

Nextiva Contact Center

Survey Guide

Version 1.0



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Survey Components

Panels

Panels are the way different pages or sections of a User Survey are configured and represent the canvas where a survey is designed. They follow a div HTML/CSS style of programming and design, meaning that panels can be placed inside other panels to create separate boxes or sections inside a given page. For example, the Footer and Header Panels apply the boxes at the top and bottom of the survey to display tab titles and various navigation buttons.

Panels can be used to create as many flexible sections as you like inside a survey. They have become the essential means of controlling the survey's look and feel, bringing dynamic capabilities as well as collapsible menus and sections.

Footer

The Footer panel is generally used at the bottom of a regular panel to display the survey's navigation and buttons. It can be used in various styles and actions.

A footer must be added to every separate “page” panel of a survey to navigate back and forth. One notable exception is a “goodbye” style panel, where the end user is not expected to need to navigate back to other panels.

Configuration Fields

The Footer panel will have the following configuration fields:

Field Name	Description
Component Type	Footer
Component Description	A description of the footer panel.
Type	Footer with (page) Controls or Plain Footer.
Margin	The size that is desired in pixels or other- wise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.

Icon	The icon style that will be used for the action buttons.
Button Size	Use the slider to change the button size of the controls.
Previous Action	<p>Defines what the page control “previously” does:</p> <ul style="list-style-type: none"> • Back - Moves to the previous panel that the End User was on. • Move to panel - Goes to the panel specified in the Next Panel field. • Previous Page - navigates to the previous panel in the page order.
Next Action	<p>Defines what the page control does "next".</p> <ul style="list-style-type: none"> • Move to panel - Goes to the panel specified in the Next Panel field. • Next Page - Navigates to the next panel in the page order.
Next Panel	Select the panel to which Next Action goes to.

Header

The Header panel is generally used at the top of a regular panel to display the survey's navigation buttons. The footer panel can be used in various styles and actions.

Configuration Fields

The Header Panel will have the following configuration fields:

Field Name	Description
Component Type	Header
Component Description	A description of the header panel.
Margin	The desired margin in pixels or other formats, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Title Color	The color of the title of the header.

Icon Color	The color of the icon associated with the header panel.
Background Color	The background color of the header.
Show Previous	Toggle on to get the previous page control.
Previous Action	<p>Defines what the page control “previously” does:</p> <ul style="list-style-type: none"> • Back - Moves to the previous panel that the End User was on. • Move to panel - Goes to the panel specified in the Next Panel field. • Previous Page - Navigates to the previous panel in the page order.
Previous Icon	If Show Previous is enabled, select the Icon for the previous button.
Show Options	Enable to present actions that can be taken in the header panel of the survey.
Menu Options	<p>If Show Options is enabled, these are the options that will be presented to a user:</p> <ul style="list-style-type: none"> • Back • Previous Page • Move to panel • Sound • Send Transcript
Show Close	Toggle on to get the Close page control.
Close Panel	<p>If Show Close is enabled, this defines which panel the close button goes to.</p> <ul style="list-style-type: none"> • Back - Moves to the previous panel that the End User was on. • Panel - Sets the end-state panel, e.g. “good-bye” panel.
Title Size	Use the slider to change the size of the title of the panel.

Panel

A panel is the basic component of any survey; it is the main box in which content is to be displayed. Every survey must have at least one panel that contains the other components. A panel may have more than one other panel inside it. This makes it easy to build “box inside a box” surveys, maintaining good control over the positioning of the survey contents.

Configuration Fields

The Panel component will have the following configuration fields:

Field Name	Description
Component Type	Panel
Component Description	A description of the panel.
Label	The component title.
Label Alignment	The alignment of the component title.
Label Font Size	The font size of the component title.
Description	A description to be displayed beneath the component title.
Description Alignment	The description alignment in the component.
Description Font Size	The size of the description font.
Assistance	Description to be displayed in the assistance button hover over.
Tab Label	The tab name as it should be displayed above the survey.
Panel alignment	The alignment desired for the contents of the panel.
Collapsible Menu	Makes the panel content collapsible. Displays only the Panel label and hides other content.
Default View: Content Expanded	If the collapsible menu option has been selected, then this toggle will define whether the panel is minimized by default or not. If this option is selected, then the panels content will be displayed.
Scroll	Enables scrolling of the content of this panel.
Show Scroll Bar	If enabled, there will be a visible scroll bar on the panel.
Vertical Alignment	Whether the components inside the panel will occupy the full space of the panel or be restricted to the size of the contents inside them.
Direction	Alignment of the content of the panel: row components

	or column components. The content components will span the width or height of the panel respectively.
Width	The width of the panel in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Height	The height of the panel in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Margin	The margin of the panel in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Background Color	The background color of the header panel.
Panel Shadow	Put a shadow around the panel.
Panel Border Radius	Creates a border radius around the panel. Can be entered as percentages or with pixels.
Show Overlay	Allows a new panel to be opened/closed on top of another panel. NOTE: There can be no overlay on top of another panel.
Show Header	If enabled, the header of the user survey will be visible.
Title Header	Creates a header that goes on top of the survey. NOTE: The title won't show unless you click on the header panel and change the title color or background color as needed.
Allow Panel In Dashboard	If enabled, and there's a panel configured in a dashboard to show statistics.

Overlay Panel

There can be one or more overlay panels on top of another panel.

Configuration Fields

The Overlay Panel will have the following configuration fields:

Field Name	Description
Component Type	Overlay Panel
Component Description	A description of the overlay panel
Label	Overlay Panel
Label Alignment	The alignment of the component title.
Label Font Size	The font size of the component title.

Description	A description to be displayed beneath the component title.
Description Alignment	The description alignment in the component.
Description Font Size	The font size of the description.
Assistance	A description to be displayed when the assistance button is hovered over.
Tab Label	The tab name that should be displayed above the survey.
Panel Alignment	The alignment desired for the contents of the panel.
Collapsible Menu	Makes the panel content collapsible. Displays only the Panel label and hides other content.
Default View: Content Expanded	If the collapsible menu option has been selected, then this toggle will define whether the panel is minimized by default or not. If this option is selected, then the panels content will be displayed upon first loading.
Scroll	Enables scrolling of the content of this panel.
Vertical Alignment	Whether the components inside the panel will occupy the full space of the panel or be restricted to the size of the contents inside them.
Direction	Alignment of the content of the panel: row components or column components. The content components will span the width or height of the panel respectively.
Width	The width of the panel in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Height	The height of the panel in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Margin	The margin of the panel in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.

