

## 5.2 General Information About Contacts

### Bright Pattern Documentation

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# Search

The Contacts Search page allows you to search all stored contacts in your contact center, as well as manage contact entries, view contact details, navigate to activity history, and browse cases.

Clicking on any contact's name in the list of contacts will open the Details form for that contact, which displays all contact information available for that individual person.



Contacts Search

## How to Use Search

In the text entry field at the top of the screen, you can enter search terms for quick lookup of specific keywords found in stored contacts. If your search returns results, you will see a list of contacts that include the search term you entered.

Enter search term

## Managing Contacts

Buttons at the bottom of the Search page allow you to manage contacts.



- To create a new contact, click **Create**.
- To open contact details for a selected person, click **Open**.
- To delete a contact, click **Delete**.

## Accessing Cases

From the Search page, you can navigate to Cases by clicking the Cases tab at the top right of the page. Any stored cases that you have handled will be listed on the screen. You can sort and search cases.



Cases tab

To return to Contacts Search, click the Contacts tab.

## Searching Contacts and Cases

You may search contacts and cases for the following information.

### Company

Company names may be searched for either whole or in part; the search recognizes individual words. To search for a company by name, enter **company: XXX**. Note: XXX represents the name of the company.

### Date of Birth

You may search for the date of birth of a contact in your local date format. For example, in the US, the local date format is DD/MM/YYYY. To search for a specific date of birth, enter **dob: DD/MM/YYYY**.

### Email

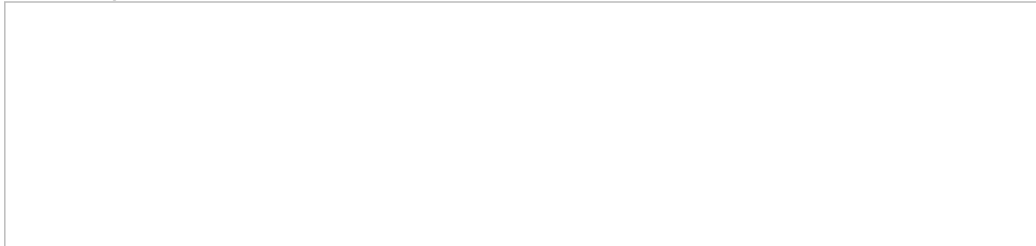
If you are familiar with a case or customer's email address, you may search for it. In the example shown, entering the complete email address in the search string input field returns all matches in the system. Additionally, entering the search tag **email: XXX**, will search email fields specifically. Note: XXX represents an email address.

# Ways to Access Contacts

On the Agent Desktop, there are many ways to display a contact's details.

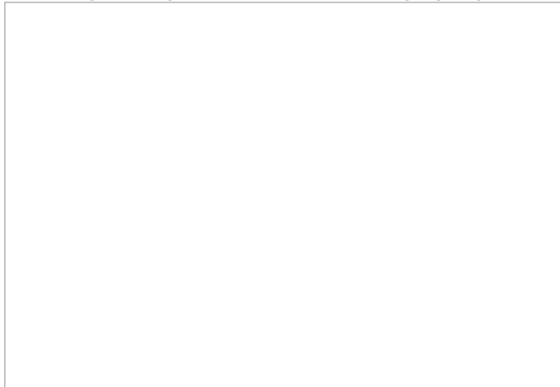
You can access contacts by

- Searching and opening a list of contact results (see Contact [Search](#), where the search combs all text and address/phone fields)



