GENESYS™

Workspace Desktop Edition Help

Voice Consultation

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Voice Consultation

The Voice Consult functionality enables you to consult with an internal target or a contact about the current voice interaction.

During the consultation, you can transfer to the target or start a conference with the target. The target can choose not to accept your consultation, transfer, or conference request, and can choose to end the consultation. Voice consultations that are started from an active interaction enable the internal target to view case data, contact information, and history.

Consult

The Voice Interaction view enables you to start a consultation with an internal target or a contact about your current voice call.

Click the **Start a Consultation** button ( ).

Use the Team Communicator to find an internal target or a contact.

In the **Action** menu, click:

- **Start Voice Consultation**—Start a voice consultation with an internal target or a contact.

  After the consultation request is initiated, the contact or internal target is put on hold, and the consultation request call is presented to the consultation target. The **Call Status** indicators that are next to the name of the party show whether the contact or internal is on hold, and indicates when the consultation request changes from **Establishing** to **Connected**.

  Or,

- **Start Voice Consultation (Transfer)**—Initiate a voice interaction to talk to the transfer target prior to transferring the call to the internal target or another contact.

- **Start Voice Consultation (Conference)**—Initiate a voice interaction to talk to the consultation target prior to conferencing the call to the internal target or another contact.

Note: you can also choose to start an Instant Message Consultation from the **Action** menu. Click **Start Instant Message Consultation** to display the Instant Message view in the current interaction window. Send a message to send an invitation to the consultation target.

Transfer

To talk to the transfer target prior to transferring the call to the internal target or another contact, click the consultation button in the toolbar, and from the Team Communicator **Action** menu select the following option:

Start Voice Consultation (or, **Start Voice Consultation (Transfer)**, depending on the type of environment that you have).

After the consultation request is initiated, the contact or internal target is put on hold, and the call is presented to the consultation target. Look at the Call Status indicators next to the name of the party to determine whether the contact or internal is on hold and to determine when the consultation request changes from Establishing to Connected.

After your target accepts the consultation, you are connected and you and the transfer target can speak to each other. The contact remains on hold.

Completing the Transfer

To complete the transfer, click the **Instant Transfer** button (🖬) from the main voice interaction, select the consultation target from the Team Communicator, and click **Instant Call Transfer**. The contact or internal target is connected to the transfer target, and the voice-call status changes to **Ended** in the Voice Interaction view.

You can perform any of the following functions by using the Voice Consult toolbar:

- Alternate (toggle) between the contact or internal target and the transfer target by clicking **Resume Call** (🖬). The other party is put on hold until you toggle back or complete the transfer.

- End the call to the consultation target and resume the call with the Contact or internal target (🖬).

- Send dual tone multi frequency (DTMF) to the transfer target by using the DTMF keypad (🖬).

- For VoIP-/SIP-enabled agents, the following additional call actions are available: record the call, mute and unmute the call, and adjust the microphone and speaker volumes. Refer to Voice Interactions for a list of additional actions and limitations.

Once the transfer is completed, close the Voice Interaction window by clicking **Mark Done** (🖬). You might be configured to specify a disposition code before you can click **Mark Done**.

Note: You choose to change the transfer to a conference by clicking the **Instant Conference** button (🖬), selecting the consultation target from the Team Communicator, and clicking **Instant Voice Conference**. Refer to Completing the Conference.

Conference

To talk to the conference target prior to conferencing the call to the internal target or another contact, click the consultation button in the toolbar, and from the Team Communicator **Action** menu select the following option:

Start Voice Consultation (or **Start Voice Consultation (Conference)**, depending on the type of configuration that you have).

> After the consultation request is initiated, the contact or internal target is put on hold, and the call is presented to the consultation target. Look at the Call Status indicators next to the name of the party to determine whether the contact or internal is on hold and to determine when the consultation request changes from Establishing to Connected.

Completing the Conference

After your target accepts the consultation, to complete the Conference, click the **Instant Conference** button ( ), select the consultation target from the Team Communicator, and click **Instant Call Conference**. The contact or internal target is connected to the transfer target to conference the call to the target. The contact or internal target is connected to the conference target.

You can perform any of the following functions by using the Voice Consult toolbar:

- Alternate (toggle) between the contact or internal target and the conference target by clicking **Resume Call** ( ). The other party is put on hold until you toggle back or complete the conference.

- End the call to the conference target and resume the call with the Contact or internal target ( ).

- Send dual tone multi frequency (DTMF) to the conference target by using the DTMF keypad ( ).

- For VoIP-/SIP-enabled agents, the following additional call actions are available: record the call, mute and unmute the call, and adjust the microphone and speaker volumes. Refer to Voice Interactions for a list of additional actions and limitations.

Note: You can choose to change the conference to a transfer by clicking the **Instant Transfer** button ( ), selecting the consultation target from the Team Communicator, and clicking **Instant Voice Transfer**. See transfer for more information.

After the conference is established, you can perform the following actions:

- Disable and enable listening.

- Remove a party from the conference.

- Use the Notepad to attach a note to the call history.

- Complete the call by clicking **End Call** ( ).

- Close the Voice Interaction window by clicking **Mark Done** ( ). You might be configured to specify a disposition code before you can click **Mark Done**.

- For VoIP-/SIP-enabled agents, the following additional call actions are available: record the call, mute and unmute the call, and adjust the microphone and speaker volumes. Refer to Voice Interactions for a list of additional actions and limitations.

Disabling and Enabling Listening

You might be configured to disable and enable listening by parties in a conference. Click the **Party**

Action menu on the Voice Interaction view and select **Listen Disconnect** to disable listening for that party. The party can still talk, but the party cannot hear what you and the other party say. When Listen Disconnect is active for a party, a small red circle with a slash is displayed next to the party icon.

Click the **Party Action** menu on the Voice Interaction view and select **Listen Reconnect** to enable listening for that party. The party can now hear what the other two parties are saying.

Removing a Party from the Conference

You might be configured to remove a party from a conference. Click the **Party Action** menu on the Voice Interaction view and select **Delete From Conference** to remove that party from the conference. You can still talk to the party who was not removed from the conference.