Workspace Desktop Edition User's Guide

Workspace Desktop Edition 8.5.1

3/17/2023

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Workspace 8.5 User's Guide

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Contact Center Tasks

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Change History

For information about releases 8.1.2 and earlier, see the PDF version of the Interaction Workspace 8.1.3 User's Guide

Getting Started

These lessons introduce you to Workspace, the next-generation Genesys agent desktop interface, and show you how to get started accepting interactions.

This topic contains the following sub-topics (click a link below or use the TOC on the left to navigate this section):

- Workspace Concepts
- Log In
- Main Window Basics
- Manage Your Status
- Forward Your Calls
- Find A Contact Or An Internal Target

Videos

There are some videos on the Workspace Help landing page that you might find useful. Even more videos are available for the latest Cloud version of Workspace. The user interface is a little different, but you might find these videos instructive.

Workspace Concepts

This lesson introduces you to Workspace, the next-generation Genesys agent desktop interface. Privilege- and role-driven capabilities, as well as features that focus on the needs of the user, make Workspace a total agent solution. The Workspace agent interface enables users to invoke interactions that are related to existing interactions--ensuring a consistent customer experience. This lesson contains the following sections:

- Introduction
- Workspace Windows and Views
- Team Communicator Overview
- Finding Contacts, Internal Targets, and Interactions
- Definition--Role-Based
- Definition--Role Privilege
- Basic Use-Case Summary

Introduction

Workspace is the customer-interaction user interface for the Genesys 8 suite.

The Workspace application enables you to manage, from your workstation desktop, both Public Switched Telephone Network (PSTN)-based and Internet-based contact interactions.

Workspace enables you to handle customer interactions, manage your status, and interact with others in your contact center.

Privileges are assigned to you, based on your role. You might be a junior agent who has only a limited set of media and controls, you might be an expert agent who has access to all of the privileges that are available through Workspace, or you might have a specialized role created for you by your administrator that enables you to handle specific types of interactions.

Workspace Windows and Views

Workspace displays on your workstation desktop a set of Views and Windows, that contain the components, features, and controls that enable you to perform the tasks that are assigned to you, based on your privileges. The Views and Windows enable you to perform multiple functions, such as previewing and accepting interactions; or managing your status, settings, and contacts. Atomic views typically enable you to perform a single function, such as viewing case information or specifying a disposition code.

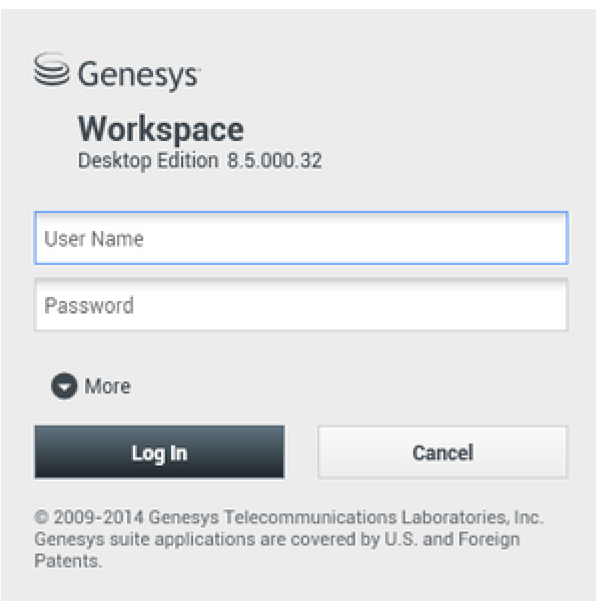
Some views, such as the Case Information view, are displayed in separate windows. Other views are part of a window, such as the Voice Interaction window; these are displayed in one window along with other components, features, and controls .

Refer to the *Workspace Desktop Edition Help* for details on the functionality in each window and view.

Views, Windows, Components, Features, and Control Overview

The Workspace Views and Windows enable you to perform multi-step tasks and provide you with many functional options. The following Windows are included in Workspace; however, through customization, many more can be created:

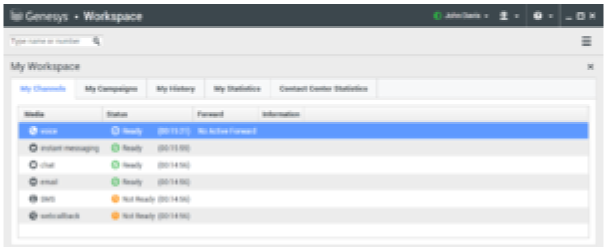
- **Login Window**--The first view that you see (see Log In). It enables you to identify yourself and, if required, enter additional login data, based on your role or on the technical environment.



Workspace Login Window

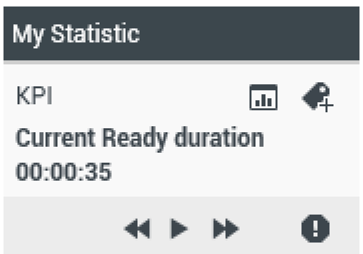
- **Main Window**--Enables you to manage your status, contacts, and settings; view your Key Performance

Indicators (KPIs) and system messages; and launch new interactions.



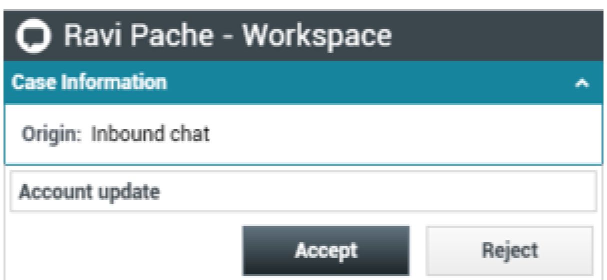
Workspace Main Window

- **Statistics Gadget**--Enables you to view your KPIs and Contact Center Statistics in a permanent view. Statistics can be viewed in a ticker and/or in a static view.



Workspace Statistics Gadget

- **Interaction Preview**--Displays an interactive notification of a new inbound interaction. The preview includes case information to enable you to decide whether to accept, reject, or redirect the interaction (see Handling Voice Interactions).

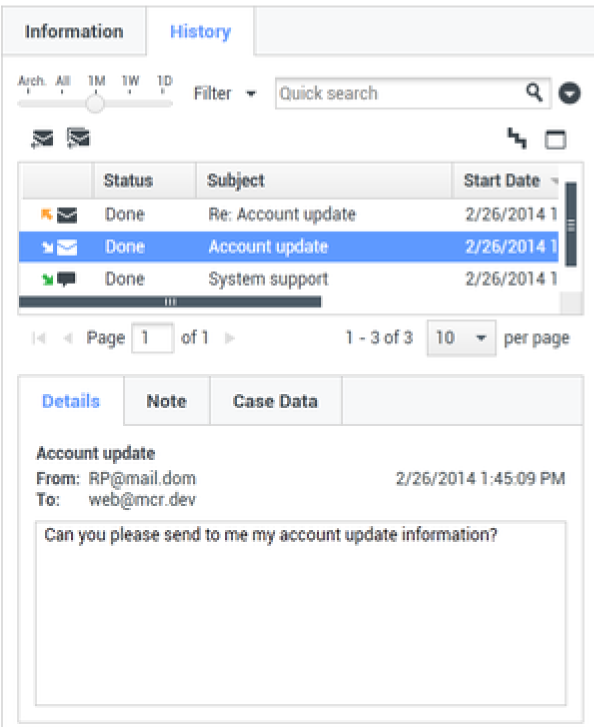


Workspace Interaction Preview

- **Voice Interaction Window**--Enables you to view all of the information that is necessary to handle a voice interaction with a contact. This window also contains information about contacts and the Team Communicator.
- **Web Callback**--Enables you to view all of the information that is necessary to handle a Web Callback voice interaction with a contact.
- **Outbound Campaign**--Enables you to view all of the information that is necessary to handle an Outbound Campaign voice interaction with a contact.
- **Consultation**--Enables you to initiate a call to an internal expert or support person. It is part of the Team Communicator functionality.
- **E-Mail--**Enables you to view all of the information that is necessary to handle an email interaction with

a contact.

- **Chat**--Enables you to view all of the information that is necessary to handle a chat interaction with a contact.
- **SMS**--Enables you to view all of the information that is necessary to handle an SMS Page interaction or an SMS Session interaction with a contact.
- **Workitems**--Documents that might be directed to you for handling. They include numerous non-interactive media types, such as faxes, that you might have to view while you are handling interactions of another type, such as email.
- **Internal IM**--Enables you to initiate an Instant Messaging (IM) session with an internal expert or support person. It is part of the Team Communicator functionality.
- **History**--Enables you to view case data (business context of the case). Compiles the attached data that is associated with the main interaction of the case into a Case History (see Manage Contacts). It is part of Workspace functionality for processing voice interactions as well as other media types.



Workspace Contact History

Components, Features, and Controls

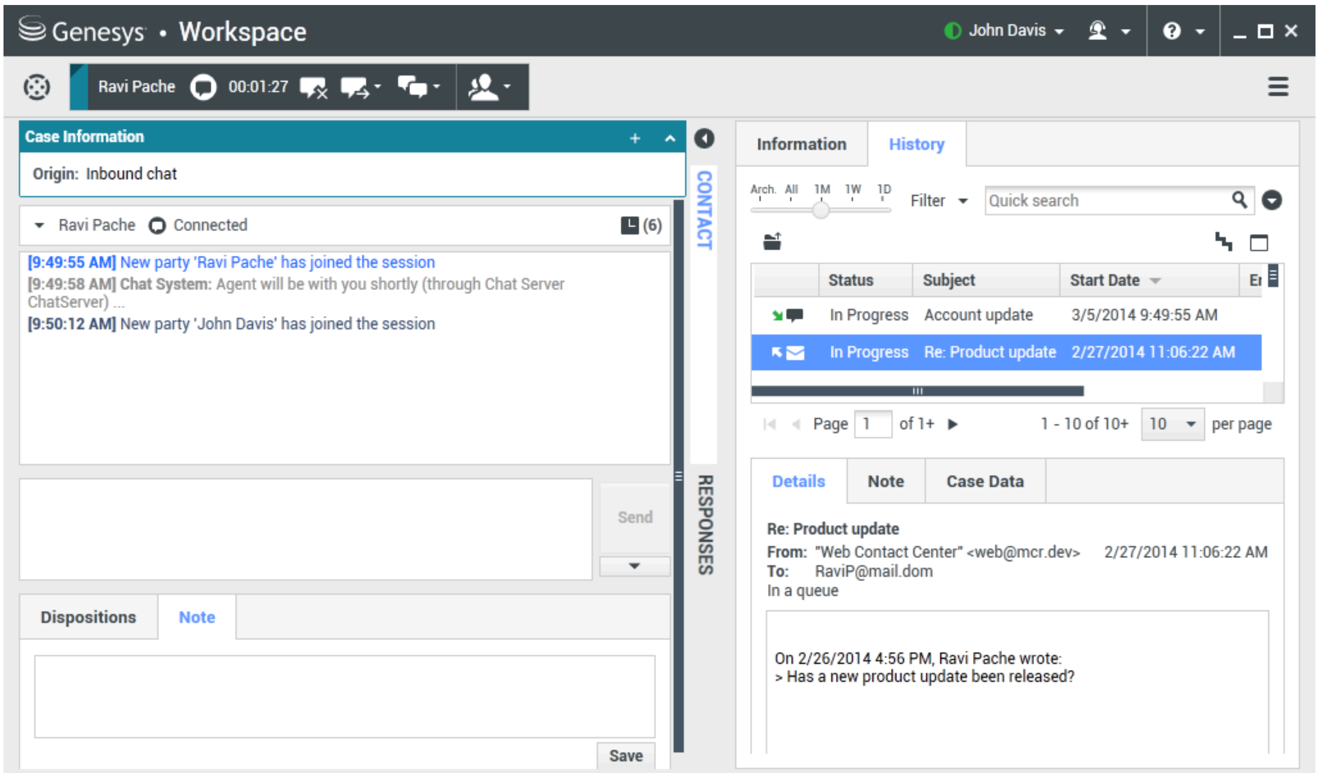
The Workspace Components, Features, and Controls are mapped to privileges. They enable you to perform single-step tasks, provide you with one or two functional options, and provide you with information that supports your current task. Components, Features, and Controls are usually contained within a View, but they might also be displayed in stand-alone windows or panels. Components, Features, and Controls behave like mini-applications. You can hide or show them and expand them or collapse them by clicking buttons in the View or Window in which they are contained. Refer to the *Workspace 8.5 Help* for details on the functionality in each window and view.

The following Components, Features, and Controls are included in Workspace; however, through customization, many more can be created:

- **Case Information**--Provides you with critical information about the active interaction. The information that is provided is configured by your system administrator.
- **Contact Summary**--Provides you with critical information about the contact who is involved in the active interaction.
- **Voice Media**--Enables you to control the active voice interaction or start a new interaction.
- **Voice Internal**--Enables you to control the active internal voice interaction or start a new internal interaction.
- **Case Toolbar**--Enables you to hold, connect, and end current interactions.
- **Dispositions**--Enables you to assign one or more codes to an ongoing or terminated interaction to qualify or characterize the outcome of the interaction, and a call result for outbound campaign interactions.
- **Note View**--Enables you to record information about the current interaction.
- **History List**--Enables you to view the history of interactions with the selected contact.
- **History Interaction Details**--Enables you to view the details of previous interactions with the selected contact.
- **Contact Record**--Enables you to view information about contacts that has been collected by your contact center.
- **Responses**--Enables you to access a database of pre-written standard responses for your interactions. You can insert these responses as replies into any email or chat message, or you can read them to the contact during a phone interaction. You might be configured to use suggested responses that are rated according to their relevancy to the content of the inbound interaction.
- **Team Communicator**--Enables you to call an internal target or contact, start a conference, or transfer the current interaction.
- **Child Interaction Navigator**--Enables you to view and select any "child" interactions that you have initiated that relate to the current customer interaction (the parent interaction), such as an internal consultation call or a chat with another agent.
- **IM Media**--Enables you to initiate or receive Instant Messaging (IM) interactions.
- **My Status**--Enables you to monitor the status of your media channels.
- **My Messages**--Provides you with up-to-date information about the status of your contact center, changes that are related to your activities, and business messages that your leads send to you.
- **Workbins**--Enables you to store email and other interactions that are to be handled later. Interactions that are stored in a workbin can be accessed in any order. Items that are stored in a workbin are owned by the owner of the workbin.
- **Preferences**--Enables you to control the appearance of various Workspace interface components.
- **Recent Items**--Enables you to select a recent contact from a drop-down list.
- **My Campaigns**--Provides you with a list of all of your active Outbound Campaigns. If you are part of a pull-preview campaign, you can get a new campaign record.
- **My History**--Enables you to view a record of your recent activity.
- **My Statistics**--Enables you to view your Key Performance Indicators (KPIs).

- **Contact Center Statistics**--Enables you to view the statistics of your contact center.
- **Schedule a Callback**--Enables you to set a later date and/or time to callback a contact from a campaign list.

Workspace Main Window



Link to video

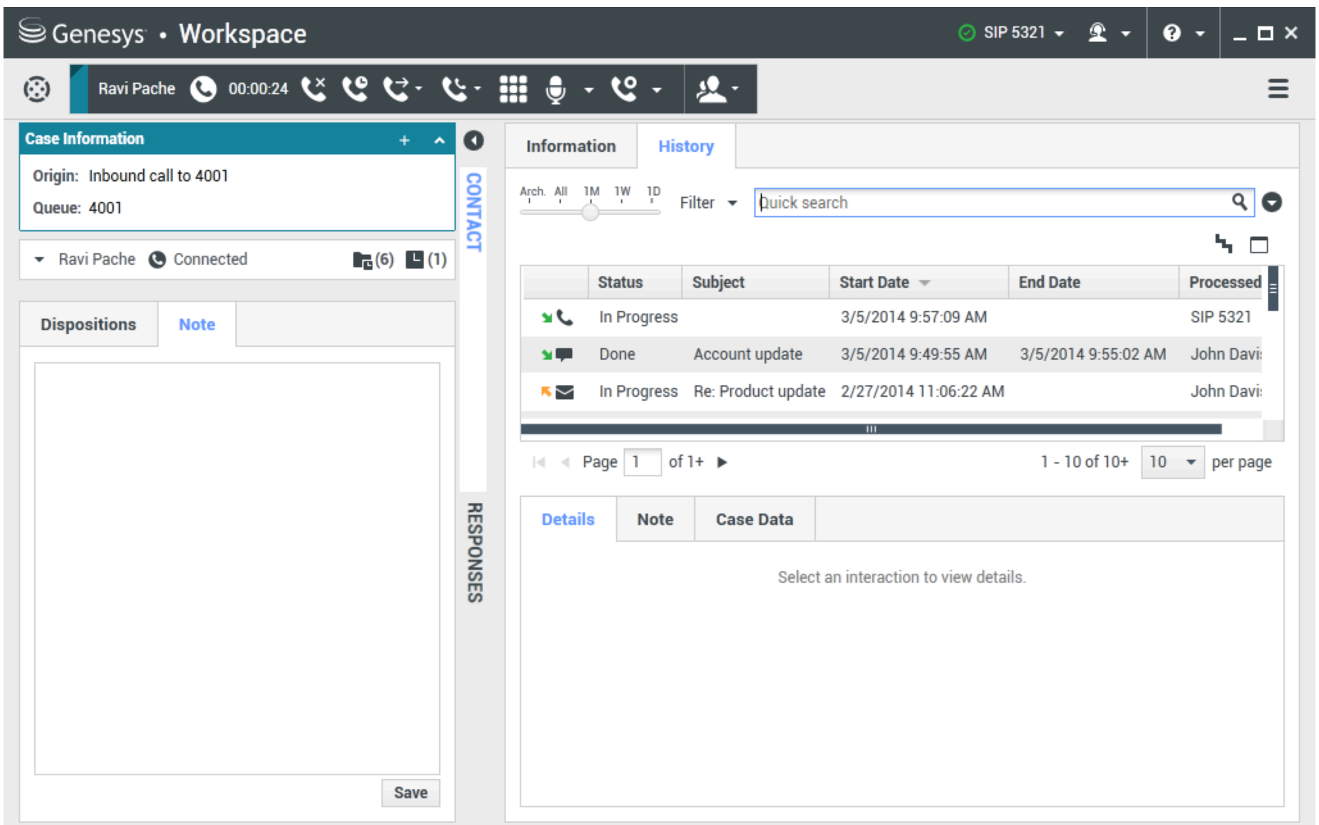
The Workspace Main Window (see the Workspace Main Window figure) is a module that enables you to manage your channels, status, KPIs, contacts, workbins, and campaigns. It can be used to initiate interactions, either directly or through a search of the contact database and interaction history. The Main Window supports simultaneous interactions on one or more channels and provides the interaction Preview interactive notification. You can use the Main Menu to set preferences, launch Help, display the Statistics Gadget, and exit the application. For more information about the functions that are available in the Main Window, see the following lessons:

- **Docking, Undocking, and Auto-hiding**--Main Window Basics
- **Go Ready**--Manage Your Status
- **Set a Forwarding Number**--Forward Your Calls
- **Find an Internal Target or a Contact**--Find A Contact Or An Internal Target
- **Call an Internal Target or a Contact**--Handle Voice Interactions
- **IM an Internal Target**--Handle Internal Instant Messaging

- **E-Mail a Contact**--Handle An E-Mail Interaction
- **Manage Workbins--**Using Workbins
- **Manage Contacts**--Manage Contacts
- **View Statistics**--View KPIs And Statistics
- **Receive Messages**--Receive Business And System Messages
- **Change the Appearance of Interface**--Personalize Your Workspace

Link to video

Voice Interaction Window



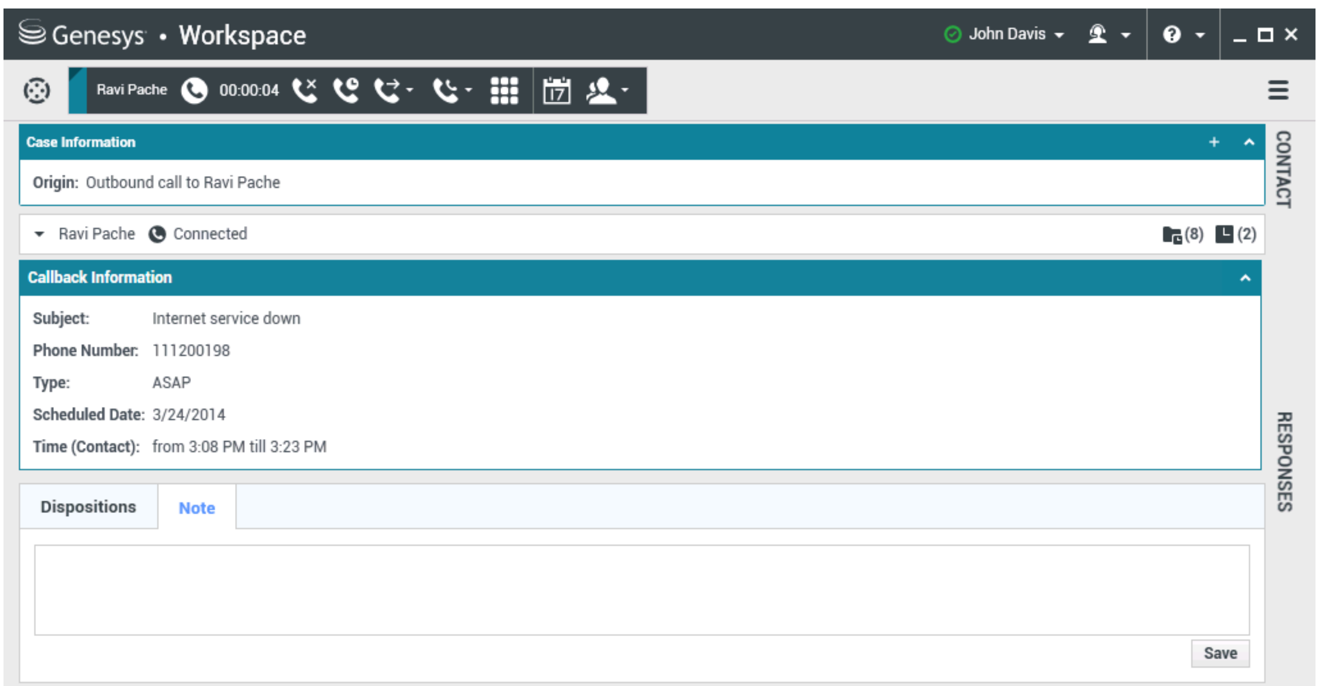
The Voice Interaction window (see the Workspace Voice Interaction window figure) and the Web Callback Interaction window enable you to view all of the information that is required to handle a voice interaction with a contact or an internal target.

You can view call status, history, and case data. You can control the call, conference or transfer the call, enter notes about the call, and send DTMF.

For more information about the functions that are available in the Voice Interaction window, see the following lessons:

- **Find an Internal Target or a Contact**--Find A Contact Or An Internal Target
- **Call an Internal Target or a Contact**--Handle Voice Interactions
- **Start a Voice or IM Consultation**--Handle A Voice Consultation
- **Transfer to an Internal Target or a Contact**--Transfer A Voice Call
- **Conference with an Internal Target or a Contact**--Conference A Voice Call
- **Transition an IM Consultation to a Voice Consultation**--Blend Different Media Into A Single Conversation
- **Record a Call**--Record Interactions
- **Set a Disposition Code**--Apply Disposition Codes
- **Manage Contacts, Contact Case History, and Set a Note**--Manage Contacts
- **Use Standard Responses**--Using The Standard Response Library

Web Callback Interaction Window



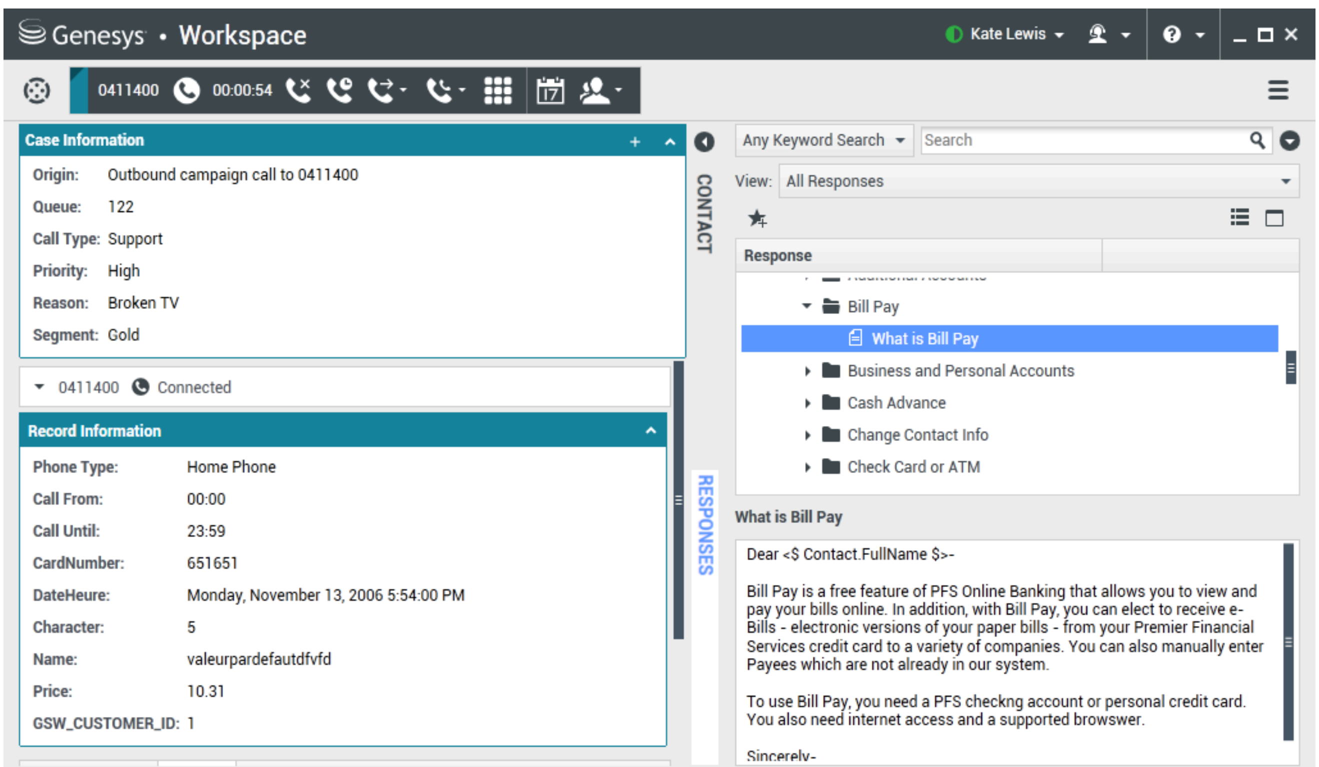
The Web Callback Interaction window enables you to view all of the information that is required to handle a web callback interaction with a contact (see the Workspace Voice Interaction window figure).

You can view call status, history, and case data. You can control the call, conference or transfer the call, enter notes about the call, and send DTMF.

For more information about the functions that are available in the Voice Interaction window, see the following lessons:

- **Find an Internal Target or a Contact**--Find A Contact Or An Internal Target
- **Call an Internal Target or a Contact**--Handle Voice Interactions
- **Handle a Web Callback interaction**--Handle Web Callback Interactions
- **Start a Voice or IM Consultation**--Handle A Voice Consultation
- **Transfer to an Internal Target or a Contact**--Transfer A Voice Call
- **Conference with an Internal Target or a Contact**--Conference A Voice Call
- **Transition an IM Consultation to a Voice Consultation**--Blend Different Media Into A Single Conversation
- **Record a Call**--Record Interactions
- **Set a Disposition Code**--Apply Disposition Codes
- **Manage Contacts, Contact Case History, and Set a Note**--Manage Contacts
- **Use Standard Responses**--Using The Standard Response Library

Outbound Campaign Voice Interaction Window



The Outbound Campaign Voice Interaction window (see the Workspace Outbound Campaign Voice

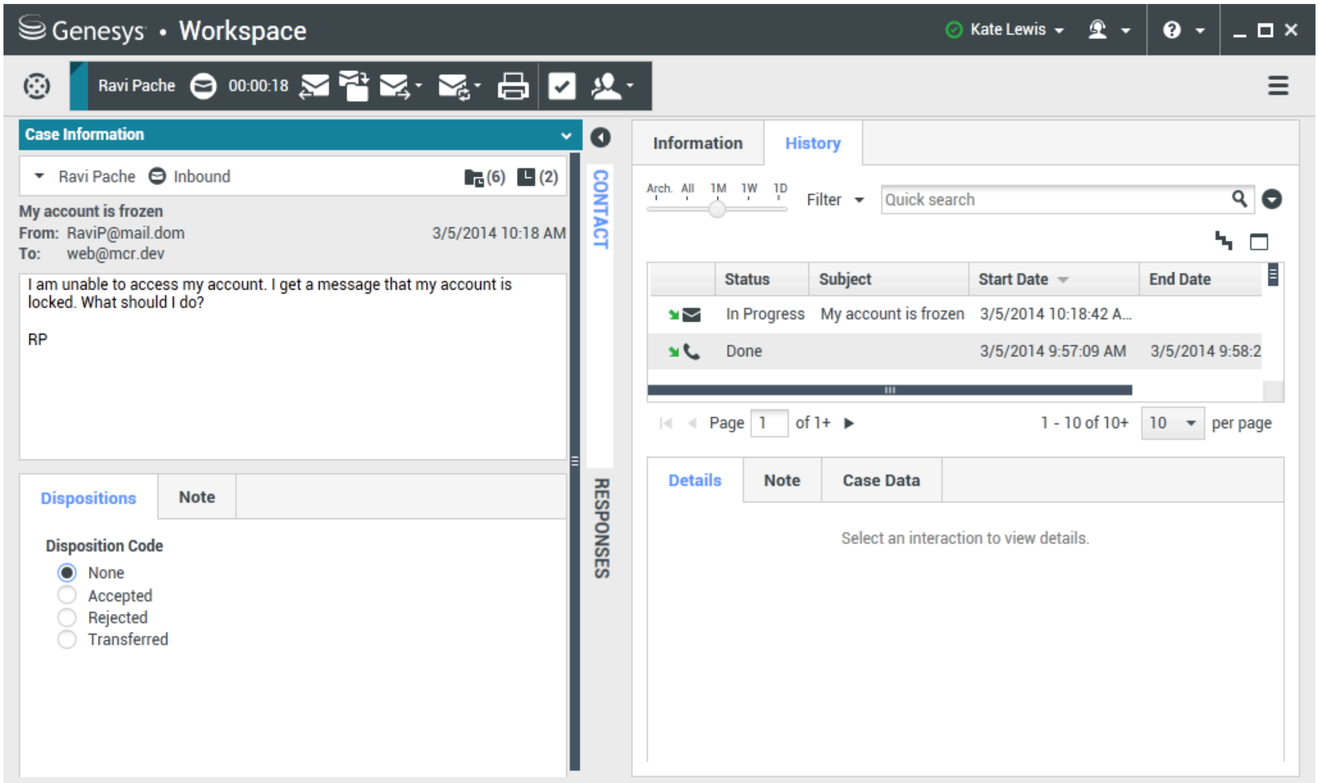
Interaction window figure) enables you to view all of the information that is required to handle an Outbound Campaign voice interaction with a contact.

You can view call status, history, case data, and record information. You can control the call, conference or transfer the call, enter notes about the call, and send DTMF.

For more information about the functions that are available in the Outbound Campaign Voice Interaction window, see the following lessons:

- **Find an Internal Target or a Contact**--Find A Contact Or An Internal Target
- **Call an Internal Target or a Contact**--Handle Voice Interactions
- **Transfer to an Internal Target or a Contact**--Transfer A Voice Call
- **Conference with an Internal Target or a Contact**--Conference A Voice Call
- **Handle an Outbound Campaign Voice Interaction (including Rescheduling a call)**--Handle Outbound-Campaign Voice Interactions
- **Record a Call**--Record Interactions
- **Set a Disposition Code**--Apply Disposition Codes
- **Manage Contacts and Contact Case History**--Manage Contacts
- **Use Standard Responses**--Using The Standard Response Library

Email Interaction Window



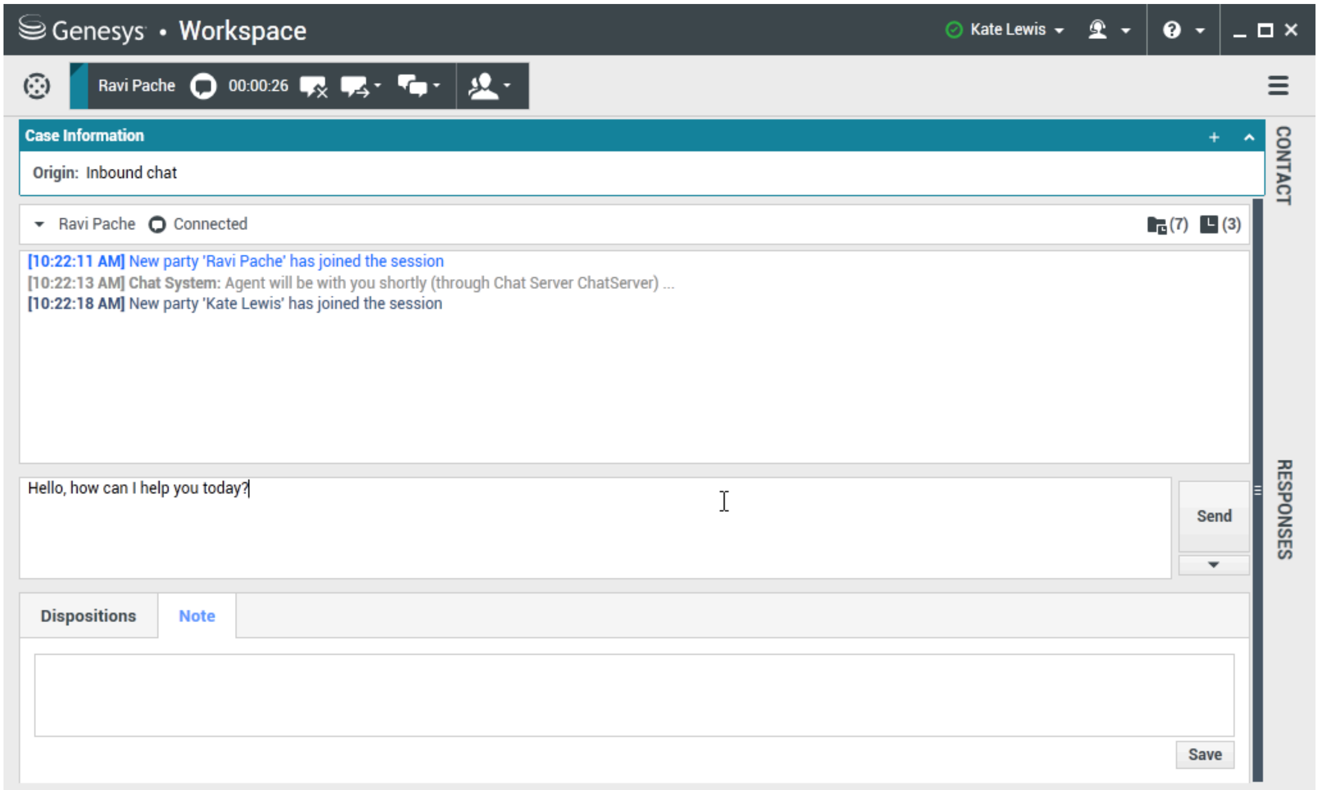
The Email Interaction window (see the Workspace E-Mail Interaction window figure) enables you to view all of the information that is required to handle an email interaction with a contact.

You can view information about the email, history, and case data. You can reply to the interaction, save to a workbin, transfer the interaction, start a conference, and enter notes about the interaction.

For more information about the functions that are available in the E-Mail Interaction window, see the following lessons:

- **Find an Internal Target or a Contact**--Find A Contact Or An Internal Target
- **Call an Internal Target or a Contact**--Handle Voice Interactions
- **Start a Voice or IM Consultation**--Handle A Voice Consultation
- **Transfer to an Internal Target or a Contact**--Transfer A Voice Call
- **Transition an IM Consultation to a Voice Consultation**--Blend Different Media Into A Single Conversation
- **Set a Disposition Code**--Apply Disposition Codes
- **Manage Contacts and Contact Case History**--Manage Contacts
- **Use Standard Responses**--Using The Standard Response Library

Chat Interaction Window



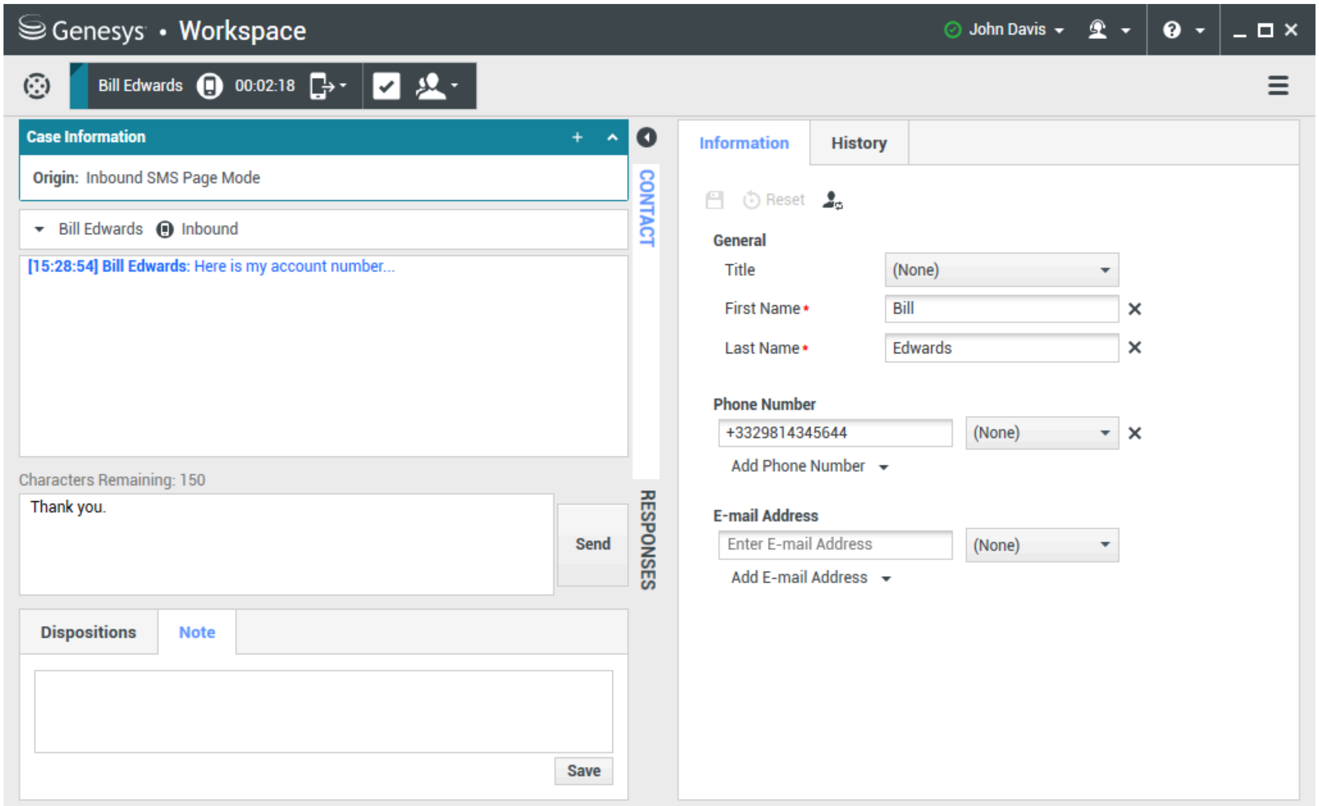
The Chat Interaction window (see the Workspace Chat Interaction window figure) enables you to view all of the information that is required to handle a chat interaction with a contact.

You can view chat status, history, and case data. You can control the interaction, start a conference, transfer the interaction, and enter notes about the interaction.

For more information about the functions that are available in the Chat Interaction window, see the following lessons:

- **Find an Internal Target or a Contact**--Find A Contact Or An Internal Target
- **Call an Internal Target or a Contact**--Handle Voice Interactions
- **Start a Voice or IM Consultation**--Handle A Voice Consultation
- **Transfer to an Internal Target or a Contact**--Transfer A Voice Call
- **Conference with an Internal Target or a Contact**--Conference A Voice Call
- **Transition an IM Consultation to a Voice Consultation**--Blend Different Media Into A Single Conversation
- **Set a Disposition Code**--Apply Disposition Codes
- **Manage Contacts and Contact Case History**--Manage Contacts
- **Use Standard Responses**--Using The Standard Response Library

SMS Interaction Window



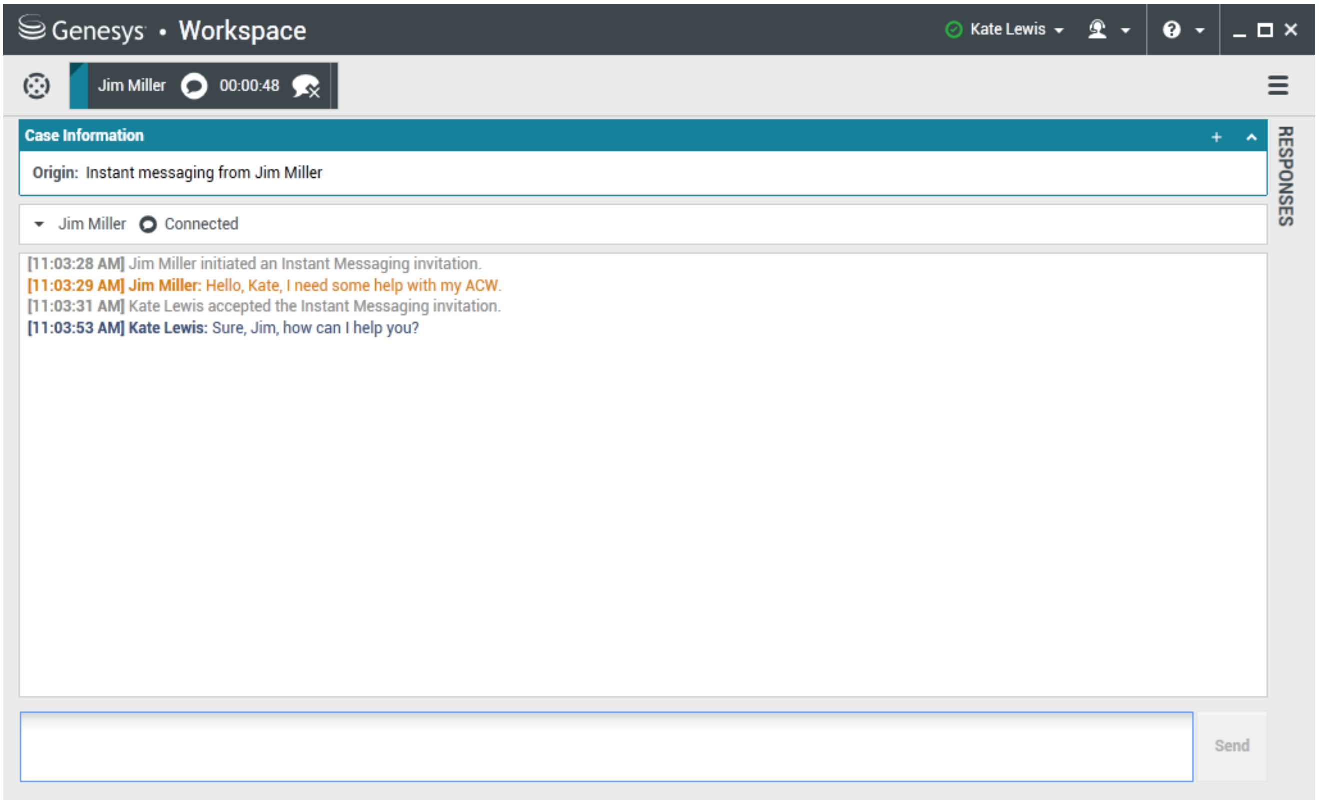
The SMS Interaction window (see the Workspace SMS Interaction window figure) enables you to view all of the information that is required to handle an SMS Page interaction or an SMS Session interaction with a contact.

You can view SMS status, history, and case data. You can control the interaction, transfer the interaction, and enter notes about the interaction.

For more information about the functions that are available in the SMS Interaction window, see the following lessons:

- **Find an Internal Target or a Contact**--Find A Contact Or An Internal Target
- **Call an Internal Target or a Contact**--Handle Voice Interactions
- **Handle An SMS Interaction**--Handle An SMS Interaction
- **Transfer to an Internal Target or a Contact**--Transfer An SMS Interaction
- **Set a Disposition Code**--Apply Disposition Codes
- **Manage Contacts and Contact Case History**--Manage Contacts
- **Use Standard Responses**--Using The Standard Response Library

IM Interaction Window



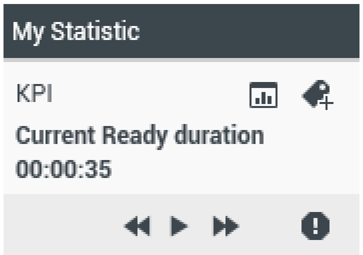
The Instant Messaging (IM) Interaction window (see the Workspace Instant Messaging (IM) Interaction window figure) enables you to view all of the information that is required to handle an IM interaction with an internal target.

You can send an IM to another agent (internal target) or receive an IM from an internal target. If you start the IM from an active Interaction, you can share contact information with the IM target. You can also transition from an IM consultation session to a voice consultation.

For more information about the functions that are available in the IM Interaction window, see the following lessons:

- **IM an Internal Target**--Handle Internal Instant Messaging
- **Transition an IM Consultation to a Voice Consultation**--Blend Different Media Into A Single Conversation

Statistics Gadget



Statistics can be viewed either in the Main Window by selecting the `My Statistics` tab or the `Contact Center Statistics` tab in your Workspace, or by using the Statistics Gadget (see the Statistics Gadget displaying Contact Center Statistics figure).

The Statistics Gadget displays statistics in two ways:

- A statistics ticker
- A tagged-statistic view

The advantage of the Statistics Gadget is that you can view your KPIs and Contact Center Statistics continuously without having to open your Workspace and clicking back and forth between tabs.

For more information about the functions that are available in the Statistics Gadget, see the following lesson:

- **View Statistics**--View KPIs And Statistics

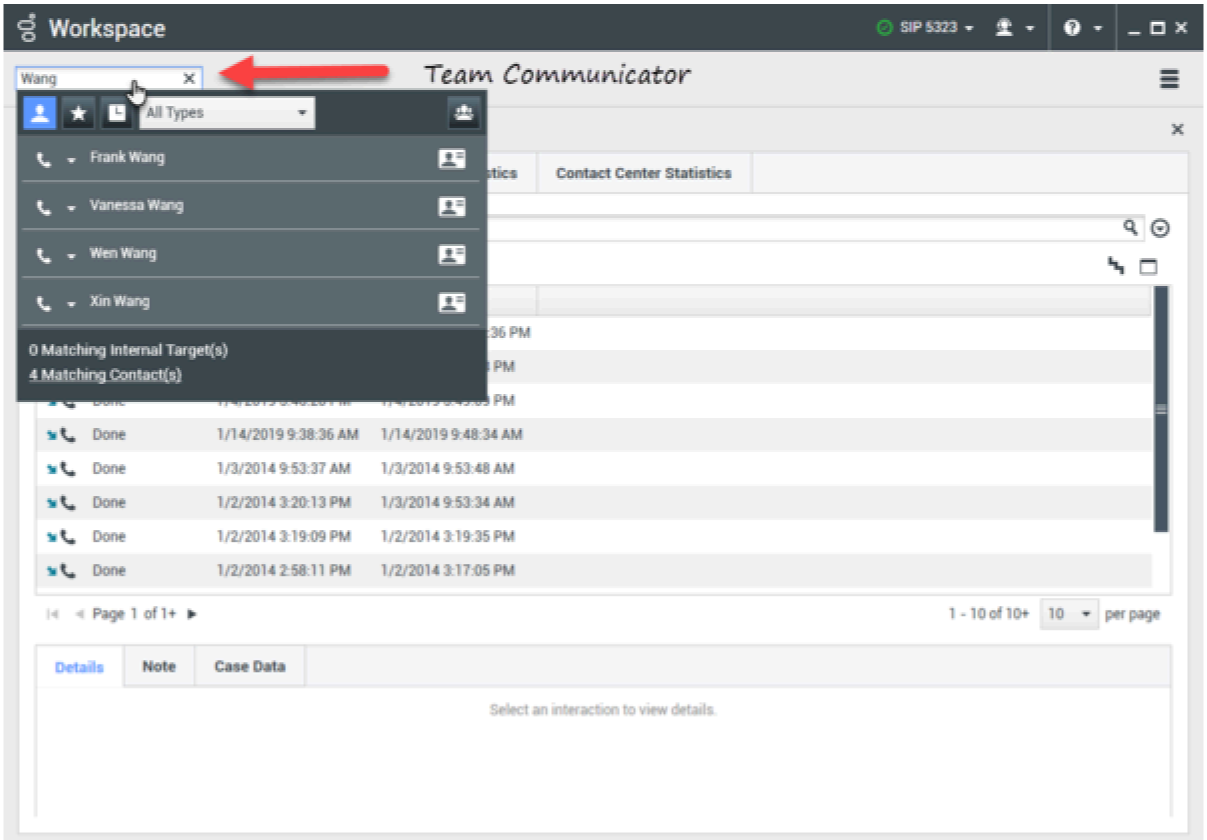
Team Communicator Overview

The Team Communicator feature is a universal lookup tool and dialer that searches all of the directories to which you are connected. Use the Team Communicator to find an internal target, such as a team member, Routing Point, agent group, skill, or interaction queue; or, if you are connected to the contact database, you can use it to find a contact.

The Team Communicator can filter the results of your search or group the results into categories to help you to quickly find the internal target or contact for whom you are searching.

Enter a name, telephone number, or email address to find an internal target or contact, and then select the action that you want to perform, such as:

- Calling (dialing) a contact
- Calling (dialing) an internal target
- Sending an Instant Message (IM) to an internal target
- Adding a contact to your list of favorites
- Conferencing an interaction
- Transferring an interaction
- Starting a consultation
- Sending an email message to a contact



Related Information

- Team Communicator help

Finding Contacts, Internal Targets, and Interactions

[**Modified:** 8.5.136.07]

Two different types of search routines are employed by Workspace to enable you to search for contacts and internal targets:

- Grid view in newer environments
- Grid view in older environments
- List view in older environments

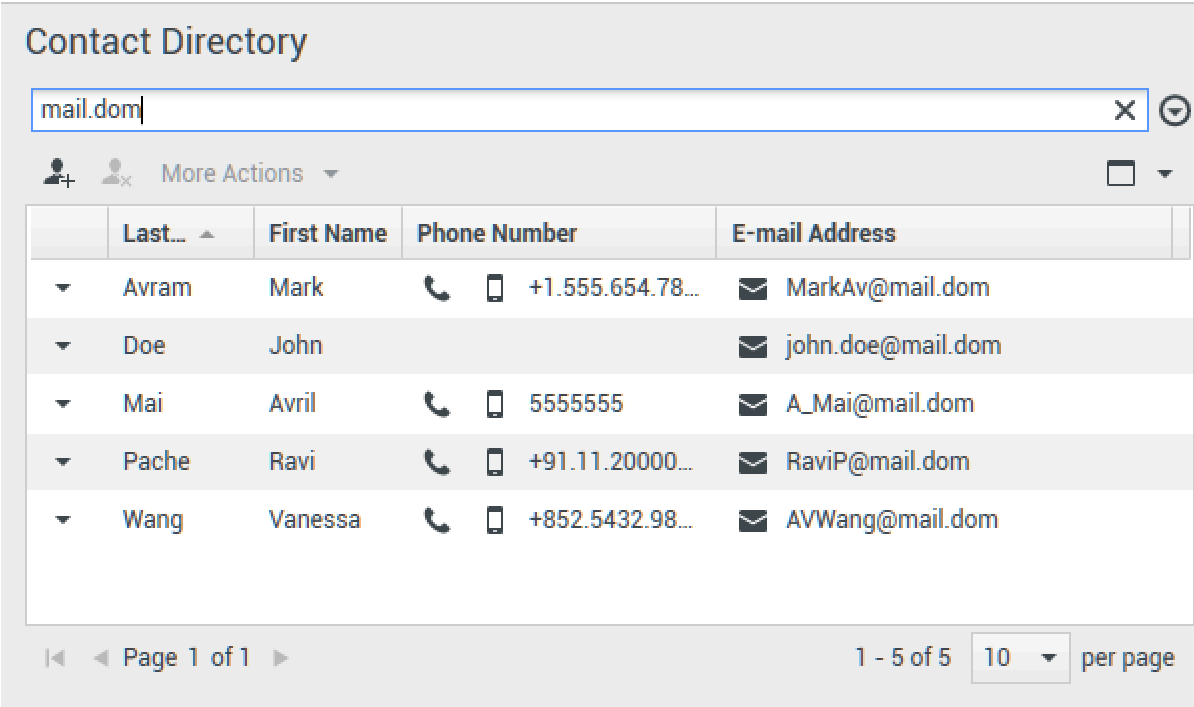
> **Tip**
> In some contact centers only one of the two views might be available. In this case, the **List** () and **Grid** () buttons are not displayed. (**Modified:** 8.5.105.12) In new environments, only Grid view is available.

Grid View in newer environments

[**Modified:** 8.5.136.07]

The Grid view in newer environments displays a sortable list of all of the contacts in the contact database that match the search criteria.

The search is a 'keyword' or 'phrase' search that searches each field of the contact database (name, phone number, email address, or other criteria) for the word or words that you provide in the search field. The search engine tries to match *any* word of each field specified in the search criteria (that are allowed by your administrator for Quick Search or that you manually specified for Advanced Search) of the database by using the selected matching mode 'starts with' in quick search, and 'starts with', 'is', or 'contains' in advanced search to search for the keyword(s) that you provide.



The following views employ the Grid View-mode search:

- **Contact History view/My History view** — See:
  - Lesson: Managing Contact History.

Grid View in older environments

Grid view performs a "starts-with" search that searches each field of the contact database for the phrase (name, phone number, email address, or other criteria) that you provide in the search field.

Results are returned in tabular form and are sorted according to the default search field, such as Last Name.

The following views employ the Grid View-mode search:

- **Contact History view/My History view** — See:
  - Lesson: Managing Contact History.

For more details on search results and the functionality in each window and view, see the *Workspace 8.5 Help*.

List view in older environments

List view performs a "keyword" search that searches each field of the contact database for the word or words (name, phone number, email address, or other criteria) that you provide in the search field. Each field of the database is searched by using a "starts-with" search for the keyword(s) that you provide.

In most cases, you can refine the search results by using the filtering features of the list view. For example, you can filter your search results so that only contacts or favorites are displayed.

Refer to the Contact Directory topic in the *Workspace Desktop Edition Help* for more information about search results.

The following views employ the List View-mode search:

- **Main Window** — See:
    - Team Communicator Overview.
    - Finding an Internal Target or a Contact.
    - Sending and Receiving Internal Instant Messages.
- **Voice Interaction Window** — See:
    - Starting a Voice Conference.
    - Transferring a Voice Call.
    - Blending a voice consultation with an IM consultation.
- **E-Mail Interaction Window** — See:
    - Starting a Voice Conference.
    - Transferring a Voice Call.
    - Blending a voice consultation with an IM consultation.
- **Chat Interaction Window** — See:
    - Starting a Voice Conference.
    - Transferring a Voice Call.
    - Blending a voice consultation with an IM consultation.
- **Workitem Interaction Window** — See:
    - Starting a Voice Conference.
    - Transferring a Voice Call.
    - Blending a voice consultation with an IM consultation.
- **Contact History view/My History view** — See:
    - Manage Contacts.

Related Information

- Contact History help
- Contact Search help
- Interaction History help
- Interaction Search help
- Team Communicator help

Role-Based Access Definition

The Genesys 8 suite of products implements role-based access to functionality (role privileges). Users are categorized by their role. The role that is assigned to you determines which role privileges (see Definition — Role Privilege) you are enabled to perform based on privileges assigned to your role.

Workspace comprises a set of Graphical User Interface (GUI) elements called views. The role that is assigned to you determines which Workspace views are enabled for you to use. The views enable you to complete your assigned tasks. For example, you might be configured for voice and chat but not email; you might be configured to transfer interactions and consult with other agents, but not to initiate new outbound interactions.

Examples of roles that might be enabled for some or all of the Workspace functionality include the following:

- Junior Agent
- Senior Agent
- Team Lead
- Supervisor
- Expert Agent

Related Information

- Team Leads and Supervisors
- Team Lead and Supervisor help

Role Privilege Definition

The Genesys 8 suite of products implement role-based access to functionality (role privileges). Users are categorized by their role. The role that is assigned to you determines which tasks you are enabled to perform. A role privilege is a single functionality or set of functionalities that are required to complete a Use Case (see Basic Use-Case Summary).

Workspace contains role privileges that are used to handle customer interactions, manage your status, view your KPIs, set personal preferences, and consult with team members.

Role privileges are made available through Views and Windows. Views contain the user-interface elements, such as buttons, menus, and text fields, that enable you to interact with Workspace. Views typically perform single functions, such as setting preferences, viewing KPIs, or viewing the history of an interaction. Windows contain views that are grouped into a single composite interface.

Basic Use-Case Summary

The purpose of this user's guide is to enable you to learn the *basic* functionality of Workspace. See the *Workspace 8.5 Help* for more details about each user-interface component. To access the context-sensitive Help from any window in the Workspace interface, open the Help menu, or press the F1 key on your keyboard.

This section summarizes the *high-level* steps that you might follow to handle a voice interaction.

> **Warning**
>
> During your use of Workspace, you might be locked out of Workspace and have your status set to Not Ready if you do not use your keyboard or mouse for an inactivity period that is defined by your administrator. If you are locked out of Workspace, you must reauthenticate and reset your status to Ready to receive new interactions. For more information, see the Inactivity Timeout topic in the *Workspace 8.5 Help*.

Prerequisites

To begin these role privileges your system must meet the following requirements:

- The Workspace ClickOnce application is installed on your local web server.
- The Workspace ClickOnce application is installed on your workstation.
- You are configured as an agent.
- Your workstation operating system is Windows Vista, Windows 7 or Windows 8.

Starting the Application and Handling an Inbound Interaction

Use a Microsoft Internet Explorer 8 or higher web browser to launch the Workspace bootstrap application. This bootstrap application enables you to login to your system and download the Workspace application.

1. Before you launch Workspace, if you are using a softphone (a headset connected to your workstation), make sure that your headset is plugged in.

   > **Important**
   >
   > When you log in to Workspace, the application is enabled for any headsets that are plugged into your workstation. If you want to use a different headset, exit Workspace, plug in the new headset, then relaunch Workspace.

2. Double-click the Workspace icon on your desktop to start the Workspace application.

3. Log in to the system (see Lesson: Logging in to Workspace).
4. Enter your additional authentication information.
5. Enter a media channel, or select one from the list.
6. In the Main Window set your status to Ready (see Lesson: Going Ready in the Workspace Main window).
7. Accept inbound interactions that are routed to you. See:
   - Lesson: Handling an inbound voice interaction
   - Lesson: Handling a web callback interaction
   - Lesson: Receiving an Instant Messaging session
   - Lesson: Handling an inbound email interaction
   - Lesson: Handling an inbound chat interaction
   - Lesson: Handling an inbound SMS interaction
   - Lesson: Handling an inbound workitem interaction
   - Lesson: Handling a predictive or progressive Outbound-Campaign voice interaction

   Or, retrieve an interaction from a workbin. See:
   - Lesson: Accessing and handling interactions that are stored in a workbin
8. Handle each inbound interaction. This step can include any or all of the following functions:
   - Start a voice, IM or chat consultation (see Lesson: Starting a voice conference or Lesson: Starting a chat consultation).
   - Transfer the call (see Lesson: Starting a voice transfer).
   - Conference the call (see Lesson: Starting a voice conference).
   - Update the Contact History (see Managing Contact History).
   - Update the Note (see Managing Contact History).
   - Send or receive an internal Instant Message (IM) (see Instant Messaging Overview).
   - Employ a Standard Response (see Inserting a Standard Response into an E-Mail Interaction).
9. Complete the interaction.
10. If required, enter a disposition code (see Assigning Disposition Codes).
11. Click `Mark Done`.
12. Complete any required aftercall work.
13. Click the close box to close the corresponding Interaction window.
14. Set your status to Ready (see Lesson: Going Ready in the Workspace Main window).

15. View your Key Performance Indicators (KPIs) or the KPI status of your group (see Lesson: View KPIs And Statistics).
16. After you have completed all of your tasks for the day, select `Log Out` from the Main Menu.

Related Information

- Workspace Functionality Overview help
- Launching Workspace help
- Workspace Components, Features, and Controls help

Log In

[**Modified:** 8.5.114.08, 8.5.112.08, 8.5.108.11, 8.5.138.04]

In this lesson, you will learn how to launch the Workspace application from your workstation, provide authentication information, and log in to your system.

This lesson contains the following sections:

- Getting Started
- Changing Your Password
- Remote and Virtual Desktop Environments

Getting Started

To begin accepting interactions, you first must be authenticated on your network, and then you must log in to your system. The following procedure describes how to start Workspace and authenticate yourself on the system.

Lesson: Logging in to Workspace

Purpose: To authenticate yourself on the system and choose your channels.

Prerequisites

- Your workstation is running a supported operating system.
- Your workstation has a supported browser application installed.
- Your account is configured as an agent.
- Workspace is installed on your workstation.

Start

1. (SIP only) Plug in your USB headset.

> **Warning**
> Depending on the configuration of your environment, your volume settings from your previous session might be retained when you log out, and they are used when you log in.

Important

When you log in to Workspace, the application is enabled for any headsets that are plugged into your workstation. If you want to use a different headset, exit Workspace, plug in the new headset, then relaunch Workspace.

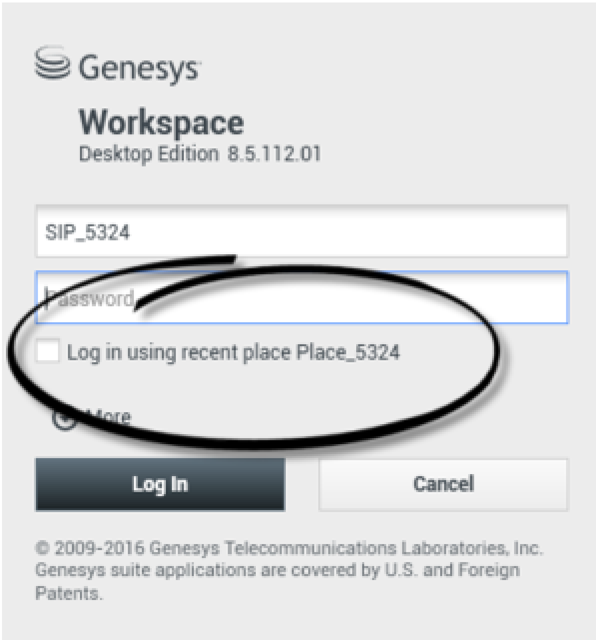
2. Start the Workspace application by doing one of the following steps:
   - Double-click the Workspace icon on your workstation desktop.
     

   - Open the `Start` menu and choose `Workspace` from the `Genesys Telecommunications Laboratories` program group.
   - Select the Workspace ClickOnce web link that was provided to you by your system administrator.

Important

When you launch Workspace, the application might automatically update. Depending on how your system is configured, you might have the opportunity to reject the update. If you do not accept the update, it will be offered to you again the next time that you login.

3. In the Login view, enter your user name and password (see the Initial login view figure). If you do not know what information to enter in the login screen or if you have multiple accounts, each for a different purpose, contact your supervisor or administrator to determine what login information to use.



Initial login view

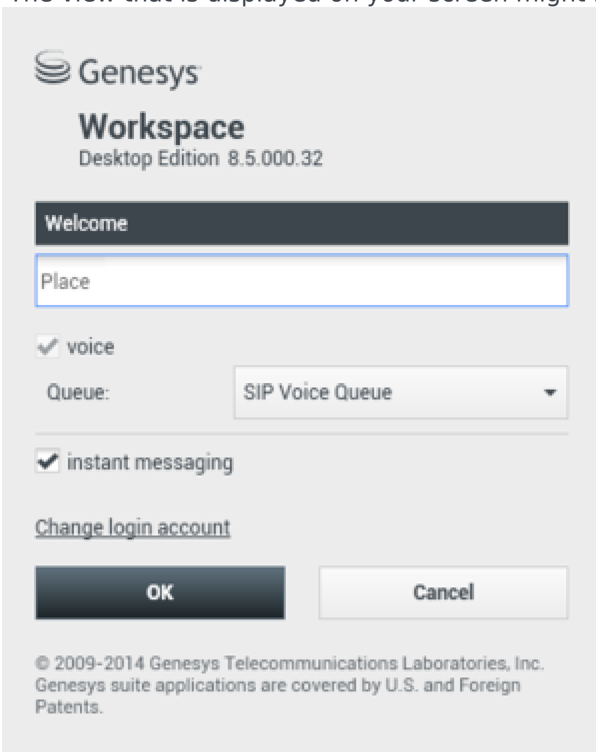
> **Important**
>
> If you are working in a Single-Sign On Environment, you will not have to login to Workspace. In a Single Sign-On environment, after you launch Workspace and the splash screen is displayed, the Advanced Login Parameters view or the main window is displayed. Skip to step 5 or step 7.

In some cases, you might be required to enter additional information about the application that you want to use and about the host and port from which the application is being served. For more information, see your system administrator and the *Workspace 8.5 Help*.

> **Warning**
>
> Depending on the configuration of your environment, if you login to a SIP Voice channel without having your configured USB headset plugged in, you might be logged in to Workspace, but not to the SIP Voice channel. To complete logging in to the SIP Voice channel, plug in your USB headset.

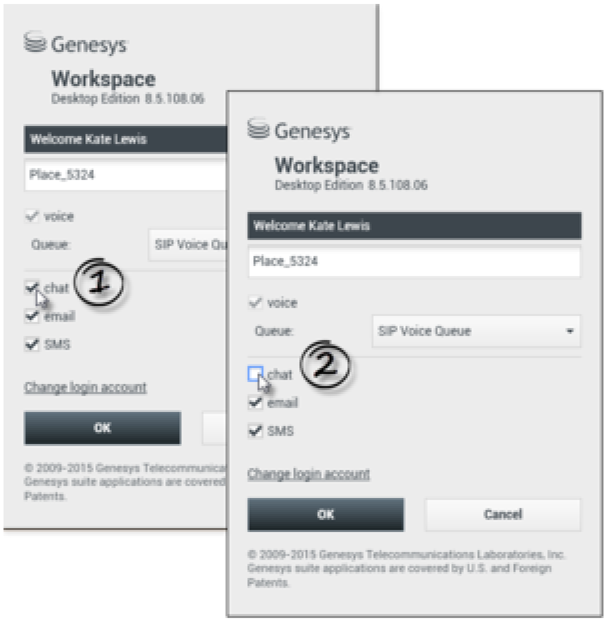
4. Check or keep checked `Log in using recent place` if the Place name that is displayed in the Login view is the same as the Place (phone set and workstation) where you currently sit; it will be displayed in the Login view if you typed it in the last time you logged in from this same Place). Uncheck this selection if you do not always use the same phone set and workstation and the displayed Place name does not match the Place name where you are sitting. In this case, you must enter extra information in the second log in view to make sure that when calls are directed to you, they ring on the phone where you are working instead of on a phone that you previously logged in to.
5. Click `Log In` to log in, or click `Cancel` to stop logging in; this closes the Login view.
6. After you have successfully authenticated, a new view opens in which you can specify additional information, based on the tasks that you want to perform. The contents of the view are defined by your

administrator; they are specific to your role. Additional information that you might have to specify includes your Place, your queue, your agent login, your agent password, your phone number, and the media (such as Voice, Instant Messaging, or workitems, such as faxes) that you want to use. The "Example of the System Parameters login view" figure shows an example of a secondary login view. The view that is displayed on your screen might be different.



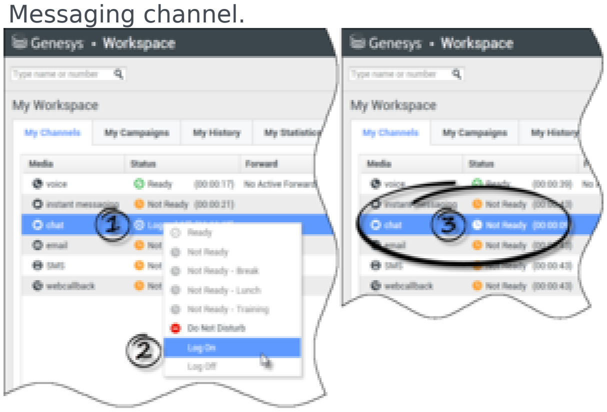
Example of the System Parameters login view. Your view might be different.

- If you do not always sit at the same Place (phone set and workstation), or if you did not check Log `in using recent place` in the first login view, you should verify that you enter the correct Place in the Place field. If the Place is incorrect, calls might be directed to a different phone set at a different workstation.
- In some environments, agents have more than one Place to choose from when specifying their Place during log in. For example, they might log in from their workstation in the office one day and from their home phone or mobile the next. If this is the set up in your environment, your administrator or supervisor will give you different Place names to use depending on what phone you are using to login to Workspace. Enter the Place in the **Place** field of the second login window. [**Added:** 8.5.138.04]
- Your contact center might use Place Groups as well as Places for login. Refer to Logging in to a Place Group for more information. [**Added:** 8.5.114.08]
- Your account might be configured to check and uncheck eServices media channels, such as chat, SMS, email, social media (for example, Facebook and Twitter), and workitems (such as fax). Upon login, unchecking media channels for which your account is configured means that you will not be logged into those channels when Workspace starts.



If you will not use a specific channel, you can uncheck it in the login window (if your account is configured for this capability)

You will have to login to those channels manually from the Workspace view in the Main Window. Note: If you are logging in to participate in an Outbound Campaign, you must unselect the Instant Messaging channel.

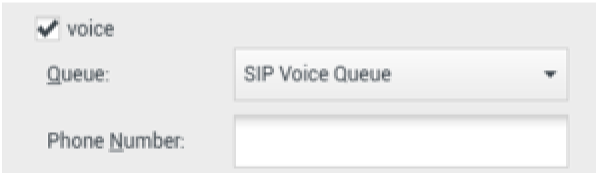


To log on a channel, right-click it and select Log On from the menu

Important

If you are logging in to participate in an Outbound Campaign, you **must** *un*select the Instant Messaging channel.

- If your company is using a SIP Server, your account might be configured to log in by using a remote phone number at which you can be reached if you are not logged in from a phone that is on the internal phone system of your company (see the Remote phone number field in the System Parameters login view figure).
  If you are logging in remotely, enter the remote phone number to which your calls will be routed in the `Phone Number` box in the System Parameters Login view.



Remote phone number field in the System Parameters login view

7. Click OK to submit your information. Click `Cancel` to stop logging in; this closes the Login view.
8. If authentication is successful, the Main Window view is displayed. If your status is configured to be set to Ready by default, you are ready to receive interactions that are routed to you. Your system administrator specifies what your status is for each channel when you login. If your account is configured to be `Not Ready` for one or more channels, your system administrator might specify a `Not Ready Reason` for the channel. To start receiving interactions on a Not Ready channel, you must change the status to Ready.

End

Next Steps

- Set your status to Ready. See Lesson: Going Ready in the Workspace Main window.

Changing Your Password

There are a number of reasons why you might have to or want to change your Workspace login password. For reasons that are related to the security of your company, your account might be configured so that your password expires automatically after a specified number of days. For your personal security, your account might be configured with a temporary password when the account is assigned to you, and you might be required by your system administrator to change your temporary password before you can login to Workspace for the first time. You might also want to change your Workspace login password for other reasons -- for example, your company might not have a specific policy about how often your password should be changed or you might have accidentally revealed your password to an unauthorized person.

In all of these scenarios, you use the Workspace Change Password dialog box to change your password. Consult with your system administrator about the specific password security policy that your company implements.

Lesson: Changing your Workspace password

Purpose: To change your Workspace system login password.

Prerequisites

- Your workstation is running a supported operating system.
- Your workstation has a supported browser application installed.
- Your account is configured as an agent.
- Workspace is installed on your workstation.

Start

1. To manually change your password, from the `Main Menu`, select `Change Password`. The `Change Password` dialog box is displayed. Perform the following steps:
    a. Enter your current password in the `Old Password` field.
    b. Enter your new password in the `New Password` field.
    c. Enter your new password again in the `Confirm Password` field.
    d. Click `OK` to change your password or click `Cancel` to close the dialog box without changing your password. If you made any errors, after you click `OK` you will be asked to re-enter the information. If you entered all of the information correctly, your password is changed to the new password that you specified.
2. If you are required to change your password by your administrator, the `Change Password` dialog box is displayed automatically. Perform the following steps:
    a. Enter your new password in the `New Password` field.
    b. Enter your new password again in the `Confirm Password` field.
    c. Click `OK` to change your password or click `Exit` to close the dialog box and quit Workspace without changing your password. If you made any errors, after you click `OK` you will be asked to re-enter the information. If you entered all of the information correctly, your password is changed to the new password that you specified.

Remote and Virtual Desktop Environments

[**Added:** 8.5.109.16]

You might work in an environment that uses Virtual Desktop Infrastructure (VDI) to run Workspace. This means that when you start Workspace, it is displayed on your screen, but it is not actually running on your workstation, it is running on a remote machine.

In VDI environments, your administrator installed the Workspace Standalone SIP Endpoint on your workstation before you logged in, or, you were instructed to install it by clicking on an installation hyperlink in an email or other document.

When you start your workstation, the Workspace Standalone SIP Endpoint automatically launches and the Workspace SIP Endpoint icon () is displayed in your system tray. Until you log in to Workspace, this icon is grey.

After you launch Workspace, the Workspace SIP Endpoint icon turns red () to indicate that it is active.

Troubleshooting Workspace SIP Endpoint

In the event that your Workspace environment loses connection to the Workspace SIP Endpoint, a message might be displayed asking you to start the Workspace SIP Endpoint application. You can start the Workspace SIP Endpoint by selecting the Workspace SIP Endpoint application in the **Start** menu of your workstation.

If you are instructed to do so, you can stop the Workspace SIP Endpoint by right-clicking on the icon in the system tray and then selecting **Exit** from the pop-up menu.

Related Information

- Login help

Main Window Basics

In this lesson, you will learn how to use the Main Window docking and auto-hide features.

This lesson contains the following sections:

- Docking the Main Window
- Auto-hiding the Main Window

Main Window Overview

Link to video

Main Window Tips & Tricks

Link to video

Resizing the Main Window

Link to video

Docking the Main Window

If your administrator has enabled these features, you can dock the Workspace Main Window toolbar at the top of your desktop (monitor display) so that it is always accessible at the top of your display. If you turn on the auto-hide feature, the Main Window toolbar "rolls up" to reveal your entire desktop area.

Lesson: Docking the Main Window

Purpose: To dock the Workspace Main Window at the top of your desktop.

Prerequisites

- Your workstation is running a supported operating system.
- Your workstation has a supported browser application installed.
- You are configured as an agent.
- Workspace is installed on your workstation.
- You are logged in to Workspace.

Start

1. Click and hold on the Workspace Main Window title bar.

2. Drag the title bar to the top of your display, double-click the title bar, or click **Maximize**.
   The Main Window will automatically become docked to the top of your desktop display area. When the Main Window is docked, your effective desktop area is reduced by the width of the Main Window. Any open windows, including maximized windows, on your desktop are moved down to accommodate the Workspace Main Window. When the Main Window is docked, the Minimize and Maximize buttons are disabled.

   > Tip
   >
   > To move the Main Window to the top of your display without docking, hold the **Ctrl** key while dragging the title bar.

3. To undock the Main Window, click and drag it away from the top of your display. Your desktop area returns to full size and the Workspace Main Window returns to the size it was before you docked it.

Auto-hiding the Main Window

Lesson: Auto-hiding the Main Window

Purpose: To hide the Workspace Main Window when it is docked to increase the size of the desktop work area.

> Important
>
> If another toolbar that is docked at the top of the screen is already in auto-hide mode, you cannot enable the Workspace Main Window auto-hide mode. If you try to enable the auto-hide mode, the following message is displayed: "You cannot auto-hide the Main Window here. Another window is already in auto-hide mode on this edge of your display."

Prerequisites

- Your workstation is running a supported operating system.
- Your workstation has a supported browser application installed.
- You are configured as an agent.
- Workspace is installed on your workstation.
- You are logged in to Workspace.
- You have docked your Main Window.

Start

1. When the Workspace Main Window is docked, you can choose to enable the auto-hide feature. Select

Auto-Hide the Main Window from the **Main Menu** or from the Workspace menu in the System Tray. In Auto-Hide Mode, the Workspace Main Window is hidden at the top of the display and the desktop area returns to full size when Workspace is not the active application.

2. To hide the Workspace Main Window, click your desktop or in another application window.
3. To display the Workspace Main Window when it is hidden, do one of the following actions:
    - Click the Workspace Task Button in the Task Bar
    - Move your mouse pointer to the top of your desktop display area
4. To disable the auto-hide feature, de-select **Auto-Hide the Main Window** from the **Main Menu** or from the Workspace menu in the System Tray.

Related Information

- Main Window help: This article includes detailed information about all the options for customizing the appearance and behavior of the Main Window, including what to do if Workspace always covers other windows.

Manage Your Status

[**Modified:** 8.5.108.11, 8.5.139.06]

In this lesson, you will learn how to manage your status in the Main Window. This lesson contains the following section:

- Going Ready

Link to video

Warning

- **Inactivity Timeout**: You might be locked out of Workspace and have your status set to Not Ready if you do not use your keyboard or mouse for an inactivity period that is defined by your administrator. If you are locked out of Workspace, you must reauthenticate and reset your status to Ready to receive new interaction. For more information, see the Inactivity Timeout topic in the *Workspace 8.5 Help*.
- **Locking your workstation**: If you lock your workstation with or without first setting your status to Not Ready, your administrator might have set up your account to automatically change to Not Ready, with or without a Not Ready Reason. When you unlock your workstation, your status will remain in the Not Ready state until you set it to Ready. [**Added:** 8.5.139.06]

Going Ready

To begin accepting interactions, you must set your status to Ready. The following procedure describes how to set your status to Ready, so that you can receive interactions.

Lesson: Going Ready in the Workspace Main window

Purpose: To set your status to Ready, so that you can receive interactions.

Prerequisites

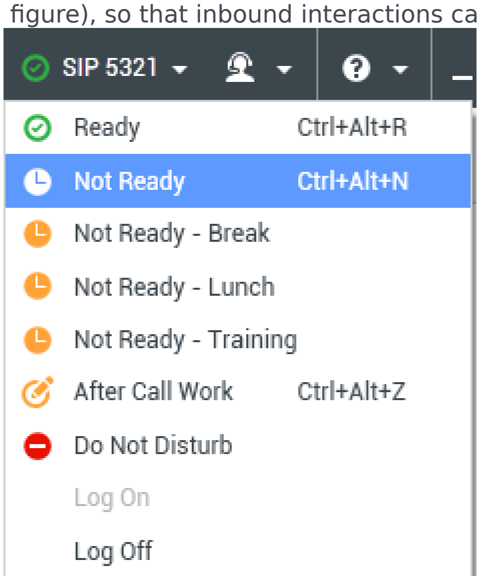
- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- (SIP only) Plug in your USB headset. If you login to a SIP Voice channel, Workspace checks to determine whether the USB headset that you are configured to use is plugged in. If it is not, you will be logged in to Workspace but not to the SIP Voice channel. Ensure that you plug in your USB Headset to use the SIP Voice channel.

Workspace detects when your USB headset is plugged in or unplugged and will set your status accordingly. If your USB headset is not plugged in a message will be displayed.

Tip
Some environments are configured to change your status automatically. For example, your status might change from After Call Work to Ready when you mark an interaction as Done.

Start

1. If your status is configured to be set to Ready by default, you receive interactions that are routed to you as soon as you log in.
2. Otherwise, click the Status icon to change your status to Ready (see the Example of a Status menu figure), so that inbound interactions can be routed to you.



Example of a Status menu

You can also choose to set your status to a different Not Ready Reason, such as:

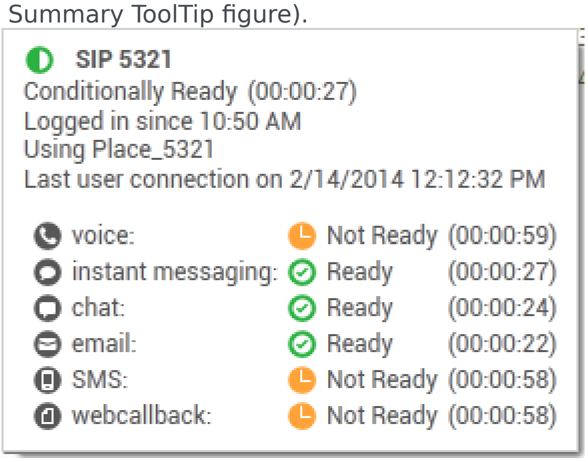
- `Not Ready`
- `Not Ready - Lunch`
- `Not Ready - Break`
- `After Call Work`

The `Not Ready` Reasons that are displayed in your `Global Status` menu depend on how this menu has been configured by your system administrator. In most cases, if you have set your status to one of the `Not Ready` states, inbound interactions cannot be routed to you.

Warning
When you are handling an interaction, the system interrupts the display of the amount of time that you are in

> the current state. Warning: If, while you are handling an interaction for a given channel, you set your status to either `Not Ready`, `Not Ready - <reason>`, or `After Call Work` (ACW), the system does not display the amount of time that you are in that state until the interaction is complete. This feature enables your break or ACW time to be displayed according to recorded statistics.

3. You can check your ready status by placing your mouse pointer over the Status icon (see the Status Summary ToolTip figure).



Status Summary ToolTip

The status summary includes your login name, Place, channels, and channel status.

If you are logged in to more than one channel, detailed status for each channel is displayed; otherwise, only your ready status is displayed. You can use the **Global Status** menu to log on to all channels that are logged off, or to log off from all channels without logging out.

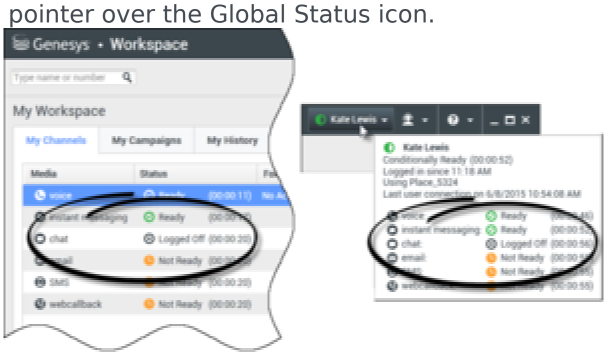
If you are participating in an Outbound Campaign and are waiting for authorization to logout, you can check the status of your request in the Status Summary ToolTip.

4. If you are logged in to more than one channel, you can manage the ready status of each channel individually by using the `My Channels` tab in the Workspace of the Main Window.

   a. In the Main Window, click the **Access and use Workspace supporting views** button (☰) to display the **Supporting Views** menu, then select **My Channels**.

   b. You can use the My Channels tab to log on and log off individual channels (**Note:** This feature might not be available in your environment). Right-click the channel that you want to update, and set your status by using the `Status` menu for that channel, similar to what you did in Step 2.

   To see what channels are logged on or off, either open the My Channels tab or hover your mouse pointer over the Global Status icon.



You can use the My Channels tab or the Global Status icon to determine which channels are logged on or off

End

Related Information

- Manage Status help

Forward Your Calls

In this lesson, you will learn how to forward your call by using the `My Channels` tab in the Main Window. This lesson contains the following section:

- Forwarding Calls

> **Tip**
> Your administrator might not enable the **Forward** column in your environment.

Forwarding Calls

You can forward your calls to a different destination.

Lesson: Forwarding your calls to a different destination

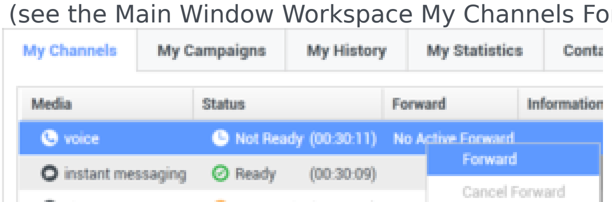
Purpose: To specify a different destination to which your calls are directed temporarily and to cancel a forward.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).

Start

1. To forward calls to a different destination, in the Main Window, Click the **Access and use Workspace supporting views** button (☰) to display the **Supporting Views** menu, then select **My Channels** to display the `My Channels`tab.
2. On the media channel that you want to forward, right-click in the `Forward` column, and select `Forward` (see the Main Window Workspace My Channels Forward menu figure).



Main Window Workspace My Channels Forward menu

   The `Forward` dialog box is displayed.
3. Enter the phone number to which you want to forward your calls.
4. Click `Apply` to set the forward. Click `Cancel` to return to the `My Channels` tab without forwarding your calls.

Canceling Your Call Forward

5. If you have an active forward set and you want to disable it, in the `My Channels` tab, right-click in the `Forward` column and select `Cancel Forward`. The `Cancel Forward` dialog box is displayed.
6. Click `Apply` to cancel the forward. To keep the forward active, click `Cancel`; this action removes the active forward and changes the `Forward` status to `No Active Forward`.

End

Related Information

- Forwarding calls help

Find A Contact Or An Internal Target

[**Modified:** 8.5.118.10]

In this lesson, you will learn how to use the Team Communicator feature to find a contact or an internal target in your contact database or company directory. This lesson contains the following sections:

- Finding an Internal Target or a Contact
- Using Favorites

Finding an Internal Target or a Contact

If you want to find an internal target in your company directory, or if you want to find a contact in the contact database, use the Team Communicator feature of the Workspace Main Window.

The Team Communicator feature enables you to find an internal target or a contact by entering basic information about that contact, such as name, phone number, or email address. Use the filtering and sorting functions to quickly find the person that you want to contact. Save the contact as a favorite to find the contact even more quickly the next time that you want to contact them.

The procedures in this lesson demonstrate using the Team Communicator to start a voice interaction; however, the lessons are applicable to any media that an agent is configured to use. These lessons focus on initiating voice interactions; however, you can use these same techniques to create a new email, send an IM, or transfer any type of interaction.

Lesson: Using the Team Communicator feature to find an internal target

[**Modified:** 8.5.118.10]

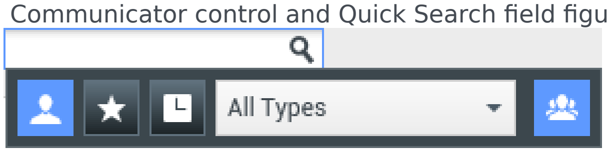
Purpose: To find an internal target in the corporate directory.

Prerequisites

- You are logged in to Workspace (see Lesson: Going Ready in the Workspace Main window).

Start

1. In the Main Window, click in the Team Communicator `Quick Search` field (see the Main Window Team Communicator control and Quick Search field figure).

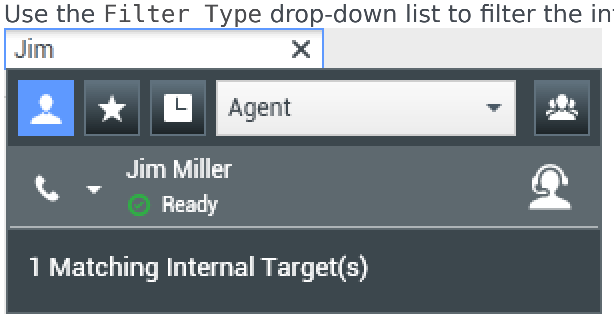


Main Window Team Communicator control and Quick Search field

The `Quick Search` field is a universal lookup tool. It might be configured to provide lookup in the Universal Contact Server or simply internal target lookup.

The Team Communicator is available in other windows, such as the Voice Interaction window and the E-Mail Interaction window, in which it can be used to find conference and transfer targets. The actions that are available to you depend upon which window you are using, which role you are assigned, and what information is available about the target.

2. Enter the name, telephone number, or other information about the team member or other internal target whom you want to find. As you enter text, Workspace searches the internal and contact database and lists potential matches. A pop-up view lists potential contacts and indicates the status of each internal target. Click the X to clear the search field.
Below the `Quick Search` field are the following five controls (see the Main Window Team Communicator control and Quick Search field figure), from left to right:
   - `Search All`—Click to select from all matching internal targets and contacts.
   - `Show and Search My Favorites`—Click to show in the list only contacts/internal targets that either you or your system administrator has flagged as favorites.
   - `Show and Search My Recents`—Click to select from the last 1 to 10 contacts/internal targets whom you have contacted directly. Workspace might be configured by your administrator to store and display recent calls, including missed calls, in the Team Communicator view. When this feature is specified, recent voice interactions are displayed in the Team Communicator with a specific visual indicator (in/out/missed), and the tooltip for each record display additional information about the corresponding call event (for example: call type, call timestamp, and missed status, if applicable).
   - `Filter by Type`—Click to search by type, including `Agent`, `Agent Group`, `Contact`, `Queue`, `Routing Point`, and `Skill` (see Step 3).
   - `Sort Results by Type/Categories`—Click to arrange the search results by type/category.
3. Do one of the following to find an internal target:
   - Use the `Filter Type` drop-down list to filter the internal targets by type.



Example of Team Communicator search results with Agent filtering

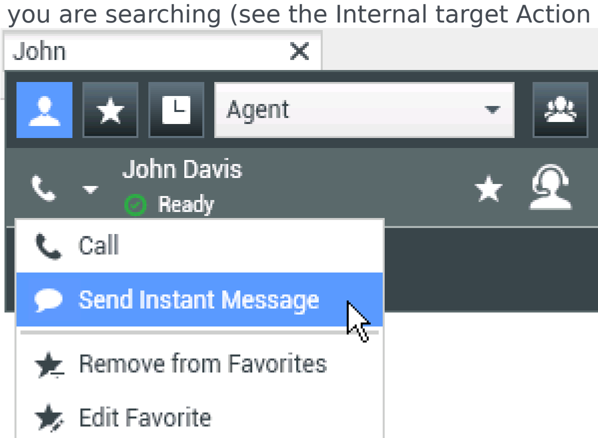
The filters that you see might include the following:

- `All Types`—Show all contacts and internal targets that contain the specified search criteria.
- `Contact`—Show contacts that contain the specified search criteria.
- `Agent`—Show only agents that contain the specified search criteria.
- `Skill`—Show only skills that contain the specified search criteria.
- `Agent Group`—Show only agent groups that contain the specified search criteria.
- `Queue`—Show only queues that contain the specified search criteria.
- `Interaction Queue`—Show only interaction queues that contain the specified search criteria.

- `Routing Point`—Show only Routing Points that contain the specified search criteria.

- Toggle sorting by type/category on or off by clicking the `Sort Results by Type/Categories` folder icon: 

4. Click the `Action Menu` drop-down list that is displayed next to the icon of the internal target for whom you are searching (see the Internal target Action menu figure).



Internal target Action menu

To perform an action, do one of the following:

- Select the type of internal interaction that you want to launch:
  - Voice interaction (see Calling an internal target)
  - Voicemail call — you might be able to call the voicemail box of an agent or agent group by selecting the Voicemail icon (). [**Added**: 8.5.118.10]
  - Instant Messaging (IM) interaction (see Handle Internal Instant Messaging)
- Select `Add to Favorites` to add the contact to your list of favorite contacts.
- Place your mouse pointer over the contact icon to view additional contact information.

End

Lesson: Using the Team Communicator feature to find a contact

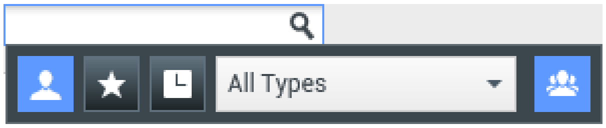
Purpose: To find a contact in the contact database.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have a connection to the contact database.
- You are configured for outbound communication.

Start

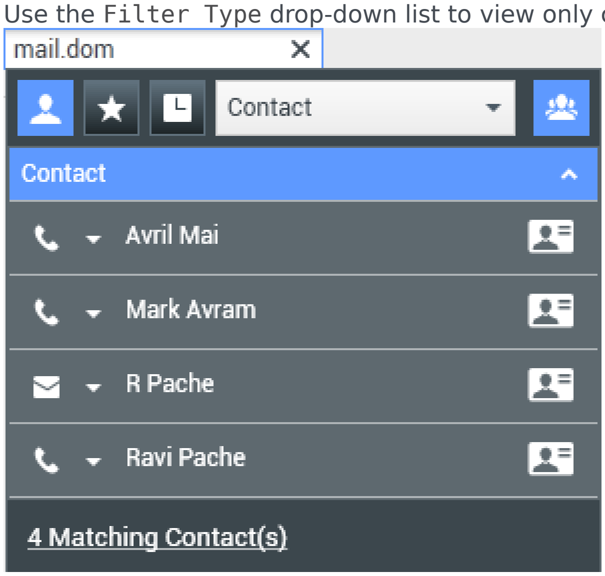
1. In the Main Window, click the Team Communicator `Quick Search` field (see the Main Window Team Communicator control and Quick Search field figure).



Main Window Team Communicator control and Quick Search field

The `Quick Search` field is a universal lookup tool. You must be configured for outbound communication to use the Team Communicator for lookup in Universal Contact Server.

2. Enter the name, telephone number, or other information about the contact with whom you want to communicate. As you enter text, Workspace searches the internal and contact database and lists potential matches. A pop-up view lists potential contacts and indicates the status of each internal target.
   Below the `Quick Search` field are the following five controls (see the Main Window Team Communicator control and Quick Search field figure), from left to right:
   - `Search All`—Click to select from all matching internal targets and contacts.
   - `Show and Search My Favorites`—Click to show in the list only contacts/internal targets that are flagged as favorites by either you or your system administrator.
   - `Show and Search My Recents`—Click to select from the last 1 to 10 contacts/internal targets whom you have contacted directly. Workspace might be configured to display recently missed calls; if so, calls that were directed to you that you did not answer are also displayed.
   - `Filter by Type`—Click to search by type, including `Agent`, `Agent Group`, `Contact`, `Queue`, `Routing Point`, and `Skill` (see Step 3).
   - `Sort Results by Type/Categories`—Click to arrange the search results by type/category.
3. Do one of the following to find the contact:
   - Use the `Filter Type` drop-down list to view only contacts by selecting `Contact`.