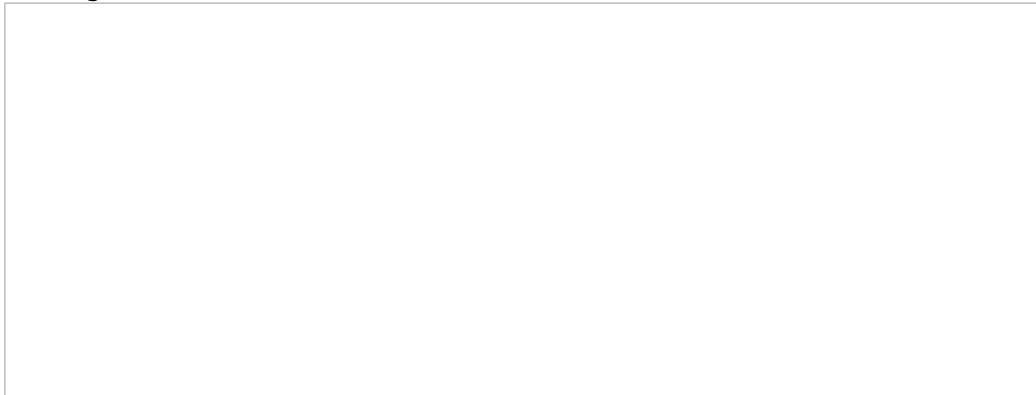
Contact Search results

- Clicking on a photo on a contact pop-up



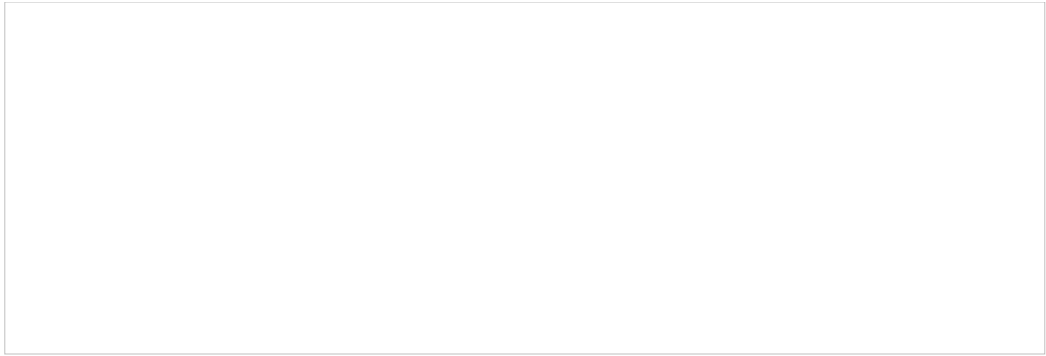
Clicking on a photo on a contact pop-up

- Viewing a case



Mousing over a contact's name from a case

- Clicking or mousing over the email address bar. Mousing over an email shows an email message icon to the right of it; clicking the icon creates a new email case with a new draft.



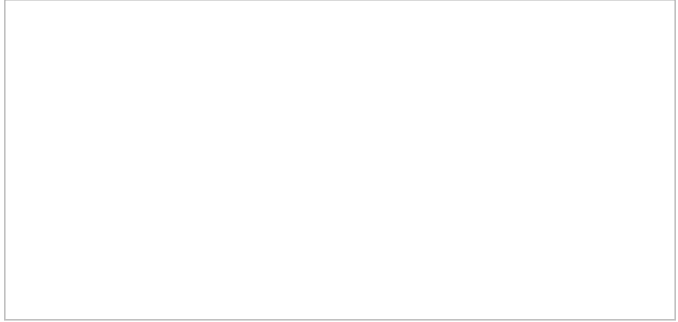
Mousing or clicking a contact's name in the email address bar

- Browsing the directory and recent conversations list and mousing over a person's name or a conversation. Mousing over a phone number shows the SMS message and phone icons; clicking on either creates a new call or SMS chat. If there is a conversation with this contact already, the chat or call is merged into that conversation.



Mousing over a contact's name in the directory

- Clicking on a photo on the top bar during a conversation



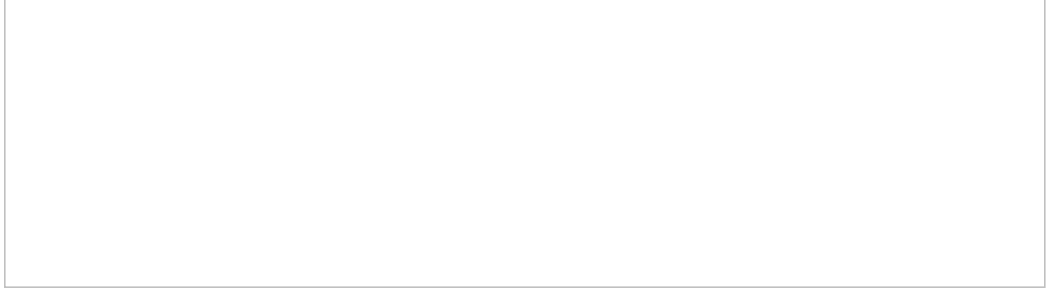
Mousing over a contact's name during a call

