Manage your Contact Center in Agent Setup

Contacts

2/12/2026

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- Administrator

Configure contacts in Agent Workspace so agents can manage their own list of contacts and contact history.

Related documentation:
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Agent Desktop ⌄

Desktop Options ⌃

Channels
Standard Response
Statistics
Global Login
Supervisor
Voice
Chat
Email
Outbound
Recording
Contact
Interaction History Advanced
Search
Standard Response Library
Genesys Softphone
Feedback
My Channels
Service Client

Digital Management ⌄

Single Sign On ⌄

Desktop Statistics ⌄

Templates ⌄

Gplus Salesforce ⌄

Voicemail ⌄

Services Options ⌄

Routing Manager ⌄

Recording Management ⌄

Contact

☑ Contact

☑ UCS for Voice

☐ Assign Contact

☑ Save Contact

☑ Delete Contact

☐ Use Contact History

☑ Contact History Displayed Columns | Status, Subject, Start Date, End Date

☐ Search Contact History

☑ Contact History Search Attributes | Subject

☐ Use My History

☑ Contact My History Displayed Columns | Status, Subject, Start Date, End Date

☐ Search My History

☑ Contact My History Search Attributes | Subject

☐ Open from History

☐ Contact can Forward email from History

☑ Use Directory

☑ Contact Notepad

☑ Use Contact History Notepad

☑ Allow Contact Interactions to be Open from Queue

☑ Allow Contact Interactions to be Open from Personal Workbins

☐ Allow Contact Interactions Workflow State

☐ Allow Tree View for Threaded Interactions

☑ Tree View - Contact History Displayed Columns | From Address, Subject, Start Date, End Date, Status

☑ Tree View - My History Displayed Columns | From Address, Subject, Start Date, End Date, Status

☑ Tree View - All Interactions Displayed Columns | From Address, Subject, Start Date, End Date, Status

☐ Allow Check for Duplicate Contact

☐ List of Contact Attributes for AND rule | None

☑ List of Contact Attributes for OR rule | PhoneNumber, EmailAddress

Cancel   Save

In the **Contact** section of the **Contact Center Settings** tab, you can enable the following options:

- **Contact** enables agents to access contact features.

- **UCS for Voice** enables the Universal Contact Server to generate voice interaction history in Agent Workspace. This option is enabled when the **Contact** and **Voice** check boxes are selected.

- **Assign Contact** enables agents to assign contacts to an interaction. This option is enabled when the **Contact** check box is selected.

- **Save Contact** enables agents to modify contacts.

- **Delete Contact** enables agents to delete contacts.

- **Use Contact History** enables agents to access contact history. This option is enabled when the **Contact** check box is selected.

- **Contact History Display Columns** allows you to manage the interaction attributes you want to display in the **Contact History** view in Agent Workspace. This option is enabled when the **Contact** and **Use Contact History** check boxes are selected.

- **Search Contact History** enables agents to search contact history. This option is enabled when the **Contact** and **Use Contact History** check boxes are selected.

- **Contact History Search Attributes** allows you to manage the interaction attributes you want to display in the **Contact History Quick Search** view in Agent Workspace. This option is enabled when the **Contact**, **Use Contact History**, and **Search Contact History** check boxes are selected.

- **Use My History** enables agents to access their own contact history. This option is enabled when the **Contact** check box is selected.

- **Contact My History Displayed Columns** allows you to manage the interaction attributes you want to display in the **My History** view in Agent Workspace. This option is enabled when the **Contact** and **Use My History** check boxes are selected.

- **Search My History** enables agents to search their own contact history. This option is enabled when the **Contact** check box is selected.

- **Contact My History Search Attributes** allows you to manage the interaction attributes you want to display in the **My History Quick Search** view in Agent Workspace. This option is enabled when the **Contact**, **Search My History**, and **Search My History** check boxes are selected.

- **Open from History** allows agents to open in-progress emails from the interaction history. This option is enabled when the **Contact** and **Email** check boxes are selected.

- **Use Directory** enables agents to view and search the contact directory. This option is enabled when the **Contact** check box is selected.

- **Contact Directory View** specifies the format for the Contact History View. Options include **List View** or **Grid View**. This option is enabled when the **Contact** check box is selected.

- **Contact Notepad** allows an agent to display and edit notes while handling an interaction. The notepad is a feature that enables agents to enter comments about the current interaction or about a selected interaction. Agents can view the note in most channels as well as contact history, My History, and My Workbin.

- **Use Contact History Notepad** allows an agent to see notes about interactions in Contact History.

- **Allow Contact Interactions to be Open from Queue** enables agents to open in-progress interactions from their workbin history.

- **Allow Contact Interactions to be Open from Personal Workbins** enables agents to open in-progress interactions that are in another agent's workbin history.

- **Allow Contact Interactions Workflow State** enables the use of the interaction workflow state in an interaction's details.

- **Allow Tree View for Threaded Interactions** enables agents to swap the interaction display format from grid view to tree view and inversely.

- **Tree View - Contact History Displayed Columns** specifies the list of interaction fields that are displayed in the Contact History screen for tree view.

- **Tree View - My History Displayed Columns** specifies the list of interaction fields that are displayed in the My History screen for tree view.

- **Tree View - All Interactions Displayed Columns** specifies the list of interaction fields that are displayed in the Interaction Search screen for tree view.

- **Allow Check for Duplicate Contact** enables workspace to alert agents when creating a duplicate contact. This option can be overridden by a routing strategy as described in the Configuration Guide.

- **List of Contact Attributes for AND rule** specifies the list of contact attributes, each of which are added as an AND clause in the search query to retrieve potential duplicate contacts from UCS during contact creation in Workspace.

- **List of Contact Attributes for OR rule** specifies the list of contact attributes, each of which are added as an OR clause in the search query to retrieve potential duplicate contacts from UCS during contact creation in Workspace.