# 5.3 Search & Preview Records Interface

## Bright Pattern Documentation

Generated: 6/19/2021 4:32 pm

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# Contact Import & Export

*Contact Import & Export* is where you are able to import, export, and delete bulk contacts for use in Agent Desktop. Note that this section replaces and removes the *Bulk Export/Import Contacts* feature from the Agent Desktop [Search & Preview Records](#) screen. Note that contact information [may be retrieved](#) via the Scenario Builder's application's [Bright Pattern Search Object](#) block.
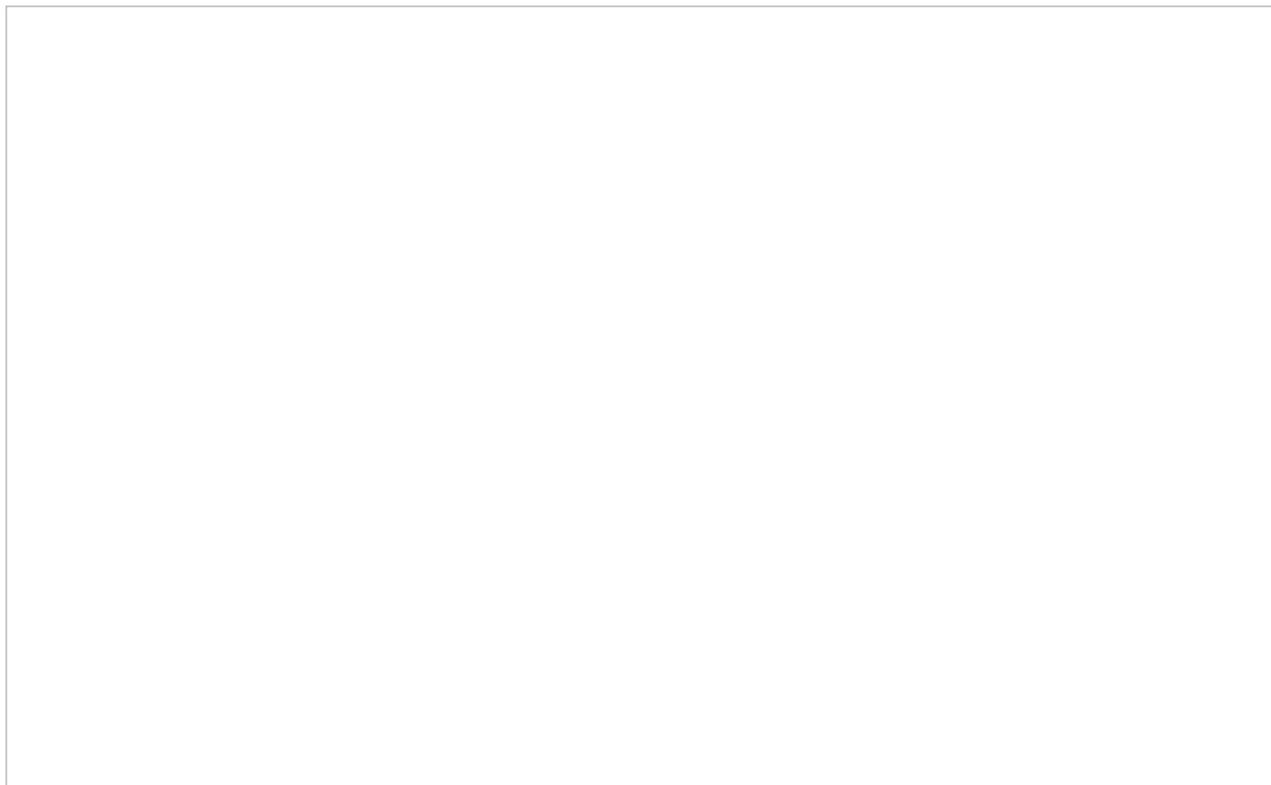


Contact Import & Export

## Contact Import & Export Tab

The *Contact Import & Export* tab is where you may initiate import, export, and deletion of bulk contacts. Additionally, the total number of contacts currently in your database is listed here.

### Import

The **Import** option allows you to upload bulk contacts through an import dialog window.

Import dialog window

## Name and Source Tab

**Data Source**

*Data Source* allows you to select from the following options.

**Upload**

This option allows you to upload a .TXT or .CSV file.

**FTP or SFTP**

This option allows you to select either **FTP** or **SFTP** and then enter the access URL.

**Username**

This is the username of the FTP or SFTP site.

**Password**

This is the password of the FTP or SFTP site.

