

# 5.8 Custom Fields

## Bright Pattern Documentation

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1. REDIRECT [5.3:Contact-center-administrator-guide/CallCenterConfiguration/KnowledgeBase](#)

1. REDIRECT [5.3:Agent-guide/Work/Contacts/Details](#)

## Bright Pattern Search Object

The *Bright Pattern Search Object* block finds an existing object in the database. This block replaced the [Retrieve Internal Record](#) block starting from version 5.2.2 of Bright Pattern Contact Center software.

**Note:** For a list of standard fields returned by this block, see section [Standard Fields for CRM Objects](#).

### Settings

#### Title Text

*Title Text* is the name of the instance of the block. Enter a name in the text field and the new name of the block will appear in the flowchart.

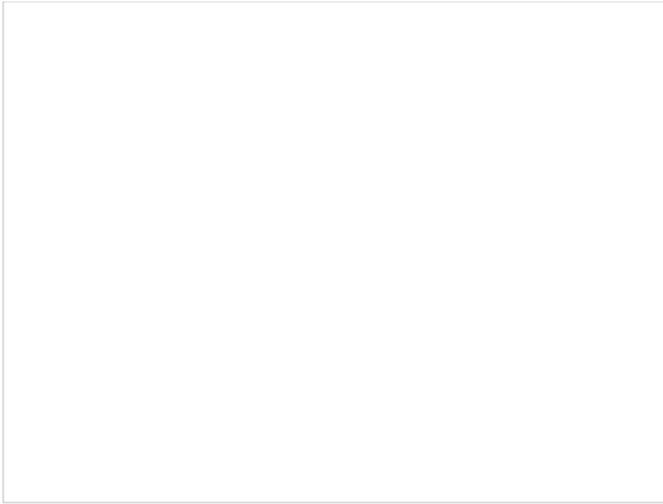
#### Object type

The *Object type* drop-down menu allows you to choose the type of object you want to search for in the internal database. You may choose **Case**, **Contact**, **Company**, or **Activity History**. Depending on what object type is selected, the settings change as follows:

#### Search

Multiple search conditions can be added. *Search* settings will vary depending on what object type you are searching for. The options are listed as follows:

#### Case



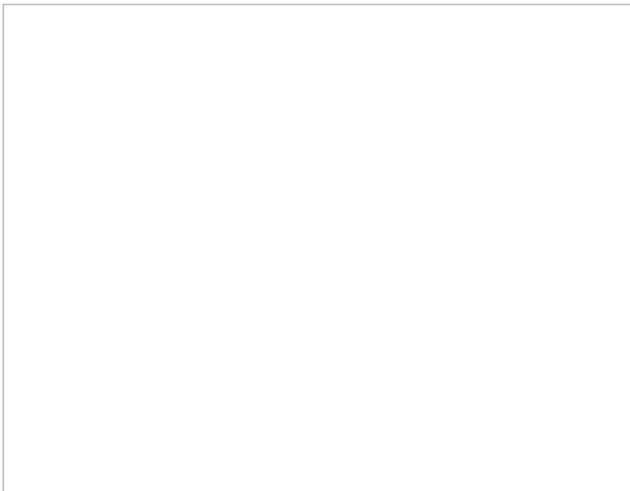
#### Bright Pattern Search Object case settings

To search by case, select either **ID**, **Number**, **Reporter ID**, **Status**, or a **custom case field** from the first drop-down menu. Note: Custom case fields will not appear in the *Search* menu unless the checkbox **Searchable in scenarios and workflows** has been selected. For more information, see [Custom Fields](#).

For any of these options, you may then select **Equal**, **Not equal**, **Empty**, or **Not empty** from the second drop-down menu. If you select **Equal** or **Not equal**, a field will appear and you will have the option to enter a text or variable item.

For the **State** option, you may select **Equal** or **Not equal** from the second drop-down menu, followed by the desired [case state](#).

#### Company



#### Bright Pattern Search Object company settings

To search by company, select **ID**, **Name**, **URL**, a **custom company field** from the first drop-down menu. Note: Custom company fields will not appear in the *Search* menu unless the checkbox **Searchable in scenarios and workflows** has been selected. For more information, see [Custom Fields](#).

For all these options, you may then select **Equal**, **Not equal**, **Empty**, or **Not empty** from the second drop-down menu. If you select **Equal** or **Not equal**, a field will appear and you will have the option to enter a text or variable item.

#### Contact

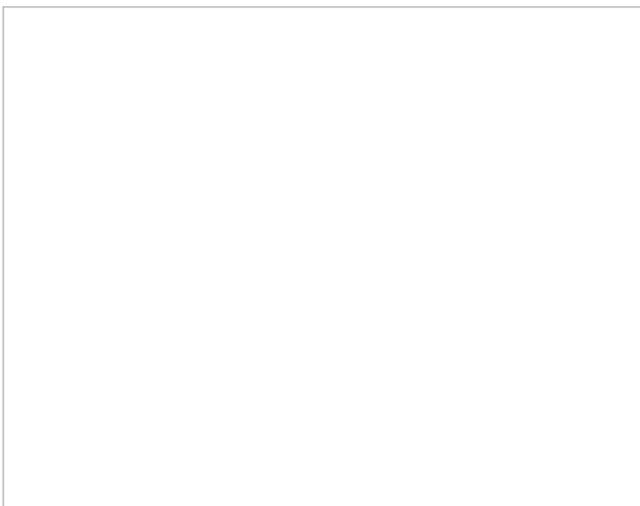


Bright Pattern Search Object contact settings

To search by contact, select **Email address**, **External ID**, **ID**, **Messenger ID**, **Phone**, or a **custom contact field** from the first drop-down menu. Note: Custom contact fields will not appear in the *Search* menu unless the checkbox **Searchable in scenarios and workflows** has been selected. For more information, see [Custom Fields](#).

