

5.2 Using Contacts to Aid Conversations

Bright Pattern Documentation

Generated: 12/08/2021 5:06 pm

Content is available under license unless otherwise noted.

Table of Contents

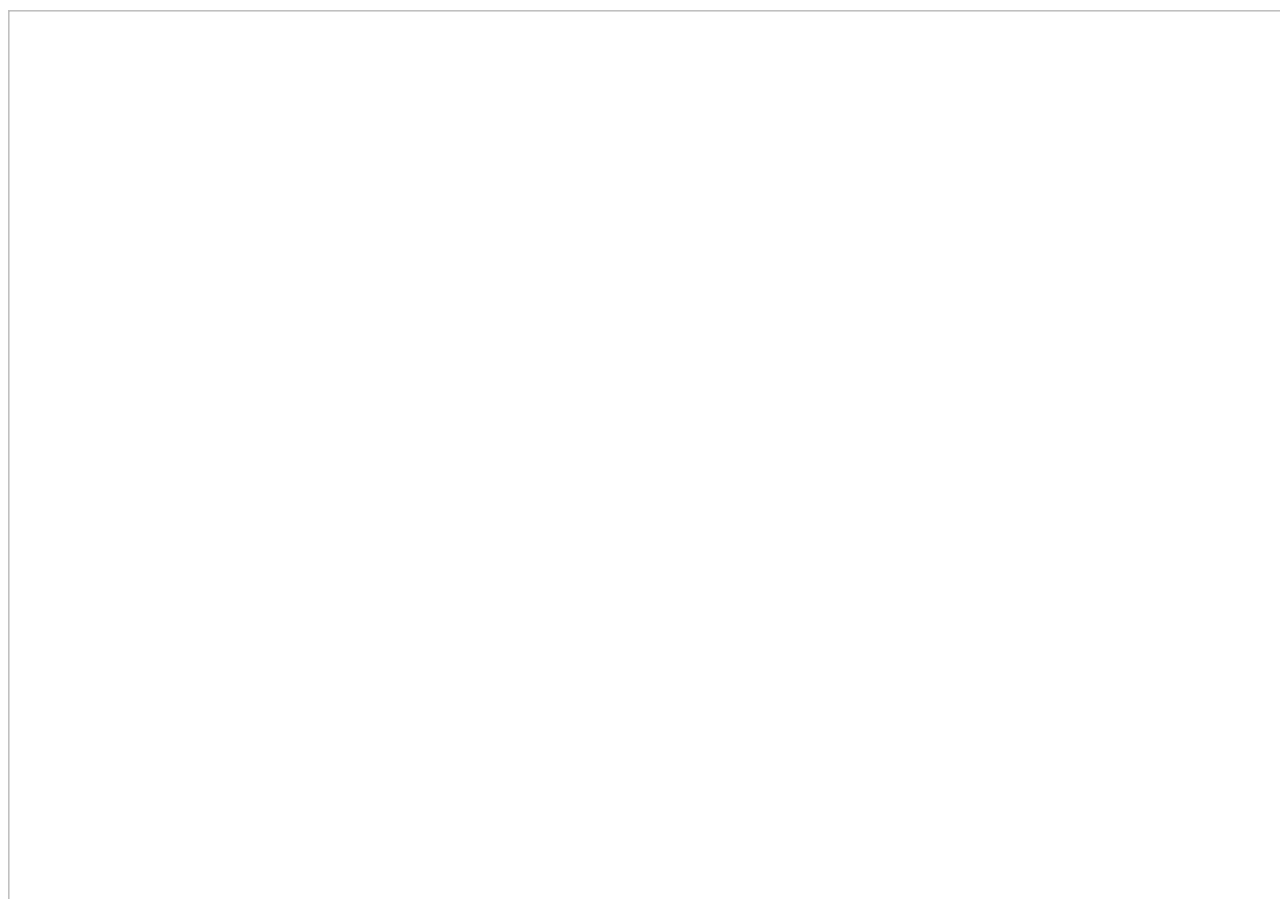
Table of Contents	2
General Information About Contacts	3
How to Access Contacts	3
Activities	4
Using Activities	4
Cases	5
Searching for a Case	6
Sending Follow-Up Emails from Cases	6
Details	7
How to Edit Contact Details	8
Augmentation	8
How to Wrap Up After Call Work	10

General Information About Contacts

One of Agent Desktop's many useful features is the *Contacts* section. From Contacts, you may quickly reference a wide variety of stored information. The Contacts section stores information about:


- A person's contact details
- Activity history
- Cases
- Call recordings
- Chat transcripts

All information is searchable, enabling you to look up records and contact information, even while handling an active conversation.



