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Genesys Engage Workspace Web Edition Help

Team Communicator

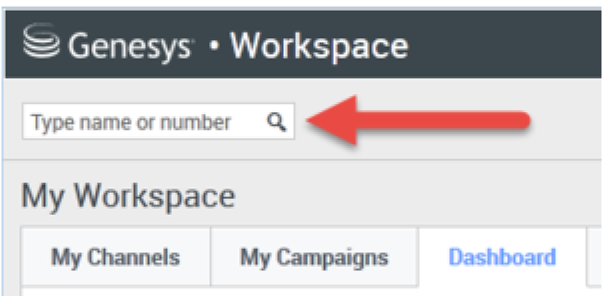
4/10/2025

Team Communicator

How do I start a call or an email message?

To start a voice call or an email interaction, just click in the Team Communicator and start typing information about who you want to call or email. The Team Communicator is a feature that lets you to find someone in your company's directory (an internal target) or someone from outside your company (like a contact) who has their information stored in the contact directory.

You can enter a name, part of a name, a phone number, or an email address into the Team Communicator field and immediately start a call or email message to that person. Your administrator might set up your system to restrict whom you can search for.



Main Window Team Communicator. Use this to type in names, phone numbers, and email addresses.

Watch video: Finding a Contact

Link to video

You might be dealing with a customer who has an issue that you need help to resolve. Just use the Team Communicator to start a voice call with the person in your company or outside your company who can help you.

The Team Communicator is part of the Main View, and it is also available in the following views Interaction windows (for transfer, conference, and consultation actions):

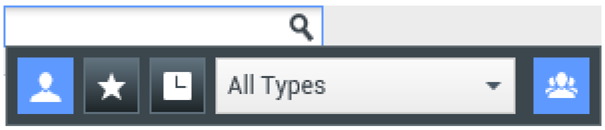
- Voice
- Chat
- E-mail
- Facebook
- Twitter

Type a name or number in the Team Communicator text field to begin your search. When you click in the field, the Team Communicator toolbar is displayed. The toolbar enables you to search All, your Favorite, Corporate Favorite, or Recent contacts and internal targets. It also enables you to filter by contact or internal-target type and to group or ungroup your search results.

In the Main View

How do I use the Team Communicator in the Main View?

The Main View contains the Team Communicator **Quick Search** field. The **Quick Search** field is a universal-lookup tool. The tool can search both the contact database and the internal-target directory. Your system administrator might have configured it to provide universal contact lookup or simply to provide internal-target lookup.



The Team Communicator, for starting calls, emails, transfers, conferences, and consultations

Starting a call or email

When you select Team Communicator, a toolbar is displayed. Enter a name, telephone number, or other keywords in the field to begin your search. As you type, the Team Communicator suggests known agents, contacts, and other resources.

Click the name of the person that you want to contact from the results list.

You can still start an interaction with someone who is not in your company database by typing in the full telephone number or email address and then clicking the Call or Email button in the Action Menu beside the name or email address.

The toolbar enables you to filter your search results of contacts and internal targets by types of calls or contacts:

- Search all contacts ()
- Search favorite contacts ()
- Search recent contacts ()

It also enables you to filter by contact or internal-target type, and to group or ungroup () your search results by category or type.

Your system might be set up to alert you if you have missed a call.

Click in the Team Communicator text field to open the Team Communicator. If you have a missed call, the **Show and search recent** () button is orange. Click the button to display the list of missed calls. A small downward pointing outlined arrow icon is displayed beside the number of the party who called you. If you hover your mouse pointer over the contact entry, a tooltip displays the missed call information, including date, time, and known contact details.

In the Team Communicator, a contact who has called recently has one of three small arrows displayed beside the contact's name.

- — A solid downward pointing arrow indicates an answered call
- — An upward pointing arrow indicates an outbound call to the contact
- — An outlined downward pointing arrow indicates a missed call

To get details about the call, whether answered, missed, or outbound, hover your mouse pointer over the contact name or number.

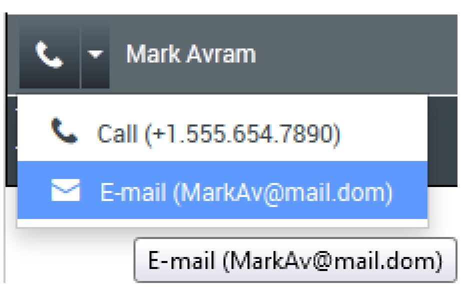
When you close the Team Communicator, or if you switch the filter to All contacts or Favorite contacts, the **Recent** button changes back to white if you have viewed your recent calls and missed calls or if you have called back all of your missed calls.