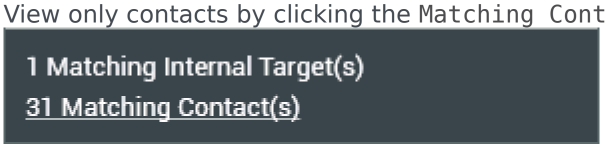
Example of Team Communicator search results with Contact filtering

The filters that you see might include the following:

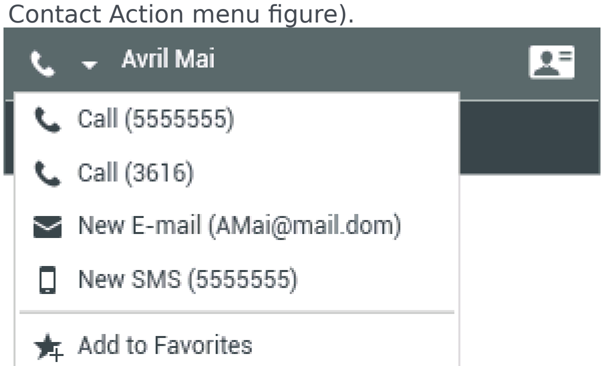
- `All Types`—Show all contacts and internal targets that contain the specified search criteria.
- `Contact`—Show contacts that contain the specified search criteria.

    - `Agent`—Show only agents that contain the specified search criteria.
    - `Skill`—Show only skills that contain the specified search criteria.
    - `Agent Group`—Show only agent groups that contain the specified search criteria.
    - `Queue`—Show only queues that contain the specified search criteria.
    - `Interaction Queue`—Show only interaction queues that contain the specified search criteria.
    - `Routing Point`—Show only Routing Points that contain the specified search criteria.

- Toggle sorting by type on or off by clicking the `Sort by Types/Categories` folder icon: 
- View only contacts by clicking the `Matching Contacts` link:



4. Click the `Action Menu` drop-down list that is next to the contact for whom you are searching (see the Contact Action menu figure).



Contact Action menu

To perform an action, do one of the following:

- Select the telephone number to launch a Voice interaction (see Lesson: Calling a contact).
- Select the email address to launch a new email interaction (see Lesson: Creating and sending a new email interaction to a contact).
- Select the SMS number to launch an SMS interaction (see Lesson: Creating an outbound SMS interaction).
- Select `Add to Favorites` to add the contact to your list of favorite contacts.
- Place your mouse pointer over the contact icon to view additional contact information.

End

Using Favorites

You can designate internal targets and contacts as "favorites" by using the `Action Menu` of the Team Communicator. A *favorite* is an internal target or contact whom you call frequently, or whom you want to be able to find quickly.

When you designate an internal target or contact as a favorite, you might be configured to assign that contact to a favorite category. Favorite categories might be pre-defined by your administrator, or you might be configured to create your own categories. Corporate favorites are read-only.

If you are using the Team Communicator in an interaction window, the corporate favorites that you see might be different from the corporate favorites that are displayed in the Team Communicator in the Main Window. Your administrator might configure your system to display corporate favorites that are related to the interaction.

Lesson: Creating and using favorites in the Team Communicator

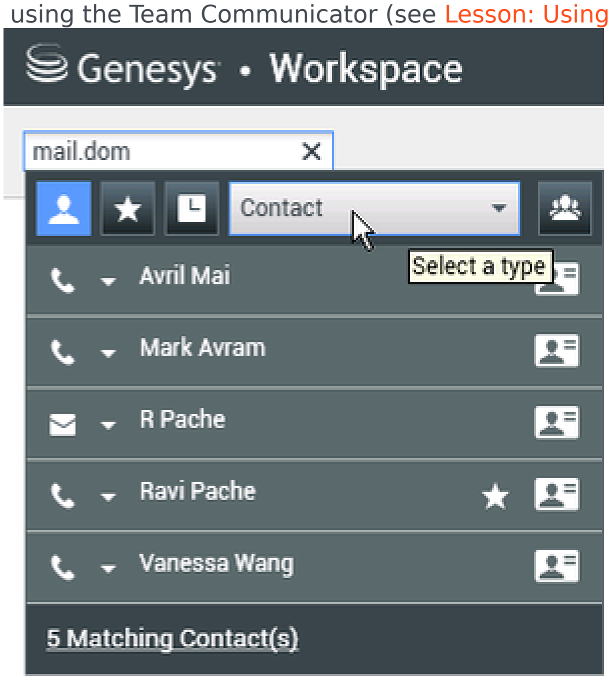
Purpose: To designate as a favorite a contact or an internal target whom you call frequently, or whom you want to be able to find quickly.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).

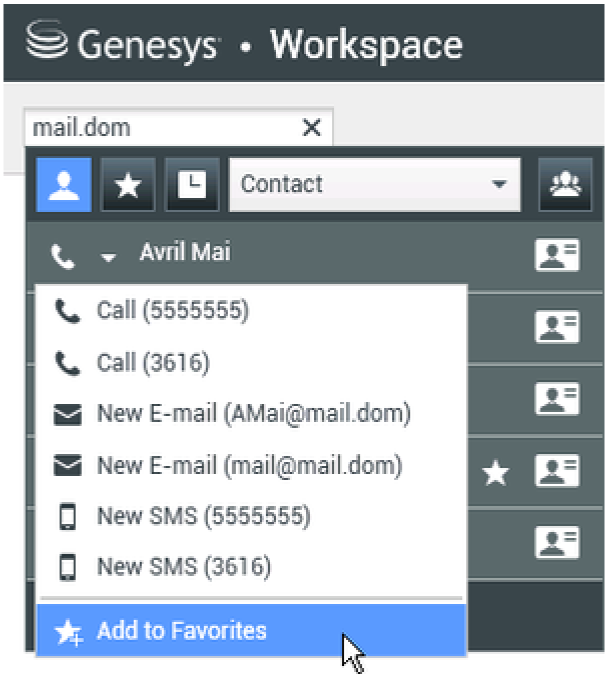
Start

1. Find an internal target or contact (refer to the Finding a contact by using Team Communicator figure) by using the Team Communicator (see Lesson: Using the Team Communicator feature to find a contact).



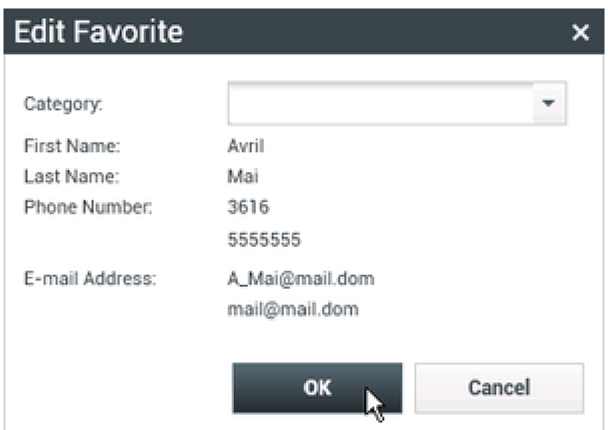
Finding a contact by using Team Communicator

2. Open the internal target or contact `Action Menu` and select `Add to Favorites` (refer to the Contact Action Menu Add to Favorites option figure).



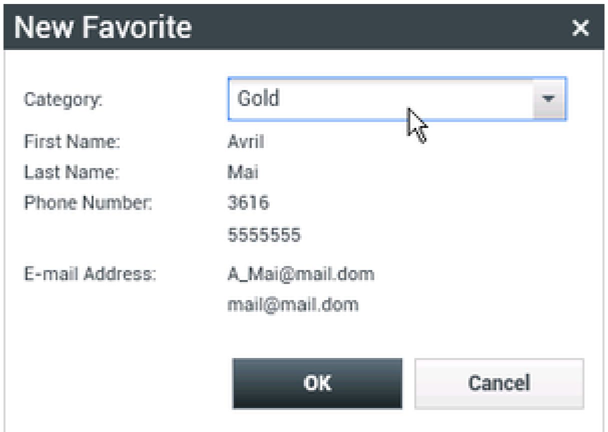
Contact Action Menu Add to Favorites option

The `New Favorite` dialog box is displayed (refer to the New Favorite dialog box figure).



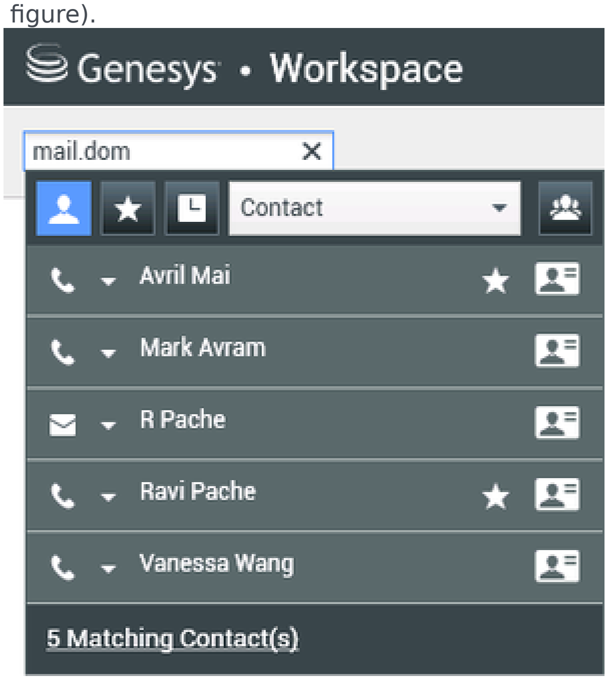
New Favorite dialog box

3. (Optional) The `New Favorite` dialog box enables you to specify a category for your new favorite. Do one of the following:
   - Select a pre-defined category from the `Category` drop-down list (refer to the Specifying a category in the New Favorite dialog box figure). Pre-defined categories might be defined by your administrator, or you might have created one previously.
   - Create a new favorite category. In the `Category` drop-down list (refer to the Specifying a category in the New Favorite dialog box figure), enter a new category name.



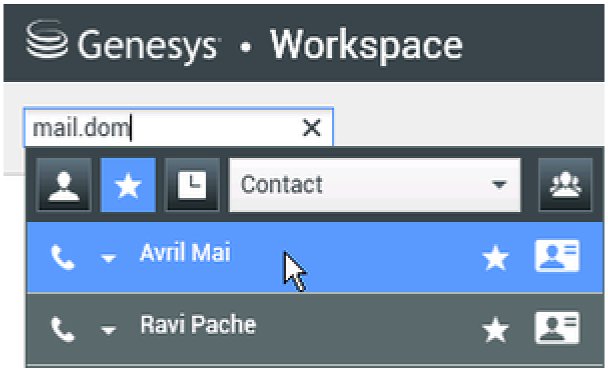
Specifying a category in the New Favorite dialog box

4. Click OK to create a new favorite. Click `Cancel` to close the `New Favorite` dialog box without creating a new favorite. If you created a new favorite, she or he will be displayed with a star next to the name of the internal target or contact (refer to the Contact designated as a favorite in the Team Communicator figure).



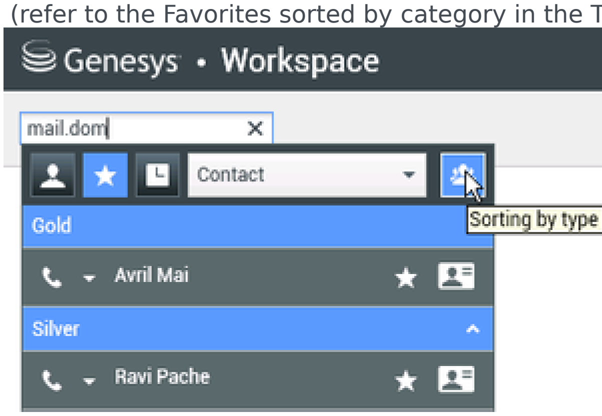
Contact designated as a favorite in the Team Communicator

5. In the Team Communicator, to view only favorites whom you have specified () or who have been specified by your administrator () click the `Favorites` filter button () in the Team Communicator control panel (refer to the Favorite filtering in the Team Communicator figure).



Favorite filtering in the Team Communicator

6. To view your favorites by category, click both the `Favorites` filter button and the `Categories` button (). The favorites are sorted into the categories that either you or your administrator has defined (refer to the Favorites sorted by category in the Team Communicator figure).



Favorites sorted by category in the Team Communicator

7. You can edit a favorite to add, remove, or change a category. Select **Edit Favorite** () from the **Action Menu** to display and use the **Edit Favorite** dialog box.
You can remove an internal target or a contact from your list of favorites by selecting **Remove from Favorites** () from the **Action Menu**.
Notes:
   - You cannot edit or remove Corporate Favorites. These favorites are controlled by your administrator.
   - If you added a target as a Personal Favorite and then your administrator adds this same target as a corporate favorite, that target will be designated as a Corporate Favorite in the flat view, and as both a Personal Favorite and Corporate Favorite in the categorized view.

End

Related Information

- Team Communicator help

Handling Interactions

[**Modified:** 8.5.146.06]

These lessons show you how to handle interactions of various types. Some types, such as Voice and Chat, enable you to transfer, conference, or consult with another target in your contact center. The **Common Interaction Management** tasks enable you to use functionality that is common to many of the interaction types.

This topic contains the following sub-topics:

- **Voice Interactions**
  - Handle Voice and Voice with Video Interactions
  - Handle A Voice Consultation
  - Transfer A Voice Call
  - Conference A Voice Call
  - Record Interactions
- **Callback**
  - Handle Genesys Callback Interactions
  - Handle Web Callback Interactions
- **Outbound Campaigns**
  - Handle Outbound-Campaign Voice Interactions
- **IM Interactions**
  - Handle Internal Instant Messaging
- **Chat Interactions**
  - Handle A Chat Interaction
  - Handle A Chat Consultation
  - Transfer A Chat Interaction
  - Conference A Chat Interaction
  - Handle an Altocloud Chat Interaction
- **E-mail Interactions**
  - Handle An E-Mail Interaction
- **SMS Interactions**
  - Handle An SMS Interaction

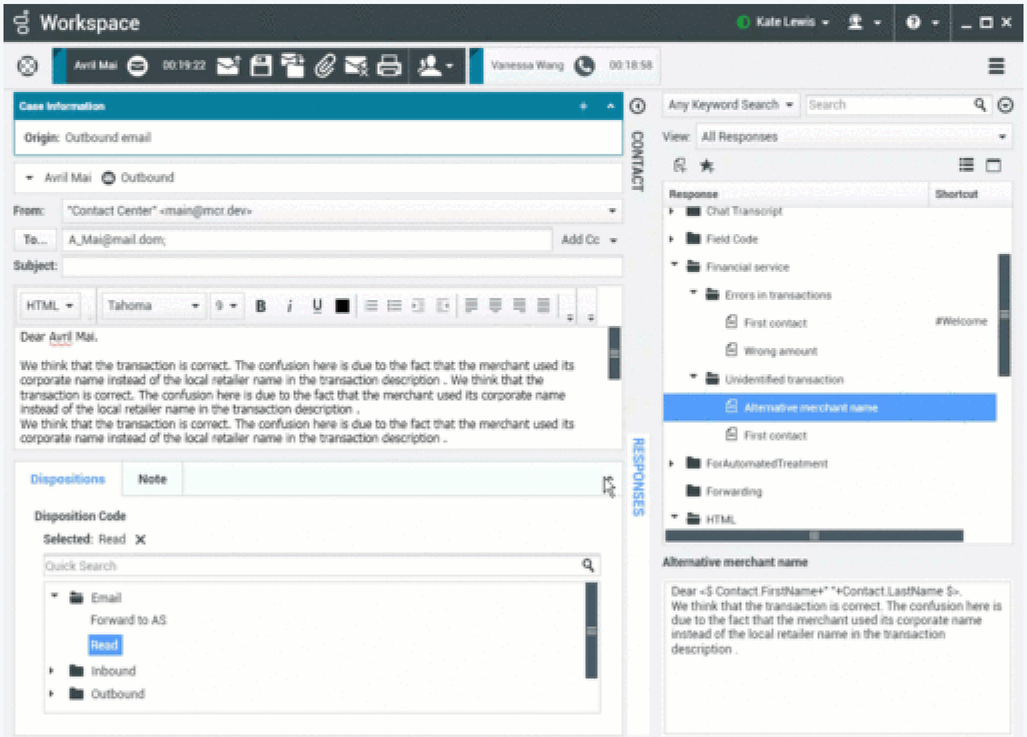
  - Transfer An SMS Interaction
- **Social Media Interactions**
  - Handle A Twitter Interaction
  - Handle A Facebook Interaction
  - Handle An RSS Interaction
- **Workitems**
  - Handle A Workitem Interaction
- **Advanced Media Blending**
  - Blend Different Media Into A Single Conversation
- **Common Interaction Management**
  - Edit Case Information And Record Information
  - Using The Standard Response Library
  - Apply Disposition Codes
  - Using The Interaction Bar

This video shows you how to manage the display of the interaction, the contact information and history, and the standard responses in the Interaction Window.

Link to video

Tip

Minimizing and Restoring the Disposition Code and Note views. If you need more space in the Interaction view you can minimize or restore the Disposition tab and Note tab area by clicking the chevron. [**Added:** 8.5.146.06]



Click the image if animation does not start.

Related Information

- Voice Tasks Overview help
- Callback interaction help
- Chat Tasks Overview help
- Email Tasks Overview help
- SMS and MMS Interactions help
- Workitems help
- Using Workspace Plugin for Skype for Business help
- Facebook Interaction help
- Twitter Interaction help
- RSS Interaction help

- Internal IM help
- Outbound Campaigns Overview help
- Workspace Components, Features, and Controls help

Using the Interaction Bar

[**Modified:** 8.5.116.10]

In this lesson, you will learn how to use the Interaction Bar in the Main Window to manage one or more interactions.

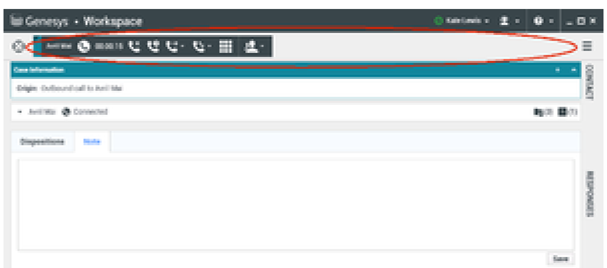
This lesson contains the following section:

- Managing Interactions

Managing Interactions

The Interaction Bar enables you to use a simplified control set to handle one or more interactions without having to make the interaction window active. It also enables you to restore, or bring to the front, any active interaction window.

The Interaction Bar is displayed at the bottom of the Main Window whenever you have one or more active interactions. Each interaction is represented by a control bar. If you are engaged with a contact in more than one simultaneous interaction, such as simultaneous Chat and Voice interactions, both interactions are represented by the same control bar. You can use the control bar to perform basic actions that are specific to the interaction type, such as ending a call.



Main Window displaying the Interaction Bar for a voice interaction

Working on Multiple Interactions at the Same Time

[**Added:** 8.5.116.10]

You might be allowed to work on more than one interaction at the same time. Your administrator might set up your system so that new interactions interrupt the current interaction that you are working on, or your administrator might set up Workspace so that when you accept a new interaction while you are working on another interaction, the new interaction opens in the background and your current interaction keeps the focus.

This behavior might be set up differently for each of your media channels. For example, a newly accepted email interaction might appear in the background and newly accepted voice interactions might receive the focus.

> ## Tip
>
> - Newly created outbound/outgoing interactions always receive the focus.
> - When interactions are accepted, but are displayed in the background, your reporting/focus time calculations might not begin until you select the interaction window and give it the focus.

Lesson: Managing multiple interactions by using the Interaction Bar

Purpose:

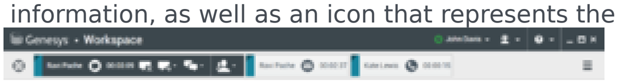
- To manage interaction windows and interaction functionality from the Main Window.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You are handling one or more interactions.
- You are using the Main Window view.

Start

1. Active interactions are displayed in the Interaction Bar at the bottom of the Main Window (see the Main Window displaying the Interaction Bar at the bottom figure). Interactions are "docked" in the Interaction Bar. The interactions appear as boxes that are identified by a name, number, or other contact information, as well as an icon that represents the interaction type (for example: voice, chat, or email).



Main Window displaying the Interaction Bar at the bottom

Click the control bar for an interaction to give it the focus. All other open interactions are collapsed to the Interaction Bar. If you place your mouse pointer over an interaction in the Interaction Bar, two things occur:

   - A tooltip is displayed that summarizes the content or the attached data for the interaction. The tooltip also includes a summary of all the interactions that are involved in this thread, as well as any consultation interactions that are related to the interaction.
   - The media icon in the interaction is a button that activates when you place your mouse pointer near it. If you click the media icon, Workspace switches to that interaction without opening the interaction view.

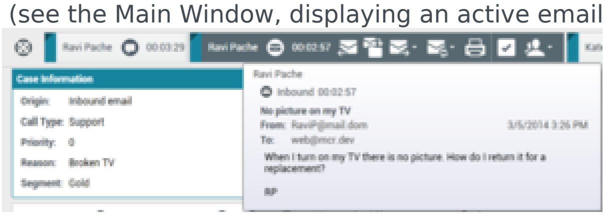
Use the switch media button to switch media without opening the interaction view.

Entries in the Interaction Bar flash (or blink) when specific events occur that might require your immediate attention. Chat, SMS Session, and IM interactions flash when a new message is received.

Tip

Your system might be configured so that all interaction control bars are automatically collapsed in the Interaction Bar. This might be done to enable you to see a third party application or other content in the Main Window before or during the handling of an interaction. To display an interaction view for a collapsed interaction, click the control bar. **Added:** 8.5.106.19

2. If you click another interaction box, it becomes active and changes color, and controls are displayed (see the Main Window, displaying an active email interaction in the Interaction Bar figure).



Main Window, displaying an active email interaction in the Interaction Bar

3. To control the interaction from the Interaction Bar, click the interaction box, and then use the controls. Different controls are available for different interaction types (see the Interaction Bar interaction boxes by type table). Refer to the interaction-specific chapters of the *Workspace User's Guide* and the *Workspace 8.5 Help* for information about the functionality of each control.

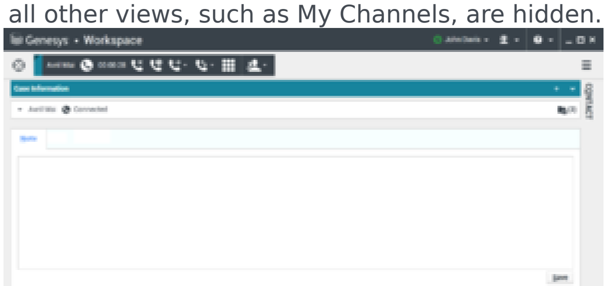
4. Each interaction can be displayed in any of the following three modes:
    1. Collapsed to the Interaction Bar
    2. Pinned
    3. Floating

Important

Your administrator has the option to specify which modes are available for each channel. For example, if you are an email-only agent, you might be enabled to use only the pinned mode; if you are a voice-only agent, you might be enabled to use only the floating mode.

Click the small colored bar on the left of the interaction control to toggle between pinned mode and floating mode. Each interaction can be set to pinned or floating mode independently.

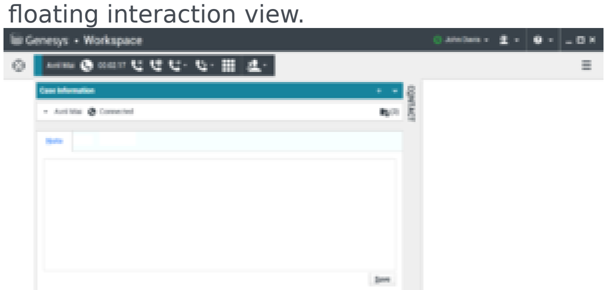
- **Pinned mode** — the interaction view is displayed in the Main View below the Interaction Bar, and all other views, such as My Channels, are hidden. Contact view and Response view are accessible.



Main Window Interaction Bar with a pinned interaction

Link to video

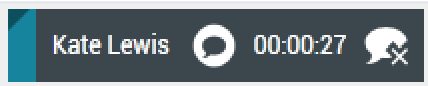
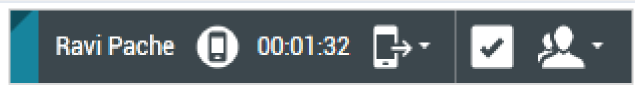
- **Floating mode** — the interaction view is displayed as a small view that is attached to the bottom of the Interaction Bar. If other interactions are currently open in pinned mode or if one the workspace views, such as My Channels is currently displayed, they will appear dimmed behind the floating interaction view.



Main Window Interaction Bar with a floating interaction

Link to video

Interaction Bar interaction boxes by type

Interaction Type	Interface
Chat	
E-Mail	
Instant Message	
SMS	
Voice	

End

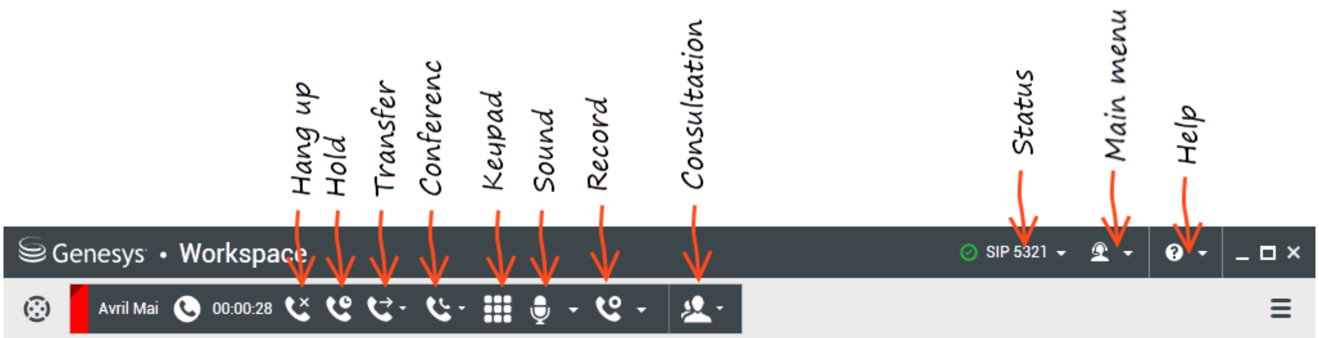
Related Information

- Interaction Bar help

Handle A Voice Call

In this lesson, you will learn how to accept an inbound voice interaction by using Workspace. Also, you will learn how to use the Team Communicator feature to call a contact or an internal target.

The Team Communicator enables you to find a contact or an internal target, send an Instant Message (IM) to an internal target, call a contact or an internal target, email a contact, initiate a conference call, or transfer a call.



Tip

Workspace might be configured by your administrator to store and display recent calls, including missed calls, in the Team Communicator view. When this feature is specified, recent voice interactions are displayed in the Team Communicator with a specific visual indicator (in/out/missed), and the tooltip for each record displays additional information about the corresponding call event (for example: call type, call timestamp, and missed status, if applicable) and calls that were directed to you that you did not answer are displayed in the Team Communicator when you click **Show and Search Recent**.

This chapter contains the following sections:

- Receiving a Voice Interaction
- Making a Voice Call
- Handling a Voice Call with Video

Tip

Refer to Handle Outbound-Campaign Voice Interactions, to use the Voice interaction view to handle Outbound Campaign calls.

Receiving a Voice Interaction

If you are the selected internal target for an inbound interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it (answer it), the interaction window is displayed. The interaction window contains information about the call and the controls that you need to complete the interaction.

Lesson: Handling an inbound voice interaction

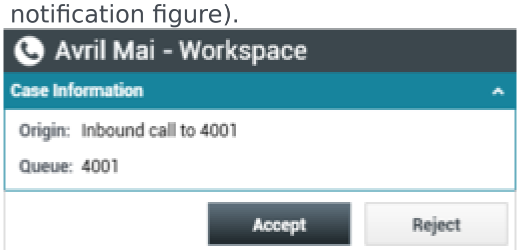
Purpose: To handle an inbound voice interaction properly.

Prerequisites

- You are logged in to Workspace (see Getting Started).
- Your status is Ready for the voice-media channel (see Lesson: Going Ready in the Workspace Main window).
- You are the internal target for the inbound interaction.

Start

1. Your hard phone or soft phone rings, and a preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Voice Interaction Preview interactive notification figure).



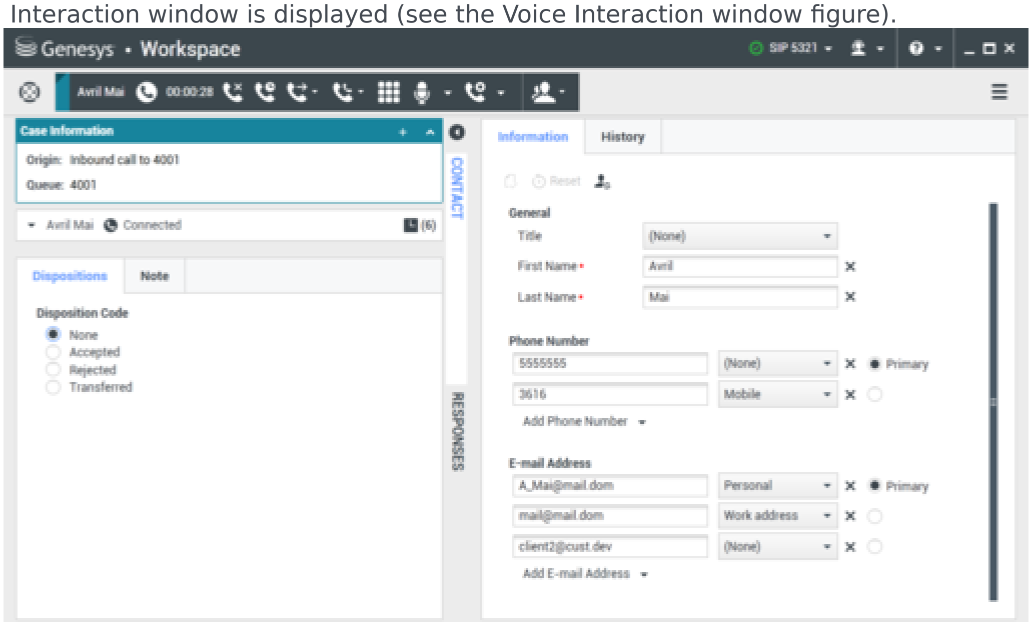
Voice Interaction Preview interactive notification

The Interaction Preview contains a summary of call information, including contact information and call metrics. The Interaction Preview might also contain Case Information, which is part of the case data regarding the call.

> **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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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)

If your account is configured for auto-answer, the Interaction Preview is not displayed and the call is answered automatically unless your account is configured to enable you to preview the case information before the interaction is auto-answered. In this case, when you receive an auto-answer interaction, the Interaction Preview is displayed on your desktop. A timer that counts down the number of seconds until you are connected to the contact is displayed in the **Accept** button (refer to the following figure). You can click **Accept** before the timer runs out or wait for the timer to run out. The **Reject** button might also be displayed if your administrator wants you to have the option of rejecting an interaction before it is auto-answered.[**Added:** 8.5.105.12]

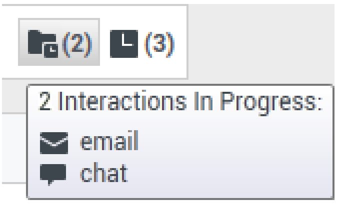
2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to answer the interaction.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will time-out and be redirected.
3. If you accept the interaction, the call is answered in your hard phone or soft phone, and the Voice Interaction window is displayed (see the Voice Interaction window figure).



Voice Interaction window

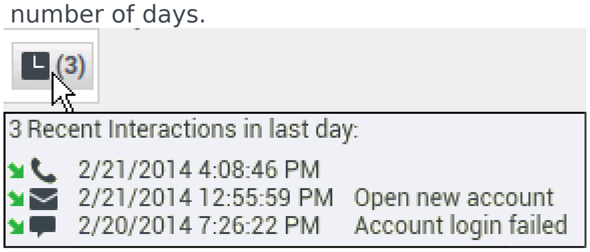
4. You can use the Voice Interaction window to do the following:
   - View contact records. See Lesson: Finding and viewing an interaction in the contact database.
   - View contact history. See Managing Contact History.
   - Your account might be configured to let you assign an interaction with an unknown contact to a known contact in the contact database by using the Manual Contact Assignment feature.
   - Launch the Team Communicator. See Starting a Voice Conference, Transferring a Voice Call, and Blending a voice consultation with an IM consultation.
   - Set a disposition code. See Assigning Disposition Codes.
   - Use the Note to add information about the interaction to the interaction history. See Managing Contact History.
   - View and edit the case information for the interaction. See Managing Contact History.
   - Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.

5. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see the Dynamic Contact History Matrix displaying the number and type of interactions in progress for the current contact figure). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.



Dynamic Contact History Matrix displaying the number and type of interactions in progress for the current contact

6. You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Recent interactions matrix displaying the list of interactions with the current contact within the last day figure). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



Recent interactions matrix displaying the list of interactions with the current contact within the last day

Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.

7. If you connect with the contact successfully, you can do any of the following:
   - Terminate the call (see Step 6).
   - Put the call on hold and retrieve the call. The call status changes to `On Hold`, and then back to `Connected` when you retrieve the call.
   - Use the keypad to send DTMF to the contact.
   - Start a voice or IM consultation.
   - Conference the call (see Starting a Voice Conference).
   - Transfer the call (see Transferring a Voice Call).
   - View and read standard responses (see Lesson: Using The Standard Response Library).
   - For SIP enabled agents, additional call actions are available:
   - Record the call (see Lesson: Record Interactions).
   - Mute and unmute the call.
   - Adjust the microphone and speaker volumes.

Tip

- For information about how to use the functionality in the interaction window, see the *Workspace 8.5 Help*.
- For a demonstration of the various call timers, including Total Duration, Hold Duration, and Post Call (After Call Work) Duration that might be available for you to use, see the Call Timers section in the *Workspace 8.5 Help*. [**Added:** 8.5.111.21]

8. When the interaction is complete, either you or the contact can end the call. If you want to terminate the call, click the `End Call` button.
9. If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the `disposition code` drop-down list or radio button list in the Disposition Code view (see Assigning Disposition Codes).
10. Click `Mark Done`.
11. If the Voice Interaction window does not close automatically, close the Voice Interaction window after you have clicked `Mark Done` for each of the active interactions.
12. Complete your after-call work.

End

Next Steps

- Set your status to Ready. See Lesson: Going Ready in the Workspace Main window.

Lesson: Dealing with a stuck interaction

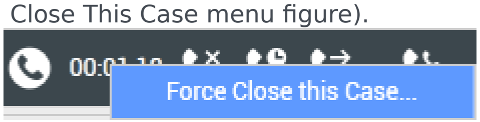
Purpose: To close the Interaction window if the interaction has become stuck in the system.

Prerequisites

- You are logged in to Workspace (see Getting Started).
- You are unable to close the Interaction window because the interaction has become stuck in the system.

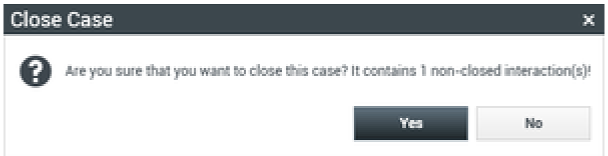
Start

1. If you are unable to close the Interaction window because the interaction has become stuck in the system, right-click the tab in the Interaction window that represents the interaction (see the Force Close This Case menu figure).

   Force Close This Case menu

   Select `Force Close This Case` from the pop-up menu.
2. In the `Close Case` dialog box, confirm that you want to force-close the interaction (see the Close Case dialog box figure):



Close Case dialog box

- Click Yes to force-close the case. The Interaction window closes. The status of the interaction remains as `In Progress` in the history until you mark it as Done.
- Click No to cancel the action and return to the Interaction window.

3. Complete your after-call work.

End

Making a Voice Call

Workspace enables you to call either an internal target or a contact after you find the target/contact in your company directory by using the Team Communicator feature of the Workspace Main Window.

> **Tip**
> Refer to Handle Outbound-Campaign Voice Interactions to use the Voice interaction view to handle Outbound Campaign calls.

This section contains the following lessons:

- Lesson: Calling an internal target
- Lesson: Calling a contact
- Lesson: Directly dialing a contact

Lesson: Calling an internal target

Purpose: To make a voice interaction with an internal target. The Voice Interaction window enables you to view all the information that is necessary to handle a voice interaction with an internal agent. The window contains tabs that enable you to handle more than one interaction simultaneously.

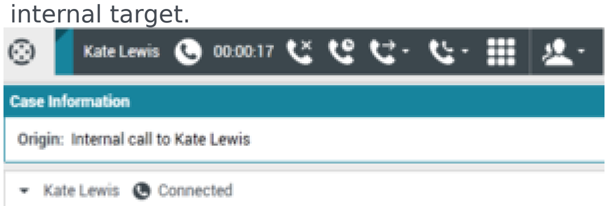
The information that is displayed to you in this view depends on your assigned role and the case information that is available about the internal target.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have found the internal target and have selected an Internal Voice Interaction (see Lesson: Using the Team Communicator feature to find an internal target).

Start

1. When you choose to call an internal target (see Lesson: Using the Team Communicator feature to find an internal target), the Voice Interaction window opens. The status is `Establishing`. Wait for the internal target to accept your invitation.
2. If the internal target accepts your invitation, the status in the Interaction window changes to `Connected` (see the Voice Interaction window displaying status as Connected figure). You are now connected to the internal target.



Voice Interaction window displaying status as Connected

If the internal target rejects or fails to accept your invitation, then the call status changes to Ended. To try to call the internal target again or to call a different internal target, repeat Step 1.

> **Tip**
>
> You can click the `Team Communicator My Recents` button to try to call the internal target again. For more information, see the *Workspace 8.5 Help*.

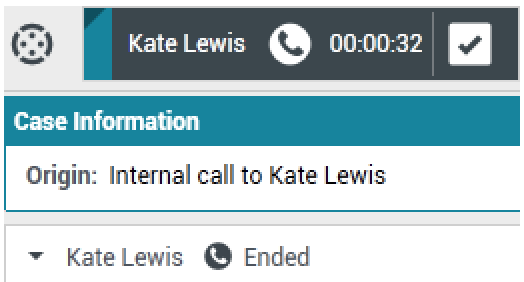
3. If you successfully connect with the internal target you can do one of the following:
   - Terminate the call (see Step 4).
   - Put the call on hold, and then resume the call. The call status changes to `On Hold` when you put the call on hold, and then back to `Connected` when you resume the call.
   - Use the keypad to send DTMF to the internal target.
   - Start a voice or IM consultation.
   - Conference the call (see Starting a Voice Conference).
   - Transfer the call (see Transferring a Voice Call).
   - For SIP-enabled agents, additional call actions are available:
   - Record the call (see Record Interactions).
   - Mute and unmute the call
   - Adjust the microphone and speaker volumes

> **Tip**
>
> - For information about how to use the functionality in the interaction window, see the *Workspace 8.5 Help*.
> - For a demonstration of the various call timers, including Total Duration, Hold

> Duration, and Post Call (After Call Work) Duration that might be available for you to use, see the Call Timers section in the *Workspace 8.5 Help*. [**Added:** 8.5.111.21]

4. When you have finished speaking with the internal target you can terminate the call or wait for the internal target to terminate the call.

 If you want to terminate the call, click the `End Call` button. The call status changes to Ended, and the call is released (see the Voice Interaction window displaying status as Ended figure).

 Voice Interaction window displaying status as Ended

5. After a call is released, one or more of the following actions might be available to you, depending on your assigned role or the configuration of your system:
 - Click `Mark Done` to close the Interaction window.
 - Select a disposition (call outcome).

> ## Tip
> Your system might be configured so that you cannot click `Mark Done` until you have selected a disposition code. See Assigning Disposition Codes for more information about Disposition Codes.

 After a call has been released and you have completed any required post-call tasks, the Voice Interaction window closes.

End

Lesson: Calling a contact

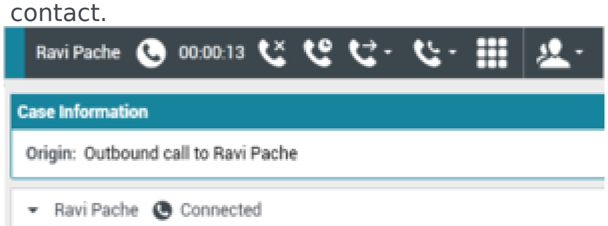
Purpose: To make a voice interaction with a contact. When you choose to call a contact, the Voice Interaction window is displayed. It enables you to view all the information that is necessary to handle a voice interaction with a contact.

The information that is contained in this view depends on your assigned role and the case information that is available about the contact.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have found the contact and have selected an External Voice Interaction (see Lesson: Using the Team Communicator feature to find a contact).

Start

1. When you choose to call a contact (see Lesson: Using the Team Communicator feature to find a contact), the Voice Interaction window is displayed. The Status is `Establishing`. Wait for the contact to accept your invitation.
2. If the contact accepts your invitation, the status in the Voice Interaction window changes to `Connected` (see the Voice Interaction window displaying status as Connected figure). You can now talk to the contact.


Voice Interaction window displaying status as Connected
If the contact rejects or fails to accept your invitation, the call status changes to Ended (see Step 1).
3. If you connect with the contact successfully, you can do one of the following:
   - Terminate the call (see Step 4).
   - Put the call on hold and retrieve the call. The call status changes to `On Hold`, and then back to `Connected` when you retrieve the call.
   - Use the keypad to send DTMF to the contact.
   - Start a voice or IM consultation.
   - Conference the call (see Starting a Voice Conference).
   - Transfer the call (see Transferring a Voice Call).
   - For SIP-enabled agents, additional call actions are available:
   - Record the call (see Record Interactions).
   - Mute and unmute the call.
   - Adjust the microphone and speaker volumes.

Tip

- For information about how to use the functionality in the interaction window, see the *Workspace 8.5 Help*.
- For a demonstration of the various call timers, including Total Duration, Hold Duration, and Post Call (After Call Work) Duration that might be available for you to use, see the Call Timers section in the *Workspace 8.5 Help*. [**Added:** 8.5.111.21]

4. When you have finished talking to the contact you can terminate the call or wait for the contact to terminate the call. If you want to terminate the call, click the `End Call` button. The call status changes to Ended, and the call is released.
5. After a call is released, one or more of the following actions might be available to you, depending on your assigned role:
   - Click `Mark Done` to close the Interaction window.
   - Select a disposition (call outcome).

   > **Tip**
   >
   > Your system might be configured so that you cannot click `Mark Done` until you have selected a disposition code. See Assigning Disposition Codes for more information about Disposition Codes.

   After a call has been released and you have completed any required post-call tasks, the Voice Interaction window closes.

End

Lesson: Directly dialing a contact

Purpose: To make a voice interaction with a contact by directly dialing a phone number.

When you choose to call a contact, the Voice Interaction window is displayed. It enables you to view all the information that is necessary to handle a voice interaction with a contact.

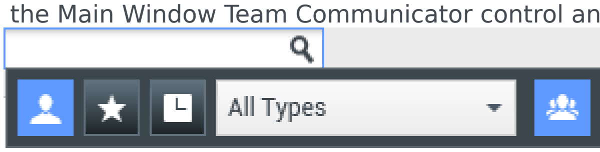
The information that is contained in this view depends on your assigned role and the case information that is available about the contact.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have the number of the party that you want to call.
- You have found the contact and have selected an External Voice Interaction (see Lesson: Using the Team Communicator feature to find a contact).

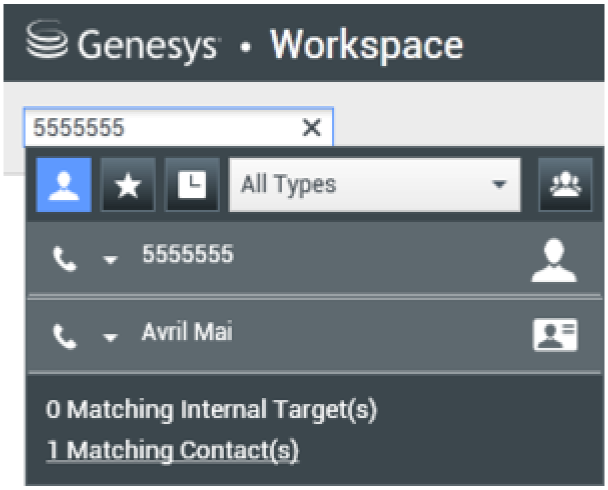
Start

1. In the Main Window or an interaction window, click in the Team Communicator `Quick Search` field (see the Main Window Team Communicator control and Quick Search field figure).



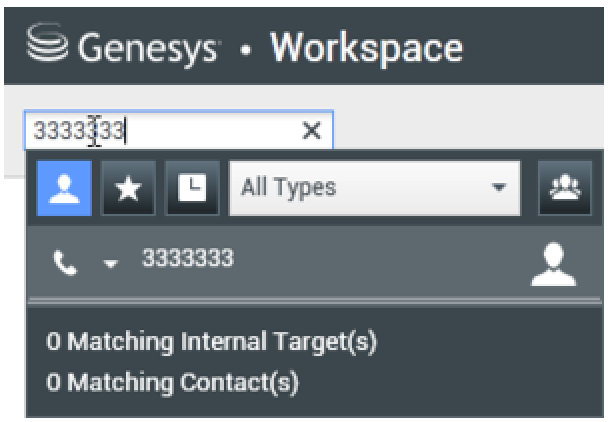
Main Window Team Communicator control and Quick Search field

2. Enter the telephone number that you want to directly dial (see the Team Communicator displaying a directly dialed number figure).



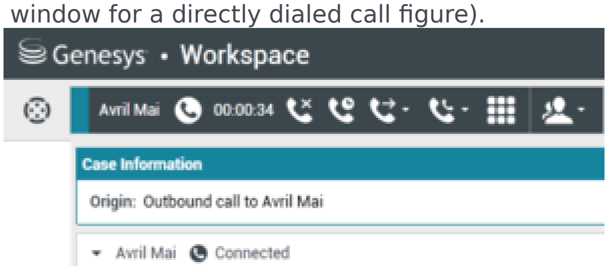
Team Communicator displaying a directly dialed number

As you enter text, Workspace searches the internal and contact database and lists potential matches (see the Team Communicator displaying an unknown directly dialed number figure).



Team Communicator displaying an unknown directly dialed number

3. To dial the number, click the phone icon that is next to the number that you entered in the `Action` menu. If the party is reached, the Voice Interaction window is displayed (see the Voice Interaction window for a directly dialed call figure).



Voice Interaction window for a directly dialed call

4. Handle and complete your call (see Lesson: Calling a contact).

End

Handling a Voice Call with Video

Calls that originate from smart phones, tablets, and computers might also contain a video stream sent from the webcam of the device. If you are the selected internal target for an inbound voice with video interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it (answer it), the interaction window is displayed. The interaction window contains information about the call and the controls that you need to complete the interaction.

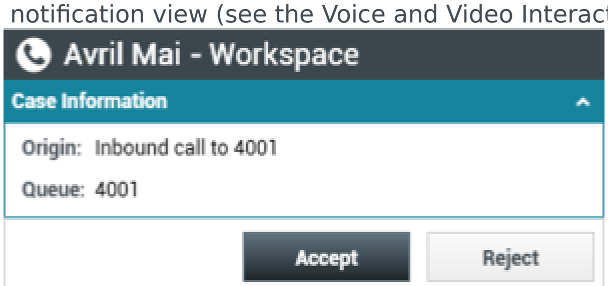
Lesson: Handling an inbound voice interaction with video

Purpose: To handle an inbound voice with video interaction properly.

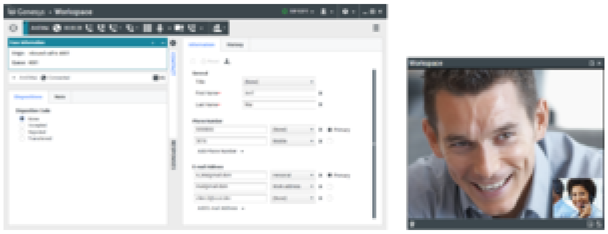
Prerequisites

- You are logged in to Workspace (see Getting Started).
- Your status is Ready for the voice-media channel (see Lesson: Going Ready in the Workspace Main window).
- You are enabled to receive voice and video interactions.
- You are the internal target for the inbound interaction.

Start

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Voice and Video Interaction Preview interactive notification figure).


Voice and Video Interaction Preview interactive notification
The Interaction Preview contains a summary of call information, including contact information and call metrics. The Interaction Preview might also contain Case Information, which is part of the case data regarding the call.
2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to answer the interaction.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will time-out and be redirected.
3. If you accept the interaction, the Voice Interaction view is displayed in the interaction bar (see the Voice and Video Interaction view figure).



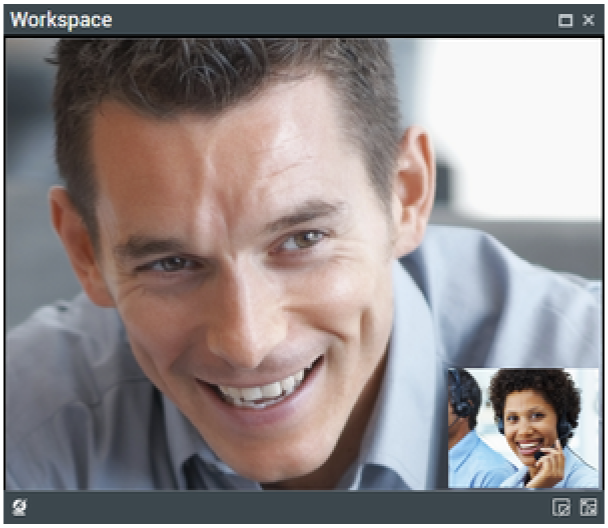
Voice and Video Interaction view

Refer to Receiving a Voice Interaction for more information about handling a voice interaction and using the voice controls.

4. If the video stream that is associated with the call is not configured to open automatically, click **Start Video**: .
The video view is displayed in a separate window. Use the following controls during a voice and video call:

   - / — Click to start or stop your video stream component of a video-enabled voice call. Use this feature to prevent the contact from seeing the video stream from your webcam; you will continue to see the video stream from the contact. This has no effect on the voice call. The video stream sends a message to your contact that says "On Hold". If you put the voice call on hold, the video call is also put on hold.
   - — Put the call on hold and retrieve the call. The call status changes to `On Hold`, and then back to `Connected` when you retrieve the call. When you put the call on hold, the video stream is also put on hold. You and the contact can no longer see each other's video streams. A "Video on Hold" video message is displayed to the contact.
   - / — Click to show or hide in the Video Interaction window the thumbnail view of your video stream.
   - — Click to toggle the view of the Video Interaction window between the inbound video stream and the video stream from your webcam.

You can resize or maximize the Video Interaction window by clicking and dragging the edges of the window. Workspace remembers the size and position of the last Video Interaction window that you used.



Workspace Video window

Click **Stop Video**:  to close the Video Interaction window. This does not end the call, it only stops the video stream from being displayed and stops sending your video stream to the contact.

5. When the interaction is complete, either you or the contact can end the call. If you want to terminate the call, click the `End Call` button. When you end the voice call, the video stream will also end and the Video Interaction window is closed.
6. If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the `disposition` code drop-down list or radio button list in the Disposition Code view (see Assigning Disposition Codes).
7. Click `Mark Done`.
8. If the Voice Interaction window does not close automatically, close the Voice Interaction window after you have clicked `Mark Done` for each of the active interactions.
9. Complete your after-call work.

End

Related Information

- Voice Call help
- Video Call help
- Troubleshooting and Frequently Asked Questions

Handle A Voice Consultation

In this lesson, you will learn how to use the Team Communicator feature to find an internal target (such as an agent, Routing Point, or queue) or a contact and start a voice consultation from an interaction window, such as voice, email, and chat. You can also use the first procedure in this lesson to find a contact and start a voice consultation. The second section demonstrates how to handle a Voice Consultation request.

> **Tip**
> For a simplified guide to handling consultations, refer to the *Workspace Agent Help*

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 consultation, or transfer a call.

> **Tip**
> Workspace might be configured by your administrator to store and display recent calls, including missed calls, in the Team Communicator view. When this feature is specified, recent voice interactions are displayed in the Team Communicator with a specific visual indicator (in/out/missed), and the tooltip for each record displays additional information about the corresponding call event (for example: call type, call timestamp, and missed status, if applicable), and voice consultations that were directed to you that you did not answer are displayed in the Team Communicator when you click **Show and Search Recent**.

This lesson contains the following sections:

- Starting a Voice Consultation
- Receiving a Voice Consultation

Starting a Voice Consultation

The Workspace Voice, Email, and Chat Interaction windows enable you to start a voice, chat, or instant messaging consultation with an internal target or a contact about your current interaction (see Lesson: Handle A Voice Call), email interaction (see Lesson: Handle An Email Interaction), or chat interaction (see Lesson: Handle a Chat Interaction).

Workspace also enables you to instantly transfer or conference your call with an internal target or a contact. You can do this with or without first starting a consultation. For instant transfers, the call is transferred as soon as the other party accepts the interaction. For instant conferences, the conference starts as soon as the other party accepts the interaction.

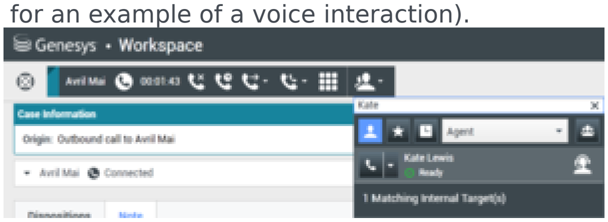
Lesson: Starting a voice consultation

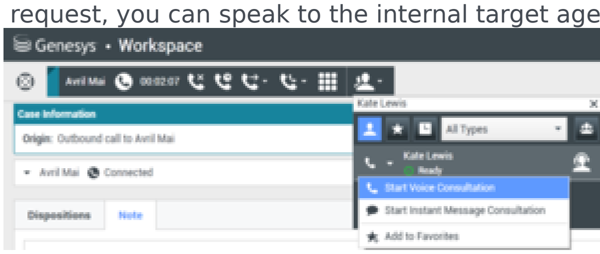
Purpose: To find an internal target (such as an agent, Routing Point, or queue), and then start a voice consultation.

Prerequisites

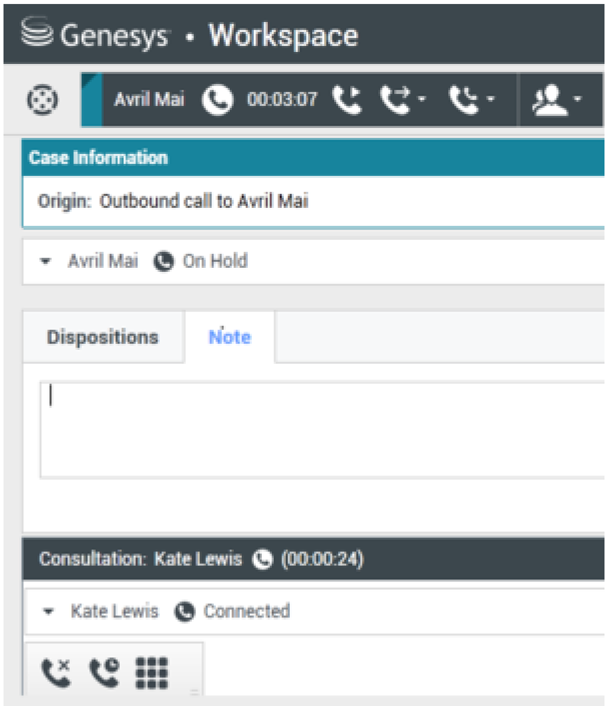
- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have an active interaction with a contact (see Receiving a Voice Interaction, Receiving and Handling an Inbound Email Interaction, or Receiving and Handling an Inbound Chat Interaction).

Start

1. In the active interaction window, click the Start Consultation button to open the Team Communicator (see the Finding an internal target for a voice consultation in the active Voice Interaction window figure for an example of a voice interaction).


Finding an internal target for a voice consultation in the active Voice Interaction window
2. Use the Team Communicator 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).
3. Click the `Action Menu` drop-down list is displayed next to the name of the internal target with whom you want to consult, and then select `Start Voice Consultation` (see the Start Voice Consultation menu option figure). The contact is put on hold. When the internal target accepts the interaction request, you can speak to the internal target agent.


Start Voice Consultation menu option
If the consultation target does not accept your request, the consultation request is released, but your contact might still be on hold. You must click the `Resume Call` button to take your contact off hold.
4. When you are connected to your consultation target, the internal target is added to the Workspace Interaction window (see the Voice Interaction window, displaying a consultation call that is connected to the internal target while the contact party is on hold figure).



Voice Interaction window, displaying a consultation call that is connected to the internal target while the contact party is on hold

5. During your consultation, you can alternate between the contact and the consulting party by clicking the `Resume Call` button. Doing this puts the active party on hold and connects you to the other party. During your consultation, you can start a conference with your consultation target or another target (see Starting a Voice Conference).
6. To end your consultation, click `End Call`. Your consultation target might also end the call.

> **Tip**
>
> Depending on how your system is configured, when you end the call with the consultation target you might automatically be reconnected with the contact who was on hold or you might have to manually reconnect the call by clicking `Resume` (). The manual reconnect feature enables you to make another consultation call without being reconnected and having to put the contact on hold again.

[**Added:** 8.5.103.10]

End

Receiving a Voice Consultation

The Workspace Voice, Email, and Chat Interaction windows enable you to receive a voice, chat, or instant messaging consultation with an internal target.

Workspace also enables agents to instantly transfer or conference calls to you. Agents can do this with or without first starting a consultation. For instant transfers, the call is transferred as soon as you accept the interaction. For instant conferences, the conference starts as soon as you accept the interaction.

Lesson: Receiving a voice consultation request

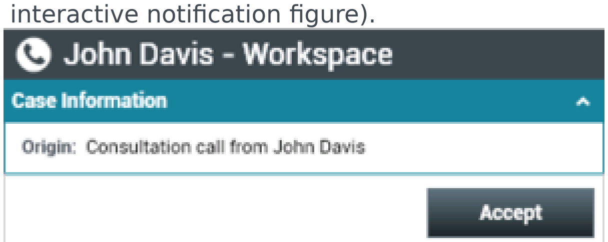
Purpose: Receive an invitation to a consult about a voice interaction from another agent to provide assistance to that agent in completing an active interaction.

Prerequisites

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

Start

1. Your hard phone or soft phone rings, and a preview of the inbound interaction is displayed on your workstation desktop in an interactive notification window (see the Voice Interaction Consult Preview interactive notification figure).

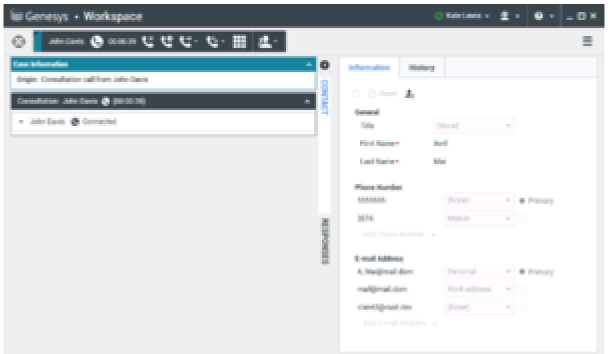


Voice Interaction Consult Preview interactive notification

The Interaction Preview contains a summary of information about the call with the contact and the identity of the agent that is requesting consultation. The Interaction Preview might also contain Case Information, which is part of the case data regarding the call.

> **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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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)

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to answer the consultation interaction.
   - Do nothing. The interaction will time-out.
3. If you accept the interaction, the call is answered in your hard phone or soft phone, and the Voice Consultation Interaction window is displayed (see the Voice Consultation Interaction window figure).



Voice Consultation Interaction window

You can use the Voice Consultation Interaction window to do the following:

- View contact records. See Lesson: Finding and viewing an interaction in the contact database.
- View contact history. See Managing Contact History.
- Launch the Team Communicator. See Starting a Voice Conference, Transferring a Voice Call, and Blending a voice consultation with an IM consultation.
- View the case data for the interaction. See Managing Contact History.
- Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.

4. If you connect successfully with the agent that is requesting a consultation, you can do any of the following:
    - Terminate the call (see Step 5).
    - Put the call on hold and retrieve the call. The call status changes to `On Hold`, and then back to `Connected` when you retrieve the call.
    - Use the keypad to send DTMF to the contact.
    - Start a voice or IM consultation.
    - Conference the call (see Starting a Voice Conference).
    - Transfer the call (see Transferring a Voice Call).
    - View and read standard responses (see Lesson: Using The Standard Response Library).
    - For SIP enabled agents, additional call actions are available:
        - Record the call (see Record Interactions).
        - Mute and unmute the call.
        - Adjust the microphone and speaker volumes.
          Note: For information about how to use the functionality in the interaction window, see the *Workspace 8.5 Help*.
5. When the interaction is complete, either you or the agent can end the call.
   If you want to terminate the call, click the `End Call` button.
6. The Voice Interaction window closes automatically. You do not have to click `Mark Done` or set a

disposition for a consultation call that you have received.

End

Next Steps

- Set your status to Ready. See Lesson: Going Ready in the Workspace Main window.

Related Information

- Voice Consultation help

Transfer A Voice Call

In this lesson, you will learn how to use the Team Communicator feature to transfer a voice call to an internal target or to a contact. The Team Communicator enables you to find an internal target or a contact, send an Instant Message (IM) to an internal target, call a contact or an internal target, initiate a conference, or transfer a call. This lesson contains the following sections:

- Transferring a Voice Call
- Transferring an Interaction to an Active Consultation

Transferring a Voice Call

The Workspace Voice Interaction window enables you to transfer your current voice call to another party. In a consultation transfer, the current call is put on hold while you talk to the transfer target. In an instant transfer, the call is transferred as soon as the other party accepts the interaction. This section contains the following procedures:

- Lesson: Starting a voice transfer
- Lesson: Receiving a transferred call
- Lesson: Transfer to an active consultation

> **Tip**
> Workspace might be configured by your administrator to store and display recent calls, including missed calls, in the Team Communicator view. When this feature is specified, recent voice interactions are displayed in the Team Communicator with a specific visual indicator (in/out/missed), and the tooltip for each record displays additional information about the corresponding call event (for example: call type, call timestamp, and missed status, if applicable), and calls that were transferred to you that you did not answer are displayed in the Team Communicator when you click **Show and Search Recent**.

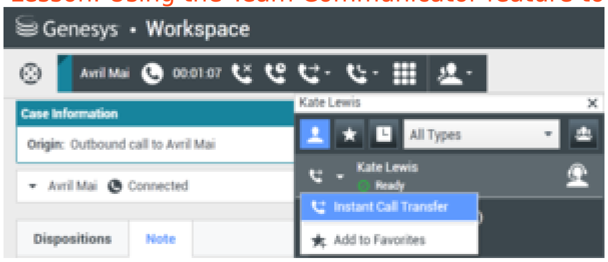
Lesson: Starting a voice transfer

Purpose: To transfer your current interaction to an internal target or a contact.

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. In the active voice interaction, click the `Instant Voice Transfer` button to open the Team Communicator (see the Finding an internal target for a voice transfer in the active Voice 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 for a voice transfer in the active Voice 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 select `Instant Voice Transfer`. The contact is put on hold. When the internal target accepts the interaction request, the interaction is instantly transferred to the transfer target. The interaction window on your desktop closes. If the transfer target does not accept your request, the transfer request is released, but your contact is still on hold. You must click the `Resume Call` button to take your contact off hold.
3. Complete your after-call work.
4. Set your status to Ready.

End

Lesson: Receiving a transferred call

Purpose: To receive an invitation to a accept a transferred call from another agent, to provide assistance to that agent in completing an active interaction.

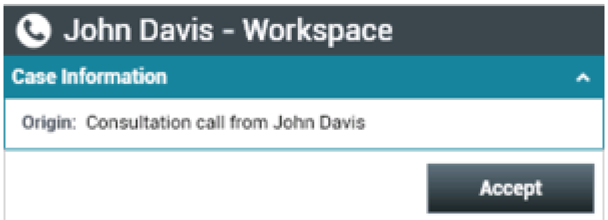
> **Tip**
> You might be invited to accept a one-step or two-step transfer.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).

Start

1. If another agent wants to transfer a voice interaction to you, they can choose between an instant transfer and a transfer from a consultation. 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).



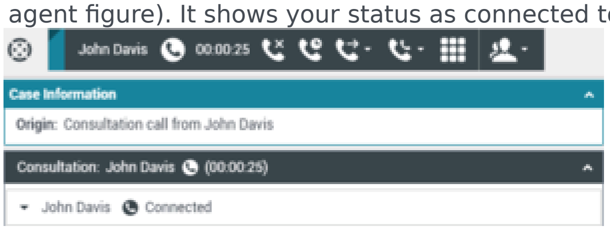
Interaction Preview interactive notification, informing you of a transfer request

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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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 or to consult first with the calling agent:

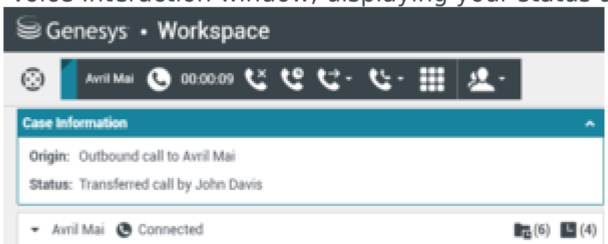
- If the calling agent initiated an instant transfer, the call is immediately transferred to you. Go to Step 3.
- If the calling agent initiated a consultation transfer, the Workspace Voice Interaction window is displayed (see the Voice Interaction window, displaying your status as connected to the calling agent figure). It shows your status as connected to the calling agent.



Voice Interaction window, displaying your status as connected to the calling agent

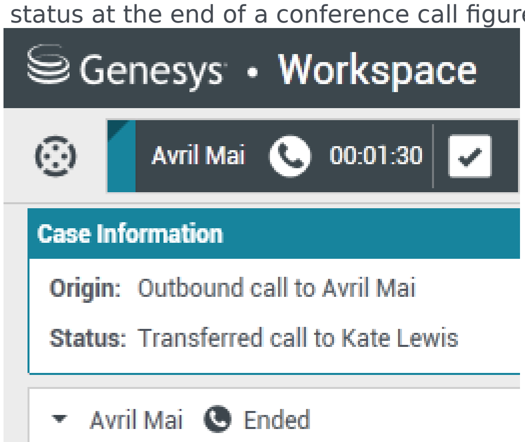
2. If the transferring agent used a consultation transfer, the Workspace Voice Interaction window enables you to perform the following functions while you are speaking to the calling agent, before you accept the transferred call:
    - Speak privately with the calling agent about the call, before the call is transferred to you.
    - End the call--This function ends your participation in the consultation call; the call is not transferred to you.
    - Put the call on hold and retrieve the call.
    - Send DTMF by using the keypad.
    - Conference the call.
    - Transfer the call.
    - For SIP enabled agents, additional call actions are available:
        - Record the call (see Lesson: Record Interactions).
        - Mute and unmute the call.

- Adjust the microphone and speaker volumes.
  For information about how to use the functionality in the interaction window, see the *Workspace 8.5 Help*.

3. If the calling agent completes the transfer to you, the Workspace Voice Interaction window is updated to display the status of the party to whom you are talking. The status changes to `Connected` (see the Voice Interaction window, displaying your status as connected to the transferred contact figure).
   

   Voice Interaction window, displaying your status as connected to the transferred contact

   The Workspace Voice Interaction window enables you to use all the functionality of an inbound call (see Step 3 of Lesson: Handling an inbound voice interaction).

4. Click `End Call` to terminate your connection to the call. The Workspace Voice Interaction window is updated to display the status of the call as Ended (see the Voice Interaction window, displaying the status at the end of a conference call figure).
   

   Voice Interaction window, displaying the status at the end of a conference call

   If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the `Disposition Code` drop-down list or radio-button list in the Disposition Code view (see Assigning Disposition Codes).

5. Click `Mark Done`.
6. Close the Voice Interaction window.
7. Complete your after-call work.
8. Set your status to Ready.

End

Transferring an Interaction to an Active Consultation

You can transfer your current interaction to your consultation target. You can also transfer a voice interaction to other types of consultation, such as IM, by following the same steps that are presented in the following procedure, beginning at Step 2.

Lesson: Transfer to an active consultation

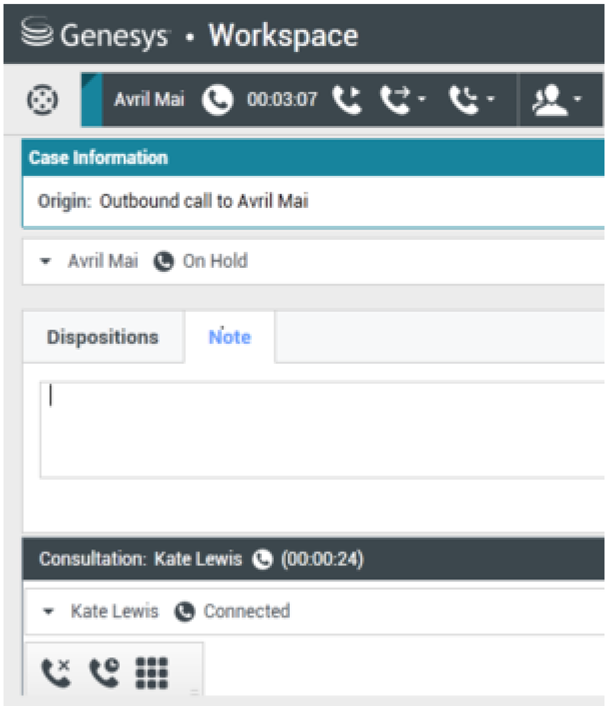
Purpose: To transfer the current interaction to a party with whom you are already consulting.

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).
- You have an active consultation with another party (see Lesson: Starting a voice consultation).

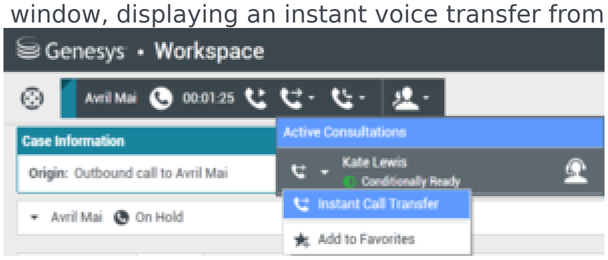
Start

1. During your active consultation (see the Voice Interaction window, displaying a consultation call that is connected to the internal target while the contact party is on hold figure), you can perform any of the following functions by using the Voice Consult toolbar.
   - Alternate (toggle) between the contact and the internal target by clicking the `Resume Call` button alternately on the toolbar for the respective call. The other party is put on hold until you toggle back or complete the conference.
   - End the call to the internal target and resume the call with the contact.
   - Send DTMF to the internal target.
   - For SIP-enabled agents, additional call actions are available:
     - Record the call (see Record Interactions).
     - Mute and unmute the call.
     - Adjust the microphone and speaker volumes.
       For information about how to use the functionality in the interaction window, see the *Workspace 8.5 Help*.



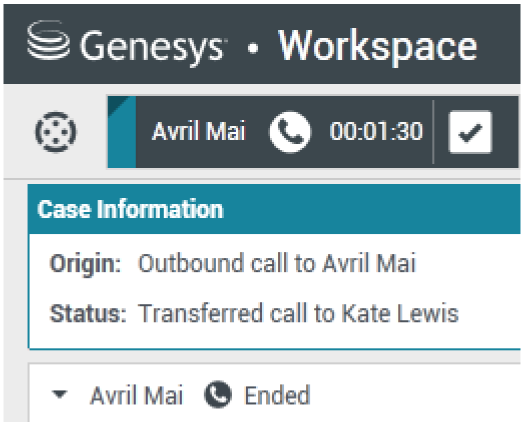
Voice Interaction window, displaying a consultation call that is connected to the internal target while the contact party is on hold

2. To transfer your active interaction to your consultation target, click the `Instant Transfer` button. The Team Communicator is displayed showing a list of your active consultations (see the Voice Interaction window, displaying an instant voice transfer from a consultation call figure).



Voice Interaction window, displaying an instant voice transfer from a consultation call

3. Complete the transfer by clicking the `Instant Voice Transfer` button that is beside the name of the target to whom you want to transfer the interaction. The contact is transferred to the consulting target. The call status changes to Ended (see the Voice Interaction window, displaying status as Ended figure).



Voice Interaction window, displaying status as Ended

4. After a call is released, one or more of the following actions might be available to you, depending on your assigned role:
   - Click `Mark Done` to close the Voice Interaction window.
   - Select a disposition (see Assigning Disposition Codes).
     Note: Your system might be configured so that you cannot click `Mark Done` until you have selected a disposition code.
5. Close the Voice Interaction window.
6. Complete your after-call work.
7. Set your status to Ready.

End

Related Information

- Voice Call help

Conference A Voice Call

[**Modified:** 8.5.109.16]

In this lesson, you will learn how to use the Team Communicator feature to find an internal target (such as an agent, Routing Point, or queue) or a contact and start a voice conference from an interaction window, such as voice, email, and chat. You can also use the first procedure in this lesson to find a contact and start a voice conference.

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 consultation, or transfer a call.

This lesson contains the following sections:

- Starting a Voice Conference
- Suspending and Reinstating a Party from a Conference
- Start a Conference with an Active Consultation

Link to video

Starting a Voice Conference

The Workspace Voice, Email, and Chat Interaction windows enable you to conference your current voice, chat, or instant messaging interaction with an internal target or a contact about your current interaction (see Handle A Voice Call), email interaction (see Handle An Email Interaction), or chat interaction (see Handle a Chat Interaction).

Workspace also enables you to instantly transfer or conference your call with an internal target or a contact. You can do this with or without first starting a consultation. For instant conferences, the conference starts as soon as the other party accepts the interaction.

This section contains the following lessons:

- Lesson: Starting a voice conference
- Lesson: Receiving a conference call
- Lesson: Temporarily suspending a party from a voice conference
- Lesson: Starting a conference with an active consultation

Tip

Workspace might be configured by your administrator to store and display recent calls, including missed calls, in the Team Communicator view. When this feature is specified, recent voice interactions are displayed in the Team Communicator with a specific visual indicator (in/out/missed), and the tooltip for each record displays additional information about the corresponding call event (for example: call type, call timestamp, and missed status, if applicable), and conference calls that were directed to you that you did not answer are displayed in the Team Communicator when you click **Show and Search Recent**.

Lesson: Starting a voice conference

Purpose: To find an internal target (such as an agent, Routing Point, or queue), and then start and complete a conference call with the internal target and the current contact.

Tip

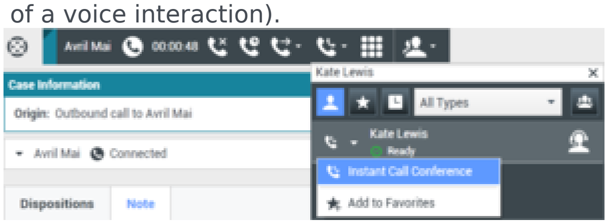
You can also call a contact to initiate a conference.

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, Receiving and Handling an Inbound Email Interaction, or Receiving and Handling an Inbound Chat Interaction).

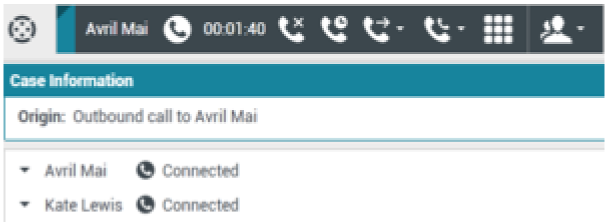
Start

1. In the active interaction window, click the `Instant Voice Conference` button to open the Team Communicator (see the Finding an internal target for a voice transfer in the active Voice Interaction window figure in Transfer A Voice Call lesson) to find the target to whom you want to conference with the current interaction (see the Initiating a conference from an active interaction figure for an example of a voice interaction).



Initiating a conference from an active interaction

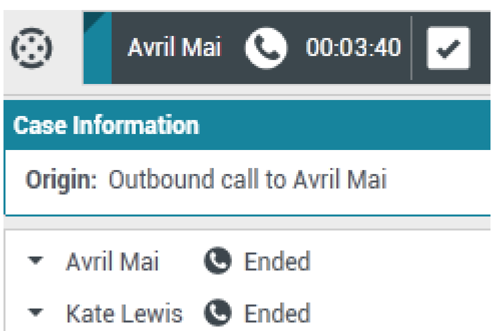
2. Complete the conference by clicking the `Instant Voice Conference` button beside the name of the target, or open the `Action` menu and select `Instant Voice Conference`. The conference begins as soon as the internal target accepts the interaction request. Depending on the configuration of your system, this option might not be available. You, the contact, and the internal target agent are placed into a three-way conference (see the Voice Interaction window, displaying a conference with a contact and a second agent figure).



Voice Interaction window, displaying a conference with a contact and a second agent

During the conference call you can perform the following actions: Use the Conference Party Action Menu (next to the Party Status) to do one of the following:

- **Delete from Conference**—Terminate the connection to the party. This action ends the call to the party, but continues the call with the other party.
- **Suspend From Conference**—Disable listening and talking for the selected party.
- **Reinstate To Conference**—Enable listening and talking for that party.
- End the Call—Both lines are disconnected (go to Step 4).
- Put both parties on hold.
- Instantly transfer the call to another target.
- Instantly conference the call with another target.
- Send DTMF to the internal target.
- For SIP-enabled agents, additional call actions are available:
- Record the call (see Record Interactions).
- Mute and unmute the call.
- Adjust the microphone and speaker volumes.
  For information about how to use the functionality in the interaction window, see the *Workspace 8.5 Help*.



Voice Interaction window displaying an ended conference with a contact and a second agent

3. The internal target agent can choose to release the call. If this happens, the internal target agent is disconnected, but you remain connected to the contact. You can complete your call with the contact, transfer the contact, or start a new conference call.
4. If you have completed your call and the internal target agent is still connected, when you click the End `Call` button, the call is transferred automatically to the internal target agent. Go to Step 5 of the Lesson: Calling a contact.
   If you have completed your call and the internal target agent has already disconnected from the

conference, go to Step 4 of the Lesson: Calling a contact.

5. During your consultation, you can transfer the call to your consultation target, or to another target. You can also start a conference with your consultation target or another target.

End

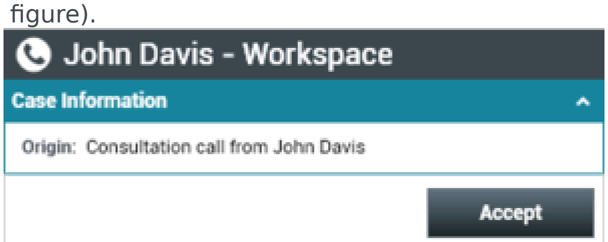
Lesson: Receiving a conference call

Purpose: Receive an invitation to a conference call from another agent to provide assistance to that agent in completing an active interaction. **Prerequisites**

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

Start

1. If another agent wants to conference with you and a contact about their current interaction the agent can initiate a voice conference. If the other agent is handling a voice interaction and initiates a voice conference request, you are notified of the request by the Workspace Interaction Preview interactive notification (see the Interaction Preview interactive notification, informing you of a conference request figure).



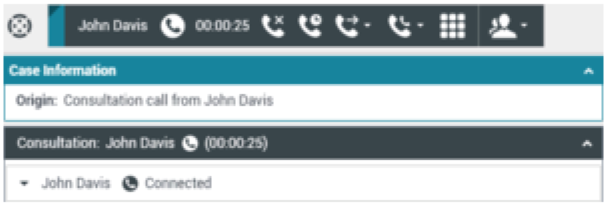
Interaction Preview interactive notification, informing you of a conference request

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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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)

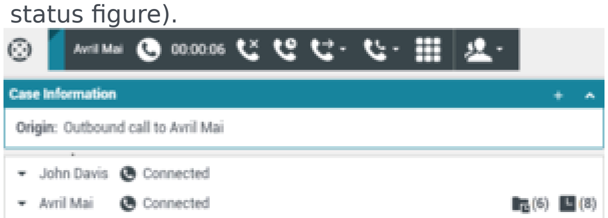
Click `Accept` to connect to the conference:

- If the calling agent initiated an instant conference, you are immediately in the conference with the contact. Go to Remaining Connected After the Conferencing Agent Disconnects.
- If the calling agent initiated a voice consultation conference, the Workspace Voice Interaction window is displayed and shows your status as connected to the calling agent (see the Voice Interaction window, displaying your status as Connected to the calling agent figure).



Voice Interaction window, displaying your status as Connected to the calling agent

2. The Workspace Voice Interaction window enables you to perform the following functions while you are speaking to the calling agent, prior to joining the conference call:
   - Speak privately with the calling agent about the conference prior to joining the conference.
   - End the call—This function ends your participation in the consultation call; you are not joined to the conference.
   - Put the call on hold and resume the call.
   - Send DTMF by using the keypad.
   - Start a conference call.
   - Transfer the call to a different internal target.
   - For SIP-enabled agents, additional call actions are available:
   - Record the call (see Record Interactions).
   - Mute and unmute the call.
   - Adjust the microphone and speaker volumes.
     For information about how to use the functionality in the interaction window, see the *Workspace 8.5 Help*.
3. If the calling agent joins you to the conference, all three parties can hear and speak to one another. The Workspace Voice Interaction window is updated to display the status of the parties to whom you are talking. The status changes to `Connected` (see the Voice Interaction window, displaying Conferenced status figure).



Voice Interaction window, displaying Conferenced status

When you are in a conference call, you can perform the following functions:

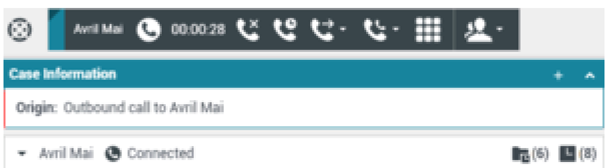
   - Use the Conference Party Action Menu (adjacent to the Party Status) to do the following:
     - **Delete From Conference**—Terminate the connection to the party.
     - **Suspend From Conference**—Disable listening and talking for the selected party.
     - **Reinstate To Conference**—Enable listening and talking for that party.
   - For SIP-enabled agents, additional call actions are available:
     - Record the call (see Lesson: Record Interactions).
     - Mute and unmute the call.

    - Adjust the microphone and speaker volumes.
      For information about how to use the functionality in the interaction window, see the *Workspace 8.5 Help*.

- End the call Terminates your connection to the conference. The calling agent remains connected to the contact.
- Set a disposition code for the call.
- Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.

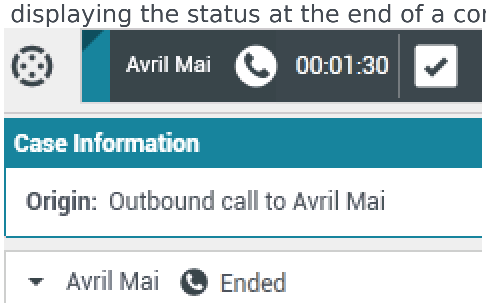
Remaining Connected After the Conferencing Agent Disconnects

If the calling agent releases the call, the calling agent is disconnected, but you remain connected to the contact (see the Voice Interaction window showing that the calling agent has left the conference, but you remain connected to the contact figure). You can complete your call with the contact, transfer the contact, or start a new conference call.



Voice Interaction window showing that the calling agent has left the conference, but you remain connected to the contact

4. Click `End Call` to terminate your connection to the call or conference. The Workspace Voice Interaction window is updated to display the status of the conference as Ended (see the Voice Interaction window, displaying the status at the end of a conference call figure).



Voice Interaction window, displaying the status at the end of a conference call

If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the `Disposition Code` drop-down list or radio-button list in the Disposition Code view (see Assigning Disposition Codes).

5. Click `Mark Done`.
6. Close the Voice Interaction window.
7. Complete your after-call work.
8. Set your status to Ready.

End

Suspending and Reinstating a Party from a Conference

[**Added:** 8.5.109.16]

You can temporarily prevent one party in a conference call from listening to the call or talking in the conference. You might choose to do this so that the suspended party cannot hear confidential information that the party is not permitted to hear. A suspended party hears on hold music until he or she is reinstated to the conference.

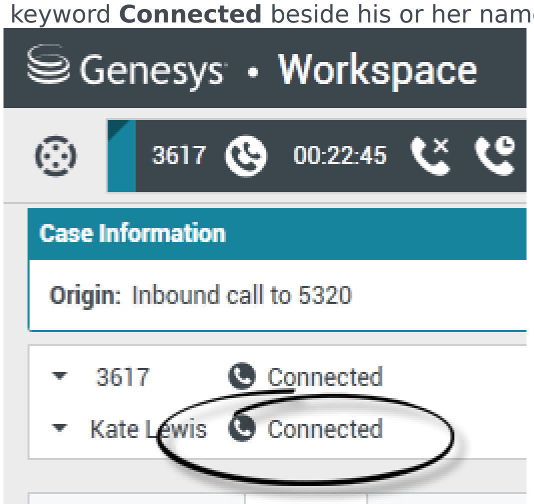
Lesson: Temporarily suspending a party from a voice conference

Purpose: To prevent one party in a conference call from listening to the call or talking in the conference.

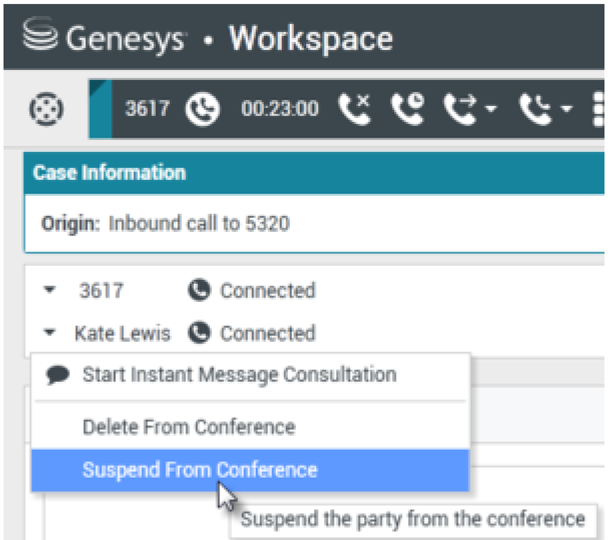
Prerequisites

- 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, Receiving and Handling an Inbound Email Interaction, or Receiving and Handling an Inbound Chat Interaction).
- You have an active consultation call.

Start

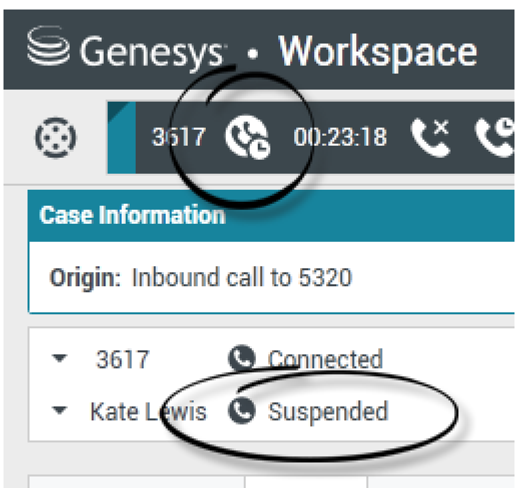
1. During a conference call it might be necessary to prevent one of the parties from listening to the call and from talking in the conference. Use the **Party Status** indicator, beside the **Party Action** menu to determine whether a part is currently able to listen and talk in the conference. Any party with the keyword **Connected** beside his or her name can hear the call and can talk in the conference.


Kate Lewis and 3617 are both connected to the conference call.
2. To prevent a party from hearing the call and talking in the conference, click the **Party Action** menu and select **Suspend From Conference**.



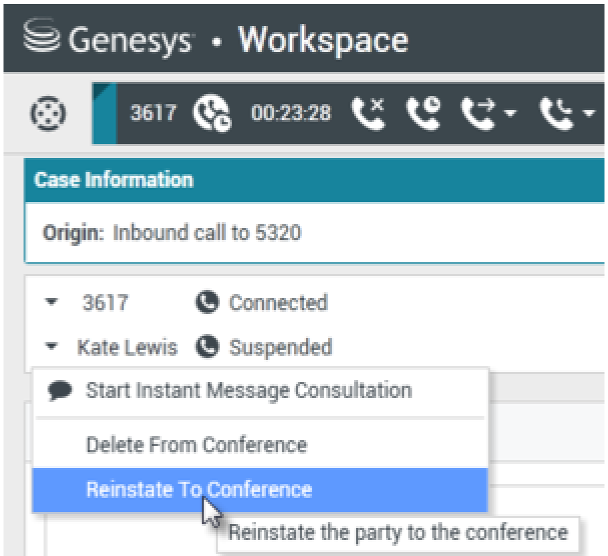
Selecting Suspend From Conference in the Party Action menu of Kate Lewis.

When a party is suspended from a conference, the Call Conference icon () changes to the Call Conference Suspended icon () and the keyword **Suspended** is displayed beside his or her name.



Kate Lewis is suspended from the conference.

3. To allow a suspended party to hear the call and talk in the conference, click the **Party Action** menu and select **Reinstate To Conference**.



Selecting Reinstate To Conference in the Party Action menu of Kate Lewis.

All parties can now listen and talk in the conference.

End

Start a Conference with an Active Consultation

You can add your consultation target to your current interaction by starting a conference with the target. The following procedure demonstrates how to start a voice conference with a party that you are in a voice consultation; however, it is also possible to start a voice conference from other types of consultation, such as IM, by following the same steps that are presented in the procedure.

Lesson: Starting a conference with an active consultation

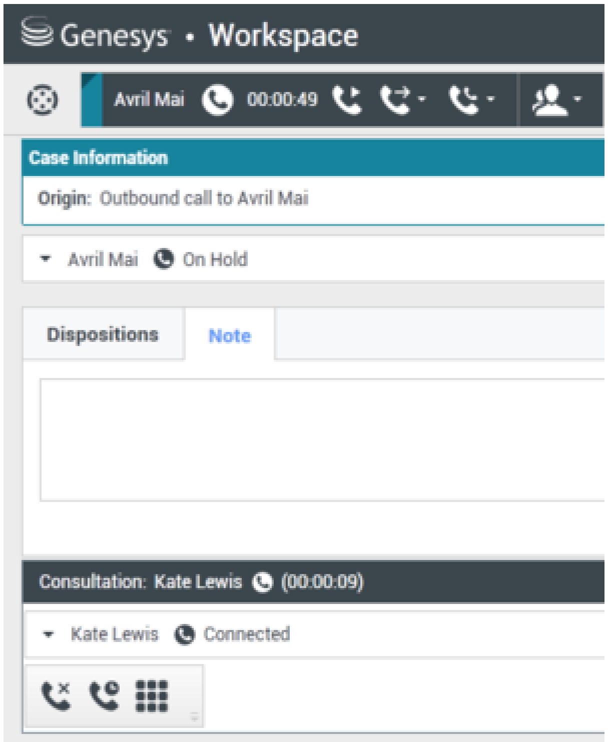
Purpose: Transition your consultation call to a conference call by adding the consultation target to your call.

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, Receiving and Handling an Inbound Email Interaction, or Receiving and Handling an Inbound Chat Interaction).
- You have an active consultation with an internal target (see Lesson: Starting a voice consultation or Lesson: Receiving a voice consultation request).

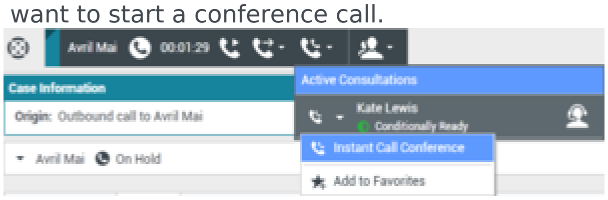
Start

1. To transition an active consultation to a conference, click the `Instant Call Conference` button on the main interaction toolbar (see the Interaction window displaying an active interaction and an active voice consultation figure).



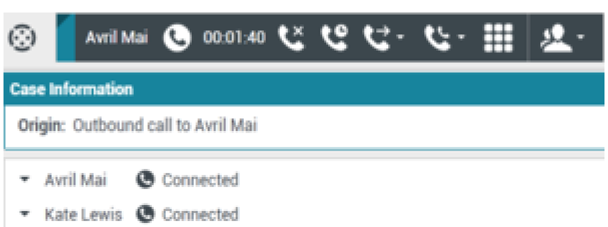
Interaction window displaying an active interaction and an active voice consultation

2. The Team Communicator opens and displays your active consultations (see the Team Communicator in the active interaction window, displaying the Active Consultations figure). Click the `Instant Call Conference` button in the `Action` menu that is next to the name of the consult party with whom you want to start a conference call.



Team Communicator in the active interaction window, displaying the Active Consultations

The consultation interaction is closed and the consultation target is added to the conference call (see the Interaction window displaying a conference call with two parties figure).



Interaction window displaying a conference call with two parties.

3. Complete the conference call by following Lesson: Starting a voice conference.

End

Related Information

- Voice Call help

Record Interactions

In this lesson, you will learn how to use the call recording functionality of Workspace.

This lesson contains the following section:

- Recording a Voice Interaction

Recording a Voice Interaction

The Voice Recording functionality (for VoIP-/SIP-enabled agents only) enables you to record the current voice interaction with a contact or an internal target. You can start a recording, pause a recording, resume a recording, and end a recording.

Your account might also be configured for automatic or system-guided recording. If this is the case, you receive a notification that recording is in progress.

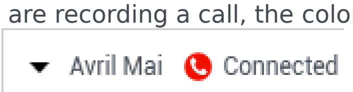
Lesson: Recording a voice interaction

Purpose: To record a voice interaction to be reviewed later by your administrator or supervisor.

