Workspace Desktop Edition Help

Contact Directory

4/3/2025

Contents

Contact Directory

The Contact Directory view enables you to manage contact information.

The **Contact Directory** enables you to do the following:

- Find contacts
- Manage or call contacts by using contact actions
- Assign interactions with unknown contacts to a known contact

The following are examples of the type of the fields that are available in the Contact Directory view:

- Title
- First name
- Last name
- Address
- E-mail address
- Phone number
- Other criteria

To view the contact directory, click the **Contact** button on the Interaction Workspace Main Window. The Contact Directory view is contained in a tab that opens below the Main Window.

Contact Actions

Select a contact from the search results, list view, or grid view to perform any of the following actions:

- Delete the contact
- Call the contact if there is a phone number in the contact database
- Create an outbound e-mail if there is an e-mail address in the contact database
- Merge or unmerge the contact
- View contact information
- View contact history

You can double-click a contact in the search results, list view, or grid view to open the Contact information and history views.

Finding Contacts

You can search the contact database in one of two ways:

- Quick Search
- Advanced Search

Your administrator might configure your system to enable you to search only the contacts that are related to your work.

Quick Search

To search the contact directory, type the name, phone number, or e-mail address of a contact in the Quick Search field. Quick Search is a *begins with* search. You can use the standard Windows wildcard characters to expand your search.

Contact Quick Search

Click the magnifying glass to search for the value that you have entered.

The contact database is search based on your criteria and the search results are displayed in the Contact Directory.

Click the **X** to clear the Quick Search field.

Advanced Search
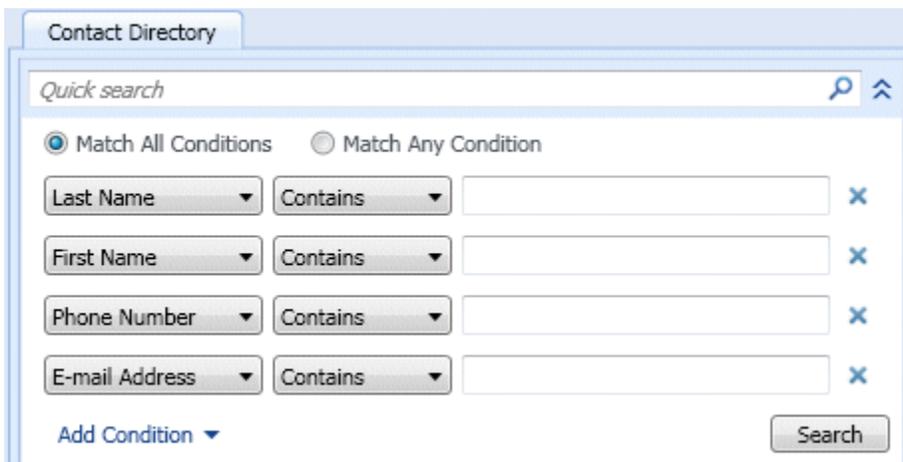
Contact Directory

Click the **Add Condition** link to add more search criteria. Remove criteria from consideration by clicking the **X** next to the option.

Click the magnifying glass to search for the value(s) that you have entered.

The contact database is search based on your criteria and the search results are displayed in the Contact Directory.

Click the **X** to clear all search field.

Search Results

Search results are displayed in a list or in a tabular grid.

Contact Directory

Use the **Show Contacts** in Grid/List View ( ) button to toggle back and forth between the two views.

Page Controls

Page through the list of search results by doing any of the following:

- Click the **Go to the Next Page** button ( ) to view the next page.

- Click the **Go to the Previous Page** button ( ) to view the previous page.

- Click the '*Go to First Page* button ( ) to return to the start of the list of search results.

- Specify the number of items that are displayed on each page by using the **per page** drop-down list.

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 for the word or words (name, phone number, e-mail address, or other criteria) that you provide in the search field. Each field of the database is searched by using a "starts-with" search for the keyword(s) that you

provide.

Results are returned in a list that is sorted according to the rules of Lucene scoring. In most cases, you can refine the search results by using the filtering features of the list view. For example, you can filter your search results so that only contacts or favorites are displayed.

Use the page controls to navigate the list. Click a contact to select it for an action. Use the Grid view to sort the search results based on contact attributes.