Calling and Emailing

You use the Team Communicator to make a new voice call or email interaction.

Starting a New Interaction

To launch a new interaction (external or internal interaction), use the Team Communicator to find and select a target or contact. Enter the name of an internal target (agent, skill, agent group, or Routing Point) or a contact name, telephone number, or email address in the universal-lookup field.



As you type, Workspace Web Edition searches the internal target and contact databases and lists potential contacts and internal targets.

From the list, you can:

- Select the kind of interaction you want to launch, voice or outbound email.

You can use the Controls in Team Communicator to do the following:

- Filter and sort the list of search results.
- Perform actions on a selected contact for calling.

Watch video: Starting a new email

Link to video

Watch video: Making a new voice call

Link to video

Filter/Sort Your Results

Filtering and Sorting the List of Search Results

The Team Communicator search is a “keyword” search that checks each field of the contact database for the word or words (name, telephone number, or other criteria) you provide in the search field. Each field of the database is searched by using a “starts-with” search for the keywords you provide.

Results are returned in a list that is sorted according to the scoring rules. In most cases, you can refine the search results by using the filtering features of the list view. For example, you can filter your search results so that only agents or queues are displayed.

Result types might include the following:

- All types
- Agent
- Agent Group
- Routing Point
- Skill
- Contact
- Interaction Queue

Select the **Sorting by Category** icon ( ) to arrange the search results by category. You can collapse categories by selecting the arrow displayed beside the name of the category.

Below the **Quick Search** field are four controls you can use to list previous contacts quickly.

From left to right, the buttons are the following:

- **Search All** — Select from all matching internal targets and contacts. Does not affect the sort order.
- **Show and Search my Corporate Favorites** — Click to show only contacts/internal targets that

you have flagged as corporate favorites. Sort is by category or type.

- **Show and Search my Recent Contacts/Targets** — Select from the last 1 to 10 contacts/internal targets you have directly dialed,emailed, or monitored. Sort is by date.
- **Filter by Type** — Select the type to search, including Agent, Contact, Routing Point, Skill, Queue, Interaction Queue, and Agent Group.
- **Sorting by Category/Sorting by Type** — Select to sort by category or type.

Using Favorites

How do I use Personal and Corporate Favorites?

A favorite is someone with whom you interact frequently.

The Workspace Team Communicator enables you to mark contacts and internal targets (like other agents, your supervisors (team leads), or call routing) as your personal favorites. This is useful if you have a supervisor that you need to contact regularly for help about specific types of customer issues or a routing point to which you must regularly direct certain types of inquiries.

You can also "unfavorite" (remove) a contact or target from the list of favorites when you no longer need to quickly find them.

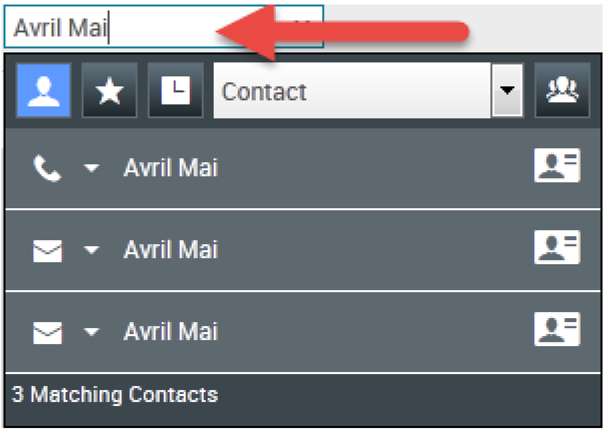
Your administrator might also have chosen for you specific targets as "corporate favorites". In Team Communicator, corporate favorites are marked by a locked star icon (). This means that you cannot "unfavorite" (remove) them from the list of favorites. Your administrator might designate corporate favorites for you that change based on your role in the company or by the contact with whom you are currently interacting.

The favorites that you choose are marked by a white star ().

