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Workspace Desktop Edition User's Guide

Blend Different Media Into A Single Conversation

5/10/2025

Blend Different Media Into A Single Conversation

In this lesson, you will learn how to use the Interaction window to manage a conversation with a contact or other party by using different media types simultaneously.

Workspace enables you to blend more than one media type into your conversation. You can chat with a contact online, while simultaneously speaking together on the phone and composing an email message to send information in writing. You can also manage a conference call with a contact and an internal party, while simultaneously conducting an IM session with the internal party. You can receive a phone number or email address in an email, chat, SMS, or Social Media interaction, and then click it to launch a new interaction.

Workspace provides many ways to blend interaction media simultaneously. The following sections provide some examples of what you can do:

- [Media Blending Overview](#)
- [Blending One Media with Another](#)
- [Blending an E-Mail Interaction with a Voice Interaction](#)
- [Blending a Voice Interaction with a Chat Interaction](#)
- [Blending Internal Voice Interactions and Internal IM Interactions](#)
- [Click to Blend](#)

Tip

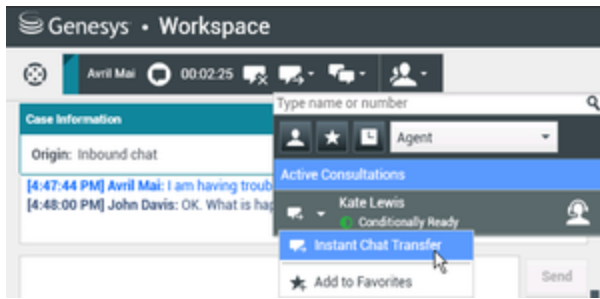
The procedures in this lesson demonstrate the principles of media blending; they do not show all the possible media-blending combinations.

Media Blending Overview

Workspace enables you to handle multiple, related interactions in a single window, and transition from one media type to another within the same window.

For example, if you are handling a chat interaction with a contact, you can start an IM consultation in the same window, and then you can add an email interaction while you add a voice consultation.

When you are engaged in one or more consultations with another party, such as another agent or other internal target, Workspace displays a list of your active consultations (see the Team Communicator displaying active consultations figure) whenever you display the Team Communicator by clicking the Instant Transfer, Instant Conference, and Start Consultation buttons in the active interaction.



Team Communicator displaying active consultations

The table **Some of the available media blending by type of interaction** lists *some* of the media blending combinations that are available from each media channel, including consultations. The table **Available consultation types and blending consultation types by interaction-type** lists the media blending combinations that are available for each consultation media-type.

Some of the available media blending by type of interaction

Interaction	Media blending and consultation
Voice (Contact)	E-mail
	SMS
	Social Media
	Voice consultation
	IM consultation
Voice (Internal target)	IM
	Voice consultation
	IM consultation
IM (Internal target)	Voice (Internal target)
E-mail (inbound from contact)	Voice
	SMS
	Social Media
	Voice consultation
	IM consultation
E-mail (outbound to contact)	Voice
	SMS
	Social Media
	Voice consultation
	IM consultation
Chat	Voice
	E-mail
	SMS
	Social Media
	Voice consultation

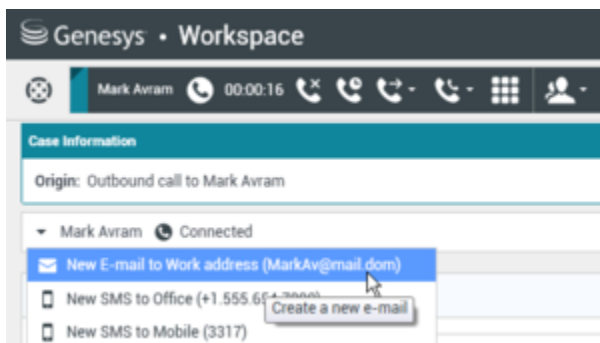
Interaction	Media blending and consultation
	IM consultation
	Chat consultation
SMS	Voice
	E-mail
Social Media	Voice
	E-mail
Workitem	SMS

Available consultation types and blending consultation types by interaction-type

Interaction	1st consult	1st transition consult	2nd transition consult
Voice	Voice consult	IM consult	X
E-mail	Voice consult	IM consult	X
	IM consult	Voice consult	X
Chat	Voice consult	IM consult	Chat consult
		Chat consult	IM consult
	IM consult	Voice consult	Chat consult
		Chat consult	X
	Chat consult	Voice consult	IM consult
		IM consult	Voice consult
Social Media	Voice consult	IM consult	X
	IM consult	Voice consult	X

Blending One Media with Another

From an active interaction, to add a new media-type to a conversation, click the Action menu that is next to the name of the party (see the Active party Action menu displaying available media figure).



