Agent Workspace Agent's Guide

Contacts and interactions

2/1/2026

Contents

- Agent

- Supervisor

A contact is a person that your company does business with. Your company has information about that person that you can manage and use to do your job. An interaction is a communication with the contact over one or more channels, such as Voice or Digital, such as Chat or Email, and the tools that help you address the contact's needs and the needs of your company. Agent Workspace provides tools that you can use to manage previous interactions with a contact (the contact's interaction history, your History, and your company's interaction database).

Related documentation:
-

Important

Due to continual changes to Agent Workspace, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you can access in the product when you use it.

How do I search through previous interactions with customers?

You can access customer interactions in the Contact Directory and in the **History** tab of an active interaction.

You can access customer interactions in three ways:

- The My History view lets you browse your interactions.

- The Contact Directory view lets you browse all interactions with a customer or team member.

- The Interaction Search view lets you browse the complete interaction database using either a Quick Search or an Advanced Search.

Contact management videos

The following videos introduce you to some of the basics of contact and interaction management, but be sure to click the links on this page to read about contact and interaction management in detail.

Managing Contacts

Overview of the Contact Directory

Link to video

Finding Interactions

Agent Workspace provides three different tabs in the **Connect** group that you can use to find interactions in the Interaction Database:

- **My History**: Search for interactions that you have worked on.
- **Interaction Search**: Search for interactions that anyone has worked on.
- **Contact History**: Search for interactions of a particular contact.

My History

Basic My History search

Link to video

Advanced My History search

Link to video

Interaction Search

Basic Interaction history search

Link to video

Advanced interaction history search

Link to video

Contact History

Basic Contact history search

Link to video

Advanced Contact history search

Link to video

Opening Completed and in Universal Queue interactions

In environments where Genesys Intelligent Workload Distribution is used, your account might be configured to enable you to open interactions that have already been completed (marked **Done**) or

are In Progress but are still in the Universal Queue. This capability might be restricted to certain media types, such as Workitems or Email.

If this capability is enabled, you can open **In Progress** (**In Universal Queue**) interactions and re-open **Done** (**Completed**) interactions in the following views:

- Contact History (in the **History** tab of an interaction)
- My History
- Interaction Search

In the image below, an agent selects a Workitem interaction in the **Interaction Search** tab. The Status of the interaction is **In Progress**. The **Details** tab displays information about this Workitem, including the **State** property. In this example, the state is **In Universal Queue**.
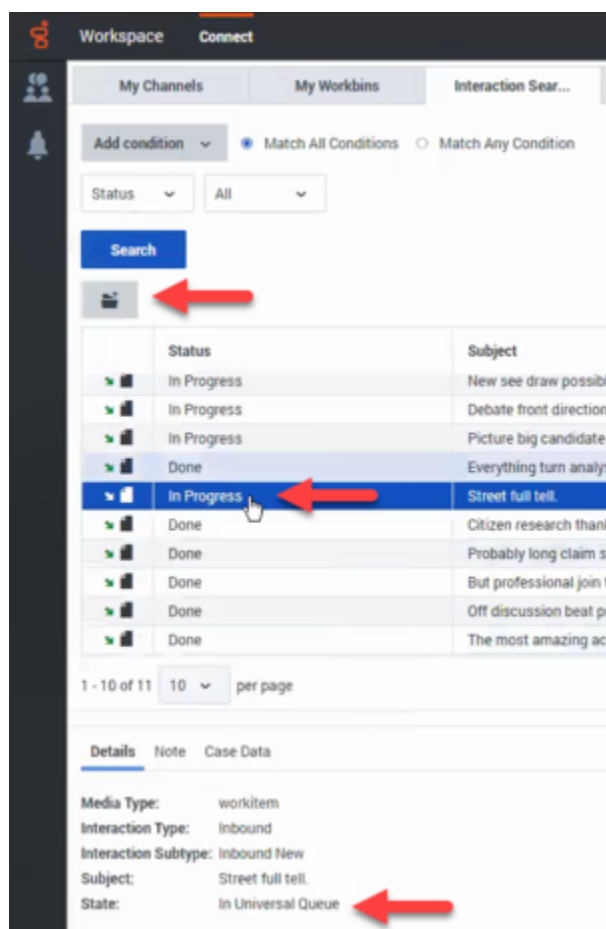
If the agent opens the interaction, it can be saved in the agent's personal workbin. The state is updated to **Assigned to - in workbin**.

