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Workspace Desktop Edition User's Guide

Handle A Chat Consultation

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Handle A Chat Consultation

In this lesson, you will learn how to use the Team Communicator feature to find an internal agent and start a chat consultation. A chat conference enables an internal target to participate in the current chat session with you and your contact. A chat consultation enables an internal target to view the chat transcript between you and your contact, and to chat with you privately in a second chat session in the same Chat Interaction window. The Team Communicator enables you to find an internal target or a contact, send an Instant Message (IM) to an internal target, call an internal target or a contact, initiate a conference, or transfer a call. This lesson contains the following section:

- [Starting or Receiving a Chat Consultation](#)

Starting or Receiving a Chat Consultation

The Workspace Chat Interaction window enables you to consult with an internal target about your current chat interaction. Your internal target can see the messages that you exchange with your contact, but the contact does not see the messages that you exchange with your internal target. Chat consultation is only available from an active Chat interaction. A chat consultation between two agents is ended if the chat with the contact is ended. This section contains the following procedures:

- [Lesson: Starting a chat consultation](#)
- [Lesson: Receiving a chat consultation request](#)

Lesson: Starting a chat consultation

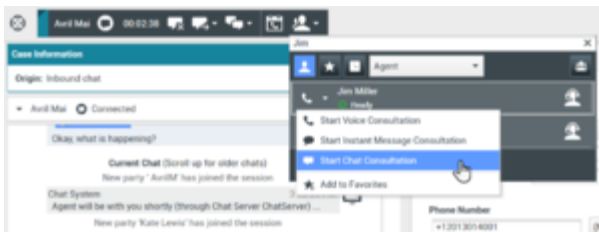
Purpose: To find an internal target (such as an agent, agent group, skill, interaction queue, or routing point), and then start and complete a chat consultation with the internal target, without the current contact seeing the messages that you exchange with the internal target.

Prerequisites

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

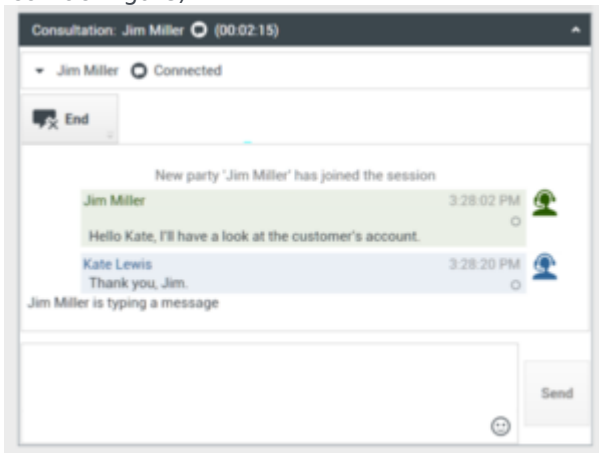
Start

1. In the active Chat Interaction window, click the Start Consultation button and then use the Team Communicator (see the Finding an internal target for a chat consultation in the active Chat Interaction window figure) to find the internal target with whom you want to start a consultation (see the [Lesson: Using the Team Communicator feature to find an internal target](#)). 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.



Finding an internal target for a chat consultation in the active Chat Interaction window

2. Click the Action menu drop-down list that is displayed next to the name of the internal target with whom you want to consult, and then select **Start Chat Consultation**. An interaction notification is displayed on the desktop of your target.
When the internal target accepts the consultation request, you can chat with the internal target without the contact reading the messages that you exchange.
If the consultation target does not accept your request, the consultation request is released.
3. When you are connected to your consultation target, the chat interaction with the internal target is added to the Chat Interaction window below the interaction with your contact (see the Chat Interaction window, displaying a consultation chat with an internal target below the chat interaction with the contact figure).