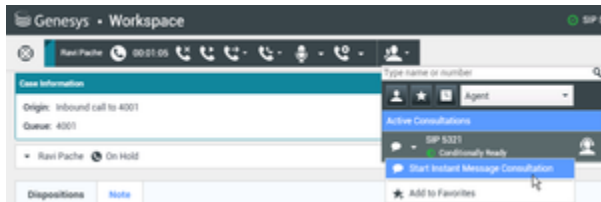
Active party Action menu displaying available media

The Action menu displays the media channels that are available for blending. The media that are

Blend Different Media Into A Single Conversation

available depends on several factors, including which media are available in your environment, what contact information is available, and to which media channels you are logged in.

The Team Communicator also displays the Action menu for each party with whom you have an active consultation when you click the Start Consultation button.



Active Consultations Action menu in Team Communicator

Blending an E-Mail Interaction with a Voice Interaction

You can email a contact or other party with whom you are engaged in a voice interaction. The opposite scenario is also possible; you can call a contact from an active E-Mail Interaction window.

Lesson: Blending an E-Mail interaction with a current Voice interaction

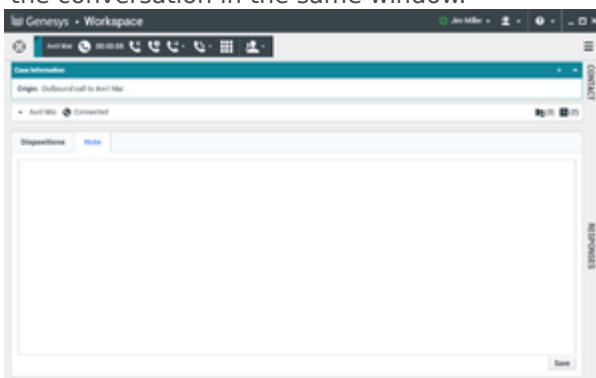
Purpose: To add a different type of media to an existing interaction.

Prerequisites

- You are logged in to Workspace (see [Lesson: Logging in to Workspace](#)).
- You have an active interaction with a contact (see [Receiving a Voice Interaction](#)).

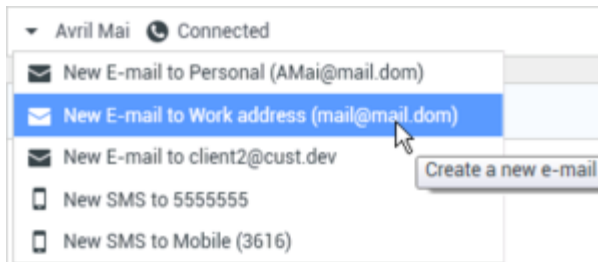
Start

1. During a call with a contact you might want to send an email message to the contact. The Voice Interaction window (see the Voice Interaction Window figure) enables you to add an email interaction to the conversation in the same window.



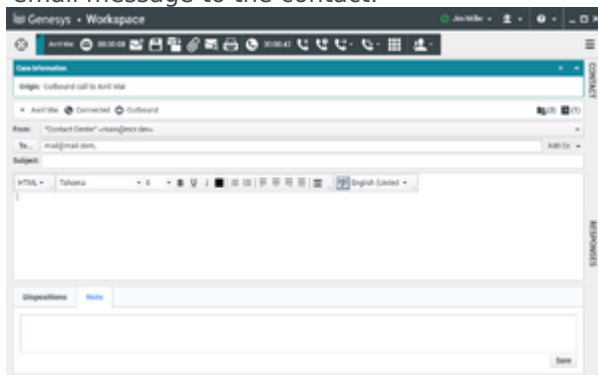
Voice Interaction Window

To open the list of available media for the contact, in the interaction window, click the Party Action menu that is next to the name of the contact (see the Interaction window Party Action menu figure).



Interaction window Party Action menu

2. Select the email address to which you want to send the email message (see the Interaction window Party Action menu figure). The E-Mail Interaction view is added to the Voice Interaction window (see the Voice interaction and email interaction blended in the same window figure). You can now compose an email message to the contact.



Voice interaction and email interaction blended in the same window

3. Complete the email ([Lesson: Creating and sending a new email interaction to a contact](#)) and voice ([Lesson: Handling an inbound voice interaction](#)) interactions.

End

Blending a Voice Interaction with a Chat Interaction

You can call a contact or other party with whom you are engaged in a chat interaction. The opposite scenario is not possible; you cannot start a chat interaction from an active Voice Interaction window.