URL

This panel displays an external web page or a URL script inside of it. Companies can use this to show their personal scripts to agents without rebuilding them if they already have them in web format.

Configuration Fields

The URL panel will have the following configuration fields:

Field Name	Description
Component Type	URL
Component Description	A description of the URL panel.
Label	The component title.
Label Alignment	The alignment of the component title.
Label Font Size	The font size of the component title.
Description	A description to be displayed beneath the component title.
Description Alignment	The description alignment in the component.
Description Font Size	The size of the description font.
Assistance	Description to be displayed in the assistance button hover over.
Tab Label	The tab name that should be displayed above the survey.
Panel Alignment	The alignment desired for the contents of the panel.
Vertical Alignment	Whether the components inside the panel will occupy the full space of the panel or be restricted to the size of the contents inside them.
Direction	Alignment of the content of the panel: row components or column components. The content components will span the width or height of the panel respectively.
URL	The URL that points to the desired page to be displayed.
Condition	A JavaScript expression for displaying the component. The component will show if the expression returns True.
Use Reverse Proxy	For websites with enhanced security protocols like reverse proxy it is important to mark this toggle for the URL to be displayed.
Properties	If a URL requires header properties, then use this section to create the key value pairs which will be called when getting information from the target site.

Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.

Waiting for Agent

Waiting panels present waiting messages; they are configured so that after a certain event happens, the survey will automatically move to a separate section. The standard waiting panel is used in customer-facing surveys and waits for an agent to be available for a Chat workitem. The panel displays a waiting message before moving on to the Chat conversation panel when an agent becomes available.

Configuration Fields

The Waiting for Agent panel will have the following configuration fields:

Field Name	Description
Component Type	Waiting for Agent
Component Description	A description of the panel.
Component Type	Waiting for Agent
Component Description	A description of the Waiting for Agent panel.
Label	The component title.
Label Alignment	The alignment of the component title.
Font Size	The font size of the component title.
Description	A description to be displayed beneath the component title.
Description Alignment	The description alignment in the component.
Font Size	The size of the description font.
Assistance	The description to be displayed when the assistance button is hovered over.
Tab Label	The tab name that should be displayed above the survey.
Waiting Message	Custom waiting message.
Waiting Message Font Size	The waiting message font size.

Waiting Icon	The waiting icon to be displayed.
Waiting Icon Font Size	The size of the waiting icon.
Waiting Icon Color	Select a color for the icon.
Display	Size of the waiting message panel content: full panel or fit to content.
Terminate Message	The termination message to be displayed.
End Panel	The panel to move to when the message is terminated.
Use Reverse Proxy	For websites with enhanced security protocols like reverse proxy it is important to mark this toggle for the URL to be displayed.

Waiting On Event

The Waiting on Event panel is displayed to the agent while the customer is going through a workflow.

Configuration Fields

The Waiting on Event panel will have the following configuration fields:

Field Name	Description
Component Type	Waiting On Event
Component Description	A description of the Waiting on Event panel.
Label	The component title.
Label Alignment	The alignment of the component title.
Font Size	The font size of the component title.
Description	A description to be displayed beneath the component title.
Description Alignment	The description alignment in the component.
Font Size	The size of the description font.
Assistance	Description to be displayed in the assistance button hover over.
Tab Label	The tab name that should be displayed above the survey.

Message Variable Update	A JavaScript expression that contains the variable with the event message updates.
Waiting Message	Custom waiting message.
Waiting Message Font Size	The waiting message font size.
Waiting Icon	The waiting icon to be displayed.
Waiting Icon Font Size	The size of the waiting icon.
Waiting Icon Color	Select a color for the icon.
Waiting Icon Animation Speed	The speed at which the animation icons rotate through.
Display	Size of the waiting message panel content: full panel or fit to content.
Panel alignment	The alignment desired for the contents of the panel.
Panel Vertical Alignment	Whether the components inside the panel will occupy the full space of the panel or the size of the contents inside them
Direction	Alignment of the content of the panel: row components or column components. The content components will span the width or height of the panel respectively.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Panel	Panel to move to when the process is completed successfully.
Set Variables On Success	Sets variables in the workitem when the process is completed successfully.
On Error Panel	The panel to move to when the process is completed unsuccessfully.
Set Variables On Error	Sets variables in the workitem when the process is completed unsuccessfully.

Inputs

Input fields are a way for the user of a survey to send information to the NCC back-end. There is a wide variety of inputs available, and each can be customized. Form fields, labels, and conditions can all be used to present different options dynamically and make the User Survey a great tool for creating scripts that guide agents through the process of collecting customer information. The best way to use inputs is to consider when an agent or customer will be required to enter some

piece of information in the application. There are many reasons why they may want to do this, but there are 2 main categories for it detailed below.

The first category is for use in a workflow. Customer-facing surveys are often used for starting Chat workitems or requesting Callbacks, and these will need to pass data into a workflow that will handle the incoming or outgoing workitem.

The second is for reporting purposes. Many businesses may send questionnaires to their customers to gauge satisfaction with the quality of the service, product, or customer support. These will require some question-and-answer recordings. Each input field includes a report label so that the survey report can be used more efficiently.

Boolean

A Boolean variable is binary, either True or False. It allows for the display of dynamic components based on quick 2-way selections. It can be used for both agent-facing and customer-facing surveys.

Configuration Fields

The Boolean input will have the following configuration fields:

Field Name	Description
Component Type	Boolean
Component Description	A description of the Boolean input.
Label	The component title.
Report Label	The tag that will identify the field inside the survey reports.
Font Size	The font size of the component title.
Assistance	The description to be displayed in the assistance button, when it's hovered over.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Default value	If the toggle is to be enabled by default, select True.

Fieldname	The unique name that identifies the field within the survey, should be alphanumeric and cannot contain whitespace.
Condition	A JavaScript expression for displaying the component. The component will show if the expression returns true.

Captcha

If Captcha inputs are required to verify a customer-facing survey is not being handled by an automated process, then use this component.

