

5.3 Interaction Records Search

Bright Pattern Documentation

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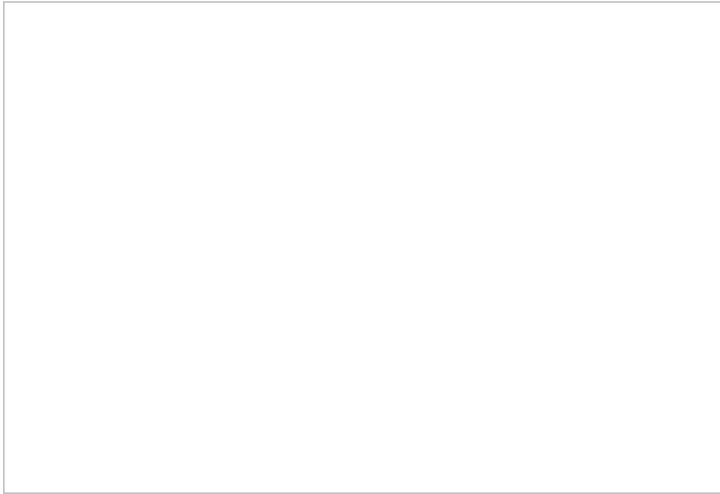
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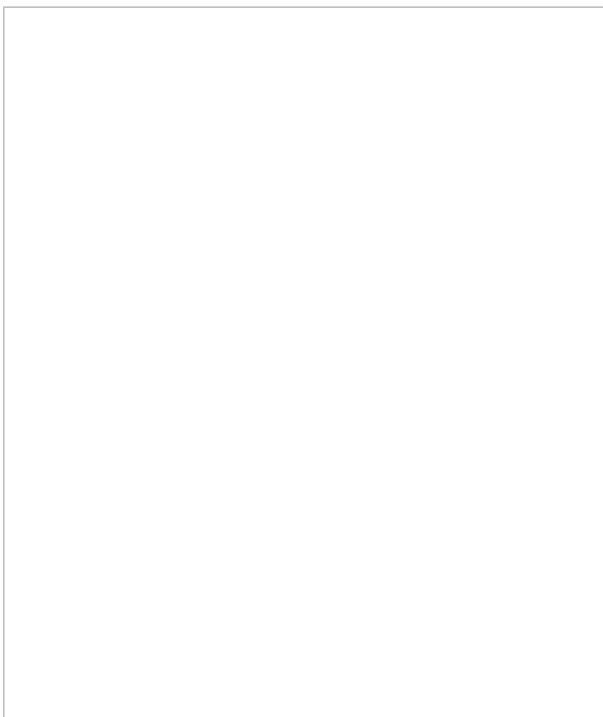
Search Criteria

[Interaction records searches](#) may be narrowed down with specific search criteria. If, for example, you wish to search for interaction records pertaining to one agent only, you may add the *agent* condition to your search, specifying the agent's name, in order to view interaction records search results for just that agent.



Click "add condition" to view available search criteria

The criteria for such searches are listed in a drop-down menu that appears when you click **add condition**.



Select the conditions of your search

Search Criteria Descriptions

The criteria for such searches are described in the order in which they appear in the drop-down menu on the *Interaction Records > Search* page. Note that the criteria shown in the drop-down menu will depend on the media type (i.e., voice, chat, email) that you select for your search. **Please note:** Some criteria are not available to users with [BPO client privileges](#) only; these criteria will be marked with an asterisk(*).

KM template used *

KM template used (where "KM" refers to "Knowledge Management") returns records of interactions where any [Knowledge Base](#) article was used. Note that *KM template used* applies to text-based interactions only. This criterion is not available to users who only have BPO client privileges.

account number

account number returns call attempts made with respect to the [calling list](#) record that contains the specified value in the field of the *account number* type.

agent *

agent returns records of interactions handled by the agent with the specified username. This criterion is not available to users who only have BPO client privileges.

case ID *

case ID returns records of email interactions associated with the specified [case](#). This criteria is not available to users who only have BPO client privileges.

connected to *

connected to returns records of calls answered at the specified phone number. This criterion is not available to users who only have BPO client privileges.

direction

direction can be used to limit the search to incoming, outgoing, or internal interactions only. Note that not all directions apply to all media types.

disposition

disposition returns records of interactions that were processed with the specified disposition.

duration

duration returns records of interactions whose overall duration was greater than or less than the specified value.

ended after

ended after returns records of interactions whose processing ended after the specified date and time.

ended before

ended before returns records of interactions whose processing ended before the specified the date and time.

first name *

first name returns records of interactions handled by agents with the specified first name. This criterion is not available to users who only have BPO client privileges.

from

from returns records of interactions originated from the specified address.