Prerequisites

- You are logged in to Workspace (see Lesson: Going Ready in the Workspace Main window).
- You are handling a voice interaction (see Handle A Voice Call).

Start

1. To start the current voice interaction with a contact or an internal target, click `Record the Call` on the toolbar in the Voice Interaction window or in the Interaction Bar on the Main Window (). When you are recording a call, the color of the call icon in the connected-parties area changes to red:


2. To control the recording of the call, use the call-recording control buttons and drop-down menu:
   - To pause the recording of the call, click `Pause Recording the call` ().
   - To resume the recording of the call after you have paused, click `Resume Recording the Call` ().
3. To stop the recording the call, open the call-recording control menu and select `Stop` (). Call recording stops and the color of the call icon in the Call Status area changes back to blue. The file that

contains the contents of the recording of the session is stored on your system network.

End

Related Information

- Voice Recording help

Handle Callback Interactions

[**Added:** 8.5.111.21]

In this lesson, you will learn how to accept a callback voice interaction by using Workspace. This lesson contains the following sections:

- Receiving a Callback Interaction
- Scheduling a Callback Interaction

Receiving a Callback Interaction

A callback interaction is initiated when a contact visits your company's web site or calls your company from a mobile phone and submits a request for an agent to telephone the contact at a time that the contact specifies.

If you are the selected internal target for a callback interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it (answer it), the interaction window is displayed. The interaction window contains information about the call and the controls that you need to complete the interaction.

The Callback Interaction window is similar to the Voice Interaction window (refer to Receiving a Voice Interaction). It enables you to view all the information that is necessary to handle a callback interaction with a contact who has requested a callback.

Lesson: Handling a callback interaction

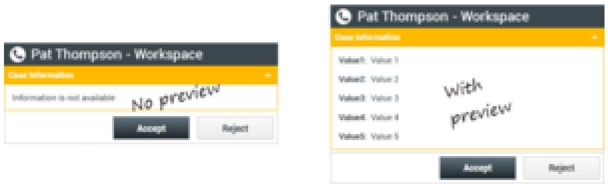
Purpose: To handle a callback voice interaction properly.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- Your status is Ready for the voice channel (see Lesson: Going Ready in the Workspace Main window).
- You are the internal target for the Callback interaction.

Start

1. Your hard phone or soft phone rings, and a preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Callback Interaction Preview interactive notification figure).



Callback Interaction Preview interactive notification

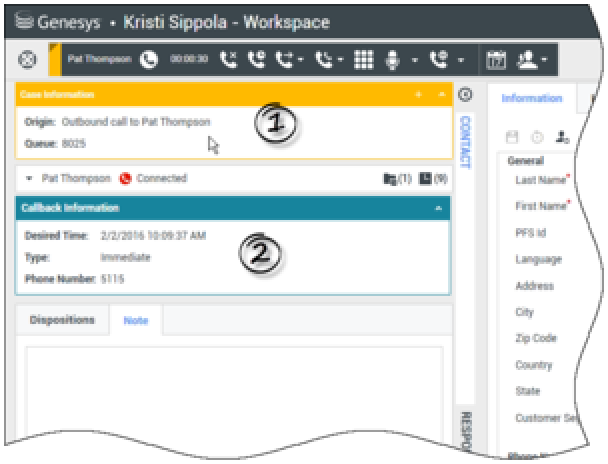
The Interaction Preview contains a summary of call information, including contact information and call metrics. The Interaction Preview might also contain Case Information, which is part of the case data regarding the call. The case data might include information that the contact entered in a form on your company's web page, or on their mobile device, or through an IVR.

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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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.

If your account is configured for auto-answer, the Interaction Preview is not displayed and the call is answered automatically unless your account is configured to enable you to preview the case information before the interaction is auto-answered. In this case, when you receive an auto-answer interaction, the Interaction Preview is displayed on your desktop. A timer that counts down the number of seconds until you are connected to the contact is displayed in the **Accept** button (refer to the following figure). You can click **Accept** before the timer runs out or wait for the timer to run out. The **Reject** button might also be displayed if your administrator wants you to have the option of rejecting an interaction before it is auto-answered.

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click **Accept** to answer the interaction.
   - Click **Reject** to return the interaction to the queue.
   - Do nothing. The interaction will timeout and be redirected.
3. If you accept the interaction, the Callback interaction window is displayed on your desktop. The window contains Case Information and Callback Information.
4. When your are connected to the contact, the Callback Voice Interaction window is displayed on your desktop. The window contains Case Information, call controls, and Callback Information



Callback interaction window. 1–Case Information. 2–Callback Information set up by your administrator.

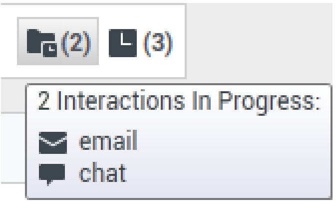
If you connect with the contact successfully You can do any of the following:

- Terminate the call (see Step 6).
- Put the call on hold and retrieve the call. The call status changes to `On Hold`, and then back to `Connected` when you retrieve the call.
- Use the keypad to send DTMF to the contact.
- Start a voice or IM consultation.
- Conference the call (see Starting a Voice Conference).
- Transfer the call (see Transferring a Voice Call).
- View and read standard responses (see Lesson: Using The Standard Response Library).
- For SIP-enabled agents, additional call actions are available:
- Record the call (see Record Interactions).
- Mute and unmute the call.
- Adjust the microphone and speaker volumes.
  Note: For information about how to use the functionality in the interaction window, see the *Workspace 8.5 Help*.

You can also use the Callback Interaction window to do the following:

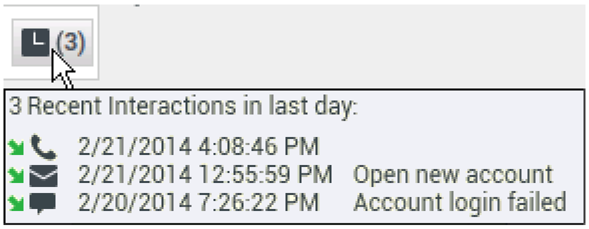
- View contact records. See Lesson: Finding and viewing an interaction in the contact database.
- View contact history. See Managing Contact History.
- Launch the Team Communicator. See Starting a Voice Conference, Transferring a Voice Call, and Blending a voice consultation with an IM consultation.
- Reschedule a different callback time. See the Lesson: Scheduling a callback interaction.
- Set a disposition code. See Assigning Disposition Codes.
- Use the Note to add information about the interaction to the interaction history. See Managing Contact History.
- View and edit the case information for the interaction. See Managing Contact History.

- Link to a web page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.
  If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see the Dynamic Contact History Matrix displaying the number and type of interactions in progress for the current contact figure). Place your mouse pointer over the icon to display the number and type of interactions in progress (except voice interactions) for the current contact.



Dynamic Contact History Matrix displaying the number and type of interactions in progress for the current contact

Your account might be configured to notify you if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Recent interactions matrix displaying the list of interactions with the current contact within the last day figure). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



Recent interactions matrix displaying the list of interactions with the current contact within the last day

- When the interaction is complete, either you or the contact can end the call.
  If you want to terminate the call, click the `End Call` button. The call status returns to `Ready to Call`.
- If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the `disposition code` drop-down list or radio button list in the Disposition Code view (see Assigning Disposition Codes).
- Click `Done`.
- If the Callback Interaction window does not close automatically, close the Callback Interaction window after you have clicked `Done` for each of the active interactions.
- Complete your after-call work.

End

Next Steps

- Set your status to Ready. See Lesson: Going Ready in the Workspace Main window.

Scheduling a Callback Interaction

There are three ways that you can schedule Callback interactions for a contact:

1. From an active interaction
2. From the Team Communicator
3. From the current callback interaction

These three methods open either the **Reschedule Callback** view or the **New Callback** dialog box which enable you to choose a date and time for when the contact will receive a callback interaction from your company.

Lesson: Scheduling a callback interaction

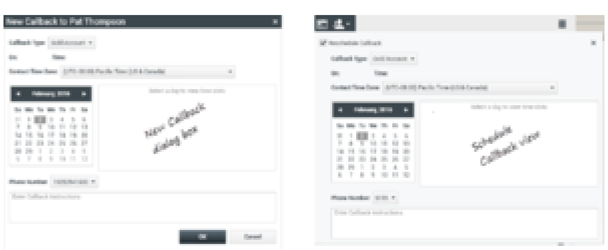
Purpose: To schedule a callback voice interaction properly.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have the correct permissions to schedule callback interactions.

Start

1. Use one of the following three methods to schedule a callback interaction:
    - From a current interaction of other types, such as voice calls, email, or chat, click **Schedule Callback** () to open the **New Callback** view.
    - From Team Communicator, find a contact, then from the **Action Menu**, choose **New Callback** to open the **New Callback** view.
    - From your current callback interaction, in the Interaction Toolbar, click **Reschedule a Callback** () to open the **Reschedule Callback** view.



The New Callback and Reschedule Callback windows use the same features to schedule callback interactions

2. Depending on how you started the callback interaction:
   - In the **New Callback** dialog box, first make the following selections:
     a. Choose a **Callback Type** from the drop-down list. If your contact center does not support different callback types, this menu is not displayed.
     b. Specify the time zone of your contact. This will be selected automatically if this information is available in your contact database.
     c. Choose a date from the calendar picker.
   - In the **Reschedule Callback** view, first make the following selections:
     a. Check **Reschedule Callback**.
     b. Specify the time zone of your contact. This will be selected automatically if this information is available in your contact database.
     c. Choose a date from the calendar picker.
3. After you select a date, the schedule grid becomes active. Use the schedule grid to find a time slot that is shown as available. Available time slots are highlighted in blue when you place your mouse pointer over them. A tooltip indicates the time range and the number of callback appointments that are available in the time slot.

Choosing an available time slot for a callback interaction.

4. Select or enter an alternate phone number if necessary.
5. Add instructions for the agent who will handle the callback in the **Instructions** field.
6. To commit the callback to the system, do one of the following:
   - In the **New Callback** dialog box, click **OK**.
   - In the **Reschedule Callback** view, ensure that the **Reschedule Callback** checkbox is selected, then click anywhere outside of the view.

End

Next Steps

- Set your status to Ready. See Lesson: Going Ready in the Workspace Main window.

Related Information

- Callback Information help

Handle Web Callback Interactions

In this lesson, you will learn how to accept a web callback voice interaction by using Workspace. This lesson contains the following sections:

- Receiving a Web Callback Interaction

Receiving a Web Callback Interaction

A web callback interaction is initiated when a contact visits your company's web site and submits a request for an agent to telephone the contact at a time that the contact specifies.

If you are the selected internal target for a web callback interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it (answer it), the interaction window is displayed. The interaction window contains information about the call and the controls that you need to complete the interaction.

The Web Callback Interaction window is similar to the Voice Interaction window (refer to Receiving a Voice Interaction). It enables you to view all the information that is necessary to handle a web callback interaction with a contact who has requested a callback from your company web page.

Lesson: Handling a web callback interaction

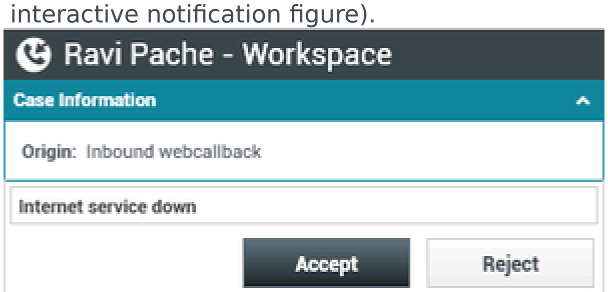
Purpose: To handle a web callback voice interaction properly.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- Your status is Ready for the web callback-media channel (see Lesson: Going Ready in the Workspace Main window).
- You are the internal target for the inbound interaction.

Start

1. Your hard phone or soft phone rings, and a preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Web callback Interaction Preview interactive notification figure).



Web callback Interaction Preview interactive notification

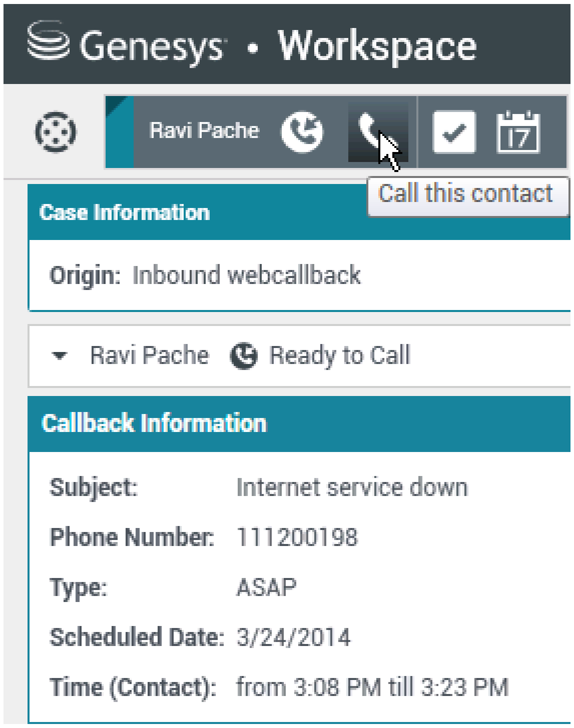
The Interaction Preview contains a summary of call information, including contact information and call metrics. The Interaction Preview might also contain Case Information, which is part of the case data regarding the call. The case data might include information that the contact entered in a form on your company's web page.

> ## 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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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)

If your account is configured for auto-answer, the Interaction Preview is not displayed and the call is answered automatically unless your account is configured to enable you to preview the case information before the interaction is auto-answered. In this case, when you receive an auto-answer interaction, the Interaction Preview is displayed on your desktop. A timer that counts down the number of seconds until you are connected to the contact is displayed in the **Accept** button (refer to the following figure). You can click **Accept** before the timer runs out or wait for the timer to run out. The **Reject** button might also be displayed if your administrator wants you to have the option of rejecting an interaction before it is auto-answered.[**Added:** 8.5.105.12]

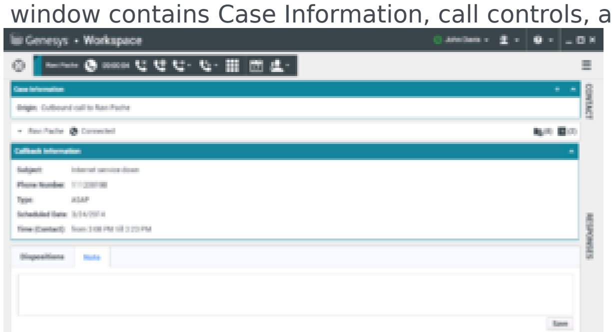
2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to answer the interaction.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will timeout and be redirected.
3. If you accept the interaction, the Web Callback interaction window is displayed on your desktop. The window contains Case Information and Callback Information. The status of the call is `Ready to Call`. In this state, you can review the Case Information and the Callback Information before you connect the call to the contact. Callback Information provides you with the subject of the call, the number provided by the contact, and the scheduled date and time for the call.

   Click **Call this contact** to call the contact (see the Web Callback interaction window case and callback information figure). The call status changes to `Establishing` until the contact answers the call. If the call times out because the line is busy or the contact does not answer, the status returns to `Ready to Call`.



Web Callback interaction window case and callback information.

4. When the contact answers and the Callback Voice Interaction window is displayed on your desktop. The window contains Case Information, call controls, and Callback Information



Web Callback interaction window.

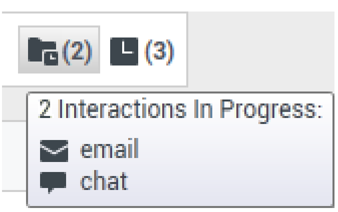
If you connect with the contact successfully You can do any of the following:

- Terminate the call (see Step 6).
- Put the call on hold and retrieve the call. The call status changes to `On Hold`, and then back to `Connected` when you retrieve the call.
- Use the keypad to send DTMF to the contact.
- Start a voice or IM consultation.
- Conference the call (see Starting a Voice Conference).
- Transfer the call (see Transferring a Voice Call).
- View and read standard responses (see Lesson: Using The Standard Response Library).
- For SIP-enabled agents, additional call actions are available:

- Record the call (see Record Interactions).
- Mute and unmute the call.
- Adjust the microphone and speaker volumes.
  Note: For information about how to use the functionality in the interaction window, see the *Workspace 8.5 Help*.

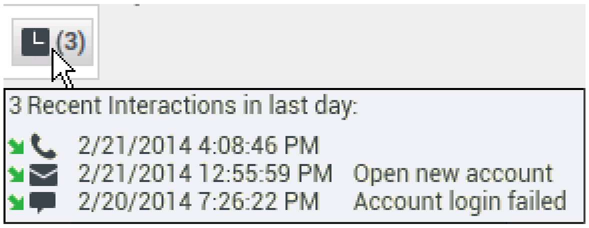
You can also use the Web Callback Interaction window to do the following:

- View contact records. See Lesson: Finding and viewing an interaction in the contact database.
- View contact history. See Managing Contact History.
- Launch the Team Communicator. See Starting a Voice Conference, Transferring a Voice Call, and Blending a voice consultation with an IM consultation.
- Reschedule the callback to a different time. See the Lesson: Rescheduling a call as a callback.
- Set a disposition code. See Assigning Disposition Codes.
- Use the Note to add information about the interaction to the interaction history. See Managing Contact History.
- View and edit the case information for the interaction. See Managing Contact History.
- Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.
  If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see the Dynamic Contact History Matrix displaying the number and type of interactions in progress for the current contact figure). Place your mouse pointer over the icon to display the number and type of interactions in progress (except voice interactions) for the current contact.



Dynamic Contact History Matrix displaying the number and type of interactions in progress for the current contact

Your account might be configured to notify you if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Recent interactions matrix displaying the list of interactions with the current contact within the last day figure). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



Recent interactions matrix displaying the list of interactions with the current contact within the last day

- When the interaction is complete, either you or the contact can end the call. If you want to terminate the call, click the `End Call` button. The call status returns to `Ready to Call`.
- If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the `disposition code` drop-down list or radio button list in the Disposition Code view (see Assigning Disposition Codes).
- Click `Done`.
- If the Web Callback Interaction window does not close automatically, close the Web Callback Interaction window after you have clicked `Done` for each of the active interactions.
- Complete your after-call work.

End

Next Steps

- Set your status to Ready. See Lesson: Going Ready in the Workspace Main window.

Related Information

- Web Callback help

Handle Outbound-Campaign Voice Interactions

[**Modified:** 8.5.115.17, 8.5.145.06]

In this lesson, you will learn how to handle an outbound-campaign voice interaction by using Workspace. This lesson contains the following sections:

- Outbound Campaigns
- Handling an Outbound-Campaign Voice Interaction

Outbound Campaigns

As an agent, you might be working on calling campaigns (for example: collections, telemarketing, or fund raising) in which the contact interactions are outbound voice calls that are based on calling a predetermined list of contacts.

> **Warning**
> To participate in Outbound Campaigns, you must *not* be logged in to the Instant Messaging Channel.

There are two delivery modes of outbound calls, manual and automatic. Your supervisor determines in which mode you will work.

In manual mode, you make outbound calls by requesting an interaction from a preset calling list. Manual delivery has one dialing mode:

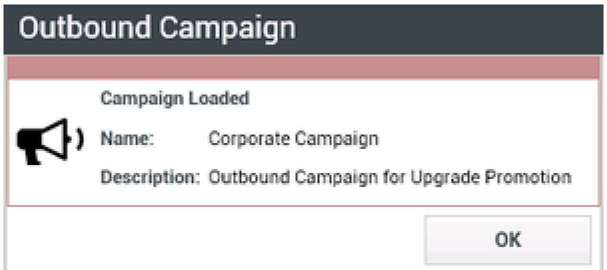
- **Preview**—The system displays contact-related data to you, and then you make the call to the contact.

In automatic mode, outbound calls are directed to your desktop. Automatic delivery has three dialing modes:

- **Push Preview**—The system displays contact-related data to you, and then you make the call to the contact.
- **Progressive**—The system dials customer numbers automatically and transfers a call to you only if the connection was successfully established.
- **Predictive**—The system estimates the number of free agents on the basis of current statistics, and might start to dial before any agents are free.

Starting and Stopping an Outbound Campaign

If your supervisor or someone else at your company loads into Genesys Outbound Contact Manager an Outbound Campaign to which you are assigned, you will receive a warning message that informs you that a specific campaign has begun and that you are assigned to that campaign (see the Outbound Campaign Loaded message box figure).

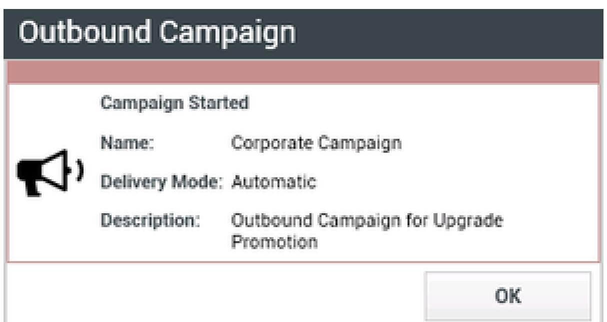


Outbound Campaign Loaded message box

The message box contains information about the Outbound Campaign. Your administrator determines the content of the message box and the information that is provided to you.

Click OK to close the message box.

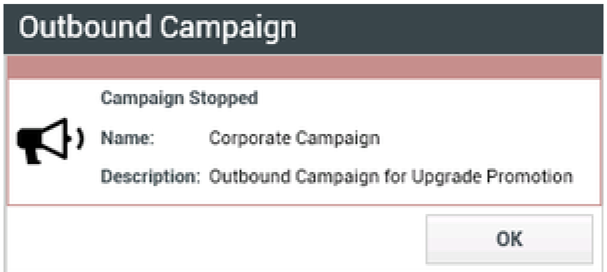
When the Outbound Campaign begins and outbound interactions are going to be directed to your desktop (or made available to you in the case of Preview campaigns), the `Campaign Started` message is displayed on your desktop (see the Outbound Campaign Started message box figure).



Outbound Campaign Started message box

Click OK to close the message box.

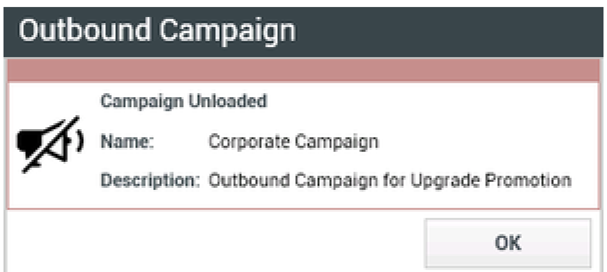
When the Outbound Campaign ends and no more outbound interactions are going to be directed to your desktop, the `Campaign Stopped` message is displayed on your desktop (see the Outbound Campaign Stopped message box figure).



Outbound Campaign Stopped message box

Click OK to close the message box.

When your administrator unloads the Outbound Campaign from Genesys Outbound Contact Manager, the `Campaign Unloaded` message box is displayed (see the Outbound Campaign Unloaded message box figure). You will no longer receive interactions from the unloaded campaign unless it is loaded and started again.



Outbound Campaign Unloaded message box

Click OK to close the message box.

Handling an Outbound-Campaign Voice Interaction

This section shows you how to handle interactions for the four types of Outbound Campaign that are supported by Workspace. The agent workflow for Predictive and Progressive campaigns are identical; only the timing of the arrival of the interaction on your desktop and the connection to the contact are different.

In Preview interactions (also called pull-preview), you must request the next contact record. In push-preview interactions you are given the opportunity to view the Outbound Campaign interaction and connect manually to the contact or send the record back to the calling list.

This section contains the following procedures:

- Lesson: Handling a predictive or progressive Outbound-Campaign voice interaction
- Lesson: Handling an ASM predictive or progressive Outbound-Campaign voice interaction
- Assured Connection calls
- Lesson: Handling a preview Outbound-Campaign voice interaction
- Lesson: Handling a push-preview Outbound-Campaign voice interaction

- Lesson: Rescheduling a call as a callback

Lesson: Handling a predictive or progressive Outbound-Campaign voice interaction

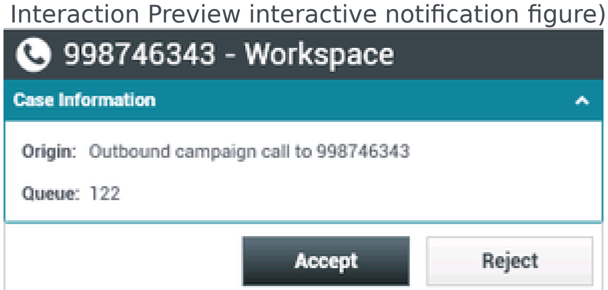
Purpose: To handle a predictive or progressive Outbound Campaign voice interaction properly.

Prerequisites

- You are logged in to Workspace (see Getting Started).
- You are *not* logged in to the Instant Messaging channel.
- Your status is Ready for the voice-media channel (see Lesson: Going Ready in the Workspace Main window).
- You are part of a predictive or progressive Outbound Campaign.
- You have been notified that the campaign is loaded and running (see Starting and Stopping an Outbound Campaign).

Start

1. Your hard phone or soft phone rings, and a preview of the outbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Outbound Predictive/Progressive Voice Interaction Preview interactive notification figure).

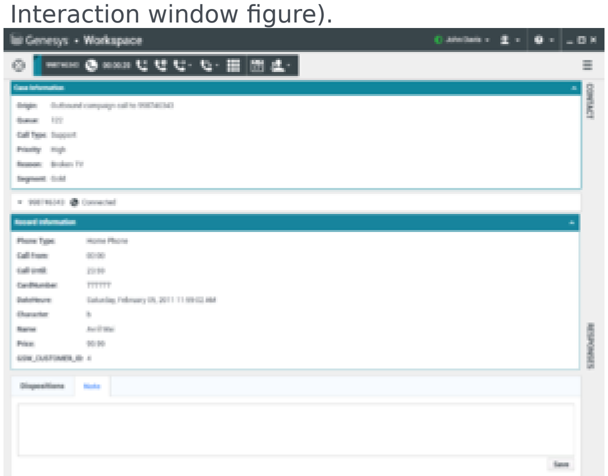


Outbound Predictive/Progressive Voice Interaction Preview interactive notification

The Interaction Preview contains a summary of call and campaign information. The Interaction Preview might also contain Case Information, which is part of the case data related to the call. Contact your system administrator for more information about the contents of this window.

> **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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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)

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
    - Click `Accept` to call the contact.
    - Click `Reject` to return the interaction to the queue.
    - Do nothing. The interaction will time out and be redirected.
3. If you accept the interaction, the call is connected in your hard phone or soft phone, and the Outbound Voice Interaction window is displayed (see the Predictive/Progressive Outbound Campaign Voice Interaction window figure).



Predictive/Progressive Outbound Campaign Voice Interaction window

You can use the Outbound Campaign Voice Interaction window to do the following:

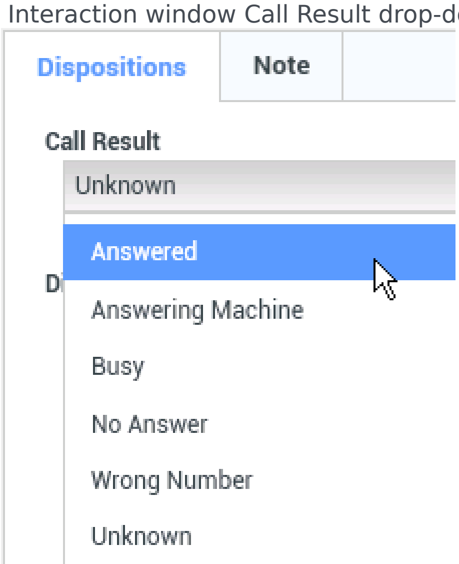
- View contact records (see Lesson: Finding and viewing an interaction in the contact database).
- View contact history (see Managing Contact History).
- Set a call result and a disposition code, or add the contact to the Do Not Call list (see Step 5).
- Use the Note to add information about the interaction to the interaction history (see Managing Contact History).
- View and edit the Case Information—Summary information about the campaign. It might contain the name of the campaign, a description of the campaign, the phone number of the contact, and so on.
- View and edit the Record Information—Specific information about the record. It might contain a range of time for which the contact has indicated availability, the name of the contact, or information about the nature of the call.
- View and read responses (see Lesson: Using The Standard Response Library).
- Terminate the call (see Step 4).
- Put the call on hold and retrieve the call. The call status changes to `On Hold`, and then back to `Connected` when you retrieve the call.
- Use the keypad to send DTMF to the contact.
- Start a voice consultation (see Starting a Voice Consultation).
- Transfer the call (see Transferring a Voice Call).

Important

- When you transfer an ASM call, the outbound record is also transferred. The ownership of the record might also be transferred to the target agent, depending on how your system is set up.
- You might have to set a call result or disposition before you complete a transfer or a conference to another agent, for example to a back office worker. If you forget, an error message is displayed and you are prevented from transferring the call unless you set the call result. After this action, the Call Result and Record Information becomes read-only. [**Added:** 8.5.117.18]

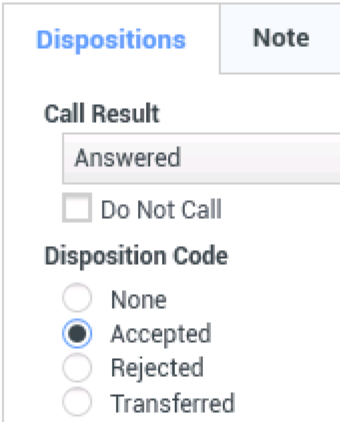
- Reschedule a call as a callback (see Lesson: Rescheduling a call as a callback).
  Note: For information about how to use the functionality in the interaction window, see the *Workspace 8.5 Help*.

4. When the interaction is complete, either you or the contact can end the call. If you want to terminate the call, click the `End Call` button.
5. If required by your configuration, specify a call result and/or a disposition code that qualifies the outcome of the interaction.
   a. Click the `Dispositions` tab to make it active.
   b. (Optional) In the `Call Result` drop-down list, select a call result (see the Outbound Campaign Interaction window Call Result drop-down list figure).



Outbound Campaign Interaction window Call Result drop-down list

   c. (Optional) Select an outcome from the `Disposition Code` drop-down list or radio-button list in the Disposition Code view (see the Outbound Campaign Interaction window Call Result and Disposition Code views figure and also Assigning Disposition Codes).



Outbound Campaign Interaction window
Call Result and Disposition Code views

d. (Optional) If the contact requests to be put on the Do Not Call list, select `Do Not Call` in the `Call Result` view (see the Outbound Campaign Interaction window Call Result and Disposition Code views figure).

e. Click `Mark Done`. This step might be performed for you automatically when you end the call or set a disposition code.

f. If the Voice Interaction window does not close automatically, close the Voice Interaction window after you have clicked `Mark Done` for each of the active interactions.

g. Complete your after-call work.

h. Set your status on the Voice channel to Ready to receive the next call.

End

Next Steps

- Set your status to Ready. See Lesson: Going Ready in the Workspace Main window.

Lesson: Handling an ASM predictive or progressive Outbound-Campaign voice interaction

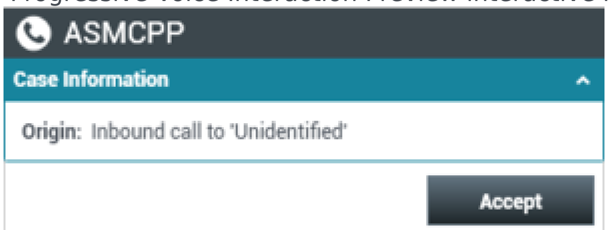
Purpose: To handle an ASM predictive or progressive Outbound Campaign voice interaction properly.

Prerequisites

- You are logged in to Workspace (see Getting Started).
- You are *not* logged in to the Instant Messaging channel.
- Your status is Ready for the voice-media channel (see Lesson: Going Ready in the Workspace Main window).
- You are part of an ASM predictive or progressive Outbound Campaign.

- You have been notified that the campaign is loaded and running (see Starting and Stopping an Outbound Campaign).

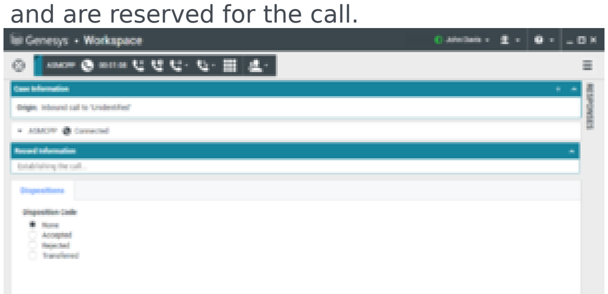
Start

1. Your hard phone or soft phone rings, and a preview of the outbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Outbound ASM mode Predictive/Progressive Voice Interaction Preview interactive notification figure).


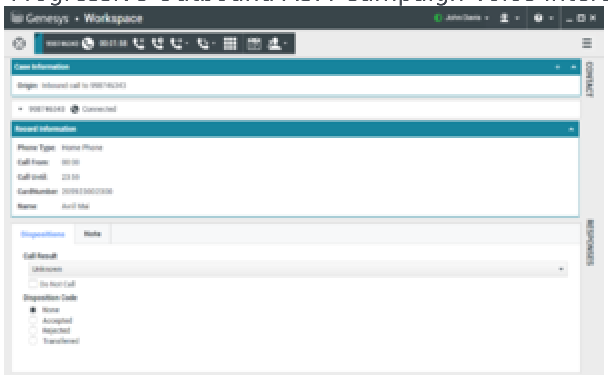
Outbound ASM mode Predictive/Progressive Voice Interaction Preview interactive notification

The Interaction Preview contains a summary of call and campaign information. The Interaction Preview might also contain Case Information, which is part of the case data related to the call. Contact your system administrator for more information about the contents of this window.

> ## 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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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)

2. You can choose to accept or redirect the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to call the contact.
   - Do nothing. The interaction will time out and be redirected.
3. If you accept the interaction, the Outbound ASM voice-interaction window is displayed (see the Outbound ASM Voice Interaction Window in Establishing state figure). The call is in `Establishing` state, which means that the call is not yet connected to the contact. However, you are connected to the call and are reserved for the call.

Outbound ASM Voice Interaction Window in Establishing state
4. As soon as the contact answers you are connected to the contact. The call is connected in your hard phone or soft phone, and the Outbound Voice Interaction window is displayed (see the Predictive/

Progressive Outbound ASM Campaign Voice Interaction window figure).



Predictive/Progressive Outbound ASM Campaign Voice Interaction window

You can use the Outbound Campaign Voice Interaction window to do the following:

- View contact records (see Lesson: Finding and viewing an interaction in the contact database).
- View contact history (see Managing Contact History).
- Set a call result and a disposition code, or add the contact to the Do Not Call list (see Step 5).
- Use the Note to add information about the interaction to the interaction history (see Managing Contact History).
- View and edit the Case Information—Summary information about the campaign. It might contain the name of the campaign, a description of the campaign, the phone number of the contact, and so on.
- View and edit the Record Information—Specific information about the record. It might contain a range of time for which the contact has indicated availability, the name of the contact, or information about the nature of the call.
- View and read responses (see Lesson: Using The Standard Response Library).
- Terminate the call (see Step 4).
- Put the call on hold and retrieve the call. The call status changes to `On Hold`, and then back to `Connected` when you retrieve the call.
- Use the keypad to send DTMF to the contact.
- Start a voice consultation (see Starting a Voice Consultation).
- Transfer the call (see Transferring a Voice Call).

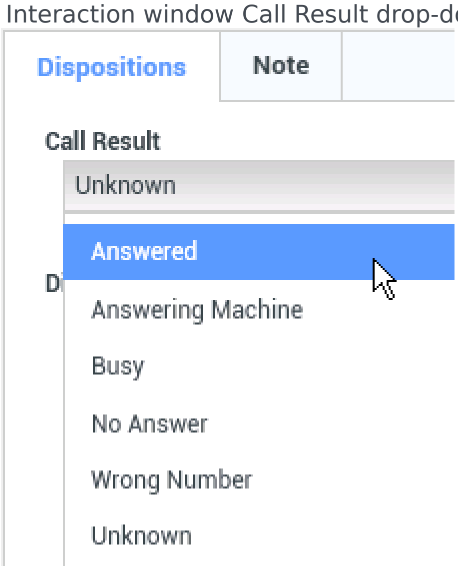
Important

- When you transfer an ASM call, the outbound record is also transferred. The ownership of the record might also be transferred to the target agent, depending on how your system is set up.
- You might have to set a call result or disposition before you complete a transfer or a conference to another agent, for example to a back office worker. If you forget, an error message is displayed and you are prevented from transferring the call unless you set the call result. After this action, the Call Result and Record

Information becomes read-only. [**Added:** 8.5.117.18]

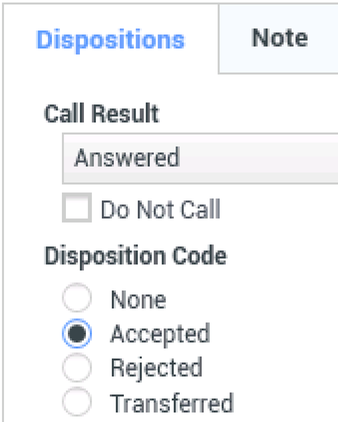
- Reschedule a call as a callback (see Lesson: Rescheduling a call as a callback).
  Note: For information about how to use the functionality in the interaction window, see the *Workspace 8.5 Help*.

5. When the interaction is complete, either you or the contact can end the call. If you want to terminate the call, click the `End Call` button.
6. If required by your configuration, specify a call result and/or a disposition code that qualifies the outcome of the interaction.
   a. Click the `Dispositions` tab to make it active.
   b. (Optional) In the `Call Result` drop-down list, select a call result (see the Outbound Campaign Interaction window Call Result drop-down list figure).



Outbound Campaign Interaction window Call Result drop-down list

   c. (Optional) Select an outcome from the `Disposition Code` drop-down list or radio-button list in the Disposition Code view (see the Outbound Campaign Interaction window Call Result and Disposition Code views figure and also Assigning Disposition Codes).



Outbound Campaign Interaction window
Call Result and Disposition Code views

d. (Optional) If the contact requests to be put on the Do Not Call list, select `Do Not Call` in the `Call Result` view (see the Outbound Campaign Interaction window Call Result and Disposition Code views figure).

7. Click `Mark Done`. This step might be performed for you automatically when you end the call or set a disposition code.
8. If the Voice Interaction window does not close automatically, close the Voice Interaction window after you have clicked `Mark Done` for each of the active interactions.
9. Complete your after-call work.
10. Set your status on the Voice channel to Ready to receive the next call.

End

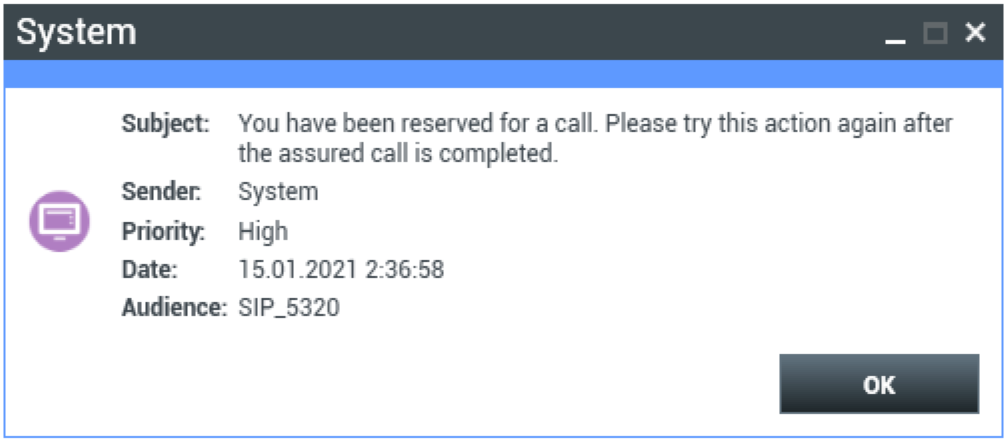
Assured Connection calls

[**Added:** 8.5.145.06]

Some Progressive and Predictive campaigns use Assured Connection mode to reserve an agent before the call is connected to a contact. Reserving an agent ensures that there is no delay for a contact when he or she answers the call. This mode is typically used for VIP or high-value customers in a calling list.

In Assured Connection mode, you are called by the campaign before the contact is dialed. This is known as the Engaging Phase. When you Accept an Assured Connection call, the interaction is displayed on your desktop and the status is **Connected**. During the Engaging Phase you hear call waiting music to let you know that the call is engaged.

If you are reserved for a call, you are restricted from performing certain tasks, including logging off the Voice channel, starting a new call, and exiting Workspace. If you attempt to perform certain actions during the Engaging phase, you might see a message like this one:



Once you are connected to your contact, you handle the call as a normal Outbound Campaign call.

Lesson: Handling a preview Outbound-Campaign voice interaction

[**Modified:** 8.5.115.17]

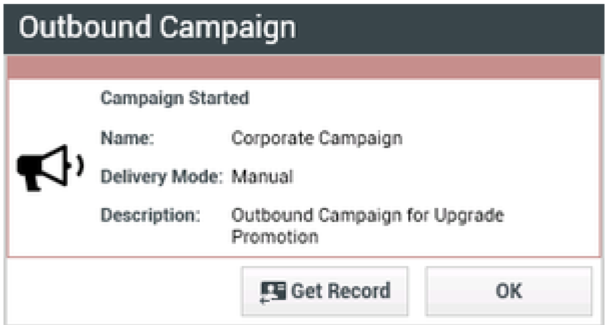
Purpose: To handle a preview Outbound-Campaign voice interaction properly.

Prerequisites

- You are logged in to Workspace (see Getting Started).
- You are *not* logged in to the Instant Messaging channel.
- You are part of a preview Outbound Campaign.
- You have been notified that the campaign is loaded and running (see Starting and Stopping an Outbound Campaign).

Start

1. When a Preview Outbound Campaign is started, you are notified by an interactive message (see the Outbound Campaign Started message box for Preview mode campaigns figure).

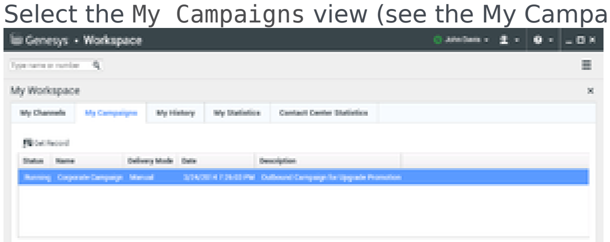


Outbound Campaign Started message box for Preview mode campaigns

Perform one of the following steps:

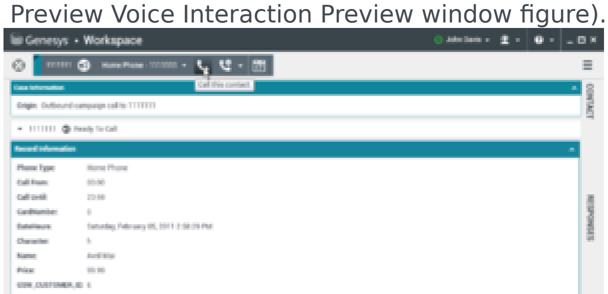
- Click `Get Record` to retrieve and preview the next available campaign record (see Step 6).
- Click `OK` to close the message box (see Step 2).
- Do nothing. The message box closes after a specified time interval (see Step 2).

2. When you are ready to get a contact record, open your Workspace view (refer to the *Workspace 8.5 Help* to learn about how to display your Workspace view from the Main Window).
3. Select the `My Campaigns` view (see the My Campaigns view in the Main Window figure).



My Campaigns view in the Main Window

4. Select the Preview campaign to which you are assigned (see the My Campaigns view in the Main Window figure).
5. Click `Get Record`.
6. A preview of the outbound interaction is displayed on your workstation desktop (see the Outbound Preview Voice Interaction Preview window figure).



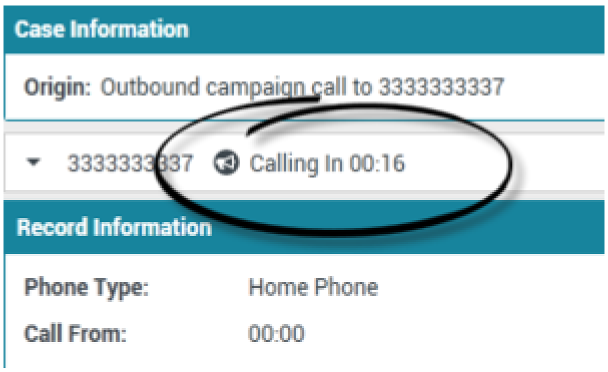
Outbound Preview Voice Interaction Preview window

The Interaction Preview contains a summary of call and campaign information. The Interaction Preview might also contain Case Information, which is part of the case data related to the call. Contact your system administrator for more information about the contents of this window.

[+] Show: Auto-dial and timed auto-dial

In some contact centers, administrators might have set up preview campaigns that automatically dial the call after you get a record or accept an interaction. In this scenario, you are automatically connected to contacts. Skip the next step.

In some contact centers, adminstrators might have set up preview campaigns that automatically dial the contact in a specific number of seconds after you get or accept a record. In this scenario, the Interaction Preview displays a timer that informs you about how many seconds you have to view the preview before the call is automatically connected.



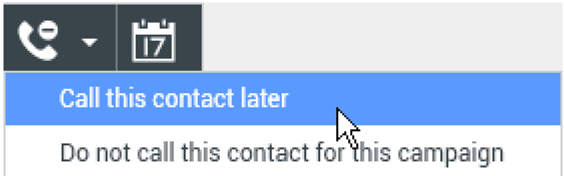
A timer is displayed if your account is set up to enable you to view the Interaction Preview before the call is automatically connected.

7. If your account is not configured for auto-dial, you can choose to do any of the following:
   - Change the contact phone number—Click the phone number, and select a new one from the drop-down list or choose `Other Phone Number` ([**Added:** 8.5.115.17]) if this feature is available in your environment to open the **New Phone Number** dialog box. If you have to change the phone number and the number you want to call is not part of the phone number selection menu, do the following:
     i. Select `Other Phone Number` to open the **New Phone Number** dialog box. If your account is configured for timed auto-dial, the timer pauses until you click `Call` or `Cancel`.
     ii. Enter the new phone number.
     iii. Select a phone number type.
     iv. Click `Call` to call the contact or `Cancel` to close the **New Phone Number** dialog box without dialing a new number.

[**Added:** 8.5.115.17]

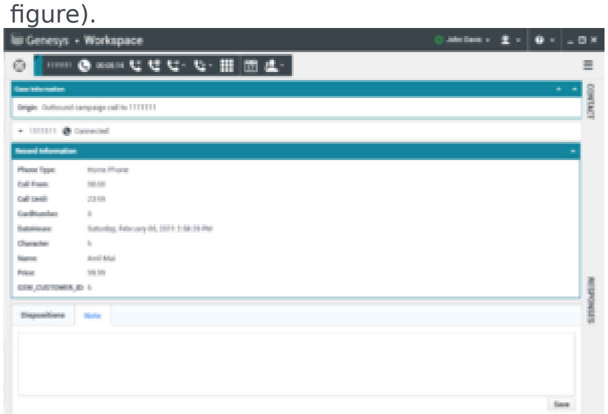
   - Call the contact—Click `Call` to display the Outbound Campaign Voice Interaction window (see Step 8).

- Decline the call—Click the `Decline` button and choose either to send the record back into the queue by selecting `Call this contact later` or to cancel the record by selecting `Do not call this contact for this campaign`.



Click `Done` to get the next record from the campaign calling list. Click `Done and Stop` to stop receiving new records.

8. If you choose to call the contact, the call is connected in your hard phone or soft phone, and the Outbound Voice Interaction window is displayed (see the Outbound Campaign Voice Interaction window figure).



Outbound Campaign Voice Interaction window

You can use the Outbound Campaign Voice Interaction window to do the following:

- Set a call result and a disposition code, or add the contact to the Do Not Call list (see Step 10).
- View and edit the Case Information—Summary information about the campaign. It might contain the name of the campaign, a description of the campaign, the phone number of the contact, and so on.
- View and edit the Record Information—Specific information about the record. It might contain a range of time for which the contact has indicated availability, the name of the contact, or information about the nature of the call.
- View and read responses (see Lesson: Using The Standard Response Library).
- Terminate the call (see Step 9).
- Put the call on hold and retrieve the call. The call status changes to `On Hold`, and then back to `Connected` when you retrieve the call.
- Use the keypad to send DTMF to the contact.
- Start a voice consultation (see Starting a Voice Consultation).
- Transfer the call (see Transferring a Voice Call).

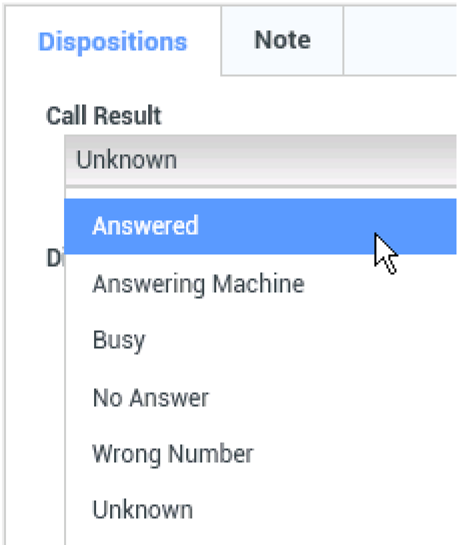
> ## Important
>
> - When you transfer an ASM call, the outbound record is also transferred. The ownership of the record might also be transferred to the target agent, depending on how your system is set up.
> - You might have to set a call result or disposition before you complete a transfer or a conference to another agent, for example to a back office worker. If you forget, an error message is displayed and you are prevented from transferring the call unless you set the call result. After this action, the Call Result and Record Information becomes read-only. [**Added:** 8.5.117.18]

- Conference the call (see Starting a Voice Conference).

> ## Important
>
> You might have to set a call result or disposition before you transfer or conference a call to another agent, for example to a back office worker. If you forget, an error message is displayed and you are prevented from transferring the call unless you set the call result. After this action, the Call Result and Record Information becomes read-only. [**Added:** 8.5.117.18]

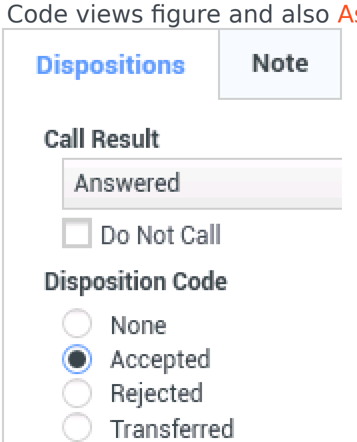
- Reschedule a call as a callback (see Lesson: Rescheduling a call as a callback).
  Note: For information about how to use the functionality in the interaction window, see the *Workspace 8.5 Help*.

9. When the interaction is complete, either you or the contact can end the call. If you want to terminate the call, click the `End Call` button.
10. If required by your configuration, specify a call result and/or a disposition code that qualifies the outcome of the interaction.
    a. Click the `Dispositions` tab to make it active.
    b. (Optional) In the `Call Result` drop-down list, select a call result (see the Outbound Campaign Interaction window Call Result drop-down list figure).



Outbound Campaign Interaction window Call Result drop-down list

c. (Optional) Select an outcome from the `Disposition Code` drop-down list or radio-button list in the Disposition Code view (see the Outbound Campaign Interaction window Call Result and Disposition Code views figure and also Assigning Disposition Codes).

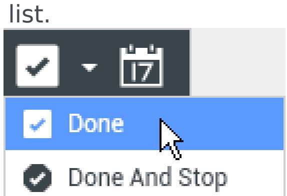


Outbound Campaign Interaction window Call Result and Disposition Code views

d. (Optional) If the contact requests to be put on the Do Not Call list, select `Do Not Call` in the `Call Result` view (see the Outbound Campaign Interaction window Call Result and Disposition Code views figure).

11. Click `Mark Done`. This step might be performed for you automatically when you end the call or set a disposition code. The Done button contains a drop-down list that you can use to do the following:

- Click Done to mark the interaction as Done, and to get the next record from the campaign calling list.



    - Click `Done and Stop` to mark the interaction as Done, and not have another record open automatically. To get a new record, see Step 2.

12. If the Voice Interaction window does not close automatically, close the Voice Interaction window after you have clicked `Mark Done` for each of the active interactions.
13. Complete your after-call work.

End

Next Steps

- Set your status to Ready. See Lesson: Going Ready in the Workspace Main window.

Lesson: Handling a push-preview Outbound-Campaign voice interaction

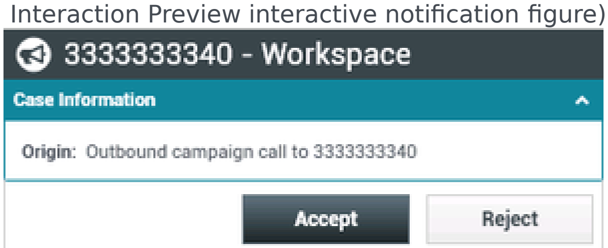
Purpose: To handle a push-preview Outbound Campaign voice interaction properly.

Prerequisites

- You are logged in to Workspace (see Getting Started).
- You are *not* logged in to the Instant Messaging channel.
- Your status is Ready for the voice-media channel (see Lesson: Going Ready in the Workspace Main window).
- You are part of a push-preview Outbound Campaign.
- You have been notified that the campaign is loaded and running (see Starting and Stopping an Outbound Campaign).

Start

1. Your hard phone or soft phone rings, and a preview of the outbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Outbound Push-Preview Voice Interaction Preview interactive notification figure).



Outbound Push-Preview Voice Interaction Preview interactive notification

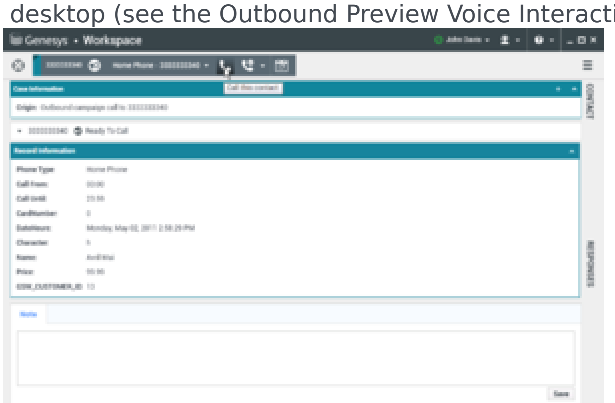
The Interaction Preview contains a summary of call and campaign information. The Interaction Preview might also contain Case Information, which is part of the case data related to the call. Contact your system administrator for more information about the contents of this window.

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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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)

If your account is set up for auto-answer, the Interaction Preview is not displayed and the call is answered automatically unless your account is set up to enable you to preview the case information before the interaction is auto-answered. In this case, when you receive an auto-answer interaction, the Interaction Preview is displayed on your desktop. A timer that counts down the number of seconds until you are connected to the contact is displayed in the **Accept** button (refer to the following figure). You can click **Accept** before the timer runs out or wait for the timer to run out. The **Reject** button might also be displayed if your administrator wants you to have the option of rejecting an interaction before it is auto-answered.[**Added:** 8.5.105.12]

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to call the contact.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will time out and be redirected.
3. If you accept the interaction, a preview of the outbound interaction is displayed on your workstation desktop (see the Outbound Preview Voice Interaction Push-Preview window figure).



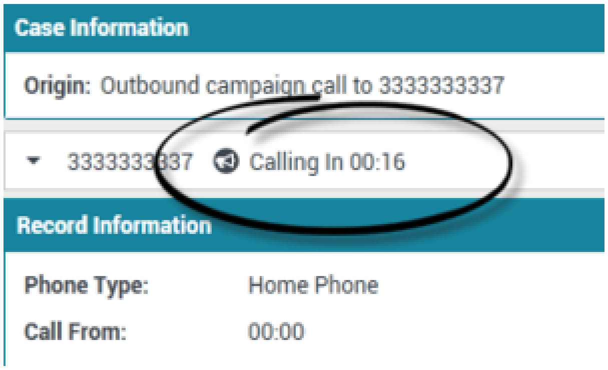
Outbound Preview Voice Interaction Push-Preview window

The Interaction Preview contains a summary of call and campaign information. The Interaction Preview might also contain Case Information, which is part of the case data related to the call. Contact your system administrator for more information about the contents of this window.

[+] Show: Auto-dial and timed auto-dial

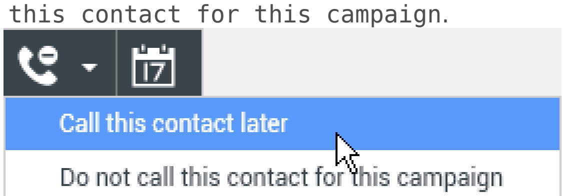
In some contact centers, administrators might have set up preview campaigns that automatically dial the call after you get a record or accept an interaction. In this scenario, you are automatically connected to contacts. Skip the next step.

In some contact centers, adminstrators might have set up preview campaigns that automatically dial the contact in a specific number of seconds after you get or accept a record. In this scenario, the Interaction Preview displays a timer that informs you about how many seconds you have to view the preview before the call is automatically connected.

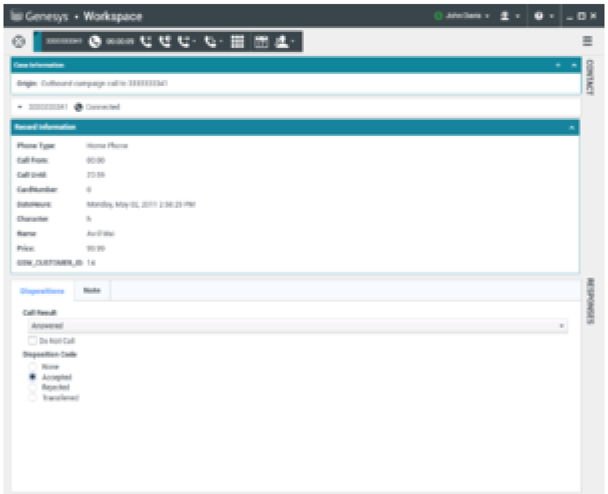


A timer is displayed if your account is set up to enable you to view the Interaction Preview before the call is automatically connected.

4. You can choose to do any of the following:
    - Change the contact phone number—Click the phone number and select a new one from the drop-down list.
    - Call the contact—Click `Call` to display the Outbound Campaign Voice Interaction window (see Step 5).
    - Decline the record—Click the `Decline` button and choose either to send the record back into the queue by selecting `Call this contact later` or to cancel the record by selecting `Do not call this contact for this campaign`.



5. Click Done to get the next record from the campaign calling list.
    - View contact records (see Lesson: Finding and viewing an interaction in the contact database).
    - View contact history (see Managing Contact History).
6. If you choose to call the contact, the call is connected in your hard phone or soft phone, and the Outbound Voice Interaction window is displayed (see the Push-Preview Outbound Campaign Voice Interaction window figure).



Push-Preview Outbound Campaign Voice Interaction window

You can use the Outbound Campaign Voice Interaction window to do the following:

- View contact records (see Lesson: Finding and viewing an interaction in the contact database).
- View contact history (see Managing Contact History).
- Set a call result and a disposition code, or add the contact to the Do Not Call list (see Step 7).
- Use the Note to add information about the interaction to the interaction history (see Managing Contact History).
- View and edit the Case Information—Summary information about the campaign. It might contain the name of the campaign, a description of the campaign, the phone number of the contact, and so on.
- View and edit the Record Information—Specific information about the record. It might contain a range of time for which the contact has indicated availability, the name of the contact, or information about the nature of the call.
- View and read responses (see Lesson: Using The Standard Response Library).
- Terminate the call (see Step 6).
- Put the call on hold and retrieve the call. The call status changes to `On Hold` and then back to `Connected` when you retrieve the call.
- Use the keypad to send DTMF to the contact.
- Start a voice consultation (see Starting a Voice Consultation).
- Transfer the call (see Transferring a Voice Call).

Important

- When you transfer an ASM call, the outbound record is also transferred. The ownership of the record might also be transferred to the target agent, depending on how your system is set up.
- You might have to set a call result or disposition before you complete a transfer or a conference to another agent, for example to a back office worker. If you forget,

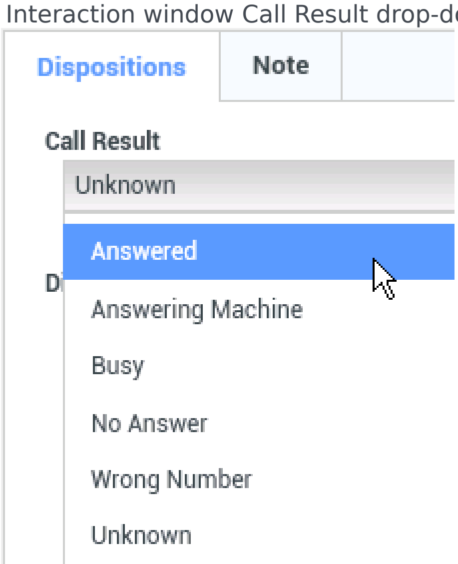
> an error message is displayed and you are prevented from transferring the call unless you set the call result. After this action, the Call Result and Record Information becomes read-only. [**Added:** 8.5.117.18]

- Conference the call (see Starting a Voice Conference).

> ## Important
> You might have to set a call result or disposition before you transfer or conference a call to another agent, for example to a back office worker. If you forget, an error message is displayed and you are prevented from transferring the call unless you set the call result. After this action, the Call Result and Record Information becomes read-only. [**Added:** 8.5.117.18]

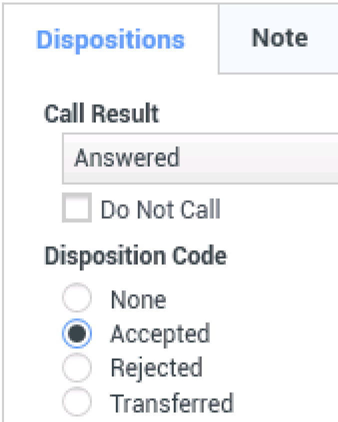
- Reschedule a call as a callback (see Lesson: Rescheduling a call as a callback).
  Note: For information about how to use the functionality in the interaction window, see the *Workspace 8.5 Help*.

7. When the interaction is complete, either you or the contact can end the call. If you want to terminate the call, click the `End Call` button.
8. If required by your configuration, specify a call result and/or a disposition code that qualifies the outcome of the interaction.
   a. Click the `Dispositions` tab to make it active.
   b. (Optional) In the `Call Result` drop-down list, select a call result (see the Outbound Campaign Interaction window Call Result drop-down list figure).



Outbound Campaign Interaction window Call Result drop-down list

   c. (Optional) Select an outcome from the `Disposition Code` drop-down list or radio-button list in the Disposition Code view (see the Outbound Campaign Interaction window Call Result and Disposition Code views figure and also Assigning Disposition Codes).



Outbound Campaign Interaction window
Call Result and Disposition Code views

d. (Optional) If the contact requests to be put on the Do Not Call list, select `Do Not Call` in the `Call Result` view (see the Outbound Campaign Interaction window Call Result and Disposition Code views figure).

9. Click `Mark Done`. This step might be performed for you automatically when you end the call or set a disposition code.
10. If the Voice Interaction window does not close automatically, close the Voice Interaction window after you have clicked `Mark Done` for each of the active interactions.
11. Complete your after-call work.
12. Set your status on the Voice channel to Ready to receive the next call.

End Next Steps

- Set your status to Ready. See Lesson: Going Ready in the Workspace Main window.

Lesson: Rescheduling a call as a callback

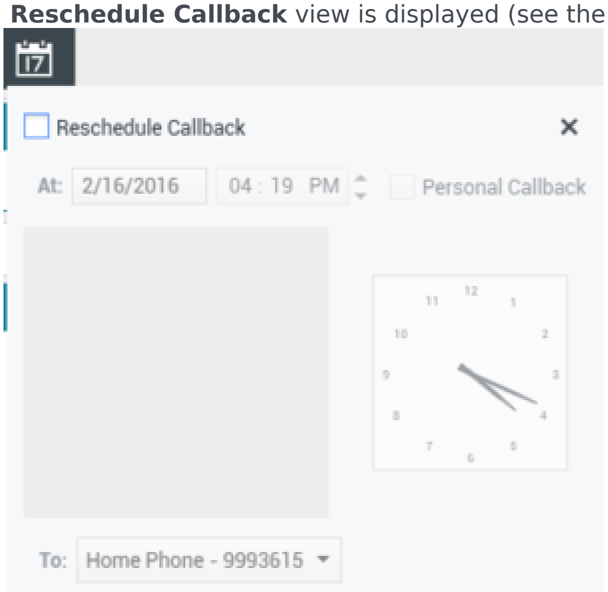
Purpose: To reschedule an Outbound-Campaign voice interaction for a different date and/or time and/or phone number.

> ### Tip
> Refer to the *Workspace 8.5 Help* for detailed information about all of the features of the Reschedule view.

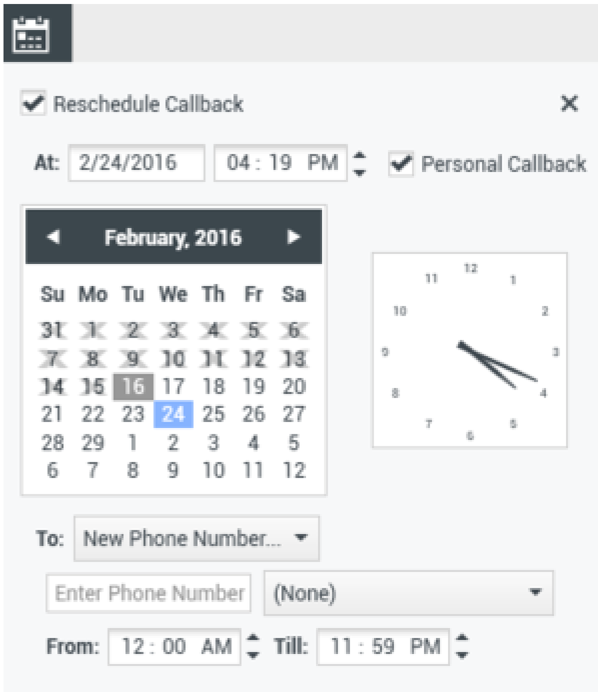
Prerequisites

- You have an active Outbound Campaign interaction that you want to reschedule for a different date and/or time.

Start

1. You can reschedule an Outbound-Campaign call (for example, if the contact is too busy to respond now) to a different date and/or time by using the Reschedule a Callback function. In the Outbound Campaign voice interaction window, in the call-action toolbar, click `Reschedule a Callback` (). The **Reschedule Callback** view is displayed (see the Reschedule Callback view figure).


Reschedule Callback view
2. Click the `Schedule Callback` check box to reschedule the call.
3. To set a new date, perform one of the following steps:
   - Enter a new date in the date field.
   - Click a new day in the calendar view. Use the left and right arrow buttons to change the month and year.
4. To set a new time, perform one of the following steps:
   - Enter a new time in the time field.
   - Click the up and down arrows to change the hours and minutes.
5. To reschedule the call from you personally, click `Personal Callback`. Leave the `Personal Callback` check box clear to send the interaction back to the calling queue. [**Modified:** 8.5.115.17]
   - In some environments, all rescheduled calls are personal callbacks. In this case, you will not be able to change the selection.
   - In some environments, all rescheduled calls are campaign callbacks (any active agent in the campaign can make the callback). In this case, the **Personal Callback** check box is not displayed.
6. To select a new number for the contact, click the Phone drop-down list and choose a different number.
7. To add a new number that is to be used for the callback call, click the To drop-down list and select `New phone number`. The New Phone Number view is displayed (see the New phone number controls in the Reschedule Callback view figure).



New phone number controls in the Reschedule Callback view

8. Enter a new number in the `Number` field.
9. Select a type of number from the Type drop-down list.
10. Specify a From time and an Until time in the respective `From` and `Till` time displays. These values constrain the time during which the new number is available to accept a callback.
11. After you have specified a new date and/or time and, if necessary, a new number, the `Reschedule Callback` button changes to the `Callback Scheduled` button (). Click `End Call` to disconnect the call.
12. Click `Mark Done` to reschedule the callback.

End

Related Information

- Outbound Campaign Overview help
- Outbound Preview Calls help
- Outbound Push Preview Calls help
- Outbound Progressive Calls help
- Call Actions for Outbound Calls help

Handle Internal Instant Messaging

In this lesson, you will learn how to use the Team Communicator feature to send an Instant Message (IM) to an internal target and receive an IM from an internal target. The Team Communicator enables you to find an internal target or a contact, send an Instant Message (IM) to an internal target, call a contact or an internal target, initiate a conference, or transfer a call. This lesson contains the following sections:

- Instant Messaging Overview
- Sending and Receiving Internal Instant Messages
- Sending and Receiving Consultation Instant Messages

Instant Messaging Overview

Instant Messaging is a type of real-time, text-based communication between two or more participants over a network. IM enables you to convey a text message immediately and receive an immediate text reply without the overhead and time delay that are associated with email and other text-based communication technologies. This feature enables you to send an IM to another agent (internal target) or receive an IM from an internal target. The Workspace IM view provides identification of all connected parties, as well as a timestamp for each message.

> **Warning**
> At this time, it is not possible to save the contents of an IM session or record notes in the Note view.

You can conduct an IM session from the following windows/views:

- Main Window (opens in an IM Interaction window)
- Voice Interaction (opens in the Voice Interaction window)
- Email Interaction (opens in the Email Interaction window)
- Chat Interaction (opens in the Chat Interaction window)
- Workitem Interaction (opens in the Workitem Interaction window)

Sending and Receiving Internal Instant Messages

Workspace Instant Messaging (IM) is carried by a SIP switch. To send and receive instant message, your contact center must have a SIP switch, and your role must include the IM task.

> **Important**
> Workspace supports only internal IM sessions.

This section contains the following procedures:

- Lesson: Initiating an Instant Messaging session
- Lesson: Receiving an Instant Messaging session

Lesson: Initiating an Instant Messaging session

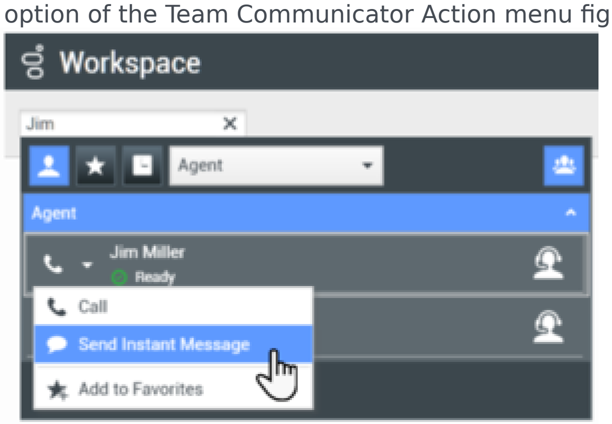
Purpose: To find an internal target (such as an agent, Routing Point, queue), and begin a text-based message-exchange session.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).

Start

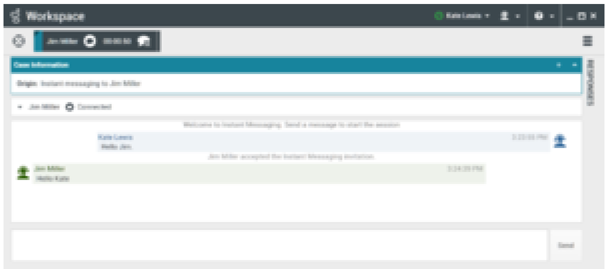
1. Use the Team Communicator in your Main Window view to find the internal target with whom you want to start an IM session (see Find A Contact Or An Internal Target).
2. Select `Send an Instant Message` from the `Action Menu` drop-down list next to the name of the internal target in the Team Communicator pop-up result-list (see the The Send an Instant Message option of the Team Communicator Action menu figure).



The Send an Instant Message option of the Team Communicator Action menu

The IM interaction window is displayed.

3. Enter a message to your target. The session starts in the Interaction window (see the An Instant Messaging session in the 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.



An Instant Messaging session in the Interaction window

4. 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.
5. Click Send or press the `Enter` key on your keyboard to send your message to the internal target. The text of your message is displayed in the `Transcript` field of your interaction window. Messages from you are identified by your login name and a color that is different from the one that is used to identify replies from the internal target. Replies from the internal target are displayed in the `Transcript` field along with your messages. Messages are displayed in the order in which they are sent and received. Each message is tagged with a timestamp (see the An Instant Messaging session in the Interaction window figure). The Interaction window displays the name of the party to whom you are connected and the status of the connection: `Establishing`, `Connected`, or `Ended`.
6. When your session is complete, click the `End IM` button to end the IM session. The internal target can also do this.
7. Click the `Done` button to close the Interaction window.

End

Lesson: Receiving an Instant Messaging session

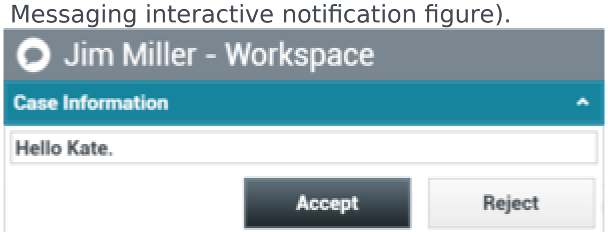
Purpose: To receive an invitation to a join a text-based message-exchange session with another agent.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).

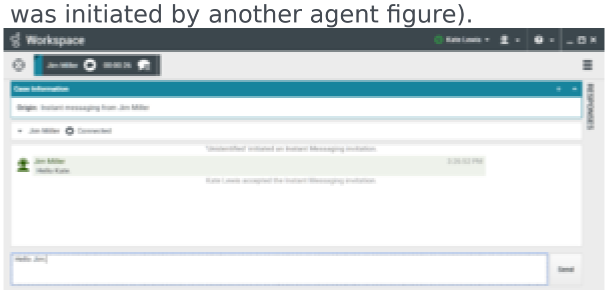
Start

1. If another agent selects you as an internal target for an IM session, an interactive notification is displayed that invites you to accept or reject the invitation to join the IM session (see the Instant Messaging interactive notification figure).



Instant Messaging interactive notification

> ## 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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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)

2. Do one of three things:
   - Click `Accept` to display the new IM interaction in your Interaction window.
   - Click `Reject` to refuse the IM interaction.
   - Allow the invitation to time-out. The interactive notification is dismissed.
3. If you clicked `Accept`, the session starts in your Interaction window. The tab that is displayed at the top of the Interaction window indicates the agent logon of the internal caller with whom you are in an IM session. The status of the connection: `Not Connected`, `Connected`, or Ended, is displayed near the top of the Interaction window. The large text field contains a transcript of the IM session. Your logon and the logon of the internal caller are displayed above your messages in different colors to help you to identify who is writing. Each entry is marked with a timestamp. Messages are displayed in the order in which they are sent and received (see the Interaction window displaying an Instant Messaging session that was initiated by another agent figure).

Interaction window displaying an Instant Messaging session that was initiated by another agent
4. Reply to the calling agent by entering your message in the field that is displayed next to the Send button.
5. Click Send or press the `Enter` key on your keyboard to send your message to the internal caller.
6. When your session is complete, click the End `IM` button to end the IM session. The caller might also do this.
7. Click the `Done` button to close the Interaction window.

End

Sending and Receiving Consultation Instant Messages

Workspace Instant Messaging (IM) enables you to start an IM Consultation from an active interaction, such as voice, email, or chat.

Important

Workspace supports only internal IM sessions.

This section contains the following procedures:

- Lesson: Starting a Consultation IM session from an active interaction
- Lesson: Receiving a Consultation IM session from an active interaction and transitioning to a Voice Consultation

Lesson: Starting a Consultation IM session from an active interaction

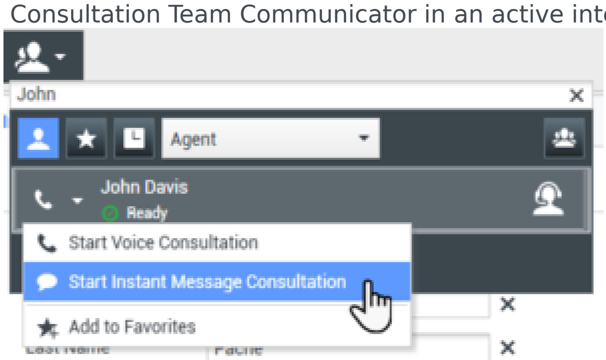
Purpose: To start a Consultation IM session from an active interaction.

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, Receiving and Handling an Inbound Email Interaction, or Receiving and Handling an Inbound Chat Interaction).

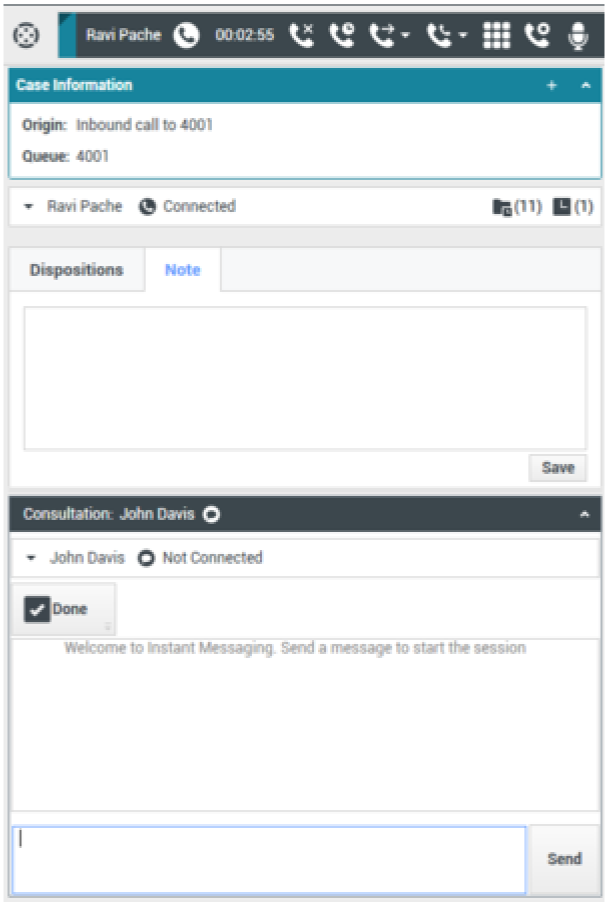
Start

1. On your active Interaction view, click `Start Consultation` to open the Team Communicator (see the Start Consultation Team Communicator in an active interaction figure) to find the internal target with whom you want to start an IM session.
2. Enter the name, email address, or phone number of the internal target (see the Start Consultation Team Communicator in an active interaction figure).
3. From the internal target `Action` menu, select `Start Instant Message Consultation` (see the Start Consultation Team Communicator in an active interaction figure).



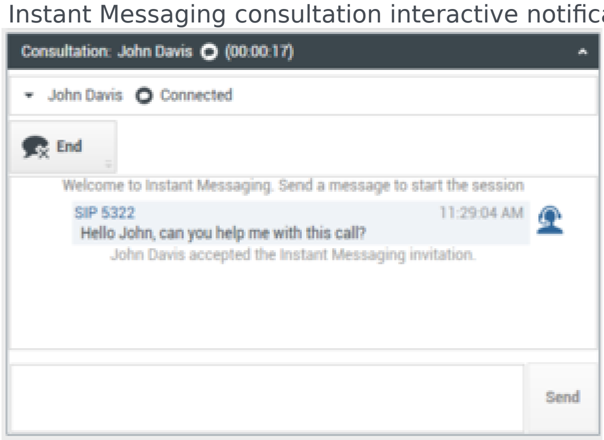
Start Consultation Team Communicator in an active interaction

4. A new Internal IM message view is displayed in the active interaction view. The status is `Not Connected` (see the Internal IM message view in an active interaction window figure).
   - To initiate an Internal IM session, enter a message and click Send.
   - To cancel the IM session, click the Done button.



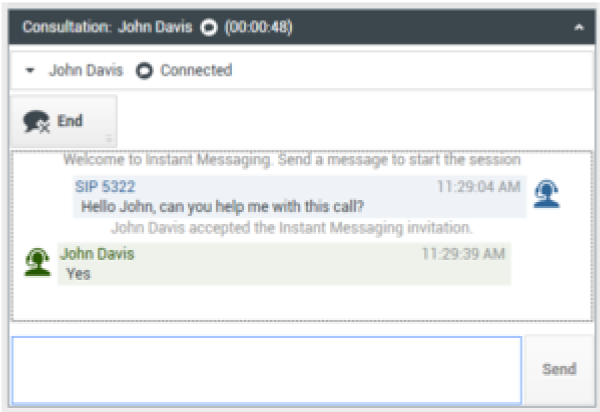
Internal IM message view in an active interaction window

5. If you sent a message (see the Initial message sent to IM Consultation target figure), the internal target receives an interactive notification of your instant message that includes your initial message (see the Instant Messaging consultation interactive notification figure).



Initial message sent to IM Consultation target

6. If the internal target accepts your invitation, you and the target are engaged in an internal IM session (see the Active IM Consultation session in an active interaction window figure).



Active IM Consultation session in an active interaction window

All the Case Information about the interaction with the contact is displayed in the IM interaction window of your internal target (see the Interaction window displaying an Instant Messaging session that was initiated by another agent figure). The Contact Information and Contact History tabs enable your internal target to view information about your contact and to search the contact history database. The Information tab is read-only. You can do the following in the Consultation IM interaction window:

- Enter messages in the message field.
- Click Send to send the message to the internal target.
- Review the message transcript in the message transcript area.
- Click End session to terminate your IM Consultation.

End

Lesson: Receiving a Consultation IM session from an active interaction and transitioning to a Voice Consultation

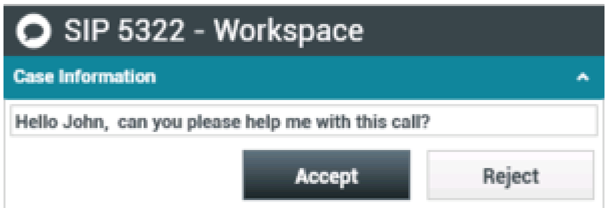
Purpose: To handle an IM consultation request and handle a request to transition to a Voice Consultation.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- Your status is Ready for the voice-media channel (see Lesson: Going Ready in the Workspace Main window).
- You are the internal target for the IM consultation interaction.

Start

1. If another agent, who is handling an interaction, selects you as an internal target for an IM consultation session, an interactive notification is displayed that invites you to accept or reject the invitation to join the IM consultation session (see the Instant Messaging consultation interactive notification figure). The notification displays the invitation message from the agent and the case information for the interaction that the agent is handling.

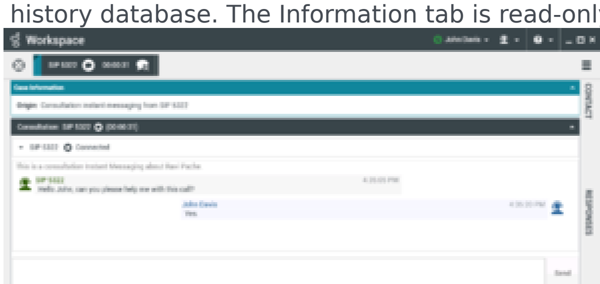


Instant Messaging consultation interactive notification

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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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)

2. Do one of three things:
   - Click `Accept` to display the new IM interaction in your Interaction window.
   - Click `Reject` to refuse the IM interaction.
   - Allow the invitation to time-out. The interactive notification is dismissed.
3. If you clicked `Accept`, the session starts in your Interaction window. The tab that is displayed at the top of the Interaction window indicates the agent logon of the internal caller with whom you are in an IM session. The status of the connection: `Not Connected`, `Connected`, or Ended, is displayed near the top of the Interaction window. The large text field contains a transcript of the IM session. Your logon and the logon of the internal caller are displayed above your messages in different colors to help you to identify who is writing. Each entry is marked with a timestamp. Messages are displayed in the order in which they are sent and received (see the Interaction window displaying an Instant Messaging session that was initiated by another agent figure). All the Case Information about the interaction with the contact is displayed in the IM interaction window of your internal target (see the Interaction window displaying an Instant Messaging session that was initiated by another agent figure). The Contact Information and Contact History tabs enable you to view information about the contact and to search the contact history database. The Information tab is read-only.



Interaction window displaying an Instant Messaging session that was initiated by another agent

4. Reply to the calling agent by entering your message in the field that is displayed next to the Send button (see the Interaction window displaying an Instant Messaging session that was initiated by another agent figure). The IM consultation session can be transitioned to a Voice consultation (see Blending Internal Voice Interactions and Internal IM Interactions).
5. Click Send or press the `Enter` key on your keyboard to send your message to the internal caller (see the Interaction window displaying an Instant Messaging session that was initiated by another agent figure).

6. When your session is complete, click the `End IM` button to end the IM session. The caller might also do this (see the **Interaction window displaying an Instant Messaging session that was initiated by another agent** figure above).
7. Click the `Done` button to close the Interaction window.

End

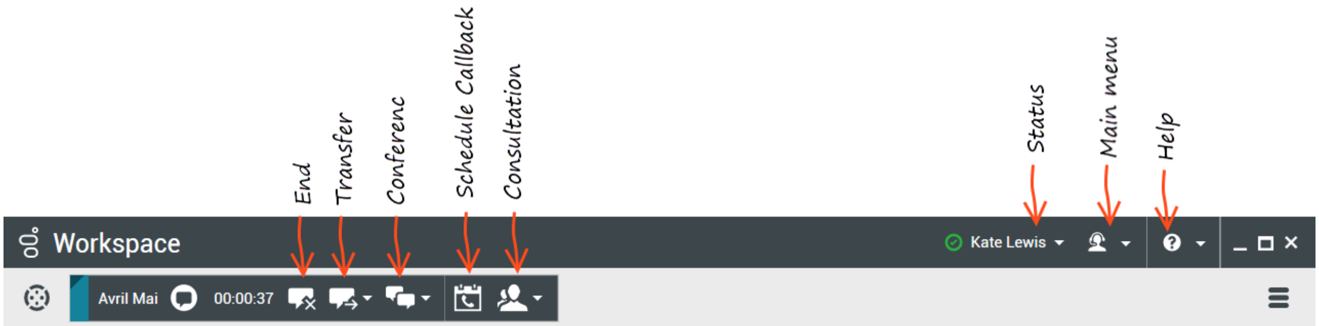
Related Information

- Internal Instant Message (IM) help

Handle A Chat Interaction

[**Modified:** 8.5.115.17, 8.5.113.11, 8.5.128.07, 8.5.142.05]

In this lesson, you will learn how to handle inbound chat interactions, and how to check the spelling of your chat messages before you send them.



> ## Tip
> If your chat interaction includes the **Altocloud** tab on the right side, you can learn about Altocloud interactions and journeys here.

This lesson contains the following sections:

- Receiving and Handling an Inbound Chat Interaction
- Spelling Check
- Handling a chat interaction that includes chat bot Rich Media
- How do I continue a chat interaction?

> ## Tip
> **Why is the Chat Interaction bar flashing?** 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. [**Added:** 8.5.113.11]
>
> 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]

Receiving and Handling an Inbound Chat Interaction

If you are the selected internal target for an inbound chat interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it, the Chat Interaction window is displayed. The Chat Interaction window contains information about the interaction and the controls that you need to complete the interaction.

Lesson: Handling an inbound chat interaction

[**Modified:** 8.5.115.17, 8.5.121.03]

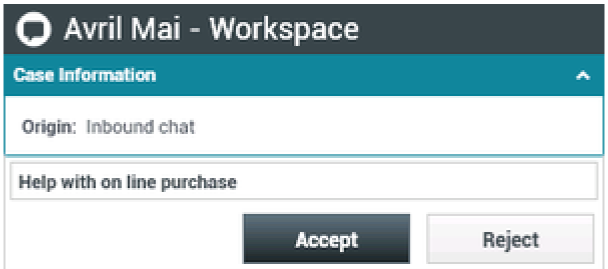
Purpose: To handle an inbound chat interaction properly.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- Your status is Ready for the chat-media channel (see Lession: Going Ready in the Workspace Main window).
- You are the internal target for the inbound interaction.

Start

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Chat Interaction interactive notification figure).



Chat Interaction interactive notification

The Interaction Preview contains a summary of information that pertains to the interaction, including contact information and interaction-type. The Interaction Preview might also contain Case Information, which is part of the case data about the interaction.

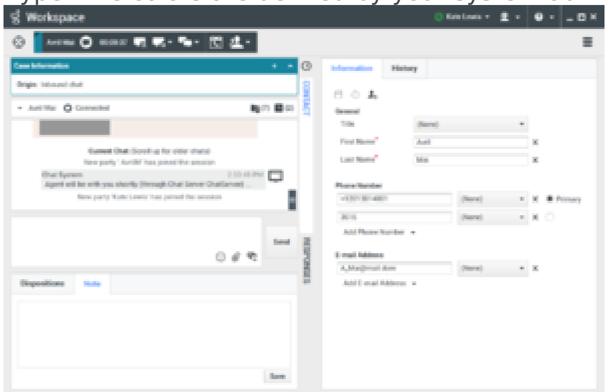
Tip

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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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)

If your account is configured for auto-answer, the Interaction Preview is not displayed and the chat is answered automatically unless your account is configured to enable you to preview the case information before the interaction is auto-answered. In this case, when you receive an auto-answer interaction, the Interaction Preview is displayed on your desktop. A timer that counts down the number of seconds until you are connected to the contact is displayed in the **Accept** button (refer to the following figure). You can click **Accept** before the timer runs out or wait for the timer to run out. The **Reject** button might also be displayed if your administrator wants you to have the option of rejecting an interaction before it is auto-answered.[**Added:** 8.5.105.12]

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to display the interaction.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will time-out and be redirected.
3. If you accept the interaction, the inbound Chat Interaction window is displayed (see the Chat Interaction window figure). The Inbound Chat Interaction window provides the following functionality:
   - Read messages from the contact in the transcript area of the Chat Interaction window.
   - Compose a message/response.
   - Check the spelling of your message/response (see Lesson: Using Spelling Check to find potentially misspelled words in a chat message).
   - Send a message/response.
   - Select, verify, and send a URL (see the *Workspace 8.5 Help*).

   The message-transcript area of the Chat Interaction window contains color-coded, time-stamped message lines from your company's system, as well as the messages that are sent by the contact and your replies (see the Chat Interaction window figure). A different color is designated for each message type. The colors are defined by your system administrator.



Chat Interaction window

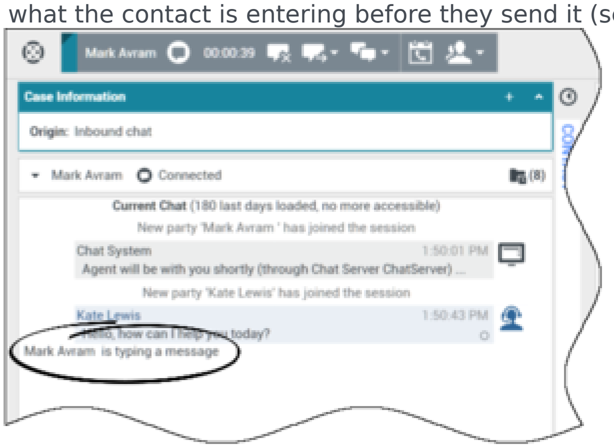
Tip

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 see the address.

4. To begin interacting with your contact, enter a message in the message area, and then click **Send**. Your message is displayed to the contact in the chat interface that the contact is using to communicate with you. Your message is also added to the transcript area of the Chat Interaction window. You might see a small circle in the bottom right of your message in the transcript. When the circle disappears, you know that your message has been read by the contact.

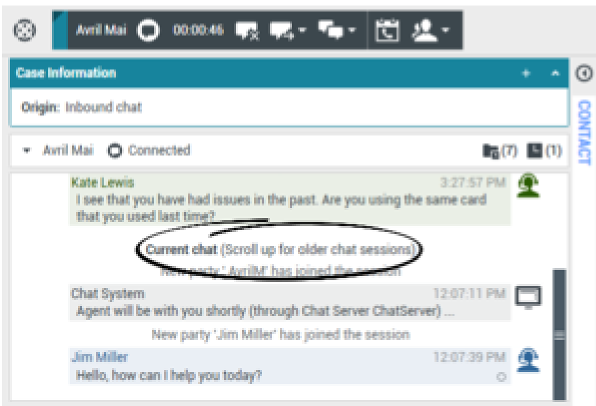
Your system administrator configures how your name appears to your contacts. It might be your real name, your user name, or a nickname.

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 let you see what the contact is entering before they send it (see the following figure). [**Modified:** 8.5.108.11]

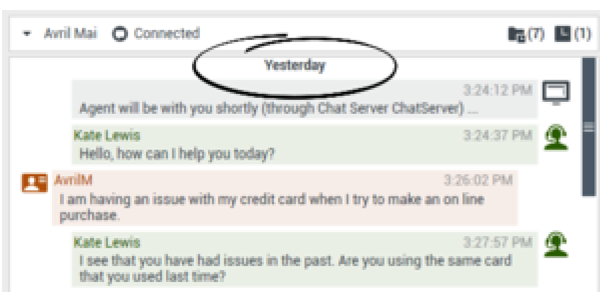


Your system might be set up to let you see what a contact is typing before they send it to you

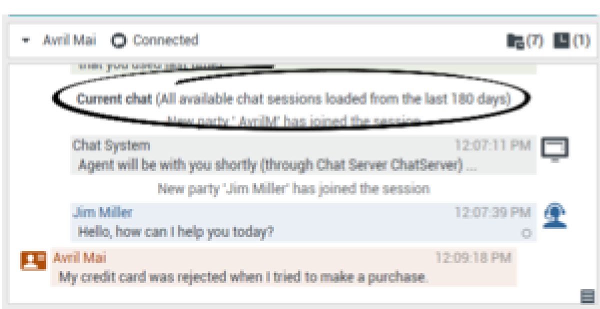
Be careful not to respond to what the contact is typing before they have sent it to you!
Sometimes while you are chatting with a contact, you want to view earlier chat interactions with the contact, particularly if you are working on an ongoing issue with the contact. For example, sometimes a contact 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 view of the interaction window; see: Lesson: Finding and viewing an interaction in the contact 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 you will see text above the current chat session indicating where the current chat begins and a message informing you that to see 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. [**Added:** 8.5.122.08]



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.