Configuration Fields

The Captcha input will have the following fields:

Field Name	Description
Component Type	Captcha
Component Description	A description of the Captcha input.
Label	The component title.
Fieldname	The unique name that identifies the field within the survey, should be alphanumeric and cannot contain whitespace.
ReCaptcha Site Key	The license from Captcha needs to be purchased separately.

Chat Panel

Chat panels are the Nextiva resource from which messages can be sent to and from a customer's device. This component is linked to a company campaign that will need to hold a Chat specific workflow. Please refer to the Chat function or Chat campaign documentation for details on how to configure these.

Configuration Fields

The Chat panel input will have the following configuration fields:

Field Name	Description
Component Type	Chat Panel
Component Description	A description of the Chat Panel input.
Vertical Alignment	Whether the chat panel will occupy the entire height available to it or fit to the contents.
Width	The size that is desired in pixels or other- wise, following the CSS formatting rules. E.g., 180px.
Margin	The size that is desired in pixels or other- wise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Allow Attachments	If enabled, attachments will be allowed in the chat panel.
Allow Voice Messages	If enabled, voice messages will be allowed in the chat panel.
Allow Emoji	If enabled, emojis will be allowed in the chat panel
On Terminate	The action to be carried out when the agent terminates the chat workitem: <ul style="list-style-type: none"> • Message • Move to panel • None...
Termination Message	The message to be displayed if On Terminate is set to Message.
End Panel	The survey panel to move to, if On Terminate is set to Move to panel.

Date

A date input is used to pass a particular epoch value as an integer to the workitem survey. This input drops a calendar in the survey, which can be used to select a particular date and time, which is then converted into an epoch value. This value will then be stored in the workitem survey results object and can be used for callbacks and other event triggers, such as sending emails.

Configuration Fields

The Date input will have the following configuration fields:

Field Name	Description
Component Type	Date
Component Description	A description of the Date input.
Label	The component title.
Report Label	The tag that will identify the field inside the survey reports.
Font Size	The font size of the component title.
Assistance	The description to be displayed in the assistance button, when it's hovered over.
Width	The size that is desired in pixels or other- wise, following the CSS formatting rules. E.g., 180px.
Margin	The size that is desired in pixels or other- wise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Fieldname	The unique name that identifies the field within the survey, should be alphanumeric and cannot contain whitespace.
Default value	A default value in epoch time to select. This will be the current date at which the calendar is opened if not defined.
Condition	A JavaScript expression for displaying the component. The component will show if the expression returns true.
Mandatory Field	Enable this toggle if the field must be filled in. A survey validation disposition will not allow dispositioning of the work- item if the field is not filled in.
Show Time	Enable, if the calendar is to include the time in the date field displayed.
Select Year	Enable, if the calendar is to include the year selection.

HTML

The HTML input lets users add HTML rendered in the survey. This gives the user more flexibility in how they want the survey presented. With this input, the text size, text color, bold, italics, and more can be edited. The user must be proficient in HTML.

Configuration Fields

The HTML input will have the following configuration fields:

Field Name	Description
HTML	The custom HTML to be displayed in the survey.
Assistance	The description to be displayed in the assistance button, when it's hovered over.
Height	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Condition	A JavaScript expression for displaying the component. Component will show if the expression returns true.

Image

The Image input allows an image to be uploaded to a Nextiva Contact Center survey.

Configuration Fields

The Image input will have the following configuration fields:

Field Name	Description
Component Type	Image
Component Description	A description of the Image input.
Message	The message here will be presented under the image in the survey.
Attached File	The file of the image.
Image Width	Use the slider to set the image width in the survey.
Image Height	Use the slider to set the image height in the survey.
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 4px.
Condition	A JavaScript expression for displaying the component. Component will show if the expression returns true.
Set Variables	Any variables that are to be set that contain the image
Panel	The panel to move to after seeing the image.
Style	Any custom styling for the message.

Input

This input provides a form where the end user can input information. It is a plain box in which the information may be recorded and saved in the corresponding field name in the survey.

Configuration Fields

The Input will have the following fields:

Field Name	Description
Component Type	Input
Component Description	A description of the Input component.
Label	The component title.
Report Label	The tag that will identify the field inside the survey reports.
Font Size	The font size of the component title.
Assistance	The description to be displayed in the assistance button, when it's hovered over.
Width	The size that is desired in pixels or other- wise, following the CSS formatting rules. E.g., 80px.
Margin	The size that is desired in pixels or other- wise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px
Fieldname	The unique name that identifies the field within the survey, should be alphanumeric and cannot contain whitespace.
Default value	The default value of the field.
Condition	A JavaScript expression for displaying the component. The component will show if the expression returns true.
REGEX	Allows you to choose a regular expression from the list. This expression will be applied to the input value and will not let the user proceed unless it's satisfied. It is a form of input validation.
Validation Message	This is the message that will be displayed after the validation of the regular expression from the REGEX field.
Mandatory Field	Enable, if the field must be filled in. A survey validation disposition will not allow dispositioning of the workitem if the field is not filled in.

Read Only	Enable, if this input field is read-only. This will stop a user from changing its value.
Validate Condition on Each Character	Validates the REGEX on each character input from the user. For example, if you are asking for only numbers and the user inputs a special character it will immediately warn the user.
Sensitive Data Do Not Store	Enable, if the input field will contain sensitive data, so it will not be saved.
Save to Local Storage	If enabled, this will save data to the storage the application is using.

Knowledge Base

The Knowledge Base input performs an API call with a keyword to a knowledge base and displays that information.

Configuration Fields

The Knowledge Base input will have the following configuration fields:

Field Name	Description
Component Type	Knowledge Base
Component Description	A description of the Knowledge Base component.
Label	The component title.
Label Alignment	The alignment of the component title.
Label Font Size	The font size of the component title.
Description	A description of the knowledge base that customers will see.
Description Alignment	The alignment of the description text.
Description Font Size	The size of the description font.
Assistance	The description to be displayed in the assistance button, when it's hovered over.

