5.8 Contacts Overview

Bright Pattern Documentation

Generated: 5/26/2022 8:33 pm

Table of Contents

Contact Import & Export

Contact Import & Export is where you are able to import, export, and delete bulk contacts for use in Agent Desktop. Note that this section replaces and removes the *Bulk Export/Import Contacts* feature from the Agent Desktop Search & Preview Records screen. Note that contact information may be retrieved via the Scenario Builder's application's Bright Pattern Search Object block.

Contact Import & Export

Contact Import & Export Tab

The *Contact Import & Export* tab is where you may initiate import, export, and deletion of bulk contacts. Additionally, the total number of contacts currently in your database is listed here.

Import

The **Import** option allows you to upload bulk contacts through an import dialog window.

Import dialog window

Name and Source Tab

Data Source

Data Source allows you to select from the following options.

Upload

This option allows you to upload a .TXT or .CSV file.

FTP or SFTP

This option allows you to select either **FTP** or **SFTP** and then enter the access URL.

Username

This is the username of the FTP or SFTP site.

Password

This is the password of the FTP or SFTP site.

List format

If you previously saved a list format, you may choose to import your contacts in this format.

Format Options Tab

The *Format Options* tab allows you to customize the format of your import records.

Import Format Options tab

File Input Encoding

First line contains field names

When enabled, this checkbox will recognize the first line or row of your upload as the names of the contacts fields.

Input file encoding

This option allows you to select the encoding for your import file; select the encoding type from the drop-down menu.

Field separator options

The field separator options are as follows: **Comma**, **Tab**, **Semicolon**, and **Custom**.

Fields Tab

The fields selector maps the fields from the import source to fields of contact and company objects. If your import source does not contain fields currently recognized in the database, this selector allows you to map them as needed. When you select a field in the field map, the following information will display.

Import Fields tab

Selected field

This is the field you have selected.

Mapped to

The *Mapped to* menu displays where the selected field is currently mapped to. To change where the field is mapped to, select a new field from the menu.

Note: When mapping the phone number field, please note that the number format may be different depending upon which country you are configuring the phone number for. Under *Phone Options*, there is a drop-down option labeled *The numbers are in the format for:* with the choice of *Other countries or multiple countries* or *United States and Canada*.

2021.09.27 AD InternationalContact.CVSUploadExport.Screenshot.png

Save new list format as

After mapping your import fields, the *Save new list format as* dialog window will pop up. From here, you will have the option to save this import as a new format list. Note your import will not be affected if you choose not to save a new list format.

Save new list format as dialog window

Import Format

The Contact Center Administrator application allows you to import contacts, including their addresses, email addresses, external IDs, and other properties in bulk, by uploading a specially formatted spreadsheet.

If creating a spreadsheet from scratch isn't optional, you may export your existing contacts list, change it, and upload it back. Opening the exported contact list spreadsheet will provide you with the list of named fields. This allows you to identify the precise information to be found within the individual columns.

Import and export operations are activated by the **Import** and **Export** buttons. Both the .TXT and the .CSV file formats are supported for import and export.

Note that third-party messenger services (e.g., Facebook, Telegram, etc.) all follow the same pattern and do not disclose the real user identities. When uploading customer messenger contact information, it is required that both the *messengers.<n>.id field* and the *messengers.<n>.user_id* have values. Bright Pattern Contact Center software uses these two values in place of the real user identities.

The Import/Export fields are as follows:

Field Name	Description
id	ID number for the record
first_name	Customer's first name
last_name	Customer's last name
title	Customer's title
position	Customer's position within the company
summary	Summary information regarding the client
segment	Gold, Silver, Bronze (drop-down selection)
dob	Date of birth
bpo_client	Name of BPO client. This is a symbolic name, not an ID
emails.0.type	Can be primary, business, or private
emails.0.email_address	First email address entered
emails.1.type	Can be primary, business, or private
emails.1.email_address	Second email address entered
emails.2.type	Can be primary, business, or private
emails.2.email_address	Third email address entered.
phones.0.type	Can be business, home, mobile, or fax
phones.0.phone	First phone number entered
phones.1.type	Can be business, home, mobile, or fax
phones.1.phone	Second phone number entered
phones.2.type	Can be business, home, mobile, or fax
phones.2.phone	Third phone number entered
phones.3.type	Can be business, home, mobile, or fax
phones.3.phone	Fourth phone number entered
phones.4.type	Can be business, home, mobile, or fax
phones.4.phone	Fifth phone number entered
addresses.0.type	Can be primary, billing, shipping, or other
addresses.0.address_line1	First address line
addresses.0.address_line2	Second address line
addresses.0.city	City
addresses.0.state	State
addresses.0.postcode	ZIP Code or postal code
addresses.0.country	Country
addresses.1.type	Can be primary, billing, shipping, or other
addresses.1.address_line1	First address line

