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

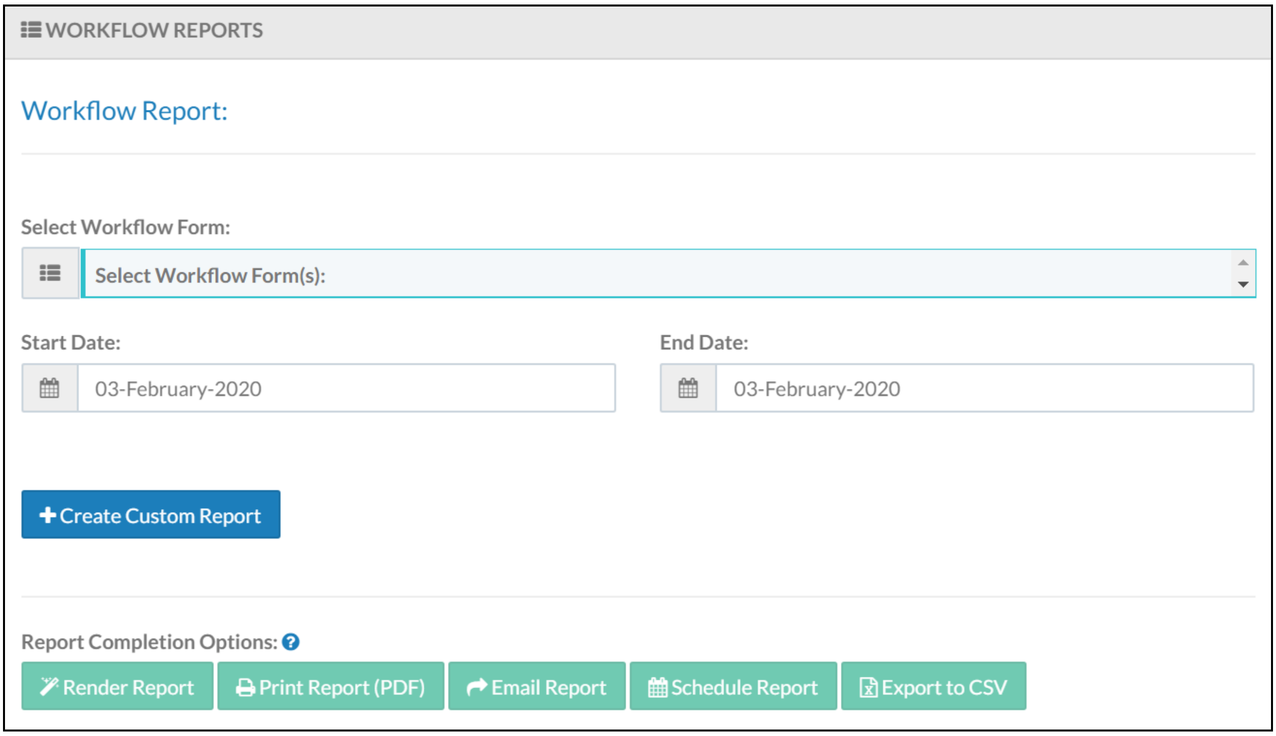
The following prerequisites must be met in order to utilize the Workflow Form Report:

This report is available only after a

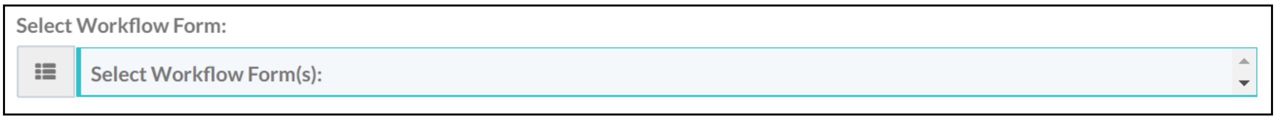
- Workflow Form created within Workflow forms
- Workflow form is active within a Call Flow
- Presence CRM Widget is configured with the URL of the Workflow Form
- When a call comes in, the agent must have the CRM Widget open where the pre-built form is displayed to collect the data.

