5.8 Contacts Tutorials

Bright Pattern Documentation

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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

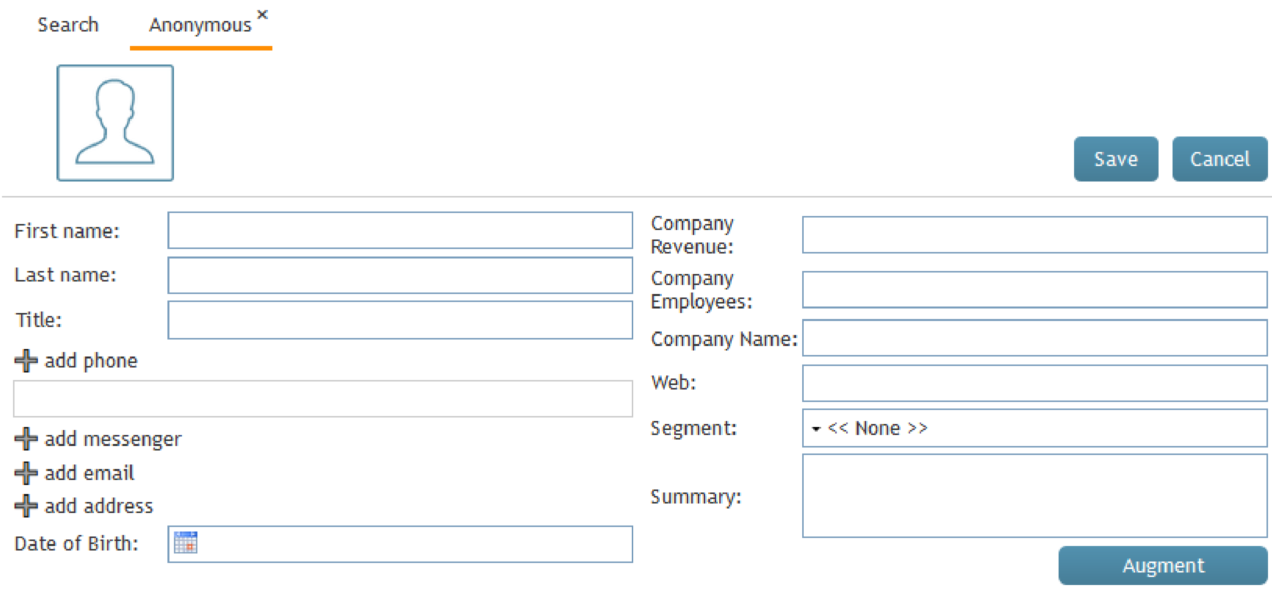
How to Create a New Contact

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.

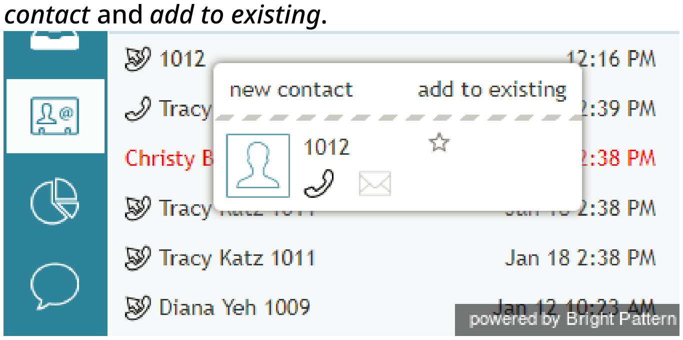


Filling in the contact Details form

3. Click **Save**.

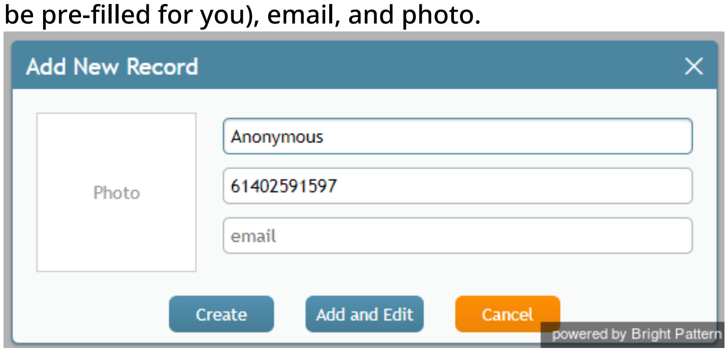
"Add New" Option on Contact Pop-Up

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.