Tab Label	The tab name to be displayed above the survey.
Condition	A JavaScript expression for displaying the component. The survey component will show if the expression returns true.
Search Label	The name of the Search field to be displayed to customers.
Search Label Alignment	The alignment of the search label.
Search Label Font Size	The font size of the search label.
Placeholder	The text that will be shown when the field is empty indicates to the user, they can type something in there.
Type	The type of HTTP method. The types are: Delete, Form, Get, Patch and Post.
URL	The AP that will be called to pass data for the knowledge base search.
Icon	The icon in the field that you want to click on to do the search. The options are Bullseye, Eye, Filter, Like, Next, Operator, Play, Right, Search and Send.
Input Margin	The margin in pixels or otherwise of the input, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Background Color	The background color of the text field.
Input Margin	The margin in pixels or otherwise of the input, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Background Color	The background color of the text field.
Fieldname	The unique name that identifies the field within the survey, should be alphanumeric and cannot contain whitespace.
Default Value	The value you want to be searched for by default.
Properties	Properties to be passed in the body of the search: these are label – value pairs.
Headers	Headers that are to be included with the search: these are label – value pairs.
Width	The width in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Margin	The margin in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Name Fieldname	The fieldname that will hold the list of items.
Fieldname Row 1	The first option to pass “Name Field- name”

	from other components (usually previous list information "Name Field- name").
Fieldname Row 2	The second option to pass "Name field- name" from other components (usually previous list information "Name Field- name").
Fieldname Row 3	The third option to pass "Name field- name" from other components (usually previous list information "Name Field- name").
Selected Variable Name	The variable being passed to the knowledge base that a knowledge base can do a search for and return data.
Show Scroll Bar	If enabled, there will be a visible scroll bar on the panel.

List

A list is used to display information from an API call, for example from, from an action button. The list is formed from an array that is the result of a call to either Nextiva or a third-party system. The variables the calls are then displayed in a list, like the multi-select component but with its own formatting. It has the option to select values from it.

Configuration Fields

The List input will have the following configuration fields:

Field Name	Description
Component Type	List
Component Description	A description of the List input.
Label	The component title.
Label Alignment	The alignment of the component title.
Label Font Size	The font size of the component title.
Description	The description of the component.
Description Alignment	The alignment of the description text.
Description Font Size	The size of the description font.
Assistance	The description to be displayed in the assistance button, when it's hovered over.

Tab Label	The tab name to be displayed above the survey.
Panel alignment	The alignment desired for the contents of the panel.
Vertical alignment	Full or Fit Content.
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 4px.
Data variable	The variable's name that contains the data to be displayed in the component.
Icon fieldname	The fieldname of the variable that will define the icon to be displayed (use this or The Icon field).
Icon	The icon to be displayed (use this or The Icon Filename field).
Name Fieldname	The fieldname that will hold the list of items.
Fieldname row 1	The first option to pass "Name Field- name" from other components (usually previous list information "Name Field- name").
Fieldname row 2	The second option to pass "Name field- name" from other components (usually previous list information "Name Field- name").
Fieldname row 3	The third option to pass "Name field- name" from other components (usually previous list information "Name Field- name").
Selected Variable Name	Value of the data that holds the selected item.
Variable To Store (empty to store the item)	This is the variable that will be used in subsequent survey components to access the result.

Multi-Select

A multi-select component displays a list of values allowing multiple selections of these. It is a check-box type component, and a user can select up to all the values. The component takes a list and displays the labels and passes the values to the survey results variable inside a workitem. You may display the values by hard coding values or by passing a JavaScript function result of type array.

Configuration Fields

The multi-select input will have the following configuration fields:

Field Name	Description
Component Type	Multi-select
Component Description	A description of the multi-select input.
Label	The component title.
Report Label	The tag that will identify the field inside the survey reports.
Font Size	The font size of the component title.
Assistance	The description to be displayed in the assistance button, when it's hovered over.
Width	The desired size in pixels or otherwise, following the CSS formatting rules.
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
List max height	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px
Fieldname	The unique name that identifies the field within the survey, should be alphanumeric and cannot contain whitespace.
Options	The list of radio button options. The label will be displayed, and the value will be passed on in the survey result at the end of the workitem.
Allow Wrap Text	Allows longer labels by wrapping the text around to fit inside the component width.
Expression	This expression takes an array variable. It may be the result of an API call or a JavaScript function, making this component very flexible for displaying filtered results in an automated way, allowing the survey to load values rather than hardcode them.
Default value	Insert a default value that you would like the component to display.
Condition	A JavaScript expression for displaying the component. The survey component will show if the expression returns true.
Mandatory Field	Enable, if the field must be filled in. A survey validation disposition will not allow dispositioning of the workitem if the field is not filled in.

Radio Button

A radio button allows a mutually exclusive set of values to be displayed. Only one value may be selected from a radio button component. You may have multiple options though only a single circular box will be selected by the user. This is most useful when only one option of many is to be selected.

Configuration Fields

The Radio Button input will have the following configuration fields:

Field Name	Description
Component Type	Radio Button
Component Description	A description of the Radio Button input.
Label	The component title.
Report Label	The tag that will identify the field inside the survey reports.
Font size	The font size of the component title.
Assistance	The description to be displayed in the assistance button, when it's hovered over.
Orientation	Whether the buttons are to be vertically or horizontally displayed.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
List max height	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Fieldname	The unique name that identifies the field within the survey, should be alphanumeric and cannot contain whitespace.
Options	The list of radio button options. The label will be displayed, and the value will be passed in the survey result at the end of the work- item.

Allow Wrap Text	Allows longer labels by wrapping the text around to fit inside the component width.
Options	The list of radio button options. The label will be displayed, and the value will be passed in the survey result at the end of the work- item.
Allow Wrap Text	Allows longer labels by wrapping the text around to fit inside the component width.
Expression	This expression takes an array variable. It may be the result of an API call or a JavaScript function, making this component very flexible for displaying filtered results in an automated way, allowing the survey to load values rather than hardcode them.
Default value	Insert a default value that you would like the component to display.
Condition	A JavaScript expression for displaying the component. The survey component will show if the expression returns true.
Mandatory Field	Enable, if the field must be filled in. A survey validation disposition will not allow dispositioning of the workitem if the field is not filled in.

Rate

The Rate input is used to set up a star-rating field, which is commonly used in customer satisfaction surveys. Multiple options, including stars and smiley faces, are available.

