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Workspace Desktop Edition Help

[Contact Search](#)

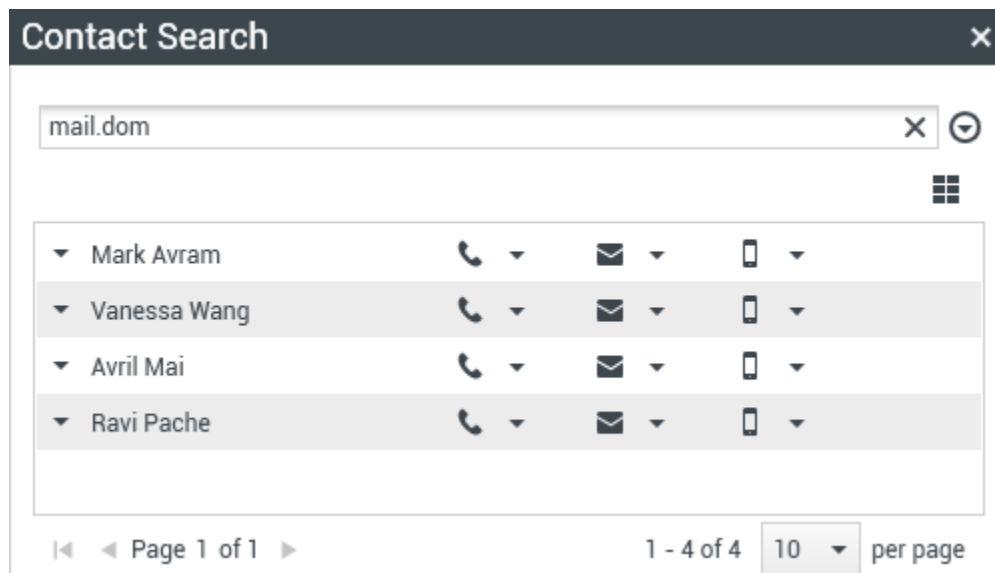
Contact Search

[Modified: 8.5.112.08, 8.5.136.07]

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the [Related Resources](#) section at the bottom of this article.

The **Contact Search** view enables you to use the [Contact Directory](#) to find the email address of the target to whom you want to forward an [inbound email interaction](#), direct an [outbound email interaction](#), or [merge](#) with an existing contact.



You can search the contact database in one of two ways:

- [Quick Search](#)
- [Advanced Search](#)

Tip

Your administrator might configure your system to enable you to search only the contacts that are related to your work.

Quick Search

To search the contact directory, type the name, phone number, or email address of a contact in the **Quick Search** field. Quick Search is a *begins with* search.



Contact Quick Search.

Tip

Genesys does not support *wildcard* characters in contact database searches.

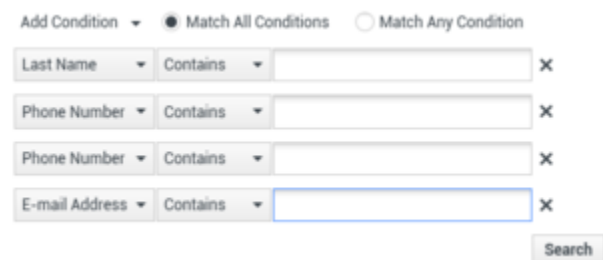
Click the magnifying glass to search for the value that you have entered.

The contact database is search based on your criteria and the **search results** are displayed in the **Contact Directory** view.

Click the **X** to clear the **Quick Search** field.

Advanced Search

Click **Advanced Search** (🔍) to open the **Advanced Search** view.



The Advanced Search form includes a header with 'Add Condition' and two radio buttons: 'Match All Conditions' (selected) and 'Match Any Condition'. Below this are four rows of search criteria, each with a dropdown for the field name, a dropdown for the operator (all set to 'Contains'), an input field, and a clear button (X). The criteria rows are: Last Name, Phone Number, Phone Number, and E-mail Address. A 'Search' button is located at the bottom right of the form.

Contact Advanced Search

Click the **Add Condition** link to add more search criteria. Remove criteria from consideration by clicking the **X** next to the option.

Tip

Genesys does not support *wildcard* characters in Contact Database searches.

Click the magnifying glass to search for the value(s) that you have entered.

The contact database is search based on your criteria and the **search results** are displayed in the

Contact Directory view.

Click the **X** to clear all search field.

Tip

Your administrator configures the default search criteria for this view; however, you can add or remove search criteria as needed. Workspace remembers the last search criteria that you used and displays these when you use the Advanced Search feature again. **[Added: 8.5.112.08]**

Search Results

Search results are displayed in one of three possible view types that each give different results (some environments might have only one type).

