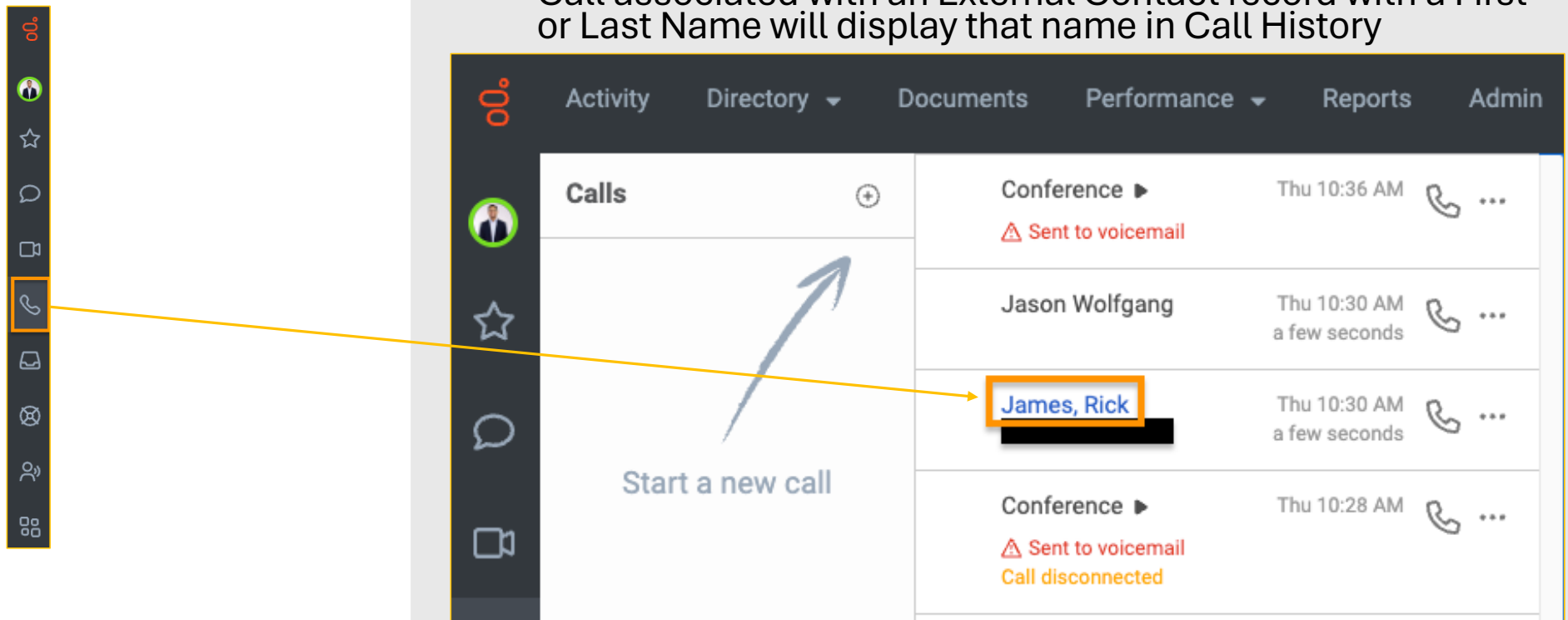


External Contact Name in Call History Beta

What it is

- Call associated with an External Contact record with a First or Last Name will display that name in Call History



The screenshot displays a user interface for managing calls. On the left, a vertical sidebar contains several icons, including a telephone handset icon which is highlighted with a red box. An arrow points from this icon to the 'Calls' section of the main interface. The 'Calls' section features a list of call records. The first record is a 'Conference' call at 'Thu 10:36 AM' with a status of 'Sent to voicemail'. The second record is for 'Jason Wolfgang' at 'Thu 10:30 AM' with a status of 'a few seconds'. The third record is for 'James, Rick' at 'Thu 10:30 AM' with a status of 'a few seconds'; this entry is highlighted with a red box. The fourth record is another 'Conference' call at 'Thu 10:28 AM' with a status of 'Sent to voicemail' and 'Call disconnected'. The interface also includes a 'Start a new call' button and a 'Calls' header with a plus icon.

