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Manage your Contact Center in Agent Setup

Case and toast data

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 - 2.1 Creating a sharable Toast business attribute
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- Administrator

Case Data specifies the information to be displayed to agents when a call, chat, or other interaction is transferred to them.

Toast Data specifies the information to be displayed to agents when they directly receive a call, chat, or other interaction.

Related documentation:

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Case Data

On the **Case Data** page, you can specify the information to be displayed to agents when a call, chat, or other interaction is transferred to them.

Creating a sharable Case Data business attribute

Case data can be used as sharable business attributes for agents, agent groups, and the global contact center. To view an article about how to create sharable business attributes, see [Business attributes](#).

Tip

- To view an example of Case Data in Agent Workspace, see Interaction history views in *Agent Workspace Agent's Guide*.
- In the table of configured Case Data, in addition to selecting and adding Case Data, you can also filter items using the **Quick Filter** field, and **Delete** Case Data.

Selecting Case Data

Manage Case Data

Case data is the call information that is displayed about a call in progress.

Folder: / CustomerCase

+ Add Add Folder Delete

Quick Filter

Sort Case Data

select the folder and business attribute

select Case Data

LastName: Last Name

FirstName: First Name

Mandatory

Enum

Comma separated values

Read Only

1. Select a business attribute:
 - a. Select the folder you want to view from the **Folder** drop-down list box.
 - b. Click the second drop-down list box and select the business attribute for the Disposition.

You can consider a business attribute to be the container that holds a list of Dispositions that have a common theme.
2. Select a Case Data from the list.

Adding Case Data

Manage Case Data

Case data is the call information that is displayed about a call in progress.

Folder: / Case Data

+ Add Add Folder Delete

Quick Filter

Sort Case Data

Name

Display name

Mandatory

Read Only

Select the folder you want to view from the **Folder** drop-down list box.

1. Click the second drop-down list box and select the business attribute into which you want to add the Case Data.
2. Click **Add**.
3. Specify a name and display name.
4. Select **Mandatory** to specify that the case data is mandatory.

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5. Enable the **Read Only** option if you do not want the agent to be able to update the data. Or, select a data validation type, such as **Boolean**, **String**, **Integer**, or **Enum** which allows the agent to edit the data. If the case data is mandatory, the **Read Only** option is disabled.

Important

To configure the order in which the case is displayed in the UI, click **Sort Case Data** and follow the instructions in the dialog box.

Tip

To add a new folder to the list, you can do one of the following:

- Click **Add Folder**; or
- To add a subfolder, click the **Folder** drop-down list box, select a folder, and then click the **Add folder** icon.

Toast Data

On the **Toast Data** page, you can specify the information to be displayed to the agent when they receive a call, chat, or other interaction.

Creating a sharable Toast business attribute

Toast Data can be used as sharable business attributes for agents, agents groups, and the global contact center. To view an article about how to create sharable business attributes, see [Business attributes](#).

Tip

- To view an example of Toast Data in Agent Workspace, see Interaction history views in *Agent Workspace Agent's Guide*.
- In the table of configured Toast Data, in addition to selecting and adding Toast Data, you can also filter items using the **Quick Filter** field, and **Delete** Toast Data.

Selecting Toast Data

The screenshot shows the 'Manage Toast Data' interface. At the top, it says 'Manage Toast Data' and 'Toast data is the call information that is displayed for a ringing call.' Below this, there are two dropdown menus: 'Folder: /' and 'ToastData'. A black oval is drawn around these two dropdowns, with an arrow pointing to it from the text 'select the folder and business attribute'. Below the dropdowns are three buttons: '+ Add', 'Add Folder', and 'Delete'. To the right of these buttons is a 'Quick Filter' search box. At the bottom, there is a list of items. The first item is 'Toast: Toast' with a checkbox to its left. An arrow points from the text 'select Toast Data' to this checkbox.

1. Select a business attribute:
 - a. Select the folder you want to view from the **Folder** drop-down list box.
 - b. Click the second drop-down list box and select the business attribute for the Disposition.

You can consider a business attribute to be the container that holds a list of Dispositions that have a common theme.
2. Select a Toast Data from the list.

Adding Toast Data

Manage Toast Data

Toast data is the call information that is displayed for a ringing call.

The screenshot shows the 'Manage Toast Data' interface. At the top, it says 'Manage Toast Data' and 'Toast data is the call information that is displayed for a ringing call.' Below this, there are two dropdown menus: 'Folder: /OneCloud/' and 'Test Case Data'. To the right of these dropdowns is a blue button labeled 'Sort Toast Data'. Below the dropdowns are three buttons: '+ Add', 'Add Folder', and 'Delete'. To the right of these buttons is a 'Search Items' search box. Below the search box is a section titled 'Name:Display Name' with a dropdown arrow. This section contains a list of items: 'ANI:ANI' and 'DNIS:Dialed Number', each with a checkbox to its left.

Select the folder you want to view from the **Folder** drop-down list box.

1. Click the second drop-down list box and select the business attribute into which you want to add the Toast Data.
2. Click **Add**.
3. Specify a name and display name.

Important

To configure the order in which the toast data is displayed in the UI, click **Sort Toast Data** and follow the instructions in the dialog box.

Tip

To add a new folder to the list, you can do one of the following:

- Click **Add Folder**; or
- To add a subfolder, click the **Folder** drop-down list box, select a folder, and then click the **Add folder** icon.