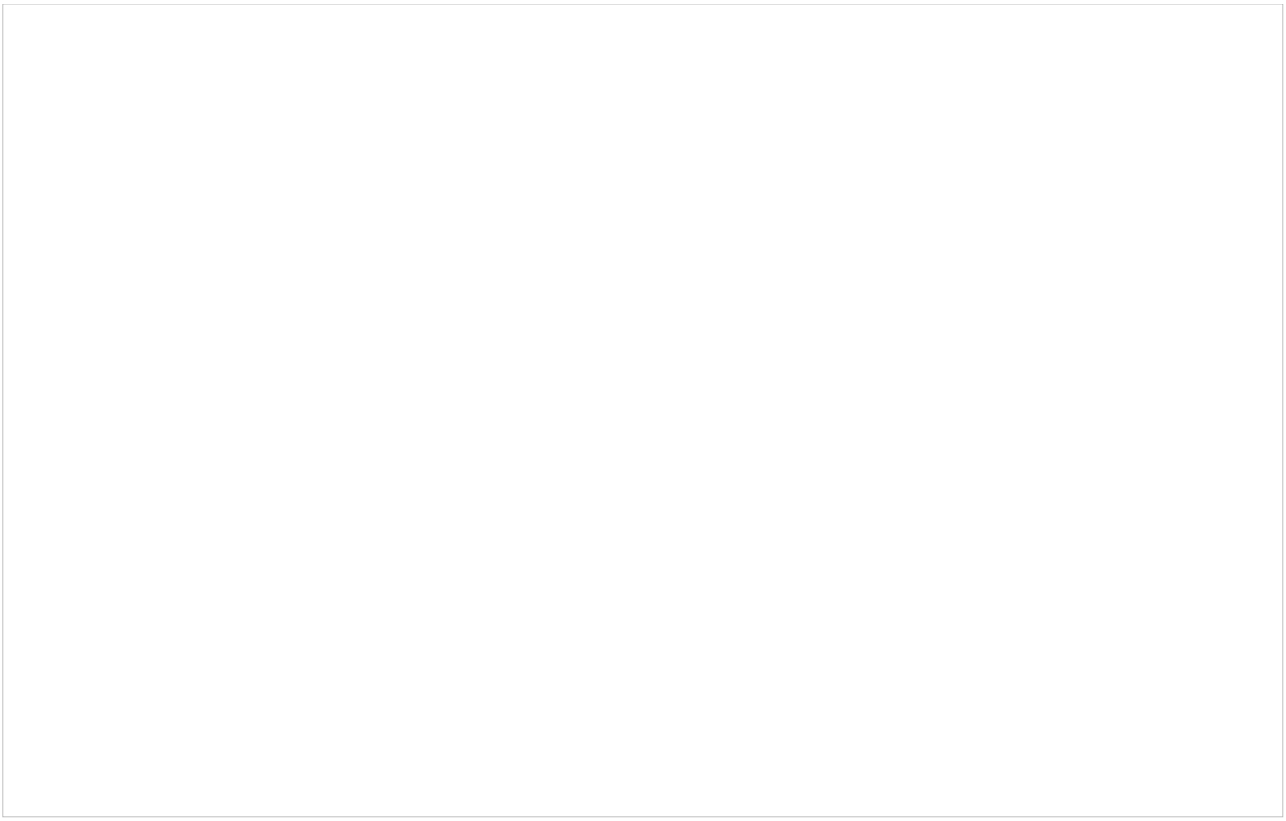


Cancel changes

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.

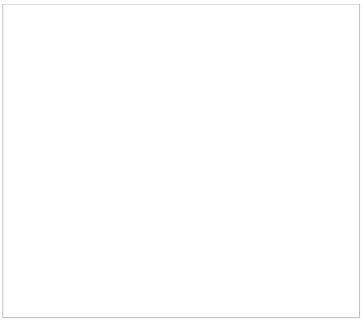
Mapping a form field to a custom Activity History field

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".

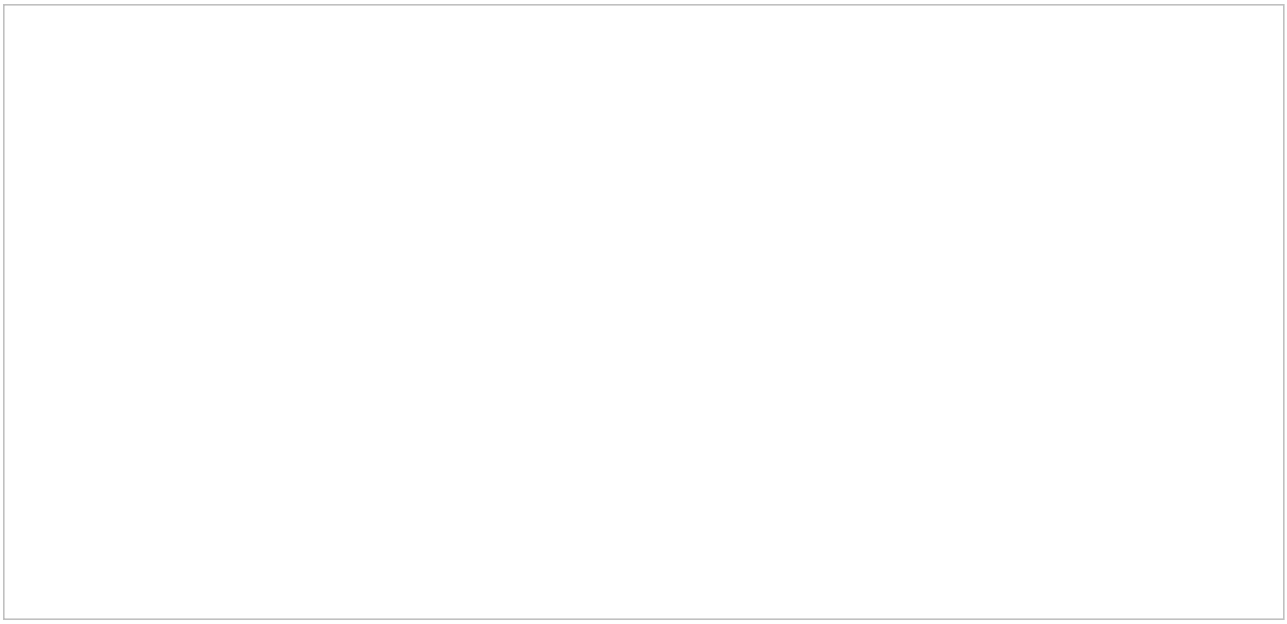
Additionally, you may clone pages using the **clone page** button. Clicking this button creates a new page titled "Clone of <page name>" and all controls are copied from the cloning page.



You may clone or add pages to your form

Step 3: Connect Your Form to a Service

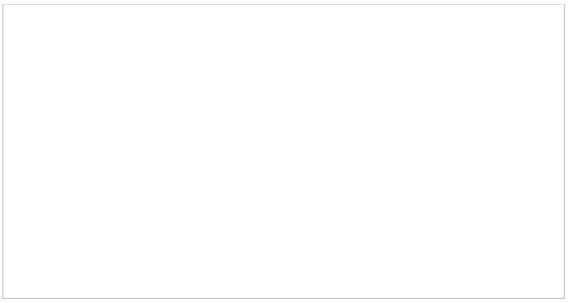
When you are finished building your form, you will need to connect it to a configured service. To do this, return to the Contact Center Administrator application, section Services & Campaigns > Activity tab. From the setting Enable screenpop activity form, you will select the name of the activity form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

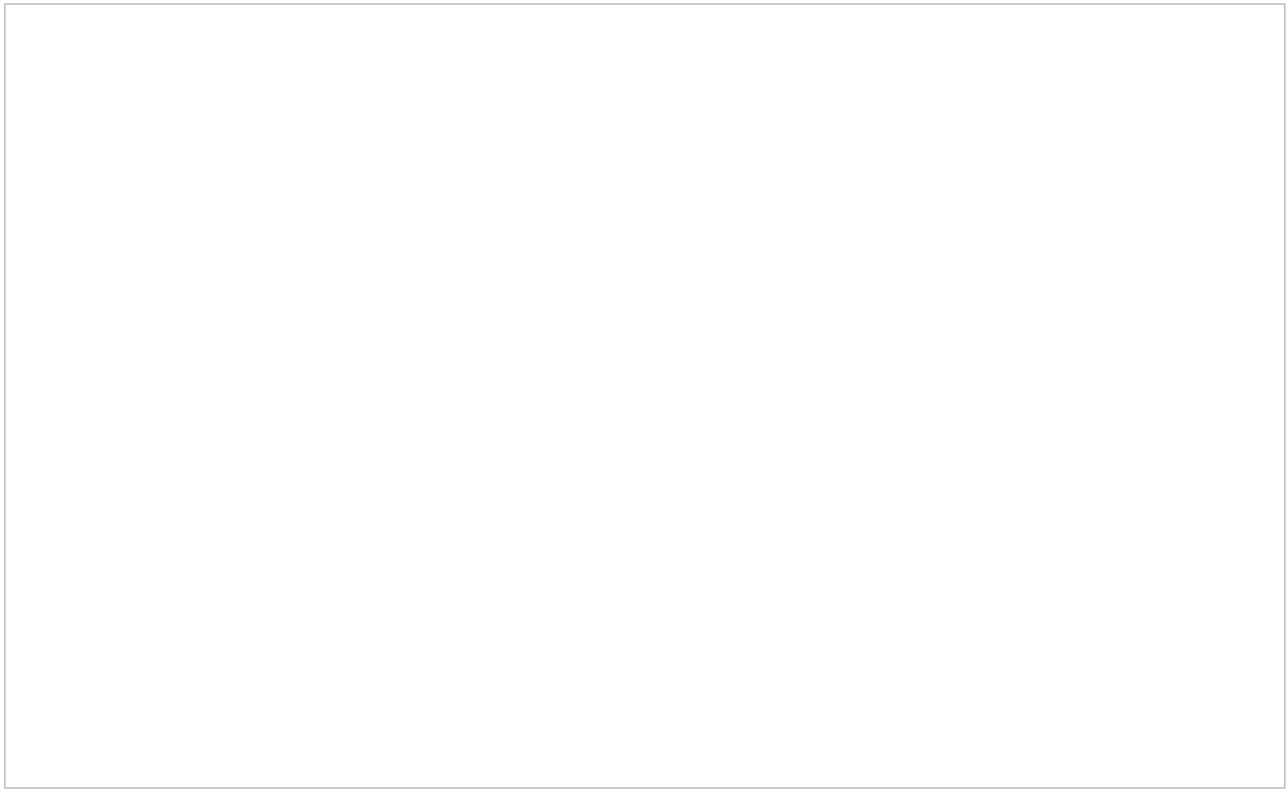
How to Configure Activity History Forms

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

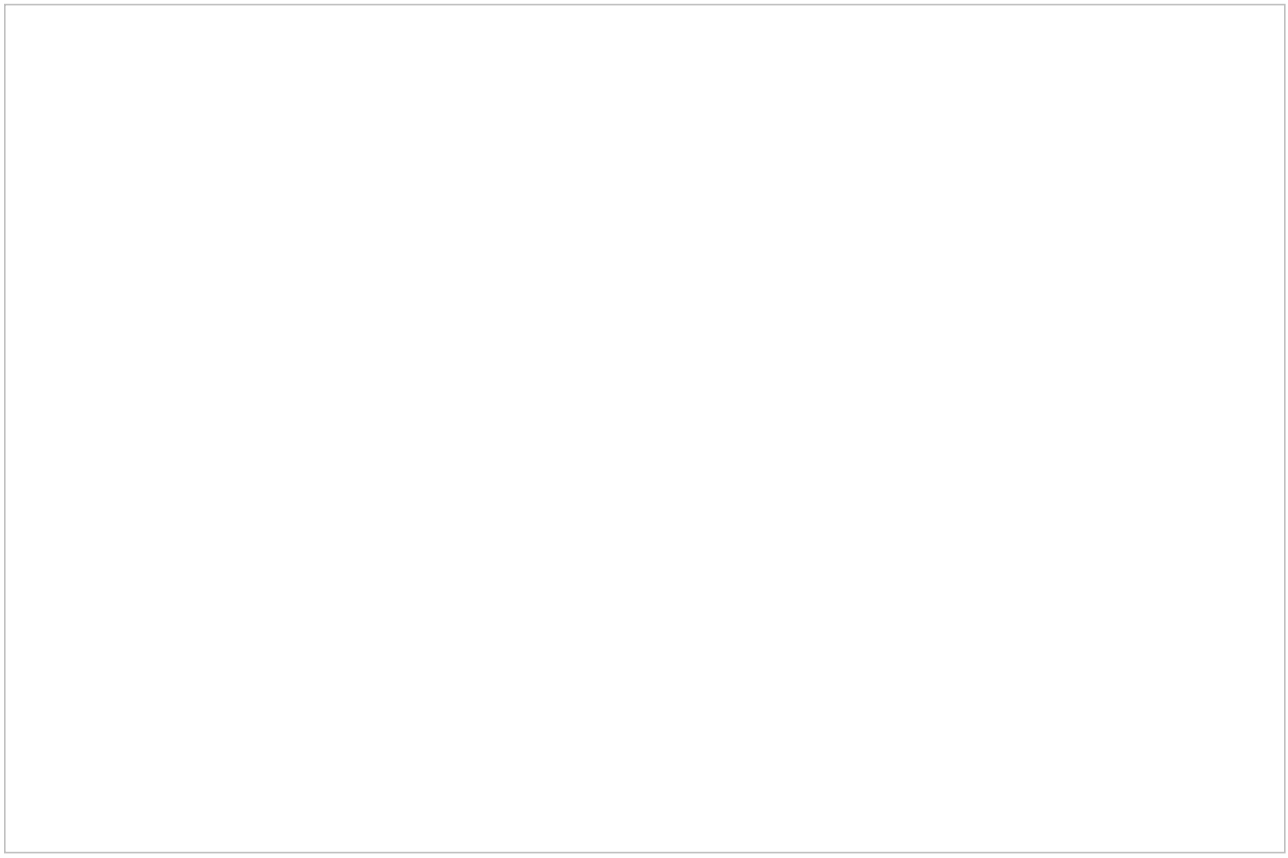
If you wish to include custom Activity History fields in your form, you must configure them first. For more information, see the *Contact Center Administrator Guide*, section Custom Fields > Activity History.

Procedure

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

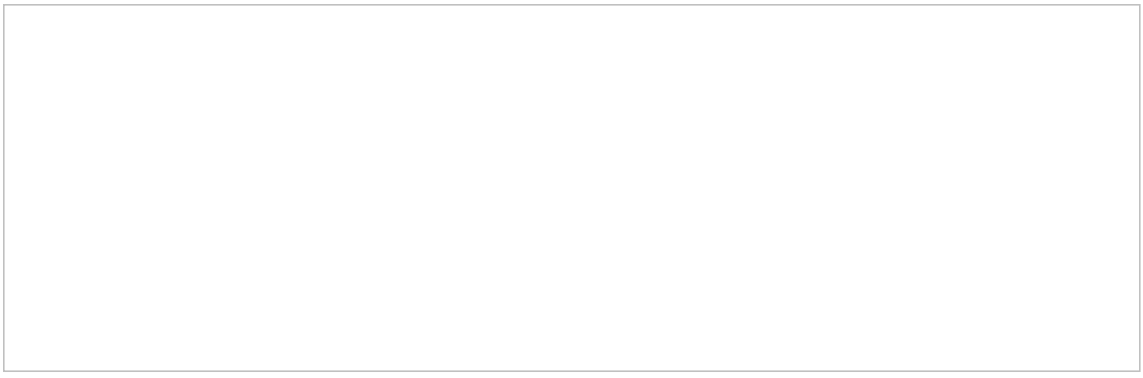
Action 2: Map Activity History Values to Form Fields

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

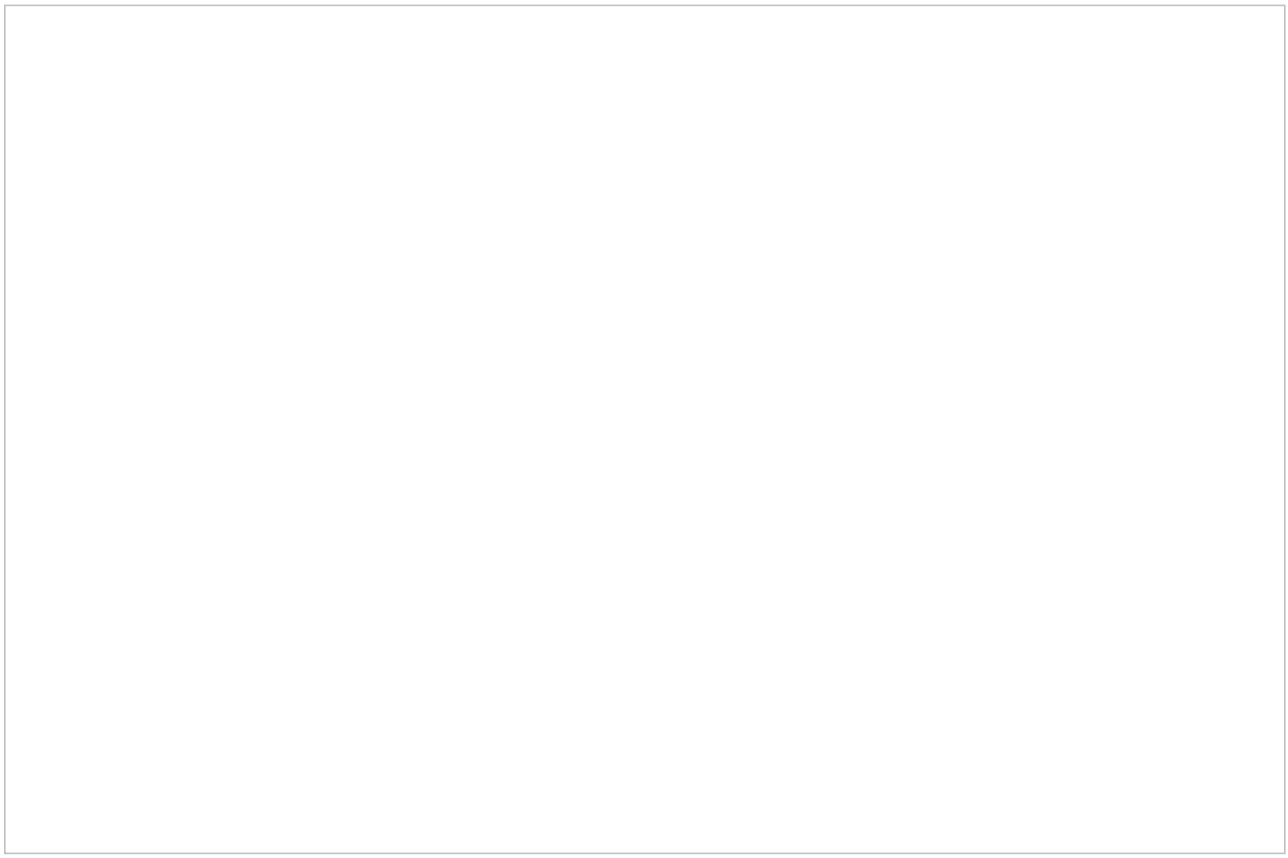
In our example, we added a list field to our form and mapped a custom Activity History field "verified_product" to it. Additionally, we added a non-editable Global Interaction ID field to the form. Note that your form fields will behave in the way you configured them to; however, the value of whatever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

