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Workspace Desktop Edition User's Guide

Handle A Voice Call

Handle A Voice Call

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 - [1.1 Receiving a Voice Interaction](#)
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In this lesson, you will learn how to accept an inbound voice interaction by using Interaction Workspace. Also, you will learn how to use the Team Communicator feature to call a contact or an internal target. The Team Communicator enables you to find a contact or an internal target, send an Instant Message (IM) to an internal target, call a contact or an internal target, e-mail a contact, initiate a conference call, or transfer a call. This chapter contains the following sections:

- [Receiving a Voice Interaction](#)
- [Making a Voice Call](#)

Note: Refer to [Handle Outbound-Campaign Voice Interactions](#), to use the Voice interaction view to handle Outbound Campaign calls.

Receiving a Voice Interaction

If you are the selected internal target for an inbound interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it (answer it), the interaction window is displayed. The interaction window contains information about the call and the controls that you need to complete the interaction.

Lesson: Handling an inbound voice interaction

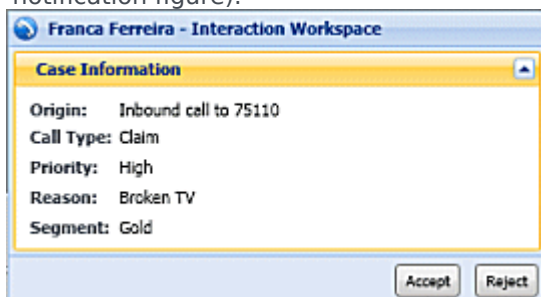
- To handle an inbound voice interaction properly.

Prerequisites

- You are logged in to Interaction Workspace (see [Getting Started](#)).
- Your status is Ready for the voice-media channel (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).
- You are the internal target for the inbound interaction.

Start

1. Your hard phone or soft phone rings, and a preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Voice Interaction Preview interactive notification figure).



Voice Interaction Preview interactive notification

The Interaction Preview contains a summary of call information, including contact information and call metrics. The Interaction Preview might also contain Case Information, which is part of the case data regarding the call.

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
 - Click Accept to answer the interaction.
 - Click Reject to return the interaction to the queue.
 - Do nothing. The interaction will time-out and be redirected.
3. If you accept the interaction, the call is answered in your hard phone or soft phone, and the Voice Interaction window is displayed (see the Voice Interaction window figure).

Voice Interaction window

4. You can use the Voice Interaction window to do the following:
 - View contact records. See [Lesson: Finding and viewing an interaction in the contact database](#).
 - View contact history. See [Managing Contact History](#).
 - Launch the Team Communicator. See [Starting a Voice Conference](#), [Transferring a Voice Call](#), and [Blending a voice consultation with an IM consultation](#).
 - Set a disposition code. See [Assigning Disposition Codes](#).
 - Use the Notepad to add information about the interaction to the interaction history. See [Managing Contact History](#).
 - View and edit the case information for the interaction. See [Managing Contact History](#).
 - Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the

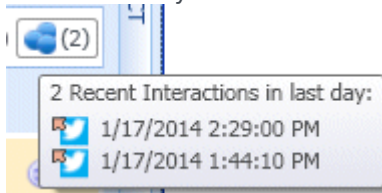
Case Information view. The hyperlink might be a URL or highlighted anchor text.

5. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see the Dynamic Contact History Matrix displaying the number and type of interactions in progress for the current contact figure). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.



Dynamic Contact History Matrix displaying the number and type of interactions in progress for the current contact

6. You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Recent interactions matrix displaying the list of interactions with the current contact within the last day figure). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



Recent interactions matrix displaying the list of interactions with the current contact within the last day

Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.