**List format**

If you previously saved a list format, you may choose to import your contacts in this format.

## Format Options Tab

The *Format Options* tab allows you to customize the format of your import records.

Import Format Options tab

**File Input Encoding**

**First line contains field names**

When enabled, this checkbox will recognize the first line or row of your upload as the names of the contacts fields.

**Input file encoding**

This option allows you to select the encoding for your import file; select the encoding type from the drop-down menu.

**Field separator options**

The field separator options are as follows: **Comma**, **Tab**, **Semicolon**, and **Custom.**

## Fields Tab

The fields selector maps the fields from the import source to fields of contact and company objects. If your import source does not contain fields currently recognized in the database, this selector allows you to map them as needed. When you select a field in the field map, the following information will display.

Import Fields tab

**Selected field**

This is the field you have selected.

**Mapped to**

The *Mapped to* menu displays where the selected field is currently mapped to. To change where the field is mapped to, select a new field from the menu.

**Save new list format as**

After mapping your import fields, the *Save new list format as* dialog window will pop up. From here, you will have the option to save this import as a new format list. Note your import will not be affected if you choose not to save a new list format.
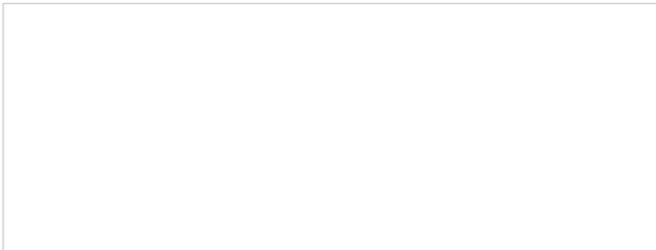


Save new list format as dialog window

**Results Tab**

The *Results* tab displays the results from the attempted import as the following.

Import Results tab

- **Records read** - The number of records read
- **Contacts created** - The number of contacts created
- **Contacts updated** - The number of contacts with updated information
- **Companies created** - The number of companies created
- **Errors detected** - The number of errors detected in the attempted import

**Note**: If your import contains errors, you will be able to download a .CSV file listing the errors.

## Export

The **Export** action allows you export contacts from your database in two ways:*All Contacts* or *Modified since*.

Note that you may choose the **Export** action to download a template of what the current contact and company fields are.
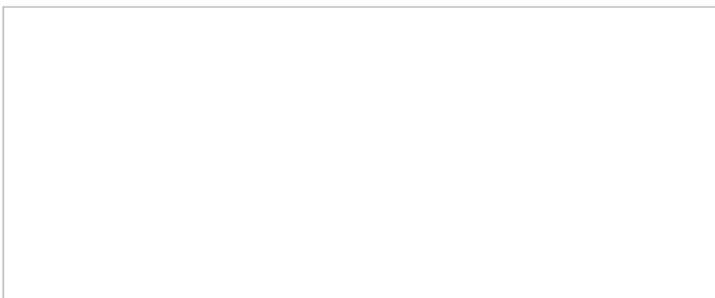
Export dialog window

**All Contacts**

The *All Contacts* option will export all contacts in your database.

**Modified since**

The *Modified since* option allows you to export contacts that have been modified from a set date; you may select the date in the calendar.

# Delete

The **Delete** option allows you to remove bulk contacts from your database through a dialog window similar to the one for *Import*. The *Name and Source*, *Format Options*, and *Results* tabs are the same as those for the import dialog; however, the *Fields* tab determines how you match contacts in a .CSV file with contacts in the database. Additionally, when you delete contacts, you may delete/update other objects.
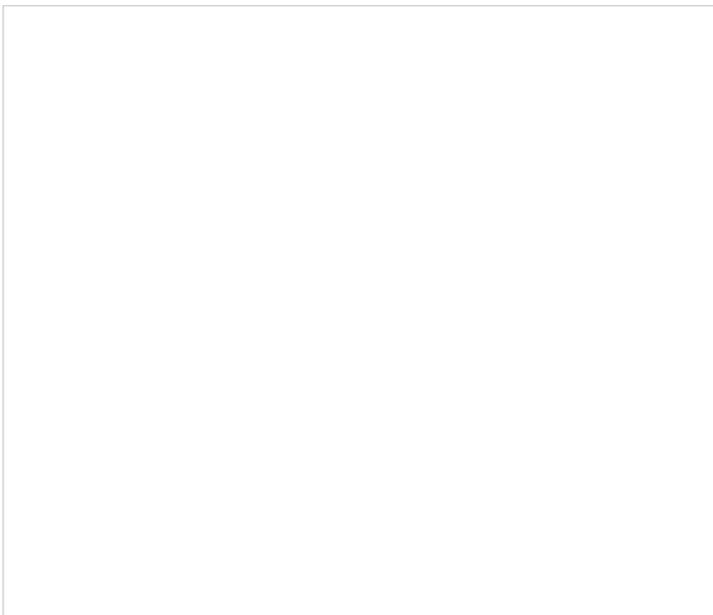
Delete dialog window

**Name and Source Tab**

**Data Source**

*Data Source* allows you to select from the following options.

