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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. Under 'Desktop Options', 'Interaction History Advanced Search' is selected. The main content area has a title 'Interaction History Advanced Search' and a search bar 'Search options...'. Below the title are 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

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.