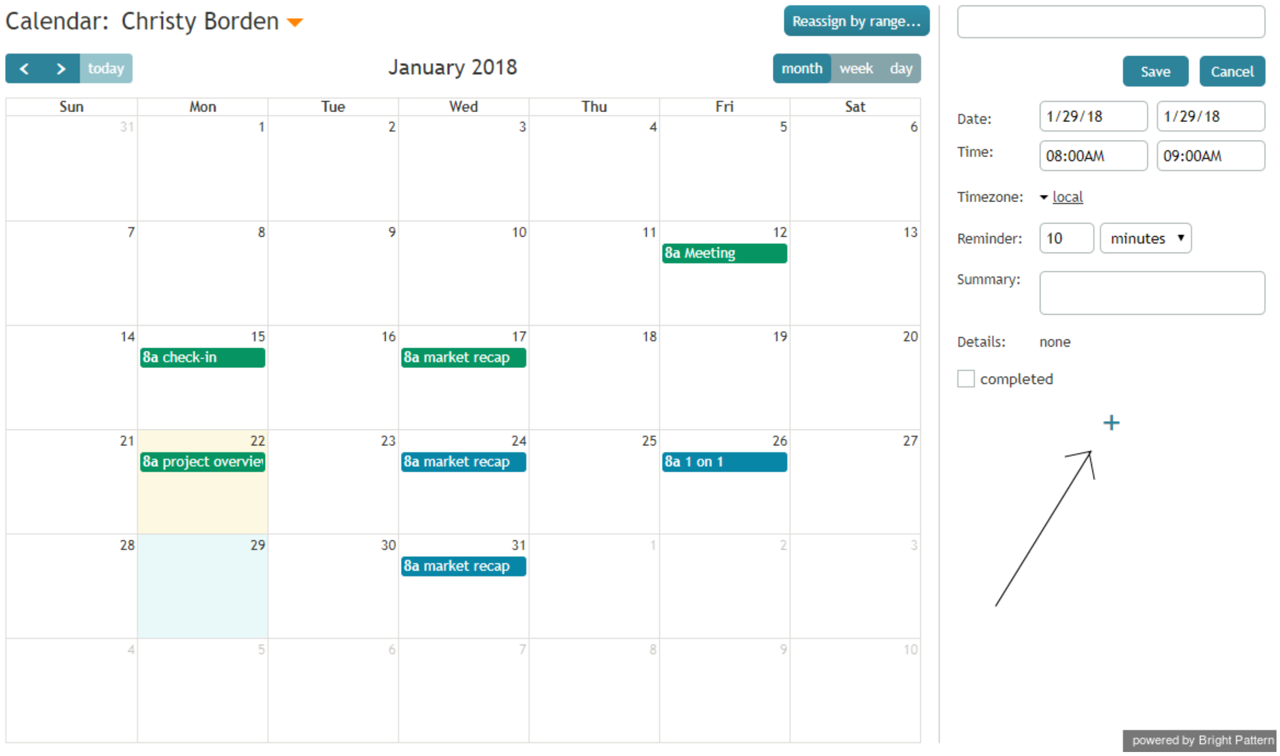


Add New Record

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

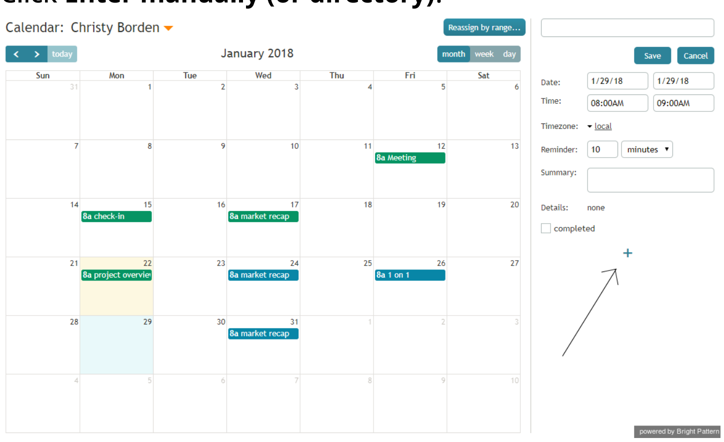
Calendar

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.