For all these options, you may then select **Equal**, **Not equal**, **Empty**, or **Not empty** from the second drop-down menu. If you select **Equal** or **Not equal**, a field will appear and you will have the option to enter a text or variable item.

#### Activity history



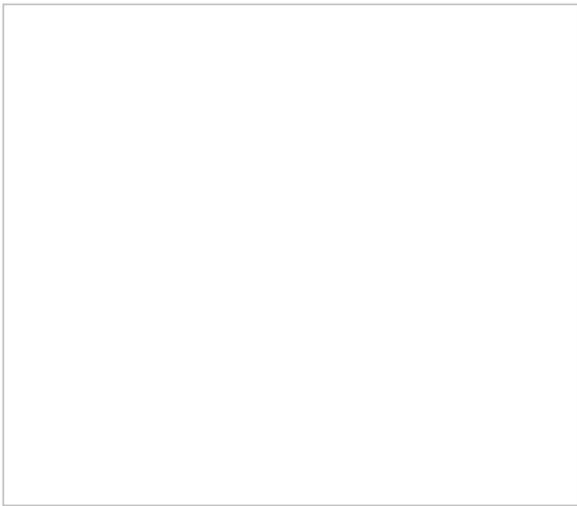
Bright Pattern Search Object activity history settings

To search by activity history, select **Case ID**, **Contact ID**, **Global Interaction ID**, **ID**, or a **custom activity history field** from the first drop-down menu. Note: Custom activity history fields will not appear in the *Search* menu unless the checkbox **Searchable in scenarios and workflows** has been selected. For more information, see [Custom Fields](#).

For all these options, you may then select **Equal**, **Not equal**, **Empty**, or **Not empty** from the second drop-down menu. If you select **Equal** or **Not equal**, a field will appear and you will have the option to enter a text or variable item.

Note that the activity history records are returned in the reverse chronological order (i.e., starting from the most recent one).

## Email



*Bright Pattern Search Object* email settings

To search by email, select **Email ID** from the first drop-down menu, **Equal** from the second drop-down menu, and then enter either an ID or a variable in the remaining field.

## Return fields

Select this option to add return field to your search. When you click the **add** option, you may enter a text or variable item in the field. Note you may add multiple return fields. For a list of available return fields, see section [Standard Fields for CRM Objects](#).

## Recordset name

*Recordset name* is the field that holds the results of the search the block executed; the text (i.e., value) entered in this field can then be used in a number of subsequent blocks to dictate further actions (e.g., passing the value to a [Bright Pattern Create Object](#) block if a contact's name is not found).

## Conditional Exits

## Failed

The *Failed* conditional exit is executed if the search operation failed, due to invalid parameters, timeout, or network connectivity to external CRM (e.g., Salesforce).

## No Data

The *No data* conditional exit is executed if no data matching the specified search criteria is found.

# Form Builder Overview

Bright Pattern Contact Center supports the creation of service-specific web forms that can be used to facilitate interaction handling. If a form is defined for a particular service, it will be displayed by the Agent Desktop application when a corresponding interaction is distributed to the agent. Activity forms can be pre-filled with data from third-party databases (via scenarios) and from calling lists.

Forms associated with outbound campaigns also can be used for new data entry during active interaction handling and/or after-call work (ACW). Filled-out forms can be transferred between agents working on the same interactions. The data collected via editable forms can be stored as part of the campaign results and is available for offline processing.

Note that editable forms are currently supported for services of Outbound Voice and Blended Voice types only. For all other types of services, static forms can be used (i.e., forms without any editable fields).

Forms are designed and edited in the application called Form Builder. This application is launched from the Contact Center Administrator application. For more information, see section [Activity Forms](#) of the *Bright Pattern Contact Center Administrator Guide*.

## User Interface

The Form Builder application provides a graphical user interface (GUI) that allows you to place various user interface (UI) elements to desired locations on a page and edit their properties, thus building your form. A form can incorporate various types of UI elements, such as static text, data fields, and pictures.

When creating or editing forms, Form Builder is shown in two different views: Dynamic Layout Editor and Static Layout Editor. The *Form Builder Reference Guide* describes both the Dynamic Layout Editor and Static Layout Editor views, as well as the forms and types of controls available for each.