Lesson: Blending a voice interaction with a current chat interaction

Purpose: To add different media-types to an existing interaction.

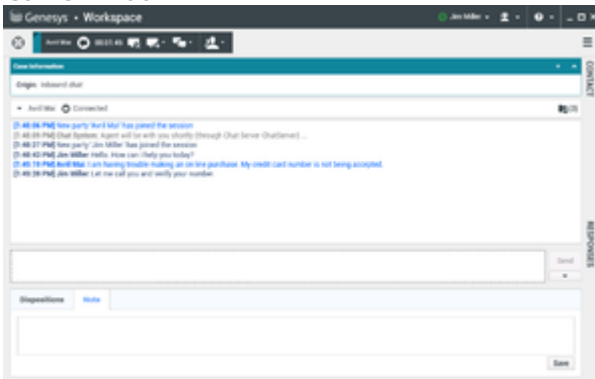
Prerequisites

- You are logged in to Workspace (see [Lesson: Logging in to Workspace](#)).
- You have an active interaction with a contact (see [Lesson: Handling an inbound chat interaction](#)).

Start

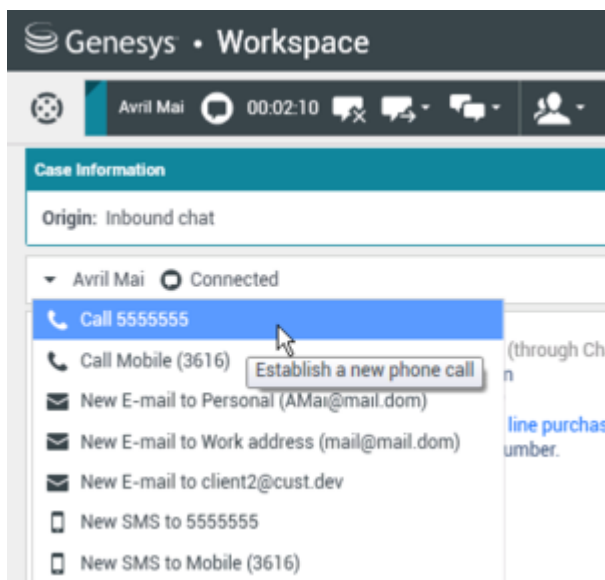
1. During a chat with a contact you might want to call the contact. The Chat Interaction window (see the

Chat Interaction Window figure) enables you to add an voice interaction to the conversation in the same window.



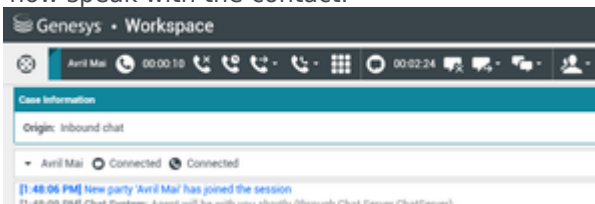
Chat Interaction Window

To open the list of available media for the contact, in the interaction window, click the Party Action menu that is next to the name of the contact (see the Interaction window Party Action menu figure).



Interaction window Party Action menu

2. Select the phone number that you want to call (see the Interaction window Party Action menu figure). The Voice Interaction view is added to the Chat Interaction window (see the Chat interaction and voice interaction blended in the same window figure). Both interactions have the Connected status. You can now speak with the contact.



Chat interaction and voice interaction blended in the same window

3. Complete the chat ([Lesson: Handling an inbound chat interaction](#)) and voice ([Lesson: Handling an inbound voice interaction](#)) interactions.

End

Blending Internal Voice Interactions and Internal IM Interactions

Workspace enables you to blend media during internal interactions, whether you are calling agent-to-agent, or are consulting with another party while you are handling an interaction with a contact, you can add different media to your internal interactions.

This section contains the following procedures:

- [Lesson: Blending an internal IM with an active internal voice interaction](#)
- [Lesson: Blending an internal IM consultation with an active internal voice consultation.](#)
- [Lesson: Blending a voice consultation with an IM consultation.](#)

Lesson: Blending an internal IM with an active internal voice interaction

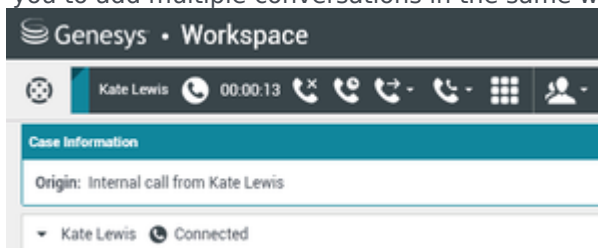
Purpose: To add an internal IM interaction to an active internal voice interaction and handle both in the same window.