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

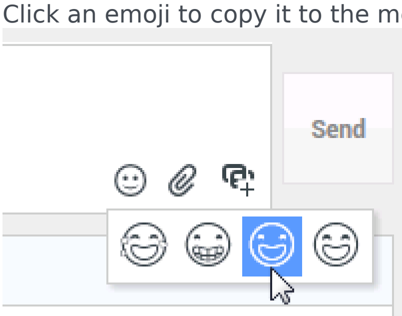


5. Your account might be set up to let you send emojis (emoticons or 'smileys') to your contact as part of the text of a chat interaction. Emojis are little faces and other symbols that you can use to let your contact know how you are feeling or to help them to know when something is good, funny, bad,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

Ask your supervisor or administrator about when to use emojis. To send an emoji do the following:

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

b. Click an emoji to copy it to the message composition area.

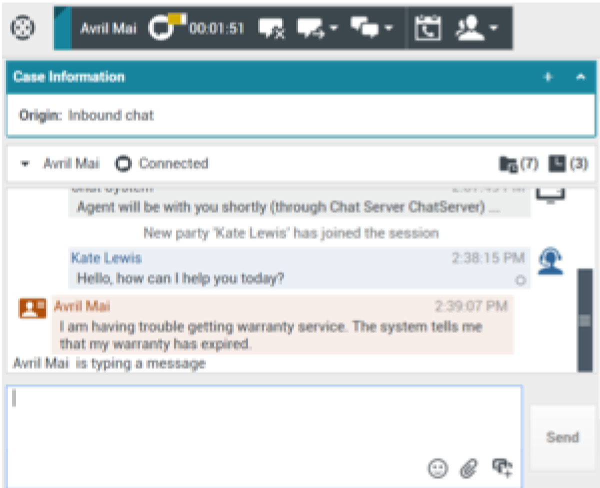


c. Click **Send**.

[**Added:** 8.5.115.17]

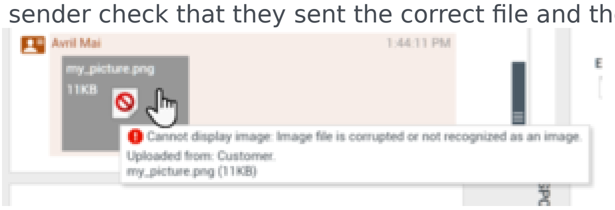
6. Messages that are sent by your contact are displayed together with your messages in the message transcript area (see the Chat Interaction window progress bar and message area figure). When you receive a message from the contact, a small progress bar is displayed near the top of the Chat Interaction window, on the Chat icon. The progress bar expands from left to right. It begins as green, changes to yellow, and finally changes to red, to indicate that a response is expected from you. See the *Workspace 8.5 Help* for more information about the behavior of the Chat Interaction window.
While you are interacting with your contact, you can use the following functionality in the Chat Interaction window:

- Use the Note to attach a note to the interaction history. See Managing Contact History.
- View and edit Case Information for the current interaction.
  - Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.
- View and manage contact history. See Managing Contact History.
- View and manage contact information. See Lesson: Finding and viewing an interaction in the contact database.
- 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.
- View the Standard Response Library if you decide to call the sender instead of replying to the email. See Inserting a Standard Response into an Email Interaction
- Call the sender by clicking the `Action` menu drop-down list that is displayed next to the contact name.



Chat Interaction window progress bar and message area

7. 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. If there is a problem with the transferred file, you will see the following icon and tooltip. You might have to request that the sender check that they sent the correct file and then ask him or her to resend it.



You might be allowed to save file attachments to your workstation or network:

- Click the save button on the thumbnail/icon, or,
- Right-click to open the file attachment action menu and select **Save As**. If more than one file has been transferred, you can choose **Save All** to save all the files, including the files that you transferred.

You might be allowed to open file attachments in the appropriate application, for example: Paint.

- Double-click the thumbnail/icon to open the file in the default application, or,
- Right-click to open the file attachment action menu and select **Open**.

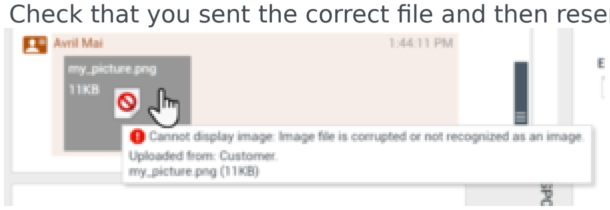
[**Added:** 8.5.115.17]

8. 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: From your workstation or network, and from the Responses tab.
   - To attach a file to a chat from your workstation or network, perform the following steps:
     a. In the chat text composition field, Click **Add Attachments**.

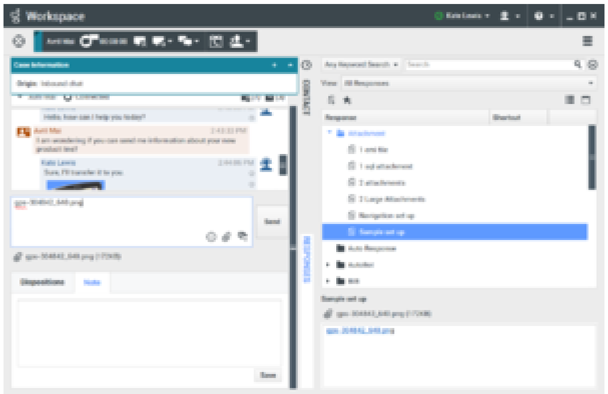
        Note: You can also drag and drop a file to the message composition area.

     b. In the Open window, navigate to the file that you want to attach and select the file.
     c. Click **Open**. The file name appears below the chat text composition field with a paperclip icon next to it. You can click the file name to open a menu that lets you open and save the attachment.
     d. Click **Send** to transfer the file to your contact. The file appears as a thumbnail or as an icon that corresponds to the file type in the chat transcript, and is sent to your contact.

        Note: If there is a problem with the transferred file, you will see the following icon and tooltip. Check that you sent the correct file and then resend it.



   - To attach a file to a chat from a standard response, perform the following steps:
     a. Open the Responses tab and navigate to the file that you want to transfer.

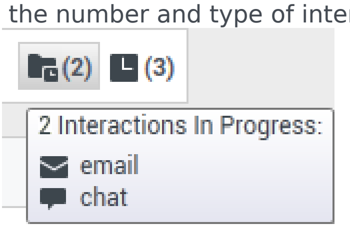


b. Double-click a response that contains an attachment or click **Insert Standard Response Text** to add the file as an attachment.
Before or after you transfer the file, you might have the ability to open, save, save all, delete (remove from the list of files to send), delete all, or print the file. Click the file name to display the drop-down menu.

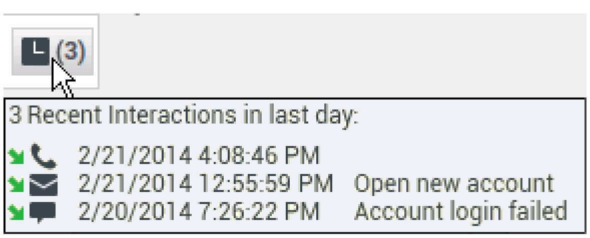
c. Click **Send** to transfer the file.

[**Added:** 8.5.115.17]

9. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see the Dynamic Contact History Matrix, displaying the number and type of interactions in progress figure). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.



You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Recent interactions matrix displaying the list of interactions with the current contact within the last day figure). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



10. If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:

- Instant Transfer the chat to another internal target. See Transferring a Chat Interaction.
- Start a consultation with another party:
- Start an Instant Messaging consultation. See Lesson: Initiating an Instant Messaging session.
- Start a Voice consultation. See Starting a Voice Conference.

- Start a Chat Consultation. See Starting or Receiving a Chat Consultation.

11. When you are finished interacting with your contact, click `End Chat` to stop the current chat interaction. After you or the contact has ended the chat session, you can perform the following functions:
    - Select `Mark Done` for the current interaction. The transcript is saved in the contact history and the Chat Interaction window is closed.
    - Set a disposition code. See Assigning Disposition Codes.

End

Spelling Check

You might be enabled to use the Spelling Check functionality. The Chat Interaction window has automatic spelling-check capabilities that enable you to correct misspelled words or add words to your personal dictionary.

Lesson: Using Spelling Check to find potentially misspelled words in a chat message

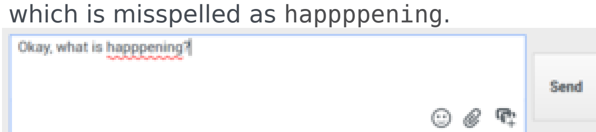
Purpose: To verify the spelling of the content of an outbound chat message.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have an active Chat interaction (see Receiving and Handling an Inbound Chat Interaction).

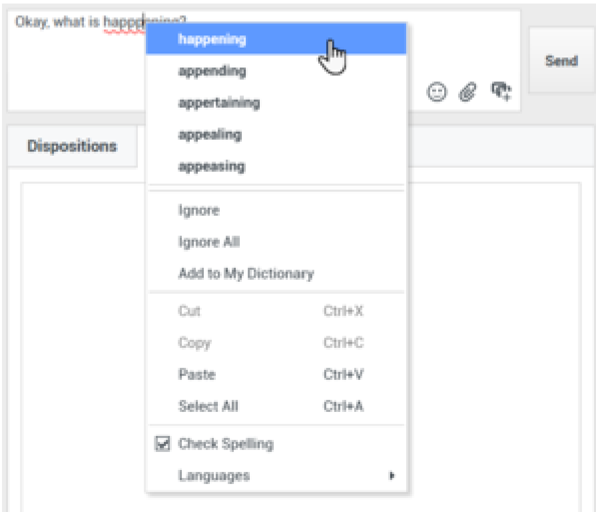
Start

1. Begin entering text in the message area of a Chat Interaction window (see Lesson: Handling an inbound chat interaction). You can enter text by typing at the insertion point, pasting content from another document, or inserting a standard response (Lesson: Using The Standard Response Library).
2. When Spelling Check is on, words in the message area that are not in the specified dictionary are underlined by a red, wavy line. The Chat message composition area, displaying a misspelled word that is underlined in red figure shows a chat message that contains a word that is not in the `English (United States)` dictionary (the default dictionary for this user). The misspelled word is `happening`, which is misspelled as `happppening`.



Chat message composition area, displaying a misspelled word that is underlined in red

3. You can correct the spelling by using one of two methods:
    - Edit the word(s) manually.
    - Right-click the word to display the `Spelling Check` menu.



Chat Interaction window Spelling Check menu

4. If you right-clicked the misspelled word to display the `Spelling Check` menu, you can do one of the following:
   - Select the correct spelling from the list of suggestion (bold text).
   - `Ignore`--Select to ignore this instance of the word that is not in the specified language dictionary.
   - `Ignore All`--Select to ignore all instances of the word that is not in the specified language dictionary for this interaction only.
   - `Add to My Dictionary`--Select to add the spelling to your personal dictionary (not your corporate dictionary).
   - `Spell Checking`--Select to turn the Spelling Check functionality off or on.
   - Languages--Select to open the list of available language dictionaries. You can select a different language dictionary.
5. If you try to send a message that contains misspelled world, 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]

End

Handling a Chat interaction that includes chat bot Rich Media

[**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.

Lesson: Handling a chat interaction that includes chat bot rich media

Purpose: To take over a conversation with a contact from a chat bot.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).

Start

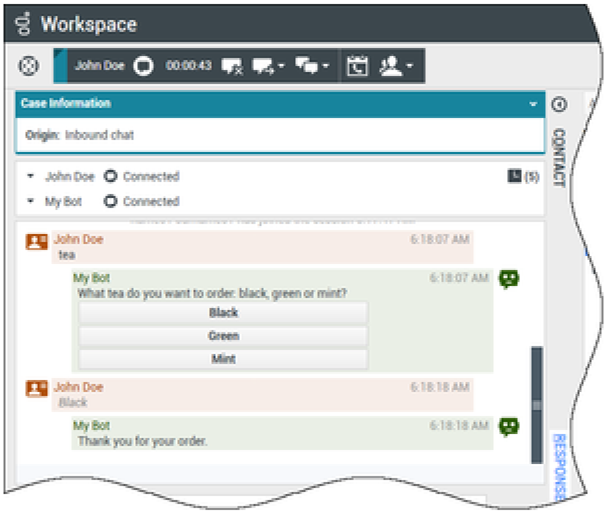
1. A chat interaction is directed to you from your organization's system. The chat transcript contains one or more messages exchanged between the contact and a chat bot. The transcript might include one of the following Rich Media types:
   - Quick Replies
   - Offer templates
   - Lists
   - Markdown templates

   Rich Media might also be available for you to review in the **Responses** tab.
2. Review the transcript. If the contact made a selection, such as one of the Quick Reply choices or one of the offers in a contact action Offer template, the selection is displayed to you below the Rich Media. You cannot interact with the Rich Media or make selections yourself. 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.
3. Continue to interaction with the contact according to the practices and requirements of your organization.

End

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 thumbnail to see an example of what a quick reply might look like.



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

Contact actions

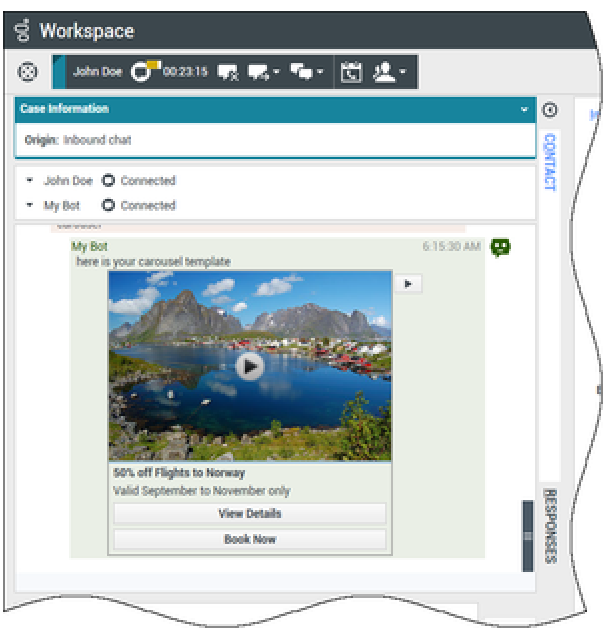
Chat bots can display descriptive text, pictures, videos, selection lists, and selection buttons, such as **Buy now**, to contacts. If your company uses offer/information templates to enable contact actions, such as clicking a button or selecting an item from a list, the chat transcript will contain 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 thumbnail to see an example of what an offer/information template might look like and how a contact action is displayed.

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

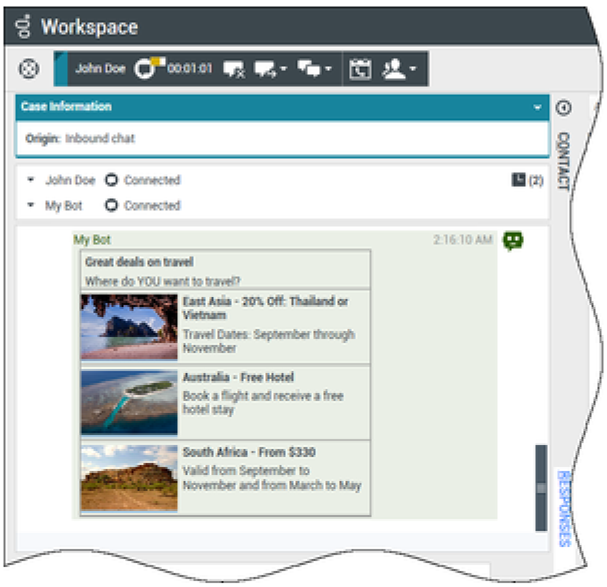
If a carousel offer template was displayed to the contact, you will see forward and backward navigation buttons next to the templates that enable you to page back and forth through the displayed templates. This is called a carousel template because clicking the navigation buttons simulates flipping through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



In this example, the contact navigates through the carousel until they see an offer of interest. The buttons below the video of Norway enable 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 thumbnail to see an example of a list of items presented to a contact.



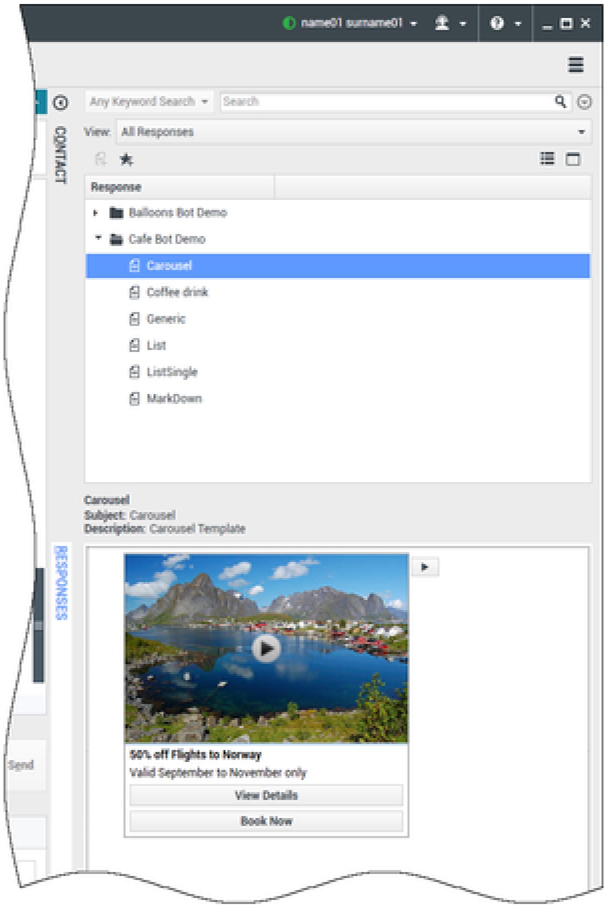
Markdown templates

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

This example shows 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 thumbnail to see an example of a carousel template in the **Responses** tab.



How do I continue a chat interaction?

- 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**. Here's how it works if it is available in your environment:
  Link to video

Related Information

- Chat Interaction help

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

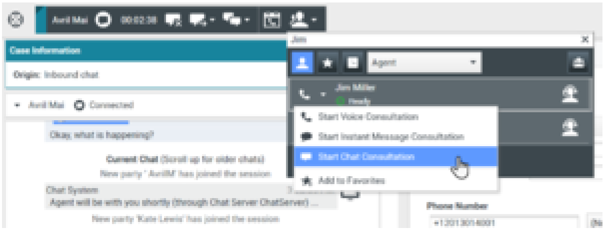
Purpose: To find an internal target (such as an agent, agent group, skill, interaction queue, or routing point), and then start and complete a chat consultation with the internal target, without the current contact seeing the messages that you exchange with the internal target.

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).

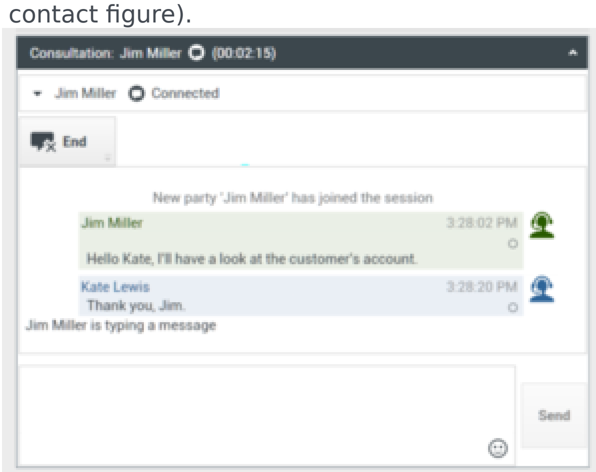
Start

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

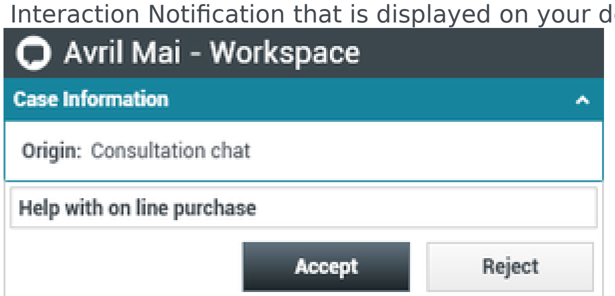
Lesson: Receiving a chat consultation request

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

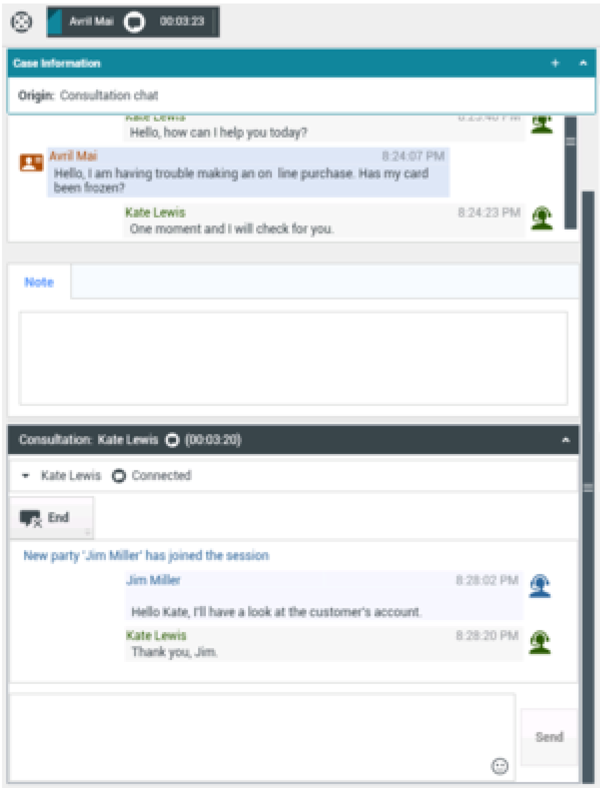
1. If another agent wants to consult with you about a chat interaction, they will initiate a chat consultation. You are notified of the consultation request by the Workspace Interaction Preview (see the Consultation Interaction Notification that is displayed on your desktop figure).


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 consider 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

Transfer A Chat Interaction

In this lesson, you will learn how to transfer chat interactions to an internal target. This lesson contains the following section:

- Transferring a Chat Interaction
- Starting a Chat Transfer to an Active Consultation

Transferring a Chat Interaction

The Workspace Chat Interaction window enables you to transfer your current chat interaction to another party. In this section, you will learn how to use the Team Communicator feature to transfer a chat interaction to an internal target. The Team Communicator enables you to find an internal target or a contact, send an Instant Message (IM) to an internal target, call a contact or an internal target, initiate a chat conference, or transfer chat interaction. This section contains the following procedure:

- Lesson: Starting an instant chat transfer
- Lesson: Receiving a transferred chat
- Lesson: Starting a chat transfer to an active consultation

Lesson: Starting an instant chat transfer

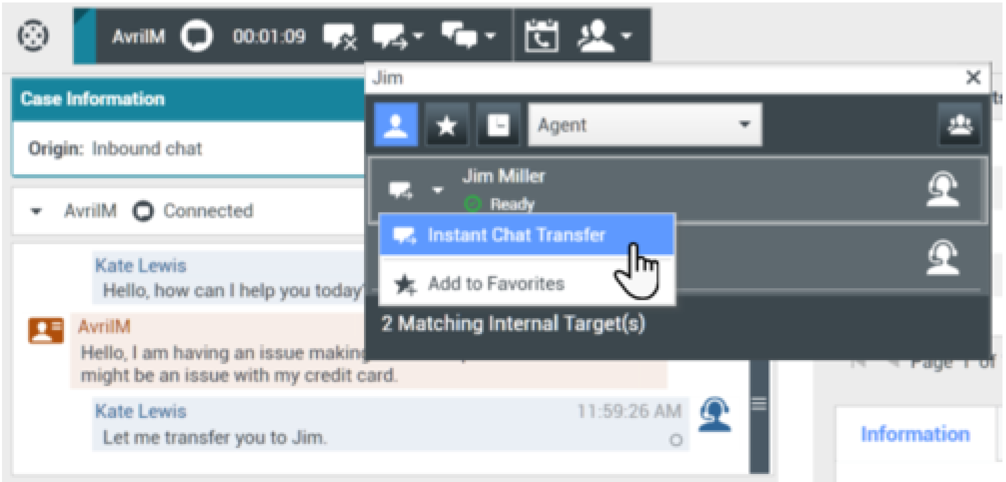
Purpose: To find an internal target (such as an agent, Routing Point, or queue), and then transfer the chat to the internal target.

Prerequisites

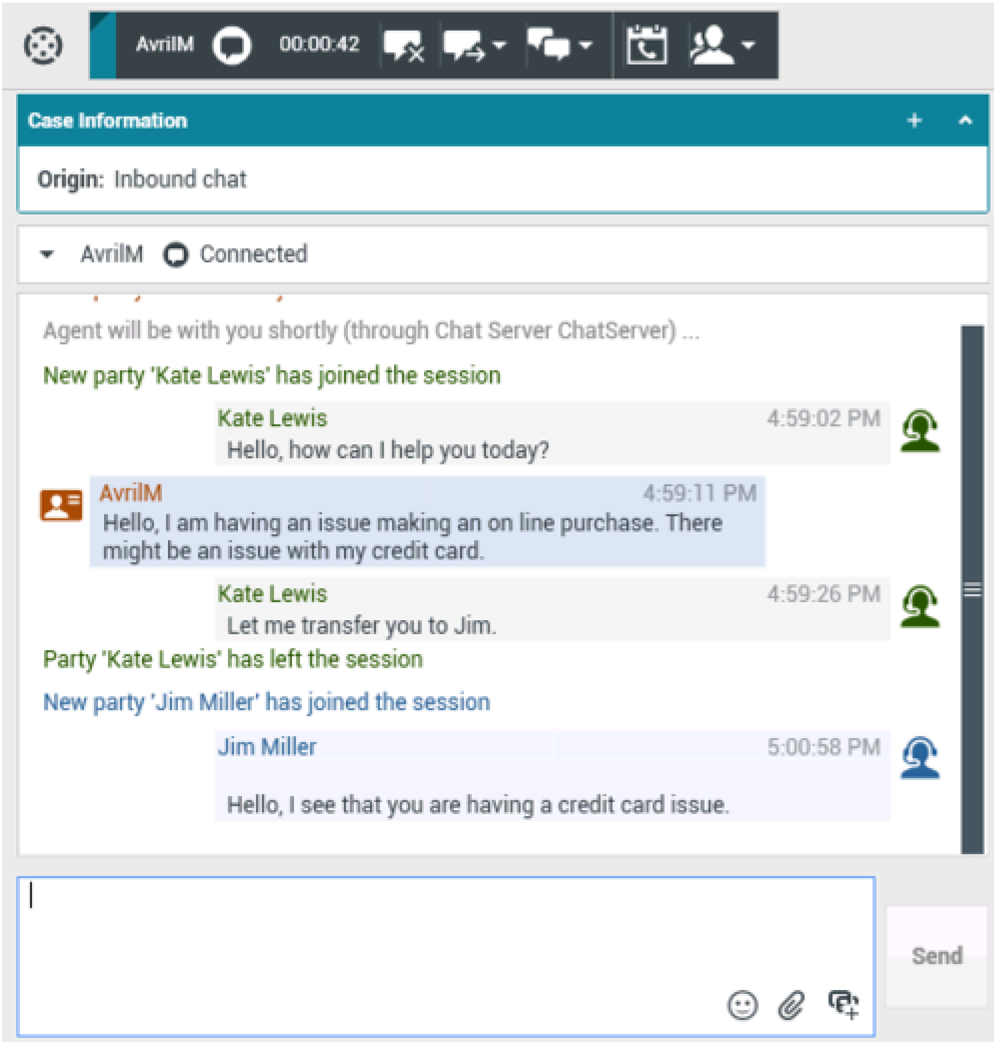
- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have an active interaction with a contact (see Lesson: Handling an inbound chat interaction).

Start

1. In the active Chat Interaction window, click `Transfer` to open the Team Communicator (see the Finding an internal target for a chat transfer in the active Chat 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).



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 Instant Chat Transfer. An invitation is sent to the target to accept the chat 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 Chat Interaction window displayed on the desktop to the transfer target figure).



If the target does not accept the interaction transfer request, the Chat 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 chat

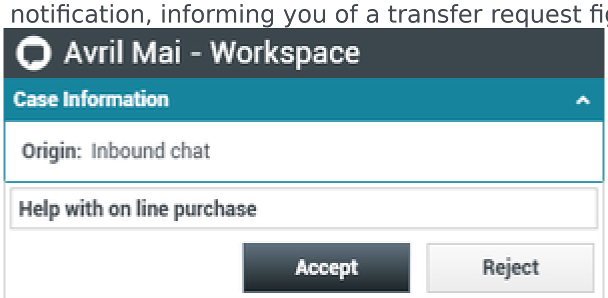
Purpose: To receive a transferred chat interaction from another agent.

Prerequisites

- You are logged in to Workspace (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 transfer a chat interaction to you, they can choose between an instant transfer and a transfer from a consultation. 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).

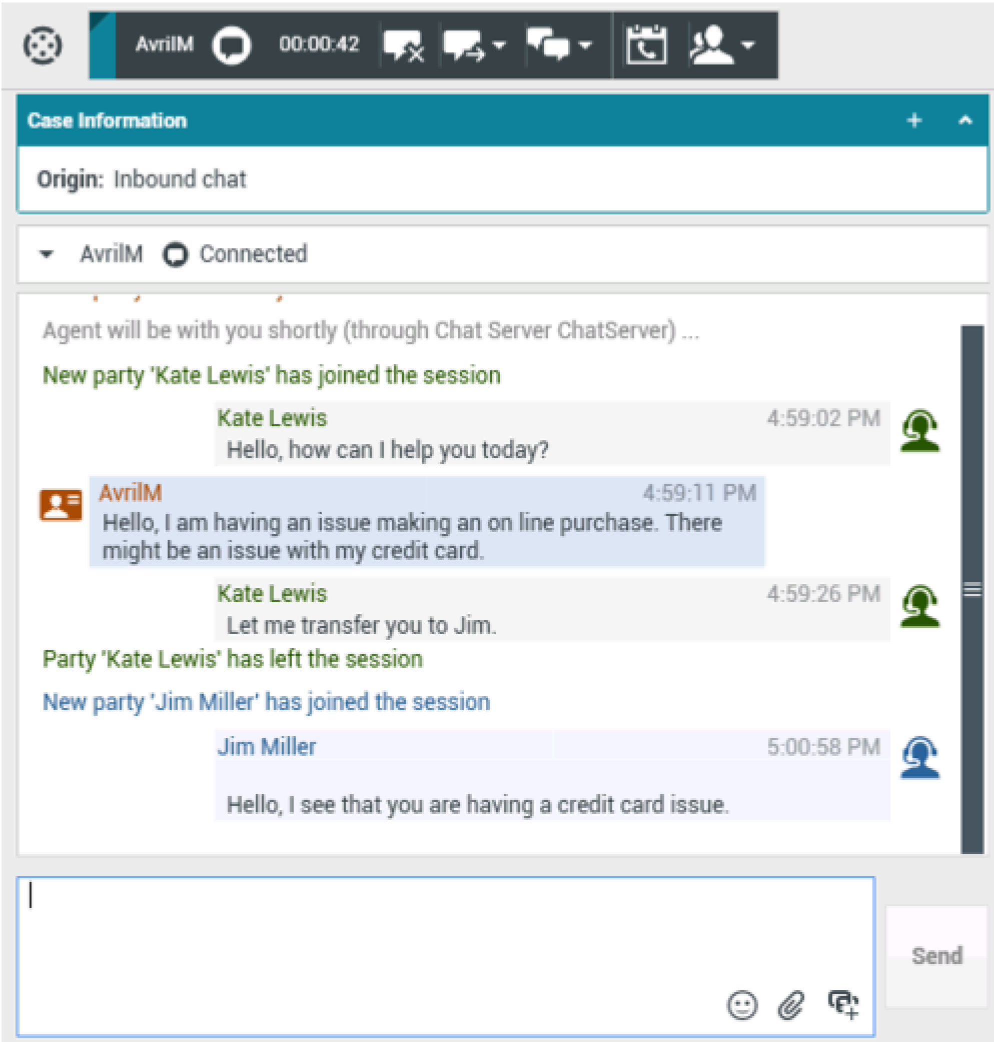


Interaction Preview interactive notification, informing you of a transfer request

> ## 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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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 or to consult first with the calling agent:

- If the calling agent initiated an instant transfer, the call is immediately transferred to you. Go to Step 3 of the Lesson: Handling an inbound chat interaction.
- If the calling agent initiated a consultation transfer, the Workspace Chat Interaction window is displayed. It shows your status as connected to the calling agent.



2. You are now the owner of the chat interaction. Refer to Step 3 of Lesson: Handling an inbound chat interaction, for information about handling a chat interaction.

End

Starting a Chat Transfer to an Active Consultation

The following procedure demonstrates how to transfer a chat interaction to a party with whom you are in a chat consultation; however, it is also possible to transfer from other types of consultations, such as voice, by following the same steps that are presented in the procedure.

Lesson: Starting a chat transfer to an active consultation

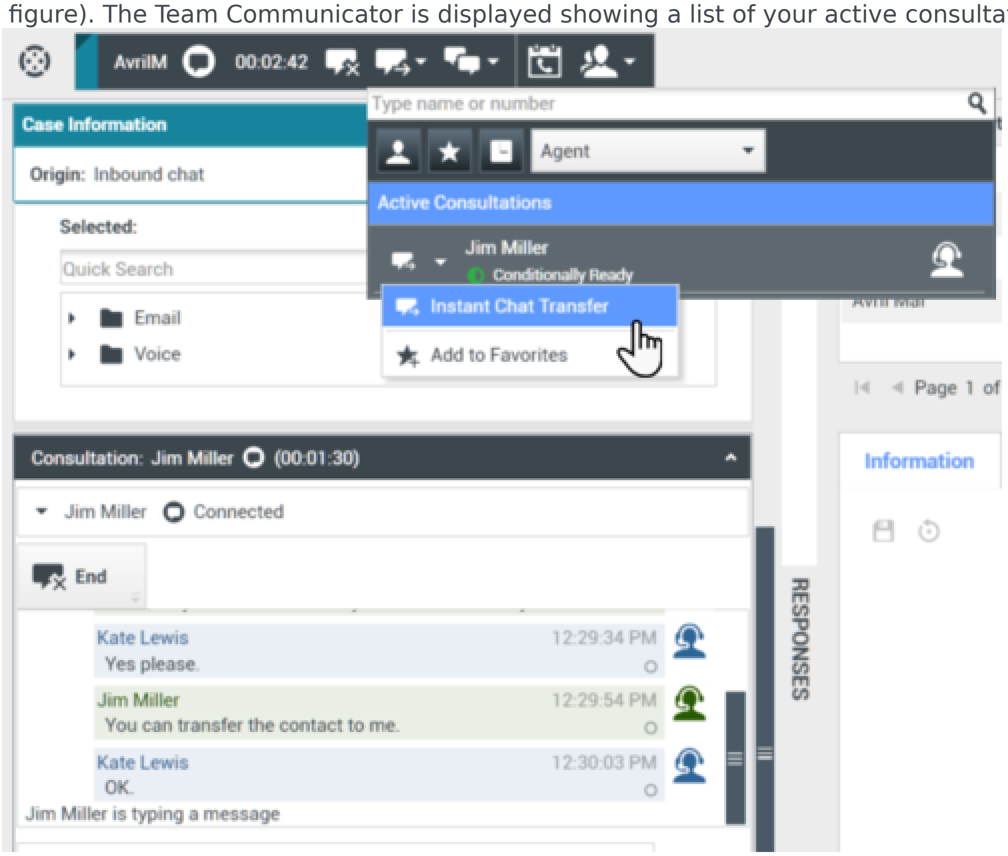
Purpose: To transfer the chat to an internal target with whom you are currently engaged in an active consultation.

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).
- You have an active consultation with an internal target (see Lesson: Starting a chat consultation).

Start

1. In the active Chat Interaction window, click `Instant Chat Transfer` to open the Team Communicator (see the Team communicator displaying current consultation party as default for Instant Transfer figure). The Team Communicator is displayed showing a list of your active consultations.



2. Complete the transfer by clicking the `Instant Chat Transfer` button that is beside the name of the target to whom you want to transfer the interaction. The interaction is transferred to the target. The interaction window closes.

End

Related Information

- Chat Interaction help

Conference A Chat Interaction

In this lesson, you will learn how to transfer chat interactions. This lesson contains the following sections:

- Starting a Chat Conference
- Starting a Chat Conference with an Active Consultation

Starting a Chat Conference

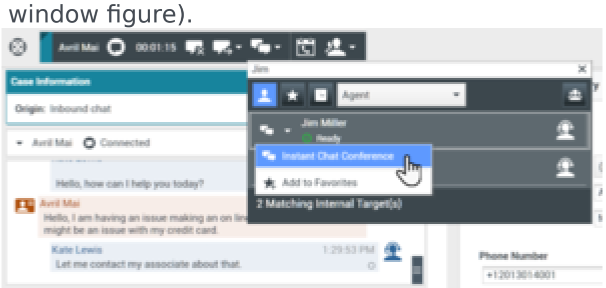
The Workspace Chat Interaction window enables you to instant-conference your current chat interaction with an internal target. In an instant conference, the conference starts as soon as the other party accepts the interaction. This section contains the following procedure:

- Lesson: Starting an instant chat conference
- Lesson: Receiving a chat conference
- Lesson: Starting a chat conference with an active consultation

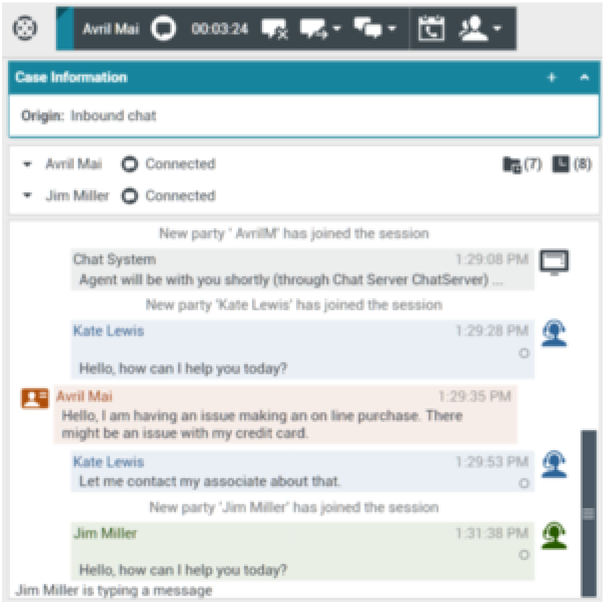
Lesson: Starting an instant chat conference

Purpose: To find an internal target (such as an agent, Routing Point, or queue), and then start and complete a chat conference with the internal target and the current contact.

Start

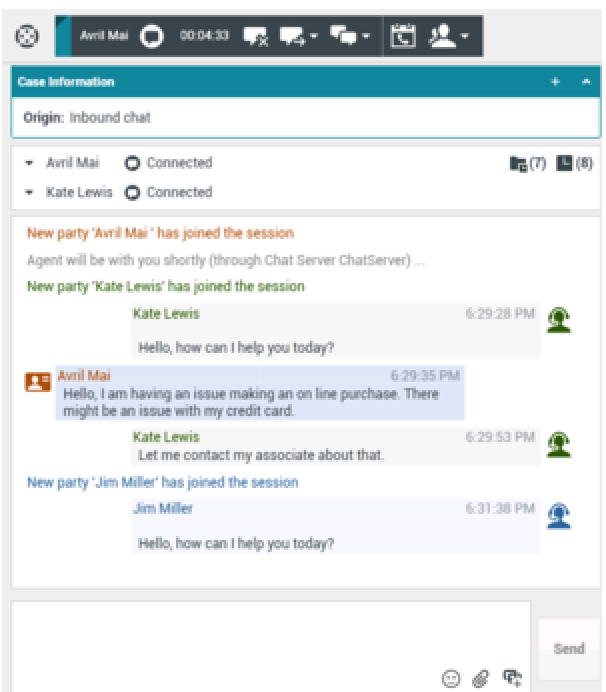
1. In the active Chat Interaction window, click the `Instant Conference` button to open the Team Communicator (see the Finding an internal target for a chat conference in the active Chat Interaction window figure).


Finding an internal target for a chat conference 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 conference, and then select `Instant Chat Conference`. When the internal target accepts the interaction request, a Chat Interaction window opens on the desktop of the conference target. The Chat Interaction window displays the entire transcript of the chat session between you and the contact (see the Chat Interaction window on the desktop of your conference target displaying the chat transcript and connection status figure).



Chat Interaction window on the desktop of your conference target displaying the chat transcript and connection status

The internal target is added to the chat session in your Chat Interaction window. You, the contact, and the internal target can each see what is sent by the others (see the Chat Interaction window displaying the chat transcript and connection status of your conference figure).



Chat Interaction window displaying the chat transcript and connection status of your conference

If the conference target does not accept your request, the conference request is released.

3. If you click the End button and the internal target agent is still connected, the session is transferred automatically to the internal target agent.

If you have completed your chat interaction and the internal target agent has already disconnected from the conference, go to Step 8 of the Lesson: Handling an inbound chat interaction.

End

Lesson: Receiving a chat conference

Purpose: To receive and join a conference chat interaction with another agent and their active chat interaction party.

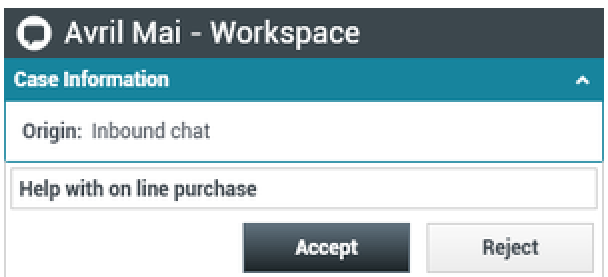
Prerequisites

- You are logged in to Workspace (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 chat conference with you and a contact about their current interaction, the agent can start a chat conference.

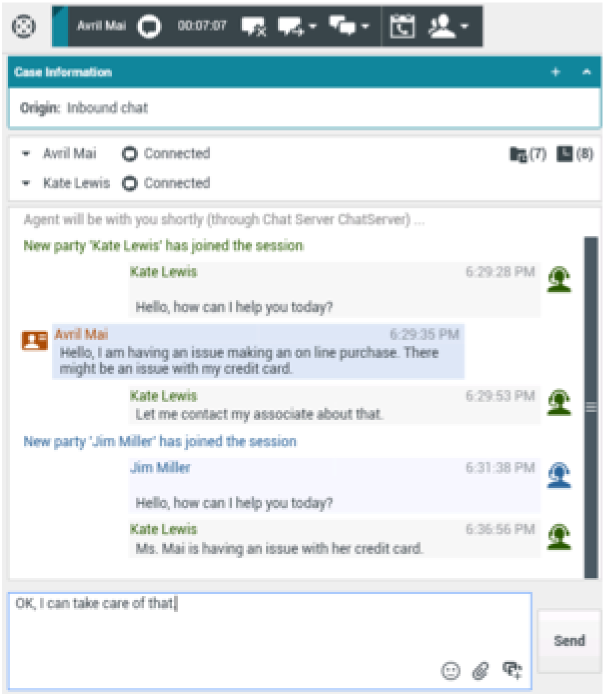
If the other agent is handling a chat interaction and initiates a chat conference request, you are notified of the request by the Workspace Interaction Preview interactive notification (see the Interaction Preview interactive notification, informing you of a conference request figure).



Interaction Preview interactive notification, informing you of a conference 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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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 conference. The Chat Interaction window is displayed (see the Chat Interaction window, displaying your status as Connected to the conferencing agent figure).



Chat Interaction window, displaying your status as Connected to the conferencing agent

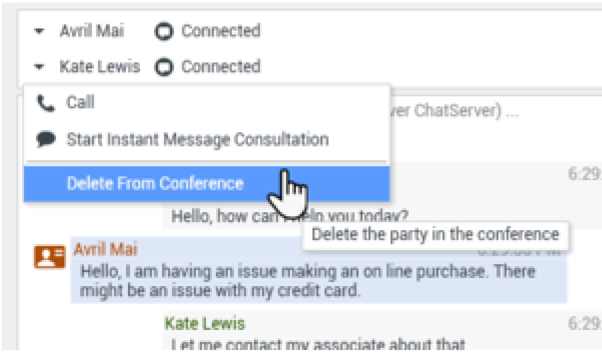
2. The Workspace Chat Interaction window enables you to perform the following functions while you are chatting with the conferencing agent and the contact:
   - End the connection"This function ends your participation in the consultation call; you are not added to the conference.
   - Start a conference.
   - Transfer the chat to a different internal target.

   For information about how to use the functionality in the interaction window, see the *Workspace 8.5 Help*.

   When you join the conference, all three parties will see any text that you enter into the Chat Interaction window. Your status is `Connected` (see the Chat Interaction window, displaying your status as Connected to the conferencing agent figure).

   When you are in a chat conference, you can perform the following functions:
   - Use the `Conference Party Action Menu` (adjacent to the Party Status—see the Conference Party Action Menu figure) to do the following:
     - **Call**—Start a voice call to the party.
     - **Start Instant Message Consultation**—Start an IM consultation with the party.
     - **New E-mail**—Terminate the connection to the party.
     - **Delete From Conference**—Terminate the connection to the party.

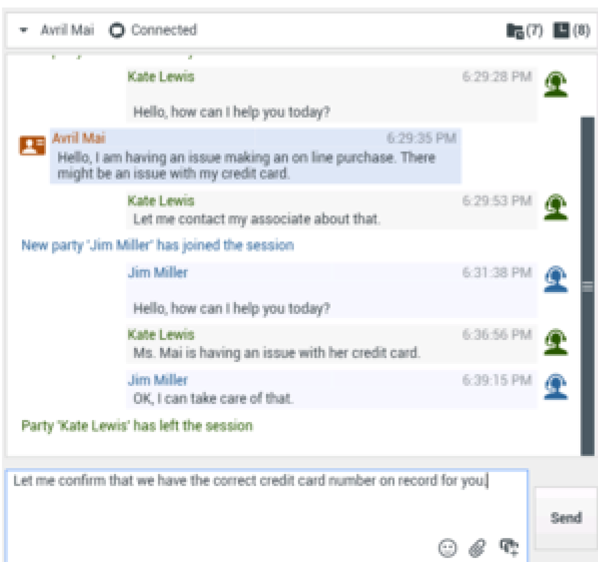
     For information about how to use the functionality in the interaction window, see the *Workspace 8.5 Help*.
3. End the chat—Terminates your connection to the conference. The conferencing agent remains connected to the contact.
4. Set a Disposition Code for the chat.



Conference Party Action Menu

Remaining Connected After the Conferencing Agent Disconnects

If the conferencing agent releases the chat, the conferencing agent is disconnected, but you remain connected to the contact (see the Voice Interaction window showing that the calling agent has left the conference, but you remain connected to the contact figure). You can complete your interaction with the contact, transfer the contact, or start a new conference.



Voice Interaction window showing that the calling agent has left the conference, but you remain connected to the contact

5. Click `End the Chat` to terminate your connection to the conference.

   The Workspace Chat Interaction window is updated to display the status of the conference as Ended. If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the `Disposition Code` drop-down list or radio-button list in the Disposition Code view (see Assigning Disposition Codes).

6. Click Done.
7. Close the Chat Interaction window.
8. Complete your after-call work.

9. Set your status to Ready.

End

Starting a Chat Conference with an Active Consultation

The following procedure demonstrates how to conference a chat interaction to a party with whom you are in a chat consultation; however, it is also possible to conference from other types of consultations, such as voice, by following the same steps that are presented in the procedure.

Lesson: Starting a chat conference with an active consultation

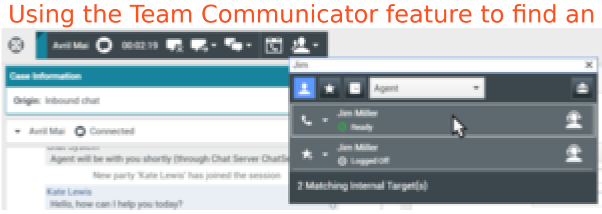
Purpose: To conference the chat with an internal target with whom you are currently engaged in an active consultation.

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).

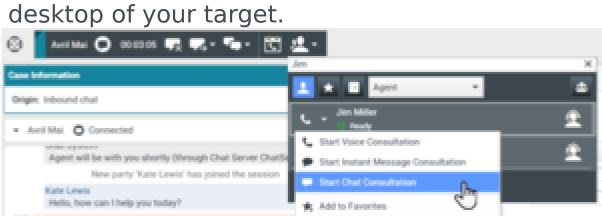
Start

1. 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).



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` (see the Team Communicator displaying a list of available consultation media figure). An interaction notification is displayed on the desktop of your target.



Team Communicator displaying a list of available consultation media

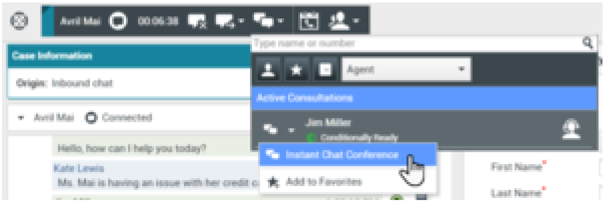
The chat consultation interaction is added to your active chat interaction window (see the Chat Interaction window displaying an active chat interaction and a chat consultation figure).

Chat Interaction window displaying an active chat interaction and a chat consultation

3. To transition your active chat consultation to a chat conference, click the `Instant Chat Conference` button on the main interaction toolbar (see the Team Communicator displaying the list of active consultations figure). The Team Communicator opens and displays your active consultations (see the Team Communicator displaying the list of active consultations figure).

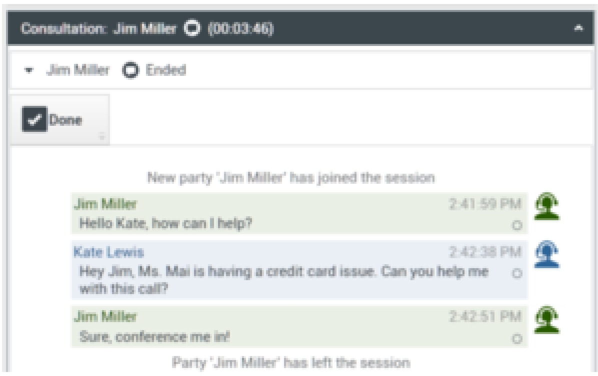
Team Communicator displaying the list of active consultations

4. Click the `Instant Chat Conference` button in the `Action` menu that is next to the name of the consult party with whom you want to conference with your chat interaction (see the Team Communicator displaying the Instant Chat Conference option figure).

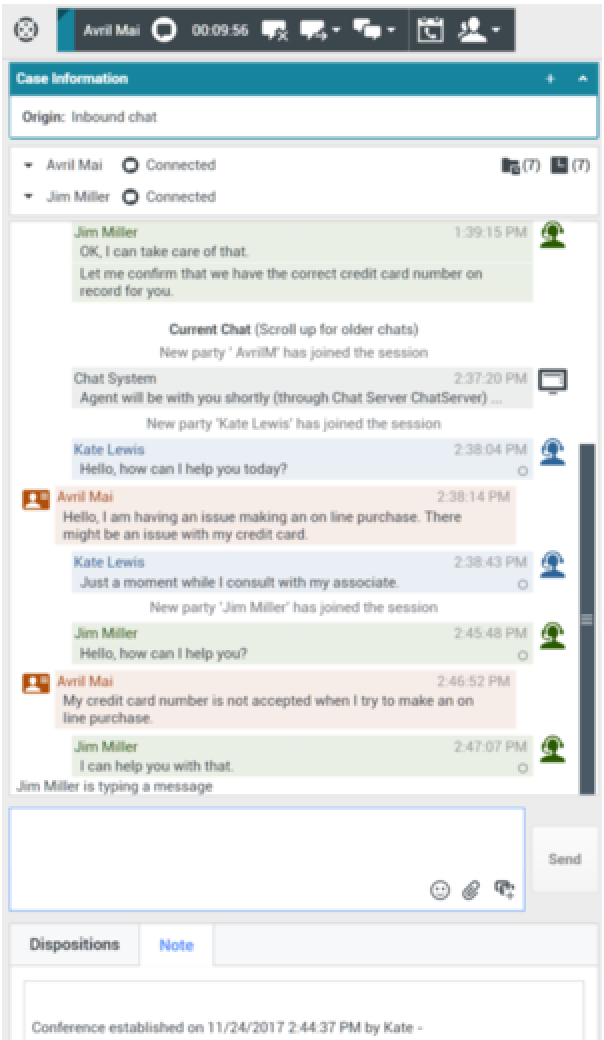


Team Communicator displaying the Instant Chat Conference option

An invitation to join the chat is sent to your conference target. If the target accepts the invitation, the consultation chat ends (see the Status of the chat consultation interaction after the consultation party has been conferenced to a chat interaction figure) and the target is conferenced with you and your contact (seethe Status of the chat consultation interaction after the consultation party has been conferenced to a chat interaction figure).



Status of the chat consultation interaction after the consultation party has been conferenced to a chat interaction



The Chat Interaction window displaying an active chat interaction with a conferenced party that was transitioned from a chat consultation.

5. Complete your chat conference (see Lesson: Starting an instant chat conference).

End

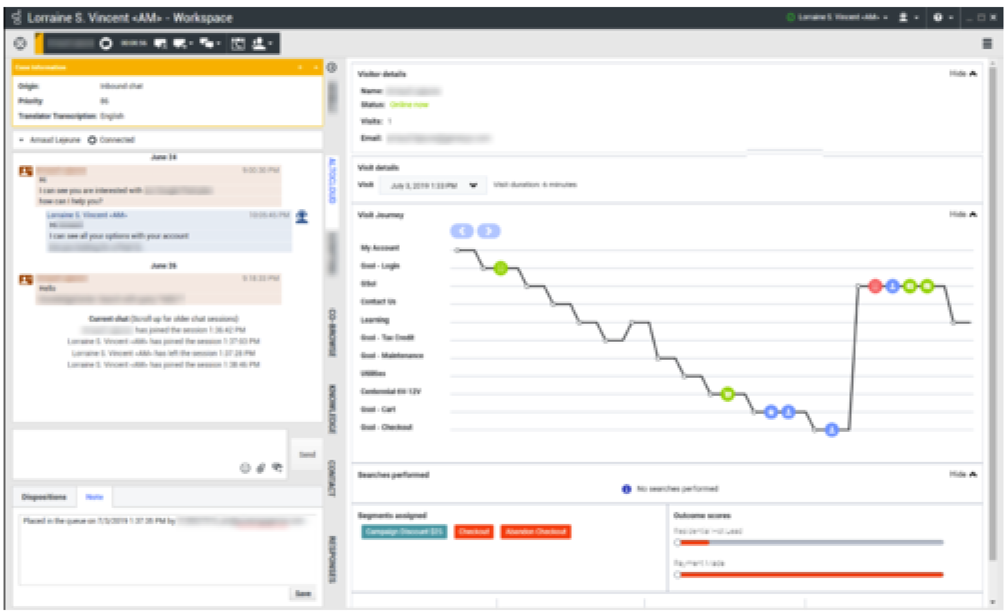
Related Information

- Chat Interaction help

Handle an Altocloud Chat Interaction

If you are set up to use the Genesys Altocloud plugin you will see the **Altocloud** tab on the right side of the Chat interaction window.

> ## Important
> Altocloud Journey might look different in your environment.



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.

Purpose: 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.

Get Started

- Get started
- 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

For information about how to handle a chat interaction, go here.

Handle An Email Interaction

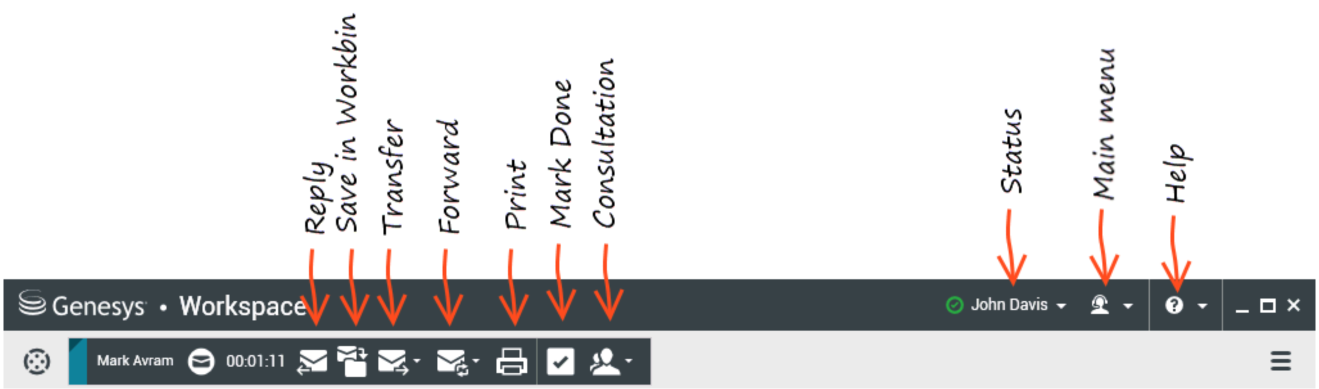
[**Modified:** 8.5.113.11, 8.5.127.06]

In this lesson, you will learn how to handle inbound email interactions and launch outbound email interactions. This lesson contains the following sections:

- Receiving and Handling an Inbound Email Interaction
- Creating and Handling a New or Reply Email Interaction
- Transferring or Forwarding an Email Interaction
- Resending a Previously Sent E-mail Interaction
- Spelling Check
- Printing and Print Preview
- Email Quality Assurance (QA) Review

Receiving and Handling an Inbound Email Interaction

If you are the selected internal target for an inbound email interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it, the Interaction window is displayed. The Email Interaction window contains information about the interaction and the controls that you need to complete the interaction.



> **Important**
>
> Your account might be set up to have your outbound email interactions sent to your team lead or supervisor for a Quality Assurance (QA) review prior to sending the email interaction to your contact. Refer to Email Quality Assurance (QA) Review.

Lesson: Handling an inbound email interaction

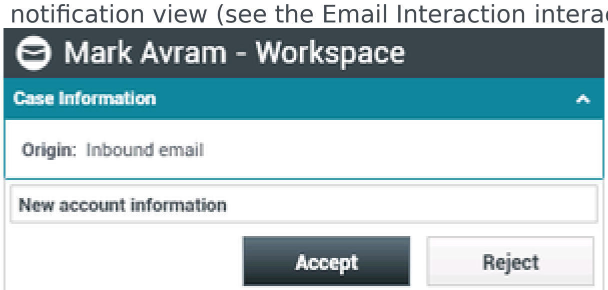
Purpose: To handle an inbound email interaction properly.

Prerequisites

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

Start

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Email Interaction interactive notification figure).



Email Interaction interactive notification

The Interaction Preview contains a summary of information that pertains to the interaction, including contact information and interaction type. The Interaction Preview might also contain Case Information, which is part of the case data about the interaction.

> **Tip**
>
> If you are using a screen reader, your system might be set up to give the focus to the Interaction Preview window. In this scenario, your screen reader will automatically read the window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. However, if your system is not set up 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)

If your account is set up for auto-answer, the Interaction Preview is not displayed and the email interaction is opened automatically unless your account is set up to enable you to preview the case information before the interaction is auto-answered. In this case, when you receive an auto-answer interaction, the Interaction Preview is displayed on your desktop. A timer that counts down the number of seconds until you are connected to the contact is displayed in the **Accept** button (refer to the following figure). You can click **Accept** before the timer runs out or wait for the timer to run out. The **Reject** button might also be displayed if your administrator wants you to have the option of rejecting an interaction before it is auto-answered.[**Added:** 8.5.105.12]

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to display the interaction.

- Click `Reject` to return the interaction to the queue.
- Do nothing. The interaction will time out and be redirected.

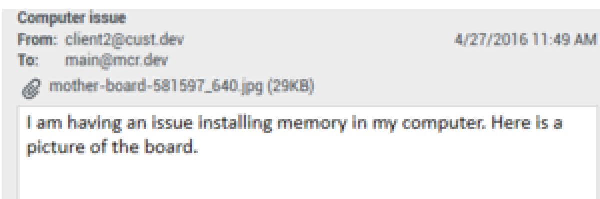
3. If you accept the interaction, the inbound Email Interaction window is displayed (see the Inbound Email Interaction window figure).

 The Inbound Email Interaction window provides the following functionality:

 - `Reply` or `Reply All` to the sender of the email message and other recipients. See Lesson: Replying to a inbound email interaction.
 - Save the email in the In Progress workbin and close the Email Interaction window. See Managing Contact History.
 - Transfer the email message to another internal target or forward it to an external resource. See Transferring or Forwarding an Email Interaction.
 - View and save attached image files (for text and HTML formatted email interactions) and in-line images (for HTML formatted email interactions).

 If your contact inserted the image into the body of the email interaction, you will see it displayed along with the other email content. You can save the image to a local or network drive by right-clicking on it and selecting **Save image as** from the context menu.

 If the image is sent as an attachment, you will see it displayed beside a paperclip icon above the body of the email interaction.

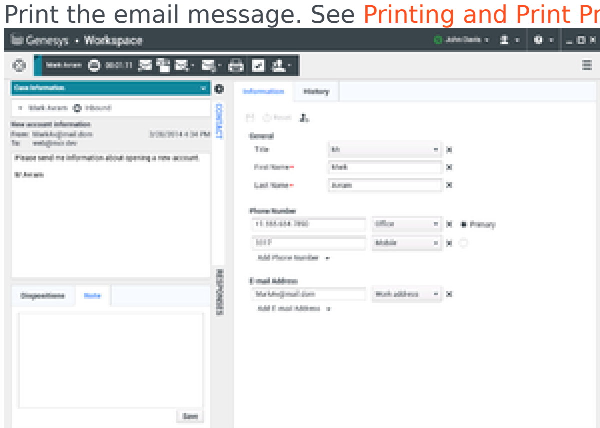
 The paperclip icon indicates the email interaction has an attachment

 Right-click the name of the attached file to perform the following functions:

 - **Open** — Opens the file in the default application for the file type.
 - **Save As** — Save the file to a local or network drive.
 - **Print** — Print the contents of the file to a printer that you specify.
 - **Save All** — Save all attachments to a local or network drive.

 - Select `Mark Done` for the current interaction, save the email message in the contact history and close the Email Interaction window; the processing of the corresponding email thread with the contact is complete.
 - Consult with an internal target or with a contact. See Starting a Voice Conference or Lesson: Initiating an Instant Messaging session.
 - Set a disposition code. See Assigning Disposition Codes.
 - Use the Note to attach a note to the interaction history. See Managing Contact History.
 - View and edit Case Information for the current interaction. Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.

- Call the sender by clicking the `Action` menu that is displayed next to the contact name. See Making a Voice Call.
- View and manage contact history. See Managing Contact History.
- View and manage contact information. See Lesson: Finding and viewing an interaction in the contact database.
- 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.
- View the Standard Response Library if you decide to call the sender instead of replying to the email. See Inserting a Standard Response into an Email Interaction.
- Print the email message. See Printing and Print Preview.



Inbound Email Interaction window

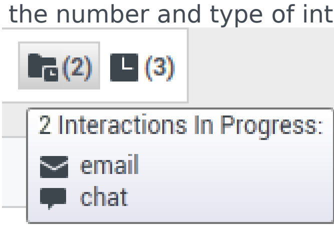
Tip

Sometimes URLs (links to websites) are sent to you by a contact. URLs in the inbound email interaction view might be plain text or they might be HTML. You will be able to read the URL before clicking it by hovering your mouse pointer over the URL to display a tooltip that lets you see the address.

Warning

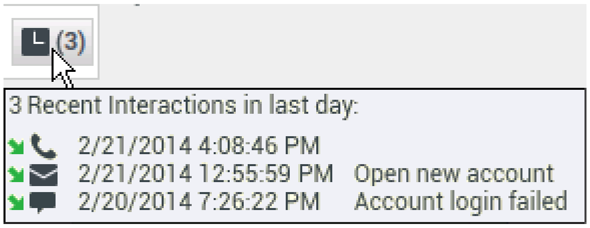
To avoid opening malicious web links, view hyperlinks using the tooltip before you click them.

4. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see the Dynamic Contact History Matrix displaying the number and type of interactions in progress figure). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.



Dynamic Contact History Matrix displaying the number and type of interactions in progress

Your account might be set up for you to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Recent interactions matrix displaying the list of interactions with the current contact within the last day figure). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



Recent interactions matrix displaying the list of interactions with the current contact within the last day

End

Creating and Handling a New or Reply Email Interaction

You can create new email interactions in two ways by replying to an inbound email interaction (see Lesson: Handling an inbound email interaction) and by using the Team Communicator (see Lesson: Using the Team Communicator feature to find a contact) or Contact Directory (see Lesson: Finding and viewing your interactions in the contact database) to find a contact and select the contact as the target of a new outbound email interaction.

Lesson: Replying to a inbound email interaction

[**Modified:** 8.5.113.11, 8.5.118.10, 8.5.127.06]

Purpose: To send a reply to email interactions that have been directed to you.

Prerequisites

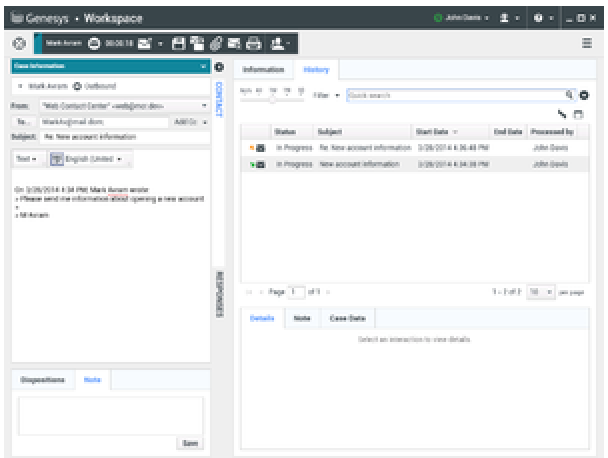
- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have accepted the inbound or transferred email interaction.
- You have clicked `Reply` or `Reply All` in the inbound Email Interaction window (see Lesson: Receiving and Handling an Inbound Email Interaction).

Start

1. If you clicked `Reply` or `Reply All` in the inbound Email Interaction window, the outbound Email Interaction window is displayed (see the Outbound Email Interaction window, displaying text content type figure).

> Important

> Your account might be set up to have signatures inserted automatically into new or reply email interactions based on the sender that you select. The signature will be placed automatically below the text insertion point and above any text that is quoted from the email message to which you are replying. Your account might be set up to have the contents of the original email included in the body of the reply email.



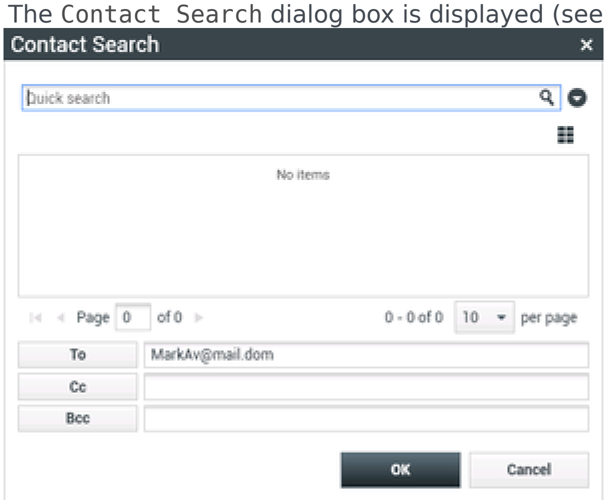
Outbound Email Interaction window, displaying text content type

The outbound Email Interaction window provides the following functionality:

- **Send**—Sends your response to the sender and other recipients, and saves a copy in the Contact History. The corresponding inbound interaction is marked done automatically.
- **Send Interim**—Sends your response, closes the outbound Email Interaction window. The inbound email interaction is reopened in the same window. You can create a second reply email message, or you can consult about the reply with another party. If you close the inbound Email Window, you can re-open it from the In-Progress workbin (see Using Workbins to Access Stored Interactions).
- **Save**—Store what you have written so far.
- **Save in Draft Workbin**—Store what you have written in the Draft workbin (see Using Workbins to Access Stored Interactions) and close the outbound Email Interaction window.
- **Add Attachments**—Navigate to a file that is to be sent with the outbound email. **Note:** Workspace might be set up to restrict the types of files that you attach. If you select a restricted file-type, an error message is displayed to inform you that your company does not permit the attachment of that file type (for example, `.exe`, `.bat`, `.jar`, `.js`, and others).
- **Insert Images**—Insert images into the body of HTML formatted email interactions by copying and pasting an image at the insertion point, or by clicking **Insert Image** () and choosing an image file to insert. [**Added:** 8.5.113.11]
  - After you have inserted an image, you can resize it by dragging on the corners or edges.
  - Dragging on the corners maintains the relative width and height of the image. Dragging on the edges distorts the image.
  - If you make an image smaller, the size of the image file that you send is reduced. This is useful if the image that you want to send is greater than the size you are allowed to send.
  - If you make an image larger, the quality of the image will not be as good and the size of the file increases.
- **Delete**—Discard the outbound reply without saving a copy in the Contact History or the In-Progress

workbin. The inbound Email Interaction window is displayed again on your desktop. The interaction is not marked done.

- **Consultation (Voice/IM)**—Launches a consultation session with another party. Use the Team Communicator to start a voice or IM session with another party (see Starting a Voice Conference or Lesson: Initiating an Instant Messaging session). The consultation interaction is displayed at the bottom of the outbound Email Interaction window.
- **Print**—Print the email message. See Printing and Print Preview.

2. You can edit any of the outbound email parameters before you send the email.
    - To change the name of the sender, click the `From` drop-down menu and select an alternate sender.
    - To change the target of the outbound email, click the `To` button.
      The `Contact Search` dialog box is displayed (see the Contact Search dialog box figure).
      

      Contact Search dialog box
        i. Enter the name, phone number, or email address of a target and then click the magnifying glass.
        ii. Select the target in the results table. For more information about contact search, see Lesson: Finding and viewing your interactions in the contact database.
        iii. Click `To`, `Cc`, or `Bcc` to specify that the target is the primary recipient, a copied recipient, or a blind copied recipient.
        iv. When you have finished adding recipients, click `OK`. Click `Cancel` to return to the outbound Email Interaction window without changing the recipient(s).
    - You can also add carbon copy (Cc) and blind copy (Bcc) recipients by clicking the `Add Cc` drop-down menu and selecting `Add Cc` or `Add Bcc` respectively.
      A new Cc or Bcc field is added in the recipient area. Click in the text field to open the Team Communicator and select a recipient, or click `Cc` or `Bcc` to open the `Contact Search` dialog box (see the Contact Search dialog box figure in the Creating and Handling a New or Reply Email Interaction section). You can remove `Cc` and `Bcc` fields by clicking the `X` that is displayed next to the field.
      You can edit the `To`, `Cc`, and `Bcc` fields by typing directly into the fields. The Team Communicator is displayed to enable you to select a recipient from the contact database.
    - You can edit the default subject of the email. By default, the subject of the inbound email is used.
3. You can add content to the email in four ways:
    - Enter your text at the insertion point.

- Beginning with version 8.5.113.11, Workspace enables you to enter TABs in the email composition area of outgoing email interactions by pressing the **TAB** key. Now, to use the **TAB** key to step to the next control or field, you must first press **Ctrl-TAB** to step out of the text composition area. This feature might be disabled in environments set up for accessibility; if so, you will not be able to enter TABs in the email composition area, but you can use the **TAB** key to move to the next control in the tab order.
- Paste text into the text field from another document. Beginning with version 8.5.150.06, Workspace enables you to paste formatted text as plain text in HTML emails. This option discards source formatting and applies the destination style to the copied text. Right-click the context menu and click `Paste Text Only` to apply this style. You can also use the keyboard shortcut CTRL+ALT+V to paste text only.
- Insert a standard response (see Lesson: Using The Standard Response Library).

4. Some agents might have to write emails in more than one language. Some languages use left-to-right reading script and some use right-to-left reading script. If this feature is enabled for you, click in or select the text that you want to reverse the direction of, then click one of the following buttons in the text edit toolbar to change the reading direction of the text:
   - ¶◂ — Set text to right-to-left reading direction.
   - ▸¶ — Set text to left-to-right reading direction.

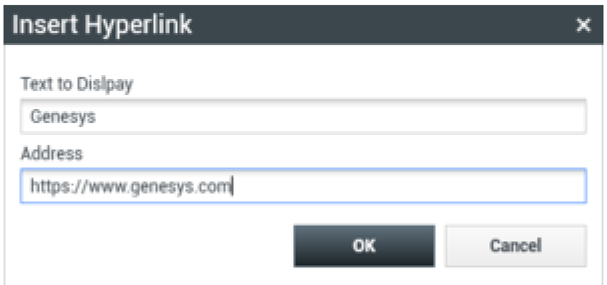
   Watch this video on changing text direction.
   Link to video

   [**Added:** 8.5.127.06]
5. You can check the spelling of the content of your reply by using the Spelling Check functionality (see Lesson: Using Spelling Check to find potentially misspelled words in an outbound email message).
6. You can choose to send your reply as plain text or as HTML-formatted text. To change between plain text and HTML, in the email content area, select either `Text` or `HTML` in the format toolbar. If you switch from HTML to text, all formatting"including paragraph alignment (left, right, centered, indented, numbered, and bulleted), fonts, faces (bold, italic, and underlined), font size, and font color—is lost.
7. If you are using HTML formatting, you can specify the following parameters:
   - Font—Select one of your installed fonts from the `Font` drop-down list.
   - Font size—Select the point size of your text. Available font size depends on the font that is selected.
   - Face—Click the `Bold`, `Italic`, and `Underlined` buttons to select and un-select any combination of these faces.
   - Color—Click the color box to open the color picker, and select a color.
   - Paragraph type—Click the numbered or bulleted button to change paragraphs to a numbered list or a bulleted list, respectively. Click the button again to revert to standard paragraphs.
   - Paragraph alignment—Click the paragraph alignment buttons to align paragraphs left, right, centered, or justified.

   Formatting is applied to either selected text, or any text that you enter or paste at the insertion point after you have set formatting parameters.
8. The outbound email interaction view enables you to create and manage hyperlinks (links to websites). [**Added:** 8.5.118.10]
   a. URLs are detected automatically when you type them into your email interaction and press Space or Enter (Return) on your keyboard. If the URL that you enter is not valid, a hyperlink is not created. The format for URLs is defined by your administrator; if you are trying to type a URL and it is not converted to a hyperlink, consult with your administrator about the format they have defined.

b. If your email interaction is HTML formated, Workspace provides two other ways to create hyperlinks by using the **Insert Hyperlink** dialog box. Open this dialog box by doing one of the following actions:

1. Right-click at the insertion point and select **Insert Hyperlink** from the contextual menu.
2. Click the **Hyperlink** button ().



Insert Hyperlink Dialog Box

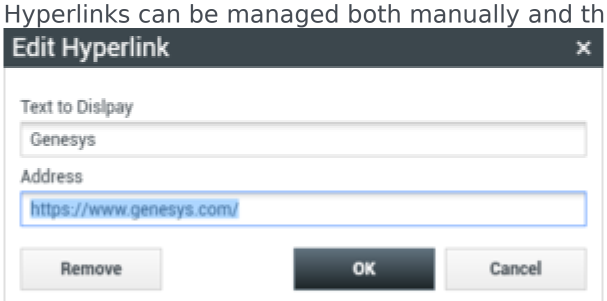
The **Insert Hyperlink** dialog box has two fields:

- **Text to Display** — Enter text in this field if you want display text rather than the URL to be displayed as a hyperlink. For example, if you want to add a hyperlink for your company website, you can add the name of your company to this field, then the name of your company will be a clickable link in the outgoing email. This is particularly useful when you are creating a hyperlink with a very long URL and you do not want the whole URL to display in the email message. If you leave this field blank, the URL is displayed for the hyperlink text.
- **Address** — Enter the fully qualified URL, including `http://` or `https://`.

c. After you have inserted a hyperlink into your email interaction, you can manage it by right-clicking it and selecting one of the following options from the contextual menu:

- **Edit hyperlink** — Opens the **Edit Hyperlink** dialog box.
- **Open hyperlink** — Opens the target of the hyperlink in a new browser window or tab. This enables you to verify the URL before you send it to your contact.
- **Remove hyperlink** — Converts the hyperlink to text. **Note:** if the hyperlink did not have display text and if you press Space or Enter (Return) immediately after you convert the URL to text, it will be converted to a URL again.

d. Hyperlinks can be managed both manually and through the **Edit Hyperlink** dialog box.



Edit Hyperlink Dialog Box

- To manually edit a hyperlink URL, delete the last character and the hyperlink is removed. Edit the text, and then press Space or Enter (Return).
- Open the **Edit Hyperlink** dialog box by placing the insertion point on the display text or URL and clicking the **Hyperlink** button () in the toolbar.

- To edit the display text of a hyperlink, place the insertion point in the display text and edit the text as you would edit normal text.
- To verify the hyperlink, Ctrl-Click the hyperlink to open the URL in a new browser window or tab.

9. You can call (see Making a Voice Call) or send a new email (see Lesson: Creating and sending a new email interaction to a contact) to the sender by clicking the `Action` menu drop-down list that is displayed next to the contact name.
10. You can set a disposition code. See Assigning Disposition Codes.
11. You can use the Note to attach a note to the interaction history. See Managing Contact History.
12. When you have completed composing, formatting (optional), and checking the spelling of your response, click the Send drop-down menu and select Send or Send `Interim` to send the reply email message to the recipient(s).

End

Lesson: Creating and sending a new email interaction to a contact

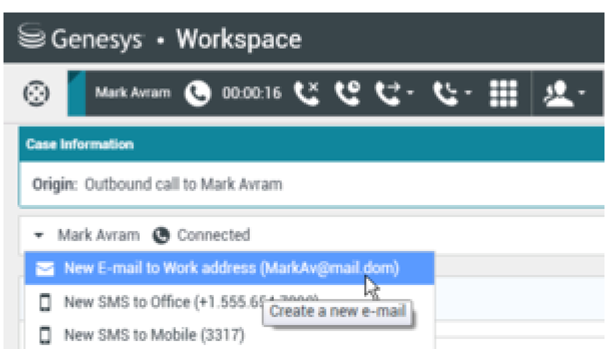
Purpose: To create a new email interaction and send it to a selected recipient or recipients.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- Your role enables you to send new email.

Start

1. There are multiple ways to create a new email interaction:
   - From the Team Communicator, find a contact (see Lesson: Using the Team Communicator feature to find a contact), and select `New Email` from the `Action` menu.
   - From an open interaction (voice, email, chat, or workitem), select `New Email` from the `Action` menu drop-down list that is displayed next to the contact name (see the New Email option in the Action menu drop-down list that is displayed next to an active contact name figure).



New Email option in the Action menu drop-down list that is displayed next to an active contact name

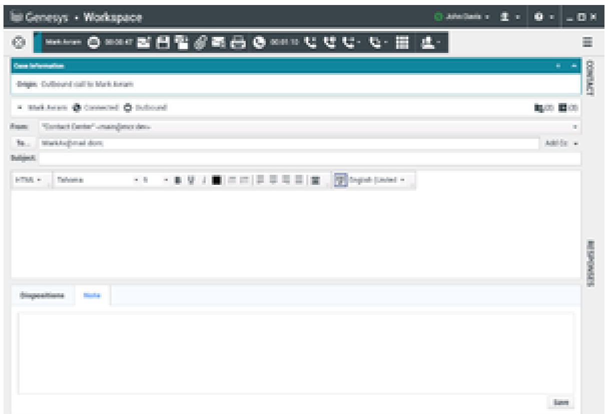
   - From the Contact Directory, find a contact, and select `New Email` from the Email `Action` menu or from the `More Actions` menu.
     A new Email Interaction window is displayed on your desktop (see the New Email Interaction window figure). The name of the contact is specified in the To field, and your default sender address

that is displayed in the From drop-down list.

Important

Your account might be set up to have signatures inserted automatically into new or reply email interactions based on the sender that you select. The signature will be placed automatically below the text insertion point and above any text that is quoted from the email message to which you are replying.

The new Email Interaction window has the same functionality as the reply Email Interaction window (see Lesson: Replying to a inbound email interaction), except that the Note tab is not available.



Procedure: Replying to a inbound email interaction

2. When you have completed composing, formatting (optional), inserting images and/or attaching files (optional), and checking the spelling (see Lesson: Using Spelling Check to find potentially misspelled words in an outbound email message) of your new email, click the Send button to send the new email to the recipient(s).

End

Transferring or Forwarding an Email Interaction

The Workspace Email Interaction window enables you to transfer or forward your current email message interaction to another party. In this section, you will learn how to use the Team Communicator feature to transfer an email interaction to an internal target or to a contact or to forward an email to an external resource that is set up in your corporate directory. The Team Communicator enables you to find an internal target or a contact, send an Instant Message (IM) to an internal target, call a contact or an internal target, initiate a conference, or transfer a call.

How do you know whether to transfer or forward? Here are some possible use cases:

1. **Transfer** — Pass the ownership and handling of the email interaction to another agent or transfer target within your contact center system.
2. **Forward** — Send a copy of an email to someone outside the contact center system, such as a person in your back office, and ask a question about it, then you use the answer that you receive to complete your response to your contact.

3. **Forward as an Attachment** — Send a copy of an email to someone outside of the contact center system, such as a person in your back office, that you want to write the response to the email for you.

This section contains the following procedures:

- Lesson: Initiating an email transfer
- Lesson: Initiating an email forward [**Added:** 8.5.113.11]
- Lesson: Initiating an email forward as an attachment [**Modified:** 8.5.113.11] (formerly Forward an Email to an External Resource)

Tip

In some environments, you might have to set a disposition code before you transfer or forward an email interaction.

Lesson: Initiating an email transfer

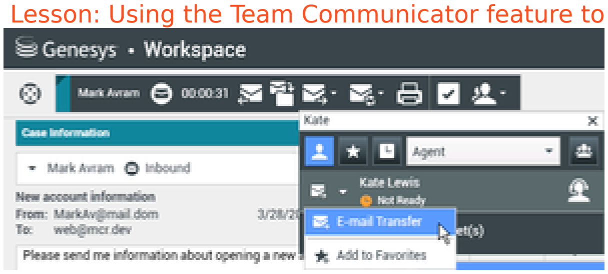
Purpose: To find an internal target (such as an agent, Routing Point, or queue) and then transfer the email message to the target.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have an active interaction with a contact (see Receiving and Handling an Inbound Email Interaction).

Start

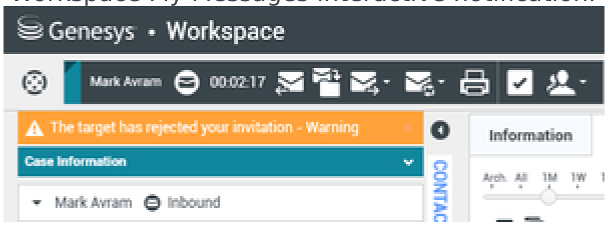
1. To transfer the email message, in the active Email Interaction window, click `Transfer` to open the Team Communicator (see the Finding an internal target for an email transfer in the active Email Interaction window figure) to find the internal target to whom you want to transfer the current interaction (see Lesson: Using the Team Communicator feature to find an internal target).



Finding an internal target for an email transfer in the active Email 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 `Email Transfer`. An invitation is sent to the target to accept the email 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 Email Interaction window remains displayed on your desktop and an error is displayed both at the top of the window (see the Workspace Email Interaction window displaying a message that the transfer target rejected the transfer request figure) and in the

Workspace My Messages interactive notification.



Workspace Email Interaction window displaying a message that the transfer target rejected the transfer request

End

Lesson: Initiating an email forward

[**Added:** 8.5.113.11]

Purpose: To find an external resource, and then forward the email message as an in-line quoted message to the target — The typical use case is that you forward an email and ask a question about it, then you use the answer that you receive to complete your response to your contact.

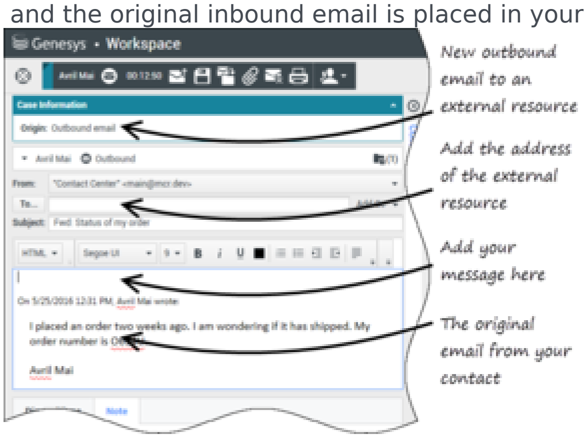
Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have an active interaction with a contact (see Receiving and Handling an Inbound Email Interaction).

Start

1. To forward the email message as an in-line quoted message to an external resource, click Forward () on the active inbound email window toolbar.

   Note: If Forwarding as an Attachment is also enabled for you, a menu is displayed; choose **Forward**, not **Forward as an Attachment.** The Forward Email view opens as a new Outbound email interaction, and the original inbound email is placed in your **In-Progress** workbin.



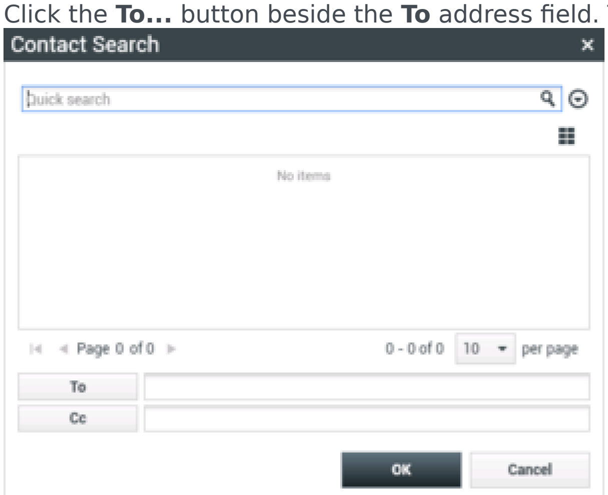
The Forward Email interaction view

This view contains a copy of the original email from your contact at the bottom of the email body area. A notice above the email

indicates who wrote it and the date and time it was sent.
The Subject field of the email contains the subject of the original email with a prefix in front of it, such as **Fwd:**.
The Forward Email interaction view enables you to perform the following actions:

- Add one or more targets by clicking **To** or by typing in the **To** field
- Add "carbon copy" targets by clicking **Add Cc** and then clicking **Cc** or by typing in the **Cc** field
- Add instructions for the target by typing in the email body area, above the in-line forwarded email content
- Add an interaction note in the Note tab
- Save the email in your Draft workbin
- Attach one or more files to the forwarded email
- Cancel the Forward action
- Print the email before forwarding it
- Consult with other people about the email
- Complete the Forward action

2. To add a target to the **To** address field, do one of two things:
   - Use Team Communicator to find and add a target or targets:
     a. Start typing a name or other contact information in the **To** address field. The Team Communicator opens and enables you to choose a target.
     b. Click **Add Email Address** to enter the email address of the target in the address field.
   - Use the Contact Search dialog box to find and add a target or targets:
     a. Click the **To...** button beside the **To** address field. The Contact Search dialog box is displayed.



Contact Search dialog box

You can use this view to perform a search of the Contact Directory for targets. The Contact Search dialog box can also be used to add **Cc** targets.

The Contact Search dialog box enables you to find contacts by using one of two modes: Quick Search and Advanced Search.

     b. To perform a quick search, type the name, phone number, or email address of a contact in the `Quick Search` field. Quick search is a *begins with* search.

Contact Quick Search

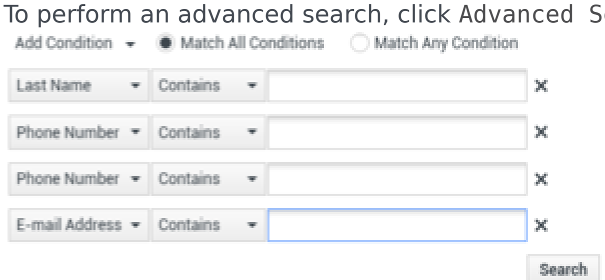
Tip

Genesys does not support *wildcard* characters in Contact Database searches

c. Click the magnifying glass to search for the value that you have entered. The contact database is searched based on your criteria and the search results are displayed in the Contact Directory (see step h).

Click the **X** to clear the Quick Search field.

d. To perform an advanced search, click Advanced Search ( ) to open the Advanced Search view.



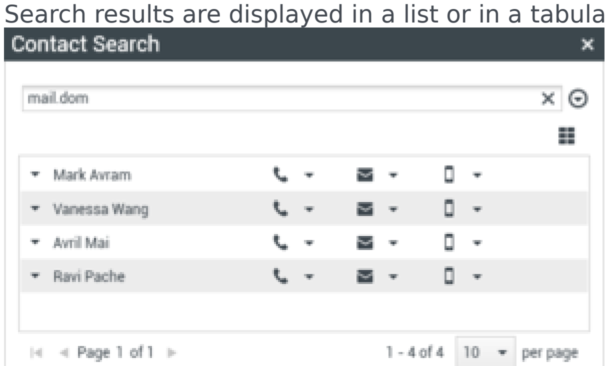
Contact Advanced Search

e. Click the **Add Condition** link to add more search criteria. Remove criteria from consideration by clicking the **X** next to the option.

f. Click the magnifying glass to search for the value(s) that you have entered. The contact database is searched based on your criteria and the search results are displayed in the Contact Directory (see step h).

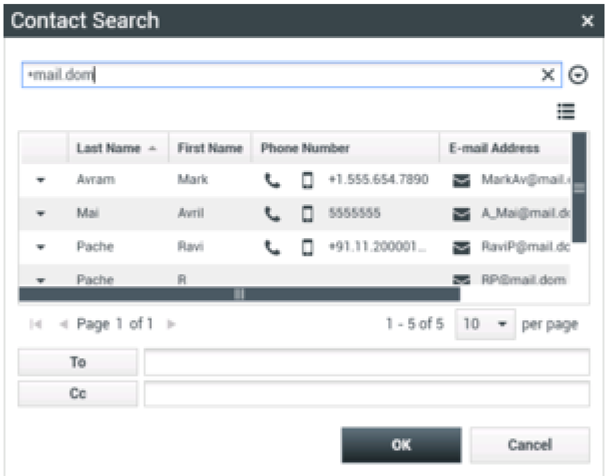
Click the **X** to clear all search field.

g. Search results are displayed in a list or in a tabular grid.



Search Results list view

Use the **Show Contacts** View ( ) button to toggle back and forth between the list and grid views.



Search Results grid view

h. If multiple pages are returned in the search results, page through the list of search results by doing any of the following:

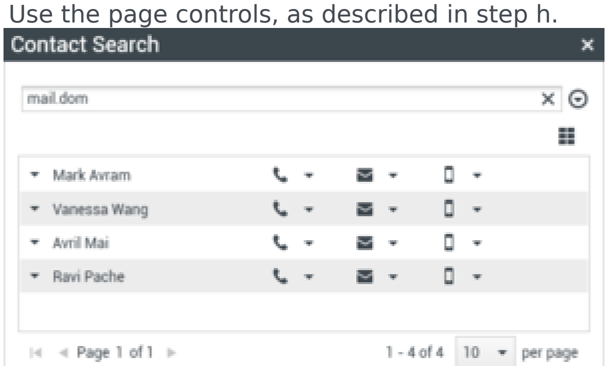
- Click the **Go to the Next Page** button () to view the next page
- Click the **Go to the Previous Page** button () to view the previous page
- Click the **Go to First Page** button () to return to the start of the list of search results
- Click the **Go to Last Page** button () to return to the start of the list of search results
- Specify the number of items that are displayed on each page by using the **per page** drop-down list

i. To display the Contact Directory List view, click the **Show Contacts in List View** button (). The List view displays an unsorted list of all of the contacts in the contact database that match the search criteria.

The search is a “keyword” search that searches each field of the contact database for the word or words (name, phone number, email address, or other criteria) that you provide in the search field. Each field of the database is searched by using a “starts-with” search for the keyword(s) that you provide.

Refer to the Contact Directory topic in the *Workspace Desktop Edition Help* for more information about search results.

Use the page controls, as described in step h.



Contact Directory in List View

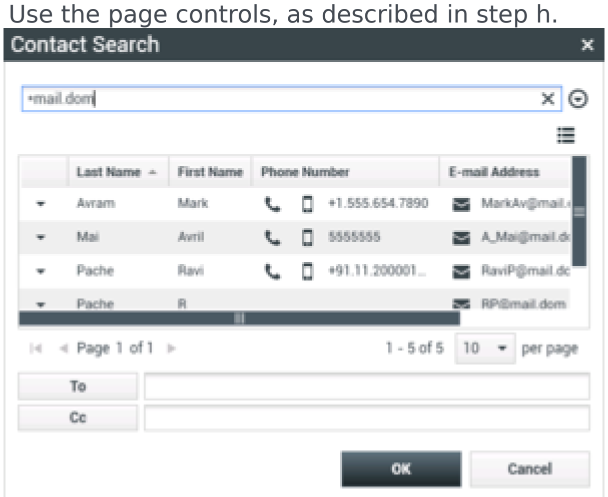
j. To display the Contact Directory Grid view, click the **Show Contacts in Grid View** button ( ). Grid mode performs a *begins-with* search that searches each field of the contact database for the phrase (name, phone number, email address, or other criteria) that you provide in the search field.

   Results are returned in tabular form and sorted according to the default search field, such as Last Name.

   The Grid view can be used to help to refine your search by sorting the results.

   Click a column head in the Grid view to sort the list based on that criterion. Click a column head a second time to switch between ascending and descending sort order.

   Use the page controls, as described in step h.



Contact Directory in Grid View

k. To add a target from the search results to either the **To** field or the **Cc** field, select the target in either the list or grid view, then click either **To** or **Cc**.

l. Click **OK** when you have finished selecting targets. The Contact Search dialog box closes and you are returned to the Forward Email interaction view. The targets that you selected are displayed in the **To** field and, if selected, the **Cc** field.

