

# Workflow Form Report

Last Modified on 02/06/2020 2:54 pm EST

Navigate to **Reporting >Workflow Form Report**.

Call center managers can view Workflow Form data collected by agents during inbound calls.

## Prerequisites

The following prerequisites must be met in order to utilize the Workflow Form Report:

This report is available only after a

- Workflow Form created within Workflow forms
- Workflow form is active within a Call Flow
- Presence CRM Widget is configured with the URL of the Workflow Form
- When a call comes in, the agent must have the CRM Widget open where the pre-built form is displayed to collect the data.

The populated data collected during a call is available in the Workflow Form Report.

**Main Menu:**

**WORKFLOW REPORTS**

Workflow Report:

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Select Workflow Form:

Select Workflow Form(s):

Start Date: 03-February-2020      End Date: 03-February-2020

**+ Create Custom Report**

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Report Completion Options: ?

Render Report    Print Report (PDF)    Email Report    Schedule Report    Export to CSV

To run a report, select the desired **Workflow Forms**.

Select Workflow Form:

Select Workflow Form(s):

Populate a **Start Date** and **End Date** for the report.

Start Date: 22-January-2020      End Date: 22-January-2020

Click **Create Custom Report** for additional customization options.

**Note:** A Workflow Form must be selected prior to making this selection.

## Create Custom Report

Select the desired **Workflow Tag**, **Operator**, and **Value**. Use this feature to isolate specific data pieces for review, such as viewing a specific caller ID. Click the green plus sign to add additional custom workflow tags. Repeat as necessary.

Custom Report Options: ?

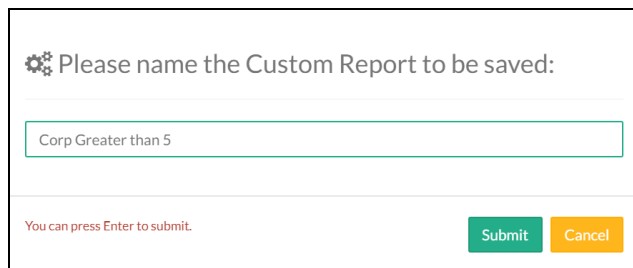
Workflow Tag: Corp    IS GREATER THAN    0    -

Workflow Tag: Main Corp IVR    IS EQUAL TO    5    +    -

**Save Custom Report** ?

Click **Save Custom Report** when finished.

Name the Custom Report and click **Submit**.



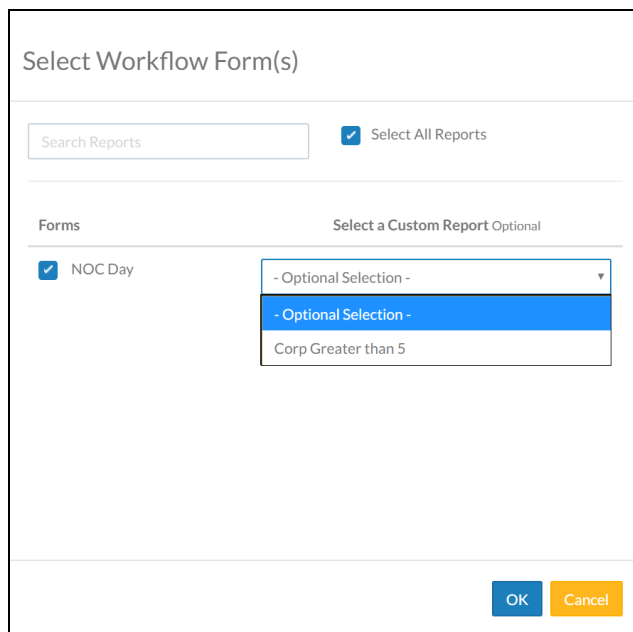
Please name the Custom Report to be saved:

Corp Greater than 5

You can press Enter to submit.

Submit Cancel

Once the Custom Report is saved, it is available for selection under Select Workflow Forms.



Select Workflow Form(s)

Search Reports  Select All Reports

Forms Select a Custom Report Optional

NOC Day

- Optional Selection -  
- Optional Selection -  
Corp Greater than 5

OK Cancel

Click **Render Report** once search criteria is populated.

Report results are displayed on screen. The variables selected within the Workflow Form are displayed in the report.

WORKFLOW CALL DETAIL RECORDS						
Date/Time	Source	Destination	Duration	Variable-1	Variable-2	Variable-3
2020-01-17 14:35:42	+0000000000	RP Roger Perkins	17			
2020-01-17 12:51:25	+0000000000	RP Roger Perkins	23			
2020-01-17 12:40:55	+0000000000	RP Roger Perkins	19			
2020-01-17 12:40:26	+0000000000	RP Roger Perkins	17			

