Outbound Contact Deployment Guide

Outbound Record Sharing Between Multiple Desktops

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Outbound record sharing between multiple outbound-enabled desktops is possible when the outbound call is made for a certain record (that is, a call with the GSW_RECORD_HANDLE key and a valid record handle value attached to it) is transferred or conferenced between two or more agent places. For proper record sharing, OCS must monitor all of the DNs that participate in the call transfer or conference. In addition, all agents who intend to share the record must be logged in.

There are three possible scenarios for sharing records.

Scenario 1: Outbound Call Single Step Transfer or Mute (Blind) Transfer

Upon a successful transfer completion, all rights to the record and chained records access are revoked from the agent who initiated the transfer and are granted to the agent who received the transferred call.

Scenario 2: Outbound Call Two-step Transfer with Consultation Call

During the consultation phase of the transfer (or conference), when the consultation call is established on the agent's DN who should receive the transferred call (or be added to the conference), this agent has read-only permissions for the record. No desktop events will be accepted from this agent, except for a request for chained records (ChainedRecordRequest), which are also passed to the agent desktop in the read-only mode.

Scenario 3: Outbound Call Conference

All agents participating in the conference call have full access to the record (and chained records of the same chain) and the right to update the chain (that is, by sending desktop protocol events for specific record handling).

Note:	During the conference scenario, when more than one agent has full access to the record, record access is concurrent. This means, that if one agent sends the RecordProcessed event for the record and receives an Acknowledgement from OCS, the other agent(s) will not be able to update this record anymore.