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Bright Pattern Documentation

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How to Search Email Cases

As you work with more customers and fulfill more customer requests, you will accumulate a growing collection of cases. From your Agent Desktop, you can search through your cases easily using a string search in any language.

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



Search strings are typed into the text input field

Search String

To search your email cases in Agent Desktop, navigate to the *Contacts* center, select the *Cases* tab, and type in any character(s) (i.e., letters and/or numbers) into the **search term** field. In addition, you can enter email addresses, names, date of birth, case numbers, contacts, and email subject strings.

In the search results, the first 200 cases/contacts are displayed, with the newest entries displayed first.

Case Number

When a new email request arrives, the system creates a case for it automatically and assigns a number to this case that is unique within your contact center (e.g., 1185). This number is typically communicated to the customer and can be used by both the customer and yourself to refer to the given request in all future communications. If you know the case number, you can enter it in the search string input field.



You may search by case number

Email

If you are familiar with a case or customer's email address, you may search for it. In the example shown, entering the complete email address in the search string input field returns all matches in the system. Entering the search tag **email: XXX** will search email fields specifically. Note: XXX represents an email address.

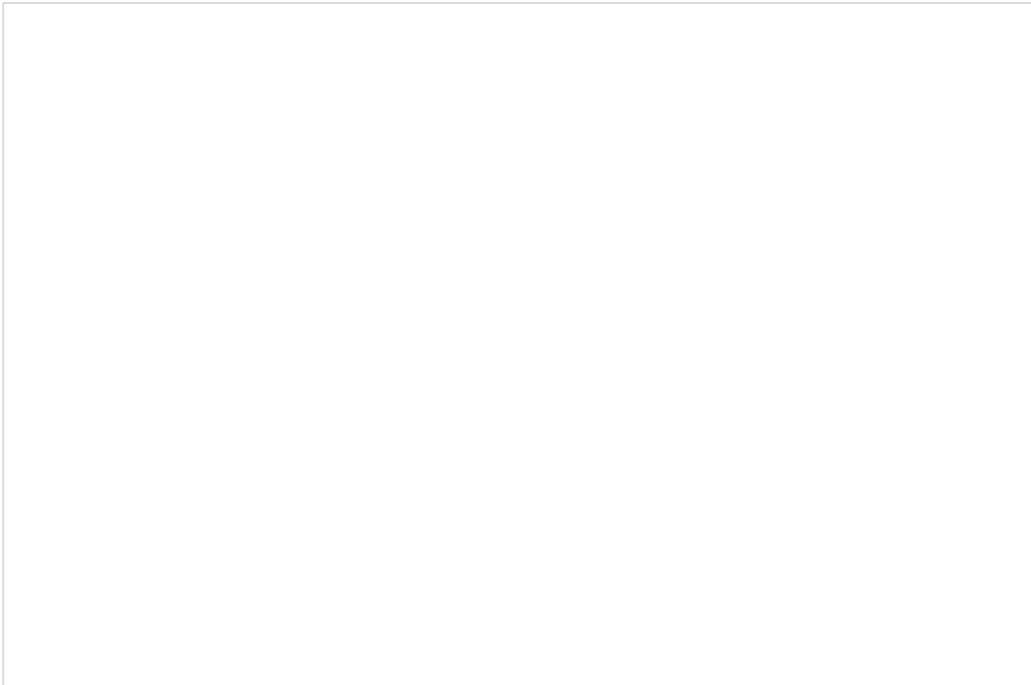
You may search for any part of an email address by using the **email:** filter, followed by the desired part of the email address. For example, a search for "email:ma" could return results such as "example@gmail.com," "masha@example.com," and so forth. Additionally, including the "@" symbol in a search is another way to find email addresses.



You may search by email address

Name

In the example shown, entering a partial or full name in the search string input field returns several results with name data.



Search by first name, last name, or full name

Subject

Email subject lines may be searched for either whole or in part; the search recognizes individual words.

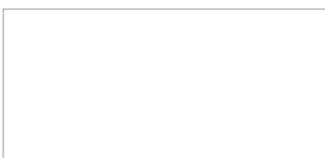


You may search by email subject

For more information about email cases, see section [Understanding Email Cases and Threads](#).

Global Interaction Identifier

Global interaction identifier (GIID) is a [UUID-formatted](#) number assigned to every interaction processed within Bright Pattern Contact Center. It can be used to track interaction history through all stages of processing within the system, including possible consultations, transfers, conferences, service changes, and media upgrades. At runtime, GIID can be exported to third-party applications via scenarios and/or desktop integration APIs. Historically, GIID appears in all records related to interaction processing, including call detail records, outbound campaign results, voice recording file names, and activity history of pre-integrated CRM applications. GIID is available as a search condition (i.e., data element) in the [interaction records search](#).



