



## 5.8 Search Tutorials

### Bright Pattern Documentation

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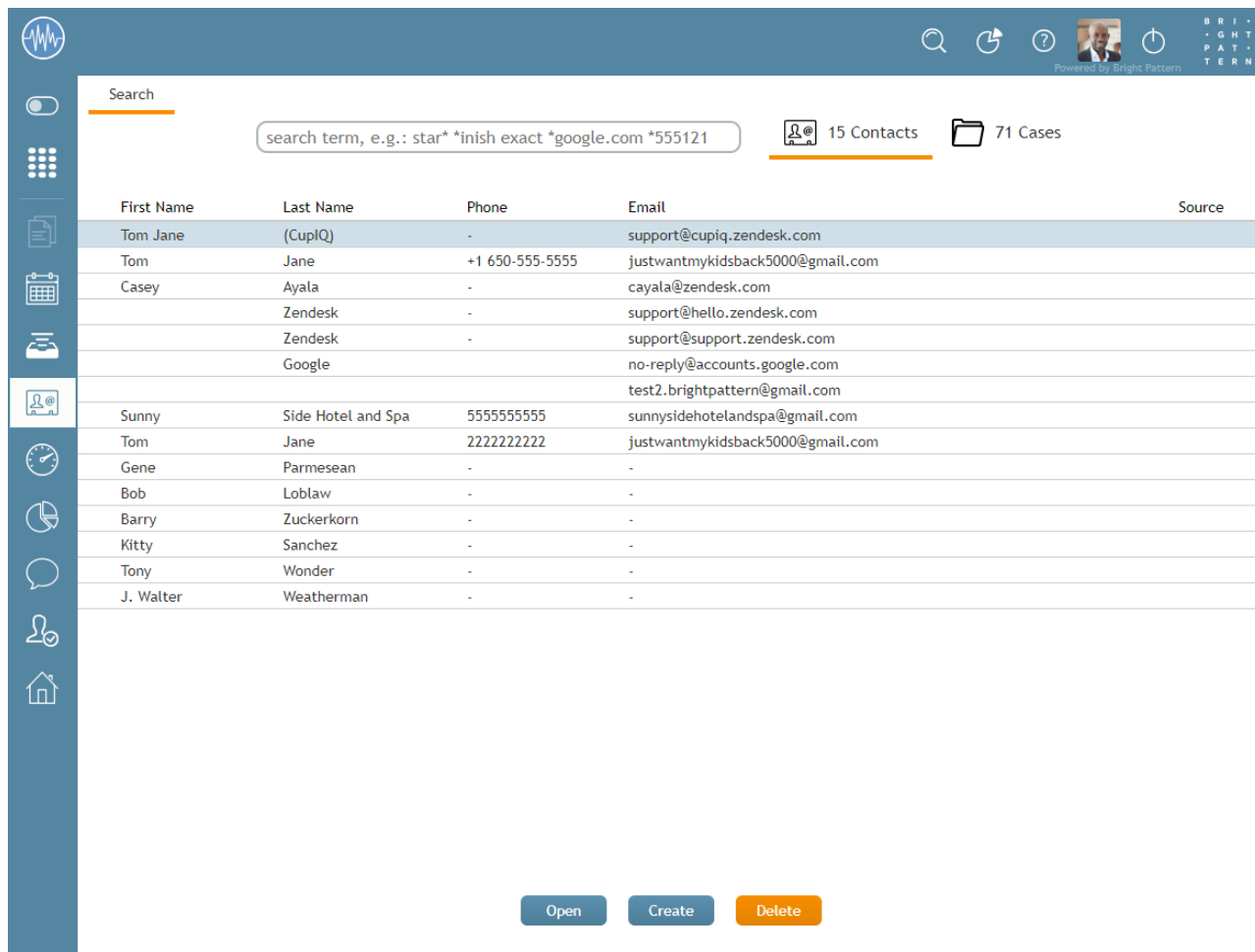
# Search & Preview Records Interface

*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.



The screenshot displays the Search & Preview Records main screen. At the top, there is a search bar with the text "search term, e.g.: star\* \*inish exact \*google.com \*555121". To the right of the search bar, there are icons for "15 Contacts" and "71 Cases". Below the search bar is a table of contacts with the following columns: First Name, Last Name, Phone, Email, and Source. The table contains 15 rows of contact information. At the bottom of the screen, there are three buttons: "Open", "Create", and "Delete".

