

5.8 Advanced Search

Bright Pattern Documentation

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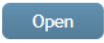


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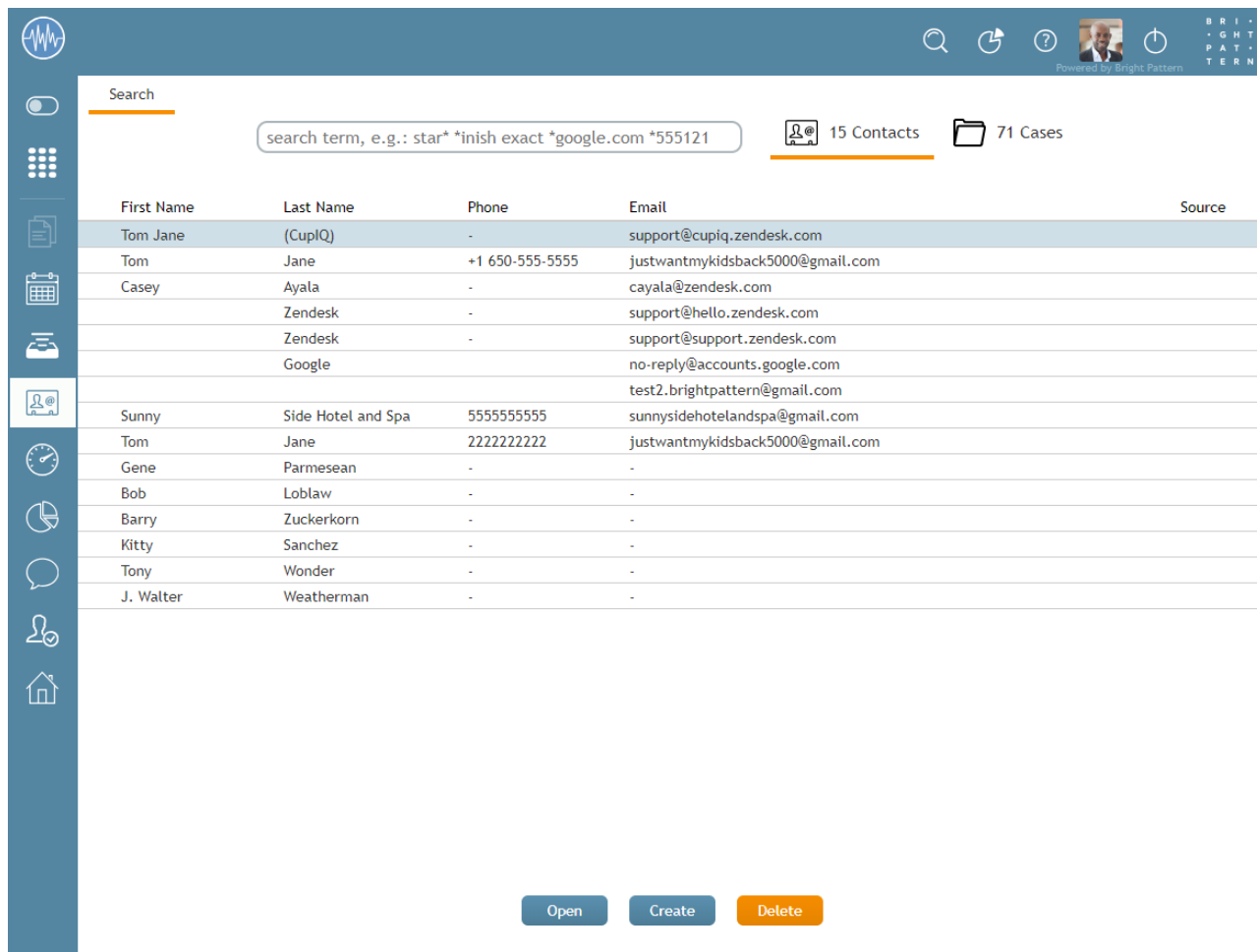
Search & Preview Records Interface

Search & Preview Records (formerly known as *Contacts*) is where cases and contact records are located, as well as a search bar that allows you to sort through them quickly and easily. The following is an overview of what you will see in this section of Agent Desktop.

