Workspace Desktop Edition User's Guide

Transfer An SMS or MMS Interaction

5/9/2025

Transfer An SMS or MMS Interaction

[**Modified:** 8.5.110.13]

In this lesson, you will learn how to transfer SMS or MMS interactions to an internal target. This lesson contains the following sections:

- Transferring an SMS Interaction
- Transferring an MMS Interaction

Transferring an SMS Interaction

The Workspace SMS Interaction window enables you to transfer your current SMS interaction to another party. In this section, you will learn how to use the Team Communicator feature to transfer an SMS interaction to an internal target. This section contains the following procedures:

- Lesson: Starting an instant SMS transfer
- Lesson: Receiving a transferred SMS
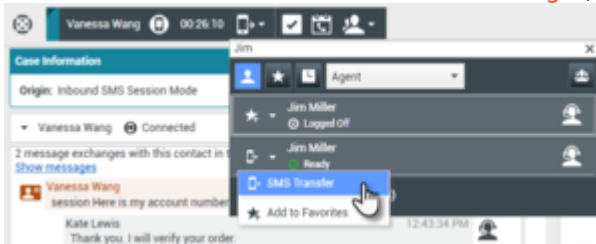
Lesson: Starting an instant SMS transfer

Purpose: To find an internal target (such as an agent, Routing Point, or queue), and transfer the SMS to the internal target.

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 SMS interaction).
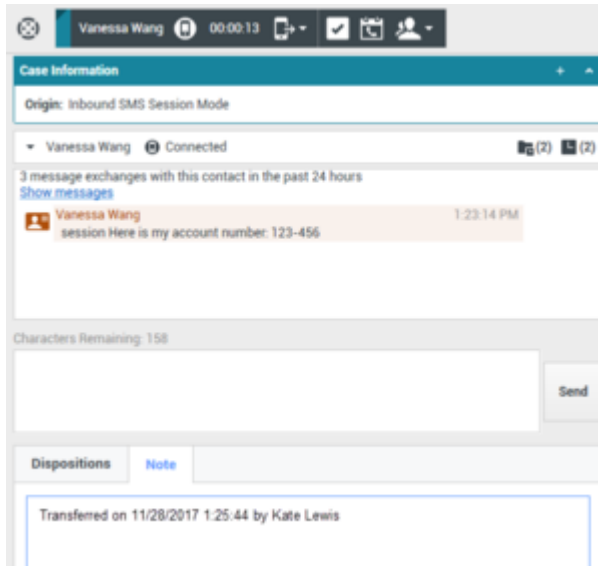
Start

1. In the active SMS Interaction window, click Transfer to open the Team Communicator (see the Finding an internal target of an SMS transfer in the active SMS Interaction window figure) to find the internal target to whom you want to transfer the current interaction (see the Lesson: Using the Team Communicator feature to find an internal target).

   Finding an internal target of an SMS transfer in the active SMS Interaction window

2. Click the `Action Menu` drop-down list that is displayed next to the name of the internal target to whom you want to transfer the interaction and then select `SMS Transfer`.

   An invitation is sent to the target to accept the SMS transfer. If the target accepts the interaction-transfer request, the interaction window closes on your desktop and opens on the desktop of the transfer target (see the Transferred SMS Interaction window displayed on the desktop of the transfer target figure).

   Transferred SMS Interaction window displayed on the desktop of the transfer target

   If the target does not accept the interaction-transfer request, the SMS Interaction window remains displayed on your desktop and an error is displayed both at the top of the window and in the Workspace `My Messages` interactive notification.
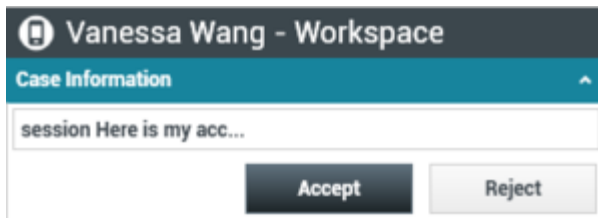
End

Lesson: Receiving a transferred SMS

Purpose: To receive a transferred SMS interaction from another agent.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- Your status is Ready for the SMS media channel (see Lesson: Going Ready in the Workspace Main window).

