



5.8 Dispositions Tab

Bright Pattern Documentation

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Interaction Records Search

When you select the *Interaction Records* tab from the top of the screen, the application pane will initially display a search page where you define media type(s) of the interactions you are looking for as well as other search criteria, such as time frame, participating agent(s), and/or service(s) involved.

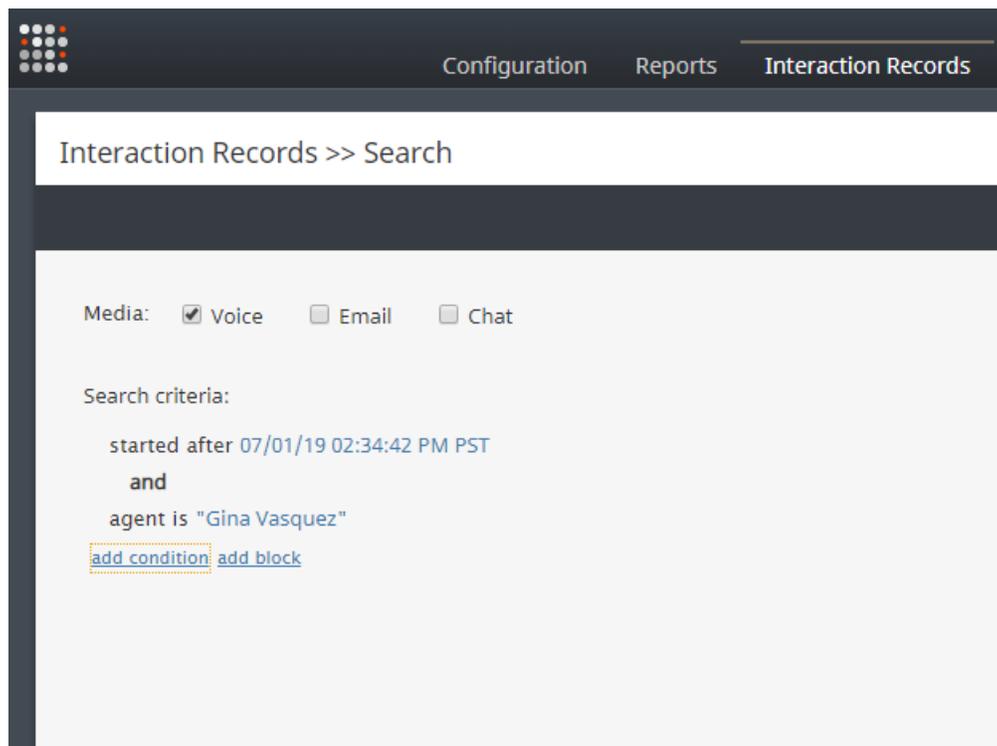
This section offers an overview of the Interaction Records Search feature. For detailed descriptions of search criteria and search results, see sections [List of Interaction Records Search Criteria](#) and [Search Results](#).

Notes:

- Only completed interaction segments appear in the Interaction Records search. For emails, this means that an email will only appear in search results after it has been replied to, closed without reply, or saved as a draft. Thus, emails in the initial distribution queue will not be shown.
- The standard aggregation period for the raw data used to produce detailed interaction records and historical reports is 15 minutes; therefore, under normal circumstances, detailed records for completed interactions and agent activities are available in Interaction Records and Agent Timeline within 15 minutes.
- In a worst-case scenario, the recordings for an interaction may be unavailable during two aggregation intervals (i.e., 30 minutes). Therefore, we recommend reviewing an interaction 30 minutes after it is completed.

Adding Search Conditions

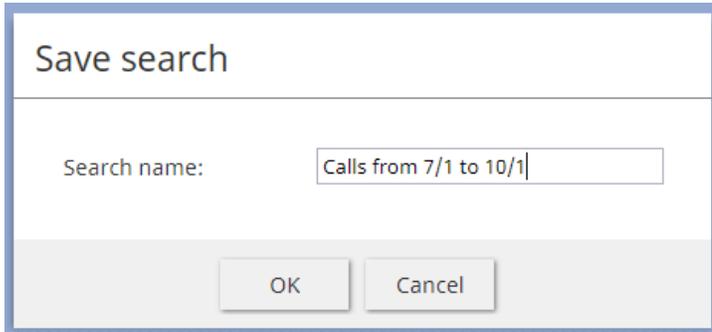
Your search criteria can have any number of [conditions](#) (i.e., search criteria). To add a condition to your search, click **add condition**. To edit or delete an existing condition, use the mouse-over operation.



