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Genesys Engage cloud Workspace Web Edition Agent Desktop Help

Workitems

5/1/2025

Workitems

Workitems are documents that might be directed to you for handling. They include many media types, such as faxes or PDFs, that you might have to view while you are handling interactions of another type, such as email.

The Workitem interaction window enables you to view all of the information necessary to handle a workitem.

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How do I handle a workitem?

Link to video

Typical actions you can take with a workitem are:

- . CJ to transfer the workitem to another agent.
- 📑 to save it in your workbin.
- View the associated case data.
- Add a note or disposition code.
- Mark it as done.

Watch the video to see what happens when a workitem arrives at a workstation.

How can I get help with a workitem?

Senesys • Workspace	
🛞 🖌 Avril Mai 🛈 35:27 门 - 🎽 🕢 🔍 -	
Case Information	Int
Origin: Inbound workitem	
Subject: Wed Nov 16 16:19:15 CET 2016	8
✓ Avril Mai @ Connected	Gener
Media Type: workitem	
Interaction Type: Inbound	
CEI 2016	LA

- Check the associated case data for information that might help you.
- Call the contact, if your site has this feature and their number is available in your contacts list.
- Les to start a consultation with a team member. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

If you are transferring the workitem to someone else, you can add your own notes or instructions for that person to review.

Transferring a Workitem

To transfer a workitem that you have accepted, click the **Workitem Transfer** () is displayed. Choose a transfer target. The target must be configured to receive interactions of the type of the workitem. Select **<workitem type**> **Transfer**.

If the target accepts the interaction, the interaction window on your desktop closes.

If the target rejects the interaction, the interaction window reopens on your desktop and displays an error that informs you that the target has rejected the interaction.