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Workspace Desktop Edition Help

Chat Interaction

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Chat Interaction

[**Modified:** 8.5.115.17, 8.5.113.11, 8.5.111.21, 8.5.117.18, 8.5.121.03, 8.5.122.08, 8.5.128.07, 8.5.142.05]

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the [Related Resources](#) section at the bottom of this article.

Chat is real-time two-way communication between you and your contact through your computer.



Use the **Zoom** control in the **Main Menu** (refer to [Manage your settings and preferences](#)) to change the size of the text in this view. This feature might not be available in your environment. [**Added:** 8.5.109.16]

Chat tasks enable you to handle chat interactions with contacts and internal targets. Click the links below to learn more:

- **Chat Interaction:** Enables you to access all of the information that is necessary to handle a chat interaction with a contact.
- **Chat Consultation:** Enables you to consult with another agent about the current chat interaction. Chat consultations that are started from an active interaction enable your internal target to view case data, contact information, and history, as well as the live transcript of the communication with the external contact. The target agent can choose not to accept your consultation request. You can also transfer or conference your call from an Active Consultation to the consultation target.
- **Altocloud Chat Interaction:** Enables you to view the details of a contact's visit to your company website before and after they initiated a web chat interaction. This usually happens when your contact clicks a web chat widget, requests a quote, or requests more information.

Important

In the event that there is a problem in your contact center and connection to the servers that handle your interactions is lost, some functionality might be temporarily not available or you might lose the interaction with your contact. Workspace displays system messages that inform you about the status of each of your available media channels.

The Chat Interaction Window

[Modified: 8.5.108.11]

During a chat session, your contact enters text in a chat interface, usually on your company's website, and the text that he or she enters is displayed in the Workspace Chat interaction view. The text that your contact types appears both on your chat window and on your contact's chat window.

You can read the text that your contact sends to you, and you can respond to the contact by typing in the chat text area and clicking **Send** to send what you type to the chat interface that the contact is using. Next to your message in the transcript, a circle icon (the tooltip reads "The contact has not read this message yet."), might be displayed to indicate that the contact has not read this message yet. When the circle disappears, you know that your message has been read by the contact.

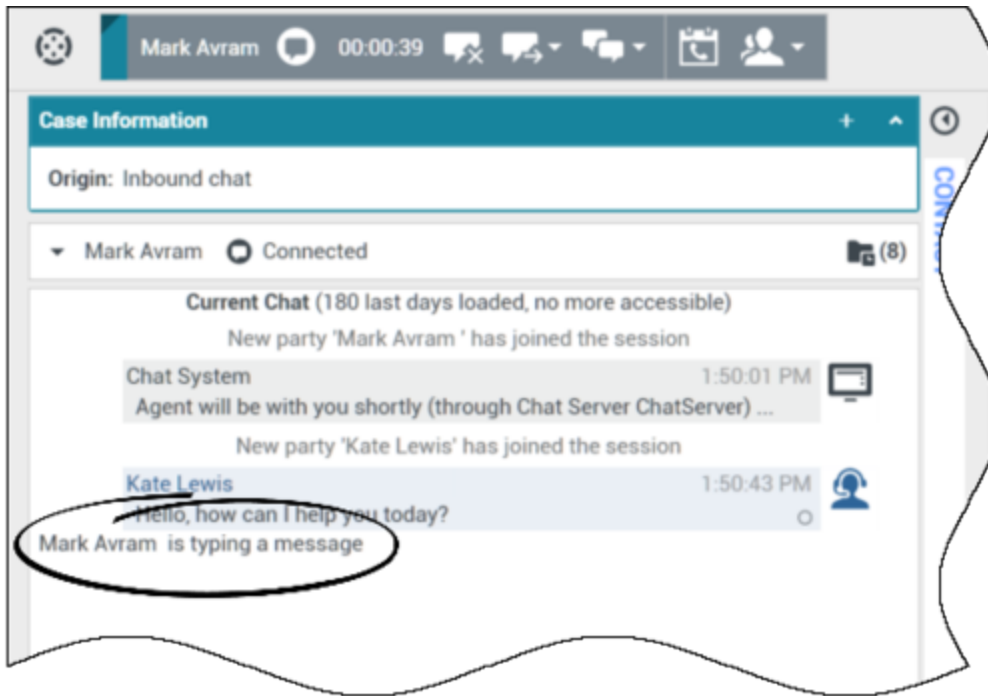


The Workspace Chat interaction interface maintains the transcript (a scrolling list of the written correspondence between you and your contact) of the chat — it might also include chat from other people in your company if you conference the chat or if the chat session is transferred to you.

Tip

The appearance of the chat transcript in your organization's environment might be different from what is shown in the screen shots in this Help document.

When your contact is typing in their chat interface, a small notice appears next to the contact's name in the chat transcript to notify you that they are typing. Your system might be configured to display what the contact is entering before they send it (refer to the following figure).



Be careful not to respond to what the contact is typing before they have sent it to you!

Tip

If you are set up to use Genesys Altocloud you can access the **Altocloud** tab. Refer to [this topic](#) to find out about Altocloud.

