



5.8 Customizing Activity History Forms to Show Notes

Bright Pattern Documentation

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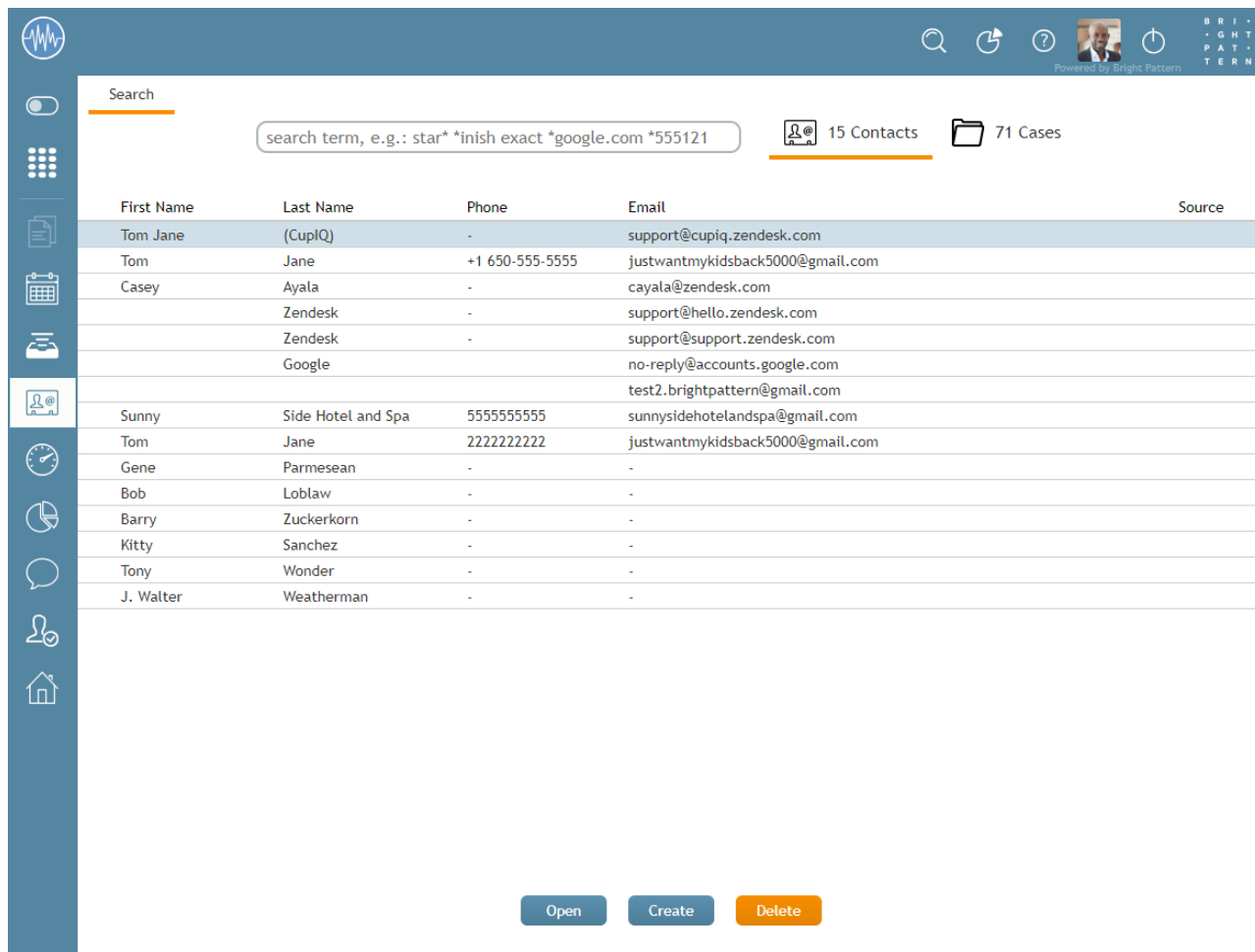
Search & Preview Records Interface

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	Zuckerhorn	-	-	
Kitty	Sanchez	-	-	
Tony	Wonder	-	-	
J. Walter	Weatherman	-	-	