Prerequisites

- You are logged in to Workspace (see [Lesson: Going Ready in the Workspace Main window](#)).
- You have an active call with an internal target (see [Lesson: Calling an internal target](#)).

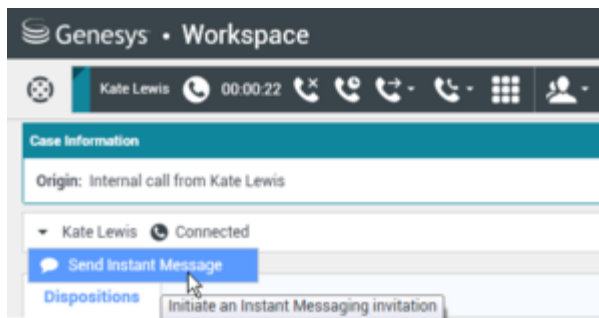
Start

1. During a call with an internal target, you might want to blend an IM interaction into your conversation. The Voice Interaction window (see the Active voice interaction, with an internal target figure) enables you to add multiple conversations in the same window.



Active voice interaction, with an internal target

To add an IM interaction to your conversation, click the Party Action menu next to the name of your internal target and select Send Instant Message (see the Party menu in the active Voice Interaction window figure).

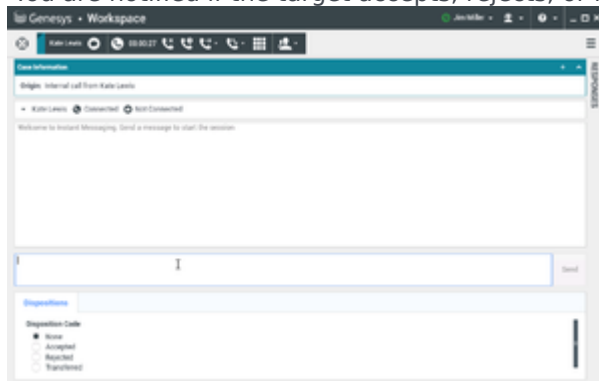


Party menu in the active Voice Interaction window

The IM interaction view is displayed in the active Voice Interaction window (see the Starting an IM interaction in the active interaction window figure).

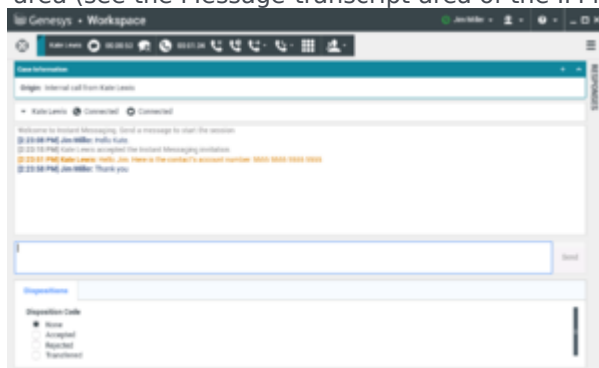
2. Enter a message to your target. The session starts in the interaction window (see the Starting an IM interaction in the active interaction window figure) when you send your first message. The target is presented with an interactive notification that enables the target to accept or reject your invitation to engage in an IM session.

You are notified if the target accepts, rejects, or lets your invitation time-out.



Starting an IM interaction in the active interaction window

3. If your target accepts your invitation, you can conduct an IM session by entering a text message to the internal target in the text field at the bottom of the view (see the Starting an IM interaction in the active interaction window figure). The transcript of your conversation is displayed in the message transcript area (see the Message-transcript area of the IM interaction view figure).



Message-transcript area of the IM interaction view

4. Complete your voice interaction by following [Lesson: Calling an internal target](#). Complete your IM interaction by following [Lesson: Initiating an Instant Messaging session](#). You can end either of the interactions while keeping the other active.

End

Lesson: Blending an internal IM consultation with an active internal voice consultation

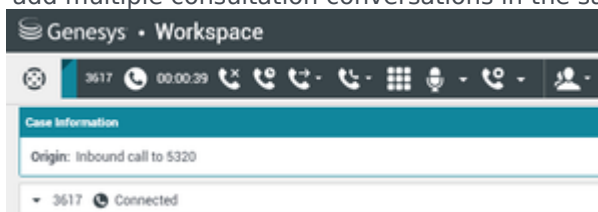
Purpose: To add an internal IM consultation to an active internal voice consultation and handle both in the same window.