Why is the Chat Interaction bar flashing?

[Added: 8.5.113.11]

While your are handling a chat interaction, sometimes you change your focus to another interaction, such as a chat with a different contact, a phone call, or an email, or you might start using another application and its windows block the Workspace windows.

In these situations you might notice that the Chat Interaction bar in the Interaction Bar begins to flash yellow and that the Workspace icon in the task bar also flashes yellow.





This flashing notifies you that something has changed. Here are some of the reasons that the chat interaction might flash in the Interaction Bar:

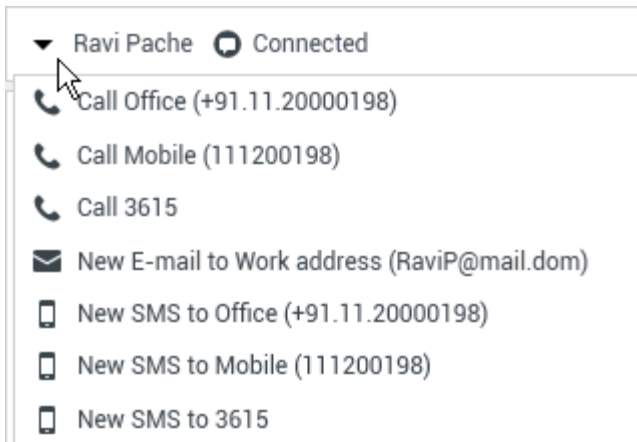
- The pending response has reached the warning stage.
- Another agent has joined or left the chat (such as your supervisor or someone involved in a consultation).
- The contact has left the chat.



- The chat session is about to timeout due to inactivity by you and your contact.
- The chat session has timed out due to inactivity by you and your contact.
- The chat session is about to close because the contact has disconnected. Your administrator might specify that chat interactions close automatically after a contact disconnects. They might also specify a timer before the chat closes to let you finish after call work. Once a chat closes, you cannot add a **disposition** or a **note**. **[Added: 8.5.128.07]**

Chat Interaction Window Actions

The Chat Interaction window enables you to handle many chat-related tasks, which include the following:

- **Send a response** to the contact.
 - View the Chat response pending indicator () that enables you to determine when a response from you is **pending**.
 - **Push** one or more URLs to your contact (open web pages automatically on the contact's desktop).
 - **Receive files and images** from your contact. **[Added: 8.5.115.17]**
 - **Transfer files and images** to your contact. **[Added: 8.5.115.17]**
 - **Instant-transfer** the chat by clicking the **Chat Transfer** () button.
 - **Instant-conference** the chat by clicking the **Chat Instant Conference** () button.
 - Select **Done** for the current interaction.
 - Set a **disposition code**.
 - Use the **Note** to attach a note to the interaction history.
 - View **Case Data** (attached data) for the current interaction.
 - Start a consultation:
 - **Voice** (internal targets and contacts).
 - **IM** (an internal target only).
 - **Chat** (an internal target only).
 - **Call** the sender, if there is a phone number in the contact database. You can also click a phone number in the Chat transcript to launch a call.
 - **Email** the sender, if there is an email address in the contact database. You can also click an email address in the Chat transcript to launch an email message.
 - Schedule a Callback by clicking the **Schedule Callback** () button to open the **New Callback** dialog box. Refer to **Genesys Callback**. **[Added: 8.5.111.21]**
 - Blend the interaction with other media (such as email, voice, and SMS) by using the **Party Actions** menu.
-



- View and manage [contact history](#).
- View and manage [contact information](#). Your account might be configured to let you assign an interaction with an unknown contact to a known contact in the contact database by using the [Manual Contact Assignment](#) feature [**Modified:** 8.5.117.18].
- Hide or display the controls and information about the current interaction by clicking the collapse/expand **Interaction View** button:
 - **Collapse:** 
 - **Expand:** 
- Use a [standard response](#).

Handling a Chat Interaction



When you accept a chat interaction, the **Chat Interaction** window is displayed.



The name of the contact and the elapsed time of the interaction are displayed in the **Chat Interaction** bar.

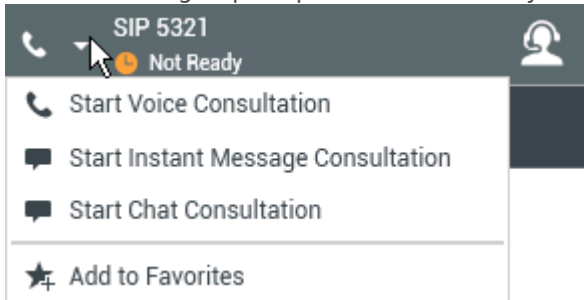
Connection-status information is displayed next to the Party Action menu. Use the Party Action menu to call the contact if the contact's phone number is available from your contact database.


If there are [in-progress or recent interactions](#) for the current contact, the number of interactions is displayed beside the connection status of the interaction.

The **Chat Toolbar** enables you to perform the following actions:

- **End Chat:** Click **End Chat** () to stop the current chat interaction.
- **Instant Chat Transfer:** Click **Instant Chat Transfer** () to redirect ([transfer](#)) the current chat interaction to an internal target by using the [Team Communicator](#).