## Dynamic Layout Editor

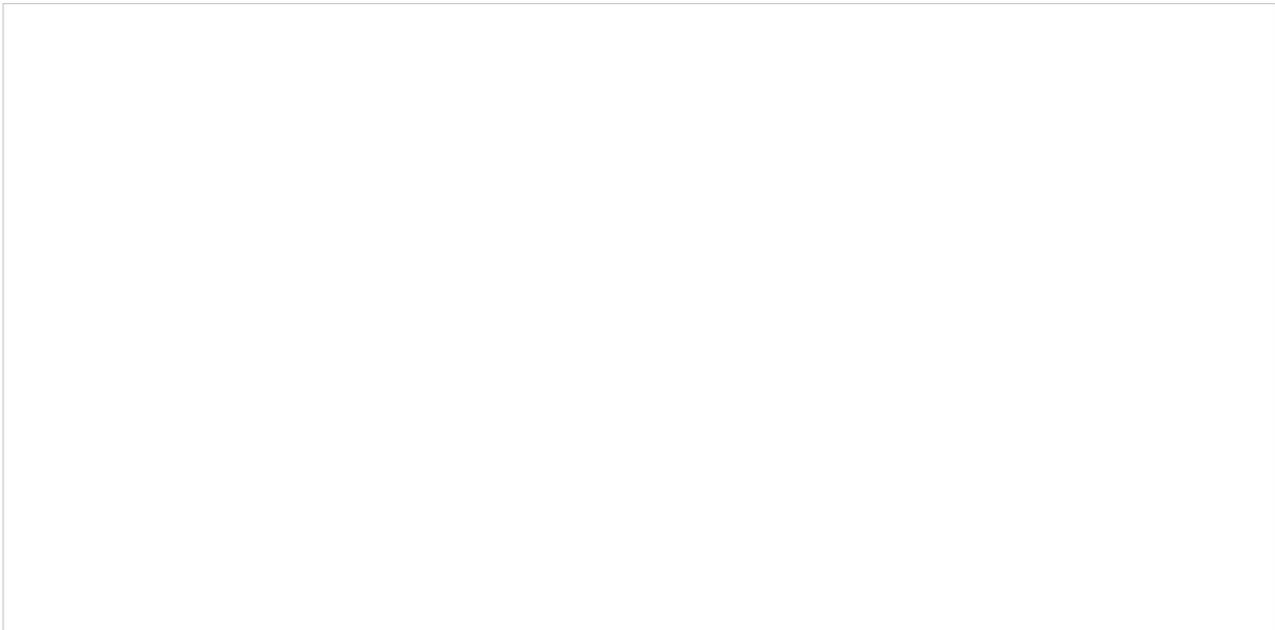
Bright Pattern Contact Center version 5.x brings a new GUI view called Dynamic Layout Editor to the Form Builder application. The Dynamic Layout Editor view enables the creation of new forms with flexible, dynamic layouts. In this view, columns, rows, and fields are easily resized and positioned on the form. Dynamic Layout Editor brings additional form controls, field properties, preview modes, and page thumbnails for multi-page forms. Note that Form Builder's Dynamic Layout Editor view is used to create new forms only.



Creating a new form

## Static Layout Editor

Imported forms that were created in Bright Pattern Contact Center version 3.x can be edited in Form Builder; however, such forms will be shown in the Form Builder version 3.x GUI known as Static Layout Editor view. In this view, the sizes of form elements must be specified in pixels, and the controls and other form elements remain in a fixed position on the form canvas. Note that Form Builder's Static Layout Editor view is used to edit existing version 3.x forms only.



Editing an existing form

The subsequent sections of this guide describe how to work with specific form controls within both Form Builder Views. The controls are listed in alphabetical order in the *All Form Controls* section of this guide.

# Bright Pattern Search Object

The *Bright Pattern Search Object* block finds an existing object in the database. This block replaced the [Retrieve Internal Record](#) block starting from version 5.2.2 of Bright Pattern Contact Center software.

**Note:** For a list of standard fields returned by this block, see section [Standard Fields for CRM Objects](#).

## Settings

### Title Text

*Title Text* is the name of the instance of the block. Enter a name in the text field and the new name of the block will appear in the flowchart.

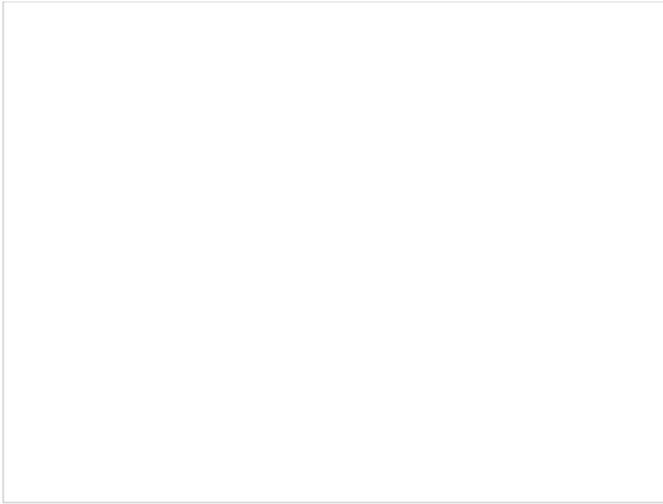
### Object type

The *Object type* drop-down menu allows you to choose the type of object you want to search for in the internal database. You may choose **Case**, **Contact**, **Company**, or **Activity History**. Depending on what object type is selected, the settings change as follows:

### Search

Multiple search conditions can be added. *Search* settings will vary depending on what object type you are searching for. The options are listed as follows:

