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# Workspace Desktop Edition User's Guide

**Conference A Chat Interaction** 

5/10/2025

# Conference A Chat Interaction

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  - 1.1 Starting a Chat Conference
  - 1.2 Starting a Chat Conference with an Active Consultation

In this lesson, you will learn how to transfer chat interactions. This lesson contains the following sections:

- Starting a Chat Conference
- Starting a Chat Conference with an Active Consultation

## Starting a Chat Conference

The Interaction Workspace Chat Interaction window enables you to instant-conference your current chat interaction with an internal target. In an instant conference, the conference starts as soon as the other party accepts the interaction. This section contains the following procedure:

- Lesson: Starting an instant chat conference
- Lesson: Receiving a chat conference
- Lesson: Starting a chat conference with an active consultation

#### Lesson: Starting an instant chat conference

#### **Purpose:**

• To find an internal target (such as an agent, Routing Point, or queue), and then start and complete a chat conference with the internal target and the current contact.

#### Start

 In the active Chat Interaction window, click the Instant Conference button to open the Team Communicator (see the Finding an internal target for a chat conference in the active Chat Interaction window figure).



Finding an internal target for a chat conference in the active  $\ensuremath{\mathsf{Chat}}$  Interaction window

2. Click the Action Menu drop-down list that is displayed next to the name of the internal target with whom you want to conference, and then select Instant Chat Conference. When the internal target accepts the interaction request, a Chat Interaction window opens on the desktop of the conference target. The Chat Interaction window displays the entire transcript of the chat session between you and the contact (see the Chat Interaction window on the desktop of your conference target displaying the chat transcript and connection status figure).

Avril Mai     Connected     Kate Lewis     Connected	
K - K - K - K - K - K - K - K - K -	
	Send

Chat Interaction window on the desktop of your conference target displaying the chat transcript and connection status

The internal target is added to the chat session in your Chat Interaction window. You, the contact, and the internal target can each see what is sent by the others (see the Chat Interaction window displaying the chat transcript and connection status of your conference figure).

<ul> <li>✓ Avril Mai</li> <li>◯ Connected</li> <li>✓ John Davis</li> <li>◯ Connected</li> </ul>	
Set Constant and Constant	*
[10:04:45 PM] John Davis: Heid, yes, I can hep [10:05:09 PM] Avril Mai: Great! Thank you! [10:05:27 PM] John Davis: My pleasure	111 *
Great, John, thank you	Send

Chat Interaction window displaying the chat transcript and connection status of your conference

If the conference target does not accept your request, the conference request is released.

3. If you click the End button and the internal target agent is still connected, the session is transferred automatically to the internal target agent. If you have completed your chat interaction and the internal target agent has already disconnected from the conference, go to Step 8 of the Lesson: Handling an inbound chat interaction.

End

Lesson: Receiving a chat conference

#### **Purpose:**

• To receive and join a conference chat interaction with another agent and their active chat interaction party.

#### **Prerequisites**

- You are logged in to Interaction Workspace (see Lesson: Logging in to Interaction Workspace).
- Your status is Ready for the chat media channel (see Lesson: Going Ready in the Interaction Workspace Main window).

#### Start

 If another agent wants to chat conference with you and a contact about their current interaction, the agent can start a chat conference. If the other agent is handling a chat interaction and initiates a chat conference request, you are notified of the request by the Interaction Workspace Interaction Preview interactive notification (see the Interaction Preview interactive notification, informing you of a conference request figure).

ce
Accept

nteraction Preview interactive notification, informing you of a conference request

Click Accept to connect to the conference. The Chat Interaction window is displayed (see the Chat Interaction window, displaying your status as Connected to the conferencing agent figure).

