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Genesys Engage Workspace Web Edition Help

[Contacts](#)

Contacts

Contacts can be team members or customers and are stored in the Contact Directory. From the Contact Directory, you can call or email a contact, manage a contact's profile information (such as their name, phone number, email address), and review a contact's past interactions.

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Where are my contacts?

[Link to video](#)

There are a few different ways that you can access your contacts:

- Open your Contact Directory by selecting **Contact Directory** from the Supporting Views menu. This contains all of your contacts, such as team members, customers, and any external contacts.
- Use the **Team Communicator** to quickly contact a team member, or a favorite or recent contact. This tool is accessed from the **Type name or number** search bar near the top of the screen (or by clicking



the button, if you are working with an interaction).


Watch the video to see an overview of the Contact Directory.

How do I find a contact in the Contact Directory?

[Link to video](#)

The easiest way is to use the **Quick Search** option.

Start typing a name, phone number, or email address into the **Quick Search** field and the matching results are returned in the **Contact** list.

Customize the search results by using  to toggle between grid or list view, or click the headers to sort by column (list view only).

Watch the video to see how you can search the directory and customize the results.

What is the difference between List View and Grid View?

The Contact Directory uses two different kinds of search modes to find contacts in the Contact Database.

- List View — searches each field of the contact database for the keywords that you specify and displays an unsorted list of all of the contacts in the contact database that match the search criteria.
- Grid View — searches each field of the contact database for the phrase that you specify and displays a list of records where at least one record field contained the search phrase.

See below for more details about these views.

List View

Click the **Show Contacts in List View** button (☰) to display the **Contact Directory List** view.

The List view displays an unsorted list of all of the contacts in the contact database that match the search criteria.

The search is a 'keyword' search that searches each field of the contact database (name, phone number, email address, or other criteria) for the word or words that you provide in the search field. The search engine tries to match *any* word of each field specified in the search criteria (that are allowed by your administrator for Quick Search or that you manually specified for Advanced Search) of the database by using the selected matching mode 'starts with' to search for the keyword(s) that you provide.

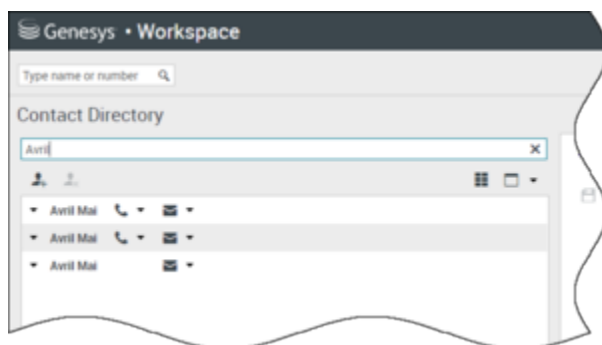
Examples:

- Quick search using the keywords *John Daly* as the criteria in a quick search defined to apply to only the **First Name** and **Last Name** fields will match a contact where **First Name**=*John* and **Last Name**=*Daly*
- Quick search using the keywords *John Junipero* as the criteria in quick search defined to apply to only **First Name**, **Last Name**, **City**, and **Address**, will match a contact where **First Name**=*Johnny* and **Address** = *2001, Junipero Serra Blvd.*

Results are returned in a list that is not sortable. If the result set is too large, you can refine the search results by adding more keywords to your search criteria (the sort order in this context is undefined).

Tip

Genesys does not currently support mixed character sets in contact database searches, so, for example, it is not possible to search for words in Chinese Simplified characters and Latin characters in the same search string, and the sequence of Chinese Simplified characters immediately followed by Latin characters will not be considered as two words.



Grid View

Click the **Show Contacts in Grid View** button (☐) to display the **Contact Directory Grid** view.

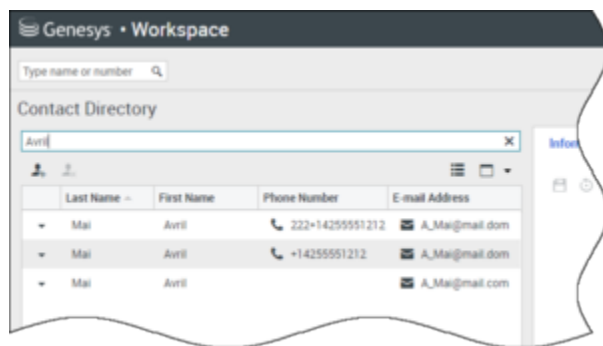
Grid mode performs a search that considers each field of the contact database (name, phone number, email address, or other criteria) as a *phrase* (as opposed to the list view mode that considers each field as a *tokenized* list of words) and uses the search criteria that you provide as a *phrase*, not as a list of words.

