Workspace Desktop Edition Help

Contact Directory

12/13/2025

Contents

Contact Directory

[**Modified:** 8.5.112.08]

> ### Tip
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

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

- Manage contact information
- 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, in the Main Window click the **Access and use Workspace supporting views** button (☰) to display the **Supporting Views** menu, then select **Contact Directory**. The **Contact Directory** view is contained in a tab that opens below the Main Window.
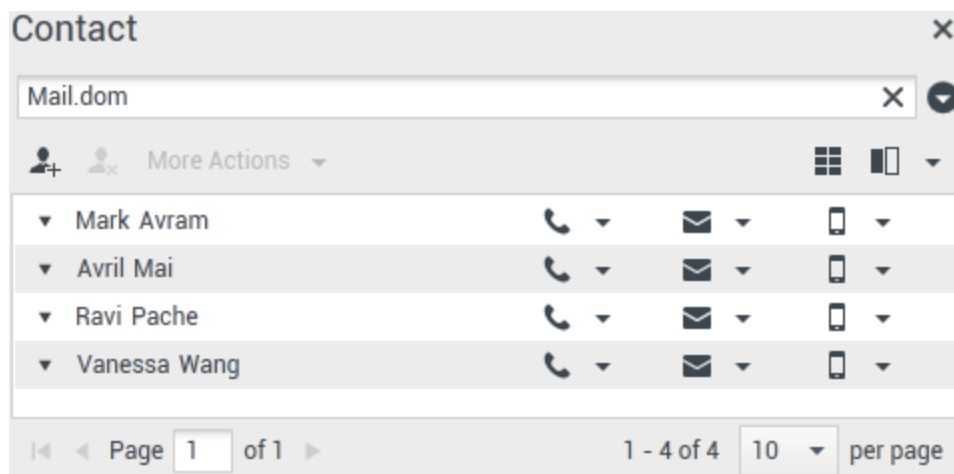
Contact Actions

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 email if there is an email address in the contact database
- Merge or unmerge the contact
- View contact information
- Edit contact information (you might not have this capability enabled)
- View contact history

To open the contact **Information** and **History** views, double-click a contact in the search results, list view, or grid view.

Finding Contacts

The search behavior is dependent on the search result-type that you select:

- 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.
- 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.

For each search type, 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.

To find interactions, use the Interaction Search view.

Quick Search

To search the contact directory, type the name, phone number, email address, or any contact attribute allowed by your Administrator for quick search, of a contact in the **Quick Search** field. The quick search function uses the *starts with* and *match any condition* criteria of the **Advanced Search** view applied to all the attributes allowed by your administrator in the scope of quick search. Please refer to the Grid and List results for information about each result type and the expected search behavior.

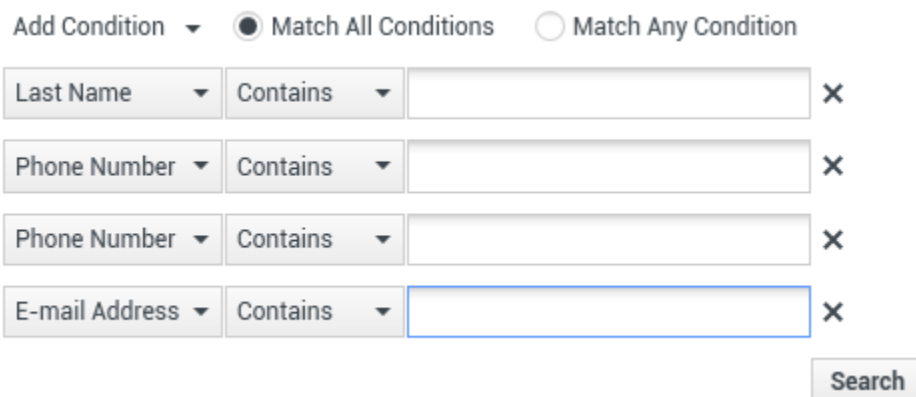Click the magnifying glass to search for the value that you have entered.

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

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

> ### Tip
>
> Genesys does not support *wildcard* characters in contact database searches.

