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Genesys Engage cloud Agent's Guide

Genesys Engage cloud Public

12/29/2021

Table of Contents

Agent's Guide	**6**
Accessing your Genesys Engage cloud applications	**8**
Agent Desktop (v8)	**12**
Getting started (v8)	13
Channels (v8)	22
Calls (v8)	25
Email (v8)	32
Chat (v8)	39
Facebook (v8)	41
Twitter (v8)	50
Customer interactions (v8)	55
Contacts (v8)	60
Contact and interaction history (v8)	66
Workbins (v8)	73
Standard responses (v8)	74
Co-browse sessions (v8)	77
Internal interactions (v8)	88
Outbound campaigns (v8)	96
Navigating Agent Desktop (v8)	102
Agent Desktop (v9)	**115**
Introducing Agent Desktop 9	122
Getting started	144
Navigating Agent Desktop	166
Team Communicator	182
"How To" Videos	193
Channels and the Channels tab	197
Calls	200
Outbound campaigns	213
Email	224
Chat	235
Facebook Chat	253
Twitter Chat	261
WhatsApp Chat	269
SMS Chat	275
Workitems	282

Standard responses	285
Co-browse sessions	289
Altocloud Chat Interaction	296
Contacts and interactions	299
The Contact Directory and contact management	302
Interaction history views	310
Workbins	321
Internal interactions	330
Voicemail for Agents	**342**
Genesys Softphone	**345**
Gplus Adapter User Guide (v8)	**351**
Gplus Adapter (v8) for Salesforce	352
Getting started (v8)	353
Logging in (v8)	357
Changing Your Status (v8)	363
Navigating to a Channel (v8)	367
Handling calls (v8)	368
Answer incoming calls (v8)	377
Dial a call (v8)	380
Caller Identification for outbound calls (v8)	385
Transfer a call (v8)	386
Conference calls (v8)	387
Consultations (v8)	389
Call back a disconnected participant (v8)	393
Recording a Call (v8)	395
Working with the Chat channel (v8)	397
Chatting with a customer (v8)	404
Managing multiple chat interactions (v8)	408
Transferring a Chat (v8)	410
Chat consultations (v8)	411
Case Information management (v8)	413
Voicemail (v8)	416
Contact management (v8)	417
Viewing your reports (v8)	421
Submitting feedback (v8)	424
Gplus Adapter for Salesforce - Agent Desktop option (v8)	426
Lightning Experience (v8)	431

Gplus Adapter for Salesforce (v9)	**433**
Getting started	435
Working with Gplus Adapter	439
Click-to-dial	442
Screen Pops	444
Activity History	447
Gplus Adapter for Microsoft Dynamics 365	**451**
Workforce Management 8.5.1	**452**
Workforce Management Web for Agents overview	453
Getting Started	461
Login Timestamp	464
Menu Options	466
Changing the Date	467
Logging Out	469
Session Expiration	470
Schedule	471
My Schedule	472
Other Schedules	476
Trading	478
Trading Windows Road Map	480
Trading Windows for Specific Tasks	483
Reviewing My Proposals and Their Responses	484
Reviewing My Responses to Other Agents' Proposals	486
Creating Trade Proposals	488
Adding Comments to a Trade	490
Viewing Personal Proposals Available to Me	491
Viewing Community Proposals	492
Viewing Other Agents' Schedules	494
Viewing Other Agents' Schedule Details	496
Preferences	498
Adding and Editing Shift Preferences	502
Adding and Editing Availability Preferences	503
Adding and Editing Day Off Preferences	504
Availability Patterns	505
Using Patterns for Availability Preferences	507
Time Off	509
Time Off Pane	510

- Time Off Limits Grid 515
- Requesting Time Off 517
- The Time Off Autogrant Feature 519
- Time Off (Vacation) Bidding 521
- Wait-Listing Notes 523
- Editing Time Off 524
- Deleting Time Off 526
- Recalling a Time-Off Request 528
- Entering Comments 529

Bidding 530
- Bidding Scenarios View 531
- Bidding Assignment Pane 532
- Bidding Details View 535
- Bidding Assignment Filter View 536
- Bidding Assignment Sort View 537
- Bidding Assignment Desired View 538
- Bidding Assignment Unwanted View 539

Configuration 540
- The Personal Pane 541
- The Shared Transport Pane 543
- Exception Totals Pane 548

Agent's Guide

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Basics

- Getting started
- Digital channels
- What are Interactions?
- Connecting with other agents
- Navigating the Interface
- Using the Agent Desktop v9

Channels

- Voice calls
- Email
- Chat
- Outbound campaigns
- Facebook
- Twitter

Managing Contacts

- Finding contacts
- Finding past interactions
- Work in-progress

GPlus Adapter

- Gplus Adapter for Salesforce
- Gplus Adapter for Salesforce - Agent Desktop option
- Gplus Adapter for Microsoft Dynamics 365

Workforce Management

User's Guide

What is the role of an Agent ?

An agent is the front line of the contact center. They communicate with customers and fellow team members through various channels, such as voice calls, chat, and email.

As an agent, you can be assigned to specific channels, consult with team members, and assist customers by providing standard responses to their questions.

Ready? Watch the video for a quick tour of Agent Desktop, and then get started.

Looking for answers to specific questions? Try these topics:

- Customer interactions
- Internal interactions
- Channels
- Contact Directory
- Reports on how I'm doing and how my contact center is doing

Lost? See Navigating Agent Desktop.

About Genesys Engage cloud

Genesys Engage cloud architecture leverages the world-class SIP-based GVP/Media Services products at the core of Genesys Engage while providing the full Genesys Engage suite of services in the cloud. This offer is customizable to meet the needs of enterprise customers, whether they need a large number of seats, heavy-duty premise system integration, or bespoke routing and reporting. Built on market-leading universal queuing and routing features, the full Genesys Engage suite will add the ability to support blended agents of any type, including blending inbound with outbound, voice with e-Services, or any other combination.

Accessing your Genesys Engage cloud applications

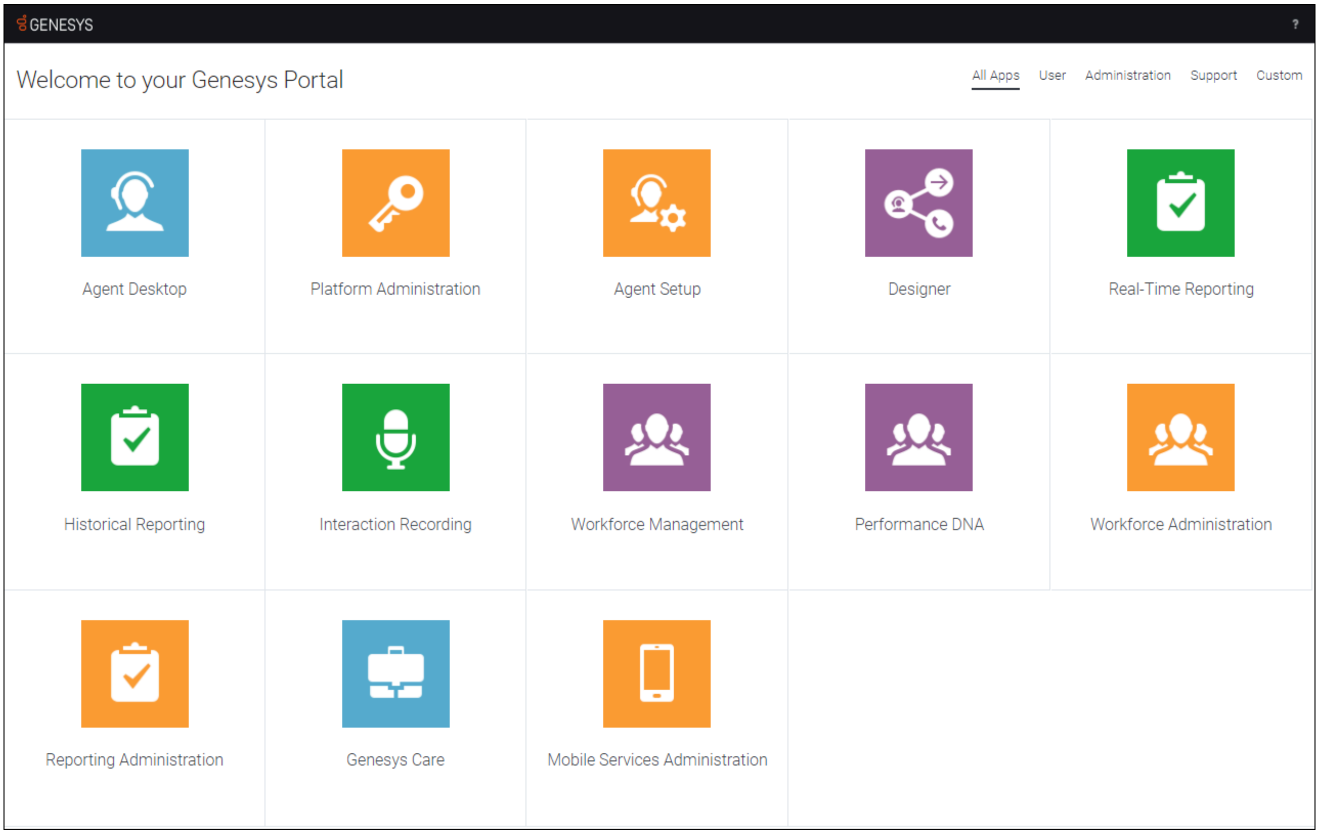
Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

The Genesys Portal is your single point of access to applications within Genesys Engage cloud.

Related Topics

Get started with Genesys Portal



Use your browser to access the Genesys Portal landing page (your Administrator or Supervisor will provide the link).

All of your company's Genesys applications can be found on the **All Apps** screen. These applications are also divided into categories, which you can select by clicking the corresponding category links at the top right of the Portal.

The out-of-the-box categories are:

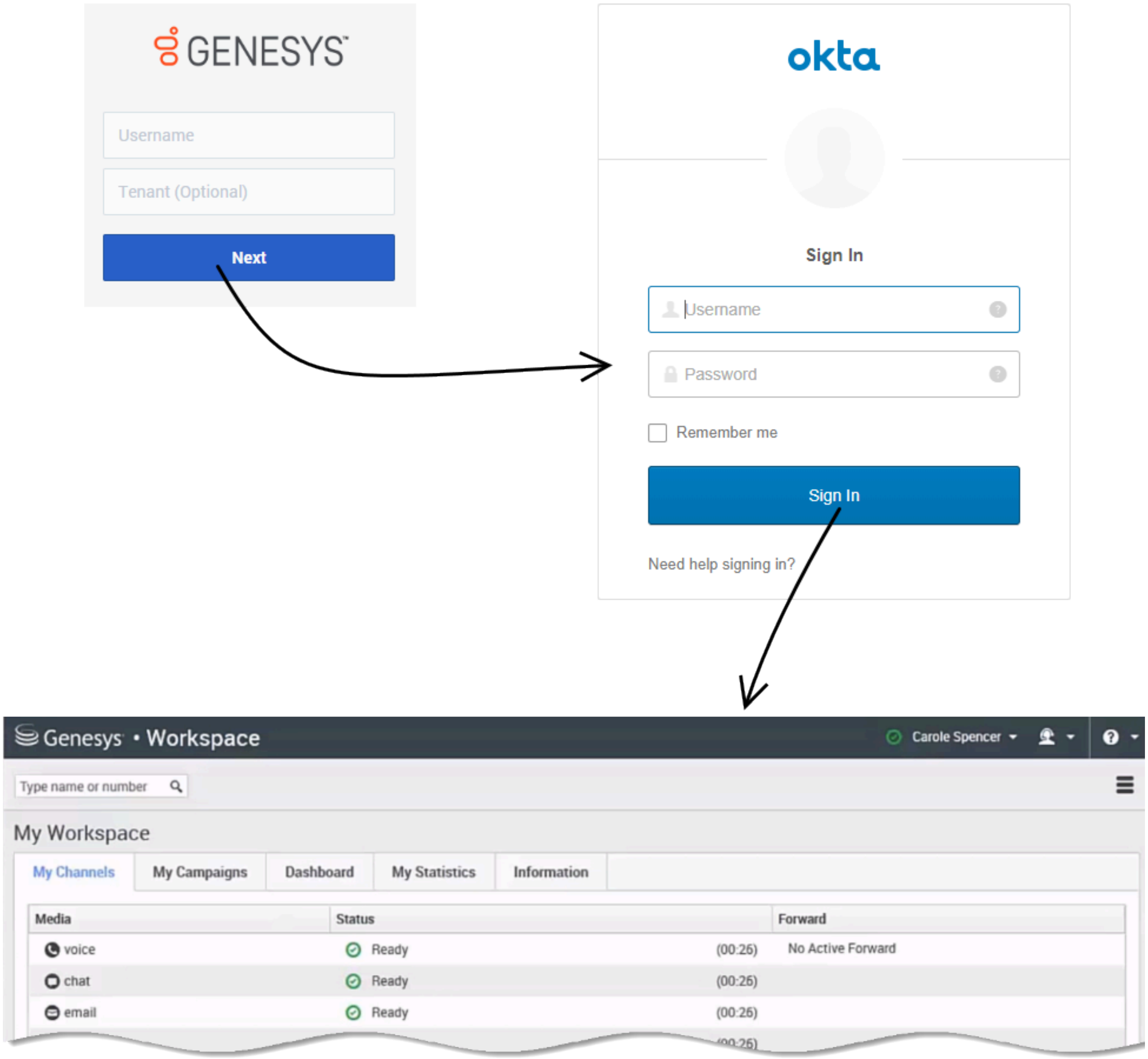
User – User applications can be used by contact-center agents and supervisors, such as Agent Desktop, Workforce Management, and Reporting.

Administration – Administration applications can be used by contact-center administrators and supervisors to configure users and applications based on their roles.

Support – Support applications are used by authorized contact-center administrators to submit requests with Genesys Customer Care, and to view the status and schedule of service for Genesys applications.

Documentation and **eLearning** are accessed via the Help () menu, located in the top-right corner of Genesys Portal.

Using the Genesys Single Sign-On feature



Genesys Single Sign-On (SSO) is an optional feature that allows you to access multiple applications with a single username and password. Once you are signed in to one SSO-supported application, you can open all other SSO-supported applications without having to re-enter your login information.

Let's look at the login process for Agent Desktop with SSO enabled.

First, click the Agent Desktop icon in Genesys Portal and enter your username. You must log in to the application even though you're already logged in to your workstation.

Click **Next** and you will be prompted to enter your username and password. Once you are authenticated, you're redirected back to Agent Desktop and automatically logged in.

Now that you're authenticated, you can choose any SSO-enabled application from Genesys Portal and you'll be automatically logged in without entering your credentials.

If you happen to close all browser tabs without logging out of the applications, you will remain logged in for five minutes. If a second window or browser is opened after five minutes, to either the same application or any other SSO-enabled application, you will once again be prompted for your credentials.

Agent Desktop (v8)

Agent Desktop lets contact center agents communicate with customers and team members through channels such as calls, chats, and email.

If you are looking for the Agent Desktop v9 help, it is here.

Link to video

You can

- respond to or contact customers through the channels assigned to you
- get help from team members
- find standard responses to customer questions
- make sure that you are meeting your center's expectations
- Change your status to **Ready** when you are ready to receive new interactions or **Not Ready** when you need more time to work on your current interaction or are away from your desktop. Your system might be set up to enable you to extend your after call work.

Ready? Watch the video for a quick tour of Agent Desktop, and then get started.

Looking for answers to specific questions? Try these topics:

- Customer interactions
- Internal interactions
- Channels
- Contacts

Lost? See Navigating Agent Desktop.

Tip

The pictures and videos in this Help document show native Genesys Agent Desktop. Your company might have customized many features including corporate logos and the name of the product. This document uses the name Agent Desktop to mean the application that you use to handle calls and other interactions, and to manage your work and your contacts.

Getting started (v8)

Agent Desktop is your gateway for handling calls (both inbound and outbound) and other interactions, such as chat or emails.

Important

What you see in Agent Desktop depends on your contact center and your role within it, so you might not be able to do or see all the things covered in this help. If you think you should be able to do or see something you can't, check with your supervisor or system administrator.

Now that you know what Agent Desktop is, you're probably wondering how to use it. This Getting Started page will get you logged on and ready to take a call. Let's get started.

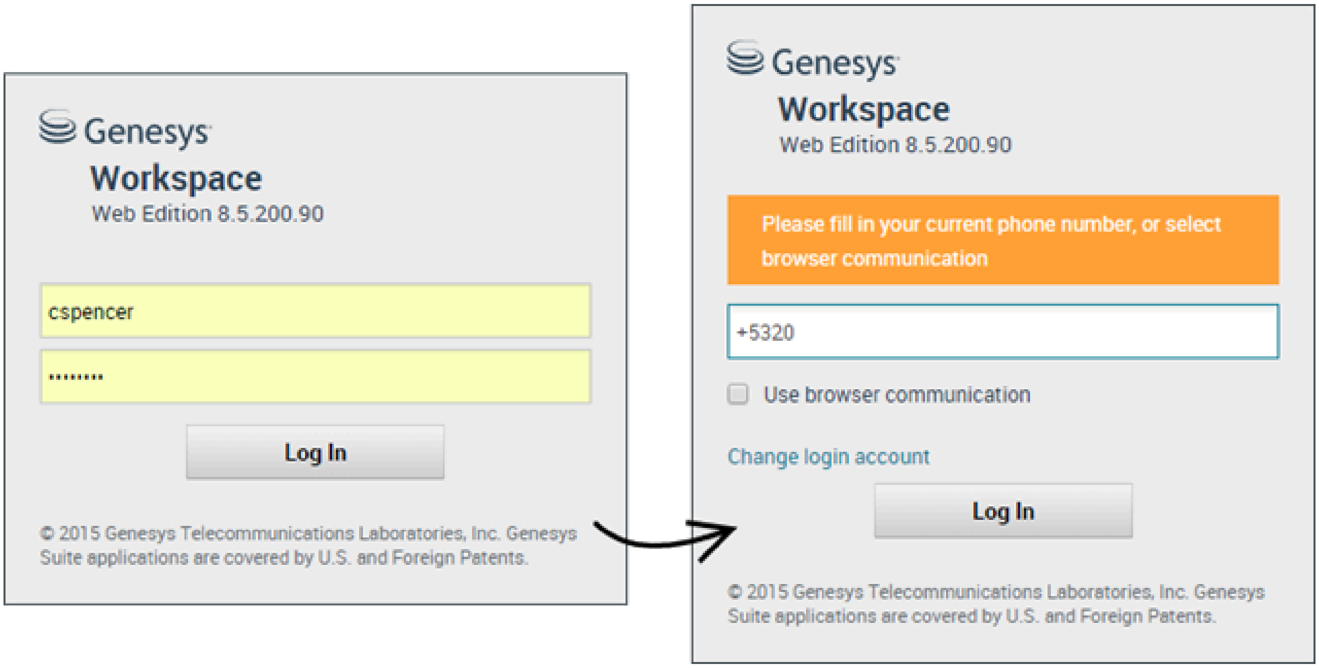
Tip

- The pictures and videos in this Help document show native Genesys Agent Desktop. Your company might have customized many features including corporate logos and the name of the product.

Agent Desktop video tutorials

Check out this video about how to handle a phone call!	Link to video

Log in to Agent Desktop



Open a supported browser (if you are using browser communication, use Chrome) and go to the link for Agent Desktop that your supervisor gave you.

Log in with your username and password. You might also have to enter some additional information:

- If prompted, enter your phone number, place, or preferred language.
- If your system uses browser communication, select **Use browser communication**.
- If this is your first time logging on, a dialog box might be displayed asking you to change your password.

If you are not sure about any of the prompts, ask your supervisor for help.

Tip: Clicking **Change login account** takes you back to the main log in screen.

Tip: Agent Desktop has a security feature that might be set up for your account that logs you out if you stop using Agent Desktop or your computer for a while. Agent Desktop first displays a message to warn you that you are going to be logged out. If Agent Desktop logs you out, just log back in again when you are ready to start using Agent Desktop.

Tip: Agent Desktop does not let you change your password. Contact your administrator to have your password changed.

Important

Hot Seating — In your environment, you might either have a single phone number assigned to you at all times, or you might have a different phone number assigned to you each time that you log in (called Hot Seating). If Hot Seating is available in your environment, you must enter the phone number that you are using when you log in.

Important: You may log in only to a single Agent Desktop session at a time. You must log out of one session before logging into a new session.

Important: To log out of Agent Desktop, you must use the **Exit** option from the menu in the upper right-hand corner. You won't be able to log out if you have any active calls or interactions.

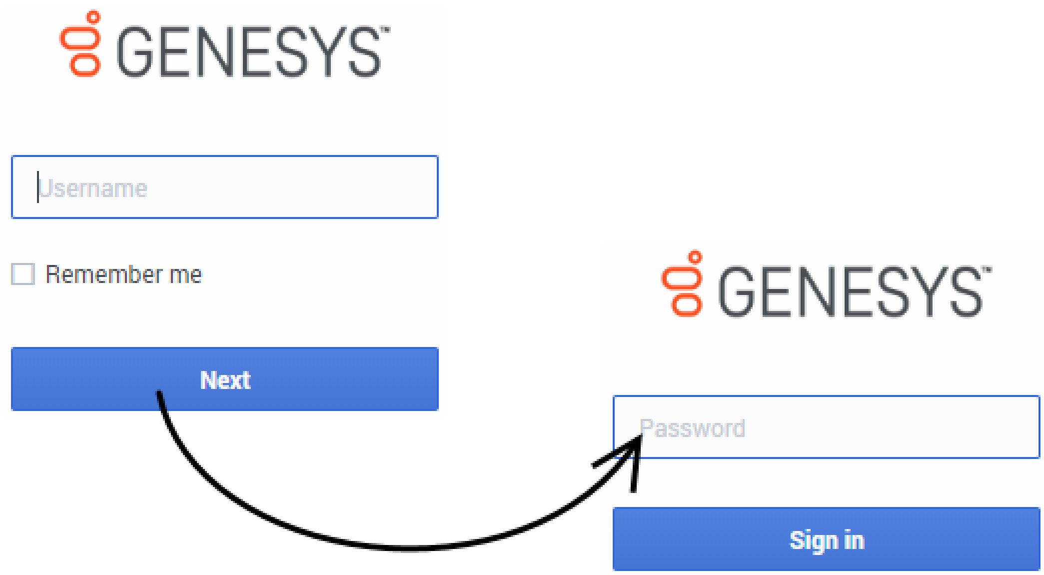
Remote and virtual desktop environments

You might work in an environment that uses Virtual Desktop Infrastructure (VDI, sometimes called VMware) to run Agent Desktop. This means that when you start Agent Desktop, 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 Genesys Softphone 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 Genesys Softphone automatically launches and the Genesys Softphone icon is displayed in your system tray. Until you log in to Agent Desktop, this icon looks like this: . After you launch Agent Desktop and the Genesys Softphone is connected, the Genesys Softphone icon looks like this: .

Log in to Agent Desktop if your company uses OAuth



To start Agent Desktop click its icon in **Genesys Portal**, or open a browser and go to the link for Agent Desktop that your supervisor gave you.

Log in with your username and password.

Tip

- You enter your password on a different login screen.
- Clicking **Change login account** takes you back to the main log in screen.
- Agent Desktop has a security feature that might be set up for your account that logs you out if you stop using Agent Desktop or your computer for a while. Agent Desktop first displays a message to warn you that you are going to be logged out. If Agent Desktop logs you out, just log back in again when you are ready to start using Agent Desktop.

Important

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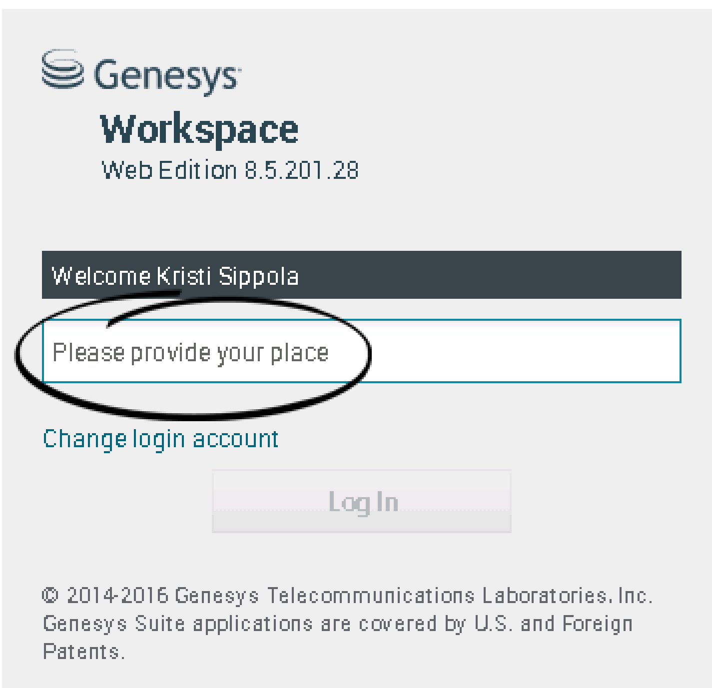
Place



During login, you might see a window that asks you to input your Place.

Your Place is the name or number of the workstation or phone you are using. If you do not know what to enter, ask your supervisor.

If you do not see this window, your account is set up to always log you in on the same Place.

If you move around from Place to Place, you might have to enter a different Place each time that you log in.

Change your status to Ready

Link to video

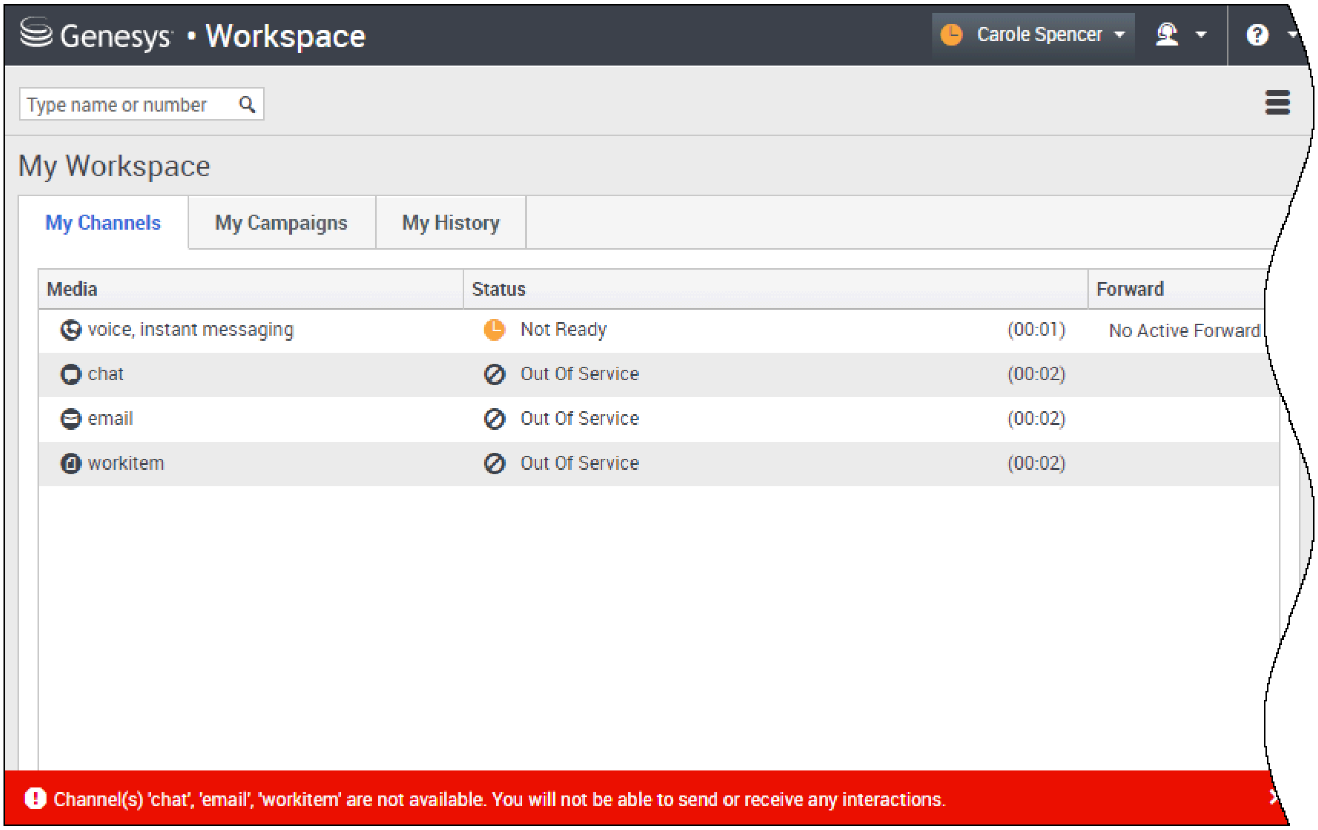
To receive calls, you must be in a **Ready** status (indicated by a green checkmark beside your name).

If you need to change your status, go to **My Channels** and toggle the voice channel to **Ready**.

Tip: You can also change your status for all channels in one easy step. Click your name at the top right-hand corner of the screen and select **Ready**.

Watch the video for a short demonstration of changing your status.

What happens if not all channels are available when I log in?



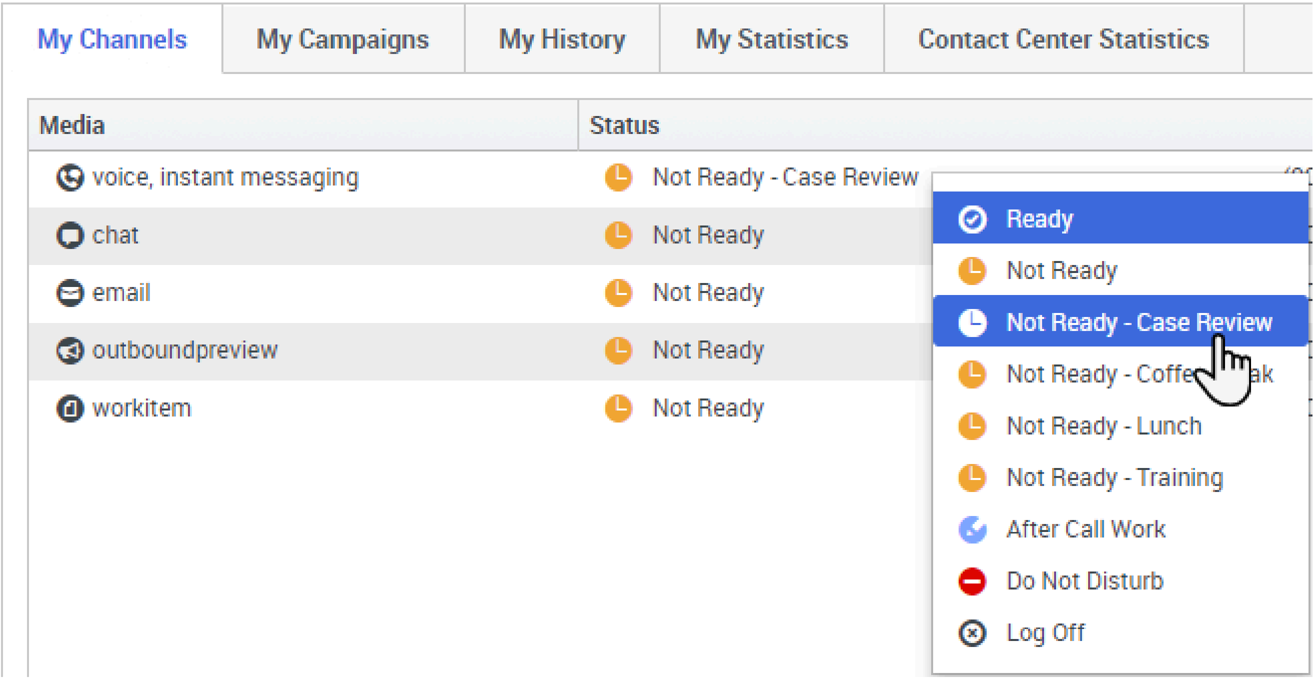
Sometimes when you log in, one or more of the channels that you are assigned might not be available.

You will know that one or more channels are not available because you will see a warning message at the bottom of the Agent Desktop window.

When this happens, you can still log in, but when you look at your My Channels tab, you'll see that one or more channels have the **Out Of Service** status. When a channel is out of service, you cannot log on or off on that channel and you cannot set your status.

When the channel becomes available again, a message will be displayed at the bottom of the Agent Desktop window. You can use the **My Channels** tab to change your status on that channel.

Setting your status to Not Ready with a reason



Sometimes you need to set your status on one or more channels to Not Ready so that you do not receive new interaction on that channel. You can choose to set the status to Not Ready or Not Ready with a reason. Your administrator sets up the Not Ready Reasons that are available to you from the Status drop-down menus.

Tip

If you manually set your status to Not Ready while you are handling a phone call, chat, or email, the system starts recording your time in that state rather than the time spent handling the call. Some contact centers have the Pending state enabled so that the Not Ready state does not take effect until after you end your phone call or chat interaction, or after you send your email or place it in a workbin.

Handle an inbound call

Link to video

Make sure your softphone or phone device is connected and ready.

Need help with your softphone? See How do I use my web phone with Agent Desktop?

When a call arrives, you'll get a pop-up in the bottom right-hand corner of your screen. You might also hear a sound to alert you that a call has arrived.

Click **Accept** to connect the call. If you **Reject** the call, or ignore the pop-up, it goes to the next available agent.

To get you started, here are some common call handling features:

 = Hold

 = Resume

 = Transfer

 = Hang up

 = Mark Done

After the call is complete, you might enter an **After Call Work** state, during which you can complete any tasks related to the call. For example, you could add a Note or select a Disposition code.

Watch the video for a short demonstration of how to handle a voice call.

What do I do next?

You might want to learn more about:

- Media channels
- Handling calls
- Working with contacts
- Using standard responses
- Managing your workbins (which store your work in progress)

Channels (v8)

Channels are the different methods, such as email and chat, that you use to communicate with customers and team members in your contact center.

What does each channel do?

Each channel lets you communicate with your contacts in different ways. You can make and receive phone calls (known as the Voice channel). You can also receive and reply to emails, interactive live chats, Facebook messages, and Tweets on Twitter.

Why can't I see all the channels?

Depending on your assignment, you might have all, some, or just one of the channels available to you.

What's the difference between a consultation and a conference?

Both activities involve getting help from an agent or supervisor. Consultations let you communicate with a team member privately while handling an interaction. Conferences let someone else from your contact center join the chat or phone call with your contact.

If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

What can I do in the My Channels tab?

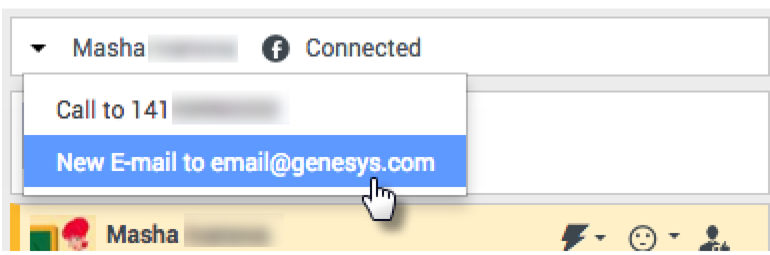
Use the My Channels tab to:

- Change your status on a channel
- Log off from a channel
- Turn on/off your Do Not Disturb status (applies to all channels)
- Forward calls that are directed to your extension to another extension
- Find your extension by hovering your mouse pointer over the name of the voice channel and the tip text displays your extension.

Tip

If you manually set your status to Not Ready while you are handling a phone call, chat, or email the system starts recording your time in that state rather than the time spent handling the call. Some contact centers have the Pending state enabled so that the Not Ready state does not take effect until after you end your phone call or chat interaction, or after you send your email or place it in a workbin.

Can I use more than one channel at a time?



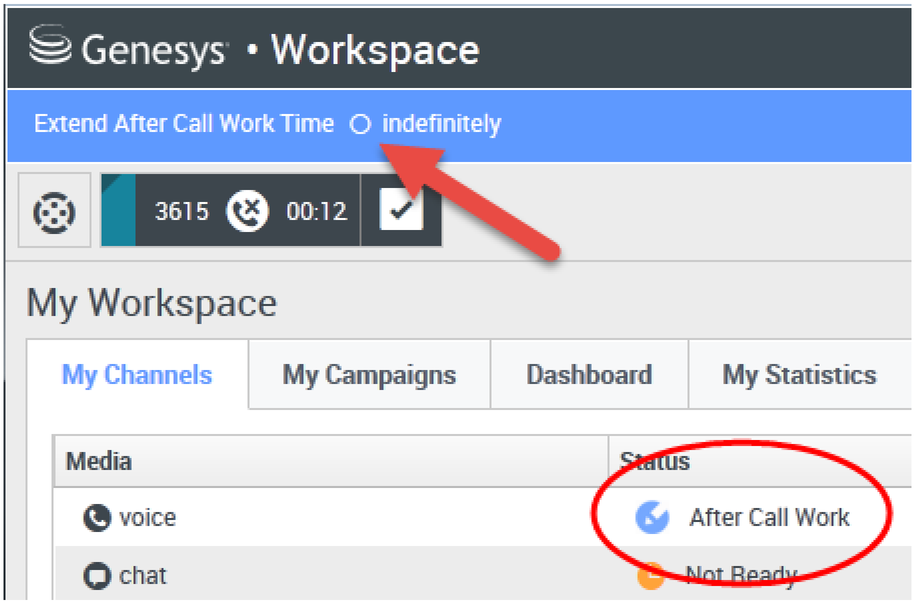
Your environment might be set up to let you use another channel while you are active in a different one. For example, you might want to call a contact while you are handling their email or chat request.

To do this, use the **Party Action** menu in the Interaction Status area to find a list of all phone numbers and email addresses your company has for the contact, and select the one you want to use. If the connection is made, the status area and interaction control buttons are updated to include the new channel.

You might also be set up to handle multiple interactions over different channels simultaneously, such as three emails, two chats and a call with different customers.

If your account is set up for it, you can also click a phone number or email address that your contact sends you as a chat message to call or email the contact.

What happens when I mark an interaction as Done?



The answer depends on your account setup.

You might have to mark an interaction as **Done**  before you can close the interaction view.

When you click **Mark Done**, your status might automatically change from **After Call Work** to **Ready**, **Not Ready**, or some other value, or you might have to manually set your status to **Ready**, or some other value, after you complete your after call work.

You might be allotted a certain amount of time after each call to perform After Call Work (ACW). If so, your status for the voice channel will be **After call work** until the time interval has passed, then it might change to **Ready** or **Not Ready**. You might also be able to extend your after call work time indefinitely, if a call requires more than the usual amount of after call work.

Calls (v8)

Agent Desktop provides you with controls and features that let you handle voice interactions with contacts or team members.

> **Important**
>
> - Some Workspace Agent Desktop features are available only for Genesys Engage cloud users.
> - Some Workspace Agent Desktop features are available only for Genesys Engage on-premises users.

For information about making calls, see the following topics:

- How do I start a call or an email message?
- Outbound campaigns

Related Topics

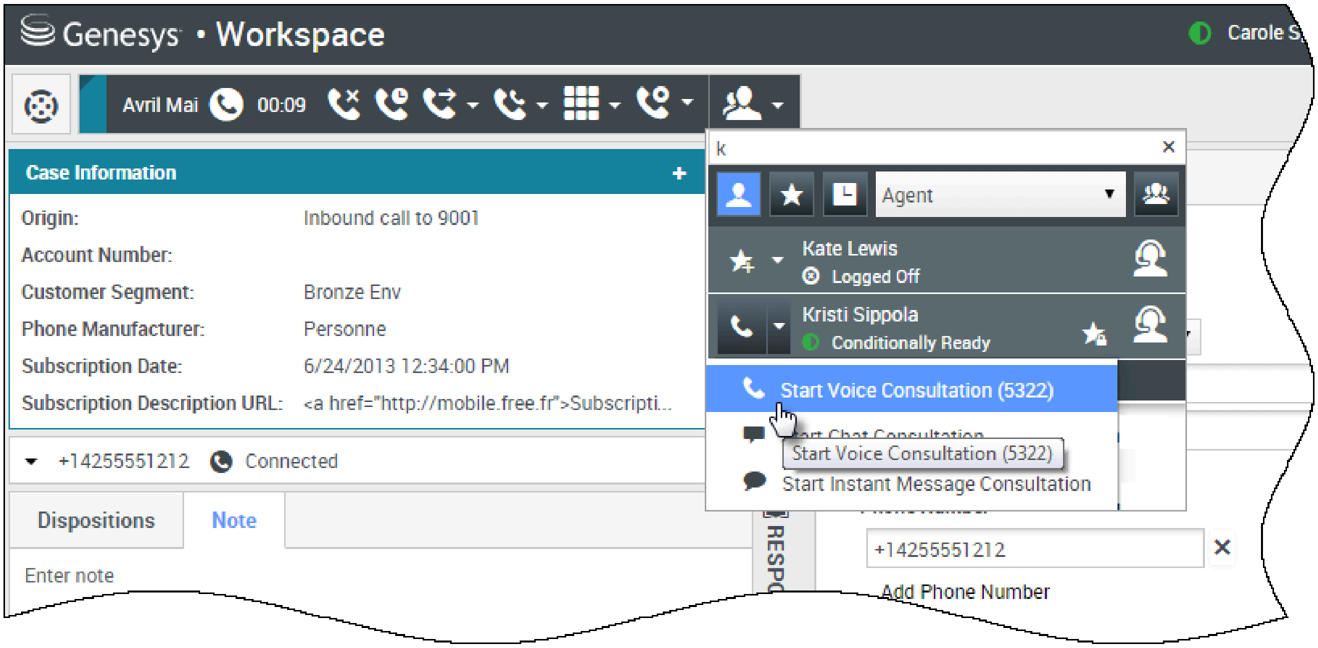
How do I handle an incoming call?

Link to video

- Handle it myself
- Handle it myself with help
- Transfer it
    - Instantly 
    - After a consultation
- End the call 

If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

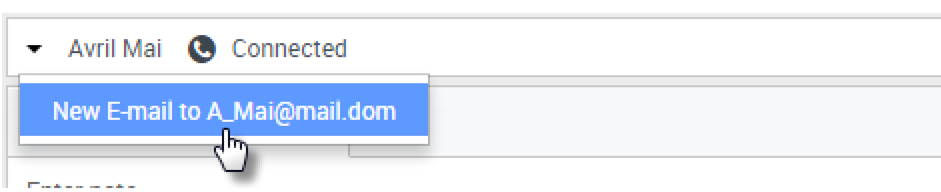
Where can I get help to handle a call?



- Look for standard responses
- Search contact and interaction history
- Start a consultation 
- Start a conference 

If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

What other actions can I take during a call?



- Send an email or make another call
- Update contact information
- Record the call

- Hold  and resume 
- Dial digits  without using your phone. For instance, you can use this dialer when you are navigating a phone system.

How do I control the volume of my headset and mute myself?

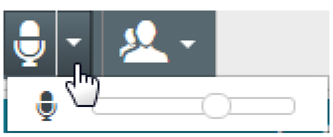
Link to video

Your administrator can set up the controls for your microphone and speakers on your headset to let you mute and unmute yourself and/or your contact, and let you control the volume of your microphone and speakers.

Depending on how things are set up, you might see different configurations of buttons:

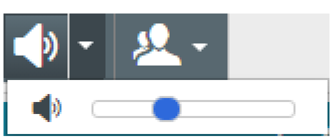
- Mute/unmute your microphone

- Adjust the volume of your microphone

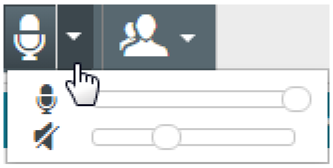


- Mute/unmute your speaker

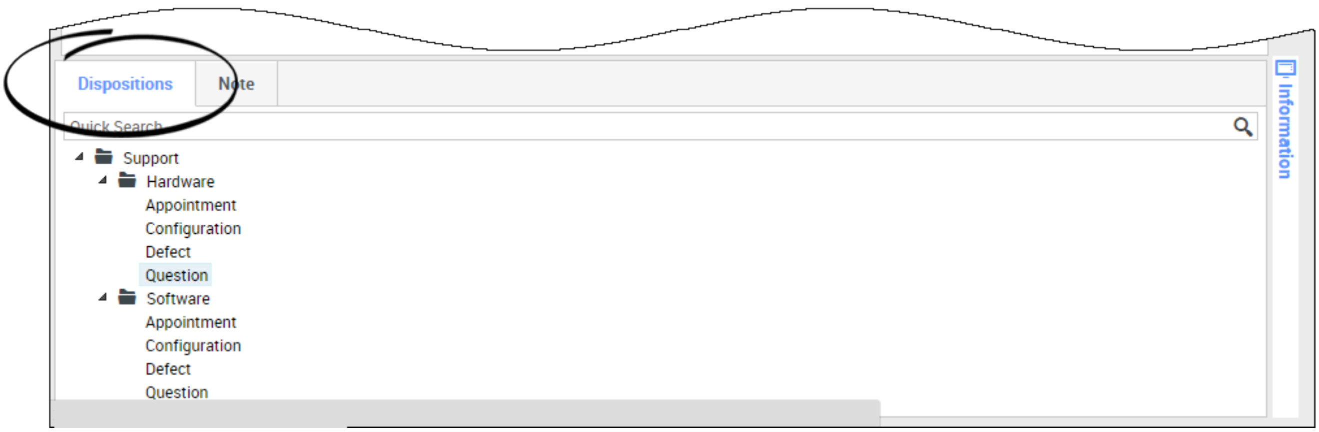
- Adjust the volume of your speaker



- Adjust the volume of both your microphone and your speaker

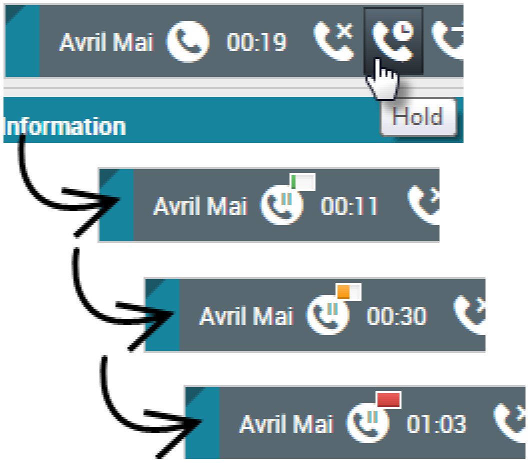


What do I do at the end of a call?



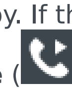
- End call 
- Take notes
- Select a disposition code if required
- Mark Done 
- Change status as needed

What happens when I put someone on hold?

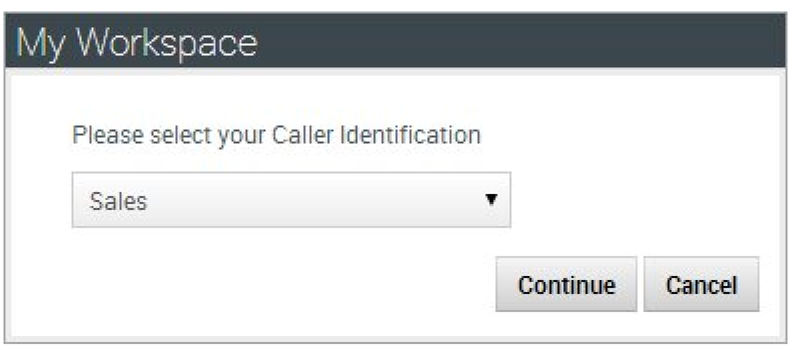


You can see how long you have placed a caller on hold, if enabled.

After you click **Hold** (), a timer and progress bar begin to count the seconds that the call is on hold.

The progress bar changes from green to yellow to red as time goes by. If the progress bar changes to red, the call has been on hold too long and you should click **Resume** () to update the contact and let them know that they are still on the call.

How do I manually select a Caller Identification?



When you make a call, you might have to choose a Caller Identification to be displayed on the phone of the contact. This feature might also be enabled for calls that you are transferring or conferencing.

The person you call sees the Caller ID you select. The previous Caller ID that you selected is selected by default. To hide your identity, you can select `Anonymous` if available. Ask your supervisor about when to use this feature.

How do I record a call?

The Call Recording functionality (for VoIP/SIP enabled agents only) enables you to record the current voice interaction with a contact or an internal target. Agent Desktop supports two different types of call recording: emergency recording and controlled call recording. Your system administrator configures the type of call recording that is supported in your environment.

If your account is set up for emergency recording, you can start and stop recording by using a single toggle button.

If your account is set up for controlled recording, you can start a recording, pause a recording, resume a recording, and end a recording.

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

Call recording enables you to perform the following functions:

- **Record the call** — Select Record the Call () to record a call.
- **Stop recording the call** — Select Stop Recording the Call () to stop recording a call that you are currently recording.
- **Pause recording the call** — Select Pause Recording the Call () to pause recording a call that you are currently recording.
- **Resume recording the call** — Select Resume Recording the Call () to stop recording a call that you are currently recording.

When you are recording a call, the call icon in the connected-parties area changes to red.

When you pause a call recording, the red call icon changes back to gray.

A call-recording icon () is displayed in the title bar of the Main View when a call recording is active.

How do I forward my calls?

Important

Call forwarding might not be available in your environment.

To forward calls to a different extension or phone number, on the selected media channel, in the Forward column, click No Active Forward and **Forward**.

This action opens the Forward dialog box. Enter the number to which you want to forward your calls and click **Apply**. Click **Cancel** to return to the My Channels tab without forwarding your calls.

If you have an Active Forward set and you want to disable it, on the voice channel, in the Forward column, select **Forwarded to <number>**, and select **Cancel Forward to <number>**.

In the Cancel Forward dialog box, select **Yes** to cancel the forward; this removes the active forward and changes the Forward status to **No Active Forward**. To keep the forward active, select **No**.

Important

When an Active Forward is set, no call is received by the application.

How do I call someone back?

If you are handling a call and the call drops you can call the contact back either by opening Team Communicator, filtering for Recent Calls ( ), and selecting their name, or by opening the **Party Action** menu and selecting the contact's phone number from the pop-up menu.

Email (v8)

The email interaction window enables you to view all of the information necessary to handle inbound and outbound email interactions with a contact.

Related Topics

How do I handle an inbound email?

