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Workspace Desktop Edition User's Guide

[Find Interactions](#)

5/7/2025

Find Interactions

[**Modified:** 8.5.116.10]

[**Added:** 8.5.104.15]

The **Interaction Search** view enables you to find interactions based on multiple criteria.

Workspace provides you with multiple ways to find interactions in your contact center interaction database. Refer to the **Contact and Interaction Management** topic for more information about finding contacts and interactions under the following conditions:

- You know which contact you are searching for (use the Contact Directory to find the interactions exchanged with that contact)
- You were the agent who handled the interaction (use the My History view to find the interactions that you have handled)

However, sometimes you must find an interaction, but you no longer remember who the contact was, or whether it was handled by yourself or another agent. The Workspace Interaction Search feature enables you to use the **Interaction Search** view to look for interactions based on one or more criteria, including words in the body or transcript of the interaction.


Lesson: Finding and viewing an interaction in the interaction database

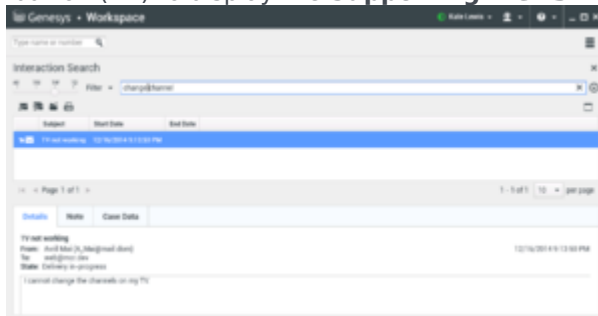
Purpose: To find and view or modify existing interactions in the interaction database.

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Workspace (see **Lesson: Logging in to Workspace**).

Start

1. To display the Interaction Search view, click the **Access and use Workspace supporting views** button () to display the **Supporting Views** menu, then select **Interaction Search**.



Interaction Search view

The Interaction Search view enables you to find interactions using one of two modes:

- **Quick Search**—Quick Search combines a subset of search criteria selected by your administrator. It typically applies a "starts with" for each word of the criteria in any of the attributes selected by your administrator.
- **Advanced Search**—The Advanced Search feature enables you to enter multiple criteria to refine your search. The Advanced Search pane contains drop-down lists of search criteria that enable you to build a complex search based on multiple criteria such as Status, Subject, processing agent, date or date range, and interaction text. Text field searches are based on a "Matches" search, where the request returns interactions that contain, for each typed word, at least one word starting with the specified word.

2. To perform a quick search of the Interaction Database, perform the following steps:

- a. If you know when the interaction for which you are searching was received, use the chronology slider to search the interaction history by time interval.

The slider has four positions that represent different time intervals:

- **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
- b. If you know the type of interaction, such as email, chat, or SMS, for which you are searching, you can refine your search by using the Interaction Type filter. 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:

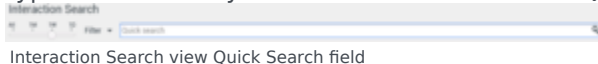
- Show all Interactions
- Show voice Interactions
- Show email Interactions
- Show chat Interactions
- Show SMS Interactions
- Show Other Media Interactions

When a filter is on, a check mark appears next to it in the **Filter** menu and the button remains highlighted if the "All" filter is not applied.

Tip

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 email interactions about a service request, you can make two selections in the **Filter** menu to refine your search: **Show email Interactions** and **Show Interactions with Service Department**.

- c. Type the text that you want to search for in the Quick Search field.



- d. Click the magnifying glass to search for the criteria that you have entered, or click the **X** to clear the Quick Search field.

If multiple pages are returned in the search results, 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

3. To perform an advanced search of the Interaction Database, perform the following steps:

- a. Click **Show Advanced Search** (🔍). The Advanced Search pane is displayed.



Interaction Search view Advanced Search pane

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.

Tip

The contents of the Advanced Search Pane are set up by your system administrator. There are many possibilities for how this view will appear to you and what criteria will be available. Your administrator might have created logical groups of criteria for you. In this case, the groups will be displayed in the **Add Condition** drop-down menu and in the main Advanced Search pane.