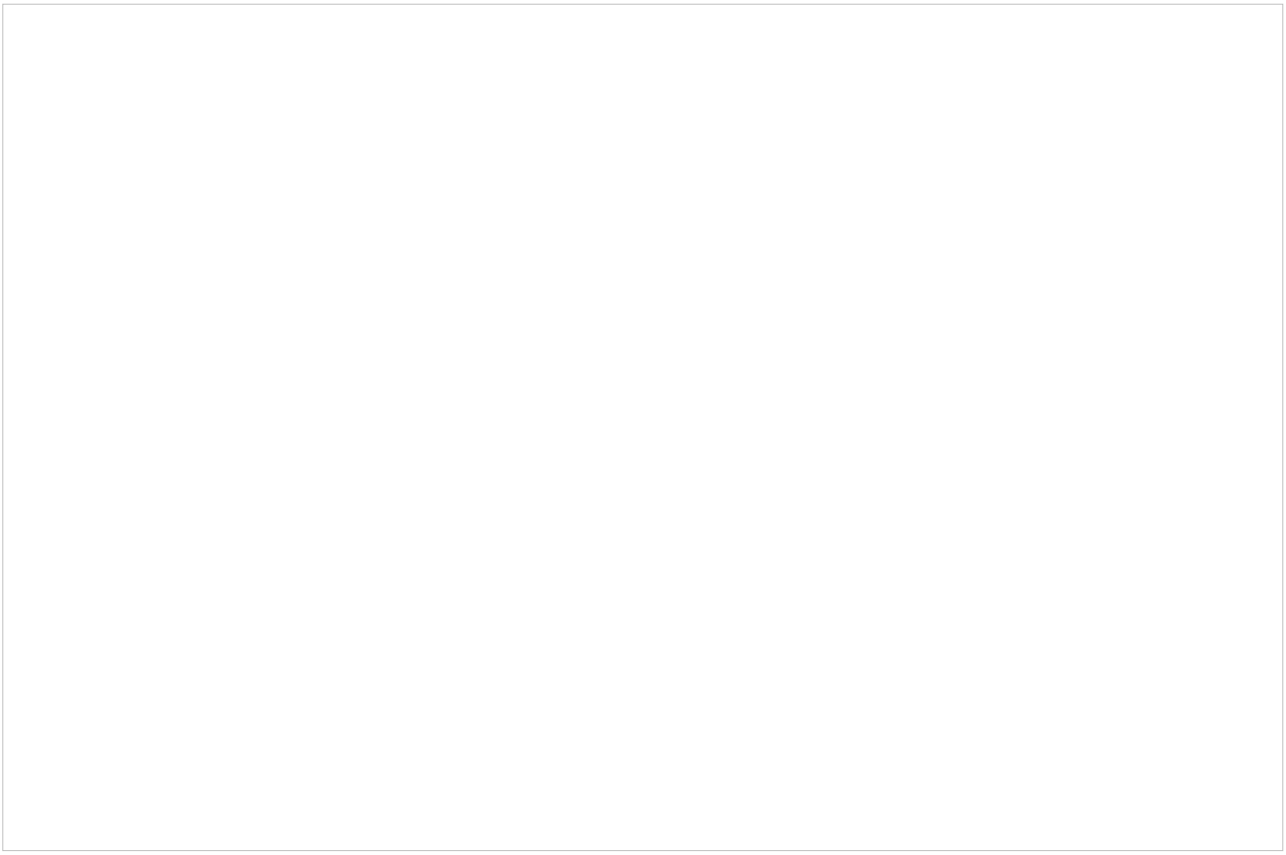
The same Activity History fields from the activity form are added to the Activity History form

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

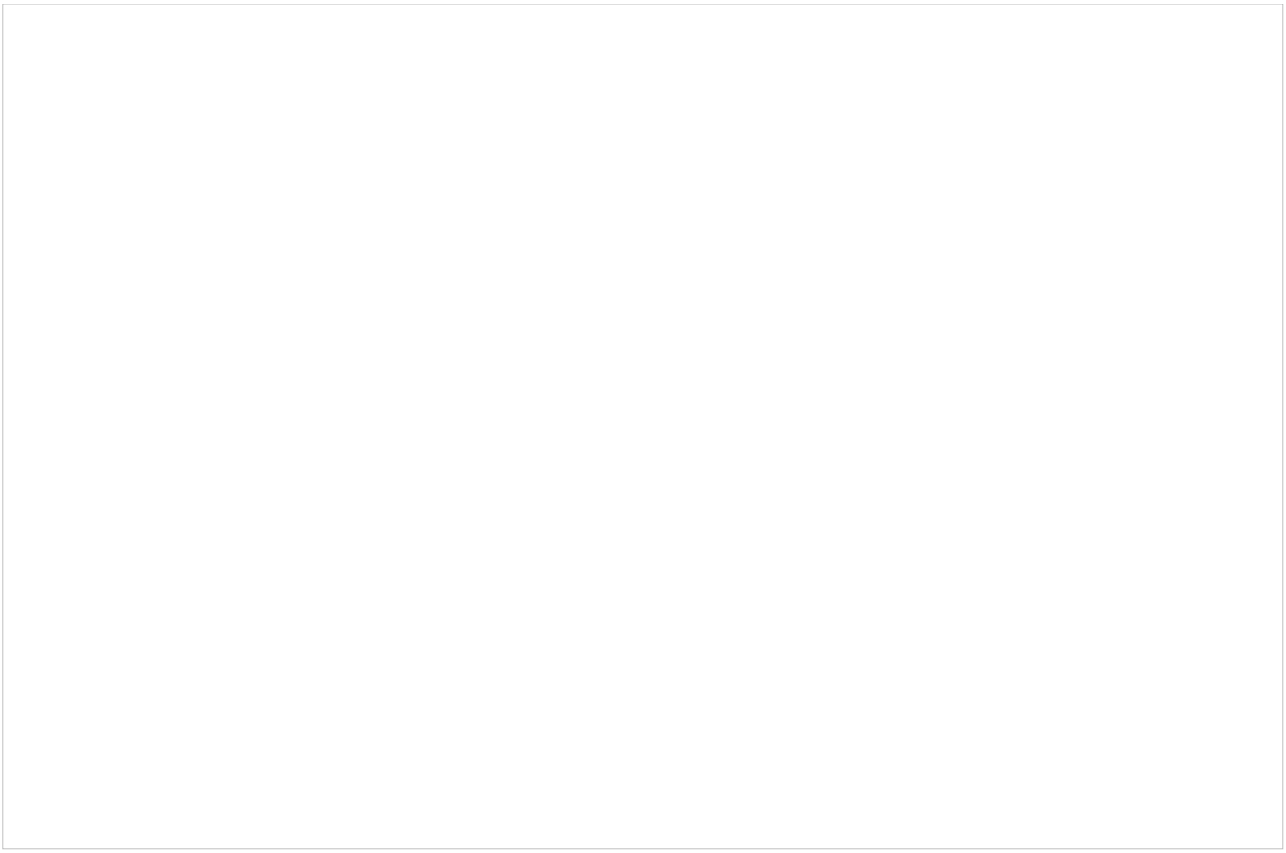
Your Forms In Action

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

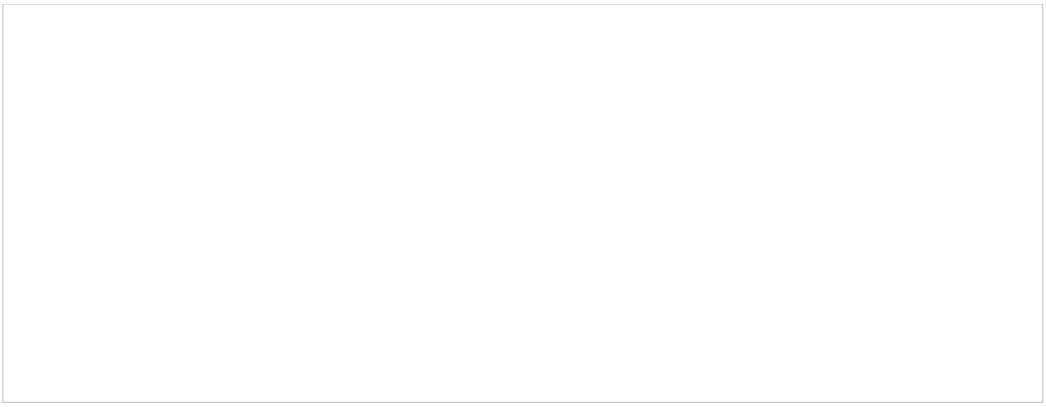
Customizing Activity History Forms to Show Notes

If you would like notes to appear in the list view in theActivity tab, found in section Search & Preview Records > Contacts, it is possible to configure a data field to show this information.

In order to do this, take the following steps:

- Open your Activity History form in the edit mode
- Add a Text field
- Map its data field to Activity History > Notes; it should show *$(ActivityHistory.notes)*

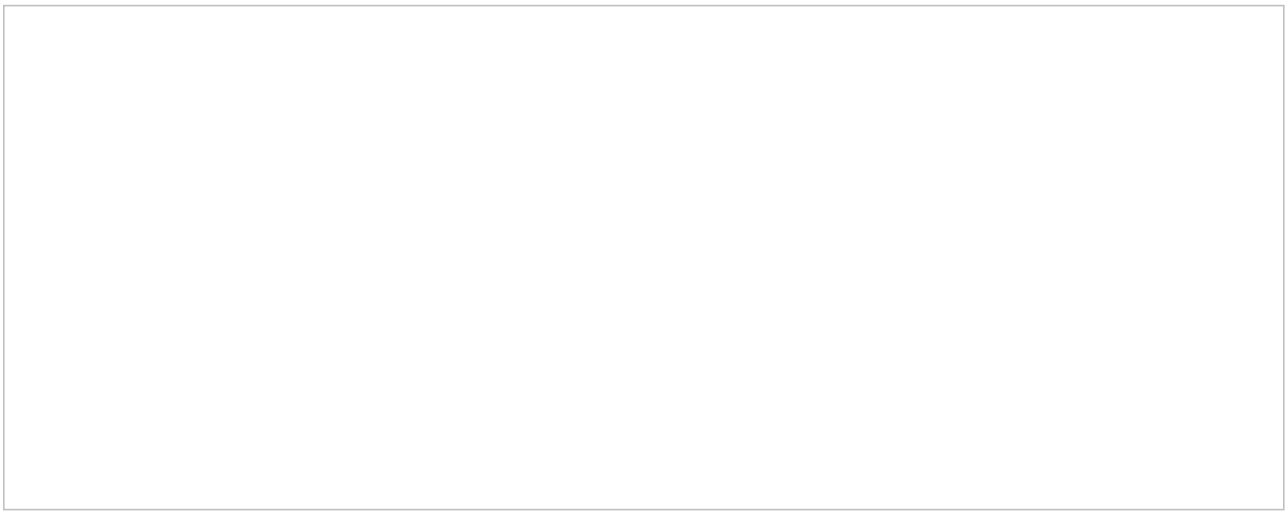
When this information is displayed, it is possible to copy and paste any text contained in the notes.



Adding "notes" to an Activity History form

How to Display Searchable Call List Columns in Activity Forms

For call centers that conduct calling campaigns, it is often desirable to display some of the data fromcalling list records in the agents' screenpop activity form. In this article, you will learn how to display searchable calling list columns in activity forms in Agent Desktop



Searchable call list records in Agent Desktop

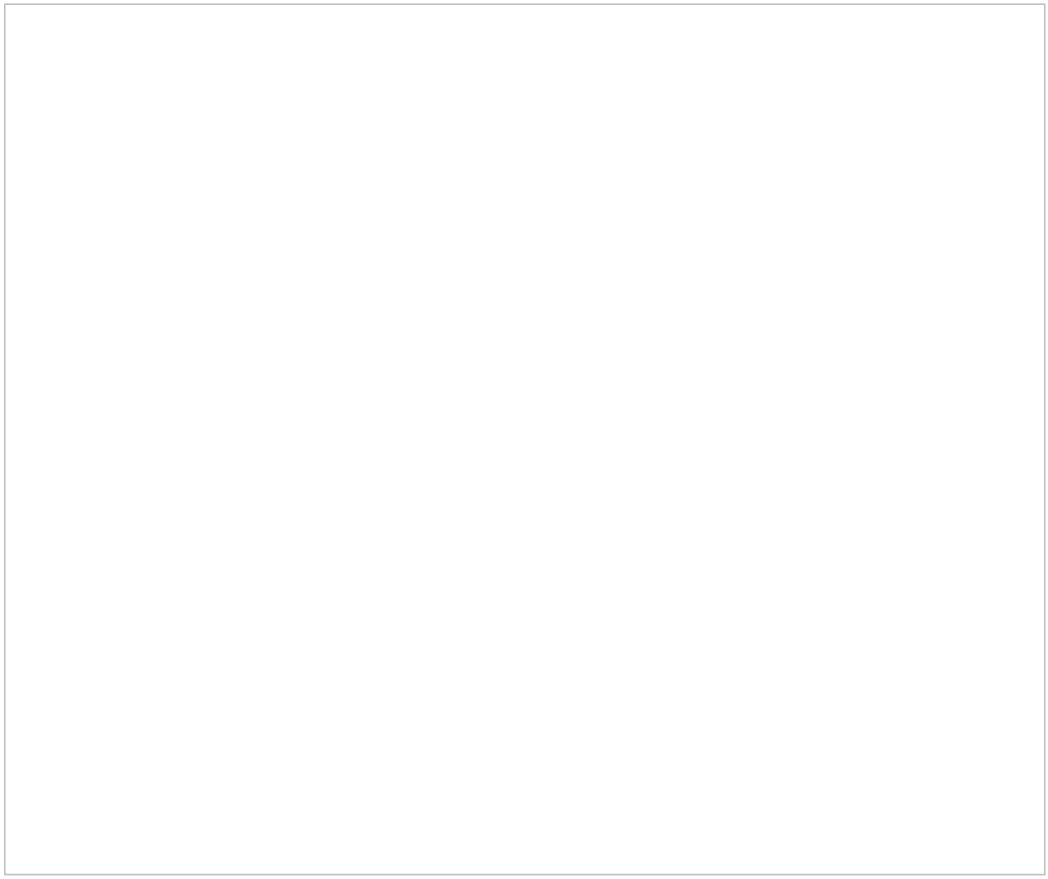
Prerequisites

Note that you should have familiarity with configuring forms. For more information, see the *Form Builder Guide*, section Form Builder Overview. Additionally, you should have familiarity with the Scenario Builder application, as this article describes screenpop functionality; in order for screenpop to work, your campaign's voice scenario must include the Web Screen Pop block.

Procedure

Step 1: Create a Call List with Searchable Fields

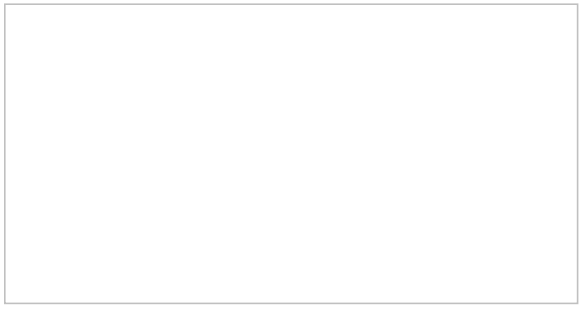
To begin, you will need to create and upload a calling list in section Lists. In the list import wizard, Fields screen, list columns must be marked as searchable. **Note**: Call list fields cannot be marked as searchable after they have been uploaded, so it is very important not to miss this step!



Mark the appropriate fields as "Searchable"

Step 2: Connect the Call List to a Campaign

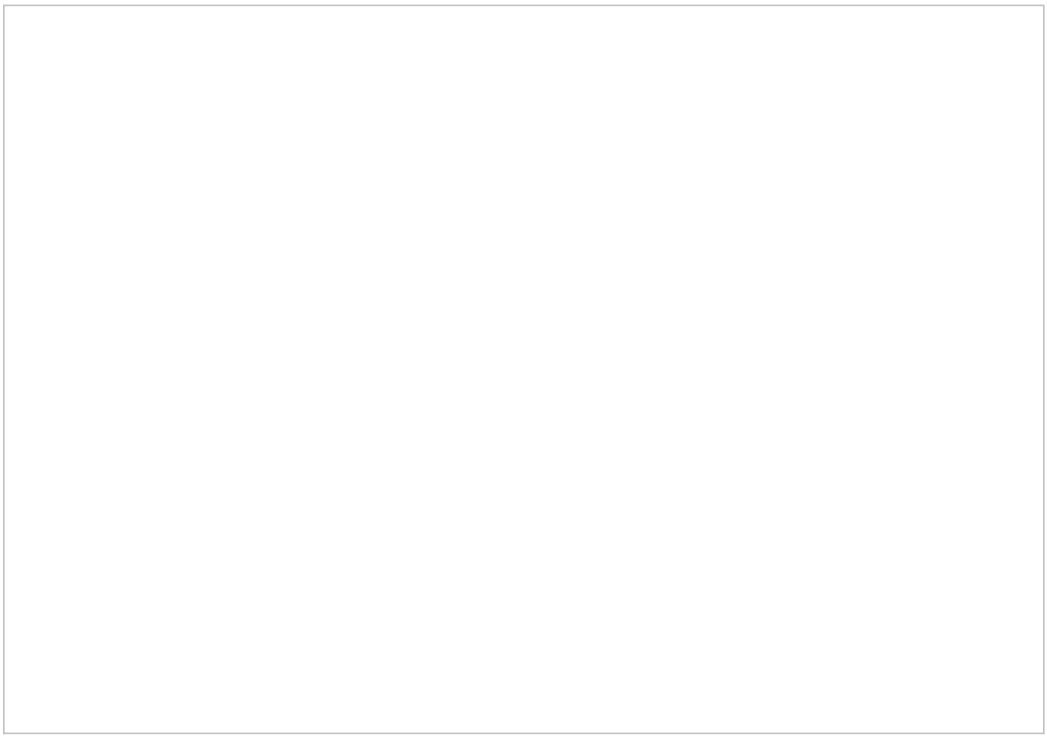
After creating your call list, you will need to associate it with a campaign. This can be done in section Lists by clicking **add** in the *Campaigns* setting.



A call list connected to a campaign

Step 3: Create Custom Activity History Fields

Next, you will need to create custom Activity History fields. This is done in section Custom Fields > Activity History. **Note**: When configuring your custom fields, make sure to mark them as searchable, otherwise they will not show up in a search.



Create custom Activity History fields

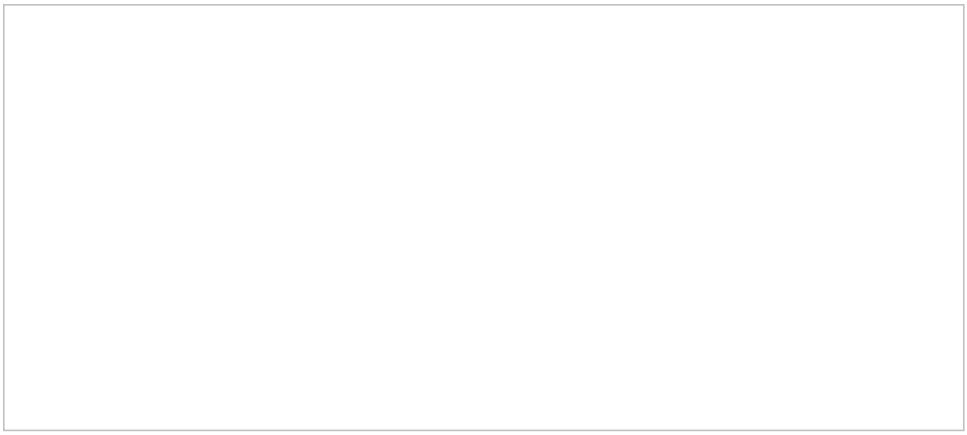
Step 4: Create an Activity Form Containing the Custom Activity History Fields

Next, you will need to create an activity form that includes the custom Activity History fields. To do this, add a control to a form that contains the data field configuration option (e.g., text, phone number, checkbox, etc.). From the data field, you can select the custom Activity History field; taking this action maps the custom Activity History fields to the activity form fields the agents will work with.

Add the custom Activity History fields to the form

Step 5: Define Search Grid Columns

Back in section Forms > Activity, you will need to configure "Search grid columns"; this setting is where you define what activity form fields are searchable when the activity form pops. Additionally, you may choose how the search results are displayed (e.g., ascending, descending, etc.).

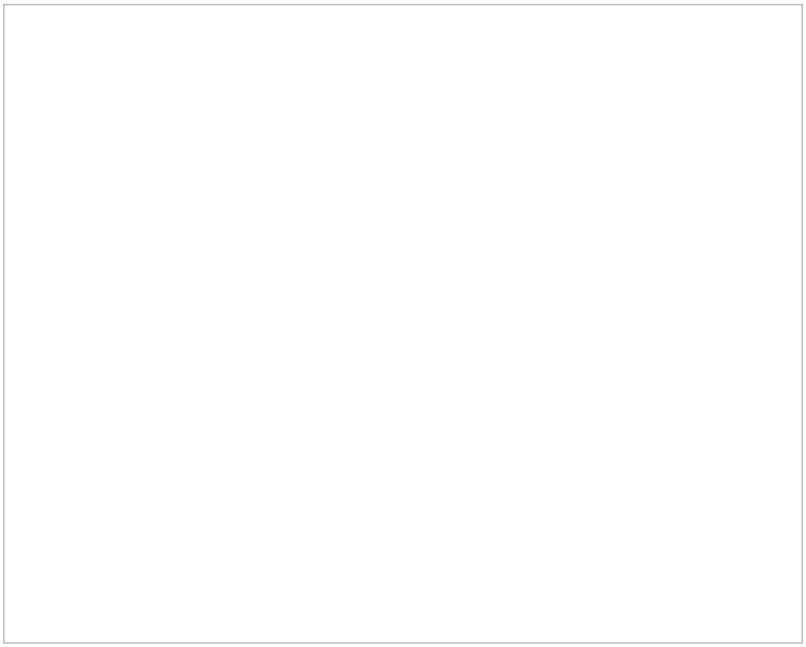


Configuring "Search grid columns"

Step 6: Enable Screenpop for the Activity Form

In section Services & Campaigns > Activity tab, you will need to configure the setting "Enable screenpop activity form". Click the **add/edit** button to select the activity form you created. This setting allows the form you created to pop to the agent during an interaction.