Contact Directory

Grid View

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

Grid mode performs a *begins-with* search that searches each field of the contact database for the phrase (name, phone number, e-mail address, or other criteria) that you provide in the search field.

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.
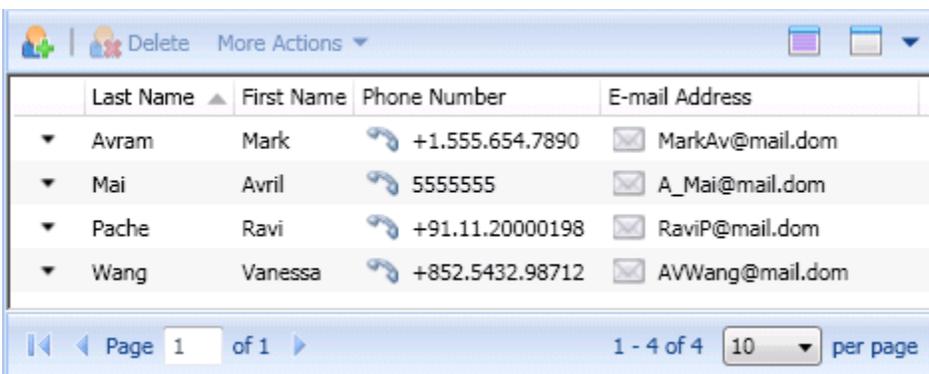
Quick Search results

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. Use the page controls to navigate the list. Click a contact to select it for an action.

Call or E-Mail Contacts

To call or e-mail the contact that you have selected in the search results, do one of the following:

- Click the **Contact** icon next to the contact name and select the number that you want to call from the Action drop-down list.

Contact icon

- Click the **Phone** icon to call the contact using the primary phone number associated with that contact. Click the Phone icon drop-down list to select the number that you will use to call the contact. If you are sending an e-mail, click the **E-Mail** icon.
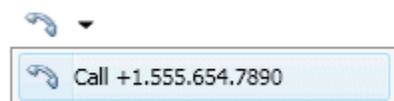
Phone icon

- In the **More Actions** drop-down menu, select the number or e-mail address that you will use to call or send an e-mail message to the contact.
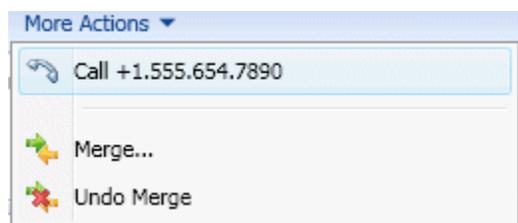
Call Contact More Actions menu

Any of these actions launches the outgoing Voice Interaction view. Use this view to handle the voice interaction.

Add Contacts

If you are configured to do so, you can add new contacts to the contact database by clicking the **Add Contact** icon ( ) to launch the Add Contact view in the Contact Information tab.
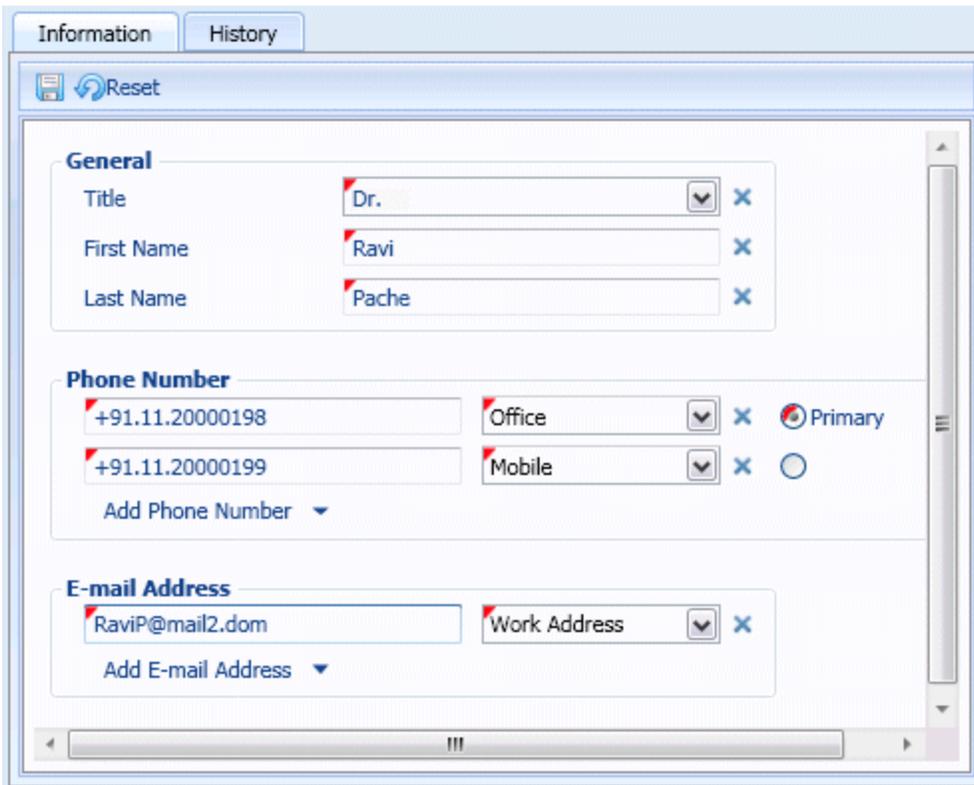
New Contact view