- b. Workspace enables you to view contact interactions either by attributes or as threads. Click the **Show Interactions in Grid View/Show Interactions in Tree View** button (📊/📋) to specify how the Interaction History panel is displayed. Grid View displays interactions by attribute and Tree View displays 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 (email replies, multichannel conversations, social-media threads, and so on). **[Added: 8.5.116.10]** The Grid view in newer environments displays a sortable list of all of the contacts in the contact database that match the search criteria.
- c. If you know the type of interaction, such as email, chat, or SMS, for which you are searching, you can refine your search by using the Interaction Type filter. 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 email 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 and the button remains highlighted if the "All" filter is not applied.

Tip

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 email interactions about a service request, you can make two selections in the **Filter** menu to refine your search: **Show email Interactions** and **Show Interactions with Service Department**.

- d. Use the **Add Condition** drop-down menu to add search criteria to the Advanced Search Pane. Remove criteria from consideration by clicking the **X** next to the option.



Interaction Search view Advanced Search pane showing three conditions

If your administrator has created groups for this view, you can add criteria by group to make it easier to manage the criteria. For example, your administrator might create the following groups and specified the following search criteria for each group:

- **Agent:** Processed By
- **Contact:** Bcc Address, Cc Address, Contact, From Address, From Personal Part, Phone Number, Reply-To Address, Sent Date, To Address
- **Dates:** Chat Established Date, Chat Released Date, Sent Date, Start Date, End Date
- **Interaction:** Subject, Contact, Interaction Id, Processed By, Interaction Sub-Type, Interaction Type
- **Other:** A group that is created automatically when your administrator creates one or more criteria groups. It contains all available search criteria that are not specified as members of other groups.

Next to the name of the group in the Advanced Search Pane is a **+**. Click the **+** to add more criteria from this group.

To add other search criteria or to display additional available groups, select them from the **Add Condition** menu. Remove criteria from consideration by clicking the **X** next to the option.

If you have date specific criteria available to you, you can use a calendar picker to specify a date. You can also type in a date manually. For example, 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.

Menus for date fields might contain the following choices:

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

- **Between**—Between the specified dates

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

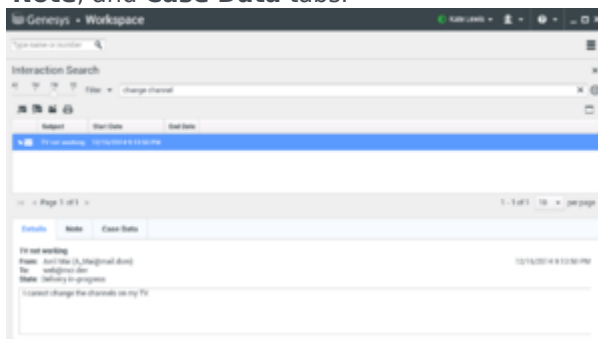
Text field searches are based on a **Matches** search where the request returns interactions that contain the at least one word starting with the specified typed text.

Business Attribute searches use a drop-down menu that enables you to select the exact value to match.

- e. Use the **Match Conditions** options to specify whether **All** or **Any** of the search conditions that you have specified are applied.
- f. Build up your search by adding criteria, then click **Search** to start your search based on the criteria that you have specified.

If multiple pages are returned in the search results, 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
4. Select a search result item to view information about it in the Details Panel, which includes the **Details**, **Note**, and **Case Data** tabs.



Interaction Search view showing results and a selection in the **Details** tab

If the Details Panel is not displayed, you can display it by clicking the **Show Details Panel on Bottom/Hide Details Panel** toggle button:



The **Details** tab displays interaction specific information. For example, if you have selected an email interaction, the Subject, From, To, State, and body of the email interactions are displayed.

The **Note** tab enables you to view notes that are associated with the selected interaction.

The **Case Data** tab enables you to view the case information for the selected interaction.

5. Different actions are available for a selected interaction in the Search Results pane, depending on the type of interaction that you have selected. For example, you might be able to reply to the interaction, open the interaction, print the interaction, mark in-progress voice and email [**Added:** 8.5.110.13] interactions as Done, and delete In-Progress outbound email interactions [**Added:** 8.5.110.13]. Click an

action button to perform an action on the selected interaction.

END

Related Information

- [Interaction Search](#)
- [My History](#)
- [Contact History](#)
- [Contact Directory](#)
- [Contact Search](#)