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](#).

Main Page

The main page of Search & Preview Records comprises the three features of the section: the [search bar](#), [contacts](#), and [cases](#). Below these features, you will see your saved contacts, which can be accessed by highlighting a record and clicking the **Open**  button or double-clicking on the record. Additionally, you may add a contact by clicking the **Create**  button or remove a contact by clicking the **Delete**  button.



First Name	Last Name	Phone	Email	Source
Tom Jane	(CupIQ)	-	support@cupiq.zendesk.com	
Tom	Jane	+1 650-555-5555	justwantmykidsback5000@gmail.com	
Casey	Ayala	-	cayala@zendesk.com	
	Zendesk	-	support@hello.zendesk.com	
	Zendesk	-	support@support.zendesk.com	
	Google	-	no-reply@accounts.google.com	
			test2.brightpattern@gmail.com	
Sunny	Side Hotel and Spa	5555555555	sunnysidehotelandspa@gmail.com	
Tom	Jane	2222222222	justwantmykidsback5000@gmail.com	
Gene	Parmesean	-	-	
Bob	Loblaw	-	-	
Barry	Zuckerhorn	-	-	
Kitty	Sanchez	-	-	
Tony	Wonder	-	-	
J. Walter	Weatherman	-	-	

Search & Preview Records main screen

Search Bar

Located at the top of the section, the search bar allows you to search through cases and contact records; it is accessible whether you are on the [main page](#), looking in a [contact record](#), or at [cases](#). For more information about the types of searches you can conduct, see [Advanced Search](#).

Search



search term, e.g.: star* *inish exact *google.com *55512

Search bar

Contacts

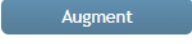
The *Contacts* section is where *contact records* are located. *Contact* records are the entries in your contact center's database containing customer information. When you open a contact record, you can view the contact's interaction history with your contact center as well as any saved personal data. This information is organized and separated by tabs.

Contact records contain the following buttons, which are accessible from any contact record tab:

- The **link**  button copies a shareable link of the contact to the clipboard, allowing you to paste the link elsewhere; this makes it possible for you to share the contact with other agents or supervisors in your contact center. Note that links may be pasted into your web browser's search bar or into the [search bar](#) to access the case. When a contact link is pasted, it will be presented in the format `<domain>/agentdesktop/contact/id/<id number>/<tab within case>` (e.g., `http[s]://YourCompany.brightpattern.com/agentdesktop/contact/id/5c6dad9d04fd75a777bdcfa/details`). For more information regarding how to manually alter this link, see [Using URL Variations To Access Case and Contact Information](#).
- The **Edit**  button allows you to edit the [details](#) of the contact record.

Details Tab

When a contact record is opened, the *Details* tab is the default view; it is where the contact's personal information is stored. Note that the types of information stored here will vary per contact center.

If your contact center is integrated with an external database (e.g., NextCaller), it is possible to merge matching customer contact information by clicking the **Augment**  button. Note the setting that allows augmentation must be configured by your administrator in order to work. For more information, see [How to Add to an Existing Contact](#).

The screenshot shows a CRM interface with a dark blue header and a vertical sidebar on the left. The header contains a search bar with 'Tom Jane' and a 'x' icon, a profile picture, and the text 'Powered by Insight Pattern'. The sidebar has icons for home, contact, calendar, and other functions. The main content area shows contact details for 'Tom Jane' with a 'TJ' avatar. The details include: First name: Tom, Last name: Jane, Mobile: +1 650-555-5555, Primary email: justwantmykidsback5000@gmail.com, Primary address: 123 Fake Street, Springfield, AK 01234, and Date of Birth. There are tabs for 'Details', 'Activities', 'Pending', and 'Cases'. A right sidebar has 'Edit' and 'Augment' buttons.