- **Instant Chat Conference:** Click **Instant Chat Conference** () to share (**conference**) the current chat interaction with an internal target by using the **Team Communicator**. To conference with an agent group, a skill, or an interaction queue, enter the name of the skill, group, or queue, and an available agent with that skill or in that group or queue is notified of your conference request.
- **Consultation:** Click **Start Consultation** () to start an **IM**, **voice**, or **chat** consultation with an internal target or a contact by using the **Team Communicator**. To consult with an agent group, a skill, or an interaction queue, choose the name of the skill, group, or queue, and an available agent with that skill or in that group or queue is notified of your consultation request.



- **Mark Done:** Complete a chat session and close the Chat Interaction window by clicking **Mark Done** () for the current interaction. You might be configured to specify a disposition code before you can click **Mark Done**. The **Mark Done** button is displayed after the Chat interaction is ended.

Chat Transcript Area

The Chat Transcript area displays the contents of the chat messages that you exchange with your contact as well as system information, such as the names of participants as they join and leave the chat session, and the time of each event and message. System and message content is color-coded by participant, to enable you to distinguish the owner of each message visually. You can select and copy text from the chat transcript.

Your account might be configured to have a nickname (pseudonym) displayed as your participant name instead of your real name or your user name. A nickname might be a generic name for all agents in your group, or it might be a unique identifier for you. If you are configured to have a nickname, your nickname is displayed to the contact in the contact's chat transcript and in your chat transcript.

Tip

After a certain period of inactivity, your chat session might timeout and the interaction will be ended by the system. Messages about the timeout are displayed in the transcript area and might be saved as part of the chat in the **interaction history**. [Added: 8.5.115.17]

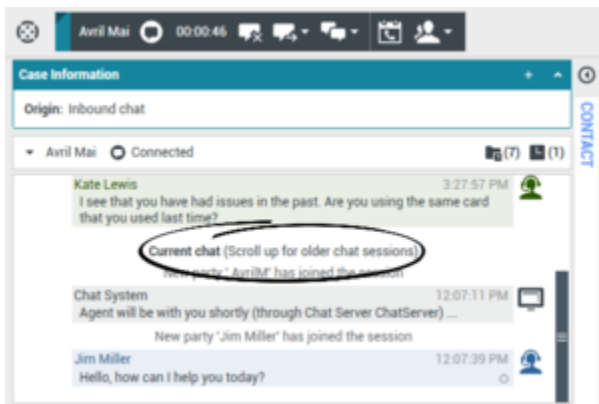
Chat History

[Added: 8.5.122.08]

Sometimes while you are chatting with a contact, you want to view earlier chat interactions with the contact, particularly if you are working on an ongoing issue with the contact. For example, sometimes a contact might disconnect from a chat interaction because the chat timed out or they lost connection on their device before the session was complete. When they reconnect, it is important to have the earlier session for reference so that you do not ask for information that they have already provided.

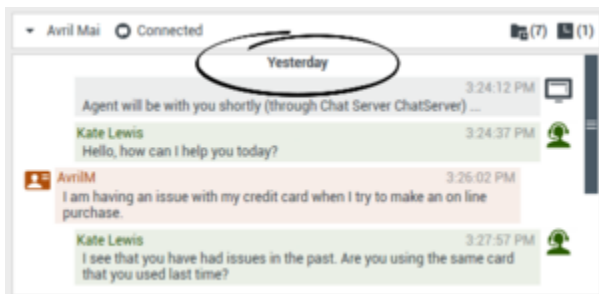
You can access the entire history of interactions with a contact by clicking the History tab in the **Contact Information and History** view of the interaction window.

Your account might be configured so that older chat interactions with the contact are displayed, in chronological order, directly above the current chat interaction. If your account is set up for this feature, in the transcript there will be text above the current chat session indicating where the current chat begins and a message informing you that to access older chat sessions you must scroll up. It might take a few seconds for older chat sessions to load and be displayed in the chat transcript.



Current Chat notification.

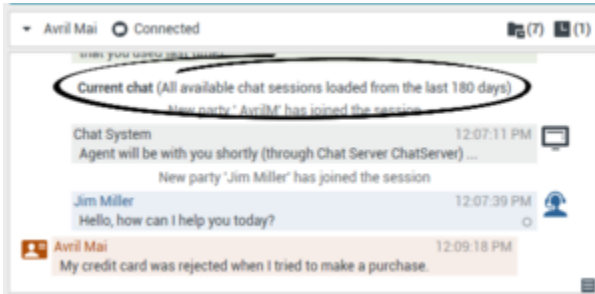
When you scroll up, each older chat session is divided by a day, for example **Yesterday** or **November 29**, to make it easier for you to find a specific session.



Older Chat notification.

Once all the older chat sessions have loaded a notice is displayed informing you from how long ago

older chat sessions are available.



Older Chat notification after all old chats have loaded.