- For inbound calls, *from* is the Caller ID.
- For outbound and internal calls, *from* is the extension from which the call was dialed.
- For chats, *from* is the IP address of the originating computer.

global interaction_id

global interaction_id returns interaction record(s) with the specified [Global interaction identifier](#).

has call problem *

has call problem is used to search for calls that were marked by agents as [calls with quality problems](#). You can select a particular type of problem or set it to *any* to get all records with quality problems of any kind. This criterion is not available to users who only have BPO client privileges.

has recording

has recording returns records of calls that have voice recordings available for playback in the system. This search condition does not return records of calls whose recordings were deleted due to the data storage limits imposed by your service provider.

has screen recording *

has screen recording returns records of calls that have screen recordings available for playback in the system. This search condition does not return records of calls whose recordings were deleted due to the data storage limits imposed by your service provider. This criterion is not available to users who only have BPO client privileges.

has voice signature

has voice signature returns records of calls during which a voice signature was collected from the customer. This search condition returns records of calls whose recordings were deleted due to the data storage limits imposed by your service provider. Assuming that you had those recordings exported and stored externally, you can use details of such records (e.g., *GIID*) to look for those recordings in your external storage.

in email subject *

in email subject returns records of all email interactions containing the specified text in their subject. This criterion is not available to users who only have BPO client privileges.

last name *

last name returns records of interactions handled by agents with the specified last name. This criterion is not available to users who only have BPO client privileges.

my_custom_field *

my_custom_field allows you to specify the value of a field to filter interactions. This criterion is not available to users who only have BPO client privileges.

no KM template used *

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sentiment as float *

sentiment as float is the average values of sentiments for interactions. This can be calculated if a tenant has [Natural Language Understanding \(NLU\)](#) integration account configured and set for services. If administrators use this criterion, they can find interaction with negative or positive sentiments. For example, searching for a value of "< - 0.5" will yield negative sentiment results or searching for a value of "> 0.75" will yield positive sentiment results. This criterion is not available to users who only have BPO client privileges.

service

service returns records of interactions associated with the specified service.

specific KM template used *

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started after

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text search *

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thread ID *

thread ID returns records of email interactions associated with the specified [email thread](#). This criteria is not available to users who only have BPO client privileges.

to

to returns records of interactions sent to the specified original destination.

- For inbound calls, *to* returns the number originally dialed by the caller.
- For chats, *to* returns name of the [messaging/chat scenario entry](#).

was flagged *

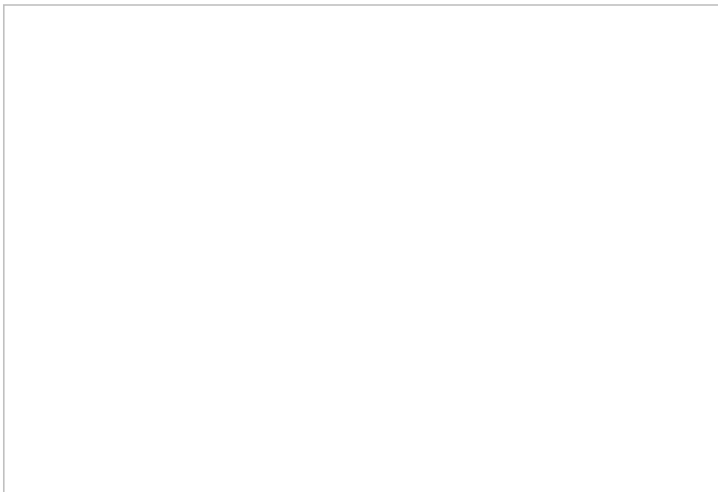
was flagged returns records of interactions that were [flagged](#). This criteria is not available to users who only have BPO client privileges.

