

5.8 Contacts

Bright Pattern Documentation

Generated: 8/19/2022 7:28 pm

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Contacts Tutorials

Agent Desktop's Search and Preview Records section, formerly known as *Contacts*, stores information about a person's contact details, activity history, cases, call recordings, chat transcripts, and contains a powerful search tool.

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

Articles

- [How to Create a New Contact](#)
- [How to Edit an Existing Contact](#)

How to Create a New Contact

There are several ways to create a new contact (i.e., add a new record) in Agent Desktop. You can enter details for a new contact manually via the Contacts search results, or you can add a new record quickly from a number of contact summary pop-ups. The ways to create a new contact are described as follows.

Search Results

1. On the Contacts Search results list, click the **Create** button at the bottom of the screen.



Filling in the contact Details form

2. The Contact Details form will open, and from there, you can enter all contact information.

Search Anonymous ^x

Save Cancel

| | | | |
|-----------------|----------------------|--------------------|----------------------|
| First name: | <input type="text"/> | Company Revenue: | <input type="text"/> |
| Last name: | <input type="text"/> | Company Employees: | <input type="text"/> |
| Title: | <input type="text"/> | Company Name: | <input type="text"/> |
| + add phone | <input type="text"/> | Web: | <input type="text"/> |
| + add messenger | | Segment: | ▾ << None >> |
| + add email | | Summary: | <input type="text"/> |
| + add address | | | |
| Date of Birth: | <input type="text"/> | | |

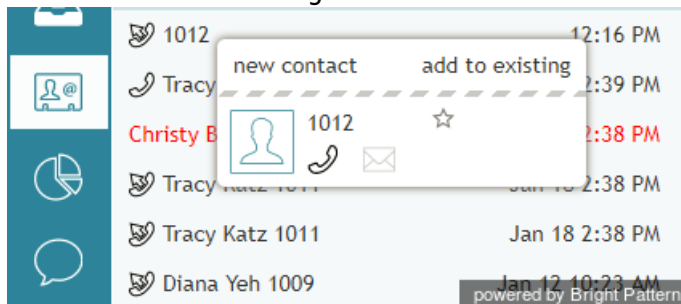
Augment

Filling in the contact Details form

3. Click **Save**.

"Add New" Option on Contact Pop-Up

1. On the Active Conversations List, click the *Recent* tab.
2. Hover your mouse cursor over the contact's name.
3. If no details have been saved for that contact, the contact summary pop-up will provide links labeled *new contact* and *add to existing*.



Click "new contact"

4. Click **new contact**.
5. The *Add New Record* pop-up will appear with four basic fields to complete: name, phone extension (which may be pre-filled for you), email, and photo.

A screenshot of the "Add New Record" pop-up form. The form has a title bar with a close button (X). It contains four input fields: a "Photo" field with a placeholder image, a "Name" field containing "Anonymous", a "Phone" field containing "61402591597", and an "email" field. At the bottom of the form are three buttons: "Create" (blue), "Add and Edit" (blue), and "Cancel" (orange). A small watermark "powered by Bright Pattern" is visible at the bottom right.

Add New Record

6. Click **Create** to create a simple record quickly, or click *Add and Edit* to add more information to an existing contact.

Calendar

1. On your calendar, add a new event.
2. Click the + sign at the bottom of the pane where you edit event details. The + sign allows you to assign a contact to the event.

Calendar: Christy Borden ▾

Reassign by range...

< > today January 2018 month week day

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|---------------------|-----|-----------------|-----|------------|-----|
| 31 | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| | | | | | 8a Meeting | |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| | 8a check-in | | 8a market recap | | | |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| | 8a project overview | | 8a market recap | | 8a 1 on 1 | |
| 28 | 29 | 30 | 31 | 1 | 2 | 3 |
| | | | 8a market recap | | | |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |

Date: 1/29/18 1/29/18
Time: 08:00AM 09:00AM
Timezone: local
Reminder: 10 minutes
Summary:
Details: none
 completed



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Assign a contact to a calendar event

3. Click Enter manually (or directory).

Calendar: Christy Borden ▾

Reassign by range...

< > today January 2018 month week day

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|---------------------|-----|-----------------|-----|------------|-----|
| 31 | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| | | | | | 8a Meeting | |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| | 8a check-in | | 8a market recap | | | |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| | 8a project overview | | 8a market recap | | 8a 1 on 1 | |
| 28 | 29 | 30 | 31 | 1 | 2 | 3 |
| | | | 8a market recap | | | |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |

Date: 1/29/18 1/29/18
Time: 08:00AM 09:00AM
Timezone: local
Reminder: 10 minutes
Summary:
Details: none
 completed



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Assign a new contact by typing in the name

4. Enter the name of the new contact and select the checkbox for create contact.

Sahara Mattison X

contact on:

create contact Business

+ powered by Bright Pattern

Type in the name of your contact

5. At the top of the pane, click Save. If you do not save the event details, your new contact will not be created.

project overview

Assign...