7. If you connect with the contact successfully, you can do any of the following:
 - Terminate the call (see Step 6).
 - Put the call on hold and retrieve the call. The call status changes to On Hold, and then back to Connected when you retrieve the call.
 - Use the keypad to send DTMF to the contact.
 - Start a voice or IM consultation.
 - Conference the call (see [Starting a Voice Conference](#)).
 - Transfer the call (see [Transferring a Voice Call](#)).
 - View and read standard responses (see [Lesson: Using The Standard Response Library](#)).
 - For SIP enabled agents, additional call actions are available:
 - Record the call (see [Lesson: Record Interactions](#)).
 - Mute and unmute the call.
 - Adjust the microphone and speaker volumes.

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

- When the interaction is complete, either you or the contact can end the call. If you want to terminate the call, click the End Call button.
- 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 [Disposition Codes Assigning Disposition Codes](#)).
- Click Mark Done.
- If the Voice Interaction window does not close automatically, close the Voice Interaction window after you have clicked Mark Done for each of the active interactions.
- Complete your after-call work.

End

Next Steps

- Set your status to Ready. See [Lesson: Going Ready in the Interaction Workspace Main window](#).

Lesson: Dealing with a stuck interaction

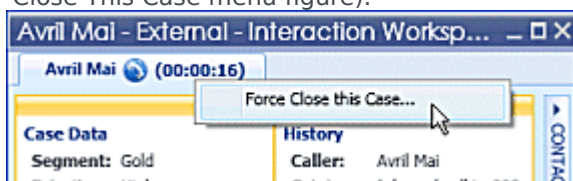
- To close the Interaction window if the interaction has become stuck in the system.

Prerequisites

- You are logged in to Interaction Workspace (see [Getting Started](#)).
- You are unable to close the Interaction window because the interaction has become stuck in the system

Start

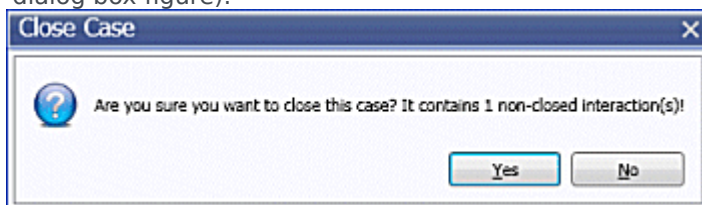
- If you are unable to close the Interaction window because the interaction has become stuck in the system, right-click the tab in the Interaction window that represents the interaction (see the Force Close This Case menu figure).



Force Close This Case menu

Select Force Close This Case from the pop-up menu.

- In the Close Case dialog box, confirm that you want to force-close the interaction (see the Close Case dialog box figure):



Close Case dialog box

- Click Yes to force-close the case. The Interaction window closes. The status of the interaction remains as In Progress in the history until you mark it as Done.
- Click No to cancel the action and return to the Interaction window.

3. Complete your after-call work.

End

Making a Voice Call

Interaction Workspace enables you to call either an internal target or a contact after you find the target/contact in your company directory by using the Team Communicator feature of the Interaction Workspace Main Window or the Interaction Workspace Gadget.

Note: Refer to [Handle Outbound-Campaign Voice Interactions](#) to use the Voice interaction view to handle Outbound Campaign calls.

This section contains the following lessons:

- [Lesson: Calling an internal target](#)
- [Lesson: Calling a contact](#)
- [Lesson: Directly dialing a contact](#)

Lesson: Calling an internal target

- To make a voice interaction with an internal target.

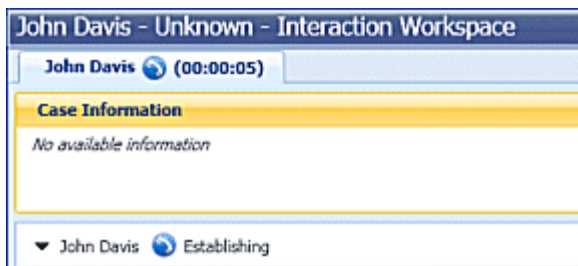
The Voice Interaction window enables you to view all the information that is necessary to handle a voice interaction with an internal agent. The window contains tabs that enable you to handle more than one interaction simultaneously. The information that is displayed to you in this view depends on your assigned role and the case information that is available about the internal target.

Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have found the internal target and have selected an Internal Voice Interaction (see [Lesson: Using the Team Communicator feature to find an internal target](#)).

Start

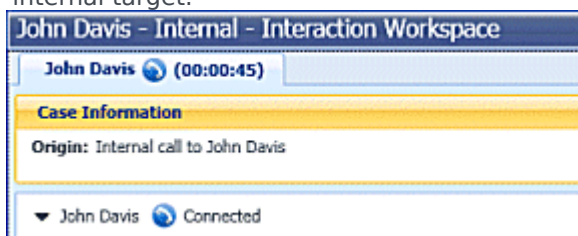
1. When you choose to call an internal target (see [Lesson: Using the Team Communicator feature to find an internal target](#)), the Voice Interaction window opens. The status is Establishing (see the Voice Interaction window displaying status as Establishing figure)



Voice Interaction window displaying status as Establishing

Wait for the internal target to accept your invitation.

2. If the internal target accepts your invitation, the status in the Interaction window changes to Connected (see the Voice Interaction window displaying status as Connected figure). You are now connected to the internal target.



Voice Interaction window displaying status as Connected

If the internal target rejects or fails to accept your invitation, then the call status changes to Ended. To try to call the internal target again or to call a different internal target, repeat Step 1.

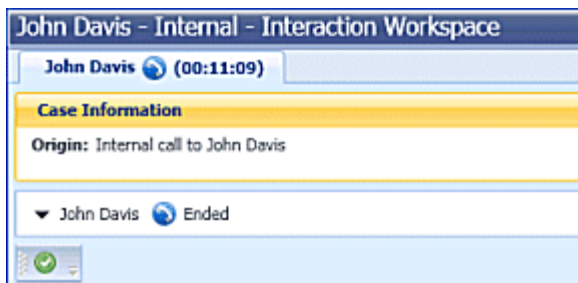
Note: You can click the Team Communicator My Recents button to try to call the internal target again. For more information, see the *Interaction Workspace 8.1 Help*.

3. If you successfully connect with the internal target you can do one of the following:
 - Terminate the call (see Step 4).
 - Put the call on hold, and then resume the call. The call status changes to On Hold when you put the call on hold, and then back to Connected when you resume the call.
 - Use the keypad to send DTMF to the internal target.
 - Start a voice or IM consultation.
 - Conference the call (see [Starting a Voice Conference](#)).
 - Transfer the call (see [Transferring a Voice Call](#)).
 - For SIP-enabled agents, additional call actions are available:
 - Record the call (see [Lesson: Record Interactions](#)).
 - Mute and unmute the call
 - Adjust the microphone and speaker volumes

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

4. When you have finished speaking with the internal target you can terminate the call or wait for the internal target to terminate the call.

If you want to terminate the call, click the End Call button. The call status changes to Ended, and the call is released (see the Voice Interaction window displaying status as Ended figure).



Voice Interaction window displaying status as Ended

5. After a call is released, one or more of the following actions might be available to you, depending on your assigned role or the configuration of your system:
 - Click Mark Done to close the Interaction window.
 - Select a disposition (call outcome).

Note: Your system might be configured so that you cannot click Mark Done until you have selected a disposition code. See [Assigning Disposition Codes](#) for more information about Disposition Codes. After a call has been released and you have completed any required post-call tasks, the Voice Interaction window closes.

End

Lesson: Calling a contact

- To make a voice interaction with a contact.