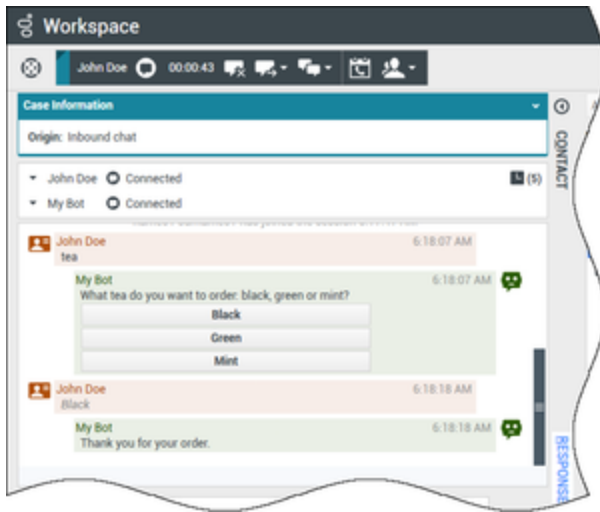
Chat Bot Rich Media messages

[Added: 8.5.142.05] In some Genesys Environments chat bots might be used to automatically interact with your organization's contacts. Chat bots are programs that send information to contacts through a chat widget when a contact visits your organization's website. Chat bots often handle the initial exchange with a contact to determine whether or not the chat should be redirected to a live agent as a new Chat interaction. Chat bots might also participate in an active chat session. Chat bots can use Rich Media such as Quick Replies and Offer templates. Offer templates can include images or video organized as a list, a selection list, or a carousel. Offer templates might leverage Mark Down capabilities to enhance the appearance of the chat bot message.

To help you know what the contact typed or which selections from Rich Media they might have made while interacting with the chat bot, the transcript of the interaction between the contact and the chat bot is included in that transcript when you accept a Chat interaction that was initiated through a chat bot. You cannot interact with the Rich Media or make selections yourself. This section gives you an idea of what to expect from a chat bot transcript. Use the transcript to know what the contact is looking for so that you do not have to repeat the questions that were asked by the chat bot.

Quick Replies

Chat bots might present your contact with a set of "quick reply" buttons that let the contact choose a reply rather than typing a reply. The chat transcript will contain the standard question posed by the chat bot and the text of the quick reply button clicked by the contact. Click the image to review an example of a quick reply.



n example of a quick reply.

The bot presented the contact with three options for ordering tea, **Black**, **Green**, and **Mint**. The contact selected **Black**.

Contact actions

Chat bots can display descriptive text, pictures, videos, selection lists, and selection buttons, such as **Buy now**, to contacts. If your company uses offer/information templates to enable contact actions, such as clicking a button or selecting an item from a list, the chat transcript will contain the content that was presented to the contact along with text telling you what the contact did. For example, if the contact clicked the **Buy now** button, the transcript might say **The contact clicked Buy now**.

When a contact clicks on a button, list item, or other element, a corresponding action is executed. For example, additional information is displayed or an order placement is initiated. Often actions might send text back to the contact. All this information and the actions taken are displayed to you.

Click the image to review an example of an offer/information template and how a contact action is displayed.



Example of an offer template.

The bot presented three different travel options with radio buttons to choose one. The contact chose **Thailand**.

If a carousel offer template was displayed to the contact, the forward and backward navigation buttons display next to the templates that enable you to page back and forth through the displayed templates. This is called a carousel template because clicking the navigation buttons simulates flipping through a carousel of images or videos. Click the image to review an example of a carousel template.

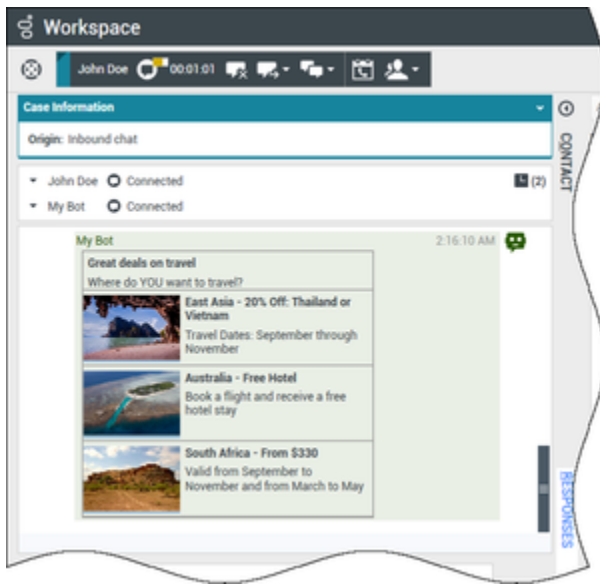


Example of a media carousel template.

In this example, the contact navigates through the carousel until they find an offer of interest. In the example image, the buttons below the video of Norway enables the contact to either get more details about the offer or book the offer immediately.

Lists

Chat bots might present your contact with a list of items, such as sales offers, that the contact can review. Some lists are for information only, others might have selections set up by your administrator. The transcript will include the list that was displayed to the contact, including any images or other media, and any selections they might have made. Click the image to review an example of a list of items presented to a contact.



Example of rich media list template.

Markdown Templates

Rich Media uses text markdown to enable your organization to format bot content. Click the image to review some of the different ways that text can be formatted for presentation to contacts.