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Avril Mai 🙄 (00:00:56)		
Case Information		1
Origin: Inbound chat		DONTA
✓ Avril Mai		9
🕶 Kate Lewis 🤤 Connected		
• ⊈• ©• , <mark>%</mark> • ,		
2:22:33 PM] New party 'Kate Lewis' has joined the session	*	
2:22:42 PM] Kate Lewis: Hello 2:23:00 PM] Avril Mai: Hello, 1 am having trouble with my on line nurthase.		
2:24:03 PM] Kate Lewis: I can get our on line specialist to help you with your	E	
urchase. 2:25:06 PM] New party 'John Davis' has joined the session		Þ
	*	RESP
tello, how can I help you]		ONSE
	iend	S
	•	Send
Disposition Code Note		
Conferenced on 3/15/2011 2:25:01 PM by Kate -		
	Save	

Chat Interaction window, displaying your status as Connected to the conferencing agent

- 2. The Interaction Workspace Chat Interaction window enables you to perform the following functions while you are chatting with the conferencing agent and the contact:
  - End the connection"This function ends your participation in the consultation call; you are not added to the conference.
  - Start a conference.
  - Transfer the chat to a different internal target.

For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*. When you join the conference, all three parties will see any text that you enter into the Chat Interaction window. Your status is Connected (see the Chat Interaction window, displaying your status as Connected to the conferencing agent figure). When you are in a chat conference, you can perform the following functions:

- Use the Conference Party Action Menu (adjacent to the Party Status--see the Conference Party Action Menu figure) to do the following:
  - Call--Start a voice call to the party.
  - · Start Instant Message Consultation -- Start an IM consultation with the party.
  - New E-mail--Terminate the connection to the party.
  - Delete From Conference--Terminate the connection to the party.

For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*.

- End the chat--Terminates your connection to the conference. The conferencing agent remains connected to the contact.
- Set a Disposition Code for the chat.

🕶 Kate Lewis 🥥 Connected		
Call     Start Instant Message Consultation     New E-mail	cialist to help you with your	*
Delete From Conference	u?	

Conference Party Action Menu

#### Remaining Connected After the Conferencing Agent Disconnects

If the conferencing agent releases the chat, the conferencing agent is disconnected, but you remain connected to the contact (see the Voice Interaction window showing that the calling agent has left the conference, but you remain connected to the contact figure). You can complete your interaction with the contact, transfer the contact, or start a new conference.

R 🗣 👳 , 28	
[2:23:00 PM] Avril Mai: Hello. 1 am having trouble with my on line purchase. [2:24:03 PM] Kate Lewis: I can get our on line specialist to help you with your	*
[2:25:06 PM] New party 'John Davis' has joined the session	
[2:26:01 PM] John Davis: Hello, how can I help you?	
[2:27:05 PM] Avril Mai: My credit card was rejected.	1
[2:27:25 PM] John Davis: I can help you with that.	
[2:29:45 PM] Party 'Kate Lewis' has left the session	

Voice Interaction window showing that the calling agent has left the conference, but you remain connected to the contact

- 3. Click End the Chat to terminate your connection to the conference. The Interaction Workspace Chat Interaction window is updated to display the status of the conference as Ended. If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the Disposition Code drop-down list or radio-button list in the Disposition Code view (see Assigning Disposition Codes).
- 4. Click Done.
- 5. Close the Chat Interaction window.
- 6. Complete your after-call work.
- 7. Set your status to Ready.

#### End

### Starting a Chat Conference with an Active Consultation

The following procedure demonstrates how to conference a chat interaction to a party with whom you are in a chat consultation; however, it is also possible to conference from other types of consultations, such as voice, by following the same steps that are presented in the procedure.

#### Lesson: Starting a chat conference with an active consultation

#### **Purpose:**

• To conference the chat with an internal target with whom you are currently engaged in an active consultation.

#### **Prerequisites**

- You are logged in to Interaction Workspace (see Lesson: Logging in to Interaction Workspace).
- You have an active interaction with a contact (see Lesson: Handling an inbound chat interaction).

#### Start

1. In the active Chat Interaction window, click the Start Consultation button and then use the Team Communicator (see the Finding an internal target for a chat consultation in the active Chat Interaction window figure) to find the internal target with whom you want to start a consultation (see the Lesson:

Using the Team Communicator feature to find an internal target).

👻 Avril Mai 🤤 Conr	ected	đ	
💂 🔤 - 🔂 - 🗐	<b>%</b>		
[6:39:51 PM] system	John		×
[6:39:54 PM] New pa [6:40:17 PM] Kate L	🔒 😭 📀 (Agent	•	
[6:40:53 PM] Avril M purchase. [6:42:01 PM] Kate L	ready		8
	John Davis SIP		

Finding an internal target for a chat consultation in the active Chat Interaction window

 Click the Action menu drop-down list that is displayed next to the name of the internal target with whom you want to consult, and then select Start Chat Consultation (see the Team Communicator displaying a list of available consultation media figure). An interaction notification is displayed on the desktop of your target.