Prerequisites

- You are logged in to Workspace (see [Lesson: Going Ready in the Workspace Main window](#)).
- You have an active interaction with a contact (see [Receiving a Voice Interaction](#)).

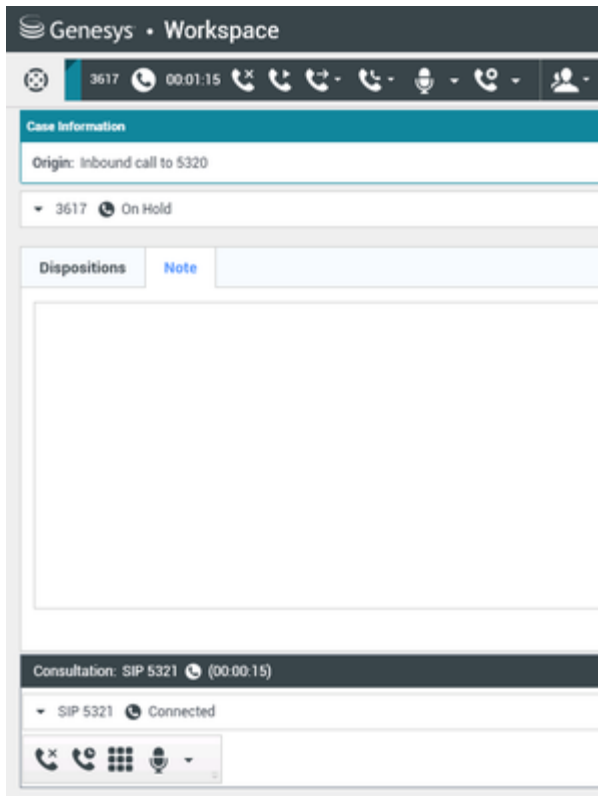
Start

1. During a call with a contact you might want to start a voice consultation and then blend in an IM consultation. The Voice Interaction window (see the Voice Interaction Window figure) enables you to add multiple consultation conversations in the same window.




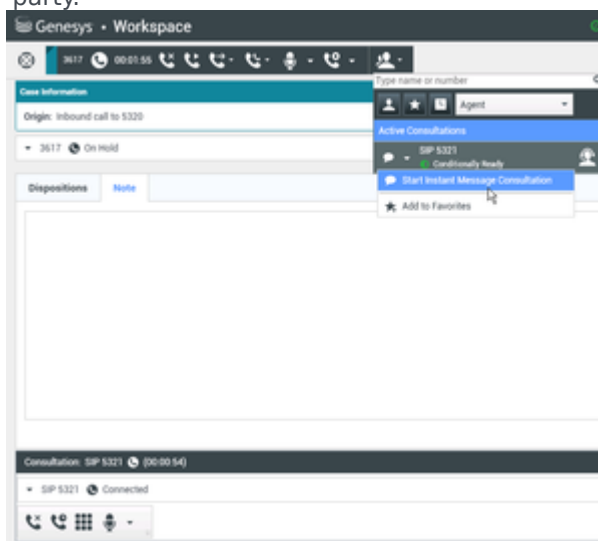
Voice Interaction Window

Start a consultation call with an internal target or other party by using the following [Lesson: Starting a voice consultation](#). The consultation is added to the current interaction window (see the Voice Interaction window, with an added voice consultation figure).



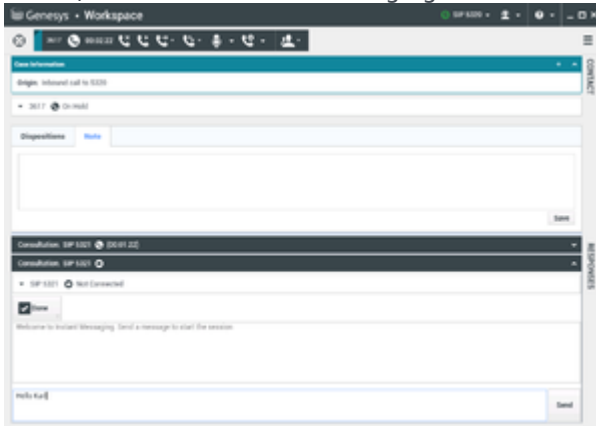
Lesson: Starting a voice consultation

2. To add an IM consultation an active voice consultation, click the Start Consultation button () on the main interaction toolbar. The Team Communicator is displayed. It displays a list of your active consultations (see the Team Communicator, displaying active consultations figure).
3. Click the Action menu that is next to the name of the party with whom you want to start an IM consultation (see the Active Consultation Action menu figure) to display a list of available media for the party.