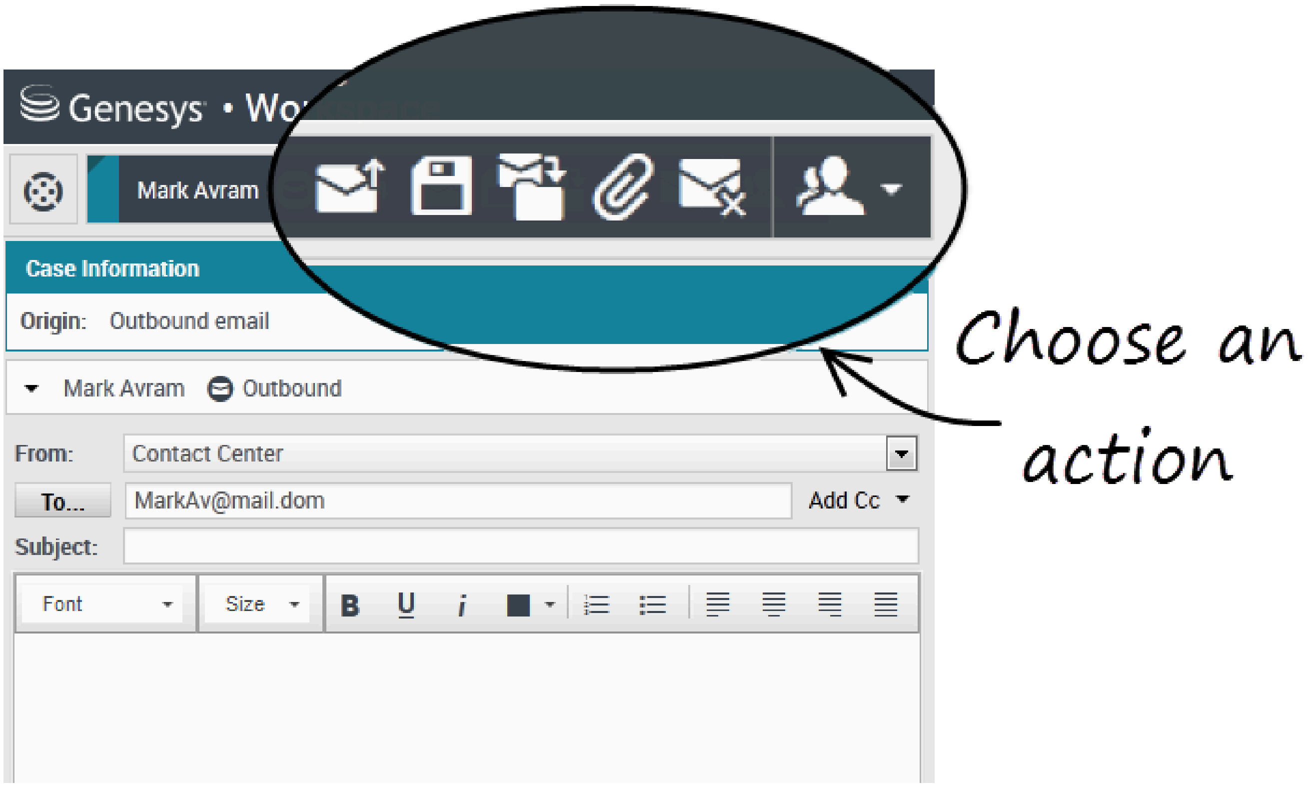
Link to video

Typical actions you can take with an email are:

-  to reply to the email, using your own message or a standard response.
-  to reply all.
-  to transfer the email to another agent.
-  to forward the email to an external resource.
-  to save it in your workbin.
- View the associated case data.
- Add a note or disposition code.
- Mark it as done.

Watch the video to see what happens when an email arrives at a workstation.

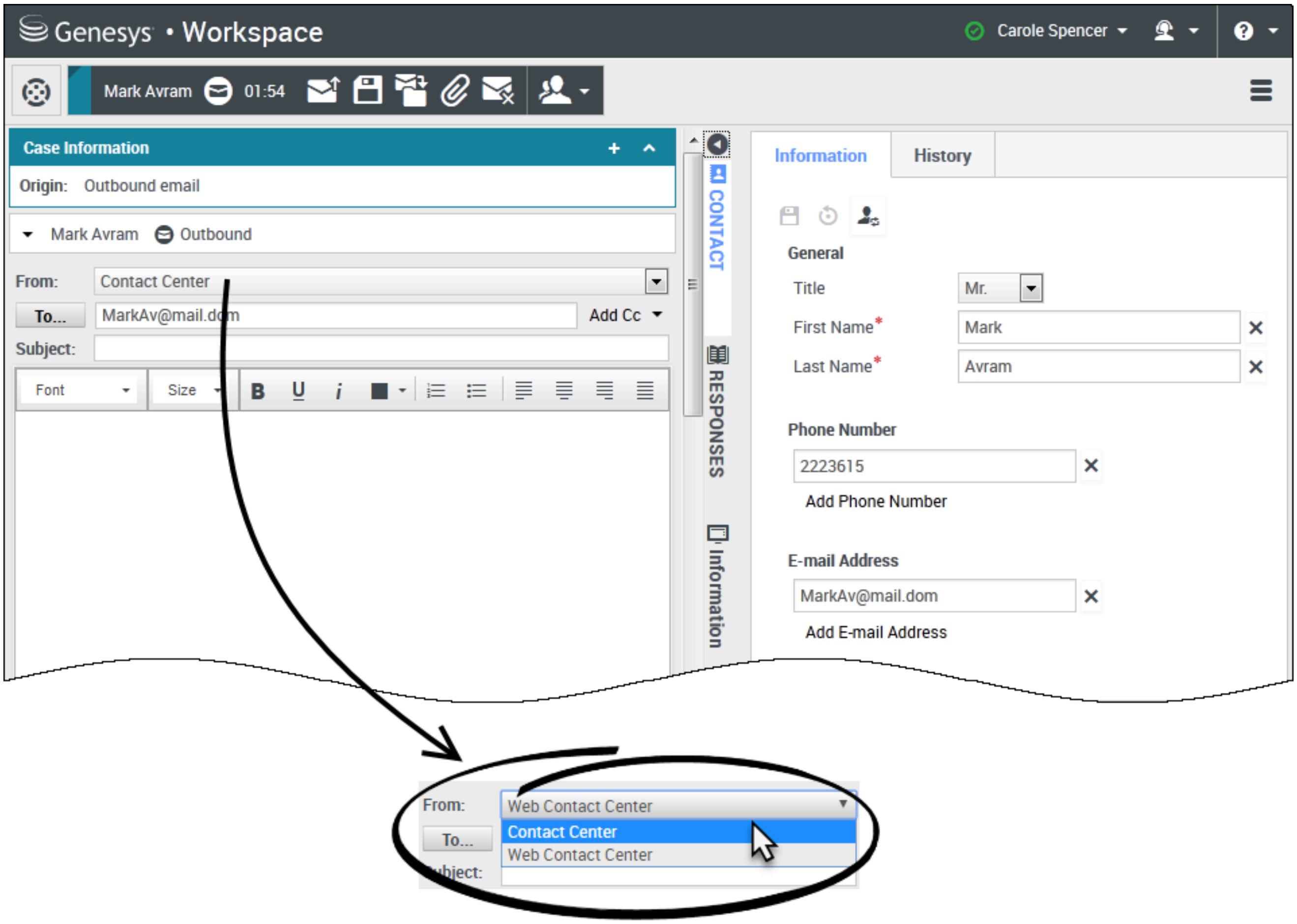
How can I get help with an email?



- Check the associated case data for information that might help you.
- Call the contact, if your site has this feature and their number is available in your contacts list.
-  to start a consultation with a team member. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.
-  to forward the email to an external third-party resource for additional support or help.

If you are sending the email to someone else, you can add your own notes or instructions for that person to review.

How do I compose and send an email?



There are three main ways to compose and send an email in Agent Desktop:

- Reply to an active interaction.
- Find a contact (using your internal team or contacts directory) and select the email option from their contact details.
- During a call, click the party action menu and select **New E-Mail to...**.

While the outbound email window is open, you can compose a message, add any required notes, dispositions, attachments, and recipients, and then send the email.

Use the **From** drop-down to choose a different 'from' email address. Your administrator sets the 'from' default address.

If you are not yet ready to send it, you can save it as a draft in your workbin, or delete it.

Forwarding an email as an attachment to an external resource

Link to video

To send a copy of an email interaction as an attachment to an external resource (someone in your company directory that is outside of the control of the Genesys environment — for example, your back office). A forwarded inbound email is copied as an attachment to a new email interaction from you. You are still responsible for responding to the original inbound email interaction. You might or might not be required to wait for an answer to this forward, depending upon your corporate policies and processes.

To forward the email, click **Forward** () on the active inbound email window toolbar. This feature is available only for current email interactions.

To add a target to the **To** address field, do one of two things:

- Type an email address in the address field. Click **Add Email Address** to enter the email address of the target in the address field. If your environment is set up to let you add multiple addresses, you can click in the address field and enter additional email addresses.
- Click the **To...** button beside the **To** address field to display the Contact Search view. You can use this view to perform a search of the Contact Directory for targets. The Contact Search view can also be used to add **Cc** targets (if Cc is available in your environment).

To display the **Cc** address field, 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.

To add a comment, information, or instructions to the forwarded email interaction for the target, enter your message in the **Enter Forward Instructions** area, above the original email that you are forwarding.

To send the forwarded inbound email to the targets, click () **Complete Forward**.

When you forward an email, it is temporarily stored in your In-Progress workbin until the forward is completed, then it is removed from the workbin.

Forwarding an email inline to an external resource

Link to video

To send a commented copy of an email interaction to an external resource (someone in your company directory that is outside of the control of the Genesys environment — for example, your back office). This is called inline forwarding. A forwarded inbound email is copied into a new email interaction. The new email has a note with the date and contact name or the header of the email that you are forwarding and below that, the contents of the original email quoted. You are still responsible for responding to the original inbound email interaction. You might or might not be required to wait for an answer to this forward, depending upon your corporate policies and processes.

To forward the email, click **Forward** () on the active inbound email window toolbar. Usually this feature is available only for current email interactions; however, some contact centers might give you the ability to forward email interactions from the Interaction History that have already been closed.

To add a target to the **To** address field, do one of two things:

- Type an email address in the address field. Click **Add Email Address** to enter the email address of the target in the address field. If your environment is set up to let you add multiple addresses, you can click in the address field and enter additional email addresses.
- Click the **To...** button beside the **To** address field to display the Contact Search view. You can use this view to perform a search of the Contact Directory for targets. The Contact Search view can also be used to add **Cc** targets (if Cc is available in your environment).

To display the **Cc** address field, 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.

To add a comment, information, or instructions to the forwarded email interaction for the target, enter your message above the original email that you are forwarding.

To send the forwarded inbound email to the targets, click () **Complete Forward**.

When you forward an email, it is temporarily stored in your In-Progress workbin until the forward is completed, then it is removed from the workbin.

Forwarding from History

You can inline forward from the Interaction History. In the following windows, select an interaction and click :

- **Interaction History**
- **Contact History**
- **My History**

Forwarding either inline or as an attachment

Link to video

Some contact centers are set up to enable you to choose whether you want to forward an inbound email in-line or as an attachment. If this feature is enabled for you, the Forward button has a drop down menu that lets you choose how you want to forward an email.

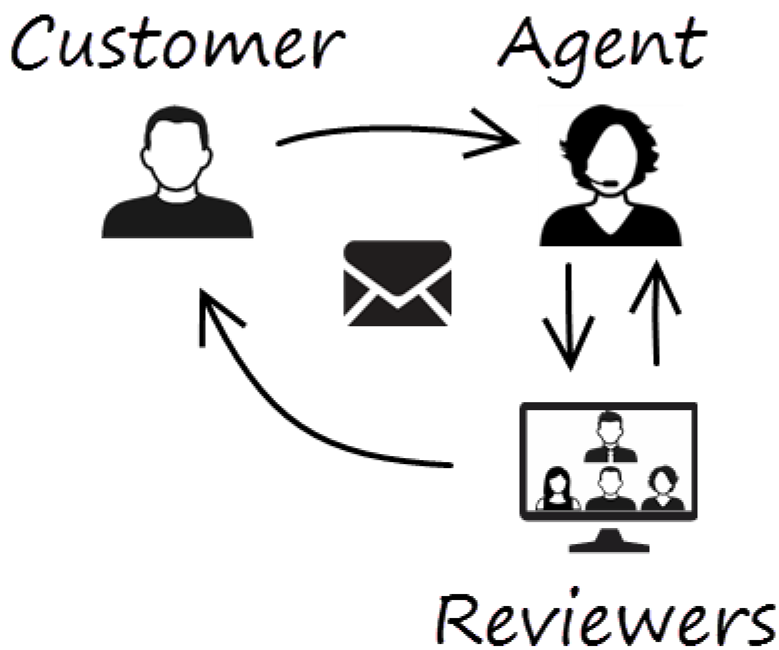
Click **Forward** to open the menu.

Choose one of the following options:

- Forward
- Forward as an Attachment

Follow the steps in the sections above, depending on which way you are forwarding your email.

How does email quality assurance work?



Agent Desktop lets you and your team lead or supervisor work together to perform a Quality Assurance (QA) review of outbound emails. If your contact center is set up for email QA, any emails that you send are first sent to a reviewer for approval.

Here's an example of how a typical email QA review cycle might work:

- A customer sends an email to an agent.
- The agent sends a reply, which is directed to a reviewer.
- The reviewer either approves the email (sends it to the customer) or rejects it (holds it back for changes). The reviewer might make the updates themselves, or send it back to the agent with notes or instructions. The Case Information for the interaction might also show a **Rejected** status.
- After the changes are made, the review process repeats.

(Ask your administrator about the QA review process in your contact center as it might differ from the one described here.)

Chat (v8)

The chat channel lets you handle customer chats.

This page describes the typical options for handling a chat interaction. During a chat session, you and your contact send messages back and forth in real-time. When your contact is typing, you will see a notice that they are writing a response, but you won't see what they have written until they send it. The Interaction View keeps track of the conversation and allows you to review what has been said.

Related Topics

How do I handle a chat interaction?

Link to video

When you accept a chat request, the name of the contact is displayed at the top of the screen and the timer for the pending response indicator starts. The color of the indicator begins as green, then changes to yellow if you have not responded within the specified time limit. If you still do not respond, the indicator changes to red and begins to flash.

Some of the things you can do while handling a chat include:

- Transfer ( ) the chat to someone else in your company.
- Start a chat conference ( ) with yourself, the customer, and someone else in your company.
- Start a Voice (internal targets and contacts) or Chat (an internal target only) consultation. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.
- Call or email the contact, if there is a phone number or email address in the contact database. (You can also launch a call or email from the Party Action menu by clicking an email address or phone number.) If your account is set up for it, you can also click on a phone number or email address that your contact sends you as a chat message to call or email the contact.
- Add a disposition code or note.
- End the chat ( ) and mark it as done ( ).

If you place your mouse pointer over the interaction in the Interaction Bar, you can see the elapsed time of the interaction and the last lines of the chat transcript. Connection-status information is displayed next to the Party Action menu.

Note: If you have a pending response and the Chat Interaction window is not the active window, it will start flashing in the Windows taskbar, regardless of the pending-response indicator status (green, yellow, or red).

Watch the video to see what happens when a chat request arrives at a workstation.

Facebook (v8)

The Facebook channel enables you to handle interactions with contacts and team members on the popular social networking service.

Related Topics

Businesses use Facebook to reach their target customers, choosing 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.

Important

- Some Workspace Agent Desktop features are not available in all environments. You might not have this channel available in your environment. Check with your system administrator if you are assigned this channel but do not see it in the **My Channels** tab.
- You cannot attach files or pictures to your comments.

How do I handle a Facebook interaction?

When a new inbound Facebook interaction is sent to your workstation, a preview of the interaction is displayed at the bottom right-hand corner of your desktop.

If you accept the interaction, the inbound Facebook interaction view is displayed with the original-routed post on the left margin under the Facebook interaction toolbar. Subsequent comments are indented underneath the original post.

To view your Facebook contact information, select **Show Info** to open a user profile tab or select the username to open the Facebook page with user profile information.

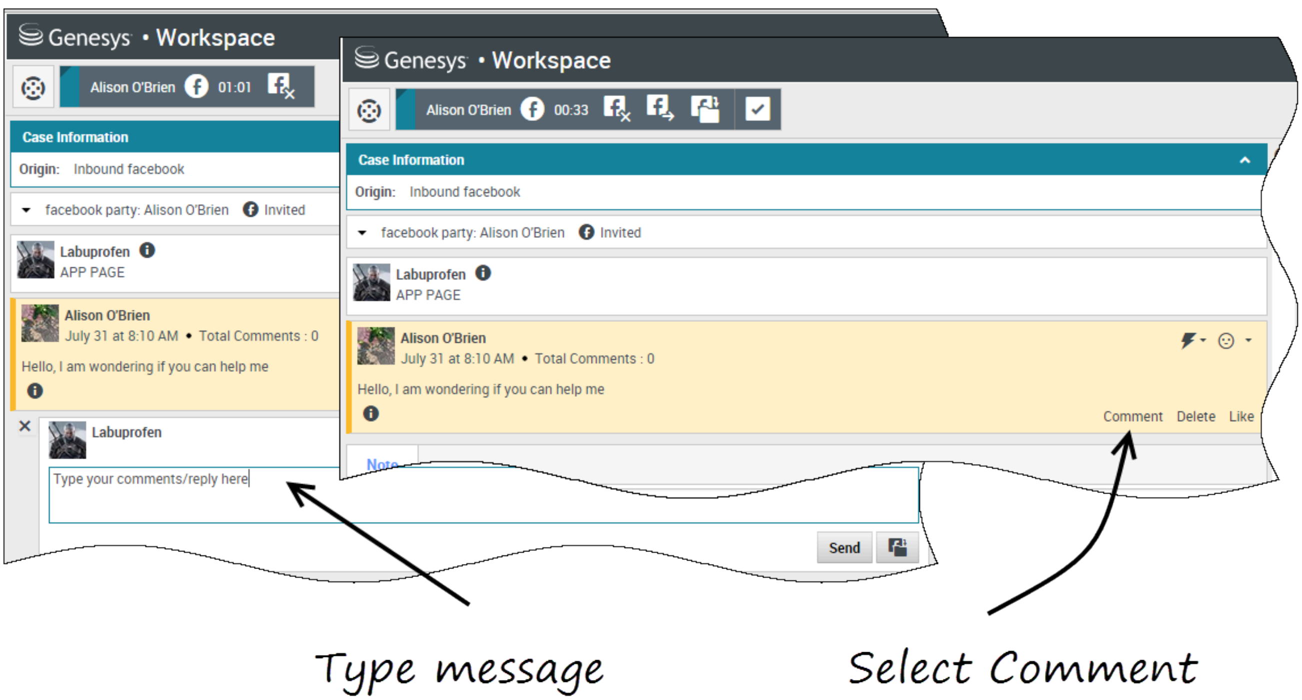
To reply to an original post, click **Comment** on the right of the post. Your comment is attached with the post and sent to your Facebook contact.

Some of the things you can do while handling a Facebook interaction include:

- Transfer the interaction to someone else in your company.

- Start a chat conference with yourself, the customer, and someone else in your company.
- Start a voice (internal targets and contacts) or chat (an internal target only) consultation. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.
- Call or email the contact, if there is a phone number or email address in the contact database. (You can also launch a call or email from the chat transcript area by clicking an email address or phone number.)
- Respond with another media channel, such as voice or email.
- Reply with a Standard Response.
- Add a disposition code or note.
- End the interaction and mark it as done.

What actions can you take while viewing comments

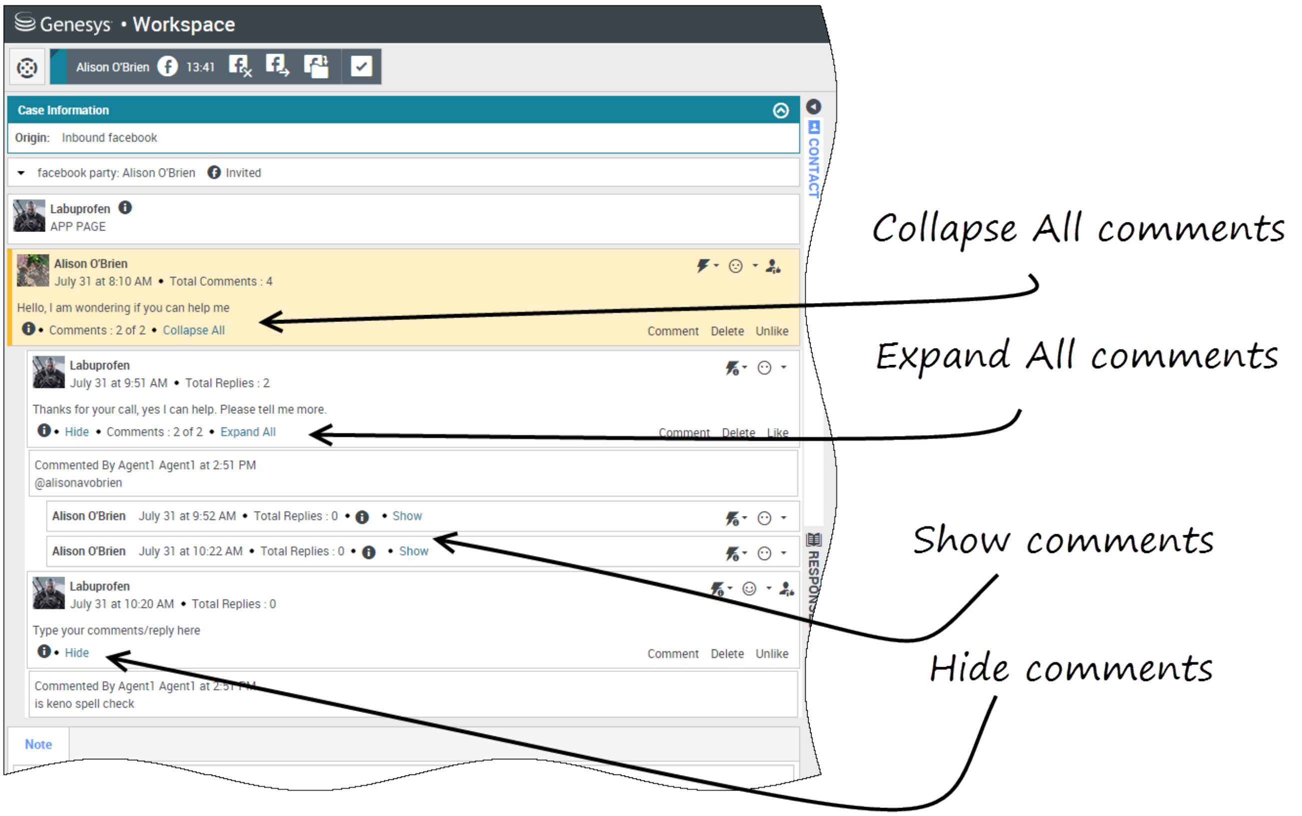


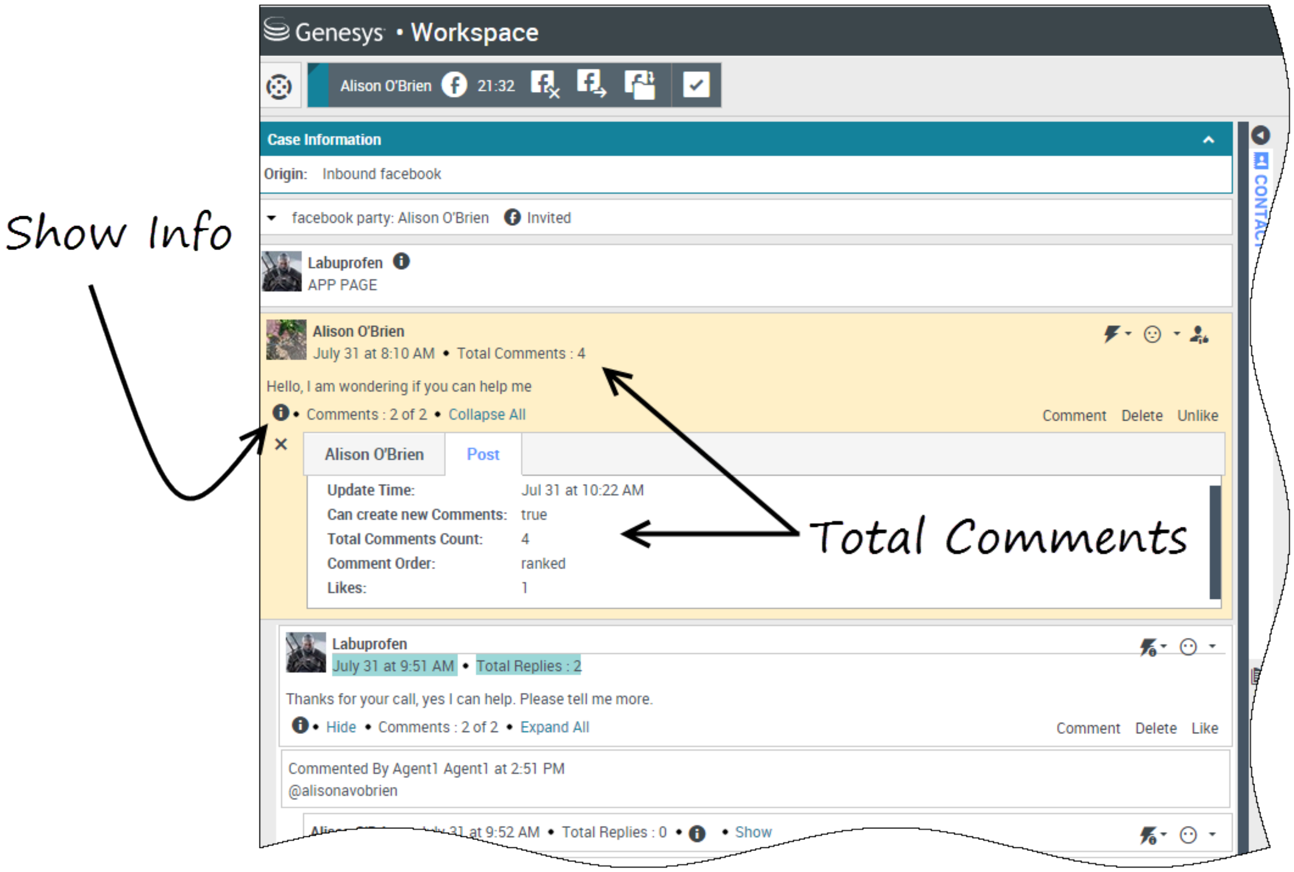
You can reply to your Facebook contact. Select "Comment" and type your message in the text box.

You can also select **View**, **Hide**, **Expand All**, or **Collapse All** to manage the appearance of the comments.

Select the **Show Info** button to open the user profile then select the **Post** tab to view the total comments count. Total comments also appears above the original post. Your administrator sets up the number of comments to display per page. If the number of comments exceeds the set number, **Show more** appears. Click **Show more** to view additional comments.

[+] Show more screenshots.




Genesys • Workspace
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Case Information
Origin: Inbound facebook
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Labuprofen
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July 31 at 8:10 AM • Total Comments : 4
Hello, I am wondering if you can help me
• Comments : 2 of 2 • Collapse All
Comment Delete Unlike
Alison O'Brien Post
Update Time: Jul 31 at 10:22 AM
Can create new Comments: true
Total Comments Count: 4
Comment Order: ranked
Likes: 1
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July 31 at 9:51 AM • Total Replies : 2
Thanks for your call, yes I can help. Please tell me more.
• Hide • Comments : 2 of 2 • Expand All
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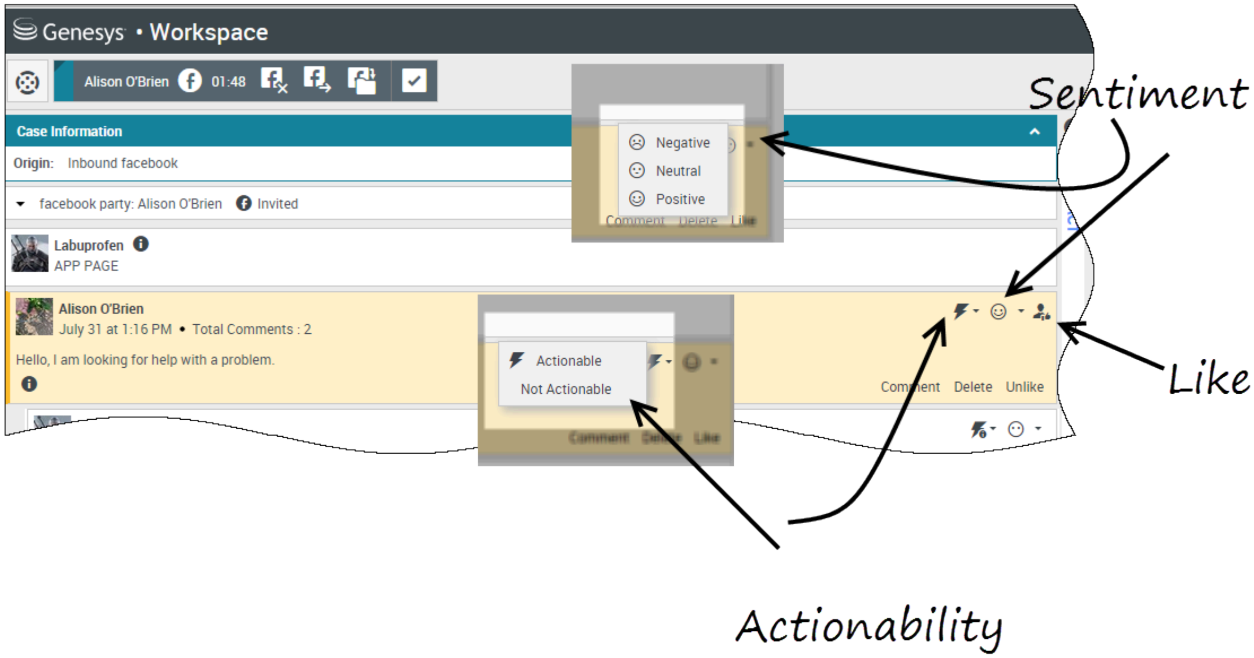
Display the actionability and sentiment



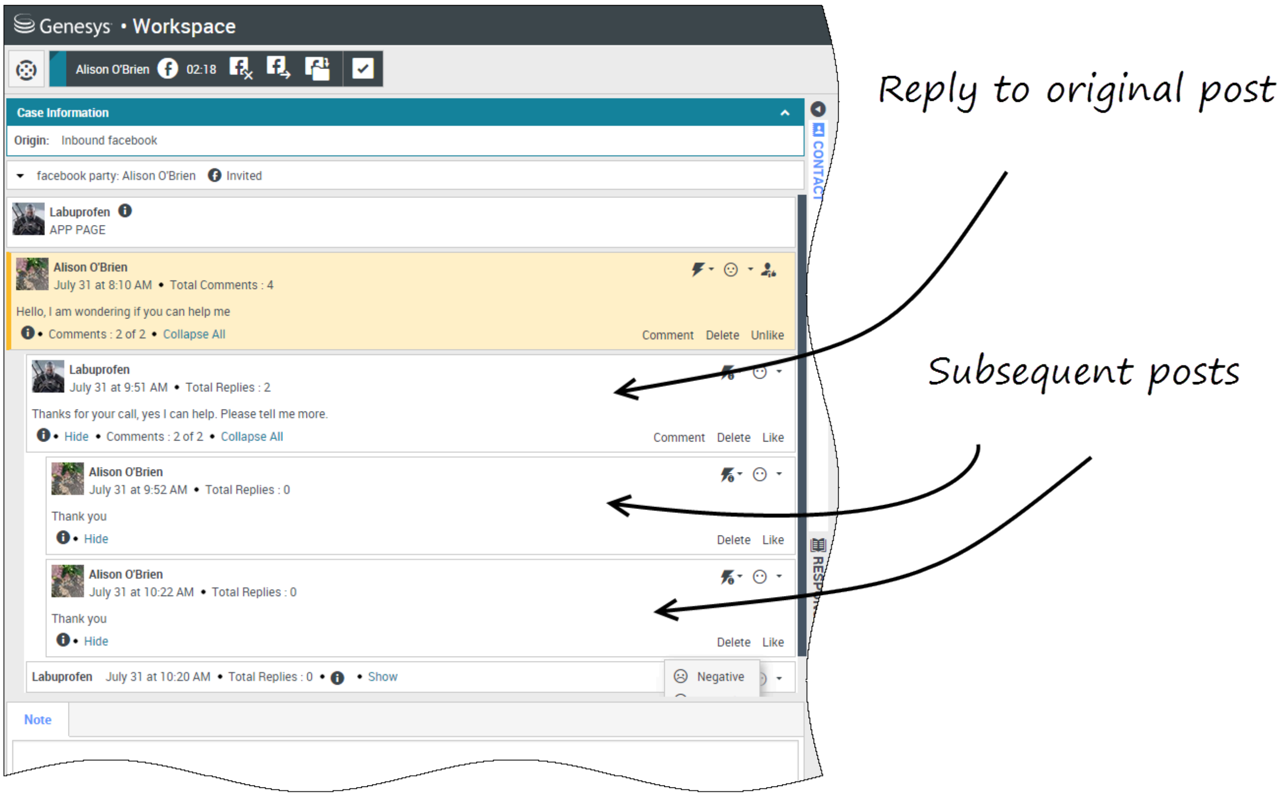
When a Facebook interaction arrives, you can see **Actionability** and **Sentiment** icons, which could have one of the following values:

- **Actionability** — Can be actionable, not actionable, or undeclared
- **Sentiment** — Can be Positive, Negative, Neutral or undeclared

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. You can update each Facebook comment's **Actionability** and **Sentiment** icon.

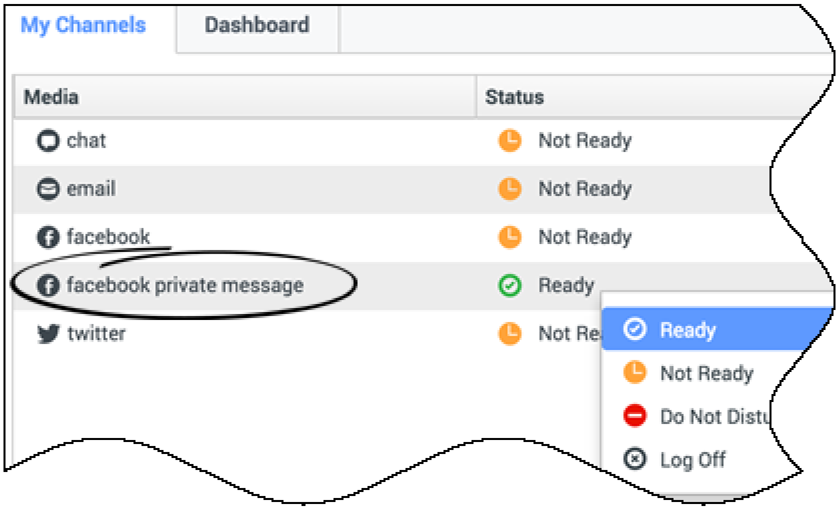
If you favor an interaction, select **Like**.

Reply to comments



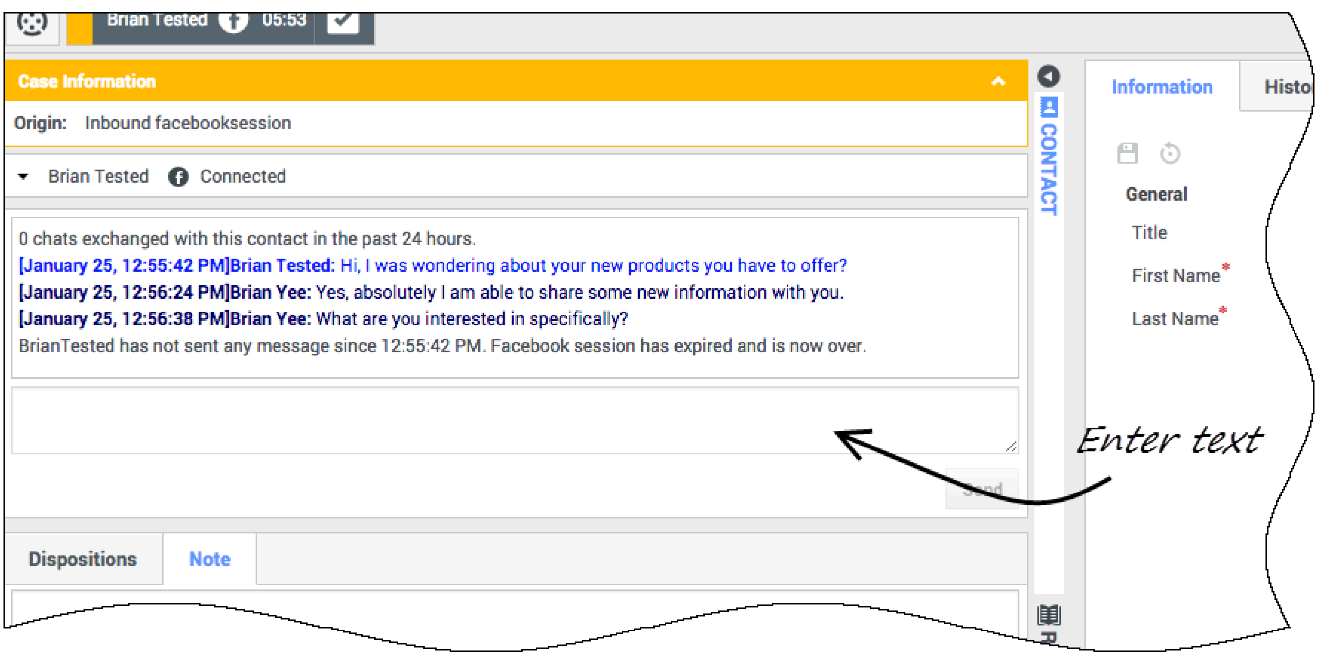
You can reply to the original routed Facebook post, or reply to a Facebook comment. The subsequent comments are indented underneath the original post. Select the applicable comment, enter your reply (you can cut and paste text), and select **Send**.

Reply to a private message: log in



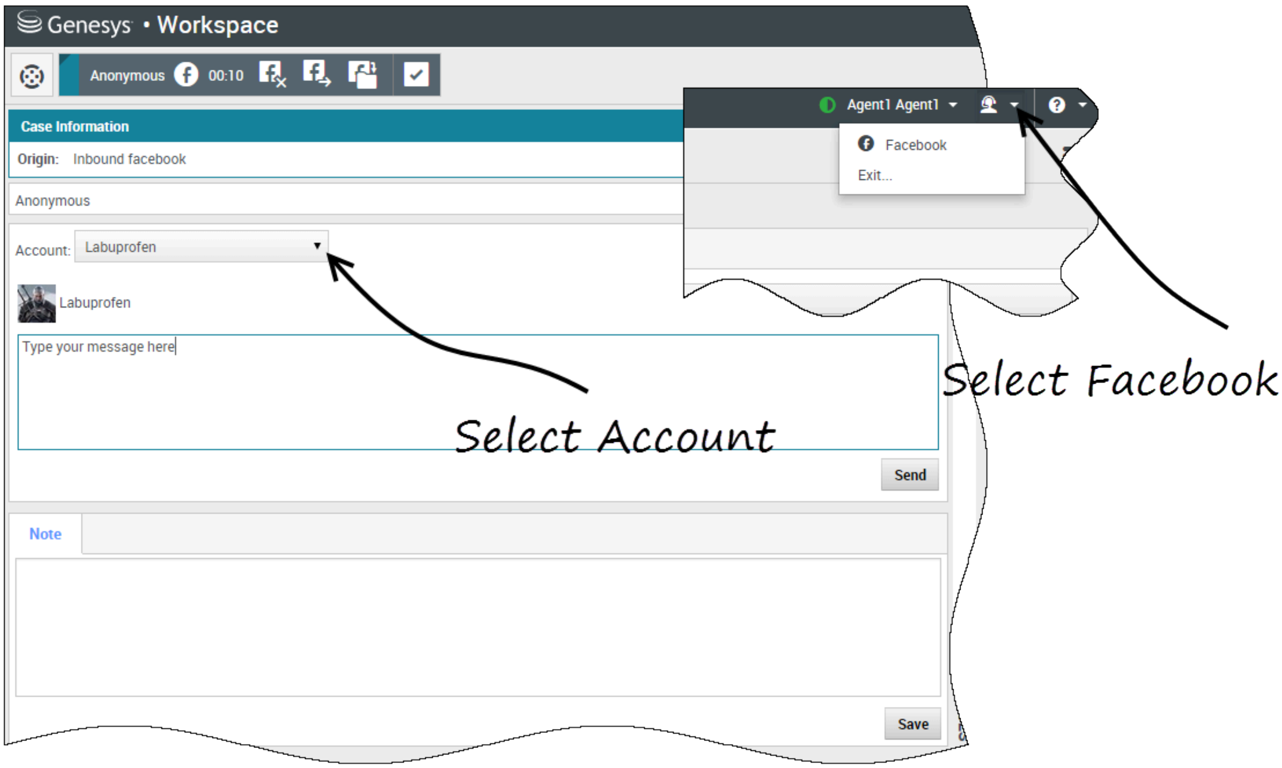
You can reply to a private message from a Facebook contact (you cannot send new private messages). To do so you must log in to a special channel called **facebook private message**.

Reply to a private message: enter your reply



Once you've logged in to the **facebook private message** channel, you can accept private message interactions and reply to them in a way very similar to the way you conduct chat interactions.

Post to Facebook



You can post to your Facebook contact's page. From the drop-down menu beside the **Agent** icon, select **Facebook**. Select the account to which you want to send the post. Type your message and send it to your contact.

Twitter (v8)

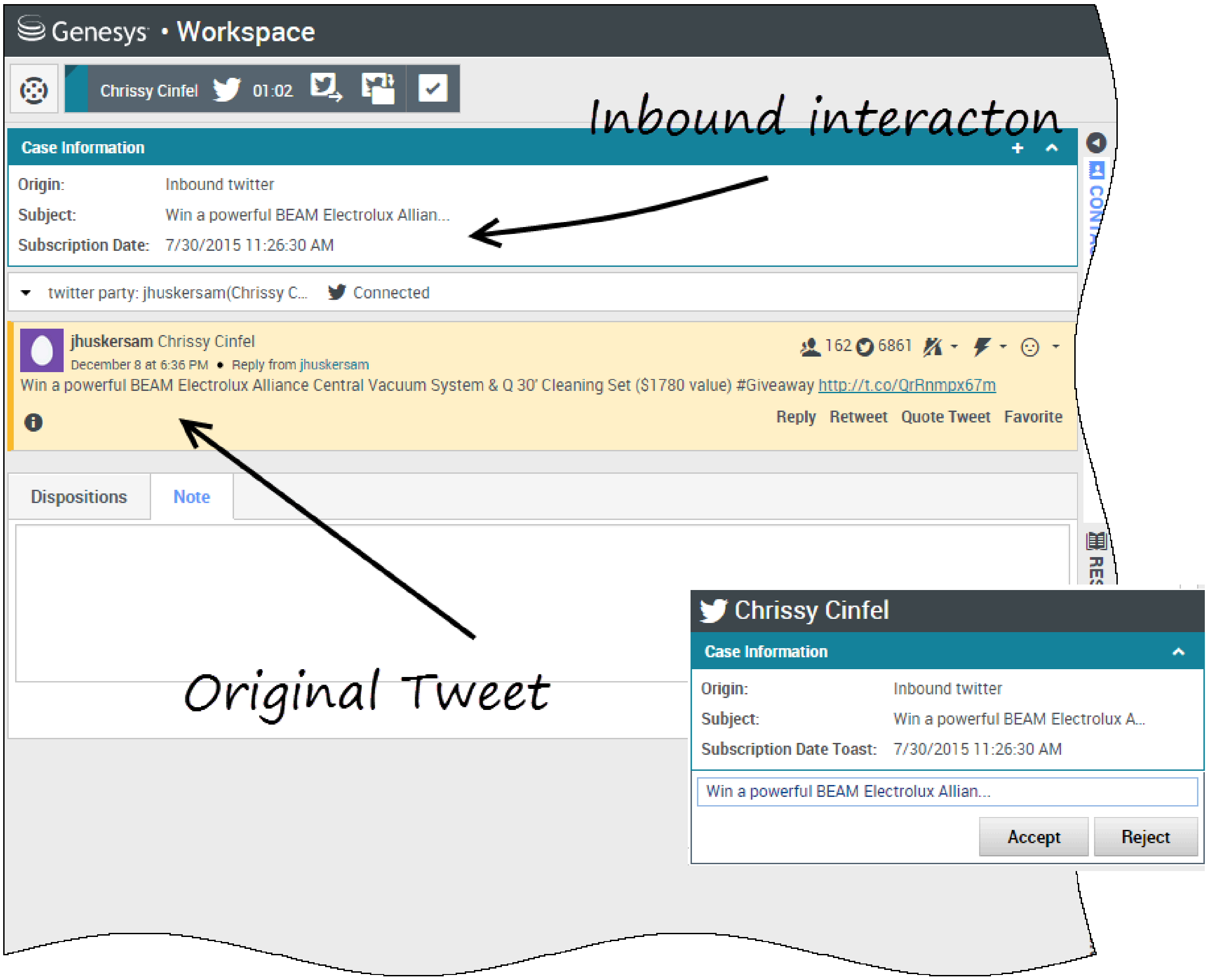
Twitter, a popular online social networking and micro-blogging service, lets you send and read text-based messages called Tweets. These messages are posted to a person's or a company's Twitter feed, sent to their followers, and are found on Twitter by searching.

Related Topics

Important

- Some Workspace Agent Desktop features are not available in all environments. You might not have this channel available in your environment. Check with your system administrator if you are assigned this channel but do not see it in the **My Channels** tab.
- You cannot attach files or pictures to your comments.

How do I handle a Twitter interaction?



When a new inbound Twitter interaction is sent to your workstation, a preview of the interaction is displayed in the bottom right-hand corner of your desktop.

If you accept, the inbound Twitter interaction view is displayed and the original-routed Tweet appears in the left margin under the Twitter interaction toolbar.

Select **Reply**, or select the down arrow after **Reply**.

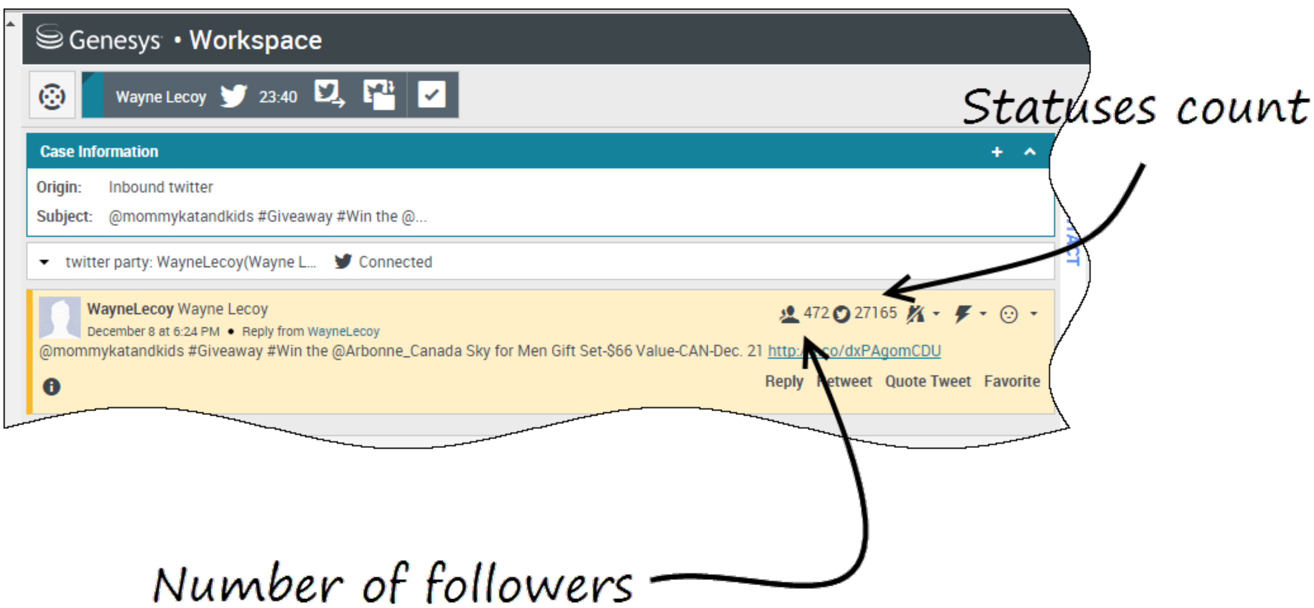
Your message is displayed to the contact on Twitter. Your message is also added to the transcript area of the Twitter interaction view.

To view your Twitter contact's profile information, select the **Show Info** icon or click the username to open the Twitter page that contains the user's profile information.

Some of the things you can do while handling a Twitter interaction include:

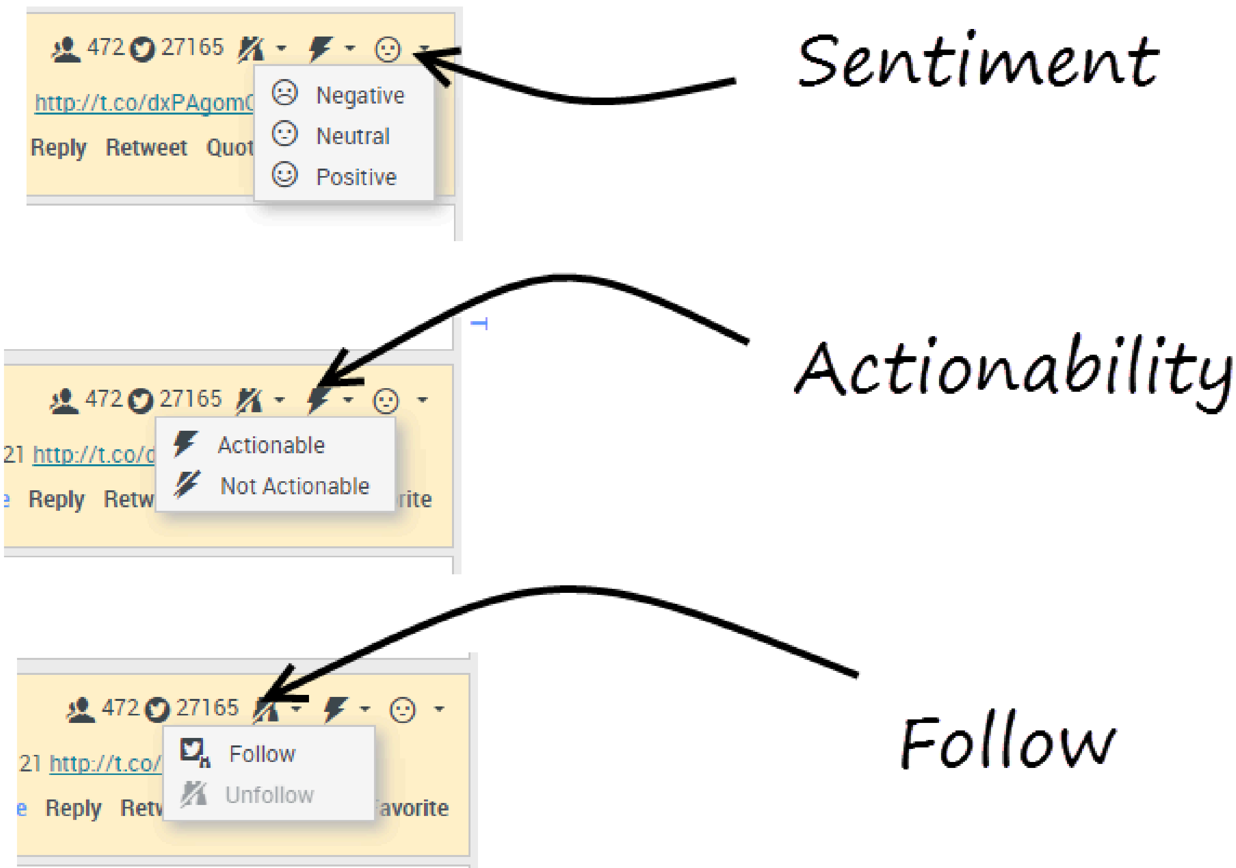
- Transfer the interaction to someone else in your company.
- Start a chat conference with yourself, the customer, and someone else in your company.
- Start a voice (internal targets and contacts) or chat (an internal target only) consultation. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.
- Call or email the contact, if there is a phone number or email address in the contact database. (You can also launch a call or email from the chat transcript area by clicking an email address or phone number.)
- Respond with another media channel, such as voice or email.
- Reply with a Standard Response.
- Add a disposition code or note.
- End the interaction and mark it as done.