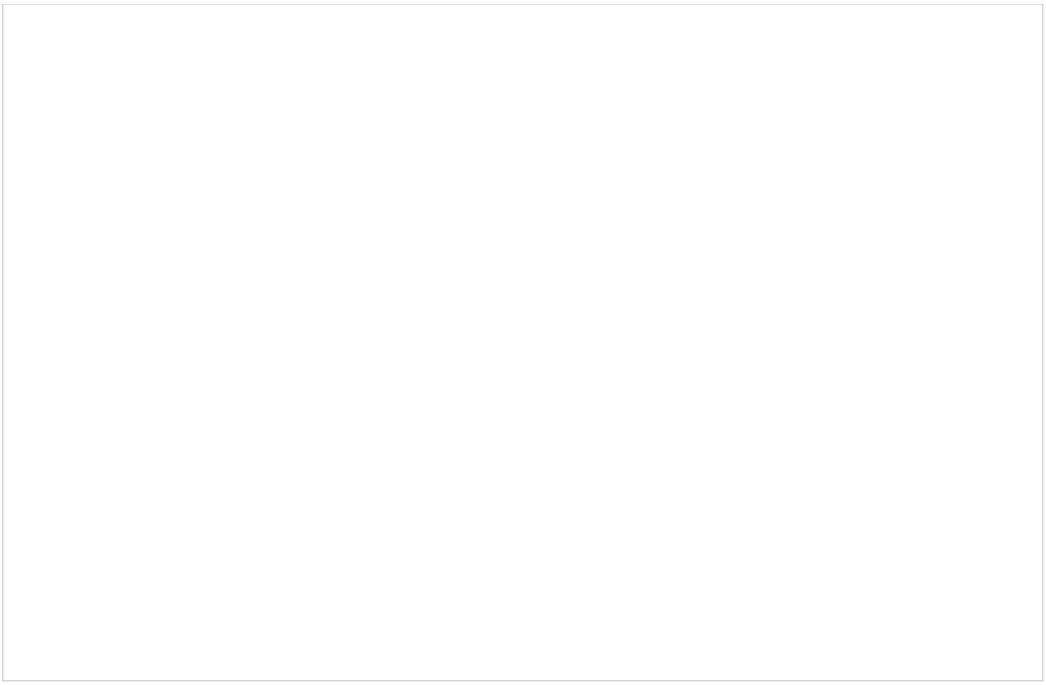
As a reminder, the voice scenario associated with this campaign must contain the Web Screen Pop block in order for the activity form to pop to the agent.



Enable screenpop for the activity form

Step 7: Map the Custom Activity History Fields to the Call List Fields

The final step in the procedure is the most important: connect the call list fields to the custom Activity History fields. Also located in section Services & Campaigns > Activity tab, you will configure the setting "Pre-fill activity history custom fields from the following lists". Clicking the **Edit** button opens a menu where you can map the call list columns to the custom Activity History fields.



Map the form fields to the call list fields

Address1 Postal Addresses

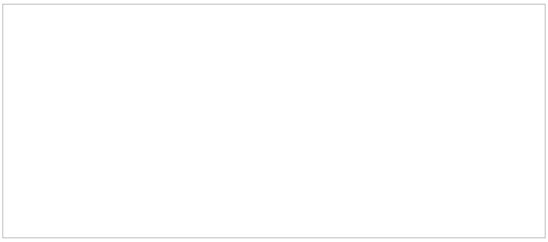
The Address1 Postal Addresses component is a set of postal address fields, including fields for address, city, state, zip code, and additional addresses. The component is outlined in red on the example form shown.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.

Address1 Postal Addresses component in Configuration mode

All Email Addresses

The *All Email Addresses* control places an email selector on a form, enabling a user to select from and include multiple types of email addresses (e.g., "primary" or "business"). In Preview mode, this control appears as shown.



All Email Addresses on a form

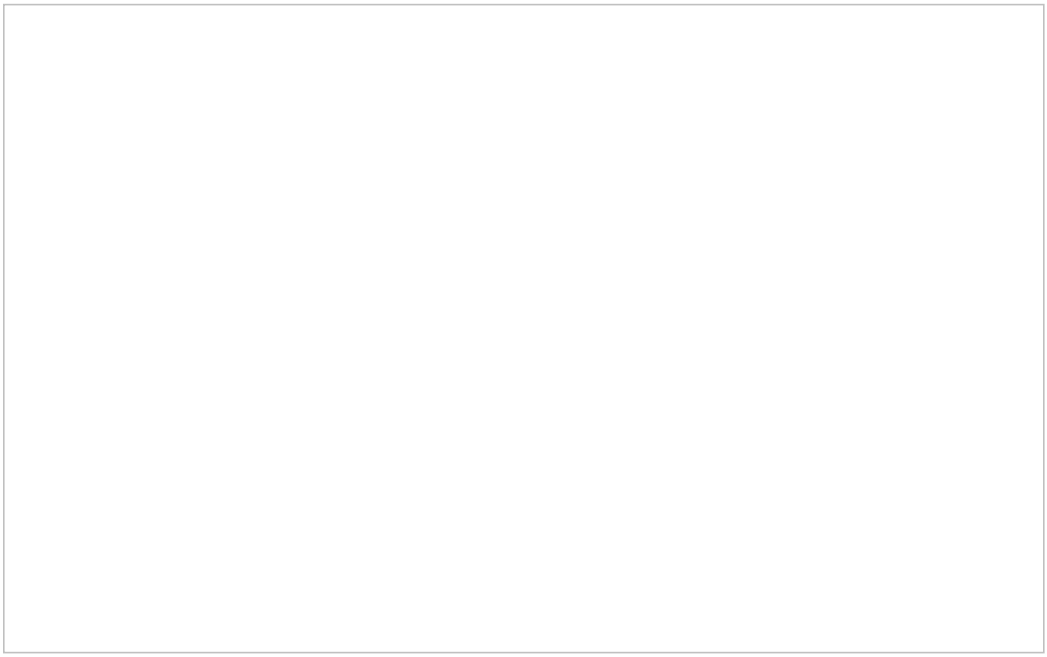
Field Properties

Once you have placed the control onto your form canvas, you can edit the field properties by clicking the pencil icon on the component. The field properties are described as follows.

All Email Addresses properties

Edit Mode Style

Edit Mode Style is the common property that allows you to select, edit, or add a style for this form control. For example, you may select "Hyperlink" from the selector, and click **Add / Edit** to change the style (e.g., text, font, color, etc.) of the email address hyperlink.



Add / Edit style

Label

Label is the name of this control that will be displayed on the form (e.g., "Your email addresses").

Hint text for empty field

This text input field is where you enter any text that you wish to display in this control's empty fields. The hint text indicates to the user what kind of text belongs in this field (e.g., "business email address").

Data field

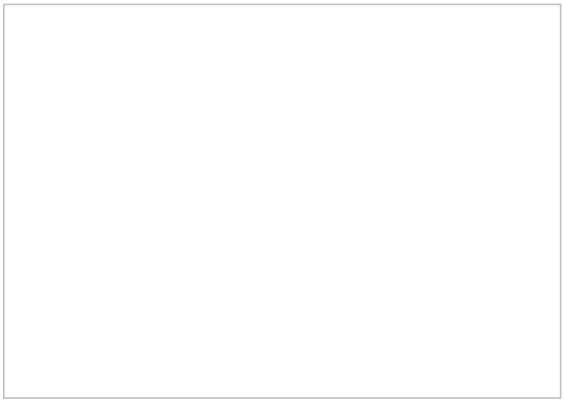
The *data field* is read-only, displaying the variable *$(Contact.emails)*, which gets and inserts the specified contact email addresses.

Options

- **Editable** - Select this checkbox to allow users to edit these email address types.
- **Required** - Select this checkbox to require users to enter email addresses in these fields. Note that *Required* is enabled only if the field is editable.
- **Validate** - Select this checkbox to allow the emails entered to be validated. Note that *Validate value* is enabled only if the field is editable.

All Phone Numbers

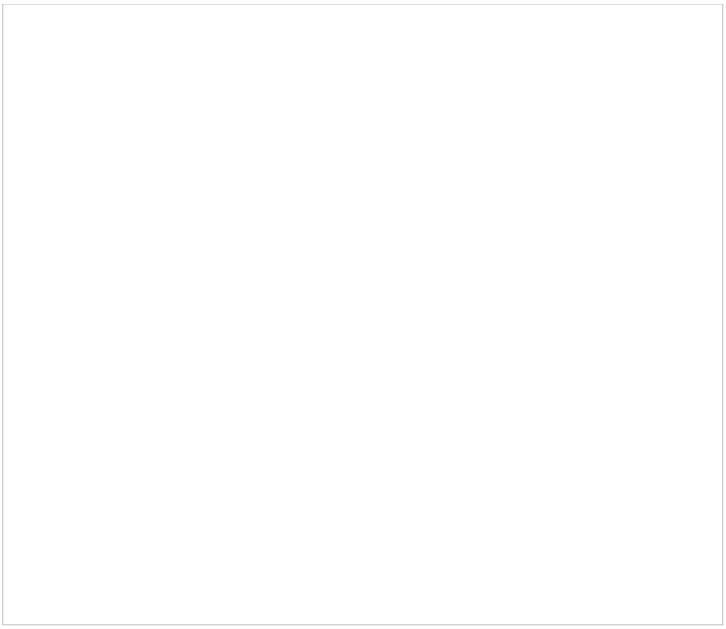
The *All Phone Numbers* control places a phone number selector on a form, enabling a user to select from and include multiple phone numbers (e.g., "home" or "mobile"). In Preview mode, this control appears as shown.



All Phone Numbers on a form

Field Properties

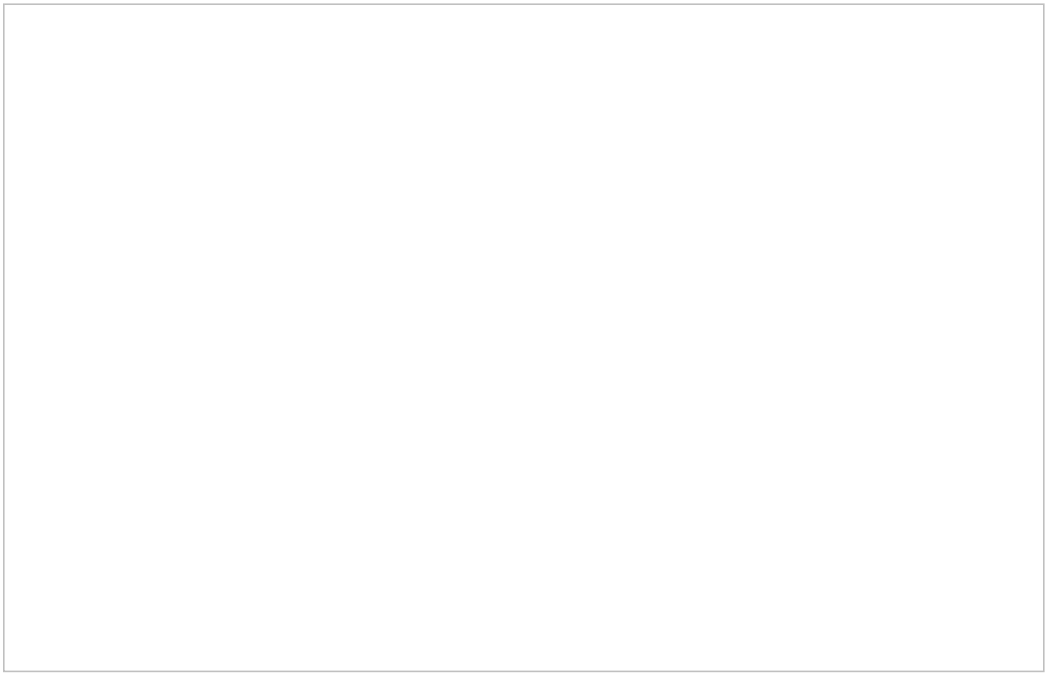
Once you have placed the control onto your form canvas, you can edit the field properties by clicking the pencil icon on the component. The field properties are described as follows.



All Phone Numbers properties

Edit Mode Style

Edit Mode Style is the common property that allows you to select, edit, or add a style for this form control. For example, you may select "Text" from the selector, and click **Add / Edit** to change the style (e.g., text, font, color, etc.) of the phone numbers displayed on the form.



Add / Edit style

Label

Label is the name of this control that will be displayed on the form (e.g., "Your phone number").

Hint text for empty field

This text input field is where you enter any text that you wish to display in this control's empty fields. The hint text indicates to the user what kind of text belongs in this field (e.g., "work number").

Data field

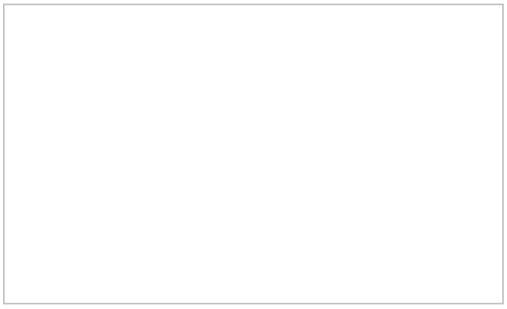
The *data field* is read-only, displaying the variable *$(Contact.phones)*, which gets and inserts the specified contact phone numbers.

Options

- **Editable** - Select this checkbox to allow users to edit these phone number types.
- **Required** - Select this checkbox to require users to enter phone numbers in these fields. Note that *Required* is enabled only if the field is editable.
- **Validate** - Select this checkbox to allow the phone numbers entered to be validated. Note that *Validate value* is enabled only if the field is editable.

All Postal Addresses

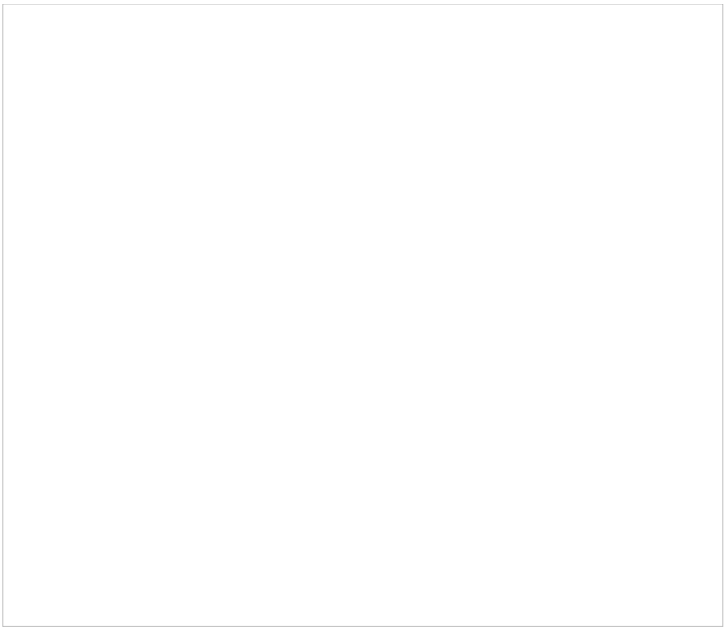
The *All Postal Addresses* control places an address selector on a form, enabling a user to select from and include postal addresses (e.g., "home" or "business"). In Preview mode, this control appears as shown.



All Postal Addresses on a form

Field Properties

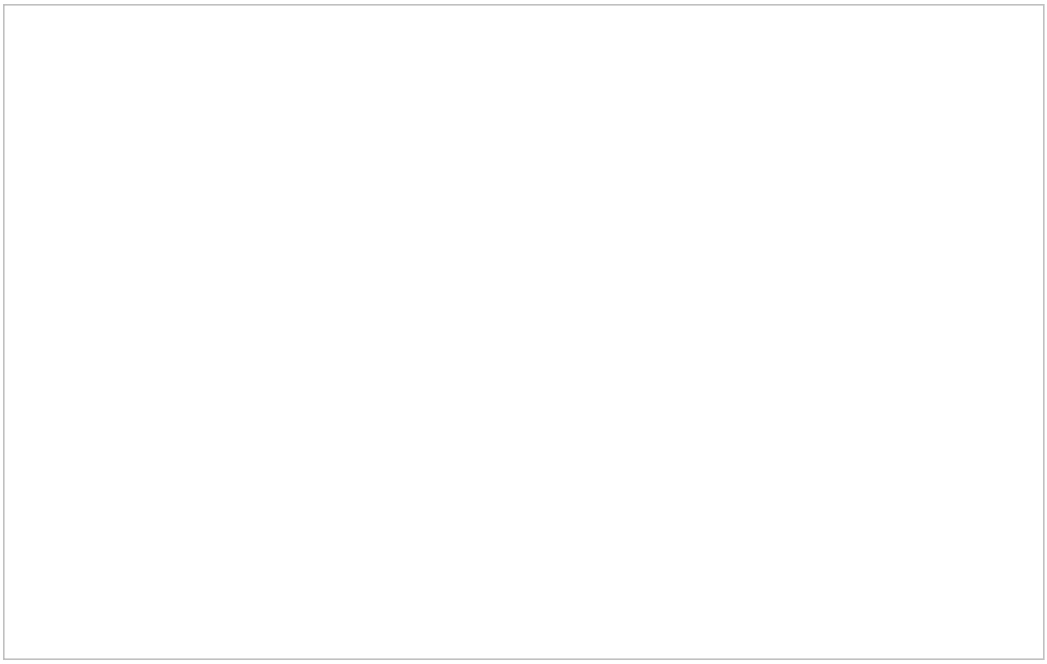
Once you have placed the control onto your form canvas, you can edit the field properties by clicking the pencil icon on the component. The field properties are described as follows.



All Postal Addresses properties

Edit Mode Style

Edit Mode Style is the common property that allows you to select, edit, or add a style for this form control. For example, you may select "Text" from the selector, and click **Add / Edit** to change the style (e.g., text, font, color, etc.) of the addresses displayed on the form.



Add / Edit style

Label

Label is the name of this control that will be displayed on the form (e.g., "Your address").

Hint text for empty field

This text input field is where you enter any text that you wish to display in this control's empty fields. The hint text indicates to the user what kind of text belongs in this field (e.g., "home").

Data field

The *data field* is read-only, displaying the variable *$(Contact.addresses)*, which gets and inserts the specified contact addresses.

Options

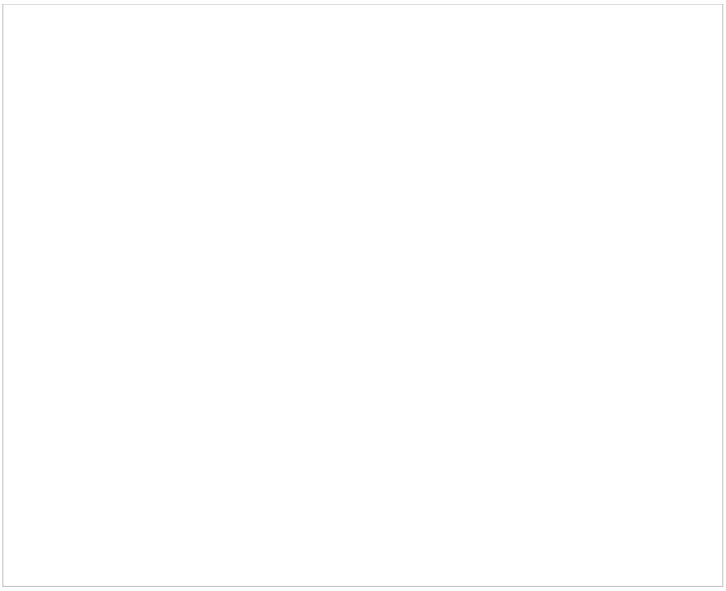
- **Editable** - Select this checkbox to allow users to edit these phone number types.
- **Required** - Select this checkbox to require users to enter phone numbers in these fields. Note that *Required* is enabled only if the field is editable.
- **Validate** - Select this checkbox to allow the phone numbers entered to be validated. Note that *Validate value* is enabled only if the field is editable.

Button

Dragging the Button form control onto the form canvas adds a new button field to your form. As with the other form controls, you may customize the style, appearance, and functionality of this control by editing its field properties.

Button Field Properties

Click the pencil icon to edit Button field properties and specify style, label, size, alignment, conditions, and actions. This section describes the field properties that you can edit for the Button control.



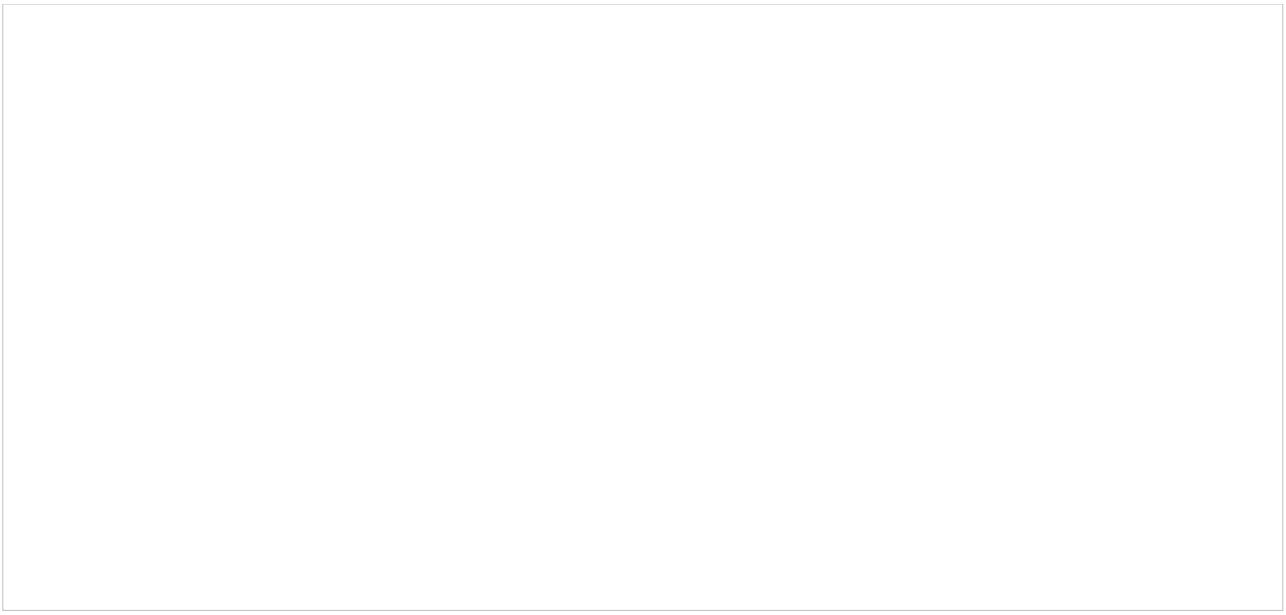
Button Field Properties

Dock to main window

Click this button to dock the field properties on the form canvas at all times, rather than show the properties in a pop-up dialog.