Search Tom Jane ×

Tom Jane

justwantmykidsback5000@gmail.com

+1 650-555-5555

Details Activities Pending Cases

First name: Tom

Last name: Jane

Mobile: +1 650-555-5555

Primary email: justwantmykidsback5000@gmail.com

Primary address: 123 Fake Street
Springfield
AK 01234

Date of Birth:

Segment:

Summary:

Augment

Edit

Details tab

Activities Tab

The *Activities* tab displays all activities that happened in your contact center related to a given contact; logged activities display information such as the time an activity occurred, what agent was involved, any [disposition](#) (i.e., including email dispositions), if it included an agent using Remote Assist, as well as subject and/or notes. For more information, see [Activities](#).

Search Tom Jane x

Tom Jane

justwantmykidsback5000@gmail.com

+1 650-555-5555

Details Activities Pending Cases

Time	Agent	Disposition	Subject, Notes
Jan 31	Liza Smith		justwantmykidsback5000@...
Jan 28	Michael Carter	Question answered	05:09
Jan 25	Michael Carter	Replacement sent	05:41
Jan 9	Michael Carter		RE: Replacement Cup JX3Z...
Oct 23, 2018	Michael Carter	Product sold	09:10

Tom Jane chatted on Jan 28, 2019, handled by Michael Carter

CuplQ Customer Service Chat

Monday, January 28, 2019

Tom Jane 10:36 am
My replacement cups haven't arrived yet and I would like to know the status.

Michael Carter 10:36 am
Hi, Tom! Thanks for reaching out to us again.

Michael Carter 10:36 am
If you give us a moment, we'll look into this.

Tom Jane 10:36 am
OK, thanks

Michael Carter 10:39 am
Hi, Tom. Thanks for waiting. Your cups were shipped to you on Friday afternoon and should arrive in three to five business days. The tracking number is XP12348-GH14723.

Tom Jane 10:39 am
Perfect. Thanks for your help!

Michael Carter 10:40 am
You're welcome and thanks for contacting CuplQ!

Michael Carter

Global Interaction ID 43AD11B6-98F4-450C

Verified Yes

Product Yes

CuplQ Chat: Question answered

Activities tab

Pending Tab

The *Pending* tab displays any cases that have not been assigned the [Resolved](#) or [Closed](#) states. Additionally, it is possible to select the [link button](#) in order to copy and paste a link to the case (i.e., in the *Case* area and not the *Contact* area). For more information about case states, see [Case State](#). For more information about the link button, see [Link button](#).

Search Tom Jane x

Tom Jane
justwantmykidsback5000@gmail.com
+1 650-555-5555

Details Activities **Pending** Cases

Time	Queue	Subject, Notes
Jan 24		#1060 New Replacement Cup
Dec 12, 2018		#1058 justwantmykidsback5000...

1060 New Replacement Cup

Tom Jane, reporter
Status: Pending
Reason: More customer info
Pinned by: Michael Carter

about your replacement cup, please let us know if you're still interested. Thanks very much!

Michael
Manager - CupIQ

Michael Carter

Subject RE: Replacement Cup
From justwantmykidsback5
Global Interaction ID 5AEC137F-2D14-4A74
Verified Product
CupIQ Customer Service

Michael Carter left a note on Jan 9, 2019 at 1:20 PM
Need more information

reported on Jan 10, 2019 at 2:39 PM
UNDELIVERED: RE: Replacement Cup JX3ZB61142LR35BWN
Delivery failed permanently

Michael Carter left a note on Jan 24, 2019 at 3:39 PM
Need more information

Pending tab

Cases Tab

The *Cases* tab displays [cases](#) that have been created for the contact. Additionally, it is possible to select the [link button](#) in order to copy and paste a link to the case (i.e., in the *Case* area and not the *Contact* area). For more information about cases, see [Cases, Email, and Threads](#). For more information about the link button, see [Link button](#).