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

Main Menu:



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



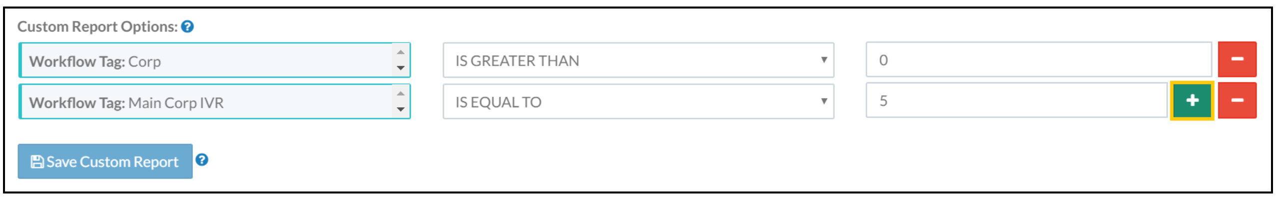
Populate a **Start Date** and **End Date** for the report.

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

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

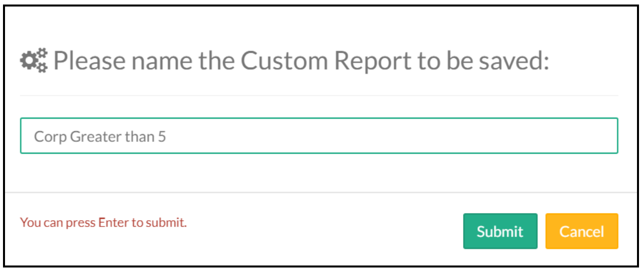
Create Custom Report

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.

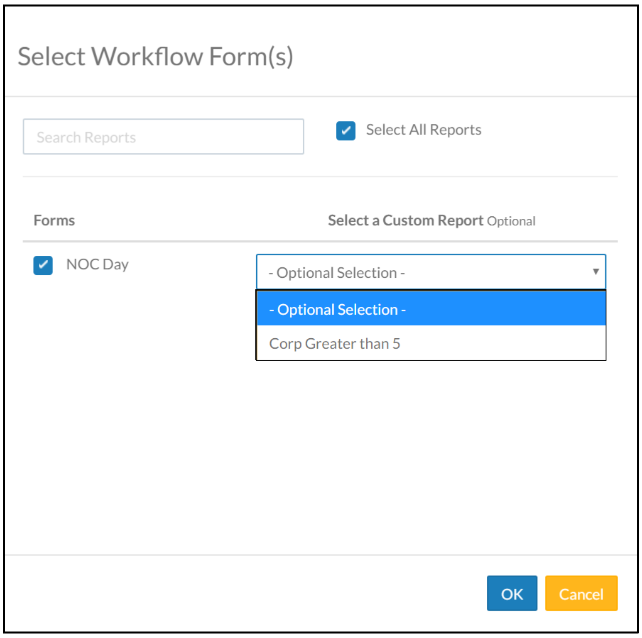


Click **Save Custom Report** when finished.

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

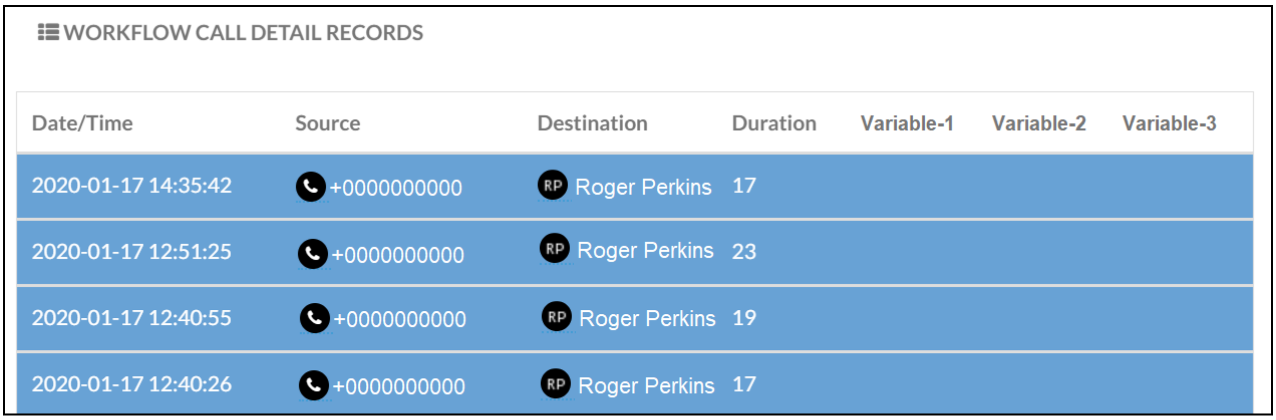


Once the Custom Report is saved, it is available for selection under Select Workflow Forms.



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			