- Clicking on a photo in the calendar when an event has a linked contact



Mousing over a contact's name linked to a calendar event

- Entering a contact link in the Search input field



Using the Search input field

- Clicking or mousing over on a contact link in an internal chat



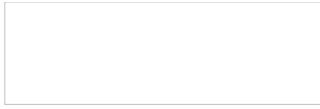
Clicking or mousing over a contact during chat

- Clicking on details presented to you in screen pop

## Presentation of Contact Details

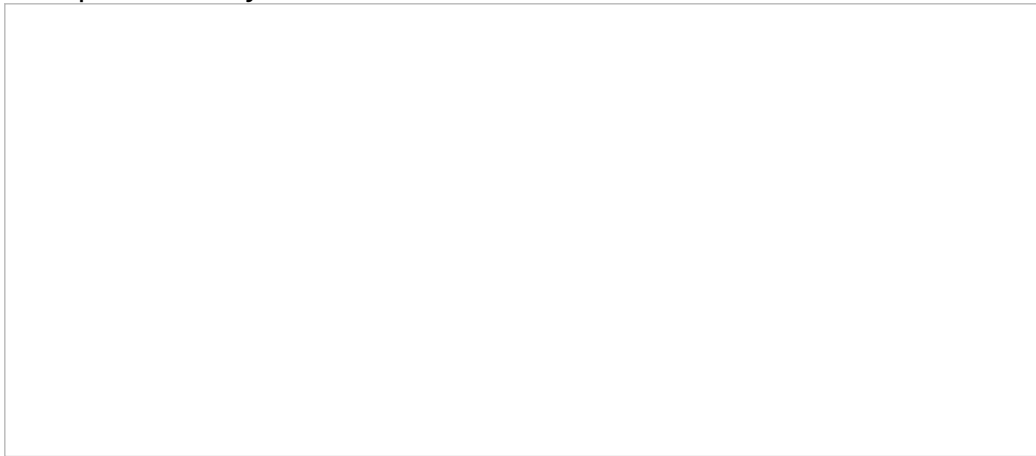
A contact's details are displayed as either a form or a list.

- A Summary form presents the summary of a contact, name, photo, and essential addresses.



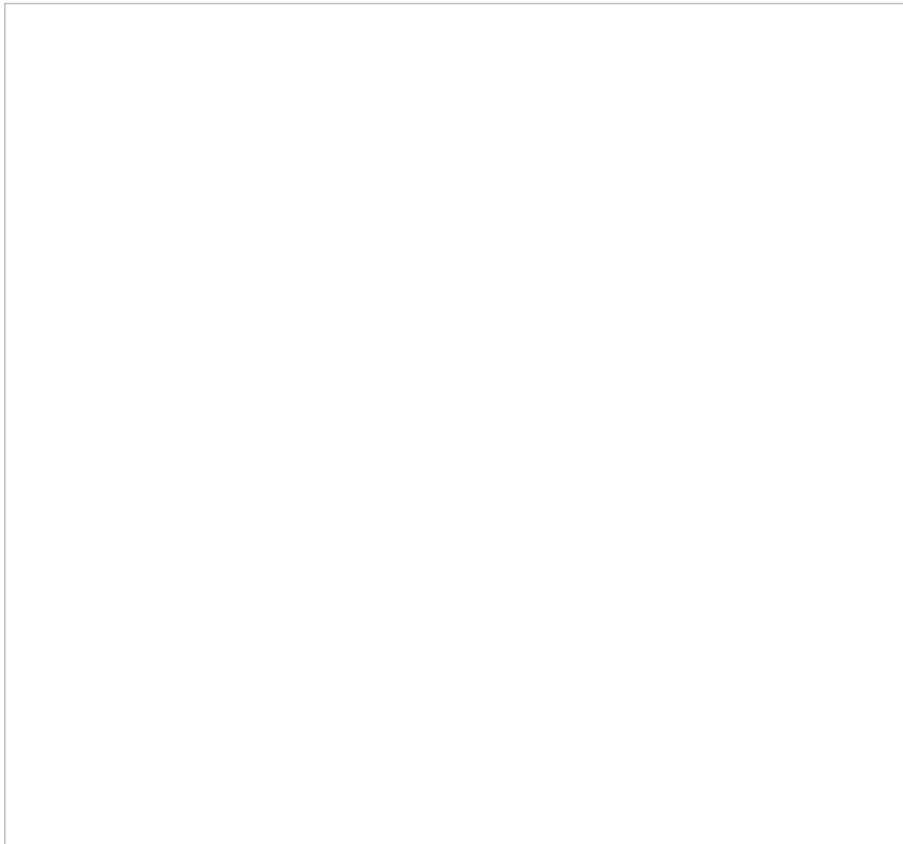
Contact details

- A Detail form includes the same information as the Summary form, plus other detailed information, such as description, birthday, and so forth.