Enter the contact information in the fields. A small red triangle appears in the top left hand corner of the text field to indicate that the information is not saved. Do one of the following:

- Click the **Save** icon ( ) to save the information in the contact database.

- Click the **Reset** icon ( ) to clear any *unsaved* changes from the Add Contact view.

If you want to add additional phone numbers and e-mail addresses for the new contact, click the **Add Phone Number** or **Add E-mail Address** button. A new set of fields is added into which you can enter this information.

To specify a phone number or e-mail address as the *primary* contact number or address, click the **Primary** radio button next to the phone number or e-mail address that you want to specify as the primary for the contact.

Primary Phone Numnber

Delete Contacts

To delete a contact, you must first find the contact in the contact database and then select it in the Contact Directory.

Select one or more contacts that you want to delete, then click the **Delete** icon (![Delete icon]).

A confirmation dialog box is displayed. Click **OK** to remove the contact from the contact database permanently. Click **Cancel** to cancel the delete contact function; this leaves the contact in the contact database.

Merge and/or Unmerge Contacts

To Merge or Unmerge a contact, you must first find the contact in the contact database and select it in the Contact Directory.

Merge Contacts

If there are two contact entries in the contact database for the same contact, you can merge the two entries into a single entry.

First, find the contact in the contact database, then select it in the Contact Directory.
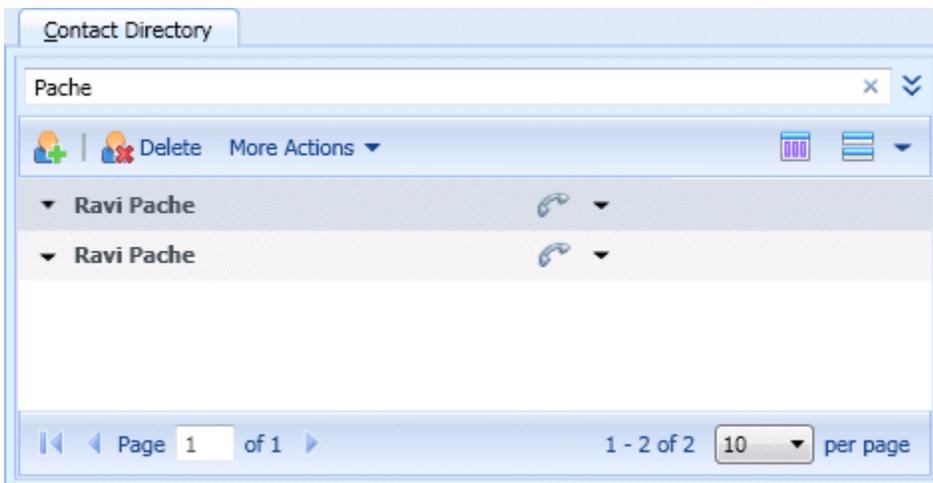
Merge selected contact