Search & Preview Records main screen

Search Bar

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

Search



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

Search bar

Contacts

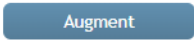
The *Contacts* section is where *contact records* are located. *Contact* records are the entries in your contact center's database containing customer information. When you open a contact record, you can view the contact's interaction history with your contact center as well as any saved personal data.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

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

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

Details Tab

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

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

The screenshot shows a CRM interface with a dark blue header and a vertical sidebar on the left. The header contains a search bar with 'Tom Jane' and a 'x' icon, a profile picture, and the text 'Powered by Insight Pattern'. The sidebar has icons for home, contact, calendar, and other functions. The main content area shows contact details for 'Tom Jane' with a 'TJ' avatar. The details 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

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

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

Details Activities Pending **Cases**

Spam

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

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

Product
General Email

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

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

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

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

Open

Cases tab

Cases

Search

search term, e.g.: star*inish exact "google.com"5551212

46 Contacts 15 Cases

Spam

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

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

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

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

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

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

Email Service #1

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

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


NOTES

View Open


All cases

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


Spam button


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

Trash button

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


Link button

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

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

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

Create a follow-up case button

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

Static Elements

Shown

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

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

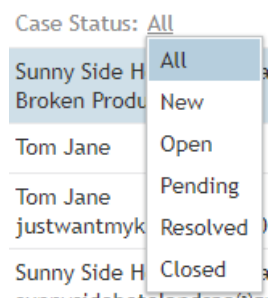
Shown cases

Case Filters

The following filters are available for cases.

Case State

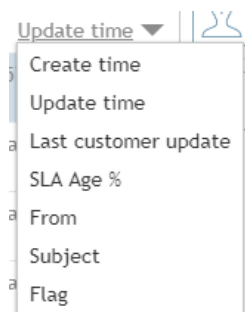
The *Case State* filter allows you to sort cases per assigned State. For more information, see [For more information, see *Case State*.](#)



Case State filter

Case details

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



Services

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

The screenshot shows a search interface with a search bar containing the text "search term, e.g.: star* *finish exact *google.com *5551212". To the right of the search bar, there are icons for "9 Contacts" and "81 Cases". Below the search bar, there 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 case details include a message from "Unidentified, reporter" and a list of events, such as "Christy Borden changed case state to Resolved on Mar 18, 2021 at 5:43 PM" and "Christy Borden dispositioned email interaction Mar 18, 2021 at 5:43 PM".

Teams

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

Case Properties

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

The configurable properties are as follows.

All

Displays all configurable content properties, specifically:

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

Contact

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

Location

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



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

Case location

State

Displays the current [case state](#).