Contact details

- The list of pending items shows cases and calendar events.
- The list of associated completed activities shows all finished activities/interactions that are associated with the contact.
- The list of associated cases shows all cases/emails associated with the contact.



List of cases

The contents of forms can be edited by clicking the **Edit** button.



# How to Create a New Contact

There are several ways to create a new contact (i.e., add a new record) in Agent Desktop. You can enter details for a new contact manually via the Contacts search results, or you can add a new record quickly from a number of contact summary pop-ups. The ways to create a new contact are described as follows.

## Search Results

1. On the Contacts Search results list, click the **Create** button at the bottom of the screen.



Filling in the contact Details form

2. The Contact Details form will open, and from there, you can enter all contact information.

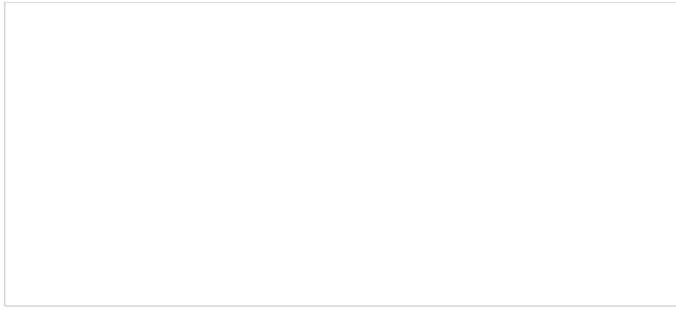


Filling in the contact Details form

3. Click **Save**.

## "Add New" Option on Contact Pop-Up

1. On the Active Conversations List, click the *Recent* tab.
2. Hover your mouse cursor over the contact's name.
3. If no details have been saved for that contact, the contact summary pop-up will provide links labeled *new contact* and *add to existing*.



Click "new contact"

4. Click **new contact**.
5. The *Add New Record* pop-up will appear with four basic fields to complete: name, phone extension (which may be pre-filled for you), email, and photo.

