5.3 Case & Contact Management Overview

Bright Pattern Documentation

Generated: 12/01/2021 1:20 pm

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Purpose

The Bright Pattern Contact Center *Form Builder Reference Guide* describes the building blocks of the Bright Pattern Contact Center web forms. This guide explains how to use these building forms to build custom forms for the Agent Desktop application.

Forms are configured in the Contact Center Administrator application, while the form fields are added and edited in the Form Builder application. For more information about form management, such as association of forms with outbound campaigns, see the *Contact Center Administrator Guide*, section [Forms].

Drag and drop fields to build custom forms with the Form Builder application

General Settings

Case & Contact Management settings allow you to make system-wide changes to how cases and contacts are treated in Agent Desktop. Note that the settings shown here apply only to section Case & Contact Management, and they differ from the general settings shown in section [Call Center Configuration].

Case & Contact Management > General Settings

Automatically pin the case for the creating user

Selecting this checkbox allows cases created from an active call or chat to be automatically pinned to the creating agent. Automatically pinning interactions helps agents to keep better track of work by preventing important chats and calls from getting lost.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making a change to this property, we recommend that all affected logged-in agents refresh their browser page.

Setting final disposition resolves case

If this checkbox is selected, setting the disposition on a case to any option in the Final category will resolve the case.

Resolved case becomes closed after

If a case has been dispositioned as *resolved*, the case will be automatically closed after a specified number of days; the default number of days is 14.

Display contacts and cases for default search results

If this checkbox is checked, when an agent uses the search bar in *My Cases*, the results display the first 200 cases/contacts, newest first (sorted by creation date/time in descending order). If it is unchecked, no search information is displayed; the agent will see "Enter search criteria" in the middle of the table, instead. The default setting is checked.

Client Partitions

This section is reserved for future use.

Case Categories

Case categories are the optional labels that may be applied to email messages that are opened on Agent Desktop. Categories help agents to associate each case with a particular topic or level of support.

There are no default categories, as case categories are uniquely named and added to each contact center in this section of Contact Center Administrator. If no case categories are added here, there will be no available categories to apply to email messages in cases.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making any changes to case categories, we recommend that all affected logged-in agents refresh their browser page.

How to Add a Case Category

1. Click **add**.
2. Type the desired name of the category.
3. Select the green checkmark.
4. Click **Apply** to save your changes.

Adding new case categories

Agents working on open emails will be able to select from these categories using the **Select Category** drop-down selector.

Case Pending Reasons

Case Pending Reasons is the section where you create the pending reasons for cases; Pending is a state available for Agent Desktop cases that require further action, and the reasons will vary depending on your call center (e.g., needing manager approval, more customer information, etc.). For more information, see the *Agent Guide*, section Understanding Case States.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making any changes to case pending reasons, we recommend that all affected logged-in agents refresh their browser page.

Case Pending Reasons

How to Create a Case Pending Reason

To create a new Case Pending Reason, click **add**, enter the reason, then select the green, **apply changes** checkmark. In Agent Desktop, Case Pending Reasons must be selected if a case is marked as Pending.

Case Pending Reasons as seen in Agent Desktop

Custom Fields

The existing controls on forms can be extended with an option to save the final value of the field in a custom reporting field. Such custom fields are to be used for values that are not already present on default (e.g., account number in a third-party system, or an additional phone number that came in on an incoming call).

Custom fields may be added to Contact, Company, Case, Activity History, and Knowledge Base. To add a new field, click **Add** and specify the name of the custom field.

Storage for these custom fields is provided in detailed reports. Note that only non-aggregated fields can be selected for storage in detailed reports.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making any changes to custom fields, we recommend that all affected logged-in agents refresh their browser page.

Custom fields are added to Contact, Company, Case, Activity History, and the Knowledge Base

Contact

Contact custom fields are used to create unique fields related to contacts. These fields can be used in the Contacts section of Agent Desktop or added to forms in the Form Builder application.

Custom Contact field settings

Settings

Name

This is the name of the custom contact field.

Type

The type of field is **Text**.