Search Tom Jane x

Tom Jane justwantmykidsback5000@gmail.com +1 650-555-5555

Details Activities Pending **Cases**

Spam

Case Status: All		Resolved	Create time
<input type="checkbox"/>	Tom Jane justwantmykidsback5000@gmail.com	Resolved	Jan 31
<input type="checkbox"/>	Tom Jane New Replacement Cup	Pending	Jan 9
<input type="checkbox"/>	Tom Jane justwantmykidsback5000@gmail.com	Open	Dec 12, 2018
<input type="checkbox"/>	Tom Jane Broken 10 oz Cup	Resolved	Oct 23, 2018

1078 justwantmykidsback5000@gmail.com Tom Jane, reporter Status: Resolved

Product
General Email

Liza Smith left a note on Jan 31, 2019 at 2:16 PM
Problem solved

Tom Jane reported on Jan 31, 2019 at 2:17 PM
Re: justwantmykidsback5000@gmail.com JXLEL7R4WYAJZV4FGF
hello
On Thu, Jan 31, 2019 at 2:16 PM cs.brightpattern@gmail.com <cs.brightpattern@gmail.com> wrote:
test
--
Tom Jane
Actor
Upcoming Films: "Junk"

Liza Smith pulled from Team Queue "General Email" on Jan 31, 2019 at 2:17 PM

Liza Smith left a note on Jan 31, 2019 at 2:18 PM
Problem solved

Open

Cases tab

Cases

Search

search term, e.g.: star*inish exact "google.com"5551212 46 Contacts 15 Cases

Spam

Case Status: All	Shown: 15 of 15 total	Service: All	Belevance	Show/hide
<input type="checkbox"/>	Unidentified Edna Partee	Open	Jan 18	
<input type="checkbox"/>	Alexei Test #1 2022/02/03	Open	Feb 3	■■■■■
<input type="checkbox"/>	Mail Delivery System Undelivered Mail Returned to Sender Email Service #1	Open	Feb 7	■■■■■
<input type="checkbox"/>	Unidentified test #3 2/2/2022	Open	Feb 2	■■■■■
<input type="checkbox"/>	Alexei Attempt #6 2022/02/02	Open	Feb 2	■■■■■
<input type="checkbox"/>	Alexei test #1 bubenchikl Admin Admin	Open	Feb 7	
<input type="checkbox"/>	Alexei test #8 2022/02/02	Open	Feb 2	■■■■■
<input type="checkbox"/>	Unidentified test #5 02/02/2022	Open	Feb 2	
<input type="checkbox"/>	Unidentified Test #2 02/02/2022	Open	Feb 2	■■■■■
<input type="checkbox"/>	Unidentified Gerald Valentines	Open	Feb 8, 2021	
<input type="checkbox"/>	Unidentified test attachments Edna Partee	Open	Feb 8, 2021	
<input type="checkbox"/>	Unidentified Test #4 02/02/2022	Open	Feb 2	
<input type="checkbox"/>	Unidentified test #5 2022/02/02	Open	Feb 2	■■■■■
<input type="checkbox"/>	Alexei test #8 2022/02/02	New	Feb 2	
<input type="checkbox"/>	Alexei Test #7 2022/02/02	Open	Feb 2	

92677 Test #4 02/02/2022 Unidentified, reporter State: Open

Case created time 2022-02-03T00:17:49.248Z Contact first name activity history created time case number 92677 Content: Events

Edna Partee pulled from Team Queue "Email Service #1" on Feb 2, 2022 at 4:19 PM

Alexei, Edna Partee sent on Feb 2, 2022 at 5:00 PM To: Alexei

Re: Test #4 02/02/2022 JXWYHW8E1H6RJWYHYFYMM
Hmm a reply

Email Service #1

Edna Partee dispositioned email interaction Feb 2, 2022 at 5:54 PM
Need more information

Date: 02/02/2022 05:54 PM
Disposition: Need more information


NOTES

View Open


All cases

Cases are instances of customer service that are created to track all communications related to a specific customer request. Cases can be [created manually](#) in your contact center or automatically if they arrive there as email. Note that not all interactions that happen in your contact center will be considered cases; however, if an interaction has been made a case, it can be found here. For more information about cases, see [Cases, Email, and Threads](#). The Cases interface contains the following buttons and filters.