Call Type	Time	Status
Conference	Thu 10:36 AM	Sent to voicemail
Jason Wolfgang	Thu 10:30 AM a few seconds	
James, Rick	Thu 10:30 AM a few seconds	
Conference	Thu 10:28 AM	Sent to voicemail Call disconnected

How it works

- Clicking the hyperlink in call history displays the External Contact's detail record

The image illustrates the workflow for viewing a contact's detail record from a call history entry. On the left, a vertical sidebar contains icons for various functions, with the 'Calls' icon highlighted. The main interface shows a 'Calls' section with a list of recent calls. One call entry, 'James, Rick', is highlighted with a red box. An arrow points from this entry to a detailed view on the right. The detailed view shows the contact's name, 'James, Rick', and a list of interactions. The interactions table includes columns for Interaction Type, Date, Direction, Screenshare, Agent, Notes, and Survey. The table shows several voice interactions on 3/21/24, with agents John Thomas and Jason Wolfgang. The bottom of the page displays pagination information: '1 - 15 of 15' and '25 per page'.

Activity Directory Documents Performance Reports Admin

Calls

Start a new call

Conference Thu 10:36 AM
Sent to voicemail

Jason Wolfgang Thu 10:30 AM
a few seconds

James, Rick Thu 10:30 AM
a few seconds

Conference Thu 10:28 AM
Sent to voicemail
Call disconnected

External Contacts and Organizations / James, Rick

James, Rick
Created on 2/28/24 - Last updated on 2/28/24

Edit Contact Delete

Contact Summary

Name
James, Rick

Mobile Phone (Accepts SMS)
[Redacted]

Interactions

Last 30 days
February 21, 2024 - March 22, 2024

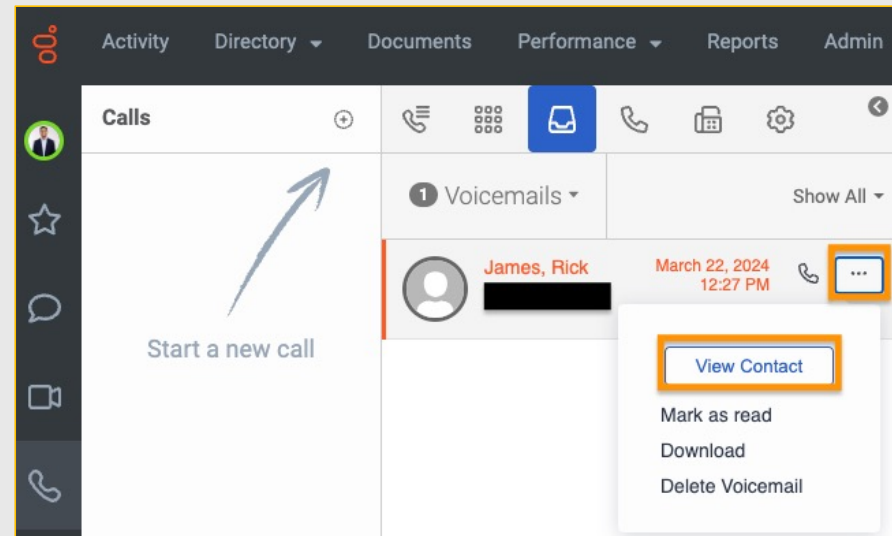
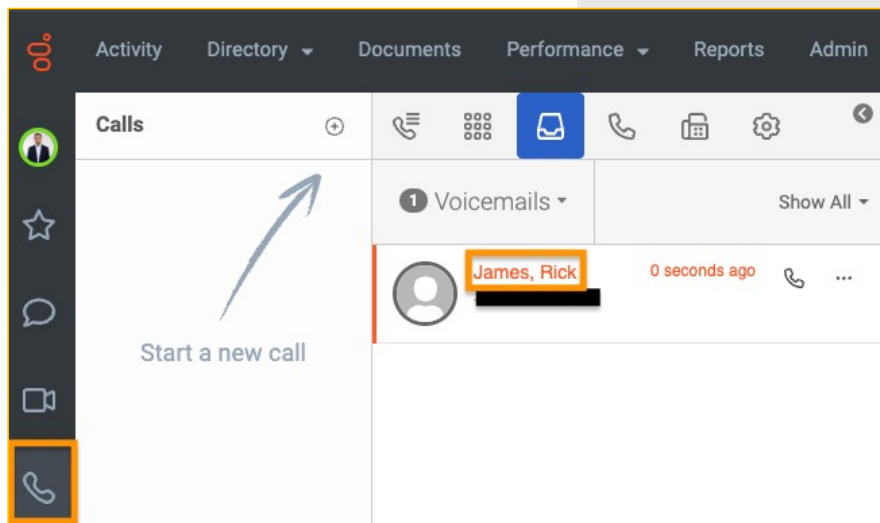
Filter Interactions