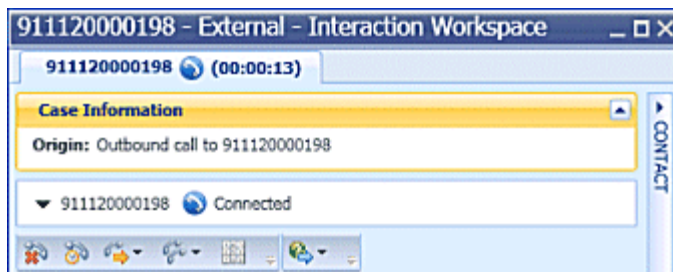
When you choose to call a contact, the Voice Interaction window is displayed. It enables you to view all the information that is necessary to handle a voice interaction with a contact. The information that is contained in this view depends on your assigned role and the case information that is available about the contact.

Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have found the contact and have selected an External Voice Interaction (see [Lesson: Using the Team Communicator feature to find a contact](#)).

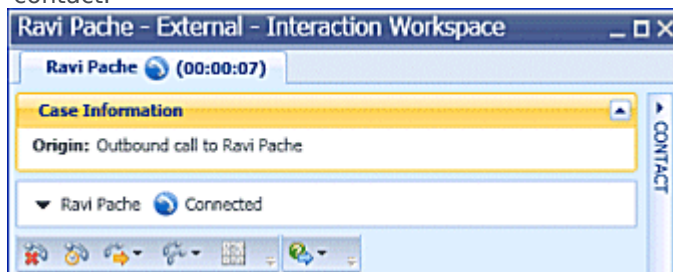
Start

1. When you choose to call a contact (see [Lesson: Using the Team Communicator feature to find a contact](#)), the Voice Interaction window is displayed. The Status is Establishing (see the Voice Interaction window displaying status as Establishing figure). Wait for the contact to accept your invitation.



Voice Interaction window displaying status as Establishing

2. If the contact accepts your invitation, the status in the Voice Interaction window changes to Connected (see the Voice Interaction window displaying status as Connected figure). You can now talk to the contact.



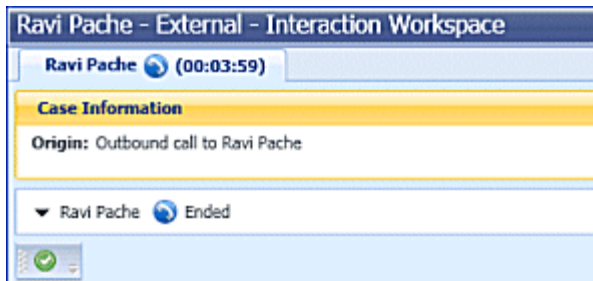
Voice Interaction window displaying status as Connected

If the contact rejects or fails to accept your invitation, the call status changes to Ended (see Step 1).

3. If you connect with the contact successfully, you can do one of the following:
 - Terminate the call (see Step 4).
 - Put the call on hold and retrieve the call. The call status changes to On Hold, and then back to Connected when you retrieve the call.
 - Use the keypad to send DTMF to the contact.
 - Start a voice or IM consultation.
 - Conference the call (see [Starting a Voice Conference](#)).
 - Transfer the call (see [Transferring a Voice Call](#)).
 - For SIP-enabled agents, additional call actions are available:
 - Record the call (see [Lesson: Record Interactions](#)).
 - Mute and unmute the call.
 - Adjust the microphone and speaker volumes.

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

4. When you have finished talking to the contact you can terminate the call or wait for the contact to terminate the call. If you want to terminate the call, click the End Call button. The call status changes to Ended, and the call is released (see the Voice Interaction window displaying status as Ended figure).



Voice Interaction window displaying status as Ended

5. After a call is released, one or more of the following actions might be available to you, depending on your assigned role:
 - Click Mark Done to close the Interaction window.
 - Select a disposition (call outcome).

Note: Your system might be configured so that you cannot click Mark Done until you have selected a disposition code. See [Assigning Disposition Codes](#) for more information about Disposition Codes. After a call has been released and you have completed any required post-call tasks, the Voice Interaction window closes.

End

Lesson: Directly dialing a contact

- To make a voice interaction with a contact by directly dialing a phone number.