3. To display the **Cc** address field in the Forward Email interaction view, click **Add Cc**. The **Cc** address field is displayed below the **To** address field. You add target email addresses to the **Cc** field in the same way that you add addresses to the **To** address field. Click **X** to remove the **Cc** address field.
4. To add a comment, information, or instructions to the forwarded email interaction for the target, type in the email body area, above the in-line forwarded email content.
5. To forward the inbound email interaction to the targets, click ( ) **Complete Forward**. The interaction window closes on your desktop, the email is forwarded to the in-box of the external resource, and the inbound email interaction is removed from your **In-Progress** workbin. Click **Cancel Forward** if you want to close the Forward view without forwarding the email interaction.

End

Lesson: Initiating an email forward as an attachment

[**Modified:** 8.5.113.11]

[**Modified:** 8.5.104.15]

Purpose: To find an external resource, and then forward the email message as an attachment to the target — The typical use case is that you want someone else to write the response to the email.

Prerequisites

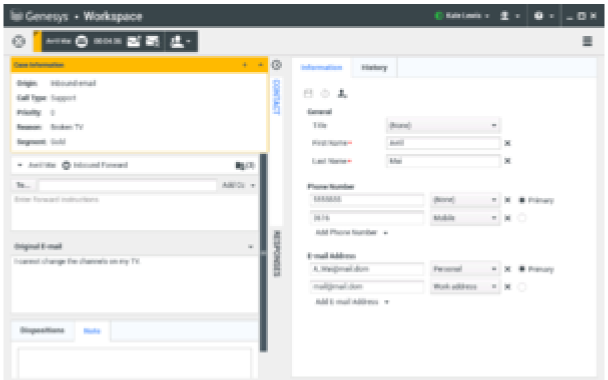
- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have an active interaction with a contact (see Receiving and Handling an Inbound Email Interaction).

> **Important**
> Depending on how the Forward as an Attachment Business Process is designed by your administrator, either the `Note` tab or the instructions field might be used to contain instructions to generate the email interaction that is sent to the external resource.

Start

1. To forward the email message as an attachment to an external resource, click `Forward as an Attachment` () on the active inbound email window toolbar.
   Depending on the set up your system, this action might:
   - Open the Team Communicator
   - Display the Forward Email as an Attachment interaction view.
   - If Forwarding in-line is also enabled for you, a menu is displayed; choose **Forward as an Attachment**, not **Forward.**
2. If the Team Communicator opens, perform the following actions:
   a. Enter the valid email address or find a contact to which the email message is to be forwarded
   b. Click the `Action Menu` drop-down list that is displayed next to the name of the external resource to whom you want to forward the interaction, and then select `Forward as an Attachment`

   The interaction window closes on your desktop and the email message is forwarded to the in-box of the external resource.
3. If the Forward Email as an Attachment interaction view is displayed.



Forward Email as an Attachment interaction view

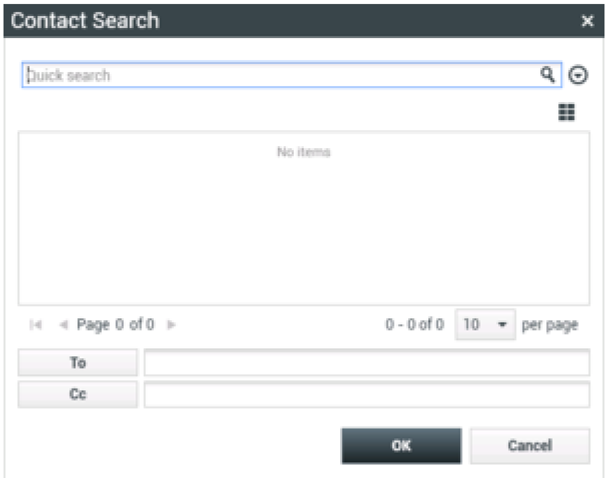
The Forward Email as an Attachment interaction view enables you to perform the following actions:

- Add one or more targets by clicking **To** or by typing in the **To** field
- Add "carbon copy" targets by clicking **Add Cc** and then clicking **Cc** or by typing in the **Cc** field
- Add instructions for the target
- Add an interaction note in the Note tab
- Cancel the Forward action
- Consult with other people about the email
- Complete the Forward action

Tip

Your system might not be set up for all the features of Forward email. For example, the Team Communicator might not open, or the Forward Email as an Attachment interaction view might not be displayed. You might be restricted to one **To** target, **Cc** might not be enabled, or the instructions field might not be available.

4. To add a target to the **To** address field, do one of two things:
   - Use Team Communicator to find and add a target or targets:
     a. Start typing a name or other contact information in the **To** address field. The Team Communicator opens and enables you to choose a target.
     b. Click **Add Email Address** to enter the email address of the target in the address field. If your environment is set up to enable you to enter multiple addresses, you can click in the address field and enter additional email addresses.
   - Use the Contact Search dialog box to find and add a target or targets:
     a. Click the **To...** button beside the **To** address field. The Contact Search dialog box is displayed.

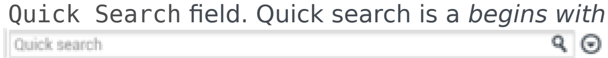


Contact Search dialog box

You can use this view to perform a search of the Contact Directory for targets. The Contact Search dialog box can also be used to add **Cc** targets.

The Contact Search dialog box enables you to find contacts by using one of two modes: Quick Search and Advanced Search.

b. To perform a quick search, type the name, phone number, or email address of a contact in the `Quick Search` field. Quick search is a *begins with* search.



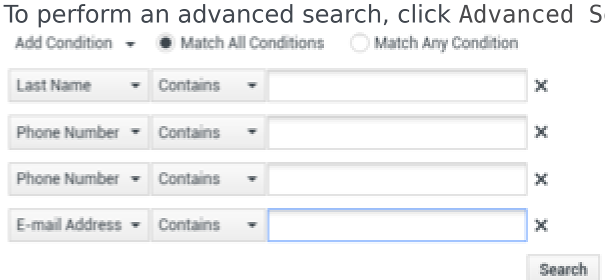
Contact Quick Search

> ## Tip
> Genesys does not support *wildcard* characters in Contact Database searches

c. Click the magnifying glass to search for the value that you have entered. The contact database is searched based on your criteria and the search results are displayed in the Contact Directory (see step h).

Click the **X** to clear the Quick Search field.

d. To perform an advanced search, click `Advanced Search` () to open the Advanced Search view.



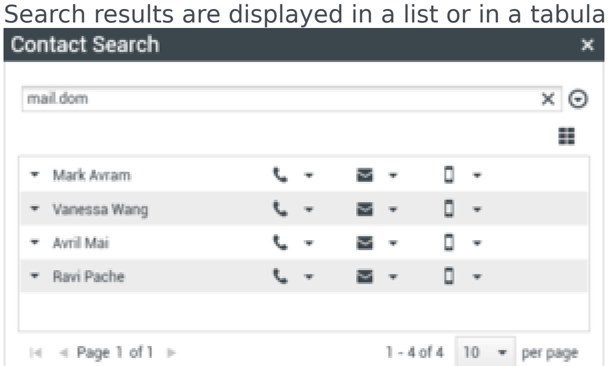
Contact Advanced Search

e. Click the **Add Condition** link to add more search criteria. Remove criteria from consideration by clicking the **X** next to the option.

f. Click the magnifying glass to search for the value(s) that you have entered. The contact database is searched based on your criteria and the search results are displayed in the Contact Directory (see step h).

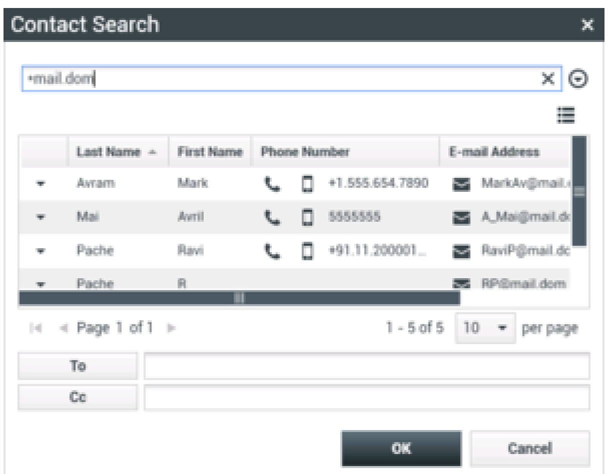
Click the **X** to clear all search field.

g. Search results are displayed in a list or in a tabular grid.



Search Results list view

Use the **Show Contacts** View ( ) button to toggle back and forth between the list and grid views.



Search Results grid view

h. If multiple pages are returned in the search results, page through the list of search results by doing any of the following:

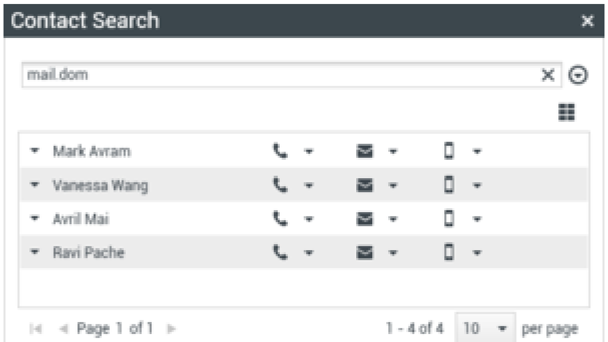
- Click the **Go to the Next Page** button ( ) to view the next page
- Click the **Go to the Previous Page** button ( ) to view the previous page
- Click the **Go to First Page** button ( ) to return to the start of the list of search results
- Click the **Go to Last Page** button ( ) to return to the start of the list of search results
- Specify the number of items that are displayed on each page by using the **per page** drop-down list

i. To display the Contact Directory List view, click the **Show Contacts in List View** button ( ). The List view displays an unsorted list of all of the contacts in the contact database that match the search criteria.

The search is a “keyword” search that searches each field of the contact database for the word or words (name, phone number, email address, or other criteria) that you provide in the search field. Each field of the database is searched by using a “starts-with” search for the keyword(s) that you provide.

Refer to the Contact Directory topic in the *Workspace Desktop Edition Help* for more information about search results.

Use the page controls, as described in step h.



Contact Directory in List View

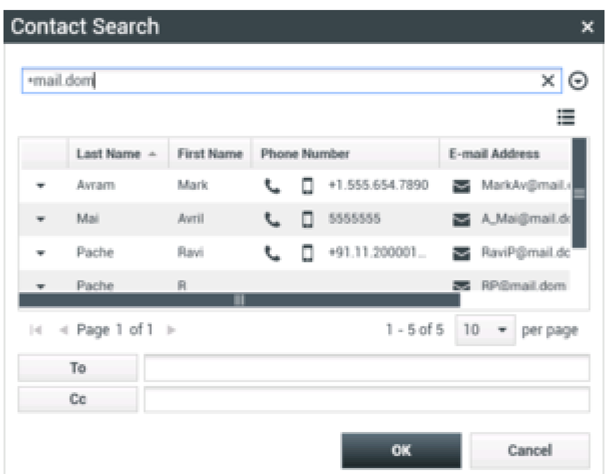
j. To display the Contact Directory Grid view, click the **Show Contacts in Grid View** button (). Grid mode performs a *begins-with* search that searches each field of the contact database for the phrase (name, phone number, email address, or other criteria) that you provide in the search field.

Results are returned in tabular form and sorted according to the default search field, such as Last Name.

The Grid view can be used to help to refine your search by sorting the results.

Click a column head in the Grid view to sort the list based on that criterion. Click a column head a second time to switch between ascending and descending sort order.

Use the page controls, as described in step h.

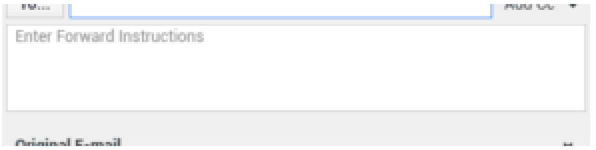


Contact Directory in Grid View

k. To add a target from the search results to either the **To** field or the **Cc** field, select the target in either the list or grid view, then click either **To** or **Cc**.

l. Click **OK** when you have finished selecting targets. The Contact Search dialog box closes and you are returned to the Forward Email interaction view. The targets that you selected are displayed in the **To** field and, if selected, the **Cc** field.

5. To display the **Cc** address field in the Forward Email interaction view, click **Add Cc**. The **Cc** address field is displayed below the **To** address field. You add target email addresses to the **Cc** field in the same way that you add addresses to the **To** address field. Click **X** to remove the **Cc** address field.
6. To add a comment, information, or instructions to the forwarded email interaction for the target, click in the text box below the **To** and **Cc** fields and enter your message.



Forward Email interaction instructions field

7. To forward the inbound email interaction to the targets, click ( ) **Complete Forward as an Attachment**. The interaction window closes on your desktop and the email is forwarded to the in-box of the external resource. Click **Cancel Forward as an Attachment** if you want to close the Forward as an Attachment view without forwarding the email interaction.

End

Resending a Previously Sent E-mail Interaction

You can use the Contact History view (refer to Managing Contact History) to resend a previously sent outbound email to the original contact to follow-up with the contact about the interaction. The status of the outbound interaction must be Done. You can edit the contents of the email interaction before you send it.

Lesson: Resending a previously sent email interaction

Purpose: To resend an email interaction that has been marked Done to the same recipient.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- There is an outbound email interaction in the Contact History that has already been sent to the contact and is now marked as Done. The email interaction might be a new outbound email interaction, or it might be a reply email interaction.

Start

1. In the Main Window, or in the Contact Directory of an active interaction window, open the Contact History (refer to Lesson: Finding and viewing an interaction in the contact database).
2. Find the email interaction that you want to resend and select it.
3. Click Resend ( ). The E-mail Interaction window is displayed. The message text of the original outbound email interaction and any attachments are copied to the new interaction. The To, From, and CC fields are copied from the original outbound email interaction.
4. Add the new message text (your follow-up message) in the email text field. You can add content to the email in three ways:

   - Enter your text at the insertion point.
   - Paste text into the text field from another document.
   - Insert a standard response (see Lesson: Using The Standard Response Library).
     Refer to Lesson: Replying to a inbound email interaction and Lesson: Creating and sending a new email interaction to a contact for information about the options that are available in the outbound E-mail Interaction window.

5. You can check the spelling of the content of your follow-up message by using the Spelling Check functionality (see Lesson: Using Spelling Check to find potentially misspelled words in an outbound email message).
6. When you have completed composing, formatting (optional), and checking the spelling of your email interaction, click the Send button to send the email interaction to the recipient(s).

End

Spelling Check

You might be enabled to use the Spelling Check functionality. The outbound Email Interaction window has automatic spelling-check capabilities that enable you to correct misspelled words or add words to your personal dictionary.

Lesson: Using Spelling Check to find potentially misspelled words in an outbound email message

Purpose: To verify the spelling of the content of an outbound email message.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have an active email interaction (see Receiving and Handling an Inbound Email Interaction or Creating and Handling a New or Reply Email Interaction).

Start

1. Begin entering text in the composition area of a new (Lesson: Creating and sending a new email interaction to a contact) or a reply (Lesson: Replying to a inbound email interaction) outbound email message.

   You can enter text by typing at the insertion point, pasting content from another document, or inserting a standard response (Lesson: Using The Standard Response Library).

2. The Spelling Check functionality is controlled by the Spell Check toolbar (you might have to expand the Email Interaction window to see the toolbar).

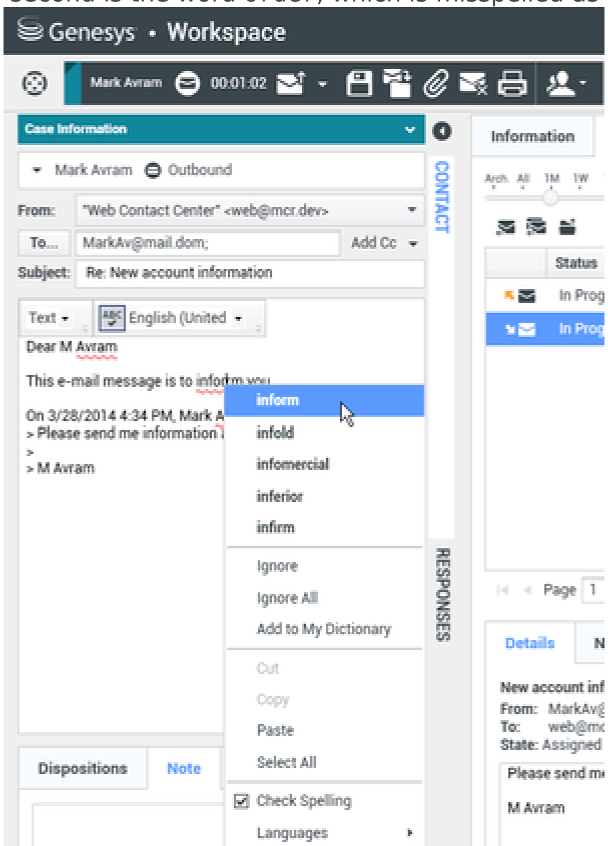
   

   Spelling Check toolbar

   - Click the `Spell Check` button to turn Spelling Check functionality on and off. **Note:** If your system is set up to warn you about incorrectly spelled words when you click Send, then the Spell Check button is not displayed as you are not permitted to turn off spelling check.

- From the Language drop-down list, select the spelling dictionary (language) that you want to use.

3. When the Spelling Check functionality is on, words in the text composition area that are not in the specified dictionary are underlined by a wavy, red line. The mail composition area displaying a misspelled word that is underlined in red figure shows an email message that contains two words that are not in the `English (United States)` dictionary. The first is the name of the contact and the second is the word `order`, which is misspelled as `ordder`.



Email composition area displaying a misspelled word that is underlined in red

4. You can correct the spelling by using one of two methods:
   - Edit the word(s) manually.
   - Right-click the word to display the `Spelling Check` menu.

5. If you right-clicked the misspelled word to display the `Spelling Check` menu, you can do one of the following:
   - Select the correct spelling from the list of suggestion (bold text).
   - `Ignore`—Select to ignore this instance of the word that is not in the specified language dictionary.
   - `Ignore All`—Select to ignore all instances of the word that is not in the specified language dictionary for this interaction only.
   - `Add to My Dictionary`—Select to add the spelling to your personal dictionary (not your corporate dictionary).
   - `Spell Checking`—Select to turn the Spelling Check functionality off or on.

- Languages—Select to open the list of available language dictionaries. You can select a different language dictionary.

6. If you try to send a message that contains misspelled world, your system might be set up 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]

End

Printing and Print Preview

You can use the Print Preview window to specify the format of email interactions before you print them.

Lesson: Formatting and printing email interactions

Purpose: To preview, format, and print an email interaction.

Start

1. From an active `Email Interaction` window, click `Print`. The `Print Preview` window is displayed.
2. The `Print Preview` window contains controls for designing your print layout, and it contains the Print Layout view. You can preview your printout in the Print Layout view. The Print Layout view contains the following controls:
   - Zoom in/out—Change the magnification of the view to see more or less detail.
   - View at 100%—View the layout at the full printed page size.
   - Fit the page into the view by page width—Make the view fit the of the layout fit the width of the window.
   - Fit the whole page into the view—Make the entire page fit the window.
   - View pages as front and back pairs side-by-side—For two-sided printing, view front and back pages side-by-side.

   You can change these view settings at any time while you have the `Print Preview` window displayed.
3. From the `Destination` drop-down list, select a destination printer from the list of available printers on your network.
4. Specify which pages to print:
   - `All`—Click `All` to print the entire email interaction.
   - `Page Range`—Enter one or both of the following in the `Page Range` text field:
     - A range of page numbers, for example: `2-6`
     - Individual page numbers that are separated by commas., for example: `1,3,4`.
5. Specify the number of copies to print in the `Copies` field.
6. Specify a `Portrait` or `Landscape` layout.

7. Specify the page margins:
   - Select Uniform Margins to make all the margins match the value that you specify for the top margin.
   - To specify different margins for the top, left, right, and bottom margins, de-select Uniform Margins. Margin units are determined by your local settings.
8. Select Add Page Numbers to add page numbers to the printout.
9. Print the email interaction by applying the layout that you specify:
   - Click Print to print the specified layout.
   - Click Cancel to close the Print Preview window.

   Otherwise, click Print using the System Print dialog box to open the System Print dialog box.

End

Email Quality Assurance (QA) Review

Your account might be set up to have your outbound email interactions sent to your team lead or supervisor for a QA review prior to sending the email interaction to your contact (refer to Receiving QA Feedback), or your account might be set up for you to be a QA reviewer (refer to the Lesson: QA Review of Email Interactions).

Receiving QA Feedback

Your QA reviewer might return the email interaction to you to be updated, or the reviewer might accept the email and allow it to be sent. The review process might require more than one iteration. E-mail interactions that are sent for review might be directed to the reviewer or it might be stored in a workbin that is specifically for reviews. The reviewed email interaction might be returned to you directly or it might be stored in a workbin that is specifically for email interactions that are to be updated or reworked. The status of the review is displayed in the Case Information view for the interaction so that you know whether you have to update the email interaction content or not. If the status is Rejected (or some other disposition that is defined by your system administrator), then the email interaction was not sent to the contact. The reviewer might update the content of the email or the reviewer might add instructions for you in the Note view. After you have completed the updates to the email interaction, click Send to deliver the email interaction back to the reviewer for approval or rejection. Refer to Receiving and Handling an Inbound Email Interaction, Creating and Handling a New or Reply Email Interaction, and the *Workspace 8.5 Help* for information about using the Email Interaction window.

Providing Email QA Feedback

Your account might be set up to review outbound email interactions created by agents that you supervise, lead, or review, for Quality Assurance (QA) purposes. If you are a reviewer, outbound emails are directed to you prior to being sent to a contact. As a reviewer, your account might be set up to receive email interactions for review by an interaction preview or your account might be set up to retrieve outbound email interactions from a workbin (refer to Using Workbins).

Lesson: QA Review of Email Interactions

Purpose: To review outbound email interactions from an agent and provide feedback to the agent before sending the email interaction to the recipient.

Prerequisites

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

Start

1. When an email interaction for review is directed to you, an interaction preview is displayed on your desktop.
   - Click `Accept` to display the interaction
   - Click `Reject` to return the interaction to the queue.
     The `Interaction Preview` window displays the `Case Information` view:
     - The `Origin` field specifies the sender of the interaction and indicates that it is for review.
     - The `QA Review Status` field is editable. It contains attached data that specifies the status of the review. When you first receive it, the status might be `Unknown` or `For Review`, depending on how your administrator has set up your system. There might be other information about the priority of the interaction or the business area to which it belongs.
2. If you accept the email interaction for review, the `Review E-mail Interaction` window is displayed on your desktop:
   - The `Case Information` view is displayed in the Interaction window.
   - The `Origin` field specifies the sender of the interaction and indicates that it is for review.
   - The `QA Review Status` field is editable. It contains attached data that specifies the status of the review.
   - The `Party Action` menu displays the email monitoring icon to indicate that the agent is under review ().
   - The `Interim Send` button is not available for review email interactions.

   Review the interaction and provide feedback to the agent who originated the outbound email interaction.
   Depending on the policy at your company, you might provide feedback by directly editing the content of the email interaction, or you might add notes for the agent in the `Note` view, or you might discuss the content with the agent verbally.
3. In the `Review E-mail Interaction` window, you can do the following tasks:
   - Update the `Review Status` in the `Case Information` view
   - Edit the content of the email interaction
   - Set a disposition
   - Add text to the `Note` tab
   - Use other standard E-mail Interaction window functions (refer to Receiving and Handling an Inbound

Email Interaction)

4. When your review is complete, set the status to one of the following states:
   - `Accepted`—The email interaction is sent to the contact when you click Send.
   - `Rejected`—The email interaction is sent back to the agent or to a workbin that contains reviewed interactions when you click Send. The `QA Review Status` in the `Case Information` is updated to `Rejected`.
   - `Unknown`—The email interaction is sent back to the review queue or to a review workbin when you click Send.
5. Click Send.

End

Related Information

- Email Tasks Overview
- Inbound Email
- Outbound Email
- QA Review of Email

Handle An SMS or MMS Interaction

[**Modified:** 8.5.110.13, 8.5.121.03]

In this lesson, you will learn how to handle inbound Short Message Service (SMS) interactions and how to check the spelling of your SMS messages before you send your message. This lesson contains the following sections:

- Receiving and Handling an Inbound SMS or MMS Interaction
- Creating an Outbound SMS Interaction
- Spelling Check

SMS is a text-messaging component of voice and internet communication. SMS enables the exchange of text messages between you and a contact through your computer. Typically, a contact will send you SMS from a mobile device, a web interface, or an email client.

By definition, SMS are *short* messages. Workspace supports 160 characters per message. If you attempt to send a message that is longer than the character limit, additional messages, each up to 160 characters, will be sent so as to accommodate your entire message.

Multimedia Message Service (MMS) is a multi-media component of voice and Internet communication. In Workspace, MMS enables you to receive images sent to your contact center from a mobile device, a web interface, or an email client. Images are displayed to you as thumbnails. To view the image full-size, double-click it or right-click it and select **Open** from the context menu. It will open in the default application specified in the Windows operating system. If you have the correct permissions, you can click the **Save** icon or right-click an image and select **Save** from the context menu to save it. [**Added:** 8.5.110.13]

Workspace supports two SMS modes:

- **Page**—You receive a single inbound SMS to which you can send a response or handle in other ways. You can also receive images from a contact.
- **Session**—You receive an inbound SMS that starts a chat session with a contact. SMS Session is non-real-time two-way communication between you and your contact through your computer.

Receiving and Handling an Inbound SMS or MMS Interaction

If you are the selected internal target of an inbound SMS interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it, the SMS Interaction window is displayed. The SMS Interaction window contains information about the interaction and the controls that you need to complete the interaction.

Lesson: Handling an inbound SMS interaction

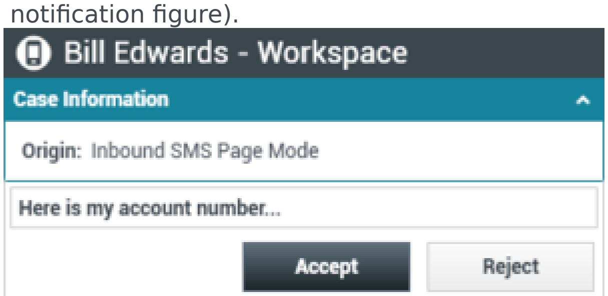
Purpose: To handle an inbound SMS interaction properly.

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).
- You are the internal target of the inbound interaction.

Start

1. When you are the target of in inbound SMS interaction, a preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the SMS Interaction interactive notification figure).



SMS Interaction interactive notification

The Interaction Preview contains a summary of information that pertains to the interaction, including contact information and type of interaction. The Interaction Preview might also contain Case Information, which is part of the case data about the interaction.

> **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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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)

The Interaction Preview informs you of whether the SMS was sent in Page Mode or in Session Mode:

- In Page Mode, you can reply to the message, transfer it, contact an internal target or contact to discuss it, or mark it as Done.
- In Session Mode, if you reply to the interaction, a chat session is started that uses the SMS channel to exchange non-real-time messages.

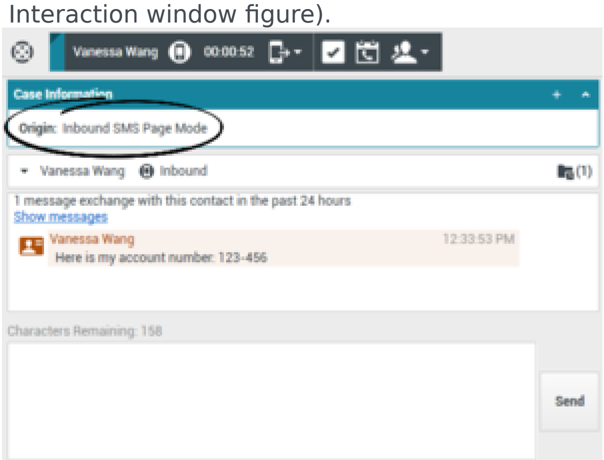
If your account is configured for auto-answer, the Interaction Preview is not displayed and the message is answered automatically unless your account is configured to enable you to preview the case information before the interaction is auto-answered. In this case, when you receive an auto-answer interaction, the Interaction Preview is displayed on your desktop. A timer that counts down the number of seconds until you are connected to the contact is displayed in the **Accept** button (refer to the following figure). You can click **Accept** before the timer runs out or wait for the timer to run out. The **Reject** button might also be displayed if your administrator wants you to have the option of rejecting an interaction before it is auto-answered.[**Added:** 8.5.105.12]

You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:

- Click `Accept` to display the interaction.

- Click `Reject` to return the interaction to the queue.
- Do nothing. The interaction will time out and be redirected.

2. If you accept the interaction, the inbound SMS Interaction window is displayed (see the SMS Page Mode Interaction window figure).



SMS Page Mode Interaction window

The Inbound SMS Interaction window provides the following functionality:

- Read messages from the contact in the message-transcript area of the SMS Interaction window.

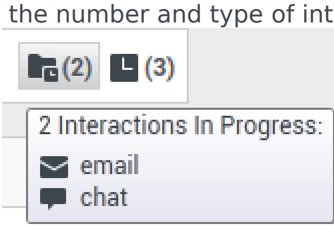
> ## Tip
> Sometimes URLs (links to websites) are sent to you by a contact. URLs in the SMS transcript are always displayed as the actual address. Contacts cannot send you a disguised URL in an attempt to direct you to a malicious website. You will be able to read the URL before clicking on it. If you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

- Compose a message/response. The message-transcript area of the SMS Interaction window contains color-coded, time-stamped message lines from your company's system, as well as the messages that are sent by the contact (see the SMS Page Mode Interaction window figure). If the interaction is in Session Mode, your replies are also displayed. A different color is designated for each message type. The colors are defined by your system administrator.
- Check the spelling of your message/response (see Lesson: Using Spelling Check to find potentially misspelled words in an SMS message).
- Send a message/response.
- Call or email the contact if the relevant information is available in the contact database.
- Transfer the interaction (see Step 7).
- Mark the interaction as Done.
- Set a disposition code for the interaction.
- Add a note to the interaction.
- View and edit Case Information for the current interaction.
- Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as

customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.

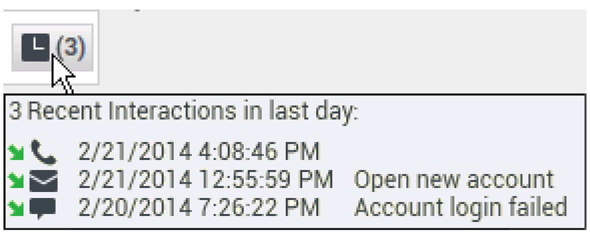
- View and manage contact history. See Managing Contact History.
- View and manage contact information. See Lesson: Finding and viewing an interaction in the contact database.
- Your account might be configured to let you assign an interaction with an unknown contact to a known contact in the contact database by using the Manual Contact Assignment feature.

3. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see the Dynamic Contact History Matrix, displaying the number and type of interactions in progress figure). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.



Dynamic Contact History Matrix, displaying the number and type of interactions in progress

Your account might be configured to notify you if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Recent interactions matrix displaying the list of interactions with the current contact within the last day figure). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



Recent interactions matrix displaying the list of interactions with the current contact within the last day

4. To reply to your contact, enter a message in the message area, and then click Send.

   Your message is displayed to the contact on the SMS device that the contact is using to communicate with you.

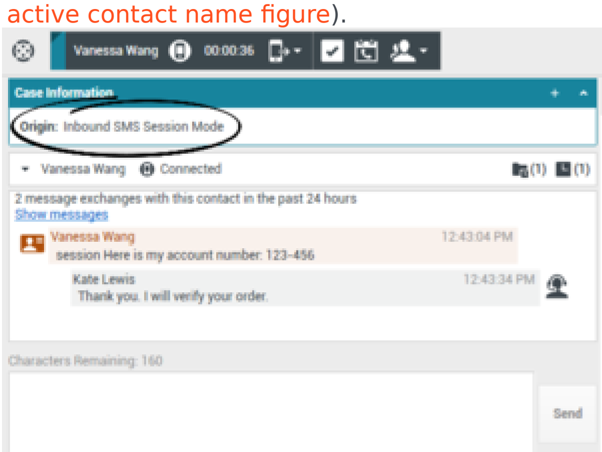
   If the interaction is in **Page Mode**, after you click Send, the interaction window is closed and the interaction is automatically marked as Done, unless your account is configured for you to set a disposition code before you close an interaction window (see Assigning Disposition Codes)—go to Step 8.

   If the interaction is in **Session Mode**, your message is also added to the transcript area of the SMS Interaction window. After you click Send, the SMS Interaction window is minimized. You can restore the window in two ways:

   - By selecting the interaction from the Microsoft Windows taskbar
   - By clicking it in the Interaction Bar at the bottom of the Main Window (refer to Lesson: Using The Interaction Bar for information about using the Interaction Bar)

5. In SMS Session Mode, messages that are sent by your contact are displayed together with your messages in the message-transcript area (see the SMS Session Interaction window Case Information, Contact Action area, toolbar, and message area figure). While you are interacting with your contact, you can use the following functionality in the SMS Interaction window:

- Use the Note to attach a note to the interaction history. See Managing Contact History.
- View and edit Case Information for the current interaction.
- View and manage contact history. See Managing Contact History
- View and manage contact information. See Lesson: Finding and viewing an interaction in the contact database
- 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.
- View and use the Standard Response Library to insert a standard response into your reply message. See Inserting a Standard Response into an Email Interaction.
- Call the sender by clicking the `Action` menu drop-down list that is displayed next to the contact name (see the New E-Mail option in the Action menu drop-down list that is displayed next to an active contact name figure).



SMS Session Interaction window Case Information, Contact Action area, toolbar, and message area

6. If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:
    - Instant-transfer the SMS to another internal target. See Lesson: Starting an instant SMS transfer).
    - Start a consultation with another party:
        - Start an Instant Messaging consultation. See Lesson: Initiating an Instant Messaging session.
        - Start a Voice consultation. See Starting a Voice Conference.
7. When you are finished interacting with your contact, click Done to stop the current SMS interaction.
    - The transcript is saved in the contact history and the SMS Interaction window is closed.
    - Set a disposition code. See Assigning Disposition Codes.

Warning

SMS sessions are configured to expire if no messages are sent or received within a certain interval that is defined by your administrator. Click Done to close the SMS Interaction window after time out occurs.

End

Lesson: Handling an inbound MMS interaction

[**Added:** 8.5.110.13]

Purpose: To handle an inbound MMS interaction properly.

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).
- You are the internal target of the inbound interaction.

Start

1. When you are the target of in inbound MMS interaction, a preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view.

   The Interaction Preview contains a summary of information that pertains to the interaction, including contact information and type of interaction. The Interaction Preview might also contain Case Information, which is part of the case data about the interaction.

   > 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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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)

   MMS are sent in Page Mode. You can reply to the message, transfer it, contact an internal target or contact to discuss it, or mark it as Done.

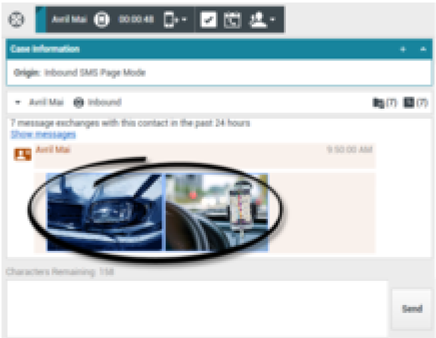
   If your account is configured for auto-answer, the Interaction Preview is not displayed and the message is answered automatically unless your account is configured to enable you to preview the case information before the interaction is auto-answered. In this case, when you receive an auto-answer interaction, the Interaction Preview is displayed on your desktop. A timer that counts down the number of seconds until you are connected to the contact is displayed in the **Accept** button (refer to the following figure). You can click **Accept** before the timer runs out or wait for the timer to run out. The **Reject** button might also be displayed if your administrator wants you to have the option of rejecting an interaction before it is auto-answered.[**Added:** 8.5.105.12]

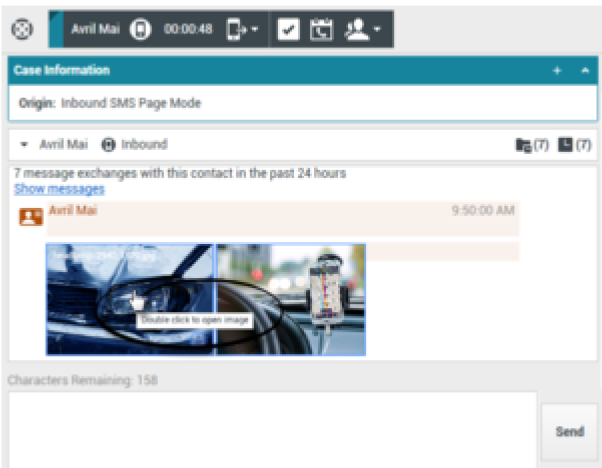
   You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:

   - Click `Accept` to display the interaction.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will time out and be redirected.

2. If you accept the interaction, the inbound MMS Interaction window is displayed (see the MMS Interaction window figure).


MMS Interaction window

To view an image, double-click the image thumbnail or right-click the image thumbnail and select **Open** from the context menu to open the image in the default image viewing application on your workstation.



MMS can be opened full-size in your default image viewing application

The Inbound MMS Interaction window provides the following functionality:

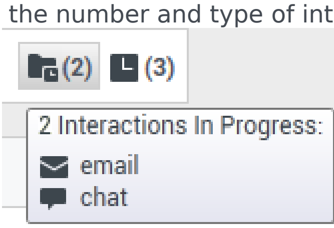
- Read messages from the contact in the message-transcript area of the SMS Interaction window.

> ## Tip
> Sometimes URLs (links to websites) are sent to you by a contact. URLs in the SMS 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 see the address.

- Compose a message/response.
- Check the spelling of your message/response (see Lesson: Using Spelling Check to find potentially misspelled words in an SMS message).
- Send a message/response. The message-transcript area of the MMS Interaction window contains color-coded, time-stamped message lines from your company's system, as well as the messages that are sent by the contact (see the SMS Page Mode Interaction window figure). A different color is designated for each message type. The colors are defined by your system administrator.
- Save the image file (if you have the correct permissions).

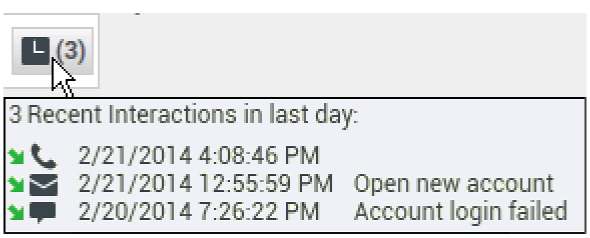
- Call or email the contact if the relevant information is available in the contact database.
- Transfer the interaction (see Step 6).
- Mark the interaction as Done.
- Set a disposition code for the interaction.
- Add a note to the interaction.
- View and edit Case Information for the current interaction.
- Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.
- View and manage contact history. See Managing Contact History.
- View and manage contact information. See Lesson: Finding and viewing an interaction in the contact database.
- 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.

3. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see the Dynamic Contact History Matrix, displaying the number and type of interactions in progress figure). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.



Dynamic Contact History Matrix, displaying the number and type of interactions in progress

Your account might be configured to notify you if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Recent interactions matrix displaying the list of interactions with the current contact within the last day figure). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



Recent interactions matrix displaying the list of interactions with the current contact within the last day

4. To reply to your contact, enter a message in the message area, and then click Send.

Your message is displayed to the contact on the SMS device that the contact is using to communicate with you.

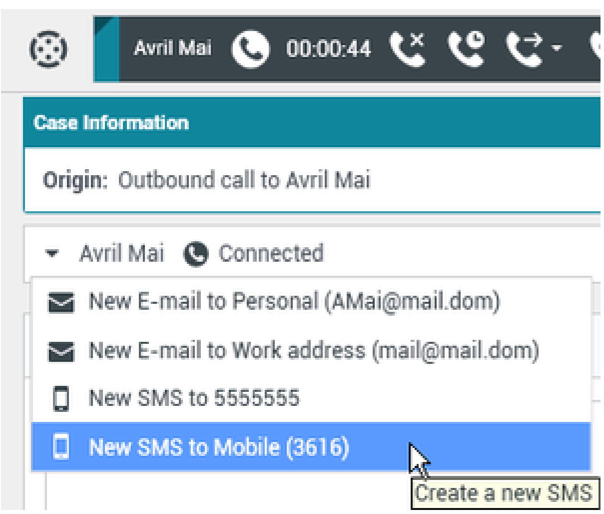
After you click Send, the interaction window is closed and the interaction is automatically marked as Done, unless your account is configured for you to set a disposition code before you close an interaction window (see Assigning Disposition Codes)—go to Step 7.

5. If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:
    - Instant-transfer the MMS to another internal target. See Lesson: Starting an instant SMS transfer). Transferring an MMS is the same as transferring an SMS.
    - Start a consultation with another party:
        - Start an Instant Messaging consultation. See Lesson: Initiating an Instant Messaging session.
        - Start a Voice consultation. See Starting a Voice Conference.
6. When you are finished interacting with your contact, click Done to stop the current SMS interaction.
    - The transcript is saved in the contact history and the MMS Interaction window is closed.
    - Set a disposition code. See Assigning Disposition Codes.

End

Creating an Outbound SMS Interaction

Workspace enables you to send an SMS to any device or system that is capable of receiving an interaction in this format. You can use the `Contact Action` menu of the Contact Directory or an active interaction to open the SMS Interaction window and create a new SMS interaction (see the Contact Action menu in an active-interaction window figure).



Contact Action menu in an active-interaction window

Unlike inbound SMS interactions, outbound SMS interactions support only Page Mode interactions. In Page Mode, you send a single outbound SMS to your contact. You cannot send outbound MMS interactions.

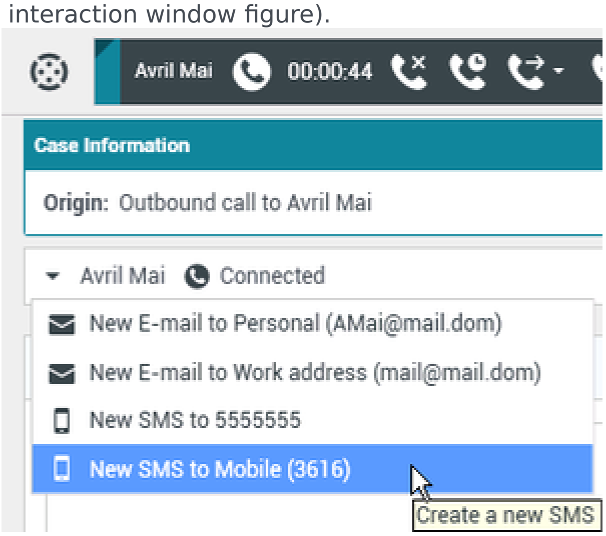
Lesson: Creating an outbound SMS interaction

Purpose: To create an outbound SMS interaction properly.

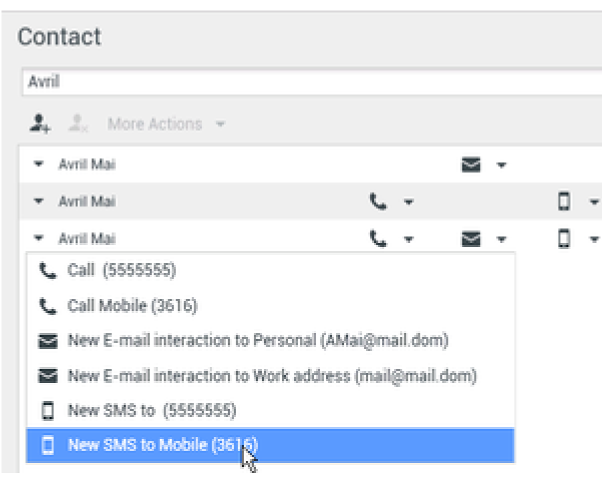
Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- Your role enables you to send new SMS.

Start

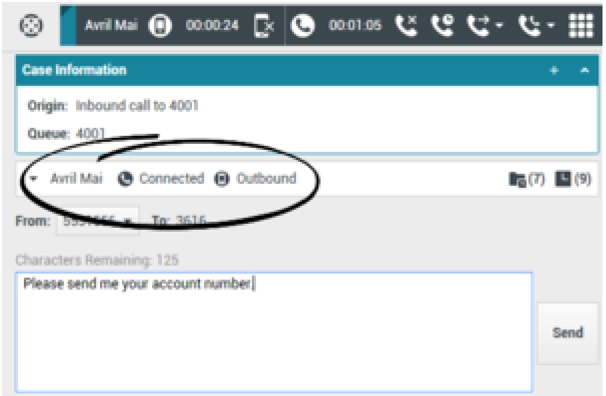
1. From an active interaction, open the `Contact Action` menu (see the Contact Action menu in an active-interaction window figure).


Contact Action menu in an active-interaction window

Alternately, from the Contact Directory, find a contact (Lesson: Using the Team Communicator feature to find a contact), and then open the `Contact Action` menu (see the Contact Action menu in the Contact Directory figure).


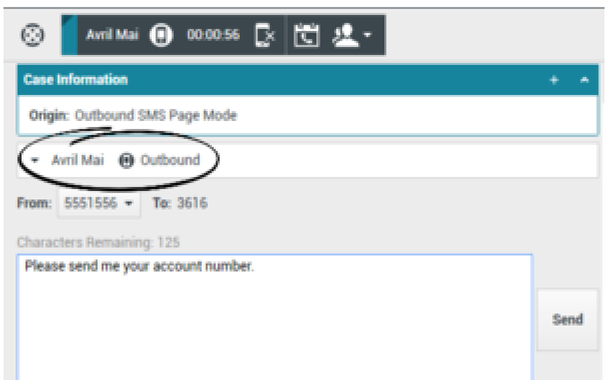
Lesson: Using the Team Communicator feature to find a contact

2. Select New SMS.
3. If you started a new SMS from an active interaction, the SMS view is displayed in the interaction window that is displayed below the active interaction (see the An SMS interaction, blended into an active email interaction figure).



An SMS interaction, blended into an active email interaction

If you started a new SMS from the Contact Directory, a new SMS Interaction window is displayed (see the New SMS Interaction window figure).



New SMS Interaction window

4. To send an SMS interaction (Page Mode), in the SMS text area, enter your message and then click Send. The message is sent to your contact and the SMS view or SMS Interaction window is closed.

End

Spelling Check

You might be enabled to use the Spelling Check functionality. The SMS Interaction window has automatic spelling-check capabilities that enable you to correct misspelled words or add words to your personal dictionary.

Lesson: Using Spelling Check to find potentially misspelled words in an SMS message

Purpose: To verify the spelling of the content of an outbound SMS message.

Prerequisites

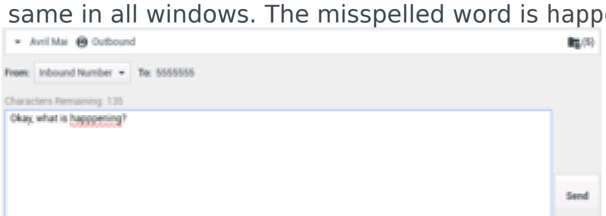
- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have an active SMS interaction (see Receiving and Handling an Inbound SMS Interaction or Creating an Outbound SMS Interaction).

Start

1. Begin to enter text in the message area of an SMS Interaction window (see Lesson: Handling an inbound SMS interaction or Lesson: Creating an outbound SMS interaction).

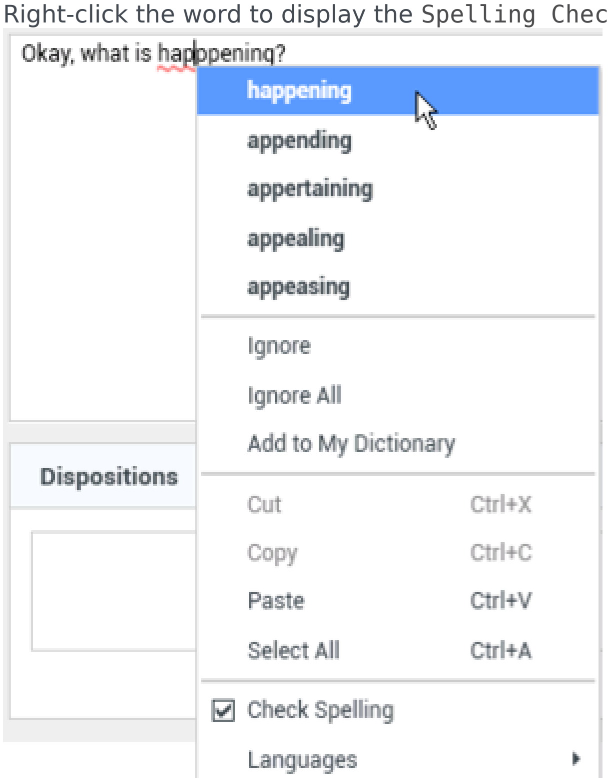
   You can enter text by typing at the insertion point, pasting content from another document, or inserting a standard response (Lesson: Using The Standard Response Library).

2. When Spelling Check is on, words in the message area that are not in the specified dictionary are underlined by a red, wavy line. The SMS message composition area, displaying a misspelled word that is underlined in red figure shows an SMS message that contains a word that is not in the `English (United States)` dictionary (the default dictionary for this user). The behavior of Spelling Check is the same in all windows. The misspelled word is `happening`, which is misspelled as `happppening`.



SMS message composition area, displaying a misspelled word that is underlined in red

3. You can correct the spelling by using one of two methods:
   - Edit the word(s) manually.
   - Right-click the word to display the `Spelling Check` menu.



SMS Interaction window Spelling Check menu

4. If you right-clicked the misspelled word to display the `Spelling Check` menu, you can do one of the following:
   - Select the correct spelling from the list of suggestion (bold text).
   - `Ignore`—Select to ignore this instance of the word that is not in the specified language dictionary.
   - `Ignore All`—Select to ignore all instances of the word that is not in the specified language dictionary for this interaction only.
   - `Add to My Dictionary`—Select to add the spelling to your personal dictionary (not your corporate dictionary).
   - `Spell Checking`—Select to turn the Spelling Check functionality off or on.
   - Languages—Select to open the list of available language dictionaries. You can select a different language dictionary.
5. If you try to send a message that contains misspelled world, 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]

End

Related Information

- SMS and MMS Interactions

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

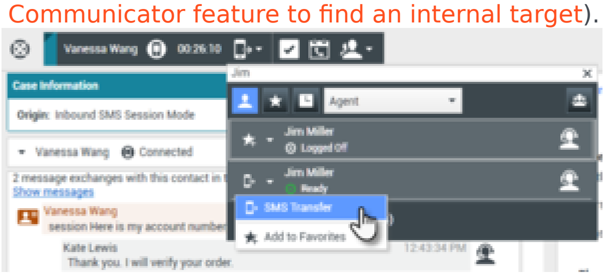
Purpose: To find an internal target (such as an agent, Routing Point, or queue), and transfer the SMS to the internal target.

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

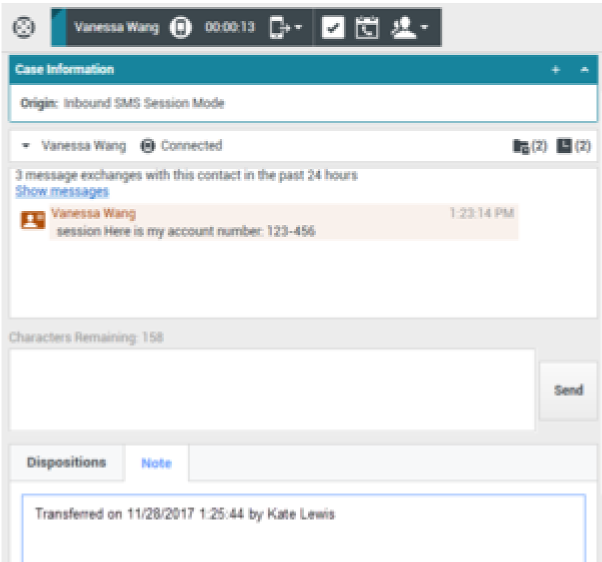
1. In the active SMS Interaction window, click `Transfer` to open the Team Communicator (see the Finding an internal target of an SMS transfer in the active SMS Interaction window figure) to find the internal target to whom you want to transfer the current interaction (see the Lesson: Using the Team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

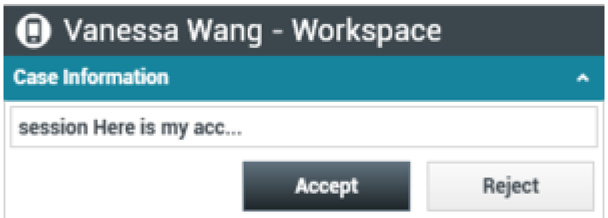
Purpose: To receive a transferred SMS interaction from another agent.

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).

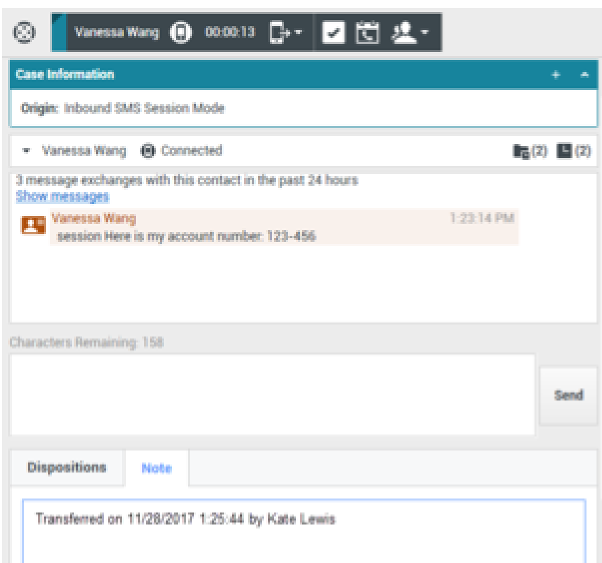


Interaction Preview interactive notification, informing you of a transfer request

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

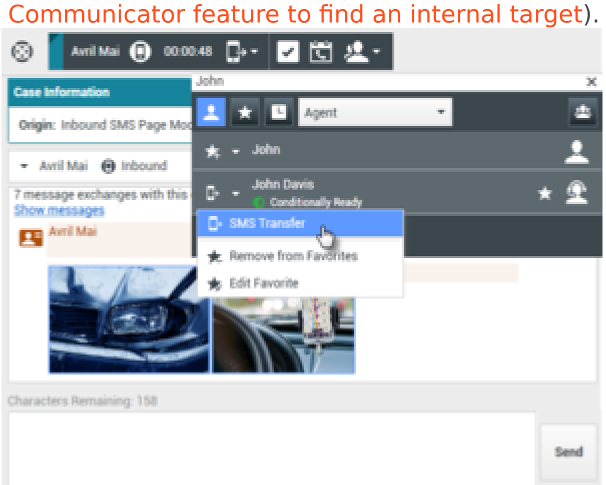
Purpose: To find an internal target (such as an agent, Routing Point, or queue), and transfer an MMS to the internal target.

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

Handle A Facebook Interaction

In this lesson, you will learn how to handle inbound Facebook interactions, how to check the spelling of your messages before you send, and other Facebook-specific functionality. This lesson contains the following sections:

- Receiving and Handling an Inbound Facebook Interaction
- Facebook-Specific Functionality
- Workspace Functionality

About Facebook

Facebook is a social networking service and website. Users must register before using the site, after which they may create a personal profile, add other users as friends, and exchange messages, including automatic notifications, when they update their profile. Businesses can use Facebook to reach their target customers, and choose their audience by location, age and interests. Businesses can also promote their Facebook page or website, use Facebook's "Like" button to increase their advertising influence, and build a community around their business. A plug-in for Workspace enables it to handle Facebook social media interactions. This lesson contains information about how to handle Facebook interactions.

Receiving and Handling an Inbound Facebook Interaction

If you are the selected internal target of an inbound Facebook interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it, the Facebook Interaction window is displayed. The Facebook Interaction window contains information about the interaction and the controls that you need to complete the interaction.

Lesson: Handling an inbound Facebook interaction

Purpose: To handle an inbound Facebook interaction properly.

Prerequisites

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

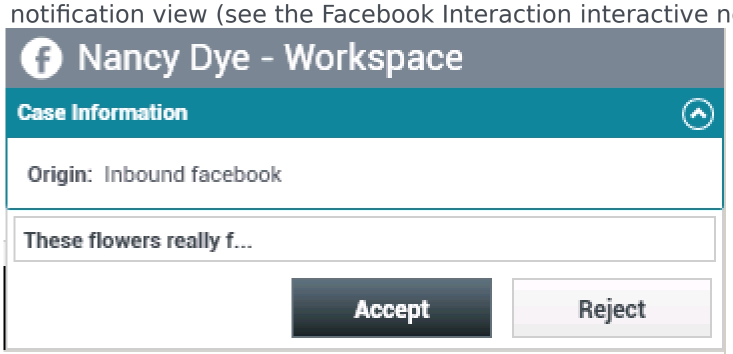
  Note: You can log in and make Ready for the following:

  - Facebook (Session Mode) for replying to facebooksession messages that have not expired
  - Facebook Private Message for replying to all facebooksession messages, including those that have expired

- Facebook for all other Facebook functionality
- You are the internal target of the inbound interaction.

Procedure

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Facebook Interaction interactive notification figure).



Facebook Interaction interactive notification

The Interaction Preview contains a summary of information that pertains to the interaction, including contact information and type of interaction. The Case Information area identifies the interaction as follows:

- `Origin: Inbound Facebook Session Mode`—A facebooksession message, to which you can reply
- `Origin: Inbound Facebook`—All other inbound Facebook interactions

> ## 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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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)

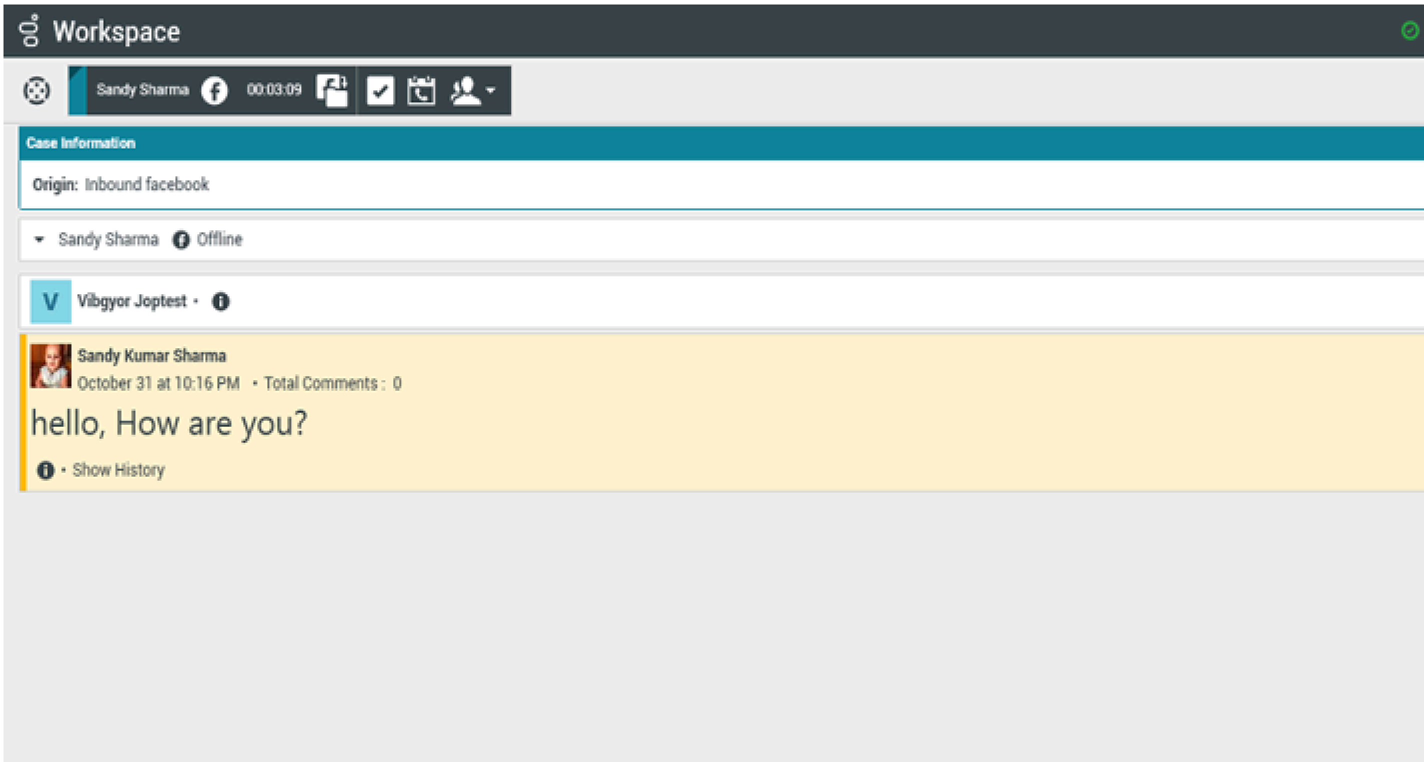
If your account is configured for auto-answer, the Interaction Preview is not displayed and the message is answered automatically unless your account is configured to enable you to preview the case information before the interaction is auto-answered. In this case, when you receive an auto-answer interaction, the Interaction Preview is displayed on your desktop. A timer that counts down the number of seconds until you are connected to the contact is displayed in the **Accept** button (refer to the following figure). You can click **Accept** before the timer runs out or wait for the timer to run out. The **Reject** button might also be displayed if your administrator wants you to have the option of rejecting an interaction before it is auto-answered.[**Added:** 8.5.105.12]

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to display the interaction.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will time out and be redirected.
3. If you accept the interaction, the inbound Facebook Interaction window is displayed. The Facebook Interaction window figure shows the window after clicking the information button to display a user

profile.

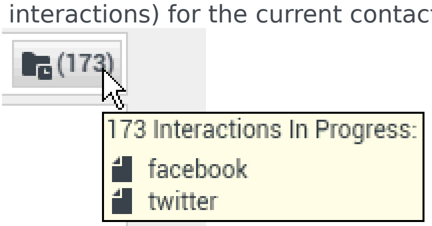
Important

As Facebook posts and comments are not considered as live interactions, the interactions' status is always shown as **Offline** in the Facebook Interaction window.



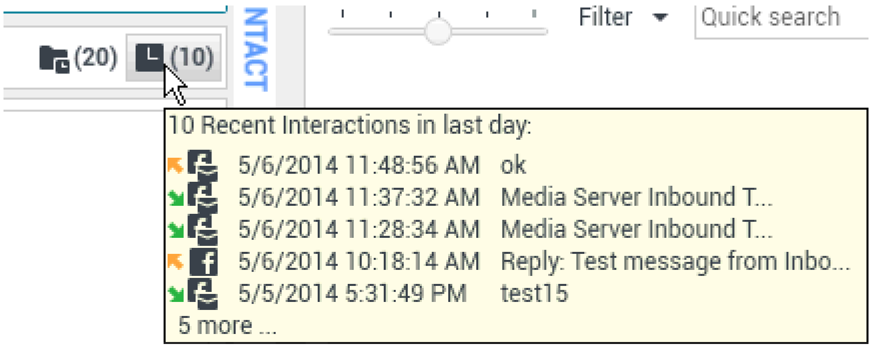
Facebook Interaction window

4. If there are interactions in progress for the current contact, the number of interactions is displayed next to the connection status of the interaction (see the Dynamic Contact History Matrix figure). Place your mouse pointer over the icon to display the number and type of interactions in progress (except voice interactions) for the current contact.



Dynamic Contact History Matrix

You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Recent interactions matrix figure). Place your mouse pointer over the icon to display the number and type of recent interaction(s) for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



Recent Interactions matrix

The original-routed post is on the left margin under the Facebook interaction toolbar. Subsequent comments are indented underneath the original post.

5. To reply to an original post, click `Comment` on the right of the post. A text box drops down.
6. Enter your comment.You can also copy and paste selected text.
7. Right-click and select `Spellchecking`. Correct any spelling errors.
8. When through, click Send. Workspace associates your comment with the post. Your message is displayed to the contact on Facebook.

Lesson: Handling an inbound Facebooksession interaction

You can reply to a facebooksession message from a user (you cannot send new facebooksession message).To do so, you must be logged in to either or both of the special channels Facebook (Session Mode) and Facebook Private Message (both are listed in **Prerequisites** above).

- If the interaction is in the **Connected** status, the reply area is active, enabling you to enter text. When you are done, you can click **Send** in the lower right corner. You can also select Facebook Private Message from the drop-down under the contact's name. You then have a new facebooksession messages area to enter text in.
- If the interaction is in the **Disconnected** status, you can reply only by selecting Facebook Private Message from the pulldown under the contact's name, as described in the previous section.
- If the interaction has been marked Done, you can reply by selecting the interaction in the History, then clicking the **Create a new Facebook Private Message** icon. A message area opens in which you can write your reply.

Channel Dependencies:

- If the message has not timed out, you can reply if you are logged in to either Facebook (Session Mode) or Facebook Private Message.
- If the message has timed out, you must be logged in to Facebook Private Message in order to reply.

Other Actions:

- You can send further facebooksession messages as replies to an inbound facebooksession message. They are threaded with the original inbound facebooksession message as their parent.
- You can move a facebooksession message that you are working on into a workbin. From there you can perform the standard workbin actions (open, move, ...)

- Agents can disconnect a Facebook chat session at any time using the disconnect session button .

Use Case

An agent can open a facebooksession interaction from the interaction queue while the session is kept active. The following use case explains how the interaction must be handled.

> **Important**
> The interaction must be in the **Facebook Agent Queue** instead of the **Facebook Inbound Queue**, **Facebook Classify Screen Queue**, or other intermediate queues. This indicates that all the related business processes have been processed and the interaction is ready to be handled by any available agent.

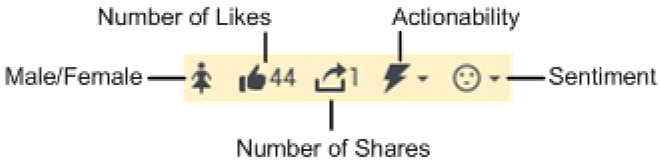
1. A customer sends a public comment to your business as a reply to an existing post or through a new post.
2. The system routes the customer's comment to you.
3. You review the comment and decide it is best handled through a Facebook Private Message so you request the customer connect with you in this way.
4. The system routes your comment to the customer.
5. The customer sends a Facebook Private Message to your business.
6. The system adds the customer's message to the interaction queue but has not yet routed it to any of the available agents.
7. You open the interaction from the interaction queue, and the system now enables you to access the Facebook private message menu (it looks similar to a disconnected chat session).
8. You send your private message as an answer to the customer's private message and then mark the interaction as done.

Next Steps

- You may wish to use some of the Facebook-Specific Functionality described below. For example, you may wish to update the Facebook classification. You may also wish to use some of the features in described in Workspace Functionality. When you are finished, click Done to stop the current interaction.The information is saved in the contact history and the Facebook Interaction window is closed.

Facebook-Specific Functionality

The Facebook Interaction window provides some Facebook-specific functionality.



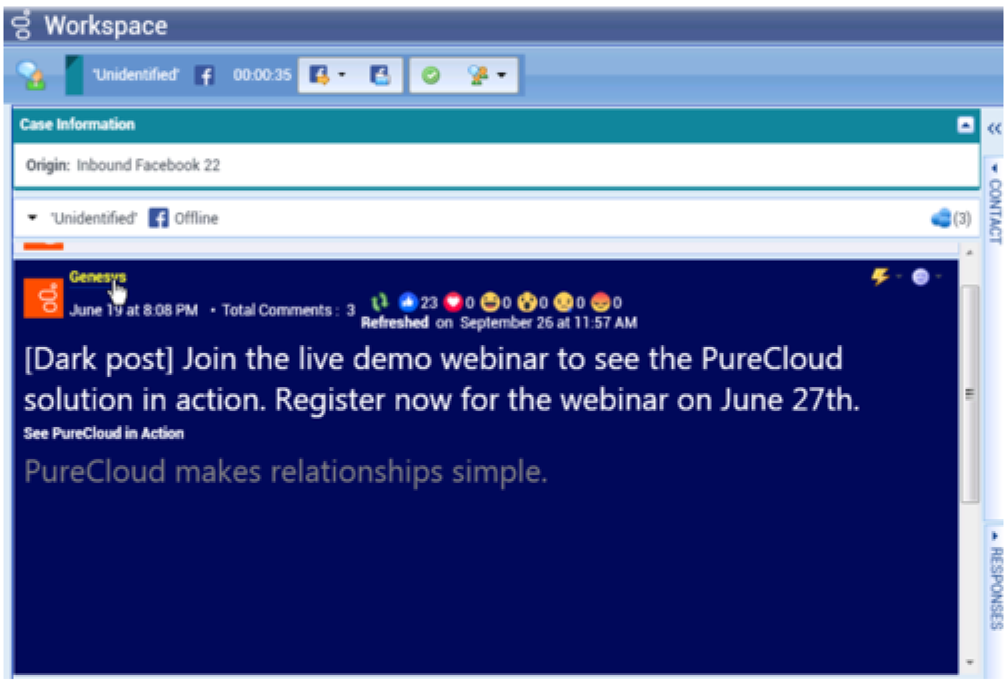
Icons for Facebook-Specific Functionality

You can:

- Display Facebook-user profile information. Click `Show Info` to open a user profile tab. You can also click the user name to open the Facebook page with user profile information. Prior to release 8.5.3 of the Social Media Plugin, the author's gender also appeared in the user profile and was displayed as an icon (see the Icons for Facebook-Specific Functionality figure).
- Display the number of Facebook *likes*. The number next to the thumbs-up icon indicates the number of likes.
- Expand or collapse the Comments view. You can expand the comments by clicking `View`. After clicking `View, Hide` appears so you can close up the comment. You can also select `Expand All` or `Collapse All` in the Comments view to view/hide all comments at once.
- View the total number of comments and show more comments. Click the `Show Info` button to open the user profile then click the `Post` tab to view the total comments count. Total comments also appears above the original post. Your administrator configures the number of comments to display per page. If the number of comments exceeds the configured number, `Show more` appears. Click `Show more` to view additional comments.
- Display the Actionability and Sentiment of the Facebook interaction. When a Facebook interaction arrives, you can view Actionability and Sentiment icons (see the Buttons and Icons for Facebook-Specific Functionality figure), which could have one of the following values or be undeclared:
  - Actionability—Can be actionable, not actionable, or undeclared
  - Sentiment—Can be Positive, Negative, Neutral or undeclared
- View the Facebook reactions and the reactions count for each post or comment in Facebook. The reactions count gets refreshed when receiving the interaction. You can also manually refresh the reaction count using the **Refresh** button.


- Hide a post or comment on the brand's Facebook page by clicking **Hide Post** or reveal a hidden post by clicking **Unhide Post**. This feature lets agents hide posts or comments on a brand's Facebook page instead of deleting them and later show the posts, if required. A hidden post or comment is not visible to viewers of the page. This feature is available for posts and comments created by the page administrators, and for comments created by visitors; it is unavailable for visitors' posts.

Dark posts are colored dark blue and are indicated by the **[Dark post]** tag.



Actionable Facebook posts are colored yellow and non-actionable posts are colored gray. Facebook comments are automatically expanded and colored yellow if they are actionable, and collapsed and colored gray if they are non-actionable. Each Facebook comment has its own Actionability and Sentiment icon, which can be updated if necessary. Actionability and Sentiment are based on the classification and screening results obtained from Genesys Knowledge Management.

- Update the Actionability and Sentiment of the Facebook classification. While you are processing the interaction, you have the option to change the value of the corresponding Actionability and Sentiment key by clicking the related icon and then choosing the correct value.
- Change visibility of posts. The row of icons near the top of the interaction includes a visibility icon, which can be one of the following: Highlighted, Hidden, Normal.Change the visibility by clicking the icon and selecting a different one from the dropdown.
- "Like" a post or comment by clicking the **Like** button; "unlike" a post or comment by clicking the **Unlike** button

- Reply to the original routed Facebook post including checking the spelling (see Lesson: Handling an inbound Facebook interaction).
- Reply to a Facebook comment. Subsequent comments are indented underneath the original post. Click the applicable comment, enter your reply (you can cut and paste text), have your reply spell-checked, and click `Send`.

Tip

Once the interaction is moved to a workbin or marked Done, it no longer appears under the interaction it is replying to (you can find it on the History tab, though). To make your replies to posts or comments appear under the original interaction, click **Show History** next to the **Show Info** button.

- Create a new post: From the Agent Icon or Gadget drop-down list,
  1. Select `Post Update`, then `Facebook`. A new message window is displayed.
  2. Select an account from the drop-down list.
- Attach an image or a video to outbound public posts and comments. To attach a file, click the **Send File** icon , then use the resulting dialog box to navigate to the desired file. This icon appears below the text box. The following file formats are supported (file size must be less than 20 MB) for inbound and outbound messages:
  - Video : MP4, AVI, 3GP
  - Image : JPG, JPEG, PNG, BMP, GIF, TIFF
- Attach an image, video, or document to outbound private messages. To attach a file, click the **Send File** icon , then use the resulting dialog box to navigate to the desired file. This icon appears below the text box. The following file formats are supported (file size must be less than 25 MB) for inbound and outbound messages:
  - Audio : MP3, AMR
  - Video : MP4, AVI, 3GP
  - Image : JPG, JPEG, PNG, BMP, GIF, TIFF
  - Other : PDF, DOC, DOCX, XLS, XLSX, HTML, TXT

Important

Facebook Messenger no longer supports the file formats RAR and ZIP in inbound and outbound attachments.

- Edit an outbound post or comment: Open the item from the History and click the **Edit** button.

Notes:

- When the text box in the interaction window is active, the `Done`, `Start a Consultation`, and `Transfer` buttons are enabled, and remain enabled until the session is over.

- Facebook Session Mode sessions are configured to expire if no messages are sent or received within a certain interval that is defined by your administrator. If Social Messaging Server exits, the agent receives a system message that the Facebook session has expired. After timeout occurs you can still do any of the following:
    - Place the interaction in a workbin.
    - Reply by sending a new outbound Facebook Private Message.
    - Click `Done` to close the Interaction window.
- To delete an outbound interaction, click the Delete button  on the toolbar at the top of the interaction window.
- To delete a post or a comment, click the Delete button. The post or comment can be deleted if this action is allowed by the author of the post.

Workspace Functionality

While you are interacting with your contact, you can use the following general Workspace functionality in the Facebook Interaction window:

> **Tip**
> Some of the procedures and tasks below are media-specific, but you can apply the information when working with Facebook interactions.

- Use the Note to attach a note to the interaction history. See Managing Contact History.
- View Case Information for the current interaction.
- View and manage contact history. See Managing Contact History
- View and manage contact information. See Lesson: Finding and viewing an interaction in the contact database.
- 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.
- Use the Standard Response Library for pre-written text for replies and comments.Click the vertical `Responses` button in the middle of the window to open the library. You can search by keywords or open folders and view response text. When you click `Comment`, an additional icon with a plus sign is displayed. Click this icon to add the standard response content to the reply message. Also see Lesson: Using The Standard Response Library.
- Cross over into another media channel. If, as an agent, you learn other contact information (not Facebook-specific), such as a contact's phone number or email address, you can manually entered this on the `Information` tab. The corresponding choice for other media channels is then available when you click the `Party Action` menu that is next to the name of the contact. You can reply by using a voice call, an email, an SMS or any other supported media channel for a Facebook contact. If a channel is not configured or if the contact information for this channel is absent, `No possible action` is displayed.

- If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:
    - Instant-transfer the interaction to another internal target. See Lesson: Starting an instant SMS transfer), which is similar to the procedure for Facebook.
    - Start an Instant Messaging consultation. See Lesson: Initiating an Instant Messaging session.
    - Start a Voice consultation. See Starting a Voice Consultation.
    - Set a disposition code. See Assigning Disposition Codes.
- When you are finished interacting with your contact, click Done to stop the current interaction. The transcript is saved in the contact history and the Facebook Interaction window is closed.

Related Information

- Facebook Interactions

Handle A Twitter Interaction

In this lesson, you will learn how to handle inbound Twitter interactions (Tweets), how to check the spelling of your messages before you send, and other Twitter-specific functionality. This lesson contains the following sections:

- Receiving and Handling an Inbound Twitter Interaction
- Twitter-Specific Functionality
- Workspace Functionality

About Twitter

Twitter is an online social networking service and micro-blogging service that enables its users to send and read text-based posts of up to 280 characters, known as Tweets. It has been described as "the SMS of the Internet." These messages are posted to the user's Twitter profile or their blog, sent to their followers, and are searchable on Twitter search. Twitter also has a suite of advertising products to help brands and businesses promote their content within the Twitter experience. Businesses can use Tweets to reach users while they search for their interests on Twitter.

Receiving and Handling an Inbound Twitter Interaction

If you are the selected internal target of an inbound Twitter interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it, the Twitter Interaction window is displayed. The Twitter Interaction window contains information about the interaction and the controls that you need to complete the interaction.

Lesson: Handling an inbound Twitter interaction

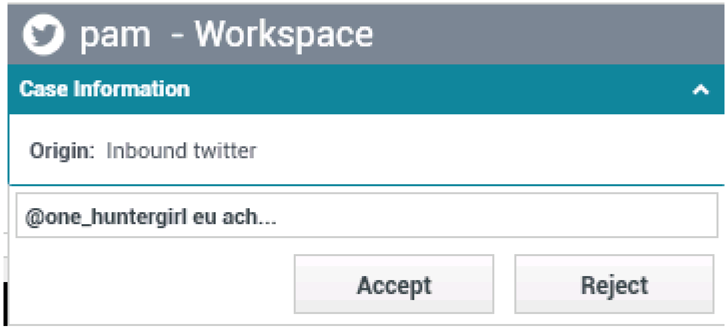
Purpose: To handle an inbound Twitter interaction properly.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- Your status is Ready for the Twitter-media channel (see Lesson: Going Ready in the Workspace Main window).
- You are the internal target of the inbound interaction.

Start

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see Figure—Twitter Interaction Notification).



Twitter Interaction Notification

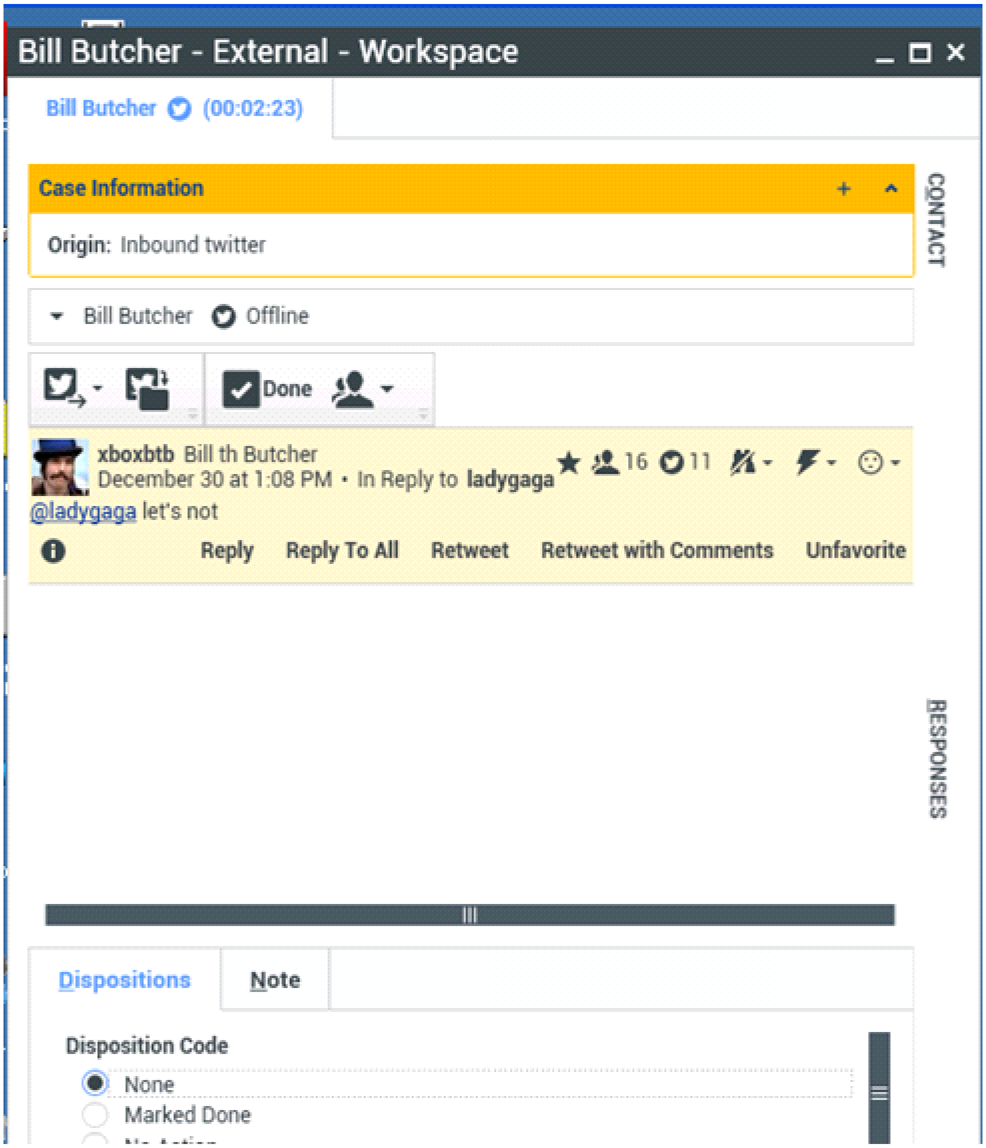
The Interaction Preview contains a summary of information that pertains to the interaction, including contact information and type of interaction. The Interaction Preview might also contain Case Information, which is part of the case data about the interaction.

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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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)

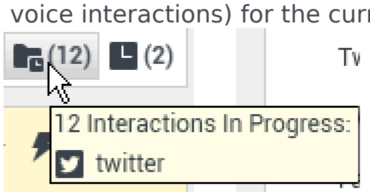
If your account is configured for auto-answer, the Interaction Preview is not displayed and the message is answered automatically unless your account is configured to enable you to preview the case information before the interaction is auto-answered. In this case, when you receive an auto-answer interaction, the Interaction Preview is displayed on your desktop. A timer that counts down the number of seconds until you are connected to the contact is displayed in the **Accept** button (refer to the following figure). You can click **Accept** before the timer runs out or wait for the timer to run out. The **Reject** button might also be displayed if your administrator wants you to have the option of rejecting an interaction before it is auto-answered.[**Added:** 8.5.105.12]

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to display the interaction.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will time out and be redirected.
3. If you accept the interaction, the inbound Twitter Interaction window is displayed, as shown in the Figure—Twitter Interaction Window.



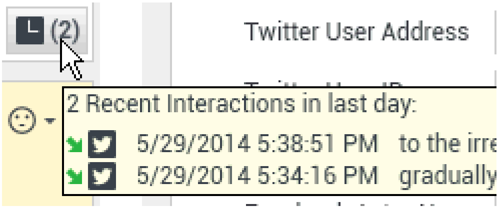
Twitter Interaction Window

4. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see Figure—Dynamic Contact History Matrix). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.



Dynamic Contact History Matrix

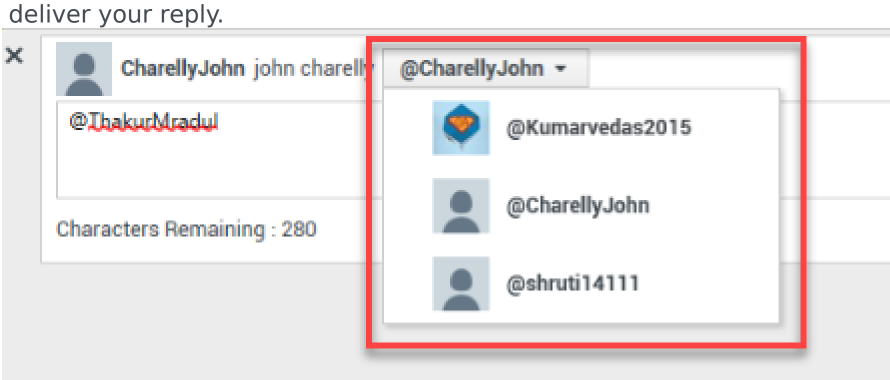
You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see Figure—Recent Interactions Matrix). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



Recent Interactions Matrix

The original-routed Tweet appears in the left margin under the Twitter interaction toolbar.

5. To reply to the Tweet, just click `Reply`. A drop-down menu is displayed.
6. Select one of the following:
   - `Reply`--Reply to a Tweet by using the @username prefix, which is automatically inserted
   - `Reply to All`--Reply with a status Tweet that includes mentions. Reply to multiple persons by using @username prefix
   - `Send Direct Message`--When the Twitter message author is a follower, you can send a direct message to the author as a form of reply
   - `Retweet`--Re-post someone else's Tweet without comments
   - `Retweet with Comments`--Re-post someone else's Tweet with comments
7. Select a Twitter handle from which you want to send your reply to the Twitter user. If you do not change the Twitter handle, the default handle that is configured in Hub channel configuration page is used to deliver your reply.



Twitter Reply Handle

Important

This feature is available for public Tweets only. Twitter does not allow this function for Twitter direct messages due to security reasons.

8. Enter your reply or retweet. You can copy and paste selected text.

Important

> If the original inbound Tweet contains a Twitter mention and the outbound Tweet puts the mention at the beginning of the message, the mention does not count against the 280-character limit. However, if Twitter mentions are present within the reply message, they contribute to the character count.
>
> For example, if your outbound message is **@username Hi, please drop us a private message**, then **@username** is excluded from the character count. If you enter **Hi @username, please drop us a private message** in the reply text area, **@username** counts against the character limit.

9. When finished, click Send. Your message is displayed to the contact on Twitter. Your message is also added to the transcript area of the Twitter Interaction window.

End

Next Steps

- You may wish to use some of the Twitter-Specific Functionality described below. For example, you may wish to update the Twitter classification or follow/unfollow the Twitter-user. You may also wish to use some of the features in described in Workspace Functionality. When you are finished, click `Done` to stop the current interaction.The information is saved in the contact history and the Twitter Interaction window is closed.

New Unsolicited Tweets/Messages

Workspace enables you to create and send outbound unsolicited messages to a Twitter user. There are three types: new timeline tweet, tweet with mention, and direct message.

In addition to the actions described below for each type individually, the following actions are common to all three:

New Timeline Tweet

This message goes to all followers of the channel. From the Agent Icon drop-down or Gadget drop-down,

1. Select `Post Update`, then `Twitter`. A new message window is displayed.
2. Select a timeline from the drop-down list.

You can attach an image to the new tweet.

Tweet with Mention

This message goes to a selected contact.

1. Click the downward triangle/arrow to the left of the contact name, then select Twitter Message. You can

do this from the main Workspace window (see Figure—Send from Main Window below) or the interaction window (Figure—Send from Interaction Window below).

center|Send from Main Window]		center|Send from Interaction Window]

2. In the resulting new message window, select a `From` account.
3. In the new message window, ensure that `Mention` displays as the title of the drop-down list directly above the message area, as shown in the Figure—Mention in Drop-down below (if the message recipient is a follower of your channel's account, the drop-down is titled `Direct`): frame|center|Mention in Drop-down The new message begins with an @<username> mention.

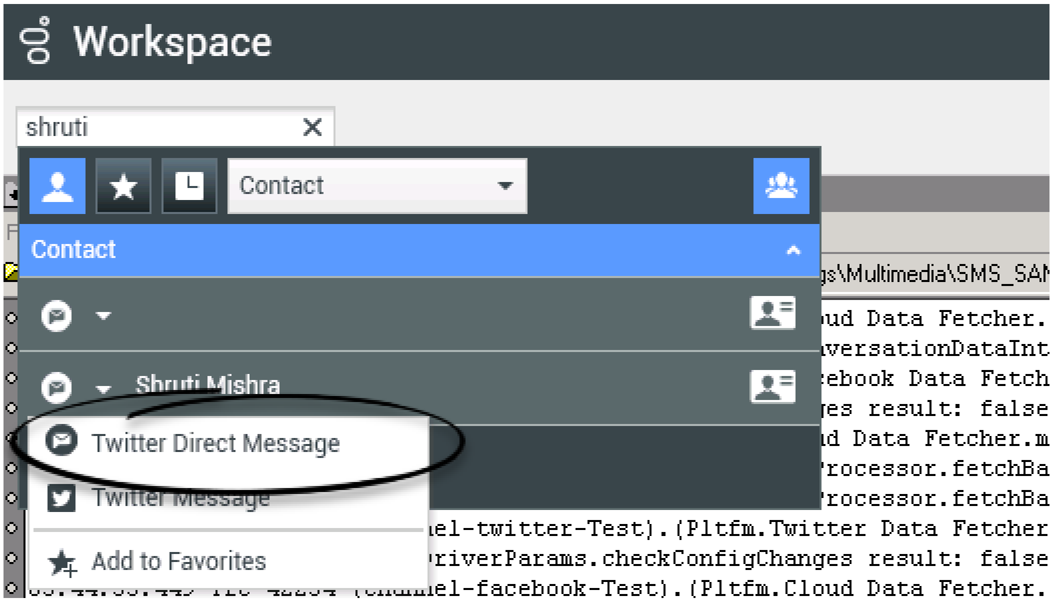
Twitter Direct Message

You can send and receive a direct message using Twitter Direct. The contact must be a follower of yours and your direct messages are between you and the selected contact only. No one else can see them.

Direct message interactions from Twitter are displayed on the interaction window via the Twitter Direct button:

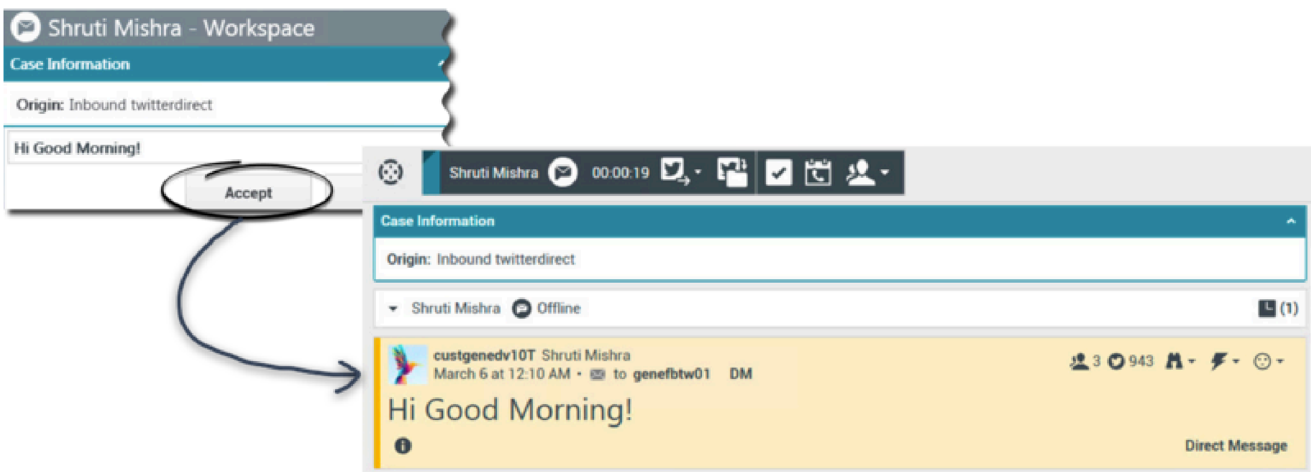
Sending a Direct Message

You can send a direct message to a contact (this is distinct from the direct message that you can send as a reply). From the main Workspace window or the interaction window, click the downward triangle/arrow to the left of the contact name, then select **Twitter Direct Message**:



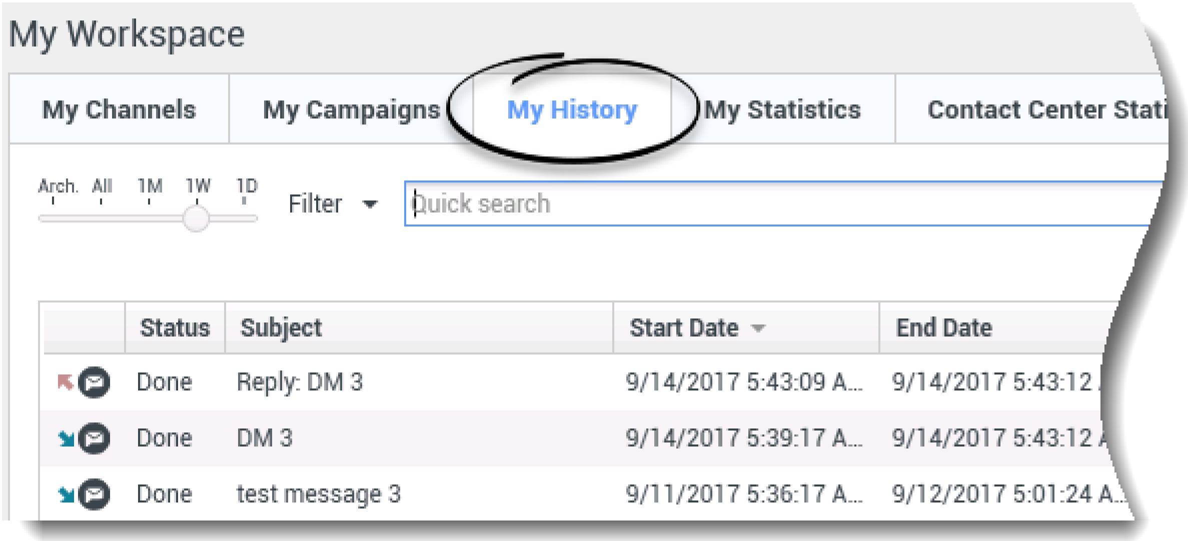
Accepting an Incoming Direct Message

From the main Workspace window, click **Accept** on the Twitter Direct Message popup, and the interaction window opens:



Viewing your Direct Message History

You can view your message history, by clicking **My Workspace > My History** from the main Workspace window. From this window you can do a **Quick search**, **Filter** your results, or use the slider to search within a specific timeline.