Click the **More Actions** menu and select **Merge**.
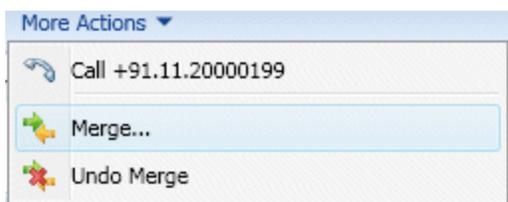
Merge More Actions menu

The Merge Contact dialog box is displayed. Use the search tools to find the duplicate contact, and then do one of the following:

- Click **Merge** to complete the merge of the two contact entries.
- Click **Cancel** to cancel the merge and return to the Main Window.
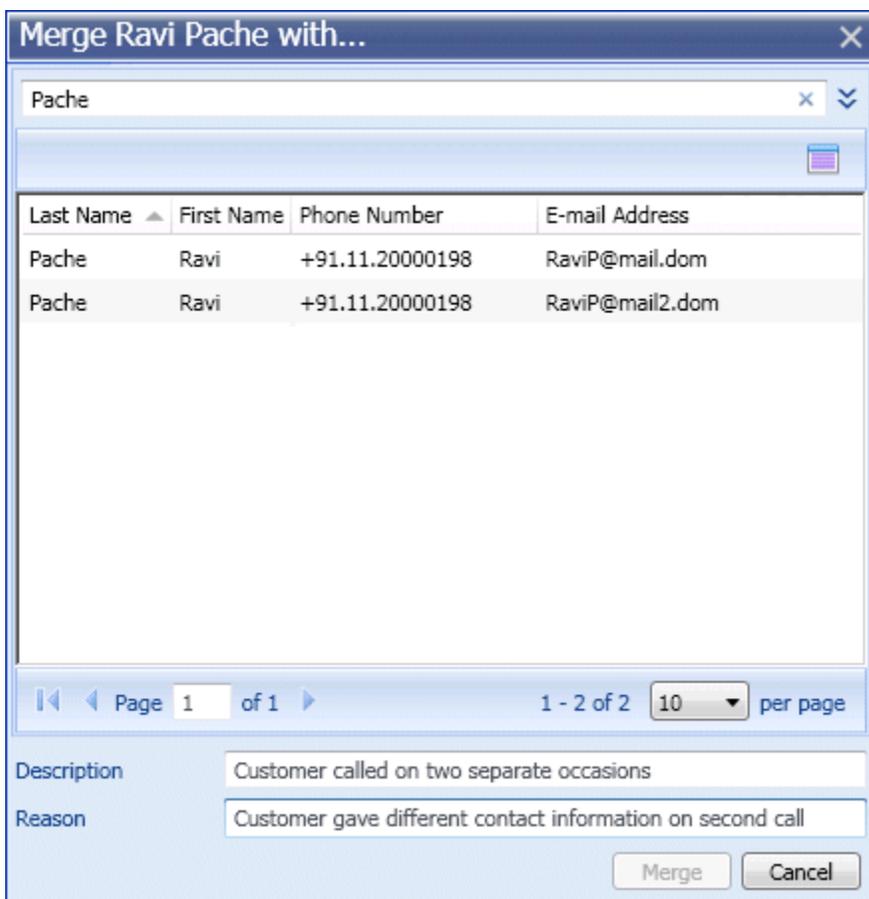
Merge with Contact dialog box

You might be required to enter a **Description** and/or **Reasons** for the merge. Use the fields after selecting the duplicate contact.

Unmerge Contacts

If there are two contact entries in the contact database that have previously been merged, you can

unmerge them into their original contact entries.

First, find the contact in the contact database, then select it in the Contact Directory.

Click **Undo Merge**. A confirmation dialog box is displayed. Click **Yes** to unmerge and **No** to keep the contact merged.