Save

Cancel

Delete

Date: 1/22/18 1/22/18

Time: 08:00AM 09:00AM

Timezone:

Reminder:

Summary:

Details: none

completed

contact on:
 create contact

+ powered by Bright Pattern

Save details

How to Edit an Existing Contact

After a contact has been added, it may be necessary to add to or change the listed information. **Note:** In order to edit a contact's information, the privilege must be enabled by your contact center administrator.





The screenshot shows a contact management interface. At the top, there's a search bar with "Aiden Bookbinder" entered. Below the search bar, the contact's name "Aiden Bookbinder" is displayed along with a profile picture and the email "aiden.bookbinder@gmail.com". There are "Save" and "Cancel" buttons. The main form contains the following fields:

- First name: Aiden
- Last name: Bookbinder
- Title: Mr.
- Mobile: 16505555555 (with a red X icon)
- add phone: 16503463553
- LINE: U6b4b0a5c0e5a0269XxSxSX9XnXknml (with a red X icon)
- add messenger: Primary... aiden.bookbinder@gmail.com (with a red X icon)
- add email: Primary... 123 Fake St. (with a red X icon)
- Address line 2: Springfield
- Address: MO 65804
- add address: (empty)
- Date of Birth: 07/11/1980
- Company Revenue: (empty)
- Company Employees: (empty)
- Company Name: N/A
- Web: (empty)
- Segment: Gold
- Summary: (empty)

At the bottom right of the form is an "Augment" button. The left sidebar has a "Directory" tab selected, and the top right corner has a "Powered by Bright Pattern" logo.

Editing an existing contact's information




To edit an existing contact's information, follow these steps:

1. Go to the *Contacts* section.
2. In the *Contacts* tab, find the contact that needs editing.
3. To view the contact's information, either double-click on the contact name or highlight it and click the **Open**  button.
4. After opening the contact's information, click **Edit**  to add to or remove information.
5. When you are finished editing the contact's information, click **Save** .
6. If you made edits to a contact's information but do not want to save them, click **Cancel** .

Contact Augmentation

If your contact center is integrated with an external database (e.g., NextCaller), it is possible to merge matching customer contact information through augmentation. Note the setting that allows augmentation must be configured by your administrator in order to work.

Augment the Contact Data

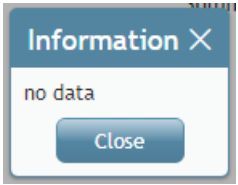
| | Local | | NextCaller |
|---------|---|--------------------------|--|
| Image |  | <input type="checkbox"/> |  Facebook  LinkedIn |
| Name | Jeanne Wengler | <input type="checkbox"/> | Jeanne Wengler |
| Title | Director | <input type="checkbox"/> | |
| Company | 123Warehousing, Inc | <input type="checkbox"/> | |
| Home | 1-234-555-1212 | <input type="checkbox"/> | 1-234-555-1216 home |
| Mobile | 1-234-555-1213 | <input type="checkbox"/> | 1-234-555-1217 mobile 1-234-555-1218 mobile |
| Office | 1-345-678-9999 2315 | <input type="checkbox"/> | 1-345-678-9959 2315 office |
| Other | 1-345-678-9999 | <input type="checkbox"/> | 1-345-678-9959 other |
| Email | jeanne.wengler@123warehousing.com | <input type="checkbox"/> | jeanne.wengler@125warehousing.com |
| Www | www.warehousing.com | <input type="checkbox"/> | |
| Address | 1234 Cherry ave San Bruno, CA | <input type="checkbox"/> | 1234 Cherry ave San Bruno, CA |

When augmenting a contact, choose which information to merge in Agent Desktop

To augment an existing contact's information, follow these steps:

1. Go to the *Contacts* section.
2. In the *Contacts* tab, find the contact that needs editing.
3. To view the contact's information, either double-click on the contact name or highlight it and click the **Open** button.
4. After opening the contact's information, click **Augment** and a directory will open.
5. Click the boxes next to the information you wish to merge into Agent Desktop; you may choose to import all contact information from another site (e.g., LinkedIn) or only specific fields (e.g., Name, Email, etc.).
6. After selecting the information, click **OK** .
7. If you do not wish to proceed with the augmentation, click **Cancel** .

Note: If you do not have an integrated external database and click **Augment**, a small pop-up window will display the message, "No data."



No integrated
database message