Spam button


The **spam**  button removes the selected cases from this section. Note that this button does not function as a spam filter; spam filters are managed by your contact center's administrators.

Trash button

The **trash**  button deletes cases. Note that this button is available for supervisors only.


Link button

The **link**  button copies a shareable link of the case to the clipboard, allowing you to paste the link elsewhere; this makes it possible for you to share the case with other agents or supervisors in your contact center. Note that the case link button can be found in the Contact's [Pending tab](#) and [Cases tab](#).

Note that links may be pasted into your web browser's search bar, into the [search bar](#), or the *Contact Search*  shortcut found at the top of the screen to access the case.

When a case link is pasted, it will be presented in the format `<domain>/agentdesktop/case/id/<actual id number>` (e.g., `http[s]://YourCompany.brightpattern.com/agentdesktop/case/id/5ca2f3eed04fd756afcca6c6`). For more information regarding how to manually alter this link, see [Using URL Variations to Access Case and Contact Information](#).

Create a follow-up case button

The **Create a follow-up case**  button is available for cases with a [Closed](#) state only. Clicking this button allows you to [create a new case](#). For more information, see [How to Use Cases to Send a Follow-up Outbound Email](#).

Static Elements

Shown

The *Shown* element is the [searched-for](#) or displayed number of cases out of the total number of all search results.

<input type="checkbox"/> Case Status: All		Shown: 3 of 3 total	Service: All	Spam	Relevance ▼
<input type="checkbox"/>	Unidentified Aiden Bookbinder	Liza Smith	Resolved		Nov 10
<input type="checkbox"/>	Unidentified Re: Just curious	Liza Smith	New		Nov 10 ■■■■■■
<input type="checkbox"/>	Aiden Bookbinder Aiden Bookbinder Needs Help		Pending		Nov 10

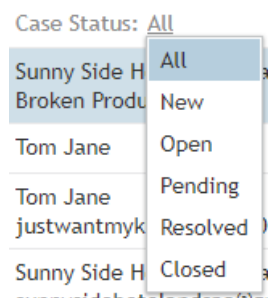
Shown cases

Case Filters

The following filters are available for cases.

Case State

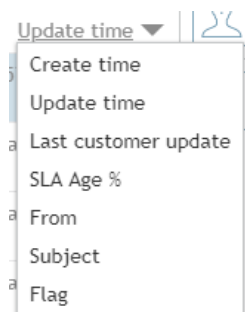
The *Case State* filter allows you to sort cases per assigned State. For more information, see [For more information, see *Case State*.](#)



Case State filter

Case details

The *case details* filter allows you to sort emails by pertinent details; this filter includes a further option to organize by **ascending/descending** order by clicking the grey triangle ▼. For more information, see [My Cases Interface](#).



Services

The *services* filter allows users to search cases by service if a user has the [See other agents' cases](#) privilege enabled. The two available filter options are *Team's Assigned Services* and *All*. The *Team's Services* filter, when selected, restricts the cases found to those that belong to the user's team only, including all cases where the logged-in user participated. If the user has no *See other agents' cases* privilege, neither selectors are displayed and the search results only include the cases where the logged-in user participated.

The screenshot shows a search interface with a search bar containing the text "search term, e.g.: star* *finish exact *google.com *5551212". To the right of the search bar, there are icons for "9 Contacts" and "81 Cases". Below the search bar, there are several filters, including "Case Status: All", "Spam", and "Relevance". A dropdown menu for "Service" is open, showing two options: "All" and "Team's Assigned Services". The "All" option is currently selected. The main content area displays a list of cases with columns for checkboxes, case titles, status, and dates. On the right side, there is a detailed view of a case titled "1007 Password needed" with a state of "Closed". The case details include a message from "Unidentified, reporter" and a list of events, such as "Christy Borden changed case state to Resolved on Mar 18, 2021 at 5:43 PM" and "Christy Borden dispositioned email interaction Mar 18, 2021 at 5:43 PM".