Display the number of your Twitter contact's Tweets and followers



The number after the **Statuses Count** icon indicates the number of user Tweets. You can also see how many followers the user has.

Display the actionability and sentiment

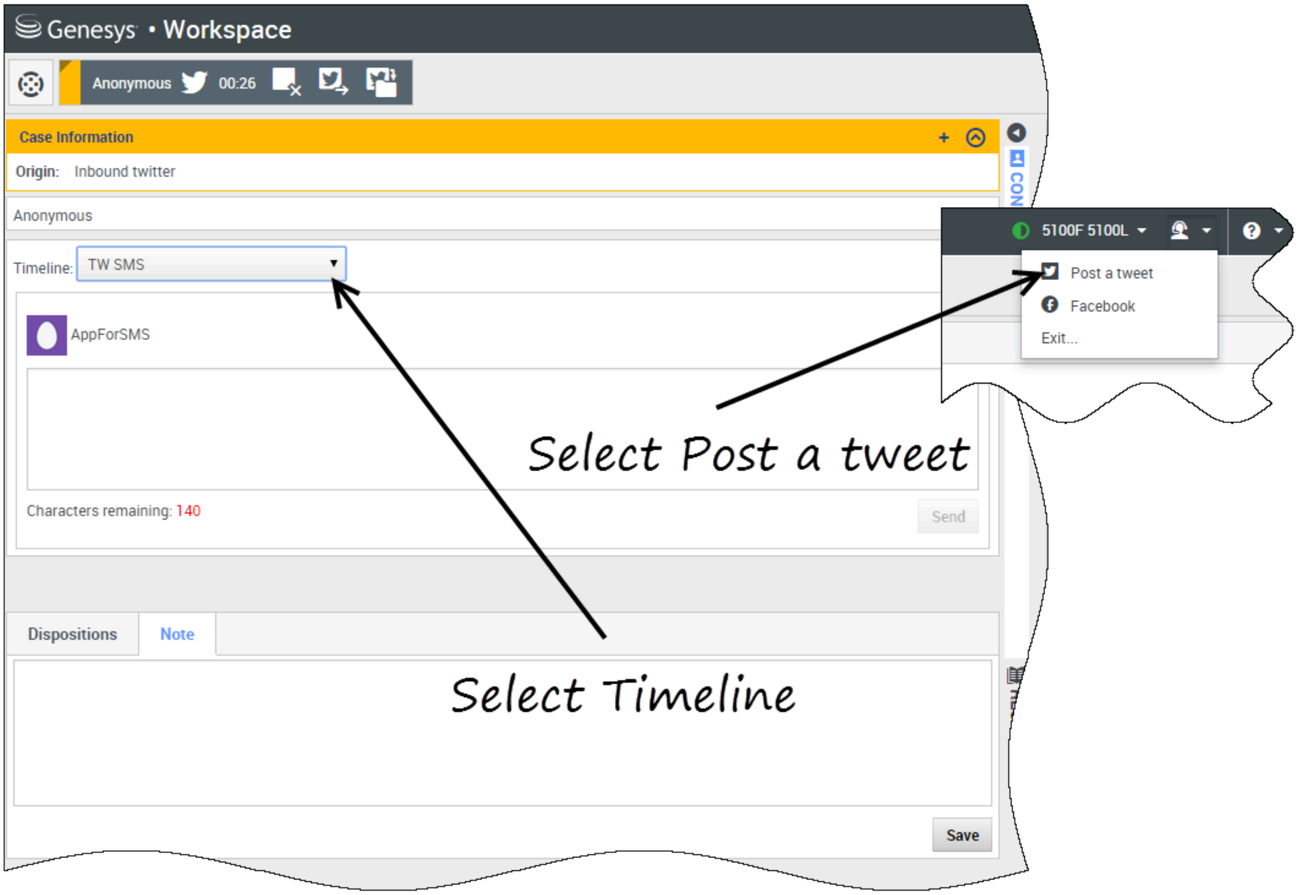


When a Twitter interaction arrives, you can view **Actionability** and **Sentiment** icons, which could have one of the following values:

- **Actionability** — Can be actionable, not actionable, or undeclared.
- **Sentiment** — Can be Positive, Negative, Neutral, or undeclared.

You can become or stop being a follower of an author of the Twitter message. Select the **Followed** button to unfollow the selected account.

Post to Twitter



You can post a tweet to your Twitter contact's page. From the drop-down menu beside the **Agent** icon, select **Post a tweet**. Select the Timeline you want to post the tweet on. Type your message and send it to your contact.

Customer interactions (v8)

A customer interaction has two parts: the actual communication with the customer over one or more channels, and the tools that help you address the customer's issue.

> **Important**
> What you see in Agent Desktop depends on your contact center and your role within it, so you might not be able to do or see all the things covered in this help. If you think you should be able to do or see something you can't, check with your supervisor or system administrator.

What kinds of customer interactions can I receive?

Depending on your assignment, you might receive interactions through almost any channel, directly from customers or by way of a consultation, conference, or transfer. Some contact centers are set up to always direct interactions from the same customers to the same agents. If your assignment is set up this way, then you will be able to assist certain customers whenever they call, email, chat, and so on.

What kinds of customer interactions can I start?

Depending on your assignment, you can:

- call a customer directly
- make outbound calls as part of a campaign
- send an email
- send Tweets or post to Facebook, though more likely your social media interactions will begin with customers

Only customers can initiate chat sessions.

Can I use more than one channel at a time?

In some cases, you can use multiple channels during a single customer interaction. You can, for instance, send an email to customer you are speaking with.

Where can I find answers to common questions or problems?

First, try standard responses, your own contact history, and any customized knowledge repositories your contact center uses. If none of those options works, you can start a consultation with one of your team members.

How do I search through my previous interactions with customers?

You can view customer interactions in three ways:

- My History lets you browse your interactions
- The Contact Directory lets you browse all interactions with a customer or team member
- Interaction Search lets you browse the complete interaction database using either a Quick Search or an Advanced Search

How do I accept an incoming interaction?

New interactions (calls, chats, emails, or social media postings) arrive at your workstation in a pop-up, which lets you decide whether to accept or reject the interaction. If you take no action at all, it will eventually time out and go to the next available agent.

If you're configured for auto-answer, of course, you can't choose to reject an interaction.

Many browsers, such as Google Chrome, Mozilla Firefox, and Microsoft Edge, also display notices to you about interactions and other events. You can manage these notifications through the settings in the browser. See the help for the browser you are using if you want to control browser notifications.

Why do my emails contain odd-looking codes?

Standard responses use "tokens" (such as `<$ Contact.FullName $>`) that replace a code with specific text. For instance, `Dear <$ Contact.FullName $>` becomes `Dear John Smith` in the email. If you copy and paste token code (such as `<$ Contact.FullName $>`) into your draft email, the replacement happens only after you send the email. To see the replacement text before sending, you must click **Insert Standard Response Text**.

What are these other websites I'm seeing?

Internal and external websites might be integrated into your Agent Desktop main view by your administrator. At the Agent Desktop level, the external website is displayed in dedicated tabs. These tabs allow you access to the website without leaving Agent Desktop.

At the case level, there are two ways to display websites depending on the display mode of the main interaction type.

- For voice, the external website is displayed in the background when an interaction is selected. When the interaction is unselected or closed, the external website is replaced with the previous panel displayed in the background.
- For multimedia, the external website is displayed in a dedicated view in the case itself.

How do I set a disposition code?

You can assign one disposition code to an ongoing or terminated interaction to characterize the outcome of the interaction.

The Disposition Code view is a tab in the Interaction view. It contains a list of choices that you can click to specify the outcome of the interaction. A search field is available to search among the disposition codes.

The Disposition Codes are organized within grouping folders, which cannot be selected as dispositions. These grouping folders do not correspond to business attributes, as they are only textual information.

Select a disposition for the interaction. Once a disposition is selected, the disposition list is hidden and the selected disposition appears in a textbox located at the top of the listing. You can't edit a disposition but you can select a new one.

The complete path to the disposition is available as a tooltip of the disposition name.

Depending on your system configuration:

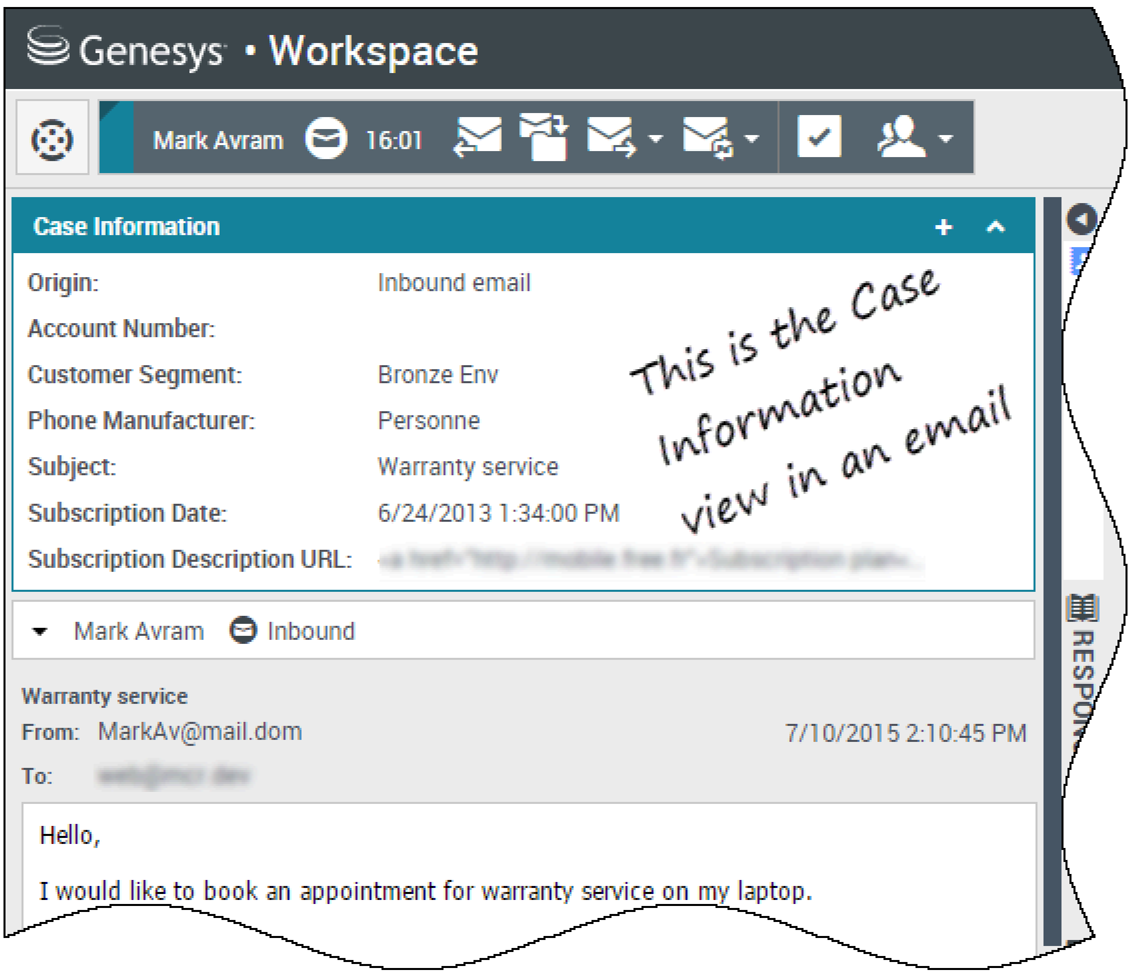
- You might have to set a disposition code before you click **Mark Done**.
- You might be able to click **Mark Done** without a disposition code.
- The Disposition Code view might not be displayed.

How do I add a note to an interaction?

The note is a feature that enables you to enter comments about the current interaction or about a selected interaction. You can view the note in most channels as well as contact history, My History, and My Workbin.

Important: You must click **Save** to store your note.

How do I work with case information?



The case information view (also called attached data) provides information about an interaction — for example, an account number or type of service.

Some case information might be displayed as the title of the web page, an anchor, or a link. If the link is active, it is displayed as blue text.

To make changes, select the field you want to edit or delete. Fields that you can edit display a pencil icon when you roll your mouse pointer over them.

You can add more fields with .

Contacts (v8)

Contacts can be team members or customers and are stored in the Contact Directory. From the Contact Directory, you can call or email a contact, manage a contact's profile information (such as their name, phone number, email address), and review a contact's past interactions.

Where are my contacts?

Link to video

There are a few different ways that you can access your contacts:

- Open your Contact Directory by selecting **Contact Directory** from the Supporting Views menu. This contains all of your contacts, such as team members, customers, and any external contacts.
- Use the Team Communicator to quickly contact a team member, or a favorite or recent contact. This tool is accessed from the **Type name or number** search bar near the top of the screen (or by clicking the button, if you are working with an interaction).

Watch the video to see an overview of the Contact Directory.

How do I find a contact in the Contact Directory?

Link to video

The easiest way is to use the **Quick Search** option.

Start typing a name, phone number, or email address into the **Quick Search** field and the matching results are returned in the **Contact** list.

Customize the search results by using to toggle between grid or list view, or click on the headers to sort by column (list view only).

Watch the video to see how you can search the directory and customize the results.

What is the difference between List View and Grid View?

The Contact Directory uses two different kinds of search modes to find contacts in the Contact Database.

- List View — searches each field of the contact database for the keywords that you specify and displays an unsorted list of all of the contacts in the contact database that match the search criteria.
- Grid View — searches each field of the contact database for the phrase that you specify and displays a list of records where at least one record field contained the search phrase.

See below for more details about these views.

List View

Click the **Show Contacts in List View** button () to display the **Contact Directory List** view.

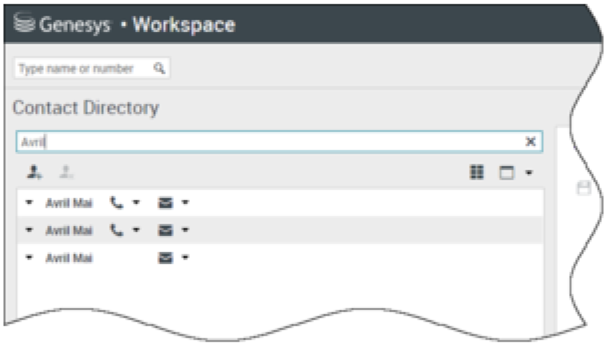
The List view displays an unsorted list of all of the contacts in the contact database that match the search criteria. The search is a 'keyword' search that searches each field of the contact database (name, phone number, email address, or other criteria) for the word or words that you provide in the 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' to search for the keyword(s) that you provide.

Examples:

- Quick search using the keywords *John Daly* as the criteria in a quick search defined to apply to only the **First Name** and **Last Name** fields will match a contact where **First Name**=*John* and **Last Name**=*Daly*
- Quick search using the keywords *John Junipero* as the criteria in quick search defined to apply to only **First Name**, **Last Name**, **City**, and **Address**, will match a contact where **First Name**=*Johnny* and **Address** = *2001, Junipero Serra Blvd*.

Results are returned in a list that is not sortable. If the result set is too large, you can refine the search results by adding more keywords to your search criteria (the sort order in this context is undefined).

> **Tip**
>
> Genesys does not currently support mixed character sets in contact database searches, so, for example, it is not possible to search for words in Chinese Simplified characters and Latin characters in the same search string, and the sequence of Chinese Simplified characters immediately followed by Latin characters will not be considered as two words.



Grid View

Click the **Show Contacts in Grid View** button () to display the **Contact Directory Grid** view.

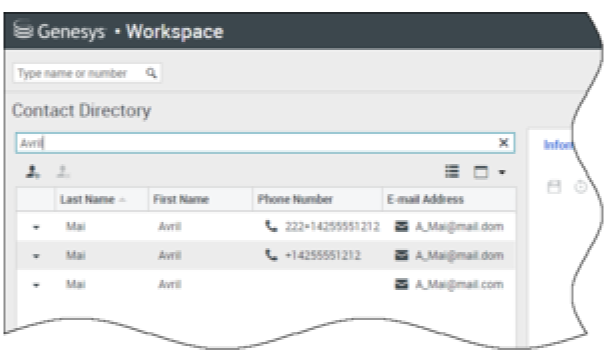
Grid mode performs a search that considers each field of the contact database (name, phone number, email address, or other criteria) as a *phrase* (as opposed to the list view mode that considers each field as a *tokenized* list of words) and uses the search criteria that you provide as a *phrase*, not as a list of words.

Examples:

- Quick search using the phrase *John Pa* as the criteria in a quick search defined to apply to only the **First Name** and **Last Name** fields will match a contact where **First Name**=*John Paul* and **Last Name**=*Doe*
- Quick search using the phrase *John Daly* as the criteria in quick search defined to apply to only the **First Name** and **Last Name** will *not* match a contact where **First Name**=*John* and **Last Name**=*Daly*

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.

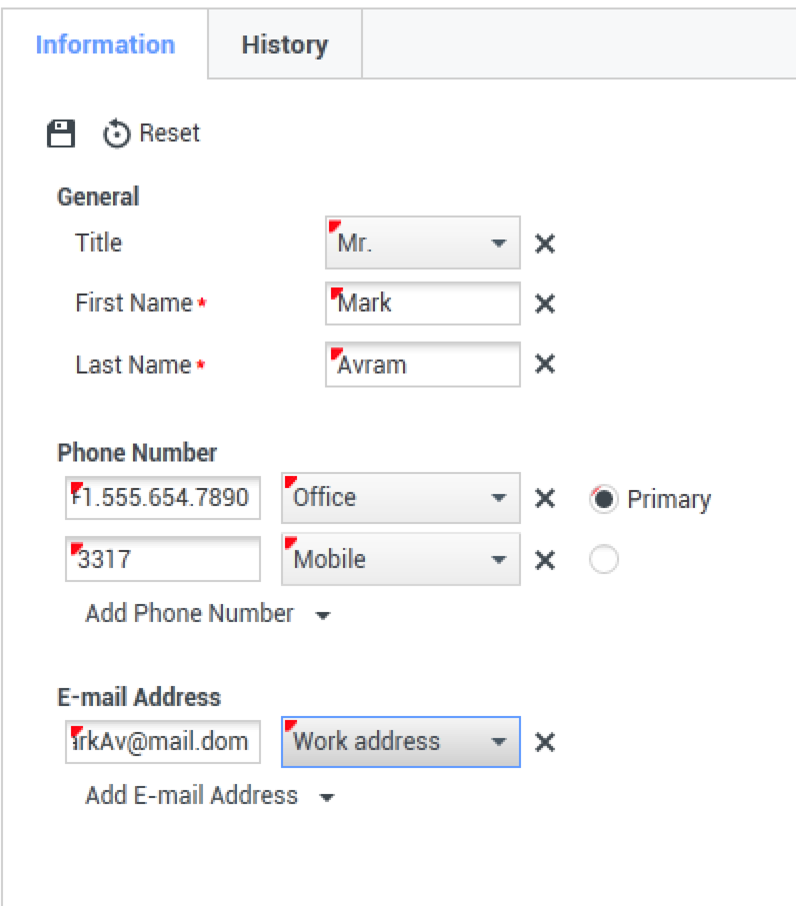
What actions can I take with a contact?

Link to video

- Call or email the contact.
- View and manage their profile **Information**.
- View their **History** of interactions.
- Use  to delete the contact.
- Use **More Actions** to perform other actions (depends on your permissions).

Watch the video to see how you can call or email a contact from the Contact Directory.

How do I add a contact?



Your site might be set up to add new contacts automatically. But if you are working with a contact who is not in the Contacts Directory, you might be able to add them yourself while the interaction is still active.

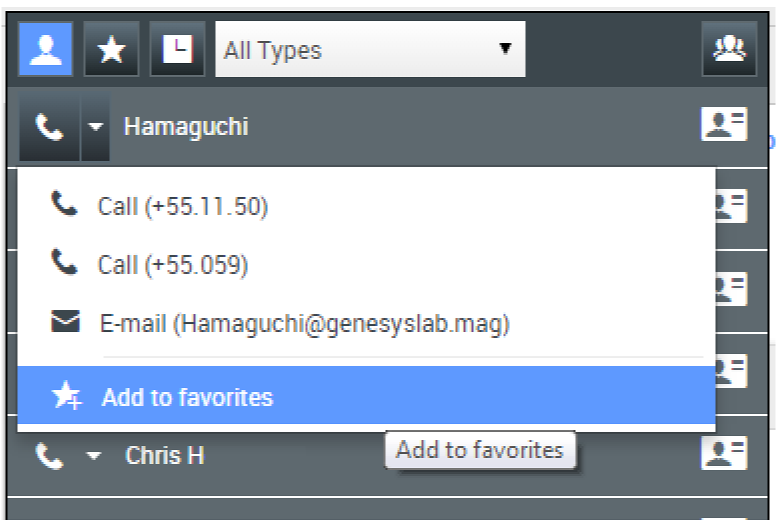
to create a new contact.

to save your changes.

to reset and clear any unsaved information.

You can also add additional phone numbers and email addresses for the new contact, and specify a phone number or email address as the *primary* contact number or address.

How do I set up my favorites?



Typically, your favorites are team members you contact frequently. You can mark a contact as a favorite by selecting **Add to Favorites** from the drop-down actions menu in Team Communicator. You can also assign the favorite to a category.

To see your personal and corporate favorites, select (favorites filter) on the Team Communicator bar.

Favorites are marked with a (star). Use the filters and sorting options to change the types, categories, and order of your favorites.

To make changes to a favorite, use **Edit Favorite**. To remove a favorite, use .

Favorites marked with (locked star) are corporate favorites, and can't be edited or removed. The same favorite can belong to both your personal and corporate favorites, but it will be shown as a corporate favorite in the results list.

Note: A favorite that you created by directly dialing a contact will appear only in a favorites search *and* your list of recent calls if you previously called the person.

Contact and interaction history (v8)

Agent Desktop lets you look at the interactions that you and your coworkers have worked on in the past. You can view information about the interactions, including notes and case data. You can also open and process some interactions.

How can I find the interactions I've worked on?

The My History view enables you to view and manage your previous interactions with a contact.

To display the My History view in the main view, click and select **My History**.

The Chronology slider lets you see all of your interaction history, or just those from the last day, week, or month.

The My History view **Filter** button enable you to refine your results by displaying only those interaction types that you select.

The Quick Search field enables you to enter keywords or a phrase to search for in the contact's interactions, such as the subject of an email or chat, the body of a chat transcript, a customer name, the name of the agent who handled the interaction, or other text that your administrator allows you to access.

[+] Show video: My History: Quick Search

Link to video

The Advanced Search feature enables you to choose conditions to search only within the limits that you define.

[+] Show video: My History: Advanced Search

Link to video

When you find the voice, chat, email, Facebook, or Twitter interaction you are searching for, select it to view the details and other information.

You can open some interactions for editing or handling. Just select it and click .

You can open email interactions and forward them inline to an external resource. Just select it and click .

Use the **Show Details Panel on Bottom/Hide Details Panel** button () to change the display of the Details panel.

How do I explore the history of a contact?

The Contact History view lets you see and manage previous interactions with a contact you have selected from the Contact Directory or from the information view of the current voice, chat, email, Facebook, or Twitter interaction.

[+] Show video: Contact History

Link to video

Use the Contact History view to do the following:

- Find interactions for the current contact or the currently selected contact.
- View information about the selected interaction..

The Chronology slider lets you see all of your interaction history, or just those from the last day, week, or month.

The Contact History view **Filter** button enable you to refine your results by displaying only those interaction types that you select.

The Quick Search field enables you to enter keywords or a phrase to search for in the contact's interactions, such as the subject of an email or chat, the body of a chat transcript, a customer name, the name of the agent who handled the interaction, or other text that your administrator allows you to access.

[+] Show video: Contact History:Quick Search

Link to video

The Advanced Search feature enables you to choose conditions to search only within the limits that you define.

[+] Show video: Contact History: Advanced Search

Link to video

When you find the voice, chat, email, Facebook, or Twitter interaction you are searching for, select it to view the details and other information.

You can open some interactions for editing or handling. Just select it and click .

You can open email interactions and forward them inline to an external resource. Just select it and click .

Use the **Show Details Panel on Bottom/Hide Details Panel** button () to change the display of the Details panel.

How do I find any interaction?

Sometimes you need to find an interaction that someone else at your contact center worked on, or maybe you worked on it, but you can't remember who the contact was or when you worked on it. You might be a team lead or supervisor who is looking for interactions related to a specific topic or was processed by a specific agent or agents.

The Interaction Search view lets you search the entire interaction database for all media types, with all contacts, and handled by any agent.

To display the Interaction Search view in the main view, click and select **Interaction Search**.

The Chronology slider lets you see all of your interaction history, or just those from the last day, week, or month.

The Interaction Search view **Filter** button enable you to refine your results by displaying only those interaction types that you select.

The Quick Search field enables you to enter keywords or a phrase to search for in the contact's interactions, such as the subject of an email or chat, the body of a chat transcript, a customer name, the name of the agent who handled the interaction, or other text that your administrator allows you to access.

The Advanced Search feature enables you to choose conditions to search only within the limits that you define.

When you find the voice, chat, email, Facebook, or Twitter interaction you are searching for, select it to view the details and other information.

You can open some interactions for editing or handling. Just select it and click .

You can open email interactions and forward them inline to an external resource. Just select it and click .

Use the **Show Details Panel on Bottom/Hide Details Panel** button () to change the display of the Details panel.

Using Quick Search

The Quick Search field lets you to enter keywords or a phrase to search for in the interaction database, such as the subject of an email or chat, the body of a chat transcript, a customer name, the name of the agent who handled the interaction, or other text that your administrator allows you to access.

[+] Show video: Quick Search

Link to video

Searches of customer information like name and address, and of interaction information like subject or body text are 'starts-with' searches, meaning that each of the fields that you are allowed to search for words or strings, are searched for words that start with the keywords that you enter in the Quick Search field.

Searches of information that has been customized by your administrator are 'equals' searches, meaning that the search looks for exact matches with what you enter. Ask your administrator about custom information.

Text search is:

- Not case sensitive. TEXT, Text, text, and teXt are all treated as the same word.
- Searchable as either a group of individual words or as sentences.
  - Put a group of words in double quotes to search for a specific sentence. Searching for `"Find me"` returns all interactions that contain the exact match for the phrase 'Find me'.
  - Otherwise, each word is treated as a separate search condition. Searching for `Find me` returns all interactions that contain one word that starts with `Find` *and* one word that starts with `me`.

Use the **Filter** menu to see only interactions of a certain type, like voice, email, or chat. Perhaps that interaction you are looking for was handled through a chat. To see only chat interactions, select **Show chat interactions** from this menu.

When you find the interaction you are searching for, select it to view the details and other information in the Details, Notes, and Case Data tabs.

Use the **Show Details Panel on Bottom/Hide Details Panel** button ( ) to change the display of the Details panel.

Using Advanced Search

The Interaction Search *Advanced Search* feature lets you choose a set of conditions that you want to use to limit the search to only those interactions in the interaction database that match the conditions you specify.

[+] Show video: Advanced Search

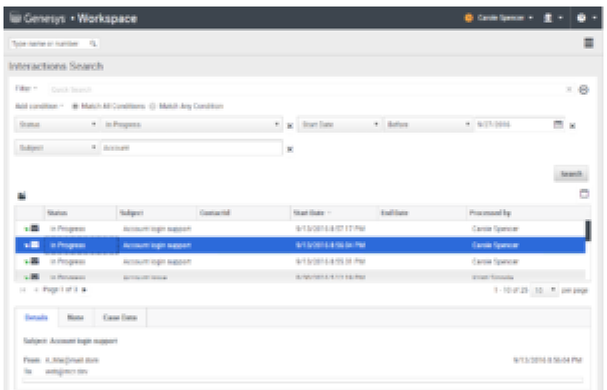
Link to video

Click  next to the Quick Search field to open the Advanced Search view.

Tip

Your administrator decides what conditions you are allowed to search on, so your Interaction Search view might not exactly match the screen shots and video.
For the **Add Condition** menu, your administrator might have set up groups of conditions which appear as submenus. This makes it easier for you to find the condition you want to use.

This is what the Advanced Search view looks like:



Use the controls described here to set up your search, then click **Search** to find the interactions that match the conditions that you specify.

When you find the interaction you are searching for, select it to view the details and other information.

Filter

Use the **Filter** menu to see only interactions of a certain type, like voice, email, or chat. Perhaps that interaction you are looking for was handled through a chat. To see only chat interactions, select **Show chat interactions** from this menu.

Add Condition

Use the **Add Condition** menu to add search criteria to the Advanced Search view. When you make a selection from this menu a new condition entry is added above the **Search** button. Add as many conditions as you need. The view will scroll if necessary.

To remove a condition, click the X next to the entry.

Each condition entry that you add lets you refine your search. For example, you might limit your search to interactions that have a status of "In Progress". You might know approximately when the interaction was handled. the **Start Date** and **End Date** conditions let you limit the search to interaction handled before, on, between, or after a certain date.

For some conditions, you might have to enter text instead of selecting criteria from a menu or picking a date.

Text search is:

- Not case sensitive. TEXT, Text, text, and teXt are all treated as the same word.
- Searchable as either a group of individual words or as sentences.
    - Put a group of words in double quotes to search for a specific sentence. Searching for `"Find me"` returns all interactions that contain the exact match for the phrase 'Find me'.
    - Otherwise, each word is treated as a separate search condition. Searching for `Find me` returns all interactions that contain one word that starts with `Find` *and* one word that starts with `me`.

For some conditions, you might have to search the contact database or search for someone in your contact center, such as other agents who processed the interaction you are looking for. For searches of contacts and internal targets, the Team Communicator opens when you click in fields such as **Processed By**.

Match All/Any Conditions

Use the **Match All Conditions** option to limit the search to only those interactions that meet *All* of the conditions that you specify.

Use the **Match Any Conditions** option to find the interactions that meet *at least one* of the search conditions that you specify.

Viewing search results

The search results are displayed in the interactions table. The search results table is not sortable. To sort the interactions table, clear the search field to display the full history set.

> **Important**
>
> Agent Desktop returns a maximum of 100 interactions. If you do not find the interaction you are searching for, you might have to refine your search criteria further.

Navigating the search results table

After you click the magnifying glass in Quick Search or **Search** in Advanced Search, Agent Desktop looks through the interaction database to find interactions that meet the conditions that you specified.

All the interactions that are found are displayed for you in the search results table. The table displays results in pages if many interactions are found. 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.

Details, Notes, and Case Data

The **Details**, **Note**, and **Case Data** tabs display information for any interaction that you select in the search results table.

- **Details** — 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.
- **Note** — enables you to view notes written by the agents who handled the interaction.
- **Case Data** — enables you to view the Case Data/case information and other attached data for the selected interaction.

Workbins (v8)

A workbin is like a personal queue or storage area where you can store email, Facebook, and Twitter interactions to be handled later.

As an agent you have two different workbins that you can use. If you are a Supervisor (Team Lead), you might have additional workbins that you can use to manage the interactions of the agents that you supervise, and you might be set up to edit Case Information.

You can access all of your workbins from the **Supporting Views** ( ) menu.

How do I use the My Workbins view?

To view another workbin, select it in the Workbin explorer on the left-hand side of the view. The number of unopened email messages in each workbin folder is indicated next to the name of the workbin folder.

The list of available workbins depends on how your system is set up by your administrator. Some of the workbins which might be configured for you include:

- **In Progress** contains unprocessed inbound email interactions and Facebook and Twitter messages that you've saved by clicking **Save in Draft Workbin**.
- **My Drafts** contains outbound email interactions and Facebook and Twitter messages that you've saved by clicking **Save in My Draft E-mails Workbin**.

To view details, notes, and case date about an interaction that is stored in one of your workbins, select it. Information about the selected interaction is displayed in the tabs at the bottom of the Workbins view. To display the interaction information tabs, click the **Show/Hide Details Panel** button. ( )

To open an interaction for editing or handling, select it and click .

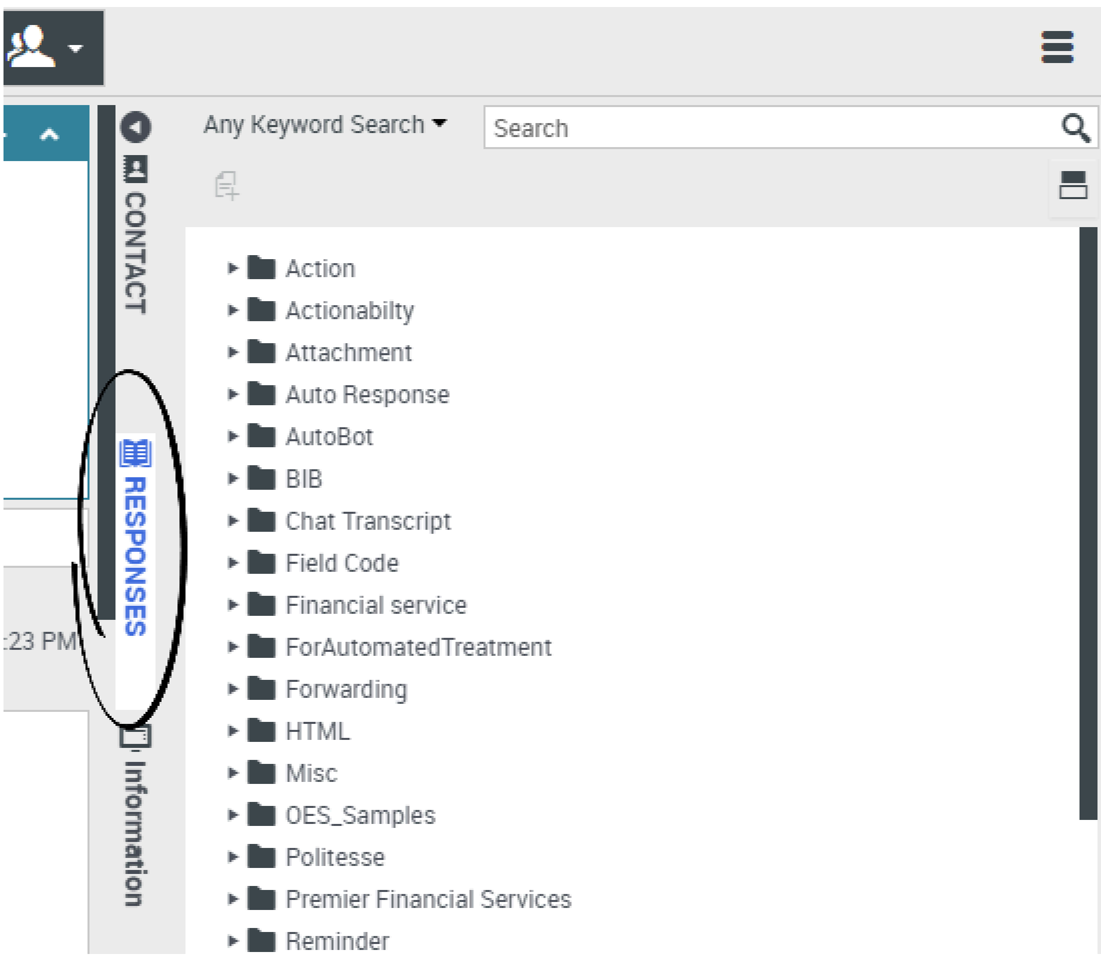
Standard responses (v8)

The Responses view enables you to access a database of prewritten standard responses for your interactions. You can insert a response as reply into any outbound interaction, such as an email or a chat message, or you can read them to the contact during a phone interaction.

After inserting a response into an outbound interaction, such as an email or a chat message, you can modify the contents of the text.

Show video: **Adding a Standard Response to an outgoing email:** Link to video

Using the Responses View



To access the Responses view, select the vertical **RESPONSES** button on the active-interaction window.

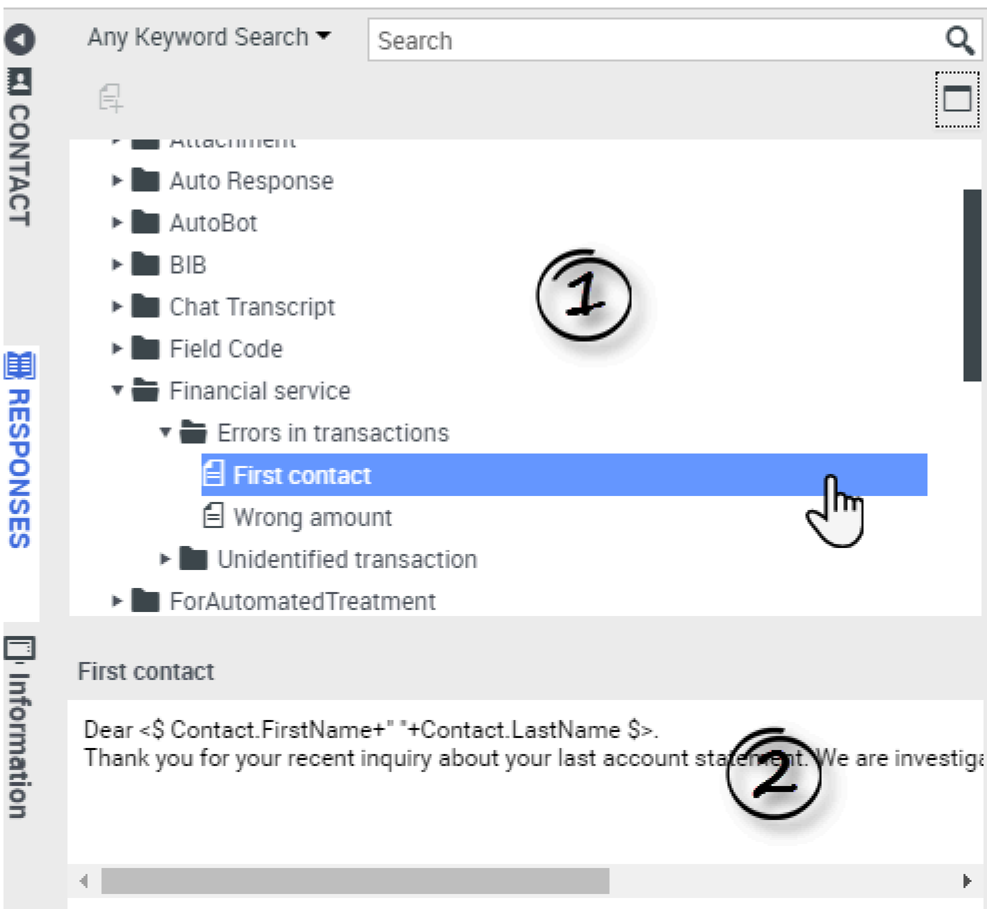
The Responses view comprises two main areas: Responses Explorer folder view and the response display area.

You can find responses in one of two ways:

1. Browse using the Responses Explorer folder view

1. Search the responses database by typing in the Search and Filter field.

Responses Explorer



The Responses Explorer contains a tree view of folders (standard-response categories) and pages (standard-response documents). You can:

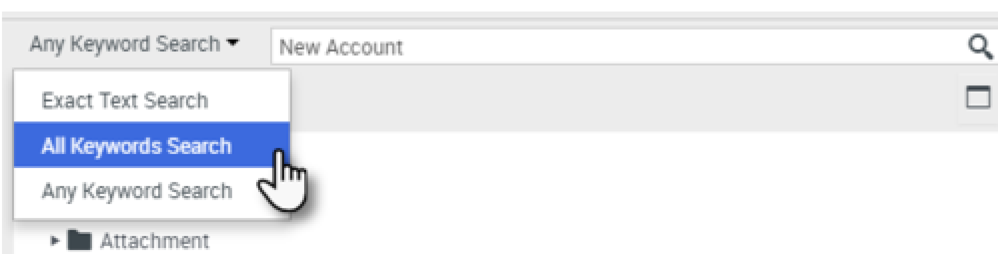
- Select a response in the explorer area (1) to view its contents (2).
- Navigate the responses folders and documents by selecting folders to open or close them and selecting documents to select them.

- Insert standard-response text into the current interaction at the insertion point by selecting a response document and then selecting **Insert Standard Response Text** .
- Show and hide the responses details area by selecting **Show Detail**/**Hide Detail** .
- View the contents of the selected response document in the responses details area.
- Copy content from the responses details area and paste it into the message area of your email or chat interaction. Standard responses use "tokens" (such as `<$ Contact.FullName $>`) that replace a code with specific text. For instance, `Dear <$ Contact.FullName $>` becomes `Dear John Smith` in the email. If you copy and paste token code (such as `<$ Contact.FullName $>`) into your draft email, the replacement happens only after you send the email. To see the replacement text before sending, you must click **Insert Standard Response Text**.

Search and Filter

The Search and Filter area enables you to specify keywords for which to search in your company's Standard Response Library. It has the following features:

- **Search field**—Enter the keyword for which you want to search, and click the magnifying-glass icon to initiate the search.
- **Search type**—A drop-down list that enables you to search using one of the following strategies:
  - **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.

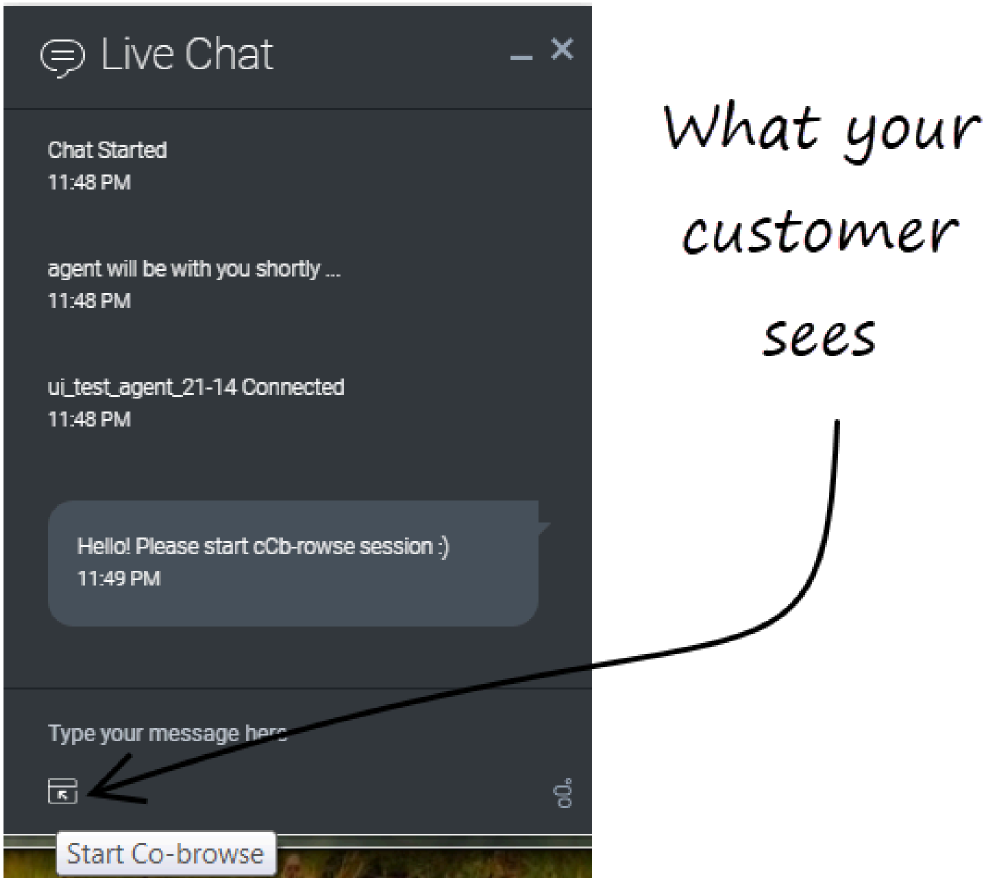


> **Tip**
> The search is applied to the selected view; to clear the search criteria and display all contents, click the **X** in the search field.

Co-browse sessions (v8)

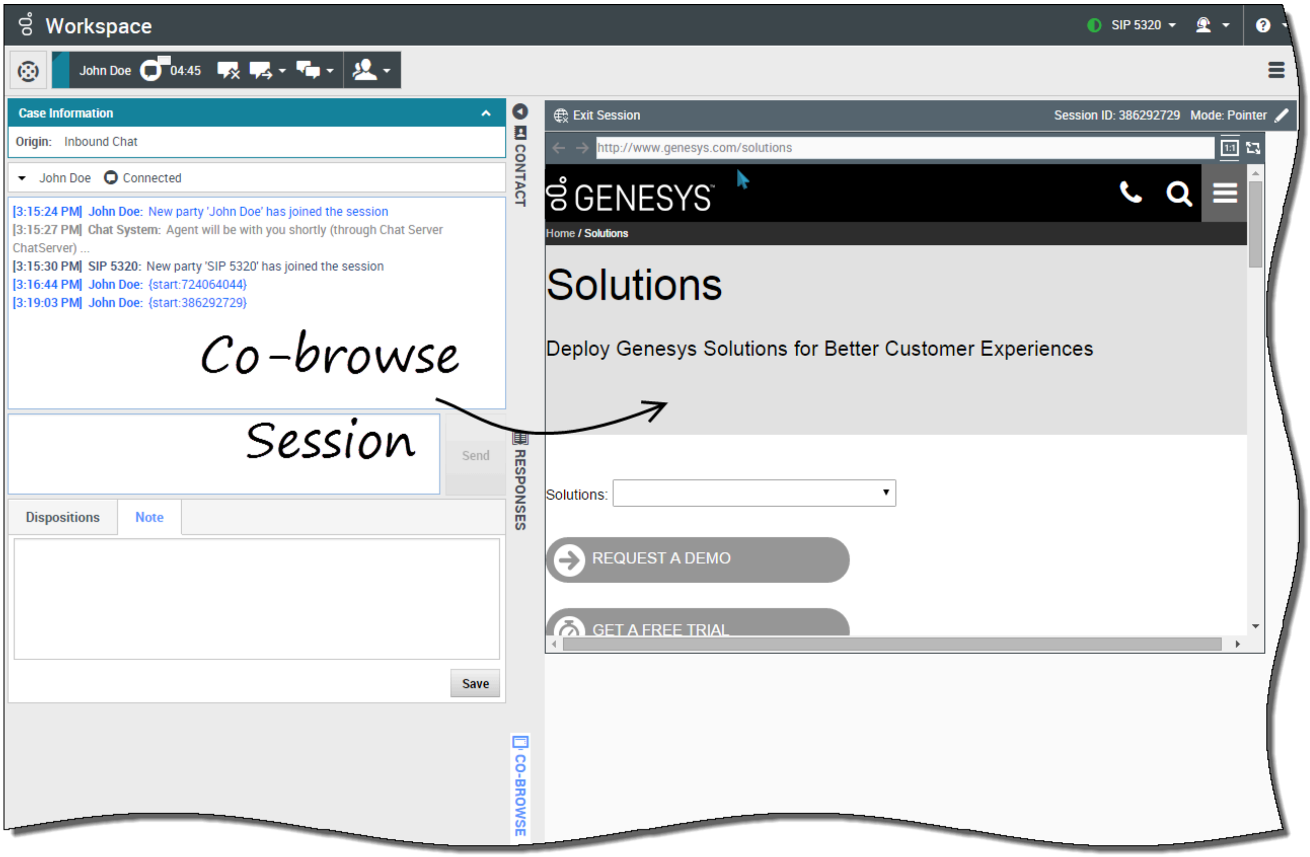
A Genesys Co-browse session lets you and a customer navigate the same web page at the same time. Unlike conventional screen-sharing applications where one party sees an image of the other party's browser, in a Genesys Co-browse session both you and the customer share the same instance of the web page.

Start a Co-browse session



The customer *must* initiate a Co-browsing session. You cannot start a Co-browse session. Websites set up for Genesys Co-browse include a widget with a **Start Co-browse** button that the customer must click to start a Co-browsing session.

One of the widgets that your customer sees might look something like this. Clicking the **Start Co-browse** button will present the customer with a session ID.