Agent Desktop Contacts section overview

How to Access Contacts

The Contacts section of Agent Desktop is accessed by clicking the Contacts icon  in the main menu.

Upon opening Contacts, you will first see the Search page, which allows you to search all stored contacts in your contact center. From there, you can do the following:

- Enter [Search](#) terms for quick lookup
- Open [Contact](#) details
- [Create](#) Create new contacts
- [Delete](#) contacts
- Browse [Cases](#)

Activities

The Activities tab stores the selected contact's records for all types of conversations (i.e., voice calls, emails, chats, SMS/text messages, Messenger interactions, etc.) that have been handled by your contact center. Activities are searchable, enabling you to access specific information quickly, even while handling an active interaction. Built-in contacts show records of all interactions and cases, if any, for the selected contact.

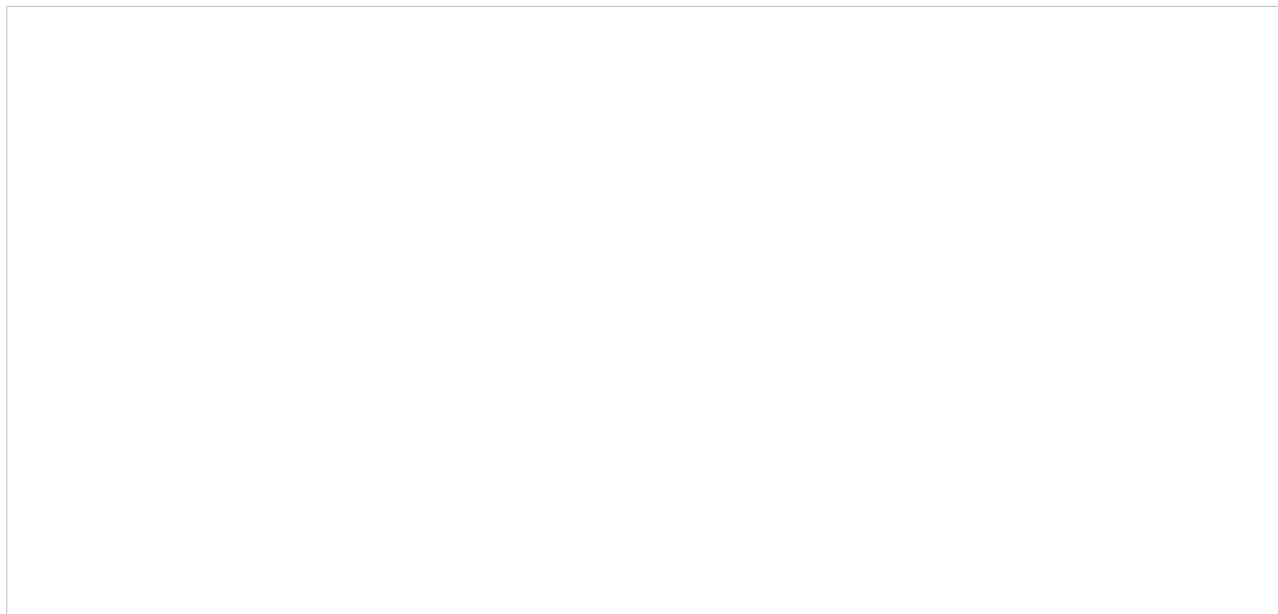
The Activities tab is accessed from contact details.



Activities tab is accessible from contact details

Using Activities

The Activity tab displays all activity history for a person. This includes voice calls, call transcripts, speech-to-text transcripts, chat interactions, chat transcripts, email messages, Messenger interactions, Messenger transcripts, SMS/text messages, notes from agents, and so forth.



Activities are shown for the selected contact

On the **left** side of the screen, you will see the records of all activities and interactions involving this contact in order by date, with the newest at the top of the list.

When you select a specific activity, the **right** side of the screen will display additional information. Depending on the interaction type and your privileges, you may also be able to review the associated interaction content, such as call recording or chat transcript.