Teams

There is an additional filter for supervisors called *Teams Selector* that permits the supervisor to select a team from the list of teams they supervise. If you are a supervisor, you may also see a filter that allows you to limit the search to cases assigned to a specific team (i.e., as opposed to all teams that you are assigned to supervise).

Case Properties

Case content properties display case-related data (e.g., State, Data, SLA, etc.). You may choose which properties are displayed by selecting the desired data element checkbox in the *Show/hide* drop-down menu. Note that the selection checkbox as well as the *contact/subject* property are not removable.

The configurable properties are as follows.

All

Displays all configurable content properties, specifically:

- Category
- Location
- State
- Date
- SLA
- Last Service
- Disposition

Contact

Displays the contact's name and title; this property is not removable

Location

The *location* element is where the case is located; the location is displayed inline per case. If the case is in an agent's personal queue, the agent's name will be displayed; if the case is located in a specific team queue, the name of the corresponding email service will be displayed.



<input type="checkbox"/>	Case Status: All	Shown: 3 of 3 total	Service: All	Relevance ▼	Spam	
<input type="checkbox"/>	Unidentified Aiden Bookbinder	Liza Smith	Resolved	Nov 10		
<input type="checkbox"/>	Unidentified Re: Just curious	Liza Smith	New	Nov 10	■■■■■	
<input type="checkbox"/>	Aiden Bookbinder Aiden Bookbinder Needs Help		Pending	Nov 10		

Case location

State

Displays the current [case state](#).

Date

Displays the date associated with the option selected in the [case details](#) filter

SLA

Displays the target time bar, which is a visual indicator of SLA

Last Service

Displays the name of the service associated with the most recent interaction of the case

Disposition

Displays the name of the disposition of the last activity associated with the case

Restore Default

When selected, the displayed configurable properties will be restored to the system default; the default properties are as follows:

- Location
- State
- Date
- SLA

Case State

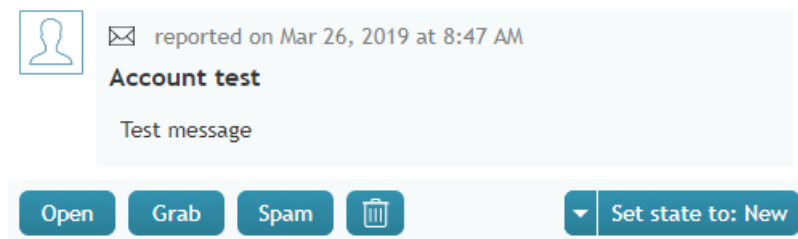
Agent Desktop allows you to assign *state* to cases, which may be used to organize and classify your case workload. The activity history for changes in the case state can be [searched](#), that is, if a case changes from *New* to *Open* or from *Open* to *Pending*, that is tracked as well.

For more information about cases, see [My Cases Interface](#) and [Search & Preview Records Interface](#).

The following states can be applied to cases.

New

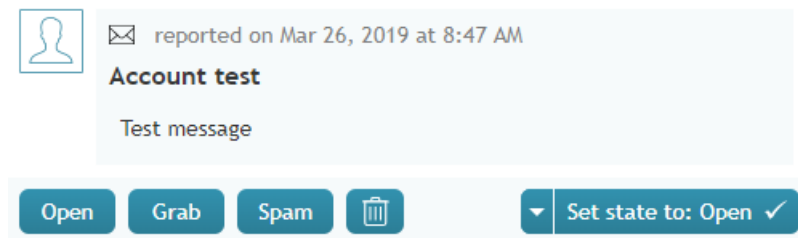
This state is for new, unopened cases.



The *New* case state

Open

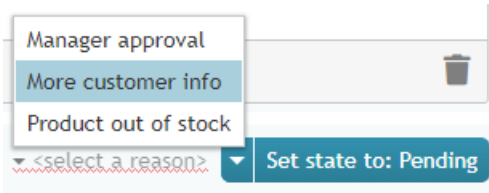
This state is for cases that have been opened but are not yet processed.