Configuration Fields

The Rate input will have the following configuration fields:

Field Name	Description
Component Type	Rate
Component Description	A description of the Rate input.
Label	The component title.
Report Label	The tag that will identify the field inside the survey reports.
Font size	The font size of the component title.
Assistance	The description to be displayed in the assistance button, when it's hovered over.
Fieldname	The unique name that identifies the field within the

	survey, should be alphanumeric and cannot contain whitespace.
Items	Number of items to include (up to 10).
Icon	The style of icon to use.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Default value	Insert a default value that you would like the component to display.
Condition	A JavaScript expression for displaying the component. The component will show if the expression returns true.
Mandatory Field	Enable, if the field must be filled in. A survey validation disposition will not allow dispositioning of the workitem if the field is not filled in.

Rate Agent

This input allows customers to rate the agent they are interacting with. The customer will see the message; the agent will not.

Configuration Fields

The Rate Agent input will have the following configuration fields:

Field Name	Description
Component Type	Rate Agent
Component Description	A description of the Rate Agent component.
Label	Rate Agent
Report Label	The tag that will identify the field inside the survey reports.
Font size	The font size of the component title.
Assistance	The description to be displayed in the assistance button, when it's hovered over.

Fieldname	The unique name that identifies the field within the survey, should be alphanumeric and cannot contain whitespace.
Thumbs Up	An icon that will represent a positive review.
Thumbs Down	An icon that will represent a negative review.
Width	The desired width of the input, in pixels or otherwise, following the CSS formatting rules. EG: 4px,8px or 0px,0px,0px,4px
Margin	The desired margin of the input, in pixels or otherwise, following the CSS formatting rules. EG: 4px,8px or 0px,0px,0px,4px
Default value	If the toggle is to be on by default, select True.
Condition	A JavaScript expression for displaying the component. The component will show if the expression returns true.
Mandatory Field	Enable, if the field must be filled in. A survey validation disposition will not allow dispositioning of the workitem if the field is not filled in.
Rate Message	The message that will be inserted in the conversation and sent to the agent, if enabled.
Display to Agent	If Display to Agent is enabled, then the agent will see the feedback in near real- time in the chat. If disabled, the agent will not receive feedback.

Search

This component will display information based on a search from an API call with a keyword. The search component allows you to specify where you're searching in the URL. You can specify the fields presented in the list as part of the component's parameters.

Configuration Fields

The Search input will have the following configuration fields:

Field Name	Description
Component Type	Search
Component Description	A description of the search.
Placeholder	The text that will be shown when the field is empty indicates to the user, they can type something in there.
Type	The type of HTTP method. The types are: Delete, Form, Get, Patch and Post.
URL	The URL that is to be accessed.
Icon	The icon style that will be used for the search.
Background Color	The background color of the search field.
Width	The width in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Margin	The margin in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Fieldname	The unique name that identifies the field within the survey, should be alphanumeric and cannot contain whitespace.
Default value	The default value in the search box.
Condition	A JavaScript expression for displaying the component. The survey component will show if the expression returns true.
Result Variable	The variable name in which to store the result of the search used primarily when calling APIs.
Properties	Properties to be passed in the body of the search: these are label – value pairs.
Headers	Headers that are to be included with the search: these are label – value pairs.
Set Variables on Success	Variables to set on success, you may use this to create new variables or change values of fields in the survey when the search is successful.
On Success	The action to be taken if the search is successful. It will be either Message, Move to Panel, None, and Show Over- lay
Success Message	If On Success is set to Message, this is the message when the search is successful.
On Success Panel	If On Success is set to Move to Panel, this will be the panel that it moves to.

Set Variables on Error	Variables to set on error, you may use this to create new variables or change values of fields in the survey when the search fails.
On Error	The action to be taken if the search fails. It will be either Message, Move to Panel or None...
Error Message	If On Error is set to Message, this is the message when the search is unsuccessful.
On Error Panel	The panel to go to if the search is unsuccessful. If "On Error" is set to Move to Panel, this will be the panel that it moves to.

Select

A Select component is the classic drop-down field in web forms. It allows users to select a single value from a list of values. As with the multi-select component, you may use this component to draw on an array from an API result.

Configuration Fields

The Select input will have the following configuration fields:

Field Name	Description
Component Type	Select
Component Description	A description of the Select input.
Label	The component title.
Report Label	The tag that will identify the field inside the survey reports.
Font Size	The font size of the component title.
Assistance	The description to be displayed in the assistance button, when it's hovered over.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.

Fieldname	The unique name that identifies the field within the survey, should be alphanumeric and cannot contain whitespace.
Options	The options that will appear in the drop- down menu in the survey.
Expression	This expression takes an array variable. It may be the result of an API call or a JavaScript function, making this component very flexible for displaying filtered results in an automated way, allowing the survey to load values rather than hard-code them.
Default value	Insert a default value that you would like the component to display.
Condition	A JavaScript expression for displaying the component. The component will show if the expression returns true.
Mandatory Field	Enable, if the field must be filled in. A survey validation disposition will not allow dispositioning of the workitem if the field is not filled in.
On Data Changed Event	When the data of a component is changed, this triggers a refresh of the list in the Select component.
Sort Based On	What you want the options to be sorted by in the survey, Label, Value or Other.

Separator

A separator is a horizontal line that may be used to separate components or panels. This is a flexible component that can be used to create solid color boxes as well.

Configuration Fields

The Separator input will have the following configuration fields:

Field Name	Description
Component Type	Separator
Component Description	A description of the Separator input.
Line Size	Select the thickness of the line.
Line Color	Select the color of the line.
Orientation	The orientation of the separator, horizontal or vertical.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Height	The height in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Condition	A JavaScript expression for displaying the component. The survey component will show if the expression returns true

Stylized Radio Button

Like the radio button component, this is used when only one selection is to be made in a field. The difference between this component and the radio button is that HTML may be used here to style the size and shape of the buttons rather than adapting to the survey's theme.

Configuration Fields

The Stylized radio button input will have the following configuration fields:

Field Name	Description
Component Type	Stylized Radio Button
Component Description	A description of the Stylized Radio Button input.
Label	The component title.
Report Label	The tag that will identify the field inside the survey reports.
Font Size	The font size of the component title.
Assistance	The description to be displayed in the assistance button, when it's hovered over.
Orientation	The orientation of the radio button.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
List Max Height	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Fieldname	The unique name that identifies the field within the survey, should be alphanumeric and cannot contain whitespace.
Options	The list of radio button options. The label will be displayed, and the value will be passed on in the survey result at the end of the workitem.
Expression	This expression takes an array variable. It may be the result of an API call or a JavaScript function, making this component very flexible for displaying filtered results in an automated way, allowing the survey to load values rather than hardcode them.
Default value	Insert a default value that you would like the component to display.