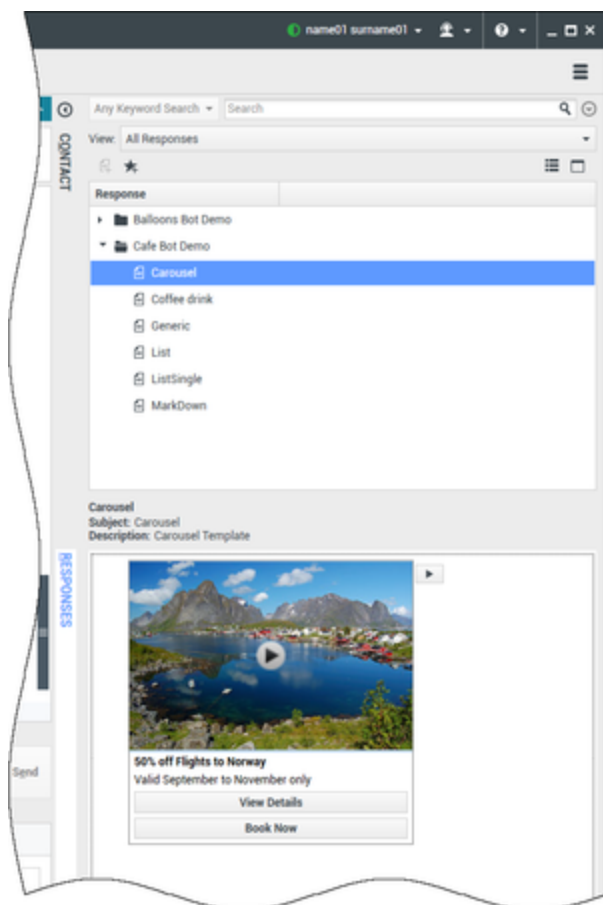


Example of a mark down template.

This example presents a display image, headings, bold text, bulleted and numbered lists, hyperlinks, and an embedded image.

Rich Media in the Responses tab

All the different rich media types can also be viewed in the **Responses** tab if your administrator sets them up. You cannot transfer Rich Media from the **Responses** tab into the chat text field. They are view-only. Click the image to review an example of a carousel template in the **Responses** tab.



Example of rich media in the Responses tab.

URLs and Security

[Added: 8.5.121.03] Sometimes URLs (links to websites) are sent to you by a contact. URLs in the Chat transcript are always displayed as the actual address. Contacts cannot send you a disguised URL in an attempt to direct you to a malicious website. You will be able to read the URL before clicking on it. If you hover your mouse pointer over the URL, a tooltip is displayed that lets you access the address.

Receive Files from Contacts

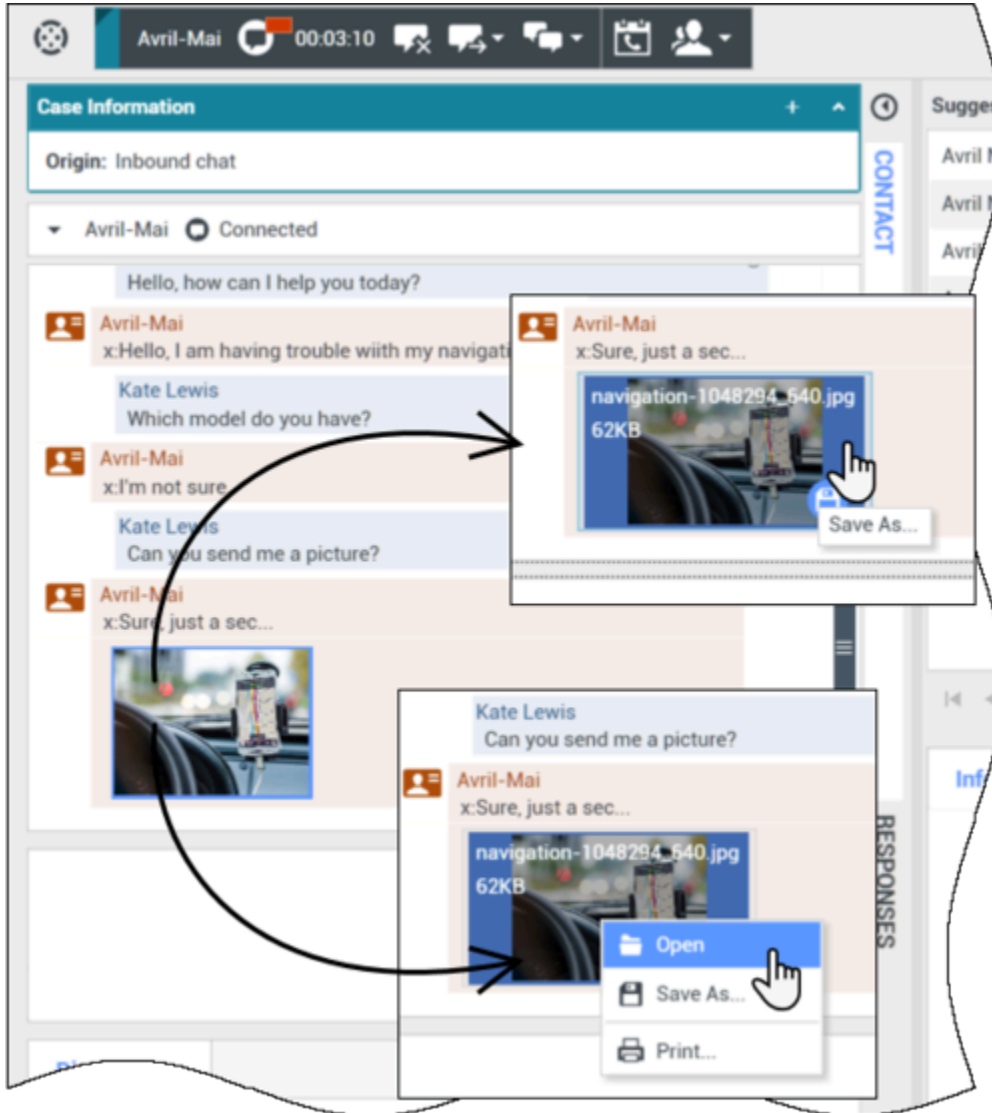
[Added: 8.5.115.17]