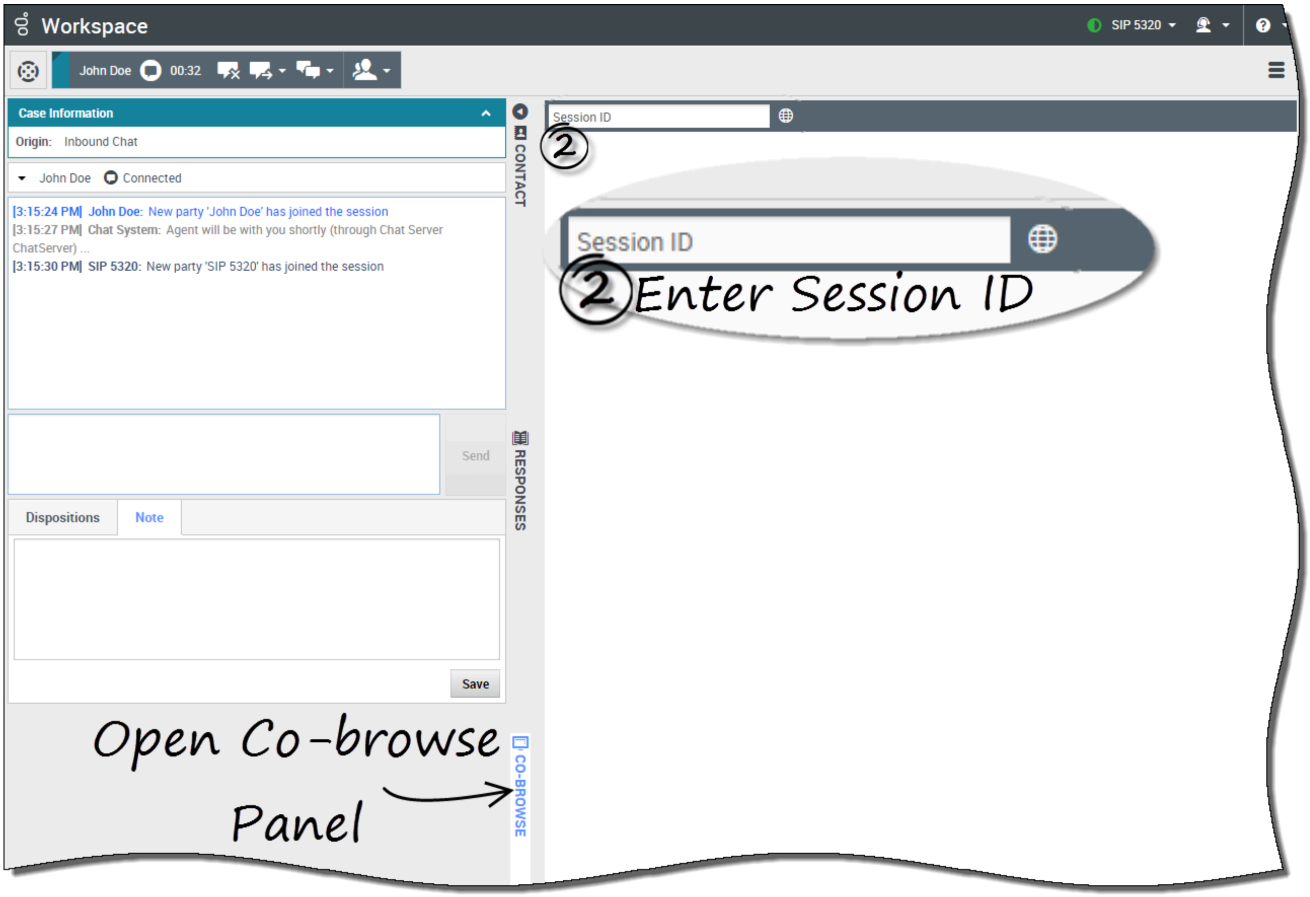
If you are engaged in a chat with the customer, the Co-browse session will automatically start in your desktop. Once the Co-browsing session starts, you see a special message in chat—**{start:123123123}** for example, where **123123123** is the session ID.

You can only have one Co-browse session open at a time (regardless of how many chat sessions you might be handling).

Important

For security considerations, you will see placeholder graphics for certain website elements.

Start a Co-browse session using a session ID



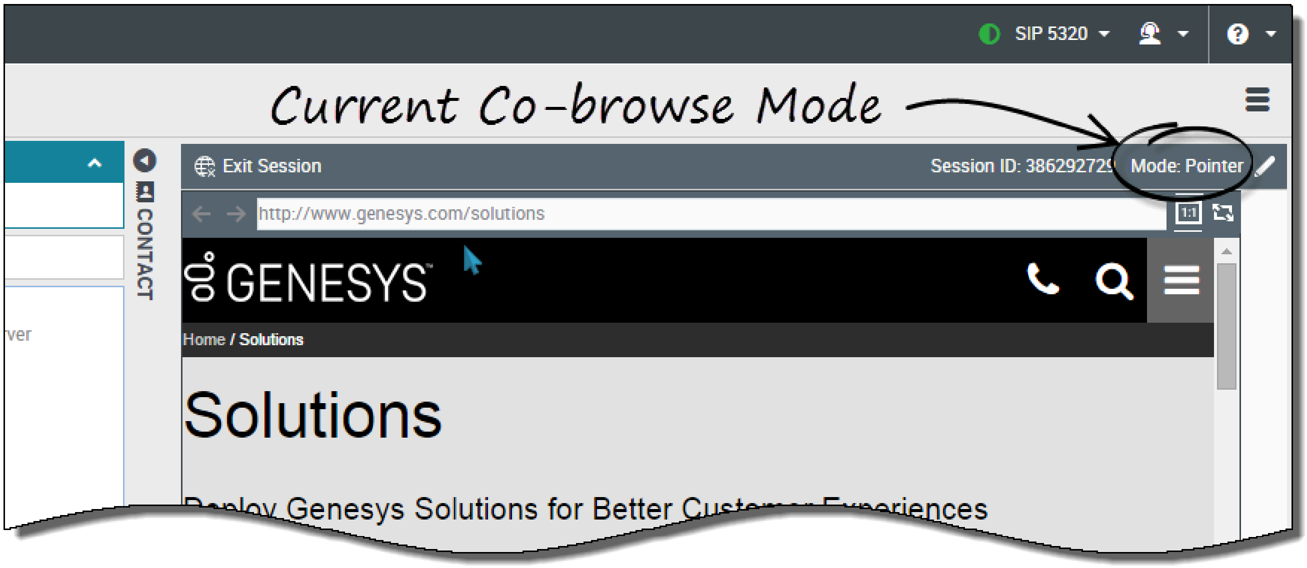
If you are on a call or a chat and your Co-browse session does not automatically start, you can use a session ID to start a Co-browsing session.

Get the session ID from the customer and enter it in the **Session ID** field, then click the globe icon.

You should now see the customer's browser. You do not need to navigate to the same page as the customer. Co-browse uses the session ID to make sure that you and the customer are viewing the same page. As soon as the session starts, the customer receives a notification on their screen that they have started a Co-browsing session.

> **Important**
> Genesys Co-browse does not support conference or transfer for chat and voice.

Use Pointer Mode

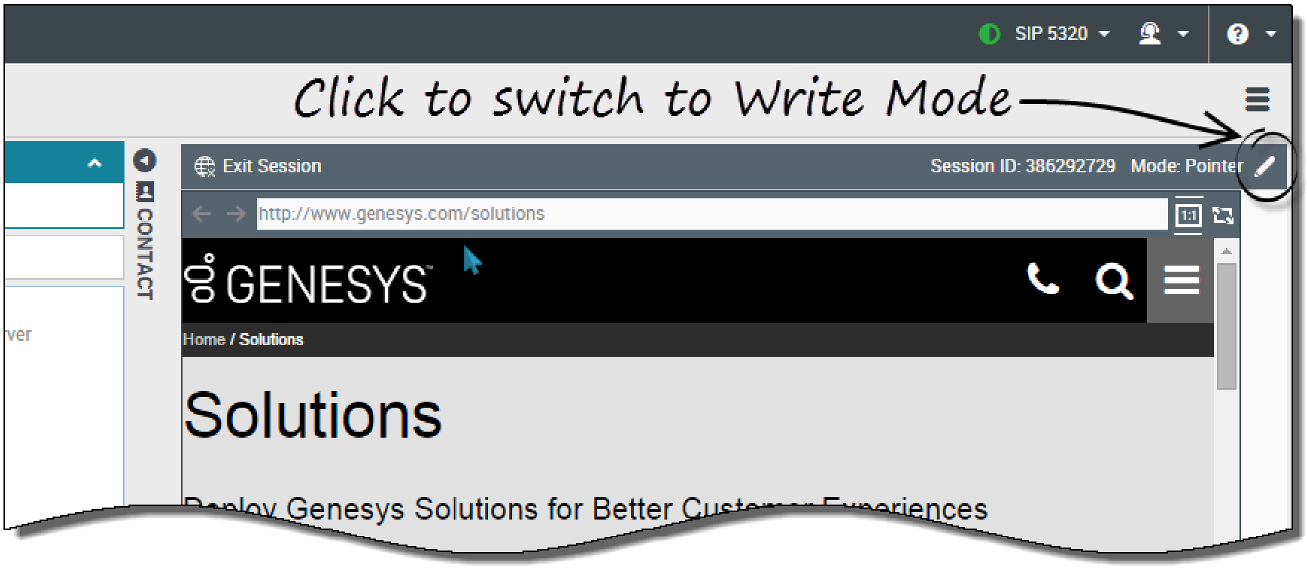


When you first join a Co-browse session, you are in *Pointer Mode*. You can see what the customer sees but you cannot perform any actions in their browser. You cannot navigate, input information, or submit forms.

You and the customer can see each other's mouse movements at all times and your mouse clicks create a red circle effect around your mouse pointer. Use the red circle effect to direct the customer to specific sections on the web page.

At any time, you can send a request to the customer to enable *Write Mode*.

Switch to Write Mode



In Write Mode, both you and the customer can perform conventional user actions. Both of you can enter text and click buttons.

To switch to Write Mode, click the pencil icon at the top right corner of the Co-browse area. The customer is asked to approve the switch to Write Mode. Write Mode is enabled only if the customer approves. You receive a notification about the customer's response.

If the customer approves the switch to Write Mode, the pencil icon turns into a pointer icon.

Tip: If Write Mode is disabled by administrators, you will not see the pencil icon.

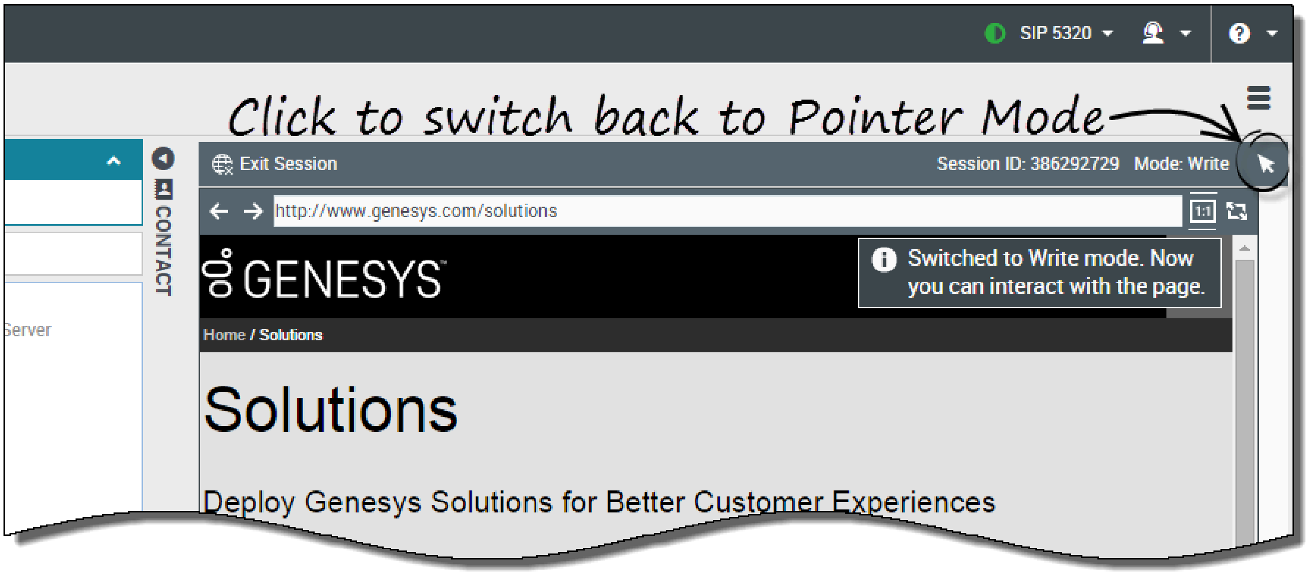
In Write Mode, you can navigate by clicking links in the web page or by using the following navigation options in Agent Desktop:

- Click the back and forward arrows.
- Type a URL into the URL bar and press **Enter**.
- Click **Refresh** to reload the page.

Administrators can limit which interactive elements are enabled for you in Write Mode.

You can only co-browse while the customer is on your company's site. If the customer goes to another site, the co-browse session stops until they come back to your site.

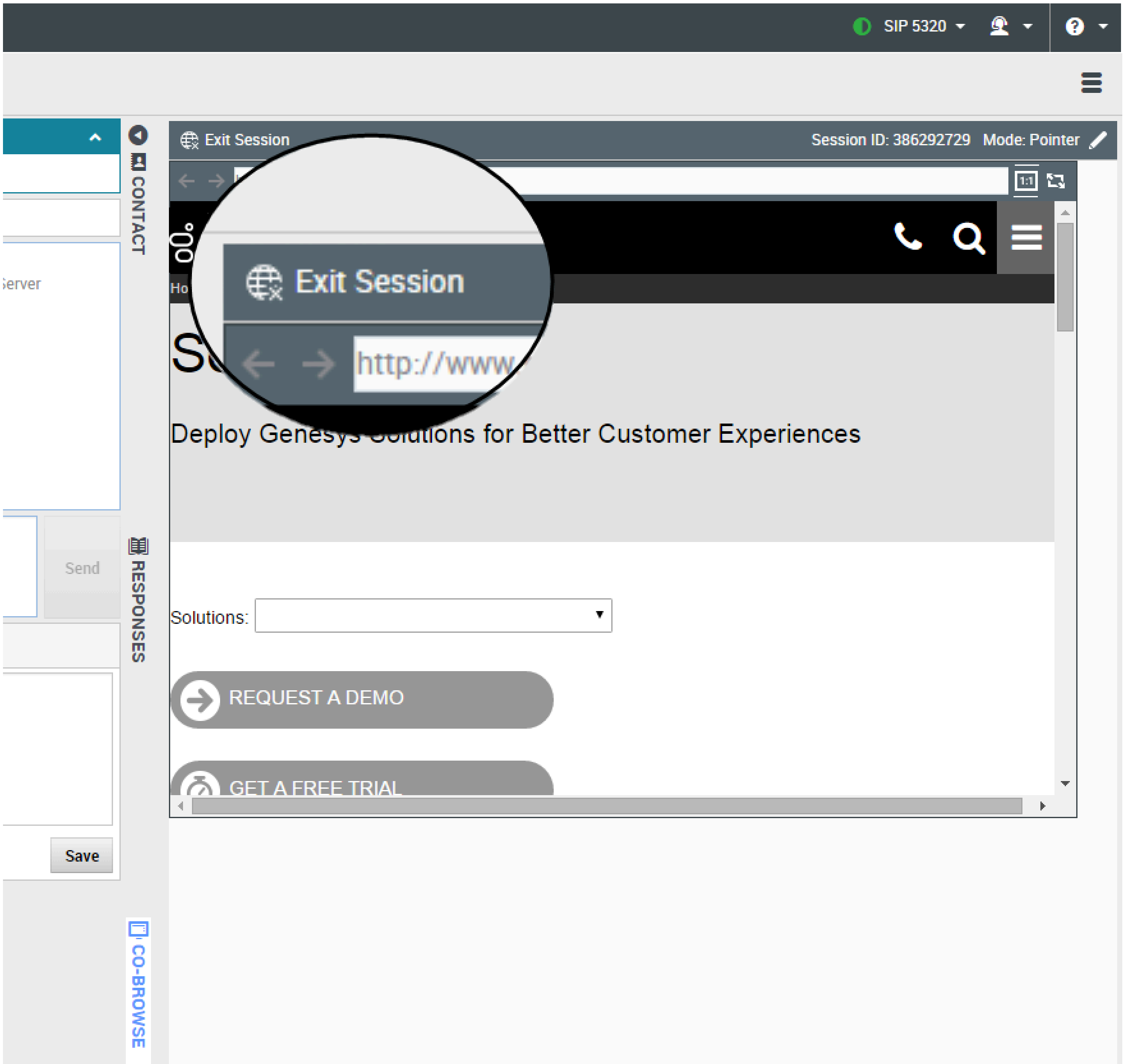
Switch back to Pointer Mode



To switch back to Pointer Mode, click the pointer icon at the top right corner of the Co-browse area.

The customer can also switch back to Pointer Mode at any time.

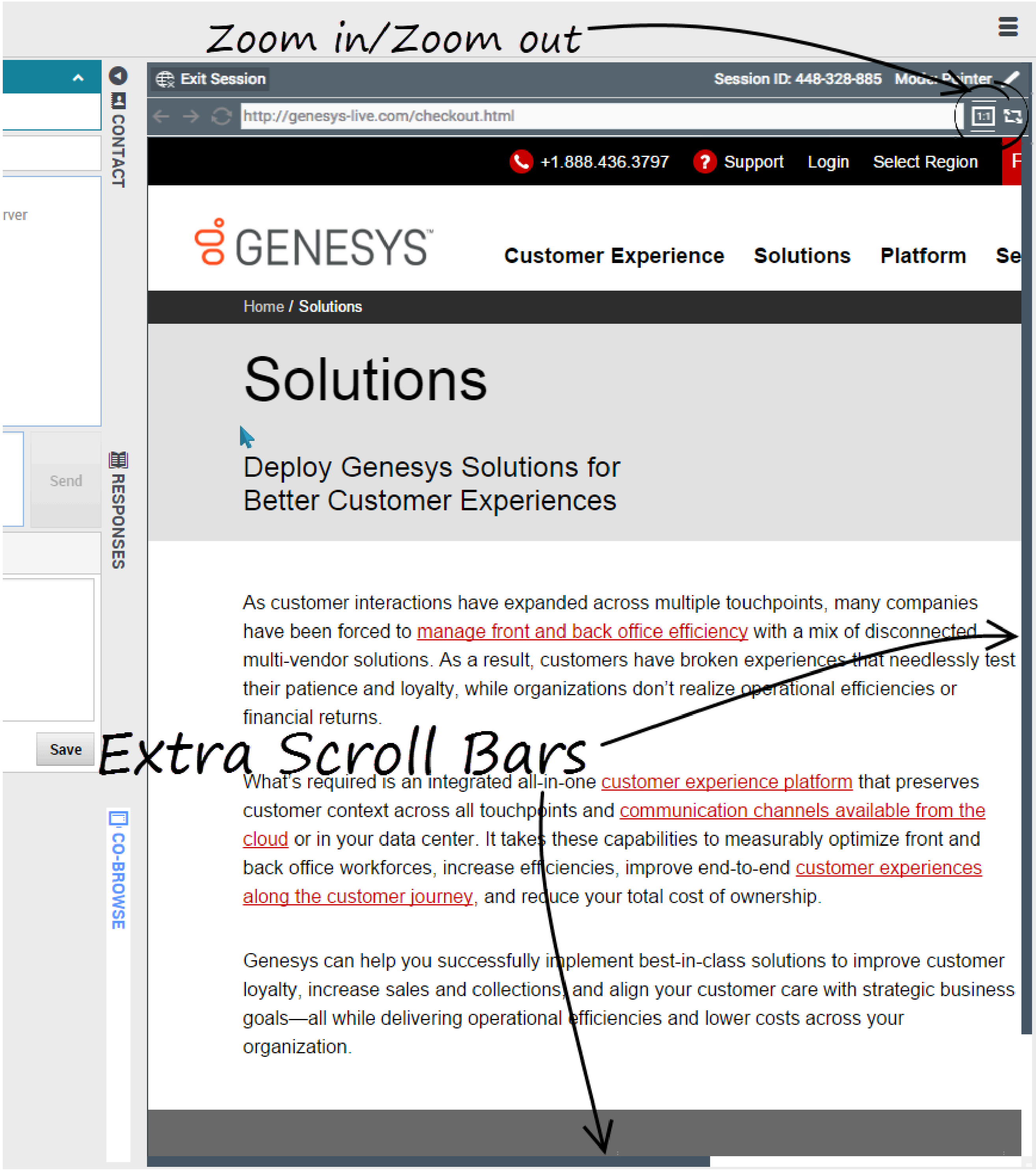
Stop a Co-browse session



Once a Co-browse session starts, both you and the customer have the ability to end the session with the **Exit Session** button. Ending your ongoing chat or call with the customer also immediately ends the Co-browsing session.

If the customer exits the session, you are notified and your browser no longer displays a view of the customer's browser. Likewise, if you exit the session, the customer receives a notification. Exiting the Co-browse session does not end your related chat or call with the customer.

Manage your virtual browser



The size of your virtual browser (a window on your computer that displays the customer's browser window) matches the actual size at the customer's end. Scroll bars appear to help you navigate the customer's browser if their window is bigger than your Agent Desktop Co-browse area. Or, you can use the zoom-to-fit button to scale the display to fit in your window.

Visibility of sensitive data

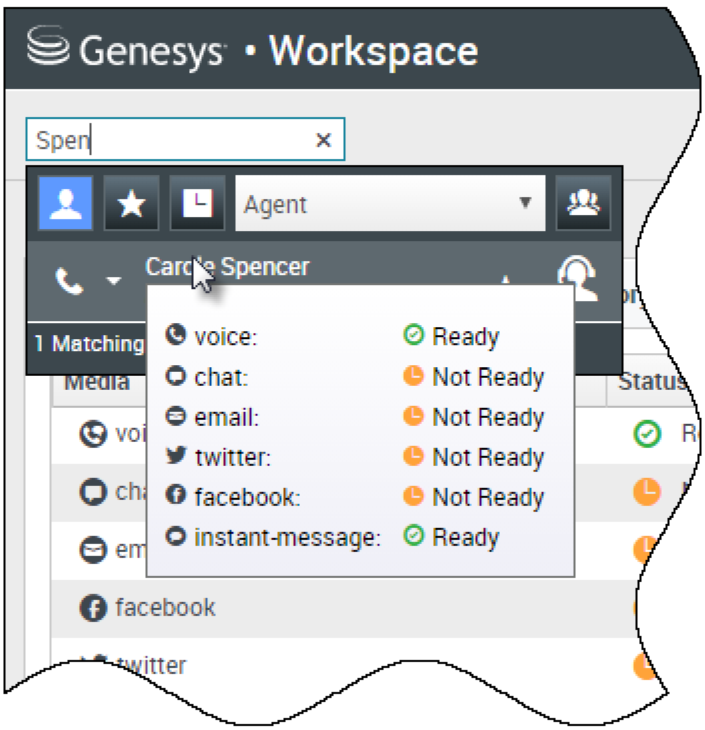
Administrators can limit which fields are readable to you; asterisks (****) display anywhere that characters are masked. For example, administrators might choose to mask only the customer's password and social security number—or an entire page—from all agents. Images can also be masked from you and will display as a grayed out area. Both masked fields and images are surrounded with a purple border.

At the same time, control for some elements, like buttons or links, can be disabled. These disabled elements are surrounded with a green border. By default, all **Submit** buttons are deactivated for agents. If you click on a **Submit** button, nothing happens. The customer always has permission to submit any web forms, just as they would while browsing normally.

Internal interactions (v8)

Internal interactions are communications between you and other people inside your company. They are typically internal-only, such as consultations, transfers, and messages from your system or administrators, but can also be conferences that involve the customer. Your supervisor might also use barge-ins or agent monitoring to listen silently or communicate with you and/or the customer.

How do I contact people in my company?

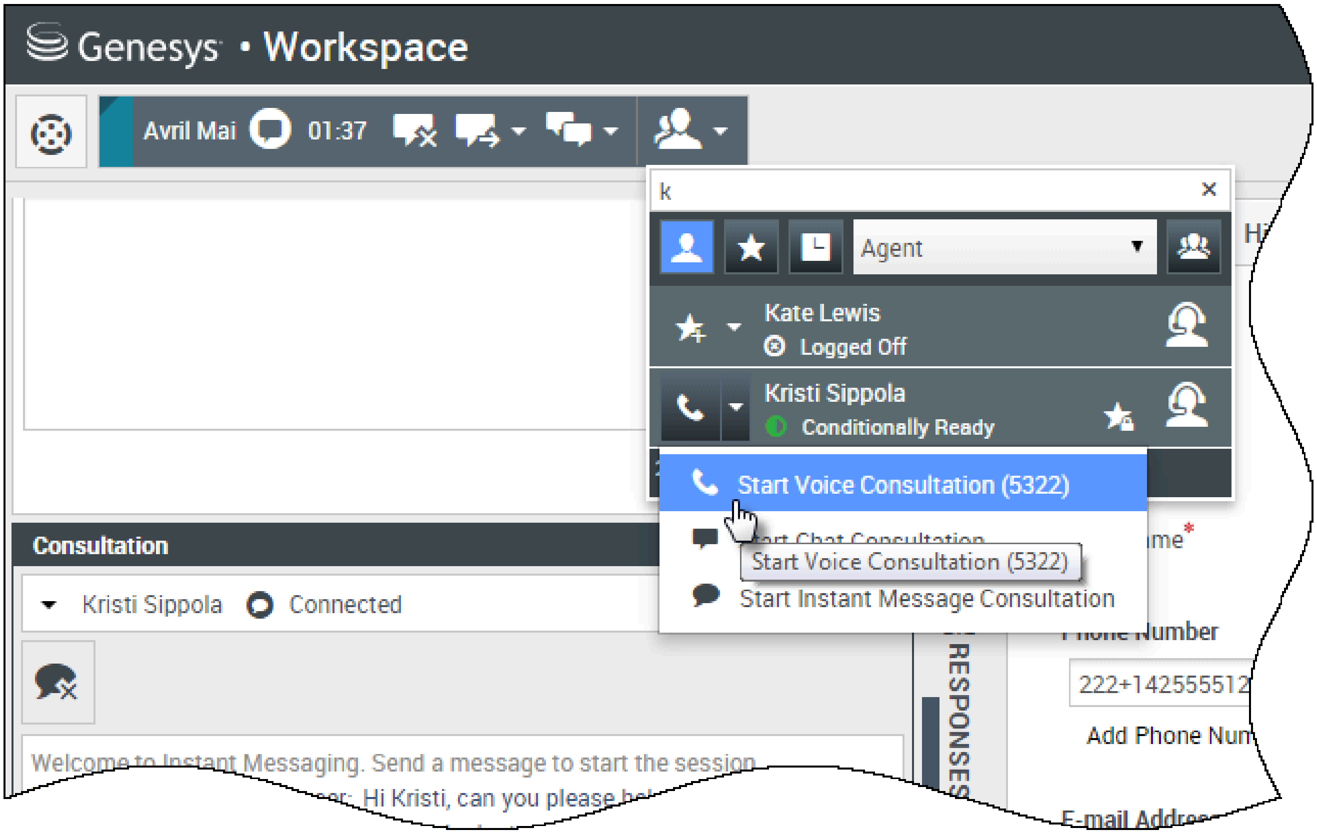


The Team Communicator tool lets you search through your company directory for an agent, team lead, agent group, or other target that you want to call, consult with, or transfer to.

Type in the name of the person that you want to call, then hover your mouse pointer over their name in the list of search results. A pop-up is displayed that lets you know whether that person is ready to take a call, is on a break, is busy, or is logged off.

If the person is available, use the action menu to call them. If not, try a different channel or try again later.

How do I start a consultation?



A consultation lets you discuss an active call, email, or chat with another team member. It's different from a conference because the customer is not connected to the session. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

 starts a consultation.

Search your list of team members to find the person or internal target (an agent group, a routing point, or a skill) you want to consult with and select the type of consultation you want. Once connected, you can monitor the status and use the controls as you would for any other interaction.

Some things to keep in mind:

- Either party can end the consultation, but ending the consultation does not end your interaction with the customer.
- If you end the session with the customer, the consultation remains active.
- Consultations are private — the customer can't see or hear your discussions.
- The team member can see the case and contact information and, if any, the chat transcript.

- To close an active chat, both you and the consulted team member must mark it done .

If you are on a call and start a voice consultation, the original call is put on hold while you consult with your selected team member.

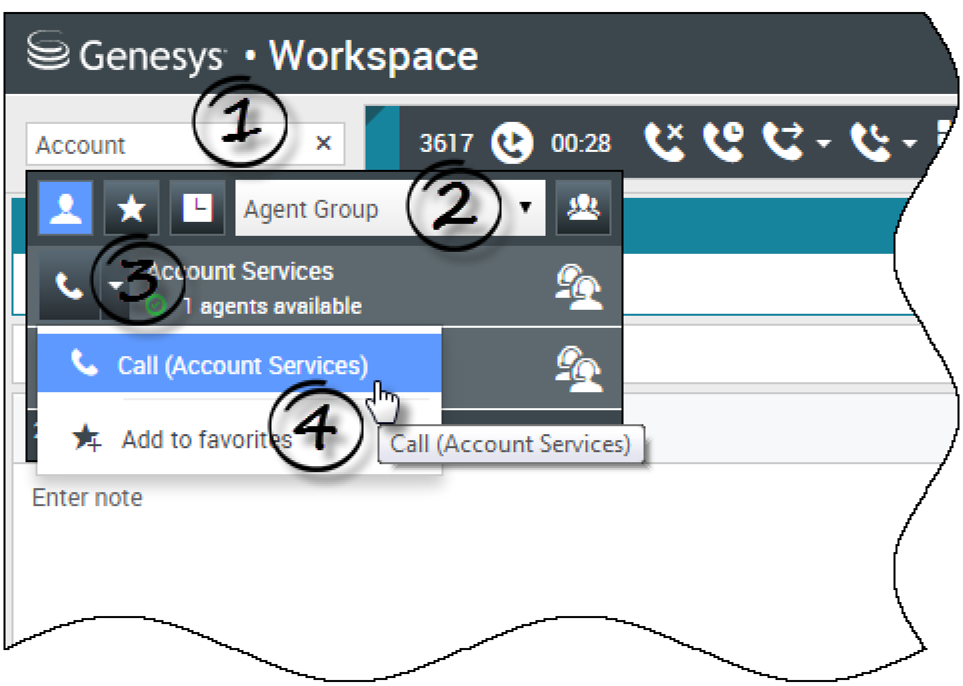
- resumes the original call (and also allows you to toggle between the two calls).
- ends the consultation and resumes the original call from hold.

If you start a chat, a new window opens where you can send private messages to the team member. You can also start multiple consultations. For example, you can start a voice consultation while a chat consultation is in progress.

Prior to a conference or transfer, you can consult with your team member by selecting **Consult** in the toolbar. After the consultation request is sent, the initial call is put on hold.

While in a consultation, you can also complete a conference or transfer between your team member and your customer. To do this, select **Instant Call Transfer** () or **Instant Call Conference** (), and select the same button beside the desired team member's name.

How do I call an Agent Group?



In some contact centers, agents are assigned to specific groups. For example, some agents in a company might speak different languages, have particular product expertise, or have a higher level of security clearance. These are all specialties that might be associated with an agent's group.

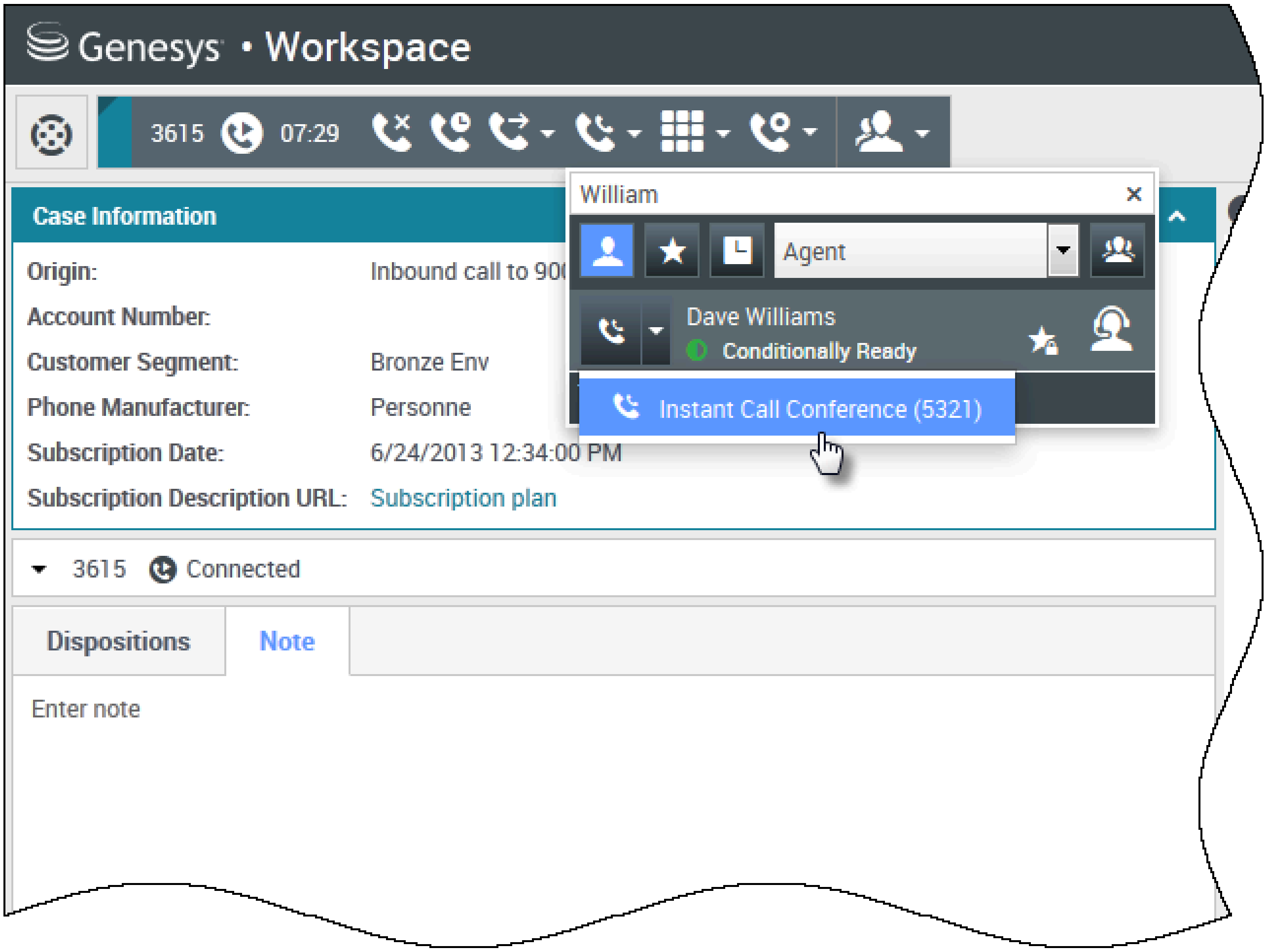
If your administrator has enabled this capability, you can enter the name of the agent group instead of the name of an agent when looking for a team member. Click the **Action Menu** drop-down list that is displayed next to the name of the agent group that you want to call.

Sometimes, no one in the agent group is available to take the call. If your administrator has set up Agent Desktop to display the number of available agents in the agent group, then you will see a message underneath the group name that tells you how many agents are available. If there are no agents available, you might have to wait to make the call.

Important

In some scenarios, the agent group availability information might be 10 to 30 seconds behind.

How do I start a conference?



Starting a conference allows you to add another person to your current call or chat. It's different from a consultation because the customer is also connected to the session.

 starts a conference when working in voice.

 starts a conference when working in chat.

Search your list of internal targets to find the person, agent group, routing point, interaction queue, or skill that you want to add and then select the conference channel you are requesting. The conference begins as soon as they accept the request. (When sending a conference request to an agent group, the agent availability information might be 10 to 30 seconds behind, so you might have to wait to see if an agent is available to join the conference.)

Some things to keep in mind:

- You can always consult with a team member before adding them to a conference.

- In a voice conference, the person you added can choose to release the call. This disconnects them from the conference, but your call with the customer continues.
- If you disconnect from the call but the person you added to the conference is still connected, the call continues without you. Your system might be set up to end the conference after you disconnect if the person that you added is not part of your company.
- Everyone connected to the conference can see or hear what the other parties are discussing, unless you remove or selectively mute a participant.
- Your account might be configured to remove a party from a conference. Select the **Party Action** menu on the Voice Interaction view and select **Drop from conference** to remove that party from the conference.

A team member can select **Leave** to drop from the conference.

How do I transfer an interaction to another team member?

Link to video

You can transfer a call, email, or chat to another team member instantly, or you can consult with them first. For example, you could put the current call on hold while you talk to another team member to see if they will accept the transfer.

 transfers a voice call.

 transfers a chat.

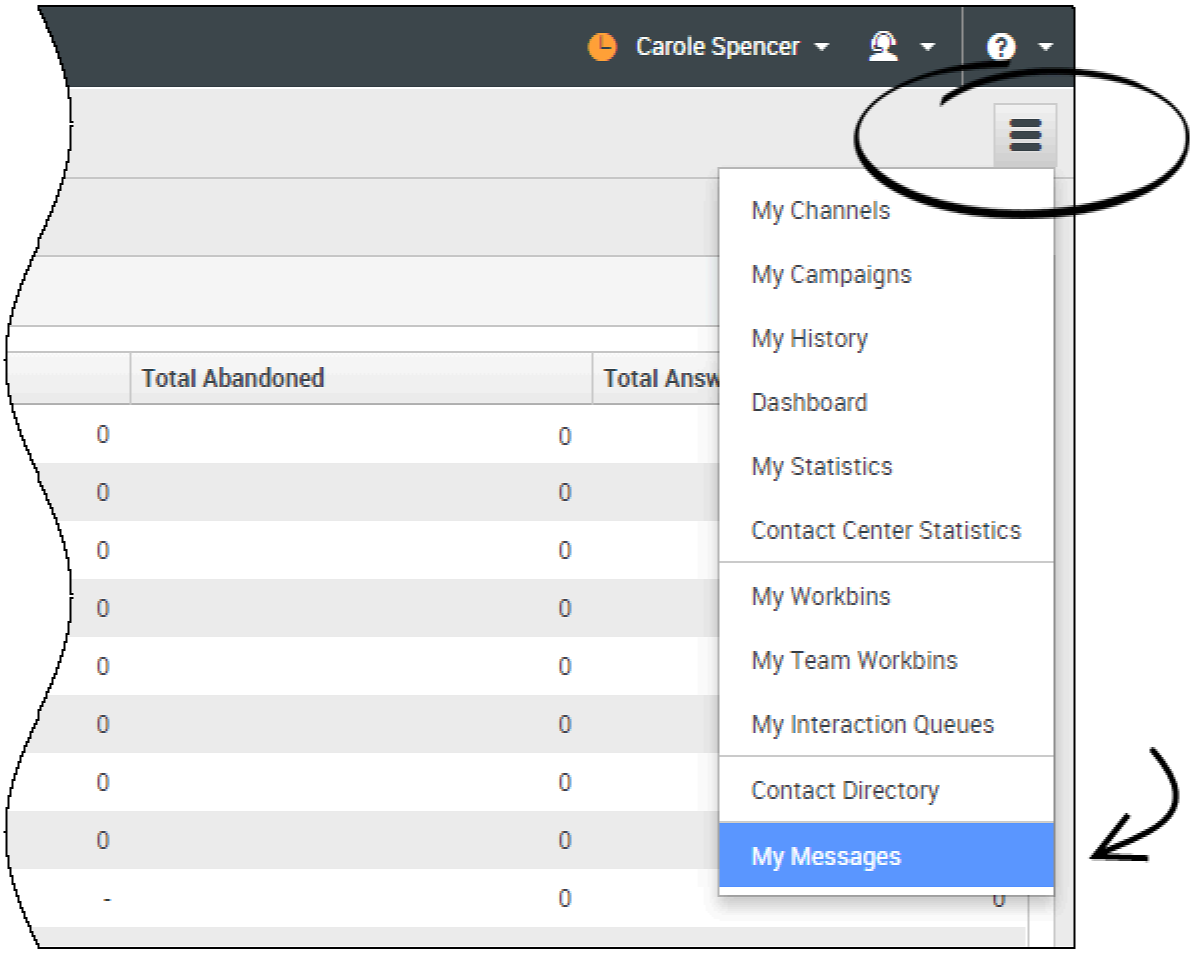
 transfers an inbound email.

Some things to keep in mind:

- Case information might be visible to you, the transfer recipient, or your administrator.
- If your transfer request is not accepted, you must manually take your contact off hold.
- If there are no agents available, you might have to wait to transfer the call. (When transferring to an agent group, the agent availability information might be 10 to 30 seconds behind, so you might have to wait to transfer if there are no agents showing as available.)

Watch the video to see how a transfer works.

How do I read my messages?



You might receive messages from the system or your administrator.

When a new message arrives, you'll see a preview notification (you might also hear a sound/tone play).

Common messages include:

- System-based messages (such as when a switch, channel, or contact server is out of service)
- Voicemails (if enabled)

You can view most messages on the **My Messages** page. In the Main View, click the **Access and use Agent Desktop supporting views** button (☰), then select **My Messages**. The most recent messages are displayed on top, with a color and a status to indicate the priority.

If you have voicemail messages, you'll see an indicator beside the mailbox, like this: 6.

To call your voicemail box select it from the **Supporting Views** menu (☰). A new internal interaction is launched. Use the keypad to enter your authentication information.

Tip: If you hover your mouse pointer over the message waiting indicator, you can see the number of messages in each of your voicemail boxes.

Outbound campaigns (v8)

As an agent, you might work on campaigns (for example, collections, telemarketing, or fundraising) where you make outbound calls to contacts. You can view and manage your campaigns from the **My Campaigns** tab.

What types of campaigns are available?

You might be working with one of the following campaign types:

- Preview campaigns, in which you manually request (or *pull*) a number to dial from the system.
- Progressive or Predictive campaigns, in which the system automatically sends you a number to dial.

Video Tutorial: Outbound Campaigns

Here are three tutorial videos that give you a quick overview of being an agent in an Outbound Campaign. The first video introduces Outbound Campaigns, the second demonstrates Predictive and Progressive (automatic) campaigns, and the third demonstrates Preview (manual) campaigns.

- Overview

[+] Show video: Outbound Campaign Overview

Link to video

- Automatic record retrieval

[+] Show video: Automatic Mode

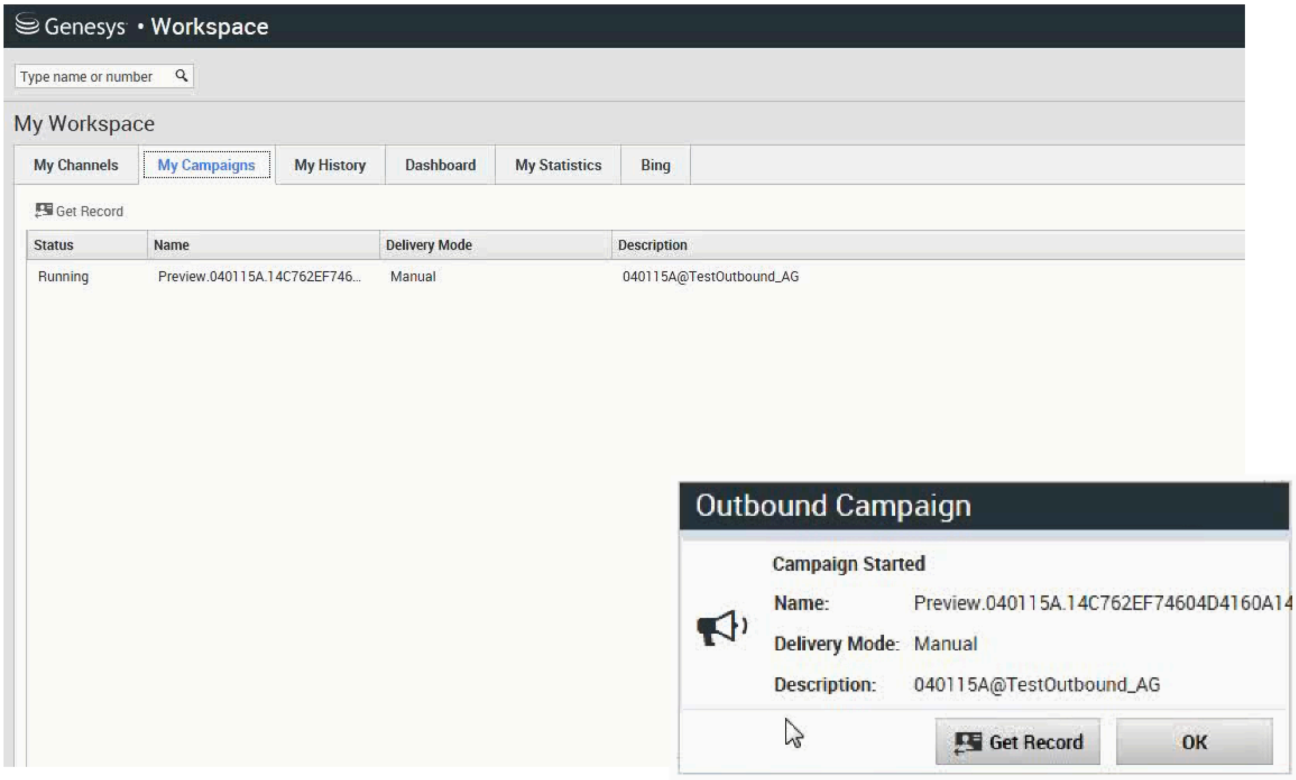
Link to video

- Manual record retrieval

[+] Show video: Manual Mode

Link to video

How do I work with Preview campaigns?



In campaigns using Preview dialing mode, you request a record from the system and then dial the contact. You can preview the case information and other details *before* you start the call. You must be in a **Ready** status to make calls.

You'll get a pop-up notification each time an administrator loads or starts a new campaign. When you get the Campaign Started pop-up, you can choose:

- **Get Record** to retrieve a contact record from the campaign list.
- **OK** to join the campaign. (With this option you'll have to retrieve a record manually. Go to **My Campaigns**, select the campaign you want to use, and select **Get Record**.)

When you have previewed the record, use:

 to call the contact. When the call is connected, you can monitor the call status and use the standard voice call controls to manage the call.

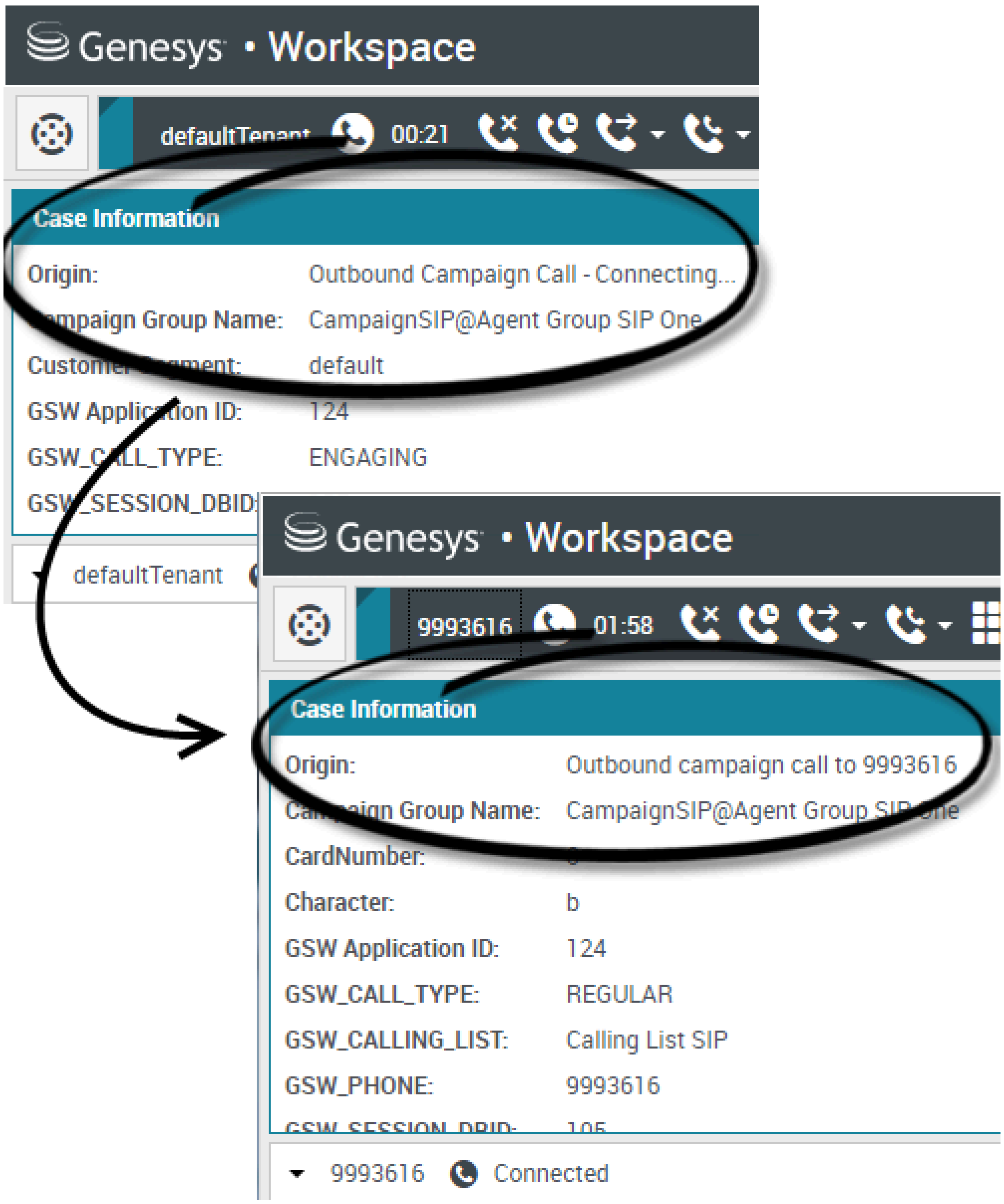
 to decline the record. You can then choose **Call this contact later** to return the record to the campaign list or **Do not call this contact** to remove the contact from the campaign list.

 to stop receiving previews (**Done and Stop**). To start receiving previews again, go to **My**

Campaigns, select the campaign you want to use, and select **Get Record**.

If asked, select the caller ID details you want to use.

How do I work with Progressive and Predictive campaigns?



In campaigns using Progressive and Predictive dialing modes, outbound calls are directed to your workstation and dialed automatically.

You'll get a pop-up notification each time an administrator loads or starts a new campaign. When you get the Campaign Started pop-up, click **OK** to join the campaign.

If your status is Ready, a new interaction preview appears. You can then **Accept** to connect the call, or **Reject** to return the record to the top of the calling list. If you do nothing, the interaction goes back to the top of the calling list.

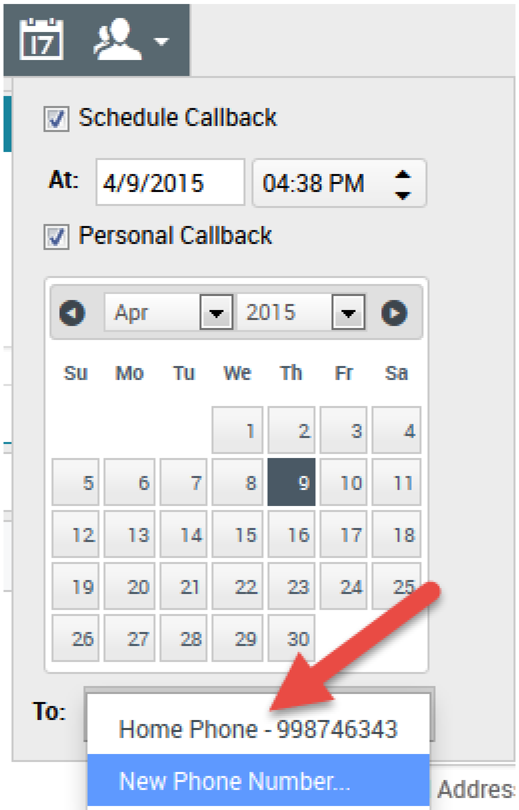
When you accept the call the contact or customer is not yet on the line. In the pop-up notification and in the call **Case Information** areas, you will see that the **Origin** of the call is `Outbound Campaign Call - Connecting...`

As soon as the person answers the phone and the call is connected, the **Origin** of the call changes to `Outbound campaign call to <name or number of contact>`. Information about the call might be added to the **Case Information** area.