First Name	Last Name	Phone	Email	Source
Tom	Jane	-	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	sunnysidehotellandspa@gmail.com	
Tom	Jane	2222222222	justwantmykidsback5000@gmail.com	
Gene	Parmesean	-	-	
Bob	Loblaw	-	-	
Barry	Zuckerborn	-	-	
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

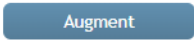
The *Contacts* section is where *contact records* are located. *Contact* records are the entries in your contact center's database containing customer information. When you open a contact record, you can view the contact's interaction history with your contact center as well as any saved personal data. 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 are organized into tabs: 'Details' (selected), 'Activities', 'Pending', and 'Cases'. The 'Details' tab shows fields for 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 also fields for Segment and Summary. Action buttons for 'Edit' and 'Augment' are visible.

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

Edit

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 Create time

Case	Status	Create time
Tom Jane justwantmykidsback5000@gmail.com	Resolved	Jan 31
Tom Jane New Replacement Cup	Pending	Jan 9
Tom Jane justwantmykidsback5000@gmail.com	Open	Dec 12, 2018
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

Case	Status	Create time
Unidentified Edna Partee	Open	Jan 18
Alexei Test #1 2022/02/03	Open	Feb 3
Mail Delivery System Undelivered Mail Returned to Sender	Open	Feb 7
Unidentified test #3 2/2/2022	Open	Feb 2
Alexei Attempt #6 2022/02/02	Open	Feb 2
Alexei test #1 bubenchikl	Open	Feb 7
Alexei test #8 2022/02/02	Open	Feb 2
Unidentified test #5 02/02/2022	Open	Feb 2
Unidentified Test #2 02/02/2022	Open	Feb 2
Unidentified Gerald Valentines	Open	Feb 8, 2021
Unidentified test attachments	Open	Feb 8, 2021
Unidentified Test #4 02/02/2022	Open	Feb 2
Unidentified test #5 2022/02/02	Open	Feb 2
Alexei test #8 2022/02/02	New	Feb 2
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: <a href="#">All</a>		<span style="border: 1px solid red; padding: 2px;">Shown: 3 of 3 total</span>	Service: <a href="#">All</a>	<a href="#">Spam</a>	<a href="#">Relevance</a> ▼
<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

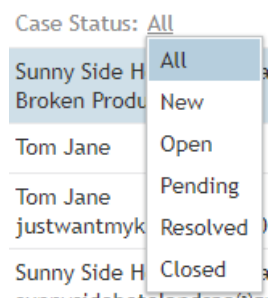
Shown cases

## Case Filters

The following filters are available for cases.

### Case State

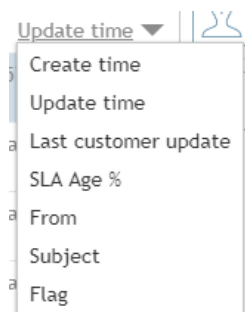
The *Case State* filter allows you to sort cases per assigned State. For more information, see [For more information, see \*Case State\*](#).



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 is a "Service:" dropdown menu with a red box around it, showing two options: "All" and "Team's Assigned Services". The main area displays a list of cases with columns for checkboxes, case 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 detailed view includes a signature block for "Cheyenne Evers" from "BrightBank Lending", an email interaction history, and buttons for "View" and "Create follow up case".

## 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: <a href="#">All</a>	Shown: 3 of 3 total	Service: <a href="#">All</a>	<a href="#">Relevance</a> ▼	<a href="#">Spam</a>	
<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

# 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](#)

# Advanced Search

As you work with more customers and fulfill their requests, you will accumulate an extensive collection of cases and contacts. Utilizing advanced search features, you can search through your customer information easily in any language.

Note the privilege to search cases and contacts must be enabled by your contact center's administrator.

Search

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

Search strings are typed into the search field

## Where to Make Advanced Searches

Advanced searches are made in Agent Desktop, section [Search & Preview Records](#), in the **search term** field. You can search for a wide variety of case and contact information including email addresses, names, date of birth, case numbers, email addresses, and so forth. In the search results, the first 200 cases/contacts are displayed, with the newest entries displayed first.