In newer environments (UCS 9.1), there is one search results type:

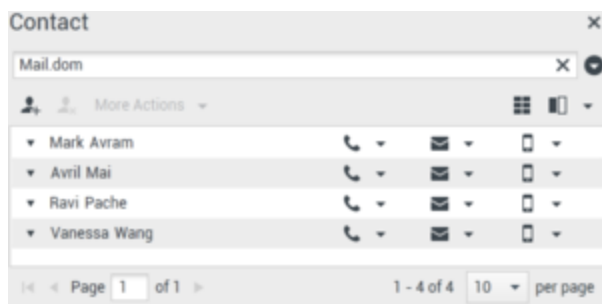
- **Grid View:** Searches each field of the contact database for the keyword(s) or phrase(s) that you specify and displays an unsorted list of all of the contacts in the contact database that match the search criteria. You might be enabled to sort the search results in this view.

In older environments (UCS 8.5), the search behavior is determined by the search result-type that you select (one or both of these options might be available to you, depending on how your administrator has set up your environment):


- **List View:** Searches each field of the contact database for the keywords that you specify and displays an unsorted list of all of the contacts in the contact database that match the search criteria.
- **Grid View:** Searches each field of the contact database for the phrase that you specify and displays a list of records where at least one record field contained the search phrase.

Tip

In some contact centers only one of the two views might be available. In this case, the **List** (☰) and **Grid** (☐) buttons are not displayed. **(Modified: 8.5.105.12)**







Contact Directory

Use the **Show Contacts** View () button to toggle back and forth between the **Grid** and **List** views.

Page Controls

Page through the list of search results by doing any of the following:

- Click the **Go to the Next Page** button () to access the next page.
- Click the **Go to the Previous Page** button () to access the previous page.
- Click the **Go to First Page** button () to return to the start of the list of search results.
- Click the **Go to Last Page** button () to return to the start of the list of search results.
- Specify the number of items that are displayed on each page by using the **per page** drop-down list.

Grid View in newer environments

[**Modified:** 8.5.136.07]

The Grid view in newer environments (UCS 9.1) displays a sortable list of all of the contacts in the contact database that match the search criteria.

The search is a 'keyword' or 'phrase' search that searches each field of the contact database (name, phone number, email address, or other criteria) for the word or words that you provide in the search field. The search engine tries to match *any* word of each field specified in the search criteria (that are allowed by your administrator for Quick Search or that you manually specified for Advanced Search) of the database by using the selected matching mode 'starts with' in quick search, and 'starts with', 'is', or 'contains' in advanced search to search for the keyword(s) that you provide.

Examples:

- Quick search using the keywords *John Daly* as the criteria in a quick search defined to apply to only the **First Name** and **Last Name** fields will match a contact where **First Name**=*John* and **Last Name**=*Daly*
- Quick search using the keywords *John Junipero* as the criteria in quick search defined to apply to only **First Name**, **Last Name**, **City**, and **Address**, will match a contact where **First Name**=*Johnny* and **Address** = *2001, Junipero Serra Blvd.*
- Advanced search set to **Match all criteria using the First Name'** equals *Johnny* and **Address**

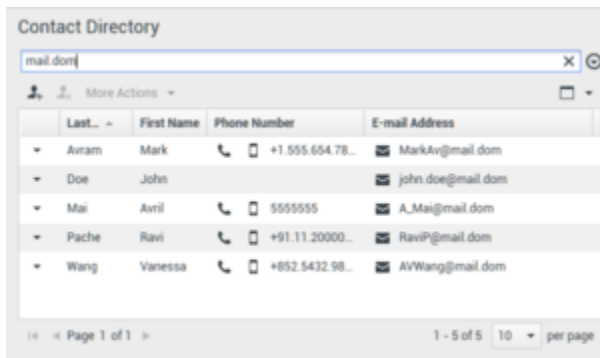
contains *pero* will also match the contact where **First Name** = *Johnny* and **Address** = *2001, Junipero Serra Blvd.*

Results are returned in a list that is sortable. If the result set is too large, you can refine the search results by adding more keywords to your search criteria.

Tip

Genesys does not currently support mixed character sets in contact database searches, so, for example, it is not possible to search for words in Chinese Simplified characters and Latin characters in the same search string, and the sequence of Chinese Simplified characters immediately followed by Latin characters will not be considered as two words.

Use the **page controls** to navigate the list. Click a contact to select it for an **action**. Click the column heads to sort the search results based on contact attributes.



List View in older environments

In older environments (UCS 8.5), click the **Show Contacts in List View** button (☰) to display the **Contact Directory List** view.

The List view displays an unsorted list of all of the contacts in the contact database that match the search criteria.

