Workspace Desktop Edition Help

Internal IM

4/2/2025

Contents

Internal IM

This feature enables you to send an Instant Message (IM) to another agent (internal target) or receive an IM from an internal target. If you start the IM from an active Voice Interaction, you can share contact information with the IM target. You can transition from an IM consultation session to a voice consultation.

Note: You must be configured to use Internal Instant Messaging.

Sending an IM

Use the Team Communicator on your Main Window view or your Gadget view to find the internal target with whom you want to start an IM session.

In the Internal Target **Action** menu, select **Send an Instant Message <*target name*>**.

The IM session is started in the Interaction window. The target is presented with an interactive notification that enables them to accept or reject your invitation to start an Instant Messaging session. You are notified if the target accepts, rejects, or lets your invitation time-out.

The tab at the top of the Interaction window indicates the agent logon of the internal target with whom you are in an IM session.

The Status indicator displays the agent logon of the internal target with whom you are in an IM session and the status of the session. The status is either Connected or Ended.

The large text field contains a transcript of the IM session. Your logon and the logon of the Internal target are displayed above the messages in different colors to enable you to determine who is writing. Each entry is marked with a timestamp. The logons appear above the text that the participant entered.

Enter your message in the field next to the **Send** button. Click **Send** or press the **Enter** key on your keyboard to send your message to the internal target.

When your session is complete, click **End Session** ( ) to disconnect the IM session.

Click the **Mark Done** button ( ) to close the IM session window.

Receiving an IM

If another agent wants to start an Instant Message session with you, the other agent selects your name from the Team Communicator and then selects **Send an Instant Message** from the **Action** menu.

An interactive notification is displayed above the system tray and the interaction window is

minimized in your task bar.

Click **Accept** to display the new IM interaction in your Interaction window. Click **Reject** to refuse the IM interaction. If you do not click Accept or Reject, the interactive notification is dismissed, but the pending IM interaction remains in your task bar until you display it.

The tab at the top of the Interaction window indicates the agent logon of the internal caller with whom you are in an IM session.

The Status indicator displays the agent logon of the internal caller with whom you are in an IM session and the status of the session. The status is either Connected or Ended.

The large text field contains a transcript of the IM session. Your logon and the logon of the Internal caller are displayed above the messages in different colors to enable you to determine who is writing. Each entry is marked with a timestamp. The logons appear above the text that the participant entered.

Enter your message in the field next to the **Send** button. Click **Send** or press the **Enter** key on your keyboard to send your message to the internal target.

When your session is complete, click **End Session** ( ) to disconnect the IM session.

Click the **Mark Done** button ( ) to close the IM session window.

Starting an IM Consultation from an Active Interaction

To start an IM consultation from an active interaction, such as voice, e-mail, or chat, perform the following steps:

1. Click **Start Consultation** ( ) to open the Team Communicator on your active Interaction view to find the internal target with whom you want to start an IM session.
2. In the internal target **Action** menu, select **Start Instant Message Consultation**.
    A new Internal IM message window is displayed that has the status **Not Connected**.
3. To initiate an Internal IM session, enter a message and click **Send**. To cancel the IM session, click the **Mark Done** button ( ).

If you sent a message, the internal target receives an interactive notification of your instant message that includes your initial message.

If the internal target accepts your invitation, you and the target are engaged in an internal IM session. All of the Case Data about the interaction with the contact is displayed in the IM interaction window of your internal target. The Contact Information and Contact History tabs are available to enable your internal target to view information about your contact and to search the contact history database. The Information tab is read-only.

You can perform the following actions in the Consultation IM interaction window:

- Enter messages in the message field.
- Click **Send** to send the message to the internal target.

- Review the message transcript in the message transcript area.

- Click **End** Session ( ) to terminate your IM Consultation.

Transitioning an IM Consultation to a Voice Consultation

If you are engaged in a Consultation IM with an internal target that you initiated from the current voice interaction, you can transition the IM consultation to a voice consultation by performing the following steps:

1. Click **Start Consultation** ( ) to open the Team Communicator on your active Interaction view.

2. Under **Active Consultations**, choose the active consultation target as your voice consultation target. The internal target with whom you are engaged in an IM consultation is presented as the default selection unless you enter something in the search field or click any of the filter buttons.

3. Select **Start Voice Consultation** in the Team Communicator **Action** menu.

The contact is put on hold. When the internal target accepts the consultation request, you can speak to the internal target.