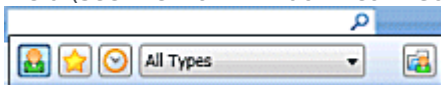
When you choose to call a contact, the Voice Interaction window is displayed. It enables you to view all the information that is necessary to handle a voice interaction with a contact. The information that is contained in this view depends on your assigned role and the case information that is available about the contact.

Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have the number of the party that you want to call.
- You have found the contact and have selected an External Voice Interaction (see [Lesson: Using the Team Communicator feature to find a contact](#)).

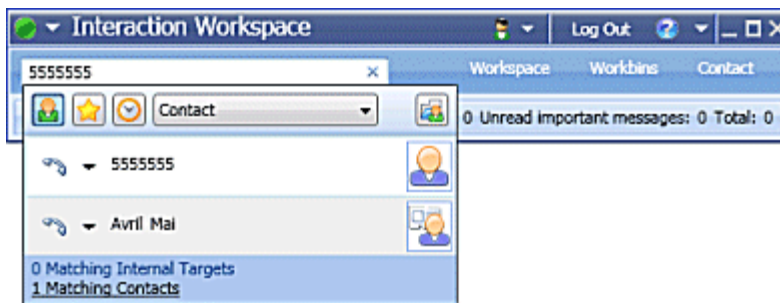
Start

1. In the Main Window, Gadget, or an interaction window, click in the Team Communicator Quick Search field (see the Main Window Team Communicator control and Quick Search field figure).



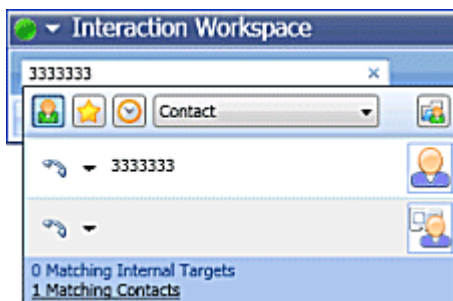
Main Window Team Communicator control and Quick Search field

2. Enter the telephone number that you want to directly dial (see the Team Communicator displaying a directly dialed number figure).



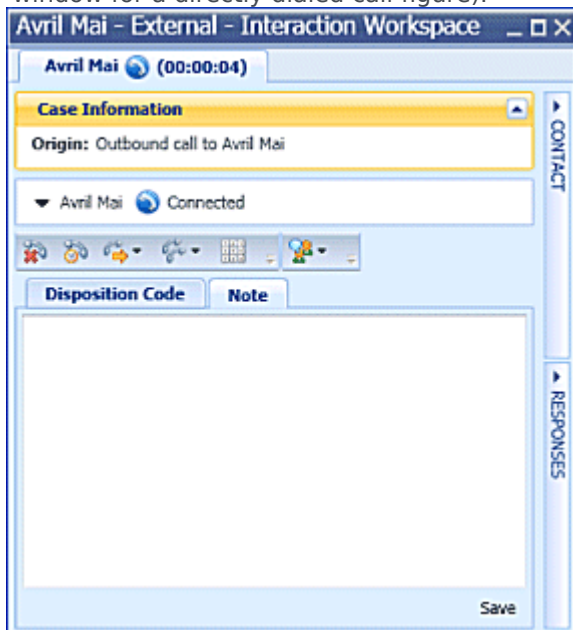
Team Communicator displaying a directly dialed number

As you enter text, Interaction Workspace searches the internal and contact database and lists potential matches (see the Team Communicator displaying an unknown directly dialed number figure).



Team Communicator displaying an unknown directly dialed number

3. To dial the number, click the phone icon that is next to the number that you entered in the Action menu. If the party is reached, the Voice Interaction window is displayed (see the Voice Interaction window for a directly dialed call figure).



Voice Interaction window for a directly dialed call

4. Handle and complete your call (see [Lesson: Calling a contact](#)).

End