Attach an Image

You can attach an image to a new unsolicited Tweet, a reply, a Reply to All, a new Direct Message, or a Retweet with Comments. (You cannot attach an image to a retweet).

To attach an image, click the **Add Picture** icon, then use the resulting dialog box to navigate to the desired file.

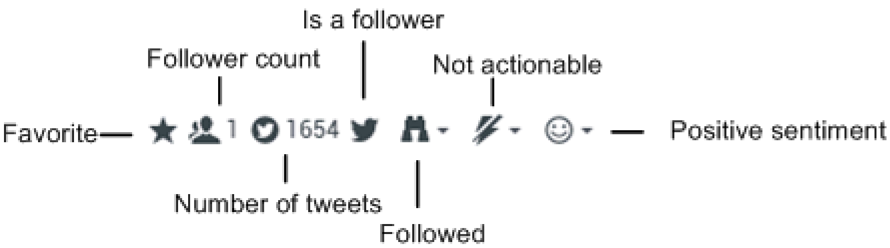
This icon appears below the text box in replies and Retweets with Comments; it appears below the text box in unsolicited Tweets.

The following image formats are supported:

- JPEG
- JPG
- PNG
- GIF

Twitter-Specific Functionality

The Twitter Interaction window provides some Twitter-specific functionality.



Icons for Twitter-Specific Functionality

You can:

- Display Twitter-user profile information. Click `Show Info` to display the user profile information. You can also click the user name to open the Twitter page that contains user profile information (see the Figure—Buttons and Icons for Twitter-Specific Functionality).
- Display the number of Twitter-user Tweets. The number after the Statuses Count icon indicates the number of user Tweets (see the Buttons and Icons for Twitter-Specific Functionality figure).
- Display the Actionability and Sentiment of the Twitter interaction. When a Twitter interaction arrives, you can view Actionability and Sentiment icons (see the Buttons and Icons for Twitter-Specific Functionality figure), which could have one of the following values or be undeclared:
  - Actionability—Can be actionable, not actionable, or undeclared.
  - Sentiment—Can be Positive, Negative, Neutral, or undeclared.

Actionable Tweets are colored yellow and non-actionable Tweets are colored gray. Actionability and Sentiment are based on the classification and screening results obtained from Genesys Knowledge Management.

- Update the Actionability and Sentiment of the Twitter interaction. While processing the interaction, you have the option to change the value of the corresponding Actionability and Sentiment key by clicking the related icon and then choosing the correct value.
- Display the Followers Count. The number after the Follower Count icon (see the Buttons and Icons for Twitter-Specific Functionality figure) indicates the number of Twitter users following this account.
- Display the designation that the user is a Follower. The Follower icon (see the Buttons and Icons for Twitter-Specific Functionality figure) indicates that the user is a Twitter follower.
- Display an attached image by clicking the preview of the image.
- Designate a tweet as Favorite by clicking the **Favorite** button. The tweet then appears with a star icon. You can also unfavorite a tweet.
- Follow/Unfollow a Twitter user. You can become or stop being a follower of an author of the Twitter message. Click the Followed button to unfollow this account (see the Buttons and Icons for Twitter-Specific Functionality figure). A menu appears where you can select Unfollow. The button changes to Not Followed (see the Buttons and Icons for Twitter-Specific Functionality figure). Or, in case you change your mind, click the Not Followed button. The menu re-appears where you can select Follow.
- Automatic insertion of *mentions*. An @ sign and mention are automatically inserted into replies. The @ sign is used to call out usernames in Tweets, like this: Hello @JoeBelow! When a user name is preceded by the @ sign, it becomes a link to a Twitter-user profile.
- Reply to all participants in the current Tweet thread. Click `Reply.` A drop-down menu is displayed. Select `Reply to All`.
- Send a direct message to an author of a Tweet message. When the Twitter message author is a follower,

you can send a direct message to the author as a form of reply.

- Retweet. Click `Reply`, select `Retweet` from the menu, and enter your Retweet. Right-click, select `Spell Checking` from the menu, correct any spelling errors, and then click Send.
- Retweet with comments. You can make a new Tweet, including the text of current message, and add additional comments. A Retweet indicator (RT) is automatically inserted at the start of the message text. Click `Reply`, select `Retweet with Comments`, enter the comment text (you can copy and paste selected text), and click `Send Retweet with Comments`.
- Open a clickable shortened URL. Twitter messages are limited to 280 characters. All URLs, including short forms like `goo.gl` will be counted as a 23-character string. Workspace supports shortened URLs.
- Open a Twitter user profile page by using clickable mentions. The @ sign is used to call out user names in Tweets, like this: Hello @JoeBelow! Click a user name preceded by the @ sign to link to a Twitter user profile.
- Perform a search in Twitter by using a clickable *#hashtag*. Twitter uses the # symbol, called a hashtag, to mark keywords or topics in a Tweet. Hashtags help you to find Tweets of interest. You can use the hashtag symbol before relevant keywords in Tweets to categorize those Tweets to display more prominently in a Twitter Search. Clicking on a hashtagged word in any message shows you all other Tweets in that category. Hashtags can occur anywhere in the Tweet.
- Display In-Reply to Tweet. If the delivered Tweet interaction is a reply to another Tweet, Workspace enables you to view the original Tweet by clicking on the user name located after "In Reply to". A new browser window opens to display the parent Tweet in Twitter.
- Delete an outbound Tweet from your history by clicking **Delete.**

Notes

- Currently, Promoted Tweets for Twitter platform are not supported as they are not directly referenced to any @mention or mapped to any tracked keyword.

Workspace Functionality

While you are interacting with your Twitter contact, you can use the general Workspace functionality in the Twitter Interaction window.

> **Important**
> Some of the procedures and tasks below are media-specific, but you can apply the information when working with Twitter interactions.

- Use the Note to attach a note to the interaction history. See Managing Contact History.
- View Case Information for the current interaction.
- View and manage contact history. See Managing Contact History
- View and manage contact information. See Lesson: Finding and viewing an interaction in the contact database.

- 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.
- You can move an outbound interaction that you are working on into a workbin.
- Use the Standard Response Library for pre-written text for replies and comments. Click the vertical `Responses` button in the Using The Standard Response Library lesson.
- Cross over into another media channel. If, as an agent, you learn other contact information (not Twitter-specific), such as a contact's phone number or email address, you can manually enter this information on the `Information` tab. The corresponding choice for other media channels is then displayed when you click the `Party Action` menu that is next to the name of the contact. You can then reply by using a voice call, an email, an SMS message, or any other supported media channel for a Twitter contact. Workspace displays a drop-down list of available channels to access a contact.
- If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:
    - Instant-transfer the interaction to another internal target. See Lesson: Starting an instant SMS transfer, which is similar to the Twitter procedure.
    - Start a consultation with another party:
    - Start an Instant Messaging consultation. See Lesson: Initiating an Instant Messaging session.
    - Start a Voice consultation. See Starting a Voice Consultation.
- When you are finished interacting with your contact, click `Done` to stop the current interaction.
- The information is saved in the contact history and the Twitter Interaction window is closed.
- Set a disposition code. See Assigning Disposition Codes.

Related Information

- Twitter Interaction

Handle An RSS Interaction

In this lesson, you will learn how to handle inbound RSS interactions fed from the web, how to view the web feed source, headline, and content; how to display channel and item category information; and how to display/update Actionability and Sentiment. This lesson contains the following sections:

- Receiving and Handling an Inbound RSS Interaction
- RSS-Specific Functionality
- Workspace Functionality

About RSS

RSS is a family of web feed formats used to publish frequently updated works—such as news headlines, content, and blog entries—in a standardized format. An RSS source or document, (which is called a "feed" or "channel") includes full or summarized text, plus metadata such as publishing dates and authorship.

Genesys software allows business users to avoid manually inspecting all of the web feeds they are interested in, and instead subscribe to websites such that all new content is sent to Workspace when it becomes available.

A plug-in for Workspace enables it to handle RSS social media interactions. This lesson contains information about how to RSS interactions.

Receiving and Handling an Inbound RSS Interaction

If you are the selected internal target of an inbound RSS interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it, the RSS Interaction window is displayed. The RSS Interaction window contains information about the interaction and the controls that you need to complete the interaction.

Lesson: Handling an inbound RSS interaction

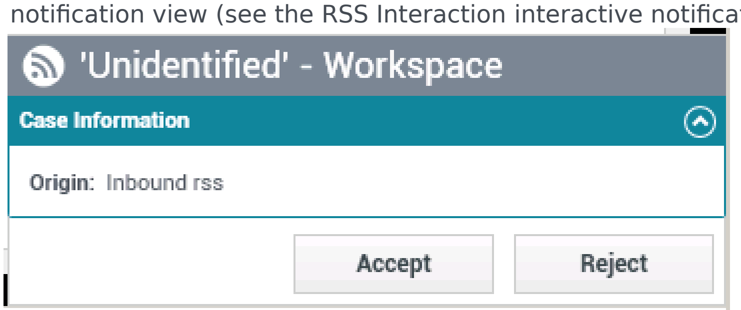
Purpose: To handle an inbound RSS interaction properly.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- Your status is Ready for the RSS-media channel (see Lesson: Going Ready in the Workspace Main window).
- You are the internal target of the inbound interaction.

Start

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the RSS Interaction interactive notification figure).

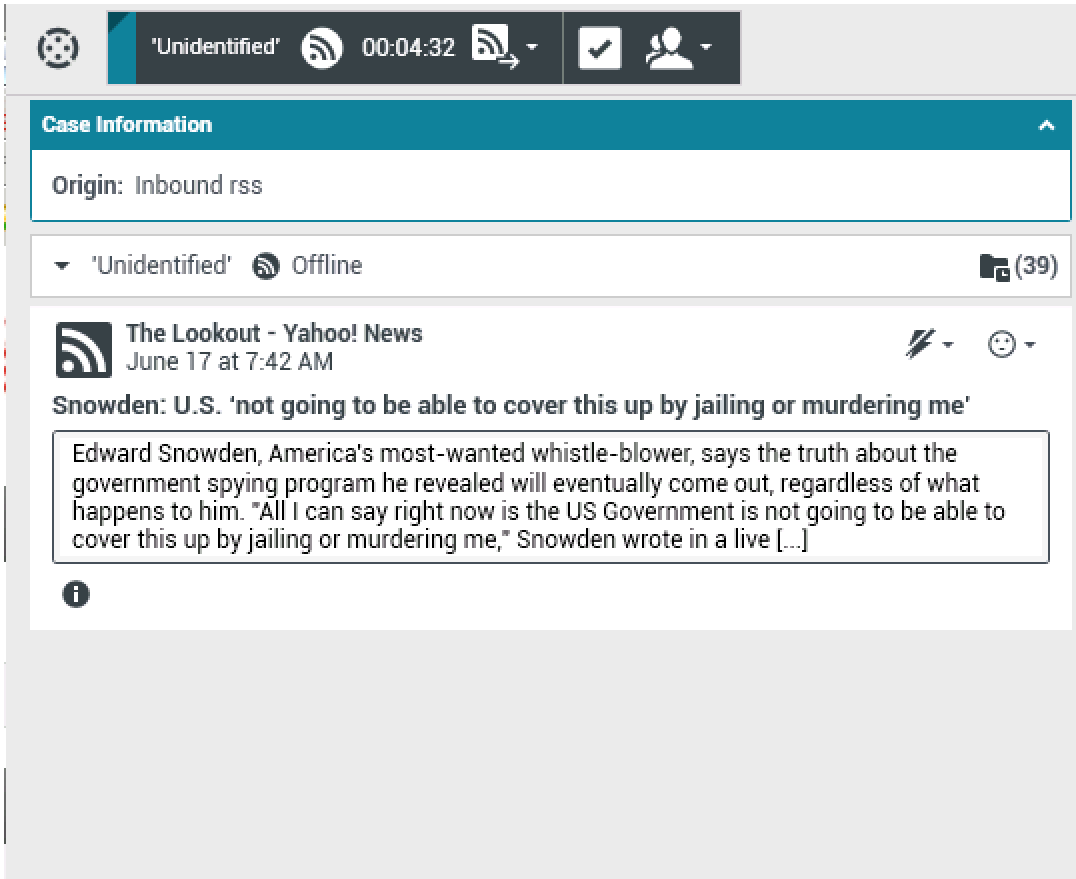


RSS Interaction interactive notification

The Interaction Preview contains a summary of information that pertains to the interaction, including contact information and type of interaction. The Interaction Preview might also contain Case Information, which is part of the case data about the interaction.

> **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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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)

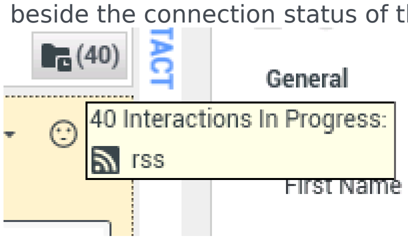
2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to display the interaction.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will time out and be redirected.
3. If you accept the interaction, the inbound RSS Interaction window is displayed. The RSS Interaction window figure shows an example interaction.



RSS Interaction window

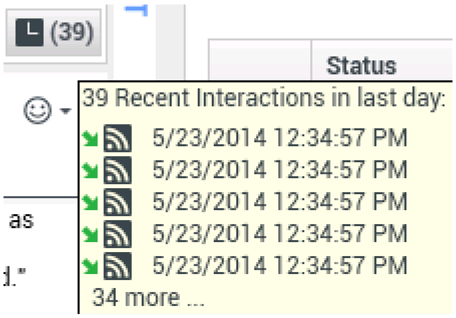
The original-routed RSS interaction appears in the left pane under the RSS interaction toolbar (see the RSS Interaction window figure).

4. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see the figure - Dynamic Contact History Matrix).



Dynamic Contact History Matrix

Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact. You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the figure - Recent Interactions Matrix). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



Recent Interactions Matrix

5. You can then view the source of the RSS interaction, the headline, and content (see the RSS Interaction window figure).

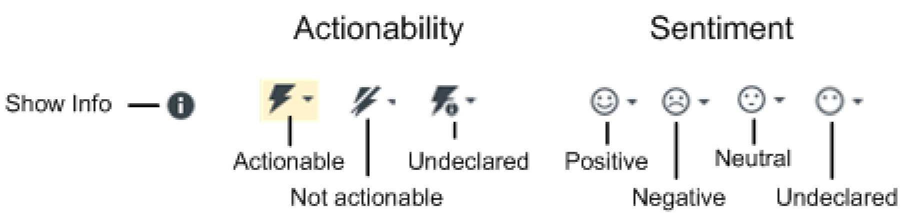
End

Next Steps

- You may wish to use some of the RSS-Specific Functionality described below. You may also wish to use some of the features in described in Workspace Functionality. When you are finished, click `Done` to stop the current interaction.The information is saved in the contact history and the RSS Interaction window is closed.

RSS-Specific Functionality

The RSS Interaction window provides some RSS-specific functionality. The following figure shows the relevant buttons and icons.



Buttons and Icons for RSS-Specific Functionality

You can:

1. View RSS Web Feed Source, Headline, and Content. The RSS interaction window lets you view the source of the web feed, the headline, and content. Click the headline to go directly to the associated page on the website.
2. View Channel and Item Category information. Click the `Show Info` button (see the Buttons and Icons for RSS-Specific Functionality figure) to view the channel copyright, language, published date, and item category.
3. View the Actionability and Sentiment of the RSS interaction. When an RSS interaction arrives, you can view Actionability and Sentiment icons (see the Buttons and Icons for RSS-Specific Functionality figure), which could have one of the following values or be undeclared:
   - Actionability--Can be actionable, not actionable, or undeclared

- Sentiment--Can be Positive, Negative, Neutral, or undeclared

  Actionable RSS interactions are colored yellow and non-actionable RSS interactions are colored in gray. Actionability and Sentiment are based on the classification and screening results that are described in the *eServices 8.1 User's Guide*.

4. Update the Actionability and Sentiment of the RSS Interaction. While processing the interaction, you have the option to change the value of the corresponding Actionability and Sentiment key by clicking the related icon and then choosing the correct value.

Workspace Functionality

While you are interacting with your RSS interaction, you can use the general Workspace functionality in the RSS Interaction window.

> **Tip**
>
> Some of the procedures and tasks below are media-specific, but you can apply the information when working with RSS interactions.

- Use the Note to attach a note to the interaction history. See Managing Contact History.
- View Case Information for the current interaction.
- View and manage contact history. See Managing Contact History
- View and manage contact (web feed source) information. See Lesson: Finding and viewing an interaction in the contact database.
- 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.
- If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:
  - Instant-transfer the interaction to another internal target. See Lesson: Starting an instant SMS transfer, which is similar to the RSS procedure.
  - Start a consultation with another party:
  - Start an Instant Messaging consultation. See Lesson: Initiating an Instant Messaging session.
  - Start a Voice consultation. See Starting a Voice Consultation.
- When you are finished interacting with the item, click Done to stop the current interaction.
- The information is saved in the contact history and the RSS Interaction window is closed.
- Set a disposition code. See Assigning Disposition Codes.

Related Information

- RSS Interactions

Handle A Workitem Interaction

In this lesson, you will learn how to handle inbound workitem interactions. Workitems are documents that might be directed to you for handling. They include numerous non-interactive media types, such as faxes, that you might have to view while you are handling interactions of another type, such as email. This lesson contains the following sections:

- Receiving and Handling an Inbound Workitem Interaction
- Transferring a Workitem Interaction

Receiving and Handling an Inbound Workitem Interaction

If you are the selected internal target for an inbound workitem interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it, the Workitem Interaction window is displayed. The Workitem Interaction window contains information about the interaction and the controls that you need to complete the interaction. This section contains the following procedure:

- Lesson: Handling an inbound workitem interaction

Lesson: Handling an inbound workitem interaction

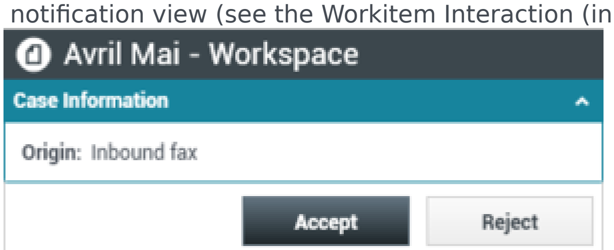
- To handle an inbound workitem interaction properly.

Prerequisites

- You are logged in to Workspace (see Getting Started).
- Your status is Ready for the workitem-media channel (see Lesson: Going Ready in the Workspace Main window).
- You are the internal target for the inbound interaction.

Start

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Workitem Interaction (in this case, a fax) interactive notification figure).



Workitem Interaction (in this case, a fax) interactive notification

The Interaction Notification contains a summary of information that pertains to the interaction, including contact information and type of interaction. The Interaction Notification might also contain Case Information, which is part of the case data about the interaction.

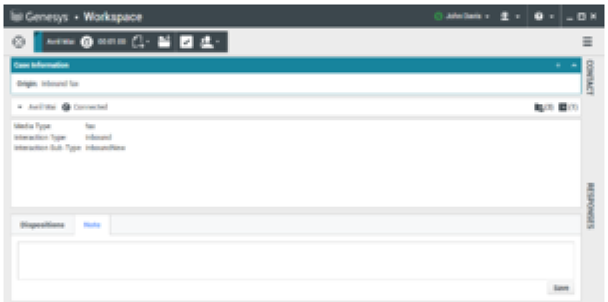
Tip

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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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)

If your account is configured for auto-answer, the Interaction Preview is not displayed and the workitem is opened automatically unless your account is configured to enable you to preview the case information before the interaction is auto-answered. In this case, when you receive an auto-answer interaction, the Interaction Preview is displayed on your desktop. A timer that counts down the number of seconds until you are connected to the contact is displayed in the **Accept** button (refer to the following figure). You can click **Accept** before the timer runs out or wait for the timer to run out. The **Reject** button might also be displayed if your administrator wants you to have the option of rejecting an interaction before it is auto-answered.[**Added:** 8.5.105.12]

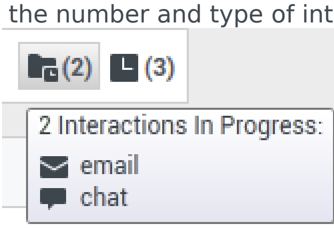
2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to display the interaction.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will time-out and be redirected.
3. If you accept the interaction, the inbound Workitem Interaction window is displayed (see the Inbound Workitem Interaction window figure). The Inbound Workitem Interaction window provides the following functionality:
   - Transfer (forward) the workitem to another internal target. See Transferring a Workitem Interaction.
   - Save the workitem in a workbin and close the Workitem Interaction window. See Using Workbins to Access Stored Interactions.
   - Select `Mark Done` for the current interaction to save the workitem in the contact history and close the Workitem Interaction window. See Managing Contact History.
   - Stat a voice or IM consultation with an internal target or with a contact. See Starting a Voice Conference or Lesson: Initiating an Instant Messaging session.
   - Set a disposition code. See Assigning Disposition Codes.
   - View and edit Case Information for the current interaction
   - Initiate a voice consultation. See Starting a Voice Conference.
   - Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.
   - Call (or email) the sender by clicking the `Action` menu that is displayed next to the contact name. See Making a Voice Call.
   - View and manage contact history. See Managing Contact History.

- View and manage contact information. See Lesson: Finding and viewing an interaction in the contact database.
- 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.
- View the Standard Response Library if you decide to call the sender. See Inserting a Standard Response into an Email Interaction.



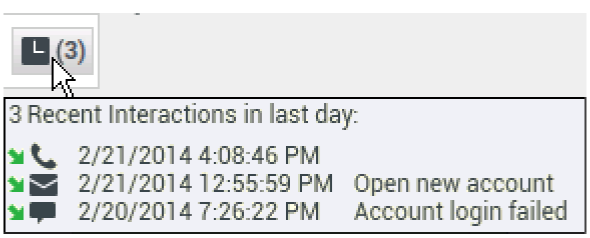
Inbound Workitem Interaction window

4. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see the Dynamic Contact History Matrix, displaying the number and type of interactions in progress figure). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.



Dynamic Contact History Matrix displaying the number and type of interactions in progress for the current contact

You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Recent interactions matrix displaying the list of interactions with the current contact within the last day figure). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



Recent interactions matrix displaying the list of interactions with the current contact within the last day

End

Transferring a Workitem Interaction

The Workspace Workitem Interaction window enables you to transfer your current workitem interaction to another party. In this section, you will learn how to use the Team Communicator feature to transfer a workitem interaction to an internal target or to a contact. The Team Communicator enables you to find an internal target or a contact, send an Instant Message (IM) to an internal target, call a contact or an internal target, initiate a conference, or transfer a call. This section contains the following procedure:

- Lesson: Initiating a workitem transfer

Lesson: Initiating a workitem transfer

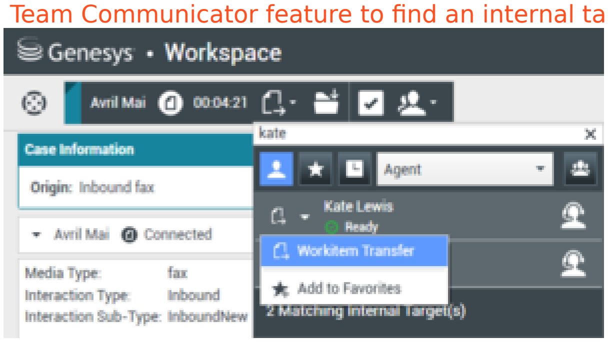
- To find an internal target (such as an agent, Routing Point, or queue), and then transfer the workitem to the internal target.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have an active interaction with a contact (see Receiving and Handling an Inbound Workitem Interaction).

Start

1. In the active Workitem Interaction window, click `Transfer` to open the Team Communicator (see the Finding an internal target for workitem transfer in the active Workitem 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 for workitem transfer in the active Workitem 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 select `Workitem Transfer`. An invitation is sent to the target to accept the workitem 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 Workitem 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

- Workitems

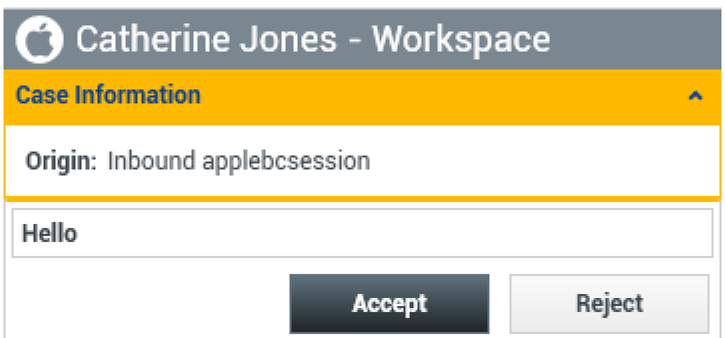
Handle an Apple Messages for Business Interaction

This section describes using Workspace Desktop Edition to receive and handle interactions coming from the Apple Messages for Business channel of Genesys Messaging Apps.

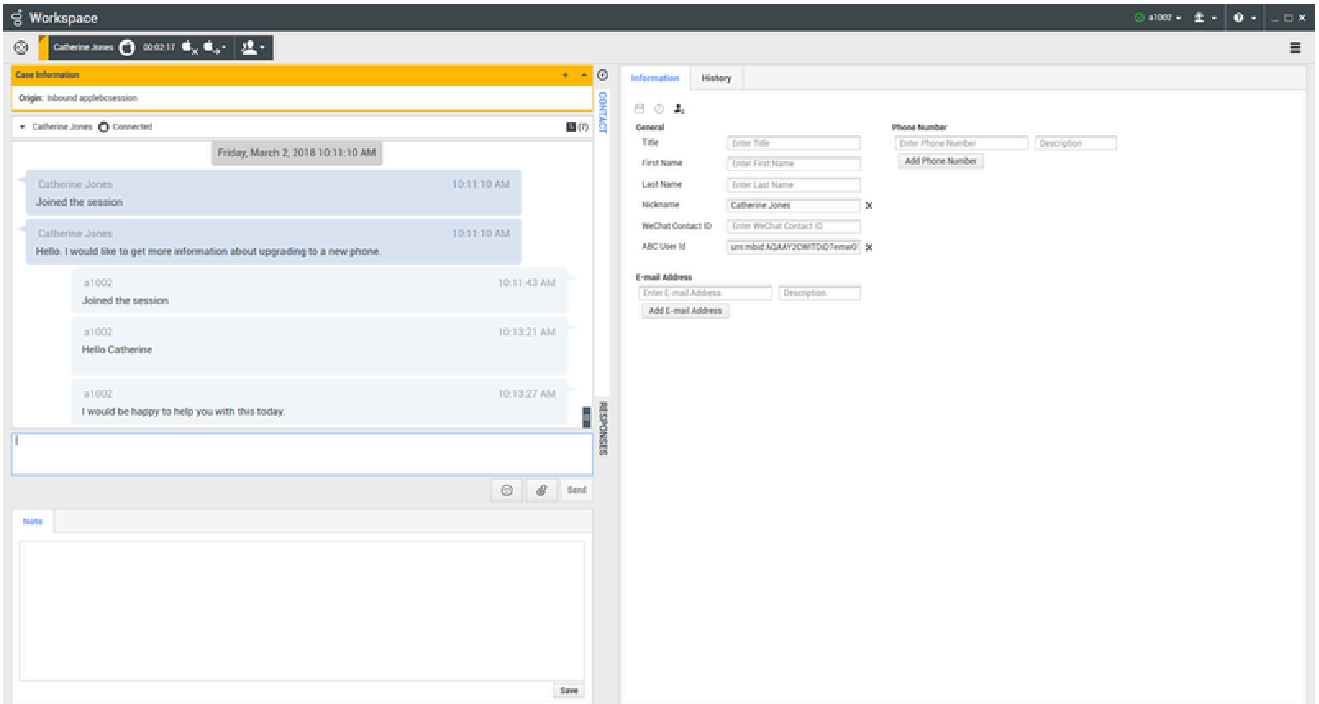
Link to video

Receiving and Handling an Inbound Apple Messages for Business Interaction

If you are the selected internal target of an inbound Apple Messages for Business interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction.

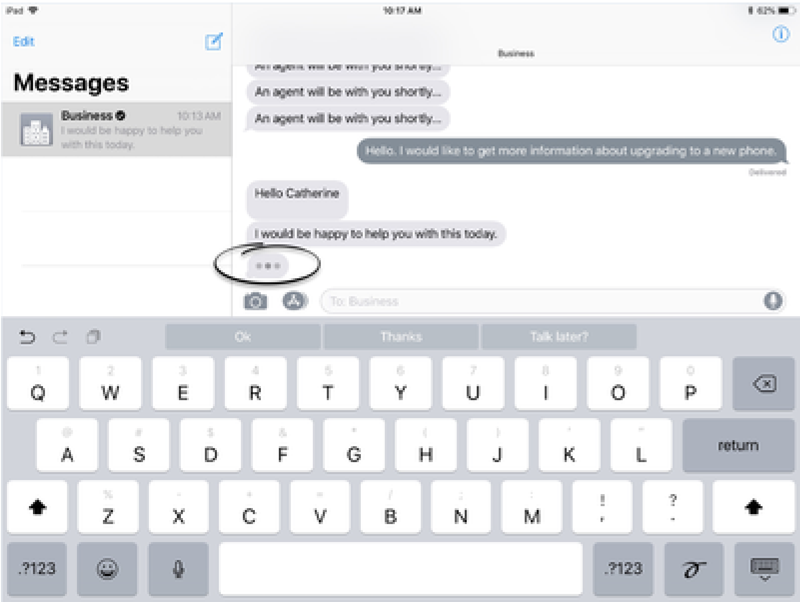


If you accept it, the Apple Messages for Business Interaction window is displayed. The Apple Messages for Business Interaction window contains information about the interaction and the controls that you need to complete the interaction.



The message area appears similar to a smartphone-based messaging app client:

- Client messages are left-aligned.
- Agent messages are right-aligned.
- Errors are centered.
- The date for when the session started is centered.
- The customer sees a typing notification when the agent is writing a message, as shown below.



If the customer's contact information matches an entry in your contact database, the customer's name appears in the message area. Otherwise, a default nickname appears.

Additionally, if the customer previously contacted your company using Apple Messages for Business, these previous interactions appear in the message area. Depending on your settings and the number of previous messages, you might need to click **see older messages...** to see previous Apple Messages for Business from the current contact. Records of previous Apple Messages for Business interactions, as well as records of other interaction types, also appear in the Contact History view in Workspace.

Important

- Administrators can configure colors and text size. See the configuration options page for more information.
- Administrators can configure the option applebcsession.transcript-interactions-count to specify how many messages from previous interactions appear in the chat message window.
- Administrators can configure the option applebcsession.max-text-message-size to set the maximum size of the outbound text message, specified in bytes by converting the message string to UTF-8 encoding. A notification appears below the message area if the maximum value is exceeded. Some symbols might require additional characters, such as emojis.

Lesson: Handling an inbound Apple Messages for Business interaction

Purpose: To handle an inbound Apple Messages for Business interaction properly.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- Your status is Ready for the Apple Messages for Business media channel (see Lesson: Going Ready in the Workspace Main window).
- You are the internal target of the inbound interaction.

Start

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view. The Interaction Preview contains a summary of information that pertains to the interaction, including contact information and type of interaction. The Interaction Preview might also contain Case Information, which is part of the case data about the interaction.
2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the following steps:
   - Click `Accept` to display the interaction.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will time out and be redirected.
3. To reply to the message, just enter text in the message area. You can copy and paste selected text.
4. (Optional) If necessary, you can transfer the conversation to another agent, or invite another agent to join a conference.
   1. Click  (transfer) or  (conference), and select the type of target.
   2. Click the magnifying glass to search by name or phone number.

Important

- Before agents can request a conference, an administrator must:
  - Set the option intercommunication.applebcsession.queue before agents can request a conference via the Skill or Group option.
  - Create a Business Attribute of type **Interaction Subtype** with the name **InternalConferenceInvite**.
- For more information on transfers, refer to the Workspace documentation topic Lesson: Starting an instant SMS transfer, which is similar to the Apple Messages for Business procedure.

End

Next Steps

- You may wish to use some of the the features in described in Apple Messages for Business Functionality and Workspace Functionality below. When you are finished, click `Done` to stop the current interaction.The information is saved in the contact history and the Apple Messages for Business Interaction window is closed. You can also set a disposition code.

Apple Messages for Business-Specific Functionality

While you are interacting with your Apple Messages for Business contact, you can use the general Workspace functionality in the Apple Messages for Business Interaction window.

> **Important**
> Some of the procedures and tasks below are media-specific, but you can apply the information when working with Apple Messages for Business interactions.

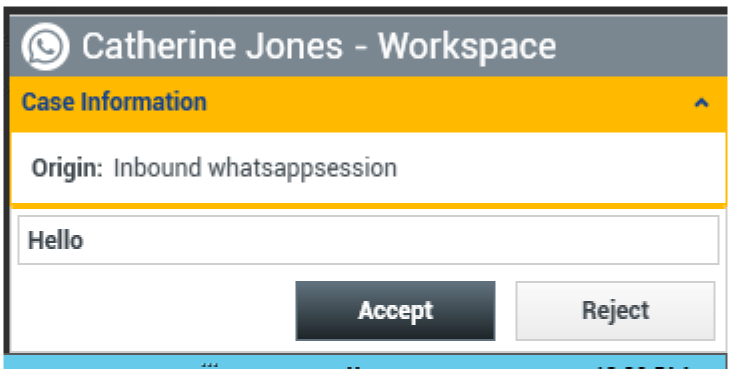
- Use the Note to attach a note to the interaction history. See Managing Contact History.
- View Case Information for the current interaction.
- View and manage contact history. See Managing Contact History
- View and manage contact information. See Lesson: Finding and viewing an interaction in the contact database.
- 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.
- Use the Standard Response Library for pre-written text for replies and comments. Click the vertical **Responses** button, as shown in the Using The Standard Response Library lesson.
- Cross over into another media channel. If, as an agent, you learn other contact information, such as a contact's phone number or email address, you can manually enter this information on the **Information** tab. The corresponding choice for other media channels is then displayed when you click the **Party Action** menu that is next to the name of the contact. You can then reply by using a voice call, an email, an SMS message, or any other supported media channel for a Apple Messages for Business contact. Workspace displays a drop-down list of available channels to access a contact.
- If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:
    - Instant-transfer the interaction to another internal target. See Lesson: Starting an instant SMS transfer, which is similar to the Apple Messages for Business procedure.
    - Start a consultation with another party:
    - Start an Instant Messaging consultation. See Lesson: Initiating an Instant Messaging session.
    - Start a Voice consultation. See Starting a Voice Consultation.

Handle a WhatsApp Interaction

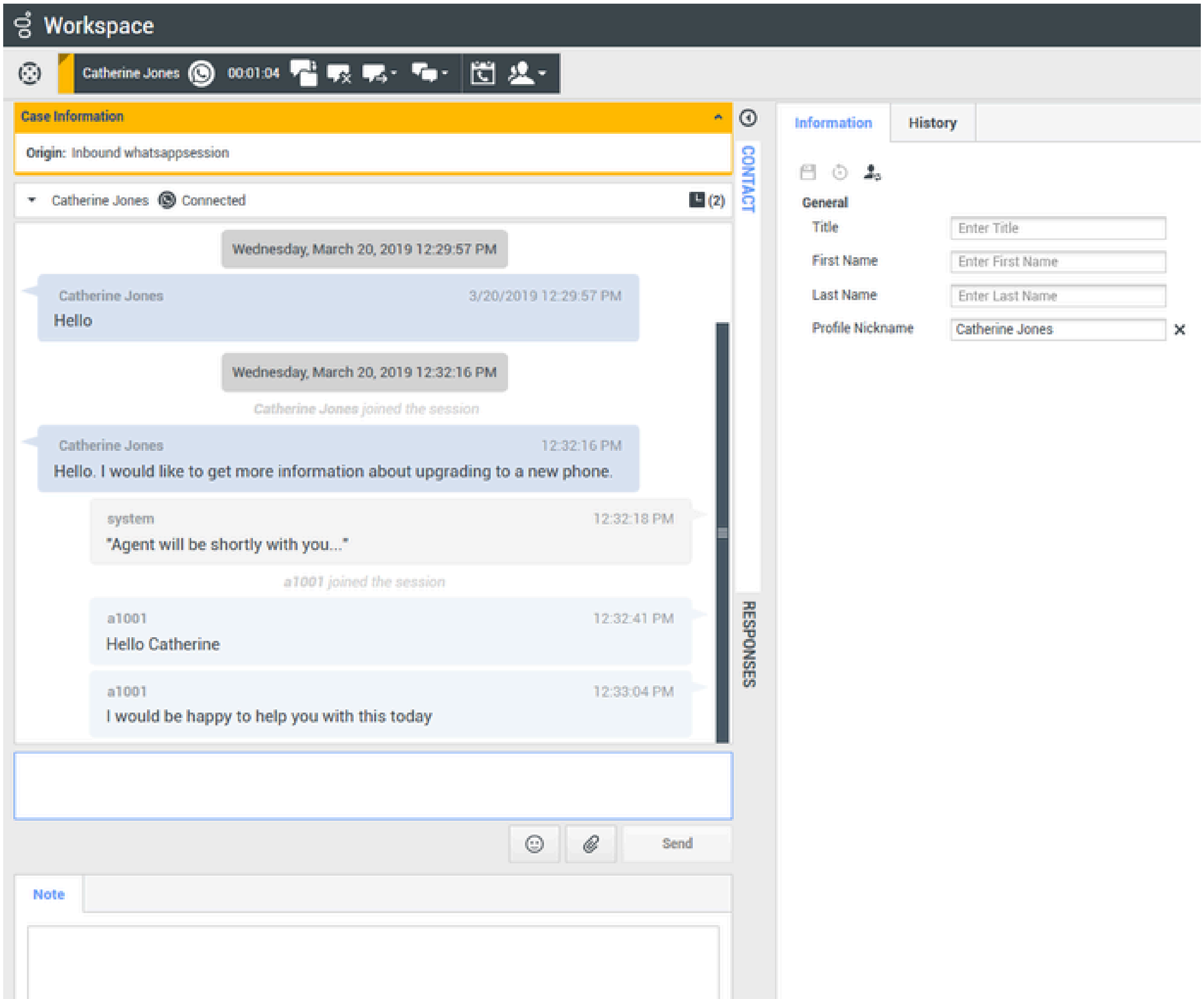
This section describes using Workspace Desktop Edition to receive and handle interactions coming from the WhatsApp channel of Genesys Messaging Apps.

Receiving and handling an inbound interaction

If you are the selected internal target of an inbound WhatsApp interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction.



If you accept it, the WhatsApp Interaction window is displayed. This window contains information about the interaction and the controls that you need to complete the interaction.



The message area appears similar to a smartphone-based messaging app client:

- Client messages are left-aligned.
- Agent messages are right-aligned.
- Errors are centered.
- The date for when the session started is centered.

If the customer's contact information matches an entry in your contact database, the customer's name appears in the message area. Otherwise, a default nickname appears.

Additionally, if the customer previously contacted your company using WhatsApp, these previous interactions appear in the message area. Depending on your settings and the number of previous messages, you might need to click **see older messages...** to see previous WhatsApp messages from the current contact. Records of previous WhatsApp interactions, as well as records of other interaction types, also appear in the Contact History view in Workspace.

> ## Important
>
> - Administrators can configure colors and text size. See the configuration options page for more information.
> - Administrators can configure the option whatsappsession.transcript-interactions-count to specify how many messages from previous interactions appear in the chat message window.
> - Administrators can configure the option whatsappsession.max-text-message-size to set the maximum size of the outbound text message, specified in bytes by converting the message string to UTF-8 encoding. A notification appears below the message area if the maximum value is exceeded. Some symbols might require additional characters, such as emojis.

Lesson: Handling an inbound WhatsApp interaction

Purpose: To handle an inbound WhatsApp interaction properly.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- Your status is Ready for the WhatsApp media channel (see Lesson: Going Ready in the Workspace Main window).
- You are the internal target of the inbound interaction.

Start

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view. The Interaction Preview contains a summary of information that pertains to the interaction, including contact information and type of interaction. The Interaction Preview might also contain Case Information, which is part of the case data about the interaction.
2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the following steps:
   - Click `Accept` to display the interaction.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will time out and be redirected.
3. To reply to the message, just enter text in the message area. You can copy and paste selected text.
4. (Optional) If necessary, you can transfer the conversation to another agent, or invite another agent to join a conference.
   1. Click  (transfer) or  (conference), and select the type of target.
   2. Click the magnifying glass to search by name or phone number.

Important

- Before agents can request a conference, an administrator must:
  - Set the option intercommunication.whatsappsession.queue before agents can request a conference via the Skill or Group option.
  - Create a Business Attribute of type **Interaction Subtype** with the name **InternalConferenceInvite**.
- For more information on transfers, refer to the Workspace documentation topic Lesson: Starting an instant SMS transfer, which is similar to the WhatsApp procedure.

End

Next Steps

- You may wish to use some of the the features in described below. When you are finished, click Done to stop the current interaction.The information is saved in the contact history and the WhatsApp Interaction window is closed. You can also set a disposition code.

WhatsApp-Specific Functionality

While you are interacting with your WhatsApp contact, you can use the general Workspace functionality in the WhatsApp Interaction window.

Important

Some of the procedures and tasks below are media-specific, but you can apply the information when working with WhatsApp interactions.

- Use the Note to attach a note to the interaction history. See Managing Contact History.
- View Case Information for the current interaction.
- View and manage contact history. See Managing Contact History
- View and manage contact information. See Lesson: Finding and viewing an interaction in the contact database.
- 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.
- Use the Standard Response Library for pre-written text for replies and comments. Click the vertical **Responses** button, as shown in the Using The Standard Response Library lesson.
- Cross over into another media channel. If, as an agent, you learn other contact information, such as a contact's phone number or email address, you can manually enter this information on the **Information** tab. The corresponding choice for other media channels is then displayed when you click the **Party**

Action menu that is next to the name of the contact. You can then reply by using a voice call, an email, an SMS message, or any other supported media channel for a WhatsApp contact. Workspace displays a drop-down list of available channels to access a contact.

- If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:
  - Instant-transfer the interaction to another internal target. See Lesson: Starting an instant SMS transfer, which is similar to the WhatsApp procedure.
  - Start a consultation with another party:
  - Start an Instant Messaging consultation. See Lesson: Initiating an Instant Messaging session.
  - Start a Voice consultation. See Starting a Voice Consultation.

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

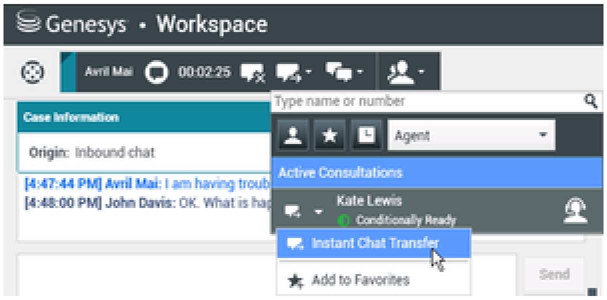
> **Tip**
>
> The procedures in this lesson demonstrate the principles of media blending; they do not show all the possible media-blending combinations.

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

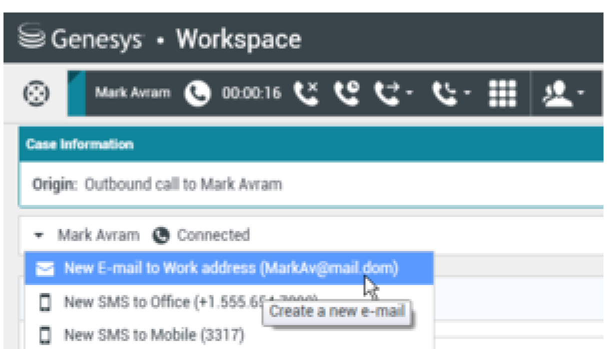
Interaction	Media blending and consultation
	IM consultation
	Chat consultation
SMS	Voice
	E-mail
Social Media	Voice
	E-mail
Workitem	SMS

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

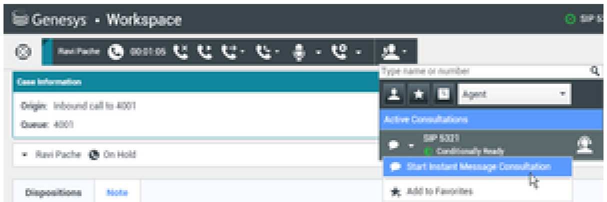
From an active interaction, to add a new media-type to a conversation, click the `Action` menu that is next to the name of the party (see the Active party Action menu displaying available media figure).



Active party Action menu displaying available media

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

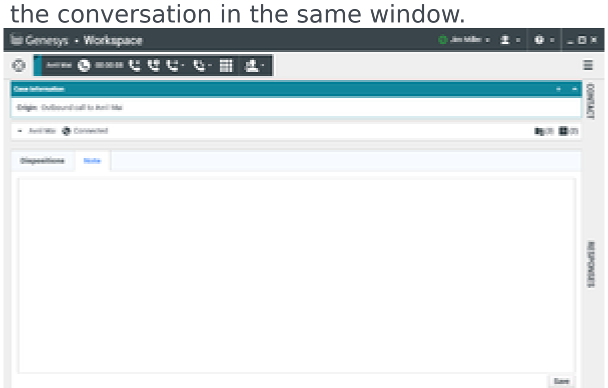
Purpose: To add a different type of media to an existing interaction.

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).

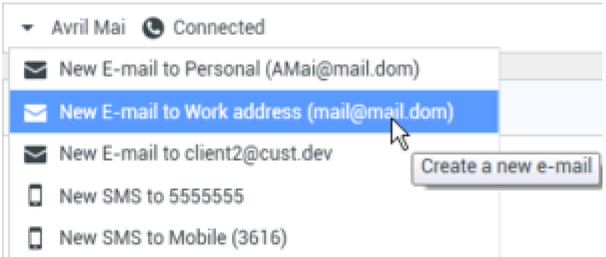
Start

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.



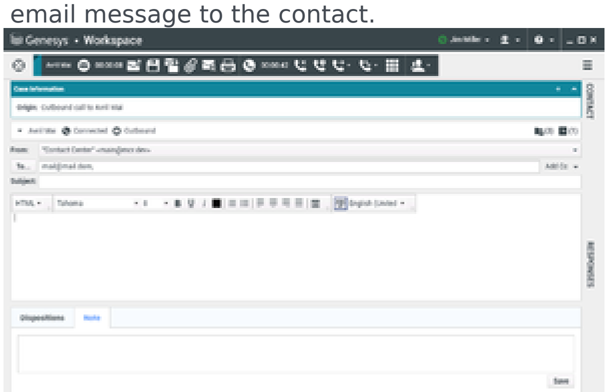
Voice Interaction Window

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.

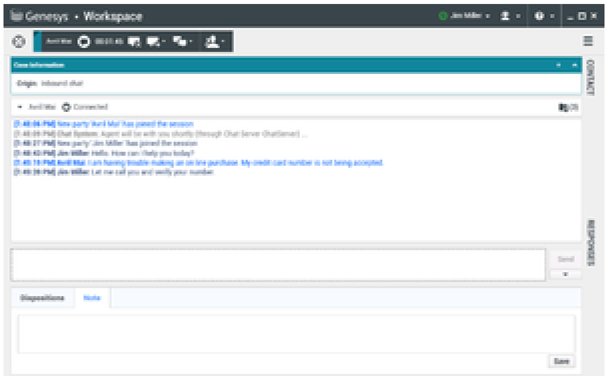
Prerequisites

- 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

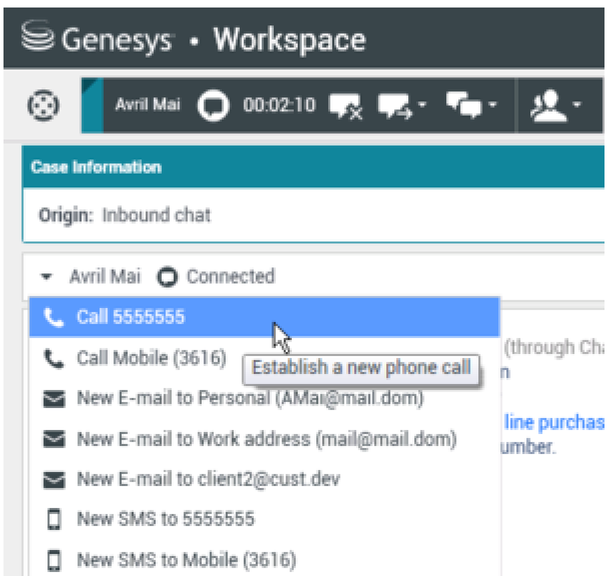
1. During a chat with a contact you might want to call the contact. The Chat Interaction window (see the

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



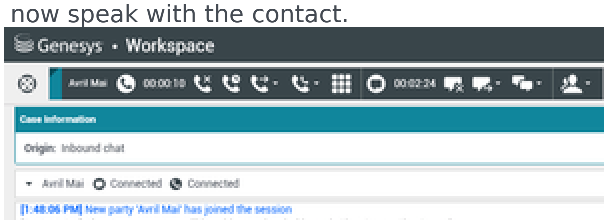
Chat Interaction Window

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

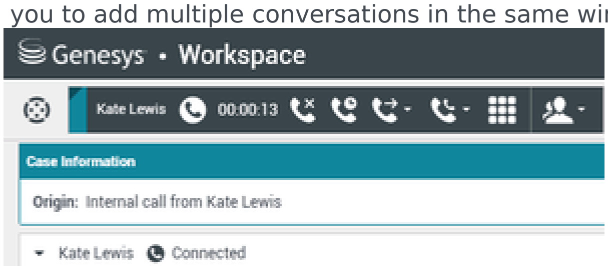
Purpose: To add an internal IM interaction to an active internal voice interaction and handle both in the same window.

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).

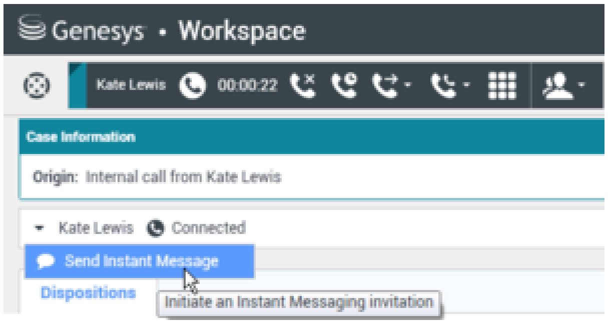
Start

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

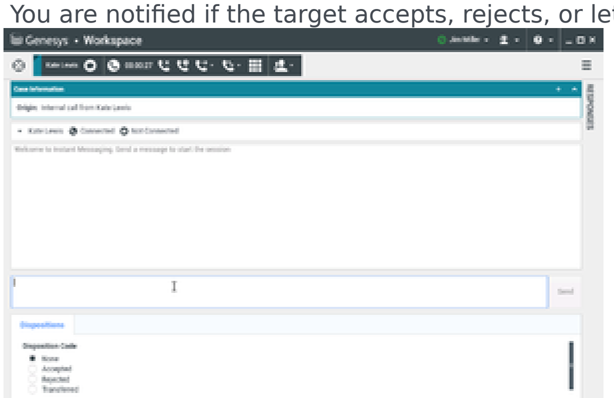
To add an IM interaction to your conversation, click the `Party Action` menu next to the name of your internal target and select `Send Instant Message` (see the Party menu in the active Voice Interaction window figure).



Party menu in the active Voice Interaction window

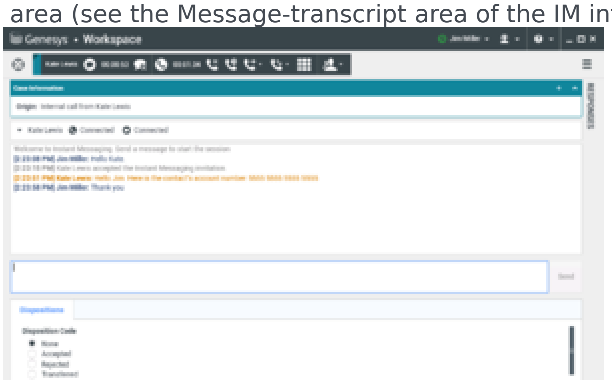
The IM interaction view is displayed in the active Voice Interaction window (see the Starting an IM interaction in the active interaction window figure).

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

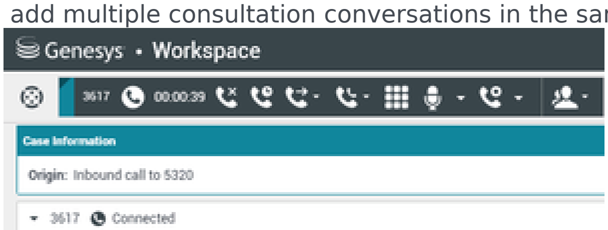
Purpose: To add an internal IM consultation to an active internal voice consultation and handle both in the same window.

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).

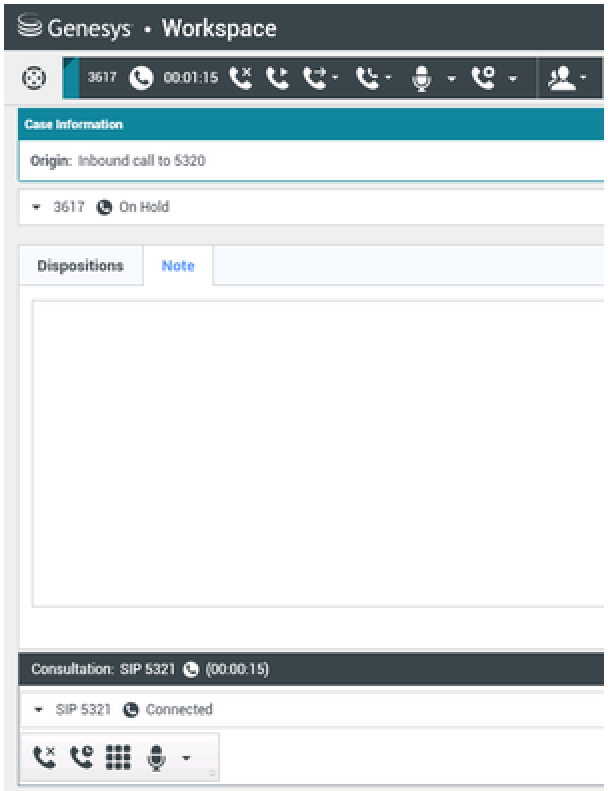
Start

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.



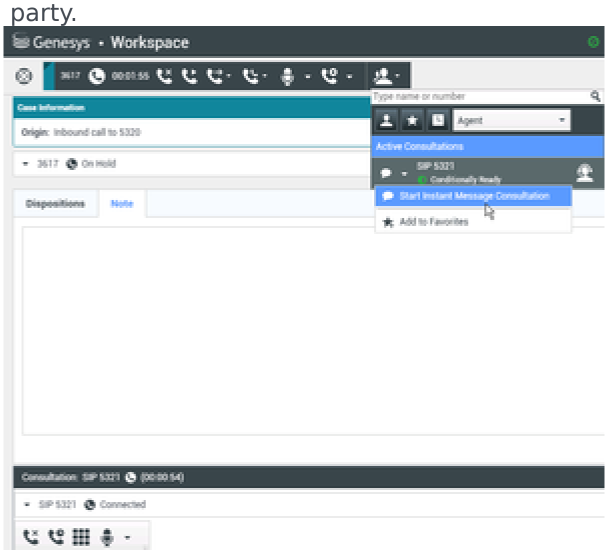
Voice Interaction Window

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).



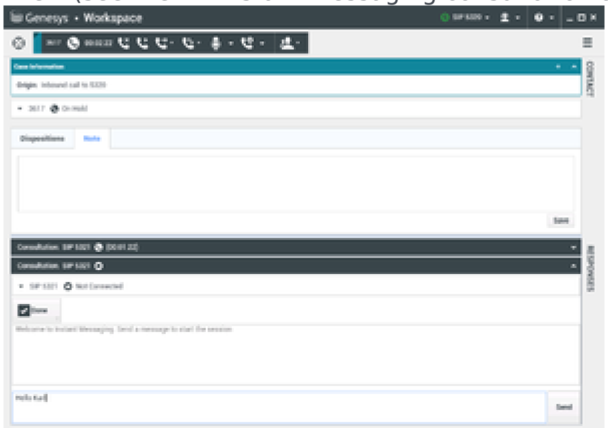
Lesson: Starting a voice consultation

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.



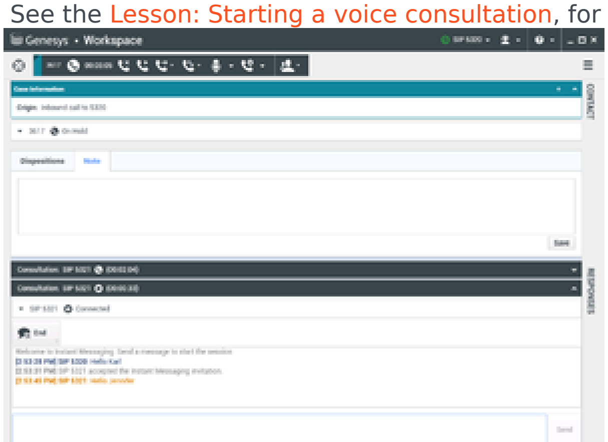
Active Consultation Action menu

4. 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

5. 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.
6. 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

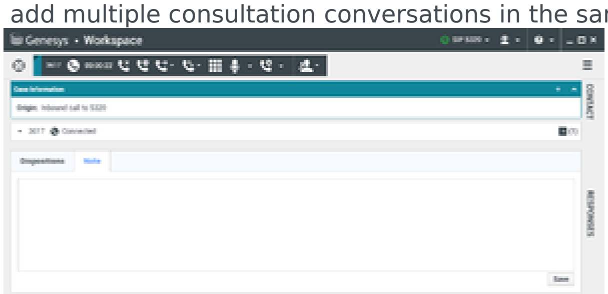
Purpose: To add an internal voice interaction to an active internal IM interaction and handle both in the same window.

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).

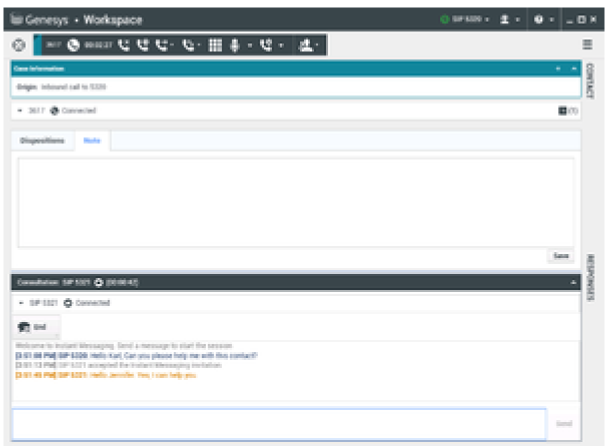
Start

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.



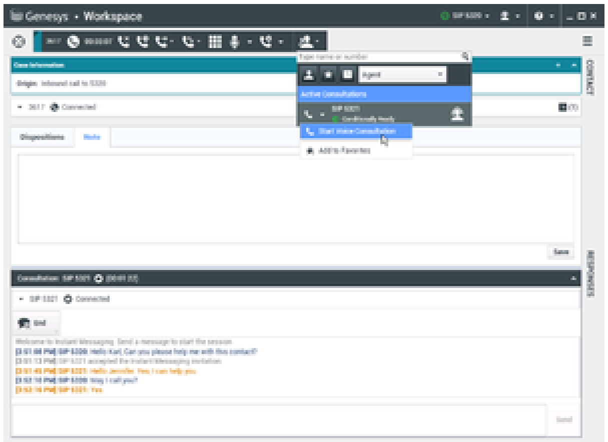
Voice Interaction Window

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).



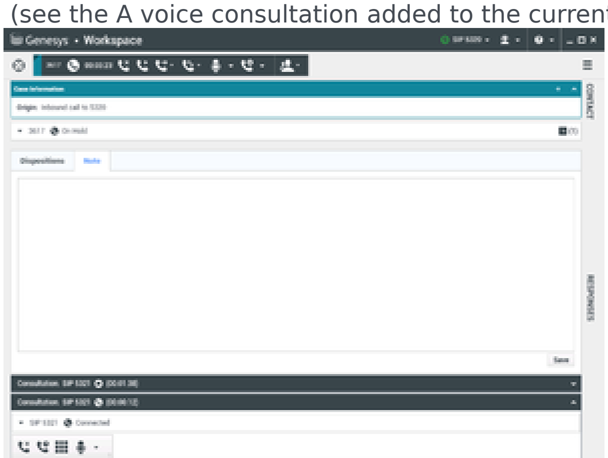
Lesson: Starting a Consultation IM session from an active interaction

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

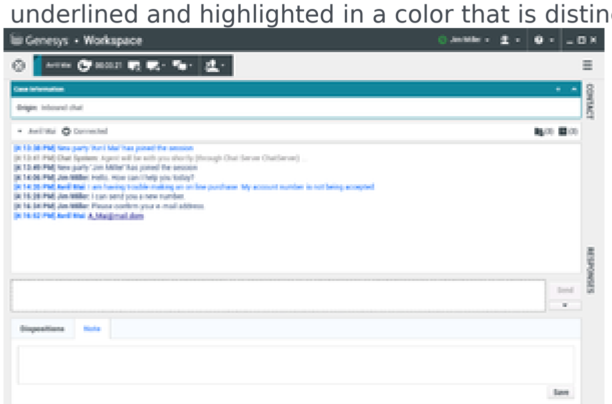
Purpose: To create a new email interaction by clicking an email address link in another interaction. The principles of this procedure are applicable to email links in chat, email, and SMS interactions.

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.

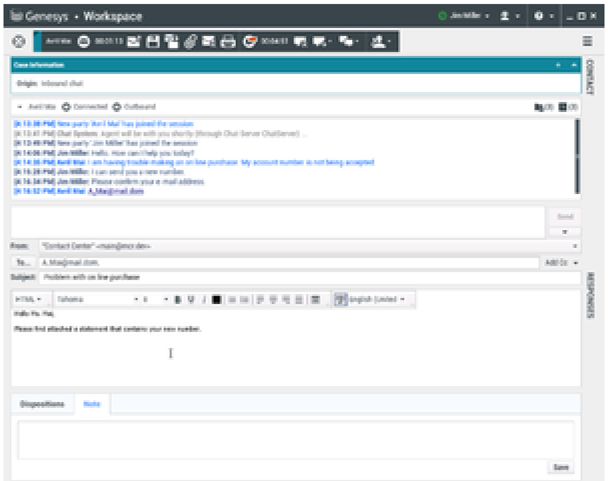


Chat interaction with a clickable email link from the contact

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.

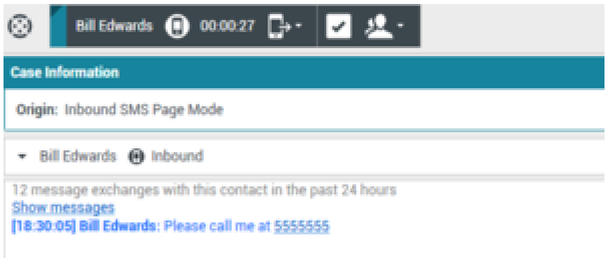
The principles of this procedure are applicable to phone number links in chat and SMS interactions.

Prerequisites

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

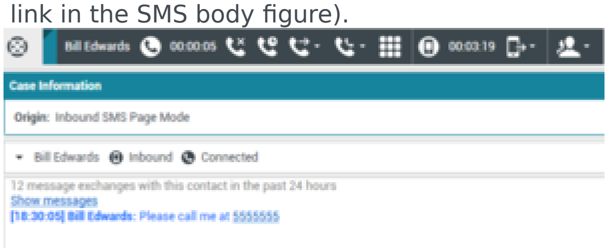
Start

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

Edit Case Information And Record Information

[**Modified:** 8.5.117.18, 8.5.118.10,8.5.121.03]

In this lesson, you will learn how to edit the Case Information of your interactions and the Record Information of your outbound campaign voice interactions.

Sometimes when you receive an interaction, there might be errors in the Case Information. For example, a contact might have given erroneous or incomplete information to the IVR, or selected the wrong language preference. Workspace enables agents who are configured to edit Case Information to make changes to specified fields in the Case Information and Record Information views (refer to the *Workspace Help* for more information on these views).

You can correct fields while you manage the interaction, or you can update fields to reroute the interaction to a different agent or queue.

> **Tip**
> Sometimes URLs (links to websites) are included in Case Data. URLs in the Case Data might be plain text or they might be hyperlinked text. For hyperlink text, you will be able to read the URL before clicking it by hovering your mouse pointer over the URL to display a tooltip that lets you see the address.

This lesson contains the following section:

- Editing Case Information

Editing Case Information

You can edit the case information of active interactions if you are configured with this privilege. There are four types of Case Data that you can update:

- Text (word or string of words)
- Check boxes (Boolean: yes/no)
- Dates (date and time)
- Numbers (integer and decimal)
- Specific text or numbers selected from a drop-down list or folder tree

Lesson: Modifying case information

Purpose: To specify a different value for a Case-Information field that is configured to be editable.

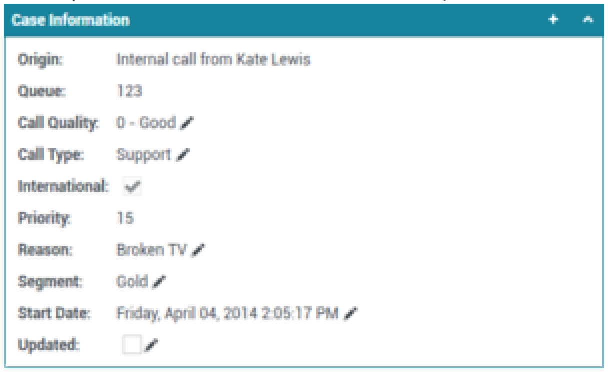
> **Tip**
> You can also use this procedure to edit the Record Information of your outbound campaign voice interactions.

Prerequisites

- You are configured to edit case information.
- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have accepted an interaction that contains case data.

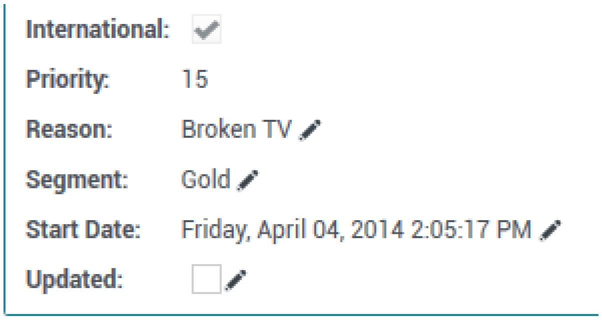
Start

1. When the interaction is displayed on your desktop, view the Case Information view. Move your mouse pointer over the view to see which fields are editable. Editable fields are indicated by a small pencil icon (see the Case Information view, with both editable and non-editable fields figure).



Case Information view, with both editable and non-editable fields

Editable check boxes appear as active, while non-editable check boxes appear as inactive (that is, dimmed—see the Case Information, with both editable and non-editable check boxes figure).



Case Information, with both editable and non-editable check boxes

Important

Mandatory fields: Your administrator might have made some editable fields mandatory to be edited before you can mark done, send, or close an interaction. Mandatory fields are indicated by a red asterisk. If you attempt to mark done, send, or close an interaction without editing a mandatory field an error message is displayed, and you are prevented from marking done, sending, or closing the interaction [**Added:** 8.5.117.18]

Sometimes, not all of the case data is available. There might be fields missing. If you are configured to add missing fields, the `Add Field` button ( ) is displayed in the Case Information toolbar.

a. Click `Add Field` to display a drop-down list of fields.

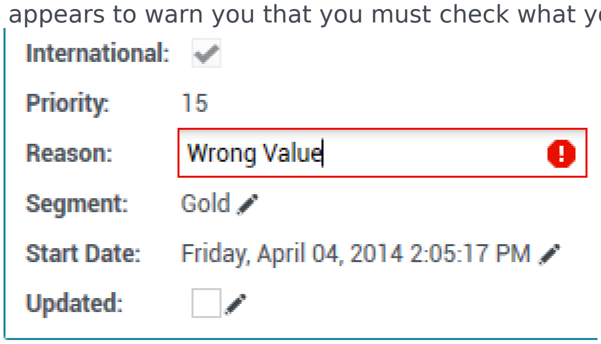
b. Select a missing field to display the field in the Case Information view.

c. Click X to remove the field.

d. Enter the missing Case Data. For certain types of data, what you enter might be restricted to a certain number of characters or certain types and combinations of characters. For example, if you have to enter a credit card number, then the field might only allow certain numbers for a particular type of credit card.

   If one of the characters that you type is invalid or the maximum number of characters that is allowed is reached, then nothing will be entered in the text field.

   If what you have typed does not match what Workspace is expecting you to enter, an error icon appears to warn you that you must check what you have entered and correct it.



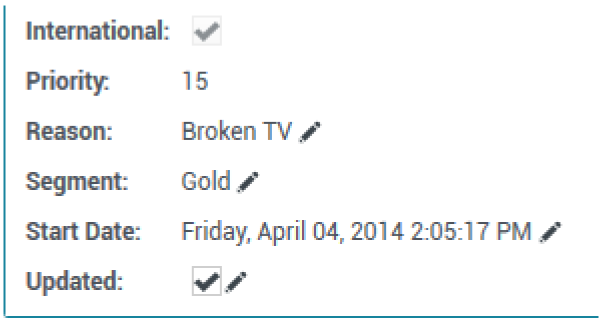
Case data field turns red if invalid characters are entered.

Important

Incorrect format: If you do not correct incorrectly formatted entries before you attempt to mark done, transfer, move the interaction to a workbin, or any other action that transfers ownership of the interaction, a warning message is displayed asking you to either discard your changes or proceed with the action. If you cancel your action, you can correct the entry. If the entry is mandatory, you must set the correct value before you can close the interaction.

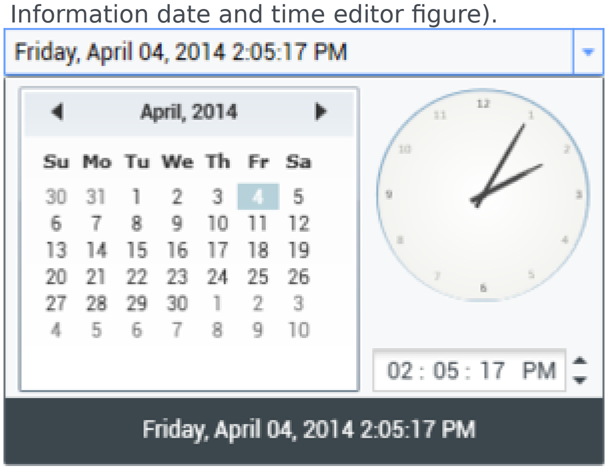
e. If what you have entered is correct, press `Enter` to add the Case Data to the case information for the interaction.

2. Click an editable check box to select it (see the Case Information with an editable check box selected figure); click it again to de-select it (see the Case Information, with both editable and non-editable check boxes figure).



Case Information with an editable check box selected

3. Click an editable data-time field to edit it. A calendar and time-picker view is displayed (see the Case Information date and time editor figure).

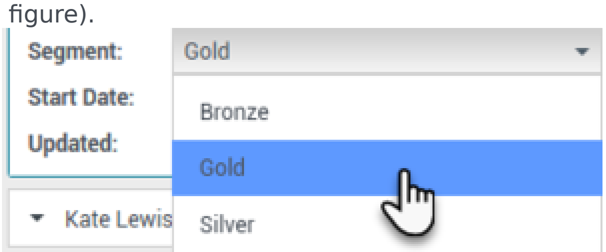


Case Information date and time editor

To set a new date, use the arrows to move the month and year forward and backward, respectively. Click a day to select it.

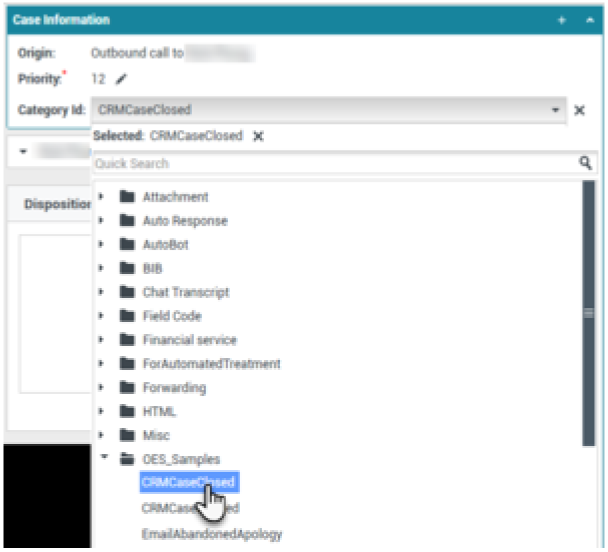
To set a new time, click an hour, minute, or second, and then use the up and down arrows to increase or decrease the value respectively, or use your keyboard to enter a new value.

4. Click an editable drop-down list to change its value (see the Case Information drop-down list editor figure).



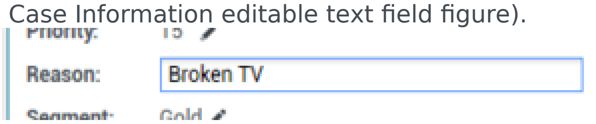
Case Information drop-down list editor

Some drop-down lists might contain a tree structure of folders. The tree structure allows your adminstrator to group different related selections in folders to make it easier for you to find the correct choice. You can either click through the folder structure to find the selection or, if you know the name of the selection you want, just type it in the Quick Search box. To open or close a folder, click it. To select an entry, click it. [**Added:** 8.5.118.10]



Case Information drop-down list editor showing a tree structure

5. To edit a text value, click the value to open the text-edit field. Modify the value and press `Enter` (see the Case Information editable text field figure).



Case Information editable text field

End

Related Information

- Case Data

Using The Standard Response Library

[**Modified:** 8.5.118.10]

In this lesson, you will learn how to access a database of prewritten standard responses for your interactions.

> **Tip**
> You can insert responses as replies into any email message, chat message, or SMS message, or you can read them to the contact during a voice interaction or Outbound Campaign call.

This lesson contains the following section:

- Inserting a Standard Response into an Email Interaction

Inserting a Standard Response into an Email Interaction

Your contact center might have a database of standard responses that you can access to compose prewritten replies to the email, chat, and SMS interactions of a contact. You can find and insert standard responses manually, or use suggested responses that are based on how relevant they are to the incoming message from the contact. Your administrator defines the standard responses to which you have access. The responses to which you have access might be restricted by business area, language, or other criteria that are specific to your business or role.

This section contains the following procedures:

- Finding and inserting a standard response into an email interaction
- Using a shortcut to insert a standard response into an email interaction
- Searching the Standard Response Library for a standard response
- Searching the Standard Response Library for a suggested response

Lesson: Finding and inserting a standard response into an email interaction

Purpose: To send a pre-written response to a customer interaction (email, chat, or SMS).

Prerequisites

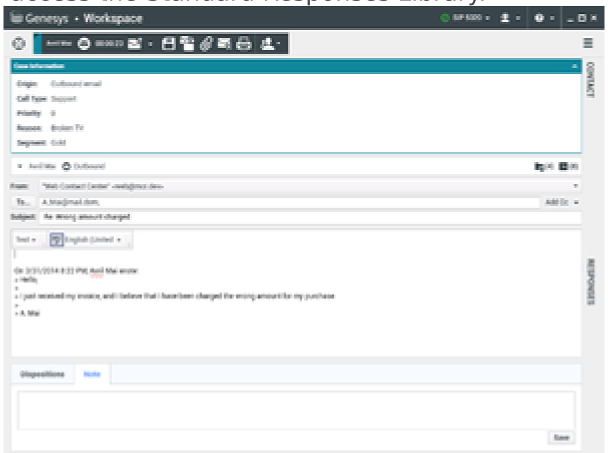
- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have accepted the inbound or transferred email interaction or created a new interaction (see

Lesson: Handling an inbound email interaction or Lesson: Creating and sending a new email interaction to a contact).

- If you are handling an inbound email interaction, you have clicked Reply or Reply All in the inbound Email Interaction window (see Lesson: Replying to a inbound email interaction).

Start

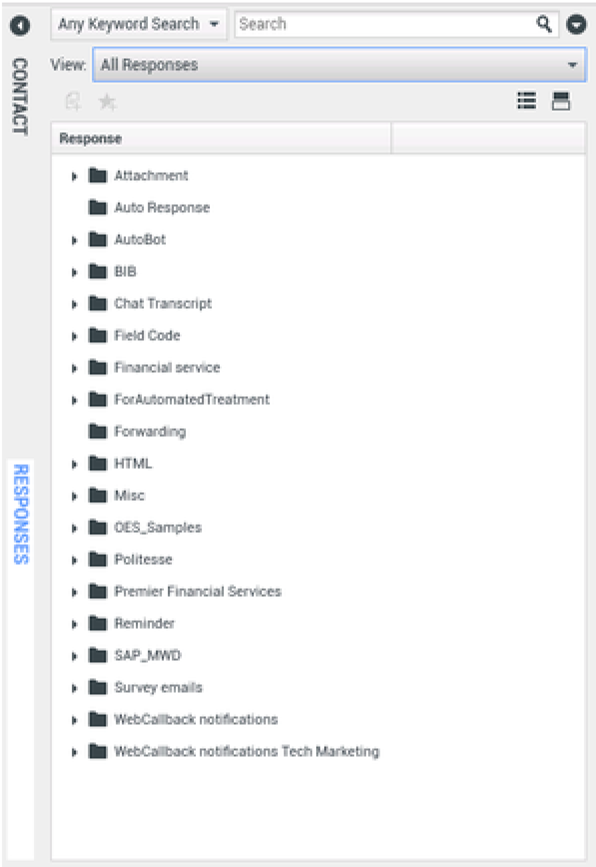
1. If your account is configured to use standard responses, all Workspace interaction windows, such as the Email Interaction window (see the Blank outbound Email Interaction window figure), enable you to access the Standard Responses Library.



Blank outbound Email Interaction window

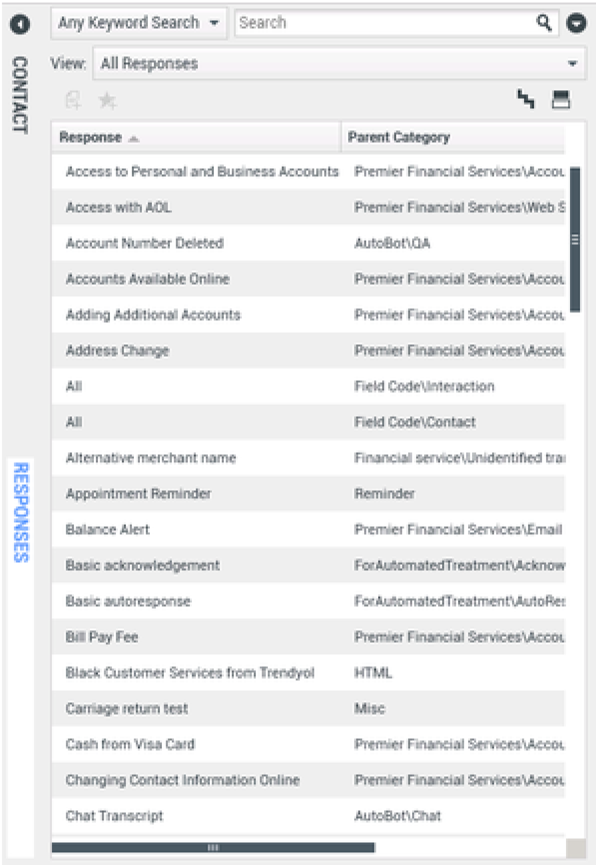
To open the Responses view in *any* interaction window, including email, chat, and voice, click the Responses button, which is located on the left-hand side of the interaction window and below the Contact button.

2. The Responses view is displayed. The Responses view has two view modes: tree mode (see the Responses tree-mode view of an interaction window figure) and list mode (see the Responses list-mode view of an interaction window figure).



Responses tree-mode view of an interaction window

Similar to the tree view of Microsoft Windows Explorer, the tree view enables you to explore folders of responses by category. The list mode enables you to view the response documents in a table view that is sortable by document name or folder name.

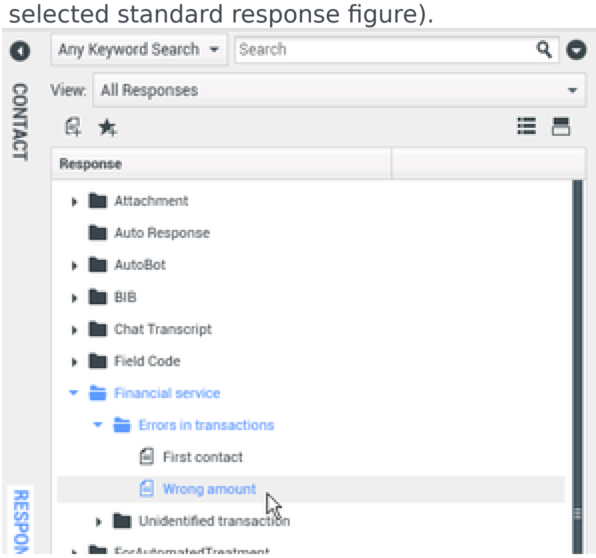


Responses list-mode view of an interaction window

Click folders in the tree view to open them and view sub-folders and documents.

You can also search for a specific response by title or content by using the search functionality (see Lesson: Searching the Standard Response Library for a standard response).

3. To view or use a standard response, click the document in either mode (see the Responses view, with a selected standard response figure).



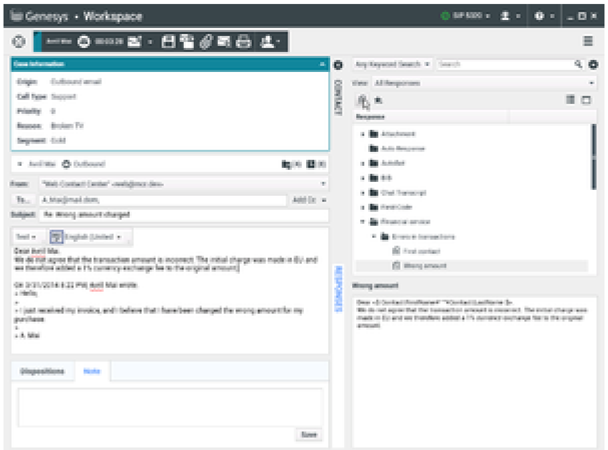
Responses view, with a selected standard response

When a document is highlighted, you can perform the following actions:

- Preview the contents of the response by clicking `Show Detail` (see the Responses view, displaying the details of the selected response figure).

Responses view, displaying the details of the selected response

- Insert the response into your interaction at the insertion point by one of the following methods:
  - Press **Enter** on your keyboard.
  - Click `Insert Standard Response Text` ().
  - Right-click the response and select `Insert Standard Response Text` from the context menu.
  - Double-click a response to automatically insert the content at the insertion point in the text field. [**Added:** 8.5.105.12]
- Add the document to your list of favorite responses by clicking `Add Standard Response into Favorite Responses`. You can then filter the tree mode or list mode to show only your favorites by clicking the `View` drop-down list and then selecting `Favorite Responses` instead of `All Responses`. The standard response inserted into an outbound email interaction figure shows a selected response in the tree-mode view, the associated Details view, and inserted into the email interaction text composition area. You can add multiple responses in the same interaction.



A standard response inserted into an outbound email interaction

4. Complete and send or transfer the interaction (see Lesson: Replying to a inbound email interaction or Lesson: Creating and sending a new email interaction to a contact).

End

Lesson: Using a shortcut to insert a standard response into an email interaction

[**Added:** 8.5.118.10]

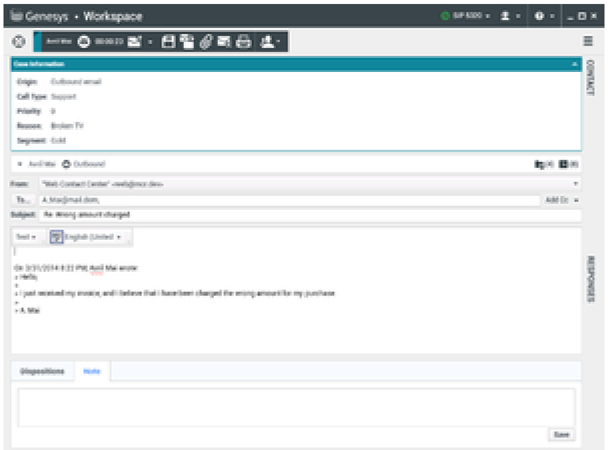
Purpose: To use a shortcut to insert a pre-written response to a customer interaction (email, chat, SMS, MMS, Twitter, Facebook, and so on).

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have accepted the inbound or transferred email interaction or created a new interaction (see Lesson: Handling an inbound email interaction or Lesson: Creating and sending a new email interaction to a contact).
- If you are handling an inbound email interaction, you have clicked `Reply` or `Reply All` in the inbound Email Interaction window (see Lesson: Replying to a inbound email interaction).

Start

1. If your account is set up to use standard responses, all Workspace interaction windows, such as the Email Interaction window (see the Blank outbound Email Interaction window figure), enable you to access the Standard Responses Library.



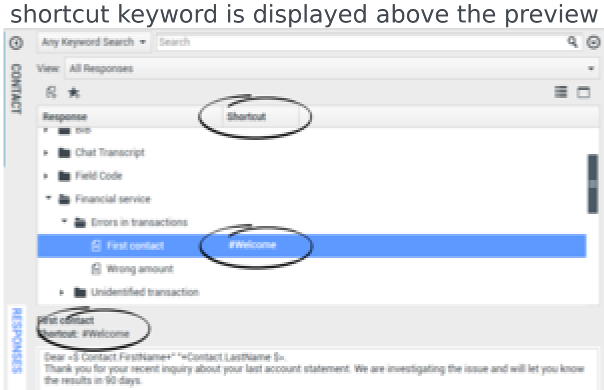
Blank outbound Email Interaction window

You can choose to manually select a response, or your system might be set up to let you enter a shortcut keyword into a text field to automatically add a response. Ask your administrator or supervisor what the *shortcut keywords* and the *shortcut prefix* are for your company.

2. To use a shortcut, type the prefix specified by your company (for example, "#") followed by the keyword for the response you want to insert, followed by Ctrl+Space. If your prefix is "#" and the keyword is "sale", then you type: #sale+Ctrl+Space.
   The body of the standard response is added to your interaction.

3. To open the Responses view in *any* interaction window, including email, chat, and voice, click the `Responses` button, which is located on the left-hand side of the interaction window and below the `Contact` button.

4. To learn what the shortcut keywords are, navigate the responses tree in the `Responses` or the `Responses with predefined Shortcut` view and select the response you are interested in. The shortcut keyword is displayed above the preview and in the Shortcut column of the responses tree.



End

Lesson: Searching the Standard Response Library for a standard response

Purpose: To use search tools to find a response in the Standard Response Library.

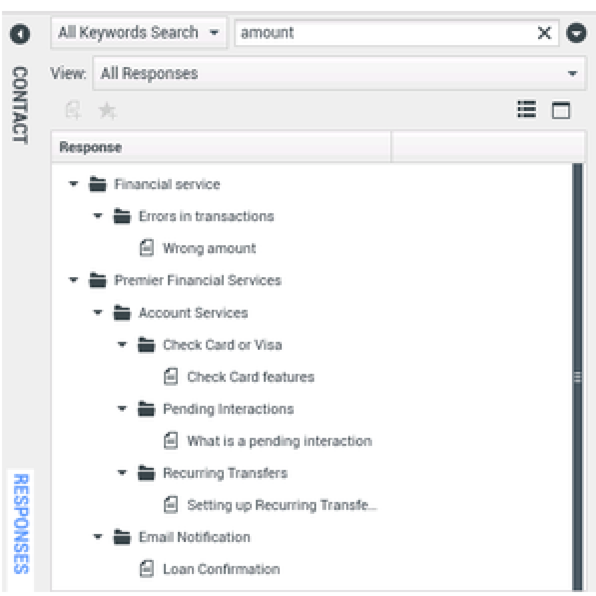
> ### Tip
> If you are configured to use responses, the Responses view is available for the Email, Chat, SMS, and Voice Interaction windows.

Prerequisites

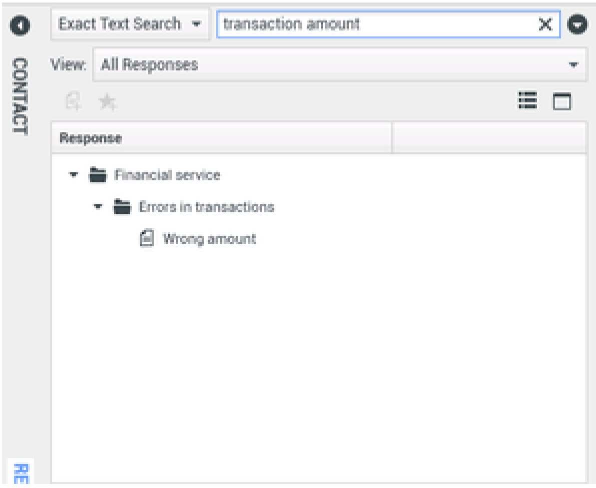
- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have accepted the inbound or transferred interaction or created a new interaction.

Start

1. You can use either the tree mode or list mode to search manually through the list of standard responses (see Lesson: Finding and inserting a standard response into an email interaction), or you can use keyword searches to identify quickly the responses that contain the information that you want to send to your contact. In the responses view, type a word or words into the search field and then click the magnifying glass or press `Enter` to return all documents that meet the criteria that you specify (see the Responses All Keyword Search figure and the Responses Exact Text Search figure). The Responses search function enables you to perform three standard searches:
   - `Any Keyword Search`--Find all responses that contain at least one of the specified keywords
   - `All Keyword Search`--Find all responses that contain all of the specified keywords
   - `Exact Text Search`--Find all responses that contain the specified keywords in the order in which they are specified.

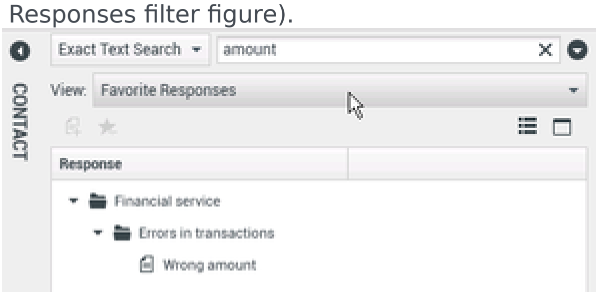


Responses All Keyword Search



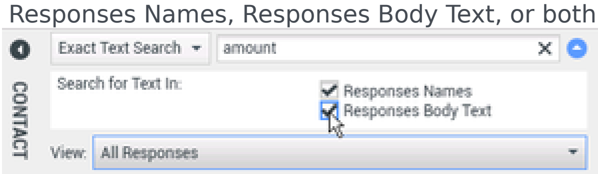
Responses Exact Text Search

2. Use the `View` menu to search through All Responses or your Favorite Responses (see the Favorite Responses filter figure).



Favorite Responses filter

3. Click the `Show Advanced Search Options` button (two downward pointing chevrons) to display the advanced filtering options. The advanced filtering options enable you to specify whether to search in Responses Names, Responses Body Text, or both (see the Advanced response filtering options figure).



Advanced response filtering options

4. When you have found the responses for which you are searching, you can insert it into your interaction at the insertion point (go to Step 3 of Lesson: Finding and inserting a standard response into an email interaction) or you can read it to a contact on a voice call.

End

Lesson: Searching the Standard Response Library for a suggested response

Purpose: To use a suggested response from the Standard Response Library.

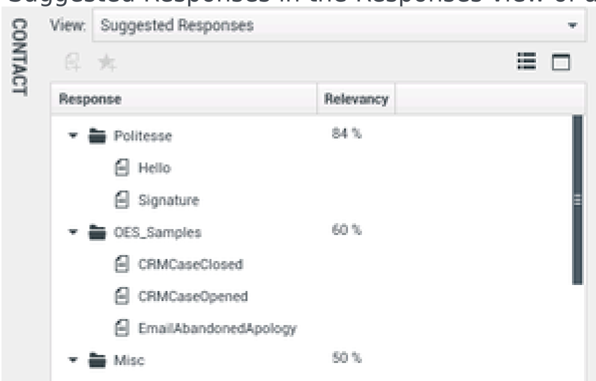
Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).

- You have accepted the inbound or transferred email interaction.

Start

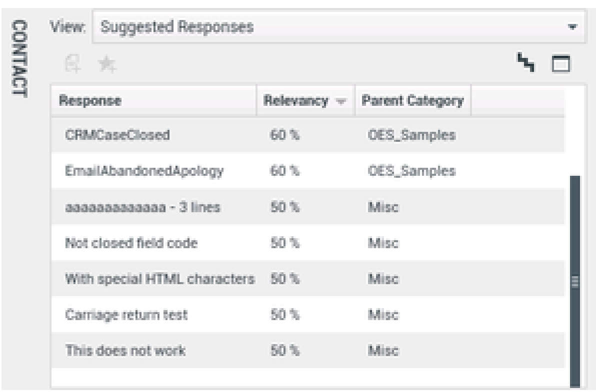
1. In the Responses view, from the `View` menu, select `Suggested Responses` (see the Tree view of Suggested Responses in the Responses view of a reply email interaction window figure).



Tree view of Suggested Responses in the Responses view of a reply email interaction window

Suggested responses are displayed in either list view or tree view. In list view (see the List view of the Suggested Responses view figure), you can sort by column. Click a column heading to sort by that field; click the same column head to reverse the sort order.

In tree view (see the Tree view of Suggested Responses in the Responses view of a reply email interaction window figure), the responses are sorted by relevancy to the inbound interaction to which you are replying.



List view of the Suggested Responses view

2. To search through the Suggested Responses list, you can use either the tree mode or list mode to search manually through the list of standard responses (see Lesson: Finding and inserting a standard response into an email interaction), or you can use keyword searches to identify quickly the responses that contain the information that you want to send to your contact (see Lesson: Finding and inserting a standard response into an email interaction).
3. When you have found the response for which you are searching, you can insert it into your interaction at the insertion point (go to Step 3 of Lesson: Finding and inserting a standard response into an email interaction) or you can read it to a contact on a voice call.