Contact Information and Contact History

Click the **Show Details Panel on Bottom/Hide Details Panel** button to show or hide contact information and contact history for the currently selected contact.
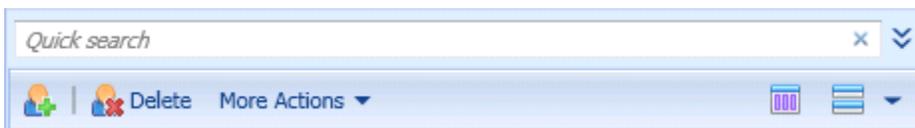
Contact Directory tool bar

The Contact Information view enables you to view and, if you are configured to do so, edit information for the currently selected contact. You might also be configured to assign an unknown interaction to a contact in the contact database by using the Manual Contact Assignment feature.
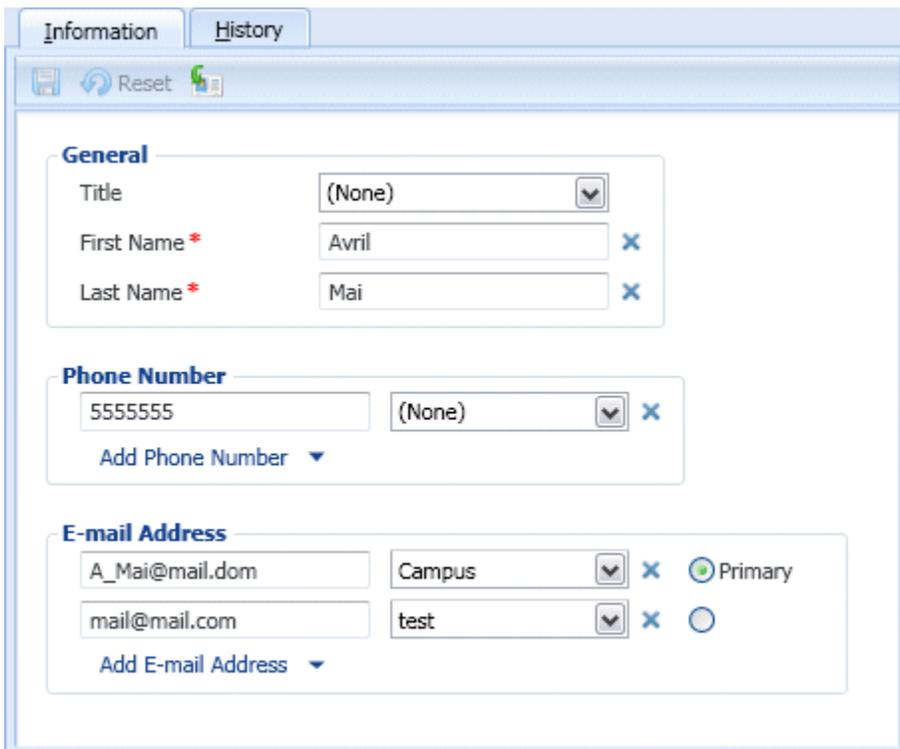
Contact Information view

The **Show Details Panel on Bottom/Hide Details Panel** () button in the Contact

Information view specifies where the Contact Information view is placed in the Contact Directory view: next to the directory or below the directory.

The Contact History view tab enables you to view and, if you are configured to do so, edit current and archived interactions that are associated with the currently selected contact.
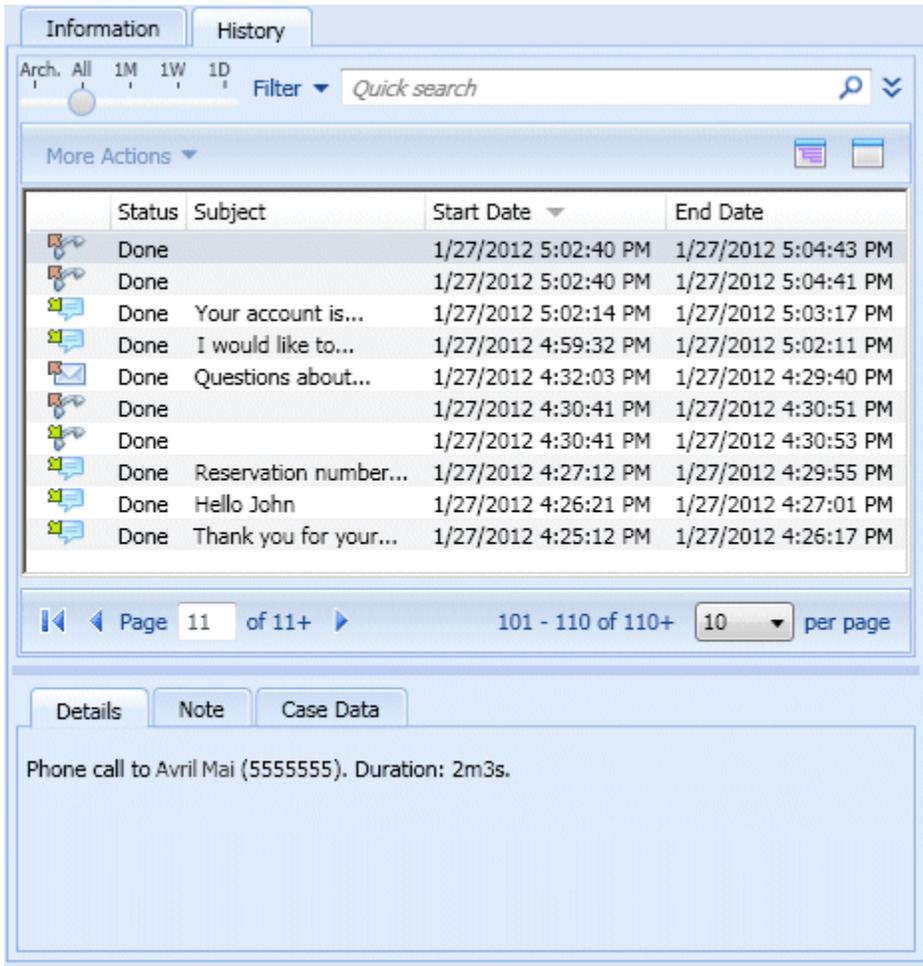
Contact History view