### Case



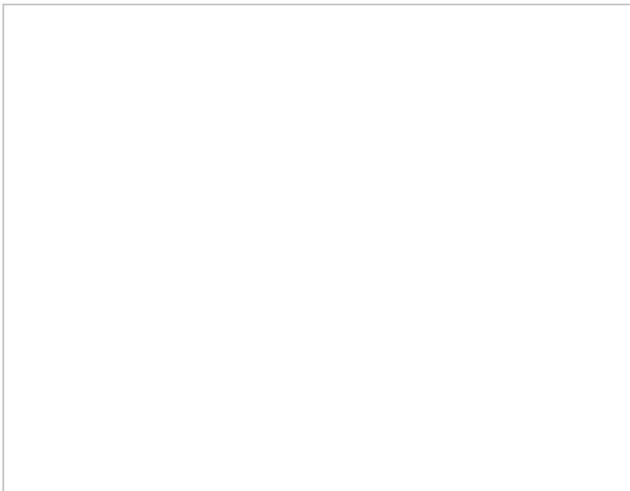
#### Bright Pattern Search Object case settings

To search by case, select either **ID**, **Number**, **Reporter ID**, **Status**, or a **custom case field** from the first drop-down menu. Note: Custom case fields will not appear in the *Search* menu unless the checkbox **Searchable in scenarios and workflows** has been selected. For more information, see [Custom Fields](#).

For any of these options, you may then select **Equal**, **Not equal**, **Empty**, or **Not empty** from the second drop-down menu. If you select **Equal** or **Not equal**, a field will appear and you will have the option to enter a text or variable item.

For the **State** option, you may select **Equal** or **Not equal** from the second drop-down menu, followed by the desired [case state](#).

#### Company



#### Bright Pattern Search Object company settings

To search by company, select **ID**, **Name**, **URL**, a **custom company field** from the first drop-down menu. Note: Custom company fields will not appear in the *Search* menu unless the checkbox **Searchable in scenarios and workflows** has been selected. For more information, see [Custom Fields](#).

For all these options, you may then select **Equal**, **Not equal**, **Empty**, or **Not empty** from the second drop-down menu. If you select **Equal** or **Not equal**, a field will appear and you will have the option to enter a text or variable item.

#### Contact

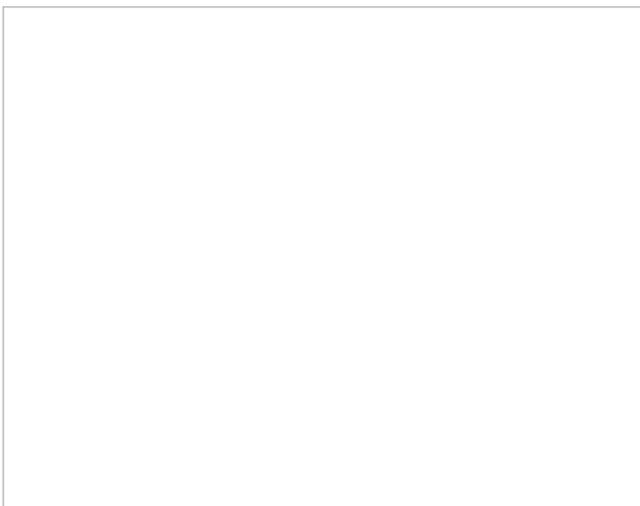


Bright Pattern Search Object contact settings

To search by contact, select **Email address**, **External ID**, **ID**, **Messenger ID**, **Phone**, or a **custom contact field** from the first drop-down menu. Note: Custom contact fields will not appear in the *Search* menu unless the checkbox **Searchable in scenarios and workflows** has been selected. For more information, see [Custom Fields](#).

For all these options, you may then select **Equal**, **Not equal**, **Empty**, or **Not empty** from the second drop-down menu. If you select **Equal** or **Not equal**, a field will appear and you will have the option to enter a text or variable item.

#### Activity history



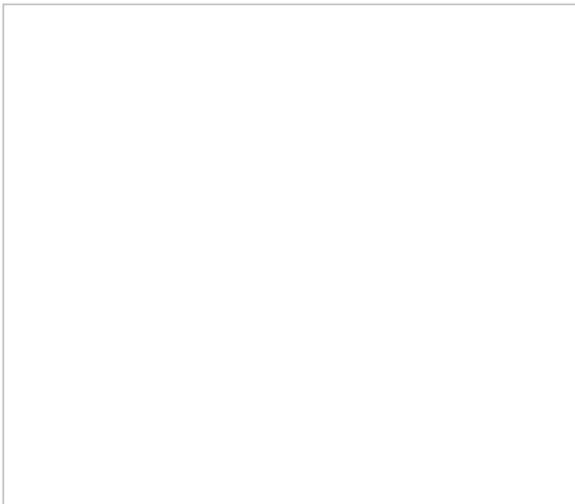
Bright Pattern Search Object activity history settings

To search by activity history, select **Case ID**, **Contact ID**, **Global Interaction ID**, **ID**, or a **custom activity history field** from the first drop-down menu. Note: Custom activity history fields will not appear in the *Search* menu unless the checkbox **Searchable in scenarios and workflows** has been selected. For more information, see [Custom Fields](#).