Examples of global
interaction IDs in
interactions records

Rules When Assigning a GIID

Depending on whether an interaction is new or related to another existing interaction, GIID is either generated or inherited. More specifically, the following general rules apply when assigning a GIID:

- For inbound voice and chat interactions, GIID is generated as soon as the interaction enters the contact center.
- For predictive, progressive, and automatic (IVR) campaign calls, a new GIID is generated for every new call attempt (i.e., different call attempts related to the same calling record have different GIIDs).
- For preview campaigns, a new GIID is generated each time a preview record is distributed to an agent. When the agent makes a call based on a preview record, the call attempt inherits the GIID of the record. If an agent makes several call attempts while handling one preview record, all such call attempts will have the same GIID.
- Manual consultation calls, both outbound and internal, inherit GIID of the held primary call. If several calls are on hold, the consult call inherits GIID of the call that has been placed on hold most recently.
- For manual outbound and internal calls unrelated to any existing calls, GIID is generated as soon as the call is dialed.
- For new inbound email interactions, GIID is generated when the email enters the contact center.
- For new outbound email interactions (emails unrelated to any existing cases), GIID is generated as soon as a draft is created (agent clicks the *Compose* button).
- For follow-up emails initiated by customers, GIID is generated when the email enters the contact center.
- Follow-up emails initiated by agents inherit GIID of the previous email in the email thread.
- A call originated in the context of a customer chat interaction inherits GIID of the chat interaction.
- A call originated in the context of an email interaction inherits GIID of the email interaction.
- A new email originated in the context of a voice call inherits GIID of the call.
- Transferred/forwarded interactions inherit GIID assigned to the original interaction in a transfer sequence.
- Conference portions of interactions inherit GIID assigned to the original interaction.

Example

A typical use of the GIID can be illustrated by the following example. When reviewing your customer relationship management (CRM) transactions, you need to find voice recordings of the related calls, both while they are still stored in the Bright Pattern Contact Center system and after they have been exported and stored elsewhere.

When configuring your system to support the above task:

- If you use one of the pre-integrated CRM applications, depending on your workflow, the GIID related to transactions handled by your agents may be available automatically as part of the *activity history* (see below). If this is not the case, consider using one of the available scenario integration blocks (e.g., [Fetch URL](#)) to store

the content of variable *\$(globalInteractionId)* as part of CRM transaction records associated with your calls.

- To make sure you can find voice recordings even after they have been exported out the system, add the *\$(GlobalInteractionId)* component to the [file names of exported recordings](#).

When looking for a voice recording related to your CRM transaction:

- Copy the GIID from the CRM transaction.
- Check the transaction date against the voice recording storage times agreed upon with your service provider (the default period is 90 days).
- If the voice recording is still stored within Bright Pattern Contact Center, open the [Interaction Records Search](#) page, select GIID as your search condition, and paste the GIID you have copied from your CRM transaction.
- If the voice recording is no longer within Bright Pattern Contact Center but has been exported for offline storage, look for the file containing the copied GIID on the location where the recordings are stored.

Note that depending on the workflow, your search may produce several voice recordings (e.g., recordings of call segments before and after a transfer, or a recording of an associated consult call).

How GIIDs Are Exposed

GIIDs are exposed via the data elements described in the following table. The "Where to Use" column names where the data element is used, and the "Data Element to Use" column describes the type and name of the element (i.e., field, variable, parameter, etc.).

Where to Use	Data Element to Use
Scenarios	<ul style="list-style-type: none"> • variable <i>\$(item.globalInteractionId)</i> - An Interaction property
Simplified Desktop .NET API	<ul style="list-style-type: none"> • <i>globalInteractionId</i> - A property of events <i>evtCallDialing</i> and <i>evtCallOffered</i> • <i>globalInteractionId</i> - An optional parameter of method <i>CallDial</i>
Desktop Integration API .NET Version	<ul style="list-style-type: none"> • <i>globalInteractionId</i> - A property of event itemArrivedCallback • <i>globalInteractionId</i> - An optional parameter of method makeCall
Salesforce.com integration	<ul style="list-style-type: none"> • <i>Call Object Identifier</i> - A field of Salesforce.com activity history
Zendesk integration	<ul style="list-style-type: none"> • <a href="https://<portal>/InteractionSearch?global_interaction_id=<x>">https://<portal>/InteractionSearch?global_interaction_id=<x> - The URL of Zendesk activity history; clicking this URL opens the Interaction Records Search page with the global interaction identifier preset as a search condition

RightNow integration	<ul style="list-style-type: none"> • <i>global_interaction_id</i> - A field from RightNow activity history
Reporting Database	<ul style="list-style-type: none"> • <i>global_interaction_id</i> - A field from the table call_detail
Detail Reports	<ul style="list-style-type: none"> • <i>Global ID</i> - A field from the Call Detail Report and Email Detail Report
Campaign Results	<ul style="list-style-type: none"> • <i>Global Interaction ID</i> - A field from the campaign results in detailed and simple formats
Exported voice recording	<ul style="list-style-type: none"> • <i>\$(globalInteractionId)</i> - An optional file name component of exported voice recording files • <i>Global Interaction ID</i> - A field of the recordings details .CSV file

Note the following:

- When two inbound calls are merged into a conference, the conference call gets GIID of the older call (the call that appeared in the system first).
- Consult calls initiated from a [hardphone](#) do not inherit GIID from the original call.
- GIID is not currently available as a scenario variable for the following types of interactions (because interactions of these types do not have exposed scenarios):
 - Preview campaign calls
 - Manual outbound and internal calls
 - Emails

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