Change Contact

The Change Contact view enables you to assign a different contact for the selected interaction.

If an interaction has been incorrectly assigned to a specific contact, or if a new contact was created for an interaction when the contact already existed in the contact database, you can assign an open interaction to a specific Contact by using the **Change this interaction to contact** view.

In the **More Actions** menu, select **Change Contact**. The Change this interaction to contact view is displayed.

Use the Quick Search or the Advanced Search to find the Contact to whom you want to assign the interaction that you selected in the My History view or the Contact History view.
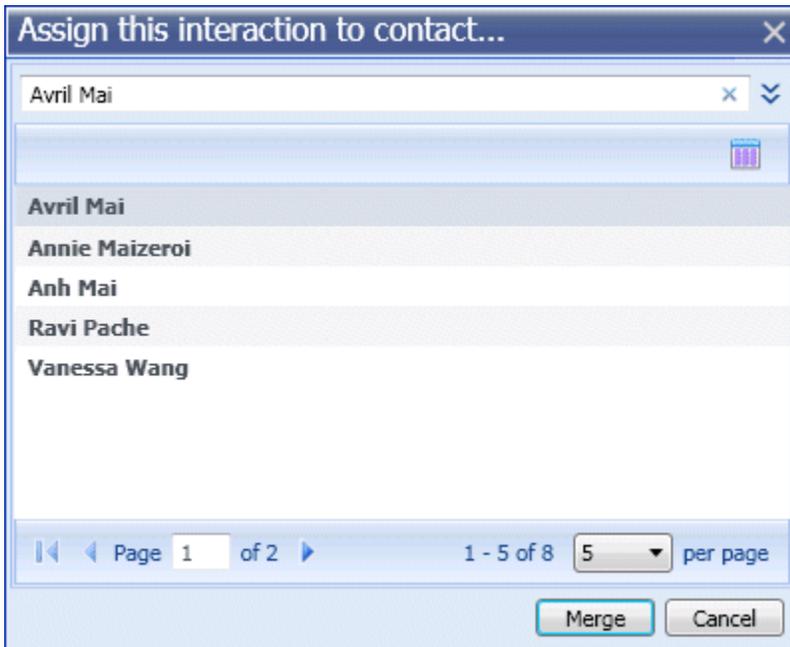
Assign This Interaction to Contact dialog box

Select the contact from the result list and then click **Merge** to assign the interaction to the Contact History for the selected contact. Click **Cancel** to return to the My History view or the Contact History view without assigning the interaction to a contact.

You can verify that the update to the interaction record was completed correctly by selecting the interaction in the My History view or the Contact History view and checking the Details tab. You can also search for the interaction in the contact database.

You can also use the **Assign Another Contact to This Interaction** button to manually reassign an interaction that has been incorrectly assigned to the wrong contact.