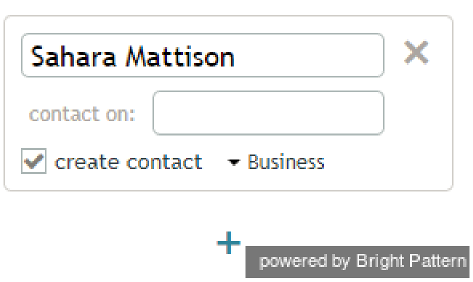
Assign a contact to a calendar event

3. Click **Enter manually (or directory)**.



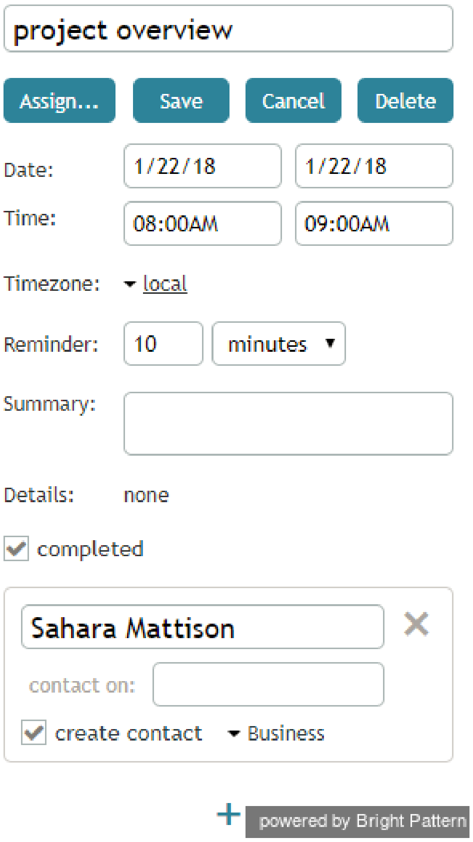
Assign a new contact by typing in the name

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



Type in the name of your contact

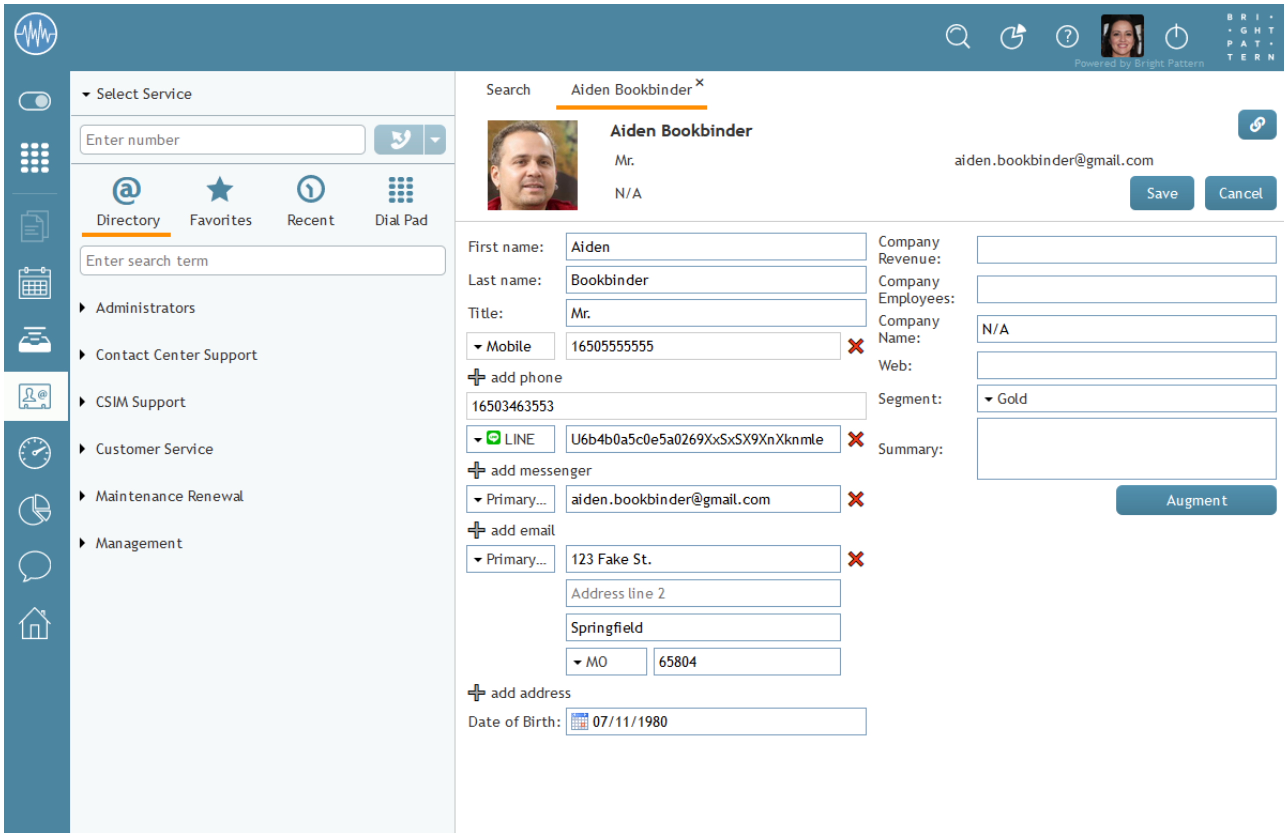
5. At the top of the pane, click **Save**. If you do not save the event details, your new contact will not be created.



