Manage your Contact Center in Agent Setup

Transactions

7/13/2025

Contents

- Administrator

Manage business attribute overrides that are applied at a transactional level, such as a call or a chat.

Related documentation:

> **Important**
>
> Agent Setup only supports Transaction List objects.

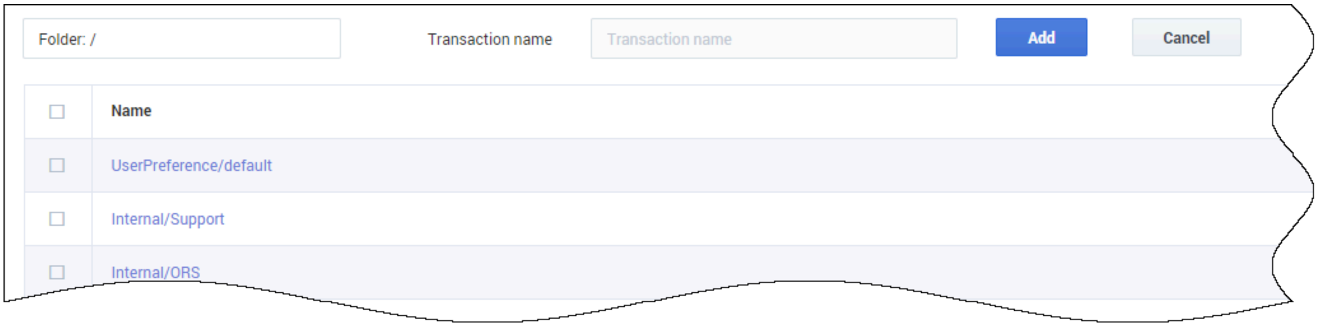
You can configure the following business attributes at the transaction level:

- Dispositions
- Case Data
- Toast Data
- Caller IDs
- Favorites

Select **Transactions** in the navigation menu to access the **Transactions** page. The **Transactions** main view lists the transactions only by name. Click the link for the transaction to view the details.

Use the following procedures to create and configure transactions.

Adding a new transaction



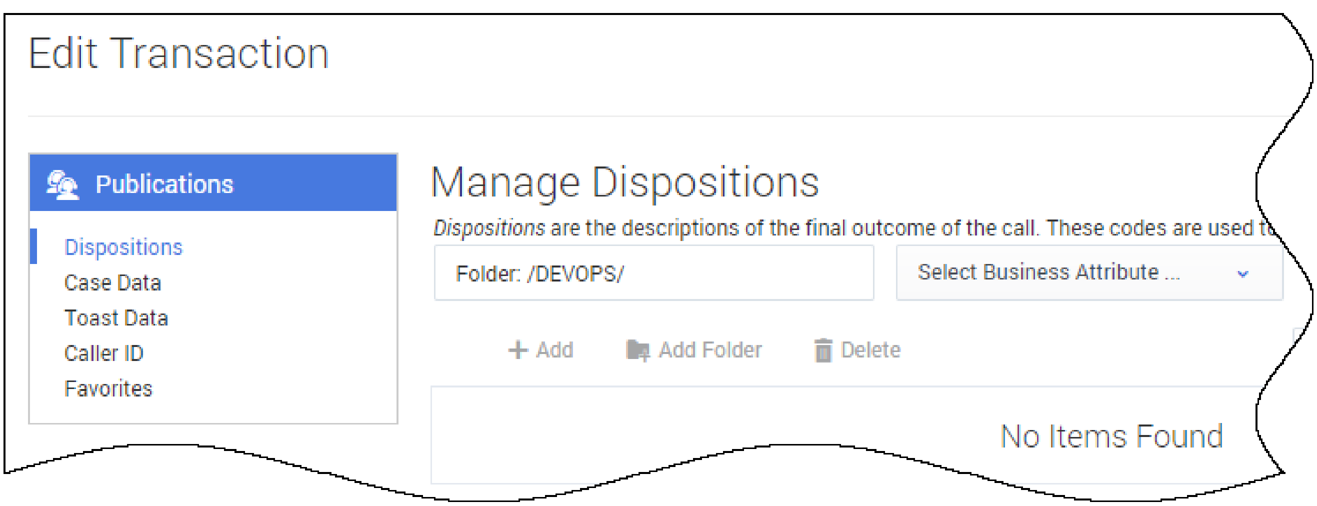
Click the **New Transaction** button, type a unique name in the **Transaction name** field, select a folder to store the transaction configuration, and then click **Add**. If you do not select a folder, the transaction is stored in the `/default` directory.