Dock to Main Window button

Docking is convenient when you wish to edit properties and preview the form at the same time.



Button properties docked to main window of form canvas

Edit Mode Style

Edit Mode Style presents a list of common styles from which to choose:

- None
- Text
- Title
- Label
- Hyperlink
- Note

Clicking **Add / Edit** brings up the Edit Style dialog, where you specify the appearance of the control.

Add / Edit style

Label

Label is the text that will be shown on the button (e.g., "Buy Now" or "Send").

Width, px

Width, px is the label width (optional). If no width is specified, the button defaults to the entire column width.

Alignment

Alignment provides three alignment choices for the button:

- Left (default)
- Right
- Center

Condition

You can determine what kind of condition must be met in order for the button to perform a specific action (see the Action properties below). Click **Add / Edit** to add a condition or change one that's already been added.

The *Edit Conditions* dialog pops up, providing the following fields to complete:

- **$()** - Either enter a variable (if you know it), or click this button to select and map a variable to the condition.
- **is / is not** - Select either **is** or **is not** as part of the condition string
- **Selector** - Select from one of the following:**empty**, **one of:**, **<**, **>**, **=**
- **Text field** - Enter the word(s) or values that should be a part of the condition.

Click "Add / Edit" to add or change conditions for the button

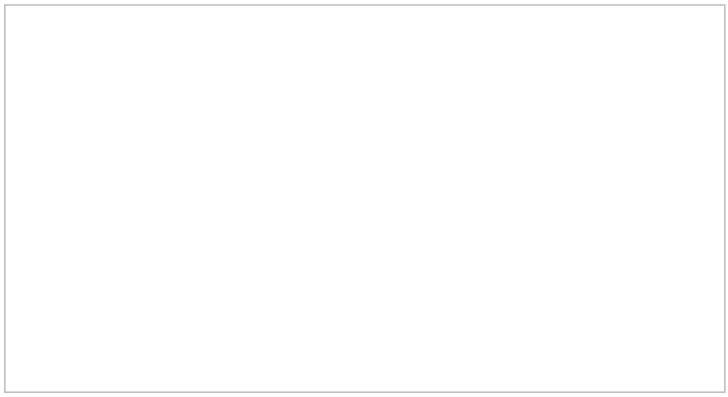
After you have made your selections, the condition statement should look something like *$(ActivityHistory.media_type) is chat*, which means that the activity history media type must be chat in order for the button to perform the action.

Other available buttons include:

- **Delete** - Click to delete the condition statement
- **Add** - Click to add another condition statement with different variables and selections
- **OK** - Click to save the condition
- **Cancel** - Click to cancel adding or editing

Action

Action is a drop-down menu offering the following possible actions that this button can provide.



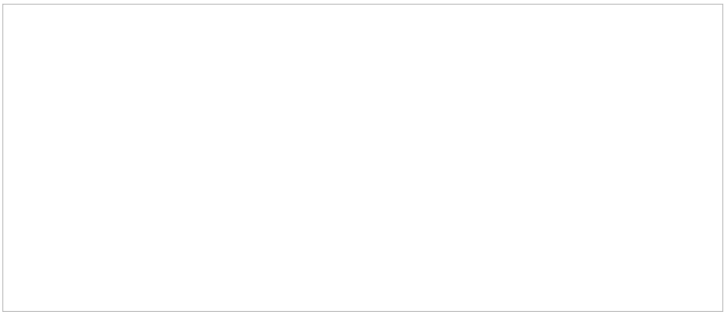
Action selection

Do Nothing

Select *Do Nothing* if this button should not provide any action. When the user clicks this button on the form, nothing will happen.

Call number

Call number initiates a phone call.



Call number

Upon selecting this action, the following additional properties are available:

- **Number to call** – Enter the phone number to be dialed.
- **Required during a call, to consult** - When this checkbox is selected, a transfer of the call must be attempted. If no transfer attempt is made, when the agent attempts to hang up, the form reverts to the initial form page with the unselected call button and outputs a warning with two additional button options: "The form requires consult transfer attempts made during the call **[Cancel]** or **[Force Hang up]**." If the agent attempts a transfer and the person does not answer, the form can be configured to allow the agent to take a message that can be subsequently emailed or sent via SMS/text. To configure these options, see Start SMS and Create Email.
- **Validation URL** – Enter the validation URL.

Start SMS

Start SMS initiates an SMS/text message to be sent to the specified phone number.

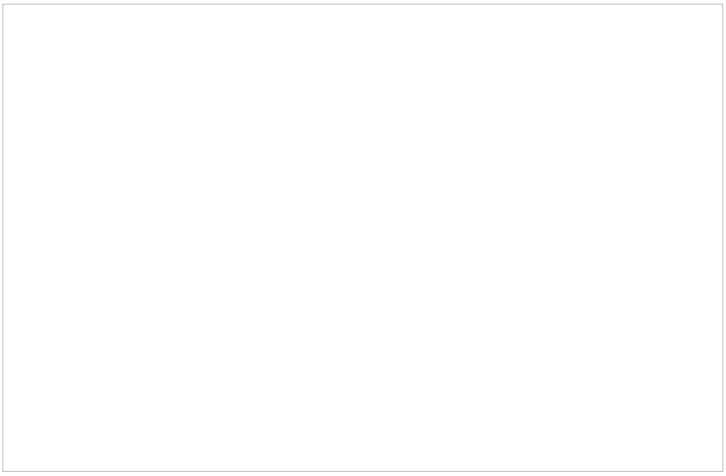
Start SMS

Upon selecting this action, the following additional properties are available:

- **Phone Number** - The phone number that will receive the SMS
- **Message** - Enter the desired text message to be sent

Create Email

Create Email initiates a new email message to be sent to the specified email address.



Create email

Upon selecting this action, the following additional properties are available:

- **Email Address** - The recipient's email address
- **Subject** - The subject line of the email
- **CC** - The email addresses of the recipients to be copied on the email
- **BCC** - The email addresses of the recipients to be blind-copied on the email
- **Body** - The text of the email

Disposition

Disposition enters a fixed disposition for the current call or interaction.

Disposition

Upon selecting this action, the following additional properties are available:

- **Disposition** – Type the disposition name, if known
- **Select Disposition** – When this button is clicked, a pop-up dialog shows the following properties:
  - **Disposition from service –** A drop-down menu shows the services available for your contact center. Selecting one of the services brings up the dispositions that can be selected. See *Select Disposition* below.
  - **Select Disposition** – A drop-down menu shows the dispositions available for the selected service.

- **Two Step Disposition** - Selecting this checkbox enables dispositions to be set in two steps
- **Validation URL** - Enter the validation URL.

Go To Page

Go To Page navigates to other pages in a multi-page form.

Go to Page

Upon selecting this action, the following additional properties are available:

- **Destination page** – A drop-down menu lists the possible destination pages on the form

Augmentation

Augmentation runs a contact search in augmentation databases that have been configured for your contact center. There are no additional properties for this action.

Complete

The *Complete* action completes the interaction. Upon selecting this action, the following additional properties are available:

- **Validation URL** - Enter the validation URL.

Search Knowledge Base

Search Knowledge Base brings up the Knowledge Base search field.

Search Knowledge Base

Upon selecting this action, the following additional properties are available:

- **Text to search for** - Enter the words to look up in Knowledge Base. Note that you can add variables to the search terms including those from custom fields, such as Activity History. For example, if a Knowledge Base article is used in an activity form, the blank, Knowledge Base-associated fields can be configured to prefill with values from activity history custom form fields. If an activity history field variable is not present in an activity form, it is not prefilled. Additionally, if a value is not set for the Knowledge Base article, the field does not prefill the form. If an agent has put some value in a field already, it is not prefilled (it will only prefill when empty).

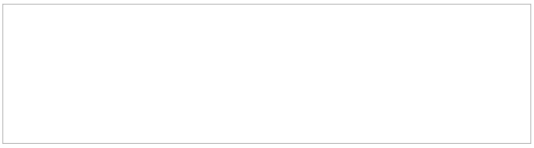
Call Number

The Call Number component is a button which, when clicked, will initiate a call to the specified number.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.

Checkbox

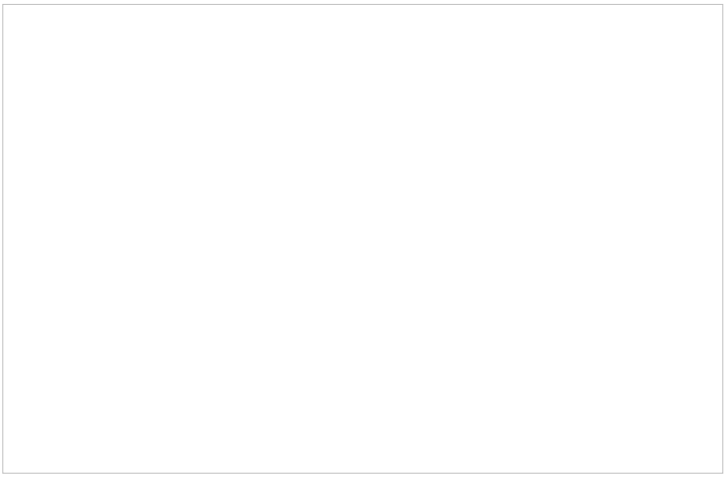
This control places a checkbox on a form, enabling a user to check a specific item on a form. In Preview mode, this control appears as shown.



Checkbox on a form

Field Properties

Once you have placed the control onto your form canvas, you can edit the field properties by clicking the pencil icon on the component. The field properties are described as follows.



Checkbox properties

Edit Mode Style

Edit Mode Style is the common property that allows you to select, edit, or add a style for this form control. For example, you may select "Hyperlink" from the selector, and click **Add / Edit** to change the style (e.g., text, font, color, etc.) of the email address hyperlink.

Add / Edit style

Label

Label is the name of this control that will be displayed on the form (e.g., "Subscribe" or "Receive updates").

Data field

In the *data field*, you can enter a variable or select from and insert a variable into this field.

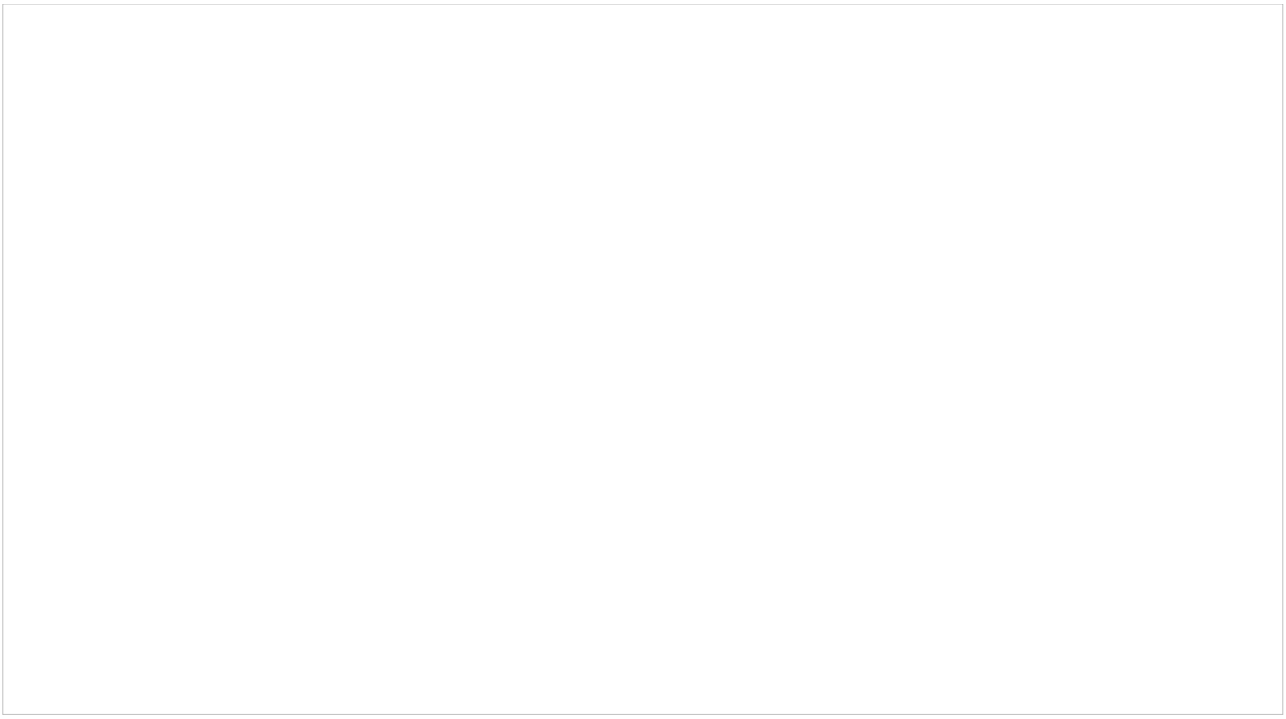
Options

- **Editable** - Select this checkbox to allow editing.

Company Text

The Company Text component is the field for adding a company's name in a business address.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.

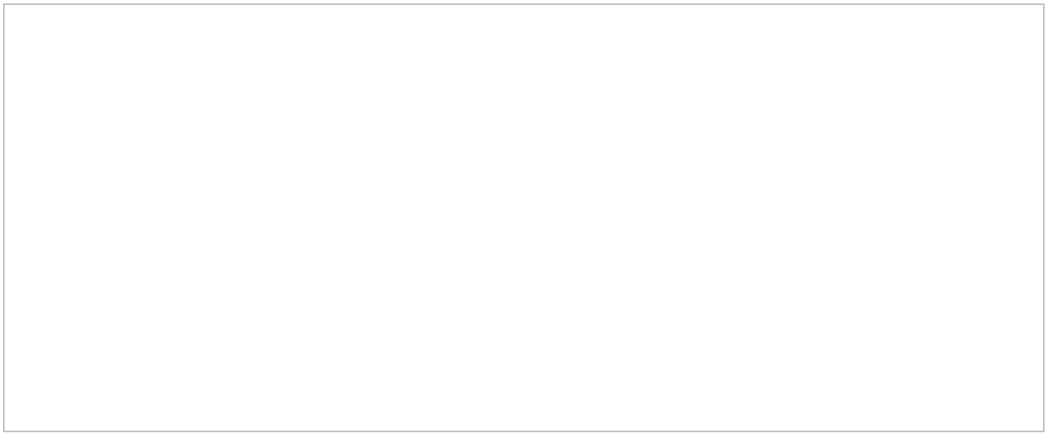


Company Text component in Configuration mode

Complete System

The Complete System component is a button that duplicates the function of the **Complete** button of the Agent Desktop application. For more information, see section How to Wrap Up After-Call Work of the *Agent Guide*. A form can have only one component of this type.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.

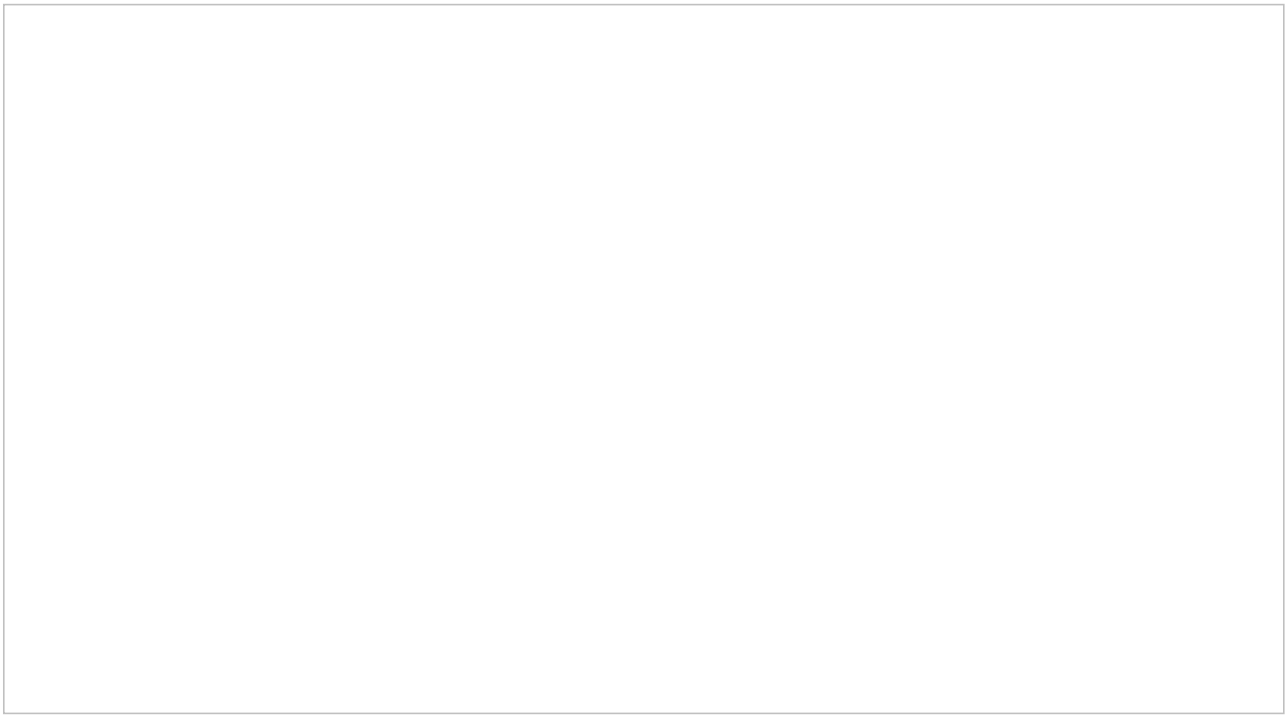


Complete System button component in Preview mode

Contact Source

Contact Source is a special type of control that displays an icon if the contact was imported from an external CRM, such as Salesforce.com. In the example form shown, the Contact Source control displays the Salesforce icon and is outlined in red.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.



Contact Source component in Configuration mode

Date Time

The *Date/Time* control places a date and time field on a form. In Preview mode, this control appears as shown.

Date/Time on a form

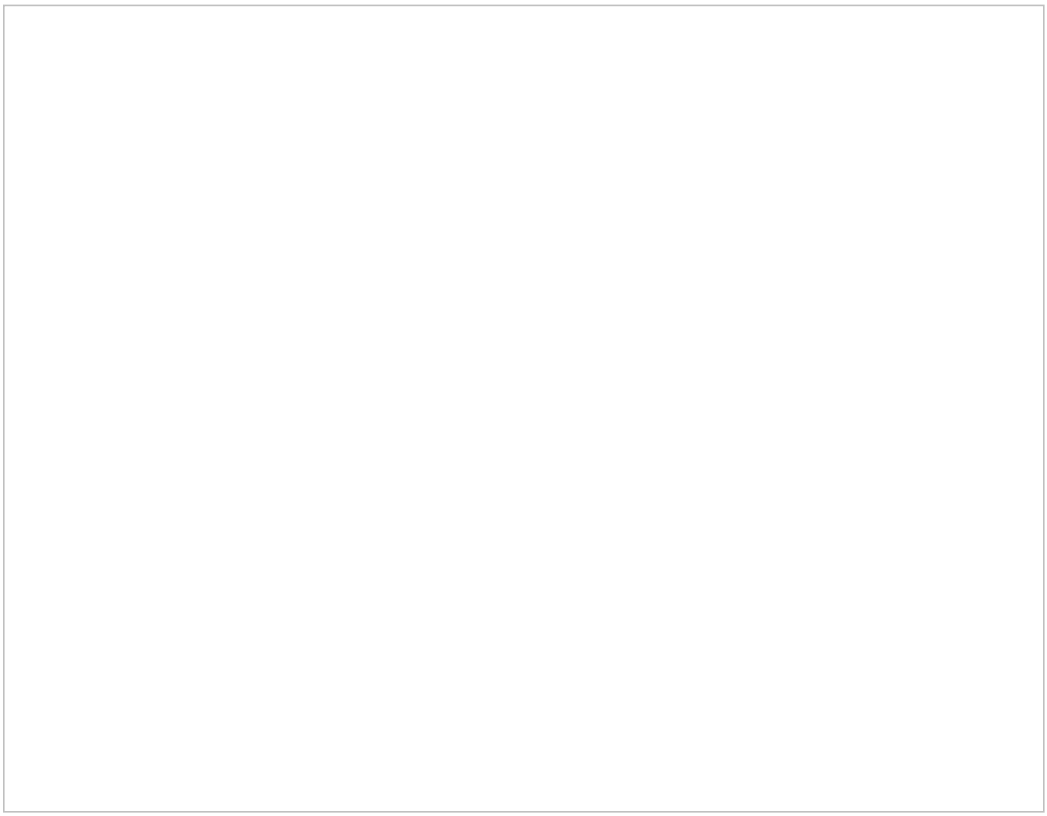
Field Properties

Once you have placed the control onto your form canvas, you can edit the field properties by clicking the pencil icon on the component. The field properties are described as follows.