In the image below, an agent selects a Workitem interaction in the **Interaction Search** tab. The Status of the interaction is **Done**. The **Details** tab displays information about this Workitem, including the **State** property. In this example, the state is **Completed**.
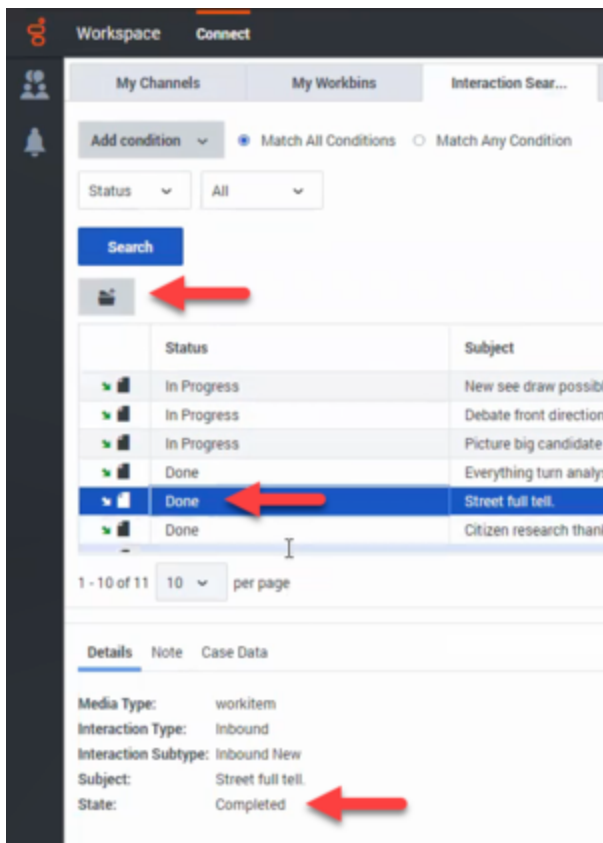
If the agent re-opens the interaction, the agent can saved the interaction in their personal workbin. The state is updated to **Assigned to - in workbin**.

Finding interactions related to the current interaction

When the *Open Interactions In Universal Queue* and *Re-Open Completed Interactions* functionality is enabled, you can find and open or re-open interactions related to the contact of your current interaction. Use the **History** tab in the **Contact** tab of an active interaction to find related interactions. For example, you might be handling an Email interaction and need to find and attach a Workitem with the **In Progress** or **Done** status and attach it to the Email interaction.

In the image below, an agent selects a Workitem interaction in the **History** tab of the current interaction. The Status of the interaction is **Done**. The **Details** tab displays information about this Workitem, including the **State** property. In this example, the state is **Completed**. The agent can click **Re-Open** to attach the workitem to the current Email interaction.
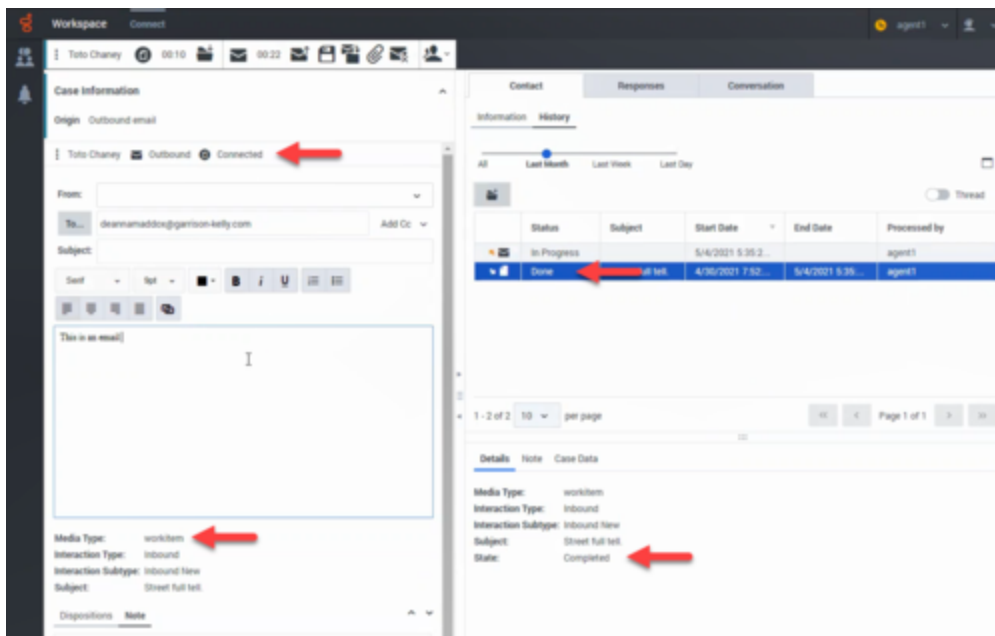
What next?

- Calls
- Chat
- Email
- Contacts
- Contact and interaction history

Top 5 topics

1. Getting Started
2. Navigating Agent Workspace
3. Calls
4. Contacts
5. Contact and interaction history