Searchable in scenarios and workflows

When selected, this checkbox allows this field to be searchable in scenarios and workflows with the[Bright Pattern Search Object Block]. Note a maximum of three custom fields per object type may be marked searchable.

Company

Company custom fields are used to create unique fields related to companies. These fields can be used in the[Form Builder] application.

Custom Company field settings

Settings

Name

This is the name of the custom company field.

Type

The type of field is **Text**.

Searchable in scenarios and workflows

When selected, this checkbox allows this field to be searchable in scenarios and workflows with the[Bright Pattern Search Object Block]. Note a maximum of three custom fields per object type may be marked searchable.

Case

Case custom fields are used to create unique fields related to cases. These fields can be used in [Scenario Entries] or added to forms in the [Form Builder] application.

Custom Case field settings

Settings

Name

This is the name of the custom company field.

Type

The type of field is **Text**.

Searchable in scenarios and workflows

When selected, this checkbox allows this field to be searchable in scenarios and workflows with the Bright Pattern Search Object Block. Note a maximum of three custom fields per object type may be marked searchable.

Activity History

Activity History custom fields are used to gather information related to a contact's activities. They also can be connected to Knowledge Base fields. The configuration is defined system-wide, for all articles. By default, no fields are configured to be associated with Knowledge Base articles.

Custom Activity History field settings

Settings

Name

This is the name of the custom activity history field.

Type

The type of field is **Text**.

Export in campaign results

When selected, this setting allows custom Activity History fields configured in forms to be seen in exported campaigns results.

Persist in activity history

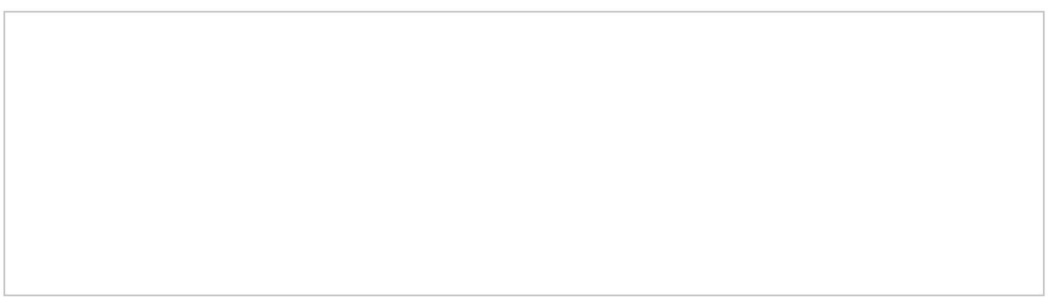
This setting allows this field to be written in the operational database. Note that Bright Pattern recommends checking either this setting, the *Export in campaign results* setting, or both; if neither is selected the data will not be written to the database.

Searchable in scenarios and workflows

When selected, this checkbox allows this field to be searchable in scenarios and workflows with the Bright Pattern Search Object Block. Note a maximum of three custom fields per object type may be marked searchable.

Knowledge Base

Knowledge Base custom fields are used in conjunction with activity forms agents use while on calls. Agents may choose to use a Knowledge Base article and use its contents to fill the form. When they click the **Use** button, a number of fields on the form will be prefilled with these associated custom field values. Initially, the supported field presentation types are text and list. The list configuration control is similar to the list configuration dialog in chat styling form configuration. All configuration options allow you to select from a list of Activity History variables.



An example of Knowledge Base custom fields

Settings

Name

This is the name of the custom Knowledge Base field.

Type

Choose from **Text** or **Selection List**. Note: If **Selection List** is chosen, you will configure list options in the Options setting.

Activity History Field

If you would like a custom Activity History field to be associated with your custom Knowledge Base field, you may configure it here.

Options

If you have chosen **Selection List** as the type of custom Knowledge Base field, you will configure the list options here.

Custom Knowledge Base field settings

Forms Sections

The following is a list of sections in the Contact Center Administrator application, section Forms. Note that forms are configured in the Form Builder application. For more information, see the *Form Builder Reference Guide*.

- Activity
- Activity History
- Contact
- Case
- Augmentation

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.

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.