



## 5.8 Contacts Tutorials

### Bright Pattern Documentation

Generated: 7/04/2022 6:59 am

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# Search & Preview Records Overview

Agent Desktop's section *Search & Preview Records* is where case and contact information is stored and can be searched for. Note that prior to Bright Pattern Contact Center version 5.3.0, Search & Preview Records was known as *Contacts*.

**Note:** The *Bulk Export/Import Contacts* feature available in this section prior to release 5.3.2 was removed and added to the Contact Center Administrator application, section [Contact Import & Export](#).

## Articles

The following is a list of articles in this section:

- [Search & Preview Records Interface](#)

## Tutorials

Learn more about using the Search and Preview Records features in this guide's [Tutorials](#) section.

- [Advanced Search](#)
- [How to Create a New Contact](#)
- [How to Add to an Existing Contact](#)
- [How to Create New Cases](#)
- [Using URL Variations to Access Case and Contact Information](#)

# 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 <sup>x</sup>



Save Cancel

First name:

Last name:

Title:

+ add phone

+ add messenger

+ add email

+ add address

Date of Birth:

Company Revenue:

Company Employees:

Company Name:

Web:

Segment:

Summary:

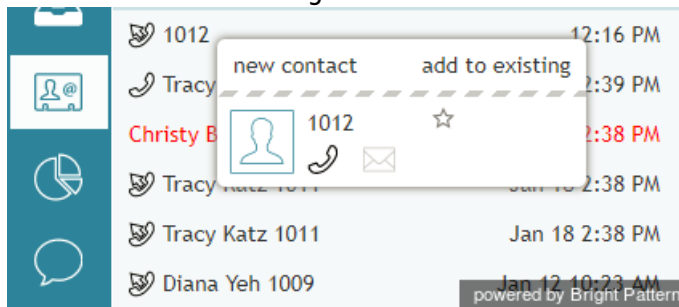
Augment

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.

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			
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Date: 1/29/18 1/29/18  
Time: 08:00AM 09:00AM  
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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 ✕

contact on:

create contact ▾ Business

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: local

Reminder: 10 minutes

Summary:

Details: none

completed

Sahara Mattison X

contact on:

create contact Business

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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 displays a contact management application interface. On the left is a vertical sidebar with icons for various functions: a home icon, a speech bubble, a pie chart, a clock, a person icon, a printer, a calendar, a document, and a grid. The main area is titled 'Select Service' and contains a search bar with 'Aiden Bookbinder' entered. Below the search bar are tabs for 'Directory', 'Favorites', 'Recent', and 'Dial Pad'. The 'Directory' tab is active, showing a search term input field and a list of categories: Administrators, Contact Center Support, CSIM Support, Customer Service, Maintenance Renewal, and Management. The contact details for 'Aiden Bookbinder' are shown in a form. The form includes a profile picture, name (Aiden Bookbinder), title (Mr.), and email (aiden.bookbinder@gmail.com). There are sections for adding phone numbers (Mobile: 16505555555, LINE: U6b4b0a5c0e5a0269XxSxSX9XnXknml), messengers (Primary: aiden.bookbinder@gmail.com), emails (Primary: 123 Fake St.), and addresses (123 Fake St., Springfield, MO 65804). The date of birth is 07/11/1980. On the right side of the form, there are fields for Company Revenue, Company Employees, Company Name (N/A), Web, Segment (Gold), and Summary. At the bottom right of the form are 'Save' and 'Cancel' buttons, and an 'Augment' button.

## 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

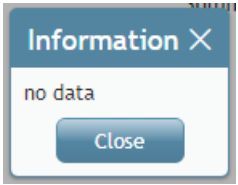
When augmenting a contact, choose which information to merge in Agent Desktop

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