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.
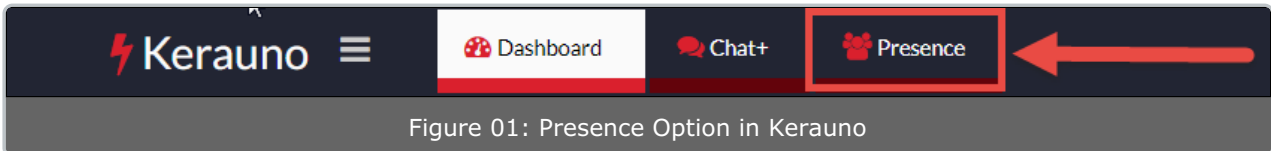

Figure 01: Presence Option in Kerauno

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.
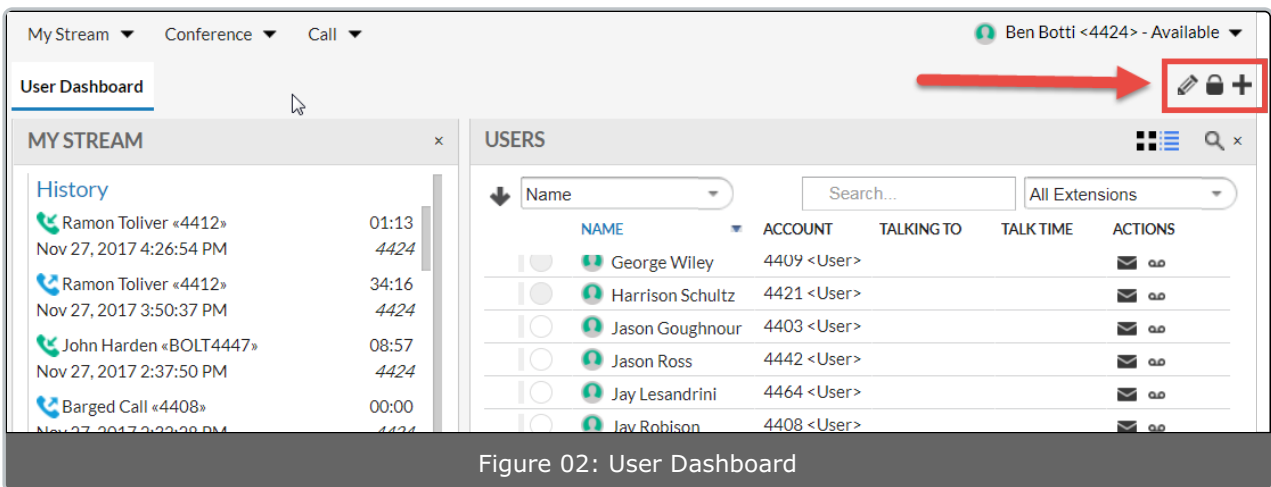

Figure 02: User Dashboard

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.

Figure 03: Adding Customer Management Widget
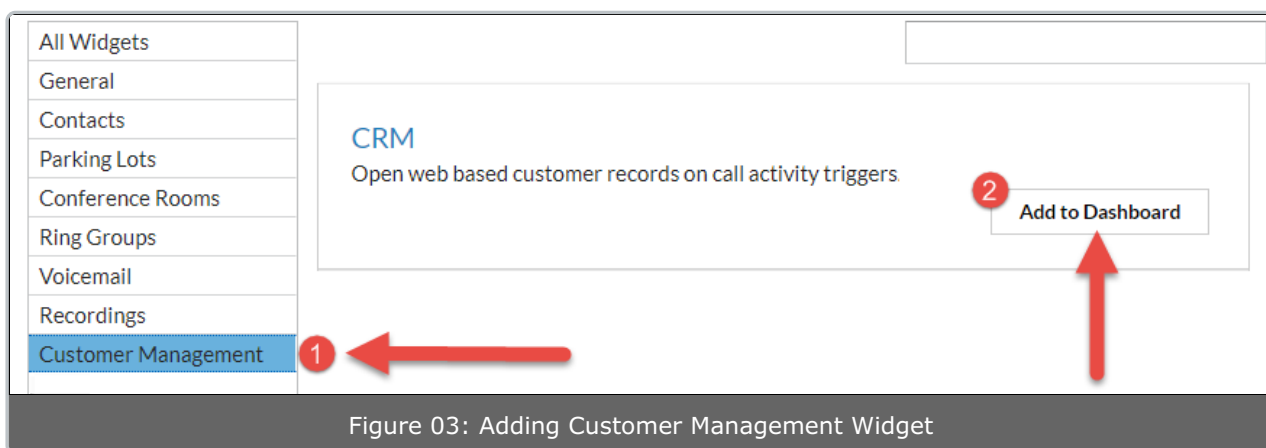
After selecting **Add to Dashboard**, a configuration screen displays that can be used to show the appropriate **Workflow Forms** information. Configure this pop-up as shown in Figure 04 below. If you leave this menu accidentally, it can be re-accessed by selecting the ⚙ icon in the upper-right corner of the dashboard.

1. **Name**: Enter a recognizable name for your form.
2. **Type**: Select **Web.**
3. **Open**: Select **Always**. This will ensure that the **Workflow Form** will appear on all calls.
4. **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.

Figure 04: Workflow Form Configuration Settings
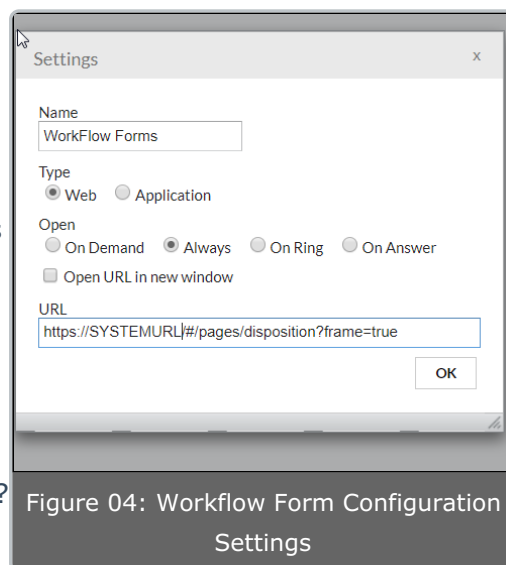
NOTE:	Don't forget to enter either **http://** or **https://** in front of the entered system name in the URL.

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.

Figure 05: Workflow Form