Workspace Desktop Edition Help

Chat Consultation

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Chat Consultation

The chat consultation functionality enables you to consult with an internal target about the current chat interaction without initiating a *conference* with the internal target.

To invite another party to consult with you about your chat session:

1. Click the **Start Consultation** () button. The Team Communicator is displayed.

2. Choose a consultation target. To consult with an agent group or skill, choose the name of the skill or group, and an available agent with that skill or in that group or interaction queue is notified of your consultation request.

3. Select **Start Chat Consultation** from the **Action** menu.
   An invitation is sent to the target.
   If the target accepts the invitation, a new chat interaction with the target is added to your Chat Interaction window, below your first interaction.
   If the target rejects the invitation, a system message is displayed at the top of the Chat Interaction window to inform you that the conference invitation has been rejected.

4. Either you or your target can end the chat consultation. Ending the chat consultation does not end your chat interaction with your contact.

Use the new chat interaction to send chat messages to your target without your contact seeing what you type or what your target responds.

The target sees the chat transcript between you and your contact.

If you click **End** () to end the session with your contact, the session with your consultation target also ends.

Both you and your target must click **Mark Done** () to close the interaction.

Note: If you have a pending response, and the Chat Interaction window is not the active window, it begins to flash in the Windows taskbar, regardless of the condition that is displayed by the pending-response indicator.

You can also launch an Instant Messaging (IM) session or voice call with another agent to consult about the chat session.

You can transition your chat, IM, or voice consultation into a transfer to or conference with your consultation target.

Transfer to Consultation Target

You can transfer your active chat interaction to your consultation target.

1. Click the **Instant Chat Transfer** () button. The Team Communicator is displayed.

2. Under Active Consultations, choose the active consultation target as your transfer target.

3. In the **Action** menu, select **Instant Chat Transfer**.

The contact is connected to the transfer target, and the Chat Interaction window on your desktop closes.

Conference with Consultation Target

You can conference your active chat interaction to your consultation target.

1. Click the **Instant Chat Conference** (⬚) button. The Team Communicator is displayed.

2. Under **Active Consultations**, choose the active consultation target as your conference target.

3. In the **Action** menu, select **Instant Chat Conference**.

The consultation target is added to your chat interaction. The Chat Interaction window displays the entire transcript of the chat session between you and the contact.

You, the contact, and the consultation target can each see the messages that are sent by the others.

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

During the chat conference, you can perform the following actions:

- In the **Action** menu next to the name of the connected party, you can choose **Delete From Conference** to remove the party from the conference.

- Click **End** (⬚) to end the session with your contact—the session between your consultation target and the contact continues.