Choosing Personal Favorites

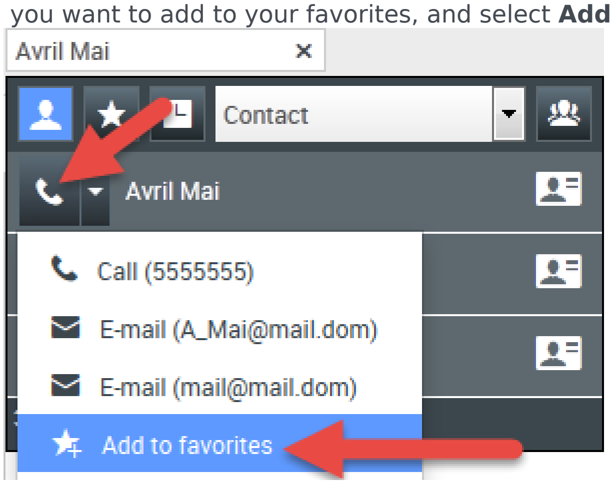
To help you to find contacts and internal targets quickly, use the **Action Menu** in the Team Communicator next to the name of the contact or target. Follow these steps:

1. Find the internal target or contact in the Team Communicator.



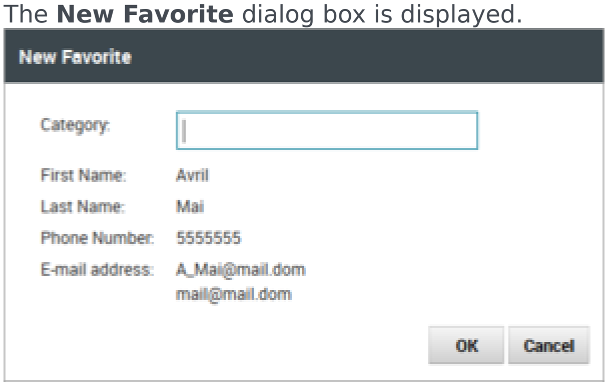
Type in the name, phone number, or email address of the target you want to find

2. Click to open the **Action Menu** that is displayed beside the name of the internal target or contact that you want to add to your favorites, and select **Add to Favorites**.



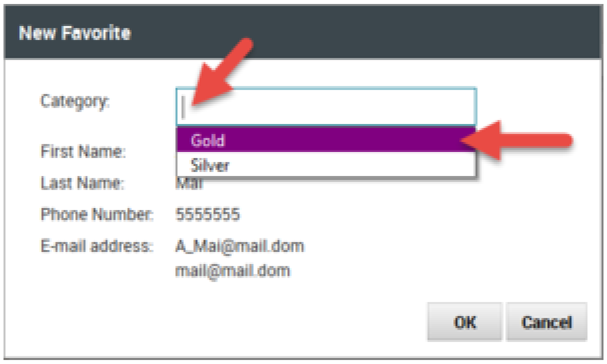
Click Add to Favourites

The **New Favorite** dialog box is displayed.



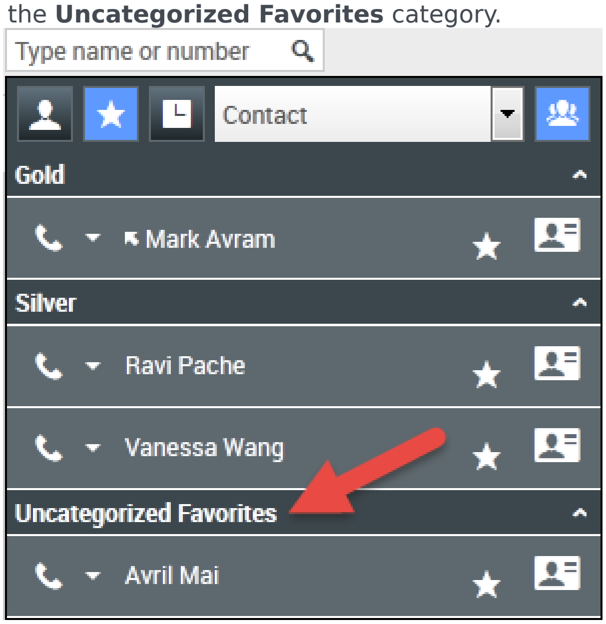
The New Favorite dialog box

- If you want, use the **Category** drop-down list to define a new category for your favorite, or select from a list of existing categories.