When you're connected to the contact, you can view the campaign call information, the Call Status, and the available Call Actions. Use the standard call controls to manage the call.

Note: In some environments, you might not be connected to the outbound call until after the contact has answered the phone. In this case, you will not see that the **Origin** of the call is `Outbound Campaign Call - Connecting...`, instead it will immediately show you the name and or number of the contact.

How do I schedule callbacks for a campaign?



During a campaign, you might not be able to reach the contact or they might request to be called back at another specific date and time. You can schedule a callback at any time while you are handling an Outbound campaign call, even after the call has ended.

-  opens the **Schedule Callback** window, where you can set a date, time, and even a different phone number for the callback. You can also specify whether the callback is personal (you will handle the callback) or whether any available agent will handle the callback.

Tip: During Preview campaigns, you might be able to use this feature to postpone a preview call before the call is dialed.

When you've set the desired properties for the callback, the Schedule Callback button changes to  to indicate that a callback is scheduled. You can then end the call.

If you need to make changes to a scheduled call back, you can open the Schedule Callback window and make changes to the settings.

To cancel a scheduled callback, clear the **Schedule Callback** box. This must be done *before* closing the Outbound Record or the Interaction Preview.

When a rescheduled callback is directed to your workstation, an interaction preview is displayed as usual. The only difference is that the Case Information includes an indication in the **Origin** field that the call is a **Callback** or a **Personal Callback**.

Note: You might see an error message displayed in the Agent Desktop interface when you try to mark done an Outbound interaction that you have rescheduled. This can happen if the specified rescheduled date and time are invalid (for example, you might have set the rescheduled date and time in the past). You must fix any errors or cancel the reschedule first before you can mark the interaction done.

Navigating Agent Desktop (v8)

Having trouble finding your way around Agent Desktop? If you need help identifying a button or field, hold your mouse pointer over it to reveal a tooltip.

Do you use a screen reader? Do you navigate Agent Desktop using a keyboard? You can find out all about it here!

Main view

Link to video

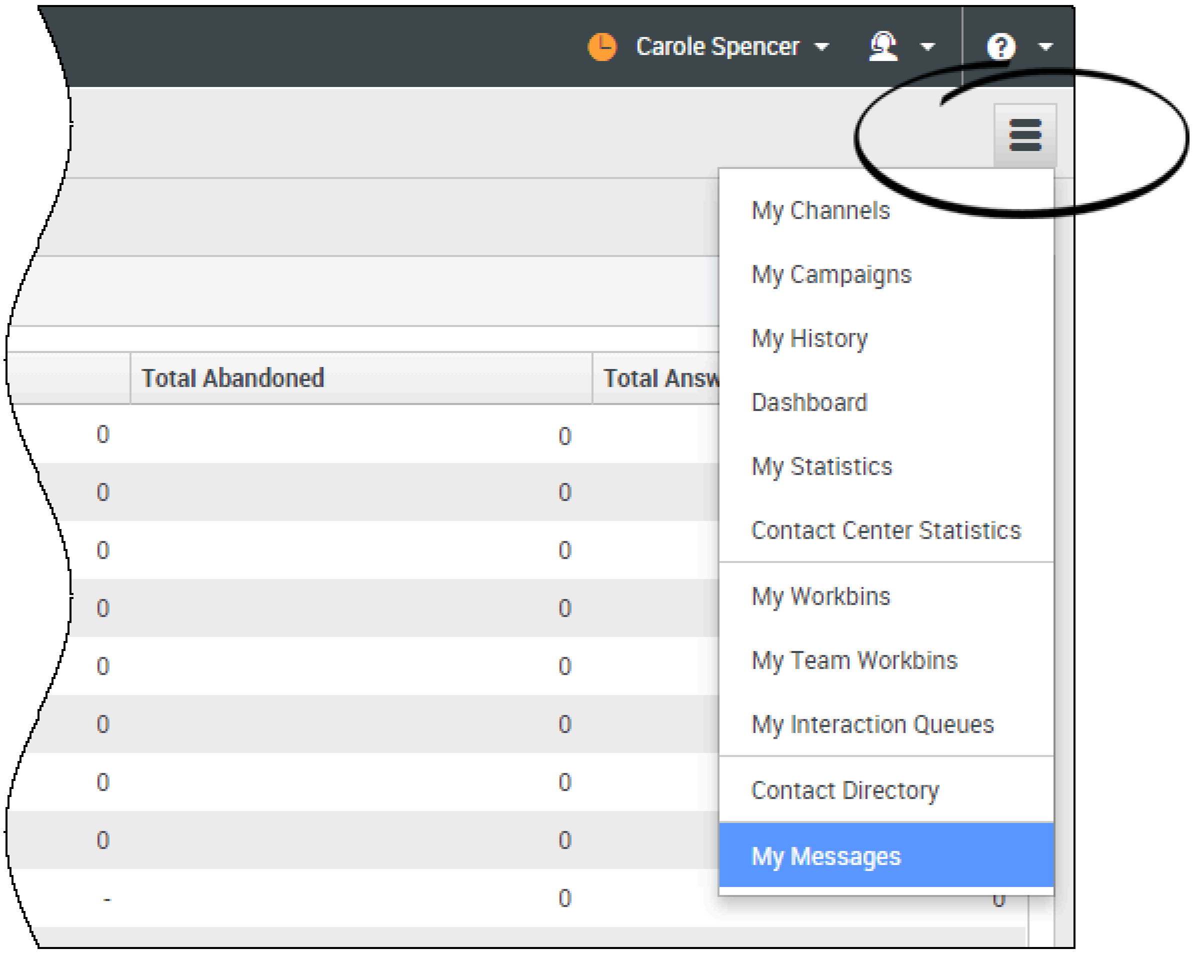
The main view lets you access the most common features that you use every day, such as managing your channels, campaigns, KPIs, workbins contacts/customers, and messages.

Some of the tabs include:

- **My Channels** — Set your status on individual channels, such as voice, chat, and email.
- **My Campaigns** — View and manage your Outbound campaigns.
- **My Statistics** — View your statistics (KPIs) and alerts.
- **Contact Center Statistics** — View the latest statistics and alerts for your contact center.

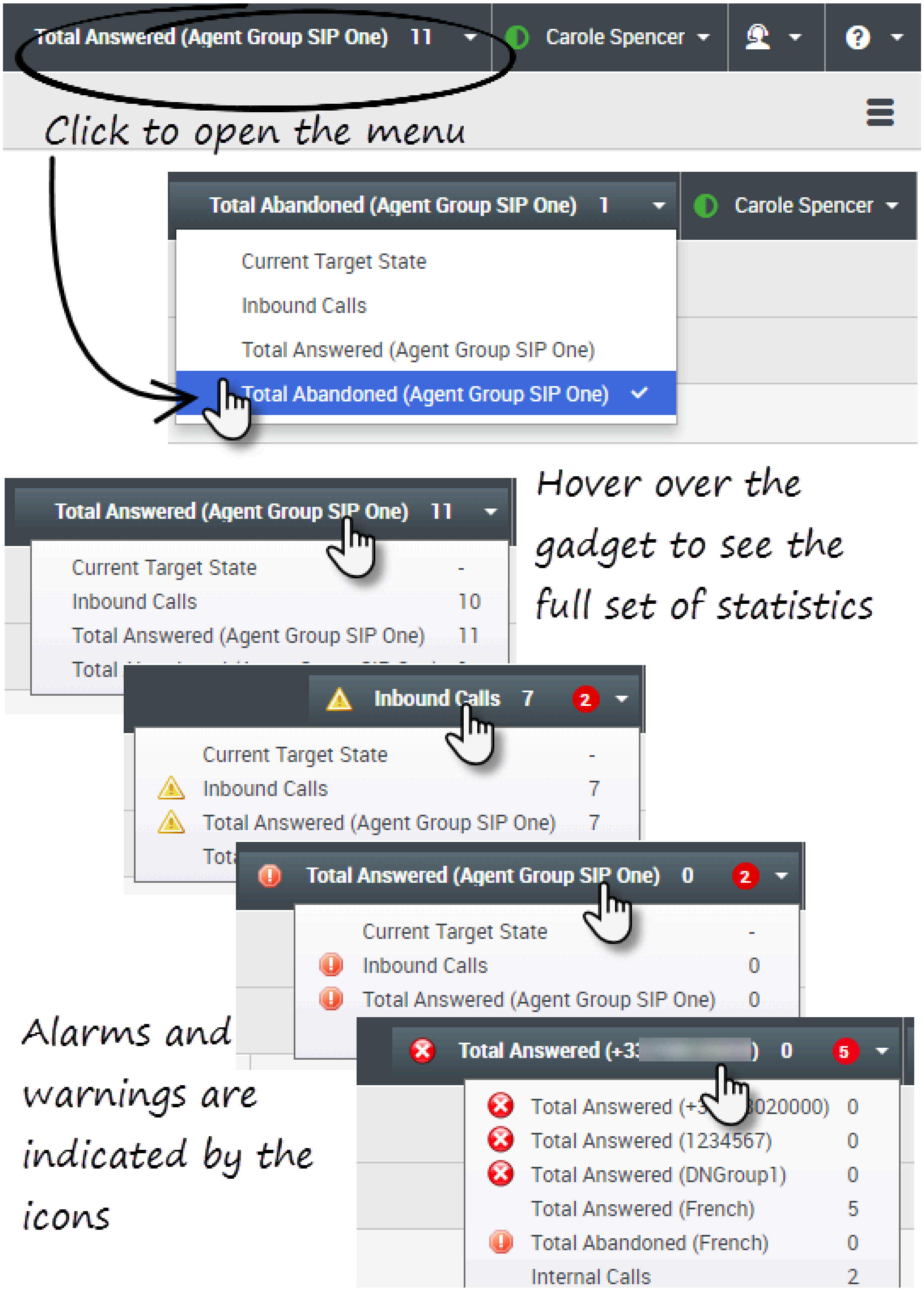
Watch the video for a quick tour of the Agent Desktop main view.

Supporting views



Use ☰ to access all of the views available to you, including returning you to the tab views.

Contact Center Statistics and KPIs



There are three places where you can view and track your performance and the performance of your contact center:

- The Statistics Gadget in the main menu bar
- The Contact Center Statistics tab in My Workspace
- The My Statistics tab in My Workspace

Note: Some or all of these features might not be available in your environment.

Statistics Gadget

The Statistics Gadget helps you to stay up to date on certain key statistics. Your administrator decides which statistics are available for you to view.

The Statistics Gadget displays one statistic at a time, giving you the current status of service level, number of calls waiting, number of calls you have handled, and so on.

Hover your mouse pointer over the Statistics Gadget to see the current values for all of the statistics that have been assigned to the gadget by your administrator.

The red circle with the number tells you how many alarms currently apply to the statistics being evaluated by the gadget.

If more than one statistic has been assigned to the gadget, click it to open a list of currently available statistics and select a different one to display. A check mark is displayed next to the current statistic.

Here are the icons that you might see in the Statistics Gadget, the Contact Center Statistics tab, and the My Statistics tab:

- A worst icon is displayed if the evaluation of the performance is the worst of your group ().
- An error icon is displayed if the evaluation of the performance is below the expected error level for the KPI ().
- A warning icon is displayed if the evaluation of your performance for the KPI goes beyond the expected warning level for the KPI ().

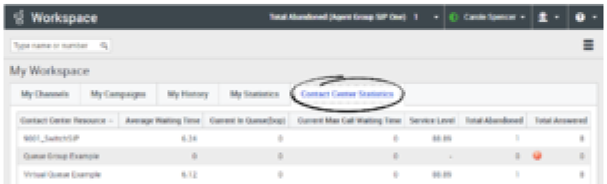
To see all of the statistics available for your contact center or for yourself (all your KPIs), click the appropriate tab in My Workspace. You can also choose these tabs from the Available Views () menu.

Contact Center Statistics tab

The items displayed on this tab are statistics for Routing Points, Queues, and other contact center fascilities.

The Contact Center Statistics tab displays statistics that summarize the state of various conditions, such as waiting time, calls in queue, average maximum waiting time, service level, and answered and abandoned calls, that are monitored by your contact center.

Click the **Contact Center Resource** column head to change the sort order of the resources.

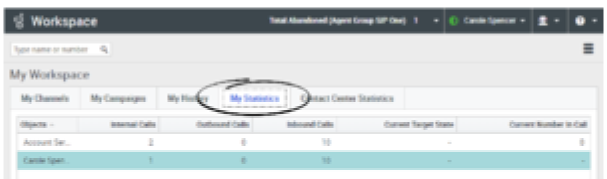


My Statistics tab

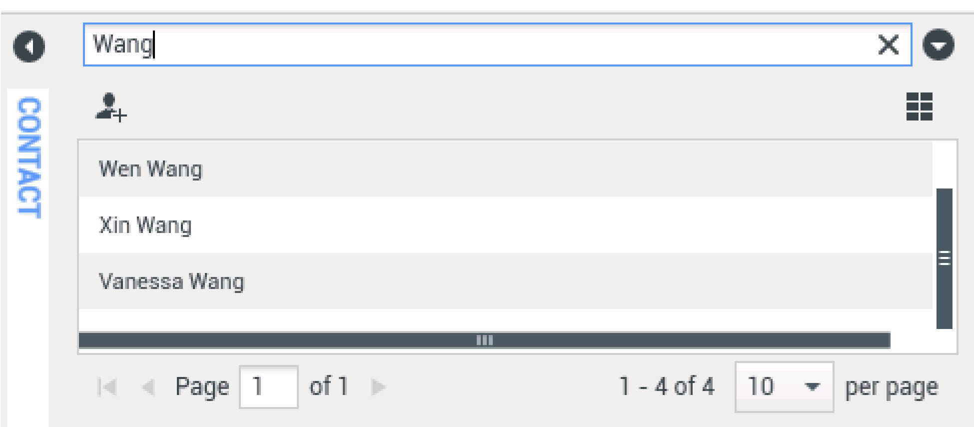
This tab displays the list of your Key Performance Indicators (KPIs).

The KPIs that are displayed are set up by your system administrator. The statistics might be for your agent group rather than for you personally.

Click the **Objects** column heads to change the sort order of the KPIs.



Quick Search



In the Quick Search field, you can enter the name or other information, such as a phone number or email address, of a contact, then click the magnifying-glass icon to begin the search of the contact database.

Chronology slider

The chronology slider lets you search the contact history for interactions that took place within a certain time period. The slider has four positions:

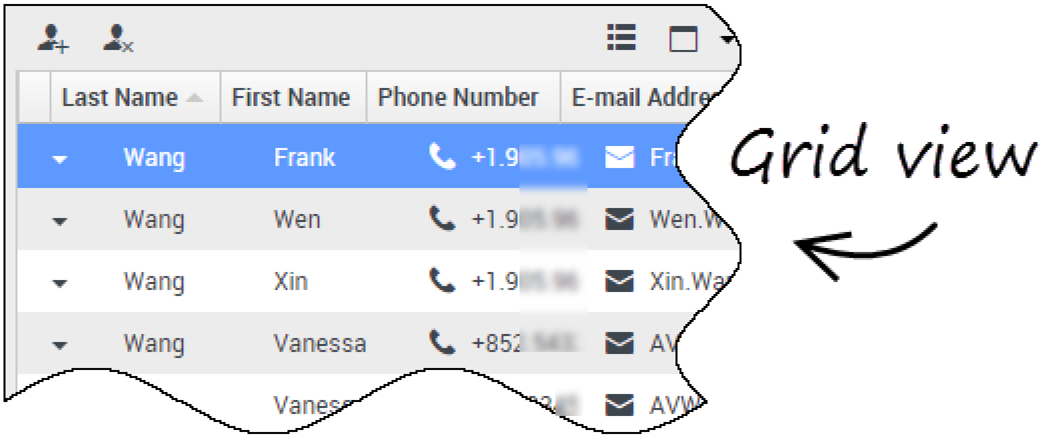
- **All**—Search the entire database from the most recent interaction back to the earliest interaction
- **Last Month**—Search the database from the most recent interaction back to one month ago
- **Last Week**—Search the database from the most recent interaction back to one week ago
- **Last Day**—Search the database from the most recent interaction back to one day ago

Page controls

Page through the list of search results by doing any of the following:

- **Go to the Next Page** (▶)
- **Go to the Previous Page** (◀)
- **Go to First Page** (|◀)
- Specify the number of items that are displayed on each page by using the **per page** drop-down list.

List and Grid views



The List view displays an unsorted list of all of the contacts in the contact database that match the search criteria.

Grid mode 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.

Show/Hide panel details

The **Show Details Panel on Bottom/Hide Details Panel** button ( ) enables you to specify how the Details panel is displayed. The details panel can be shown or hidden, and, when shown, can be displayed below or to the right of the window.

Click the **Show Details Panel on Bottom/Hide Details Panel** button to choose one of the following views:

- —Displays the Details panel below the workspace area.
- —Hides the Details panel.

Interaction Bar

The Interaction Bar is displayed in the main view whenever you have one or more active interactions. If you have multiple active interactions, only the tools for the current active interaction are displayed. The toolbar for other active interactions collapse until you click them to make them current.

Each interaction is represented by a control bar. You can use the control bar to perform basic actions that are specific to the interaction type, such as ending a call.

- Click the control bar for an interaction to give it the focus. All other open interactions are collapsed to the Interaction Bar.
- Click the small colored bar on the left of the interaction control to toggle between pinned mode and floating mode. In floating mode, other open views appear dimmed behind the interaction view.

Entries in the Interaction Bar flash (or blink) when specific events occur that might require your immediate attention.

Tip: To allow for the maximum space in the Interaction Bar, when you are handling an interaction, the Team Communicator is reduced to a button.

Team Communicator

Link to video

Team Communicator lets you find someone in your company's internal directory (such as a team member, a routing point, or an agent group), and sometimes someone outside your company, such as an external resource person or even a customer contact. It's useful for getting help or consulting with someone while working with an interaction.

To start a call or email interaction, just click in the Team Communicator search field and start typing a name, number, or email address.

You can also filter the search results:

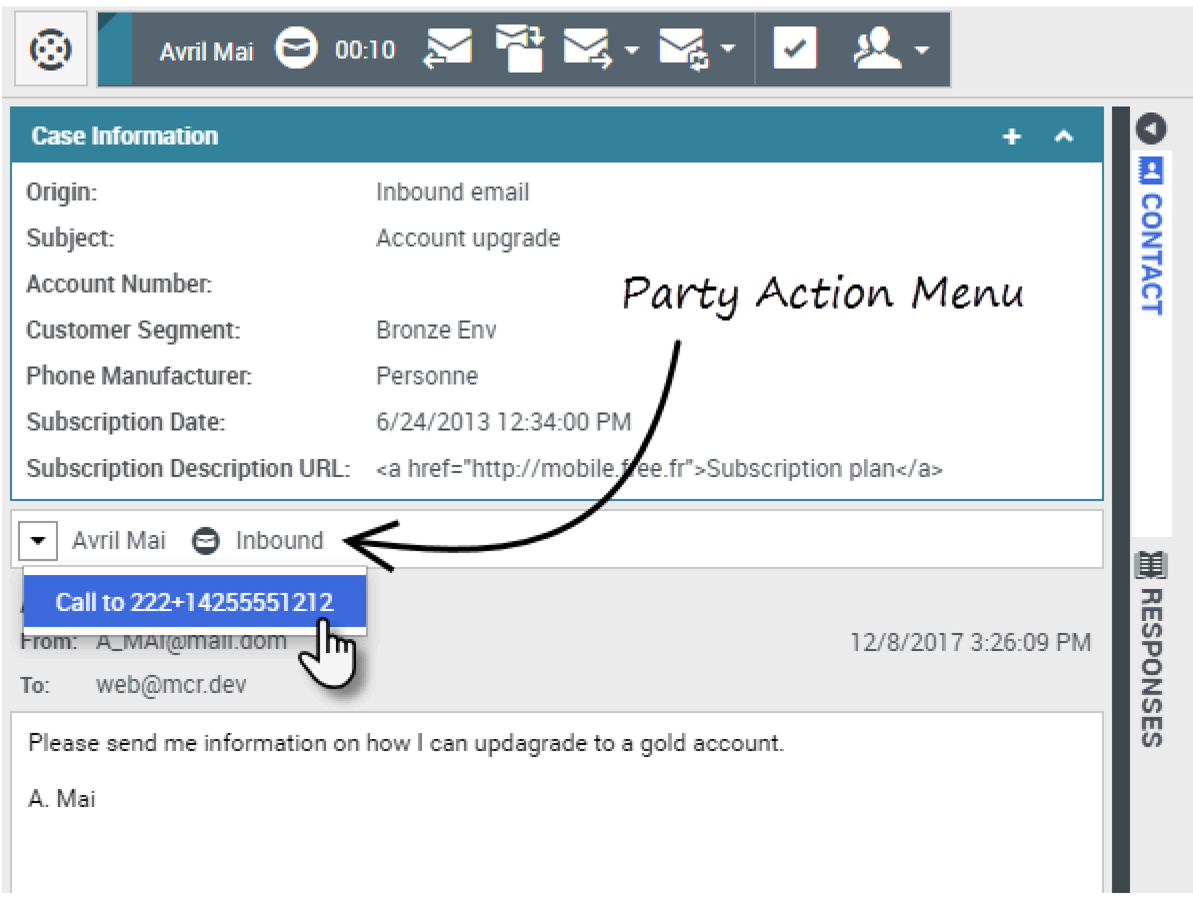
-  to search all contacts
-  to search your favorites
-  to search recent contacts
-  to group (or ungroup) your results by category or type

If you miss a call, the clock button changes to orange, like this: . Click it to display any missed calls. If you hover your mouse pointer over the contact entry, a tooltip displays the missed call information, including date, time, and known contact details.

Tip: When you close the Team Communicator, or if you switch the filter to All contacts or Favorite contacts, the **Recent** button changes back to white if you have viewed your recent and missed calls, or if you have called back all of your missed calls.

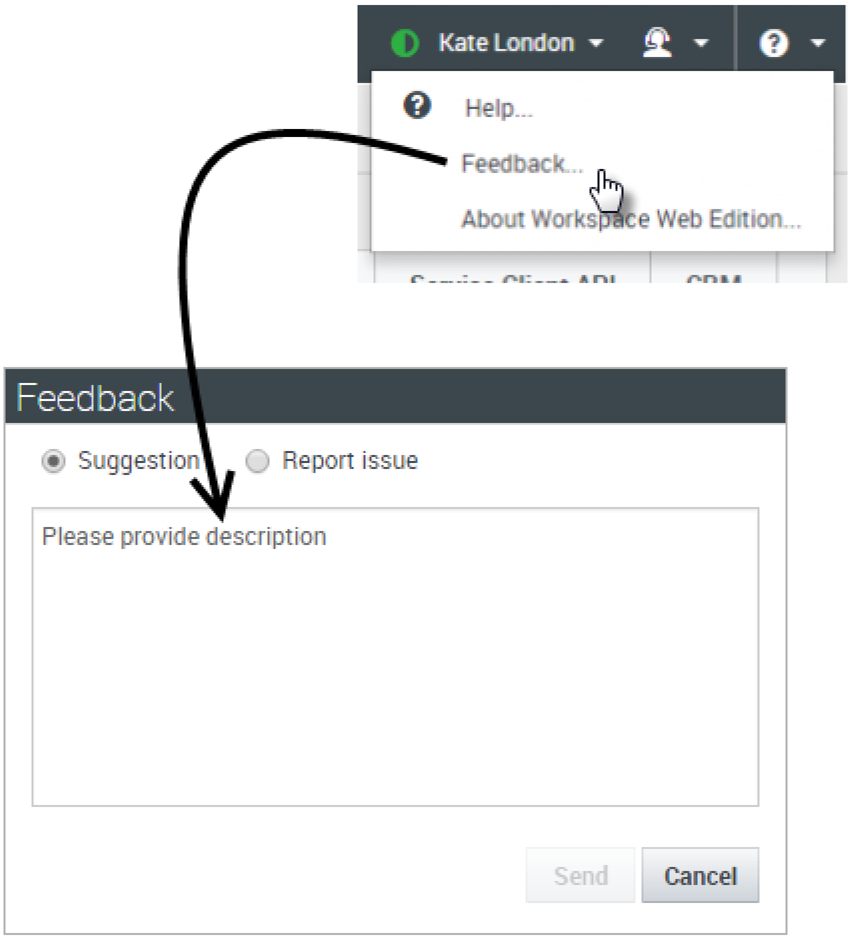
Watch the video for a short demonstration of how to use Team Communicator.

Party Action menu



The **Party Action** menu is a part of every interaction. You can use it during an interaction to launch a secondary interaction. For example, while you are handling an email interaction from a contact, you can use the **Party Action** menu to call the contact if their phone number address is stored in your corporate database.

How to provide feedback when something goes wrong



Sometimes web-based applications don't work as expected. There might be network connection issues, or the system that sends you phone calls, emails, and chats might be slow or behaving in odd ways. Sometimes the sound quality of a phone call is bad. Sometimes an error message is displayed on your desktop.

These and other issues are problems that you should report to your supervisor. Open the **Help** menu and select **Feedback** to open the **Feedback** window. Choose the type of feedback that you want to give, either a suggestion or to report an issue, describe the problem or suggestion by typing in the text box, then click **Send** to submit your feedback. This information, along with logs about what you were doing in your most recent Agent Desktop session, are sent to Genesys and are available to Customer Care for later reference.

If for some reason Agent Desktop becomes disconnected from your network and you have to close your browser and launch a new one to log in again, Agent Desktop automatically opens the **Feedback** window to let you write a report about the disconnection problem immediately.

After you complete a feedback report, please tell your supervisor about it. He or she might want to call Genesys Customer Care about the problem and will be able to refer to the feedback you just submitted.

Keyboard navigation and accessibility

Agent Desktop lets you navigate the interface entirely by keyboard. This means that you don't have to use a mouse to activate different features or select buttons.

It also means that you can use a screen-reader application to perform all the functions you need.

Whenever an event happens in Agent Desktop, like you get a new interations or an error message is displayed, Agent Desktop makes a sound to alert you.

All the different ways that you can use the keyboard and a screen-reader to move around are described in this section.

Agent Desktop lets you use keyboard shortcuts combinations for some common actions. Ask your administrator for a list of the shortcuts that are set up for Agent Desktop.

Shortcut key combinations

A shortcut is a combination of keys that you press to make something happen in an Agent Desktop window.

OS shortcuts

The computer operating system also has shortcut keys to let you copy, cut, paste, undo, delete, find, maximize window, minimize window, open menu and select command, switch application, cancel, change focus, and so on. Consult your operating-system documentation for a list of supported keyboard shortcuts.

Agent Desktop shortcut keys

Agent Desktop supports three shortcut key combinations that you can use to make you more productive. These are the default shortcuts (your administrator might have set up different shortcuts for you):

- **Alt+N** — Jump to the next interaction if you have multiple interactions open
- **Alt+B** — Jump to the previous interaction if you have multiple interactions open
- **Alt+L** — Jump to the last error message that you received

Keyboard navigation

Agent Desktop supports keyboard navigation for all features, functions, options, and menus.

If you do not use a mouse or if you are using a device for accessibility that needs keyboard navigation, you can still use all the Agent Desktop features. Many *expert users* prefer to use keyboard navigation to maximize productivity.

Colors and appearance change as you select different items on the Agent Desktop. For example, buttons change color and menus open with the current selection highlighted by color.

Basic navigation using the TAB key

The simplest way to navigate by keyboard is to use the **TAB** and **SHIFT+TAB** keys.

- **Tab**—Moves your focus to the next menu, field, button, view, and so on.
- **Shift + Tab**—Moves your focus to the previous menu, field, button, view, and so on.

Movement occurs from left to right and from top to bottom, unless the ordering of components dictates otherwise. Navigation moves from component to component within a view, and from view to view within the application.

Navigation Shortcuts

This table shows you the keyboard shortcuts that let you control Agent Desktop without using a mouse.

Agent Desktop keyboard shortcuts

Shortcut	Description
Left Arrow	• Move left in a menu bar or out of a submenu. • Move to the next tab on the left. • Move left in the history slider.
Right Arrow	• Move right in a menu bar or out of a submenu. • Move to the next tab on the right. • Move right in the history slider.

Shortcut	Description
Up Arrow	Move up in lists and menus.
Down Arrow	Move down in lists and menus.
Alt+Down Arrow	Open a selected drop-down list.
Enter	For a modifiable list, apply the edit mode, or validate the modification. For a button, execute the associated action. For a menu item, execute the associated action.
Space	For some controls, select or clear the check box that has the focus.
Escape	For a modifiable list, cancel the edit mode.

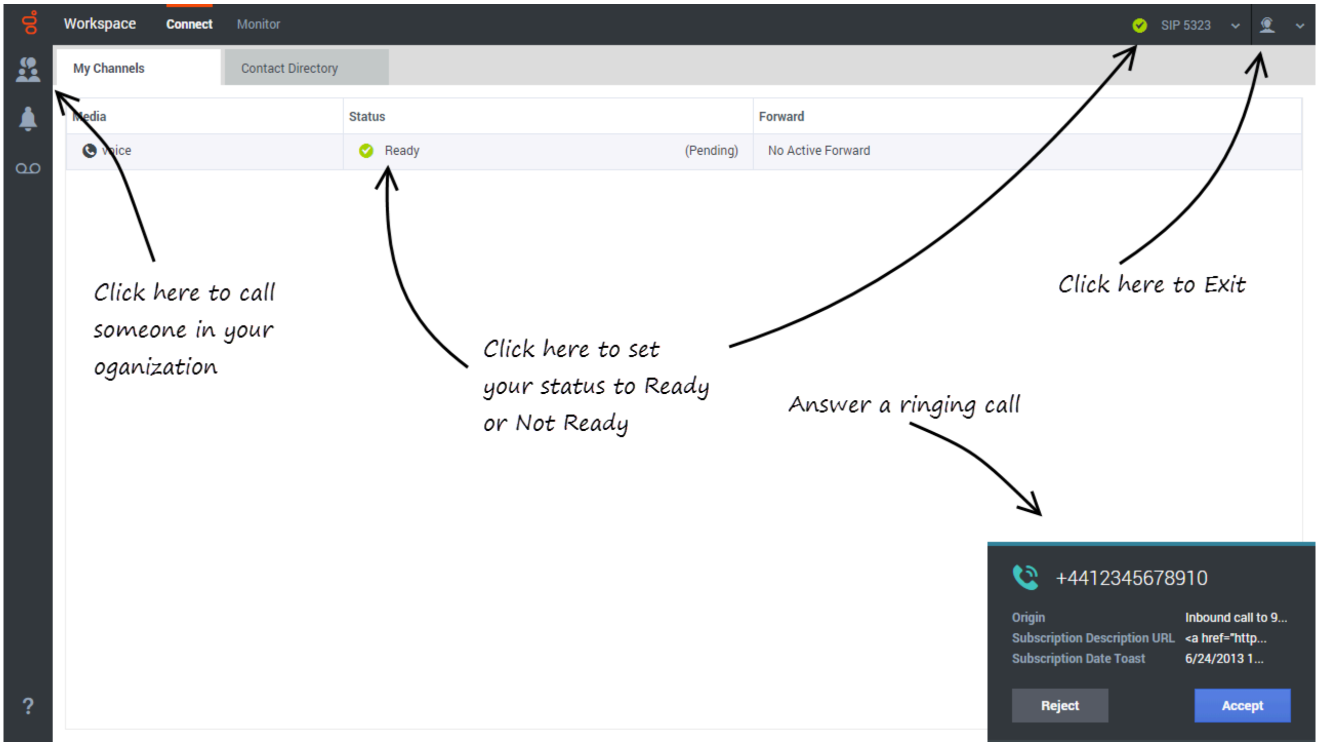
Agent Desktop (v9)

> **Important**
>
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Agent Desktop (v9).

Agent Desktop lets contact center agents communicate with customers and team members through phone calls and Genesys Digital channels.

> **Important**
>
> - Due to continual changes to Agent Desktop, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you see in the product when you use it.
> - Some Workspace Agent Desktop features are available only for Genesys Engage cloud users.
> - Some Workspace Agent Desktop features are available only for Genesys Engage on-premises users.

If you are looking for the Agent Desktop v8 help, it is here.



Link to video

You can

- respond to or contact customers through the voice and Genesys Digital channels
- get help from team members
- make sure that you are meeting your center's expectations (Statistics and KPIs)

Ready? Watch the video for a quick tour of Agent Desktop, and then get started.

Lost? See Navigating Agent Desktop.

Looking for answers to specific questions? Try these topics:

- Customer interactions
- Internal interactions
- Channels

Are you a **supervisor**? You can monitor agents, calls, and chat interactions.

About This Help

The following topics explain some of the main features of Agent Desktop:

About Agent Desktop

- How to navigate Agent Desktop
- How to use Agent Desktop
- How to login to Agent Desktop
- Watch "How to" videos
- View Contact Center Statistics and Your KPIs

Voice and Digital Interactions

- Call interaction features
- How to handle a call
- Inbound Chats
- Inbound and outgoing email
- In-progress and saved email
- My Workbins

Call Tasks

- Conference Calls
- Transfer Calls
- Consultation Calls
- Recording Calls
- Calling inside your organization
- Calling an Agent Group

Managing Your Status and Communications

- Manage your status
- Launch new interactions
- Manage your channels

Managing Contacts

- The Contact Directory
- Finding Contacts
- Contact Interaction History
- Manual Contact Assignment

Managing Interactions and History

- Interaction Search
- My Interaction History

Customer Journeys

Use Co-browse to guide your customer's journey

Use Altocloud to track your customer's journey

Frequently Asked Questions (FAQ)

How do I change password?

- If this is your first time logging on, you might have to change your password. This happens automatically. A message box is displayed that walks you through the steps. If you are not sure about any of the prompts, your administrator or supervisor can provide you with the details.
- If you need to change your password, send a request to your supervisor requesting a change password email. You supervisor will reset your password, and you will receive a confirmation email. Follow the instructions in the email to change your password.

What happens when I lose connection?

Sometimes network issues can cause Agent Desktop to lose connection to the system. Don't worry, see the Handling a system disconnection article to find out what to do!

Browser specific notifications and issues

Some browsers require specific actions to ensure that you receive notifications from Workspace Agent Desktop and the Genesys system. For detailed information about allowing notifications for your browser, review the documentation specific to the browser and version that you are using. The following are some guidelines:

- **Chrome**: When you login , you might see a browser notification asking whether to allow or deny notifications from the Workspace Agent Desktop URL. Click **Allow**.
- **Firefox up to v71**: When you login , you might see a browser notification asking whether to show notifications from the Workspace Agent Desktop URL. Click **Show for this session** or **Always show**.
- **Firefox v72 and higher**: When you login, you might have to click the **Notifications** icon in the address bar to display the dialog that enables you to allow notifications. You are not prompted to do this by the browser.
- **Edge**: When you login, you might see a browser notification at the bottom of window asking whether to show notifications from the Workspace Agent Desktop URL. Click **Yes**.

Log in, log out, log on, log off, and exit, what's the difference?

You log in and log out of the Workspace Agent Desktop application. Logging in means launching the application in your browser and identifying yourself to the system so that you become authorized to receive interactions and use the various features that are enabled for you.

Typically, you log in to Workspace Agent Desktop at the beginning of your shift and log out (Exit) at the end of your shift. To log out of Workspace, you must use the **Exit** option from the menu in the upper right-hand corner. You won't be able to log out if you have any active calls or interactions.

You log on to and log off of channels in Workspace Agent Desktop. Channels include voice, email, chat, and so on. Channels are the media that you use to interact with contacts. When you log in to Workspace Agent Desktop, you are usually logged on to all the channels assigned to you, and when you log out (exit) of Workspace Agent Desktop, you are logged off from all the assigned channels. In some environments, you might be logged off from one or more channels when you log in because the channel is out of service or your administrator has set up your account to be logged on to specific channels only.

Use the **My Channels** tab to log on or log off one or more channels. Logging off of all your channels does not log you out of Workspace Agent Desktop. You must still exit the application to log out.

You can log on or log off all your assigned channels by using the Global Status menu.

I keep clicking Hang up (release call) by accident

In some environments, there is no confirmation dialog after you click **Hang up**. That means as soon as you click **Hang up** the call ends. If you find that you are accidentally hanging up on customers when you intend to only put them on hold or transfer the call, ask your supervisor or administrator to set the **voice.prompt-for-end** Workspace option to **true** to resolve this issue.

What are Skills?

- Skills are things that you are good at, like product specialization or a language that you speak.
- When your supervisor sets up your account, she or he assigns skills and skill levels based on what you can do.
- Skills are used to direct calls to you. If someone calls about a product that you are specialized on, the call will be directed to you and others with the same skill on that product.

How can I find my Call Stats?

- Use the Performance Tracker to see your call activity, worktime, and other reports.
- Use the Dashboard tab to see the list of statistics about the Routing Points, Queues, and other contact center objects.

How do I transfer, conference, or consult on my call?

Agent Desktop lets you start a conference call with someone in your company, transfer your call to another agent or your team lead, or start a consultation call with another member of your team. The call controls at the top of the voice call interaction toolbar open the Team Communicator, a universal lookup tool, that lets you search for and dial other team members. You can also use the Team Communicator to call someone inside your organization.

How do I call back a contact?

You can also use the **Party Action** menu or Team Communicator to call back the contact if you become disconnected.

What kind of calls and interactions does Agent Desktop let me handle?

- Agent Desktop handles inbound voice calls, Outbound calling campaigns, and Digital Channels: chat, email, social media, and more.

What if the wrong contact is assigned to an interaction?

- Agent Desktop might be set up to let you change which contact an interaction is assigned to. Sometimes when a new call or chat comes in, Agent Desktop does not assign it to the correct person in your contact database. Use the **Change Contact** button to pick a different contact.

What if the contact information is anonymous?

In some call centers, voice interactions are anonymous to protect contact Personally Identifiable Information (PII). If you do not assign a contact to an anonymous call, the call is not stored in the contact database and so is not available in any History view. In some contact centers, a routing strategy is used to assign a contact ID to an anonymous contact. In this case the call is available in the **My History** view; however, if you select a call from an anonymous caller, the contact name and phone number are displayed as **Anonymous** in the **Details** tab. You cannot call an anonymous contact.

I'm a Team Lead, what can I do with Agent Desktop?

- Agent Desktop has special features for those of you who are Team Leads and Supervisors. You can:
  - Monitor calls and chat (silently listen in)
  - Coach calls and chat (whisper coaching)

- Barge-in to calls and chat (joining the call)

Supported browsers

You can use any of the following browsers to run Agent Desktop:

- Chrome 75+
- Firefox 68+
- Firefox ESR 60.9
- Microsoft Internet Explorer 11
- Microsoft Edge

What next?

- Getting started
- Watch "How to" videos
- Navigating Agent Desktop
- Calls

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

Introducing Agent Desktop 9

> **Important**
>
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Introducing Agent Desktop 9.

A guide to some of the changes in the user interface if you are a user who is transitioning from the previous version.

> **Important**
>
> Some Workspace Agent Desktop features are available only for Genesys Engage cloud users.

Introducing Workspace Web Edition 9, Genesys' next generation Agent Desktop. Built on top of highly scalable cloud architecture, Workspace Agent Desktop 9 user interface has been updated with a new modern look and feel incorporating numerous usability improvements while maintaining the same features from the previous version.

Link to video

Known Limitations

When you migrate from Agent Desktop 8.5.2 to Agent Desktop 9.0.0, the following data is not carried over:

- Personal favorites
- Recent contacts
- Missed calls

If you use Genesys Screen Recording with Workspace Agent Desktop 9, you must have GSRS 8.5.360.03 or higher installed on the agent workstation.

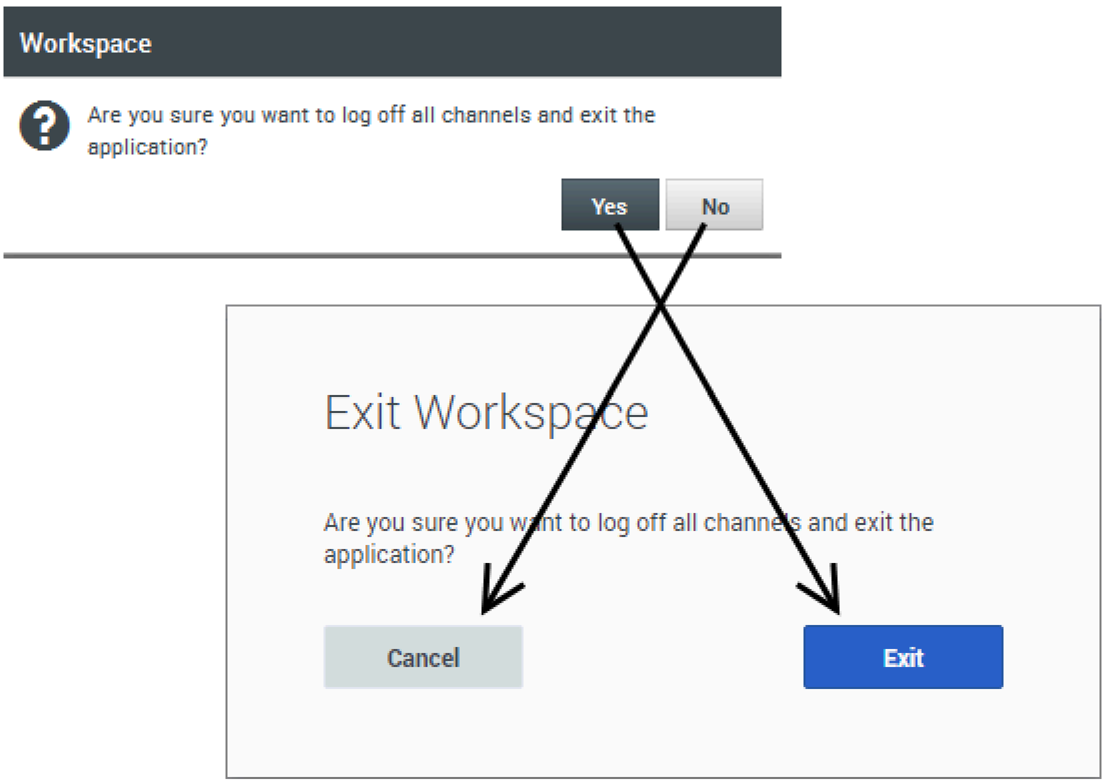
Agent Desktop requires Genesys Softphone version 8.5.401.03 or higher.

Logging in

Logging in to Workspace Agent Desktop is now a two-step process. After you open Agent Desktop, you must enter your username in the **Login** window. Do not enter your password in the **Tenant** field! If your contact center uses tenants, you will be told by your administrator what to enter here. If it does not, leave this field blank.

To enter your password, click **Next** to progress to the **Password** window. Enter your password and click **Sign in**.

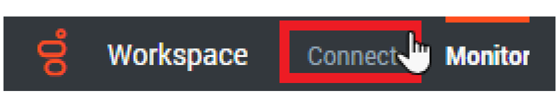
Logging out (exiting)



Logging out of Workspace Agent Desktop has not changed. You still select **Exit** from the **Agent** menu. However, there is a *GOTCHA* in the new Workspace Exit window... the button names have changed and they are in a different order!

Click **Exit** (the button on the right) instead of **Yes** to exit. Click **Cancel** (the button on the left) instead of **No** to stop existing and return to Workspace Agent Desktop.

The Navigation Bar



Workspace Agent Desktop 9.0.0 introduces the Navigation Bar so that you can have access to all the features that you use every day just by clicking a tab. You no longer have to click the hamburger menu to open different work views such as **My Channels** and **My Workbins**.

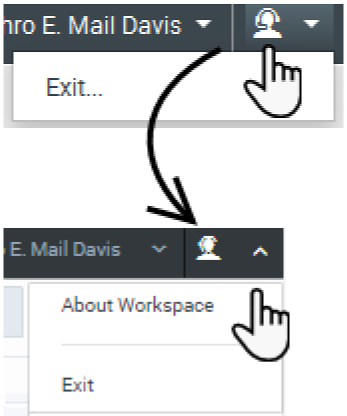
Most of the features you are looking for are in the **Connect** group. Click on it to access your work views.

The **Monitor** group contains **Contact Center Statistics**.

The Side Bar

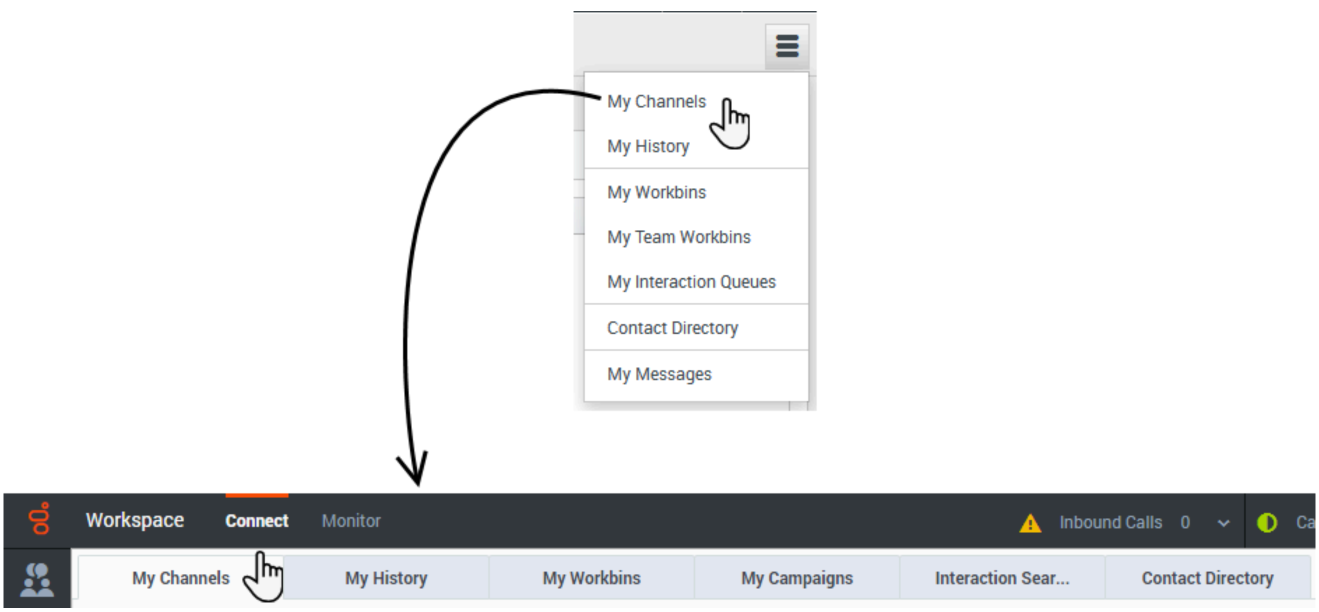
The Side Bar did not exist in Agent Desktop 8.5.2. It is a new feature for Agent Desktop 9.0.0. The Side Bar is where you will find Team Communicator, Notifications, Performance Tracker (formerly **My Statistics**), and product Help. If your account is enabled for Voicemail, it's here too.

The Agent menu



You still use the **Agent** menu to exit Workspace Agent Desktop. Click it and select **Exit**. You can now access the **About** window from this menu instead of the **Help** menu to get information about the version of Agent Desktop that you are using.

Your working views



In Agent Desktop 8.5.2 you had to open the **Main Menu** (the hamburger menu) to access the different work views. In Agent Desktop 9.0.0 all these view are now visible as tabs in the Main view. Just select **Connect** in the Navigation Bar and you will see the following tabs:

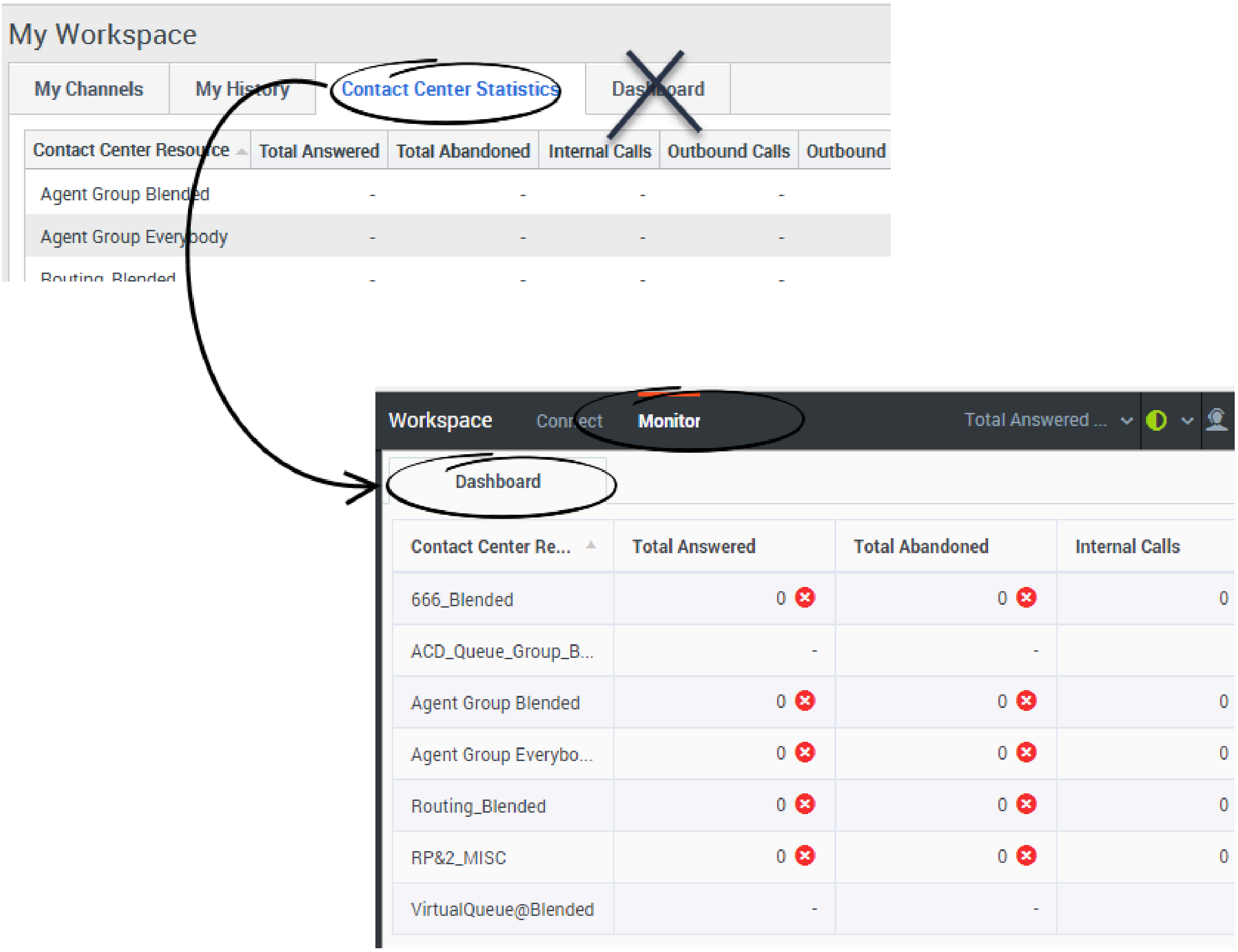
- My Channels

- My Campaigns
- My History
- My Workbins (including My Team Workbins and My Interaction Queues)
- Interaction Search
- Contact Directory

> **Tip**
> Some of these views might not be available to you. It depends on how your administrator has set up your account.

