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Manage your Contact Center in Agent Setup

Interaction history advanced search



- Administrator

Configure search for interaction history so agents can find previous interactions in Agent Workspace.

Related documentation:

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The screenshot shows the 'Interaction History Advanced Search' configuration page. On the left is a sidebar menu with 'Agent Desktop' and 'Desktop Options' expanded. The 'Desktop Options' menu includes: Channels, Standard Response, Desktop Views, Statistics, Global Login, Supervisor, Voice, Chat, Email, Outbound, Workitem, Facebook, Twitter, Recording, Contact, Interaction History Advanced Search (highlighted), Standard Response Library, Genesys Softphone, Feedback, My Channels, and Service Client. The main content area is titled 'Interaction History Advanced Search' and contains several configuration options:

- ☐ Can Search all Interactions
- ☐ Can Advanced Search all Interactions
- ☐ Can Filter all Interactions
- ☒ All Interactions Quick Search Attributes (dropdown: Subject)
- ☒ History Search Attributes (dropdown: Subject, Start Date, End Date, Status)
- ☒ Date Search Types (dropdown: On, OnOrAfter, Before, Between)
- ☒ All Interactions Displayed Columns (dropdown: Subject, Start Date, End Date, Status)
- ☐ Allow Unanswered Outbound Call

A search bar with the placeholder 'Search options...' is located at the top right of the main content area.

In the **Interaction History Advanced Search** section, you can configure the following options:

- **Can Search all Interactions** allows an agent to search among all interactions.
- **Can Advanced Search all Interactions** allows an agent to conduct an advanced search among all interactions.
- **Can Filter all Interactions** allows an agent to filter all interactions.
- **All Interactions Quick Search Attributes** specifies the interaction attributes used to search interactions in quick search mode of the Interaction Search view.
- **History Search Attributes** specifies the list of interaction attributes an agent can use in the Advanced Search mode of the Contact History, My History and Interaction Search views.
Search attributes include Subject, Start/End Date, Status, Contact, From Address, Phone Number,

Released Date, Sent Date, Notes, and Interaction Type.

- **Date Search Types** specifies the search types available to search the contact database by date. Types include On, On or After, Before, and Between.
- **All Interactions Displayed Columns** specifies the interaction attributes displayed in the result list of the Interaction Search view.
- **Allow Unanswered Outbound Call** specifies an interaction is created in the Universal Contact Server database, even if the outbound call is unanswered by the customer.