Workspace Desktop Edition Help

Contact History

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Contact History

The Contact History view enables you to view and manage previous interactions with a contact that you have selected from the Contact Directory or from the Information view of the current voice, chat, e-mail, or workitem interaction.

Use the Contact History view to do the following:

- Find interactions for the current contact or the currently selected contact.
- Perform the following actions on selected interactions:
  - Mark Done past voice and chat interactions that are still open.
  - Change Contact for the selected interaction if the status is **In-Progress** (not supported for all media types).
  - Reply or Reply All to e-mail interactions.
  - Resend a previously sent e-mail.
  - Open in-progress inbound and outbound e-mail interactions (that are in the process of being routed out of and into workbins and queues).
- View information about the selected interaction.

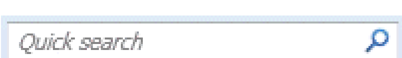
Finding Interactions

Interactions are stored with various attributes. You can use these attributes to find specific interactions. Search results are shown in the interactions table. You can view, filter, and perform actions on the interactions that you select. Your administrator might configure your system to restrict your search results.

Quick Search

The Quick Search enables you to search for any attribute that begins with the criteria you enter. For example, you could search for a disposition code of "Transferred" or find all interactions that are related to the subject of "billing".

To search the contact history, enter into the **Quick Search** field the attribute value for which you are searching. Quick Search is a *contains* keyword search. You can us the standard Windows wildcard characters to expand your search.



History tab Quick Search

Click the magnifying glass to search for the value that you have entered. Click the **X** to clear the **Quick Search** field.

Advanced Search

Click the **Show/Hide Advanced Search** () toggle button to show or hide the advanced search feature.

The Advanced Search feature enables you to use multiple criteria to refine your search. The Advanced Search pane contains drop-down lists of search criteria, such as Status, Subject, Start Date, and End Date.

From the column of search modifiers to the right of the attribute column, choose how the search string should be considered.

Menus for pre-defined fields, such as Status, contain the pre-defined field names from the database—for example, **All**, **Done**, and **In-Progress**.

Menus for date fields contain the following choices:

- **On**—The exact date.
- **On or after**—The specified date or any date after.
- **Before**—Before the specified date.

Menus for text fields contain the following choices:

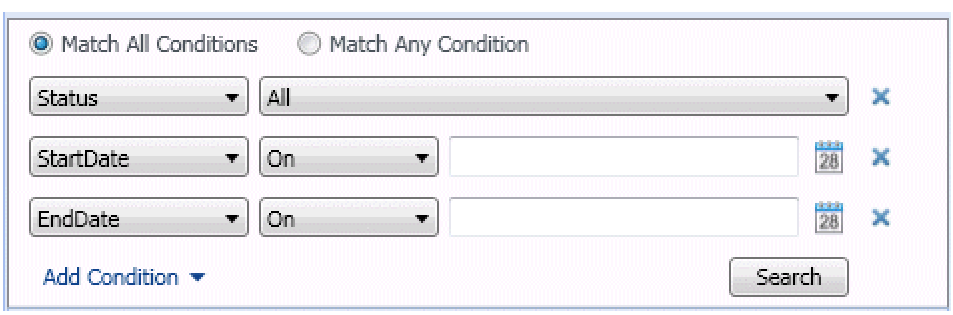
- **Contains**—The specified text string occurs anywhere in the selected criterion.
- **Begins With**—The specified text string occurs at the beginning of the selected criterion.
- **Is**—The specified text string exactly matches the criterion.

Enter the search value in the text field on the right side. If your criterion is a start date or end date, use the calendar pop-up window to specify the date.

Note: You can use standard Windows wildcard characters in your specified search strings.

Use the **Match Conditions** options to specify whether **All** or **Any** of the search conditions that you have specified are applied.

To search based on the Start Date, use the calendar icon () to select a date, or enter the date in the format that conforms to your local day and time display preferences.



History tab Advanced Search

Filtering

The Contact History view filtering controls enable you to refine your search. The chronology slider enables you to search the contact history by time interval.

History tab Time Filter

The slider has five positions that represent different time intervals:

- **Arch.**—Search the database for messages that have been archived
- **All**—Search the entire database from the most recent interaction back to the earliest interaction
- **1M**—Search the database from the most recent interaction back to one month ago
- **1W**—Search the database from the most recent interaction back to one week ago
- **1D**—Search the database from the most recent interaction back to one day ago

The Interaction Type filters enable you to select and deselect the types of interactions that are to be searched. The items that are displayed depend on the interaction types that you are configured to handle. Click the **Filter** menu to select the interaction types that you want to search. You can select multiple items in the **Filter** menu. The following types are available, by default:

- Show all Interactions
- Show voice Interactions
- Show e-mail Interactions
- Show chat Interactions
- Show SMS Interactions
- Show Other Media Interactions

When a filter is on, a check mark appears next to it in the **Filter** menu.