(Optional) Choose or create a category for your new favorite

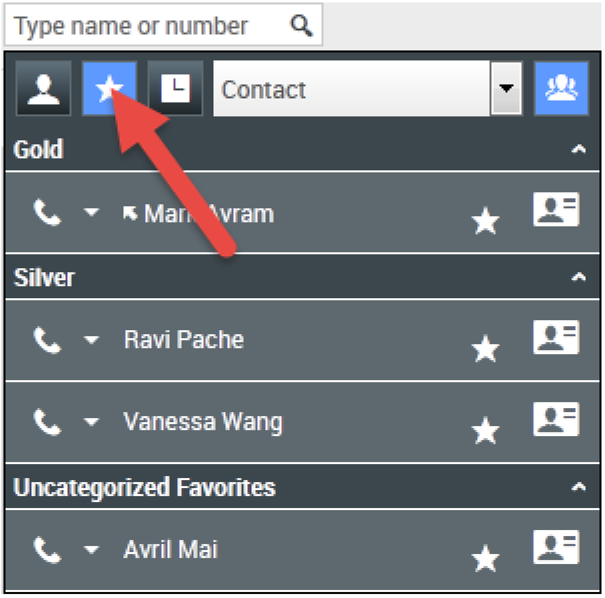
- Click **OK** to add the internal target or contact as a favorite. If you did not choose a category, and you choose to view favorites by category in the Team Communicator, the new favorite is listed in the **Uncategorized Favorites** category.



Viewing favorites by category

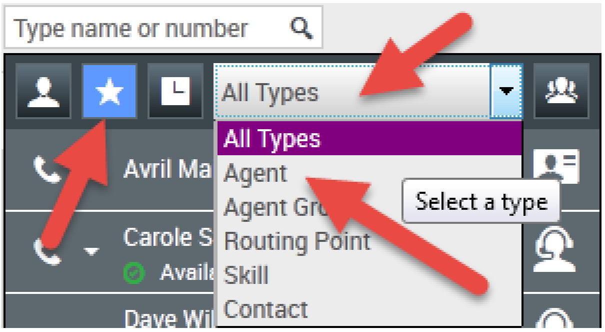
Viewing and Managing Your Favorites

When you want to see the complete list of your personal and corporate favorites, click in the Team Communicator search field, then click the **Favorites** filter button (see the figure below).



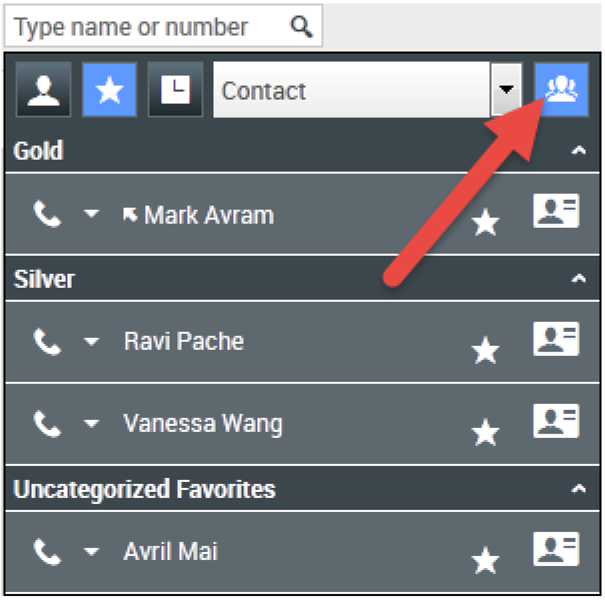
Click the Favorites filter button to see your personal and corporate favorites

Use the Type filter drop-down list to change the types of contacts and targets are listed in the Team Communicator. You can view just agents, contacts, agent groups, routing points, or skills, or you can view all types of targets.



Click the Favorites filter button to see your personal and corporate favourites, then filter by type using the Type drop-down list

Use the Sorting by Category button to arrange the list of favorites into their designated categories. Any favorites that have not been assigned to a category are listed in the **Uncategorized Favorites** category.



Click the Favorites filter button to see your personal and corporate favourites, then click the **Sort by Category** button to list favorites by category

> ## Important
> A favorite that you created by directly dialing a contact will appear only in Favorite search and in your list of recent calls if you previously called the person. If you do not apply the Favorites filter to your search, only the following object types are searched: Agent, Contact, Routing Point, Skill, Queue, Interaction Queue, and Agent Group.

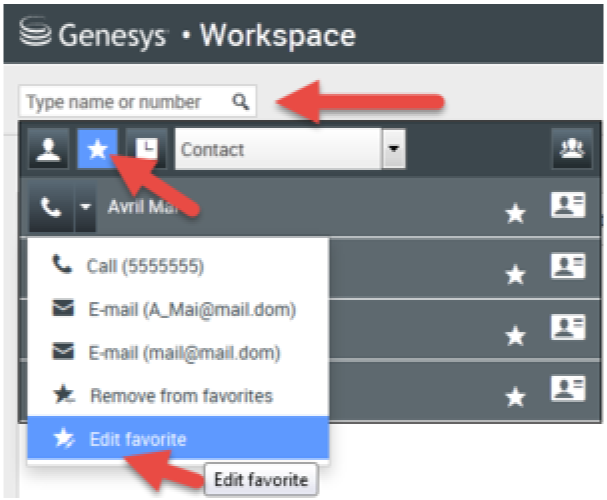
You can edit a favorite to add, remove, or change a category. Select **Edit Favorite** () from the **Action Menu** to display and use the **Edit Favorite** dialog box.