The name of the transaction is prefixed with the name of the folder. For example, `UserPreference/`. At this point, configuration is not complete. You need to add business attributes to the transaction.

Tip

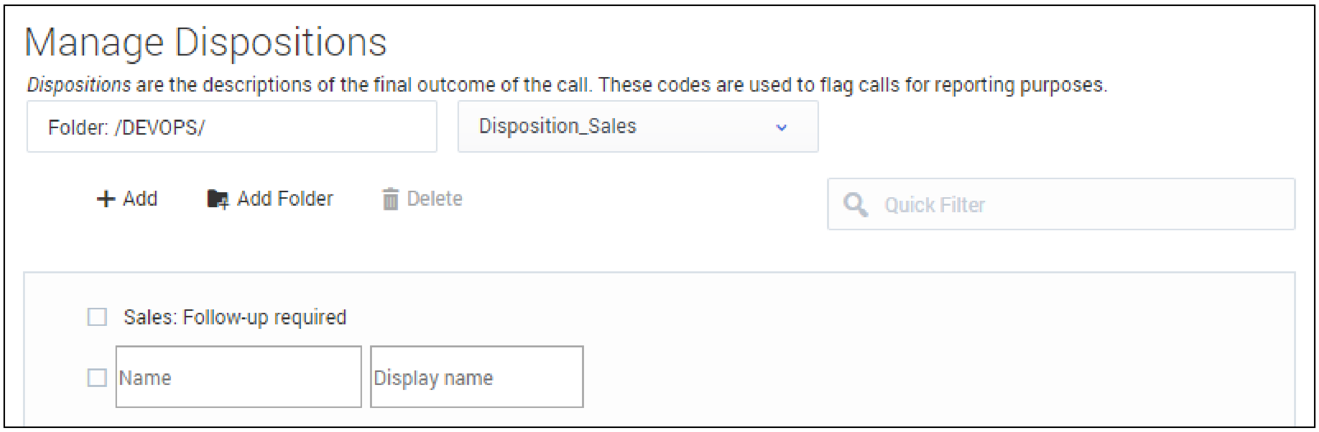
You can manage folders from this page. When you select the **Folder** option, a drop-down list box is displayed where you can select a folder or click the add folder icon  to create a new folder.

Adding business attributes to a transaction



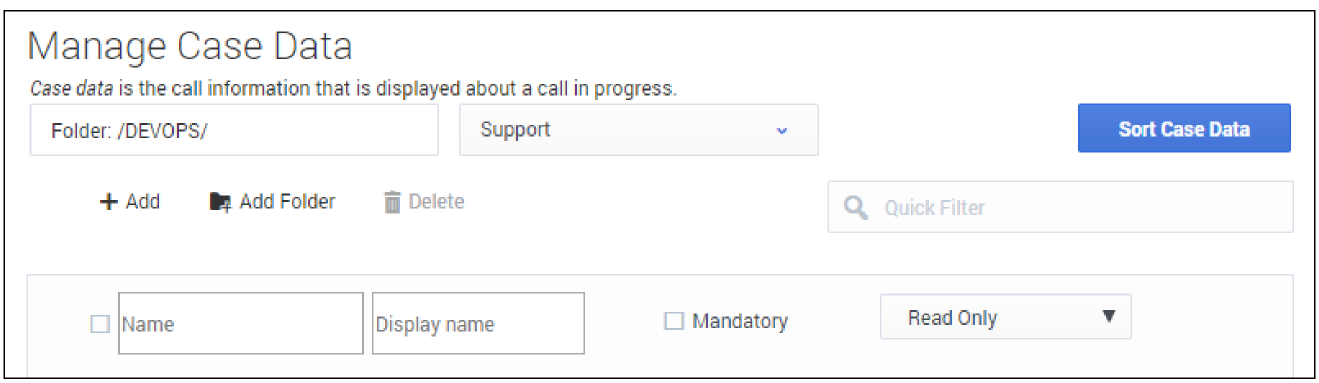
To edit a transaction, click the link in the **Name** column. If the transaction has no configured business attributes, as is the case when you add a new transaction, you are prompted to complete the configuration. Follow the prompts to add **Dispositions**, **Case Data**, **Toast Data**, **Caller ID**, and **Favorites** business attributes. After you add the business attributes, you can define them.

