

5.3 Search

Bright Pattern Documentation

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Search Tutorials

Agent Desktop's Search and Preview Records section, formerly known as *Contacts*, contains the [search bar](#) that allows you to look up contacts, cases, and much more. Search tutorials will show you how to use Agent Desktop's search bar as well as shortcuts to access case and contact information.

For more information, see [Search and Preview Records Overview](#) as well as our [Contacts tutorials](#).

Articles

- [How to Conduct Advanced Searches](#)
- [Using URL Variations to Access Case and Contact Information](#)

Advanced Search

As you work with more customers and fulfill their requests, you will accumulate an extensive collection of cases and contacts. Utilizing advanced search features, you can search through your customer information easily in any language.

Note the privilege to search cases and contacts must be enabled by your contact center's administrator.



Search strings are typed into the search field

Where to Make Advanced Searches

Advanced searches are made in Agent Desktop, section [Search & Preview Records](#), in the **search term** field. You can search for a wide variety of case and contact information including email addresses, names, date of birth, case numbers, email addresses, and so forth. In the search results, the first 200 cases/contacts are displayed, with the newest entries displayed first.

About Search Strings and Keywords

Search strings are any combination of letters, characters, and numbers entered in the search field with the intent of finding matching information. Search strings are used in conjunction with keywords to conduct advanced searches.

Keywords are words that precede search strings and act as filters to help you find specific kinds of content quickly.

Operators such as AND and OR allow you to combine multiple search conditions. For examples, see the "How to use it" and "Example search" notes for each keyword below.

Available Keywords

The following is a list of recognized keywords; they are organized by either case or contact.

Case Keywords

category

What it does: The *category* keyword filters cases by category.

How to use it: The search string can be enclosed in double quotes; however this is optional. Without double quotes, only the first word will be associated with the keyword's search.

Example search: *category: "My Team's Service"*

created

What it does: The *created* keyword filters cases by creation date.

How to use it: The keyword and search string can be separated by the following: =, <, >, >=, <=; the search string shall correspond to the most preferred language/country combination set in your browser. For example, if your preferred combination is *English (United States)*, the expected format will be *mm/dd/yyyy*, whereas for *English (New Zealand)* it will be *dd/mm/yyyy*. The ISO 8601 date format *yyyy-mm-dd* is supported for all language/country settings.

Example search:

- *created = 08/01/2018*
- *created > 8/1/2018*
- *created > 8/1/2018 AND created < 8/16/2018*

email_text

What it does: The *email_text* keyword finds text contained within the body of an email associated with a case.

How to use it: The search string may be enclosed in double quotes (optional) but it is recommended for multi-word searches; without double quotes, the search will use only the first word after the keyword.

Example search: *email_text: "broken on arrival"*

flagged

What it does: The *flagged* keyword filters cases that were flagged

How to use it: The search string can contain the following option: "true" or "false"

Example search: *flagged: true | false*

modified

What it does: The *modified* keyword filters/sorts cases by the last date of modification.

How to use it: Same as [created](#) (see above)

Example search:

- *modified > 08/01/2018*
- *modified > 8/1/2018*
- *modified > 8/1/2018 AND modified < 8/16/2018*

<number>

What it does: The *number* search finds cases by case number; note that the option to search by number does not require the specific keyword *number*.

How to use it: Entering a search string consisting only of numbers will launch a search for the matching case number.

Example search: *12345*

note

What it does: The *notes* keyword finds text contained in the notes records from a case's activity history.

How to use it: The search string may be enclosed in double quotes (optional) but it is recommended for multi-word searches; without double quotes, the search will use only the first word after the keyword.

Example search: *note: "Replacement requested"*

pending_reason

What it does: The *pending_reason* keyword filters [Pending](#) cases by the specific Pending reason; note that these will be specific to your call center.

How to use it: The search string can be enclosed in double quotes; however, this is optional. Without double quotes, only the first word will be associated with the keyword's search.

Example search: *pending_reason: "Needs manager approval"*

reporter

What it does: The *reporter* keyword filters cases by the name of the customer/ person who contacted your call center.

How to use it: The search string should be enclosed in double quotes. Without double quotes, the search will use the first two words after the keyword. If more than two words are typed in double quotes, the search is split on the first space and will match the rest against the last name. Note that partial names can be entered as well (e.g., name: J D).

Example search: *reporter: "John Doe"*

service

What it does: The *service* keyword filter cases by the services of interactions associated with the case.

How to use it: The search string may be enclosed in double quotes (optional) but it is recommended for multi-word searches; without double quotes, the search will use only the first word after the keyword. Additionally, you may include the Boolean operator *AND* followed by an additional search term; this will find all emails and cases that contain the additional search term in the subject and/or body and are assigned to the service.

Example search: *service: "Maintenance Renewal" AND subscription*

state

What it does: The *state* keyword filters cases by their states.

How to use it: The keyword and search string should be separated by a colon (:); multiple values can be separated by OR. **Note that in the current version state is case sensitive.**

Example search: *case: New OR Open*

subject

What it does: The *subject* keyword finds text contained in an email's subject line.

How to use it: The search string may be enclosed in double quotes (optional) but it is recommended for multi-word searches; without double quotes, the search will use only the first word after the keyword.

Example search: *subject: "forgot password"*

Contact Keywords

address

What it does: The *address* keyword filters contacts by the contact record fields associated with address; the recognized fields are the following: address line 1 or address line 2, city, state/province, and postcode

How to use it: The keyword and search string should be separated by a colon (:)

Example search: *address: 123 Fake St.*

company

What it does: The *company* keyword finds contacts with a matching company name.

How to use it: The keyword and search string should be separated by a colon (:) and the search string can be enclosed in double quotes. Note that partial names can be entered.