Your administrator might have configured additional customized options for the **Filter** menu, such as business area/department (for example: accounts, sales, and service) or customer level (for example: Silver, Gold, and Platinum). Custom filters enable you to refine your search. For example, if you are looking for e-mail interactions about a service request, you can make two selections in the **Filter** menu to refine your search: **Show e-mail Interactions** and **Show Interactions with Service Department**.

Grid View and Tree View

Interaction Workspace enables you to view contact interactions either chronologically or as threads. The **Show Interactions in Grid View**/**Show Interactions in Tree View** button (/) enables you to specify how the Contact History panel is displayed.

Grid View displays interactions chronologically, and Tree View displays the interactions chronologically by thread. A thread is a group of two or more interactions with a single contact that were created in the same context (e-mail replies, multichannel conversation, social-media threads, and so on).

Both the Grid and Tree views have columns that contain information about each interaction. Depending on how your system is configured, columns might include **From**, **Subject**, **Status**, **Start Date**, **End Date**, or custom attributes that are assigned by your administrator. Depending on your system configuration, interaction status might include the following states:

- Done
- In-progress
- Assigned to <agent> in <name> workbin
- Assigned to <name> Place in <name> workbin
- In shared workbin <name>
- Assigned to <agent> Actively Handling
- Delivery in-progress
- In a queue

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 the 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.

Viewing Search Results

The search results are displayed in the interactions table. The search result table is not sortable. To sort the interactions table, clear the search field to display the full history set.

Actions

Interaction Workspace enables you to perform actions on interactions that you have selected in the interactions table. You must be configured to perform contact management by your system administrator.

Actions that you might be configured for include the following:

- Marking Done (voice interactions)
- Change Contact
- Replying/Replying All (e-mail interactions)

- Resending a previously sent e-mail
- Opening in-progress e-mail interactions

Completing Interactions

To complete a voice interaction, select it in the Interactions table, open the **More Actions** menu, and click **Mark Done**. The status of the interaction changes to **Done**.

Changing Contact

To assign a voice interaction with the status of In Progress to a different contact, select it in the Interactions table, and click Change Contact. In the Change Contact window, select a new contact and click **Merge**.

Reply or Reply All

Reply or Reply All to an e-mail interaction.

Resending a Previously Sent E-Mail

If you select an outbound e-mail interaction in the Contact History view that is in the **Done** state, the **Resend** button () is displayed if you are configured to resend outbound e-mails that have already been sent.

Click **Resend** to open the previous outbound e-mail interaction in a new outbound E-mail Interaction window. The contents of the previous e-mail interaction are copied into the body of your new e-mail interaction, and the recipients are copied into the recipient list of the outbound E-mail Interaction window.

Opening In-Progress E-Mail Interactions

If the status of an e-mail interaction in the Contact History view is in one of the in-progress states, when you select the interaction, the **Open** button () is displayed (if the e-mail is in a queue, a workbin, or in routing (including outbound in-progress e-mails). Click **Open** to open the e-mail interaction in the current active interaction window or in a new E-mail Interaction window if you are opening the e-mail from the Main Window or Gadget Contact History view.

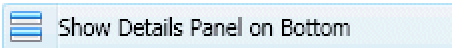
After you pull the in-progress e-mail interaction, you can read or handle it as an inbound e-mail interaction or an outbound e-mail interaction. You can also click **Put back in original location** () to return the e-mail interaction back to the In-Progress workbin or into a queue.

About the Selected Interaction

Interaction Workspace enables you to view information details about interactions that you have selected in the Contact History view. The **Show Details Panel on Bottom/Hide Details Panel** button () enables you to specify how the Details panel is displayed. Click the **Show Details**

Panel on Bottom/Hide Details Panel button to choose one of the following views:

- 

—Displays the Details panel to the right of the workspace area.
- 

—Displays the Details panel below the workspace area.
- 

—Hides the Details panel.

The Details panel contains the following three tabs:

- Details
- Note
- Case Data

Details

The **Details** tab might display information such as the following:

- Phone number
- To and from e-mail addresses
- Origin of the call—for example, the name of the agent who transferred the call (this information is stored in the Note tab)
- Time—Elapsed time between the interaction **connected event** and the **markdone** event by the agent or the system
- Timestamp
- Chat transcript
- Name of the contact

Note

The Note is a feature that enables you to enter comments about the current interaction or read comments that have been entered in the past. The comments are stored as a part of the history for the contact. The contents of the Note are available to any agent who views the contact's history.

Case Data

Case Data (attached data) provides information—such as an account number, type of service, and disposition—about an interaction. Your system administrator configures which attached data is displayed.