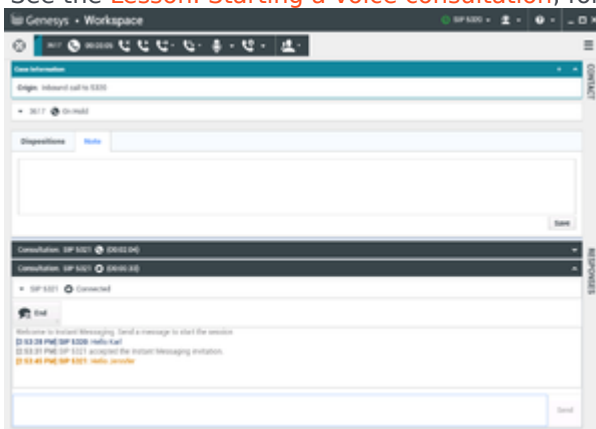
Active Consultation Action menu

- Click Start Instant Message Consultation (see the Active Consultation Action menu figure). The IM interaction view is displayed in the active interaction window beneath your active voice consultation view (see the An Instant Messaging consultation added to the current voice consultation figure).



An Instant Messaging consultation added to the current voice consultation

- Enter a message to your target. The session starts in the Interaction window (see the An Instant Messaging consultation added to the current voice consultation figure) when you send your first message. The target is presented with an interactive notification that enables the target to accept or reject your invitation to engage in an IM session. You are notified if the target accepts, rejects, or lets your invitation time-out.
- If your target accepts your invitation, you can conduct an IM session by entering a text message to the internal target in the text field at the bottom of the view (see the An Instant Messaging consultation added to a voice consultation in the Interaction window figure). See the [Lesson: Starting a Consultation IM session from an active interaction](#), for information on how to handle an IM interaction. See the [Lesson: Starting a voice consultation](#), for information on how to handle a voice consultation.



Lesson: Starting a voice consultation

End

Lesson: Blending a voice consultation with an IM consultation

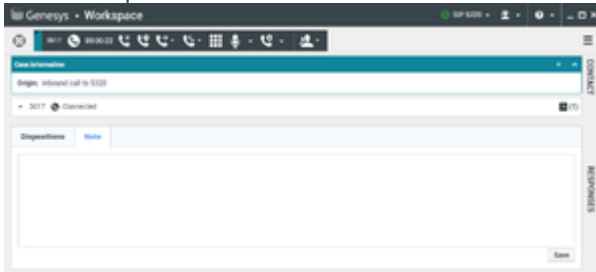
Purpose: To add an internal voice interaction to an active internal IM interaction and handle both in the same window.

Prerequisites

- You are logged in to Workspace (see [Lesson: Going Ready in the Workspace Main window](#)).
- You have an active interaction with a contact (see [Receiving a Voice Interaction](#)).

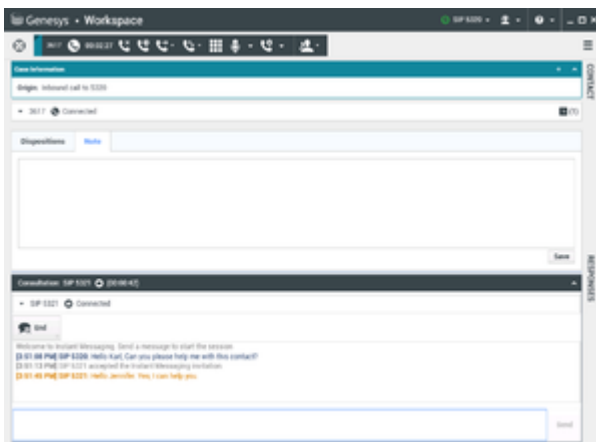
Start

1. During a call with a contact you might want to start an IM consultation and then blend in a voice consultation. The Voice Interaction window (see the Voice Interaction Window figure) enables you to add multiple consultation conversations in the same window.