Your account might be set up to let you receive files, including PDFs, .doc, images, and other types, from your contact as an attachment to the chat interaction.

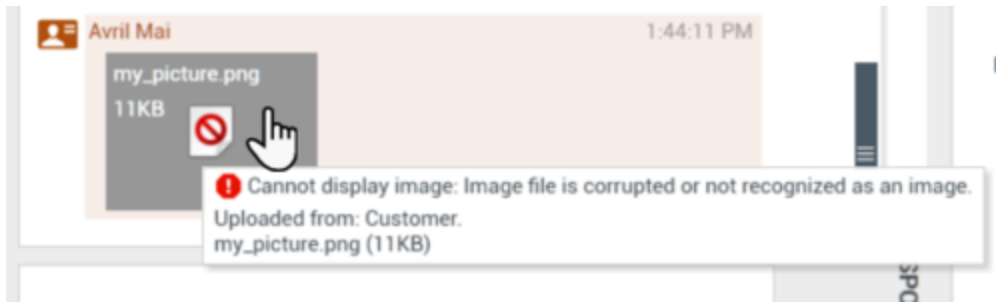
The received file is displayed as a thumbnail or as an icon that corresponds to the file type in the chat transcript.

Double-click a file icon to open the file. If you click the **Save** button you might be able to save the file to your workstation or network.

In some environments, you can right-click the thumbnail/icon to display a menu to enable you to open, save, or print the file. If more than one file has been received, you have the opportunity to save the one that you clicked, or save all (including the files that you transferred). If the file is displayed as an icon instead of a thumbnail, you can select the icon, then press **Space** to download the file.

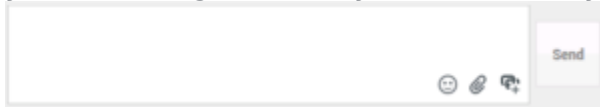


If there is a problem with the transferred file, the following **Cannot display image** icon and tooltip are displayed. You might have to ask the sender to verify that they sent the correct file and then ask him or her to resend it.



Chat Message Area

The Chat Message entry area enables you to enter, preview, and spell-check your message before you send it to your contact.



Chat message composition area.

The Chat Message entry area enables you to perform the following actions:

- Type text.
- Paste, copy, and select text by using the context menu.
- Insert and **push a URL**.
- View the standard **response** library, and insert a response in the email interaction, or automatically insert a response by typing a pre-defined **shortcut** keyword.
- Verify the **spelling** of the content of your message.
If you try to send a message that contains a misspelled word, your system might be configured to display a warning dialog box that asks you to confirm that you want to send the message without correcting the potential misspelled words. Click **Yes** to send the message anyway, or click **No** to return to the message and correct the misspelled words. [**Added:** 8.5.105.12]

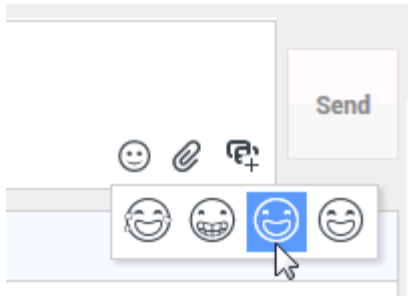
Send Emojis to Contacts

[**Added:** 8.5.115.17]

Your account might be set up to let you send emojis (*emoticons* or *smileys*) to your contact as part of the chat interaction text. Emojis are little faces and other symbols that you can use to let your contact know how you are feeling or to help them to know when something is good, funny, bad, or sad. Ask your supervisor or administrator about when to use emojis.

To add an emoji to your chat interaction:

1. Click the **Choose an emoji** button (😊) that appears next to the **Send** button to display the menu of emojis that you can send.



Example of how to choose an emoji.


2. Click an emoji.
3. Click **Send**.

Transfer Files to Contacts

[Added: 8.5.115.17]

Your account might be set up to let you send files, including PDFs, .doc, images, and other types, to your contact as an attachment to the chat interaction.