For all these options, you may then select **Equal**, **Not equal**, **Empty**, or **Not empty** from the second drop-down menu. If you select **Equal** or **Not equal**, a field will appear and you will have the option to enter a text or variable item.

Note that the activity history records are returned in the reverse chronological order (i.e., starting from the most recent one).

## Email



*Bright Pattern Search Object* email settings

To search by email, select **Email ID** from the first drop-down menu, **Equal** from the second drop-down menu, and then enter either an ID or a variable in the remaining field.

## Return fields

Select this option to add return field to your search. When you click the **add** option, you may enter a text or variable item in the field. Note you may add multiple return fields. For a list of available return fields, see section [Standard Fields for CRM Objects](#).

## Recordset name

*Recordset name* is the field that holds the results of the search the block executed; the text (i.e., value) entered in this field can then be used in a number of subsequent blocks to dictate further actions (e.g., passing the value to a [Bright Pattern Create Object](#) block if a contact's name is not found).

## Conditional Exits

## Failed

The *Failed* conditional exit is executed if the search operation failed, due to invalid parameters, timeout, or network connectivity to external CRM (e.g., Salesforce).

## No Data

The *No data* conditional exit is executed if no data matching the specified search criteria is found.

1. REDIRECT [5.3:Contact-center-administrator-guide/ScenarioEntries/ScenarioEntriesOverview](#)

# Bright Pattern Search Object

The *Bright Pattern Search Object* block finds an existing object in the database. This block replaced the [Retrieve Internal Record](#) block starting from version 5.2.2 of Bright Pattern Contact Center software.

**Note:** For a list of standard fields returned by this block, see section [Standard Fields for CRM Objects](#).

## Settings

### Title Text

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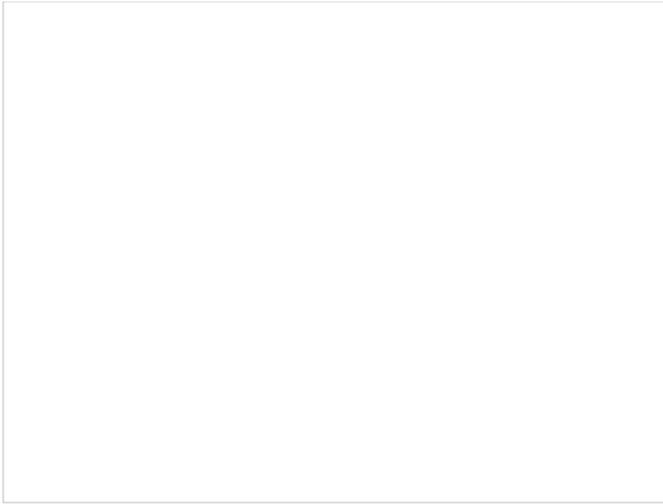
### Object type

The *Object type* drop-down menu allows you to choose the type of object you want to search for in the internal database. You may choose **Case**, **Contact**, **Company**, or **Activity History**. Depending on what object type is selected, the settings change as follows:

### Search

Multiple search conditions can be added. *Search* settings will vary depending on what object type you are searching for. The options are listed as follows:

#### Case



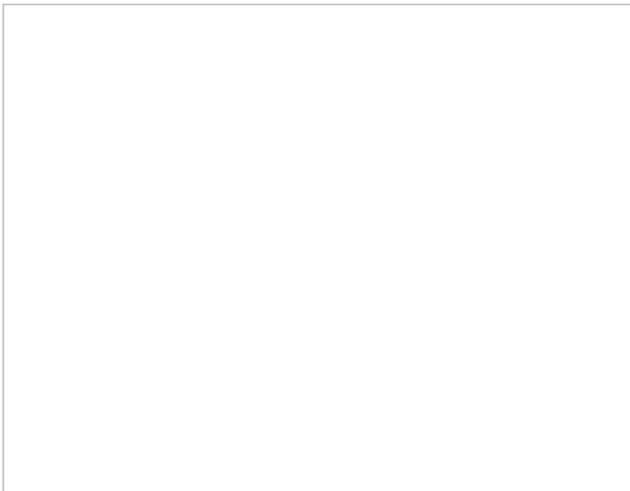
#### Bright Pattern Search Object case settings

To search by case, select either **ID**, **Number**, **Reporter ID**, **Status**, or a **custom case field** from the first drop-down menu. Note: Custom case fields will not appear in the *Search* menu unless the checkbox **Searchable in scenarios and workflows** has been selected. For more information, see [Custom Fields](#).

For any of these options, you may then select **Equal**, **Not equal**, **Empty**, or **Not empty** from the second drop-down menu. If you select **Equal** or **Not equal**, a field will appear and you will have the option to enter a text or variable item.

For the **State** option, you may select **Equal** or **Not equal** from the second drop-down menu, followed by the desired [case state](#).

#### Company



#### Bright Pattern Search Object company settings

To search by company, select **ID**, **Name**, **URL**, a **custom company field** from the first drop-down menu. Note: Custom company fields will not appear in the *Search* menu unless the checkbox **Searchable in scenarios and workflows** has been selected. For more information, see [Custom Fields](#).

For all these options, you may then select **Equal**, **Not equal**, **Empty**, or **Not empty** from the second drop-down menu. If you select **Equal** or **Not equal**, a field will appear and you will have the option to enter a text or variable item.

