Workspace Desktop Edition Help

Manual and Automatic Contact Assignment

5/12/2025

Contents

Manual and Automatic Contact Assignment

[**Modified:** 8.5.117.18]

> **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.

Assigning a contact to an interaction

Link to video

When interactions arrive on your desktop, Workspace tries to assign a contact to the interaction based on the list of existing contacts in your company's database.

Sometimes a known contact might connect anonymously to your contact center by using a phone, email account, or other media that is not part of the information that is stored about that contact in the contact database.

Sometimes more than one contact matches the information, and so Workspace might not be able to correctly assign a contact. By default, the first match is assigned; however, this might not be the correct match. Sometimes two people share the same name. Sometimes two people live at the same address and share the same phone number.

Your administrator might have set up Workspace to let you decide which person is contacting you so that you make the contact assignment manually. If your account is set up for this feature, there are four possible scenarios that you might have to handle:

1. There is no conflict, so Workspace assigns the contact automatically.

   When a call arrives and there is only one matching contact in the database, that contact is assigned automatically. If you discover that the person calling is not the contact assigned, you can press Ctrl-A to assign the call to another contact, and then click **Create New Contact** (👤+) to create a new contact for the call.

2. There are multiple contacts that match the caller.

   When an interaction arrives and there is more than one match in the database, Workspace presents you with a list of suggested contacts.

   Click each one to access their information and click **Assign** when you find the right one.

3. The contact does not match any of the suggested contacts and is not in the contact database.

    If the contact that is not in the contact database is using the same phone number, address, or email address as an existing contact, Workspace will suggest still suggest existing contacts.

    If you determine that the contact is not one of the suggested contacts, you can choose to click **Create New Contact** and manually create a new contact.

    In this case, the new contact is the spouse of an existing contact, living at the same address and using the same phone number.

4. The contact does not match any of the suggested contacts but is in the contact database.

    A contact might call from a phone number or send an email from an address that is not in the contact database.

    If you identify the contact as being one of your known contacts, you can add the interaction to the history of the contact by clicking **Assign Another Contact to this Interaction** () or by pressing Ctrl-A. The **Contact Search** view is displayed.

    a. In the **Quick Search** field, enter the name, or other identifying information of the contact, and click the magnifying-glass icon to begin the search of the contact database.

    b. In the **Search Results** list or grid, select the correct contact.

    c. Click **Assign** to assign this interaction to the selected contact. The interaction is added to the Contact History. Click **Cancel** to return to the blank **Contact Information** view.

    You can also use the **Assign Another Contact to This Interaction** button to create a new contact or to manually reassign an interaction that has been incorrectly assigned to the wrong contact. You can also use the Change Contact view.

[**Added:** 8.5.117.18]

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

Related topics

*   Contact Directory
*   Contact History
*   Voice Tasks Overview
*   Chat Tasks Overview
*   Email Tasks Overview
*   Outbound Campaigns Overview

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