Examples:

- Quick search using the phrase *John Pa* as the criteria in a quick search defined to apply to only the **First Name** and **Last Name** fields will match a contact where **First Name**=*John Paul* and **Last Name**=*Doe*
- Quick search using the phrase *John Daly* as the criteria in quick search defined to apply to only the **First Name** and **Last Name** will *not* match a contact where **First Name**=*John* and **Last Name**=*Daly*

Results are returned in tabular form and sorted according to the default search field, such as **Last Name**.


The Grid view can be used to help to refine your search by sorting the results.



Click a column head in the Grid view to sort the list based on that criterion. Click a column head a second time to switch between ascending and descending sort order.

What actions can I take with a contact?

Link to video

- **Call** or **email** the contact.
- View and manage their profile **Information**.
- View their **History** of interactions.
- Use  to delete the contact.
- Use **More Actions** to perform other actions (depends on your permissions).

Watch the video to see how you can call or email a contact from the Contact Directory.

How do I work with an interaction with an unknown contact?


The screenshot shows the 'Information' tab of a contact record. At the top, there are tabs for 'Information' and 'History'. Below the tabs, there are icons for 'Save' and 'Reset'. The form is organized into sections: 'General' with fields for Title (Mr.), First Name (Mark), and Last Name (Avram); 'Phone Number' with fields for Office (1.555.654.7890) and Mobile (3317), and a 'Primary' radio button selected for the Office number; and 'E-mail Address' with a field for Work address (rkAv@mail.dom). Each field has a red flag icon and a delete 'X' button. At the bottom of each section, there is an 'Add' button with a dropdown arrow.


Your Genesys software administrator has the option to set up your contact center to handle interactions with contacts that are not already in your organization's contact database.

Your contact center might be set up to create new contacts automatically when someone calls in from an unknown phone number. In that case, all you have to do is update the contact information in the **Contact** tab of the interaction with the rest of the contact's information, such as name, email address, and so on.

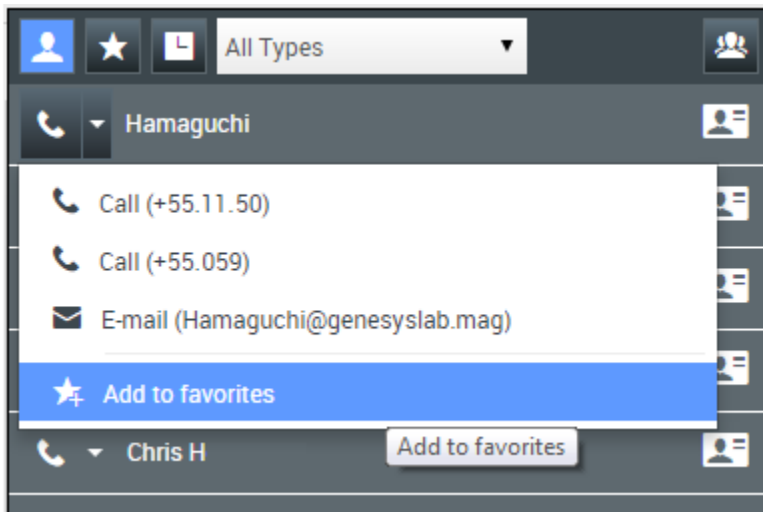
Your contact center might be set up so that no new contact is created when someone calls in from an unknown phone number. In this scenario, you might be granted the ability to create a new contact and add him or her to the contact database manually. If this feature is enabled for you, follow these steps:

1. Click **Create new contact** to open the contact **Information** view and create a new contact.
2. Add the contact's information in the information fields. You can also add additional phone numbers and email addresses for the new contact, and specify a phone number or email address as the *primary* contact number or address.
3. Click **Save** to save the contact's information to the contact database.

4. If you decide not to save the new contact information, click **Reset**  to reset and clear any unsaved information.


Your contact center might be set up so that you do not have the capability to create a new contact when someone calls in from an unknown phone number. In this scenario, the **Create new contact**  button and the contact **Information** tab are not displayed. In some contact centers you can still search for completed voice interactions from unknown contacts in the **My History** and **Interaction Search** views, but in other contact centers, interactions from unknown contacts are not saved in the contact database.

How do I set up my favorites?




Typically, your favorites are team members you contact frequently. You can mark a contact as a favorite by selecting **Add to Favorites** from the drop-down actions menu in **Team Communicator**. You can also assign the favorite to a category.

To see your personal and corporate favorites, select  (favorites filter) on the **Team Communicator** bar.

Favorites are marked with a  (star). Use the filters and sorting options to change the types, categories, and order of your favorites.

To make changes to a favorite, use **Edit Favorite**. To remove a favorite, use .

Favorites marked with  (locked star) are corporate favorites, and can't be edited or removed. The same favorite can belong to both your personal and corporate favorites, but it will be shown as a corporate favorite in the results list.

Note: A favorite that you created by directly dialing a contact will appear only in a favorites search

and your list of recent calls if you previously called the person.