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eServices Administrator's Guide

Customize Contact Identification per Media Type

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You can control how contacts are identified for interactions of a specific media type (of course, the interactions must have a valid media type specified in their user data).

1. In Configuration Manager, open the `Properties` window for the desired media type and go to its `Annex` tab.
2. Create a `contact-searchable-attributes` section.
3. In this section, create an option for each contact attribute that you want UCS to use in contact identification for this media type.

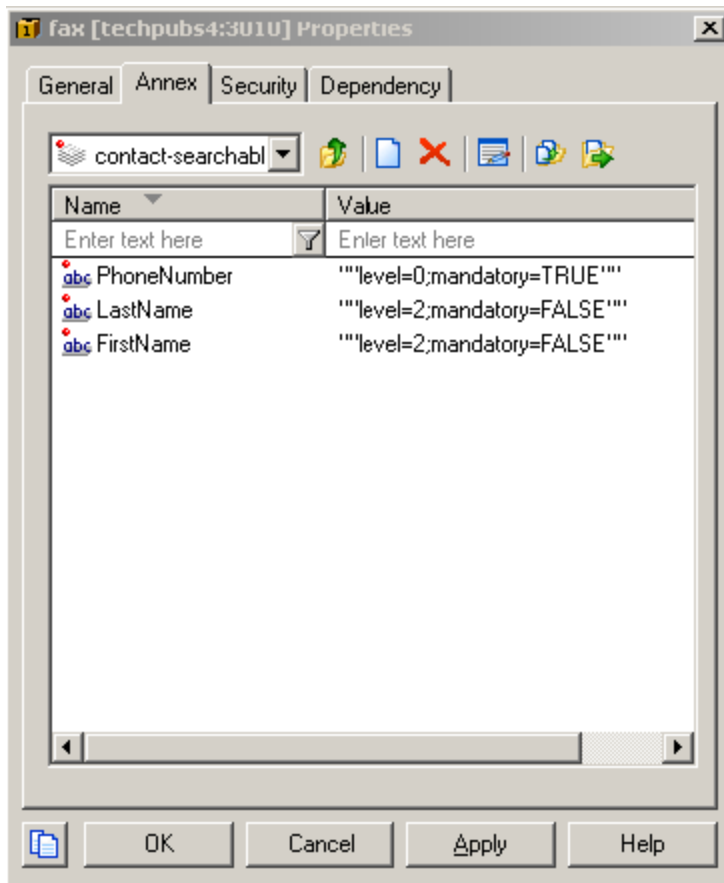
Important

Any such attribute must either be one on the `default list` or have the `is-searchable` option with a value of `TRUE`.

The options that you create must have the following characteristics:

- The name duplicates the attribute's system name (displayed in the `Name` box of the `Properties` window, not the `Display Name` box); for example, `PhoneNumber` rather than `Phone Number`.
- The value has the form `"level=<integer>;mandatory=<Boolean>"`, where
 - `<integer>` is an integer from 0-127 setting the attribute's priority.
 - If `<Boolean>` is `TRUE`, this attribute must be present (that is, it must have a value) for matching to occur.
 - If `<Boolean>` is `FALSE`, this attribute need not be present (that is, it may lack a value) for matching to occur.

The following figure shows an example.



Media Type Configured for Contact Identification

With the configuration in the preceding figure,

- UCS returns an error if no `PhoneNumber` value is present. It does this even if `FirstName` and `LastName` values are available, because `PhoneNumber` is the attribute with highest priority (0) and is defined as mandatory.
- If multiple matching records are found with a given `PhoneNumber` value, UCS uses `FirstName` and `LastName` together to discriminate because they have the same priority (2).
- If there is no `LastName` value, UCS does not use `FirstName` alone, because `LastName` is specified as mandatory in this level. Instead, the list of records matching `PhoneNumber` only is returned. This avoids identification based on `FirstName` only.