#### Contact

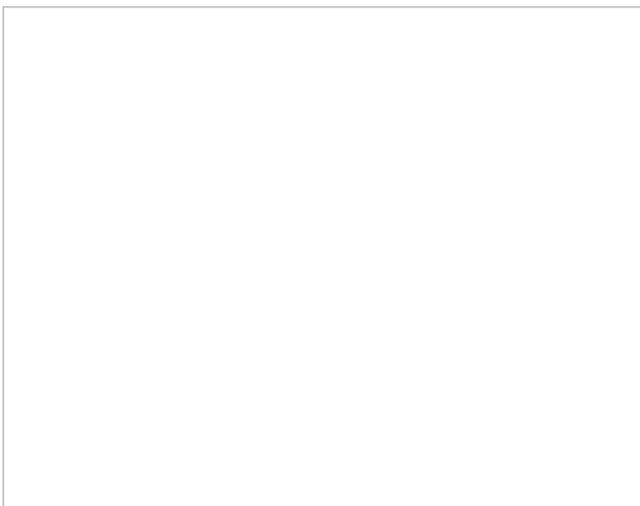


Bright Pattern Search Object contact settings

To search by contact, select **Email address**, **External ID**, **ID**, **Messenger ID**, **Phone**, or a **custom contact field** from the first drop-down menu. Note: Custom contact fields will not appear in the *Search* menu unless the checkbox **Searchable in scenarios and workflows** has been selected. For more information, see [Custom Fields](#).

For all these options, you may then select **Equal**, **Not equal**, **Empty**, or **Not empty** from the second drop-down menu. If you select **Equal** or **Not equal**, a field will appear and you will have the option to enter a text or variable item.

#### Activity history



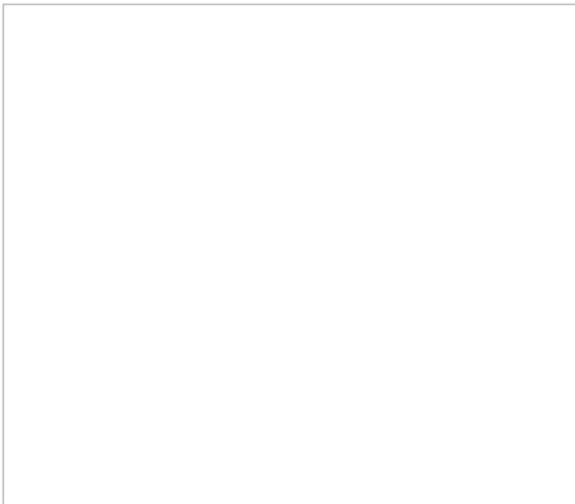
Bright Pattern Search Object activity history settings

To search by activity history, select **Case ID**, **Contact ID**, **Global Interaction ID**, **ID**, or a **custom activity history field** from the first drop-down menu. Note: Custom activity history fields will not appear in the *Search* menu unless the checkbox **Searchable in scenarios and workflows** has been selected. For more information, see [Custom Fields](#).

For all these options, you may then select **Equal**, **Not equal**, **Empty**, or **Not empty** from the second drop-down menu. If you select **Equal** or **Not equal**, a field will appear and you will have the option to enter a text or variable item.

Note that the activity history records are returned in the reverse chronological order (i.e., starting from the most recent one).

## Email



*Bright Pattern Search Object* email settings

To search by email, select **Email ID** from the first drop-down menu, **Equal** from the second drop-down menu, and then enter either an ID or a variable in the remaining field.

## Return fields

Select this option to add return field to your search. When you click the **add** option, you may enter a text or variable item in the field. Note you may add multiple return fields. For a list of available return fields, see section [Standard Fields for CRM Objects](#).

## Recordset name

*Recordset name* is the field that holds the results of the search the block executed; the text (i.e., value) entered in this field can then be used in a number of subsequent blocks to dictate further actions (e.g., passing the value to a [Bright Pattern Create Object](#) block if a contact's name is not found).

## Conditional Exits

## Failed

The *Failed* conditional exit is executed if the search operation failed, due to invalid parameters, timeout, or network connectivity to external CRM (e.g., Salesforce).

