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Agent Workspace Agent's Guide

Contacts and interactions

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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:

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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

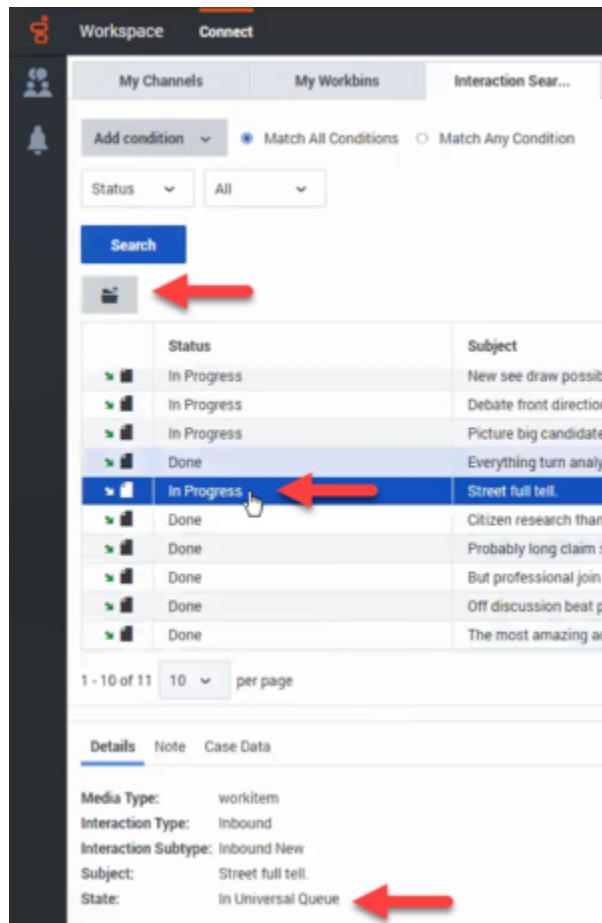
In environments where Genesys Intelligent Workload Distribution is used, your account might be configured to enable you to open interactions that have already been completed (marked **Done**) or

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**.



The screenshot shows the Agent Workspace interface. The top navigation bar includes 'Workspace' and 'Connect' tabs, and a 'My Channels' button. Below the navigation is a search bar with 'Add condition' dropdowns for 'Status' and 'All', and a 'Match All Conditions' radio button. The main area is the 'Interaction Search' tab, which displays a list of interactions. A red arrow points to the 'Status' column of the first interaction, which is 'In Progress'. Another red arrow points to the 'State' field in the 'Details' tab at the bottom, which is 'In Universal Queue'. The search results table has columns for Status, Subject, and State.

Status	Subject	State
In Progress	New see draw possibl	
In Progress	Debate front direction	
In Progress	Picture big candidate	
Done	Everything turn analy	
In Progress	Street full tell.	In Universal Queue
Done	Citizen research thank	
Done	Probably long claim si	
Done	But professional join t	
Done	Off discussion beat pi	
Done	The most amazing ac	

Details Note Case Data

Media Type: workitem
Interaction Type: Inbound
Interaction Subtype: Inbound New
Subject: Street full tell.
State: 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**.

The screenshot shows the Agent Workspace interface. At the top, there are navigation tabs: 'Workspace' (selected) and 'Connect'. Below the tabs are buttons for 'My Channels', 'My Workbins', and 'Interaction Sear...'. A search bar with a 'Search' button is present. A red arrow points to the 'My Workbins' button. The main area displays a list of interactions. One interaction is highlighted with a blue background and a red arrow pointing to it. The list includes the following rows:

Status	Subject
In Progress	New see draw possibl
In Progress	Debate front direction
In Progress	Picture big candidate
Done	Everything turn analys
Done	Street full tell.
Done	Citizen research thank

Below the list, there are pagination controls: '1 - 10 of 11' and '10 per page'. The 'Details' tab is selected, showing the following information:

Media Type:	workitem
Interaction Type:	Inbound
Interaction Subtype:	Inbound New
Subject:	Street full tell.
State:	Completed

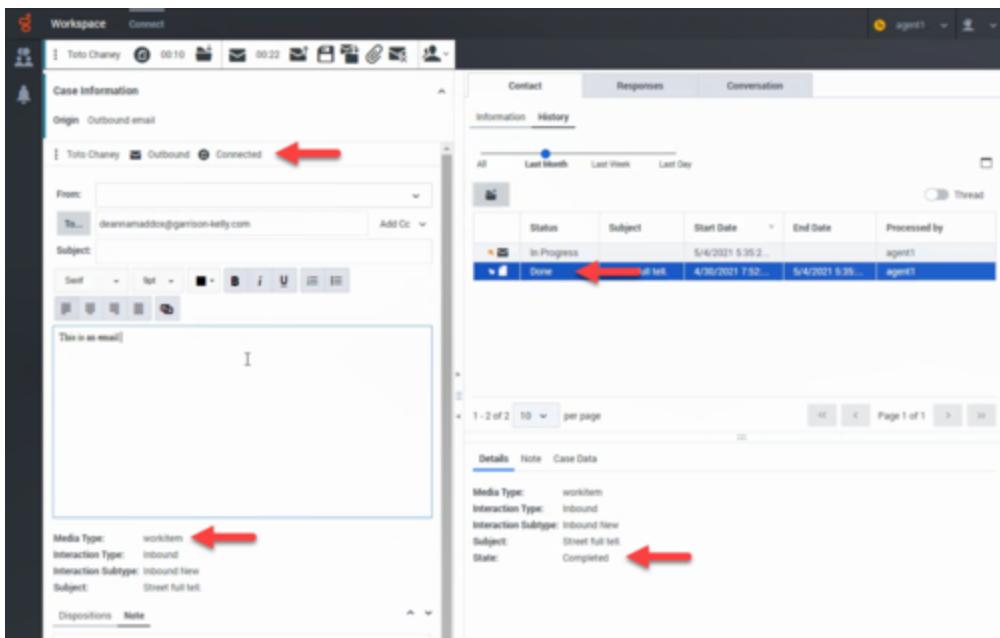
A red arrow points to the 'Completed' value in the 'State' column.

If the agent re-opens the interaction, the agent can save 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