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Web Services and Applications Configuration Guide

Enabling the Interactions Search view

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Enabling the Interactions Search view

In Workspace Web Edition, you can enable the **Interactions Search** view. When enabled, the agent can select **Interactions Search** from the main menu and then use a variety of advanced search controls to locate the interactions that they want to view. The search returns a maximum of 100 results.

Start

1. Activate the **Interaction Search** view. See `privilege.contact.can-search-all-interactions`.
2. Enable advanced searching. See `privilege.contact.can-advanced-search-all-interactions`.
3. Enable the filtering of interactions. See `privilege.contact.can-filter-all-interactions`.
4. Define the list of attributes that the agent can select in the **Quick Search** view. See `contact.all-interactions-quick-search-attributes`.
5. Define the list of attributes that the agent can select in the **Advanced Search** view. See `contact.history-search-attributes`.
6. Define the list of search types that the agent can use to define a date range for the search. See `contact.date-search-types`.
7. Define the columns displayed in the returned search results. See `contact.all-interactions-displayed-columns`.
8. Specify which interaction types (channels) are included in the **Interaction Search** view list of interactions. See `contact.history.media-filters`.

End

Advanced Search

The standard search enables you to search for interactions by status, subject, start date, end date, contact first name, and contact last name. You can expand the capabilities of the advanced search by enabling agents to search for interactions based on the attributes listed in the **Searchable Attributes** table. You specify these criteria by using the `contact.history-search-attributes` option.

Searchable attributes

Attribute Name	Attribute Display Name	Comments
BccAddresses	Bcc Address	All types of email addresses
CcAddresses	Cc Address	All types of email addresses
ContactId	Contact	Name of a contact (Team Communicator is presented to select the contact)
EndDate	End Date	Date
EstablishedDate	Established Date	Date

Attribute Name	Attribute Display Name	Comments
FromAddress	From Address	
FromPersonal	From Personal Part	
Id	Interaction ID	
Mailbox	Source mailbox	
OwnerId	Processed By	Name of the agent. Team communicator is presented to select the agent
PhoneNumber	Phone Number	
ReleasedDate	Released Date	
ReplyToAddress	Reply-To Address	
SentDate	Sent Date	
StartDate	Start Date	
Status	Status	To be selected among: All, InProgress, Done
Subject	Subject	
SubtypeId	Interaction Sub-Type	
Text	Interaction Text	Search in the body of the interaction (email (PlainText or HTML), chat (transcript)).
TheComment	Notes	Contains the note associated with the interaction
ToAddresses	To Address	
TypeId	Interaction Type	

Case Sensitivity

Search is case insensitive. TEST, tEST, test, and teST are all considered identical.

Phrase Search

Searches are *Starts With* searches unless quotation marks are used. When quotation marks are used, Workspace employs an *Exact* search.

If an agent encloses a phrase in quotation marks, search results return only matches for the exact phrase.

Without quotation marks around a phrase, each word is searched for independently, and results are returned for all interactions that contain *all the strings* that start with the specified words. If not all of the phrase strings are found in an interaction, it will not be included in the search results.

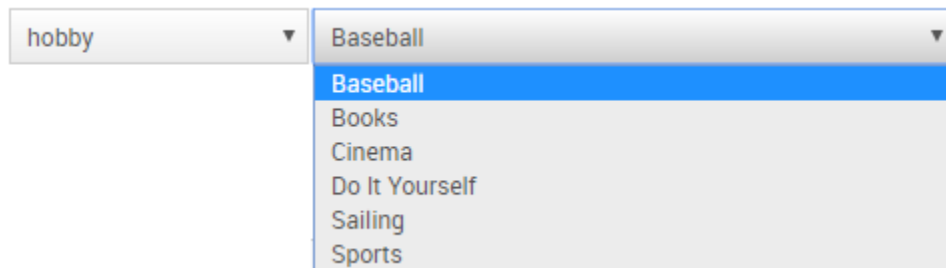
Custom Attributes

You can define a search based on custom attributes. Custom attribute search employs an *Exact Match* strategy. Workspace can search on either the Display name or the Attribute name.

To use a custom attribute, in the Interaction Attributes business attribute, define a new business attribute value where:

- Name = <Name of the custom attribute>
- Display Name = The name displayed in Workspace

Custom Attribute searches can either be presented as a text field where the agent must enter the exact search string to find a match, or you can configure Workspace to display a drop-down menu of search options so that agents do not have to type in the display name.



To do this:

1. Define a business attribute with a name = <Name of the custom attribute> (for example, "hobby") that corresponds to an Interaction Attribute value
2. Assign as the business attribute values the list of options and display names that will be displayed in the combo box for that attribute. For example:
 - Name = Baseball
Display Name = Baseball
 - Name = Books
Display Name = Books
 - Name = Cinema
Display Name = Cinema
 - Name = DIY
Display Name = Do It Yourself
 - Name = Sailing
Display Name = Sailing
 - Name = Sports
Display Name = Sports