You can remove an internal target or a contact from your list of favorites by selecting **Remove from Favorites** () from the **Action Menu**.

Editing the Category of a Personal Favorite

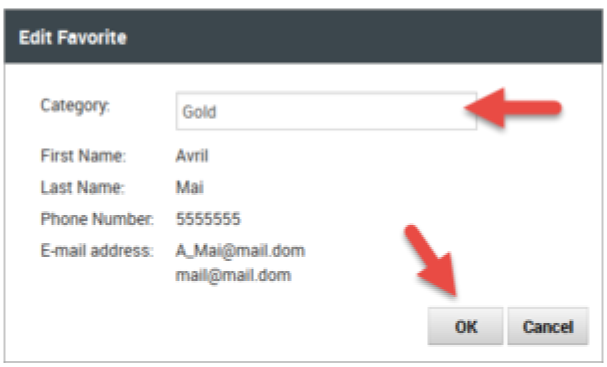
When you want to add, remove, or change the category that you have assigned to a favorite contact or other target, you can use the Team Communicator to edit the category.

First, use Team Communicator to find the favorite either by entering the name in the search field and/or by clicking the **Favorites** button (). Next, open the **Action Menu** next to the name of the contact or other target and select the **Edit favorite** option.



Find the favorite you want to edit then use the Action Menu to select Edit favorite

The Edit Favorite dialog box is displayed. Make the change to the category by editing the content of the Category field. You can modify the category, delete the category, or change the category.



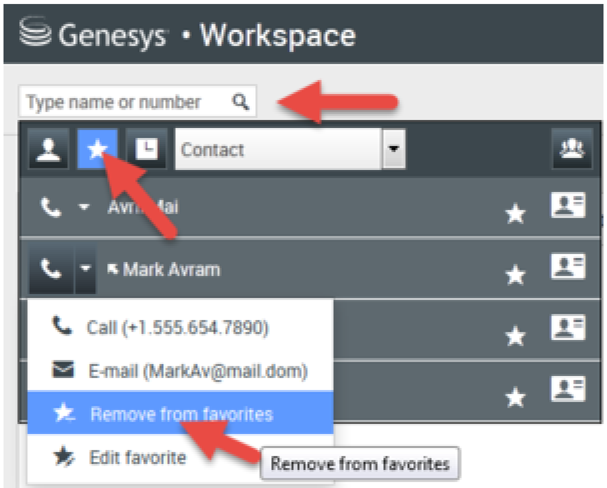
Edit favorite

Click **OK** when you are done to save the modification.

Removing a Personal Favorite

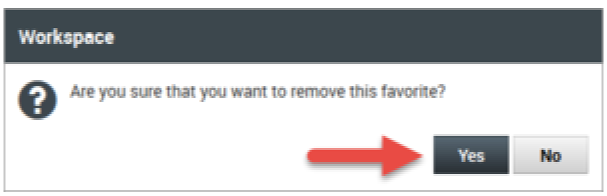
When you no longer want a contact or other target that you have added as a favorite to be on your list of favorites, you can use the Team Communicator to remove the favorite.

First, use Team Communicator to find the favorite either by entering the name in the search field and/or by clicking the **Favorites** button (). Next, open the **Action Menu** next to the name of the contact or other target and select the **Remove favorite** option.



Find the favorite you want to remove then use the Action Menu to select Remove favorite

A confirmation dialog box is displayed when you choose **Remove favorite**. Click **Yes** if you are sure that you want to remove this contact or target from your list of personal favorites. Click **No** to keep the contact or target on your list of personal favorites.



This confirmation message request that you confirm that you really want to remove the selected favorite from your list of favorites

Important

- You cannot edit or remove corporate favorites. These favorites are controlled by your administrator.
- If you added a target as a personal favorite and then your administrator adds this same target as a corporate favorite, that target will be designated as a corporate favorite in the flat view, and as both a Personal Favorite and Corporate Favorite in the categorized view.