addresses.1.address_line2	Second address line
addresses.1.city	City
addresses.1.state	State
addresses.1.postcode	ZIP Code or postal code
addresses.1.country	Country
addresses.2.type	Can be primary, billing, shipping, or other
addresses.2.address_line1	First address line
addresses.2.address_line2	Second address line
addresses.2.city	City
addresses.2.state	State
addresses.2.postcode	ZIP Code or postal code
addresses.2.country	Country
addresses.3.type	Can be primary, billing, shipping, or other
addresses.3.address_line1	First address line
addresses.3.address_line2	Second address line
addresses.3.city	City
addresses.3.state	State
addresses.3.postcode	ZIP Code or postal code
addresses.3.country	Country
addresses.4.type	Can be primary, billing, shipping, or other
addresses.4.address_line1	First address line
addresses.4.address_line2	Second address line
addresses.4.city	City
addresses.4.state	State
addresses.4.postcode	ZIP Code or postal code
addresses.4.country	Country
company.company_name	Name of company
company.revenue	Company revenue
company.employees	Number of employees employed at the company
company.web_url	Company website address
external_ids.0.type	Zendesk, Salesforce (Reserved)
external_ids.0.id	UUID, for update only (Reserved)
external_ids.1.type	Zendesk, Salesforce (Reserved)
external_ids.1.id	UUID, for update only (Reserved)
external_ids.2.type	Zendesk, Salesforce (Reserved)
external_ids.2.id	UUID, for update only (Reserved)
external_ids.3.type	Zendesk, Salesforce (Reserved)
external_ids.3.id	UUID, for update only (Reserved)
messengers.0.type	Messenger name/type (e.g., LINE, Facebook, Telegram, etc.) (Reserved)
messengers.0.id	Contact Center’s integration account ID (Reserved)
messengers.0.user_id	Contact’s external messenger ID (e.g., Facebook, etc.) (Reserved)
messengers.1.type	Messenger name/type (e.g., LINE, Facebook, Telegram, etc.) (Reserved)

messengers.1.id	Contact Center's integration account ID (Reserved)
messengers.1.user_id	Contact's external messenger ID (e.g., Facebook, etc.) (Reserved)
messengers.2.type	Messenger name/type (e.g., LINE, Facebook, Telegram, etc.) (Reserved)
messengers.2.id	Contact Center's integration account ID (Reserved)
messengers.2.user_id	Contact's external messenger ID (e.g., Facebook, etc.) (Reserved)
messengers.3.type	Messenger name/type (e.g., LINE, Facebook, Telegram, etc.) (Reserved)
messengers.3.id	Contact Center's integration account ID (Reserved)
messengers.3.user_id	Contact's external messenger ID (e.g., Facebook, etc.) (Reserved)
created_time	Time the contact was created
modified_time	Time the contact was modified

Results Tab

The *Results* tab displays the results from the attempted import as the following.

Import Results tab

- **Records read** - The number of records read
- **Contacts created** - The number of contacts created
- **Contacts updated** - The number of contacts with updated information
- **Companies created** - The number of companies created
- **Errors detected** - The number of errors detected in the attempted import

Note: If your import contains errors, you will be able to download a .CSV file listing the errors.

Export

The **Export** action allows you export contacts from your database in two ways:*All Contacts* or *Modified since*.

Note that you may choose the **Export** action to download a template of what the current contact and company fields are.

Export dialog window

All Contacts

The *All Contacts* option will export all contacts in your database.

Modified since

The *Modified since* option allows you to export contacts that have been modified from a set date; you may select the date in the calendar.

Delete

The **Delete** option allows you to remove bulk contacts from your database through a dialog window similar to the one for *Import*. The *Name and Source*, *Format Options*, and *Results* tabs are the same as those for the import dialog; however, the *Fields* tab determines how you match contacts in a .CSV file with contacts in the database. Additionally, when you delete contacts, you may delete/update other objects.

Delete dialog window

Name and Source Tab

Data Source

Data Source allows you to select from the following options.

Upload

This option allows you to upload a .TXT or .CSV file containing the records you wish to delete.

FTP or SFTP

This option allows you to select either **FTP** or **SFTP** and then enter the access URL.

Username

This is the username of the FTP or SFTP site.

Password

This is the password of the FTP or SFTP site.

