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Workspace Desktop Edition Deployment Guide

Managing Contacts

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Contact Management

Interaction Workspace enables agents to manage contacts. The privileges that can be enabled for an agent are the following:

- View Contact Record
- Edit Contact Record
- Delete Contact
- Create Contact
- Merge Contact
- Manually assign an interaction to a Contact
- Undo Merge Contact
- Search the Contact database
- Interaction Threads
- Interaction Ownership
- Populating the Contact History with eServices Interactions
- Resend email interactions from the Contact History

Use the options in the contact section to configure the way in which agents can manage contacts.

- `contact.directory-displayed-columns` -- The list of contact fields displayed when the results of a contact search is rendered.
- `contact.directory-search-attributes` -- The list of Contact fields that can be used as search parameters.
- `contact.displayed-attributes` -- The list of Contact fields that are displayed when a Contact record is rendered.
- `contact.multiple-value-attributes` -- A list of contact attributes that are allowed for use as contact field names.
- `contact.directory-search-types` -- The list of search types that are available for the agent to use to search the contact database. Specifying the value contains may have a performance impact.
- `contact.default-directory-page-size` -- The default value for the number of rows per page in the contact directory search result grid view. A value must be defined in the `contact.available-page-size` option.
- `contact.available-directory-page-sizes` -- The number of rows per page in the contact directory search result list view.
- `contact.timeout-delay` -- The delay, in seconds, before a UCS request times out.
- `contact.history-displayed-columns` -- Defines the list of Contact History items that are displayed in the interaction view.
- `contact.history-search-attributes` -- Defines the list of Contact History items that an agent can

use to search the History database.

- `contact.history.media-filters` -- Specifies the list of media types that can be used to filter the Contact History.
- `contact.history.filters-service` -- Specifies a custom business attribute that is defined in Universal Contact Server that can be used to search the contact history.
- `contact.history.filters-level` -- Specifies a custom business attribute that is defined in Universal Contact Server that can be used to search the contact history.
- `contact.date-search-types` -- The list of search types that are available for the agent to use to search the contact database by date.
- `contact.lookup.enable` -- Specifies that the Universal Contact Server (UCS) identify service is to be used for contact lookup.
- `contact.lookup.enable-create-contact` -- Specifies that the Universal Contact Server (UCS) create a contact service is to be used if the identify service fails to find the contact.
- `contact.ucs-interaction.enable` -- Activates the Interaction Workspace feature that generates the voice interaction history in Universal Contact Server (UCS) based on the inbound and outbound interactions handled by Interaction Workspace.
- `contact.ucs-contact.attributefielddefaultmaxlength` -- The maximum field length for attributes in Universal Contact Server (UCS).

Interaction Threads

Interaction Workspace enables you to manage interaction threading in the Universal Contact Server (UCS) database. E-mail threading is set according to reply actions that are made by agents, automatic response, and contacts. Voice threading is set according to the transfer record of a call; each agent that handles the interaction generates an interaction in the UCS database. The `contact.threading-ucs-interaction.enable` option controls how multi-channel threading that results from the outbound interactions that are created during the handling of an original inbound or outbound contact interaction. For example, an inbound email might result in an outbound email, or or more outbound voice calls, and an SMS session. All of these related interactions can be associated as a single thread. In the Interaction Workspace Contact Directory and My History views, agents can view the interaction history as threads. Threads are sorted in reverse chronological order, with the most recent first, but within threads, interactions are sorted chronologically, from first to most recent. To use interaction threading, enable the following privilege:

- Can Use Contacts

Then, configure the following configuration option to `true`:

- `contact.threading-ucs-interaction.enable` -- Enables the Interaction Workspace feature that associates interactions that are submitted during multi-channel contact communication, such as `smssession`, in threads in Universal Contact Server history.

Interaction Ownership

Interaction Workspace enables you to display the interaction owner that is defined in the UCS data base to the agents that can view the Contact History.


Display of interaction ownership is controlled by the following options:

- `display-format.agent-name` -- Specifies the format of the agent name in the Contact History view. Interaction Workspace uses this information to convert the owner ID from UCS to a label that is displayed in the Contact History view. If there is no owner ID associated with an interaction, then this field is blank.
- `contact.history-displayed-columns` -- Specifies which interaction attributes are displayed in the Contact History view. Add the value `OwnerId` to display the Interaction "Processed by" column.

Populating the Contact History with eServices Interactions

eServices interactions differ by type in the way that they are submitted to the Contact History:

- `email` -- E-mail interactions are automatically submitted to the Contact History by Email Server and Interaction Workspace. They are completed by Interaction Workspace or by a Business Workflow.
- `chat` -- Chat interactions are automatically submitted to the Contact History by Chat Server. They are completed by Interaction Workspace or by a Business Workflow.
- `SMS Session` -- SMS Session interactions are automatically submitted to the Contact History by Chat Server. They are completed by Interaction Workspace or by a Business Workflow.
- `SMS Page` -- SMS Page interactions are submitted to the Contact History by a Business Workflow only. This is applicable to both inbound and outbound workflows.
- `workitem` -- Custom workitem interactions are submitted to the Contact History by a Business Workflow only. This is applicable to both inbound and outbound workflows.

 **Notes:**

- If the Contact History is created by a Business Workflow, the integrator is responsible for using the appropriate building blocks in the *ad-hoc* strategy.
- Interaction Workspace can submit interactions to the contact history if the `contact.ucs-interaction.<media-type>.enable-create` option is set to `true` for any media.
- Interaction Workspace can look for a matching contact for any media-type if the `optioncontact.ucs-interaction.<media-type>.enable-lookup` option is set to `true`.

Media Filtering

The **Filter** menu of the Contact History view and My History view can be configured to display specific media types in a specific order by using the `contact.history.media-filters` option in the `interaction-workspace` section of the Interaction Workspace application object. You can use this option to add the media types of the workitems that are supported by 3rd party plug-ins.