End

Related Information

- Responses
- Voice Interaction
- Chat Interaction
- Inbound Email
- Outbound Email
- SMS and MMS Interactions

Apply Disposition Codes

[**Modified:** 8.5.108.11, 8.5.146.06]

The Workspace Disposition Code view enables you to assign to an ongoing or terminated interaction a code that qualifies or specifies the outcome of the interaction.

The Disposition Code view is part of the Interaction window. It contains either a checklist of options, or a hierarchy of folders containing options that you can click to specify the outcome of the interaction.

Your system might be configured so that you cannot click `Mark Done` until you have selected a disposition code, or you might be able to mark an interaction as Done without specifying a disposition. Your system might be configured so that the Disposition Code view is not displayed.

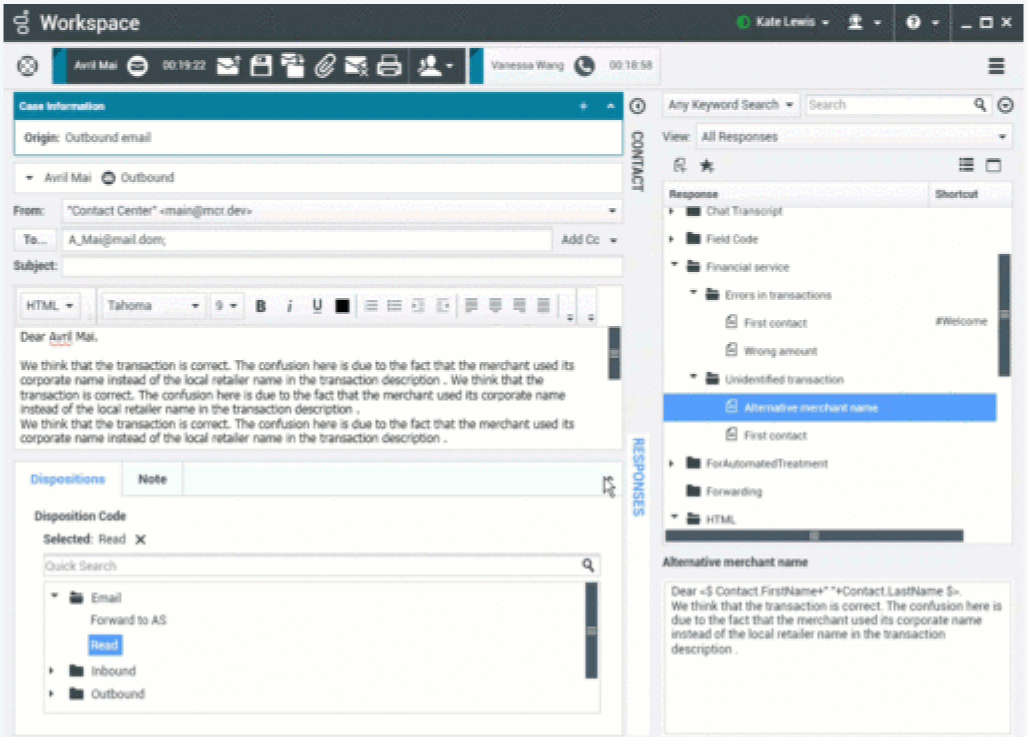
This lesson contains the following section:

- Assigning Disposition Codes

This lesson demonstrates assigning a disposition to a voice interaction; however, this procedure is applicable to any type of interaction for which you have been enabled to specify a disposition.

Tip

Minimizing and Restoring the Disposition Code and Note views. If you need more space in the Interaction view you can minimize or restore the Disposition tab and Note tab area by clicking the chevron. [**Added:** 8.5.146.06]



Click the image if animation does not start.

Important

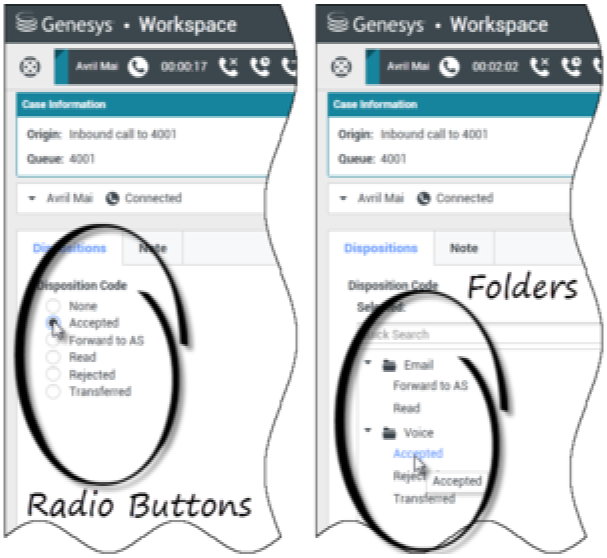
The **Dispositions** tab and the **Note** tab do not become available until the call is established.

Assigning Disposition Codes

Many contact centers attach data to interactions that specifies the outcome of each interaction. The outcomes are defined by the administrators of the contact center. Each outcome, or disposition, is assigned a disposition code that enables contact center personnel or systems to determine whether an interaction was successful, transferred, or whether a follow-up interaction is required. If you apply a new disposition code to an interaction that already has a disposition code, the old disposition code is overwritten.

Workspace employs one of two interfaces that enable you to assign a disposition code to your interaction quickly and easily:

- A simple radio-button interface
- A hierarchy of folders that contain codes



Interaction views that show the two different types of dispostion code tabs, Radio Buttons and Folders

Important

In some Outbound Campaign interactions, the Disposition Code view has additional features. See Lesson: Handle Outbound-Campaign Voice Interactions.

Lesson: Applying a disposition code to an interaction

Purpose: To attach information about the outcome of the current or selected interaction.

A disposition code can be set at different times depending on the configuration of your system. Your system might require you to set the disposition code before you click `Mark Done` to complete an interaction. Your system might require you to set the disposition code before you transfer or conference the interaction.

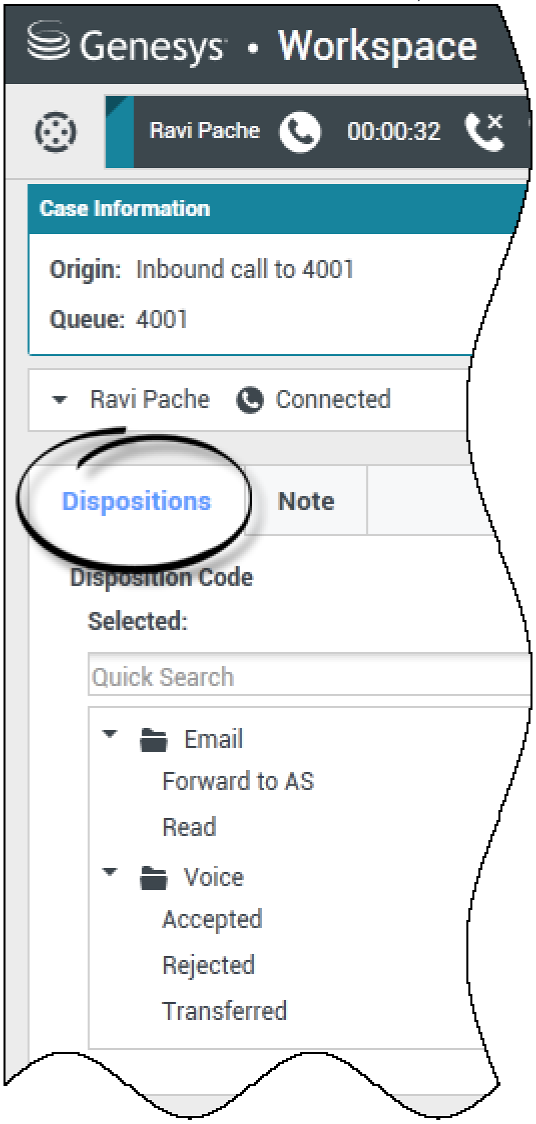
The following procedure assumes that you must set the disposition code before you click `Mark Done`.

Prerequisites

- You are logged in to Workspace (see Getting Started).
- You have an open Voice interaction (see Receiving a Voice Interaction).
- Your assigned role requires you to assign disposition codes to interactions.

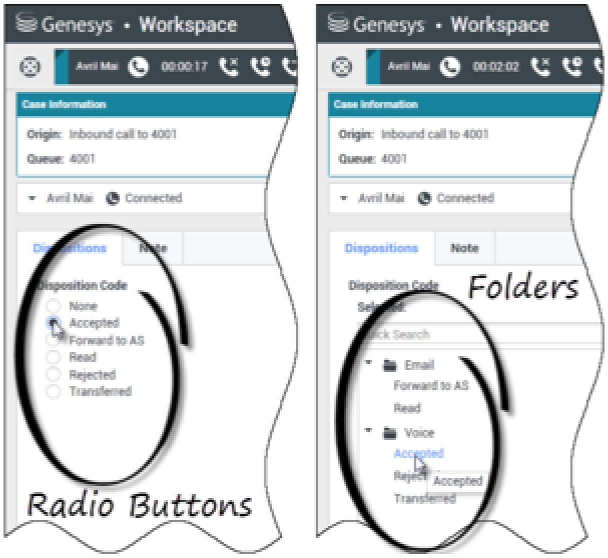
Start

1. If the customer has not ended the call, but you are ready to hang up, in the active Interaction window (see Receiving a Voice Interaction), click `End Call` (the phone-set button that has a red X; see the Inbound Voice Interaction window, with no disposition code set figure).



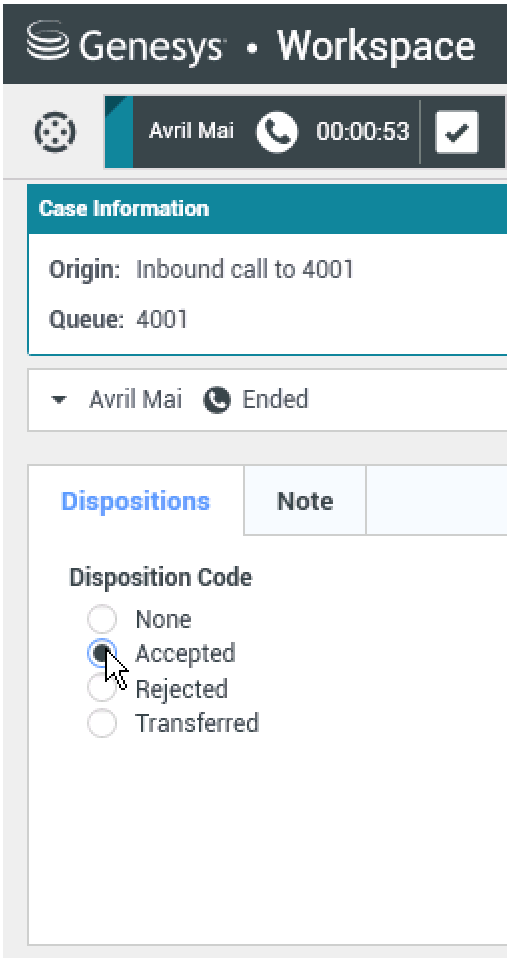
Inbound Voice Interaction window, with no disposition code set

2. Click the `Dispositions` tab (see the Dispositions view figure) to display the Disposition Code selector. You will see either a checklist with radio buttons or a hierarchy of folders.



Interaction views that show the two different types of dispostion code tabs, Radio Buttons and Folders

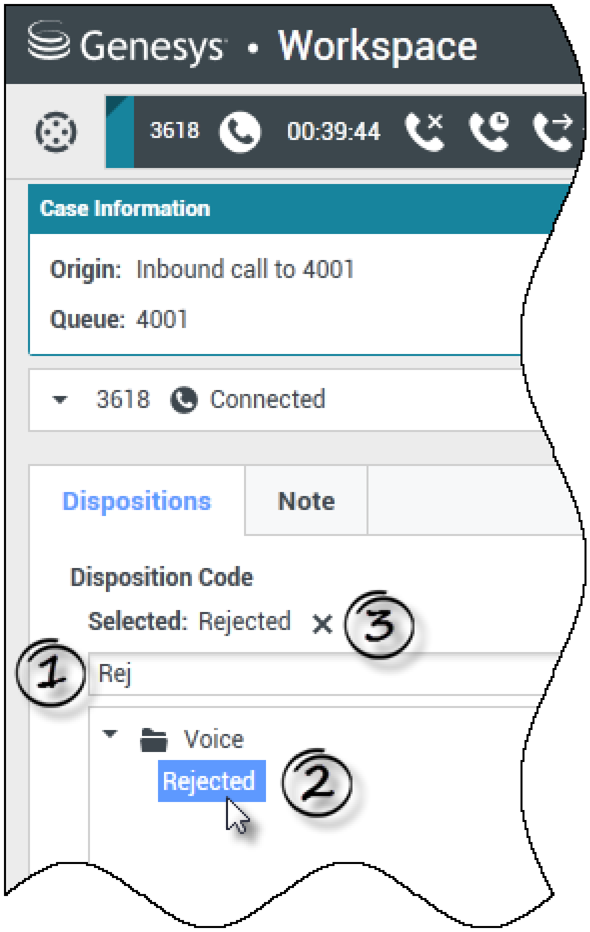
3. To choose a disposition, do one of the following actions:
    - If you have the checklist interface, click the `Disposition Code` radio button to specify the outcome of the call. (The available options are configured by your system administrator, and might not be the same values that are shown in the figures in this lesson.)



Voice Interaction window, with disposition code set

- If you have the folder hierarchy interface, perform these steps:
  1. In the Disposition Code **Quick Search** field, enter the name of the code that you want to find. Quick search works as a "start typing" search. Results are returned as you type. All folders are opened and the view is filtered to show only codes that match what you entered.

     Alternatively, you can just browse through the folder hierarchy to find the disposition code that you want to use.
  2. In the folder hierarchy view, when you select a disposition, its name is displayed next to the **Selected** label. You can deselect the disposition by clicking the **X** next to it.



Use the Quick Search to find a disposition. Click it to select it.

4. Click `Mark Done`.
5. If the Interaction window does not close automatically, close the Interaction window after you have clicked `Mark Done` for each of the active interactions.
6. Complete your after-call work.

End

Related Information

- Disposition Code
- Voice Interaction
- Chat Interaction
- Inbound Email
- Outbound Email
- SMS and MMS Interactions

- Internal IM

Contact and Interaction Management

These lessons introduce you to Workspace contact management and interaction search. The Workspace Contact History view enables you to view and manage previous interactions with a contact. The My History view and the Interaction Search view enable you to find interactions in your interaction database by using a variety of criteria.

This topic contains the following sub-topics:

- Manage Contact History
- Manage Your History
- Manage Contacts and Contact Information
- Find Interactions

Related Information

- Contact History
- Contact Directory
- Contact Search
- Interaction Search
- My History

Manage Contact History

[**Modified:** 8.5.113.11, 8.5.110.13, 8.5.117.18, 8.5.136.07]

The Workspace Contact History view enables you to view and manage previous interactions with a contact.

Managing Contact History

The Contact History view enables you to view and manage previous interactions with a contact. You can find and select previous interactions by using the following views:

- Contact Directory (see Lesson: Finding and viewing an interaction in the contact database)
- Information view of the current interaction (for an example see Lesson: Handle A Voice Call). **Note:** The current interaction is highlighted in the Contact History view if your administrator has enabled this feature. [**Added:** 8.5.117.18]

Interactions are stored with various attributes. You can use these attributes to find specific interactions. Search results are shown in the interactions table. You can sort, filter, and perform actions on the interactions that you select. Use the Contact History view to do the following:

- Find interactions for the current contact or the currently selected contact.
- Perform the following actions on selected interactions:
    - Mark In-Progress voice and email [**Added:** 8.5.110.13] interactions as Done
    - Delete an outbound email interaction [**Added:** 8.5.110.13]
    - Reply or Reply All to inbound email interaction
    - Open outbound email interaction
    - Forward inbound and outbound email interactions that are marked as Done [**Added:** 8.5.113.11]
    - Resend outbound email interaction
    - Print an email interaction
- View information about selected interactions

This section contains the following procedures:

- Lesson: Finding and viewing an interaction in the contact database
- Lesson: Finding and viewing an interaction in the contact view of the Interaction window
- Lesson: Using the History tab Quick Search to find an interaction
- Lesson: Using the History tab Advanced Search to find an interaction

Lesson: Finding and viewing an interaction in the contact database

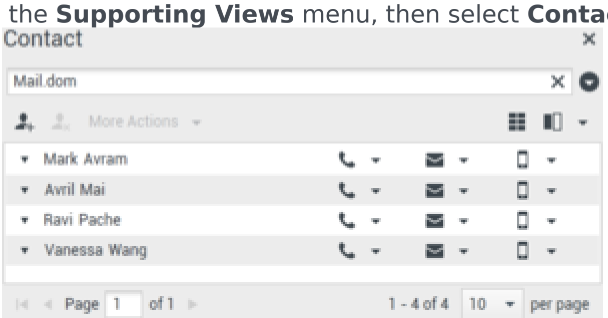
Purpose: To find and view or modify existing interactions for a contact in the contact database.

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Workspace (see Lesson: Logging in to Workspace).

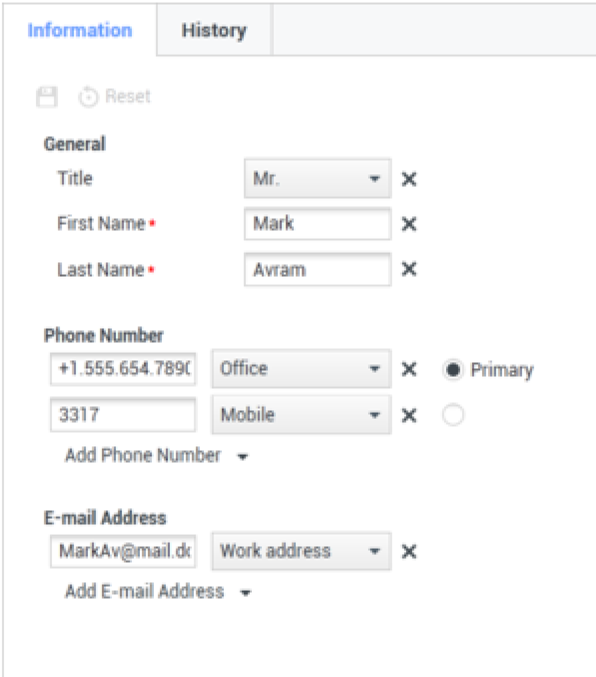
Start

1. In the Main Window, click the **Access and use Workspace supporting views** button (☰) to display the **Supporting Views** menu, then select **Contact Directory**.



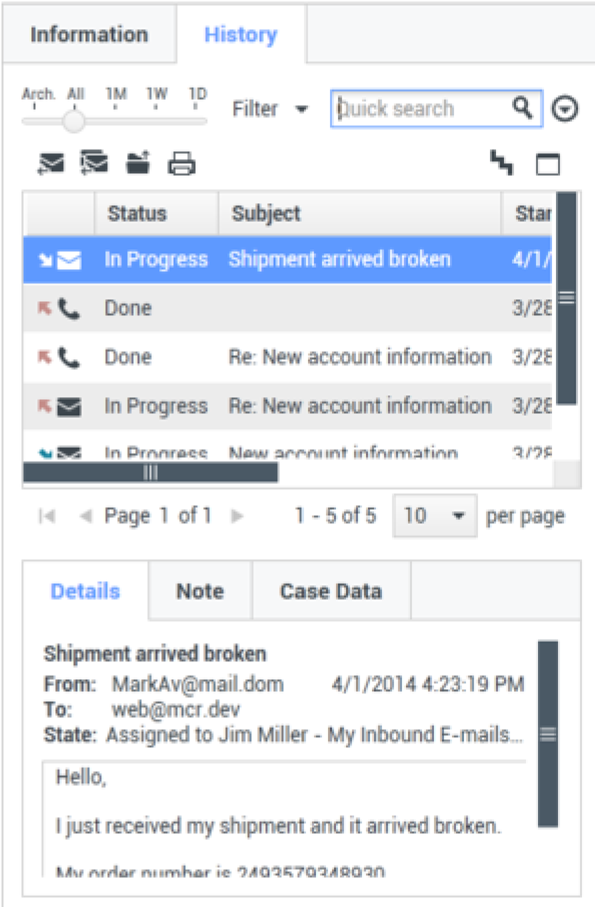
Contact Directory tab

2. Click in the `Quick Search` field and enter the name of the contact for whom you are searching to find the contact in the contact database.
3. Click the magnifying-glass icon, or press `Enter`, to begin the search.
4. Click the name of the contact in the search-results table or list. The Grid view in newer environments displays a sortable list of all of the contacts in the contact database that match the search criteria.
5. In the `Show Details Panel` drop-down list, display the Details panel (see the Contact Details view, displaying the Contact Information tab figure).



Contact Details view, displaying the Contact Information tab

6. Click the `History` tab to display the contact History view (see the Contact Details view, displaying the Contact History tab figure).



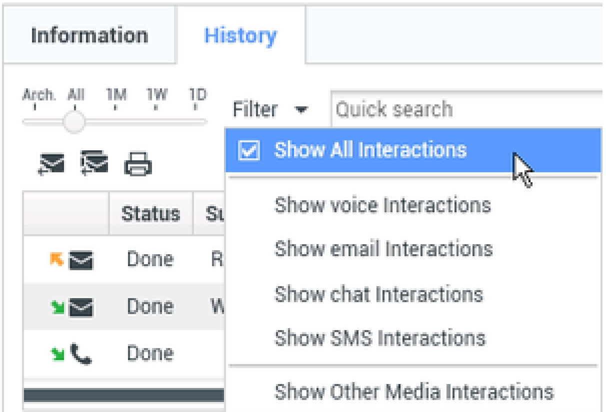
Contact Details view, displaying the Contact History tab

7. If the contact history contains more than one interaction, specify the time interval that is to be used to filter your search results by using the `Chronology` slider.

The slider has five positions that represent different time intervals:

- **Arch.**—Search the database for messages that have been archived (available only in older environments).
- **All**—Search the entire database from the most recent interaction, back to the earliest interaction.
- **1M**—Search the database from the most recent interaction, back to one month ago.
- **1W**—Search the database from the most recent interaction, back to one week ago.
- **1D**—Search the database from the most recent interaction, back to one day ago.

8. If complete or filtered contact history contains more than one interaction, use the Type filters to search only for interactions of a specific type. Select the filter type from the drop-down list to turn the filters on and off. When a filter is on, a check mark appears beside its name in the menu.



The interaction filters might include the following types:

- Show All Interactions
- Show Voice Interactions
- Show E-mail Interactions
- Show Chat/Instant Message Interactions
- Show SMS Interactions
- Show Other Media Interactions—Includes workitems and social-media interactions

Your administrator might also include filter types that are related to your specific role in the company, such as the type of customer that your deal with or the business area for which you are responsible.

- If complete or filtered contact history contains more than one interaction, you can sort the contents of the search-results table by an attribute. The attributes are defined by your system administrator. To sort the interactions by one of the attributes, click the column headings that match the attribute that you wan to use to sort the results (see the History View for the current or selected contact figure). Your available search criteria might include one of the following:
  - **Status**—The disposition code that was assigned to the interaction, if any
  - **Subject**—For email interactions only
  - **Start Date**—The date and timestamp when the interaction was first received
  - **End Date**—The date and timestamp when the interaction was marked Done.
- Find the interaction that you want to view by using one of the following search types:
  - **Quick Search**—Enables you to search for any attribute that begins with the value that you enter. For example, you could find all interactions that are related to the subject of `billing`. See Lesson: Using the History tab Quick Search to find an interaction. See also Finding Interactions to learn about the expanded search capabilities introduced in Workspace 8.5.104.15.
  - **Advanced Search**—Enables you to use multiple criteria to refine your search. The Advanced Search pane contains drop-down lists of search criteria, such as `Status`, `Start Date`, and `Subject`. It also contains drop-down lists with modifiers that determine how the criteria will affect the search. See Lesson: Using the History tab Advanced Search to find an interaction. See also Finding Interactions to learn about the expanded search capabilities introduced in Workspace 8.5.104.15.

Note: The table view is not sortable when it is displaying search results. The sort order of search results is predefined.

- Workspace enables you to view contact interactions either by attributes or as threads. Click the `Show Interactions in Grid View/Show Interactions in Tree View` button (/) to specify how the Contact History panel is displayed.
  Grid View displays interactions by attribute and Tree View displays interactions chronologically by thread. A thread is a group of two or more interactions with a single contact that were created in the same context (email replies, multichannel conversations, social-media threads, and so on).
- Click an interaction to select it. The `Details` panel displays information about interactions on the `Details` tab, the `Note` tab, and the `Case Data` tab (see the History View for the current or selected contact figure).
  - If your account is configured to enable you to see the detailed status of the in-progress interaction, the status of the interaction is displayed in the `Details` tab. If the status of an email interaction in the Contact History view is in one of the in-progress states, when you select the interaction, the `Open` button ( ) is displayed (if the email is in a queue, a workbin, or in routing—including outbound in-progress emails).
    a. Click `Open` to open the email interaction in the current active interaction window, or in a new E-mail Interaction window if you are opening the email from the Main Window Contact History view.
    b. After you open the in-progress email interaction, you can read or handle it as an inbound email interaction or an outbound email interaction (refer to Lesson: Replying to a inbound email interaction and Lesson: Creating and sending a new email interaction to a contact). You can also click `Put back in original location` ( ) to return the email interaction back to the In-Progress workbin or into a queue.
  - If you have the correct permissions you can print an email interaction. Click **Print** ( ) to open the Print Preview window. [**Added:** 8.5.101.14]
  - If you have the correct permissions to enable you to manage contact data, choose one of the following actions:
    - **Mark Done**—Displayed only if an interaction is still in progress. If you complete an interaction, select it in the interactions table, and then click `Mark Done`. The status of the interaction will be changed to `Done`.
    - **Reply/Reply All**—Reply to the sender of the email message and other recipients. See Lesson: Replying to a inbound -mail interaction.
- If you have the correct permissions and you select an In-Progress outbound email interaction, you can delete it ( ). [**Added:** 8.5.110.13]
- If you have the correct permissions, for email interactions that have been marked as `Done`, you can click the **Forward** button ( ) to create a new outbound email interaction that includes the selected interaction in the Forward Email interaction window. [**Added:** 8.5.113.11]
- When you have finished working on the selected interaction in the Main Window, clear the search results by clicking the X button beside the search field.
  When you have finished working on the selected interaction in the Interaction window, close the Information view by clicking the `Contact` button on the right-hand side of the current interaction.

End

Lesson: Finding and viewing an interaction in the contact view of the Interaction window

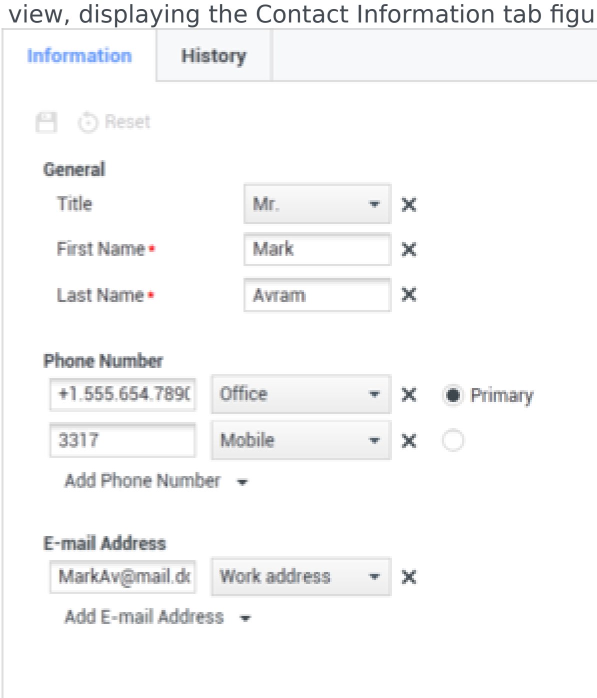
Purpose: To find and view or modify existing interactions for a contact in the contact database from an active interaction.

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have an active interaction.

Start

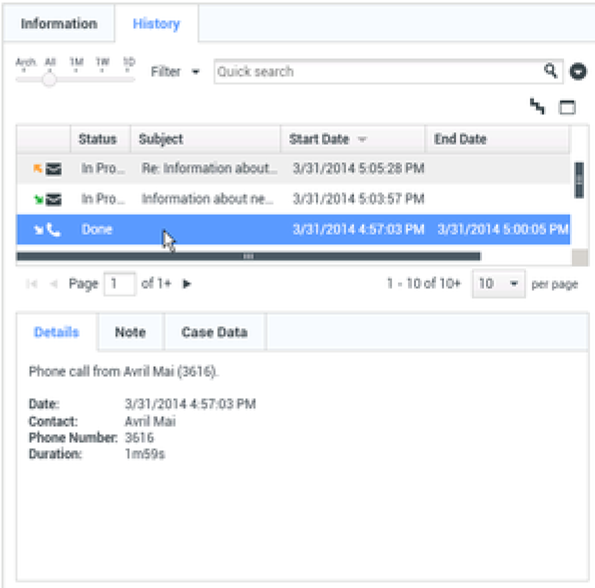
1. In the active interaction window, click `Contact` to display the `Contact` tab (see the Contact Details view, displaying the Contact Information tab figure).



Contact Details view displaying the Contact Information tab

The `Information` tab displays information about the current contact.

2. Click the `History` tab to display the list of interactions for the current contact (see the History View for the current or selected contact figure).



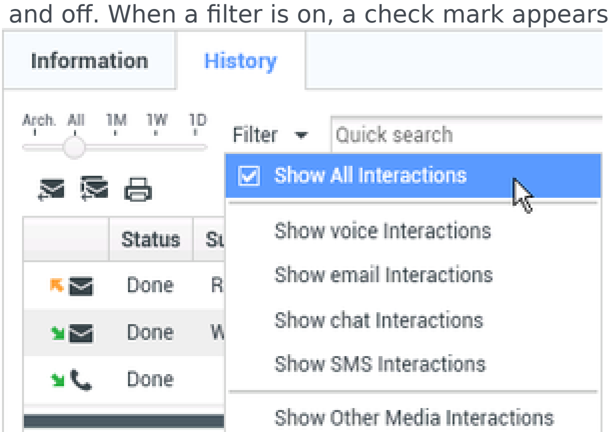
History View for the current or selected contact

3. If the contact history contains more than one interaction, specify the time interval that is to be used to filter your search results by using the `Chronology` slider.

The slider has five positions that represent different time intervals:

- **Arch.**—Search the database for messages that have been archived (available only in older environments).
- **All**—Search the entire database from the most recent interaction back to the earliest interaction.
- **1M**—Search the database from the most recent interaction back to one month ago.
- **1W**—Search the database from the most recent interaction, back to one week ago.
- **1D**—Search the database from the most recent interaction, back to one day ago.

4. If complete or filtered contact history contains more than one interaction, use the Type filters to search only for interactions of a specific type. Select the filter type from the drop-down list to turn the filters on and off. When a filter is on, a check mark appears beside its name in the menu.



The interaction filters might include the following types:

- Show All Interactions
- Show Voice Interactions
- Show E-mail Interactions
- Show Chat/Instant Message Interactions
- Show SMS Interactions
- Show Other Media Interactions—Includes workitems and social-media interactions

Your administrator might also include filter types that are related to your specific role in the company, such as the type of customer that your deal with or the business area for which you are responsible.

5. If complete or filtered contact history contains more than one interaction, you can sort the contents of the search-results table by an attribute. The attributes are defined by your system administrator. To sort the interactions by one of the attributes, click the column headings that match the attribute that you wan to use to sort the results (see the History View for the current or selected contact figure). Your available search criteria might include one of the following:
    - **Status**—The disposition code that was assigned to the interaction, if any.
    - **Subject**—For email interactions only.
    - **Start Date**—The date and timestamp when the interaction was first received.
    - **End Date**—The date and timestamp when the interaction was marked `Done`.
6. Find the interaction that you want to view by using one of the following search types:
    - **Quick Search**—Enables you to search for any attribute that begins with the value that you enter. For example, you could find all interactions that are related to the subject of `billing`. See Lesson: Using the History tab Quick Search to find an interaction. See also Finding Interactions to learn about the expanded search capabilities introduced in Workspace 8.5.104.15.
    - **Advanced Search**—Enables you to use multiple criteria to refine your search. The Advanced Search pane contains drop-down lists of search criteria, such as `Status`, `Start Date`, and `Subject`. It also contains drop-down lists with modifiers that determine how the criteria will affect the search. See Lesson: Using the History tab Advanced Search to find an interaction. See also Finding Interactions to learn about the expanded search capabilities introduced in Workspace 8.5.104.15.
7. Workspace enables you to view contact interactions either by attributes or as threads. Click the `Show Interactions in Grid View`/`Show Interactions in Tree View` button (/) to specify how the Contact History panel is displayed. Grid View displays interactions by attribute, and Tree View displays interactions chronologically by thread. A thread is a group of two or more interactions with a single contact that were created in the same context (email replies, multichannel conversations, social-media threads, and so on).
8. Click an interaction to select it. The `Details` panel displays information about interactions on the `Details` tab, the `Note` tab, and the `Case Data` tab (see the History View for the current or selected contact figure).
    - If you are configured to see the detailed status of the in-progress interaction, the status of the interaction is displayed in the `Details` tab. If the status of an email interaction in the Contact History view is in one of the in-progress states, when you select the interaction, the `Pull` button ( ) is displayed (if the email is in a queue, a workbin, or in routing—including outbound in-progress emails).
        a. Click `Pull` to open the email interaction in the current active interaction window, or in a new E-mail Interaction window if you are opening the email from the Main Window Contact History

view.

b. After you pull the in-progress email interaction, you can read or handle it as an inbound email interaction or an outbound email interaction (refer to Lesson: Replying to a inbound email interaction and Lesson: Creating and sending a new email interaction to a contact). You can also click `Put back in original location` () to return the email interaction back to the In-Progress workbin or into a queue.

- If an interaction is still in progress, you can click **Mark Done** (). The status of the interaction will be changed to Done.
- If you have the correct permissions you can print an email interaction. Click **Print** () to open the Print Preview window. [**Added:** 8.5.101.14]
- If you have the correct permissions and you select an In-Progress outbound email interaction, you can delete it (). [**Added:** 8.5.110.13]
- If you have the correct permissions, for email interactions that have been marked as `Done`, you can click the **Forward** button () to create a new outbound email interaction that includes the selected interaction in the Forward Email interaction window. [**Added:** 8.5.113.11]
- If you have the correct permissions to enable you to manage contact data, you can use the **Change Contact** button to assign a different contact for the selected interaction.

9. When you have finished working on the selected interaction in the Main Window, clear the search results by clicking the X button beside the search field.
When you have finished working on the selected interaction in the Interaction window, close the Information view by clicking the `Contact` button on the right side of the current interaction.

End

Lesson: Using the History tab Quick Search to find an interaction

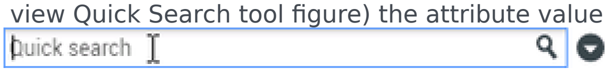
Purpose: To search for any interaction by status, end date, and start date.

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have completed Step 1 of Lesson: Finding and viewing an interaction in the contact database.

Start

1. To search the contact history, in the History tab, type in the `Quick Search` field (see the Contact History view Quick Search tool figure) the attribute value for which you are searching.



Contact History view Quick Search tool

> **Important**
>
> It typically applies a "starts with" for each word of the criteria in any of the attributes selected by your administrator.

2. Click the magnifying-glass icon, or press `Enter`, to search for the criteria that you have entered. Your search results are displayed in the Search Results table (see Lesson: Finding and viewing an interaction in the contact database).
3. Click the X to clear the `Quick Search` field.

End

Lesson: Using the History tab Advanced Search to find an interaction

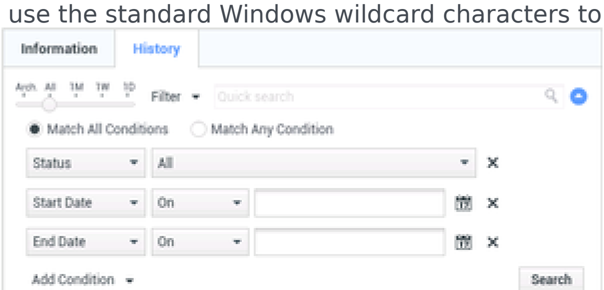
Purpose: To enter multiple interaction criteria to refine your search of the contact database. The Advanced Search pane contains drop-down lists of search criteria, such as `Status`, `Start Date`, `End Date`, and `Subject`. It also contains drop-down lists with modifiers that determine how the criteria will affect the search.

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have completed Step 1 of Lesson: Finding and viewing an interaction in the contact database.

Start

1. To search the contact history, in the History tab, enter in the Advanced Search view (see the Contact History view Advanced Search tool figure) the attribute value or values that you want to find. You can use the standard Windows wildcard characters to expand your search.



Contact History view Advanced Search tool

- From the column of search attributes on the left, choose the attribute within which you want to search from the drop-down lists.
- From the column of search modifiers to the right of the attribute column, choose how the search string should be considered.
Menus for predefined fields, such as `Status`, contain the predefined field names from the database—for example: `All`, `Done`, and `In progress`.

Menus for date fields contain the following choices:

- **On**—The exact date.
- **On or after**—The specified date or any date after.
- **Before**—Before the specified date.
- **Between**—Between the specified dates.

Menus for text fields contain the following choices:

- **Matches**—The specified text string exactly matches the criterion.
- **Note:** Workspace typically applies a "starts with" search for each word of the criteria.

Enter the search value in the text field on the right-hand side. If your criterion is a start date or end date, use the calendar pop-up window to specify the date, then select a `Match Conditions` option to specify whether `All` or Any of the search conditions that you have specified are applied.

2. Click the magnifying-glass icon, or press `Enter`, to search for the values that you have entered. Your search results are displayed in the Search Results table (see Lesson: Finding and viewing an interaction in the contact database).
3. Click the `X` to clear the `Advanced Search` fields and the Search Results table.

End

Related Information

- Contact History
- Contact Directory
- Contact Search
- Interaction Search
- My History

Manage Your History

[**Modified:** 8.5.113.11, 8.5.110.13, 8.5.136.07]

The Workspace My History view enables you to view and manage previous interactions with a contact.

Managing Your History

The My History view enables you to view and manage previous interactions between you and a contact. You can find and select your previous interactions by using the following views:

- `My History` tab in the Main Window
- `My History` window

Interactions are stored with various attributes. You can use these attributes to find specific interactions. Search results are shown in the interactions table. You can sort, filter, and perform actions on the interactions that you select. Use the My History view to do the following:

- Find interactions for contacts whom you have handled
- Perform the following actions on selected interactions:
    - Mark In-Progress voice and email [**Added:** 8.5.110.13] interactions as Done
    - Delete an outbound email interaction [**Added:** 8.5.110.13]
    - Reply or Reply All to inbound email interaction
    - Open outbound email interaction
    - Forward inbound and outbound email interactions that are marked as Done [**Added:** 8.5.113.11]
    - Resend outbound email interaction
    - Print an email interaction
- View information about selected interactions

This section contains the following procedure:

- Lesson: Finding and viewing your interactions in the contact database

Lesson: Finding and viewing your interactions in the contact database

Purpose: To find and view or modify your interactions for a contact in the contact database by using the `My History` view.

Prerequisites

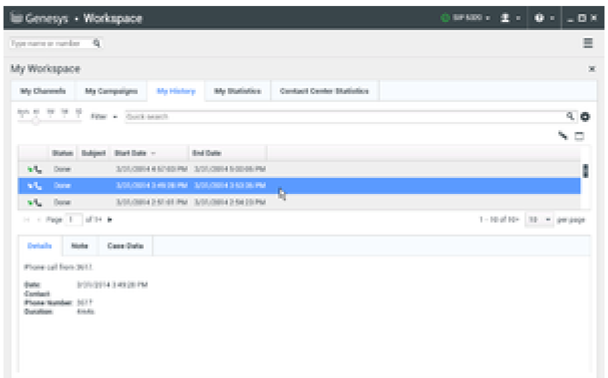
- You are configured to view or manage the contact database.
- You are logged in to Workspace (see Lesson: Logging in to Workspace).

Start

1. Do one of the following:
    - On the Workspace Main Window (see the Main Window, displaying the My History tab in Workspace view figure):

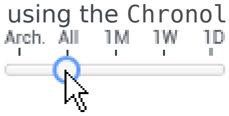
    a. Click `Workspace` to display your workspace.

    b. Click the `My History` tab to display all of your interactions.



Main Window, displaying the My History tab in Workspace view

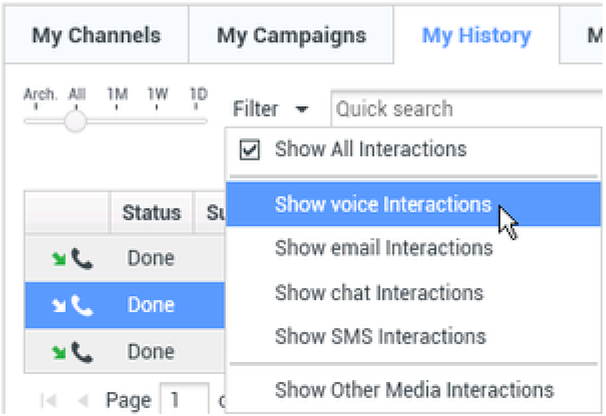
2. To filter your history by date, specify the time interval that is to be used to filter your search results by using the `Chronology` slider.



The `Chronology` slider has five positions that represent different time intervals:

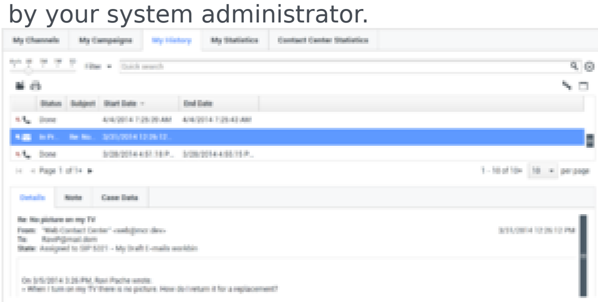
- **Arch.**—Search the database for messages that have been archived (available only in older environments).
- **All**—Search the entire database from the most recent interaction back to the earliest interaction.
- **1M**—Search the database from the most recent interaction back to one month ago.
- **1W**—Search the database from the most recent interaction, back to one week ago.
- **1D**—Search the database from the most recent interaction, back to one day ago.

3. To filter your history by type of interaction, use the Type filters to search only for interactions of a specific type (see the My History view Filter menu figure). The interaction types are: Voice, E-mail, and Chat/Instant Message. Select the types to display from the `Filter` drop-down menu. The `Filter` menu options turn the filters on and off. When a filter is on, a check mark is displayed next to its name in the menu. Your administrator might include filter types that are related to your specific role in the company, such as the type of customer that your deal with or the business area for which you are responsible.



My History view Filter menu.

4. If your history contains more than one interaction, you can sort the contents of the search-results table by an attribute (see the Search results displaying the My History tab figure). The attributes are defined by your system administrator.

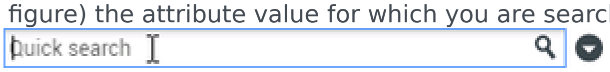

Search results displaying the My History tab

To sort the interactions by one of the attributes, click the column headings that match the attribute that you want to use to sort the results (see the Search results displaying the My History tab figure). Your available search criteria might include one of the following:

- **Status**—Done or `In Progress`
- **Subject**—For email interactions only
- **Start Date**—The date and timestamp when the interaction was first received
- **End Date**—The date and timestamp when the interaction was marked Done

5. The Quick Search enables you to search for any interaction by an attribute value.

   a. To search your history, type in the `Quick Search` field (see the My History view Quick Search tool figure) the attribute value for which you are searching.

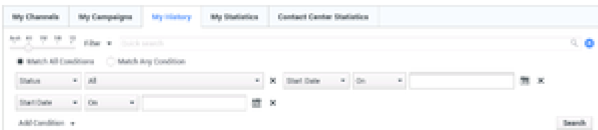
   My History view Quick Search tool

   > ## Important
   > It typically applies a "starts with" for each word of the criteria in any of the attributes selected by your administrator.

   b. Click the magnifying-glass icon, or press `Enter`, to search for the criteria that you have entered. Your search results are displayed in the Search Results table (see Lesson: Finding and viewing an interaction in the contact database).

c. Click the X to clear the `Quick Search` field.

6. The Advanced Search enables you to use multiple criteria to refine your search. The Advanced Search pane contains drop-down lists of search criteria, such as `Status`, `Start Date`, and `Subject` (see the Advanced Search view displaying the My History tab figure). It also contains drop-down lists with modifiers that determine how the criteria will affect the search. See Lesson: Using the History tab Advanced Search to find an interaction.



Advanced Search view displaying the My History tab

7. Workspace enables you to view contact interactions either by attributes or as threads. Click the Show `Interactions in Grid View/Show Interactions in Tree View` button (/) to specify how the Contact History panel is displayed. Grid View displays interactions by attribute and Tree View displays interactions chronologically by thread. A thread is a group of two or more interactions with a single contact that were created in the same context (email replies, multichannel conversations, social-media threads, and so on). The Grid view in newer environments displays a sortable list of all of the contacts in the contact database that match the search criteria.

8. Click an interaction to select it. The `Details` panel displays information about interactions on the `Details` tab, the `Note` tab, and the `Case Data` tab (see the Main Window, displaying the My History tab in Workspace view figure).
   - If you are configured to see the detailed status of the in-progress interaction, the status of the interaction is displayed in the `Details` tab. If the status of an email interaction in the Contact History view is in one of the in-progress states, when you select the interaction, the `Open` button ( ) is displayed (if the email is in a queue, a workbin, or in routing—including outbound in-progress emails).
     a. Click `Open` to open the email interaction in the current active interaction window, or in a new E-mail Interaction window if you are opening the email from the Main Window Contact History view.
     b. After you open the in-progress email interaction, you can read or handle it as an inbound email interaction or an outbound email interaction (refer to Lesson: Replying to a inbound email interaction and Lesson: Creating and sending a new email interaction to a contact).
     You can also click `Put back in original location` ( ) to return the email interaction back to the In-Progress workbin or into a queue.
   - If an interaction is still in progress, you can click **Mark Done** ( ). The status of the interaction will be changed to `Done`.
   - If you have the correct permissions you can print an email interaction. Click **Print** ( ) to open the Print Preview window. [**Added:** 8.5.101.14]
   - If you have the correct permissions and you select an In-Progress outbound email interaction, you can delete it ( ). [**Added:** 8.5.110.13]
   - If you have the correct permissions, for email interactions that have been marked as `Done`, you can click the **Forward** button ( ) to create a new outbound email interaction that includes the selected interaction in the Forward Email interaction window. [**Added:** 8.5.113.11]
   - If you have the correct permissions to enable you to manage contact data, you can use the **Change Contact** button to assign a different contact for the selected interaction.

9. When you have finished working on the selected interaction in the `My History` tab, clear the search

field by clicking the X button beside the search field.

End

Related Information

- My History
- Interaction Search
- Contact History
- Contact Directory
- Contact Search

Manage Contacts and Contact Information

[**Modified:** 8.5.113.11, 8.5.110.13]

The Workspace Contact History view enables you to view and manage previous interactions with a contact.

Managing Contacts and Contact Information

The Contact Directory view enables you to view and manage contacts and contact information. You can manage contacts by using the following views:

- Contact Directory (see Lesson: Finding and viewing an interaction in the contact database)
- Information view of the current voice interaction (see Lesson: Handle A Voice Call)

Interactions are stored with various attributes. You can use these attributes to find specific interactions. Search results are shown in the interactions table. You can sort, filter, and perform actions on the interactions that you select. Use the Contact Directory view to do the following:

- Find interactions for the current contact or the currently selected contact
- If you have the correct permissions, you can perform the following Contact actions:
  - Add a Contact
  - Delete a Contact
  - Update Contact information
  - Merge contacts
  - Unmerge contacts
  - Assign an interaction to a contact
- View information about selected interactions in the Contact History and perform the following actions:
  - Open a selected interaction
  - Resend a selected email interaction
  - Reply or Reply All to a selected email interaction
  - Forward inbound and outbound email interactions that are marked as Done [**Added:** 8.5.113.11]
  - Print a selected interaction
  - Mark open voice and email [**Added:** 8.5.110.13] interactions as done that have the In-Progress state
  - Delete outbound email interactions that have the In-Progress state [**Added:** 8.5.110.13]

This section contains the following procedures:

Lesson: Adding a contact

Purpose: To add a contact to the contact database.

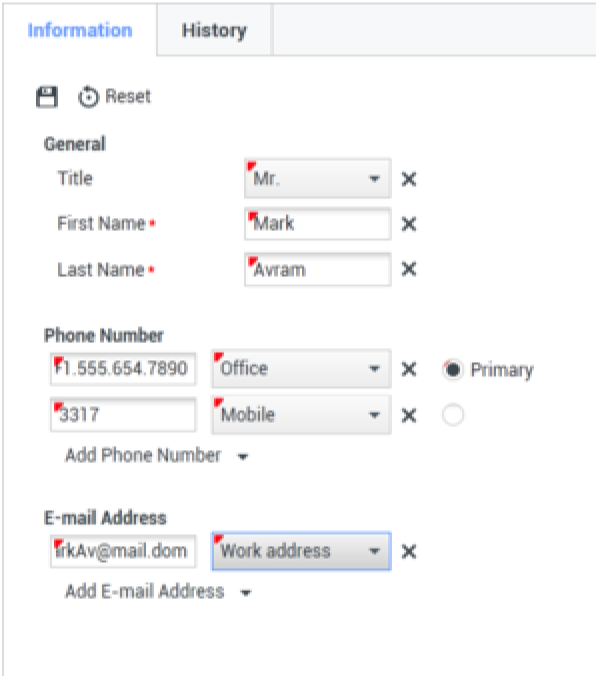
Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Workspace (see Lesson: Logging in to Workspace).

Start

1. If you are configured to do so, you can add new contacts to the contact database by using one of the following Contact Information views:
   - The Contact Directory in the `Contact Information` tab. Click `Create New Contact` () to launch the Add Contact view.
   - The `Contact Information` tab of the current Interaction window.

   The Contact Information view enables you to view and edit contact information (see the Contact Information tab figure). If the contact is already in the contact database, their information will be displayed in this view. Use the fields to add or modify contact information.



Contact Information tab

2. Enter the contact information in the fields. A small red triangle appears in the top left hand corner of the text field to indicate that the information is not saved.
3. Do one of the following:
   - Click the Save icon () to save the information in the contact database.
   - Click the Reset icon () to clear any unsaved changes from the Add Contact view.

Important

(**Added:** 8.5.101.14) Your system might be configured to prevent you from editing some or all contact information after you have created a new contact; therefore, you might not be able to modify some or all contact information fields after you click **Save**. In this scenario, a message box is displayed asking you to confirm that you want to save the information. Review the content carefully before clicking **Save**.

4. If you want to add additional phone numbers and email addresses for the new contact, click the `Add Phone Number` or `Add E-mail Address` link. A new set of fields is added into which you can enter this information.
5. To specify a phone number or email address as the primary contact number or address, click the `Primary` radio button beside the phone number or email address that you want to specify as the primary number or address (respectively) for the contact.

End

Lesson: Deleting a contact

Purpose: To remove or delete a contact from the contact database.

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Workspace (see Lesson: Logging in to Workspace).

Start

1. To delete a contact, you first must find the contact in the contact database and then select it in the Contact Directory (see the Lesson: Using the Team Communicator feature to find a contact).
2. With one or more contacts that you want to delete selected, click the Delete icon ( ).
3. A confirmation dialog box is displayed.
   - Click `OK` to remove the contact permanently from the contact database.
   - Click `Cancel` to cancel the delete-contact function; this leaves the contact in the contact database.
4. When you have finished working on the selected interaction in the `My History` tab, clear the search results by clicking the X button that is displayed next to the search field.

End

Next Steps

- Manage contact records. See Manage Contacts.
- Send or receive an internal Instant Message (IM). See Handle Internal Instant Messaging.

Lesson: Updating contact information

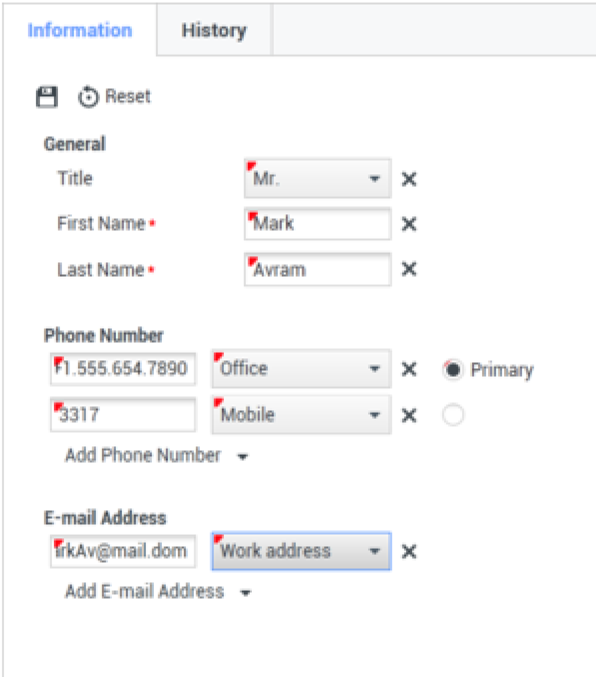
Purpose: To update contact information in the contact database.

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Workspace (see Lesson: Logging in to Workspace).

Start

1. If you are configured to do so, you can edit contacts in the contact database by using the Contact Directory in the `Contact Information` tab. The Contact Information view enables you to view and edit contact information (see the Contact Information tab figure). If the contact is already in the contact database, their information will be displayed in this view. Use the fields to add or modify contact information.



Contact Information tab

2. Enter the contact information in the fields. A small red triangle appears in the top left-hand corner of the text field to indicate that the information is not saved.
3. Do one of the following:
    - Click the Save icon () to save the information in the contact database.
    - Click the Reset icon () to clear any unsaved changes from the Add Contact view.

> ## Important
> (**Added:** 8.5.101.14) Your system might be configured to prevent you from editing some or all contact information after you have created a new contact; therefore, you might not be able to modify some or all contact information fields after you click **Save**. In this scenario, a message box is displayed asking you to confirm that you want to save the information. Review the content carefully before clicking **Save**.

4. If you want to add additional phone numbers and email addresses for the new contact, click the `Add Phone Number` or `Add E-mail Address` link. A new set of fields is added, into which you can enter this information.
5. To specify a phone number or email address as the primary contact number or address, click the `Primary` radio button beside the phone number or email address that you want to specify as the primary number or address (respectively) for the contact.

End

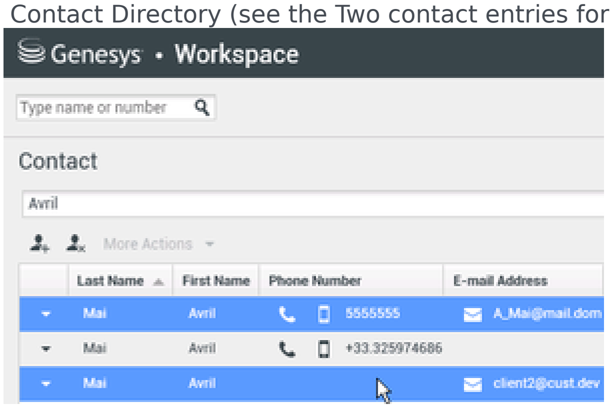
Lesson: Merging contacts

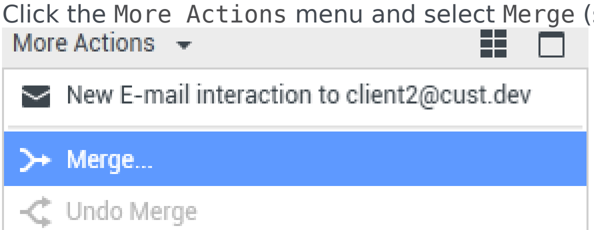
Purpose: To combine two contacts in the contact database.

Prerequisites

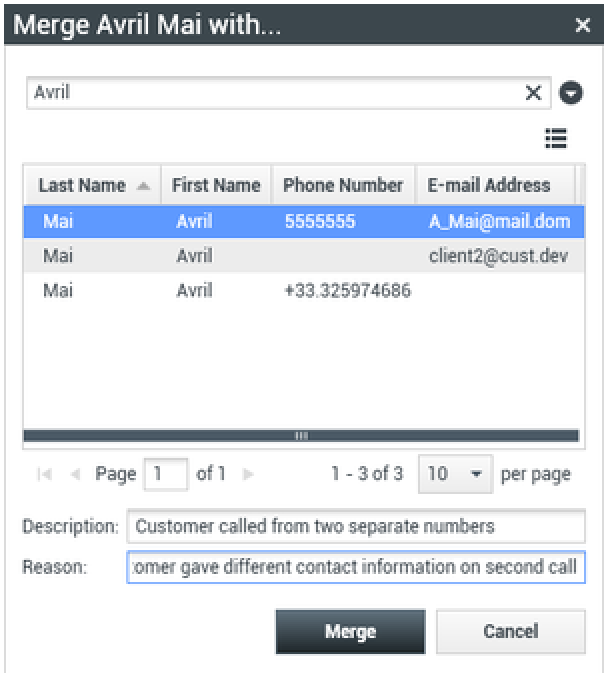
- You are configured to view or manage the contact database.
- You are logged in to Workspace (see Lesson: Logging in to Workspace).

Start

1. If there are two contact entries in the contact database for the same contact, you can merge the two entries into a single entry. To merge a contact, you first must find the contact in the contact database (see the Lesson: Using the Team Communicator feature to find a contact) and then select it in the Contact Directory (see the Two contact entries for the same contact in the Contact Directory figure).


Two contact entries for the same contact in the Contact Directory
2. Click the `More Actions` menu and select `Merge` (see the Contact Directory More Actions menu figure).


Contact Directory More Actions menu
3. The `Merge Contact` dialog box is displayed (see the Merge Contact <name> With dialog box figure).



Merge Contact <name> With dialog box

Use the search tools to find the duplicate contact.

4. Select the duplicate contact.
5. If you are required to enter a description and/or reasons for the merge, use the fields after selecting the duplicate contact.
6. Do one of the following:
    - Click `Merge` to complete the merge of the two selected contact entries.
    - Click `Cancel` to cancel the merge and return to the Main Window.

End

Lesson: Unmerging contacts

Purpose: To unmerge into their original contact entries two contact entries in the contact database that previously have been merged.

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Workspace (see Lesson: Logging in to Workspace).

Start

1. First, find the contact in the contact database (see the Lesson: Using the Team Communicator feature to find a contact).
2. In the Contact Directory, select the contact who is to be unmerged.

3. In the `More Actions` menu, select `Undo Merge`.
4. A confirmation dialog box is displayed.
    - Click `Yes` to unmerge into the original two contact entries.
    - Click `No` to keep the contact merged.

End

Lesson: Manually assigning an interaction to a contact

Purpose: To assign an interaction with an unknown contact to a contact that is in your contact database.

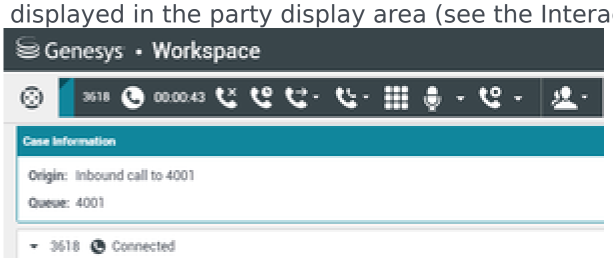
Sometimes a known contact might connect anonymously to your contact center by using a phone, email account, or other media that is not part of the information that is stored about that contact in the contact database.

If your system is not configured to create a new contact automatically for an unknown contact, the Contact Information view for the current interaction window will be blank.

> ### Tip
> You can also use the `Assign Another Contact to This Interaction` button to create a new contact or to manually reassign an interaction that has been assigned to the wrong contact. You can also use the Change Contact view.

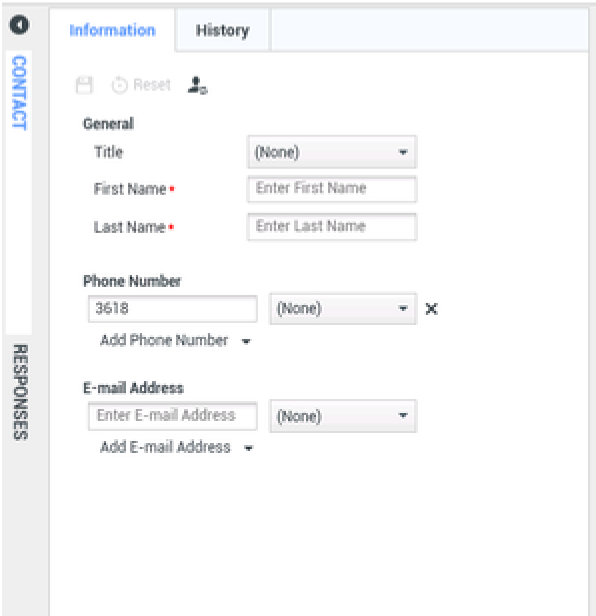
Start

1. If you are handling an interaction that has an unknown contact, there will not be a contact name displayed in the party display area (see the Interaction window with an unknown contact figure).



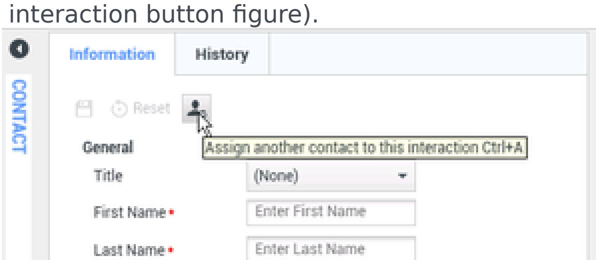
Interaction window with an unknown contact

2. If you identify the contact as being one of your known contacts, you can add the interaction to the history of the contact. Click Contact to display the Contact Directory (see the Information tab of the Contact Directory figure).



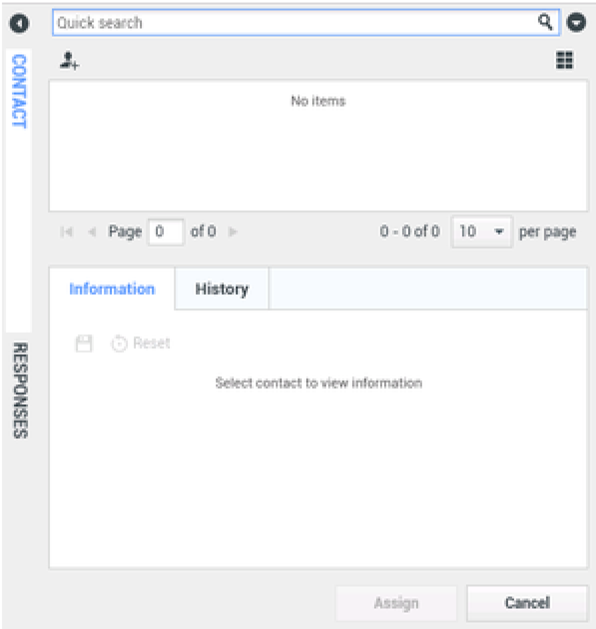
Information tab of the Contact Directory

3. Click `Assign Another Contact to this Interaction` (see the Assign another contact to this interaction button figure).



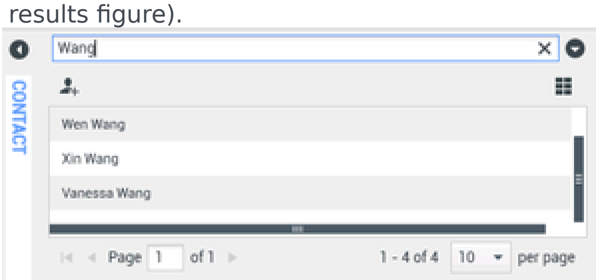
Assign another contact to this interaction button

The Contact Search view is displayed (see the The Contact Search view and Quick Search field figure).



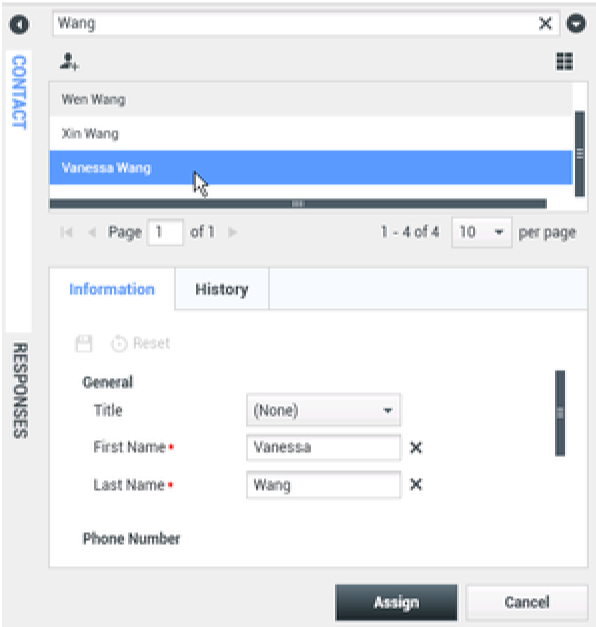
The Contact Search view and Quick Search field

4. In the Quick Search field, enter the name or other identifying information of the contact.
5. Click the magnifying-glass icon to begin the search of the contact database (see the Quick Search results figure).



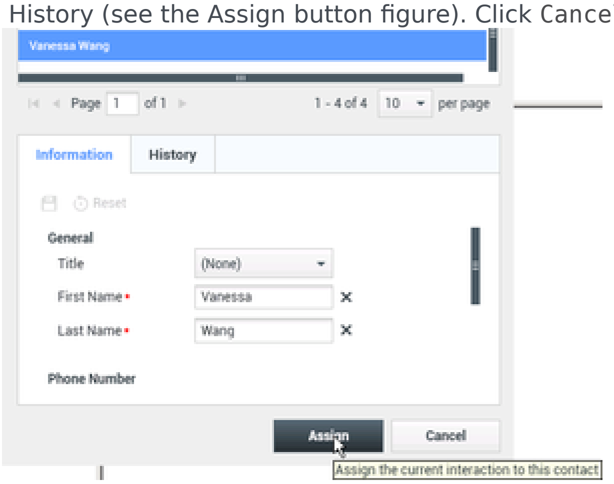
Quick Search results

6. In the Search Results list or grid, select the correct contact (see the Search Results list figure).



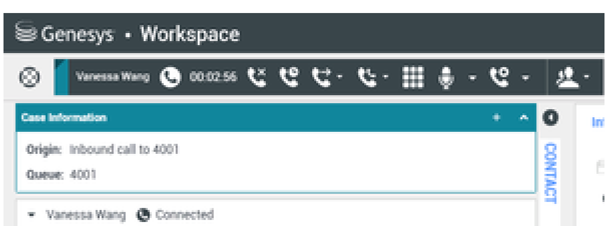
Search Results list

7. Click `Assign` to assign this interaction to the selected contact. The interaction is added to the Contact History (see the Assign button figure). Click `Cancel` to return to the blank Contact Information view.



Assign button

The title bar, tab, and party action area of the interaction window is updated to display the name of the contact (see the Interaction window displaying the name of the contact figure).



Interaction window displaying the name of the contact

End

Related Information

- Contact History
- Contact Directory
- Contact Search
- Interaction Search
- My History

Find Interactions

[**Modified:** 8.5.116.10]

[**Added:** 8.5.104.15]

The **Interaction Search** view enables you to find interactions based on multiple criteria.

Workspace provides you with multiple ways to find interactions in your contact center interaction database. Refer to the Contact and Interaction Management topic for more information about finding contacts and interactions under the following conditions:

- You know which contact you are searching for (use the Contact Directory to find the interactions exchanged with that contact)
- You were the agent who handled the interaction (use the My History view to find the interactions that you have handled)

However, sometimes you must find an interaction, but you no longer remember who the contact was, or whether it was handled by yourself or another agent. The Workspace Interaction Search feature enables you to use the **Interaction Search** view to look for interactions based on one or more criteria, including words in the body or transcript of the interaction.

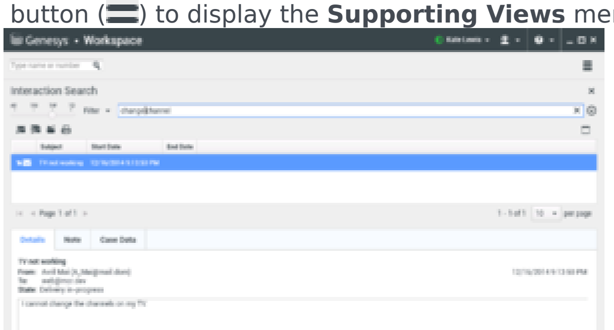
Lesson: Finding and viewing an interaction in the interaction database

Purpose: To find and view or modify existing interactions in the interaction database.

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Workspace (see Lesson: Logging in to Workspace).

Start

1. To display the Interaction Search view, click the **Access and use Workspace supporting views** button () to display the **Supporting Views** menu, then select **Interaction Search**.


Interaction Search view

The Interaction Search view enables you to find interactions using one of two modes:

- **Quick Search**—Quick Search combines a subset of search criteria selected by your administrator. It typically applies a "starts with" for each word of the criteria in any of the attributes selected by your administrator.
- **Advanced Search**—The Advanced Search feature enables you to enter multiple criteria to refine your search. The Advanced Search pane contains drop-down lists of search criteria that enable you to build a complex search based on multiple criteria such as Status, Subject, processing agent, date or date range, and interaction text. Text field searches are based on a "Matches" search, where the request returns interactions that contain, for each typed word, at least one word starting with the specified word.

2. To perform a quick search of the Interaction Database, perform the following steps:

   a. If you know when the interaction for which you are searching was received, use the chronology slider to search the interaction history by time interval.

      The slider has four positions that represent different time intervals:

      - **All**—Search the entire database from the most recent interaction back to the earliest interaction
      - **1M**—Search the database from the most recent interaction back to one month ago
      - **1W**—Search the database from the most recent interaction back to one week ago
      - **1D**—Search the database from the most recent interaction back to one day ago

   b. If you know the type of interaction, such as email, chat, or SMS, for which you are searching, you can refine your search by using the Interaction Type filter. Select and deselect the types of interactions that are to be searched. The items that are displayed depend on the interaction types that you are configured to handle.

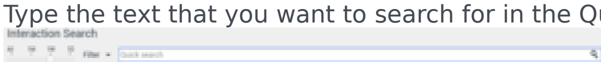
      Click the **Filter** menu to select the interaction types that you want to search. You can select multiple items in the **Filter** menu. The following types are available, by default:

      - Show all Interactions
      - Show voice Interactions
      - Show email Interactions
      - Show chat Interactions
      - Show SMS Interactions
      - Show Other Media Interactions

      When a filter is on, a check mark appears next to it in the **Filter** menu and the button remains highlighted if the "All" filter is not applied.

      > ### Tip
      > Your administrator might have configured additional customized options for the **Filter** menu, such as business area/department (for example: accounts, sales, and service) or customer level (for example: Silver, Gold, and Platinum). Custom filters enable you to refine your search. For example, if you are looking for email interactions about a service request, you can make two selections in the **Filter** menu to refine your search: **Show email Interactions** and **Show Interactions with Service Department**.

   c. Type the text that you want to search for in the Quick Search field.



Interaction Search view Quick Search field

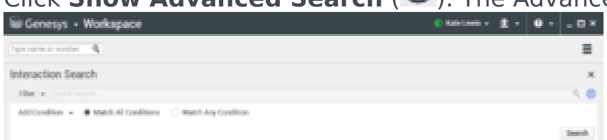
d. Click the magnifying glass to search for the criteria that you have entered, or click the **X** to clear the Quick Search field.

If multiple pages are returned in the search results, page through the list of search results by doing any of the following:

- Click the **Go to the Next Page** button () to view the next page
- Click the **Go to the Previous Page** button () to view the previous page
- Click the **Go to First Page** button () to return to the start of the list of search results
- Click the **Go to Last Page** button () to return to the start of the list of search results
- Specify the number of items that are displayed on each page by using the **per page** drop-down list

3. To perform an advanced search of the Interaction Database, perform the following steps:

a. Click **Show Advanced Search** (). The Advanced Search pane is displayed.



Interaction Search view Advanced Search pane

The Advanced Search feature enables you to use multiple criteria to refine your search. The Advanced Search pane contains drop-down lists of search criteria, such as Status, Subject, Start Date, and End Date.

Tip

The contents of the Advanced Search Pane are set up by your system administrator. There are many possibilities for how this view will appear to you and what criteria will be available. Your administrator might have created logical groups of criteria for you. In this case, the groups will be displayed in the **Add Condition** drop-down menu and in the main Advanced Search pane.

b. Workspace enables you to view contact interactions either by attributes or as threads. Click the `Show Interactions in Grid View/Show Interactions in Tree View` button (/) to specify how the Interaction History panel is displayed. Grid View displays interactions by attribute and Tree View displays interactions chronologically by thread. A thread is a group of two or more interactions with a single contact that were created in the same context (email replies, multichannel conversations, social-media threads, and so on). [**Added:** 8.5.116.10] The Grid view in newer environments displays a sortable list of all of the contacts in the contact database that match the search criteria.

c. If you know the type of interaction, such as email, chat, or SMS, for which you are searching, you can refine your search by using the Interaction Type filter. Select and deselect the types of interactions that are to be searched. The items that are displayed depend on the interaction types that you are configured to handle.

Click the **Filter** menu to select the interaction types that you want to search. You can select multiple items in the **Filter** menu. The following types are available, by default:

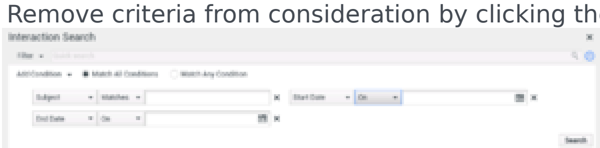
- Show all Interactions
- Show voice Interactions

- Show email Interactions
- Show chat Interactions
- Show SMS Interactions
- Show Other Media Interactions

When a filter is on, a check mark appears next to it in the **Filter** menu and the button remains highlighted if the "All" filter is not applied.

> ## Tip
> Your administrator might have configured additional customized options for the **Filter** menu, such as business area/department (for example: accounts, sales, and service) or customer level (for example: Silver, Gold, and Platinum). Custom filters enable you to refine your search. For example, if you are looking for email interactions about a service request, you can make two selections in the **Filter** menu to refine your search: **Show email Interactions** and **Show Interactions with Service Department**.

d. Use the **Add Condition** drop-down menu to add search criteria to the Advanced Search Pane. Remove criteria from consideration by clicking the **X** next to the option.



Interaction Search view Advanced Search pane showing three conditions

If your administrator has created groups for this view, you can add criteria by group to make it easier to manage the criteria. For example, your administrator might create the following groups and specified the following search criteria for each group:

- **Agent**: `Processed By`
- **Contact**: `Bcc Address`, `Cc Address`, `Contact`, `From Address`, `From Personal Part`, `Phone Number`, `Reply-To Address`, `Sent Date`, `To Address`
- **Dates**: `Chat Established Date`, `Chat Released Date`, `Sent Date`, `Start Date`, `End Date`
- **Interaction**: `Subject`, `Contact`, `Interaction Id`, `Processed By`, `Interaction Sub-Type`, `Interaction Type`
- **Other**: A group that is created automatically when your administrator creates one or more criteria groups. It contains all available search criteria that are not specified as members of other groups.

Next to the name of the group in the Advanced Search Pane is a **+**. Click the **+** to add more criteria from this group.

To add other search criteria or to display additional available groups, select them from the **Add Condition** menu. Remove criteria from consideration by clicking the **X** next to the option.

If you have date specific criteria available to you, you can use a calendar picker to specify a date. You can also type in a date manually. For example, to search based on the Start Date, use the calendar icon (17) to select a date, or enter the date in the format that conforms to your local day and time display preferences.

Menus for date fields might contain the following choices:

- **On**—The exact date
- **On or after**—The specified date or any date after
- **Before**—Before the specified date

- **Between**—Between the specified dates

Menus for pre-defined fields, such as Status, contain the pre-defined field names from the database—for example: **All**, **Done**, and **In Progress**.

Text field searches are based on a **Matches** search where the request returns interactions that contain the at least one word starting with the specified typed text.

Business Attribute searches use a drop-down menu that enables you to select the exact value to match.

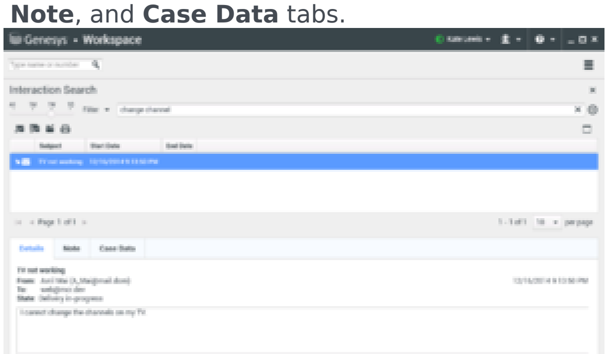
e. Use the **Match Conditions** options to specify whether **All** or **Any** of the search conditions that you have specified are applied.

f. Build up your search by adding criteria, then click **Search** to start your search based on the criteria that you have specified.

If multiple pages are returned in the search results, page through the list of search results by doing any of the following:

- Click the **Go to the Next Page** button (▶) to view the next page
- Click the **Go to the Previous Page** button (◀) to view the previous page
- Click the **Go to First Page** button (|◀) to return to the start of the list of search results
- Click the **Go to Last Page** button (▶|) to return to the start of the list of search results
- Specify the number of items that are displayed on each page by using the **per page** drop-down list

4. Select a search result item to view information about it in the Details Panel, which includes the **Details**, **Note**, and **Case Data** tabs.



Interaction Search view showing results and a selection in the **Details** tab

If the Details Panel is not displayed, you can display it by clicking the **Show Details Panel on Bottom**/**Hide Details Panel** toggle button:

The **Details** tab displays interaction specific information. For example, if you have selected an email interaction, the Subject, From, To, State, and body of the email interactions are displayed.

The **Note** tab enables you to view notes that are associated with the selected interaction.

The **Case Data** tab enables you to view the case information for the selected interaction.

5. Different actions are available for a selected interaction in the Search Results pane, depending on the type of interaction that you have selected. For example, you might be able to reply to the interaction, open the interaction, print the interaction, mark in-progress voice and email [**Added:** 8.5.110.13] interactions as Done, and delete In-Progress outbound email interactions [**Added:** 8.5.110.13]. Click an

action button to perform an action on the selected interaction.

END

Related Information

- Interaction Search
- My History
- Contact History
- Contact Directory
- Contact Search

Using Workbins

[**Modified:** 8.5.110.13]

In this lesson, you will learn how to access interactions that are stored in a workbin and belong to you, your place, your agent group, or your place group.

A workbin is like a personal queue, in which you can store email messages and other interactions that are to be handled later; however, unlike a queue, interactions that are stored in a workbin can be accessed in any order; they can be assigned to agents, places, agent groups, or place groups. Items that are stored in a workbin are owned by the owner of the workbin.

Open interactions can be saved to a workbin for future processing or collaborative processing by the agent, place, agent group, or place group. Interactions can also be distributed to workbins by Universal Routing Server.

This lesson contains the following section:

- Using Workbins to Access Stored Interactions

Using Workbins to Access Stored Interactions

Interactions can be routed to you, your place, your place group, or your agent group and stored in a workbin to be handled at any time.

Lesson: Accessing and handling interactions that are stored in a workbin

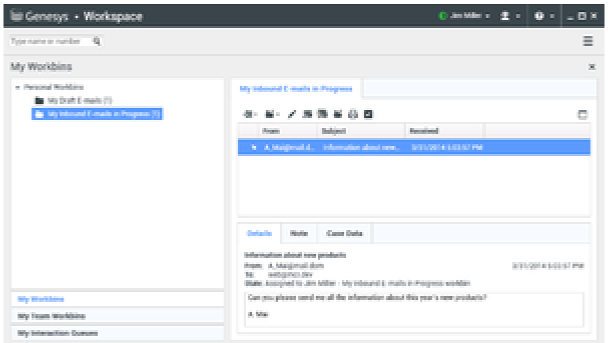
Purpose: To use a workbin to open an interaction.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You are the owner of the workbin in which the interaction is stored.

Start

1. In the Main Window, click the **Access and use Workspace supporting views** button (☰) to display the **Supporting Views** menu, then select **My Workbins**.

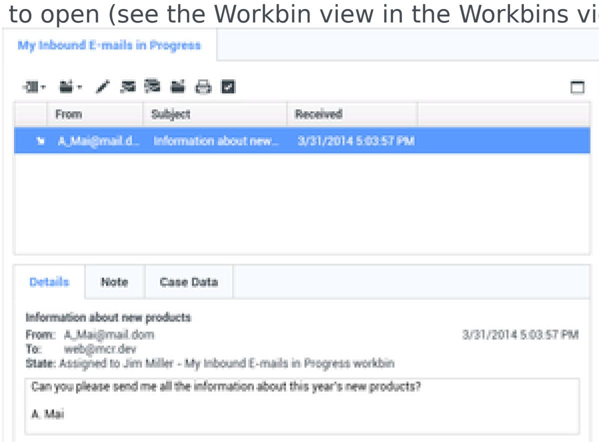


Workbins view in the Workspace Main Window

The Workbins view comprises three areas:

- Workbins Explorer—Enables you to select workbin folders from your personal workbins and your shared workbins. For agents who are configured as Team Leads (supervisors), you can change the explorer view to the following views:
    - **My Workbins**—For all agents, a view of your personal workbins or the shared workbins to which you have access.
    - **My Team Workbins**—For Team Leads, a view of all of the workbins that belong to agents that you supervise.
    - **My Interaction Queues**—For a business process supervisor, a filtered view of your queues and workbins.
- Workbin view—Lists all the interactions that are stored in the selected workbins, and includes information about the status of the interaction; enables you to sort, search, and perform actions on interactions
- Workbin interaction information—Enables you to view the `Details` tab, the `Notes` tab, and the `Case Data` tab for the selected interaction (see the Workbins view in the Workspace Main Window with a selected draft interaction figure)

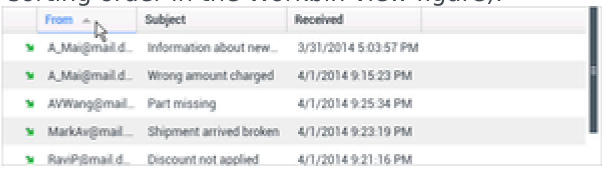
2. In the Workbins Explorer, select the workbin that contains the interaction that you want to open.
3. In the Workbin view, scroll through the list of interactions to find the specific interaction that you want to open (see the Workbin view in the Workbins view figure).



Workbin view in the Workbins view

4. To change the sorting order of the interactions, click the column headings in the table of interactions. Clicking the same column heading again reverses the sort order for that heading (see the Changed

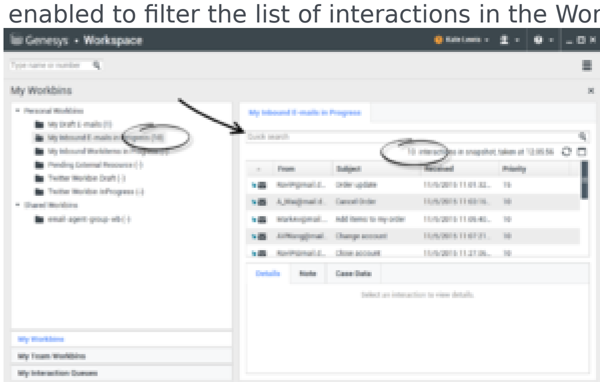
sorting order in the Workbin view figure).



	From	Subject	Received
	A_Mai@mail.d...	Information about new...	3/31/2014 5:03:57 PM
	A_Mai@mail.d...	Wrong amount charged	4/1/2014 9:15:23 PM
	AVWang@mail...	Part missing	4/1/2014 9:25:34 PM
	MarkAv@mail...	Shipment arrived broken	4/1/2014 9:23:19 PM
	RaviP@mail.d...	Discount not applied	4/1/2014 9:21:16 PM

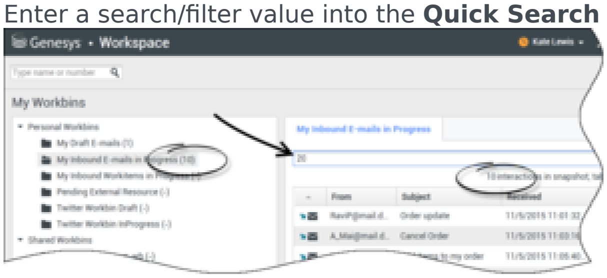
Changed sorting order in the Workbin view

5. To refresh the list of interactions in the workbin, click **Refresh** ( )—if the workbin is configured to be manually refreshed. [**Added:** 8.5.110.13]
6. If the Workbin search feature is enabled for you, you can limit the interactions that are displayed in the Workbin to those that coontain a value that you enter into the Quick Search field. Ask your supervisor what values you are allowed to use. [**Added:** 8.5.110.13]
   a. In this example, interactions are assigned a priority value in the Case Data. Agents have been enabled to filter the list of interactions in the Workbin by the priority value.



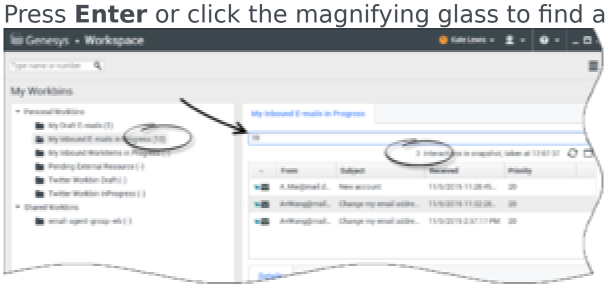
Use Quick Search to limit the list of interactions

   b. Enter a search/filter value into the **Quick Search** field. In this example, Priority 20 is entered.



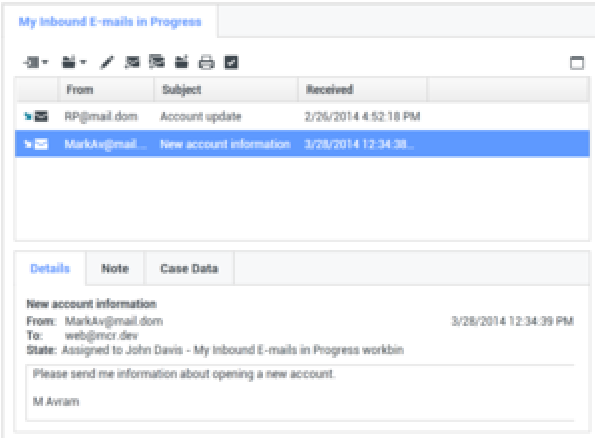
Enter a valid search value in the Quick Search field.

   c. Press **Enter** or click the magnifying glass to find all the interactions that contain the specified value.



The list of items in the Workbin are limited to those that contain the search value in Case Data.

7. Click the interaction that you want to handle when you find it in the Workbin view (see the Workbin view with a selected email interaction figure).



Workbin view with a selected email interaction

When you select an interaction, the following functionality becomes available for the interaction, depending on the interaction type:

- **Open**—Opens the interaction in an Interaction window (see Lesson: Handling an inbound email interaction)
- **Reply** (for email only)—Creates a reply and opens the interaction in an outbound Email Interaction window (see Lesson: Replying to a inbound email interaction)
- **Reply All** (for email only)—Creates a reply and opens the interaction in an outbound Email Interaction window and addresses the email to the sender and all other recipients of the original email (see Lesson: Replying to a inbound email interaction)
- **Mark Done**—Complete the interaction and close the interaction window; you might be configured to specify a disposition code before you can click `Mark Done` (see Lesson: Handling an inbound email interaction and Assigning Disposition Codes)
- **Move to Queue**—(if you have the correct permissions) Opens the Team Communicator to enable you to select a queue to which you want to move the selected interaction(s). Enter the name of the queue into the Team Communicator search field, then from the Queue item Action menu, select Move to Queue.
- **Move to Workbin**—(if you have the correct permissions) Opens the Team Communicator to enable you to find an agent or agent group to which you want to move the selected interaction(s).
- **Edit Case Information**—(if you have the correct permissions) Opens the Edit Case Information window to enable you to edit the content of the Case Data tab for the selected interaction(s).
- **Print** (for email only)—(if you have the correct permissions) Opens the Print Preview window to enable you to print the selected interaction. [**Added:** 8.5.101.14]

End

Lesson: Storing an interaction in your Draft workbin

Purpose: To use your Drafts workbin to store an outbound email interaction to be completed at a later time by you or another agent.

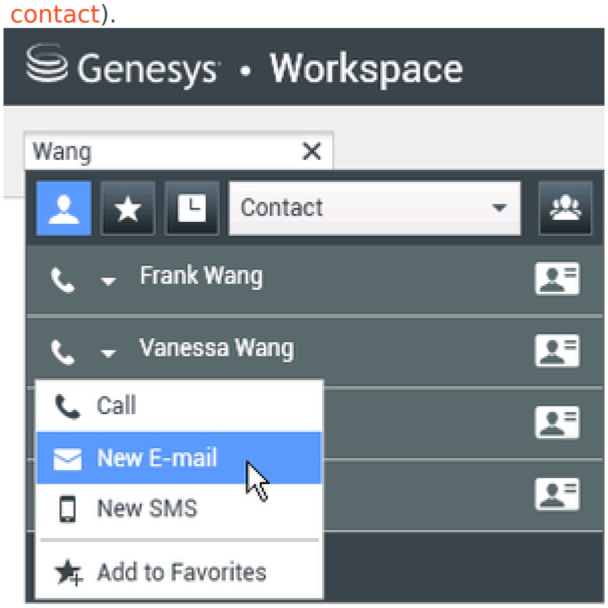
Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).

- You have accepted an inbound or transferred email interaction (see Receiving and Handling an Inbound Email Interaction) or you want to create a new outbound email interaction (see Creating and Handling a New or Reply Email Interaction).

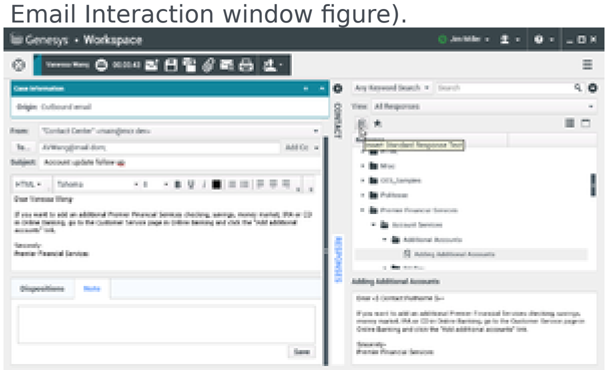
Start

1. You can save a new outbound email message or a reply outbound email message (see Lesson: Replying to a inbound email interaction) to your Draft workbin. To create new outbound email, use the Team Communicator to find the contact, and select `New Email` (see the New Email option in the Team Communicator Action menu figure and Lesson: Using the Team Communicator feature to find a contact).



Procedure: Using the Team Communicator feature to find a contact

2. Compose your new or reply email interaction in the Email Interaction window (see the New outbound Email Interaction window figure).



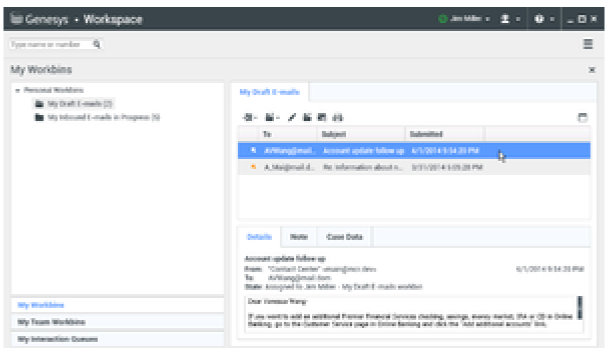
New outbound Email Interaction window

3. To save the outbound email interaction in your Draft workbin folder, click `Save in Draft Workbin` (). The interaction window closes, and the interaction is stored in your Draft workbin.

4. If you want to open the interaction later to continue to work on it, click the `Workbins` button on the Workspace Main Window (see the Workbins view in the Workspace Main Window with a selected draft interaction figure). The Workbins Explorer displays the number of interactions in each workbin, and your saved interaction is displayed in the Draft workbin. The Draft Workbin enables you to use the

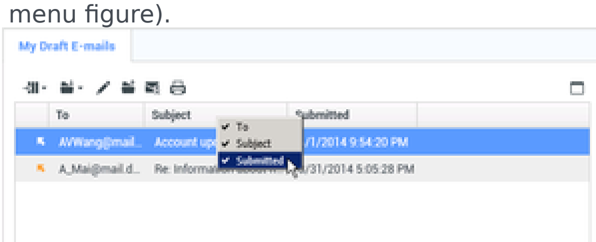
following functionality:

- Find an interaction by scrolling through the list of interactions.
- Change the sort order of interactions by clicking the interaction list column heads.
- `Open`—Open the interaction in an inbound Email Interaction window (see Lesson: Handling an inbound email interaction).
- `Delete`—Delete the interaction permanently from the Interaction Server database (if you have the correct permissions).
- `Details`—View the sender and recipient information, subject, and contents of the selected interaction.
- `Note`—View the note attached to the interaction. See Managing Contact History
- `Case Data`—View Case Information and Disposition Code for the current interaction



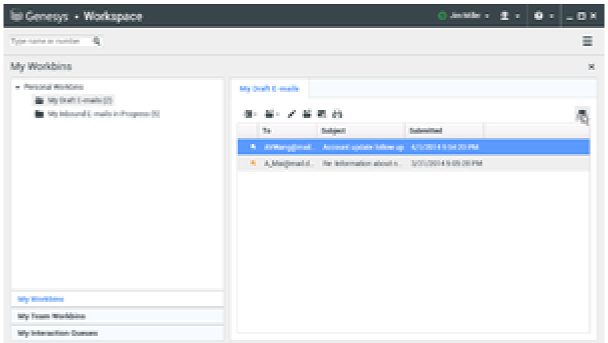
Workbins view in the Workspace Main Window with a selected draft interaction

5. If you want to hide or show column headings in the interaction list, right-click in the list and select the headings that you want to hide or show respectively (see the Interaction list column-heading contextual menu figure).