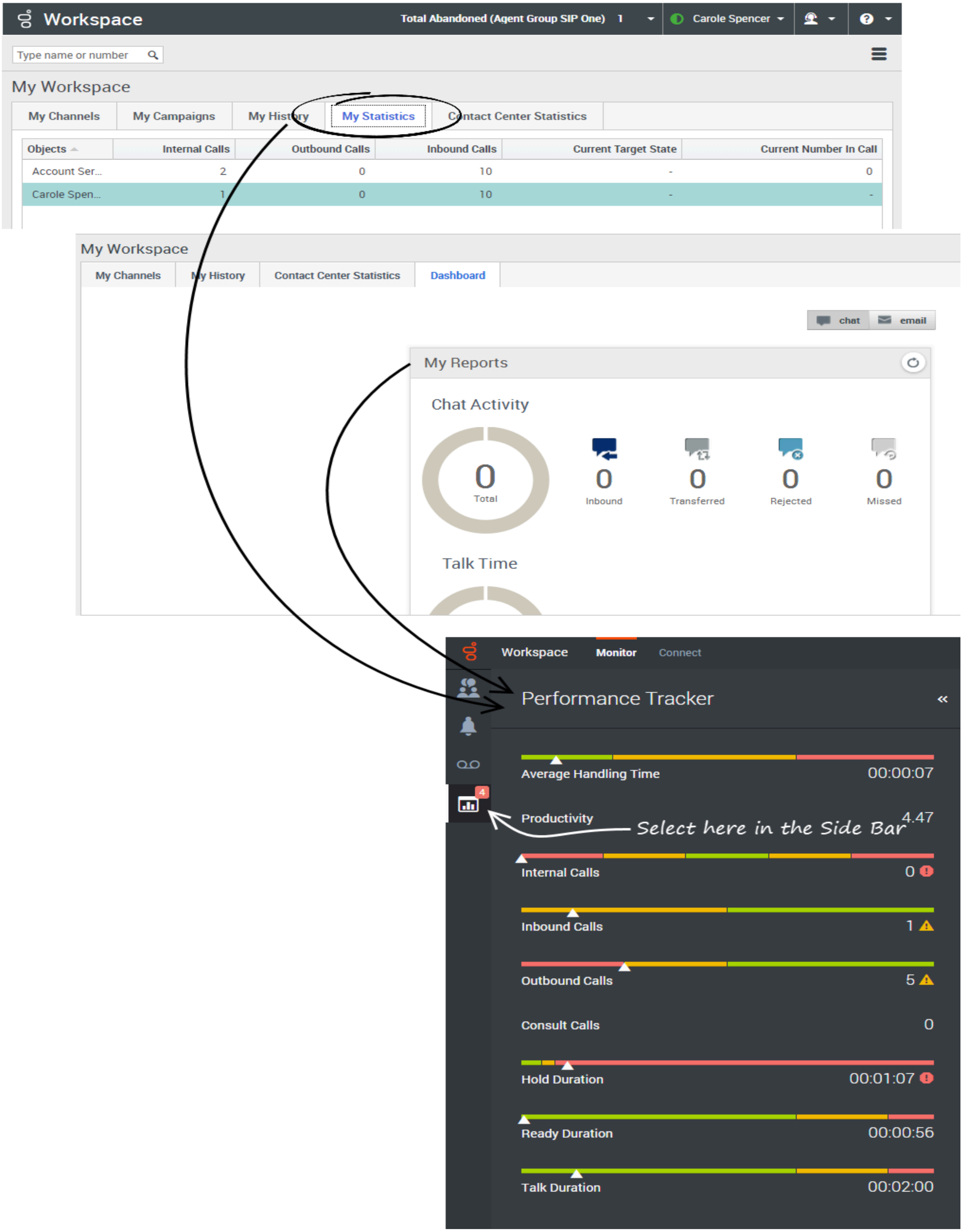
My Messages is now accessed by using the Side Bar.

Contact Center Statistics



In Agent Desktop 8.5.2, you accessed Contact Center Statistics in a dedicated tab in the **My Workspace** view. In Agent Desktop 9.0.0, Contact Center Statistics are found in the **Dashboard** tab of the **Monitor** group in the Navigation Bar. The statistics, alerts, warnings and so on are all the same as in Agent Desktop 8.5.2.

No more My Statistics or My Reports dashboard

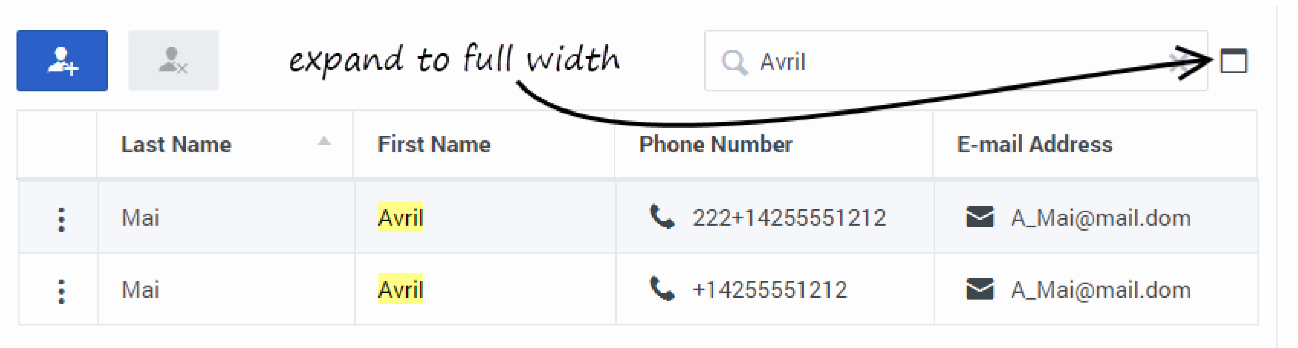


Workspace
Total Abandoned (Agent Group SIP One) 1
Carole Spencer
Type name or number
My Workspace
My Channels
My Campaigns
My History
My Statistics
Contact Center Statistics
Objects
Internal Calls
Outbound Calls
Inbound Calls
Current Target State
Current Number In Call
Account Ser... 2 0 10 - 0
Carole Spen... 1 0 10 - -
My Workspace
My Channels
My History
Contact Center Statistics
Dashboard
chat
email
My Reports
Chat Activity
0 Total
0 Inbound
0 Transferred
0 Rejected
0 Missed
Talk Time
Workspace
Monitor
Connect
Performance Tracker
Average Handling Time 00:00:07
Productivity 4.47
Select here in the Side Bar
Internal Calls 0
Inbound Calls 1
Outbound Calls 5
Consult Calls 0
Hold Duration 00:01:07
Ready Duration 00:00:56
Talk Duration 00:02:00

The **My Statistics** tab and the **Dashboard** tab that you used to view your KPIs have been replaced by an all new tool in the Side Bar called the Performance Tracker!

The Performance Tracker gives you up to date statistics on how well you are performing against the goals of your contact center.

Contact Directory



The **Contact Directory** view has been simplified. The **List View** is no longer available, only the **Grid View**.

The **Details** panel, containing the **Information** and **History** tabs, can either be displayed to the right of the **Contact Search** area or hidden when the **Contact Search** area is expanded to the full width of the Agent Desktop.

Accessing the application Help

This application Help document is now available to you in two ways, integrated into Workspace Agent Desktop or over the web.

Many contact centers do not want agents browsing help over the web, so now when you click **?** at the bottom of the Side Bar, this Help document slides out in a little panel. Click the links to go to any topic you need, or enter keywords in the **Search** field to look for specific content.

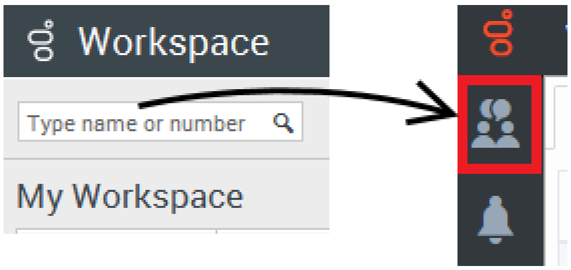
If you are allowed to access this Help document from the web, your administrator can provide you with the URL.

In Workspace Agent Desktop 8.5.2, when you selected **Help** from the **?** menu, you were directed to the Help document in another browser window or tab.

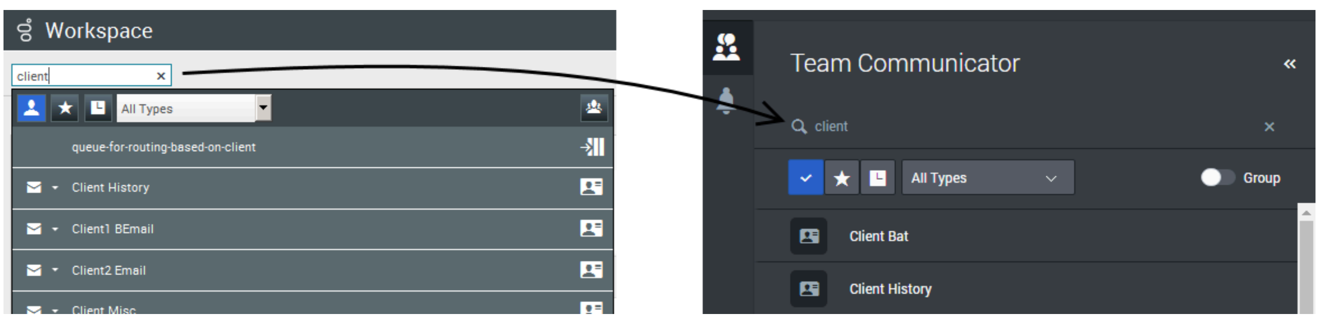
Team Communicator

Workspace Agent Desktop brings lots of little changes to the Team Communicator, but it still works the same as before.

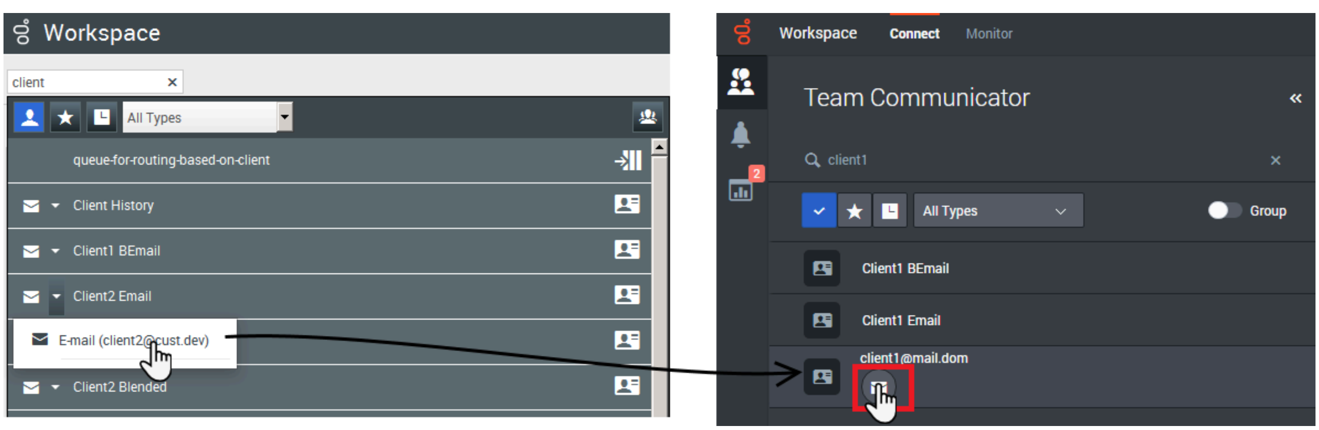
You can find the Team Communicator in the Side Bar; just click the icon to activate it. In Agent Desktop 8.5.2, it was right below the Main Menu bar.



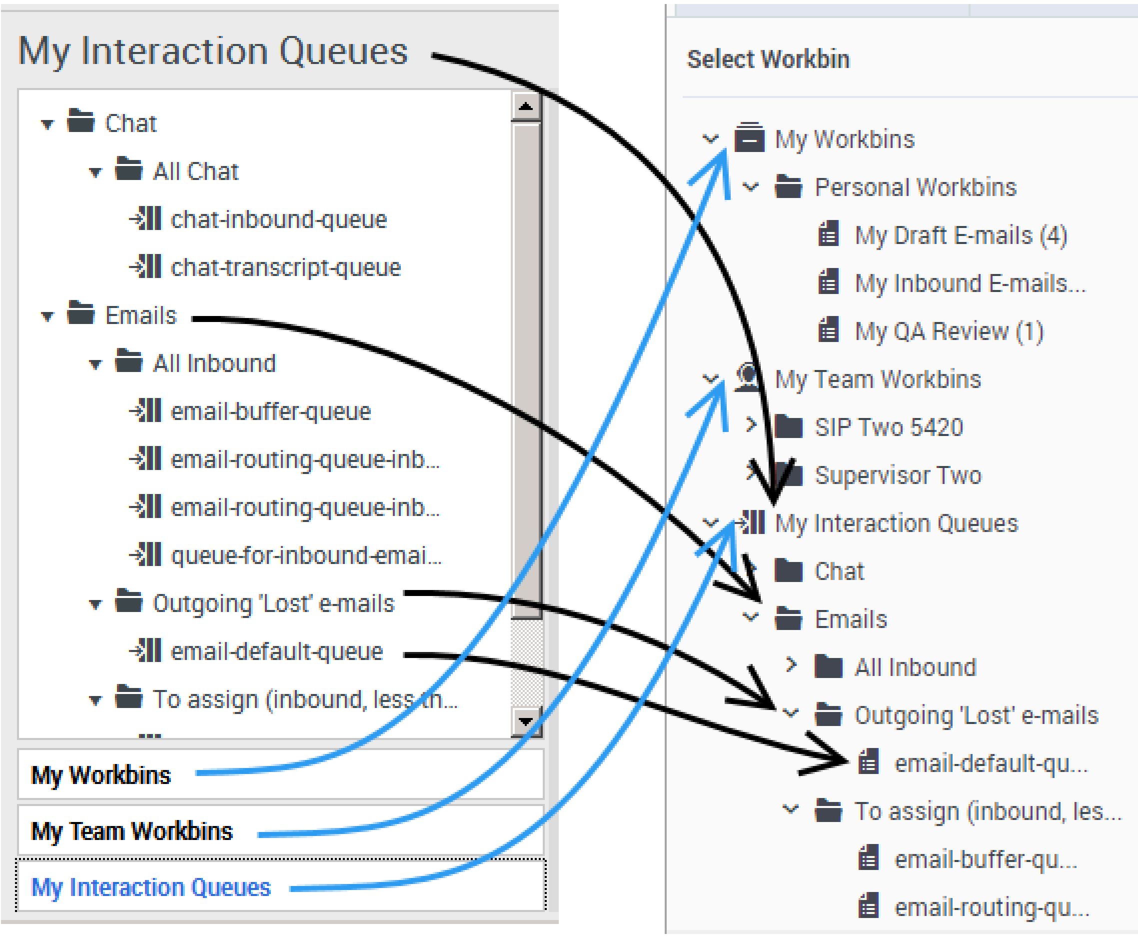
In Workspace Agent Desktop 9.0.0, you enter names, addresses, phone numbers, and so on in the search field, use the same filtering buttons (contact, favorite, recent, type, and group) to narrow your search. The search results are displayed below the search field.



In Workspace Agent Desktop 9.0.0, the **Action** menu is replaced by action buttons. Instead of selecting email or call from the **Action** menu, click the appropriate action button. To make the **Action** buttons appear, just hover your mouse pointer over the contact or internal target that you want to call, email, or select as a favorite.



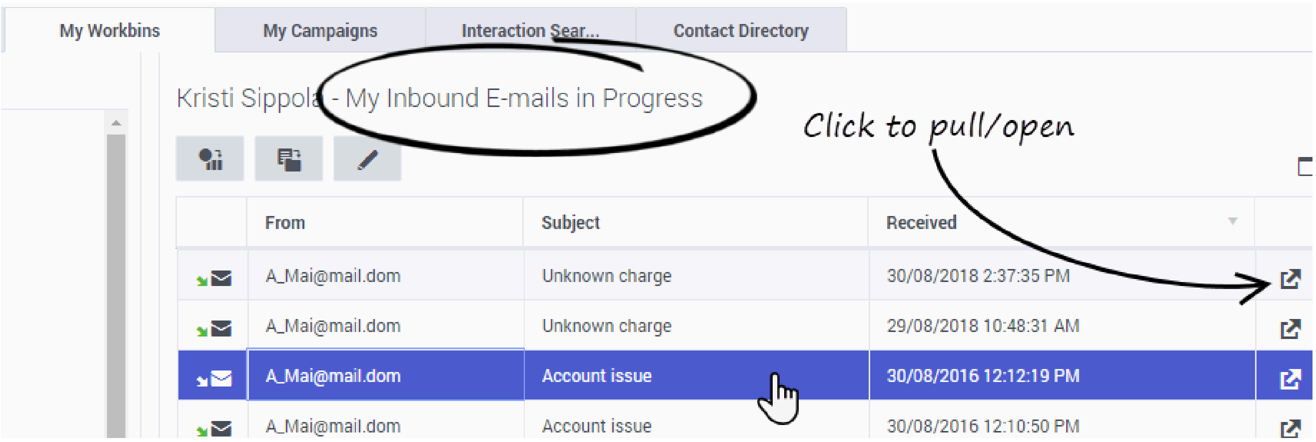
Workbins



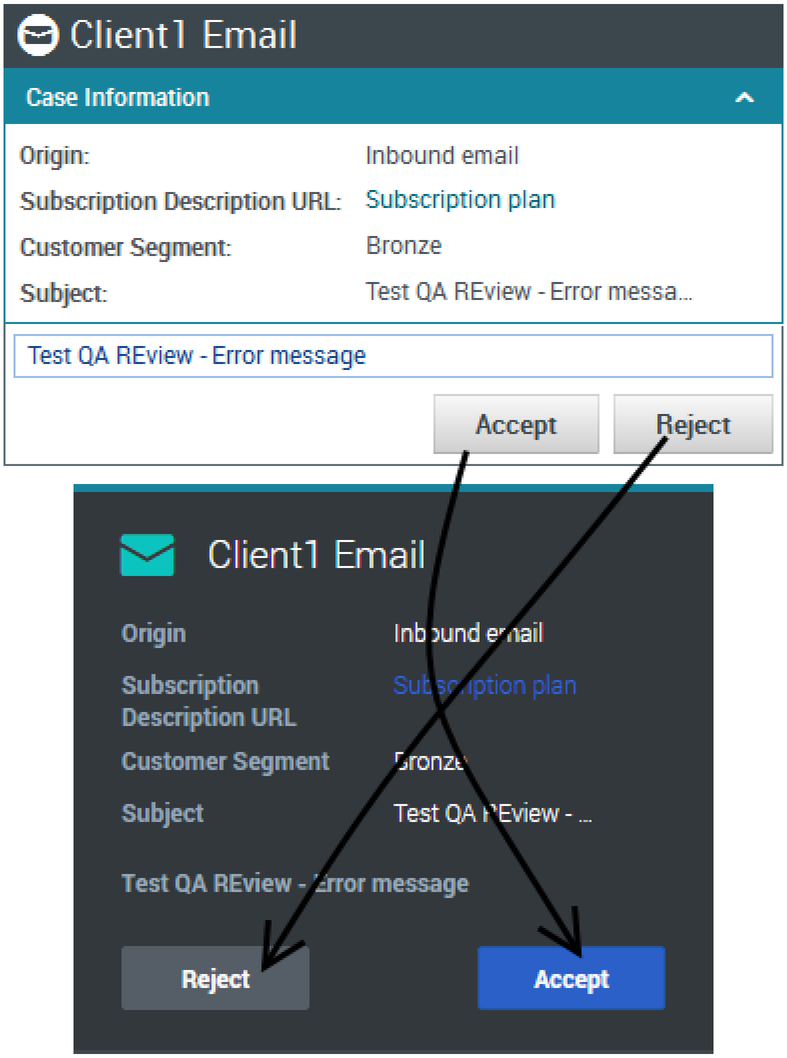
Workbins in Workspace Agent Desktop 9.0.0 work the same way that they did in 8.5.2. You can find your workbins in the **Connect** group in the Navigation Bar. You no longer use the hamburger menu to open the **My Workbins**, **My Team Workbin**, or **My Interaction Queue** lists. The **My Workbins** tab contains all Workbin and Interaction Queue views, depending on how your account is set up.

The appearance of the icons in the 9.0.0 workbins are almost the same. The only real difference is that now interaction queue icons look like folders and documents instead of like folders and queues.

To open an item from a workbin, click the **Open** icon ( ) which is displayed on the right side of the interactions in a workbin.


My Workbins
My Campaigns
Interaction Sear...
Contact Directory
Kristi Sippola - My Inbound E-mails in Progress
Click to pull/open
From
Subject
Received
A_Mai@mail.dom
Unknown charge
30/08/2018 2:37:35 PM
A_Mai@mail.dom
Unknown charge
29/08/2018 10:48:31 AM
A_Mai@mail.dom
Account issue
30/08/2016 12:12:19 PM
A_Mai@mail.dom
Account issue
30/08/2016 12:10:50 PM

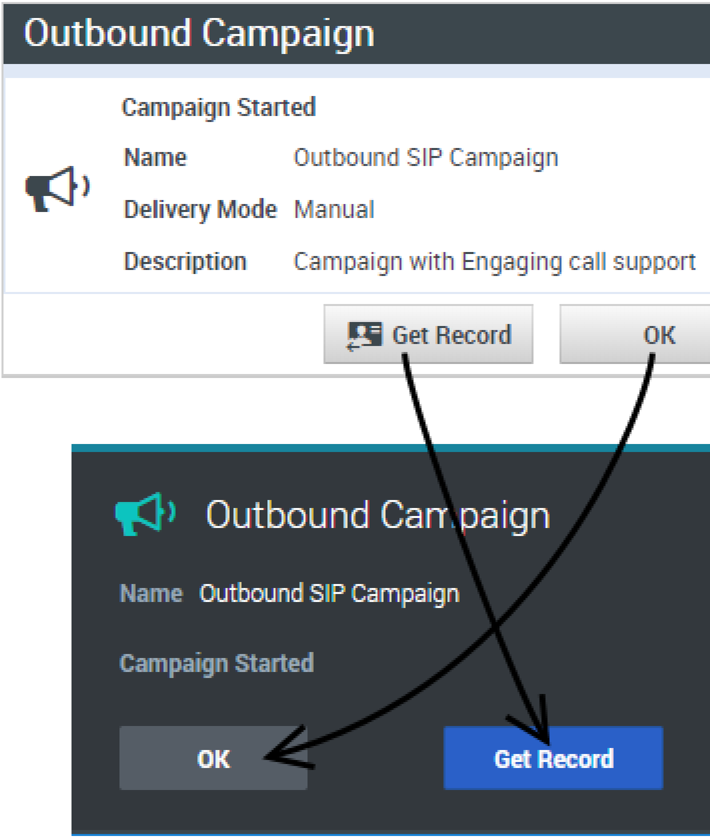
Interaction Notification (pop-up toast)



The Interaction Notification that pop-up when an interaction is directed to you looks much more bold and easier to see! It contains all the same information as before. The Interaction Notification is colored for different business purposes. Ask your supervisor what the different colors mean.

If your account is set up to enable you to accept or reject an interaction, the order of the **Accept** and **Reject** buttons is reversed! Be careful that you click the correct button!

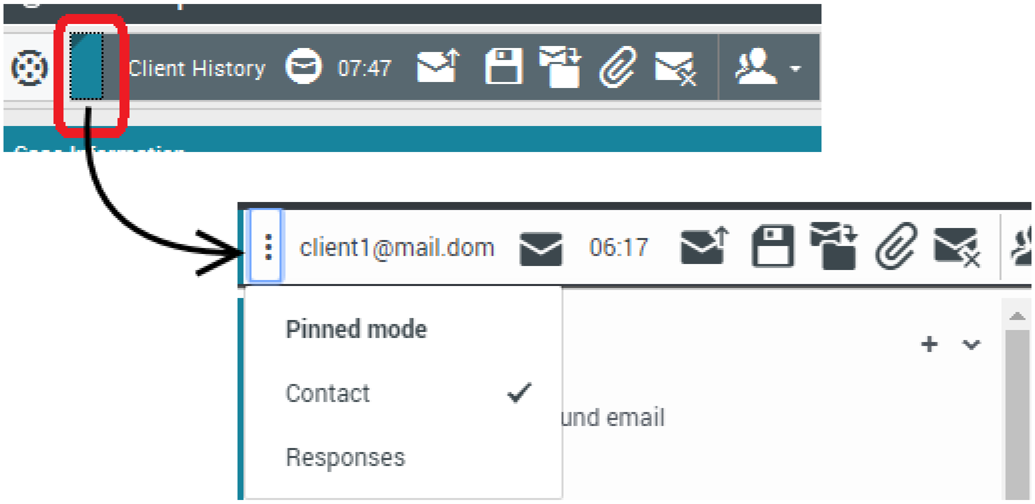
Outbound Campaigns



Outbound campaigns work the same as in Agent Desktop 8.5.2, but there are a couple of small changes. In the **Outbound Campaign** notification (pop-up), the **Get Record** and **OK** buttons are reversed! Be careful that you click the correct button!

In the **Outbound Campaign** tab, the **Get Record** button has changed appearance and location. Use this button to get a new record:

Pinned mode and Floating mode



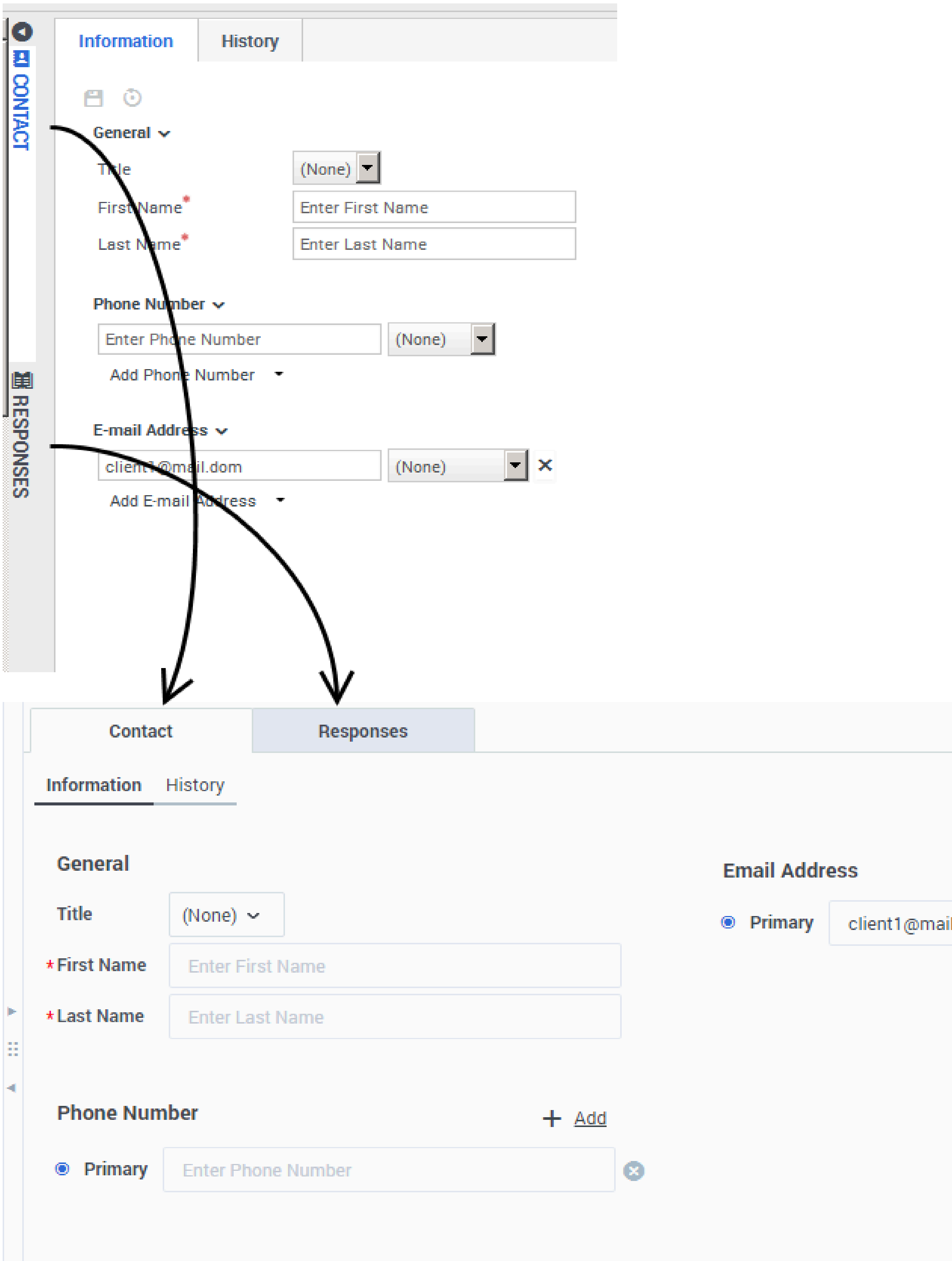
Workspace Agent Desktop 9.0.0 supports Pinned mode and Floating mode for interactions, just like 8.5.2.

To switch between the two modes in 9.0.0, click the three dots to the far left of the Interaction toolbar. In 8.5.2, you would have clicked the colored rectangle to the far left of the Interaction bar.

In Workspace Agent Desktop 9.0.0, the Pinned/Floating menu not only lets you toggle between these two modes, but when you are in Floating mode, you have some additional choices from this button:

- Pinned mode (to switch to Pinned mode)
- Contact (to switch to the **Contact** tab in Pinned mode)
- Responses (to switch to the **Responses** tab in Pinned mode)

Interaction views


CONTACT
RESPONSES
Information
History
General
Title
(None)
First Name*
Enter First Name
Last Name*
Enter Last Name
Phone Number
Enter Phone Number
(None)
Add Phone Number
E-mail Address
client1@mail.dom
(None)
Add E-mail Address
Contact
Responses
Information
History
General
Title
(None)
*First Name
Enter First Name
*Last Name
Enter Last Name
Phone Number
Add
Primary
Enter Phone Number
Email Address
Primary
client1@mail

The Interaction view has not changed very much between Agent Desktop 8.5.2 and Agent Desktop 9.0.0. Some of the buttons on the call Interaction bar are in different places, but their functionality is the same.

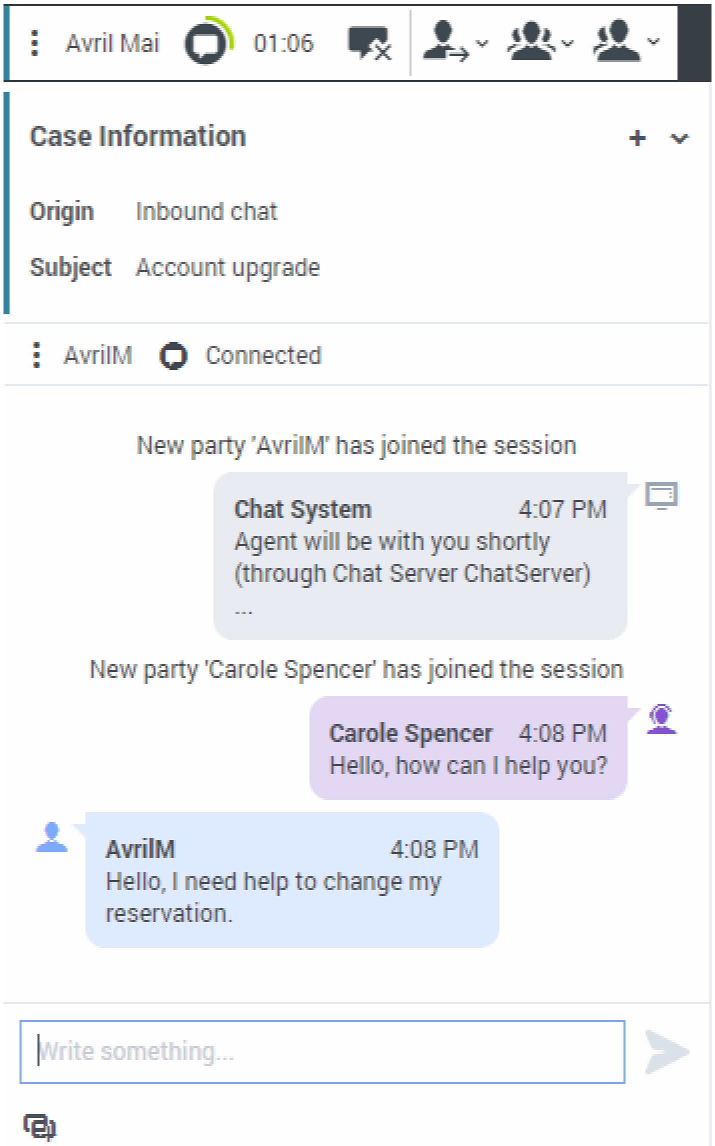
The biggest change to the Interaction view is that the vertical **Contact** and **Responses** buttons are gone. They have been replaced by a **Contact** tab and a **Responses** tab on the right side of the interaction view.

The **Contact** tab contains the **Information** and **History** tabs.

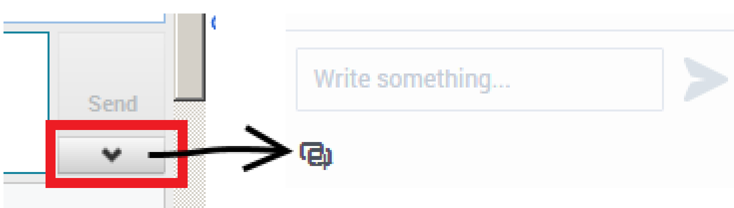
The **Responses** tab contains the standard response folders.

Changes to the Chat interaction view

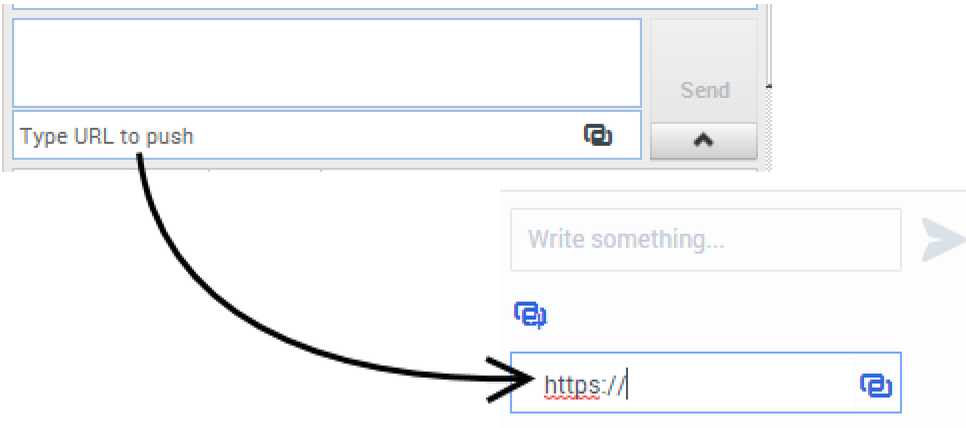
The Chat interaction view works the same in Workspace Agent Desktop 9.0.0. The Chat transcript is designed to make chat interactions easier to read and follow. It is now much clearer which messages belong to whom.



The look and feel of the Push URL functionality has changed.

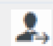
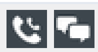


In Agent Desktop 8.5.2, to open the **Push URL** area you had to click the down arrow beneath the **Send** button. In Agent Desktop 9.0.0, click the **Push URL** icon instead; click it again to close the area.



New buttons for Transfer, Conference, and Consult

In the Interaction toolbar, the **Transfer**, **Conference**, and **Consult** buttons have all been grouped together and the same button is now used for every interaction type. In Agent Desktop 8.5.2, each interaction type had a different **Transfer** button.

Function	Agent Desktop 8.5.2	Agent Desktop 9.0.0
Transfer		
Consult		
Conference		

Improvements to Email QA review

If you are a reviewer of email interactions, you will notice that the interaction type icon has been changed. In Agent Desktop 8.5.2, the icon for an email for review was the same as a regular email icon. This could cause some confusion about what type of interaction you were handling.

In Agent Desktop 9.0.0, this icon had been changed to a supervisor eye with a small email icon underneath it.

Important

The **Delete Email** button is no longer available for email review interactions.

Getting started

Important

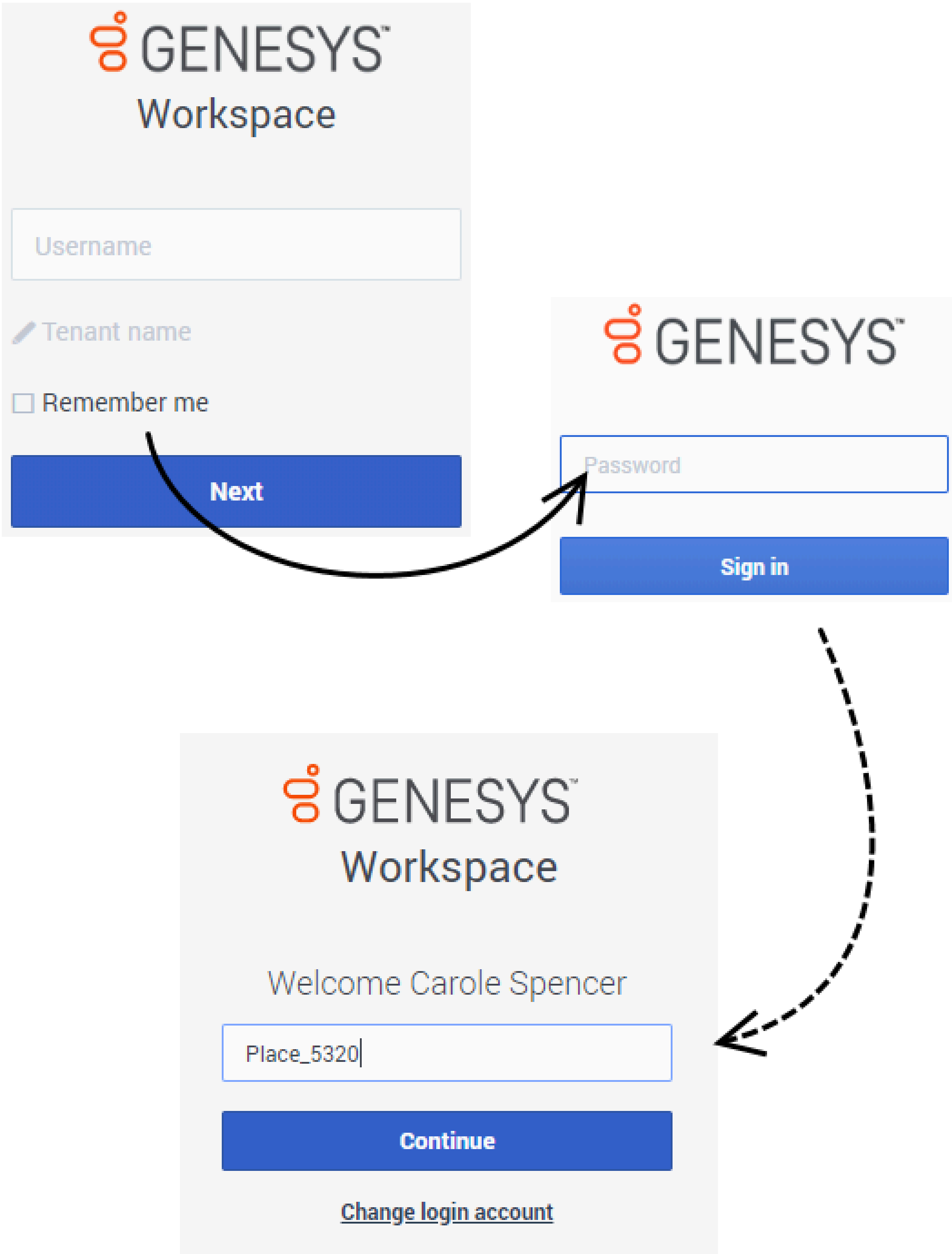
This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Getting started.

Logging in and getting ready to take call and handle Genesys Digital channels.

Important

- Due to continual changes to Agent Desktop, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you see in the product when you use it.
- Some Workspace Agent Desktop features, such as SSO, are available only for Engage Cloud users.

Log in and out of Agent Desktop



Link to video

To start Agent Desktop click its icon in **Genesys Portal**, or open a browser and go to the link for Agent Desktop that your supervisor gave you.

Log in with your username and password. If your contact center uses tenants, click **Tenant** to reveal the Tenant field. You will be told by your administrator what to enter in the Tenant field. Leave this field blank unless instructed otherwise by your administrator.

In some environments you might also be required to enter your **Place** after your password is authenticated (see broken line in the graphic). If you do not know what to enter, contact your supervisor.

Tip

- You enter your password on a different login screen. Don't enter it in the **Tenant** field.
- Clicking **Change login account** takes you back to the main log in screen.
- Agent Desktop has a security feature that might be set up for your account that logs you out if you stop using Agent Desktop or your computer for a while. Agent Desktop first displays a message to warn you that you are going to be logged out. If Agent Desktop logs you out, just log back in again when you are ready to start using Agent Desktop.

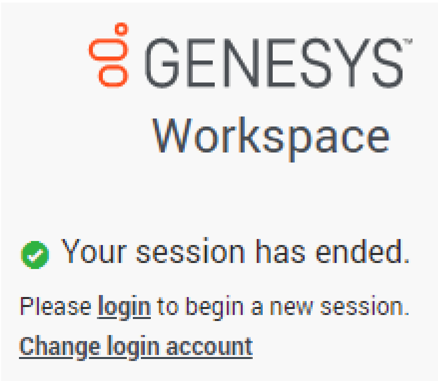
Important

- You may login only to a single Agent Desktop session at a time. You must log out of one session before logging into a new session.

Logging Out (Exit)

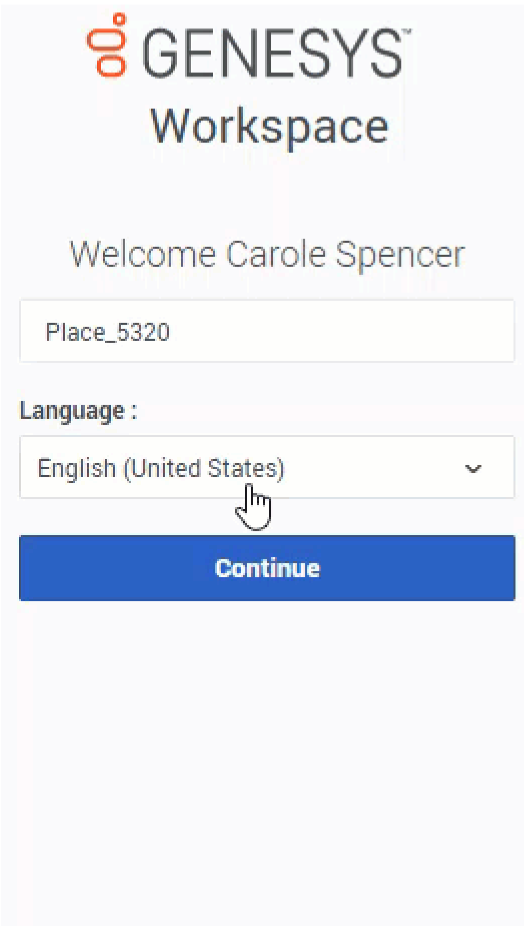
To log out of (Exit) Agent Desktop, you must use the **Exit** option from the menu in the upper right-hand corner. You won't be able to log out if you have any active calls or Digital interactions.

In some environments, after you exit you *might* see one or more links, one to login again, and one to switch login accounts. Click the appropriate link to begin a new session. If you do not see these links, just login as usual.



How do I choose my language when I log in?

Your account might be configured to enable you to change the display language of Workspace Agent Desktop. If it is, after entering your username and password, a third login step is added that lets you choose your preferred language from the **Language** drop down list. Your administrator determines which languages are available to you in this list. Choose your language then click **Continue**.



Single Sign-On environments

Important
This feature is available only for Engage Cloud.

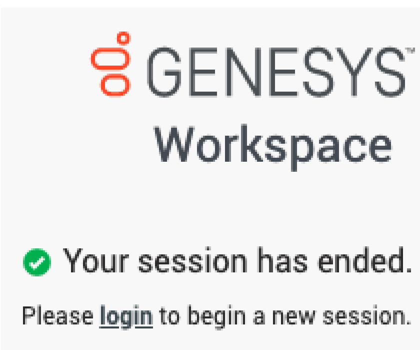
You might work in an environment that uses Single Sign-On (SSO) identity authentication. If you do, your login experience will be a little different. After entering your username in the application login screen, you will be taken to your company's authentication provider where you will enter your username and password. After that, you will not have to log in again until your authentication expires which is typically every eight hours. Using SSO means that once you log in to one application, you will not have to log in to any other applications that are also set up for SSO.

In some SSO environments, you will only have to provide your username to login as you are already authenticated.

Logging out in SSO environments

> **Important**
> This feature is available only for Engage Cloud.

If your company uses SSO, after you click **Exit** the Workspace window informs you that your session has ended. You must click the **Login** link to start a new session.



Remote and virtual desktop environments

You might work in an environment that uses Virtual Desktop Infrastructure (VDI, sometimes called VMware) 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 Genesys Softphone 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 Genesys Softphone automatically launches and the Genesys Softphone icon is displayed in your system tray. Until you log in to Workspace, this icon looks like this: . After you launch Workspace and the Genesys Softphone is connected, the Genesys Softphone icon looks like this: .

Browser specific notifications and issues

Some browsers require specific actions to ensure that you receive notifications from Workspace Agent Desktop and the Genesys system. For detailed information about allowing notifications for your browser, review the documentation specific to the browser and version that you are using. The following are some guidelines:

- **Chrome**: When you login , you might see a browser notification asking whether to allow or deny notifications from the Workspace Agent Desktop URL. Click **Allow**.
- **Firefox up to v71**: When you login , you might see a browser notification asking whether to show notifications from the Workspace Agent Desktop URL. Click **Show for this session** or **Always show**.
- **Firefox v72 and higher**: When you login, you might have to click the **Notifications** icon in the address bar to display the dialog that enables you to allow notifications. You are not prompted to do this by the browser.
- **Edge**: When you login, you might see a browser notification at the bottom of window asking whether to show notifications from the Workspace Agent Desktop URL. Click **Yes**.

Log in, log out, log on, log off, and exit, what's the difference?

You log in and log out of the Workspace Agent Desktop application. Logging in means launching the application in your browser and identifying yourself to the system so that you become authorized to receive interactions and use the various features that are enabled for you.

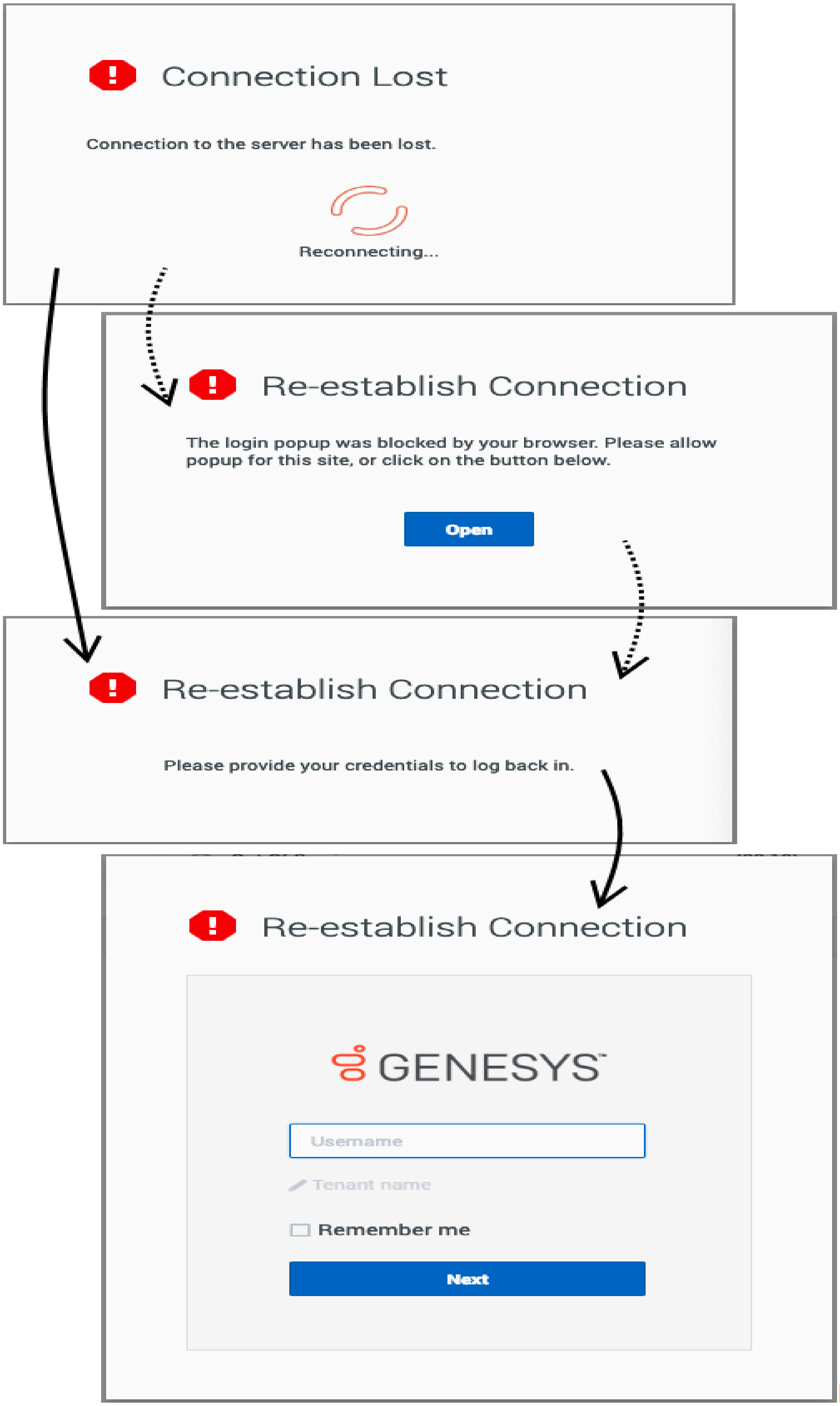
Typically, you log in to Workspace Agent Desktop at the beginning of your shift and log out (Exit) at the end of your shift. To log out of Workspace, you must use the **Exit** option from the menu in the upper right-hand corner. You won't be able to log out if you have any active calls or interactions.