The search is a 'keyword' search that searches each field of the contact database (name, phone number, email address, or other criteria) for the word or words that you provide in the search field. The search engine tries to match *any* word of each field specified in the search criteria (that are allowed by your administrator for Quick Search or that you manually specified for Advanced Search) of the database by using the selected matching mode 'starts with' in quick search, and 'starts with', 'is', or 'contains', if enabled by your Administrator, in advanced search) to search for the keyword(s) that you provide.

Examples:

- Quick search using the keywords *John Daly* as the criteria in a quick search defined to apply to only the

First Name and **Last Name** fields will match a contact where **First Name**=*John* and **Last Name**=*Daly*

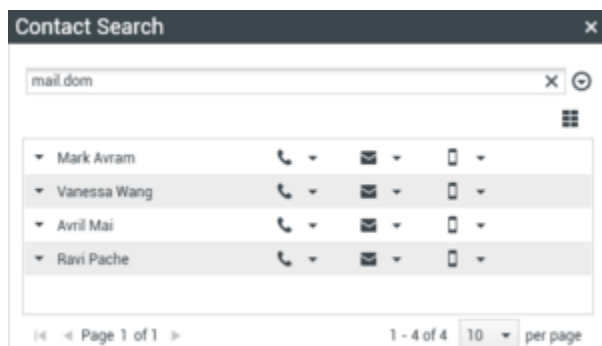
- Quick search using the keywords *John Junipero* as the criteria in quick search defined to apply to only **First Name**, **Last Name**, **City**, and **Address**, will match a contact where **First Name**=*Johnny* and **Address** = *2001, Junipero Serra Blvd.*
- Advanced search set to **Match all criteria using the First Name'** equals *Johnny* and **Address** contains *pero* will also match the contact where **First Name** = *Johnny* and **Address** = *2001, Junipero Serra Blvd.*

Results are returned in a list that is not sortable. If the result set is too large, you can refine the search results by adding more keywords to your search criteria (the sort order in this context is undefined).

Tip

Genesys does not currently support mixed character sets in contact database searches, so, for example, it is not possible to search for words in Chinese Simplified characters and Latin characters in the same search string, and the sequence of Chinese Simplified characters immediately followed by Latin characters will not be considered as two words.

Use the **page controls** to navigate the list. Click a contact to select it for an **action**. Use the **Grid view** to sort the search results based on contact attributes.



Contact Directory in List View.

Grid View in older environments

Click the **Show Contacts in Grid View** button (📊) to display the **Contact Directory Grid** view.

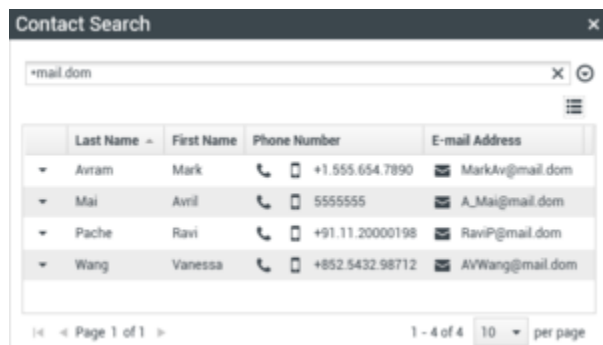
Grid mode performs a search that considers each field of the contact database (name, phone number, email address, or other criteria) as a *phrase* (as opposed to the list view mode that considers each field as a *tokenized* list of words) and uses the search criteria that you provide as a *phrase*, not as a list of words.

Examples:

- Quick search using the phrase *John Pa* as the criteria in a quick search defined to apply to only the **First Name** and **Last Name** fields will match a contact where **First Name**=*John Paul* and **Last Name**=*Doe*
- Quick search using the phrase *John Daly* as the criteria in quick search defined to apply to only the **First Name** and **Last Name** will *not* match a contact where **First Name**=*John* and **Last Name**=*Daly*
- Advanced search set to **Match all criteria** using **First Name** equals *Johnny* and **Address** starts with *2001, Junip* as the criteria will match a contact where **First Name** = *Johnny* and **Address** = *2001, Junipero Serra Blvd.*

Results are returned in tabular form and sorted according to the default search field, such as **Last Name**.

The Grid view can be used to help to refine your search by sorting the results.



Contact Directory in Grid View.

Click a column head in the Grid view to sort the list based on that criterion. Click a column head a second time to switch between ascending and descending sort order. Use the **page controls** to navigate the list. Click a contact to select it for an **action**.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- [Manage Contact History](#)
- [Manage Contacts and Contact Information](#)
- [Manage Your History](#)

Related topics

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- [Contact History](#)
- [Manual and Automatic Contact Assignment](#)

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