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eServices Administrator's Guide

Contact Creation

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Contact Creation

If UCS cannot find a contact in its database that matches the contact associated with a new interaction, it creates one in its database.

Default Behavior

The default behavior is for UCS to simply create a new contact record. This behavior can be overridden for an interaction in a routing strategy using the IRD `Identify Contact` object (see Universal Routing 8.1 Interaction Routing Designer Help). For e-mail interactions only, you can also modify the default behavior by using one of the non-default settings of E-mail Server's `contact-identification` option (see the eServices 8.1 Reference Manual).

Turning contact creation on and off

You can customize the default behavior for each media type.

1. In Configuration Manager, go to `Business Attributes > Media Type > Attribute Values` and double click the media type that you want to adjust.

2. On the `Annex` tab of the resulting `Properties` window (to set Configuration Manager to show the `Annex` tab, see `Configuration Manager Help`), create a `settings` section if it does not already exist.

3. In the `settings` section, create an option called `create-contact`. Set its value to `FALSE` to block contact creation for this media type. (The default value is `TRUE`).

Setting minimum attributes for creation

You can also define a minimum set of contact attributes that must be present (must have values) for a contact to be created.

1. In Configuration Manager, open the `Properties` window for the desired media type and go to its `Annex` tab.

2. Create a `contact-minimum-attributes-set` section.

3. In this section, create an option for each contact attribute that you want to require for contact creation. The option's name must duplicate the attribute's database name (displayed in the `Name` box of the `Properties` window, not the `Display Name` box); for example, `PhoneNumber` rather than `Phone Number`. The option's value must be empty.