Advanced Search

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

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clicking the **X** next to the option.

Select *Match All Conditions* if all the specified criteria must be matched or *Match Any Conditions* if only one matching criteria is enough.

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

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

Please refer to the descriptions of each result-type to get information about the expected search behavior.

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

> ### Tip
> Your administrator configures the default search criteria for this view; however, you can add or remove search criteria as needed. Workspace remembers the last search criteria that you used and displays these when you use the **Advanced Search** feature again. [**Added:** 8.5.112.08]

> ### Tip
> Genesys does not support *wildcard* characters in contact database searches

Search Results

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

The search behavior is determined by the search result-type that you select (see descriptions of the List View and Grid View results below).

> ### Tip
> In some contact centers, only one of the two views might be available. In this case, the **List** (▤) and **Grid** (▦) buttons are not displayed. (**Modified:** 8.5.105.12)
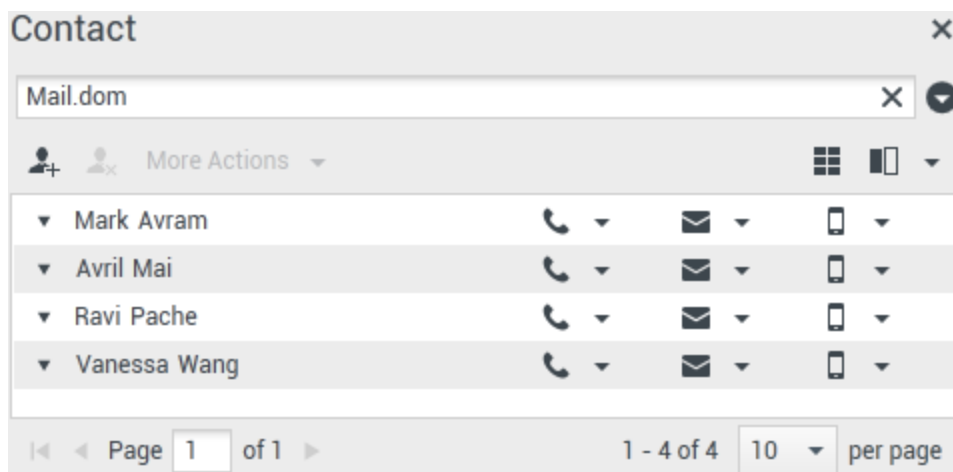
Use the **Show Contacts** View (⊞≣) button to toggle back and forth between the Grid and List views.

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.
- Click the **Go to Last 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 (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.

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*.

- Advanced search set to **Match all criteria *using the*** First Name' equals *Johnny* and **Address** `contains` *pero* will also match the 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.

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.
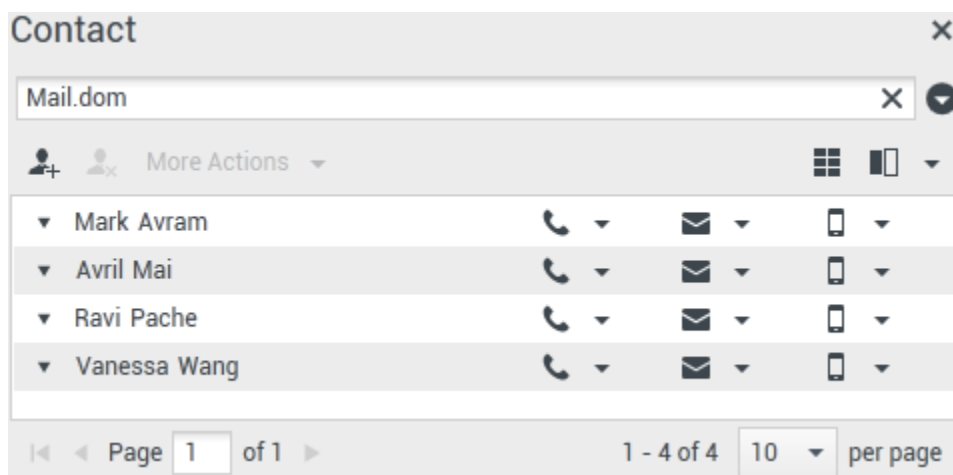
Grid View

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*

- Advanced search set to **Match all criteria** using **First Name** equals *Johnny* and **Address** starts with *2001, Junip* as the criteria will match a contact where **First Name** = *Johnny* and **Address** = *2001, Junipero Serra Blvd*.