There are two possible modes that might be enabled for this feature:

1. Attach a file from your workstation or network. Click **Add Attachments**  to open the **Open File** window. Click **Send** to transfer the file. You can also drag a file to the message composition area.
2. Attach a file from the **Responses** tab. Double-click a response that contains an attachment or click **Insert Standard Response Text** to add the file as an attachment. Click **Send** to transfer the file.

Before or after you transfer the file, your account might be enabled for file actions. One or more of the following actions might be available to you:

- Save
- Save all (including files that have been transferred to you)
- Delete (remove from the list of files to be sent)
- Delete all
- Print

To perform these actions, click the filename to display a drop-down menu. If the file is displayed as an icon instead of a thumbnail, you can also select the icon and then press **Space** to download the file.

If there is a problem with the transferred file, the following icon and "File broken or not recognized as an image by file system" tooltip and tooltip are displayed. Check that you sent the correct file and then resend it.

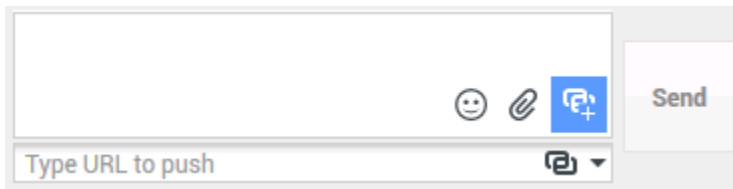


Broken file icon and tooltip.

Push a URL to a Contact

[**Modified:** 8.5.115.17]

Click the **Show the Push URL area** button (🔗+) to open the Push URL area.



Chat Push URL view.

Use this area to enter and test a URL before you push (send) it to your contact.

Type or paste a URL in the Push URL Area text field, or select a previously sent URL by selecting it from the drop-down list.

To verify that the URL is correct, click **Check URL** (🔗) to open the URL in a web browser on your desktop.

Warning


Incorrectly typed URLs often point to websites that contain inappropriate content. If you send a customer to the wrong website, it might damage the reputation of your company and/or threaten your position in your company.


Click **Send** to push the URL to your contact. The following text and an active URL link are displayed in the Chat Transcript area of the chat window or browser of your contact:

Please navigate to the link: <url>

You can access the history of URLs that you have sent to contacts. Click the down arrow in the Push URL field to open a menu from which you can select a previous URL. Alternately, you can start typing a URL that you have used before, and Workspace auto-suggests URLs from your history that match the text you enter.

Pending Response Indicator

When you receive a message from your contact, a timer is started. The timer is displayed in the interaction-type icon: . The duration of the timer is specified by your administrator. The timer indicates that you have a pending response to your contact.

The pending response indicator is displayed as part of the interaction-type icon () in the Chat interaction window.


The color of the pending response indicator begins as green. If you have not responded by a specific time interval, the indicator changes to yellow. If you still have not responded by a second time interval, the indicator changes to red and begins to flash. If the accessibility profile is active, you will hear a rising tone pulse to indicate that the response indicator is active. The higher the pitch, the closer to red status.

If you have a pending response, and the Chat Interaction window is not the active window, the Workspace task icon begins to flash in the Windows taskbar, regardless of the condition that is displayed by the pending response indicator. If the accessibility profile is active, the interaction rings periodically as the pending response indicator progresses.

If you place your mouse pointer over any flashing item, a preview of the interaction is displayed and the flashing stops. The preview displays the latest message from the contact.

Transferring a Chat Session

To transfer a chat session that you have accepted, perform the following steps:


1. Click the **Instant Chat Transfer** () button. The **Team Communicator** is displayed.
2. Choose a transfer target.
3. Select **Instant Chat Transfer**.

If the target accepts the interaction, the interaction window on your desktop closes.

If the target rejects the interaction, an error message informs you that the target has rejected the interaction.

Conferencing a Chat Session

To invite another party to join your chat session, perform the following steps:

1. Click the **Instant Chat Conference** () button. The **Team Communicator** is displayed.
2. Choose a conference target.
3. Select **Instant Chat Conference**.

An invitation is sent to the selected target.

If the target accepts the invitation, the target is added to your chat session. The target can access the chat transcript and is able to send messages to you and your contact simultaneously. Anything that you or your contact send during the conference is also displayed to the target. If you end the session, the ownership of the session is transferred to the conference target.

If the target rejects the invitation, a system message is displayed in the Chat Interaction window to inform you that the conference invitation has been rejected.

How do I continue a chat interaction?

[Link to video](#)


Some environments have asynchronous chat available. This feature keeps chats open after the last agent leaves the session, and the agent can rejoin the session until the session is marked **Done**. This video shows you how it works if it is available in your environment.

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.

Overview: Starting a Chat Consultation

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 viewing what you type or what your target responds.

The target can view 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 **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.

Tip

The consultation part of a chat interaction is not considered as a standalone interaction in your activity history. It is owned by the original contact interaction, not your history. The consultation part of the transcript of a contact interaction does not show up in the **Contact History** nor the **My History** views.


My History reports the contact-related interactions where the logged in agent engaged with the contact. Agents who are consulted are not considered as engaged with the contact and as a consequence are not marked as 'interaction owner'; therefore, this interaction does not show up in the **My History** of this agent.