Condition	A JavaScript expression for displaying the component. The survey component will show if the expression returns true.
Mandatory Field	Select this toggle if the field must be filled in. A survey validation disposition will not allow dispositioning of the workitem if the field is not filled in.

Text

A text component is used to display direct text. The text field may use HTML and CSS to modify the look and field of the text inside it, as well as variables to create dynamic changes in the component. The text component is more of a display component than an input component, as it does not take any input from the end user.

Configuration Fields

The Text input will have the following configuration fields:

Field Name	Description
Component Type	Text
Component Description	A description of the Text input.
Text	The text to be displayed.
Font Size	The font size of the component.
Assistance	The description to be displayed in the assistance button, when it's hovered over.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Text Alignment	The alignment of the text.
Condition	A JavaScript expression for displaying the component. The survey component will show if the expression returns true.

Text area

A text area component is a free-form text box that takes input from the end user. It allows for large amounts of text to be input. A good example of how this component is used is to write descriptions or long pieces of text.

Configuration Fields

The Text area input will have the following configuration fields:

Field Name	Description
Component Type	Text area
Component Description	A description of the Text area input.
Label	The component title.
Report Label	The tag that will identify the field inside the survey reports.
Font size	The font size of the component title.
Assistance	The description to be displayed in the assistance button, when it's hovered over.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Height	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Margin	The desired size pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Fieldname	The unique name that identifies the field within the survey, should be alphanumeric and cannot contain whitespace.
Default value	Insert a default value that you would like the component to display.
Condition	A JavaScript expression for displaying the component. The survey component will show if the expression

	returns true.
Mandatory Field	Select this toggle if the field must be filled in. A survey validation disposition will not allow dispositioning of the workitem if the field is not filled in.
Validate Condition on Each Character Input	Validates the regex on each character input by the user. For example, if you are asking for only numbers and the user inputs a special character it will immediately warn the user of this.
Sensitive Data Do Not Store	If the input field contains sensitive data, enable so the information is not saved.

Actions

Action

An action button is used to call an API. It's the most flexible survey component and can be used for different free-form function calls, from third-party API calls to native NCC dispositions, including options to access external URLs.

Configuration Fields

The Action will have the following configuration fields:

Field Name	Description
Component Type	Action
Component Description	A description of the Action.
Label	The component title.
Font size	The font size of the component title.
Height	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Padding	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.

Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Condition	A JavaScript expression for displaying the component. The survey component will appear if the expression returns true.
Type	The types of action that may be carried out: Delete, Form, Get, New Tab, New Window, Patch and Post
URL	The URL that is to be accessed.
On Event	Whether the action is done on click of the button or on loading the survey.
URL Proxy	Enable to use reverse proxy when accessing the URL.
Result Variable	The name of the variable to store the result of the Action, used primarily when calling APIs.
Properties	Properties to be passed in the body of the API call: these are label - value pairs.
Headers	Headers that are to be included with the API call: these are label - value pairs.
Set Variables On Success	Variables to set on success, you may use this to create new variables or change values of fields in the survey when the API call is successful.
On Success	The action to be taken if the API call is successful.
Success Message	The message to be displayed if the API call is successful and On Success is set to Message.
On Success Panel	The panel to move to if the API call is successful if On Success is set to Move to panel.
Set Variables On Error	Variables to set on error, you may use this to create new variables or change values of fields in the survey when the API call fails.
On Error	The action to be taken if the API call fails.
Error Message	The message to be displayed if the API call is unsuccessful and On Error is set to Message.
On Error Panel	The panel to move to if the API call is unsuccessful and On Error is set to Message.
Hide App	This will hide the application if enabled.

Style	Adds optional HTML and CSS styles to the action button.
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Availability

This refers to a queue's channel availability. When selecting this button, you may access the information stored in the ACD about how many users are logged in and what work items are in the queue. This is useful when making transfers to a queue or requesting a conference with a supervisor for agent-facing surveys.

Configuration Fields

The Availability action will have the following configuration fields:

Field Name	Description
Component Type	Availability
Component Description	A description of the Availability action.
Label	The component title.
Font size	The font size of the component title.
Text Font size	The font size of the text of the queue availability.
Assistance	The description to be displayed when the assistance button is hovered over.
Height	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Padding	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Condition	A JavaScript expression for displaying the component. The survey component will show if the expression returns true.

Queues	The queues that you would like to retrieve information on from the ACD.
Channel	The channels that the user may be interested in receiving information from.

Chat

A Chat action carries out calls to workflows and campaigns that handle chats. It's the button that initiates a chat for a customer, and then triggers a new workitem.

Configuration Fields

The Chat action will have the following configuration fields:

Field Name	Description
Component Type	Chat
Component Description	A description of the Chat action.
Label	The component title.
Font size	The font size of the component title.
Height	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Padding	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Condition	A JavaScript expression for displaying the component. The survey component will show if the expression returns true.
Campaign	Select the Chat campaign from the drop down. Every action must have a campaign passed either by the drop-down or by the expression variable.

Campaign Expression	The survey field that contains the name of the customer initiating the Chat.
Name Field	The survey field that contains the name of the customer initiating the Chat.
Email Field	The survey field that contains the email of the customer initiating the Chat.
Properties to send as message	Fields in the survey that are to be forwarded as information to the agent when they receive the newly created chat workitem.
Data Attached	Fields and other data that will be attached to the workitem that is being created. These go in the Data field inside workitems, like what might be saved in a workflow.
Set Variables On Success	Variables to set on success, you may use this to create new variables or change values of fields in the survey when the chat initiation is successful.
On Success	Action to be taken if the chat initiation is successful.
On Success Panel	The panel to move to if the chat initiation is successful and On Success is set to Move to panel.
Set Variables On Error	Variables to set on error, you may use this to create new variables or change values of fields in the survey when the chat initiation fails.
On Error	Action to be taken if the chat initiation call fails.
On Error Panel	The panel to move to if the chat initiation is unsuccessful and On Error is set to Move to panel.
Style	Adds optional HTML and CSS styles to the action button.

