External Contacts

Navigation: Admin → Directory → External Contacts

What Are External Contacts?

External Contacts is the central repository for people and organizations **outside your company** — customers, vendors, partners, suppliers. Contact records surface in the agent workspace during live interactions, giving agents immediate context without switching systems.

There are two object types:

Object	What It Represents
External Organization	A company or entity (e.g., "Oracle Support", "Acme Corp")
External Contact	An individual person, optionally linked to an External Organization

> 💡 **Best practice:** Create the External Organization first, then create contacts linked to it. This allows you to track all individuals from the same company under one record.

Creating an External Organization

1. Admin → Directory → **External Contacts**
2. Click **Add → Organization**
3. Fill in:

Field	Notes
Name	Company name — required
Website	Company URL
Address	Physical address

Field	Notes
Custom Fields	Org-specific fields you've configured (e.g., Account ID, SBC Serial Number)

4. Click **Save**

Creating an External Contact

1. Admin → Directory → **External Contacts**
2. Click **Add → Contact**
3. Fill in:

Field	Notes
First Name / Last Name	Required — the only mandatory fields
Associate Org	Link to an External Organization (search and select)
Email	Work, cell, or home addresses
Phone	Add one or more numbers
SMS Toggle	⚠ Click the SMS icon next to each phone number to explicitly enable or disable SMS — not enabled by default
Social Media	Add handles for WhatsApp, Twitter/X, Facebook, Line
Survey Opt-Out	Check to prevent automated post-call surveys from being sent to this contact
Notes	Free-text historical context not captured in standard fields
External System Link	A URL pointing to your own internal CRM or database record for this contact

4. Click **Save**

SMS Toggle — Important Detail

SMS capability on a phone number is **not enabled by default**. For each number on a contact record:

- Click the **SMS icon** next to the number
- Toggle to **On** to allow agents to send SMS to that number
- Toggle to **Off** to block SMS to that number

This must be set explicitly — there is no org-wide "enable SMS for all contacts" switch.

Survey Opt-Out

The **Survey Opt-Out** checkbox on a contact record:

- Prevents automated post-interaction surveys from being sent to that contact
- Applies across all survey methods configured in the org
- Should be set when a customer has explicitly requested no surveys

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Custom Fields

Both External Organizations and External Contacts support **custom schema fields**:

- Fields are configured by admins at the schema level (not per-record)
- Examples: Account Tier, Contract ID, SBC Model, Support Level
- Appear in the contact/org record and in the agent workspace pop-up

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Bulk Management

For large contact databases, manual entry is not practical. Three methods:

Method	Best For
CSV Upload	One-time or periodic bulk imports from a spreadsheet
CRM Sync	Continuous sync from Salesforce or other supported CRMs — keeps contacts current automatically
External Contacts API	Custom integrations pushing data from internal systems (ticketing, billing, ERP, etc.) into Genesys

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Where Agents See This Data

During a live interaction, the **CX Agent Workspace** automatically surfaces the matching External Contact record when the caller's number matches a record in External Contacts. Agents see:

- Contact name and organization
- Phone numbers and email addresses
- Social handles
- Notes and custom fields
- Link to the external system (if configured)

This eliminates the need for agents to look up customer records manually during a call.

Division Behaviour

> ⚠ External Contacts **cannot be reassigned between divisions** after creation. If a contact needs to move to a different division, you must delete the record and recreate it in the correct division.

Plan your division structure before bulk-importing contacts.

Quick Reference — Key Facts

Feature	Detail
Object types	External Organization + External Contact
Required fields (Contact)	First Name and Last Name only
SMS	Must be explicitly toggled per phone number
Survey opt-out	Per-contact checkbox
Division reassignment	Not supported — delete and recreate
Bulk import	CSV, CRM sync (Salesforce), or API
Agent visibility	CX Agent Workspace during live interactions
Custom fields	Configurable at schema level for both Orgs and Contacts

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See Also

- **Divisions & Access Control** — division assignment at contact creation time
- **Integration Management** — CRM sync configuration (Salesforce, etc.)
- **Queue & Routing Management** — how interaction routing connects to contact lookup

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Revision #1
Created 12 March 2026 22:39:57 by Cesar Gzz
Updated 13 March 2026 00:20:17 by Cesar Gzz