Date

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

SLA

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

Last Service

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

Disposition

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

Restore Default

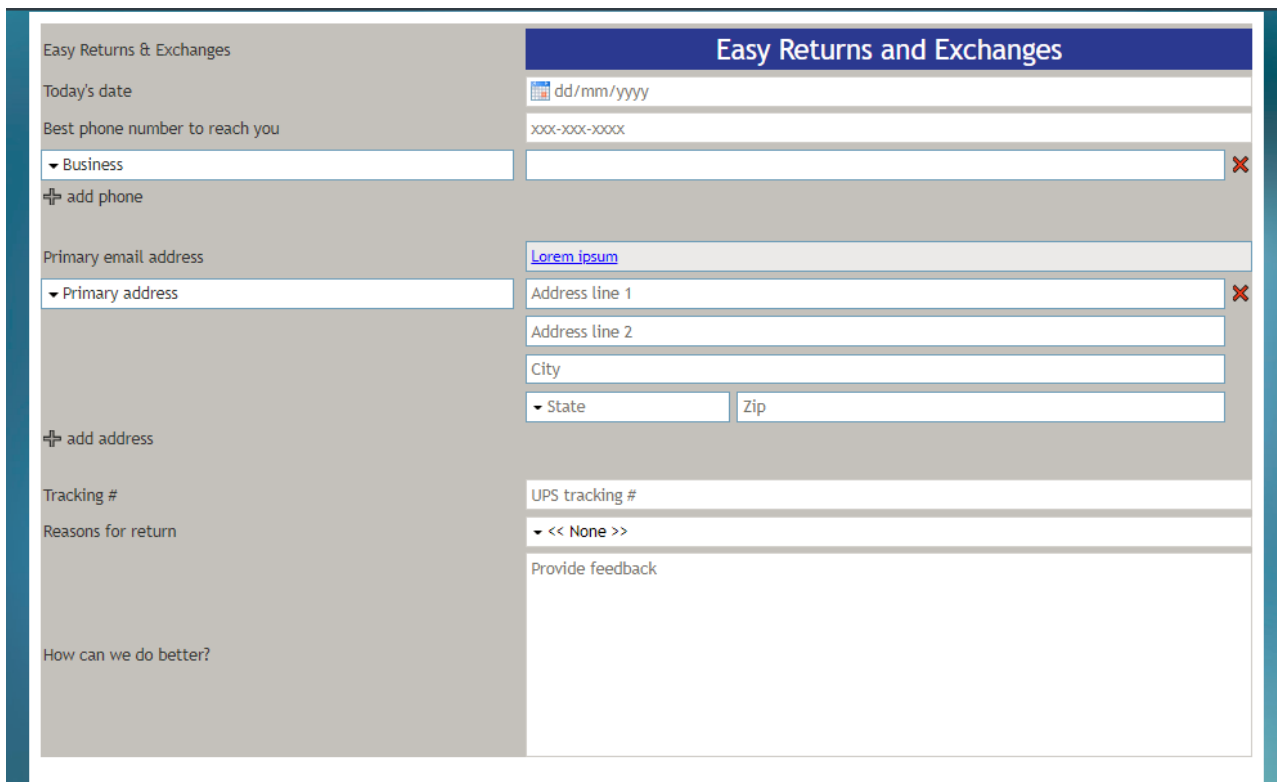
When selected, the displayed configurable properties will be restored to the system default; the default properties are as follows:

- Location
- State
- Date
- SLA

Text

The *Text* control places some amount of text on a form. For example, this text could be a form title, URL, policy information, shipping guidelines, text from Knowledge Base articles, or anything that your contact center requires or desires to be on a form.

In Preview mode, the Text control appears as shown. In this example, the Text control is styled as a title ("Easy Returns and Exchanges"), in a larger font size and with a contrasting background color.



The screenshot displays a form titled "Easy Returns & Exchanges" with a dark blue header. The form is divided into two main sections. The left section contains labels for "Today's date", "Best phone number to reach you", "Primary email address", "Tracking #", "Reasons for return", and "How can we do better?". The right section contains input fields for "dd/mm/yyyy", "xxx-xxx-xxxx", "Business", "Primary address", "Address line 1", "Address line 2", "City", "State", "Zip", "UPS tracking #", and "Provide feedback". A text control is present in the right section, displaying "Lorem ipsum" in a blue font. The text control is styled as a title, with a larger font size and a contrasting background color.

Text on a form

Field Properties

Once you have placed the control onto your form canvas, you can edit the field properties by clicking the pencil icon on the component. The field properties are described as follows.

Text Field Properties

Dock to main window

Edit Mode Style: None Add / Edit

Label: Easy Returns & Exchanges

Hint text for empty field:

Data field: \$()

Options

Editable:

Required:

Hide if read-only and empty:

Multiline:

Destination for KB article content:

Initial number of lines: 1

Initial value:

