Workspace Desktop Edition Help

Case Data

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Case Data

The Case Data (attached data) view provides information about an interaction—for example, an account number or type of service. Your system administrator configures which attached data is displayed.

The following are examples of the type of critical information that the Case Data view provides about the active interaction:

- Contact name
- Contact type
- Call type
- Account information
- Subject

The Case Data view is part of the Interaction view and the History tab of the Contact Directory view.

Hyperlinks

Some Case Data might be a URL (website address). If you are configured to preview the URL target, you can place your mouse pointer over the URL to display a preview of the target. You might also be configured to click active URLs in the Case Data to open the target in the interaction window. A URL might be displayed as the title of the web page, as an anchor, or as a URL. If the URL is active, it is displayed as blue text.

Editing Case Data or Adding Missing Fields

You might be configured to edit one or more entries in the case-data area. Any field that can be edited displays a Pencil icon when you place your mouse pointer over it. Click the field to edit the content. Press the Enter key or click away from the field to commit your change.

Sometimes, not all of the case data is available. There might be fields missing. If you are configured to add missing fields, the **Add Field** () button is displayed in the Case Data toolbar. Click **Add Field** to display a drop-down list of fields. Select a missing field to display the field in the Case Data view. You can edit he added field. Enter the missing Case Data, then press **Enter** to add the Case Data to the case information for the interaction. Click **X** to remove the field.