Managing dispositions



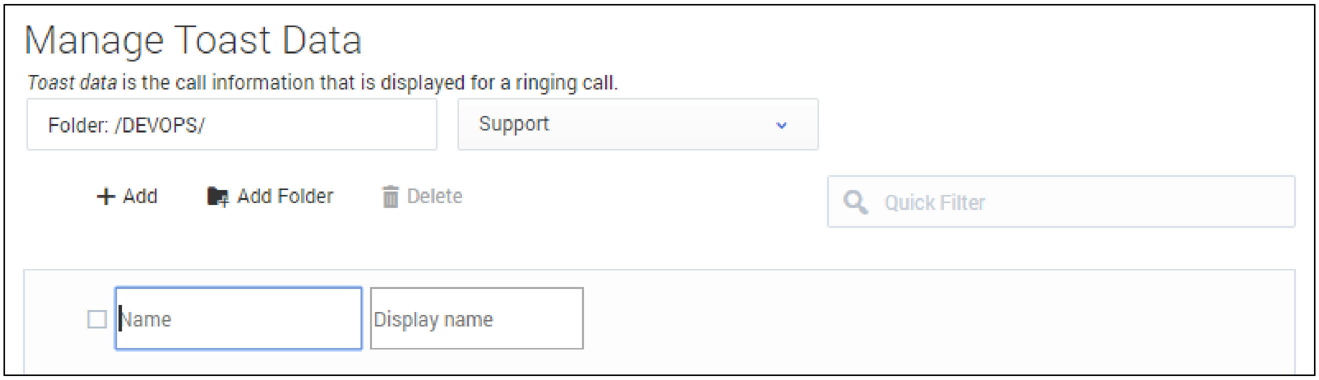
Dispositions are the descriptions of the final outcome of the call. These codes are used to flag calls for reporting purposes. To learn more about how to manage dispositions, see Dispositions.

Managing case data



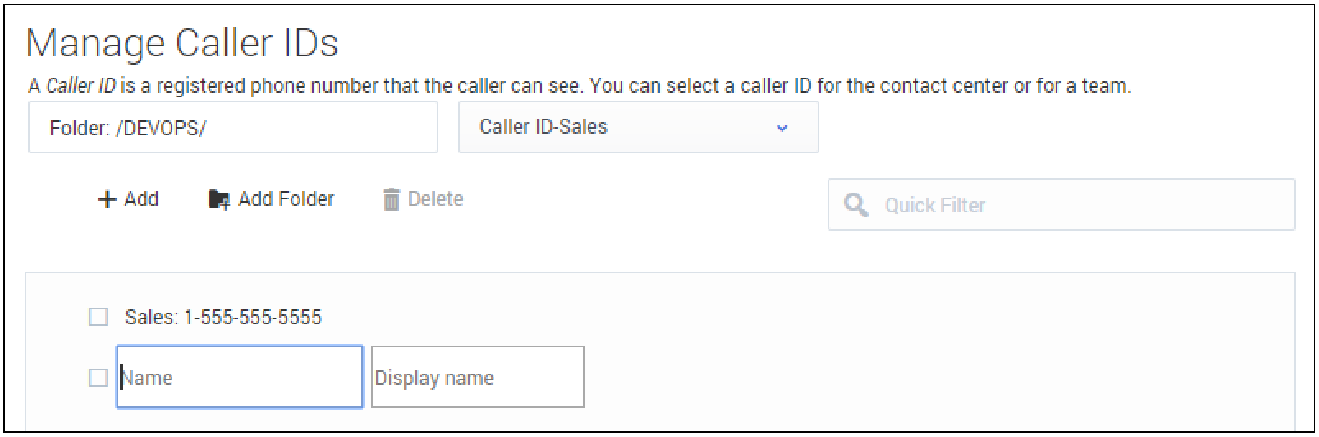
On the Manage Case Data screen, you can specify the information to be displayed to the agent when an interaction is transferred to them. To learn more about how to manage case data, see Case and toast data.