You log on to and log off of channels in Workspace Agent Desktop. Channels include voice, email, chat, and so on. Channels are the media that you use to interact with contacts. When you log in to Workspace Agent Desktop, you are usually logged on to all the channels assigned to you, and when you log out (exit) of Workspace Agent Desktop, you are logged off from all the assigned channels. In some environments, you might be logged off from one or more channels when you log in because the channel is out of service or your administrator has set up your account to be logged on to specific channels only.

Use the **My Channels** tab to log on or log off one or more channels. Logging off of all your channels does not log you out of Workspace Agent Desktop. You must still exit the application to log out.

You can log on or log off all your assigned channels by using the Global Status menu.

Handling a system disconnection



Link to video

Workspace is designed to handle system disconnections. If the server that directs interactions to you becomes disabled or disconnected for some reason Workspace automatically tries to connect you to a back up server so that you can keep serving your customers with minimal interruption. If a connection loss occurs you are informed right away by the **Connection Lost** message. Workspace immediately tries to reconnect you.

If Workspace cannot reconnect you, you must log in to the back up server when the **Re-establish Connection** log in window is displayed. Log in just like you do when you first log in at the start of your shift.

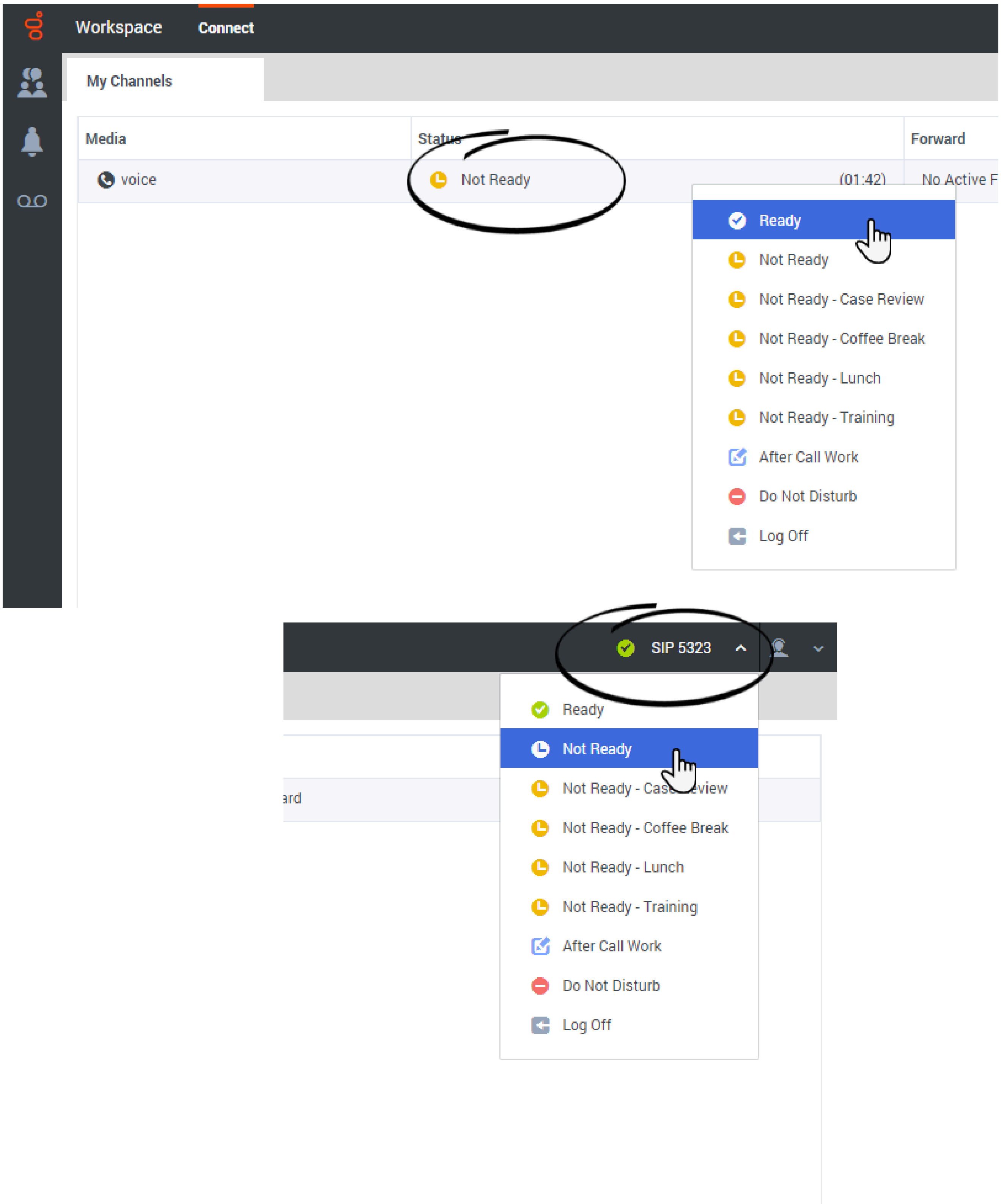
If you have pop-ups blocked in your browser, you might see a message asking you to enable pop-ups to see the log in window. You might be able to click the **Open** button in the **Re-establish Connection** window to open the log in window.

In the event that the back up server is not available, the **Host Not Available** message is displayed. Click **Refresh** to refresh your browser and log in to your company's system as soon as the server become available again.

What if the system is down when I log in?

For agents who are voice-only, if the system is down when you try to log in you will see the **Connection Lost** message right away. If Workspace is unable to connect immediately to the back up server, the **Connection Failed** window is displayed requesting that you log in again. You might have to keep trying until Workspace is able to connect to the server or the back up server.

Change your status to Ready


Workspace
Connect
My Channels
Media
Status
Forward
voice
Not Ready
(01:42)
No Active F
Ready
Not Ready
Not Ready - Case Review
Not Ready - Coffee Break
Not Ready - Lunch
Not Ready - Training
After Call Work
Do Not Disturb
Log Off
SIP 5323
Ready
Not Ready
Not Ready - Coffee Break
Not Ready - Lunch
Not Ready - Training
After Call Work
Do Not Disturb
Log Off

Link to video

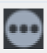
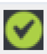
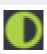
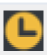
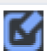
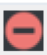
To receive calls, you must be in a **Ready** status (indicated by a green check mark beside your name).

If you need to change your status, click your name at the top right-hand corner of the screen and select **Ready**, or go to **My Channels** and toggle the voice channel or one or more of your Genesys Digital channels to **Ready**.

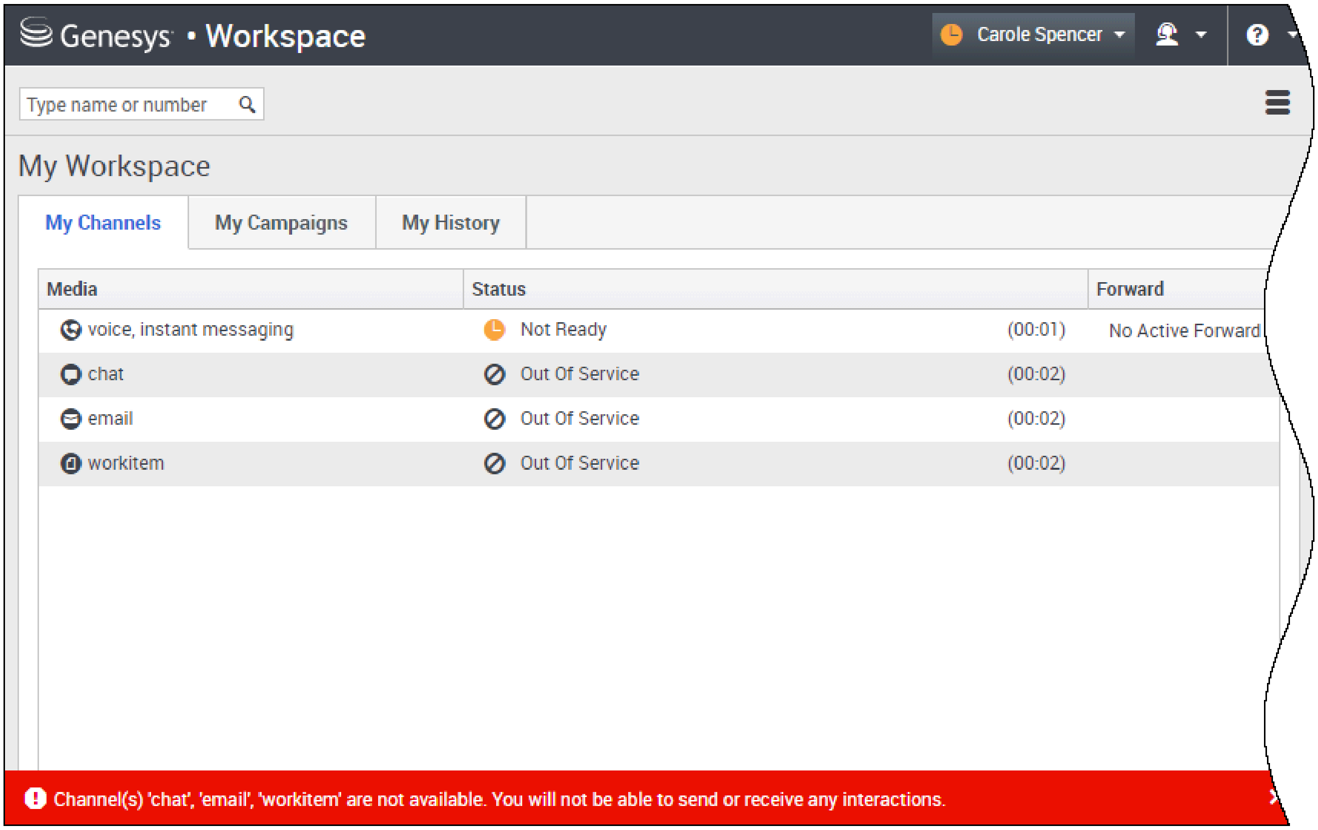
Watch the video for a short demonstration of changing your status. **Note:** This video show Agent Desktop in an environment that has many different media channels available, such voice, chat, and email. Don't worry if not all these channels are available in your environment.

Table of status icons

Here is a table showing the status icons that you might see while using Workspace Agent Desktop.

Agent Desktop icon	Agent Desktop status
	*State unknown*
	Logged out
	Ready/Ready with Action Code
	Partially Ready
	Not Ready/Not Ready with Action Code
	(Not Ready) After Call Work
	Do Not Disturb (DND)
	Out of Service

What happens if not all channels are available when I log in?



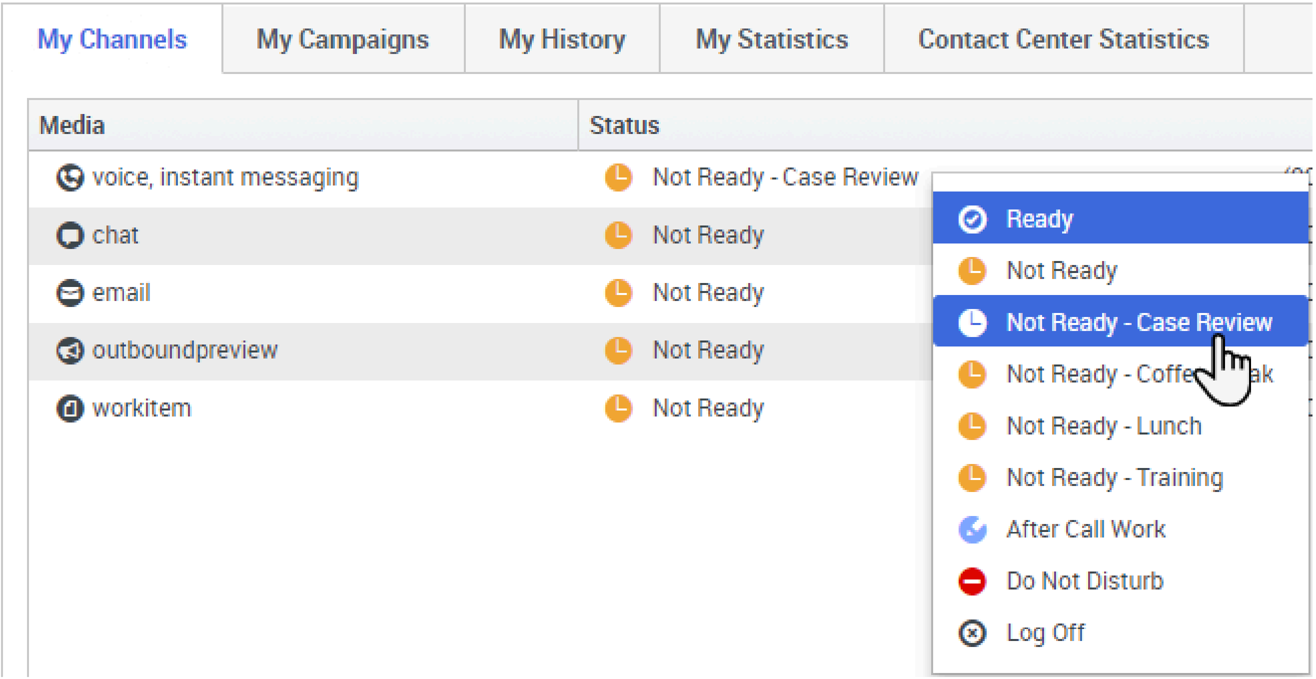
Sometimes when you log in, one or more of the channels that you are assigned might not be available.

You will know that one or more channels are not available because you will see a warning message at the bottom of the Workspace window.

When this happens, you can still log in, but when you look at your My Channels tab, you'll see that one or more channels have the **Out Of Service** status. When a channel is out of service, you cannot log on or off on that channel and you cannot set your status.

When the channel becomes available again, a message will be displayed at the bottom of the Workspace window. You can use the **My Channels** tab to change your status on that channel.

Setting your status to Not Ready with a Reason

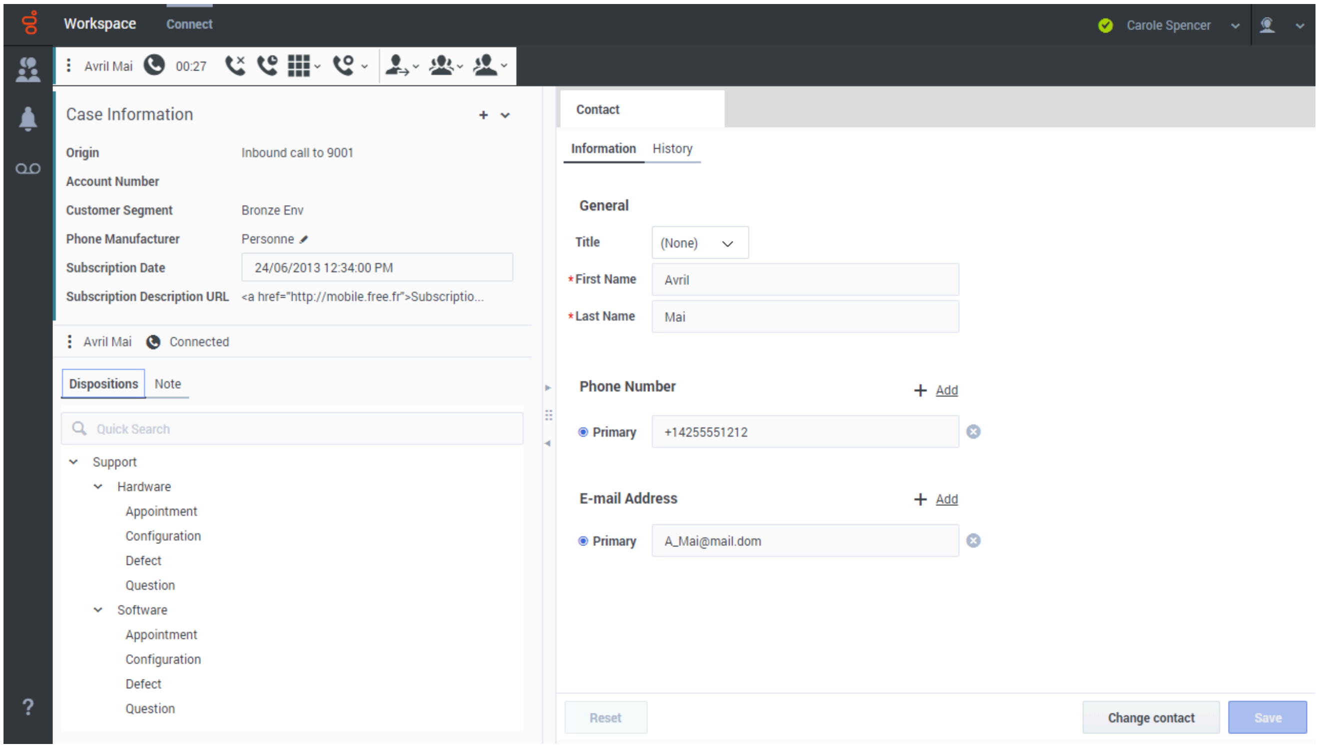


Sometimes you need to set your status on one or more channels to Not Ready so that you do not receive new interaction on that channel. You can choose to set the status to Not Ready or Not Ready with a reason. Your administrator sets up the Not Ready Reasons that are available to you from the Status drop-down menus.

Tip

If you manually set your status to Not Ready while you are handling a phone call or a Digital channel such as chat or email, the system starts recording your time in that state rather than the time spent handling the call. Some contact centers have the Pending state enabled so that the Not Ready state does not take effect until after you end your phone call or Digital interaction, or after you send your email or place it in a workbin.

Handle an inbound call



Link to video

Make sure your phone device is connected and ready.

When a call arrives, you'll get a pop-up in the bottom right-hand corner of your screen. You might also hear a sound to alert you that a call has arrived.

Click **Accept** to connect the call. If you **Reject** the call, or ignore the pop-up, it goes to the next available agent.

Watch the video for a short demonstration of how to handle a voice call. **Note:** some of the features shown in this video might not be available in your contact center.

Detailed call handling information can be found here.

To get you started, here are some common call handling features:

 = Hold
 = Resume
 = Transfer
 = Hang up

 = Mark Done

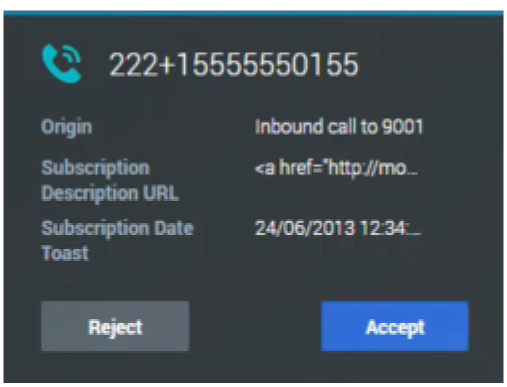
After the call is complete, you might enter an **After Call Work** state, during which you can complete any tasks related to the call. For example, you could add a Note or select a Disposition code.

What kinds of customer interactions can I receive?

Depending on your assignment, you might receive interactions through the Voice or Digital channels, such as Chat or Email channels, directly from customers or by way of a consultation, conference, or transfer. Some contact centers are set up to always direct interactions from the same customers to the same agents. If your assignment is set up this way, then you will be able to assist certain customers whenever they call.

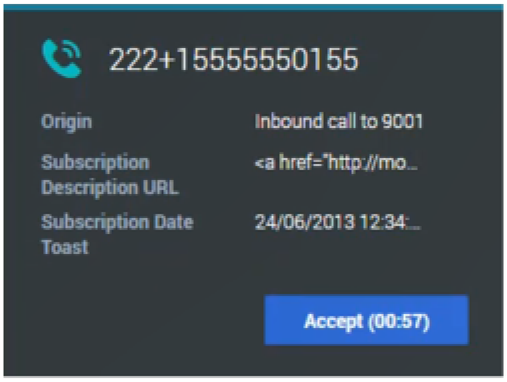
How do I accept an incoming interaction?

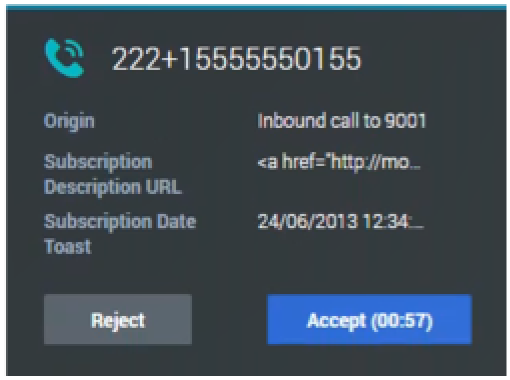
New calls, chats, emails, workitems, and other interaction types arrive at your workstation in a pop-up interaction notification. In most cases you can decide whether to accept or reject the interaction by clicking **Accept** or **Reject**, or, if you take no action at all, it will eventually time out and go to the next available agent.



Your account might be configured for auto-answer which means you can't choose to reject an interaction. When the interaction is directed to you, it opens automatically on your desktop.

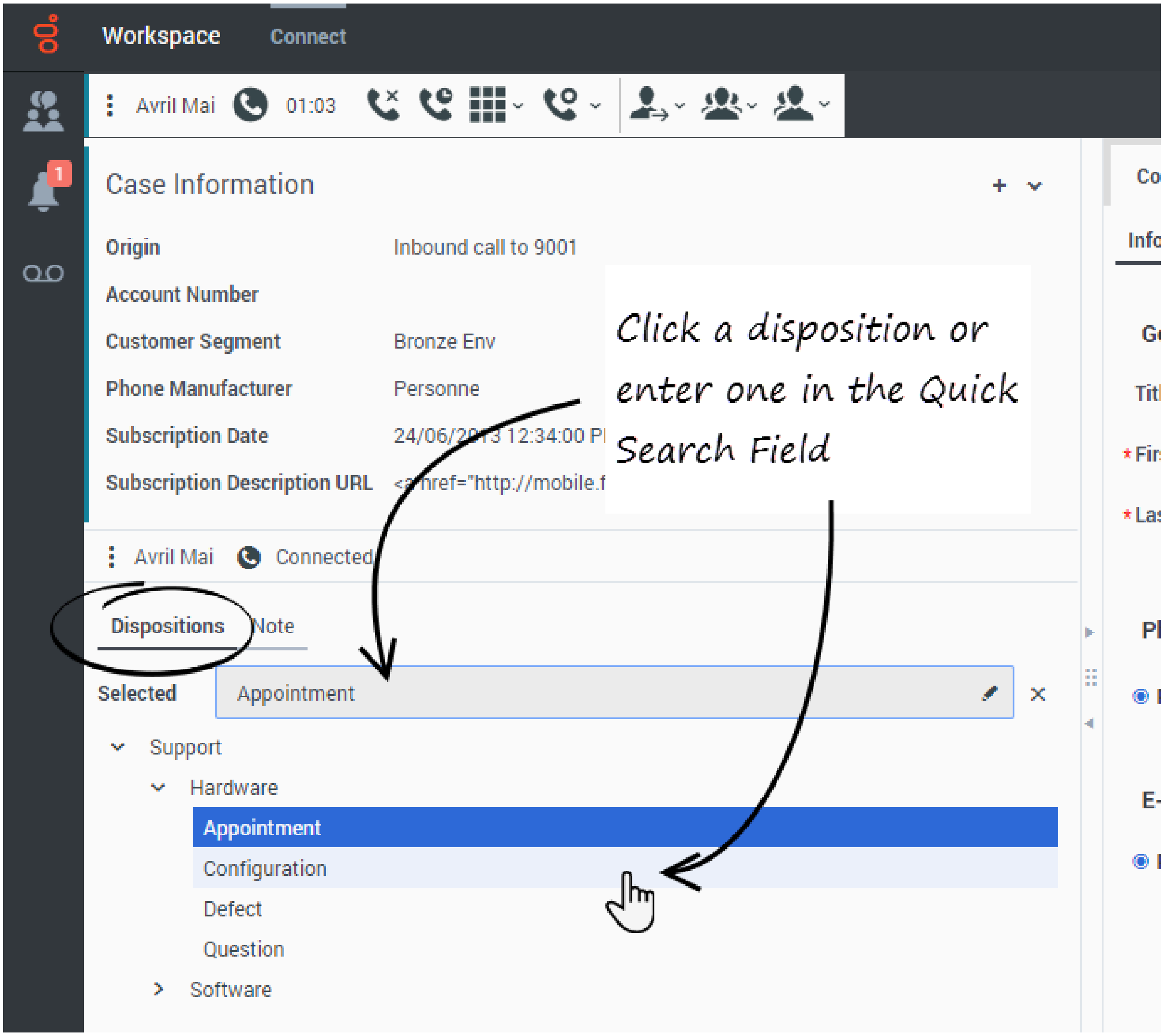
However, some accounts that are configured for auto-answer might have a timer on the **Accept** button. This gives you the opportunity to review the Case Information in the interaction notification before the interaction is auto-answered. You can click **Accept** before the timer counts down if you are ready to accept the interaction. You might also see a **Reject** button on a timed auto-accept interaction that permits you to reject the interaction before it is auto-accepted.





Many browsers, such as Google Chrome, Mozilla Firefox, and Microsoft Edge, also display notices to you about interactions and other events. You can manage these notifications through the settings in the browser. See the help for the browser you are using if you want to control browser notifications.

How do I set a disposition code?



You can assign one disposition code to an ongoing or terminated interaction to characterize the outcome of the interaction.

The Disposition Code view is a tab in the Interaction view. It contains a list of choices that you can click to specify the outcome of the interaction. A search field is available to search among the disposition codes.

The Disposition Codes are organized within grouping folders, which cannot be selected as dispositions. These grouping folders do not correspond to business attributes, as they are only textual information.

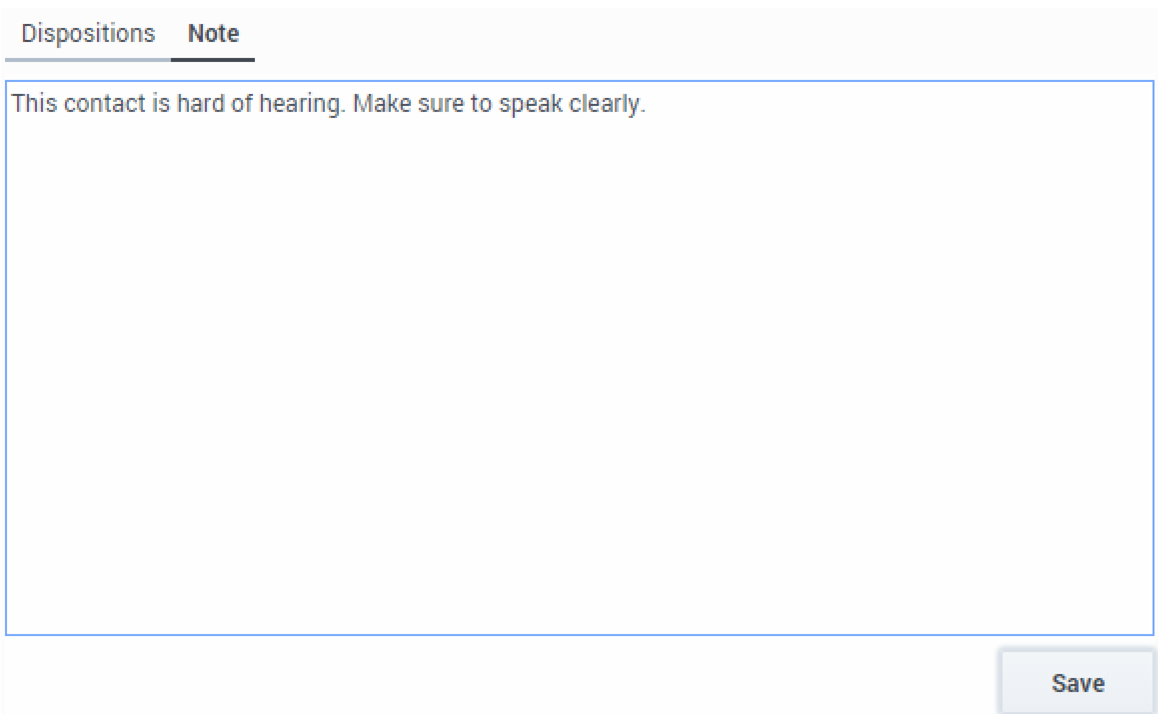
Select a disposition for the interaction. Once a disposition is selected, the disposition list is hidden and the selected disposition appears in a textbox located at the top of the listing. You can't edit a disposition but you can select a new one.

The complete path to the disposition is available as a tooltip of the disposition name.

Depending on your system configuration:

- You might have to set a disposition code before you click **Mark Done**.
- You might be able to click **Mark Done** without a disposition code.
- The Disposition Code view might not be displayed.

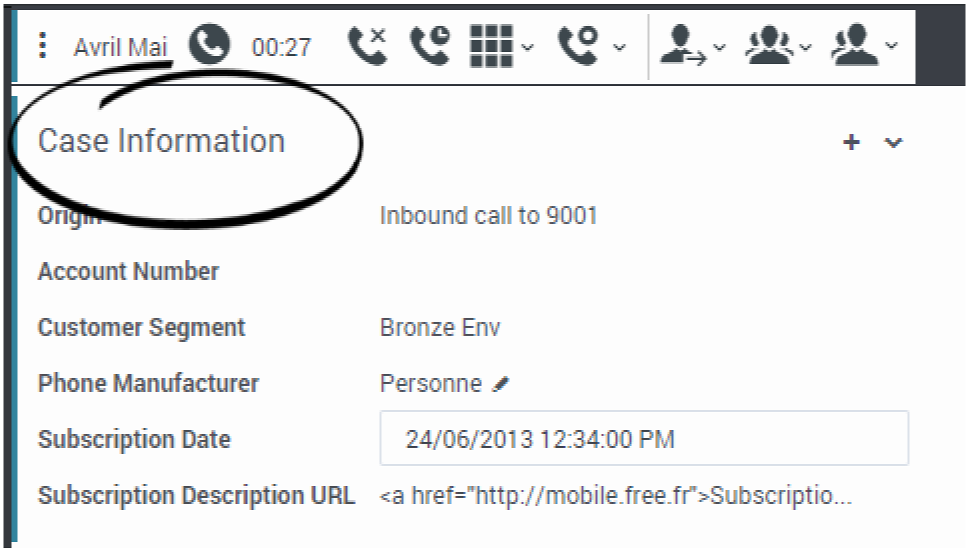
How do I add a note to an interaction?



The note is a feature that enables you to enter comments about the current interaction or about a selected interaction. You can view the note in most channels as well as the Contact History view.

> **Important**
> You must click **Save** to store your note.

How do I work with case information?



The case information view (also called attached data) provides information about an interaction — for example, an account number or type of service.

Some case information might be displayed as the title of the web page, an anchor, or a link. If the link is active, it is displayed as blue text.

To make changes, select the field you want to edit or delete. Fields that you can edit display a pencil icon when you roll your mouse pointer over them.

You can add more fields with +.

Where can I find answers to common contact questions or problems?

First, try the standard responses, your own contact history, and any customized knowledge repositories your contact center uses. If none of those options works, you can start a consultation with one of your team members.

What next?

- Navigating Agent Desktop
- Calls
- Watch "How to" videos

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

Navigating Agent Desktop

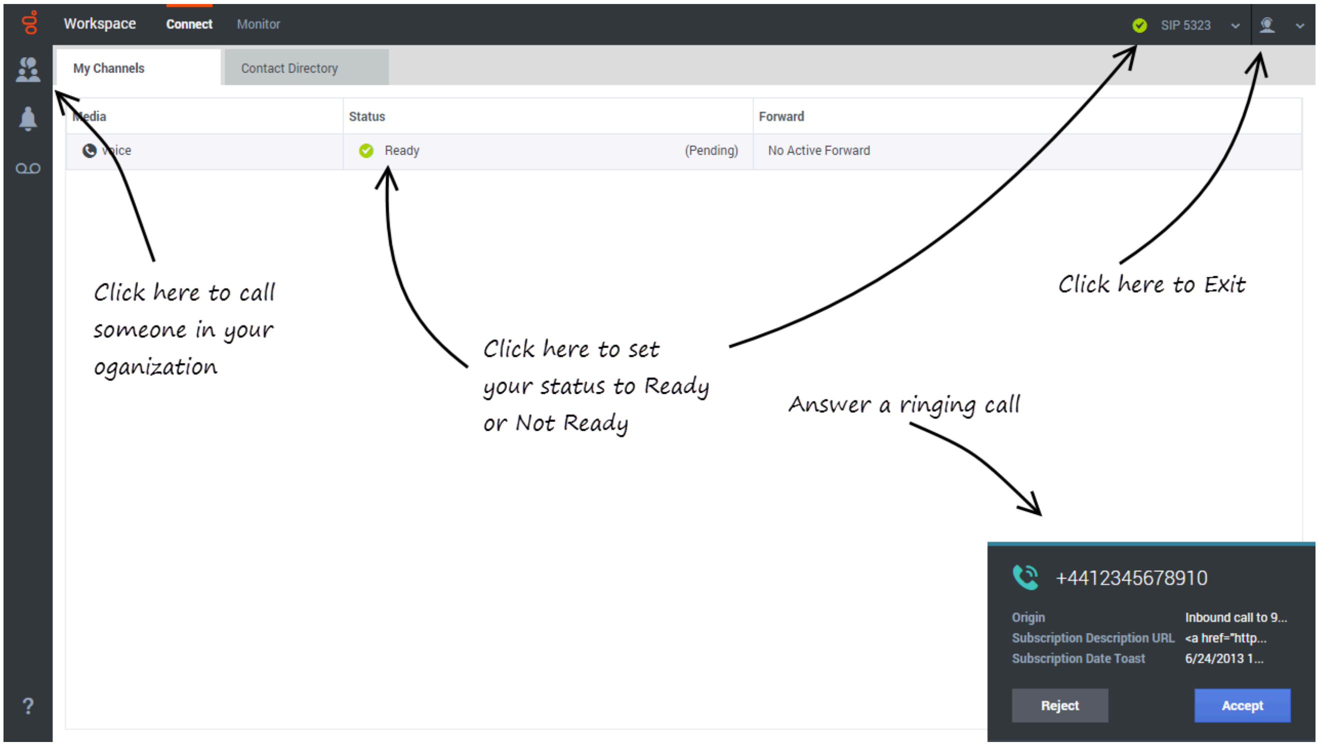
> **Important**
>
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Navigating Agent Desktop.

Having trouble finding your way around Agent Desktop? If you need help identifying a button or field, hold your mouse pointer over it to reveal a tooltip.

Do you use a screen reader? Do you navigate Agent Desktop using a keyboard? You can find out all about it here!

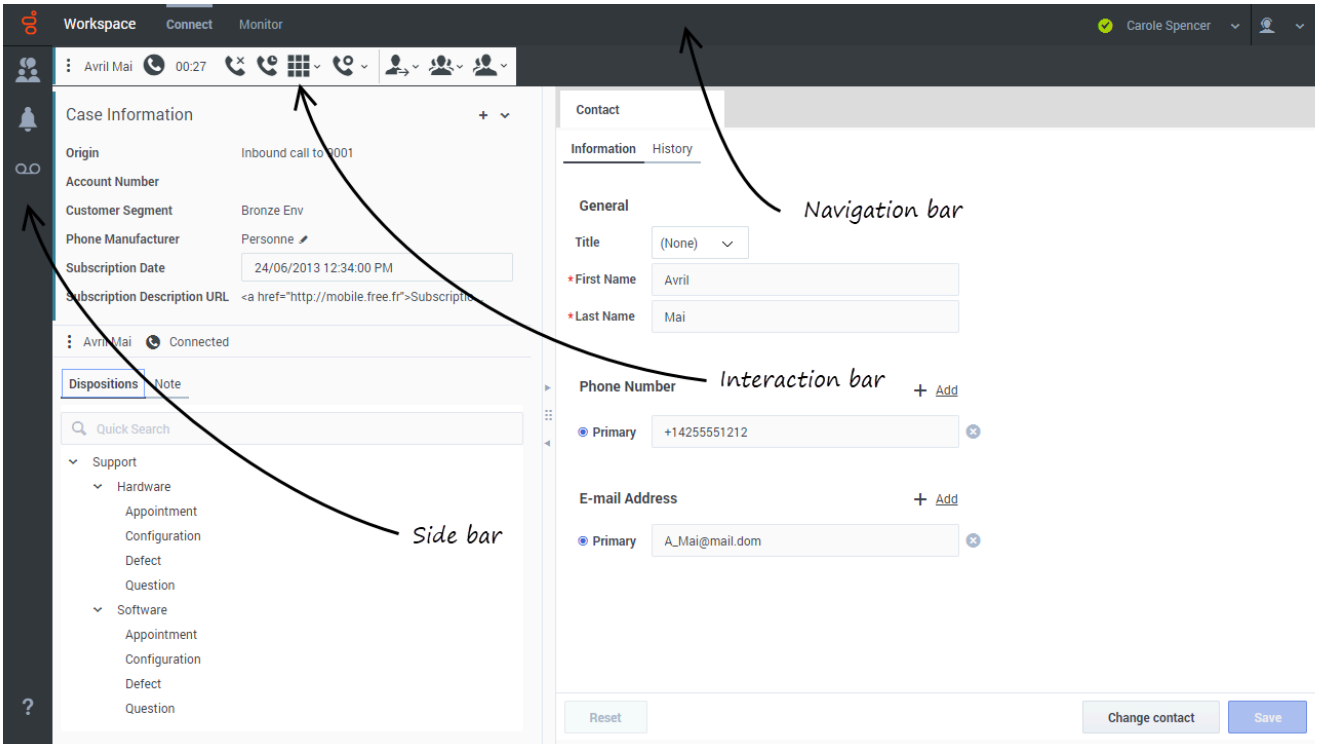
> **Important**
>
> Due to continual changes to Agent Desktop, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you see in the product when you use it.

Main view



The main view lets you access the most common features that you use every day, such as handling calls, changing your status, calling internally, and retrieving your voicemail managing your channels, campaigns, KPIs, and messages.

Navigation Bar and Side Bar



The navigation bar lets you switch between different desktop views. It also contains the **Status** menu and the **Main** menu. The navigation bar might contain buttons to let you view panels that are specific to your company, including web applications that you use to complete your work.

Connect group

- **My Channels**: Set your status on individual channels, such as voice and turn call forwarding on or off.
- **My History**: Search through the history of interactions that you have handled.
- **Interactions Search**: Search through all interactions in your company database that you are allowed to view.
- **Contact Directory**: Search for contacts and view their information and history.

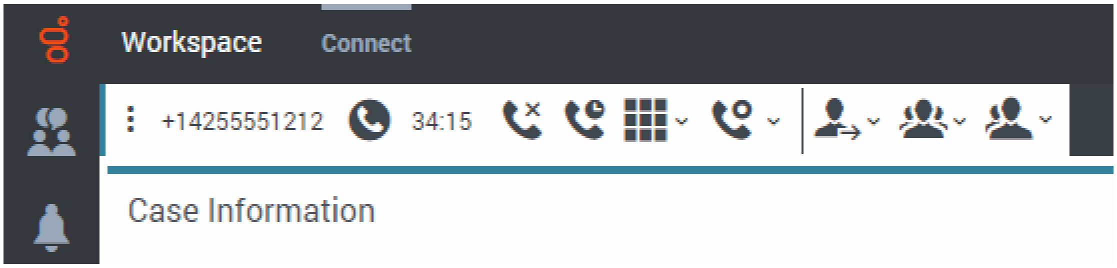
Monitor group

- **Contact Center Statistics**:; View the latest statistics and alerts for your contact center.

The side bar contains the buttons that let you start calls, retrieve your notifications (system messages), and view your voicemail. The side bar might contain custom buttons related to tasks and features that are specific to your company.

- **Performance Tracker**: View your latest statistics (KPIs) and alerts.

Interaction Bar



The Interaction Bar is displayed in the main view whenever you have one or more active interactions. If you have multiple active interaction, only the tools for the current active interaction are displayed. The toolbar for other active interactions collapse until you click them to make them current.

Each interaction is represented by a control bar. You can use the control bar to perform basic actions that are specific to the interaction type, such as ending a call.

- Click the control bar for an interaction to give it the focus. All other open interactions are collapsed to the Interaction Bar.
- Click the small colored bar on the left of the interaction control to toggle between pinned mode and floating mode. In floating mode, other open views appear dimmed behind the interaction view.

Entries in the Interaction Bar flash (or blink) when specific events occur that might require your immediate attention.

Contact Center Statistics and KPIs

There are three places where you can view and track your performance and the performance of your contact center:

- The Dashboard region in the Monitor view
- The Performance Tracker view in the Sidebar
- The Statistics Gadget tool in the Navigation Bar.

Note: Some or all of these features might not be available in your environment.

Here are the icons that you might see in the Dashboard (Contact Center Statistics) region and Performance Tracker view:

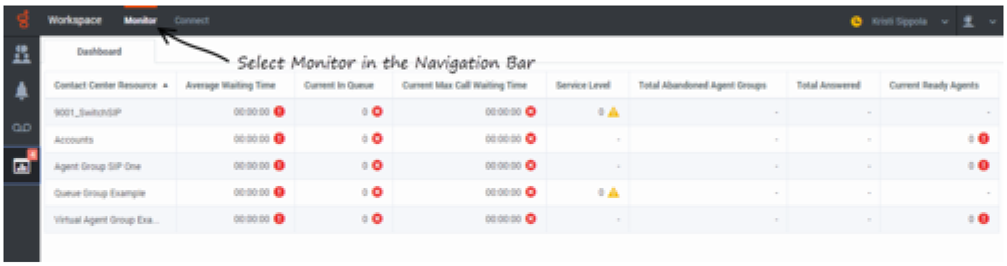
- A worst icon () is displayed if the evaluation of the performance is below the expected worst level for the agent statistic (KPI) or contact center statistic.
- An error icon () is displayed if the evaluation of the performance is below the expected error level for the agent statistic (KPI) or contact center statistic.

- A warning icon ( ) is displayed if the evaluation of your performance for the agent statistic (KPI) or contact center statistic goes beyond the expected warning level for the statistic.

Dashboard

The items displayed on this region are Contact Center statistics for Routing Points, Queues, and other contact center facilities. The Dashboard region displays statistics that summarize the state of various conditions, such as waiting time, calls in queue, average maximum waiting time, service level, and answered and abandoned calls, that are monitored by your contact center.

Click the **Contact Center Resource** column head to change the sort order of the resources.

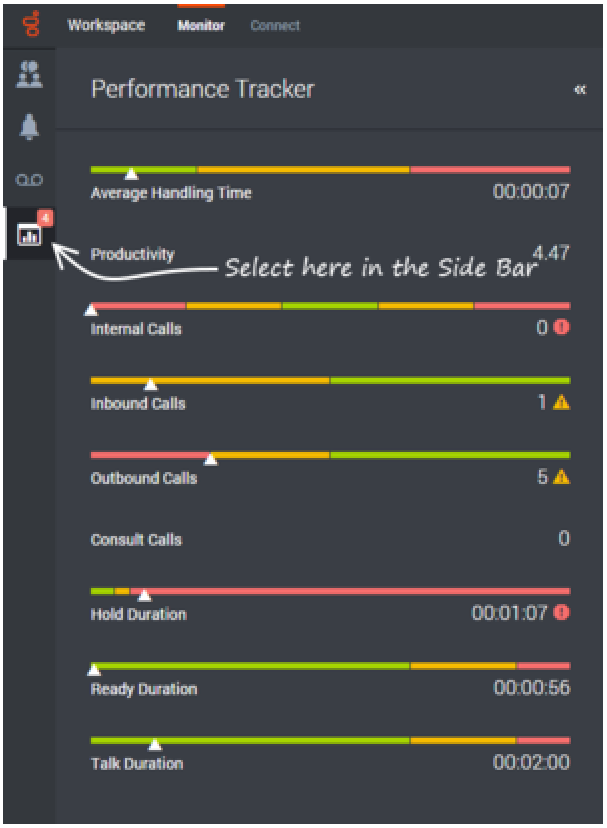


Performance Tracker

This view displays the list of your Key Performance Indicators (KPIs).

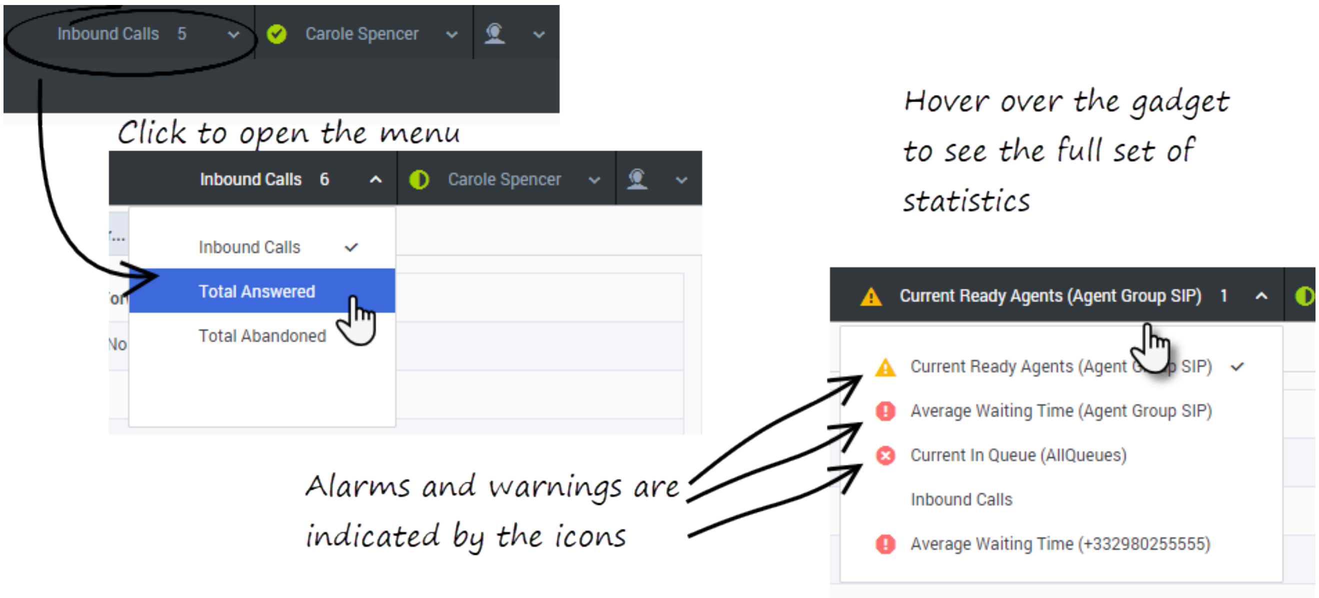
The KPIs that are displayed are set up by your system administrator.

Your KPIs are shown as tri-colored bars with a white triangle indicating your standing. The name of the KPI appears just below the bar. If you are not meeting your KPIs, the white arrow points to yellow and red. When you are meeting your KPIs, the while arrow points to green. Each statistic also displays the statistic value under the colored bar to indicate what your current value is for the statistic. If you have any warnings, they are displayed next to your statistic value.



Statistics Gadget

The Statistics Gadget helps you to stay up to date on certain key statistics. Your administrator decides which statistics are available for you to view.



The Statistics Gadget displays one statistic at a time, giving you the current status of service level, number of calls waiting, number of calls you have handled, and so on.

Hover your mouse pointer over the Statistics Gadget to see the current values for all of the statistics that have been assigned to the gadget by your administrator.

If more than one statistic has been assigned to the gadget, click it to open a list of currently available statistics and select a different one to display. A check mark is displayed next to the current statistic.

Here are the icons that you might see in the Statistics Gadget:

- A worst icon ( ) is displayed if the evaluation of the performance is below the expected worst level for the agent statistic (KPI) or contact center statistic.
- An error icon ( ) is displayed if the evaluation of the performance is below the expected error level for the agent statistic (KPI) or contact center statistic.
- A warning icon ( ) is displayed if the evaluation of your performance for the agent statistic (KPI) or contact center statistic goes beyond the expected warning level for the statistic.

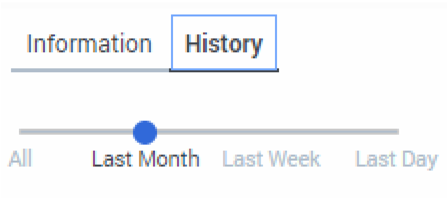
Tracking Your Time

In most cases, the time you spend handling an interaction is tracked from the moment you click **Accept** to the moment you click **Done**. However, if you are an agent enabled to handle multiple channels of interactions, your administrator can choose to track your time based on the total time spent handling all the interactions that are related to a single Case. You could be talking to a contact on the phone, send them a Chat message, and then compose and send a follow-up email. All these interactions together comprise a single Case.

If you are handling multiple interactions that are not part of the same Case, your administrator might choose to track your time by how many seconds elapsed between you accepting the interaction and you marking it as Done. That means if you have several chat interactions with different contacts all going on at the same time, your time on each interaction might not be accurately tracked. You administrator might choose to track your time based on how long each interaction was the active interaction. When you are actively working on one interaction, the other interactions are in the background. Active interactions are said to be *in focus*. Only one interaction can be in focus at a time. Your administrator might track your time based on the total time each interaction had focus.

If you are unsure how your time is being tracked, ask your supervisor or administrator.

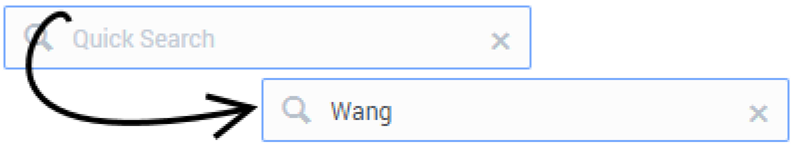
Chronology slider



The chronology slider lets you search the contact history for interactions that took place within a certain time period. The slider has four positions:

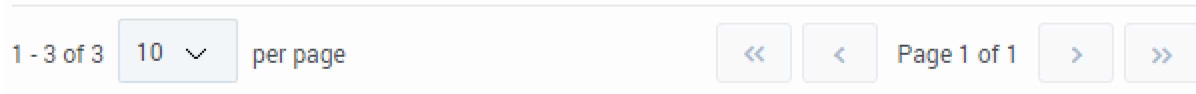
- **All**—Search the entire database from the most recent interaction back to the earliest interaction
- **Last Month**—Search the database from the most recent interaction back to one month ago
- **Last Week**—Search the database from the most recent interaction back to one week ago
- **Last Day**—Search the database from the most recent interaction back to one day ago

Quick Search

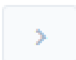


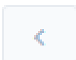
In the Quick Search field, you can enter the name or other information, such as a phone number or email address, of a contact, then click the magnifying-glass icon to begin the search of the contact database.