Date/Time properties

Edit Mode Style

Edit Mode Style is the common property that allows you to select, edit, or add a style for this form control. For example, you may select "Text" from the selector, and click **Add / Edit** to change the style (e.g., text, font, color, etc.) of the date and time field displayed on the form.



Add / Edit style

Label

Label is the name of this control that will be displayed on the form (e.g., "Today's date").

Hint text for empty field

This text input field is where you enter any text that you wish to display in this control's empty fields. The hint text indicates to the user what kind of text belongs in this field (e.g., "dd/mm/yyyy").

Data field

The *data field* is where you enter a specific variable or select a variable to get and insert data into the Date/Time field.

Options

Editable

Select this checkbox to allow users to edit these phone number types.

Required

Select this checkbox to require users to enter phone numbers in these fields. Note that*Required* is enabled only if the field is editable.

Display As

From the drop-down list, select one of the following display types:

- Date
- Time
- Date and Time
- Custom

Display format

When you select a *Display As* type, the *Display Format* automatically changes to match your selection. For example, the Time display type is down with "hh:mm a" as its display format.

The display formats correspond to the display types:

- **Date** - MM/dd/yyyy
- **Time** - hh:mm a
- **Date and Time** - hh:mm a MM/dd/yyyy
- **Custom** - This starts with “hh:mm a MM/dd/yyyy” as a default value and remembers what is changed by the user.

Initial value

You can indicate the initial value to be shown on the Date/Time control. This is optional.

Custom reporting field

The *Custom reporting field* is the custom reporting field created for your contact center (if any). Such a field is unique to your contact center, as it is different from any default fields. If you do not have any custom reporting fields, select **None** from the drop-down list.

Export in campaign results

Select this checkbox to export the data collected in the Date/Time field in your call center's campaign results.

Position in campaign results

Indicate the desired position (e.g., "1") for the data collected in the Date/Time field to be placed in campaign results.

Disposition Button

The Disposition Button component is a button, which, when clicked, will finish the interaction processing and insert the specified disposition into the call results. Note that if this button is pressed during a live call, the call will be released.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.

Disposition System

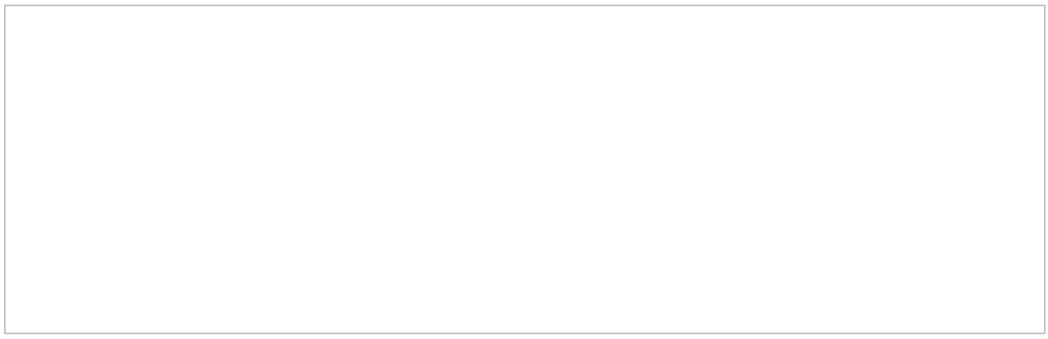
The Disposition System component is a drop-down menu that duplicates the function of the Disposition Selector of the Agent Desktop application. For more information, see section How to Enter Dispositions and Notes of the *Agent Guide*. A form can have only one component of this type and it will have the same disposition set as the Disposition Selector of the Agent Desktop (i.e., the disposition set configured for the service/campaign associated with the given interaction).

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.

Email

The *Email* component adds a field for entering an email address on an activity form during interaction handling.

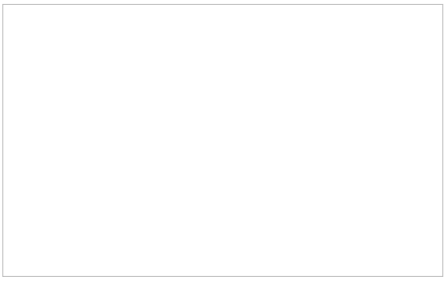
Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.



The Email component shown in Configuration mode

Email Address

The *Email Address* control places an email selector on a form, enabling a user to select from and include multiple types of email addresses (e.g., "primary" or "business"). In Preview mode, this control appears as shown.



Email Address field shown on a form

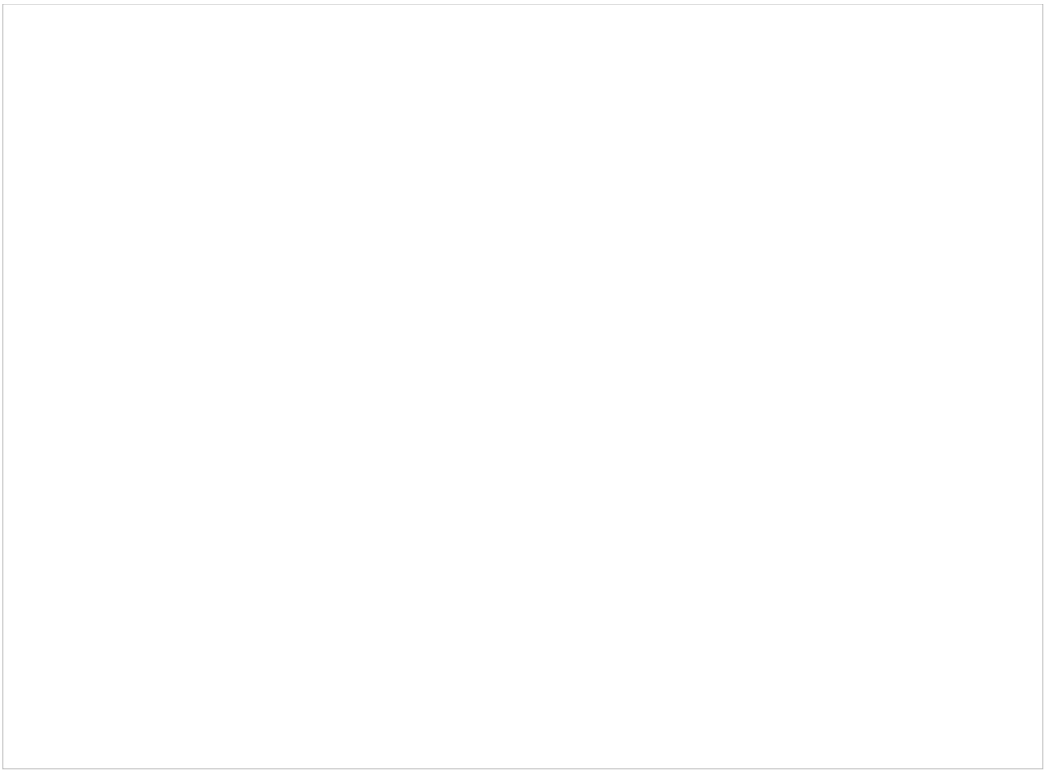
Field Properties

Once you have placed the control onto your form canvas, you can edit the field properties by clicking the pencil icon on the component. The field properties are described as follows.

Email Address properties

Edit Mode Style

Edit Mode Style is the common property that allows you to select, edit, or add a style for this form control. For example, you may select "Hyperlink" from the selector, and click **Add / Edit** to change the style (e.g., text, font, color, etc.) of the email address hyperlink.



Add / Edit style

Label

Label is the name of this control that will be displayed on the form (e.g., "Primary email address").

Hint text for empty field

This text input field is where you enter any text that you wish to display in this control's empty fields. The hint text indicates to the user what kind of text belongs in this field (e.g., "xxxxxx@xxxx.xxx").

Data field

The *data field* is read-only, displaying the variable *$(Contact.emails)*, which gets and inserts the specified contact email addresses.

Options

Editable

Select this checkbox to allow users to edit the field.

Required

Select this checkbox to require users to enter an email address in this field. Note that *Required* is enabled only if the field is editable.

Hide if read-only and empty

Select this checkbox to hide the Email Address field if it's empty or marked as read-only.

Validate

Select this checkbox to validate that this is a valid email address.

Initial value

You can indicate the initial value to be shown in the Email Address field. This is optional.

Custom reporting field

The *Custom reporting field* is the custom reporting field created for your contact center (if any). Such a field is unique to your contact center, as it is different from any default fields. If you do not have any custom reporting fields, select **None** from the drop-down list.

Export in campaign results

Select this checkbox to export the data collected in the Email Address field in your call center's campaign results.

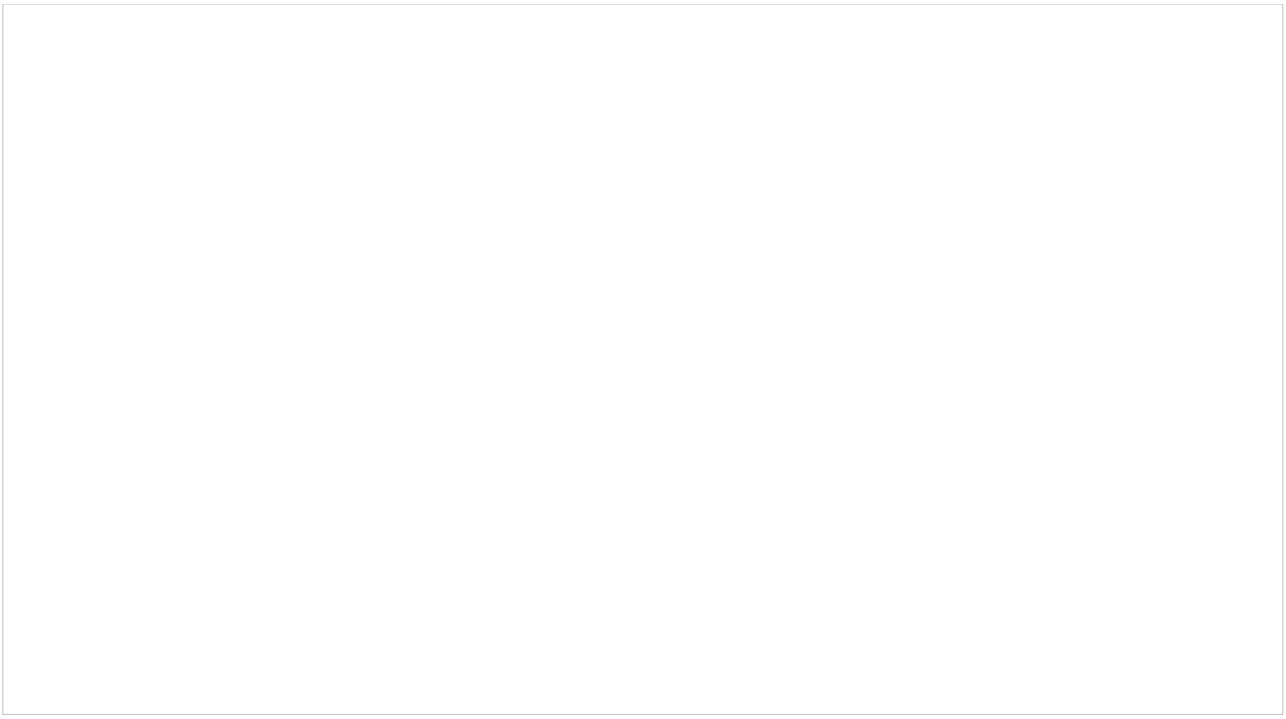
Position in campaign results

Indicate the desired position (e.g., "1") for the data collected in the Email Address field to be placed in campaign results.

Employees Text

Employees Text is the field for the number of employees at a company. The component is outlined in red on the example form shown.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.



Employees Text component in Configuration mode

Field

The Field component is a data field for entering information during interaction handling.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.

Fields Group

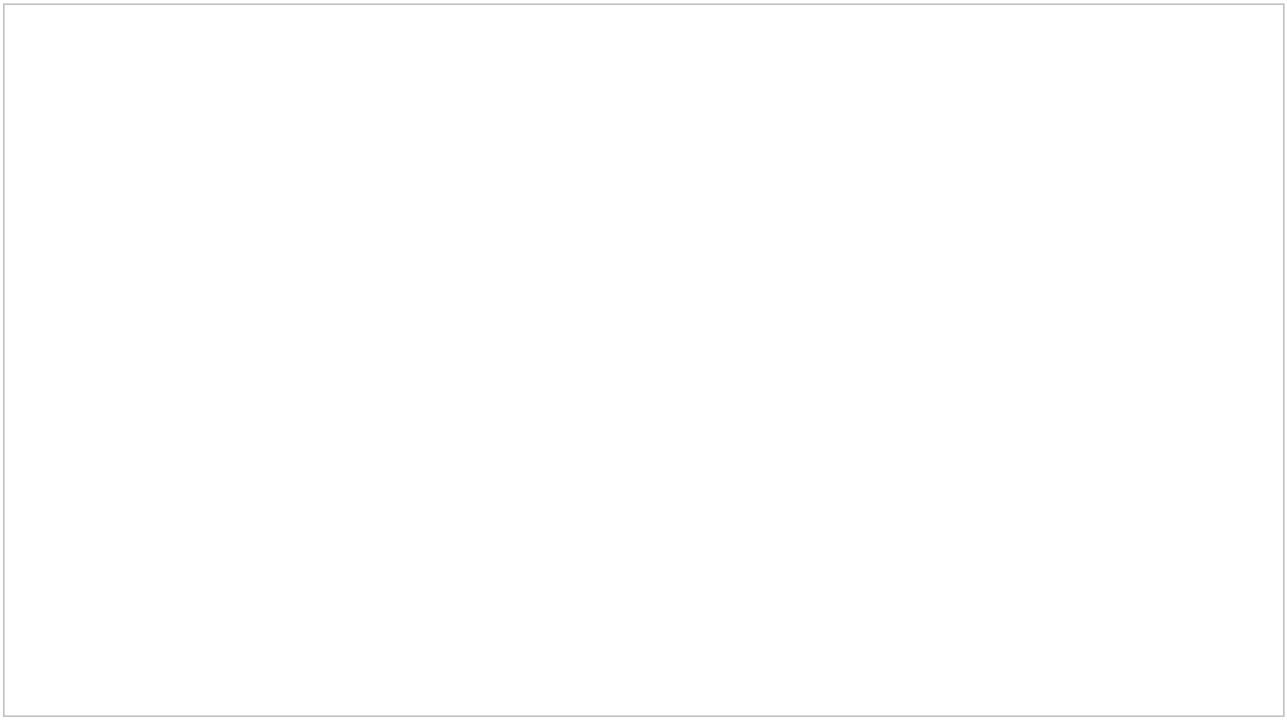
In Form Builder's Static Layout Editor view, multiple form fields may be selected and grouped in order to be moved together to a different location on the form. This functionality is similar to that of photo editing applications, in which you group multiple elements on a layer for easy placement onto a different part of the image canvas.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.

First Text

First Text is the field for adding a person's first name on a form. The component is outlined in red on the example form shown.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.



First Text component in Configuration mode

Goto Page

GoTo Page is essentially a button that directs a user to another page of a form. This component is useful only for multi-page forms.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.

Goto Page component in Configuration mode

Hyperlink

The Hyperlink component is used to add a URL to your form. When an agent clicks the hyperlink, the target web page opens in a separate browser tab/window.

To add this component to your activity form, hold and drag the component from the component menu on the left, onto the blank form on the right.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x.

Settings

The following settings can be specified for the Hyperlink component.

Style

Select or define the text style for this element. Choose from the following options:

- << None >>
- Text
- Title
- Label
- Hyperlink
- Note

Click **add/edit** to add more text styles or edit styles for this element. Changes that you make in this field are shown in the component's configuration.

Link text

Enter the text of the hyperlink to be displayed on the form.

Hyperlink URL

Hyperlink URL is the URL of the target web page that is supposed to open when the user clicks the hyperlink text.

Label

The Label component is used to add text to your form, such as headings, instructions, and help text. To add this component to your activity form, hold and drag the component from the component menu on the left, onto the blank form on the right.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x.

Settings

The following settings can be specified for the Label component.

Style

Select or define the text style for this element. Choose from the following options:

- << None >>
- Text
- Title
- Label
- Hyperlink
- Note

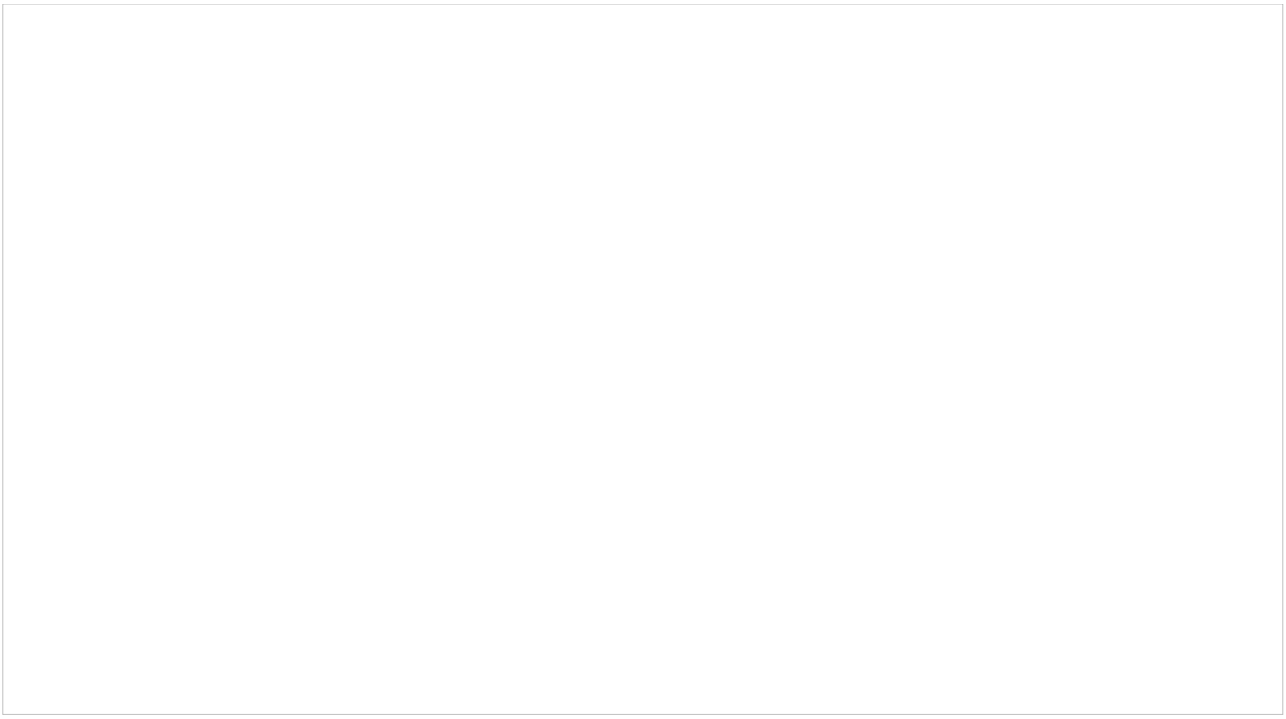
Value

Enter the text to be displayed. All or part of this text can be a scenario variable in the*$(varname)* format.

Last Text

Last Text is the field for adding a person's last name on a form. The component is outlined in red on the example form shown.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.



Last Text component in Configuration mode

List

The *List* control places a list on a form. In Preview mode, this control appears as shown.