**Upload**

This option allows you to upload a .TXT or .CSV file containing the records you wish to delete.

**FTP or SFTP**

This option allows you to select either **FTP** or **SFTP** and then enter the access URL.

**Username**

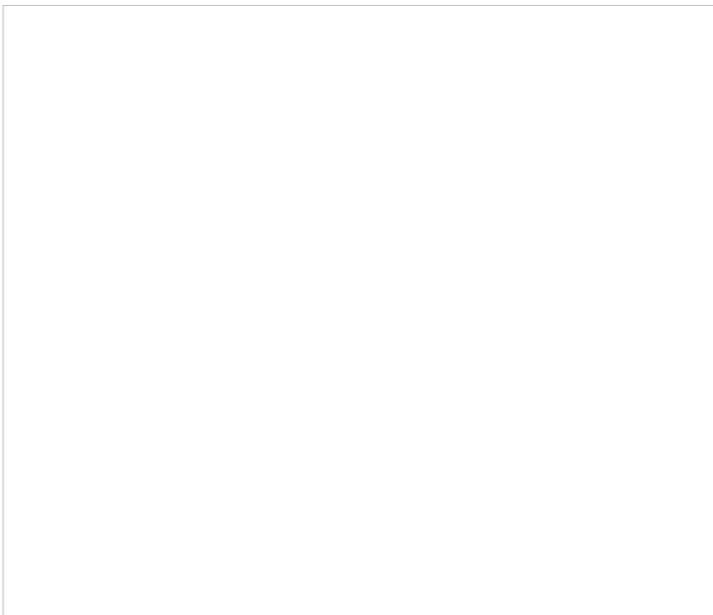This is the username of the FTP or SFTP site.

**Password**

This is the password of the FTP or SFTP site.

**List format**

If you previously saved a list format, you may choose to delete your contacts in this format.

## Format Options Tab

The *Format Options* tab allows you to customize the format of your delete records.

Delete Format Options tab

**File Input Encoding**

**First line contains field names**

When enabled, this checkbox will recognize the first line or row of your upload as the names of the contacts fields.

**Input file encoding**

This option allows you to select the encoding for your delete file; select the encoding type from the drop-down menu.

**Field separator options**

The field separator options are as follows: **Comma**, **Tab**, **Semicolon**, and **Custom**.

**Fields Tab**

The *Fields* tab determines how you match contacts marked for deletion in a .CSV file with contacts in the database. Additionally, when you delete contacts, you may delete/update other objects.

Delete Fields tab

**Selected field**

This is the field you have selected.

**Mapped to**

The *Mapped to* menu displays where the selected field is currently mapped to. To change where the field is mapped to, select a new field from the menu.

**Results Tab**

The *Results* tab displays the results from the attempted bulk delete as the following.

