Adding Workflow Forms to Presence

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Workflow Forms allow businesses to dynamically collect or update information in the call workflow within Presence.

To add a **Workflow Form** to a user's Presence **Dashboard**, first navigate to Presence by logging into Kerauno and selecting the **Presence** option from the navigation bar at the top of the **User Panel** as shown in Figure 01 below.



After selecting the **Presence** option from the dashboard, the Presence application will be displayed when loaded. Please note that the **Workflow Form** widget can be added both as a "panel" within an existing dashboard, or as its own dedicated dashboard.

NOTE: It is recommended that you add the **Workflow Form** as its own dedicated **Dashboard** to increase text size and improve usability.

Adding a Workflow Form as a New Dashboard

First, begin by adding a new **Dashboard** to **Kerauno Presence**. To do this, select the icon in the upper-right corner of the Presence application as shown in Figure 02 below. The default dashboard name upon creation is "Dashboard 1" (the number increases as more dashboards are created). After creation, the dashboard name can be modified by selecting the *icon*, entering the desired name (Example: WorkFlow Dashboard), and clicking **OK**. The newly created dashboard will, by default, have one panel in which the **Workflow Forms** widget can be added.

My Stream Conference	Call 🔻	🚺 Ben Botti <4424> - Available	•
User Dashboard	\triangleright)
MY STREAM	×	USERS 🔛	λ×
History		Name Search All Extensions	-
Kamon Toliver «4412» Nov 27, 2017 4:26:54 PM	01:13 <i>4424</i>	NAME ACCOUNT TALKING TO TALK TIME ACTIONS George Wiley 4409 < User >	
Kamon Toliver «4412» Nov 27, 2017 3:50:37 PM	34:16 <i>4424</i>	Harrison Schultz 4421 < User >	
V John Harden «BOLT4447» Nov 27, 2017 2:37:50 PM	08:57 <i>4424</i>	Jason Goughnour 4403 < User > Image: Constraint of the second se	
Sarged Call «4408»	00:00	A generation and a second	
		Figure 02: User Dashboard	

Adding the Workflow Form Widget to a

Dashboard

The following method can be used to add the new **Workflow Form** widget to an existing or new dashboard. The **Workflow Form** tool utilizes the **CRM** widget within Presence to show and display relevant information. Adding the **CRM** widget to a dashboard is the first step in utilizing the **Workflow Form** tool.

To do this, first select the on an existing or new dashboard. This page will open a dialogue in which you will be asked to select a specific type of widget to add to the dashboard. Select the **Customer Management** option from the sidebar, then select **Add to Dashboard** as shown in Figure 03 below.

All Widgets				
General				
Contacts	CRM	ØPLC .		
Parking Lots	Open web based customer records on call activity triggers.			
Conference Rooms		Add to Dashboard		
Ring Groups				
Voicemail		-		
Recordings				
Customer Management	1			
	Figure 03: Adding Customer Management Widget			

After selecting **Add to Dashboard**, a configuration screen displays that can be used to show the appropriate **Workflow Forms** information. Configure this pop-up as shown in Figure 04 below. If you leave this menu accidentally, it can be re-accessed by selecting the **or** in the upper-right corner of the dashboard.

- 1. **Name**: Enter a recognizable name for your form.
- 2. Type: Select Web.
- Open: Select Always. This will ensure that the Workflow Form will appear on all calls.
- URL: In this field, enter the URL you use to access the system followed by /#/pages/disposition? frame=true.

URL Example: If system URL is abccompany.ntegrated.com, URL entered will be http://abccompany.ntegrated.com/#/pages/disposition? frame=true.

Name WorkFlow Forms			
Type • Web Application			
Open On Demand • Alway: Open URL in new window		On Ans	swer
URL https://SYSTEMURL/#/page	es/disposition?f	rame=true	
			ОК
		_	
Figure 04: Workf	low Form Settings	n Config	guratio

NOTE: Don't forget to enter either **http://** or **https://** in front of the entered system name in the URL.

If the setup is successful, you should see the panel filled with a screen *similar* to Figure 05 on the right. This form will change based on the types of calls being received and will allow users to start taking full advantage of **Workflow Form** functionality.

CRM	CRM [WORKFLOW FORM]	
	Waiting for Call to Begin.	
	Figure 05: Workflow Form	