## About Search Strings and Keywords

*Search strings* are any combination of letters, characters, and numbers entered in the search field with the intent of finding matching information. Search strings are used in conjunction with keywords to conduct advanced searches.

*Keywords* are words that precede search strings and act as filters to help you find specific kinds of content quickly.

*Operators* such as AND and OR allow you to combine multiple search conditions. For examples, see the "How to use it" and "Example search" notes for each keyword below.

## Search Results

Search results are displayed below the search term field, indicating the shown number of matches.

<input type="checkbox"/>	Case Status: <a href="#">All</a> Shown: 200 of 1500 total	SL Age %
<input type="checkbox"/>	Danny Glover    CS - Questions        Apr 8    ■■■■■□	
<input type="checkbox"/>	Lorem ipsum dolor sit amet, consetetur sadipscing elitr	
<input type="checkbox"/>	Joanne Wengler     Agent Joe    Apr 8    ■■■■■□	
<input checked="" type="checkbox"/>	How to replace toner on cn5100	
<input type="checkbox"/>	Danny Glover    CS - Questions         Apr 8    ■■■■■□	
<input type="checkbox"/>	My order did not arrive	
<input type="checkbox"/>	Joanne Wengler    PC Support - Questions    Apr 8    ■■■■■□	
<input checked="" type="checkbox"/>	How to replace toner on cn5100	
<input type="checkbox"/>	Joanne Wengler     Agent Michael    Apr 8    ■■■■■□	
<input checked="" type="checkbox"/>	How to replace toner on cn5100	

Advanced search results

## Available Keywords

The following is a list of recognized keywords; they are organized by either case or contact.

### Case Keywords

#### category

**What it does:** The *category* keyword filters cases by category.

**How to use it:** The search string can be enclosed in double quotes; however this is optional. Without double quotes, only the first word will be associated with the keyword's search.

**Example search:** *category: "My Team's Service"*

#### created

**What it does:** The *created* keyword filters cases by creation date.

**How to use it:** The keyword and search string can be separated by the following: =, <, >, >=, <=; the search string shall correspond to the most preferred language/country combination set in your browser. For example, if your preferred combination is *English (United States)*, the expected format will be *mm/dd/yyyy*, whereas for *English (New Zealand)* it will be *dd/mm/yyyy*. The ISO 8601 date format *yyyy-mm-dd* is supported for all language/country settings.

**Example search:**

- *created = 08/01/2018*
- *created > 8/1/2018*
- *created > 8/1/2018 AND created < 8/16/2018*

## disposition

**What it does:** The *disposition* keyword returns cases containing the specified disposition in any of its associated activities.

**How to use it:** The search string may be enclosed in double quotes (optional) but it is recommended for multi-word searches; without double quotes, the search will use only the first word after the keyword.

**Example search:** *disposition: "Silence"*

## email\_text

**What it does:** The *email\_text* keyword finds text contained within the body of an email associated with a case.

**How to use it:** The search string may be enclosed in double quotes (optional) but it is recommended for multi-word searches; without double quotes, the search will use only the first word after the keyword.

**Example search:** *email\_text: "broken on arrival"*

## flagged

**What it does:** The *flagged* keyword filters cases that were flagged

**How to use it:** The search string can contain the following option: "true" or "false"

**Example search:** *flagged: true|false*

## last\_disposition

**What it does:** The *last\_disposition* keyword returns cases containing the specified disposition in the last associated activity. The search is limited to activity types that may have a disposition (i.e., if the last activity does not have a disposition field at all, the search will be extended to the previous activity).

**How to use it:** The search string may be enclosed in double quotes (optional) but it is recommended for multi-word searches; without double quotes, the search will use only the first word after the keyword.

**Example search:** *last\_disposition: "No answer"*

## modified

**What it does:** The *modified* keyword filters/sorts cases by the last date of modification.

**How to use it:** Same as [created](#) (see above)

**Example search:**

- *modified > 08/01/2018*
- *modified > 8/1/2018*
- *modified > 8/1/2018 AND modified < 8/16/2018*

<number>

**What it does:** The *number* search finds cases by state number; note that the option to search by number does not require the specific keyword *number*.