## No Data

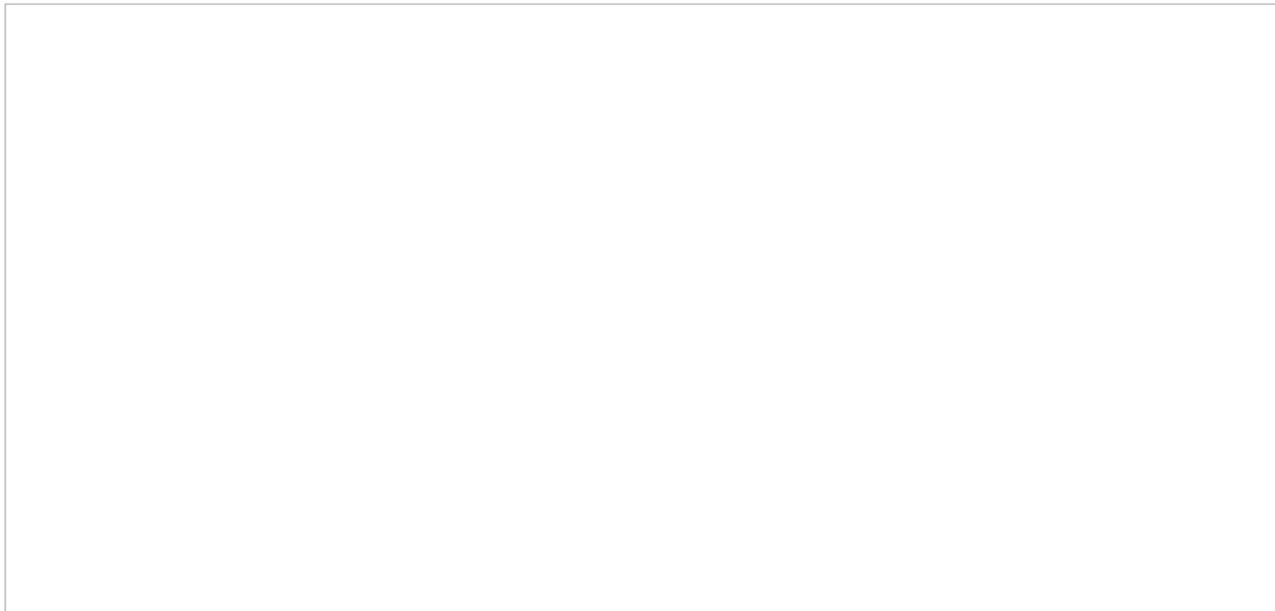
The *No data* conditional exit is executed if no data matching the specified search criteria is found.

1. REDIRECT [5.3:Agent-guide/Work/Contacts/Activities](#)

## Purpose

The Bright Pattern Contact Center *Form Builder Reference Guide* describes the building blocks of the Bright Pattern Contact Center web forms. This guide explains how to use these building forms to build custom forms for the Agent Desktop application.

Forms are configured in the Contact Center Administrator application, while the form fields are added and edited in the Form Builder application. For more information about form management, such as association of forms with outbound campaigns, see the *Contact Center Administrator Guide*, section [Forms](#).



Drag and drop fields to build custom forms with the Form Builder application

## Bright Pattern Search Object

The *Bright Pattern Search Object* block finds an existing object in the database. This block replaced the [Retrieve Internal Record](#) block starting from version 5.2.2 of Bright Pattern Contact Center software.

**Note:** For a list of standard fields returned by this block, see section [Standard Fields for CRM Objects](#).

## Settings

### Title Text

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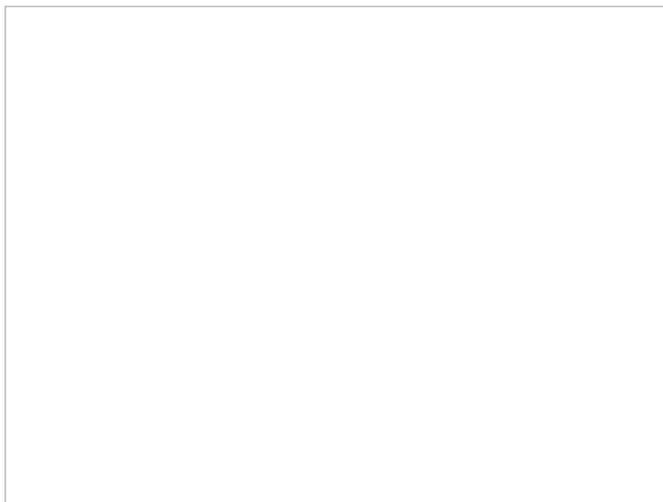
### Object type

The *Object type* drop-down menu allows you to choose the type of object you want to search for in the internal database. You may choose **Case**, **Contact**, **Company**, or **Activity History**. Depending on what object type is selected, the settings change as follows:

### Search

Multiple search conditions can be added. *Search* settings will vary depending on what object type you are searching for. The options are listed as follows:

#### Case



Bright Pattern Search Object case settings

To search by case, select either **ID**, **Number**, **Reporter ID**, **Status**, or a **custom case field** from the first drop-down menu. Note: Custom case fields will not appear in the *Search* menu unless the checkbox **Searchable in scenarios and workflows** has been selected. For more information, see [Custom Fields](#).

For any of these options, you may then select **Equal**, **Not equal**, **Empty**, or **Not empty** from the second drop-down menu. If you select **Equal** or **Not equal**, a field will appear and you will have the option to enter a text or variable item.

For the **State** option, you may select **Equal** or **Not equal** from the second drop-down menu, followed by the desired [case state](#).

#### Company

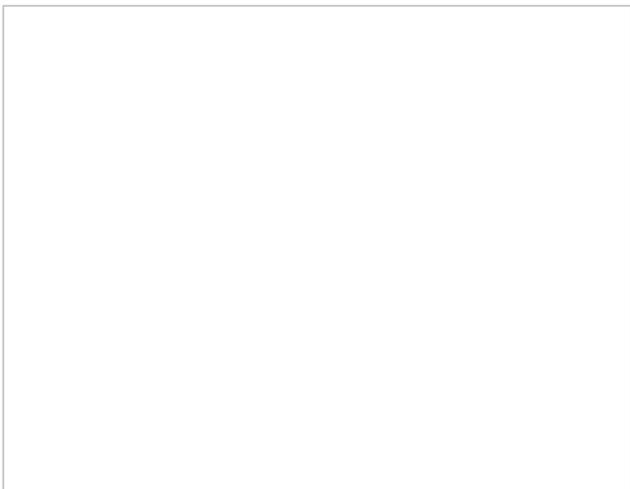


Bright Pattern Search Object company settings

To search by company, select **ID**, **Name**, **URL**, a **custom company field** from the first drop-down menu. Note: Custom company fields will not appear in the *Search* menu unless the checkbox **Searchable in scenarios and workflows** has been selected. For more information, see [Custom Fields](#).