Cases

The *Cases* tab is where you may search for cases associated with a selected interaction. Cases are useful as they keep track of not only the interactions, but also related notes from multiple agents, and any subsequent follow-up activities, all the while keeping the content available to anyone on your team.

By default, cases are emails; however, cases also may be created from chats or calls. Cases can be filtered by status (active or closed) or by additional filters; these filters are:

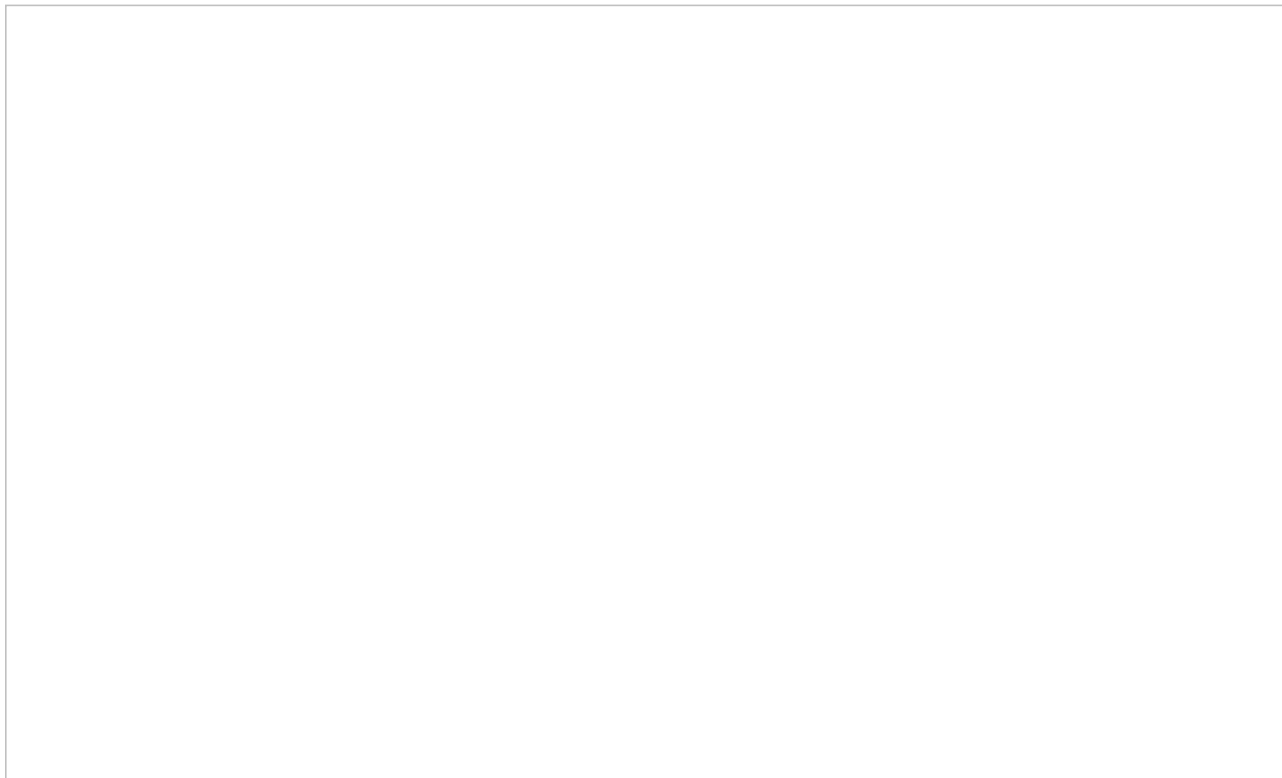
- Relevance
- Create time
- Update time
- Last customer update
- SLA Age %
- From
- Subject

- Flag

For additional information about creating cases, see the sections [Understanding Email Cases and Threads](#) and [How to Create a Case from a Chat Session](#).

Searching for a Case

To search for cases, use the search bar at the top of the contacts section; searching may take place while on active calls or chats. You may search for cases by name, case number, or case title. The results of the search will appear under the *Cases* tab of the [Contacts](#) section. Additionally, cases may appear as a tab in the *Selected Conversation's Documents* section if you are having an active conversation. If you have not sent an email from the case, it will be listed as *Active*; cases where a follow-up email was sent will be listed as *Closed*.