Chat Interaction window, displaying a consultation chat with an internal target below the chat interaction with the contact

You can perform any of the following functions by using the Chat Consult toolbar and interface:

- End the consultation.
 - Call the internal target by using the Action menu drop-down list next to the party name.
 - IM the internal target by using the Action menu drop-down list next to the party name.
 - Mark Done the chat consultation.
- The transcript of your interaction with the contact, and any notes you might have recorded, are displayed in the Chat Interaction window on the desktop of your consultation target. However, the consultation target cannot interact with your contact (see the Chat Consultation Interaction window figure).
 - The internal target can choose to release the consultation. If this happens, the internal target is disconnected, but you remain connected to the contact.
 - If you click the **End** button and the internal target is still connected, the session is transferred automatically to the internal target. If you have completed your chat interaction and the internal target has already

disconnected from the conference, go to Step 8 of the [Lesson: Handling an inbound chat interaction](#).

End

Lesson: Receiving a chat consultation request

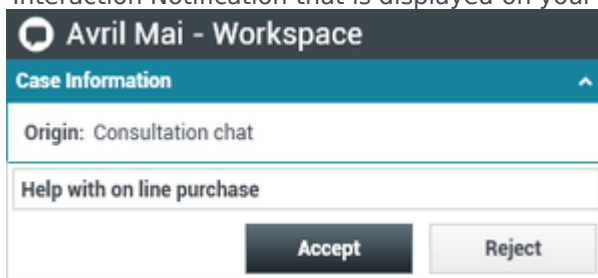
Purpose: Receive an invitation to a consult about a chat interaction from another agent to provide assistance to that agent in completing an active interaction.

Prerequisites

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

Start

1. If another agent wants to consult with you about a chat interaction, they will initiate a chat consultation. You are notified of the consultation request by the Workspace Interaction Preview (see the Consultation Interaction Notification that is displayed on your desktop figure).



Consultation Interaction Notification that is displayed on your desktop

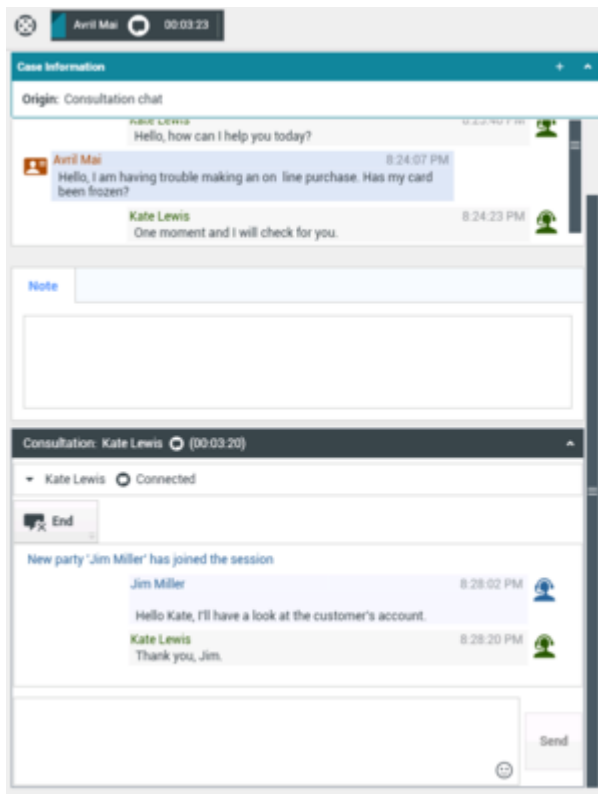
Tip

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 connect to the chat interaction.

2. The Workspace Chat Consultation Interaction window (see the Chat Consultation Interaction window figure) enables you to perform the following functions while you are chatting with the agent who initiated the consultation:
 - View the transcript of the chat session between the contact and the agent who initiated the consultation.
 - Send messages to the agent who initiated the consultation.
 - Receive messages from the agent who initiated the consultation.
 - End the consultation.

- Call the agent who initiated the consultation.
- Mark Done the chat consultation.



Chat Consultation Interaction window

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.

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

End

Related Information

- [Chat Consultation help](#)