Interaction Type	Date	Direction	Screenshare	Agent	Notes	Survey
Voice	3/21/24	→		John Thomas	Default Wrap-up Code	
Voice	3/21/24	→		No agent		
Voice	3/21/24	←		Jason Wolfgang		
Voice	3/21/24	→		John Thomas		
Voice	3/21/24	→		No agent		

1 - 15 of 15 25 per page Page 1 of 1

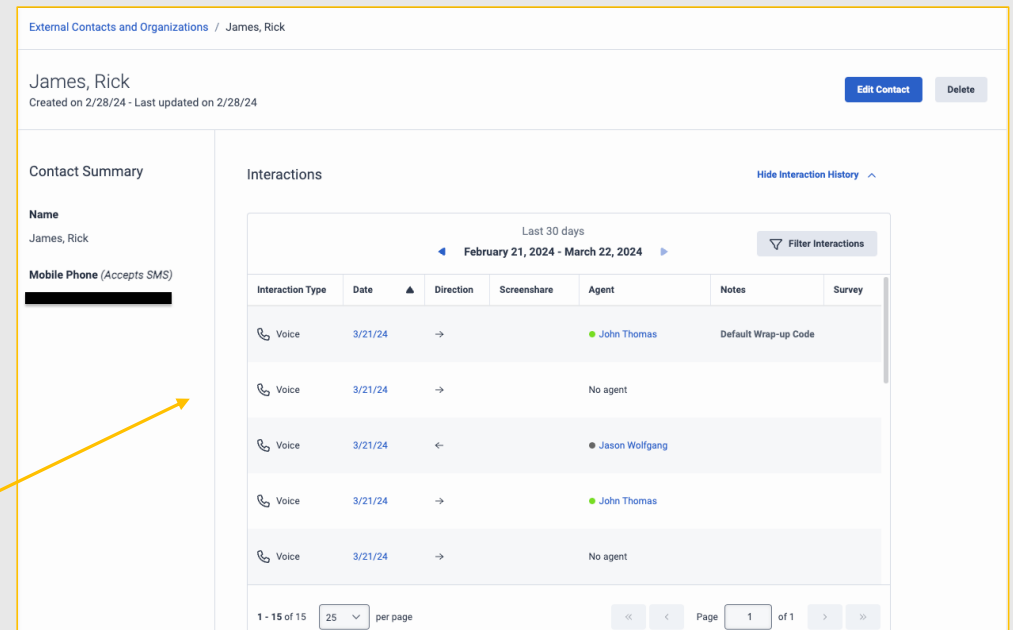
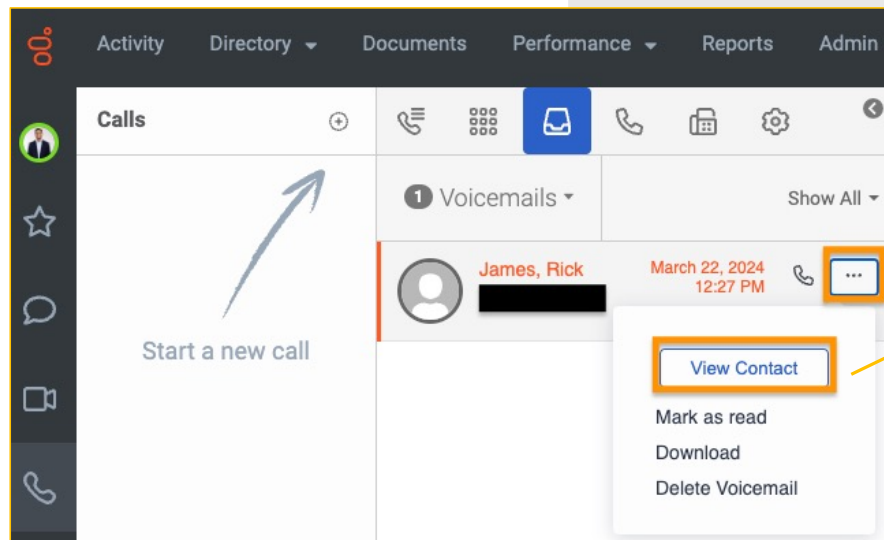
What it is