Search for cases in Contacts

Sending Follow-Up Emails from Cases

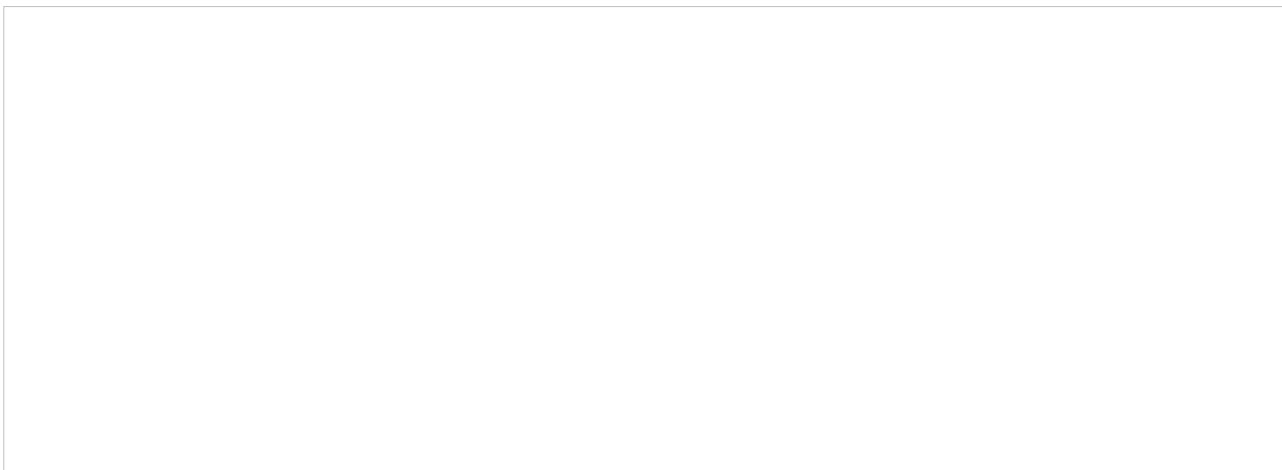
When selected, the case with the chat transcript will appear in the right panel; click the **Open** button at the bottom of the panel. From here, you will have the option to send the customer a follow-up email, flag it, or transfer the case to another agent. To transfer the case, click the **transfer** button. When an email is sent, it will be included in the case record.



Opening a case allows you to email the customer

Details

The Details page displays the contact details form for a selected contact. If information has already been saved for that contact, you will see that information on the form.