**How to use it:** Entering a search string consisting only of numbers will launch a search for the matching case number.

**Example search:** *12345*

## note

**What it does:** The *notes* keyword finds text contained in the notes records from a case's activity history.

**How to use it:** The search string may be enclosed in double quotes (optional) but it is recommended for multi-word searches; without double quotes, the search will use only the first word after the keyword.

**Example search:** *note: "Replacement requested"*

## pending\_reason

**What it does:** The *pending\_reason* keyword filters [Pending](#) cases by the specific Pending reason; note that these will be specific to your call center.

**How to use it:** The search string can be enclosed in double quotes; however, this is optional. Without double quotes, only the first word will be associated with the keyword's search.

**Example search:** *pending\_reason: "Needs manager approval"*

## reporter

**What it does:** The *reporter* keyword filters cases by the name of the customer/ person who contacted your call center.

**How to use it:** The search string should be enclosed in double quotes. Without double quotes, the search will use the first two words after the keyword. If more than two words are typed in double quotes, the search is split on the first space and will match the rest against the last name. Note that partial names can be entered as well (e.g., name: J D).

**Example search:** *reporter: "John Doe"*

## service

**What it does:** The *service* keyword filter cases by the services of interactions associated with the case.

**How to use it:** The search string may be enclosed in double quotes (optional) but it is recommended for multi-word searches; without double quotes, the search will use only the first word after the keyword. Additionally, you may include the Boolean operator *AND* followed by an additional search term; this will find all emails and cases that contain the additional search term in the subject and/or body and are assigned to the service.

**Example search:** *service: "Maintenance Renewal" AND subscription*

## state

**What it does:** The *state* keyword filters cases by their states.

**How to use it:** The keyword and search string should be separated by a colon (:); multiple values can be separated by OR. **Note that in the current version state is case sensitive.**

**Example search:** *state: New OR Open*

## subject

**What it does:** The *subject* keyword finds text contained in an email's subject line.

**How to use it:** The search string may be enclosed in double quotes (optional) but it is recommended for multi-word searches; without double quotes, the search will use only the first word after the keyword.

**Example search:** *subject: "forgot password"*



## Contact Keywords

### address

**What it does:** The *address* keyword filters contacts by the contact record fields associated with address; the recognized fields are the following: address line 1 or address line 2, city, state/province, and postcode

**How to use it:** The keyword and search string should be separated by a colon (:)

**Example search:** *address: 123 Fake St.*

### company\_name

**What it does:** The *company\_name* keyword finds contacts with a matching company name.

**How to use it:** The keyword and search string should be separated by a colon (:) and the search string can be enclosed in double quotes. Note that partial names can be entered.

**Example search:** *company\_name: "Warehousing Inc"*

### dob

**What it does:** The *dob* keyword finds contacts with a matching date of birth.

**How to use it:** The keyword and search string should be separated by a colon (:). Also, the month-date versus date-month order should be specific to your country (e.g., mm/dd/yyyy for the US).

**Example search:** *dob: 07/30/1983*

### email

**What it does:** The *email* keywords finds contacts with a matching email address.

**How to use it:**

- Use **email:** filter, followed by the desired part of the email address, to search for any part of an email address (e.g., **email:masha**). A search for "email:ma" could return results such as "example@gmail.com," "masha@example.com," and so forth.
- Include the "@" symbol to find email addresses (e.g., **masha@**).
- Put the email address in quotes to find only complete email addresses (e.g., "**masha@gmail.com**"). These email addresses can be in the email address fields or anywhere else in text, such as in the email body, the subject line, or in notes.
- Enter the email address without quotes to get the widest possible search (e.g., **masha@gmail.com**). Without quotes, the search treats periods and the "@" sign as whitespace. Without quotes, the search splits the email address into individual words and tries to find emails/cases with the most matching words. Such a search, for example might even bring up another contact's email because some matching words appeared in the case history.
- Place an asterisk (\*) in front of partial email addresses to search for matches (e.g., **\*masha@**). The asterisk serves as a wildcard.