List on a form

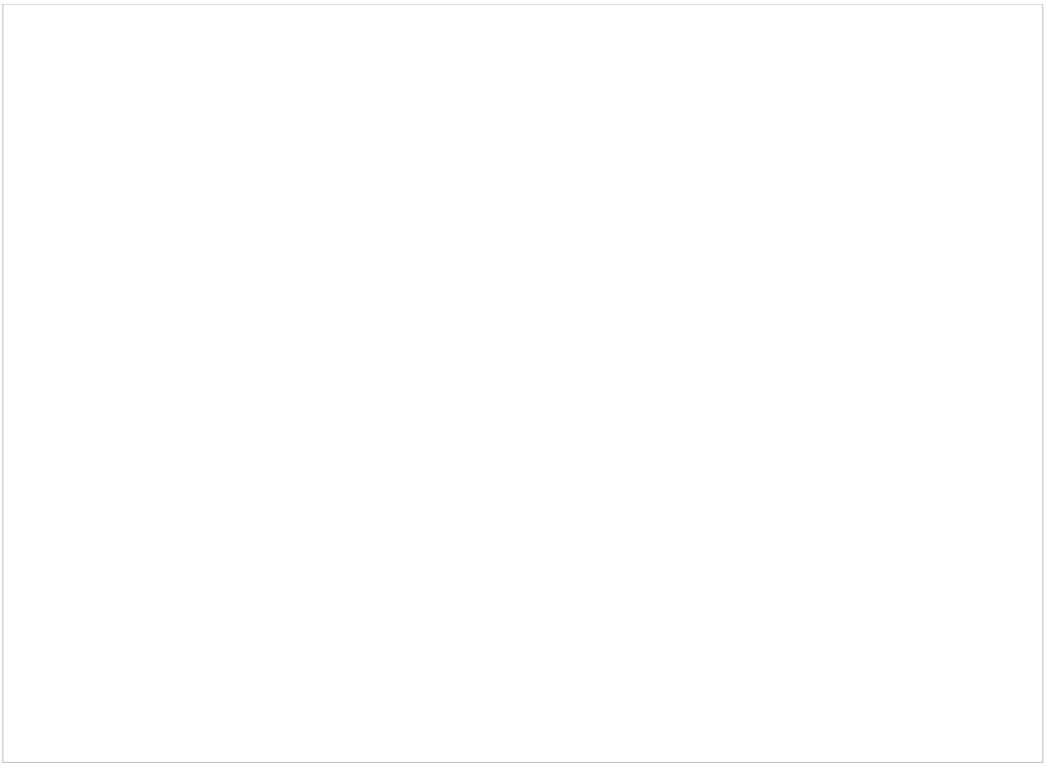
Field Properties

Once you have placed the control onto your form canvas, you can edit the field properties by clicking the pencil icon on the component. The field properties are described as follows.

List properties

Edit Mode Style

Edit Mode Style is the common property that allows you to select, edit, or add a style for this form control. For example, you may select "Text" from the selector, and click **Add / Edit** to change the style (e.g., text, font, color, etc.) of the list fields displayed on the form.



Add / Edit style

Label

Label is the name of this control that will be displayed on the form (e.g., "Reasons for return").

Hint text for empty field

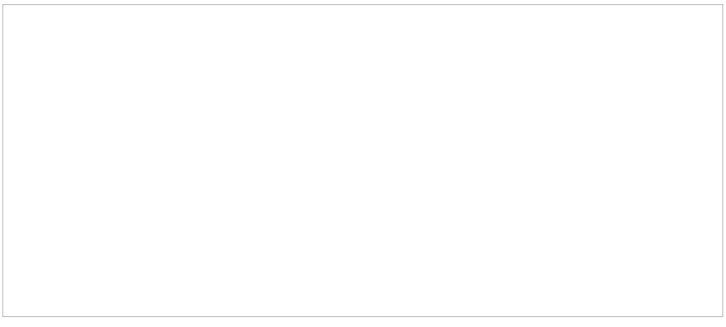
This text input field is where you enter any text that you wish to display in this control's empty fields. The hint text indicates to the user what kind of text belongs in this field (e.g., "Why return this item?").

Data field

The *data field* is where you enter a specific variable or select a variable to get and insert data into the List field.

Items

The items specified here are provided in the drop-down list on the form. Click **Edit List Items** to edit or add items to the list. The *Edit List Items* dialog pops up.



Edit list items

For each list item, enter the following:

- **Label** - The name of the list item (shown on the form)
- **Value** - The actual list item not shown in the list on the form

You can modify your list items by clicking the buttons **Add** and **Delete**. Be sure to click **OK** to save your changes.

Options

Editable

Select this checkbox to allow users to edit the list.

Required

Select this checkbox to require users to make a selection from the list. Note that*Required* is enabled only if the field is editable.

Initial value

You can indicate the initial value to be shown on the list. This is optional.

Custom reporting field

The *Custom reporting field* is the custom reporting field created for your contact center (if any). Such a field is unique to your contact center, as it is different from any default fields. If you do not have any custom reporting fields, select **None** from the drop-down list.

Export in campaign results

Select this checkbox to export the data collected in the list in your call center's campaign results.

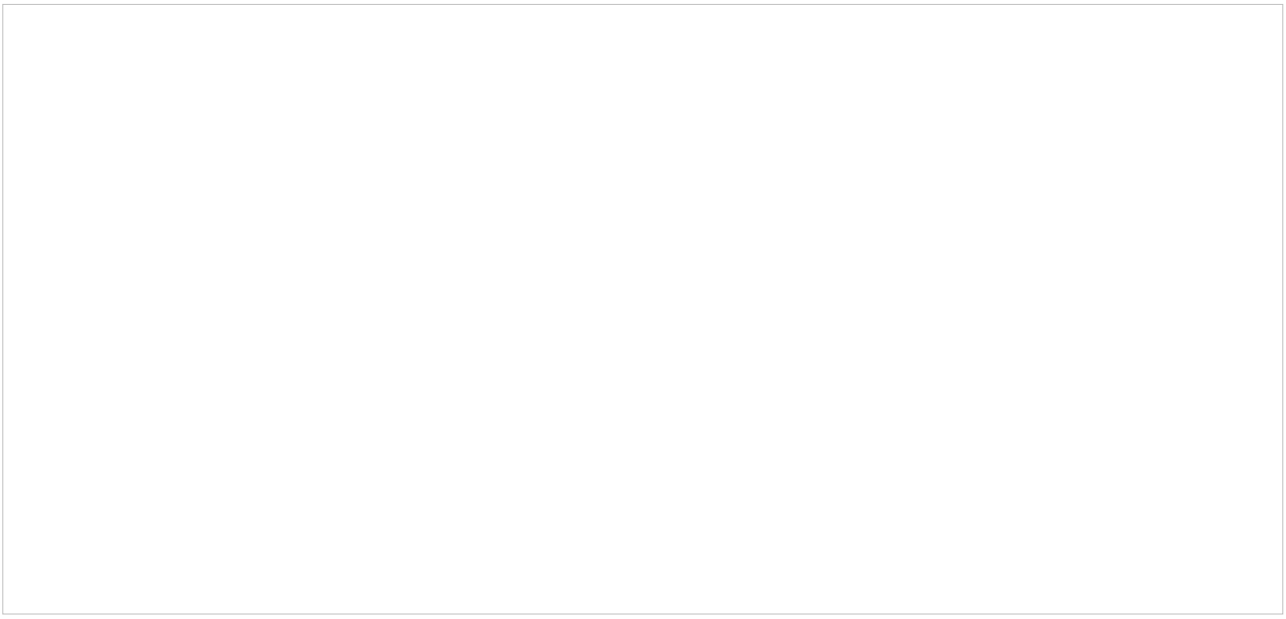
Position in campaign results

Indicate the desired position (e.g., "1") for the data collected in the list to be placed in campaign results.

Manual Augmentation System

The Manual Augmentation System component is a button that enables any form with contact fields to be augmented with more contact data. Note that this component only works if data augmentation is configured in your contact center's Integration Accounts with data providers such as The Data Group and Next Caller.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.

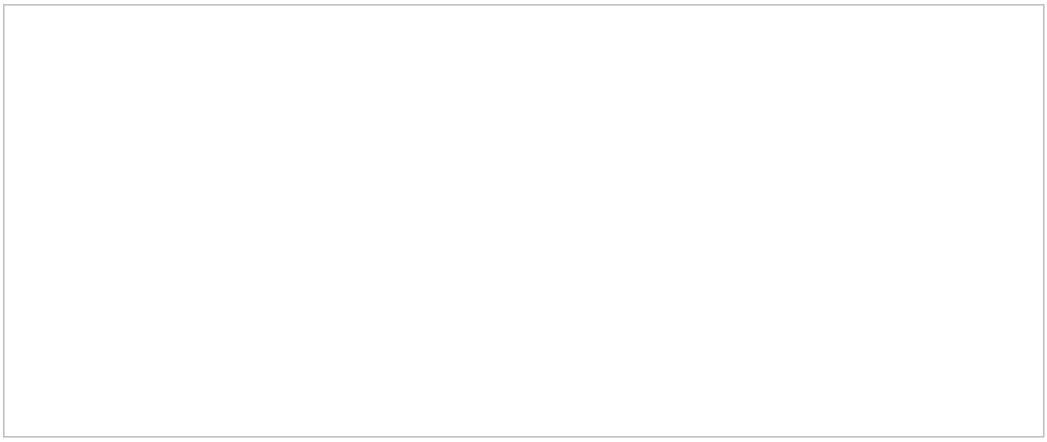


Manual Augmentation System component in Configuration mode

MediaPlayer URL

The MediaPlayer URL component is used to play the specified message to the agent.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.

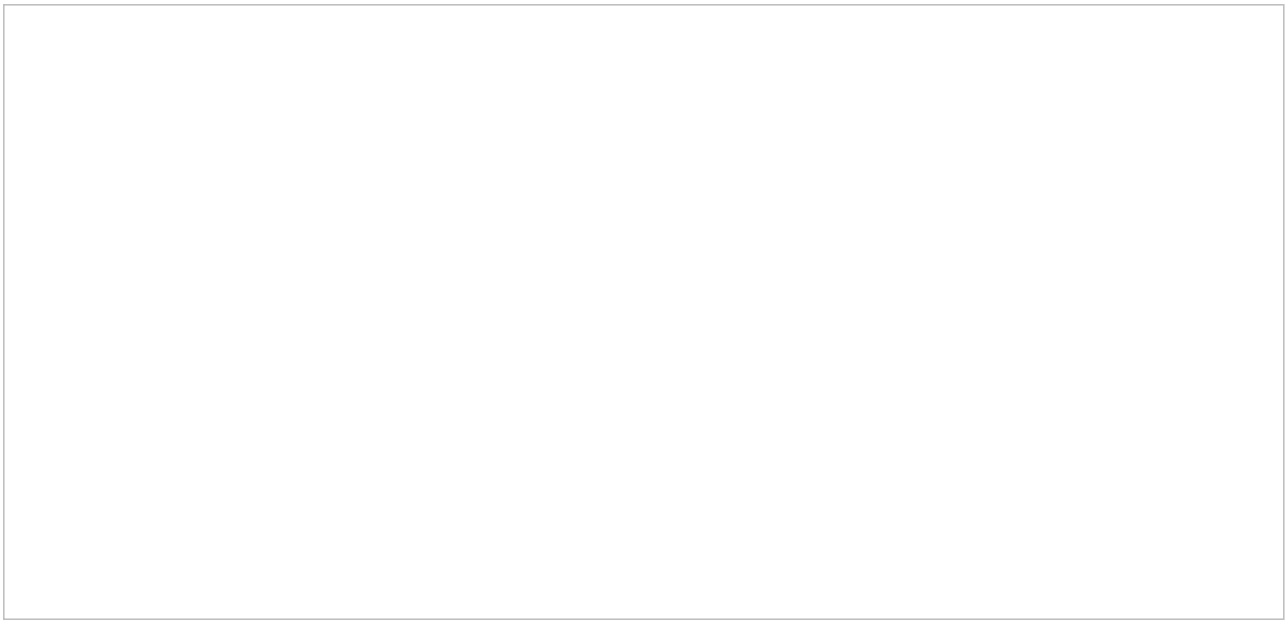


MediaPlayer URL component in Preview mode

Messenger

The Messenger component is a special type of control that displays an array of icons for messengers such as Facebook Messenger, LINE, Telegram, and Viber.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.



Messenger component in Configuration mode

Messengers

The Messengers control is just like the Messenger component (available in Static Layout Editor view), except instead of placing icons for social messengers such as Facebook Messenger, LINE, Telegram, and Viber, this control places only the messenger contact data on the form, sans the icons.

If messenger integrations have been configured for your contact center, the control will link to a saved messenger contact via the data field array *Contact.messengers*. Messenger integrations are configured in the Contact Center Administrator application, section Integration Accounts.

Field Properties

This component has just two properties: Data Field and Orientation. Only the Orientation property can be edited.

Messenger field properties

Data Field

The data field is a variable that gets and fills in messenger contact data on the form. For this control, the *Data field* is automatically set to **$(Contact.messengers)**.

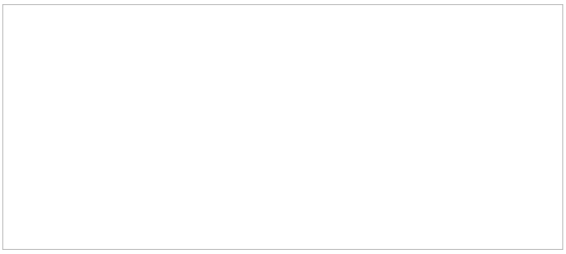
Orientation

This property allows you to display the messenger contacts either horizontally or vertically on the form.

Messenger Orientation property

Notes

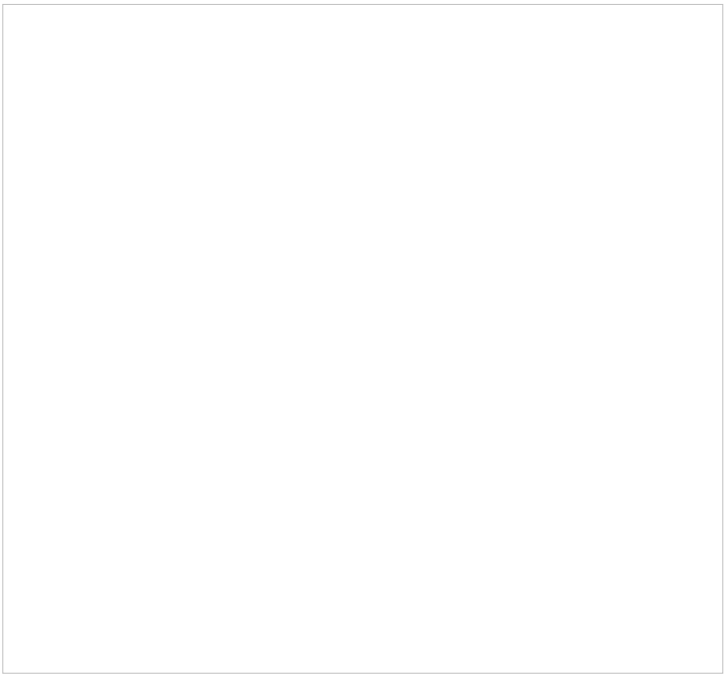
The *Notes* control places a text box on a form for entering text-only notes and comments. In Preview mode, this control appears as shown.



Notes on a form

Field Properties

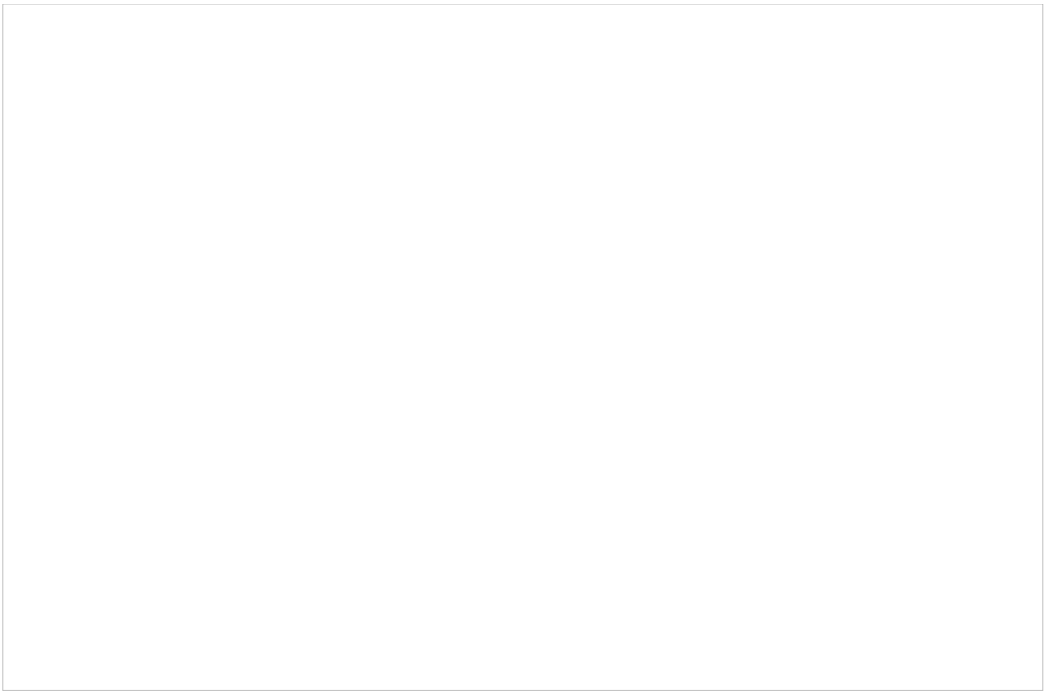
Once you have placed the control onto your form canvas, you can edit the field properties by clicking the pencil icon on the component. The field properties are described as follows.



Notes properties

Edit Mode Style

Edit Mode Style is the common property that allows you to select, edit, or add a style for this form control. For example, you may select "Text" from the selector, and click **Add / Edit** to change the style (e.g., text, font, color, etc.) of the text fields displayed on the form.



Add / Edit style

Label

Label is the name of this control that will be displayed on the form (e.g., "How can we do better?").

Hint text for empty field

This text input field is where you enter any text that you wish to display in this control's empty fields. The hint text indicates to the user what kind of text belongs in this field (e.g., "Provide feedback").

Initial number of lines

Enter the number of lines of space to include in the text box.

Initial value

You can indicate the initial value to be shown on the list. This is optional.

Custom reporting field

The *Custom reporting field* is the custom reporting field created for your contact center (if any). Such a field is unique to your contact center, as it is different from any default fields. If you do not have any custom reporting fields, select **None** from the drop-down list.

Export in campaign results

Select this checkbox to export the data collected in the notes in your call center's campaign results.

Position in campaign results

Indicate the desired position (e.g., "1") for the data collected in the notes to be placed in campaign results.

Notes System

The Notes System component is a free-form text field that duplicates the function of the**call notes** field of the Agent Desktop application.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.

Activity form notes system

Number

The *Number* control places any kind of number on a form (e.g., invoice number, ticket number, tracking number, etc.). In Preview mode, this control appears as shown.

Number field shown on a form

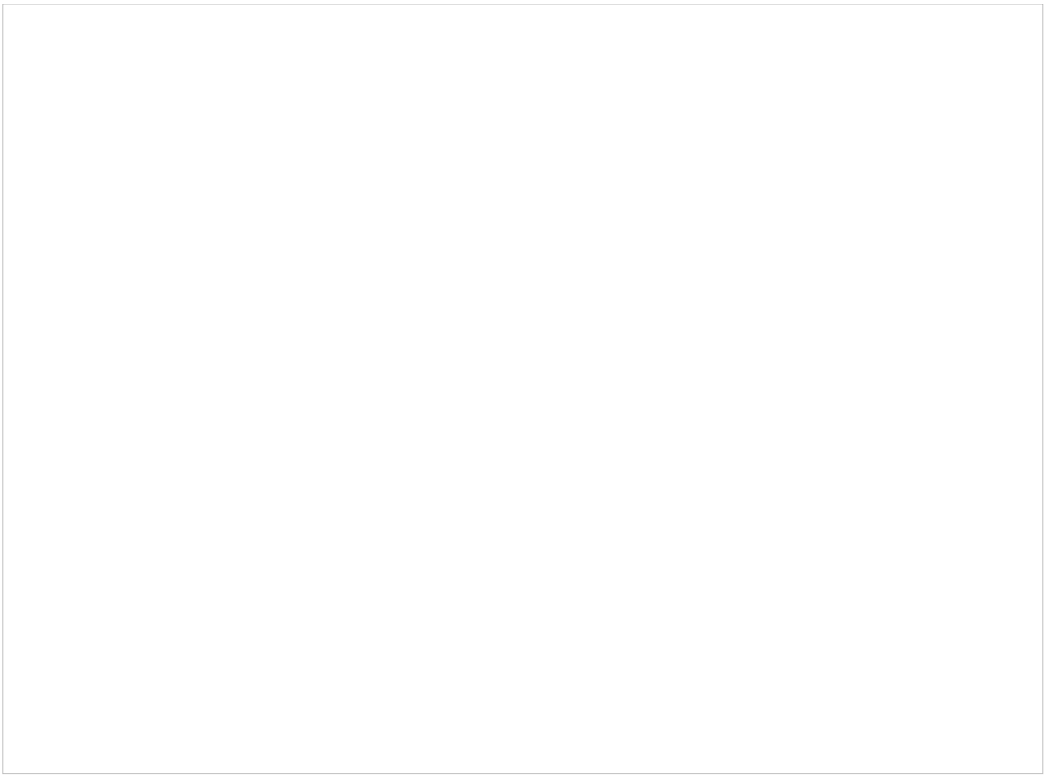
Field Properties

Once you have placed the control onto your form canvas, you can edit the field properties by clicking the pencil icon on the component. The field properties are described as follows.