The *Open* case state

Pending

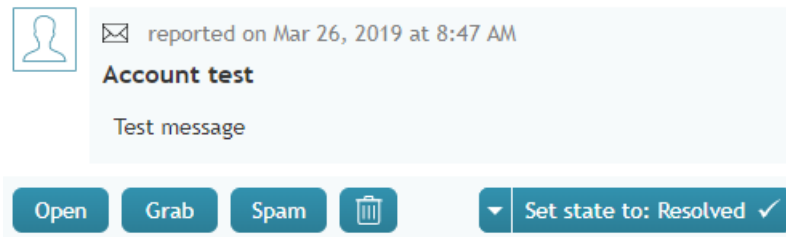
This state is for cases that require further action. When a case is marked as Pending, you must select a corresponding Case Pending Reason. Case Pending Reasons are defined by your system administrator and allow you to provide additional information as to why a case is pending.



The Pending state with pending reason

Resolved

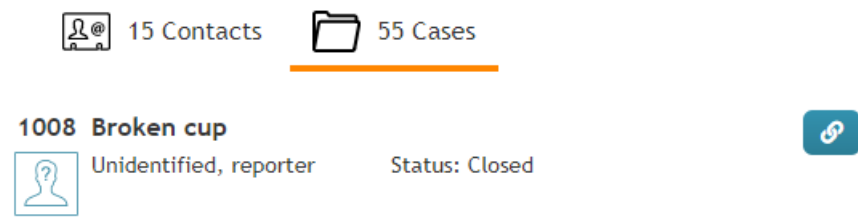
This state is for cases that are completed. Note that cases marked as *Resolved* will automatically switch to the *Open* state if a new email is received or if the agent uses the case on any interaction. Cases marked as *Resolved* can have changes made to them and will stay in the *Resolved* state for a period of time as configured by your administrator; after this point, the case will be [Closed](#). Additionally, when marking a case as *Resolved*, you will have the opportunity to disposition it.



The Resolved case state

Closed

This state is for cases that have exceeded the period of [Resolved](#) days (as configured by your administrator). Changes cannot be made to closed cases; however, it is possible to create a [follow-up case](#) from a closed case.



The Closed state

Case Activity

The change in case state activity can be tracked on the [Details Tab](#) page. Clicking the link beside the Case Status will allow you to sort between cases currently in the various states: *All, New, Open, Pending, Resolved, and Closed*.

The screenshot shows a CRM interface for 'Gondor Inn & Spa'. The top navigation bar includes a search icon, a refresh icon, a help icon, a settings icon, and a power icon. The main header displays the company logo 'GI', the name 'Gondor Inn & Spa', and the email address 'gondorinnandspa@gmail.com'. Below the header, there are tabs for 'Details', 'Activities', 'Pending', and 'Cases'. The 'Cases' tab is active, showing a list of cases with columns for checkboxes, case names, states, and create times. A 'Spam' button is visible above the list. On the right side, there is a summary card for a case with a value of '1026 元', the name 'Gondor Inn & Spa, reporter', and the state 'Open'. Below the list, there are 'View' and 'Open' buttons.

<input type="checkbox"/>	Case Name	State	Create time
<input type="checkbox"/>	Gondor Inn & Spa 元	Open	Aug 20
<input type="checkbox"/>	Gondor Inn & Spa Test	Resolved	Aug 20
<input type="checkbox"/>	Gondor Inn & Spa Testing Gondor Inn and Spa Email Outgoing	Open	Aug 18
<input type="checkbox"/>	Gondor Inn & Spa UNDELIVERED: Unsolicited Outbound Email	Pending	Aug 17
<input type="checkbox"/>	Gondor Inn & Spa Unsolicited Outbound Email Test	Open	Aug 16
<input type="checkbox"/>	Gondor Inn & Spa TEST	Open	Aug 16

Cases