For all these options, you may then select **Equal**, **Not equal**, **Empty**, or **Not empty** from the second drop-down menu. If you select **Equal** or **Not equal**, a field will appear and you will have the option to enter a text or variable item.

#### Contact

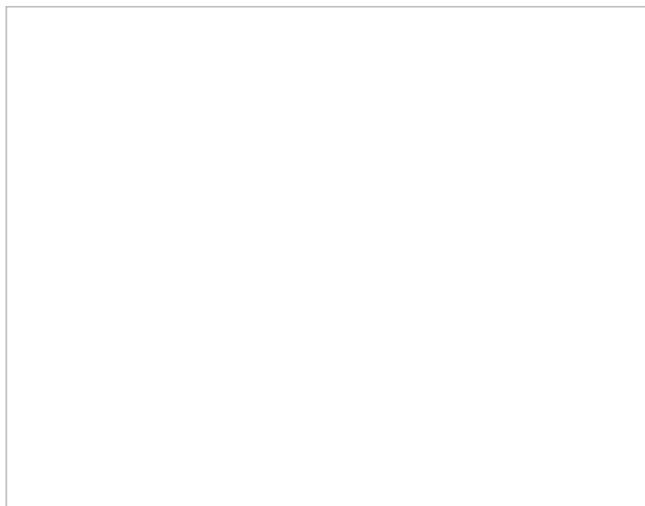


Bright Pattern Search Object contact settings

To search by contact, select **Email address**, **External ID**, **ID**, **Messenger ID**, **Phone**, or a **custom contact field** from the first drop-down menu. Note: Custom contact fields will not appear in the *Search* menu unless the checkbox **Searchable in scenarios and workflows** has been selected. For more information, see [Custom Fields](#).

For all these options, you may then select **Equal**, **Not equal**, **Empty**, or **Not empty** from the second drop-down menu. If you select **Equal** or **Not equal**, a field will appear and you will have the option to enter a text or variable item.

#### Activity history



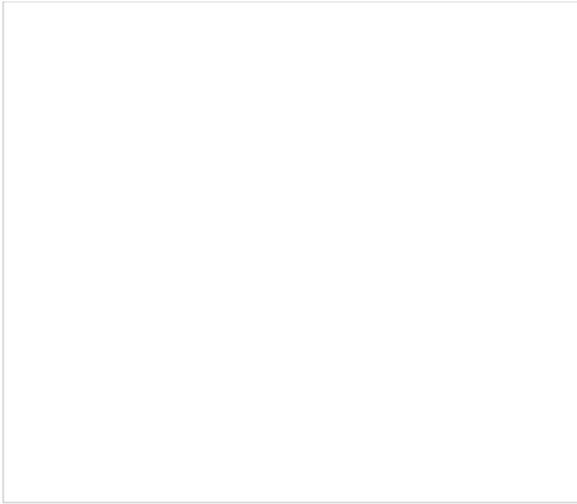
#### Bright Pattern Search Object activity history settings

To search by activity history, select **Case ID**, **Contact ID**, **Global Interaction ID**, **ID**, or a **custom activity history field** from the first drop-down menu. Note: Custom activity history fields will not appear in the *Search* menu unless the checkbox **Searchable in scenarios and workflows** has been selected. For more information, see [Custom Fields](#).

For all these options, you may then select **Equal**, **Not equal**, **Empty**, or **Not empty** from the second drop-down menu. If you select **Equal** or **Not equal**, a field will appear and you will have the option to enter a text or variable item.

Note that the activity history records are returned in the reverse chronological order (i.e., starting from the most recent one).

#### Email



*Bright Pattern Search Object* email settings

To search by email, select **Email ID** from the first drop-down menu, **Equal** from the second drop-down menu, and then enter either an ID or a variable in the remaining field.

### **Return fields**

Select this option to add return field to your search. When you click the **add** option, you may enter a text or variable item in the field. Note you may add multiple return fields. For a list of available return fields, see section [Standard Fields for CRM Objects](#).

### **Recordset name**

*Recordset name* is the field that holds the results of the search the block executed; the text (i.e., value) entered in this field can then be used in a number of subsequent blocks to dictate further actions (e.g., passing the value to a [Bright Pattern Create Object](#) block if a contact's name is not found).

## **Conditional Exits**

### **Failed**

The *Failed* conditional exit is executed if the search operation failed, due to invalid parameters, timeout, or network connectivity to external CRM (e.g., Salesforce).

### **No Data**

The *No data* conditional exit is executed if no data matching the specified search criteria is found.

1. REDIRECT [5.3:Contact-center-administrator-guide/CaseandContactManagement/Forms/ActivityForms](#)