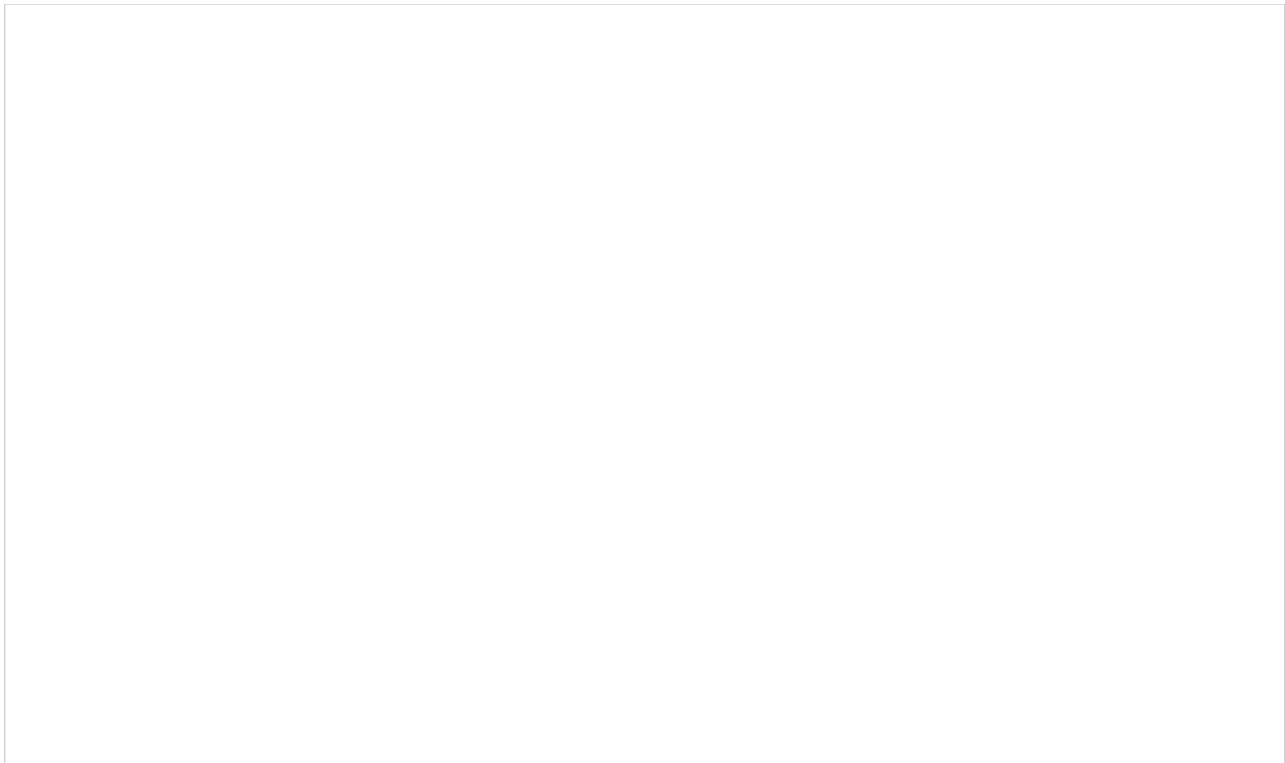


Add New Record

6. Click **Create** to create a simple record quickly, or click *Add and Edit* to add more information to an existing contact.

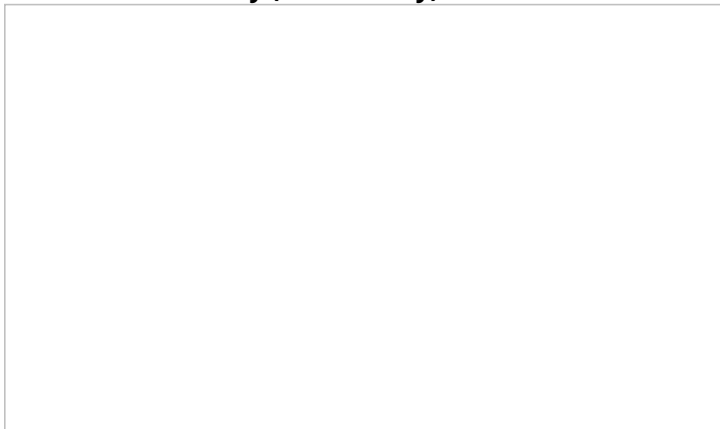
## Calendar

1. On your calendar, add a new event.
2. Click the + sign at the bottom of the pane where you edit event details. The + sign allows you to assign a contact to the event.



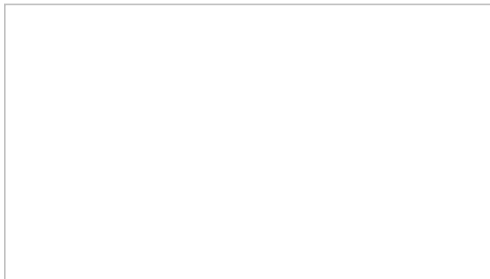
Assign a contact to a calendar event

3. Click **Enter manually (or directory)**.



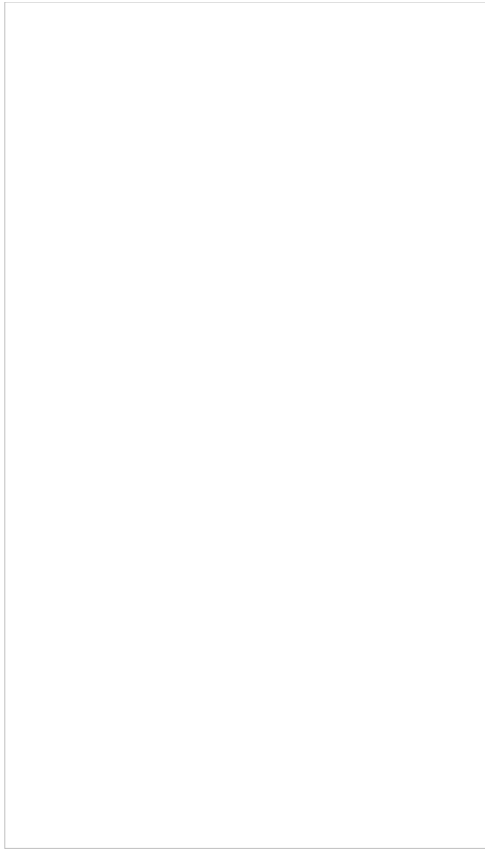
Assign a new contact by typing in the name

4. Enter the name of the new contact and select the checkbox for **create contact**.



Type in the name of your contact

5. At the top of the pane, click **Save**. If you do not save the event details, your new contact will not be created.



Save details

## How to Edit to an Existing Contact

After a contact has been added, it may be necessary to add to or change the listed information. **Note:** In order to edit a contact's information, the privilege must be enabled by your contact center administrator.