was transferred

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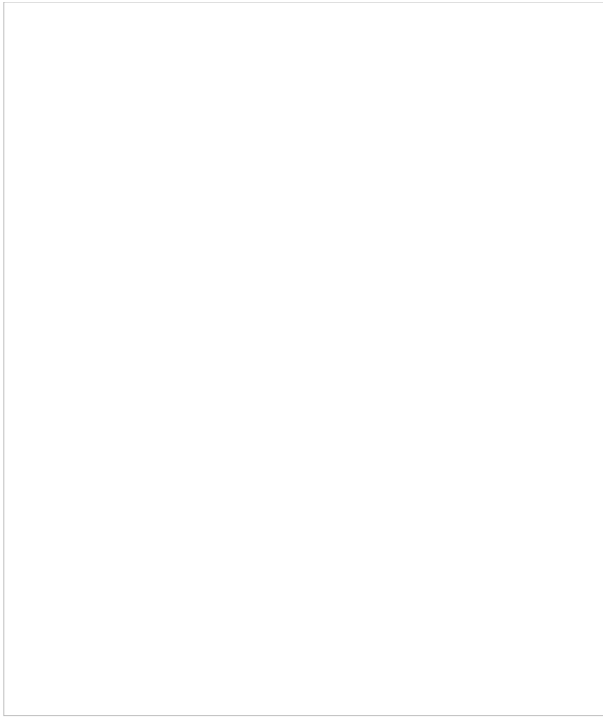
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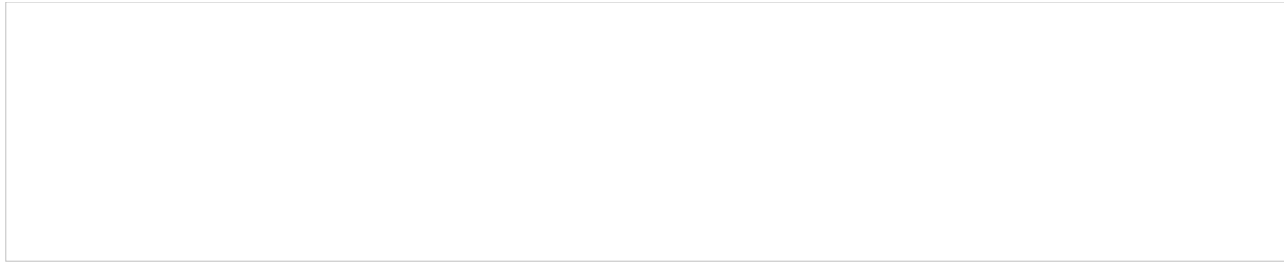
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was transferred

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Search Results

Your interaction records search will return a detailed list of data relating to the search criteria specified. This data may be used for a variety of purposes, such as for agent evaluation, training, viewing interaction metrics, understanding scenario actions taken, accessing recordings, and more.



The interaction records search returns detailed results

Column Descriptions

The search results are given in a table of data. Each column may be sorted by mousing over the column header name and clicking the "down" arrow. The data columns are described as follows, in the order shown in the results.

Interaction Icons

The far left column displays an icon that indicates the type of interaction:

- Call
- Chat
- Email

Date and Time

For inbound interactions, *Date and Time* displays the date and time when the interaction entered the system. For internal and outbound interactions, this column displays the date and time when the interaction was initiated. The time is given in Universal Coordinated Time (UTC).

From

- For chats and emails, *From* displays the IP address of the originating computer.
- For inbound calls, *From* displays the caller ID.
- For outbound and internal calls, *From* displays the extension from which the call was dialed.
- For chats, *From* displays the IP address of the originating computer.

To

The *To* column displays the original destination of the interaction.

- For inbound calls, *To* displays the number originally dialed by the caller.
- For chats, *To* displays the name of the Mobile/Web scenario entry.
- For emails, *To* displays the recipient email address.

Connected to

Connected to displays the name or email address (if known) of the party that received the call, chat, or email. If unknown, nothing is displayed.

Duration

For calls and chats, *Duration* displays the total duration of the interaction from the moment it entered the system or was initiated, until it was released.

Note that for reporting purposes, transferred interactions produce multiple records (called *segments*) where the first record shows *Duration* as an empty string and the last record shows the total interaction duration.