- Communicate Voicemails associated with an External Contact record with a First or Last Name will display that name your Voicemail Inbox



How it works

- Clicking “View Contact” from the Voicemail Inbox displays the External Contact’s detail record



Troubleshooting

My External Contact Name is not displaying

Users	Date	Conversation Duration	External Contact
John Thomas	Thu, Mar 21, 2024 11:27 AM	41s	James, Rick
John Thomas	Thu, Mar 21, 2024 10:55 AM	22s	James, Rick
Jason Wolfgang, John Thomas	Thu, Mar 21, 2024 10:48 AM	29s	James, Rick
-	Thu, Mar 21, 2024 10:47 AM	3s	-
Jason Wolfgang, John Thomas	Thu, Mar 21, 2024 10:47 AM	9s	-
-	Thu, Mar 21, 2024 10:43 AM	4s	-
Jason Wolfgang, John Thomas	Thu, Mar 21, 2024 10:43 AM	11s	-
-	Thu, Mar 21, 2024 10:40 AM	3s	-
Jason Wolfgang, John Thomas	Thu, Mar 21, 2024 10:40 AM	12s	-
-	Thu, Mar 21, 2024 10:36 AM	4s	-
Jason Wolfgang, John Thomas	Thu, Mar 21, 2024 10:36 AM	14s	-
Jason Wolfgang, John Thomas	Thu, Mar 21, 2024 10:30 AM	8s	-
John Thomas	Thu, Mar 21, 2024 10:29 AM	17s	James, Rick
John Thomas	Thu, Mar 21, 2024 10:27 AM	16s	James, Rick, 977dd9f9-ffe0-46d9-982f-581bb64f4dbd
Jason Wolfgang	Thu, Mar 21, 2024 10:15 AM	18s	977dd9f9-ffe0-46d9-982f-581bb64f4dbd
-	Thu, Mar 21, 2024 10:14 AM	35s	3921ae27-9c5e-445d-8e78-afa5d0352185
Jason Wolfgang, John Thomas	Thu, Mar 21, 2024 10:14 AM	35s	977dd9f9-ffe0-46d9-982f-581bb64f4dbd
-	Thu, Mar 21, 2024 10:06 AM	5m 22s	3921ae27-9c5e-445d-8e78-afa5d0352185
Jason Wolfgang, John Thomas	Thu, Mar 21, 2024 10:06 AM	27s	977dd9f9-ffe0-46d9-982f-581bb64f4dbd

- Possible Cause: The "from" phone number linked to the voice call might not match the external identifier assigned to the intended external contact.
 - To determine if this is the case, navigate to the Performance > Interactions view
 - Continued on next slide

Helpful links: [API Explorer](#)



Troubleshooting

My External Contact Name is not displaying (cont'd)

Helpful links: [API Explorer](#)

- If this matches your scenario, you can release the phone number in question as an identifier for the undesired External Contact

- [PATCH /api/v2/externalcontacts/contacts/{contactId}/identifiers](#)
 - Copy the undesired contactId from the interactions page and use it as the contactId parameter for this Public API endpoint
- Request body

```
{
  "operation": "Release",
  "identifier": {
    "type": "Phone",
    "value": "+12345678999"
  }
}
```

Troubleshooting

My External
Contact Name is
not displaying
(cont'd)

Helpful links: [API Explorer](#)

- Now, you can assign the phone number as an identifier to the desired External Contact

- [PATCH /api/v2/externalcontacts/contacts/{contactId}/identifiers](#)

- Request body

```
{  
  "operation": "Claim",  
  "identifier": {  
    "type": "Phone",  
    "value": "+12345678999"  
  }  
}
```


Troubleshooting

My External
Contact Name is
not displaying
(cont'd)

- Resolution: future phone calls from this phone number will be mapped to the desired External Contact record and will display in the Call History and Voicemail inbox as desired.

Helpful links: [API Explorer](#)