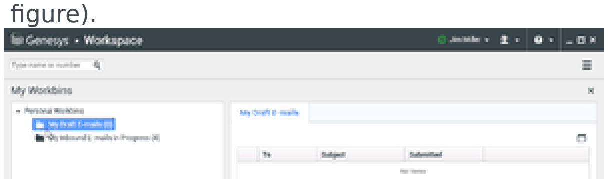
Interaction list column-heading contextual menu

6. To show or hide the interaction information area, click the `Show/Hide Details Panel` button. The Draft workbin with the interaction information area hidden figure shows the Draft workbin in which the interaction-information area is hidden.



Draft workbin with the interaction information area hidden

7. When you have finished handling all the interactions in the `Draft` workbin, the `Draft` folder in the Workbins Explorer shows `0` entries and the Draft workbin shows *No items* (see the Empty Draft workbin figure).



Empty Draft workbin

End

Related Information

- Workbins
- Team Lead

Team Lead Functionality

In this lesson, you will learn how a Team Lead (Supervisor) can monitor, coach, and barge-in on agents who are handling voice and chat interactions.

This topic contains the following sub-topics:

- Monitor, Coach, and Barge-in Interactions
- Workbin and Queue Management
- Change agent state and log off agents

Related Information

- Team Lead

Monitor Coach And Barge-in Interactions

> **Important**
> This tutorial describes the most common monitoring configuration. Your administrator might have set up monitoring differently in your environment. If you are unsure about whether you can monitor the currently active interaction or the next interaction of an agent you are monitoring, ask your administrator.

In this lesson, you will learn how a Team Supervisor can monitor, coach, and barge-in on agents who are handling voice and chat interactions:

- Monitoring an agent enables you to hear the interaction between an agent and a contact without either party being able to hear you; or read the chat transcript between an agent and a contact without either party knowing that you are reading the transcript. Agents might be configured to know when they are being monitored (an icon is displayed in the interaction window), or they might be configured to be monitored without their knowledge (silent monitoring).
- You can barge-in to an active voice interaction that you are monitoring between an agent and a contact so that both parties can hear you. You can also barge-in to a chat session that you are monitoring.
- Coaching an agent enables you to hear the interaction between an agent and a contact without the contact being able to hear you coach the agent; or read the transcript of the interaction between an agent and a contact and send chat messages to the agent without the contact being aware that you are reading the transcript and communicating with the agent.
- You can barge-in to an active voice interaction that you are coaching between an agent and a contact so that both parties can hear you. You can also barge-in to a chat session that you are coaching.

This lesson contains the following sections:

- Monitoring a Voice Interaction
- Coaching a Voice Interaction
- Monitoring a Chat Interaction
- Coaching a Chat Interaction
- Switching Team Supervisor Modes

> **Important**
> To use the Team Supervisor functionality, you must be configured as a Supervisor for an agent group. A Team Supervisor can monitor or coach as many chat agents as he or she want to, but he or she can monitor or coach only one voice agent at a time.

Monitoring a Voice Interaction

Monitoring an agent who is handling an interaction means that you can listen to a voice interaction between an agent and a contact without the agent or contact being aware that you are listening. Agents can be configured to be notified when they are being monitored. You can monitor the current or next interaction of an agent.

Tip

- You can monitor only one voice agent at a time.
- You can monitor only one interaction from the same agent at the same time.
- You can monitor the next interaction of only one agent at the same time.
- Multiple supervisors cannot monitor the next interactions of the same agent.

Lesson: Monitoring an agent who is handling a voice interaction

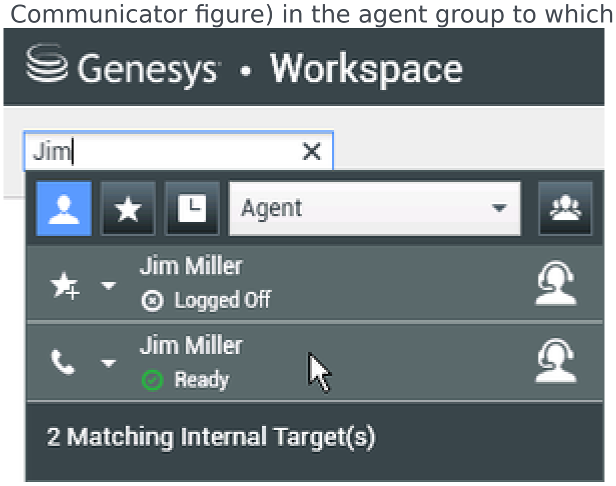
Purpose: To listen to an agent and a contact in a voice interaction without the agent or contact being able to hear you.

Prerequisites

- You are configured as a Supervisor for an agent group.
- You are logged in to a Voice channel in Workspace (see Lesson: Logging in to Workspace).

Start

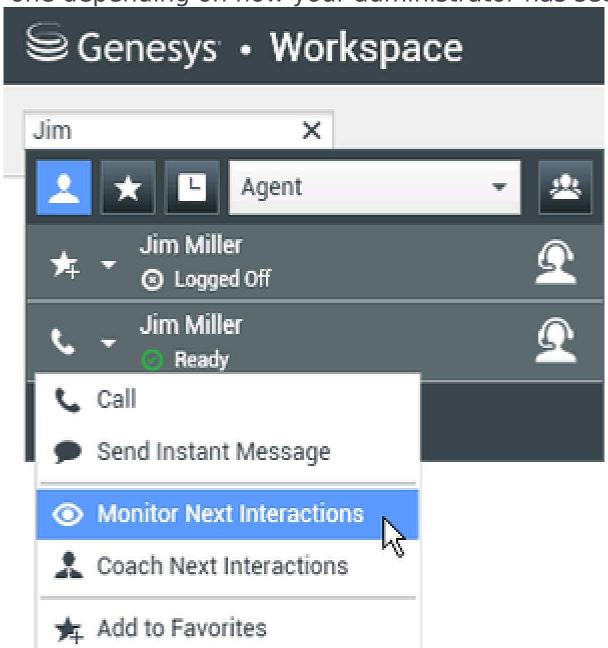
1. Use the Team Communicator in the Main Window to find an agent (see the Main Window Team Communicator figure) in the agent group to which you have been assigned as a Supervisor.



Main Window Team Communicator

2. Open the `Action Menu` for the agent whom you want to monitor and select `Monitor Next`

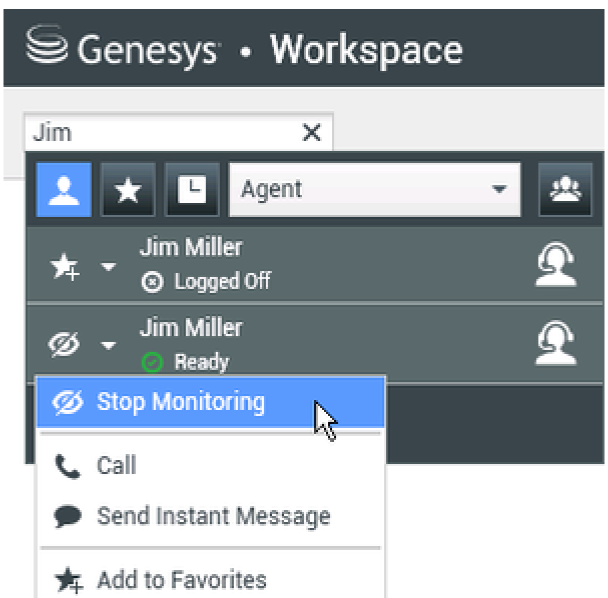
Interactions (see the Internal Target Action Menu figure). If there is a currently active interaction, it is displayed in the Monitor menu; to monitor the current interaction, select it from the Monitor menu. To monitor continuously the interactions handled by an agent (starting from the current one or the next one depending on how your administrator has set up your environment), select Next Interactions.



Internal Target Action Menu

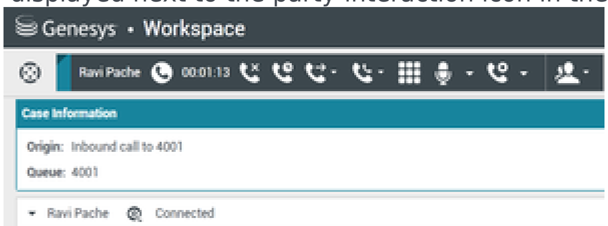
A system message is displayed that informs you that monitoring of interactions on your configured channels has started for the selected agent.

In the Team Communicator, the Action Menu for the agent whom you are monitoring changes to the Stop Monitoring button.

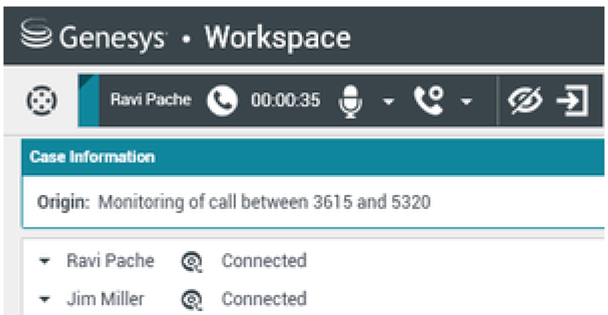


3. When the monitored agent accepts a voice interaction, a notification is displayed on your desktop. Click Accept to begin monitoring the interaction. The Voice Interaction Monitoring window is displayed on your desktop and you are connected to the call. Neither the contact nor the agent can hear you, but

you can hear both parties. If you do not click Accept, the notification will be dismissed automatically, and you will not be able to monitor the interaction unless you stop monitoring and start monitoring the same agent. If the agent is already handling an interaction when you start monitoring, a notification is displayed immediately. If you click Accept, you will begin monitoring the call that is already in progress. If the monitored agent is configured to be notified when he or she is being monitored, an eye icon is displayed next to the party-interaction icon in the Voice Interaction window on the agent's desktop.



The same icon is displayed in the Voice Interaction Monitoring window on your desktop next to the party Action menu.



4. During a monitoring session, you can perform the following actions from the Voice Interaction Monitoring window:

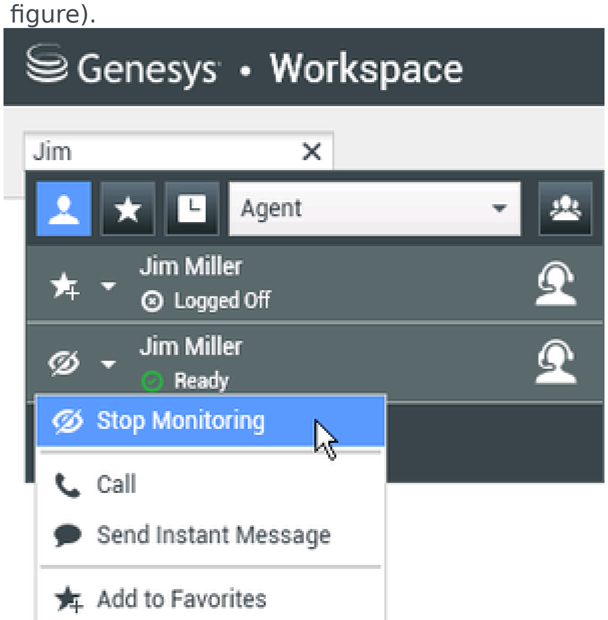
   - End Monitoring—Click End Monitoring () in the Supervisor controls of the Call Actions toolbar to end the monitoring session.
   - Barge-in—Click Barge-in () in the Supervisor controls of the Call Actions toolbar to join the monitored call. Both parties will be able to hear you. You can switch back to monitoring by clicking End the Call () in the Call Actions toolbar.
   - Coach via Instant Messaging—Select Coach via Instant Messaging from the agent party Action menu. An Instant Messaging session is added to the Voice Interaction window. You can coach the agent whom you are monitoring by sending instant messages to them (see Handle Internal Instant Messaging).
   - Coach via voice—Select Coach via voice from the agent party Action menu, or use Unmute (Coach) () in the Interaction toolbar to return to coaching.

     For more information, see Lesson: Coaching an agent who is handling a voice interaction.

   If you stopped monitoring, you are disconnected from the call. The monitoring-indicator icon is removed from the Voice Interaction window of the agent.
   If the agent ends the call while you are still monitoring the agent, your monitoring session ends automatically.

5. Click Done to close the Voice Interaction Monitoring window and mark the interaction as Done.
6. To stop monitoring the agent, use the Team Communicator to find the agent whom you are monitoring.

7. Open the `Action Menu` for the agent ,and select `Stop Monitoring` (see the Internal Target Action Menu figure).



Internal Target Action Menu

A system message is displayed that informs you that monitoring of interactions on your configured channels has ended for the selected agent.

End

Coaching a Voice Interaction

Coaching an agent who is handling an interaction means that you can listen to a voice interaction between an agent and a contact and speak to that agent without the contact being aware that you are listening and speaking to the agent. You can coach the current or next interaction of an agent.

Lesson: Coaching an agent who is handling a voice interaction

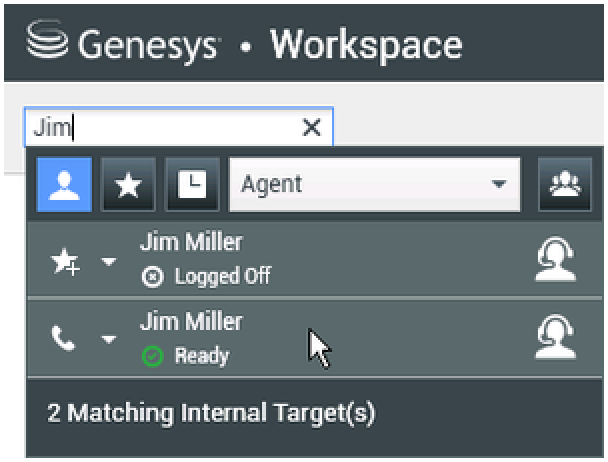
Purpose: To listen and speak to an agent who is handling a voice interaction without the contact being able to hear you.

Prerequisites

- You are configured as a Supervisor for an agent group.
- You are logged in to a Voice channel in Workspace (see Lesson: Logging in to Workspace).

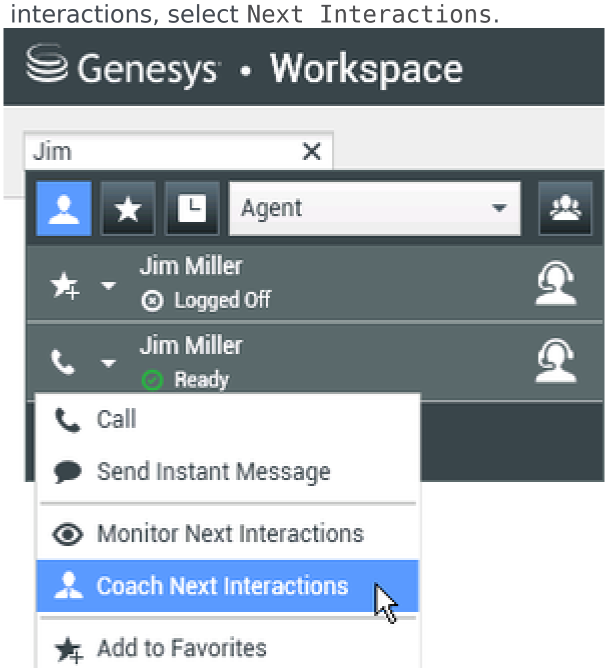
Start

1. Use the Team Communicator in the Main Window to find an agent (see the Main Window Team Communicator figure) in the agent group to which you have been assigned as a Supervisor.



Main Window Team Communicator

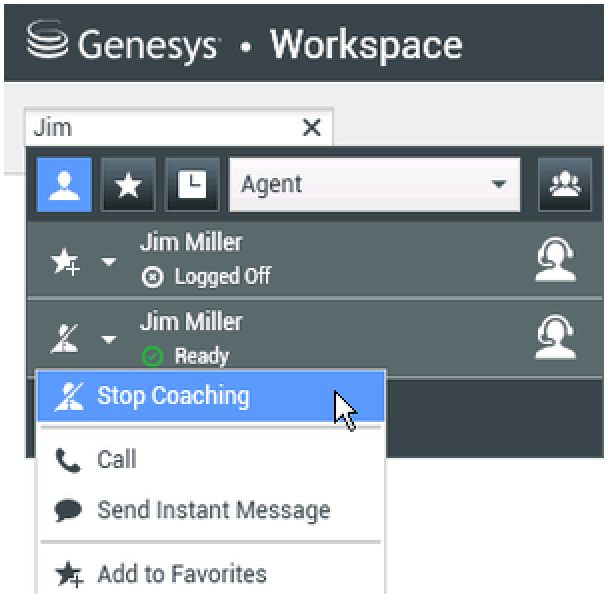
2. Open the `Action Menu` for the agent whom you want to coach and select `Coach Next Interactions` (see the Internal Target Action Menu figure). If there is a currently active interaction, it is displayed in the `Coach` menu; to coach the current interaction, select it from the `Coach` menu. To coach the next interactions, select `Next Interactions`.



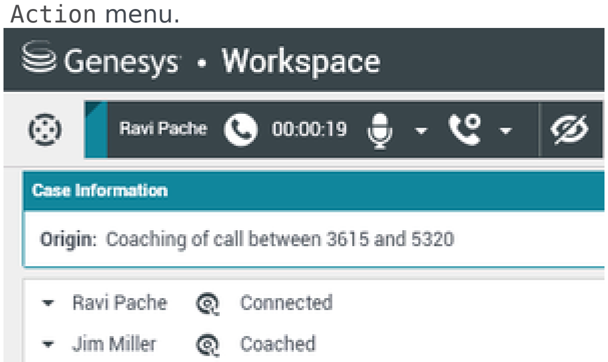
Internal Target Action Menu

A system message is displayed that informs you that coaching of interactions on your configured channels has started for the selected agent.

In the Team Communicator, the `Action Menu` for the agent whom you are coaching changes to the `Stop Coaching` button.

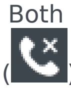


3. When the coached agent accepts a voice interaction, a notification is displayed on your desktop. Click `Accept` to begin coaching the interaction. The Voice Interaction Monitoring window is displayed on your desktop and you are connected to the call. You can hear the agent and the agent can hear you, but the contact can hear only the agent. If you do not click `Accept`, the notification will be dismissed automatically, and you will not be able to coach the interaction unless you stop coaching and start coaching the same agent. If the agent is already handling an interaction when you start coaching, a notification is displayed immediately. If you click `Accept`, you will begin coaching the call that is already in progress.
The eye icon is displayed in the Voice Interaction Coaching window on your desktop next to the party `Action` menu.



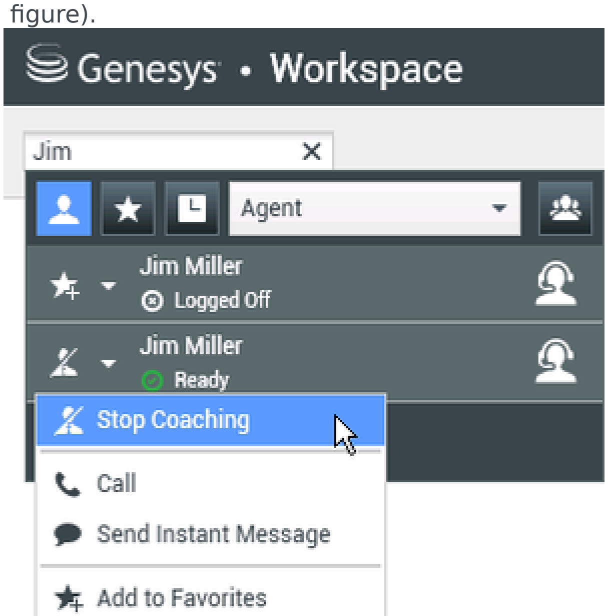
4. During a coaching session, you can perform the following actions from the Voice Interaction Coaching window:

   - End Monitoring—Click `End Monitoring` () in the Supervisor controls of the `Call Actions` toolbar to end the coaching session.

   - Barge-in—Click `Barge-in` () in the Supervisor controls of the `Call Actions` toolbar to join the monitored call. Both parties will be able to hear you. You can switch back to monitoring by clicking `End the Call` () in the `Call Actions` toolbar.

- Mute (Monitor)—You can switch to monitoring the call by clicking `Mute (Monitor)` () in the `Call Actions` toolbar.
- Coach via Instant Messaging—Select `Coach via Instant Messaging` from the agent party `Action` menu. An Instant Messaging session is added to the Voice Interaction window. You can coach the agent that you are coaching by voice by sending instant messages to that agent (see Handle Internal Instant Messaging).
  If you stopped coaching, you are disconnected from the call.
  If the agent ends the call while you are still coaching the agent, your coaching session ends automatically.

5. Click `Done` to close the Voice Interaction Coaching window and mark the interaction as `Done`.
6. To stop coaching the agent, use the Team Communicator to find the agent whom you are coaching.
7. Open the `Action Menu` for the agent and select `Stop Coaching` (see the Internal Target Action Menu figure).



Internal Target Action Menu

A system message is displayed that informs you that coaching of interactions on your configured channels has ended for the selected agent.

End

Monitoring a Chat Interaction

Monitoring an agent who is handling an interaction means that you can read a chat interaction between an agent and a contact without the agent or contact being aware that you are reading the interaction. Agents can be configured to be notified when they are being monitored. You can monitor the current or next interaction of an agent.

Tip

- You can monitor multiple chat agents at the same time.
- You can monitor multiple interactions from the same agent at the same time.
- You can monitor the next interaction of several agents at the same time.
- Multiple supervisors can monitor the next interactions of the same agent.
- Workspace does not limit the number of concurrent chat iterations that a supervisor may monitor. The maximum number should be determined by the policies of your company.

Lesson: Monitoring an agent who is handling a chat interaction

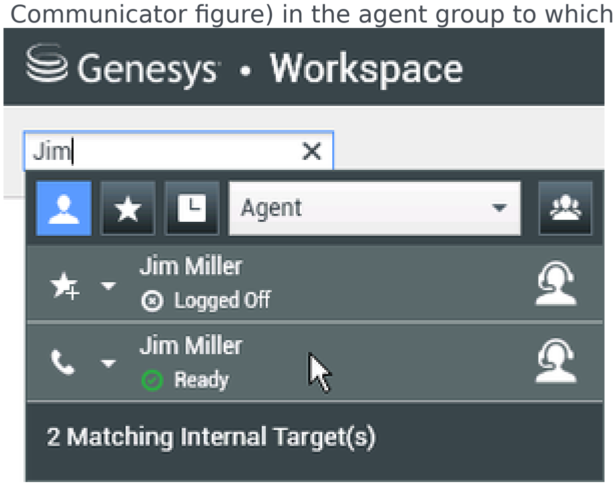
Purpose: To read the live transcript between an agent and a contact in a chat interaction without the agent or contact being aware of you.

Prerequisites

- You are configured as a Supervisor for an agent group.
- You are logged in to a Chat channel in Workspace (see Lesson: Logging in to Workspace).

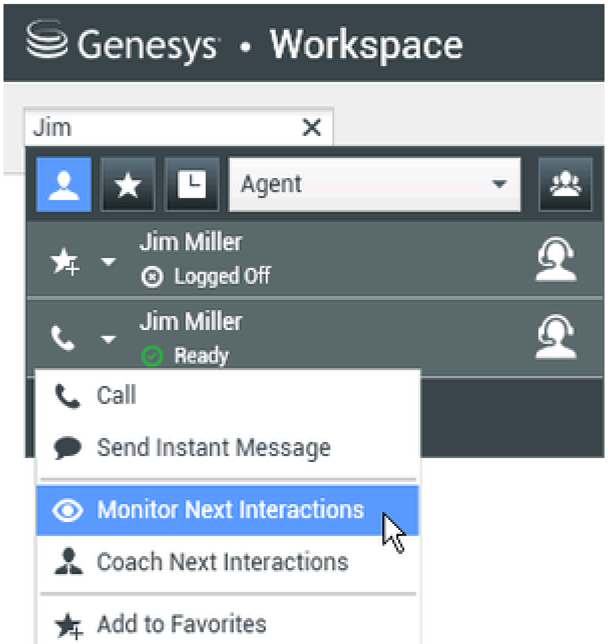
Start

1. Use the Team Communicator in the Main Window to find an agent (see the Main Window Team Communicator figure) in the agent group to which you have been assigned as a Supervisor.



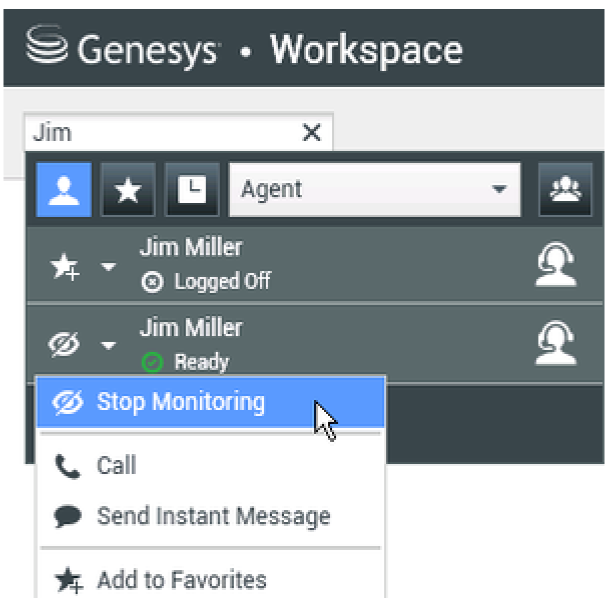
Main Window Team Communicator

2. Open the `Action Menu` for the agent whom you want to monitor and select `Monitor Next Interactions` (see the Internal Target Action Menu figure). If there is a currently active interaction, it is displayed in the `Monitor` menu; to monitor the current interaction, select it from the `Monitor` menu. To monitor continuously the interactions handled by an agent (starting from the current one or the next one depending on how your administrator has set up your environment), select `Next Interactions`.



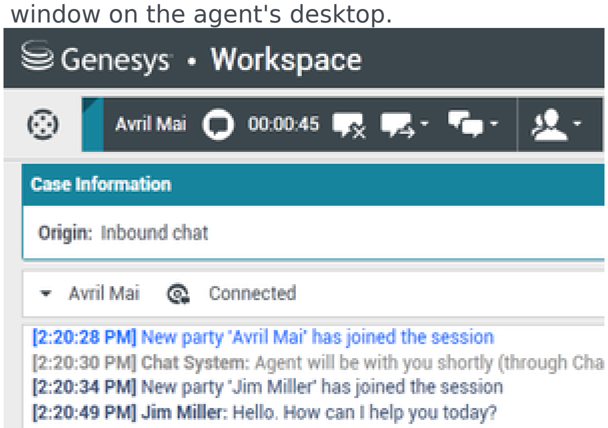
Internal Target Action Menu

A system message is displayed that informs you that monitoring of interactions on your configured channels has started for the selected agent. In the Team Communicator, the `Action Menu` for the agent whom you are monitoring changes to the `Stop Monitoring` button.

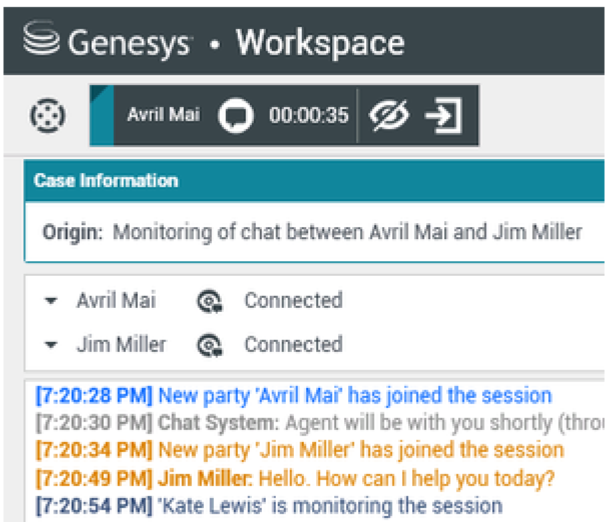


3. When the monitored agent accepts a chat interaction, a notification is displayed on your desktop. Click `Accept` to begin monitoring the interaction. The Chat Interaction Monitoring window is displayed on your desktop and you are connected to the chat session. You can read the chat transcript, but you cannot send any text to the contact or the agent. If you do not click `Accept`, the notification will be dismissed automatically, and you will not be able to monitor the interaction unless you stop monitoring and start monitoring the same agent. If the agent is already handling an interaction when you start monitoring, a notification is displayed immediately. If you click `Accept`, you will begin monitoring the chat that is already in progress. If the monitored agent is configured to be notified when he or she is

being monitored, an eye icon is displayed next to the party-interaction icon in the Chat Interaction window on the agent's desktop.



The same icon is displayed in the Chat Interaction Monitoring window on your desktop next to the party `Action` menu.



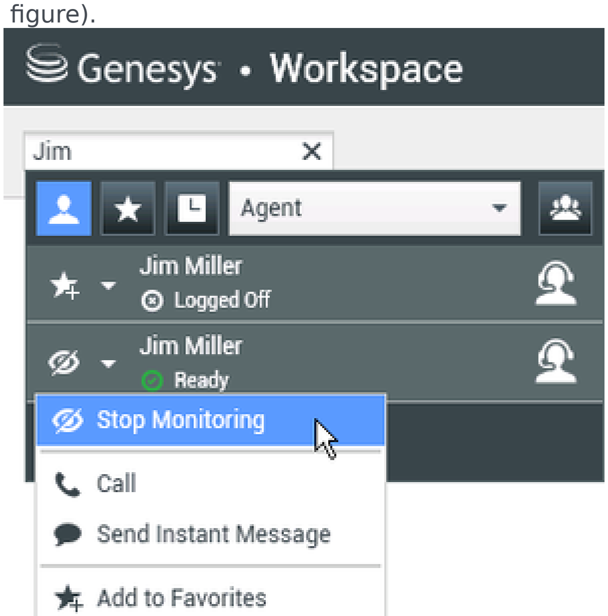
4. During a monitoring session, you can perform the following actions from the Chat Interaction Monitoring window:

   - End Monitoring—Click `End Monitoring` () in the Supervisor controls of the `Call Actions` toolbar to end the monitoring session.
   - Barge-in—Click `Barge-in` () in the Supervisor controls of the `Call Actions` toolbar to join the monitored chat session. Both parties will be able to see your messages. You can switch back to monitoring by clicking `End Chat` () in the `Call Actions` toolbar.
   - Coach via Instant Messaging—Select `Coach via Instant Messaging` from the agent party `Action` menu. An Instant Messaging session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by sending instant messages to the agent (see Handle Internal Instant Messaging).
   - Coach via voice—Select `Coach via Voice` from the agent party `Action` menu. An voice session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by

speaking directly to the agent (see Making a Voice Call).

- Coach via chat—Select `Coach via Chat` from the agent party `Action` menu. A chat session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by sending chat messages to the agent (see Starting or Receiving a Chat Consultation).
  If you stopped monitoring, you are disconnected from the chat session. The monitoring indicator icon is removed from the Chat Interaction window of the agent.
  If the agent ends the chat session while you are still monitoring the agent, your monitoring session ends automatically.

5. Click `Done` to close the Chat Interaction Monitoring window and mark the interaction as `Done`.
6. To stop monitoring the agent, use the Team Communicator to find the agent whom you are monitoring.
7. Open the `Action Menu` for the agent and select `Stop Monitoring` (see the Internal Target Action Menu figure).



Internal Target Action Menu

A system message is displayed that informs you that monitoring of interactions on your configured channels has ended for the selected agent.

End

Coaching a Chat Interaction

Coaching an agent who is handling an interaction means that you can read the transcript of the interaction between an agent and a contact and send chat messages to the agent without the contact being aware that you are reading the transcript and communicating with the agent. You can coach the current or next interaction of an agent.

Lesson: Coaching an agent who is handling a chat interaction

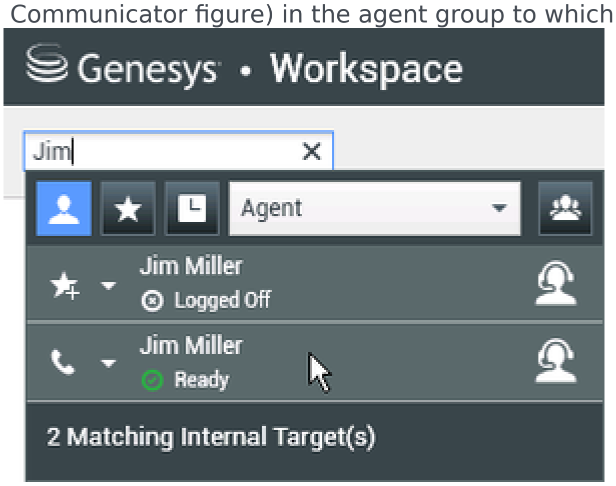
Purpose: To read the chat transcript and send messages to an agent who is handling a chat interaction without the contact knowing that you are reading the transcript and communicating with the agent.

Prerequisites

- You are configured as a Supervisor for an agent group.
- You are logged in to a Chat channel in Workspace (see Lesson: Logging in to Workspace).

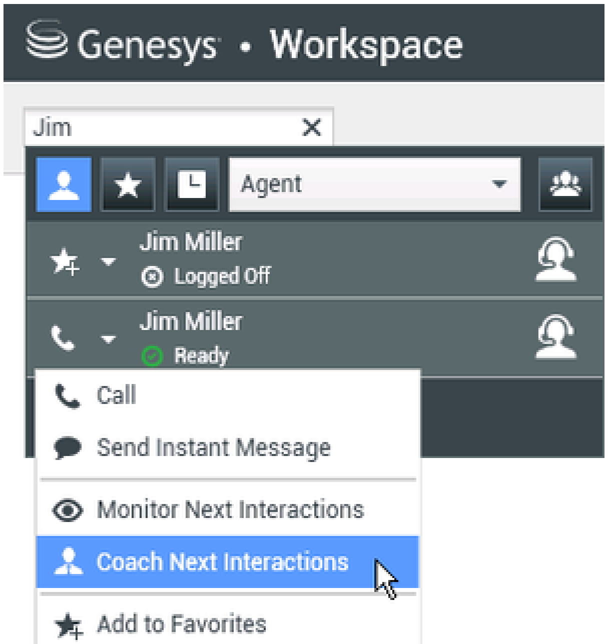
Start

1. Use the Team Communicator in the Main Window to find an agent (see the Main Window Team Communicator figure) in the agent group to which you have been assigned as a Supervisor.



Main Window Team Communicator

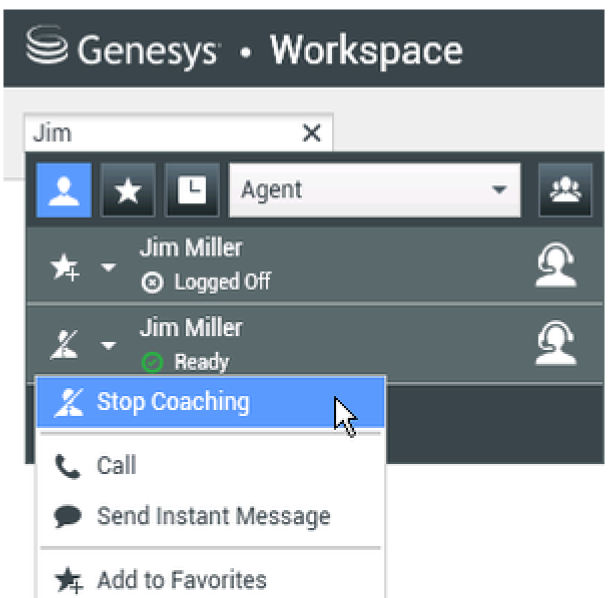
2. Open the `Action Menu` for the agent whom you want to coach and select `Coach next interactions` (see the Internal Target Action Menu figure). If there is a currently active interaction, it is displayed in the `Coach` menu; to coach the current interaction, select it from the `Coach` menu. To coach the next interaction, select `Next Interactions`.



Internal Target Action Menu

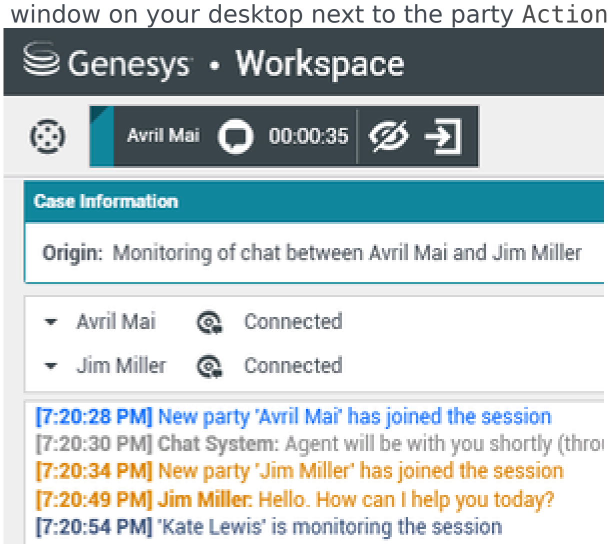
A system message is displayed that informs you that coaching of interactions on your configured channels has started for the selected agent.

In the Team Communicator, the `Action Menu` for the agent whom you are coaching changes to the `Stop Coaching` button.



3. When the coached agent accepts a chat interaction, a notification is displayed on your desktop. Click `Accept` to begin coaching the interaction. The Chat Interaction Monitoring window is displayed on your desktop and you are connected to the chat session. You can read the chat transcript and send private chat messages to the agent without the contact seeing your messages. If you do not click `Accept`, the notification will be dismissed automatically, and you will not be able to coach the interaction unless you stop coaching and start coaching the same agent. If the agent is already handling an interaction when you start coaching, a notification is displayed immediately. If you click `Accept`, you will begin coaching

the chat session that is already in progress. The eye icon is displayed in the Chat Interaction Coaching window on your desktop next to the party Action menu.



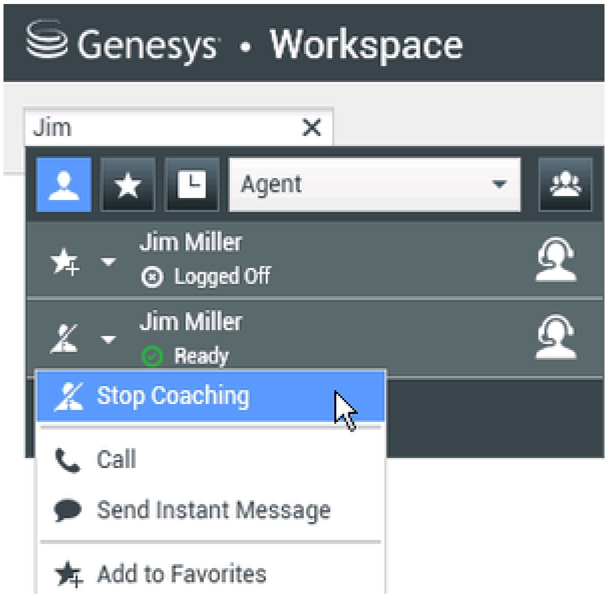
4. During a coaching session, you can perform the following actions from the Chat Interaction Coaching window:

   - End Monitoring—Click `End Monitoring` ( ) in the Supervisor controls of the `Call Actions` toolbar to end the coaching session.
   - Barge-in—Click `Barge-in` ( ) in the Supervisor controls of the `Call Actions` toolbar to join the monitored chat session. Both parties will be able to see your messages. Your coaching session ends when you barge-in to the chat.

   Click `Done` to close the coaching session in the window and mark the coaching interaction as `Done`. You can switch to monitoring the chat session (see Monitoring a Chat Interaction) by clicking `End Chat` ( ) in the `Call Actions` toolbar.

   - Coach via voice—Select `Coach via Voice` from the agent party `Action` menu. An voice session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by speaking directly to the agent (see Making a Voice Call).
   - Coach via Instant Messaging—Select `Coach via Instant Messaging` from the agent party `Action` menu. An Instant Messaging session is added to the Chat Interaction window. You can coach the agent whom you are coaching by chat by sending instant messages to that agent (see Handle Internal Instant Messaging).
     If you stopped coaching, you are disconnected from the chat session.
     If the agent ends the chat session while you are still coaching the agent, your coaching session ends automatically.

5. Click `Done` to close the Chat Interaction Coaching window and mark the interaction as `Done`.
6. To end coaching the agent, use the Team Communicator to find the agent whom you are coaching.
7. Open the `Action Menu` for the agent and select `Stop Coaching` (see the Internal Target Action Menu figure).



Internal Target Action Menu

A system message is displayed that informs you that coaching of interactions on your configured channels has ended for the selected agent.

End

Switching Team Supervisor Modes

Workspace enables you to switch from certain team-supervision modes to others. During the monitoring or coaching of an active interaction, you can switch from one supervision mode to another. The following transitions are supported:

- Monitoring to coaching—Use the party `Action` menu that is associated with the agent, or `Use Unmute (Coach)` in the Interaction toolbar to return to coaching.
- Monitoring to barge-in—Click `Barge-in` in the `Supervision` bar.
- Coaching to barge-in—Click `Barge-in` in the `Supervision` bar.
- Coaching to monitoring—Click `End Chat`, `End Call`, or `End IM` in the Interaction toolbar of the coaching interaction to return to monitoring, or `Mute (Monitor)` in the Interaction toolbar to return to monitoring.
- Barge-in to monitoring—Click `End Call` or `End Chat` in the Interaction toolbar to return to monitoring.
- Barge-in to coaching—Use the party `Action` menu that is associated with the agent.

Tip

All switching modes are available for the Chat channel; however, depending on the technical environment of your voice channel, the following voice specific supervisor switch-modes might not be available:

- Switching from coaching to barge-in
- Switching from monitoring to barge-in
- Switching from monitoring to coaching
- Switching from coaching to monitoring
- Switching from barge-in to coaching

If you are an administrator and require technical details about these limitations, see Monitoring SIP, Cisco UCM, or Skype for Business voice interactions in the *Workspace Desktop Edition Deployment Guide*.

Related Information

- Team Lead

If you want to monitor the status of your agents you can use Genesys Pulse:

- Dashboards and Wallboards in the *Genesys Pulse Help*

Workbin and Queue Management

In this lesson, you will learn how a Team Lead (supervisor) can view and manage the contents of the workbins of the agents or agent groups that he or she supervises. You will also learn how to view and manage the contents of queues by viewing "snapshots" of the interactions in the interaction database.

This lesson contains the following sections:

- Using the My Team Workbins Explorer
- My Interaction Queues Management

My Team Workbin Management

Interactions can be routed to the agents that you lead and can be stored in their workbins to be handled at any time. Also, your agents might choose to store draft and in-progress interactions in their workbins. Sometimes it might be necessary to move the interactions from an agent's personal workbin to the workbin of another agent, to your own workbin, or to a queue. Use the following procedure to move an interaction from the workbin of one agent to the workbin of another agent.

Lesson: Using the My Team Workbins Explorer

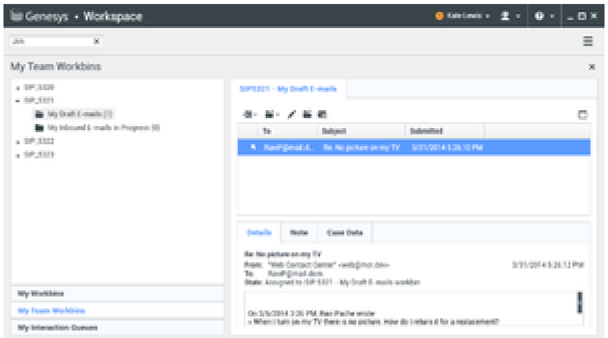
Purpose: To view and manage the contents of the workbins of agents that you lead.

Prerequisites

- Your account is configured as a Team Lead/supervisor of a group of agents.
- Your account is configured to manage the workbins of the agents that you lead.
- Your account is configured to move interactions to a queue.

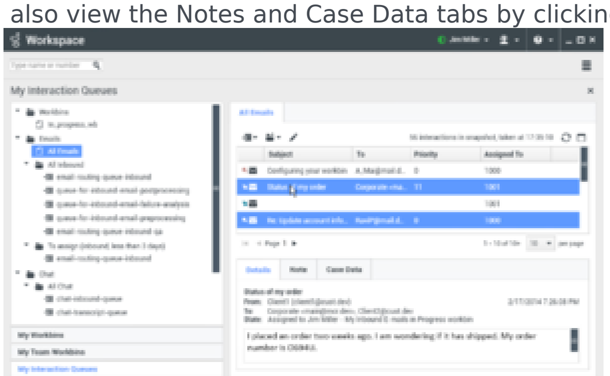
Start

1. In the Main Window, click the **Access and use Workspace supporting views** button (☰) to display the **Supporting Views** menu, then select **My Team Workbins**. The My Team Workbins view contains a list of all of the agents that you lead.
2. In the Workbins Explorer view, click the name of the agent whose workbins you want to view and manage. The list of workbins is displayed under the agent name.
3. Click a workbin to display its contents in the Workbin view to the right.



Workbins view in the My Team Workbins view of the Workspace Main Window

4. Click an interaction to select it. The contents of the interaction are displayed in the Details tab. You can also view the Notes and Case Data tabs by clicking them.



Selecting multiple interactions.

To select more than one interaction, use **Shift-click** to select a range or **Ctrl-click** to select multiple items.

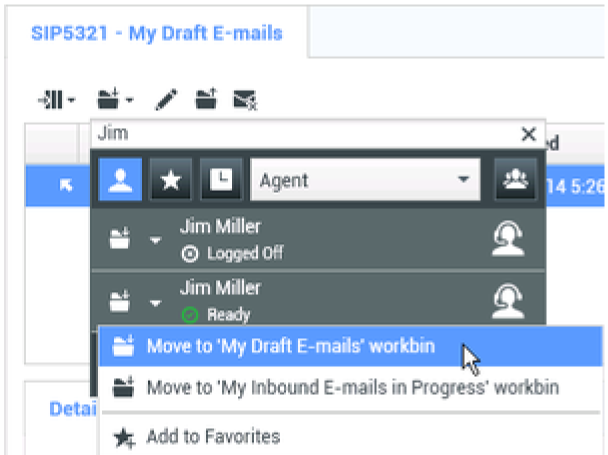
5. Depending on the permissions that are granted to you, you can choose to move the selected interaction to the workbin of a target agent or to a queue:

   - To move the selected interaction to a workbin, click `Move to Workbin` (). The Team Communicator is displayed.

     a. In the Team Communicator search field, enter the name of the target agent or agent group.

     b. From the list of targets that is displayed, click the Move to Workbin action menu that is beside the name of the target in the list to view the list of workbins that belong to the target.

     c. From the list of workbins, click the name of the target workbin.



Selecting a target workbin from the Team Communicator

d. In the confirmation dialog box, click Yes to move the interaction to the target workbin or click No to cancel the action.

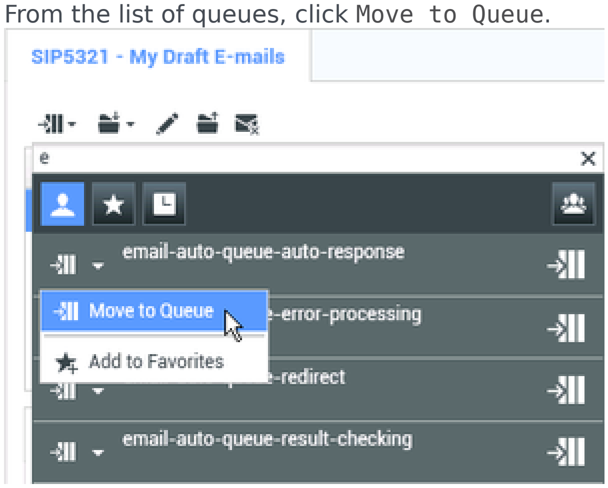
e. If you clicked Yes, the interaction is moved to the target workbin.

- To move the selected interaction to a queue, click `Move to Queue` ( ). The Team Communicator is displayed.

a. In the Team Communicator search field, enter the name of the target queue.

b. From the list of targets that is displayed, click the Move to Queue action menu that is beside the name of the target in the list.

c. From the list of queues, click `Move to Queue`.



Selecting a target queue from the Team Communicator

d. In the confirmation dialog box, click Yes to move the interaction to the target queue or click No to cancel the action.

e. If you clicked Yes, the interaction is moved to the target queue.

End

My Interaction Queues Management

Interactions are routed to queues for processing. Sometimes interactions might remain in a queue for a longer period of time than your business requirements want. The My Interaction Queues view enables you to view the contents of your Interaction Database by criteria that are specified by your administrator.

Sometimes it might be necessary to move the interactions from a queue to the workbin of another agent, to your own workbin, or to a different queue. Use the following procedure to move an interaction from a queue to a workbin or another queue.

Lesson: Using the My Interaction Queues Explorer

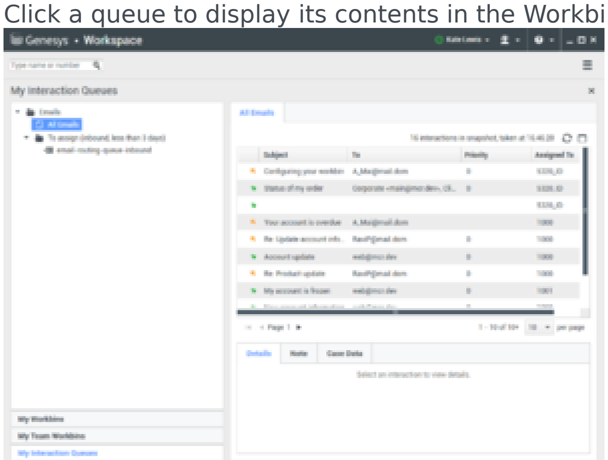
Purpose: To view and manage the contents of the Interaction Database by using a filtered view.

Prerequisites

- Your account is configured to manage interaction queues.
- Your account is configured to move interactions to a queue.

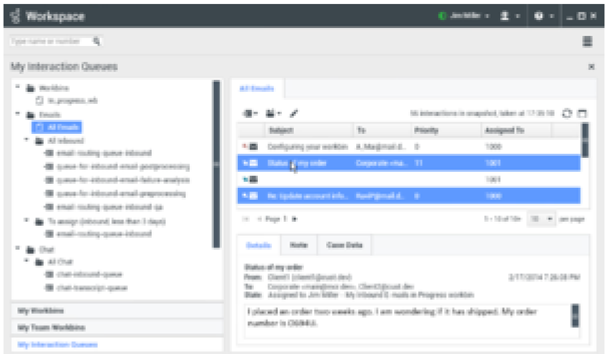
Start

1. In the Main Window, click the **Access and use Workspace supporting views** button (☰) to display the **Supporting Views** menu, then select **My Interaction Queues**. The My Interaction Queues view contains a list of all of the interaction filters that are configured by your administrator.
2. In the Workbins Explorer view, click the Interaction Queue that you want to view and manage. The list of queues is displayed under the filter name.
3. Click a queue to display its contents in the Workbin view to the right.



Workbins view in the My Interaction Queues view of the Workspace Main Window

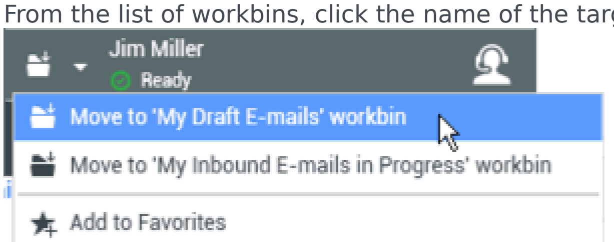
4. Click an interaction to select it. The contents of the interaction are displayed in the Details tab. You can also view the Notes and Case Data tabs by clicking them.



Selecting multiple interactions.

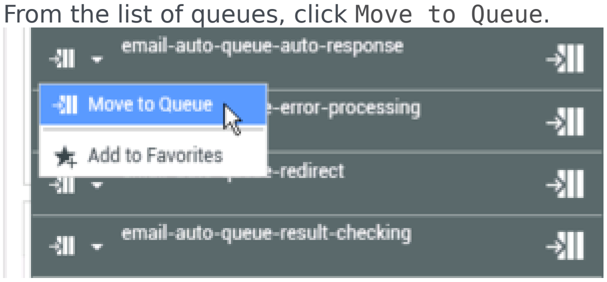
To select more than one interaction, use **Shift-click** to select a range or **Ctrl-click** to select multiple items.

5. Depending on the permissions that are granted to you, you can choose to move the selected interaction to the workbin of a target agent or to a queue:
   - To move the selected interaction to a workbin, click `Move to Workbin` (). The Team Communicator is displayed.
     a. In the Team Communicator search field, enter the name of the target agent or agent group.
     b. From the list of targets that is displayed, click the Move to Workbin action menu that is beside the name of the target in the list to view the list of workbins that belong to the target.
     c. From the list of workbins, click the name of the target workbin.



Selecting a target workbin from the Team Communicator

     d. In the confirmation dialog box, click `Yes` to move the interaction to the target workbin or click `No` to cancel the action.
     e. If you clicked `Yes`, the interaction is moved to the target workbin.
   - To move the selected interaction to a queue, click `Move to Queue` (). The Team Communicator is displayed.
     a. In the Team Communicator search field, enter the name of the target queue.
     b. From the list of targets that is displayed, click the Move to Queue action menu that is beside the name of the target in the list.
     c. From the list of queues, click `Move to Queue`.



Selecting a target queue from the Team Communicator

d. In the confirmation dialog box, click `Yes` to move the interaction to the target queue or click `No` to cancel the action.

e. If you clicked `Yes`, the interaction is moved to the target queue.

6. If you want to update the "snapshot" view of the Interaction Queues, click `Refresh` ().

End

Related Information

- Workbins
- Team Lead

Change agent state and log off agents

[**Added:** 8.5.126.07]

In this lesson, you will learn how to change the status of the agents that you supervise.

This lesson contains the following sections:

- Changing the status of an agent
- Log off an agent

Changing the status of an agent

The Change Agent State feature is useful if you discover that an agent is in the wrong state. You can use the Team Communicator Action menu to set an agent to Ready or Not Ready (Not Ready Reasons are not supported) on all channels, which means all the channels that are listed in the menu, or on specific channels.

Important

- If an agent has set their status to **After Call Work**, **Not Ready <with the reason>**, or **Do Not Disturb**, these are displayed as **Not Ready** in Team Communicator.
- Since Team Communicator does not support these statuses, you cannot set an agent status from **Ready** to **After Call Work**, **Not Ready <with the reason>**, or **Do Not Disturb**, only to **Not Ready**.

Lesson: Changing the status of an agent

Purpose: To change the status of an agent who is currently in the wrong status.

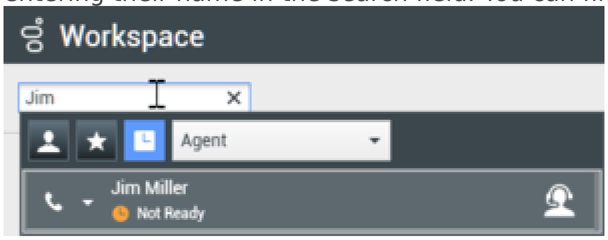
Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You are the Team Lead or Supervisor for an agent or agent group.
- Your account is set up to allow you to change the state of an agent that you supervise.

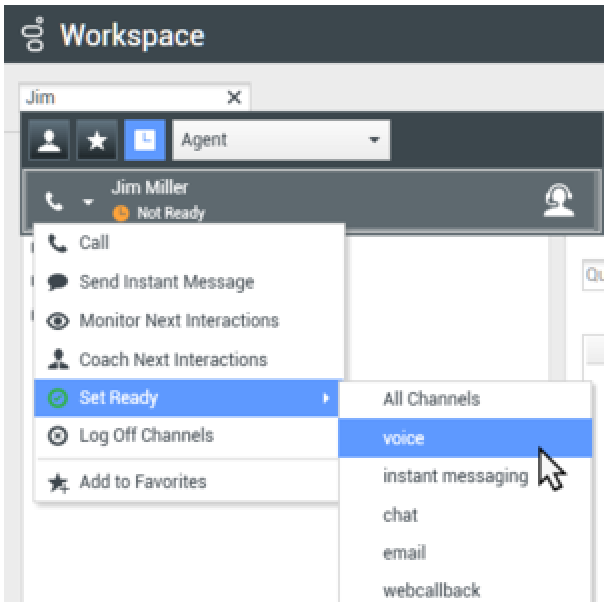
Start

1. When you identify that an agent is in an incorrect state, search for that agent in Team Communicator by

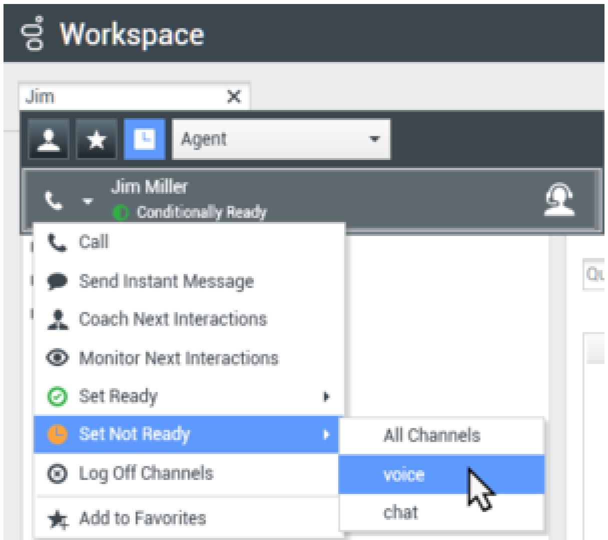
entering their name in the search field. You can filter by Agent, recents, and favorites.



2. If the agent's status is **Not Ready** and you want to change it to **Ready**, click the Action menu, then select **Set Ready** and then either **All Channels**, which means all the channels that are listed in the menu, or the specific channel that you want to set to **Ready**. The agent's state will be set to the new state.



3. If the agent's status is **Ready** and you want to change it to **Not Ready**, click the Action menu, then select **Set Not Ready** and then either **All Channels**, which means all the channels that are listed in the menu, or the specific channel that you want to set to **Not Ready**. The agent's state will be set to the new state.



End

Log off an agent

The Log off Agent feature is useful if you discover that an agent has forgotten to log off after their shift. You can use the Team Communicator Action menu to log off the agent on all channels; this is beneficial because it ensures that your company is not unnecessarily consuming seat/concurrent media licenses, and it also prevents interactions from being routed to an agent who is not present but is configured for auto-answer!

> **Important**
> The Log Off feature is not available for agents who are currently handling an interaction.

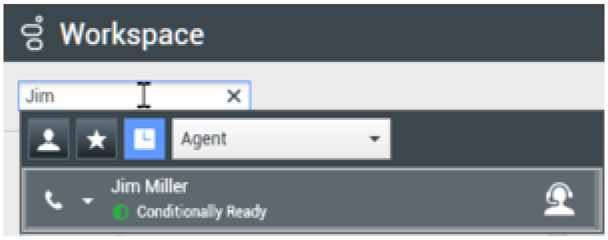
Lesson: Log off an agent

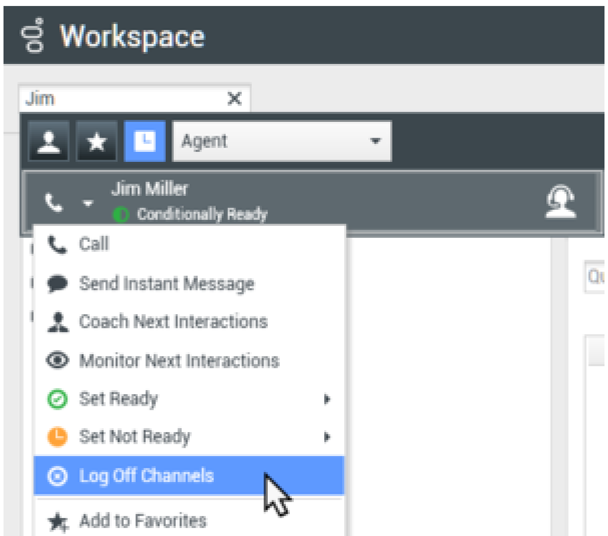
Purpose: To log off an agent who is currently logged on.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You are the Team Lead or Supervisor for an agent or agent group.
- Your account is set up to allow you to log offan agent that you supervise.

Start

1. When you identify that an agent is logged on but should be logged off, search for that agent in Team Communicator by entering their name in the search field. You can filter by Agent, recents, and favorites.


2. If the agent is status is **Ready**, **Conditionally Ready**, or **Not Ready** (or anything other than **Logged Off**) and you want to log them off, click the Action menu, then select **Log Off Channels**. The agent will be logged off all channels.


End

Related Information

- Team Lead
- Team Communicator

Contact Center Tasks

In this lesson, you will learn how to use the KPI, Statistics, receive business and system messages, and personalize your workspace.

This topic contains the following sub-topics:

- View KPIs And Statistics
- Receive Business And System Messages
- Connect to your voicemail messages
- Personalize Your Workspace

View KPIs And Statistics

Workspace provides two views of performance: `My Statistics` and `Contact Center Statistics`. The `My Statistics` view lists your Key Performance Indicators (KPIs). The `Contact Center Statistics` view displays statistics about the Switches, Routing Points, queues, and other objects.

This lesson contains the following sections:

- Viewing Your KPIs
- Viewing Contact Center Statistics
- Viewing Statistics by Using the Statistics Gadget

Viewing Your KPIs

There are two ways to view the `My Statistics` view:

- From the `My Statistics` tab of the Main Window Workspace (see Lesson: Viewing your Key Performance Indicators (KPIs))
- From the Statistics Gadget (see Viewing Statistics by Using the Statistics Gadget)

The `My Statistics` view displays your KPIs. Your system administrator configures the KPIs that are displayed to you. The following columns of information are available for each KPI:

- `Error/Warning Level`—The error or warning level, if either is exceeded
- `Key Performance Indicator`—A description of the statistic
- `Personal`—Your value for the statistic
- `<Agent Group Name>`—The value for the statistic for the agent groups to which you belong.

Lesson: Viewing your Key Performance Indicators (KPIs)

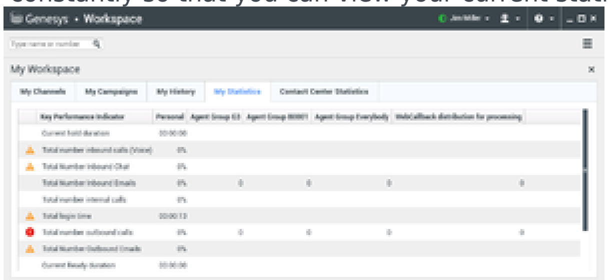
Purpose: To determine if you are meeting the performance targets that have been set for you by your contact center.

The `My Statistics` tab displays your current KPIs and agent group KPIs. The `My Statistics` tab enables you to compare your performance with other members of your team. Warning and error icons are displayed to indicate which KPIs require your attention.

Prerequisites

- You are configured to view your KPIs.
- You are logged in to Workspace (see Lesson: Logging in to Workspace).

Start

1. Click the **Access and use Workspace supporting views** button (☰) to display the **Supporting Views** menu, then select **My Statistics**. The list of your Key Performance Indicators (KPIs) is displayed (see the The My Statistics tab in the Main Window Workspace view figure). This view is updated constantly so that you can view your current statistics.


The My Statistics tab in the Main Window Workspace view
2. You can perform the following functions in the `My Statistics` tab:
    - Click column heads to change the sort order of the KPIs.
    - Right-click the `My Statistics` tab to access the shortcut menu that enables you to do the following:
        - Show or hide columns
        - Show or hide KPIs
        - Turn KPI filtering on or off to show only items that have warnings
3. To close the Workspace view, click `Workspace`.

End

Viewing Contact Center Statistics

There are two ways to view the `Contact Center Statistics` view:

- From the `Contact Center Statistics` tab of the Main Window Workspace (see Lesson: Viewing statistics about contact center resources)
- From the Statistics Gadget (see Viewing Statistics by Using the Statistics Gadget)

The `contact center Statistics` view displays statistics that summarize the state of various conditions that are monitored by your contact center, such as the percentage of abandoned calls, the average call-waiting time, and the number of interactions in a queue. Your system administrator defines which statistics and objects are displayed to you. The following columns of information are available for each monitored object:

- **Error/Warning Level**—The error or warning level if either is exceeded
- **Contact Center Resource**—A description of the type of object, such as a queue or a Routing Point
- **Description**—A description of the statistic
- **Value**—The value of the statistic

Lesson: Viewing statistics about contact center resources

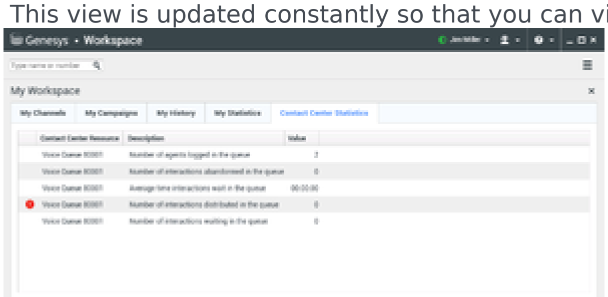
Purpose: To view statistics that summarize the states of various conditions that are monitored by your contact center, such as the percentage of abandoned calls, the average call-waiting time, and the number of interactions that are in a queue.

Prerequisites

- You are configured to view statistics for your contact center.
- You are logged in to Workspace (see Lesson: Logging in to Workspace).

Start

1. Click the **Access and use Workspace supporting views** button (☰) to display the **Supporting Views** menu, then select **Contact Center Statistics**. The list of statistics about objects in your contact center is displayed (see the Main Window Workspace view Contact Center Statistics tab figure). This view is updated constantly so that you can view statistics from minute to minute.

   Main Window Workspace view Contact Center Statistics tab

   Statistics about switches, Routing Points, queues, and other objects, are displayed in the `Contact Center Statistics` tab. You can drag column headings to change the order or the columns. Also, you can click a column heading to sort the objects based on the value of the column.
2. You can perform the following functions in the `Contact Center Statistics` tab:
   - Click column heads to change the sort order of the statistics.
   - Right-click the `Contact Center Statistics` tab to access the shortcut menu that enables you to do the following:
     - Show or hide columns
     - Show or hide statistics
     - Turn statistics filtering on or off to show only items that have warnings
3. To close the Workspace view, click `Workspace`.

End

Viewing Statistics by Using the Statistics Gadget

Statistics can be viewed either in the Main Window by selecting the `My Statistics` tab or the `Contact Center Statistics` tab in your Workspace, or by using the Statistics Gadget. The Statistics

Gadget is a view of statistics that you can leave open all the time.

The Statistics Gadget displays statistics in two ways:

- In a statistics ticker
- In a Tagged Statistics view

The advantage of the Statistics Gadget is that you can view your KPIs and Contact Center Statistics continuously, without opening your Workspace and clicking back and forth between tabs.

Lesson: Viewing your KPIs and Contact Center Statistics continuously by using the Statistics Gadget

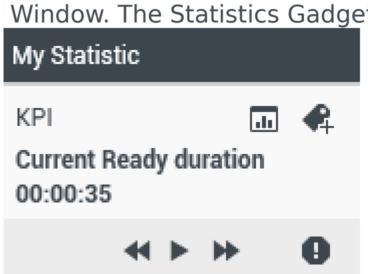
Purpose: To view your KPIs and Contact Center Statistics continuously without opening your Workspace and clicking back and forth between tabs.

Prerequisites

- You are configured to view your KPIs and/or you are configured to view statistics for your contact center.
- You are logged in to Workspace (see Lesson: Logging in to Workspace).

Start

1. To show the Statistics Gadget, select `Show Statistics Gadget` from the Main Menu in the Main Window. The Statistics Gadget is displayed (see the Workspace Statistics Gadget figure).



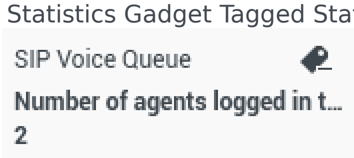
Workspace Statistics Gadget

The Statistics Gadget displays configured statistics in a ticking region. Each statistic is displayed for a specified period, then the next statistics is displayed.

2. Use the buttons at the bottom of the Statistics Gadget to control the view (see the Workspace Statistics Gadget figure):
   - To stop the ticker at a specific statistic, click the `Stop` button.
   - To start the ticker, click the `Play` button.
   - To view the next statistic, click the `Forward` button.
   - To view the previous statistic; click the `Back` button.
3. Warning and error icons are displayed if one or more statistics exceed or drop below threshold values that are configured by your administrator.
   - Click a warning or error icon to scroll immediately to the next statistics that is in a warning or error state.

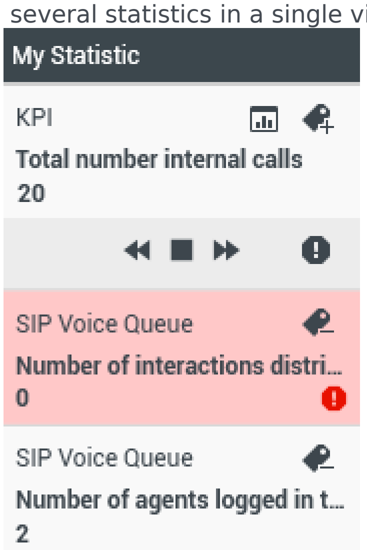
4. The Statistics Gadget enables you to tag specific statistics in a static view that is displayed below the ticker.

   - When a statistic is displayed in the ticker that you want to tag, click the Tag button: .
     The Tagged Statistics view is displayed below the Statistics Gadget ticker view (see the Workspace Statistics Gadget Tagged Statistic view figure).

     Workspace Statistics Gadget Tagged Statistic view

5. You can tag more than one statistic at a time. The Tagged Statistics view expands to accommodate several statistics in a single view (see the Workspace Tagged Statistic View stack figure).

   Workspace Tagged Statistic View stack

   The default maximum size of the Tagged Statistics view is five statistics; however, this value might be set to a different size by your administrator. If you have tagged more than the maximum number of stacked statistics, click the Up and Down arrow buttons at the bottom of the Tagged Statistics view stack to scroll up and down through your tagged statistics.

6. To untag a statistic, click the `Untag` button:
7. You can view your KPIs either as a graph or as text.
   - Click the `Graph View` button to view the statistic as a graph:
   - Click the `Text View` button to view the statistic as text:

End

Related Information

- My Statistics
- Contact Center Statistics

Receive Business And System Messages

Workspace provides functionality that enables you to receive, preview, and view messages that are directed to you, your group, or your role. This lesson contains the following section:

- Receiving and Viewing Messages

Receiving and Viewing Messages

Messages are displayed to you in three interfaces:

- The `My Messages` interactive notification
- The `My Messages` window
- The `My Messages` area in the Main Window

Lesson: Receiving and viewing messages on your desktop by using the Main Window

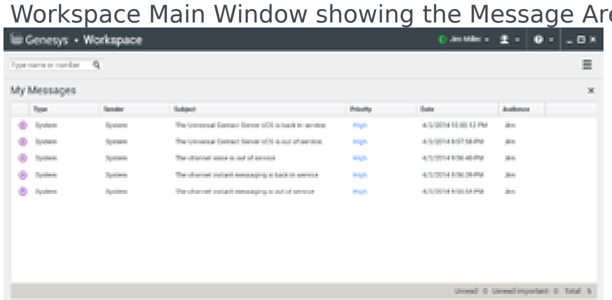
Purpose: To receive messages of varying importance that are directed to you, your group, or your role by your supervisor or administrator.

Prerequisites

- You are configured to receive broadcast messages.
- You are logged in to Workspace (see Lesson: Logging in to Workspace).

Start

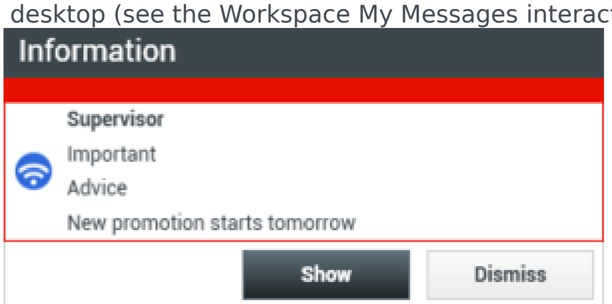
1. In the Main Window, click the **Access and use Workspace supporting views** button () to display the **Supporting Views** menu, then select **My Messages**. You can view any system or business messages that you might already have received. The messages are displayed in a scrolling list with the most recent message at the top. Messages that are displayed in bold have not been read (see the Workspace Main Window showing the Message Area open and displaying current messages figure).



Workspace Main Window showing the Message Area open and displaying current messages

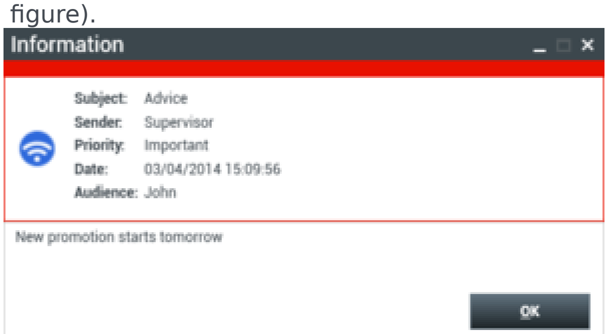
2. To read a message that is displayed in the Message Area, do one of the following:
   - Hover your mouse pointer over the message to view a pop-up that displays the content of the message.
   - Double-click the message to open the `My Messages` window.

   Depending on the configuration if your system, you might be able to mark some or all messages as read/unread or delete messages. To perform an action on a message do one of the following:
   - Right click an unread message in the message view and select **Mark as Read** from the context menu.
   - Right click a read message in the message view and select **Mark as Unread** from the context menu.
   - Right click a message in the message view and select **Delete** from the context menu.
3. If a new message is directed to you, the `My Message` interactive notification is displayed on your desktop (see the Workspace My Messages interactive notification figure).



Workspace My Messages interactive notification

   Do one of the following:
   - Click `Show`—Displays the Message window. The message is also displayed in the Messages Area of the Main Window. The message is marked as Read.
   - Click `Dismiss`—Closes the interactive notification. The message is displayed in the Messages Area of the Main Window. The message is marked as Unread (displayed in bold in the Message Area).
   - Do nothing—The interactive notification is dismissed automatically after a time interval that is defined by your system administrator; the message is displayed in the Messages Area of the Main Window. The message is marked as Unread (appears in boldface in the Message Area).
4. If you clicked `Show`, the Message window is displayed (see the Workspace Business Message window figure).



Workspace Business Message window

   The Message window contains the full content of a message that has been directed to you, your group, or your role. As well as displaying the content of the message, the Message window might contain the following information:

- **Message Type**—This information might be conveyed by text, the title bar, and/or an icon.
- **Subject**—Information about the content of the message.
- **Sender**—The identity of the sender of the message.
- **Priority**—This information might be conveyed by text and/or by the color of the border that surrounds the information about the message.
- **Date**—The date and time that the message was sent.
- **Audience**—The target audience of the message.
- Other data that is defined by your administrator.

Click `OK` to close the Message window.

5. If you clicked `Dismiss`, or if you allowed the interactive notification to time-out by not clicking either button, the Message window is not displayed. To view the contents of the message, you must open the Message Area in the Main Window (see the Workspace Main Window showing the Message Area open and displaying current messages figure).

End

Related Information

- My Messages

Connect to your Voicemail Messages

[**Added:** 8.5.100.05]

In this lesson, you will learn how to determine whether you have waiting voicemail messages and how to connect to your voicemail box.

> **Tip**
> Workspace might be configured by your administrator to enable you to view your voicemail boxes and connect to your voicemail boxes by using the Workspace main view.

Lesson: Connecting to your Voicemail Messages

Purpose: To determine whether or not you have unplayed voicemail messages and to connect to your voicemail boxes.

Prerequisites

- Your account is enabled to view the status of your voicemail box in the Workspace main view.
- You are logged into Workspace (see Getting Started).
- You have unplayed voicemail messages.

Start

1. If you have unplayed voicemail messages, a "messages waiting indicator" (6) is displayed on the **Access and use Workspace supporting views** button ().

   > **Tip**
   > The message waiting indicator displays the number of unplayed messages in your voicemail box(es) and the number of unread system messages. Your system administrator can configure Workspace to display the sum of the number of messages in your personal voicemail box, group voicemail boxes, and/or your **My Messages** view.

2. To view the status of your voicemail boxes, hover your mouse pointer over the message waiting indicator. A tooltip is displayed that lists the number of messages in each of your voicemail boxes and the **My Messages** view.
3. To access your voicemail box(es), click to display the **Supporting Views** menu.

   Your voicemail boxes are displayed in the menu.

If you have voicemail messages that you have not played, a "messages waiting indicator" (6) is displayed beside the name of each of the voicemail boxes that your administrator has granted you access.

4. To call your voicemail box, select it from the **Supporting Views** menu.

   A new internal interaction is launched.

5. Use the keypad to enter your authentication.

End

See also: View and Connect to Your Voicemail Messages in the *Workspace 8.5.1 Help*.

Related Information

- View and connect to your Voicemail messages

Personalize Your Workspace

[**Modified:** 8.5.109.16, 8.5.100.05]

You can change the appearance of the Workspace interface by choosing a predefined appearance from the `Change Theme` submenu. This lesson contains the following section:

- Changing the Appearance of Workspace
- Changing the Zoom of Text Fields

Changing the Appearance of Workspace

You can change the way that Workspace looks by using a menu selection. Workspace provides the default 8.5 theme, the classic 8.1 `Blue` theme, and two alternate 8.1 themes: `Royale` and `Fancy`.

> **Tip**
> Your system administrator might also have created additional themes for you to use.

Lesson: Changing the appearance of the agent interface

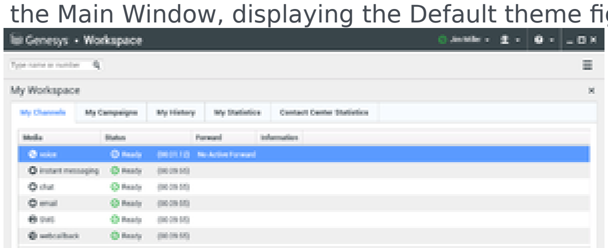
Purpose: To alter the appearance of the Workspace interface.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).

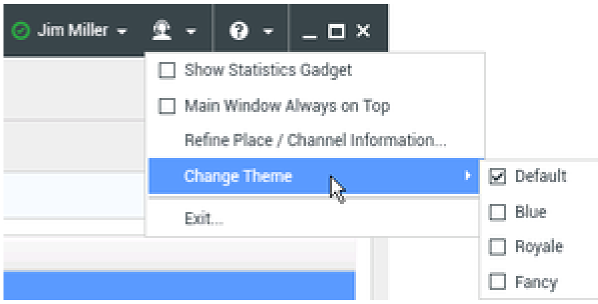
Start

1. The flat grey appearance of Workspace is the default color scheme; it is called the `Default` theme (see the Main Window, displaying the Default theme figure).



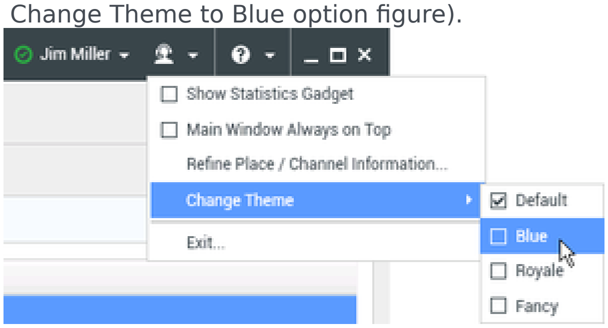
Main Window, displaying the Default theme

To change the color scheme of Workspace, in the Main Window, open the `Main Menu` (see the Main Window Main menu figure).



Main Window Main menu

2. Select a different theme from the Change Theme submenu (see the Main Window Main Menu, displaying Change Theme to Blue option figure).



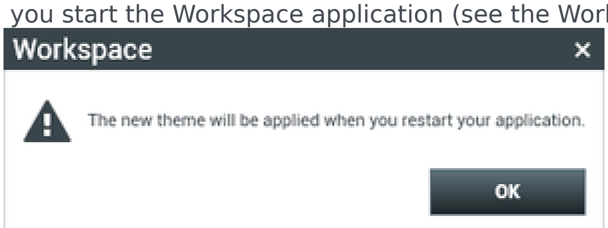
Main Window Main Menu, displaying Change Theme to Blue option

Workspace provides three additional themes that are based on the 8.1 interface, which are called `Blue`, `Royale`, and `Fancy`.

Important

- Your system administrator might have configured additional theme options from which you can choose.
- For visually impaired agents, your administrator can configure the system to make the Workspace High Contrast theme available to you in the **Change Theme** menu. This theme is designed to meet the Web Content Accessibility Guidelines (WCAG) 2.0, with some limitations. This theme might already be available to you.

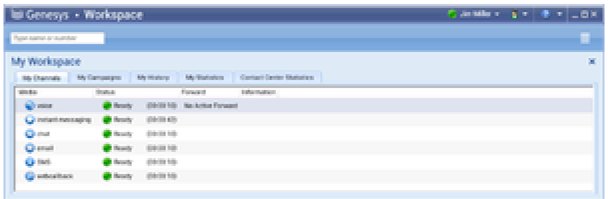
3. A Workspace message is displayed to inform you that the new theme will be applied the next time that you start the Workspace application (see the Workspace message figure).



Workspace Change Theme message

Click OK to dismiss the message.

4. Exit and then restart Workspace.
The Main Window and all the other windows of Workspace are displayed with the new theme (see the Main Window displaying the Blue theme figure).



Main Window displaying the Blue theme

End

Changing the Zoom of Text Fields

[**Added:** 8.5.109.16]

Your environment might be set up to allow you to use the Zoom slider control in the **Main Menu** to set the size of the text in various Workspace windows, including:

- IM (text entry, transcript, and interaction data tooltip)
- Chat (text entry, transcript, and interaction data tooltip)
- Email (text entry and inbound email view)
- SMS (text entry, transcript, and interaction data tooltip)
- Interaction history (IM, Chat, Email, and SMS)
- Standard responses
- Social media (text entry only)

Lesson: Changing the zoom of text fields in the agent interface

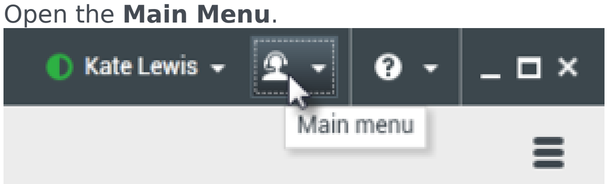
Purpose: To alter the appearance of the Workspace interface.

Prerequisites

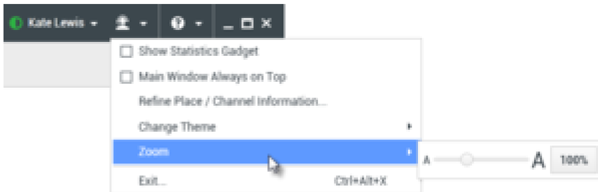
- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- Your adminstrator has enabled the zoom feature for text fields in your environment.

Start

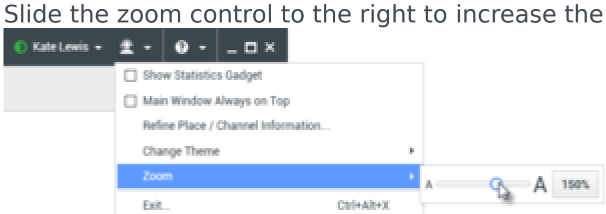
1. Open the **Main Menu**.

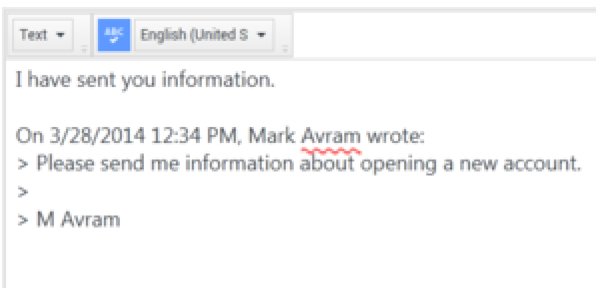


2. Choose **Zoom** to display the Text Zoom slider control.

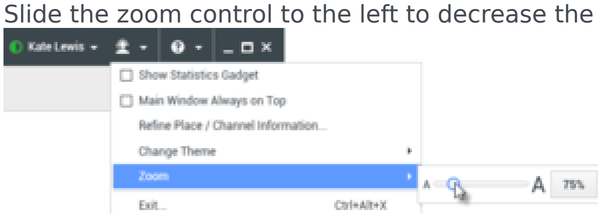


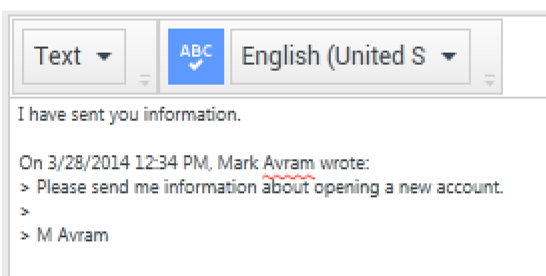
3. Slide the zoom control to the right to increase the size of text in text composition and transcript fields.



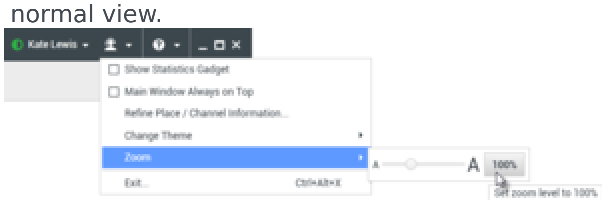


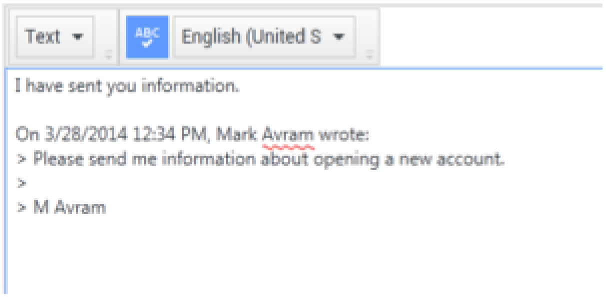
4. Slide the zoom control to the left to decrease the size of text in text composition and transcript fields.





5. Slide the zoom control back to **100%** or click the Zoom Percent button to set the zoom level back to normal view.





End

Related Information

- Manage your settings and preferences

What's New in Workspace?

New in Workspace 8.5.128.07

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.128.07:

- Chat interactions might now automatically close and be marked done, either immediately or after a certain time interval, when the contact disconnects. This feature is set up by your administrator.

New in Workspace 8.5.127.06

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.127.06:

- Agents can change the reading direction of the text when using a mix of right-to-left or left-to-right scripts when replying to an inbound email interaction.

New in Workspace 8.5.126.07

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.126.07:

- Team Leads and Supervisors can now remotely change the state of an agent or log off an agent.

New in Workspace 8.5.122.08

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.122.08:

- The Chat interface has been improved in several ways:
    - Instead of plain text, the chat transcript now displays the conversation in colored blocks to make it easier to distinguish messages from different participants.
    - A message not read indicator lets you know if your message was seen or not.
    - Messages from older chat interactions with the same contact are now included in the chat transcript to make it easier for you to find historical content from your current contact.
- The SMS and IM interfaces have been improved. Instead of plain text, the message transcript now

displays the conversation in colored blocks to make it easier to distinguish messages from different participants.

New in Workspace 8.5.118.10

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.118.10:

- You can now call or transfer calls to voicemail if this feature is available in your environment.
- You can now create and manage hyperlinks in outgoing email and other text based interactions.
- You can now use shortcut keywords to add responses to your outgoing text based interactions.
- You can now use a folder tree to search for and add or change case information in the Case Information area of interactions.

New in Workspace 8.5.117.18

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.117.18:

- Your administrator might have enabled the feature that highlights your current interaction in the Contact History view of the current interaction. If the current interaction is not on the first page of the view, the view is scrolled to the position of the current interaction.
- Your administrator might have enabled the feature that requires you to specify a call result or disposition before you transfer an Outbound campaign call to another agent.
- Your administrator might have enabled the feature that makes editable case information fields mandatory. If so, a red asterisk is displayed next to the field in the Case Information view, and you will not be able to close the interaction without editing the field.

New in Workspace 8.5.116.10

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.116.10:

- You can now view the search results in the Interaction Search view in either Grid view or Tree view. This brings this view in parity with the My History and Contact History views.
- If you are allowed to work on more than one interaction at the same time, your administrator can now specify whether or not new interactions that you accept have the focus, or appear in the background.

New in Workspace 8.5.115.17

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.115.17:

- You can now send and receive files and images during chat interactions. See updates to the lesson, *Handling an inbound chat interaction*.
- You can now send and receive emojis (emoticons or 'smileys') during chat interactions. See updates to the lesson, *Handling an inbound chat interaction*.
- In Outbound Campaigns, rescheduling a callback has been modified. Your account might be set up so that you cannot schedule personal callbacks.
- In Outbound Preview Campaigns, your account might be set up to enable you to manually enter a phone number to call your contact.

New in Workspace 8.5.114.08

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.114.08:

- Your contact center might use Place Group pools instead of Places for login. Refer to Logging in to a Place Group for more information.

New in Workspace 8.5.113.11

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.113.11:

- Workspace enables you to insert images into outgoing email interactions and to view and save images that your contacts have inserted into inbound email interactions.
- Workspace enables you to insert TAB characters into outgoing email interactions unless your account is configured for Accessibility.
- Workspace enables you to Forward emails in-line as well as forwarding emails as attachments. This feature is available from the following views:
  - Inbound email interaction
  - My History
  - Contact History
  - Interaction History
- The Chat Interaction bar now flashes to warn you about different changes to the status of a Chat interaction. Infomration about this has been added to a tip in the Handling a Chat interaction lesson.

New in Workspace 8.5.112.08

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.112.08:

- The login dialog box was modified to make it easier for agents who sit at different workstations to notify the system that they are using a different Place (phone set and workstation).

New in Workspace 8.5.111.21

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.111.21:

- Your administrator might have added new call timers to your Workspace. For a demonstration of the various call timers, including Total Duration, Hold Duration, and After Work Duration that might be available for you to use, see the Call Timers section in the *Workspace 8.5 Help*.
- Workspace now supports Genesys Mobile Server (GMS) Callback interactions. You can handle Callback interactions directed to you by the system, or create Callback interactions for a contact.

New in Workspace 8.5.110.13

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.110.13:

- You can now search/filter the list of interactions in a Workbin or Interaction Queue.
- You can now manually refresh the list of interactions in a Workbin.
- You can now receive, handle, and view Multimedia Message Service (MMS) images sent from your contacts and transfer them to internal targets.
- You can now mark interactions that are in the "in-progress" state as Done and delete outbound email interactions in the Contact Interaction History, My History, and Interaction Search views. Refer to the following lessons:
    - Manage Contact History
    - Manage Your History
    - Manage Contacts and Contact Information
    - Find Interactions

New in Workspace 8.5.109.16

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.109.16:

- If your administrator has enabled the feature, you can now adjust the size of text in text composition and transcript fields.
- You can now suspend and reinstate a party in a conference call to temporarily prevent a party from listening to the call and talking in the conference.
- Your administrator might have set up your account to automatically dial Preview and Push preview campaign interactions.
- Information has been added for agents working in Remote and Virtual Desktop Environments regarding trouble shooting the Workspace SIP Endpoint during login and disconnection.

New in Workspace 8.5.108.11

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.108.11:

- When you Log In, you can uncheck media that you are not going to use in your session.
- You can Manage Your Status to logoff media channels during your session.
- When you Handle A Chat Interaction you might be allowed to see what your contact is typing before they send their message to you.
- You might now be able to use a folder hierarchy to choose Disposition Codes.

New in Workspace 8.5.106.19

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.106.19:

- A note about auto-collapsed interaction control bars in the Interaction Toolbar has been added.

New in Workspace 8.5.105.12

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.105.12:

- Your administrator can now configure your system to display a message any time that you try to send a Chat, Email, or SMS interaction that contains misspelled words.
- You can now double-click a Standard Response to insert the content into your interaction.
- If your account is configured for auto-answering inbound interactions, you might be able to preview the inbound interaction before it is auto-answered. the following lessons have been updated for this feature:
    - Handling an inbound voice interaction
    - Handling a web callback interaction

- Handling a push-preview Outbound-Campaign voice interaction
- Handling an inbound chat interaction
- Handling an inbound email interaction
- Handling an inbound SMS interaction
- Handling an inbound workitem interaction

New in Workspace 8.5.104.15

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.104.15:

- The Forward to an External Resource feature has been expanded to enable you to forward an email interaction to multiple targets, including carbon copying targets, and to add instructions about the email to the target(s).
- The Interaction Search feature enables you to find interactions based on multiple criteria, including words in the body or transcript of the interaction.
- The Manage Contact History topic was modified and divided into subtopics:
    - Manage Contact History
    - Manage Your History
    - Manage Contacts and Contact Information
    - Find Interactions

New in Workspace 8.5.103.10

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.103.10:

- A note has been added to the Lesson: Starting a voice consultation about automatic or manual hold release during a consultation call.
- In some environments you might be required to set a disposition code before you can transfer or forward an email interaction.

New in Workspace 8.5.102.06

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.102.06:

- A note has been added to the Lesson: Logging in the Workspace about Single-sign on login.

New in Workspace 8.5.101.14

The following content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.101.14:

- When a Workspace application update is pushed out by your administrator, your system might be configured to prevent you from rejecting the update. A note about rejecting updates has been added to the following topic:
  - Getting Started
- You can now print email interactions from the following views:
  - Workbin
  - Contact History
  - My History
- Some agents might not have permission to edit some or all of the fields in a contact record. Notes have been added to the following topics:
  - Lesson: Adding a Contact
  - Lesson: Updating Contact Information
- The following note was added to each lesson that includes information about accepting/rejecting interaction notifications:

> **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 window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. 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.

New in Workspace 8.5.100.05

The following new content has been added to the Workspace 8.5.1 User's Guide for Workspace Desktop Edition 8.5.100.05:

- The voicemail feature has been added.
- A note about using the Workspace High Contrast theme has been added to the Personalize Your Workspace lesson.