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.



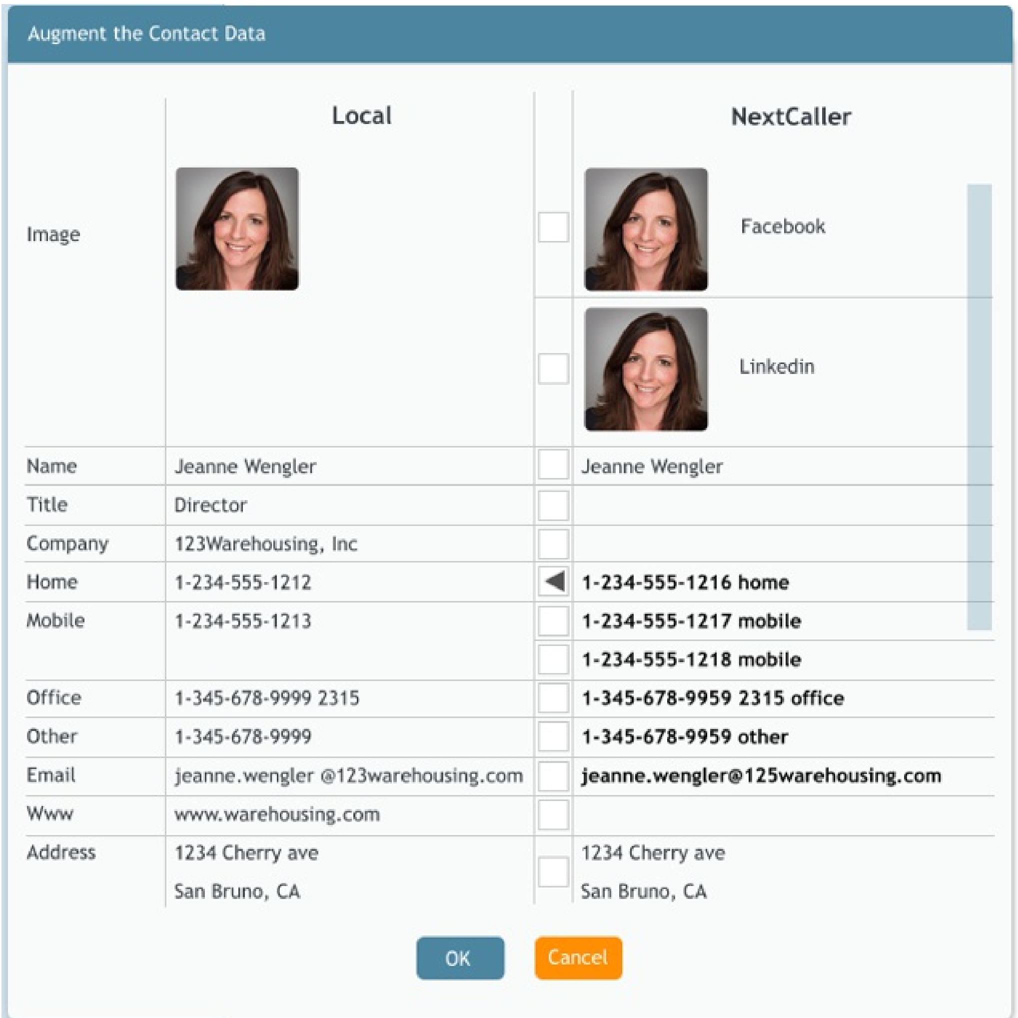
Editing an existing contact's information

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** Open button.
4. After opening the contact's information, click **Edit** Edit to add to or remove information.
5. When you are finished editing the contact's information, click **Save** Save.
6. If you made edits to a contact's information but do not want to save them, click **Cancel** 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.

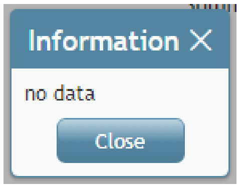


When augmenting a contact, choose which information to merge in Agent Desktop

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