Manage your Contact Center in Agent Setup

Case and toast data

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Contents

- 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:

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.

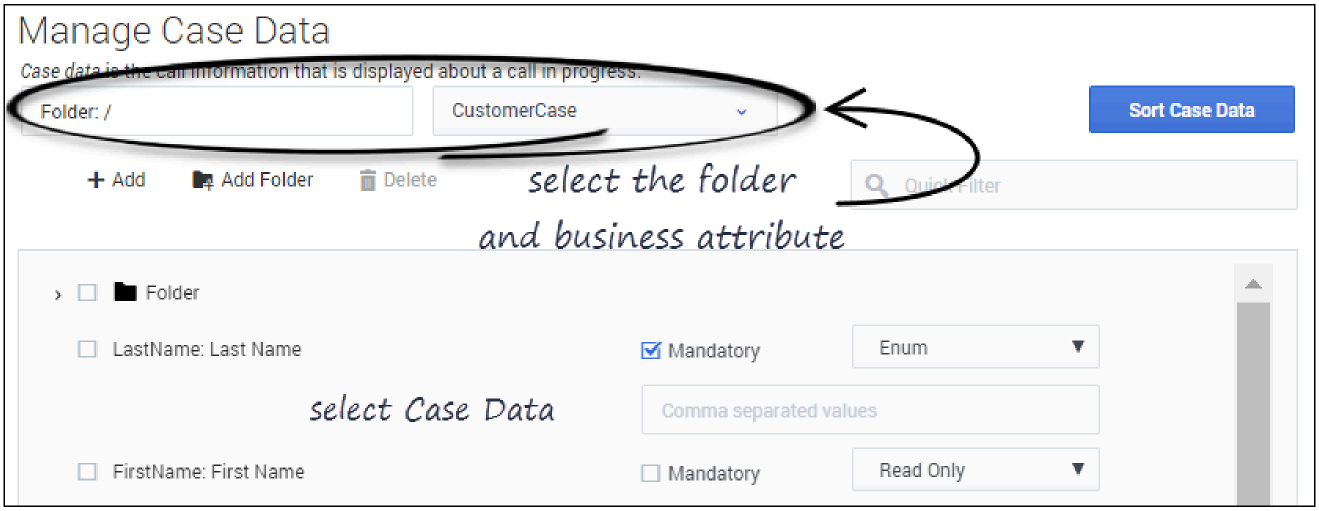
Creating a sharable Case Data business attribute

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.

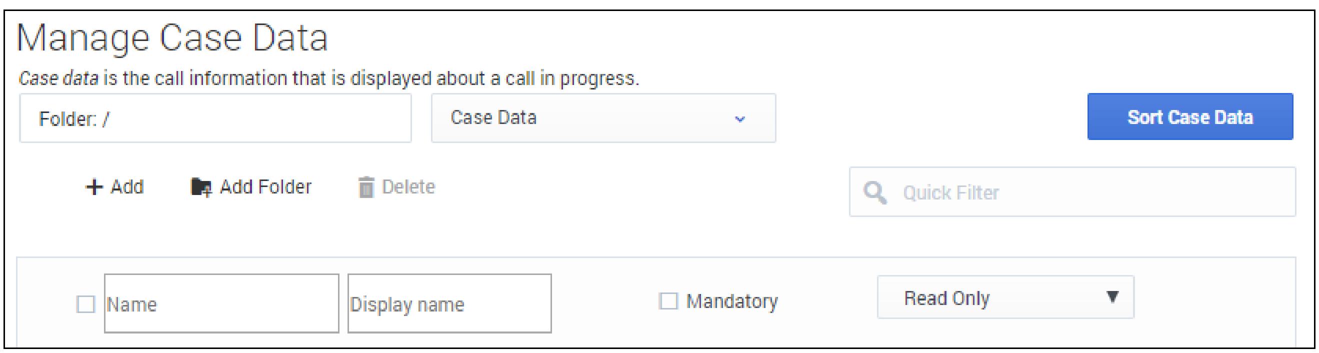
Selecting Case Data



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



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.

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

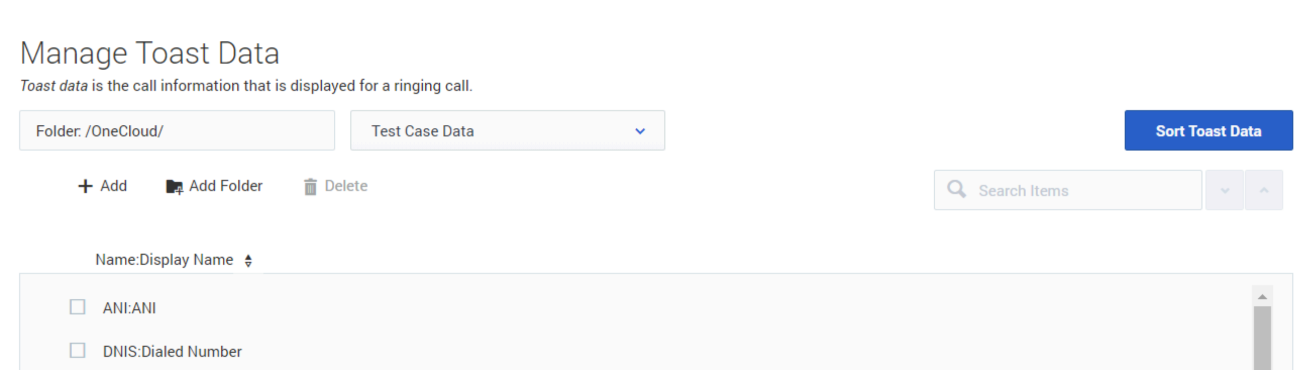
- To view an example of Toast Data in Agent Workspace, see Interaction history views in *Agent Workspace Agent's Guide*.
- In the table of configured Toast Data, in addition to selecting and adding Toast Data, you can also filter items using the **Quick Filter** field, and **Delete** Toast Data.

Selecting Toast Data

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



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.