Delete Results tab
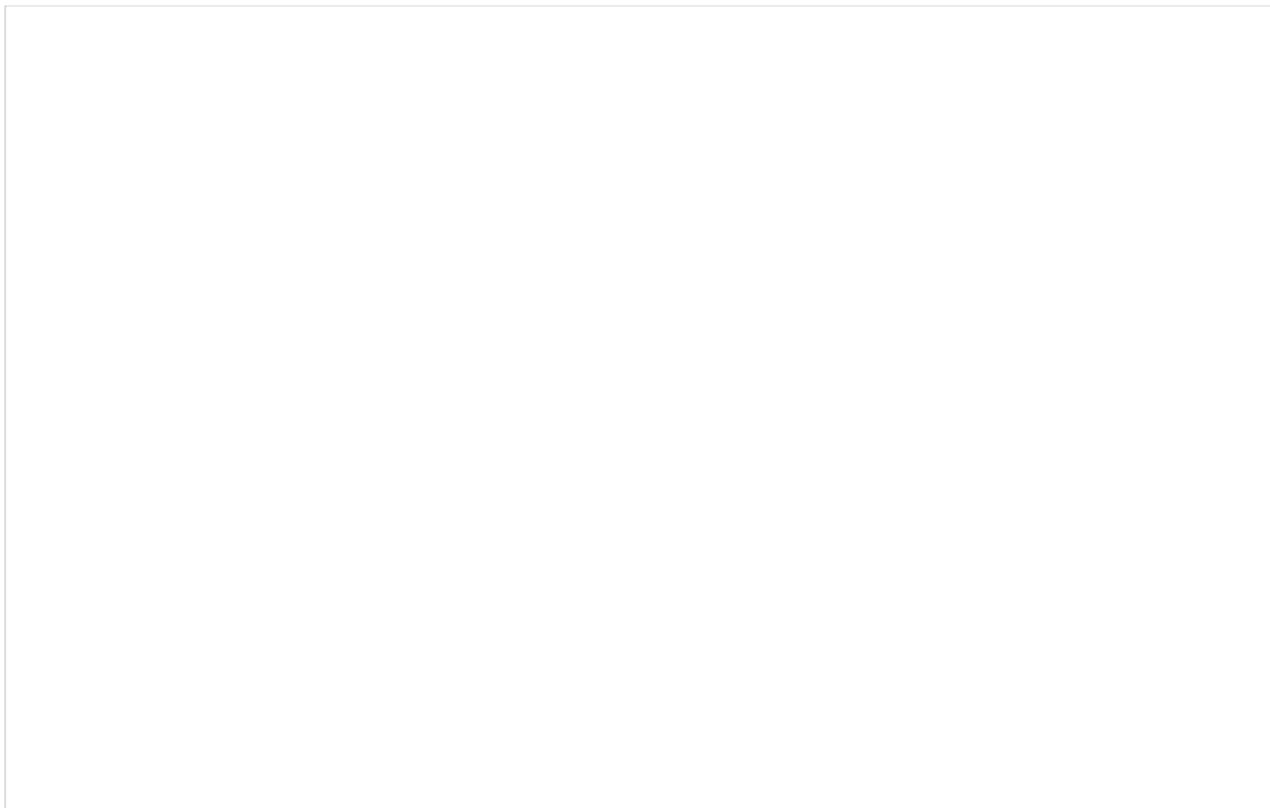
- **Records read** - The number of records read
- **Contacts deleted** - The number of contacts deleted
- **Errors detected** - The number of errors detected in the attempted delete

**Note**: If your delete attempt contains errors, you will be able to download a .CSV file listing the errors.

## Log Tab

The *Log* tab displays the following data from bulk imports, exports, and deletes.

The Log tab displays records of imports, exports, and deletes

## Date

*Date* is the date and time the transaction took place.

## Who

*Who* shows the user who initiated the transaction.

## Operation

*Operation* displays the type of transaction that occurred; the types are *Import*, *Export*, and *Delete*.

## File

*File* displays the name of the *Import* or *Delete* file.

## Rows

*Rows* displays the number of rows in the *File*.

## Added

*Added* displays the number of new contacts added to the database.

## Changed

*Changed* displays the number of contacts already in the database that were altered by the transaction.

## Deleted

*Deleted* displays the number of contacts removed from the database.

## Errors

*Errors* displays the number of records that were not added, changed, or deleted due to missing or incompatible information.
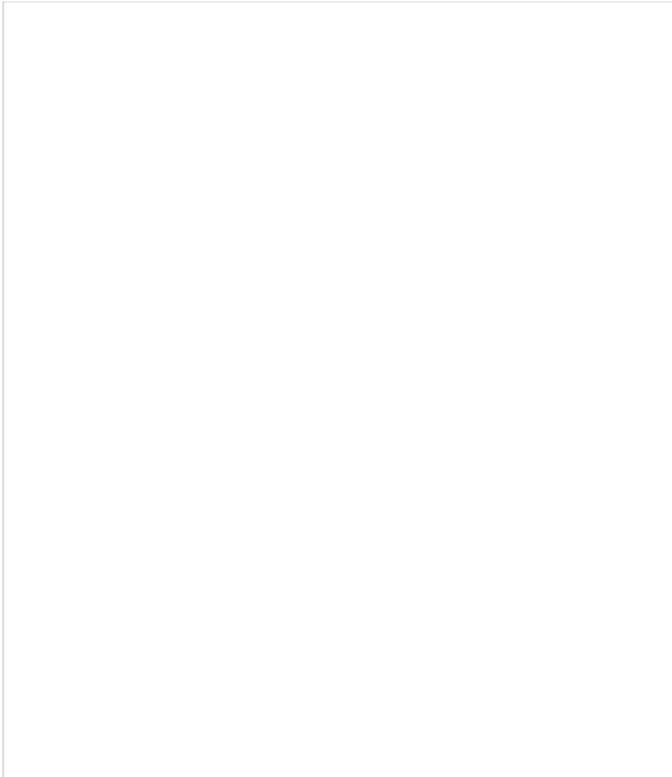
## Notes

*Notes* is where you may enter notes about the transaction.