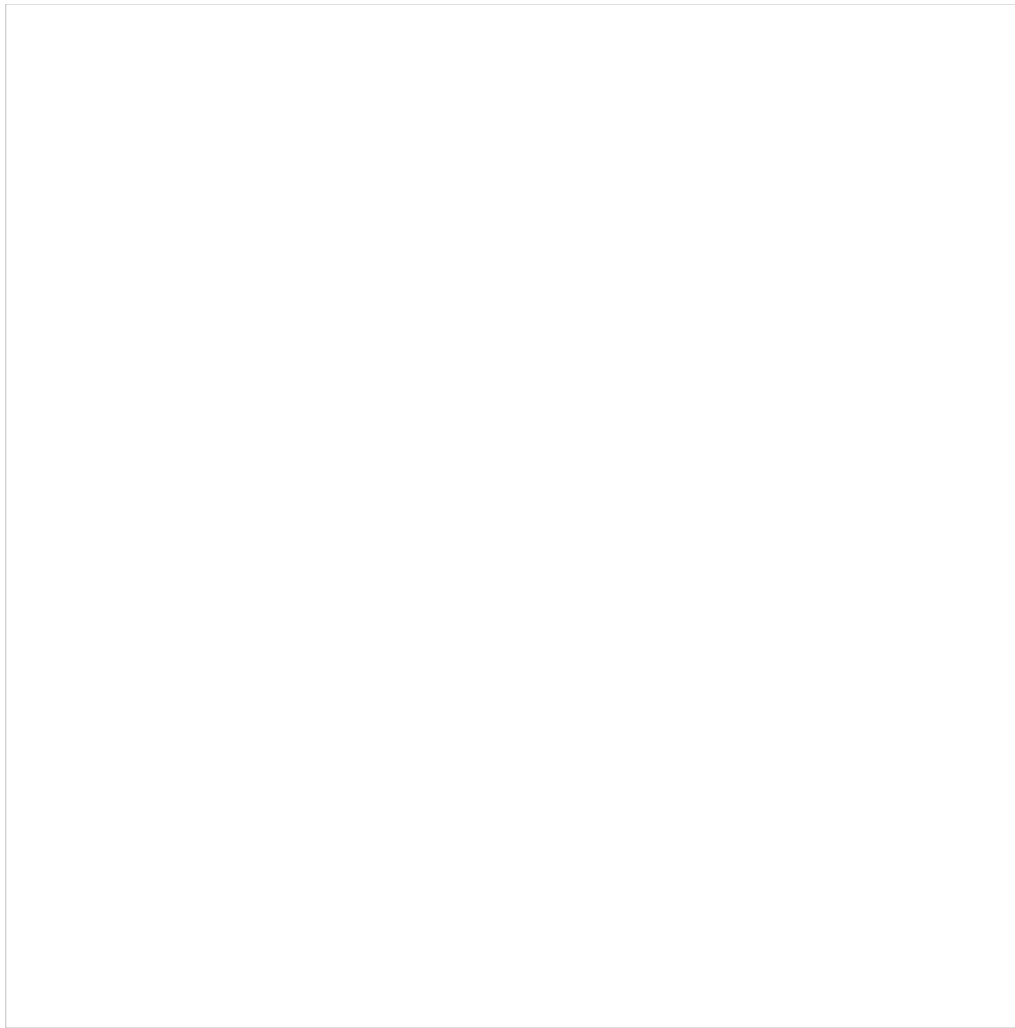
## Editing an existing contact's information

To edit an existing contact's information, follow these steps:

1. Go to the *Contacts* section.
2. In the *Contacts* tab, find the contact that needs editing.
3. To view the contact's information, either double-click on the contact name or highlight it and click the **Open**  button.
4. After opening the contact's information, click **Edit**  to add to or remove information.
5. When you are finished editing the contact's information, click **Save** .
6. If you made edits to a contact's information but do not want to save them, click **Cancel** .

## Contact Augmentation

If your contact center is integrated with an external database (e.g., NextCaller), it is possible to merge matching customer contact information through augmentation. Note the setting that allows augmentation must be configured by your administrator in order to work.