Interaction records search

Saving Search Conditions

You can save a set of search conditions for future use--a helpful capability for when you regularly run the same searches and you do not want to add conditions manually each time you search. To save a set of search conditions, click **Save** and assign a name to it. To use a previously saved set of search conditions, click **Load**, and select its name from the drop-down menu.



Click "Save" to save your search conditions for future use

Viewing Search Results

When all desired search conditions are specified, click the **Search** button. The [Search Results](#) page will open with the list of interaction records matching your search criteria. Each row of the displayed table describes a single interaction.

Date and Time	From	To	Connect...	Durati...	Flag	Scenario	Service	Dispositi...	Notes	Account n...	Case ...	Agent	Recording	Senti...	Sentiment...	Segm...	Subject
07/22/20 04:33:17 P...	19294...	16504...		0:24		Support-Service	Customer Service									1	
07/22/20 04:35:42 P...	19294...	16504...		0:05		After Hours	Customer Service									1	
07/22/20 04:37:32 P...	1000	2044		0:04		default_bridge_scenario	Customer Service					admin				1	
07/23/20 05:11:23 P...	19294...	16504...		0:09		Support-Service	Customer Service						🔊			1	
07/23/20 05:14:06 P...	19294...	16504...	1000	0:54		Customer Service	Customer Service					admin	🔊			1	
07/23/20 05:16:19 P...	19294...	16504...	1000	0:24		Customer Service	Customer Service					admin	🔊			1	
08/01/20 10:03:36 A...	14699...	16504...		0:21		Customer Service	Customer Service						🔊			1	
09/04/20 02:16:06 P...	2044	1		0:06		default_bridge_scenario	Outbound Preview	Other co...				christy.borden	🔊			1	
09/08/20 11:33:31 A...	2044	19294...	1929459...	1:30		default_bridge_scenario	Outbound Preview	Dropped...				christy.borden	🔊			1	
09/08/20 01:33:21 P...	2044	19294...	1929459...	0:29		default_bridge_scenario	Outbound Preview	Wrong n...				christy.borden	🔊	🚫	0	1	
09/08/20 01:39:38 P...	2044	1		0:05		default_bridge_scenario	Outbound Preview	No answer				christy.borden	🔊			1	
09/11/20 01:53:44 P...	16503...	16504...		0:01		Last User Routino	Customer Service						🔊			1	
09/11/20 01:54:13 P...	16503...	16504...		0		Last User Routino	Customer Service						🔊			1	
09/11/20 01:55:25 P...	16503...	16504...	2064	0:09		Last User Routino	Customer Service	Product ...				elizabeth	🔊			1	
09/11/20 02:01:10 P...	16503...	16504...	2064	0:13		Last User Routino	Customer Service	Offer rej...				elizabeth	🔊			1	
09/11/20 02:01:45 P...	16503...	16504...	2064	0:08		Last User Routino	Customer Service					elizabeth	🔊			1	
09/11/20 02:02:03 P...	16503...	16504...	2064	0:10		Last User Routino	Customer Service	Product ...				elizabeth	🔊			1	
09/11/20 02:04:27 P...	16503...	16504...	1000	0:12		Last User Routino	Customer Service					admin	🔊			1	
09/11/20 02:04:49 P...	16503...	16504...	1000	0:10		Last User Routino	Customer Service	Silence				admin	🔊			1	
09/21/20 11:08:23 A...	2044	1000		0:04		default_bridge_scenario	Customer Service	Dropped...				christy.borden	🔊			1	
09/30/20 04:12:53 P...	19294...	16504...	2044	0:21		Last User Routino	Customer Service	Product ...				christy.borden	🔊	😊	0.704	1	

Search results

Note that an interaction may have multiple segments (e.g., when a call was handled by multiple agents). The number of segments in a call is shown in the *Segments* column. You can see details for each segment of a selected call by clicking that number.

Some columns show data that is media-type specific (e.g., *Case ID Subject* is only relevant for emails). You can adjust the format of your table to display only the columns for the data that you need. To remove columns, hover over any column header, open the drop-down menu, and unselect the columns for the data you do not need.