# Dispositions and Notes

Dispositions are custom interaction results defined by your contact center management. When handling a service interaction, you may be required to select one of the [dispositions](#) that define the outcome of the interaction. If dispositions are defined for the services that you provide, the *[Contact Info Panel](#)* of your Agent Desktop will display the *Disposition Selector* for every associated service interaction.

If you are required to set dispositions, you will receive detailed instructions for their use from your system administrator. Learn more about [dispositions](#) and how they are managed in the *Contact Center Administrator Guide*.

In addition to dispositions, you can also enter free-form text notes to provide more information about the outcome of the interaction.
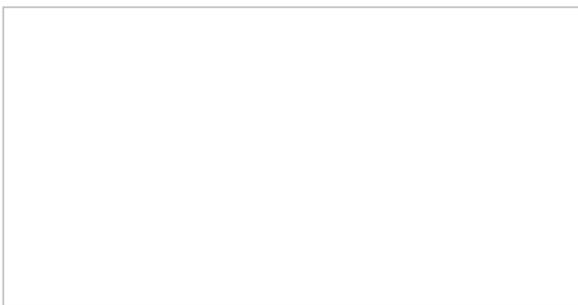
Disposition selector

## How to Enter Dispositions and Notes

To enter a disposition for an interaction and/or related notes, follow these steps:

1. At any time during the interaction with the customer or while in the *After Call Work* state, click the *Disposition selector*.
2. From the drop-down menu, select the disposition that corresponds to the result of the interaction. Some dispositions specific to outbound campaigns may require additional parameters, such as scheduling of another call attempt. If such parameters are required, they will be displayed in the *Contact Info Panel*.
3. If necessary, enter free-form notes in the text field.
4. Continue to process the interaction normally. For more information about finishing interactions, see How to Release a Call and How to Wrap Up After-call Work.

Selected disposition and free-form notes

**Note:** If you use a custom form in the *Context Information Area* for processing data related to a specific call, both the *Disposition Selector* and the *Notes* field may appear in that form instead of the *Contact Info Panel*.

# Other Uses for Dispositions

If configured for your contact center, a disposition can be used to trigger a *workflow*, an automated series of events that are initiated when an interaction is completed.

Workflows automate what happens after the conversation is done and will handle any necessary follow-ups, depending on the interaction's disposition type. Such follow-up actions include setting context variables, sending an email, sending a text message, scheduling an event, clearing a scheduled event, and making a request. Workflows help to reduce your workload by following up with customers and gathering data in a consistent way.

For example, setting a particular disposition for an interaction could trigger the following series of events to happen:

1. Send a survey to the customer
2. Wait a specified amount of time (e.g., 30 minutes, 1 day, 1 week, etc.)
3. Send a follow-up email to the customer.

## Using Dispositions to Request That Content Be Erased

Starting with Bright Pattern Contact Center version 5.2, you can use a disposition to request that content from a specific interaction be erased. This capability was added to meet PCI DSS 3.2 and GDPR requirements, which specify that sensitive data (e.g., credit card information) may not be stored in your contact center, even if it is encrypted. As such, Bright Pattern allows for the manual deleting of data that is stored in voice recordings, voice recording transcripts, chat transcripts, email messages, screen recordings, and so forth.

You can request that such data be erased, but only your system administrator can erase it.

**What to Do**

1. If such a disposition is enabled for your contact center, you can disposition an interaction with a request to erase content, provided that you give a reason. Note that the name of the disposition is determined by your contact center. If you do not know which disposition to select, contact your supervisor or system administrator.