For example: contact engaged with Agent1 - Agent1 consults Agent2, you will have:

- 1 New entry in My History of Agent1 - does not contain consultation transcript with Agent2
- No entry in My History of Agent2

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.

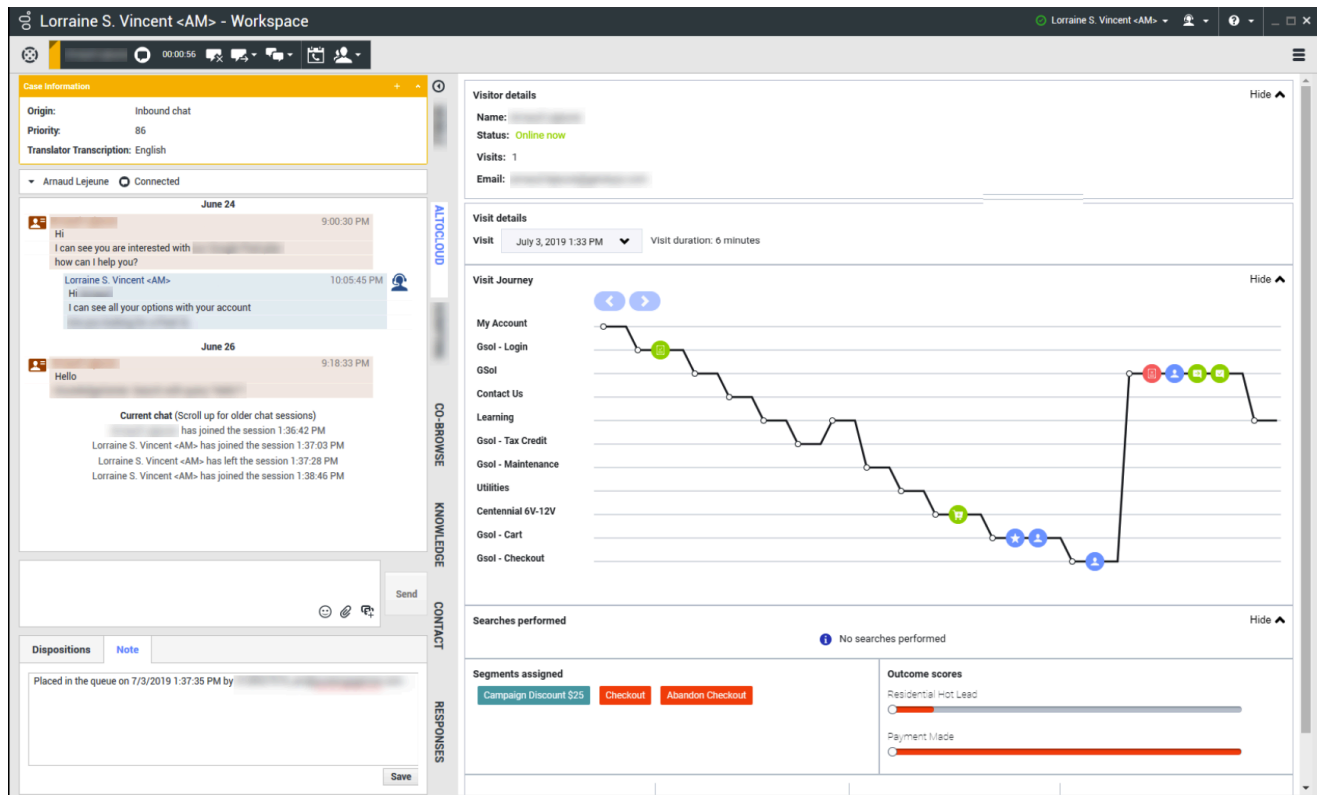
You, the contact, and the consultation target can each access the messages that are sent by the others.

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.

Altocloud Chat Interaction



If you are set up to use the **Genesys Altocloud** plugin the **Altocloud** tab is displayed in the Chat interaction window.

Use the **Altocloud** tab to view the details of a contact's visit to your company website before and after they initiated a web chat interaction. This usually happens when your contact clicks a web chat widget, requests a quote, or requests more information.

The *Genesys Altocloud Agent's Guide* contains all the information that you, as an agent, need to understand and use the contents of the **Altocloud** tab.

Get Started

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- [A visitor's experience](#)
- [Engage About journey analytics in Genesys Engage \(Workspace\)](#)

Using the Altocloud tab

- [Visitor details](#)
- [Visit details](#)

- [Customer journey map](#)
- [Segments assigned](#)
- [Outcome scores](#)

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- [Handle A Chat Interaction](#)
- [Handle A Chat Consultation](#)
- [Transfer A Chat Interaction](#)
- [Conference A Chat Interaction](#)
- [Handle an Altocloud Chat Interaction](#)
- [Blend Different Media Into A Single Conversation](#)
- [Main Window Basics](#)
- [Workspace Windows and Views](#)

Related topics

- [Functionality Overview](#)
- [Components, Features, and Controls](#)
- [Workspace Desktop Edition Help](#)

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