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. 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 email 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
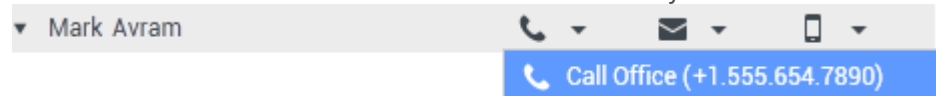
Action drop-down list.

- Click the **Call** icon (📞) to call the contact using the primary phone number associated with that contact. Click the **Call** icon drop-down list to select the number that you will use to call the contact. If you are sending an email, click the **E-Mail** icon.

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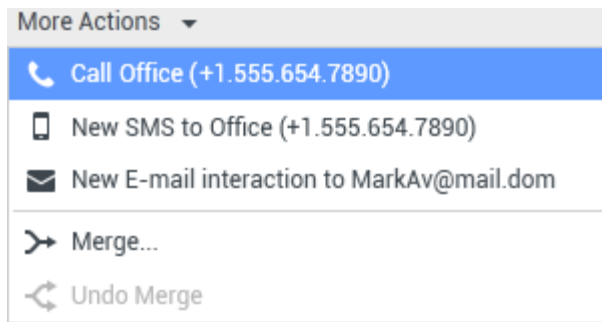
send an email message to the contact.

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

Add Contacts

If your account is configured to do so, you can add new contacts to the contact database by clicking the **Add Contact** button (![icon]) to launch the **Add Contact** view in the Contact Information tab.

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** button (⬛) to save the information in the contact database.

> ## Important
> (**Added:** 8.5.101.14) Once you create a contact, you might not have permissions to make further changes after clicking **Save**. In this scenario, a message box is displayed asking you to confirm that you want to save the information. Review the content carefully before clicking **Save**.

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

If you want to add additional phone numbers and email 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 email address as the *primary* contact number or address, click the **Primary** button next to the phone number or email address that you want to specify as the primary for the contact.

Phone Number

| 1.555.654.7890 | Office ▾ | ✕ | ⦿ Primary |
| 3317 | Mobile ▾ | ✕ | ○ |

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** button (👤✕).

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.
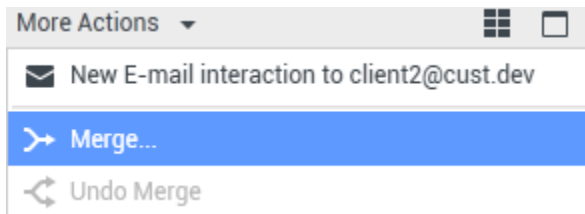
Merge Contacts

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

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.

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

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.

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

selecting the duplicate contact.

Unmerge Contacts

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

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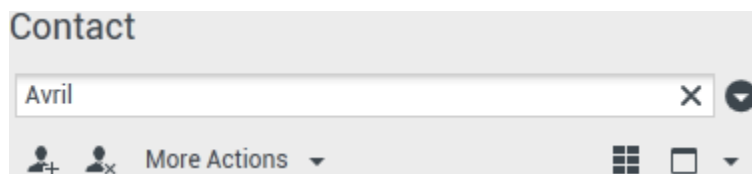
The **Contact Information** view enables you to view and, if you are configured to do so, edit information for the currently selected contact. You might also be configured to assign an unknown interaction to a contact in the contact database by using the Manual Contact Assignment feature.

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.

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 **Information** tab of the **Contact** view of an interaction, 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.

Select the contact from the result list and then click **Assign** 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.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Manage Contacts and Contact Information
- Manage Your History
- Manage Contact History

Related topics

- Contact History
- Manual and Automatic Contact Assignment

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