Disposition "Erase content" selected

2. In the *Notes* field, provide the reason for the request and enter additional details about the interaction. Then complete the interaction.
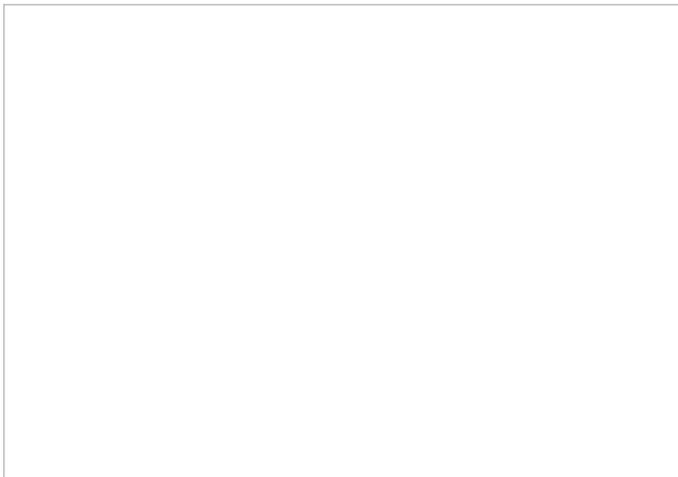
Use Notes to provide a reason for erasing content

3. The disposition will initiate a workflow that sends your system administrator an internal message with the request. The unique identifier tells the administrator which interaction is affected, and he or she can review the interaction and the request.
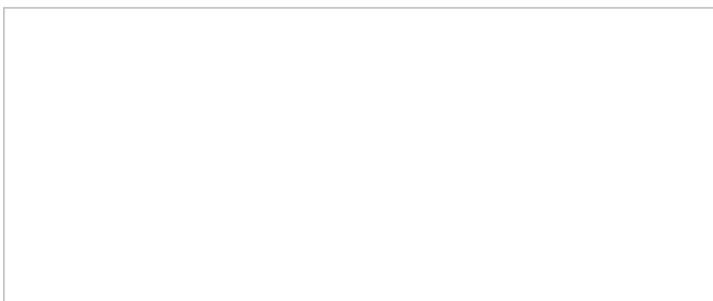
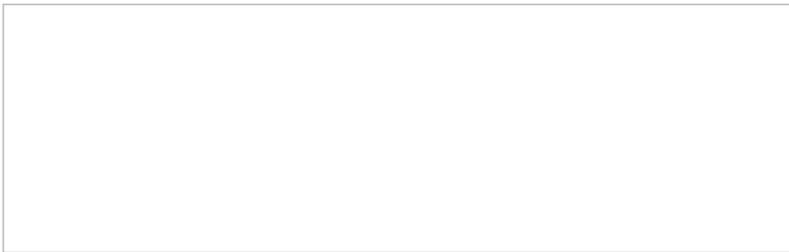Example message delivered to the system administrator

# Case State

Agent Desktop allows you to assign *state* to cases, which may be used to organize and classify your case workload. For more information about cases, see [My Cases Interface](#) and [Search & Preview Records Interface](#).
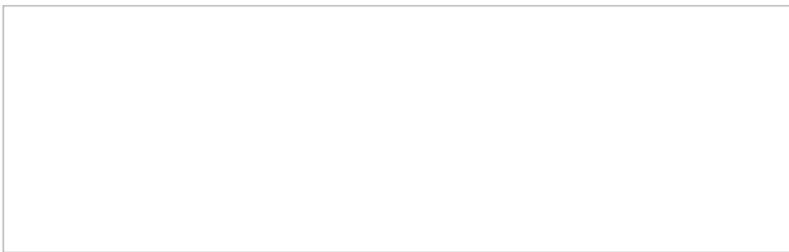
The following states can be applied to cases.

## New

This state is for new, unopened cases.
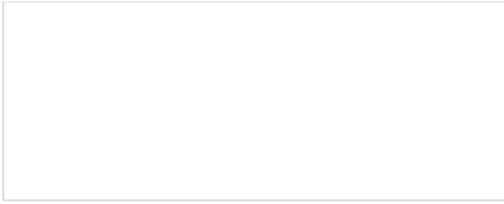
The New case state

## Open

This state is for cases that have been opened but are not yet processed.
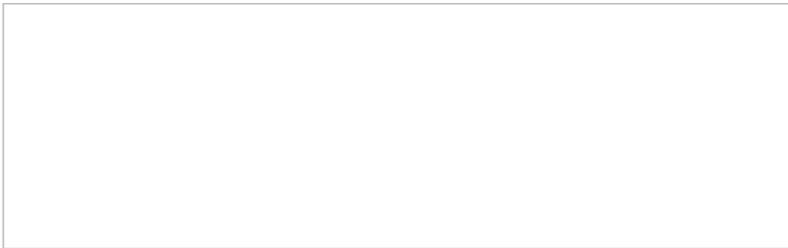
The Open case state

## Pending

This state is for cases that require further action. When a case is marked as Pending, you must select a corresponding Case Pending Reason. Case Pending Reasons are defined by your system administrator and allow you to provide additional information as to why a case is pending.