Custom reporting field: None

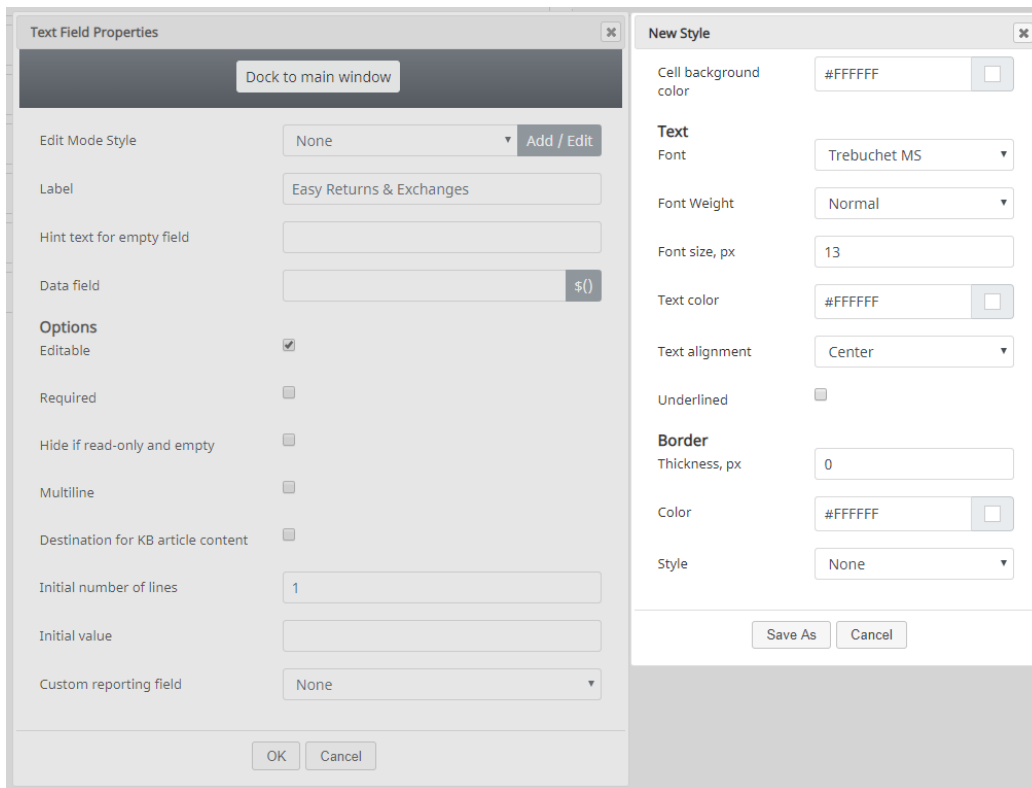
OK Cancel

Text properties

Edit Mode Style

Edit Mode Style is the common property that allows you to select, edit, or add a [style](#) for this form control. For example, you may select "Text" from the selector, and click **Add / Edit** to change the style (e.g., text, font, color, etc.) of the field displayed on the form.

In the example shown, the Text control is styled as a title, in a larger font size and with a contrasting background color.



Add / Edit style

Label

Label is the name of this control that will be displayed on the form (e.g., "Easy Returns & Exchanges").

Hint text for empty field

This text input field is where you enter any text that you wish to display in this control's empty fields. The hint text indicates to the user what kind of text belongs in this field (e.g., "form title").

Data field

The *data field* is where you enter a specific variable or select a variable to get and insert data into the form. For example, if a [Knowledge Base](#) article is used in an [activity form](#), the blank, Knowledge Base-associated fields can be configured to prefill with values from [activity history custom form fields](#). If an activity history field variable is not present in an activity form, it is not prefilled. Additionally, if a value is not set for the Knowledge Base article, the field does not prefill the form. If an agent has put some value in a field already, it is not prefilled (it will only prefill when empty).

Options

Editable

Select this checkbox to allow users to edit the Text field. This box is checked by default.

Required

Select this checkbox to require users to enter text. Note that *Required* is enabled only if the field is editable.

Hide if read-only and empty

Select this checkbox to hide the Text field if it's empty or marked as read-only.

Multiline

Select this checkbox to indicate that the Text control will contain multiple lines of text.

Destination for KB article content

Select this checkbox to indicate that Knowledge Base content will be placed inside this Text field.

Initial number of lines

Specify how many lines of text should be available. The default value is 1; a valid range is 1 to 99.

Initial value

You can indicate the initial value to be shown on the Text control. This is optional.

Custom reporting field

The *Custom reporting field* is the [custom reporting field](#) created for your contact center (if any). Such a field is unique to your contact center, as it is different from any default fields. If you do not have any custom reporting fields, select **None** from the drop-down list.

Working with Controls

Form controls are the building blocks of your form. You can easily drag them on and off the form canvas. This section describes how to add, edit, and remove form controls in Form Builder's Static Layout Editor.

For more information about form controls and their properties, see the next section of this guide, *Dynamic Layout Editor Controls*, which includes all the form controls available in the Dynamic Layout Editor view. Note that these controls are not available in the Static Layout Editor view.

How to Add Controls

Controls are dragged and dropped onto and off of the form canvas. After a control has been placed on the form canvas, you can drag it to a different location on the form. Once a control has been placed, mousing over it will display a pencil icon for editing the control's properties.