Team Communicator displaying a list of available consultation media

The chat consultation interaction is added to your active chat interaction window (see the Chat Interaction window displaying an active chat interaction and a chat consultation figure).

Avril Mai - External - Interaction Workspace _ [	٦X
Avril Mai 😑 (00:04:23)	
Case Information	1
Origin: Inbound chat	DONTA
	9
💂 🗣 🖏 : 🕺	
[6:39:51 PM] system: agent will be with you shortly [6:39:54 PM] New party 'Kate Lewis' has joined the session [6:40:53 PM] Kate Lewis: Hello! [6:40:53 PM] Avril Mai: Hellow, I need help with my on line purchase. [6:42:01 PM] Kate Lewis: Yes. L can help you!	
[0:42:01 PH] Kate Lewis: res, I can nep you?	
Send Visposition Code Note	
	•
Save	RESPON
Consultation: John Davis 🕒 (00:01:14)	ISES
▼ John Davis 🥥 Connected	
🙀 End 👃	
[6:43:01 PM] New party 'John Davis' has joined the session [6:43:48 PM] Kate Lewis: Hello John, can you assist my contact? [6:44:08 PM] John Davis: Yes, please start a conference.	
Send	

Chat Interaction window displaying an active chat interaction and a chat consultation  $% \left( {{{\rm{ch}}_{\rm{c}}}} \right)$ 

3. To transition your active chat consultation to a chat conference, click the Instant Chat Conference button on the main interaction toolbar (see the Team Communicator displaying the list of active consultations figure). The Team Communicator opens and displays your active consultations (see the Team Communicator displaying the list of active consultations figure).

▼ Avril Ma	i 🤤 Connected	14
😦 🤜 -	©• . <mark>%</mark> • .	
[6:39:51 P		P
[6:39:54 P [6:40:17 P	🔒 🚖 🕑 Agent 🔹	
[6:40:53 P	Active Consultations	
[6:42:01 P	👘 👻 John Davis 🕕 Conditionally Ready	<u>@</u>

Team Communicator displaying the list of active consultations

4. Click the Instant Chat Conference button in the Action menu that is next to the name of the consult

party with whom you want to conference with your chat interaction (see the Team Communicator displaying the Instant Chat Conference option figure).

👻 Avril Mai	Connected	5
😦 📮 (	©• , <mark>%</mark> • ,	
[6:39:51 P	Type name or number	Q
[6:39:54 P [6:40:17 P	🛃 🚖 📀 Agent	• 🖪
[6:40:53 P	Active Consultations	
[6:42:01 P	📢 👻 John Davis 🕕 Conditionally Ready	2
Ē	Instant Chat Conference	Send
	👍 Add to Favorites	-

Team Communicator displaying the Instant Chat Conference option

An invitation to join the chat is sent to your conference target. If the target accepts the invitation, the consultation chat ends (see the Status of the chat consultation interaction after the consultation party has been conferenced to a chat interaction figure) and the target is conferenced with you and your contact (seethe Status of the chat consultation interaction after the consultation party has been conferenced to a chat interaction figure).

Disposition Code Note	
Conferenced on 3/14/2011 6:45:03 PM by Kate -	▲ RESP
Sa	ve
Consultation: John Davis 😅 (00:02:37)	•
🔻 John Davis 🤤 Ended	
😂 Done 💡	
[6:43:01 PM] New party 'John Davis' has joined the session [6:43:48 PM] Kate Lewis: Helio John, can you assist my contact? [5:44:08 PM] John Davis: You please start a conference	
[6:45:03 PM] Party 'John Davis' has left the session	

Status of the chat consultation interaction after the consultation party has been conferenced to a chat interaction



The Chat Interaction window displaying an active chat interaction with a conferenced party that was transitioned from a chat consultation.

5. Complete your chat conference (see Lesson: Starting an instant chat conference).

End