Flag

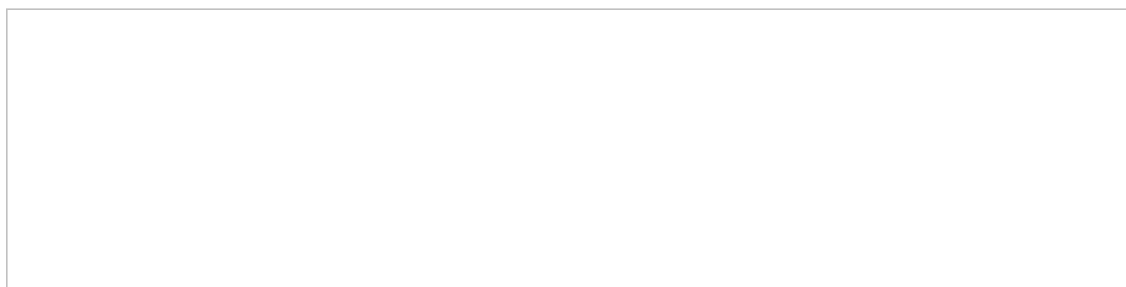
If the interaction was flagged by the agent who handled the interaction or by the supervisor who reviewed the interaction, a small flag icon is shown in this column.

Scenario

Scenario displays the name of the first scenario that was used to process this interaction. The scenario name is given as a link, which, when clicked, directs you to the *Scenario Steps* page that lists each action taken during the scenario.

The *Scenario Steps* provide the following information for the scenario at hand:

- **Execution Order** - The numbered order in which the scenario step occurred
- **Date & Time** - The date (month/day/year) and the time (in Universal Coordinated Time (UTC) in which the scenario step occurred
- **Duration** - The total length of the scenario step
- **Scenario Name** - The name of the scenario entry used
- **Block Type** - The shorthand name of the scenario block used (i.e., *IdentifyCustomer*, *RequestInput*, *SetProperty*, etc.)
- **Block Title** - The title of the block, if a variable or function is used to specify values in the scenario block
- **Block ID** - The numeric identifier of the scenario block
- **Block Exit taken** - The type of conditional exit taken for the scenario (note that this is one of the most useful scenario steps provided, as it shows why an interaction was ended)



Interaction Records > Scenario Steps

Service

Service is the name of the voice, chat, or email service associated with this interaction. Note that for reporting purposes, if the interaction was recategorized or transferred to a different service, each such event will produce a new record with a new service name.

Disposition

The *Disposition* column displays the [disposition](#) (if any) assigned to this interaction by the agent.

Notes

This column displays any free-text notes provided by the agent for this interaction. Notes convey additional information about an interaction that may not be obvious from the disposition.

Account number

Account numbers are customer identifiers that can sometimes be used as calling record keys. If an account number is associated with the interaction, that number will be displayed in this column.


Case ID

For email interactions, *Case ID* specifies the number of the case with which the email is associated. You can also view the case ID by double-clicking the global interaction ID (see below) and looking at the case history for the interaction.

Agent

Agent is the username of the agent who handled the interaction.

Recording

If a [call recording](#) or a chat transcript (for chats) is attached to the interaction, the recording will be displayed as a small icon . Click the icon link to either listen to or view the transcript of the recorded interaction.

Segments

Interactions with the same customer or user may have multiple segments (i.e., parts of the interaction). For example, an inbound call may be accepted by one agent and then transferred to another, giving the interaction two segments for the same interaction. The *Segments* column displays the total number of segments, even if there is only one.

Subject

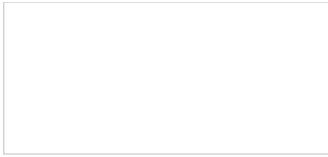
For email interactions, *Subject* is the subject line of the email message.

Call Problem

Call Problem displays useful information regarding the quality of the call (i.e., static, dropped calls, silence, etc.).

Global Interaction ID

[Global interaction ID](#) (GIID) is a [UUID](#)-formatted number assigned to every interaction processed within Bright Pattern Contact Center.



Examples of global
interaction IDs in search
results

You can double-click the GIID to view the *Case History* of the interaction.

Case History includes the following data columns:

- **Interaction icons** - Icons that indicate the type of interaction (i.e., notes, customer email, agent reply, etc.)
- **Date and Time** - The date and time when the interaction entered the system or was initiated; time is given in Universal Coordinated Time (UTC).
- **From** - The name of the interaction recipient (if known)
- **To** - The name of the original destination of the interaction (if known)
- **Disposition** - The disposition (if any) assigned to this interaction by the agent
- **Text** - For chats and emails, the first line of text for the interaction

1. REDIRECT [5.3:Contact-center-administrator-guide/ServicesandCampaigns/ResultsTab](#)

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