How to Edit Controls

Once a control has been placed on the form canvas, mousing over it will display a pencil icon for editing the control's properties. Click the pencil icon to edit the control's field properties.

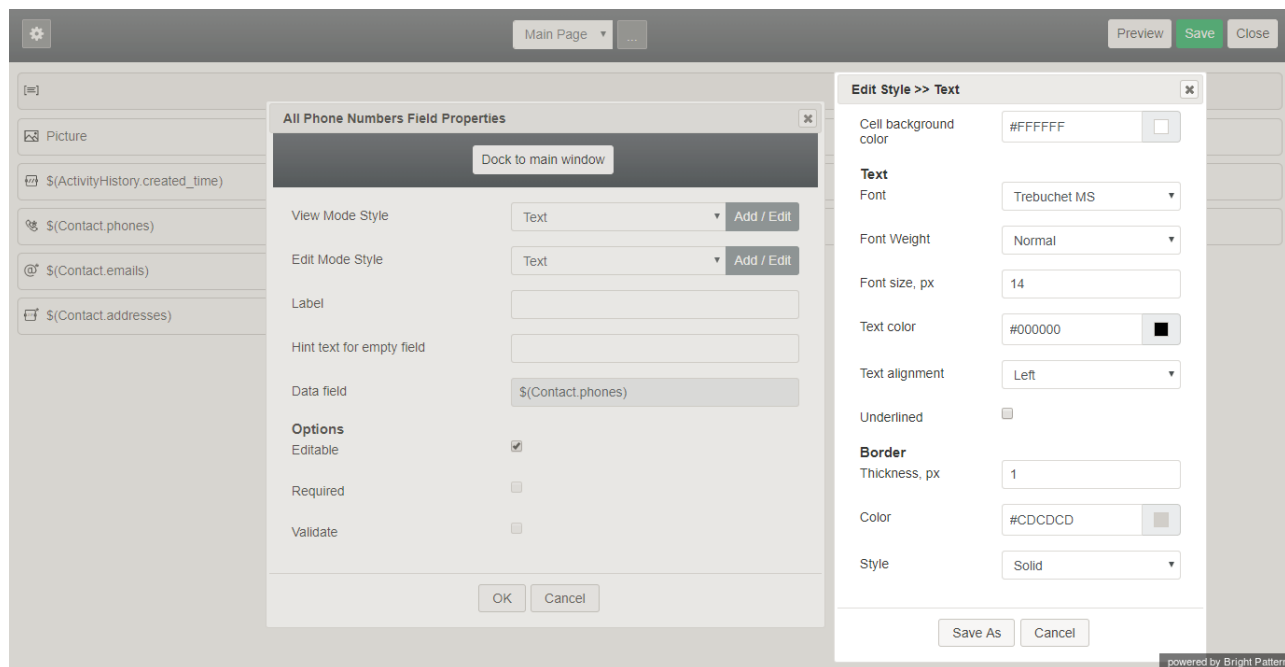
The properties will open in a pop-up dialog. If you do not wish to edit properties in the pop-up dialog, you can opt to dock the properties to the form canvas by clicking the *Dock to main window* button.

How to Remove Controls

Mousing over a control on the form canvas will display a trash icon to delete the control. Click the trash icon to remove the control from the form.

Style

Note that all controls that may have text in them have a common property called *Style*. Styles control the appearance of the static text on your form, such as font type, font size, text color, and alignment.



Editing form field styles

Bright Pattern Contact Center software provides a number of predefined styles that you can select from the drop-down menu. You can edit any of such predefined styles, or you can create your own styles from scratch:

1. Select the style that you wish to edit from the drop-down menu (to create a style from scratch, select **None**).
2. Click **Add / Edit**.
3. Specify style properties.

Data Fields

The values of many form components can be defined in data fields as [scenario variables](#) in the $$(varname)$ format.

Data field	<input type="text" value="\$({Contact.addresses})"/>
Options	
Editable	<input checked="" type="checkbox"/>
Required	<input type="checkbox"/>
Validate	<input type="checkbox"/>

OK Cancel

powered by Bright Pattern

Example of a variable in a data field