List format

If you previously saved a list format, you may choose to delete your contacts in this format.

Format Options Tab

The *Format Options* tab allows you to customize the format of your delete records.

Delete Format Options tab

File Input Encoding

First line contains field names

When enabled, this checkbox will recognize the first line or row of your upload as the names of the contacts fields.

Input file encoding

This option allows you to select the encoding for your delete file; select the encoding type from the drop-down menu.

Field separator options

The field separator options are as follows: **Comma**, **Tab**, **Semicolon**, and **Custom**.

Fields Tab

The *Fields* tab determines how you match contacts marked for deletion in a .CSV file with contacts in the database. Additionally, when you delete contacts, you may delete/update other objects.

Delete Fields tab

Selected field

This is the field you have selected.

Mapped to

The *Mapped to* menu displays where the selected field is currently mapped to. To change where the field is mapped to, select a new field from the menu.

Results Tab

The *Results* tab displays the results from the attempted bulk delete as the following.

Delete Results tab

- **Records read** - The number of records read
- **Contacts deleted** - The number of contacts deleted
- **Errors detected** - The number of errors detected in the attempted delete

Note: If your delete attempt contains errors, you will be able to download a .CSV file listing the errors.

Log Tab

The *Log* tab displays the following data from bulk imports, exports, and deletes.

The Log tab displays records of imports, exports, and deletes

Date

Date is the date and time the transaction took place.

Who

Who shows the user who initiated the transaction.

Operation

Operation displays the type of transaction that occurred; the types are *Import*, *Export*, and *Delete*.

File

File displays the name of the *Import* or *Delete* file.

Rows

Rows displays the number of rows in the *File*.

Added

Added displays the number of new contacts added to the database.

Changed

Changed displays the number of contacts already in the database that were altered by the transaction.

Deleted

Deleted displays the number of contacts removed from the database.

Errors

Errors displays the number of records that were not added, changed, or deleted due to missing or incompatible information.

Notes

Notes is where you may enter notes about the transaction.

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: thesearch 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.

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 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/5c6dadc9d04fd75a777bdcfa/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*.

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***.

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*.

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*.

Cases tab

Cases

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.

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.

2021.10.05 AD Service.All.TeamAssignedService.jpg

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.

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

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

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 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.

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 case 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: *case: 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 line1 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@g**ma**il.com,” “**ma**sha@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"*

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** 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.

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

How to Create New Cases

Cases are automatically created from emails inbound to your contact center. But what do you do if you need to reach out to a contact and need a record of it, or want to create a case from another type of interaction?

New cases can be created from either existing cases or contacts saved in your contact center or during non-email interactions. For more information, see Additional Ways to Initiate Interactions.

During Interactions

New cases can be created during active voice or chat interactions by clicking the **Add new case** button. After clicking this button, a case tab will open a draft note; you may also send an email at this time. Additionally, you can apply various case states to the case.

How a created case looks from a chat

From Existing Cases

Personal Queue

New cases can be created from your Personal Queue by clicking the **Compose email** button. After clicking this button, a new draft email opens with the option to create a note. Note that creating an email this way will place you in a Busy state.

The compose email button located in Personal Queue

Team Queue and Pinned Cases

It is also possible to create new cases from the Team Queue and Pinned Cases sections; however, the contact information must already be saved in your contact center. To create a new case from these sections, hover your cursor over a contact; this will pop a contact card with clickable interaction icons. Clicking the **email** icon will create a new case in a draft email state wth the option to create a note. Note that creating an email this way will place you in a Busy state.

From Existing Contacts

From the Cases Tab

In section Search & Preview records, Cases tab, the **Add new case** button allows you to create a case for a saved contact. Note that this option is available for existing contacts only.

Create a new case from the Cases tab

Adding a new case in this way gives you several options:

- You may choose to create a note for the contact only.
- You can send the contact an email.
- You can create a note and send an email.
- You can apply various case states to the case.

Note that when a case is created in this way, you will be placed in a Busy state in preview mode.

When adding a new case, you can leave a note, send an email, and assign a case state

From a Contact's Saved Email Address

New cases can be created from email addresses saved to a contact's record. To create a new case, click the**email** icon that appears when you hover your cursor over the contact's email address; this will open a new draft email. You may also create a note for the case at this time.

Note that creating an email this way will place you in a Busy state. For more information, seeAdditional Ways to Initiate Interactions.

A new case can be initiated from a contact's email address

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/5c6dadc9d04fd75a777bdcfa/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/5c6dadc9d04fd75a777bdcfa)
- **<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/5c6dadc9d04fd75a777bdcfa)