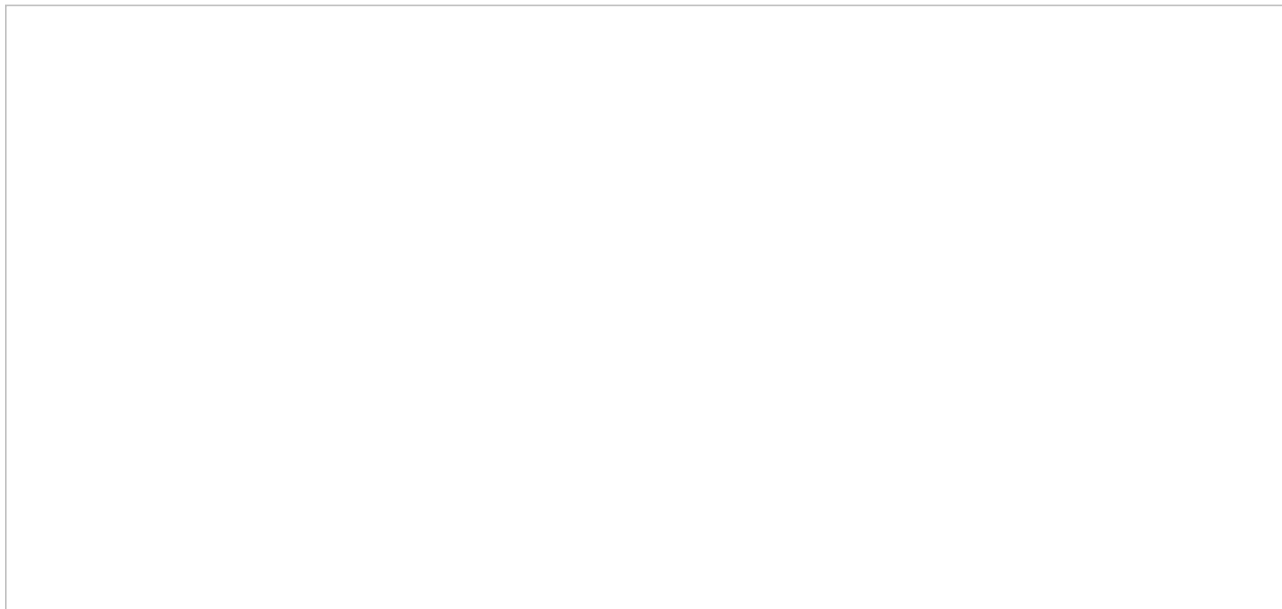
Contact Details

Contact details may include the following:

- Name
- Profile photo
- Phone numbers
- Email addresses
- Mailing address
- Company information
- Titles
- Website URLs
- Summary
- Other identifying information
- Tabs for accessing activity history, pending calendar appointments, and cases

How to Edit Contact Details

Information may be added to the form by clicking the **Edit** button. To save your changes, click **Save**.

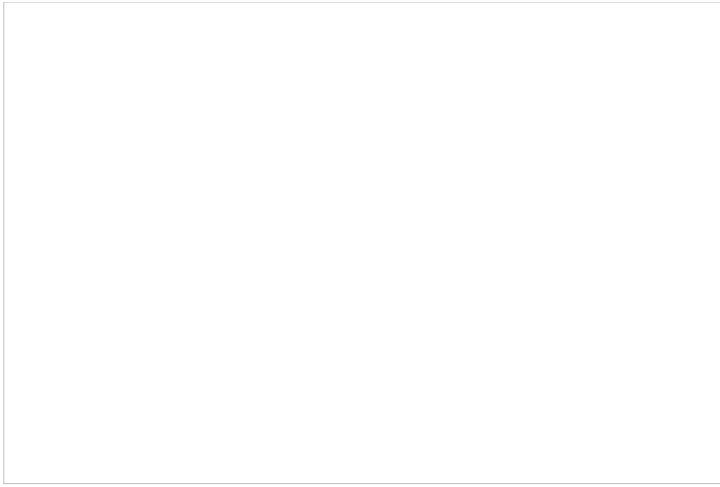


Editing contact details

Augmentation

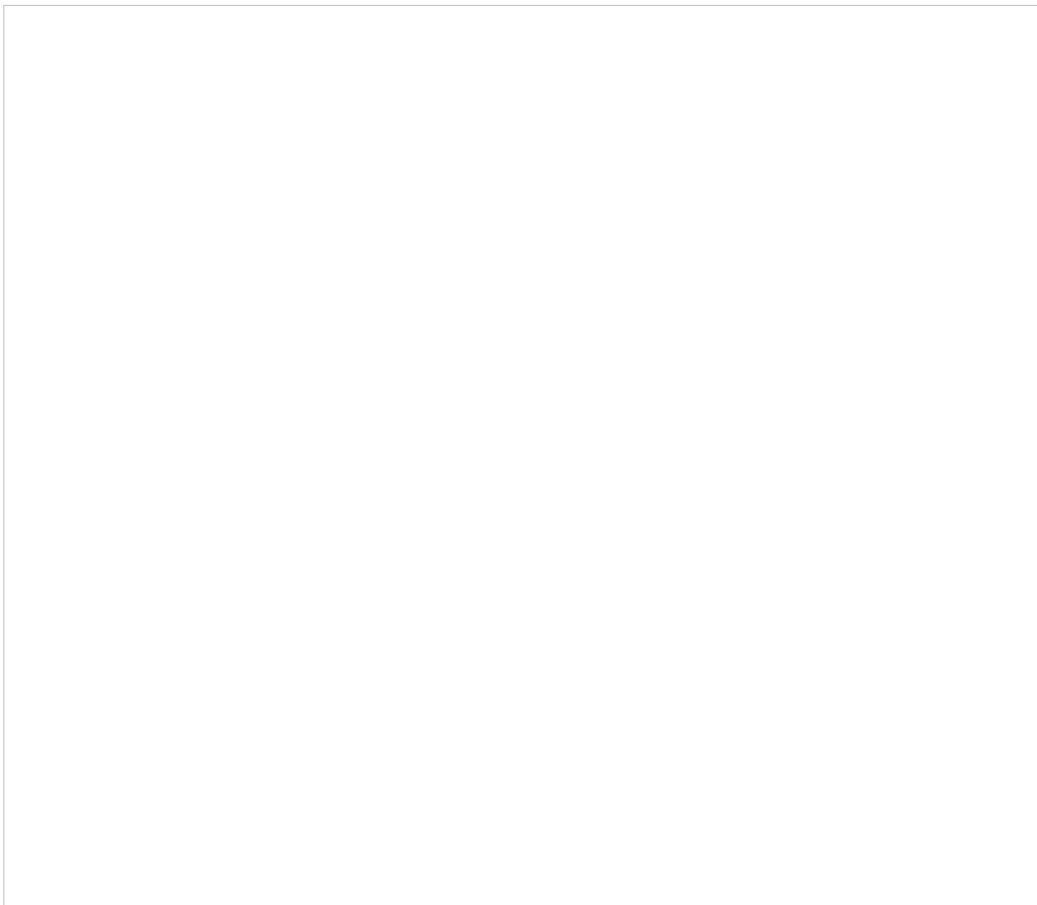
If data augmentation has been configured for your contact center, you will be able to populate contact details with data from data providers such as The Data Group or Next Caller. If this feature is enabled for your contact center, you will see the **Augment** button on the contact details Edit screen.