Number properties

Edit Mode Style

Edit Mode Style is the common property that allows you to select, edit, or add a style for this form control. For example, you may select "Text" from the selector, and click **Add / Edit** to change the style (e.g., font, color, etc.) of any text shown on the form.



Add / Edit style

Label

Label is the name of this control that will be displayed on the form (e.g., "Tracking #").

Hint text for empty field

This text input field is where you enter any text that you wish to display in this control's empty fields. The hint text indicates to the user what kind of text belongs in this field (e.g., "UPS tracking #").

Data field

The *data field* is where you specify or select a variable that gets and includes data on the form.

Options

Editable

Select this checkbox to allow users to edit the field.

Required

Select this checkbox to require users to fill in the Number field.

Hide if read-only and empty

Select this checkbox to hide the Number field if it's empty or marked as read-only.

Display As

This option is reserved for future use.

Initial value

You can indicate the initial value to be shown in the Number field. This is optional.

Custom reporting field

The *Custom reporting field* is the custom reporting field created for your contact center (if any). Such a field is unique to your contact center, as it is different from any default fields. If you do not have any custom reporting fields, select **None** from the drop-down list.

Export in campaign results

Select this checkbox to export the data collected in the Number field in your call center's campaign results.

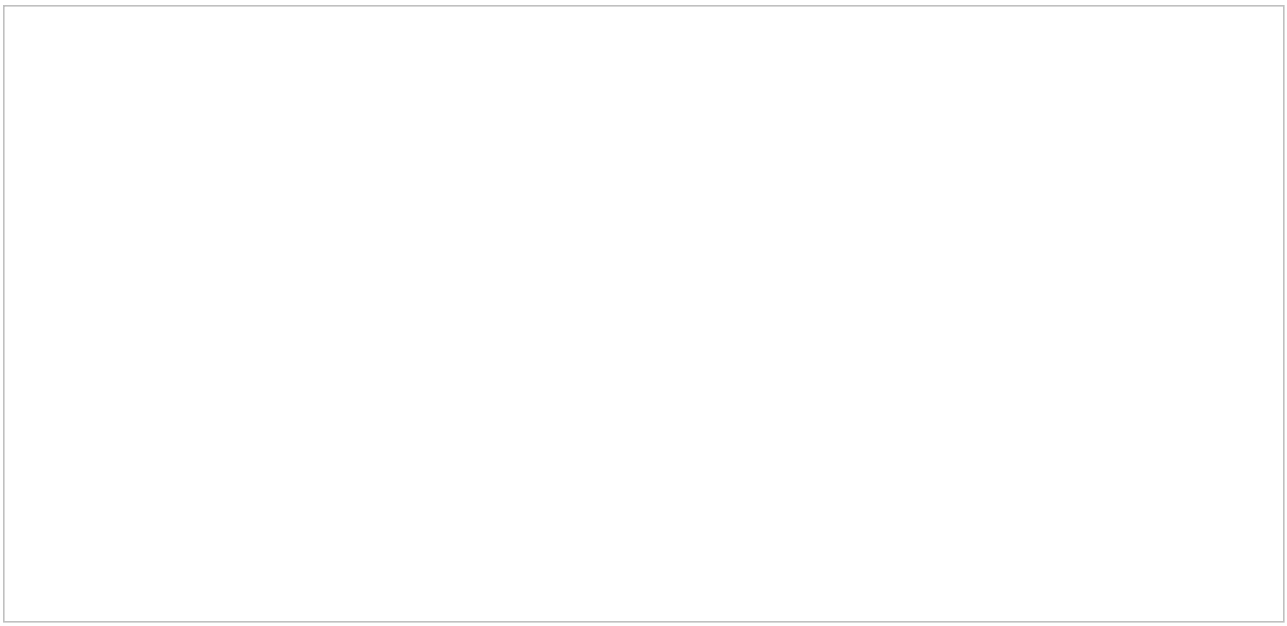
Position in campaign results

Indicate the desired position (e.g., "1") for the data collected in the Number field to be placed in campaign results.

Phone-home Multi phone

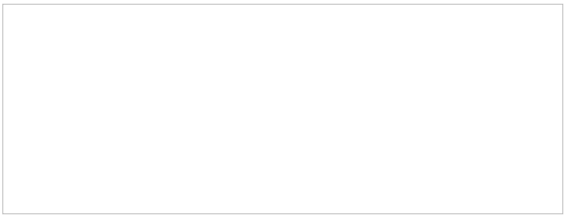
This component adds an "add phone" option, which allows the user to enter multiple phone numbers to a form, if desired.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.



Phone Number

The *Phone Number* control places a phone number field on a form. Unlike the All Phone Numbers control, this control places a field for a single phone number rather than multiple phone numbers. In Preview mode, this control appears as shown.



Phone Number field on a form

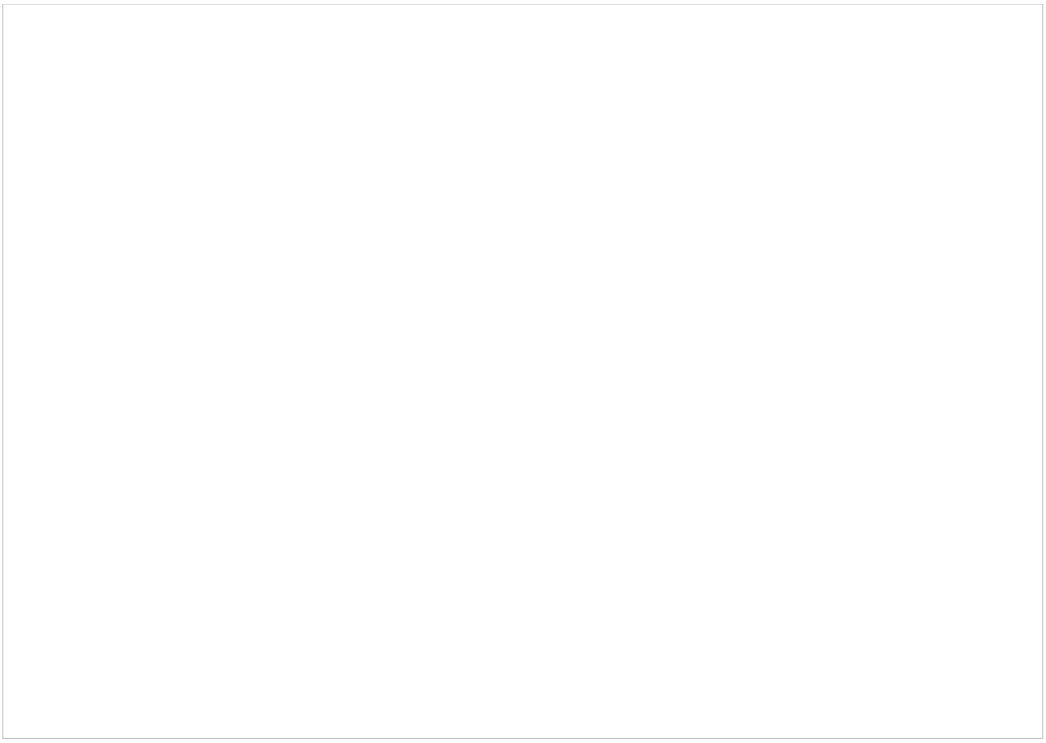
Field Properties

Once you have placed the control onto your form canvas, you can edit the field properties by clicking the pencil icon on the component. The field properties are described as follows.

Phone Number properties

Edit Mode Style

Edit Mode Style is the common property that allows you to select, edit, or add a style for this form control. For example, you may select "Text" from the selector, and click **Add / Edit** to change the style (e.g., text, font, color, etc.) of the phone number displayed on the form.



Add / Edit style

Label

Label is the name of this control that will be displayed on the form (e.g., "Best phone number to reach you").

Hint text for empty field

This text input field is where you enter any text that you wish to display in this control's empty fields. The hint text indicates to the user what kind of text belongs in this field (e.g., "xxx-xxx-xxxx").

Data field

The *data field* is where you specify or select a variable that gets and inserts specific data.

Options

Editable

Select this checkbox to allow users to edit the field.

Required

Select this checkbox to require users to enter a phone number in this field. Note that*Required* is enabled only if the field is editable.

Hide if read-only and empty

Select this checkbox to hide the Phone Number field if it's empty or marked as read-only.

Validate

Select this checkbox to validate that this is a valid phone number.

Initial value

You can indicate the initial value to be shown in the Phone Number field. This is optional.

Custom reporting field

The *Custom reporting field* is the custom reporting field created for your contact center (if any). Such a field is unique to your contact center, as it is different from any default fields. If you do not have any custom reporting fields, select **None** from the drop-down list.

Export in campaign results

Select this checkbox to export the data collected in the Phone Number field in your call center's campaign results.

Position in campaign results

Indicate the desired position (e.g., "1") for the data collected in the Phone Number field to be placed in campaign results.

Picture Static

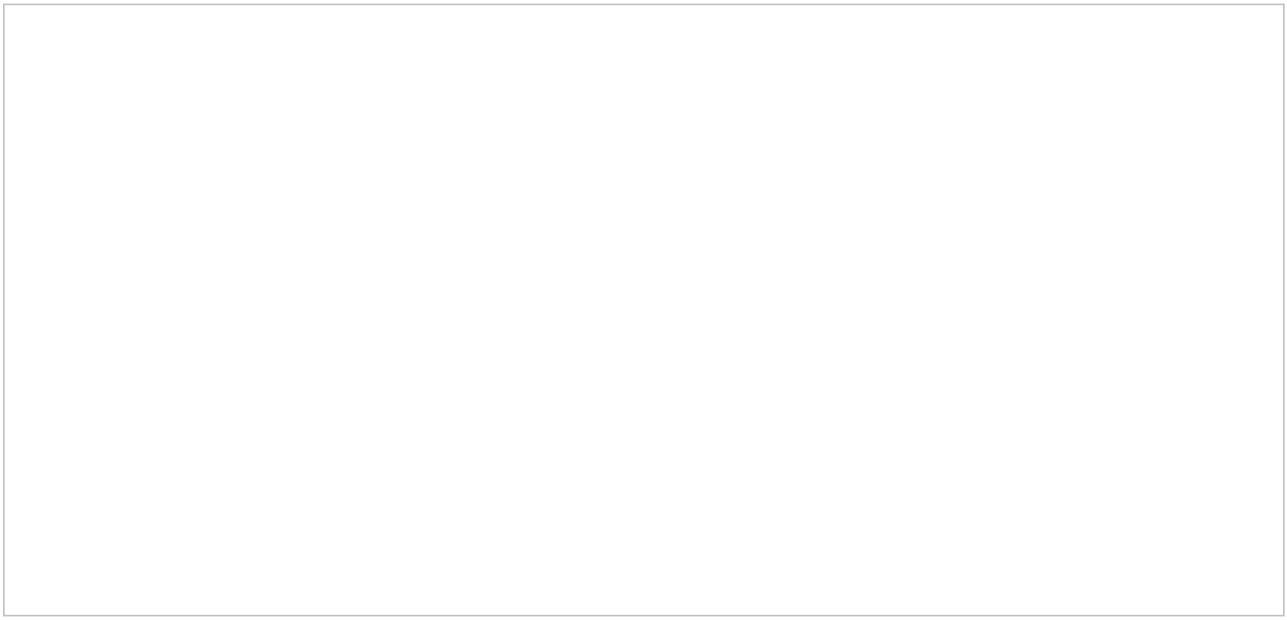
The Picture Static component is used to embed small images on your form.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.

Primarymail Multi email addresses

This component adds an "add email" option, which allows the user to enter multiple email addresses to a form, if desired.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.

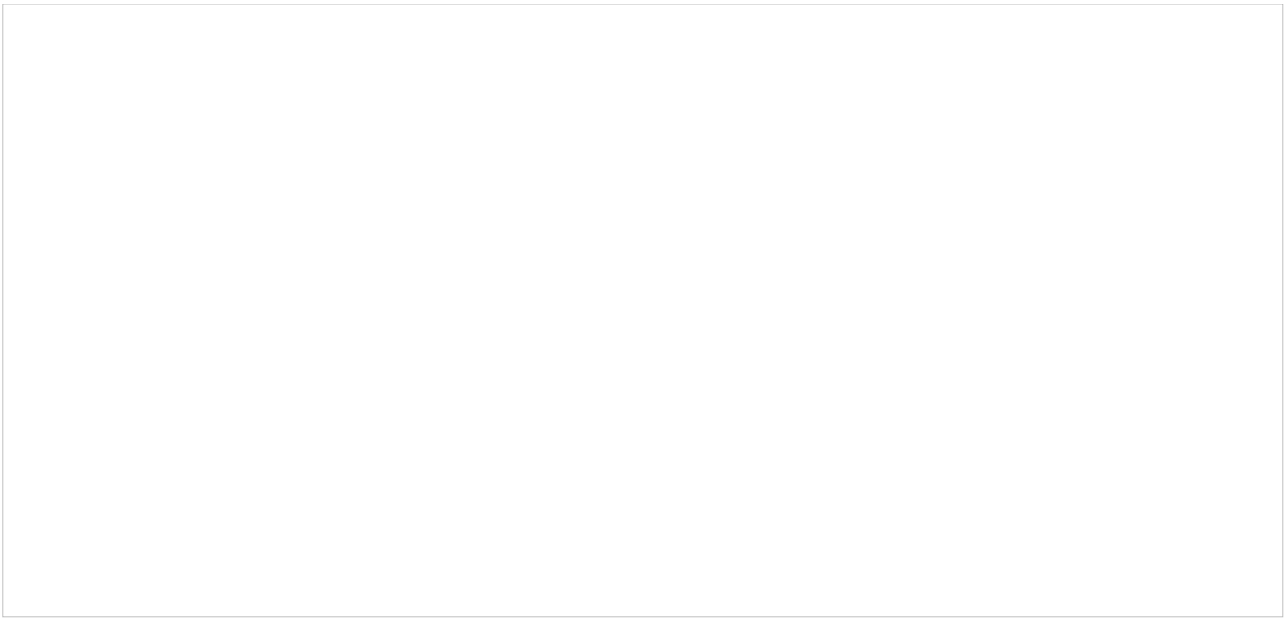


Primarymail Multi email addresses on a form

Revenue Text

Revenue Text is the field for a company's annual amount of revenue. The component is outlined in red on the example form shown.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.

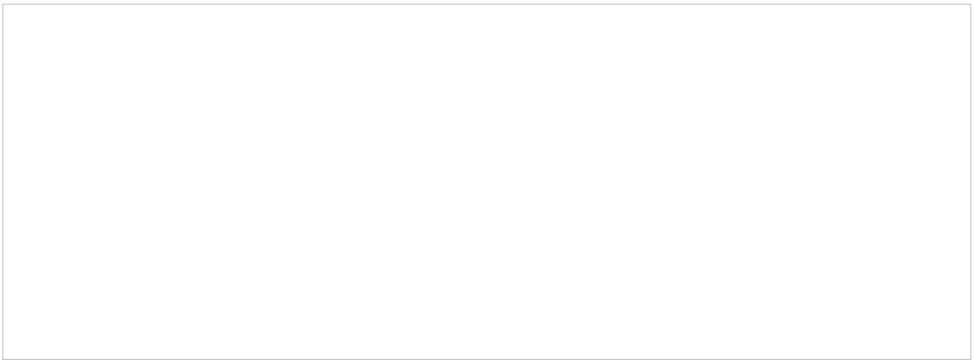


Revenue Text component in Configuration mode

Search Panel

The *Search Panel* is a form component that shows a search string, search button, and a grid that contains search results. The Form Builder application's dynamic layouts allow the Search Panel to be treated as a control and to be placed above, below, or to the side of the form's search control.

This control has no properties to edit. Once the Search Panel is placed on the form canvas, it can be either moved to a different location or deleted.

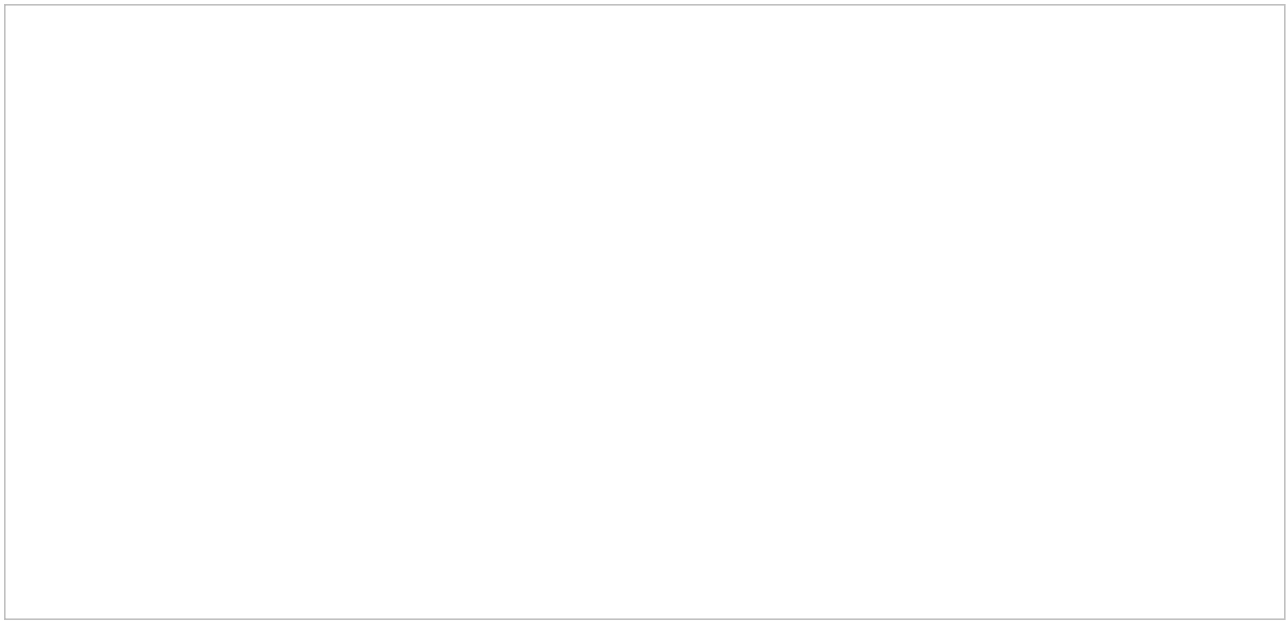


Search Panel on form canvas

Segment Key Value List

Segment Key Value List is a selector for choosing a priority level (i.e., gold, silver, or bronze) for a customer or contact.

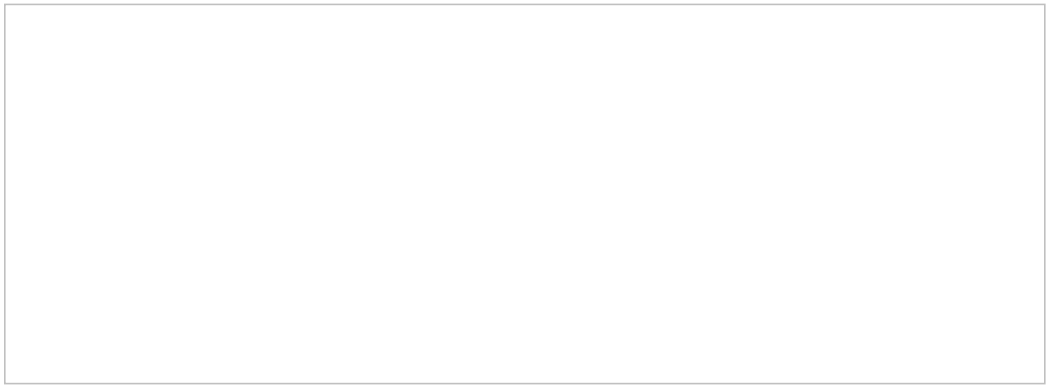
Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.



Segment Key Value List component in Configuration mode

Spacer

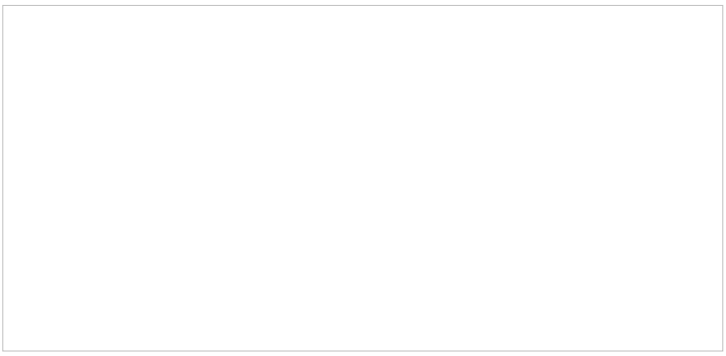
The Spacer control adds space in between other controls on a form. You can edit the Spacer's height and style in Field Properties. In Preview mode, this control appears as shown. The area outlined in red is the spacer placed in between the phone number and email address controls.