Example search: *company: "Warehousing Inc"*

dob

What it does: The *dob* keyword finds contacts with a matching date of birth.

How to use it: The keyword and search string should be separated by a colon (:). Also, the month-date versus date-month order should be specific to your country (e.g., mm/dd/yyyy for the US).

Example search: *dob: 07/30/1983*

email

What it does: The *email* keywords finds contacts with a matching email address.

How to use it:

- Use **email:** filter, followed by the desired part of the email address, to search for any part of an email address (e.g., **email:masha**). A search for "email:ma" could return results such as "example@gmail.com," "masha@example.com," and so forth.
- Include the "@" symbol to find email addresses (e.g., **masha@**).
- Put the email address in quotes to find only complete email addresses (e.g., "**masha@gmail.com**"). These email addresses can be in the email address fields or anywhere else in text, such as in the email body, the subject line, or in notes.
- Enter the email address without quotes to get the widest possible search (e.g., **masha@gmail.com**). Without quotes, the search treats periods and the "@" sign as whitespace. Without quotes, the search splits the email address into individual words and tries to find emails/cases with the most matching words. Such a search, for example might even bring up another contact's email because some matching words appeared in the case history.
- Place an asterisk (*) in front of partial email addresses to search for matches (e.g., ***masha@**). The asterisk serves as a wildcard.

Example search: *email: john@doe.com, email:john, john@, "john@doe.com", john@doe.com, *john@*

first_name

What it does: The *first_name* keyword finds contacts with a matching first name.

How to use it: The keyword and search string should be separated by a colon (:). Note that partial names can be entered.

Example search: *first_name: John*

last_name

What it does: The *last_name* keyword finds contacts with a matching first name.

How to use it: The keyword and search string should be separated by a colon (:). Note that partial names can be entered.

Example search: *last_name: Doe*

name

What it does: The *name* keyword finds contacts with a matching first and last name.

How to use it: The keyword and search string should be separated by a colon (:). The search string should be enclosed in double quotes. Without double quotes, the search will use the first two words after the keyword. If more than two words are typed in quotes, the search is split on first space, matching the rest against the last name. Note that partial names can be entered as well (e.g., name: J D).

Example search: *name: "John Doe"*

phone

What it does: The *phone* keyword finds contacts with a matching phone number.

How to use it: The keyword and search string should be separated by a colon (:).

Example search: *phone: (415) 555 1212*

position

What it does: The *position* keyword finds contacts with a matching position.

How to use it: The keyword and search string should be separated by a colon (:). Note that partial words can be entered.

Example search: *position: Engineer*

segment

What it does: The *segment* keyword finds contacts with a matching segment.

How to use it: The keyword and search string should be separated by a colon (:). Note that partial words can be entered.

Example search: *segment: gold*

title

What it does: The *title* keyword finds contacts with a matching title (e.g., Mr., Mrs., Miss).

How to use it: The keyword and search string should be separated by a colon (:).

Example search: *title: Mr.*

URL


What it does: The *URL* keyword finds contacts with a matching company URL.

How to use it: The keyword and search string should be separated by a colon (:). A substring can be typed (i.e., "example" must match "www.example.com"). Note that the keyword is not case specific.


Example search: *url: "www.example.com"*

Using URL Variations To Access Case and Contact

Information

In [Search & Preview Records](#), you may notice the *link* button . This button copies the URL of [case](#) or [contact](#) information to the clipboard, making it possible for you to paste and share the URL with other agents or supervisors in your contact center.

It is possible, however, to bypass using the link button and instead manually enter the same URL information or variations of it; manually entering such information may allow you to access more specific case and contact information.

The following is a list of recognized URL variations that may be manually entered to allow you access to specific case and contact information. URLs may be entered into your web browser's search bar, into the [search bar](#), or the Contact Search  shortcut found at the top of the screen to access the case.

Cases URL Variations

If using the [cases link button](#), the pasted URL will be presented in the format `<domain>/agentdesktop/case/id/<actual id number>` (e.g., `http[s]://YourCompany.brightpattern.com/agentdesktop/case/id/5ca2f3eed04fd756afcca6c6`).

The following is a list of recognized URL variations that may be manually entered to access case information:

- `<domain>/agentdesktop/case/number/<case number>` (e.g., `http[s]://YourCompany.brightpattern.com/agentdesktop/case/number/1099`)
- `<domain>/agentdesktop/case/<case number>` (e.g., `http[s]://YourCompany.brightpattern.com/agentdesktop/case/1099`)

If case links are pasted in internal chats, they may be displayed in the following formats for the most compact view:

- `case/id/<id>` (e.g., `case/id/5ca2f3eed04fd756afcca6c6`)
- `case/number/<case number>` (e.g., `case/number/1099`)
- `case/<case number>` (e.g., `case/1099`)

Contact URL Variations

If using the [contacts link button](#), the pasted URL will be presented in the format `<domain>/agentdesktop/contact/id/<id number>/<tab within case>` (e.g., `http[s]://YourCompany.brightpattern.com/agentdesktop/contact/id/5c6dad9d04fd75a777bdcfa/details`).

The following is a list of recognized URL variations that may be manually entered to access contact information:

- `<domain>/agentdesktop/contact/id/<id>/<optional tab within case>` (e.g., `http[s]://YourCompany.brightpattern.com/agentdesktop/contact/id/5c6dad9d04fd75a777bdcfa`)
- `<domain>/agentdesktop/contact/currentcontact/<details|activities|pending|cases>` (e.g., `http[s]://YourCompany.brightpattern.com/agentdesktop/contact/currentcontact/details`)

If contact links are pasted in internal chats, they may be displayed in the following formats for the most compact view:

- `contact/id/<id>` (e.g., `contact/id/5c6dad9d04fd75a777bdcfa`)