The Pending state with pending reason
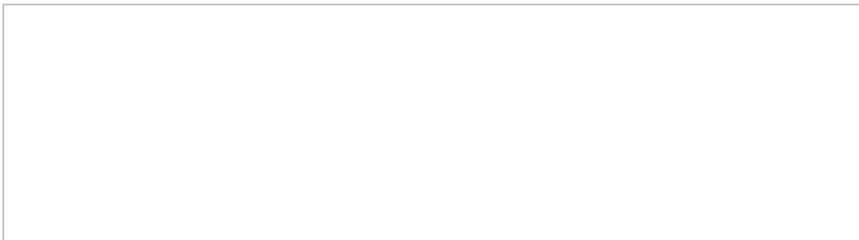
## Resolved

This state is for cases that are completed. Note that cases marked as Resolved can have changes made to them and will stay in the Resolved state for a period of time as configured by your administrator; after this point, the case will be [Closed](). Additionally, when marking a case as Resolved, you will have the opportunity to disposition it.


The Resolved case state

## Closed

This state is for cases that have exceeded the period of [Resolved]() days (as configured by your administrator). Changes cannot be made to closed cases; however, it is possible to create a [follow-up case]() from a closed case.


The Closed state

# Cases, Email, and Threads

In Agent Desktop, [interactions](#) can be associated with a *case*, be an *email*, and be associated with a *thread*. But what are the differences between these things? In this article, we explain the differences between cases, email, and threads.



A history of cases associated with a saved contact in section Search & Preview Records

## Cases and Email

A case is an instance of customer service that is created to track all communications related to a specific customer request. Cases can be [created manually](#) in your contact center or automatically if they arrive there as email. By contrast, email is a specific type of [channel](#) customers use to interact with your contact center. In short, all emails are cases but not all cases are emails.

When cases are created or emails arrive, the system automatically assigns a number to the case/email that is unique within your contact center (e.g., *14355*); it is maintained as an active entity while the request is being worked on, and closed when the request is fulfilled. When email arrives at your contact center, it is directed to section [My Cases](#); cases, on the other hand, can be created and found in [various sections](#) of Agent Desktop.

Cases and emails can be assigned a [case state](#), which indicates what the state of completion the interaction is in. Additionally, cases and emails can be assigned [dispositions](#). Dispositions are interaction results defined by your contact center management are used to indicate how the interaction was completed; your system administrator will explain how to use dispositions.

For more information, see [How to Create New Cases](#), [My Cases Interface](#), and [Search & Preview Records Interface](#).

## Threads

A group of emails related to the same case is called an email thread. When you reply to a customer's request for the first time, the system will generate a unique thread identifier. Depending on your system configuration, this identifier may be either attached to the email subject or hidden in an email header. Unlike the case number, the email thread identifier may contain both numbers and letters (e.g., JXA6PDRNQ2SO) and is intended primarily for automatic processing.

For example, when a new email comes in, the system will look for a thread ID and check if it matches any of the existing cases. If a thread ID is found and recognized, the system will automatically assign that email to the corresponding case. Depending on your service configuration, the system also may attempt to deliver that email to you if you have previously worked on this case.
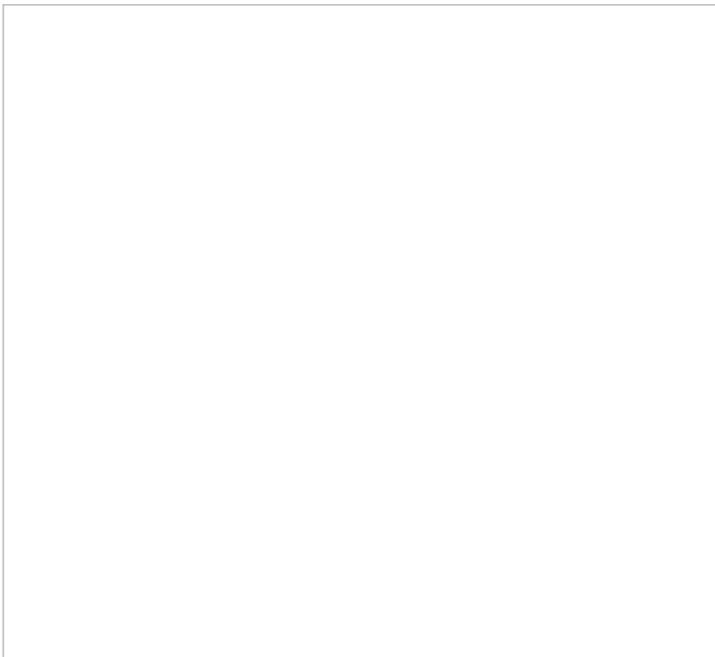