Start

1. If another agent wants to transfer an SMS interaction to you, you are notified of the consultation request by the Workspace Interaction Preview interactive notification (see the Interaction Preview interactive notification, informing you of a transfer request figure).
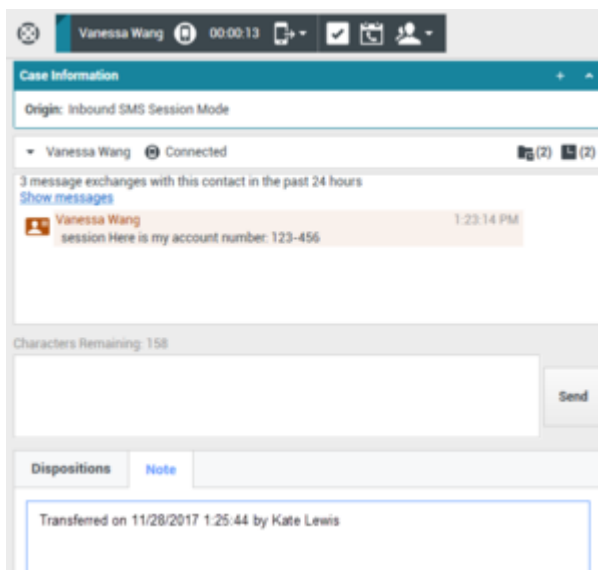
Interaction Preview interactive notification, informing you of a transfer request

> ## Tip
>
> If you are using a screen reader, your system might be configured to give the focus to the Interaction Preview window. In this scenario, your screen reader will automatically read the contents of the window to you. However, if your system is not configured to give the focus to the Interaction Preview window, to have your screen reader read the contents of the Interaction Preview window, you must use screen navigation to give the focus to the Interaction Preview. (**Added:** 8.5.101.14)

Click Accept to accept the transfer. The interaction is transferred to you immediately.

SMS Interaction window, displaying your status as connected to the SMS party

2. You are now the owner of the SMS interaction. Refer to Step 3 of the Lesson: Handling an inbound SMS interaction, for information about how to handle an SMS interaction.

End

Transferring an MMS Interaction

[**Added:** 8.5.110.13]

The Workspace MMS Interaction window enables you to transfer your current MMS interaction to another party. In this section, you will learn how to use the Team Communicator feature to transfer an MMS interaction to an internal target.

This section contains the following procedure:

- Lesson: Starting an instant MMS transfer
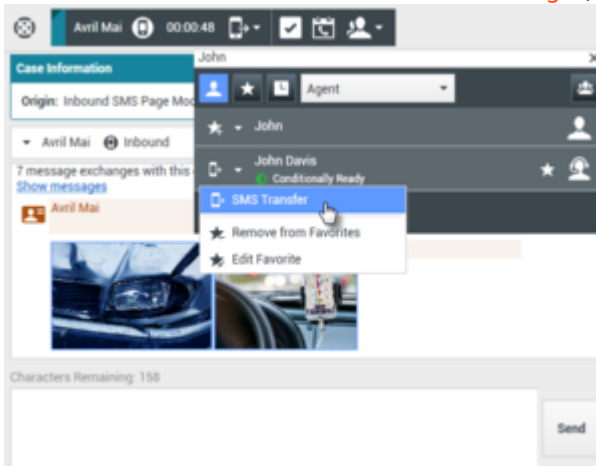
Lesson: Starting an instant MMS transfer

Purpose: To find an internal target (such as an agent, Routing Point, or queue), and transfer an MMS to the internal target.

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 MMS interaction).

Start

1. In the active MMS Interaction window, click Transfer to open the Team Communicator (see the Finding an internal target of an MMS transfer in the active MMS Interaction window figure) to find the internal target to whom you want to transfer the current interaction (see the Lesson: Using the Team Communicator feature to find an internal target).

Finding an internal target of an MMS transfer in the active MMS Interaction window

2. Click the Action Menu drop-down list that is displayed next to the name of the internal target to whom you want to transfer the interaction and then select SMS Transfer.

   An invitation is sent to the target to accept the MMS transfer. If the target accepts the interaction-transfer request, the interaction window closes on your desktop and opens on the desktop of the transfer target.

   If the target does not accept the interaction-transfer request, the MMS Interaction window remains displayed on your desktop and an error is displayed both at the top of the window and in the Workspace My Messages interactive notification.

End

Related Information

- SMS and MMS Interactions