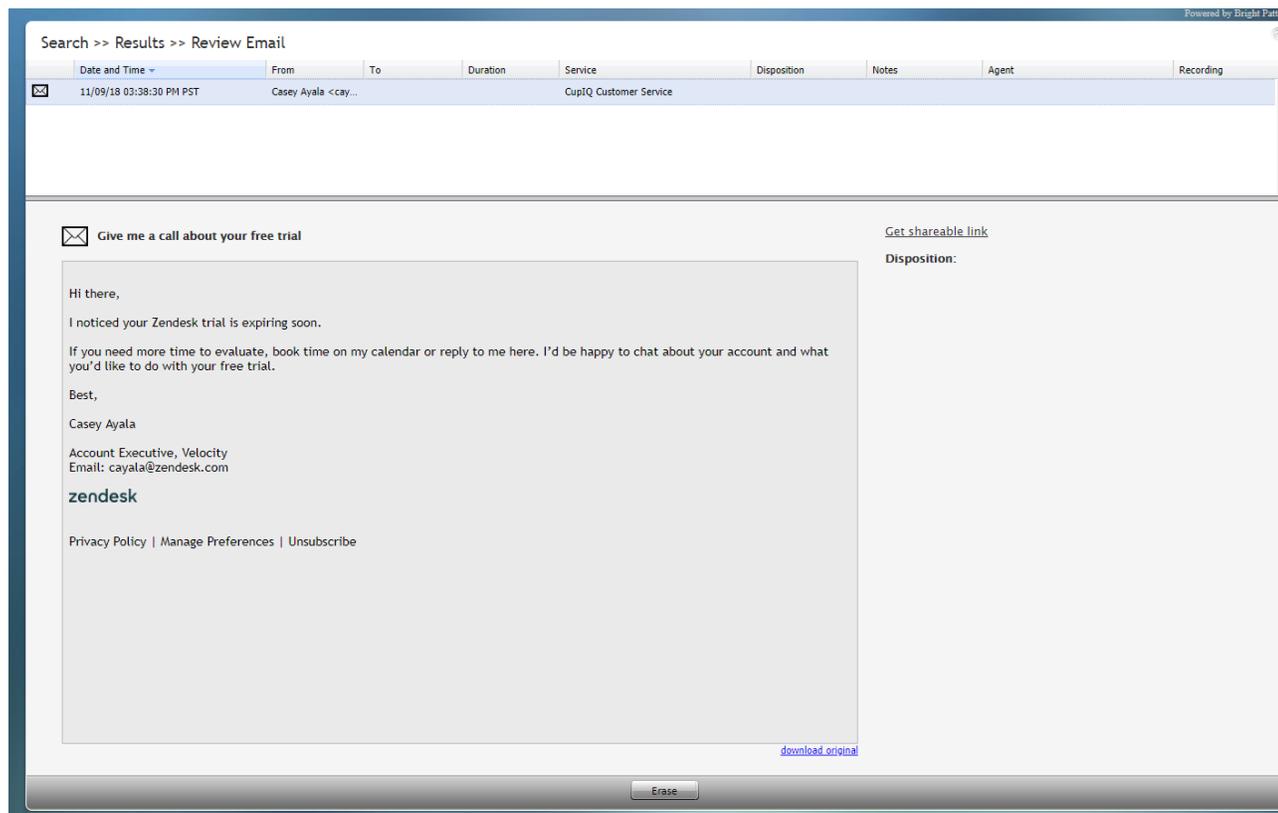
You can download all records that appear in the Search Results page in the .CSV format. To export the records, click the **export** button at the bottom of the page.

You can also manually download email content, call recordings, and call progress analysis (CPA) recordings for the interactions shown in the *Search Results* page. Note that manual download is limited to up to 100 emails, 100 call recordings, and 500 CPA recordings, respectively.

Periodic automated export of call/CPA recordings is configured via [Services and Campaigns > Results Tab](#) of the Contact Center Administrator application.

Erasing Interaction Content

The *Erase* feature for an interaction record allows you to remove the content of the record (i.e., voice recording and/or transcript for a call, the transcript for a chat, message body for an email, etc.), which may be necessary in order to comply with privacy laws or security standards. When taking this action, note that you can delete the content of one interaction at a time. For bulk erasure of interaction content, see the *Contact Center Administrator Guide*, section [Results Tab > Interactions Erasing](#).