Click **Augment** to view available data that can be used in your contact details. If you wish you use the provided data, click **Use**.



Click "Use" to augment your data with the provided data

The following dialog will appear, asking you to confirm the data to be added to the contact details that you are editing.



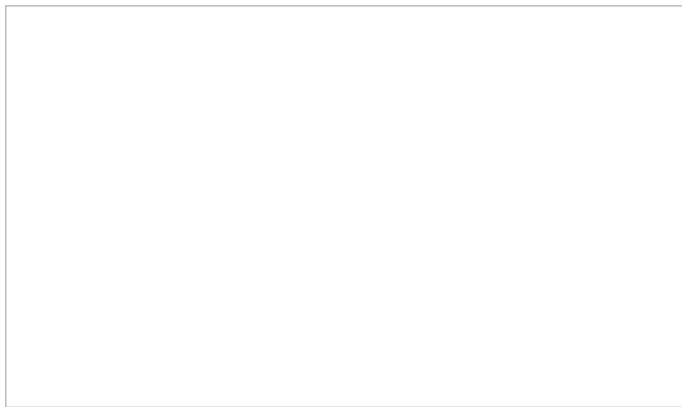
Augment Contact Data

How to Wrap Up After Call Work

Depending on the type of service you provide and your contact center practices, after a service interaction (call or chat) has terminated, the system may automatically change your state to [After Call Work](#) (ACW). You can use the time in this state to finish any work associated with the service interaction that has just ended.

After finishing the after call work for the current customer interaction, you have the following options:

- Click the **Complete** button . This will finish processing the current interaction. If this was the only interaction at your desktop, you will be automatically switched to the next state, which may be [Ready](#) or [Not Ready](#), depending on the system settings and/or the state you may have previously requested. However, if you have other active interactions at your desktop, you may remain in the *After Call Work* state and continue working on the other interactions. Thus, when you handle multiple interactions simultaneously, it is recommended that you use the **Complete** button to finish interaction processing in the *After Call Work* state.
- If you are ready to receive another service interaction, you can click the **User Status Indicator/Selector** and [select Ready](#) from the drop-down menu. You will be switched to the *Ready* state regardless of how many interactions you may have had at your desktop. Processing of all such interactions will be finished.
- If you wish to make yourself temporarily unavailable to receive new service interactions, click the **User Status Indicator/Selector** and [select Not Ready](#) (or a specific reason) from the drop-down menu. You will be switched to the *Not Ready* state regardless of how many interactions you may have had at your desktop. Processing of all such interactions will be finished.



Complete button

You may be required to enter a disposition before finishing interaction processing. For more information, see [How to Enter Dispositions and Notes](#).

Depending on the system settings, if you do not make yourself either *Ready* or *Not Ready* manually within the time allocated for after call work, the system may eventually switch you to the *Ready* or *Not Ready* state automatically.

Also, depending on your system settings, if there are other calls waiting in queue while you are in the *After Call Work* state, you may receive visual and audio notification of this fact.

Note: If you use a custom form in the *Context Information Area* for processing of data related to a specific call, the **Complete** button may appear on that form.