Managing toast data



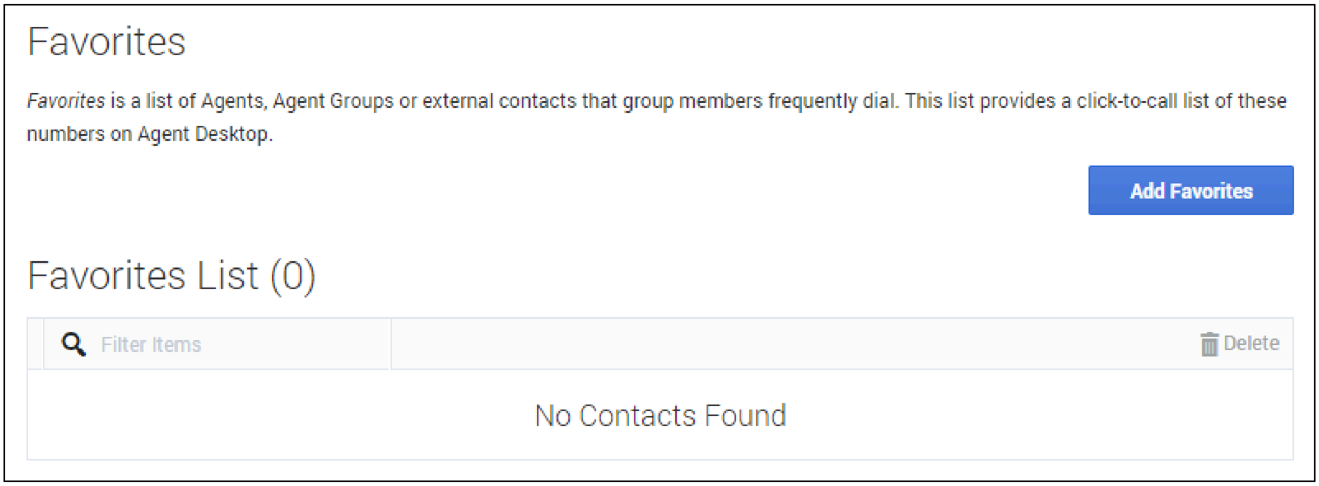
On the Manage Toast Data screen, you can specify the information to be displayed to the agent when they receive a call, chat, or other interaction. To learn more about how to manage toast data, see Case and toast data.

Managing caller IDs



You can allow agents to select from a predefined list of caller IDs. The selected caller ID is then displayed to the person receiving the call when the agent consults, conferences, or transfers a call. To learn more about how to manage caller IDs, see Add and manage Caller ID.

Managing favorites



On the **Favorites** screen, you can create a list of agents, agent groups, or external contacts that agent group members frequently dial. This list provides a click-to-call list of these numbers on Agent Workspace. To learn more about how to manage favorites, see Global Favorites.

What should a configured transaction look like?

In this example, the transaction includes the following business attributes:

Dispositions:

- Transaction complete
- Needs follow-up

Case Data

- First name
- Last name
- Subject

Caller IDs

- ABC Customer Support
- ABC Shipping

Use Case

In Agent Workspace, you have the ability to override desktop options by setting the value of a KVP to the name of a transaction list object. The desktop option is `interaction.override-option-key`. In the inbound or outbound routing application, you set the value of the identified key to the name of the transaction list object and the desktop options in the transaction list object are used instead of the Agent Workspace application or agent group objects.