

5.2 Ways to Access Contacts

Bright Pattern Documentation

Generated: 12/08/2021 4:55 pm

Content is available under license unless otherwise noted.

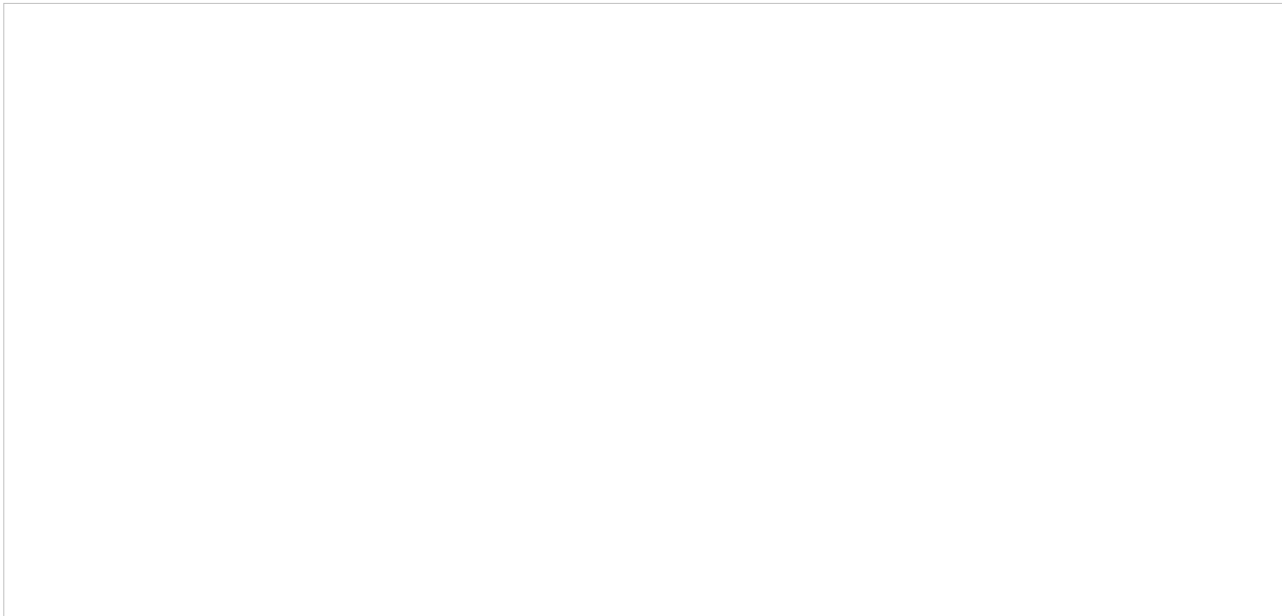
Table of Contents

Table of Contents	2
Search	3
How to Use Search	3
Managing Contacts	3
Accessing Cases	4
Searching Contacts and Cases	4
Company	4
Date of Birth	4
Email	4

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.

A rectangular button with a thin black border and the text "Cases tab" in blue, positioned at the top right of the page.

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.