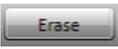


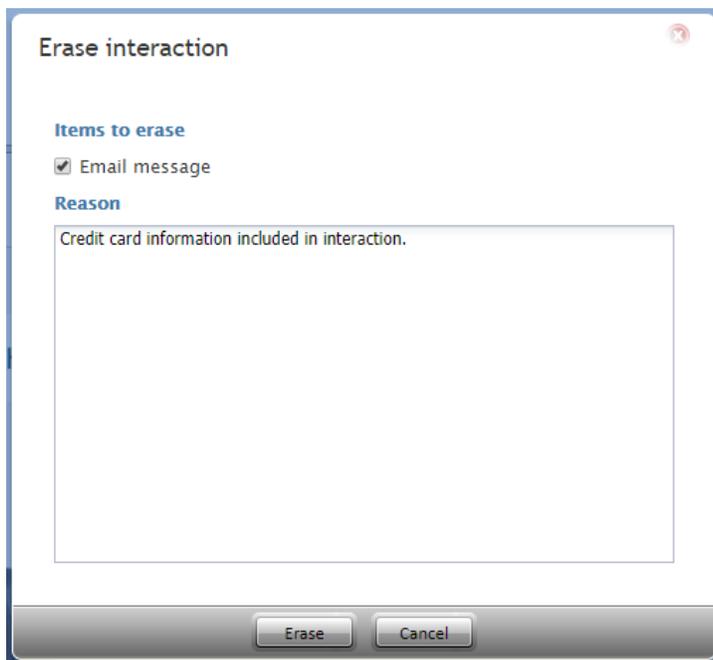
The screenshot displays a web interface for reviewing an email interaction. At the top, a navigation bar shows 'Search >> Results >> Review Email'. Below this is a table with columns: Date and Time, From, To, Duration, Service, Disposition, Notes, Agent, and Recording. The table contains one row with the following data: Date and Time: 11/09/18 03:38:30 PM PST; From: Casey Ayala <cay...>; To: (empty); Duration: (empty); Service: CupiQ Customer Service; Disposition: (empty); Notes: (empty); Agent: (empty); Recording: (empty). Below the table, the email content is displayed. The subject is 'Give me a call about your free trial'. The body text reads: 'Hi there, I noticed your Zendesk trial is expiring soon. If you need more time to evaluate, book time on my calendar or reply to me here. I'd be happy to chat about your account and what you'd like to do with your free trial. Best, Casey Ayala, Account Executive, Velocity, Email: cayala@zendesk.com'. The Zendesk logo and footer links (Privacy Policy, Manage Preferences, Unsubscribe) are also visible. On the right side, there is a 'Get shareable link' button and a 'Disposition:' label. At the bottom of the email content area, there is a 'download original' link. At the very bottom of the interface, there is an 'Erase' button.

An interaction record with the option to erase it

How to Erase Interaction Content

To erase content of a single interaction, take the following steps:

1. Configure the desired criteria for your records search and find the desired interaction record.
2. Open the record for review by clicking it's content item.
3. At the bottom of the record, select the **Erase**  button; this will pop the *Erase interaction* window



Erase interaction

Items to erase

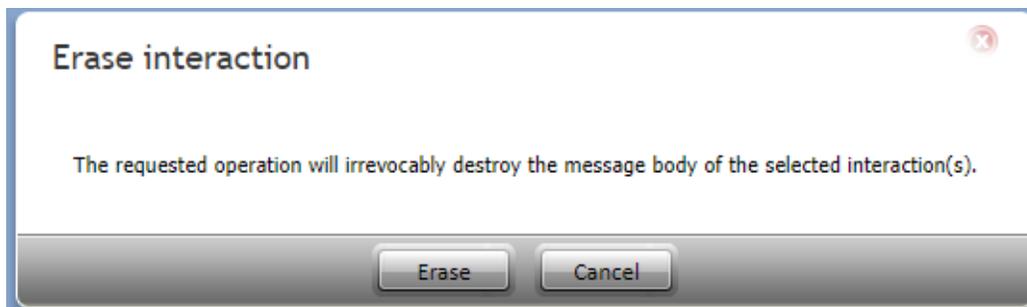
Email message

Reason

Credit card information included in interaction.

Erase Cancel

4. Select **Items to erase**, which displays the type of content you wish to erase (e.g., a voice recording, a transcript, or both)
5. Fill in the mandatory **Reason** field; this allows you to provide a reason the content was erased.
6. Select the **Erase** button and you will see a new prompt, warning you that erasing the interaction is permanent.



Erase interaction

The requested operation will irrevocably destroy the message body of the selected interaction(s).

Erase Cancel

7. Select the **Erase** button again and the interaction will be permanently erased. Note that for email interactions, the *Erase* function erases content of one email message at a time. For other media types (voice, chat), the content of the entire interaction will be erased at once, regardless of the number of interaction segments.

Note that in the interaction window, if you select the segment that was erased, a message will display the time, date, user, and reason the interaction was erased.