When you reply to an email, a thread ID is added to the email subject

1. REDIRECT [5.3:Agent-guide/Tutorials/Cases/HowtoCreateNewCases](#)

# 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/5c6dadc9d04fd75a777bdcfa/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/5c6dadc9d04fd75a777bdcfa)
- **<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:

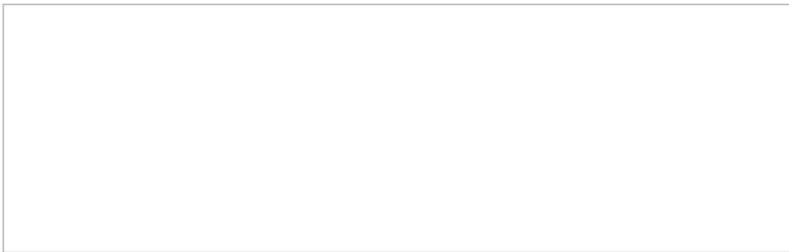- **contact/id/<id>** (e.g., contact/id/5c6dadc9d04fd75a777bdcfa)

# Case State

Agent Desktop allows you to assign *state* to cases, which may be used to organize and classify your case workload. For more information about cases, see [My Cases Interface](#) and [Search & Preview Records Interface](#).
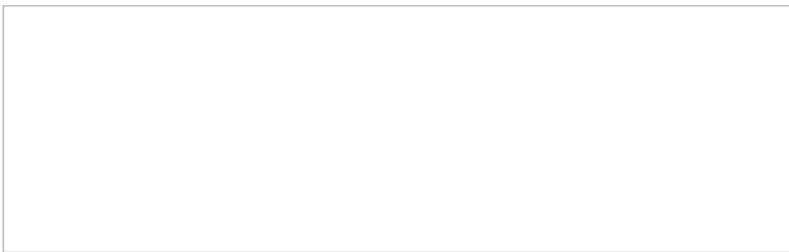
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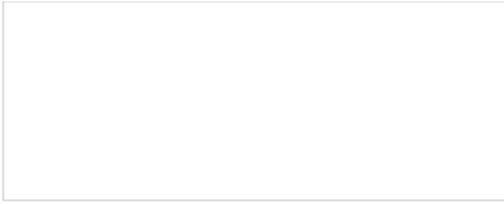


The New case state

## Open

This state is for cases that have been opened but are not yet processed.



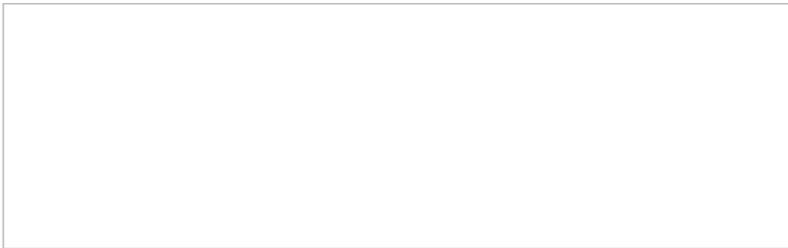The Open case state

## Pending

This state is for cases that require further action. When a case is marked as Pending, you must select a corresponding Case Pending Reason. Case Pending Reasons are defined by your system administrator and allow you to provide additional information as to why a case is pending.

The Pending state with pending reason
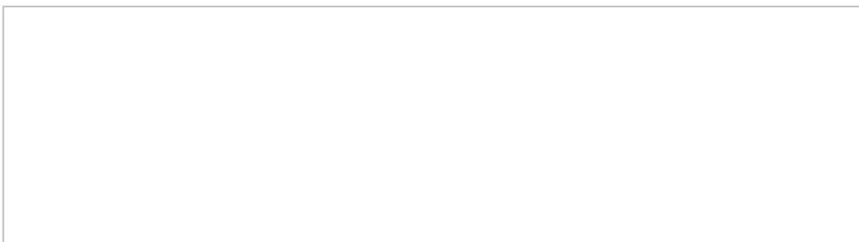
## Resolved

This state is for cases that are completed. Note that cases marked as Resolved can have changes made to them and will stay in the Resolved state for a period of time as configured by your administrator; after this point, the case will be [Closed](). Additionally, when marking a case as Resolved, you will have the opportunity to disposition it.

The Resolved case state

## Closed

This state is for cases that have exceeded the period of [Resolved]() days (as configured by your administrator). Changes cannot be made to closed cases; however, it is possible to create a [follow-up case]() from a closed case.

The Closed state