**Example search:** *email: john@doe.com, email:john, john@, "john@doe.com", john@doe.com, \*john@*

### first\_name

**What it does:** The *first\_name* keyword finds contacts with a matching first name.

**How to use it:** The keyword and search string should be separated by a colon (:). Note that partial names can be entered.

**Example search:** *first\_name: John*

### last\_name

**What it does:** The *last\_name* keyword finds contacts with a matching first name.

**How to use it:** The keyword and search string should be separated by a colon (:). Note that partial names can be entered.

**Example search:** *last\_name: Doe*

## name

**What it does:** The *name* keyword finds contacts with a matching first and last name.

**How to use it:** The keyword and search string should be separated by a colon (:). The search string should be enclosed in double quotes. Without double quotes, the search will use the first two words after the keyword. If more than two words are typed in quotes, the search is split on first space, matching the rest against the last name. Note that partial names can be entered as well (e.g., name: J D).

**Example search:** *name: "John Doe"*

## phone

**What it does:** The *phone* keyword finds contacts with a matching phone number.

**How to use it:** The keyword and search string should be separated by a colon (:).

**Example search:** *phone: (415) 555 1212*

## position

**What it does:** The *position* keyword finds contacts with a matching position.

**How to use it:** The keyword and search string should be separated by a colon (:). Note that partial words can be entered.

**Example search:** *position: Engineer*

## segment

**What it does:** The *segment* keyword finds contacts with a matching segment.

**How to use it:** The keyword and search string should be separated by a colon (:). Note that partial words can be entered.

**Example search:** *segment: gold*

## title

**What it does:** The *title* keyword finds contacts with a matching title (e.g., Mr., Mrs., Miss).

**How to use it:** The keyword and search string should be separated by a colon (:).

**Example search:** *title: Mr.*

## URL


**What it does:** The *URL* keyword finds contacts with a matching company URL.

**How to use it:** The keyword and search string should be separated by a colon (:). A substring can be typed (i.e., "example" must match "www.example.com"). Note that the keyword is not case specific.


**Example search:** *url: "www.example.com"*

# Using URL Variations To Access Case and Contact

# Information

In [Search & Preview Records](#), you may notice the *link* button . This button copies the URL of [case](#) or [contact](#) information to the clipboard, making it possible for you to paste and share the URL with other agents or supervisors in your contact center.

It is possible, however, to bypass using the link button and instead manually enter the same URL information or variations of it; manually entering such information may allow you to access more specific case and contact information.

The following is a list of recognized URL variations that may be manually entered to allow you access to specific case and contact information. URLs may be entered 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.

## Cases URL Variations

If using the [cases link button](#), the pasted URL will be presented in the format `<domain>/agentdesktop/case/id/<actual id number>` (e.g., `http[s]://YourCompany.brightpattern.com/agentdesktop/case/id/5ca2f3eed04fd756afcca6c6`).

The following is a list of recognized URL variations that may be manually entered to access case information:

- `<domain>/agentdesktop/case/number/<case number>` (e.g., `http[s]://YourCompany.brightpattern.com/agentdesktop/case/number/1099`)
- `<domain>/agentdesktop/case/<case number>` (e.g., `http[s]://YourCompany.brightpattern.com/agentdesktop/case/1099`)

If case links are pasted in internal chats, they may be displayed in the following formats for the most compact view:

- `case/id/<id>` (e.g., `case/id/5ca2f3eed04fd756afcca6c6`)
- `case/number/<case number>` (e.g., `case/number/1099`)
- `case/<case number>` (e.g., `case/1099`)

## Contact URL Variations

If using the [contacts link button](#), the pasted URL 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`).

The following is a list of recognized URL variations that may be manually entered to access contact information:

- `<domain>/agentdesktop/contact/id/<id>/<optional tab within case>` (e.g., `http[s]://YourCompany.brightpattern.com/agentdesktop/contact/id/5c6dad9d04fd75a777bdcfa`)
- `<domain>/agentdesktop/contact/currentcontact/<details|activities|pending|cases>` (e.g., `http[s]://YourCompany.brightpattern.com/agentdesktop/contact/currentcontact/details`)

If contact links are pasted in internal chats, they may be displayed in the following formats for the most compact view:

- `contact/id/<id>` (e.g., `contact/id/5c6dad9d04fd75a777bdcfa`)