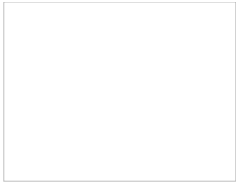


When augmenting a contact, choose which information to merge in Agent Desktop

To augment an existing contact's information, follow these steps:

1. Go to the *Contacts* section.
2. In the *Contacts* tab, find the contact that needs editing.
3. To view the contact's information, either double-click on the contact name or highlight it and click the **Open**  button.
4. After opening the contact's information, click **Augment**  and a directory will open.
5. Click the boxes next to the information you wish to merge into Agent Desktop; you may choose to import all contact information from another site (e.g., LinkedIn) or only specific fields (e.g., Name, Email, etc.).
6. After selecting the information, click **OK** .
7. If you do not wish to proceed with the augmentation, click **Cancel** .

**Note:** If you do not have an integrated external database and click **Augment**, a small pop-up window will display the message, "No data."



No integrated  
database message

## 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.

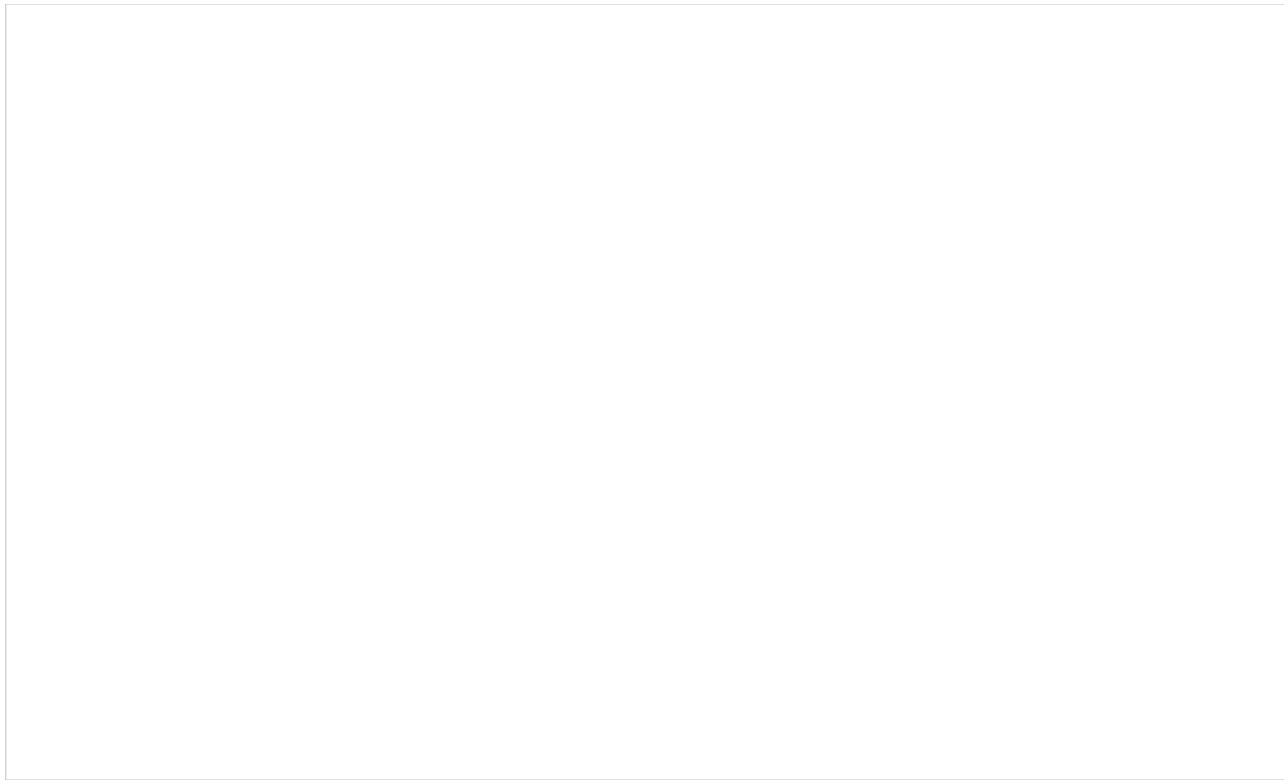
By default, cases are emails; however, cases also may be created from chats or calls. Cases can be filtered by status (active or closed) or by additional filters; these filters are:

- 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