Spacer on a form

Field Properties

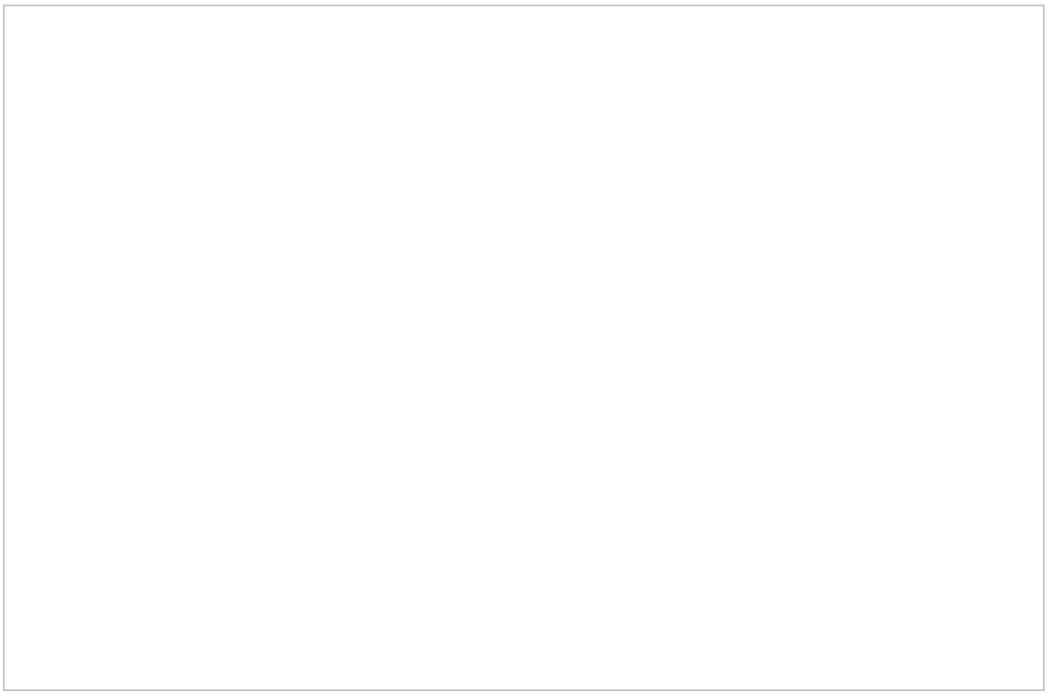
Once you have placed the control onto your form canvas, you can edit the field properties by clicking the pencil icon on the component. The field properties are described as follows.



Spacer properties

Edit Mode Style

Edit Mode Style is the common property that allows you to select, edit, or add a style for this form control. For example, you may select "Hyperlink" from the selector, and click **Add / Edit** to change the style (e.g., text, font, color, etc.) of the email address hyperlink.



Add / Edit style

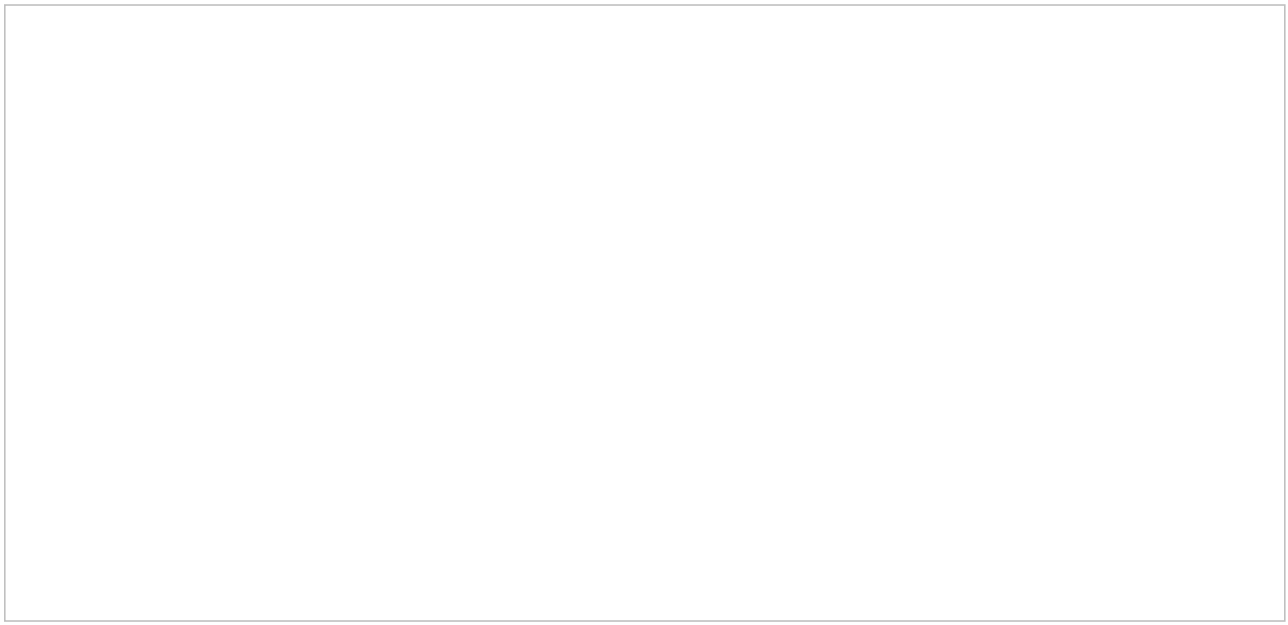
Height

You can change the height of the spacer by selecting a value from the*Height* property drop-down list: ½, 1 ½, 2, 3, 4, 5, 6, 7, 8, 9, 10. Each numeric value represents the number of rows to take on the form.

Summary Text

Summary Text is a text field for entering disposition notes that are saved with an interaction.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.



Summary Text component in Configuration mode

Text

The *Text* control places some amount of text on a form. For example, this text could be a form title, URL, policy information, shipping guidelines, text from Knowledge Base articles, or anything that your contact center requires or desires to be on a form.

In Preview mode, the Text control appears as shown. In this example, the Text control is styled as a title ("Easy Returns and Exchanges"), in a larger font size and with a contrasting background color.

Text on a form

Field Properties

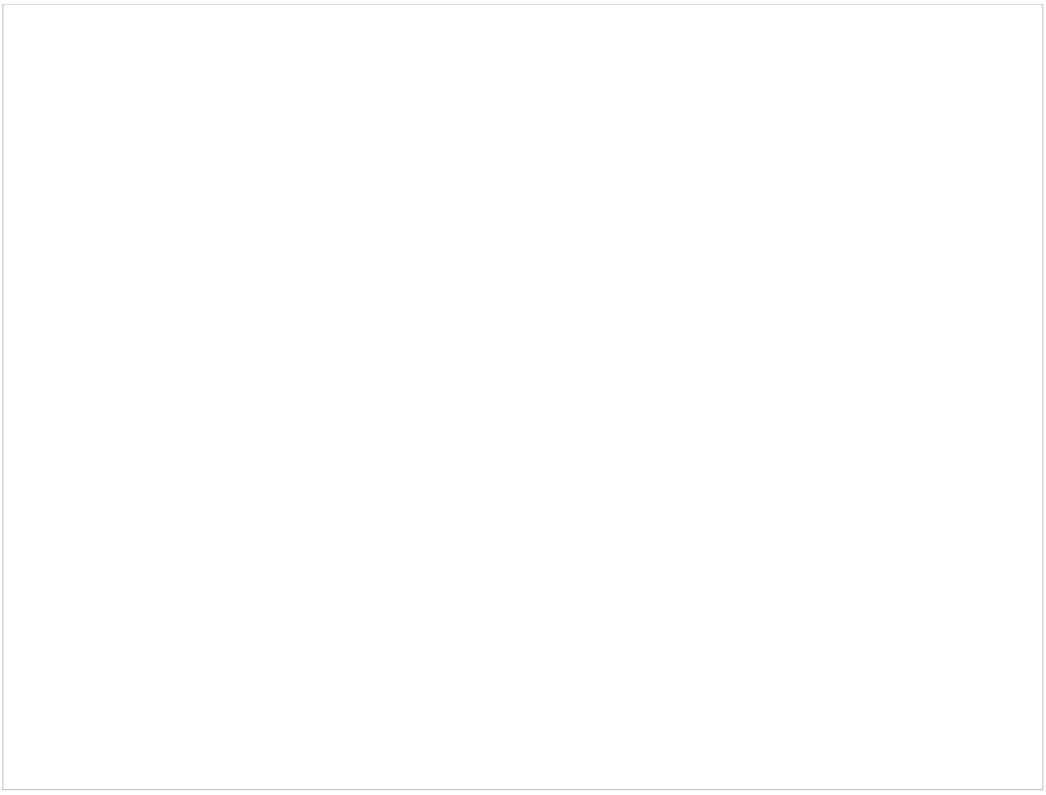
Once you have placed the control onto your form canvas, you can edit the field properties by clicking the pencil icon on the component. The field properties are described as follows.

Text properties

Edit Mode Style

Edit Mode Style is the common property that allows you to select, edit, or add a style for this form control. For example, you may select "Text" from the selector, and click **Add / Edit** to change the style (e.g., text, font, color, etc.) of the field displayed on the form.

In the example shown, the Text control is styled as a title, in a larger font size and with a contrasting background color.



Add / Edit style

Label

Label is the name of this control that will be displayed on the form (e.g., "Easy Returns & Exchanges").

Hint text for empty field

This text input field is where you enter any text that you wish to display in this control's empty fields. The hint text indicates to the user what kind of text belongs in this field (e.g., "form title").

Data field

The *data field* is where you enter a specific variable or select a variable to get and insert data into the form. For example, if a Knowledge Base article is used in an activity form, the blank, Knowledge Base-associated fields can be configured to prefill with values from activity history custom form fields. If an activity history field variable is not present in an activity form, it is not prefilled. Additionally, if a value is not set for the Knowledge Base article, the field does not prefill the form. If an agent has put some value in a field already, it is not prefilled (it will only prefill when empty).

Options

Editable

Select this checkbox to allow users to edit the Text field.

Required

Select this checkbox to require users to enter text. Note that*Required* is enabled only if the field is editable.

Hide if read-only and empty

Select this checkbox to hide the Text field if it's empty or marked as read-only.

Multiline

Select this checkbox to indicate that the Text control will contain multiple lines of text.

Destination for KB article content

Select this checkbox to indicate that Knowledge Base content will be placed inside this Text field.

Initial number of lines

Specify how many lines of text should be available. The default value is 1; a valid range is 1 to 99.

Initial value

You can indicate the initial value to be shown on the Text control. This is optional.

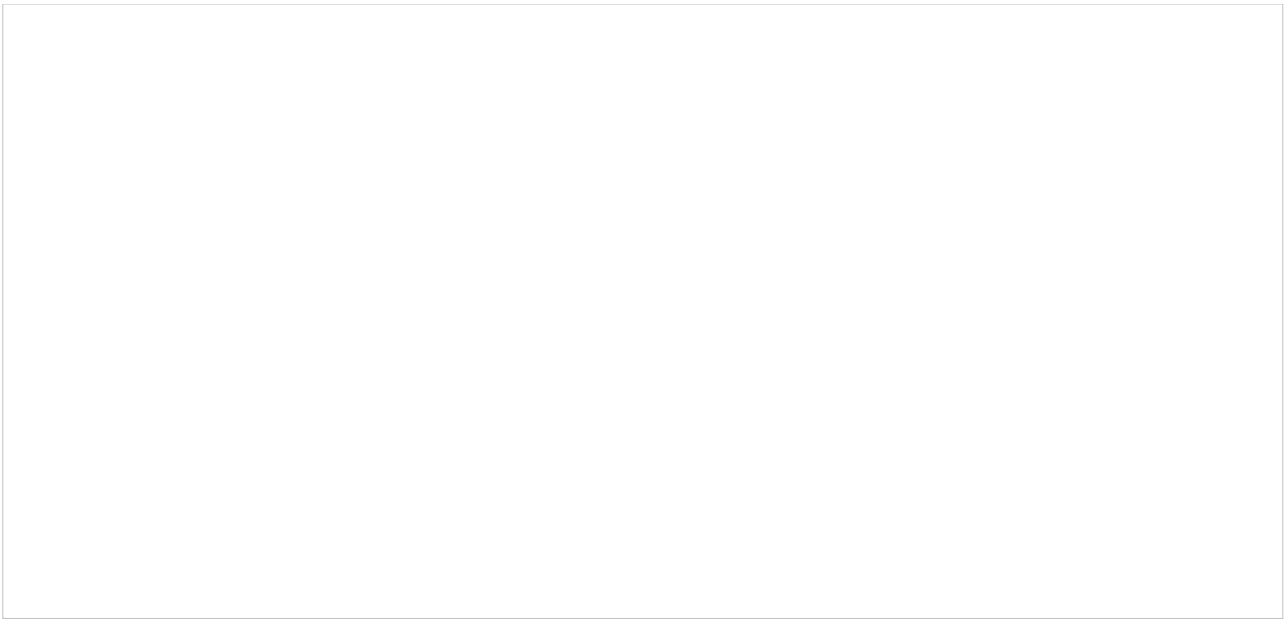
Custom reporting field

The *Custom reporting field* is the custom reporting field created for your contact center (if any). Such a field is unique to your contact center, as it is different from any default fields. If you do not have any custom reporting fields, select **None** from the drop-down list.

Title Text

Title Text is the field for adding a person's first name on a form. The component is outlined in red on the example form shown.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.



Title Text component in Configuration mode

US State

The *US State* control places a selector on a form, enabling users to select a certain state (e.g., California or "CA") in the United States. In Preview mode, this control appears as shown.

US State on a form

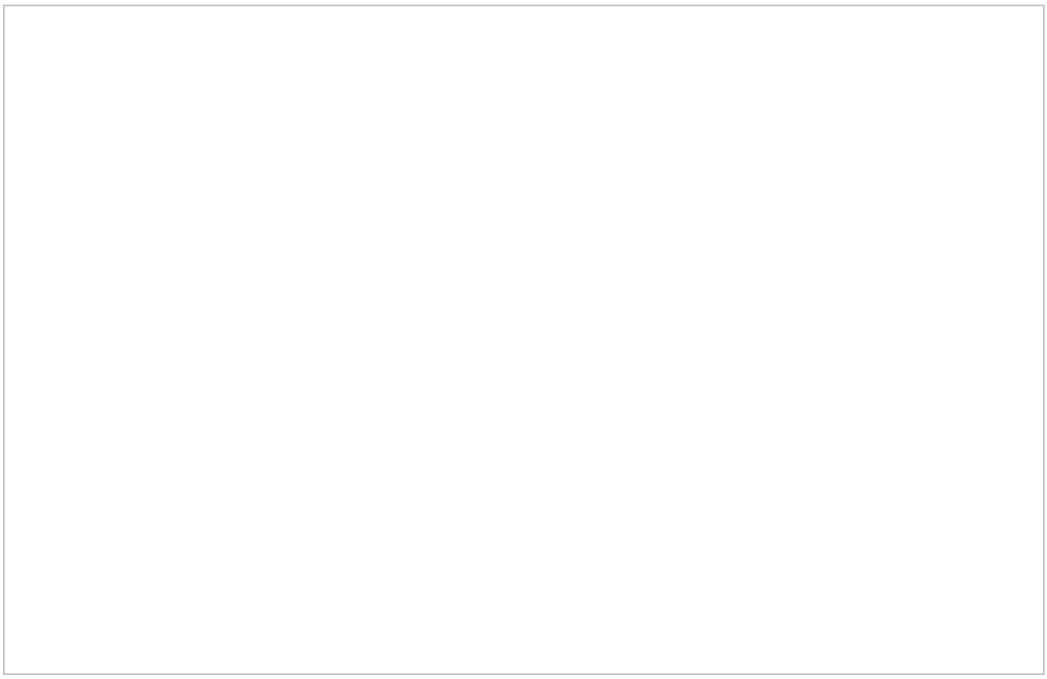
Field Properties

Once you have placed the control onto your form canvas, you can edit the field properties by clicking the pencil icon on the component. The field properties are described as follows.

US State properties

Edit Mode Style

Edit Mode Style is the common property that allows you to select, edit, or add a style for this form control. For example, you may select "Text" from the selector, and click **Add / Edit** to change the style (e.g., text, font, color, etc.) of the list fields displayed on the form.



Add / Edit style

Label

Label is the name of this control that will be displayed on the form (e.g., "Reasons for return").

Hint text for empty field

This text input field is where you enter any text that you wish to display in this control's empty fields. The hint text indicates to the user what kind of text belongs in this field (e.g., "The state where you live").

Data field

The *data field* is where you enter a specific variable or select a variable to get and insert data into the US State field (e.g., *$(Contact.addresses[PRIMARY].state)*)

Options

Editable

Select this checkbox to allow users to edit the field.

Required

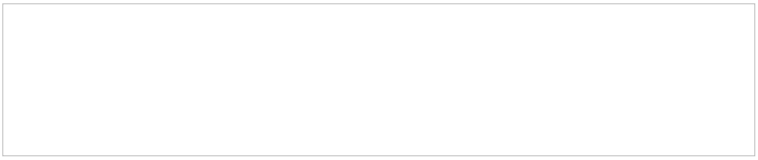
Select this checkbox to require users to make a selection. Note that*Required* is enabled only if the field is editable.

Hide if read-only and empty

Select this checkbox to hide the US State control.

Voice Signature

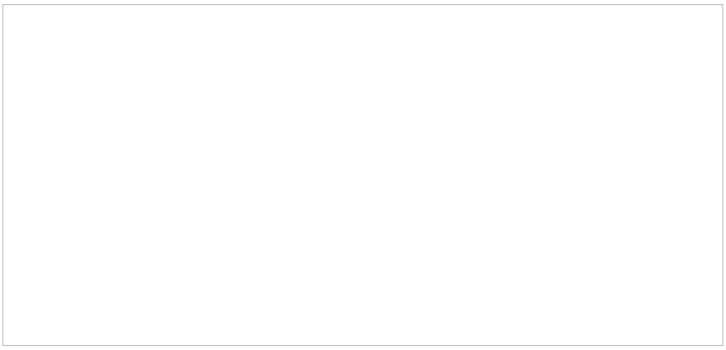
The Voice Signature control allows the agent to flag a current call as having voice signature. This control is displayed on a form as checkbox during an active interaction.



Voice Signature checkbox on a form

Field Properties

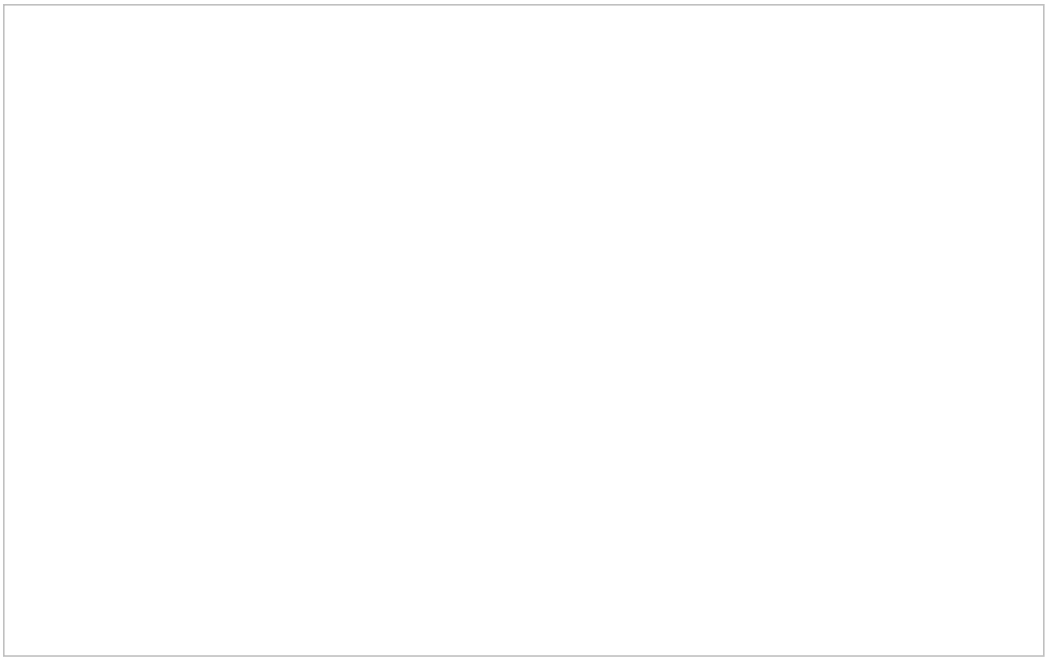
Once you have placed the control onto your form canvas, you can edit the field properties by clicking the pencil icon on the component. The field properties are described as follows.



Voice Signature properties

Edit Mode Style

Edit Mode Style is the common property that allows you to select, edit, or add a style for this form control. For example, you may select "Text" from the selector, and click **Add / Edit** to change the style (e.g., font, color, etc.) of the Voice Signature checkbox text.



Add / Edit style

Label

You can specify the label of the Voice Signature control (e.g., "Has voice signature"), which is shown on the form.

Voice Signature System

The Voice Signature System component is a checkbox that the agent will select if a voice signature has been collected during the call. It duplicates the function of the **Voice Signature** checkbox in the Contact Info Panel of the Agent Desktop application.

Note: This control is supported in version 5.x for forms created in the Form Builder application version 3.x. For component properties, see Bright Pattern Contact Center Documentation version 3.x.