Conference

A Conference action creates a conference between a user's active calls when they click it. This button can only be used when there are 2 or more active calls or calls on hold.

Configuration Fields

The Conference action will have the following configuration fields:

Field Name	Description
Component Type	Conference
Component Description	A description of the Conference action.
Label	The component title.
Font size	The font size of the component title.
Height	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Padding	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Condition	A JavaScript expression for displaying the component. The survey component will show if the expression returns true
Set Variables On Success	Variables to set on success, you may use this to create new variables or change values of fields in the survey when the conference API call is successful.
On Success	Action to be taken if the conference API call is successful.
On Success Panel	The panel to move to if the conference API call is successful and On Success is set to Move to panel.

Set Variables On Error	Variables to set on error, you may use this to create new variables or change values of fields in the survey when the conference API call fails.
On Error	Action to be taken if the conference API call fails.
On Error Panel	The panel to move to if the conference API call is unsuccessful and On Error is set to Move to panel.
Style	Adds optional HTML and CSS styles to the action button.

Dial

The Dial action has different features for calling from a button in a survey. It takes the “To” number as a variable and can offer conferences on connection of the call. This component will open a new outbound call workitem when triggered. This is only used on agent-facing surveys.

Configuration Fields

The Dial action will have the following configuration fields:

Field Name	Description
Component Type	Dial
Component Description	A description of the Dial action.
Label	The component title.
Font size	The font size of the component title.
Height	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Padding	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.

Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Condition	A JavaScript expression for displaying the component. The survey component will show if the expression returns true.
Use Consent on Dial	Make a lookup in the consent table on the field that will be the object of the dial.
Phone Field	Fieldname that holds the phone value.
Phone expression	Expression may be passed instead of “Phone Field” to point at the target number.
Campaign	Select the Chat campaign from the drop down. Every action must have a campaign passed either by the drop-down or by the expression variable.
Campaign Expression	The survey field that contains the name of the customer initiating the Chat.
Spoof ANI	Enables spoofing on outbound ANI calls.
Conference on dial	Initiates a conference with the current active workitem on dialing the number.
Set Variables On Success	Variables to set on success, you may use this to create new variables or change values of fields in the survey when the Dial API call is successful.
On Success	Action to be taken if the Dial API call is successful.
On Success Panel	The panel to move to if the Dial API call is successful and On Success is set to Move to panel.
Set Variables On Error	Variables to set on error, you may use this to create new variables or change values of fields in the survey when the Dial API call fails
On Error	Action to be taken if the Dial API call fails.
On Error Panel	The panel to move to if the Dial API call is unsuccessful and On Error is set to Move to panel.
Style	Adds optional HTML and CSS styles to the action button.

Digital Outbound

This action launches an API to initiate a digital outbound workitem. This button is used to send an outbound templated SMS or Email to an address defined in the survey. It could be both customer and agent-facing and used to contact a third party as well.

Configuration Fields

The Digital Outbound action will have the following configuration fields:

Field Name	Description
Component Type	Digital Outbound
Component Description	A description of the Digital Outbound action.
Label	The component title.
Font size	The font size of the component title.
Height	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Padding	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Condition	A JavaScript expression for displaying the component. The survey component will show if the expression returns true.
Type	Whether the outbound workitem is an Email or SMS workitem.
Campaign	The campaign that will send the outbound workitem, this will list the campaigns enabled for Email and SMS.

Campaign expression	Passes an expression which defines the outbound campaign to use instead of the “Campaign” field.
To Field	The address which must receive the outbound message.
To Expression	A JavaScript expression which replaces the To Field instead, allowing to pass the address as a variable.
From	The address which must receive the out- bound workitem.
Data Attached	The data to be attached to the outbound workitem.
Set Variables On Success	You may use this to create new variables or change values of fields in the survey when the Digital Outbound API call is successful.
On Success	The action to be taken if the Digital Outbound API call is successful.
Success Message	The message that will be displayed if On Success is set to Message and the Digital Outbound API call is successful.
On Success Panel	The panel to move to if On Success is set to Move to panel and the Digital Out- bound API call is successful.
Set Variables On Error	Variables to set on error, you may use this to create new variables or change values of fields in the survey when the Digital Outbound API call fails.
On Error	The action to be taken if the Digital Outbound API call fails.
Error Message	The message that will be displayed if On Error is set to Message and the Digital Outbound API call is unsuccessful.
On Error Panel	The panel to move to if On Error is set to Move to panel and the Digital Outbound API call is unsuccessful.
Style	Adds optional HTML and CSS styles to the action button.

Inbound Email

The Inbound Email action creates an inbound email from a survey. You can pass information from a text area component as a body to an email and place it in a queue. This action is mostly used on customer-facing surveys.

Configuration Fields

The Inbound Email action will have the following configuration fields:

Field Name	Description
Component Type	Inbound Email
Component Description	A description of the Inbound Email action.
Label	The component title.
Font size	The font size of the component title.
Height	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Padding	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Condition	A JavaScript expression for displaying the component. The survey component will show if the expression returns true.
From	The field containing the address that the inbound email is coming from.
Subject	The field containing the subject of the email.
Body	The field that holds the text to be passed as body of the email.
Campaign	The campaign that will receive the inbound message, this will list the campaigns enabled for email.
Campaign expression	Passes an expression which defines the inbound campaign to use instead of the “Campaign” field.
Data Attached	The data to be attached to the outbound workitem.
Set Variables On Success	You may use this to create new variables or change values of fields in the survey when the Inbound Email API

	call is successful.
On Success	The action to be taken if the Inbound Email API call is successful.
Success Message	The message that will be displayed if the Inbound Email API call is successful and On Success is set to Message.
On Success Panel	The panel to move to if the Inbound Email API call is successful and On Success is set to Message.
Set Variables On Error	Variables to set on error, you may use this to create new variables or change values of fields in the survey when the Inbound Email API call fails.
On Error	The action to be taken if the Inbound Email API call fails.
Error Message	The message that will be displayed if the Inbound Email API call is unsuccessful and On Error is set to Message.
On Error Panel	The panel to move to if the Inbound Email API call is unsuccessful and On Error is set to Move to panel.
Style	Adds optional HTML and CSS styles to the action button.

Move to Panel

The Move to Panel action switches to a specific tab in the survey, a direct page change within the current survey.