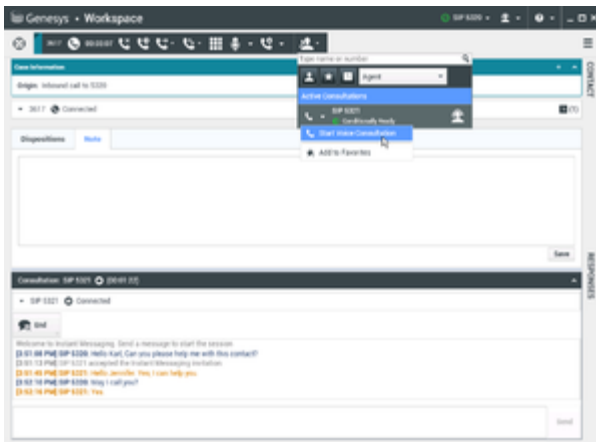
Voice Interaction Window

Start a consultation IM with an internal target or other party by using the following [Lesson: Starting a Consultation IM session from an active interaction](#). The consultation is added to the current interaction window (see the Voice Interaction window, with an added IM consultation figure).



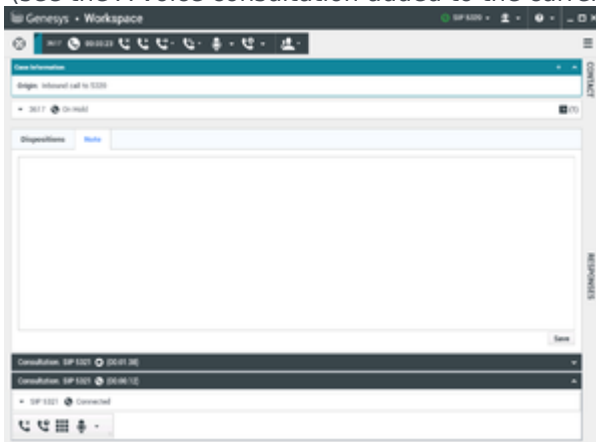
Lesson: Starting a Consultation IM session from an active interaction

2. To add a voice consultation to an active voice consultation, click the Start Consultation button () on the main interaction toolbar. The Team Communicator is displayed. It displays a list of your active consultations (see the Team Communicator, displaying active consultations figure).
3. Click the Action menu that is next to the name of the party with whom you want to start a voice consultation (see the Active Consultation Action menu figure) to display a list of available media for the party.



Active Consultation Action menu

4. Click Start Voice Consultation (see the Active Consultation Action menu figure). The voice interaction view is displayed in the active interaction window beneath your active IM consultation view (see the A voice consultation added to the current IM consultation figure).



A voice consultation added to the current IM consultation

The target is presented with an interactive notification that enables the target to accept or reject your invitation to engage in a voice consultation.

You are notified if the target accepts, rejects, or lets your invitation time-out.

5. If your target accepts your invitation, you can speak with your voice consultation target. See the [Lesson: Starting a voice consultation](#), for information on how to handle a voice consultation. See the [Lesson: Starting a Consultation IM session from an active interaction](#), for information on how to handle an IM interaction.

End

Click to Blend

Workspace can recognize phone numbers and email addresses in email, chat, and SMS interactions. When Workspace recognizes an email address or phone number in an interaction, it converts the information into a link. When you click a link, it can launch a new interaction.

Lesson: Creating a new email interaction by clicking an email address link in a chat interaction

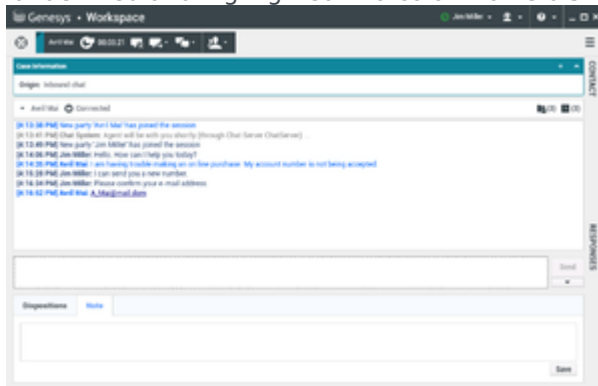
Purpose: To create a new email interaction by clicking an email address link in another interaction. The principles of this procedure are applicable to email links in chat, email, and SMS interactions.

Prerequisites

- You are logged in to Workspace (see [Lesson: Going Ready in the Workspace Main window](#)).
- You have an active chat, email, or SMS interaction.

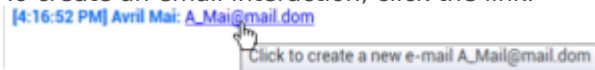
Start

1. If you are handling a chat interaction (see [Lesson: Handling an inbound chat interaction](#)), and your contact sends you an email address in their message, Workspace will convert the email address to an address link (see the Chat interaction with a clickable email link from the contact figure). The link is underlined and highlighted in a color that is distinct from the other text.



