

Search calls Or SMS interactions

Purpose: Find a specific caller or reason fast.

Steps

1. Click into **Search** (top-right).
 2. Type any of the following:
 - **Phone number** (full or partial): e.g. `617-334-2317`
 - **Primary reason keyword:** `refill`, `appointment`, `billing`
 - **Assignee name** (if your org uses assignment)
 3. Press **Enter**. Combine with filters for best results (see [Create your own filters](#)).
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