CX Contact Help

Search for and Manage Contacts

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Important

The content of this document has been moved and is no longer being updated in this location.
For the latest content and most recent updates, see the CX Contact Help on the Genesys Multicloud site.

Use the features in the List Details View page and/or the Contact Search page to browse a selected Contact List, optionally applying filtering rules, as well as to perform actions such as:

- Add a contact
- Find a contact

List Details View

Use the List Details View page to do the following:

- View records within a contact list.
- Search lists for a specific contact.
- Apply filters to a contact list to drill down into your data.

A summary of the number of contacts and devices is provided above the List Details View you. The summary includes the following information:

- Contacts in List – Indicates the number of contacts/unique customer records in the entire list.
- Devices in List – Indicates the number of devices in the entire list.
- Contacts in Filter – Indicates the number of contacts/unique customer records in the filtered list.
- Devices in Filter – Indicates the number of devices in the filtered list.

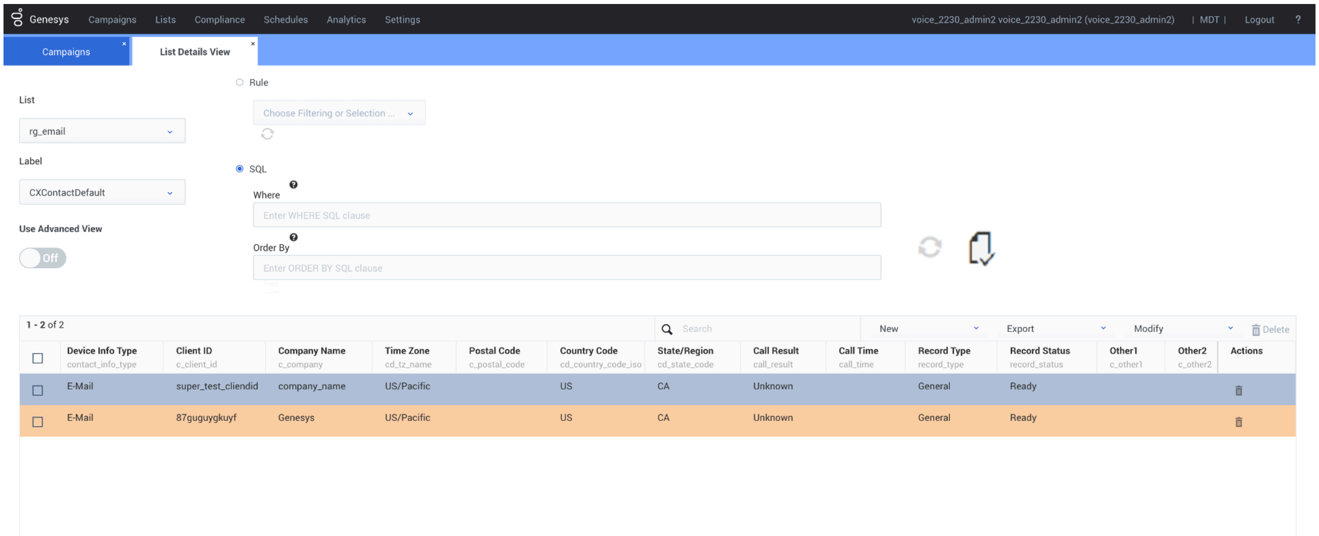
The table below describes the available List Details View options.

Important

- All Filtering rules, and Selection rules (Contact and Advanced) are accessible from the **Rule** drop-down list. With this option you can apply previously created selection and filtering rules.
- The records in the List Details View are automatically color grouped. Each color represents a different customer. Since each customer can have more than one device, the colors enable you to view which records belong to the same customer.

Option	Description
List	Select the Contact List that you want to view.
Rule	Select the filtering rule that you want to apply to the selected contact list.
Refresh	Click Refresh to reload and update the selected Contact List.
Label	Select a label from the list provided to specify the Contact List type.
Use Advanced View	Turn Use Advance View on to view additional Contact List columns.
Export	The selected records will be exported. **Note:** • If you do not select one or more records all of the records will be exported to a **.csv** file. • When **order by** is applied to the contact list, the records in the exported **.csv** file will appear in the same order. • The Export to CSV option is disabled when the contact list is viewed as a **Secured** list.
SQL	Enables you to filter the list according to the following free-form SQL entries: • Where - Enter an SQL filtering expression to apply to the selected contact list. • Order By - Enter an SQL ordering expression to apply to the selected contact list. Click  to create a filtering rule from the List Details View. With this option you can test and validate SQL queries against uploaded contact lists and save the active query as a filtering rule for future use. **Note:** When you assign a name to the filtering rule, a selection rule is saved as <FilteringRule_name>_SelectionRule.
New	Select to create a new contact list record.
Modify	Select to modify the selected record.

To view the options described in the table above, click the following image to enlarge it.



Contact Search

Use the Contact Search page to do the following:

- View all contacts within a list - Leave the Last Name field empty and click **View Contacts**.
- Search for a single contact for a particular list - Type the first few letters of the last name in the Last Name box, select the list from the List menu, and click **View Contacts**.
- Add a new contact - Click **New Contact**.
- Delete a contact - Select the box next to the contact's name and then click the trash can icon.

Important

If a contact you're searching for has multiple devices, the search results will display a separate record for each device. For example, if a contact has three devices, the Contact Search results will return three separate results for the contact - one for each device.

For more information about contacts and contact lists, visit the Create and Manage Contact Lists page.