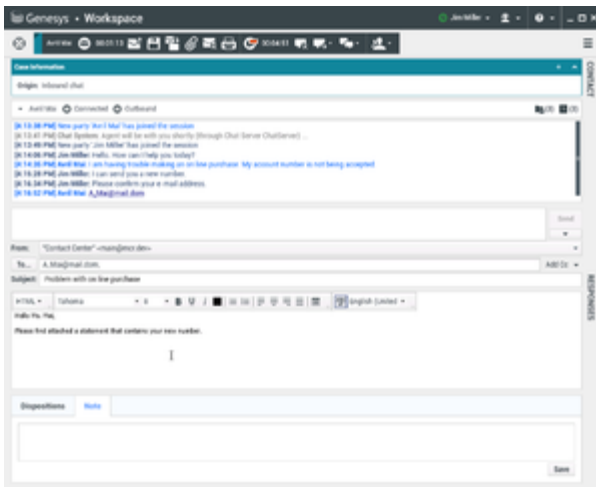
Chat interaction with a clickable email link from the contact

2. To create an email interaction, click the link.



Click E-Mail links in the Chat transcript to start a new E-Mail Interaction.

The E-Mail Interaction view is displayed within the Chat Interaction window (see the Chat Interaction window containing an E-Mail Interaction view that was added by clicking an email address link in the chat transcript figure).



Chat Interaction window containing an E-Mail Interaction view that was added by clicking an email address link in the chat transcript

3. Compose an email message to the recipient ([Lesson: Creating and sending a new email interaction to a contact](#)). The controls for the email interaction are displayed next to the chat controls (see the Chat Interaction window containing an E-Mail Interaction view that was added by clicking an email address link in the chat transcript figure).
4. Click Send to send the email interaction to the address that you clicked. You can also click Save, Save In Draft, workbin, Add Attachment, or Delete — see [Creating and Handling a New or Reply Email Interaction](#).
5. Complete the chat interaction (see [Lesson: Handling an inbound chat interaction](#)).

End

Lesson: Creating a new voice interaction by clicking an phone number link in an SMS interaction

Purpose: To create a new voice interaction by clicking a phone number link in another interaction.

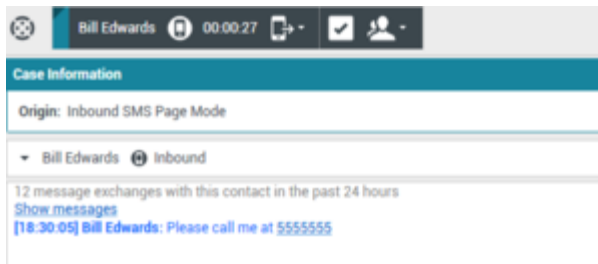
The principles of this procedure are applicable to phone number links in chat and SMS interactions.

Prerequisites

- You are logged in to Workspace (see [Lesson: Going Ready in the Workspace Main window](#)).
- You have an active chat or SMS interaction.

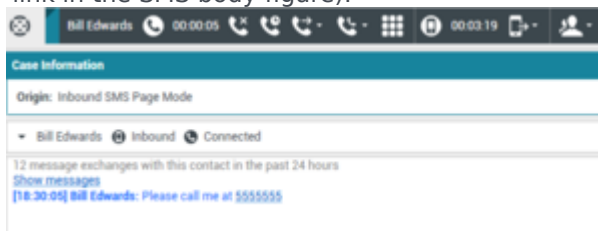
Start

1. If you are handling an SMS interaction (see [Lesson: Handling an inbound SMS interaction](#)), and your contact sends you a phone number in their message, Workspace will convert the phone number to a link (see the SMS interaction with a clickable phone number link from the contact figure). The link is underlined and highlighted in a color that is distinct from the other text.



SMS interaction with a clickable phone number link from the contact

2. To create a voice interaction, click the link. The Voice Interaction controls are displayed within the SMS Interaction window and the connection status is added to the interaction-status view (see the SMS Interaction window containing Voice Interaction controls that were added by clicking a phone number link in the SMS body figure).



SMS Interaction window containing Voice Interaction controls that were added by clicking a phone number link in the SMS body

3. Complete the voice interaction (see [Lesson: Calling a contact](#)).
4. Complete the SMS interaction (see [Lesson: Handling an inbound SMS interaction](#)).

End

Related Information

- [Voice Interaction](#)
- [Internal Voice Interaction](#)
- [Voice Consultation](#)
- [Chat Interaction](#)
- [Inbound Email](#)
- [Outbound Email](#)
- [SMS and MMS Interactions](#)
- [Internal IM](#)
- [Facebook Interaction](#)
- [Twitter Interaction](#)
- [RSS Interaction](#)