Configuration Fields

The Move to Panel action will have the following configuration fields:

Field Name	Description
Component Type	Move To Panel
Component Description	A description of the Move to Panel action.
Label	The component title.
Font size	The font size of the component title.
Height	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.

Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Padding	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Condition	A JavaScript expression for displaying the component. The survey component will show if the expression returns true.
Set Variables	Any variables to be set when the action is completed successfully.
Panel	The target panel to move to.
Hide App	This will hide the application, if enabled.
Style	Adds optional HTML and CSS styles to the action button.
Send Message to Workflow	If enabled, the workflow will receive a message containing an object called <code>currentSurveyEvent</code> attached to the workitem in the survey. That object has the fields Call type and Data . Call type contains the name of the state you want to transition to and Data is an object containing the information passed to it.

Move To Survey

The Move to Survey action can change the survey from the current one to a specific one. It is sometimes useful when a survey needs to change language or when the workitem has changed department by transfer.

Configuration Fields

The Move to Survey action will have the following configuration fields:

Field Name	Description
Component Type	Move to Survey
Component Description	A description of the Move to Survey action.

Label	The component title.
Font size	The font size of the component title.
Height	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Padding	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Condition	A JavaScript expression for displaying the component. The survey component will show if the expression returns true.
Set Variables	Any variables to be set when the action is completed successfully.
User Survey	The survey to move to.
Entry Panel	The panel of the target survey to be presented first (first panel by default).
Style	Adds optional HTML and CSS styles to the action button.
Data Attached	The data to be attached to the User Survey.

Take Back

A take back occurs when an agent has been speaking to a customer and sends them into an automated function. The Takeback action disconnects the agent so they can watch the events panel to see where the customer is at in the function. The take back may bring the customer out of the IVR and back into a conversation with the agent.

Configuration Fields

The Take Back action will have the following configuration fields:

Field Name	Description
Component Type	Move To Survey
Component Description	A description of the Move To Survey action.
Label	The component title.
Font size	The font size of the component title.
Height	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Padding	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Condition	A JavaScript expression for displaying the component. The survey component will show if the expression returns true
Properties	Attach fields and values to the properties of the API call to retrieve the workitem on to the agent's screen.
Disposition	Disposition to be passed when the take back occurs.
Event Name	Event name that will instead trigger the take back.
Set Variables On Success	Variables to set on success, you may use this to create new variables or change values of fields in the survey when the API call is successful.
On Success	The action to be taken if the API call is successful.
On Success Panel	The panel to move to if the API call is successful and On Success is set to Move to panel.

Set Variables On Error	Variables to set on error, you may use this to create new variables or change values of fields in the survey when the API call fails.
On Error	The action to be taken if the API call fails.
On Error Panel	The panel to move to if the API call is unsuccessful and On Error is set to Move to panel.
Style	Adds optional HTML and CSS styles to the action button.

Transfer

After a dial or a dial-and-conference has been carried out, an agent may want to complete a transfer between the customer and a third party. This component will allow the agent to carry out warm and cold transfers to first-party or third-party systems or numbers. It is used together with the dial-and-conference actions detailed above.

Configuration Fields

The Transfer action will have the following configuration fields:

Field Name	Description
Component Type	Transfer
Component Description	A description of the Transfer action.
Label	The component title.
Font size	The font size of the component title.
Height	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Width	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Padding	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Margin	The desired size in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.

Condition	A JavaScript expression for displaying the component. The survey component will show if the expression returns true.
Properties	Attach fields and values to the properties of the API call to retrieve the workitem on to the agent's screen.
Transfer Type	The type of transfer desired: warm, cold, external
Recording	Where recording is applied on the transferred call. By default, the setting on the first party call will be passed.
Phone Expression	The field name of the phone that is to be transferred to.
Disposition	The disposition to be given to the first call which will be disconnected.
Event Name	The event name if the transfer is to be triggered via an event.
Set Variables On Success	Variables to set on success, you may use this to create new variables or change values of fields in the survey when the API call is successful.
On Success	The action to be taken if the API call is successful.
On Success Panel	The panel to move to if the API call is successful and On Success is set to Move to Panel.
Set Variables On Error	Variables to set on error, you may use this to create new variables or change values of fields in the survey when the API call fails.
On Error	The action to be taken if the API call fails.
On Error Panel	The panel to move to if the API call is unsuccessful and On Error is set to Move to Panel.
Style	Adds optional HTML and CSS styles to the action button.

Web Callback

The Web Callback action allows customers to request a callback through a web interface and schedule a time that is convenient for them.

NOTE: The callbacks are only presented when the agents are logged in and available.

Configuration Fields

The Web Callback action will have the following configuration fields:

Field Name	Description
Component Type	Web Callback
Component Description	A description of the Web Callback component.
Label	The component title.
Font Size	The font size of the component title.
Height	The height in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Width	The width in pixels or otherwise, following the CSS formatting rules. E.g., 180px.
Padding	The padding in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Margin	The margin in pixels or otherwise, following the CSS formatting rules. E.g., 4px, 8px or 0px, 0px, 0px, 4px.
Condition	A JavaScript expression for displaying the component. The survey component will show if the expression returns true.
Campaign	The campaign that you're using to perform the web callback.
Campaign Expression	If you're setting a campaign variable in the workflow, this is where you set the campaign expression to know which campaign to use. NOTE: Either use campaign or campaign expression, not both,
From	The phone number that will be used to perform the callback.
Phone Field	The field name where the customer will enter their phone number.
Date Field	The time and date when to place the callback entered by the customer using the calendar input.
Data Attached	The data you want is attached to the callback. Label and value pairs.
Set Variables on Success	Variables to set on success, you may use this to create new variables or change values of fields in the survey when the callback is successfully created
On Success	The action to be taken if the callback is successfully created. The options are Message, Move to Panel or None.

Success Message	A pop-up message displayed when the callback is successfully created.
On Success Panel	The panel to navigate to in the survey if the callback was successfully created.
Set Variables on Error	Variables to set on error, you may use this to create new variables or change values of fields in the survey when the callback creation fails.
On Error	The action to be taken if the callback creation fails. The options are Message, Move to Panel or None.
Error Message	A pop-up message is displayed when the callback is not successfully created.
On Error Panel	The panel to navigate to in the survey if the callback was not successfully created.
Style	Adds optional HTML and CSS styles to the action button.