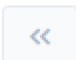
Page controls

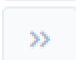


Page through the list of search results by doing any of the following:

 = Go to the Next Page

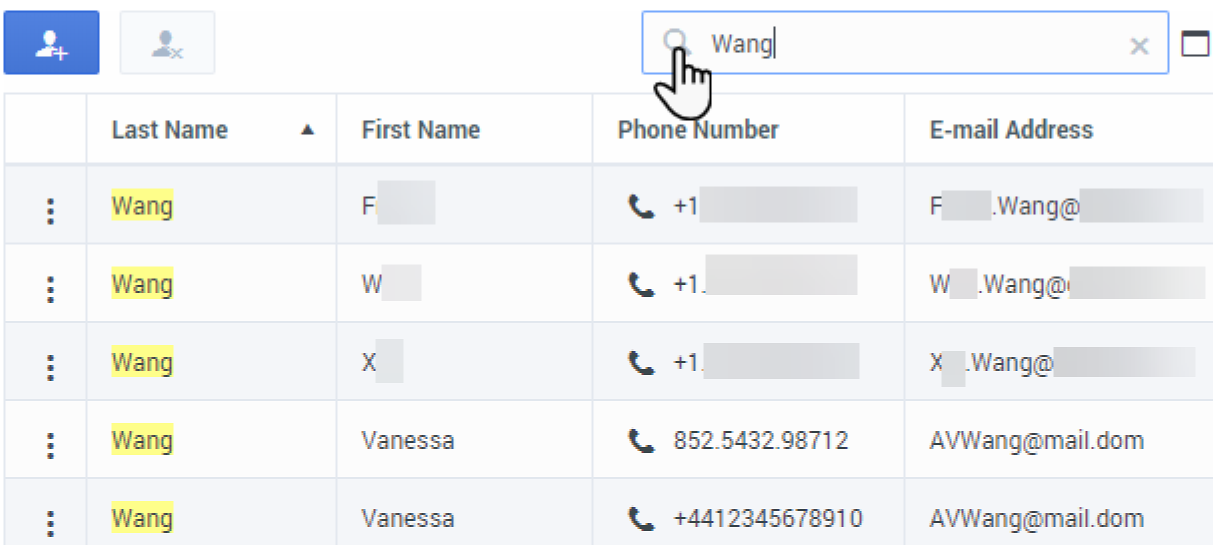
 = Go to the Previous Page

 = Go to First Page

 = Go to Last Page

Specify the number of items that are displayed on each page by using the **per page** drop-down list.

Grid views



In the Grid view, search 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.

Show/Hide panel details

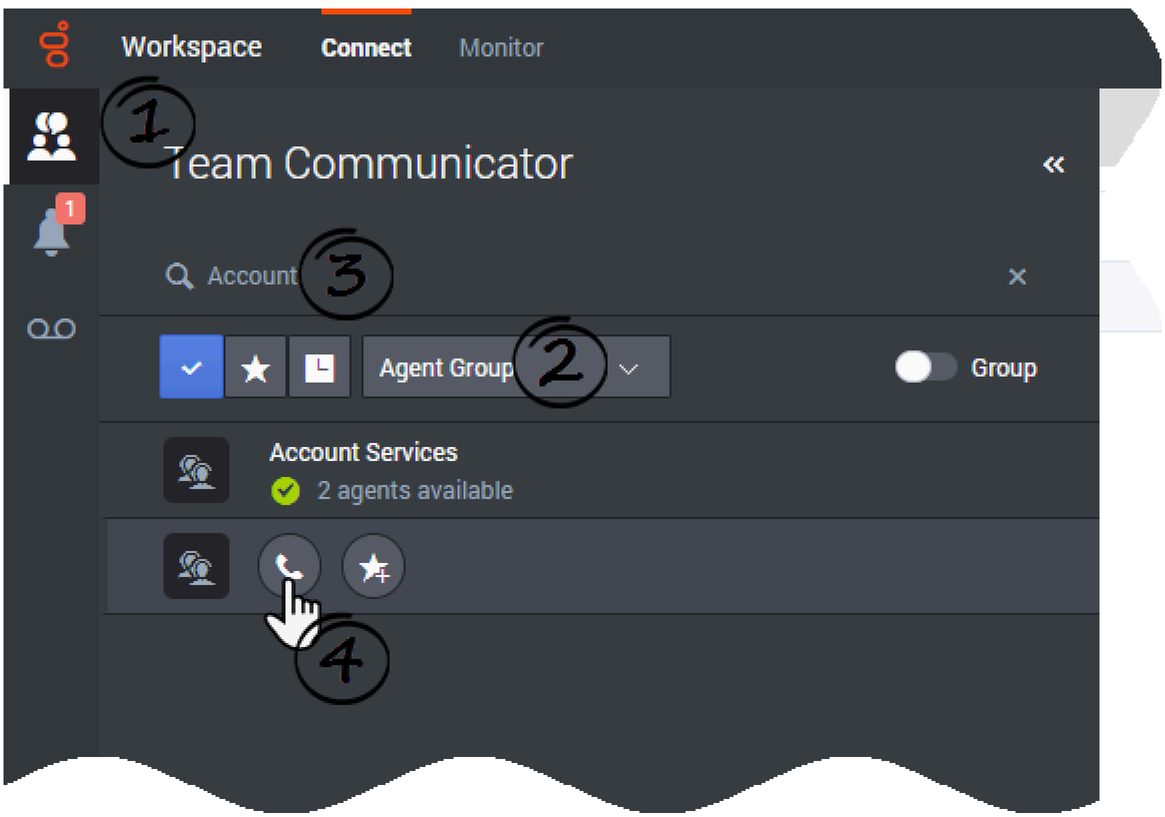
The **Show Details Panel/Hide Details Panel** button (▭) enables you to specify how the Details panel is displayed. The details panel can be shown or hidden, and, when shown, can be displayed to the right of the window.

Click the **Show Details Panel/Hide Details Panel** button to choose one of the following views:

◧: Displays the Details panel to the right of the workspace area.

▭: Hides the Details panel.

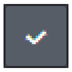
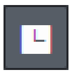
Team Communicator



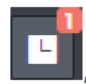
Team Communicator lets you find someone in your company's internal directory (such as a team member, a routing point, or an agent group), and sometimes someone outside your company, such as an external resource person or even a customer contact. It's useful for getting help or consulting with someone while working with an interaction.

To start a call, just click in the Team Communicator search field and start typing a name or number.

You can also filter the search results by using these buttons:

-  to search all contacts
-  to search your favorites
-  to search recent contacts
- 

 to group (or ungroup) your results by category or type

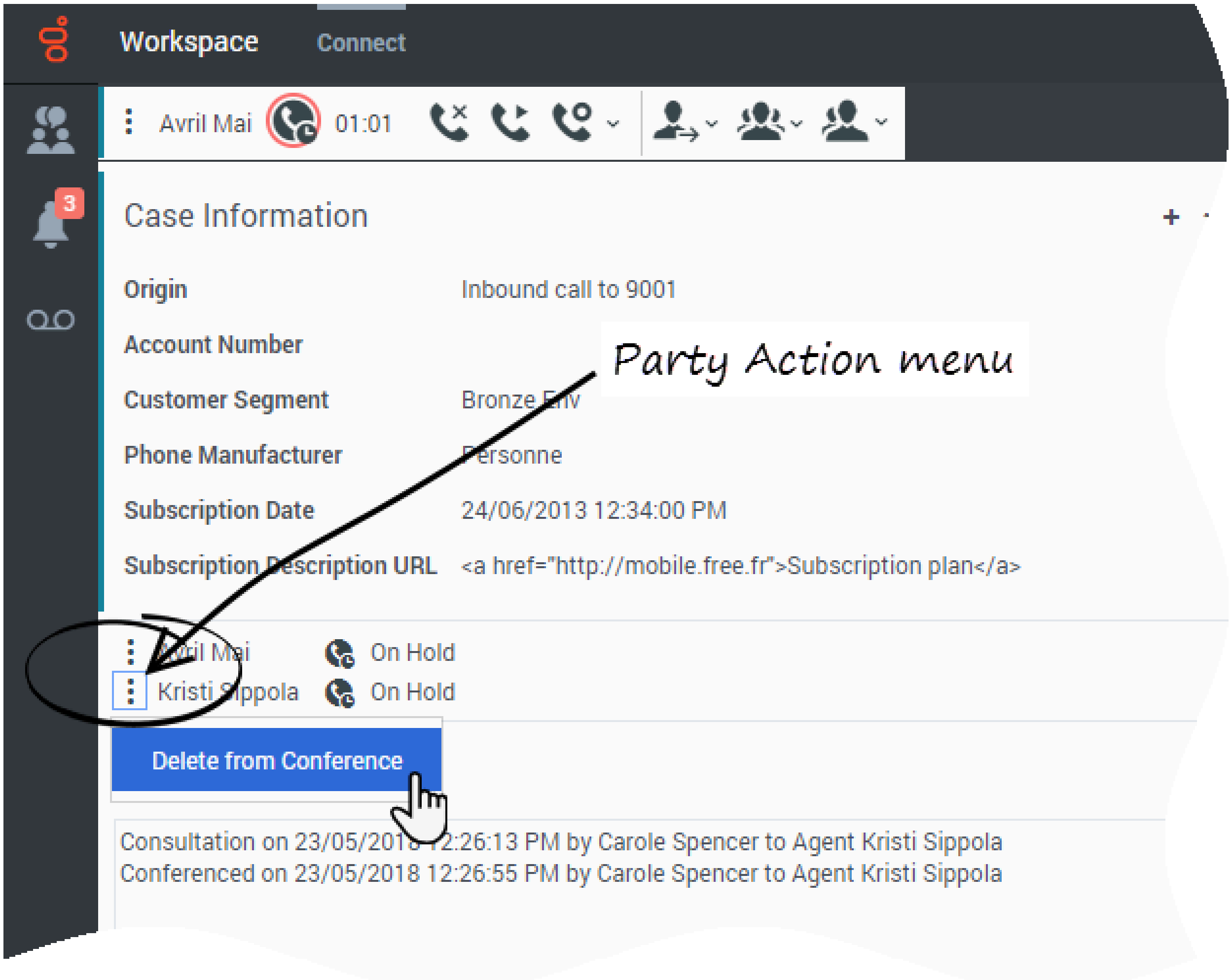
If you miss a call, a red indicator is added to the clock button, like this: 

, to tell you how many calls you missed. Click it to display the following information about any missed calls: date, time, and known contact details.

Tip: When you close the Team Communicator, or if you switch the filter to All contacts or Favorite contacts, the red indicator on the **Recent** button disappears if you have viewed your recent and missed calls, or if you have called back all of your missed calls.

When you are on a call and your call becomes disconnected, use the Team Communicator to call back your contact by filtering on **Recent** contacts.

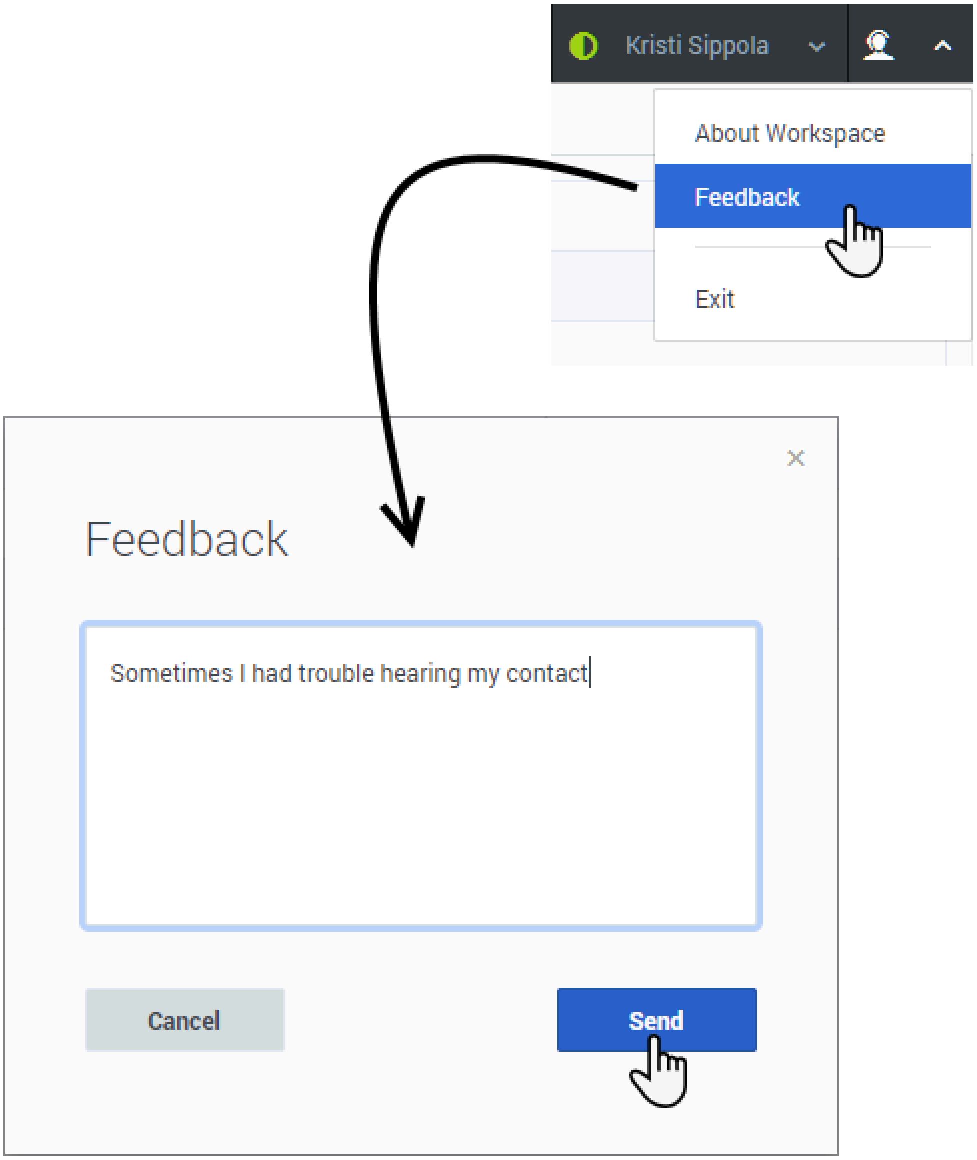
Party Action menu



The **Party Action** menu is a part of every interaction. You can use it during an interaction to launch a secondary interaction or carry out other actions.

The **Party Action** menu can be used to launch an email interaction while you are talking to a contact. You can also use the **Party Action** menu to call back the contact if you become disconnected.

How to provide feedback when something goes wrong



Sometimes web-based applications don't work as expected. There might be network connection issues, or the system that sends you phone calls, emails, and chats might be slow or behaving in odd ways. Sometimes the sound quality of a phone call is bad. Sometimes an error message is displayed on your desktop.

These and other issues are problems that you should report to your supervisor. Open the **Main** menu and select **Feedback** to open the **Feedback** window. Describe the problem or suggestion by typing in the text box, then click **Send** to submit your feedback. Your administrator might limit the number of characters that you can send as feedback; if you exceed this limit a warning message is displayed to you. Edit your comment before sending it to ensure that it does not exceed the character limit. This information, along with logs about what you were doing in your most recent Workspace Agent Desktop session, are sent to Genesys and are available to Customer Care for later reference.

If for some reason Workspace Agent Desktop becomes disconnected from your network you can reconnect by one of the following methods:

- Refresh your browser. If the **Unable to connect** dialog box is displayed, click **Login**.
- Close your browser, launch a new one, and log in again.

Workspace automatically opens the **Connection Lost** window when you reconnect. Click **Continue** to open the **Feedback** window so you can write a report about the disconnection problem immediately.

After you complete a feedback report, please tell your supervisor about it. He or she might want to call Genesys Customer Care about the problem and will be able to refer to the feedback you just submitted.

Keyboard navigation and accessibility

Agent Desktop lets you navigate the interface entirely by keyboard. This means that you don't have to use a mouse to activate different features or select buttons.

It also means that you can use a screen-reader application to perform all the functions you need.

Whenever an event happens in Agent Desktop, like you get a new interations or an error message is displayed, Agent Desktop makes a sound to alert you.

All the different ways that you can use the keyboard and a screen-reader to move around are described in this section.

Agent Desktop lets you use keyboard shortcuts combinations for some common actions. Ask your administrator for a list of the shortcuts that are set up for Agent Desktop.

Shortcut key combinations

A shortcut is a combination of keys that you press to make something happen in an Agent Desktop window.

OS shortcuts

The computer operating system also has shortcut keys to let you copy, cut, paste, undo, delete, find, maximize window, minimize window, open menu and select command, switch application, cancel, change focus, and so on. Consult your operating-system documentation for a list of supported keyboard shortcuts.

Agent Desktop shortcut keys

Agent Desktop supports three shortcut key combinations that you can use to make you more productive. These are the default shortcuts (your administrator might have set up different shortcuts for you):

- **Alt+N** — Jump to the next interaction if you have multiple interactions open
- **Alt+B** — Jump to the previous interaction if you have multiple interactions open
- **Alt+L** — Jump to the last error message that you received

Keyboard navigation

Agent Desktop supports keyboard navigation for all features, functions, options, and menus.

If you do not use a mouse or if you are using a device for accessibility that needs keyboard navigation, you can still use all the Agent Desktop features. Many *expert users* prefer to use keyboard navigation to maximize productivity.

Colors and appearance change as you select different items on the Agent Desktop. For example, buttons change color and menus open with the current selection highlighted by color.

Basic navigation using the TAB key

The simplest way to navigate by keyboard is to use the **TAB** and **SHIFT+TAB** keys.

- **Tab**—Moves your focus to the next menu, field, button, view, and so on.
- **Shift + Tab**—Moves your focus to the previous menu, field, button, view, and so on.

Movement occurs from left to right and from top to bottom, unless the ordering of components dictates otherwise. Navigation moves from component to component within a view, and from view to view within the application.

Navigation Shortcuts

This table shows you the keyboard shortcuts that let you control Agent Desktop without using a mouse.

Agent Desktop keyboard shortcuts

Shortcut	Description
Left Arrow	• Move left in a menu bar or out of a submenu. • Move to the next tab on the left. • Move left in the history slider.
Right Arrow	• Move right in a menu bar or out of a submenu. • Move to the next tab on the right. • Move right in the history slider.
Up Arrow	Move up in lists and menus.
Down Arrow	Move down in lists and menus.
Alt+Down Arrow	Open a selected drop-down list.
Enter	For a modifiable list, apply the edit mode, or validate the modification. For a button, execute the associated action. For a menu item, execute the associated action.
Space	For some controls, select or clear the check box that has the focus.
Escape	For a modifiable list, cancel the edit mode.

What next?

- Calls
- Watch "How to" videos
- Internal interactions
- Contact and interaction history

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

Team Communicator

Important

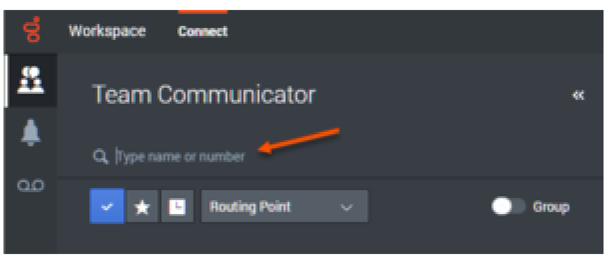
This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Team Communicator.

The Team Communicator is a feature that lets you to find someone in your company's directory (an internal target) or someone from outside your company (like a contact) who has their information stored in the contact directory.

How do I start a call or an email message?

To start a voice call or an email interaction, just click in the Team Communicator and start typing information about who you want to call or email.

You can enter a name, part of a name, a phone number, or an email address into the Team Communicator field and immediately start a call or email message to that person. Your administrator might set up your system to restrict whom you can search for.



Watch video: Finding a Contact

Link to video

You might be dealing with a customer who has an issue that you need help to resolve. Just use the Team Communicator to start a voice call with the person in your company or outside your company who can help you.

The Team Communicator is part of the Main View, and it is also available in the following views Interaction windows (for transfer, conference, and consultation actions):

- Voice
- Chat

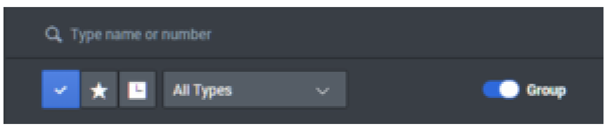
- Email

Type a name or number in the Team Communicator text field to begin your search. When you click in the field, the Team Communicator toolbar is displayed. The toolbar enables you to search All, your Favorite, Corporate Favorite, or Recent contacts and internal targets. It also enables you to filter by contact or internal-target type and to group or ungroup your search results.

In the Main View

How do I use the Team Communicator in the Main View?

The Main View contains the Team Communicator **Quick Search** field. The **Quick Search** field is a universal-lookup tool. The tool can search both the contact database and the internal-target directory. Your system administrator might have configured it to provide universal contact lookup or simply to provide internal-target lookup.



Starting a call or email

When you select Team Communicator, a toolbar is displayed. Enter a name, telephone number, or other keywords in the field to begin your search. As you type, the Team Communicator suggests known agents, contacts, and other resources.

Click the name of the person that you want to contact from the results list.

You can still start an interaction with someone who is not in your company database by typing in the full telephone number or email address and then clicking the Call or Email button.

The toolbar enables you to filter your search results of contacts and internal targets by types of calls or contacts:

- Search all contacts ()
- Search favorite contacts ()
- Search recent contacts ()

It also enables you to filter by contact or internal-target type, and to group or ungroup () your search results by category or type.

Your system might be set up to alert you if you have missed a call.

Click in the Team Communicator text field to open the Team Communicator. If you have a missed call, the **Show and search recent** () button has a red flag next to it displaying the number of missed calls. Click the button to see the list of missed calls. A small downward pointing outlined arrow icon is displayed beside the number of the party who called you. If you hover your mouse pointer over the contact entry, a tooltip displays the missed call information, including date, time, and known contact details.

In the Team Communicator, a contact who has called recently has one of three small arrows displayed beside the contact's name.

-  — A solid downward pointing arrow indicates an answered call
-  — An upward pointing arrow indicates an outbound call to the contact
-  — An outlined downward pointing arrow indicates a missed call

To get details about the call, whether answered, missed, or outbound, hover your mouse pointer over the contact name or number.

When you close the Team Communicator, or if you switch the filter to All contacts or Favorite contacts, the **Recent** button red flag disappears if you have viewed your recent calls and missed calls or if you have called back all of your missed calls.

Calling and Emailing

You use the Team Communicator to make a new voice call or email interaction.

Starting a New Interaction

To launch a new interaction (external or internal interaction), use the Team Communicator to find and select a target or contact. Enter the name of an internal target (agent, skill, agent group, or Routing Point) or a contact name, telephone number, or email address in the universal-lookup field.

As you type, Workspace Web Edition searches the internal target and contact databases and lists potential contacts and internal targets.

From the list, you can:

- Select the kind of interaction you want to launch, voice or outbound email.

You can use the Controls in Team Communicator to do the following:

- Filter and sort the list of search results.

- Perform actions on a selected contact for calling.

Watch video: Starting a new email

Link to video

Watch video: Making a new voice call

Link to video

Filter/Sort Your Results

Filtering and Sorting the List of Search Results

The Team Communicator search is a “keyword” search that checks each field of the contact database for the word or words (name, telephone number, or other criteria) you provide in the search field. Each field of the database is searched by using a “starts-with” search for the keywords you provide.

Results are returned in a list that is sorted according to the scoring rules. 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 agents or queues are displayed.

Result types might include the following:

- All types
- Agent
- Agent Group
- Routing Point
- Skill
- Contact
- Interaction Queue

Select the **Group** slider (Group) to arrange the search results by category. You can collapse categories by selecting the arrow displayed beside the name of the category.

Below the **Quick Search** field are four controls you can use to list previous contacts quickly.

From left to right, the buttons are the following:

- **Search All** — Select from all matching internal targets and contacts. Does not affect the sort order.
- **Show and Search my Corporate Favorites** — Click to show only contacts/internal targets that you have flagged as corporate favorites. Sort is by category or type.
- **Show and Search my Recent Contacts/Targets** — Select from the last 1 to 10 contacts/internal targets you have directly dialed,emailed, or monitored. Sort is by date.

- **Filter by Type** — Select the type to search, including Agent, Contact, Routing Point, Skill, Queue, Interaction Queue, and Agent Group.
- 

Sorting by Category/Sorting by Type — Select to sort by category or type.

Using Favorites

How do I use Personal and Corporate Favorites?

A favorite is someone with whom you interact frequently.

The Workspace Team Communicator enables you to mark contacts and internal targets (like other agents, your supervisors (team leads), or call routing) as your personal favorites. This is useful if you have a supervisor that you need to contact regularly for help about specific types of customer issues or a routing point to which you must regularly direct certain types of inquiries.

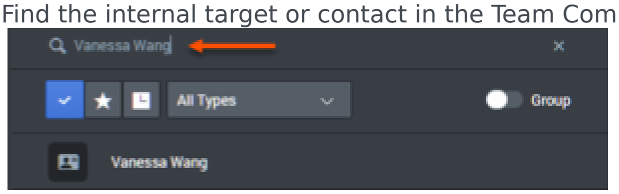
You can also "unfavorite" (remove) a contact or target from the list of favorites when you no longer need to quickly find them.

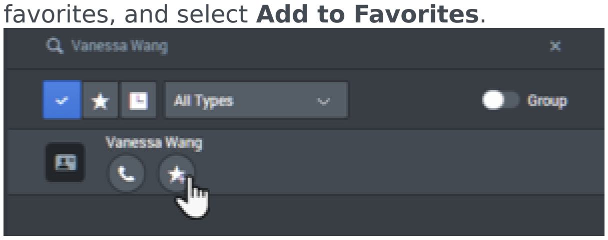
Your administrator might also have chosen for you specific targets as "corporate favorites". In Team Communicator, corporate favorites are marked by a locked star icon (). This means that you cannot "unfavorite" (remove) them from the list of favorites. Your administrator might designate corporate favorites for you that change based on your role in the company or by the contact with whom you are currently interacting.

The favorites that you choose are marked by a white star ().

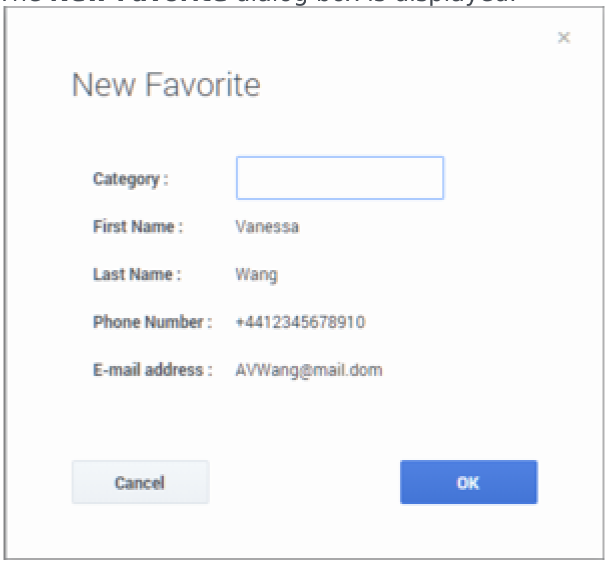
Choosing Personal Favorites

To help you to find contacts and internal targets quickly, use the **Action Menu** in the Team Communicator next to the name of the contact or target. Follow these steps:

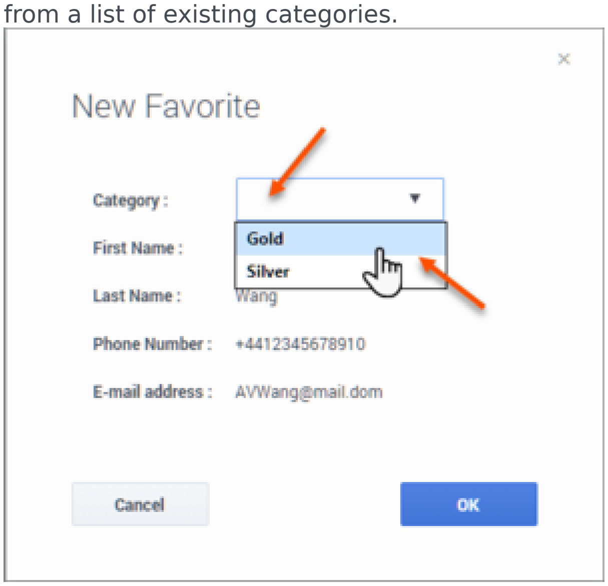
1. Find the internal target or contact in the Team Communicator.


2. Hover you mouse pointer over the name of the internal target or contact that you want to add to your favorites, and select **Add to Favorites**.


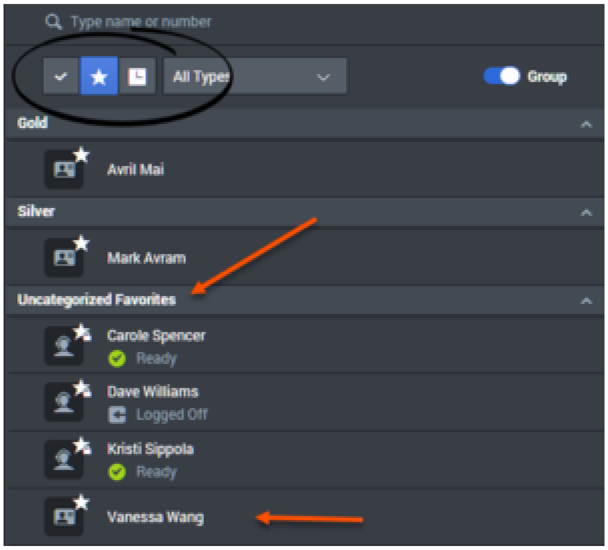
The **New Favorite** dialog box is displayed.



- If you want, use the **Category** drop-down list to define a new category for your favorite, or select from a list of existing categories.

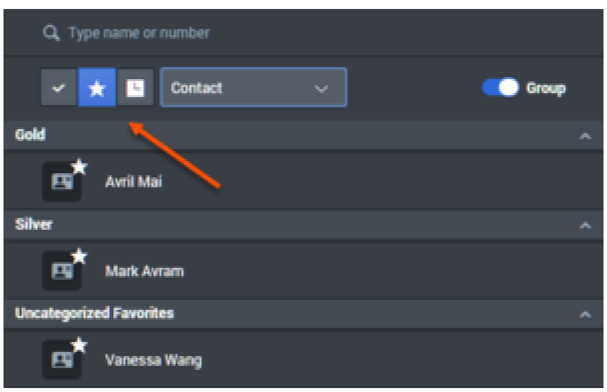


- Click **OK** to add the internal target or contact as a favorite. If you did not choose a category, and you choose to view favorites by category in the Team Communicator, the new favorite is listed in the **Uncategorized Favorites** category.

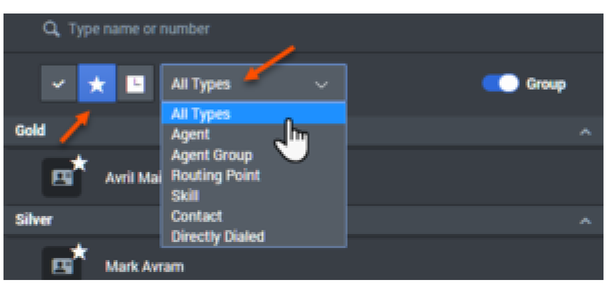


Viewing and Managing Your Favorites

When you want to see the complete list of your personal and corporate favorites, click in the Team Communicator search field, then click the **Favorites** filter button (see the figure below).

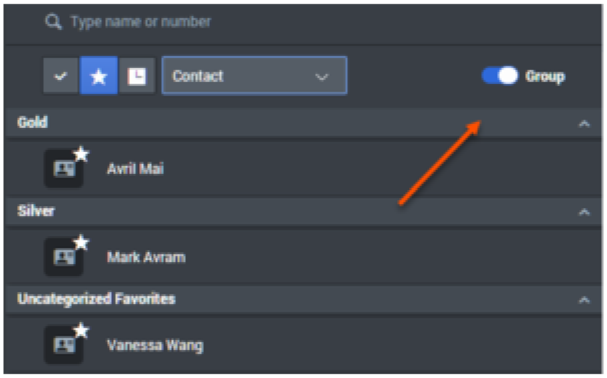


Use the Type filter drop-down list to change the types of contacts and targets are listed in the Team Communicator. You can view just agents, contacts, agent groups, routing points, or skills, or you can view all types of targets.



Use the Sorting by Category button to arrange the list of favorites into their designated categories.

Any favorites that have not been assigned to a category are listed in the **Uncategorized Favorites** category.



Important

A favorite that you created by directly dialing a contact will appear only in Favorite search and in your list of recent calls if you previously called the person. If you do not apply the Favorites filter to your search, only the following object types are searched: Agent, Contact, Routing Point, Skill, Queue, Interaction Queue, and Agent Group.

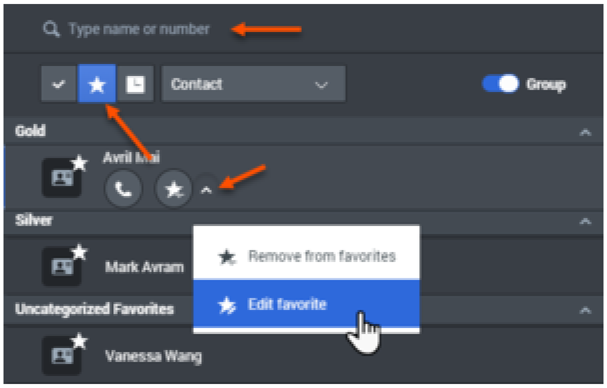
You can edit a favorite to add, remove, or change a category. Select **Action Menu** next to the Favorites button ( ) to display and use the **Edit Favorite** dialog box.

You can remove an internal target or a contact from your list of favorites by selecting **Remove from Favorites** ( ) from the **Action Menu**.

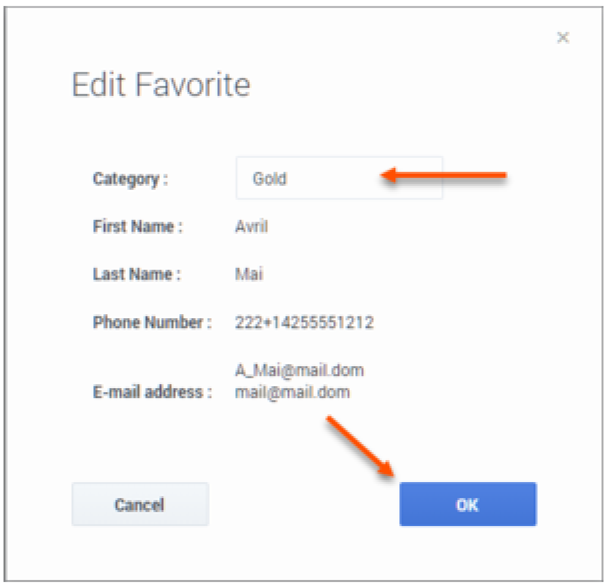
Editing the Category of a Personal Favorite

When you want to add, remove, or change the category that you have assigned to a favorite contact or other target, you can use the Team Communicator to edit the category.

First, use Team Communicator to find the favorite either by entering the name in the search field and/or by clicking the **Favorites** button ( ). Next, open the **Action Menu** next to the name of the contact or other target and select the **Edit favorite** option.



The **Edit Favorite** dialog box is displayed. Make the change to the category by editing the content of the Category field. You can modify the category, delete the category, or change the category.

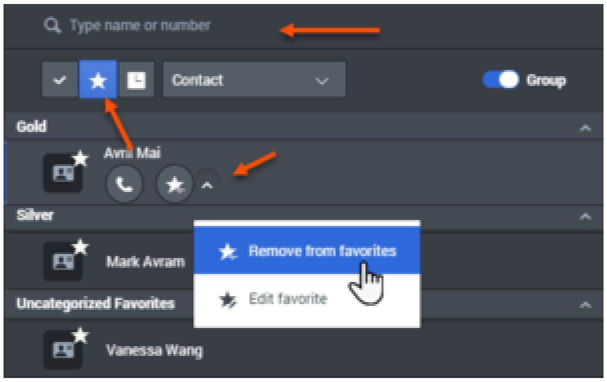


Click **OK** when you are done to save the modification.

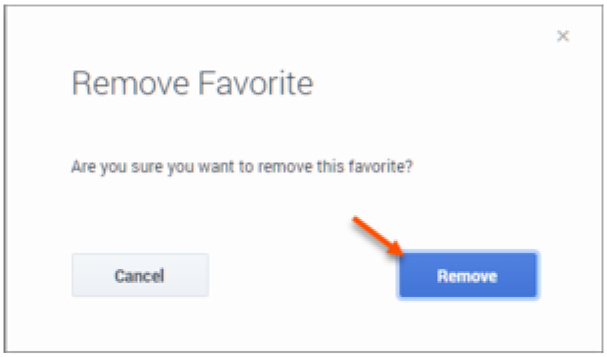
Removing a Personal Favorite

When you no longer want a contact or other target that you have added as a favorite to be on your list of favorites, you can use the Team Communicator to remove the favorite.

First, use Team Communicator to find the favorite either by entering the name in the search field and/or by clicking the **Favorites** button (). Next, open the **Action Menu** next to the name of the contact or other target and select the **Remove favorite** option.



A confirmation dialog box is displayed when you choose **Remove favorite**. Click **Yes** if you are sure that you want to remove this contact or target from your list of personal favorites. Click **No** to keep the contact or target on your list of personal favorites.



Important

- 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.

What next?

- Internal interactions
- Calls
- Chat
- Email

- Workitems

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

"How To" Videos

> **Important**
>
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Videos: Using Workspace.

A collection of videos from the Genesys Vimeo channel that demonstrate some of the most commonly used features of Workspace Agent Desktop.

> **Important**
>
> Some Workspace Agent Desktop features are available only for Genesys Engage cloud users.

Intro to Agent Desktop

Link to video Link to video

Managing Your Status

Link to video

Dealing with Disconnections

Link to video

Handling a Call

Link to video Link to video Link to video Link to video Link to video Link to video Link to video

Handling Email

Link to video Link to video Link to video Link to video Link to video Link to video Link to video

Handling Chat

Link to video Link to video Link to video Link to video

Handling Workitems (Open Media)

Link to video

Using Standard Responses

Link to video

Managing Contacts

Link to video Link to video Link to video

Finding Interactions

How to find interactions in the Interaction Database:

- My History

Basic My History search

Link to video

Advanced My History search

Link to video

- Interaction Search

Basic Interaction history search

Link to video

Advanced interaction history search

Link to video

- Contact History

Basic Contact history search

Link to video

Advanced Contact history search

Link to video

Workbins

Overview

Link to video

Finding interactions in workbins and interaction queues

Link to video

Outbound Calling Campaigns

Overview

Link to video

Automatic record retrieval (Predictive and Progressive)

Link to video

Manual record retrieval (Preview)

Link to video

Semi-automatic record retrieval (Push-preview)

Link to video

Semi-automatic record retrieval (Direct Push-Preview)

Link to video

What next?

- Navigating Agent Desktop
- Calls

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

Channels and the Channels tab

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Channels and the Channels tab.

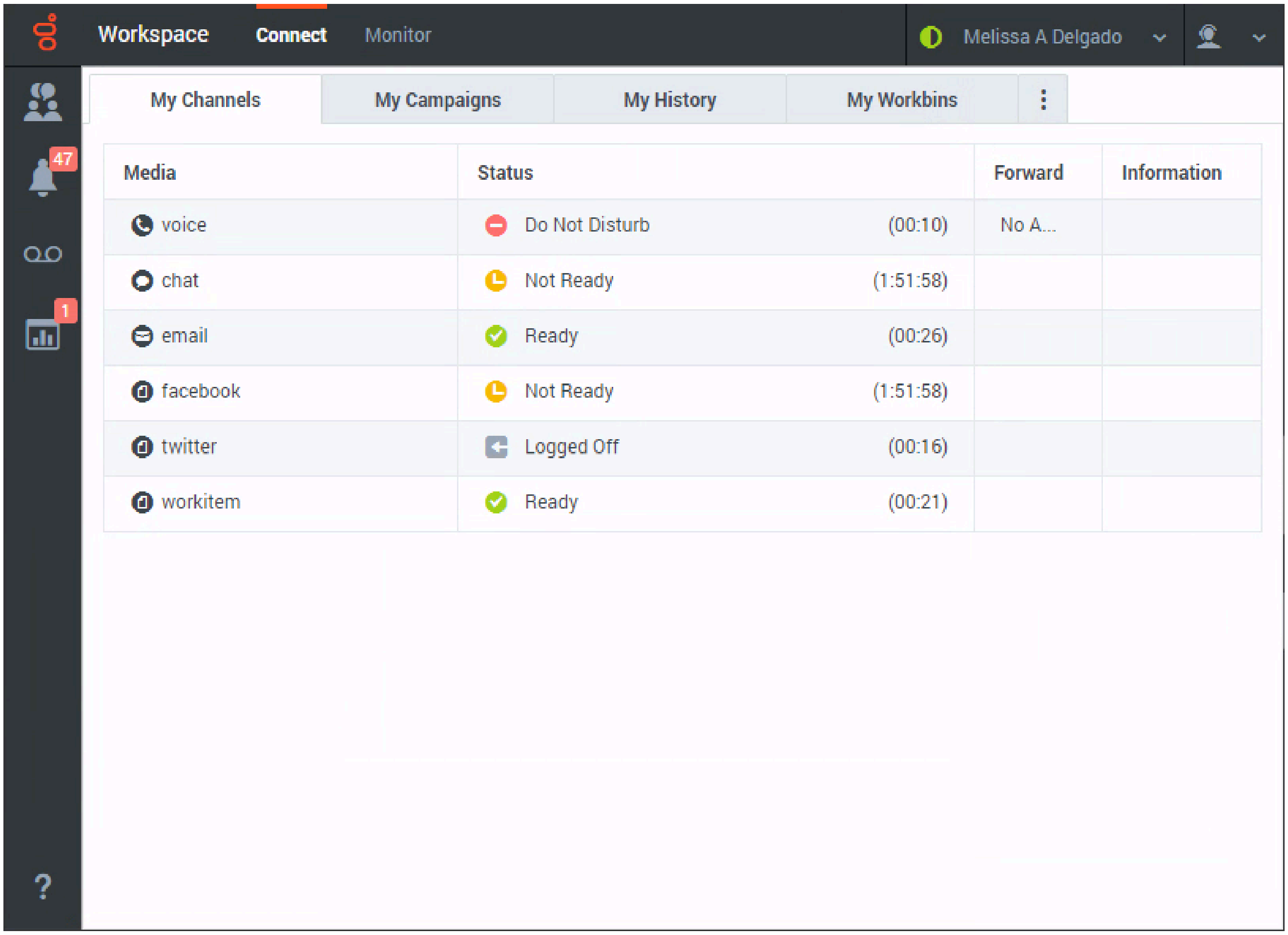
Channels are the different methods that you use to communicate with customers and team members in your contact center. Channels include the voice channel and Digital channels such as chat and email. Use the Channels tab to set your status on your assigned channels.

Important

Due to continual changes to Agent Desktop, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you see in the product when you use it.

Each channel lets you communicate with your contacts in different ways. You can make and receive phone calls (known as the Voice channel). You can also receive and reply to emails, and interactive live chats, Facebook messages, Tweets on Twitter, and Workitems such as faxes and PDFs. You can also use a co-browse session to navigate your company website with a contact.

What can I do in the My Channels tab?



Use the **My Channels** tab to:

- Change your status on a channel
- Log off from a channel
- Turn on/off your Do Not Disturb status (applies to all channels)
- Forward calls that are directed to your extension to another extension

Why can't I see all the channels?

Depending on your assignment, you might have all, some, or just one of the channels available to you.

What happens to my status when I mark an interaction as Done?

The answer depends on your account setup.

You might have to mark an interaction as **Done** before you can close the interaction view.

When you click **Mark Done**, your status might automatically change from **After Call Work** to **Ready**, **Not Ready**, or some other value, or you might have to manually set your status to **Ready**, or some other value, after you complete your after call work.

You might be allotted a certain amount of time after each call to perform After Call Work (ACW). If so, your status for the voice channel will be **After call work** until the time interval has passed, then it might change to **Ready** or **Not Ready**. You might also be able to extend your after call work time indefinitely, if a call requires more than the usual amount of after call work.

What next?

- Calls
- Chat
- Email
- Customer interactions
- Internal interactions

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

Calls

Important

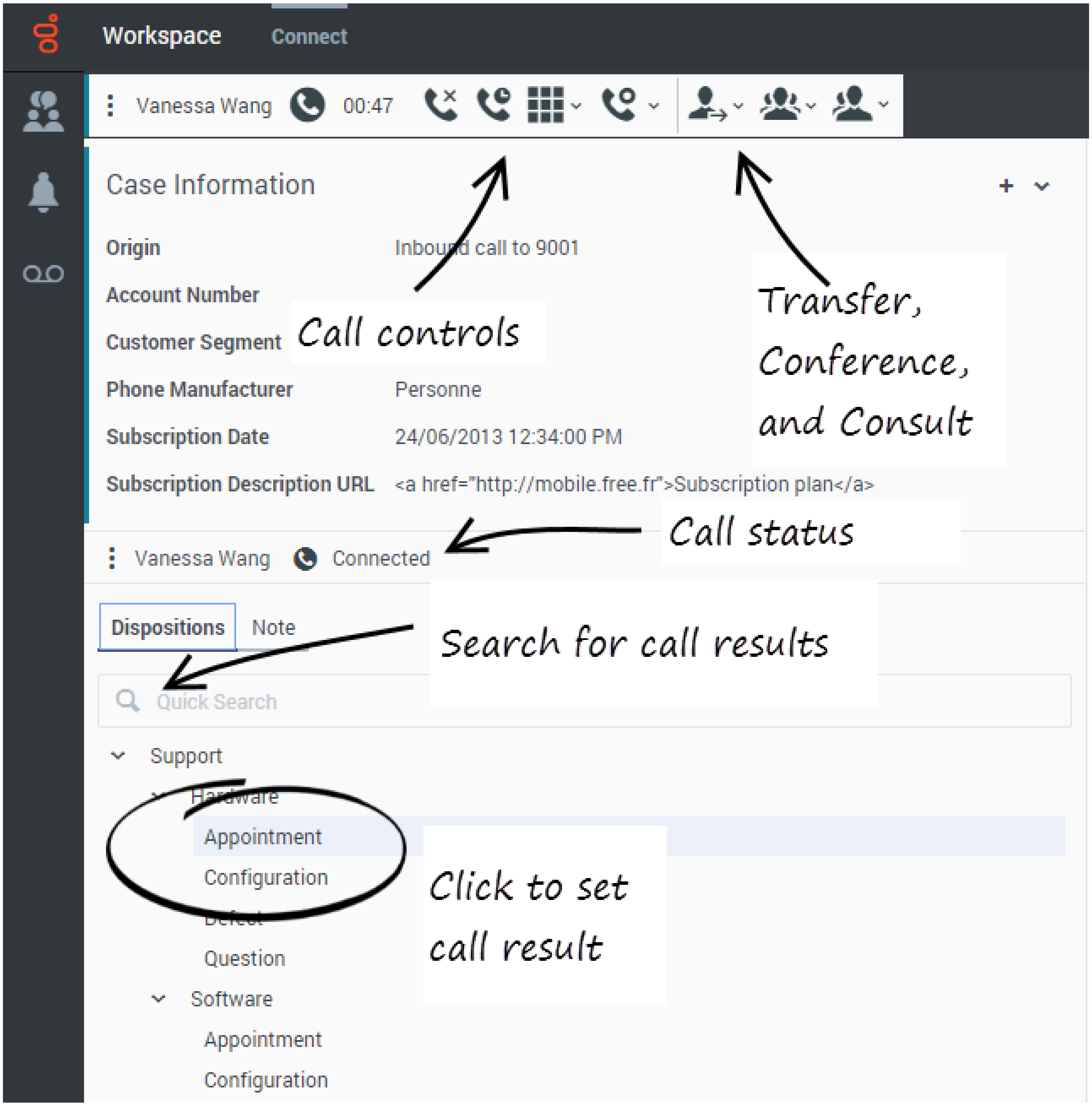
This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Voice Calls.

The controls and features that let you handle voice interactions with contacts or team members.

Important

- Due to continual changes to Agent Desktop, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you see in the product when you use it.
- Some Workspace Agent Desktop features are available only for Genesys Engage cloud users.
- Some Workspace Agent Desktop features are available only for Genesys Engage on-premises users.

How do I handle an incoming call?



- Handle it myself
- Handle it myself with help
- Transfer it
  - Instantly 

    - After a consultation
- End the call 

If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

What is a voice interaction?

A voice interaction is a view that is displayed on your Agent Desktop when you accept an inbound call.

It includes all the call controls, information about the call (Case Information), and Disposition and Note tabs where you can add information about the call.

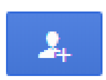
There might also be tabs on the right side of the view that contain contact information, history, and other features.

Use the **Contact** tab to review the contact information, such as name, phone number, and email address.

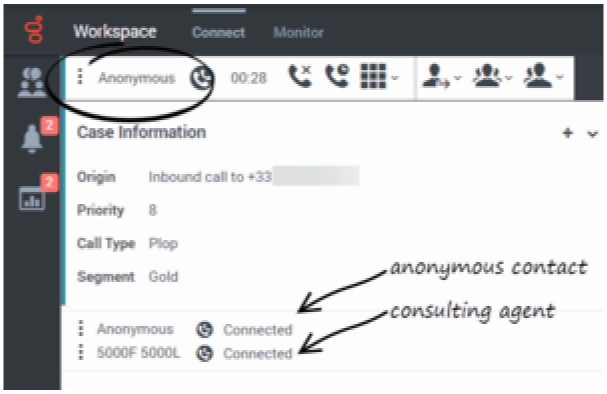
What if the caller is Anonymous?

In some contact centers, inbound calls might be anonymous. In this case, there is no information to identify the contact in the interaction view or in the **Contact** tab.

If an anonymous caller provides you with Personally Identifiable Information (PII) and it is your corporate policy to add the PII to the **Contact** tab, then the caller is no longer anonymous and Agent Desktop will search for the contact in the contact database. Enter the PII into the contact search field and select the contact from the search results then click **Assign** to assign the interaction to the contact.

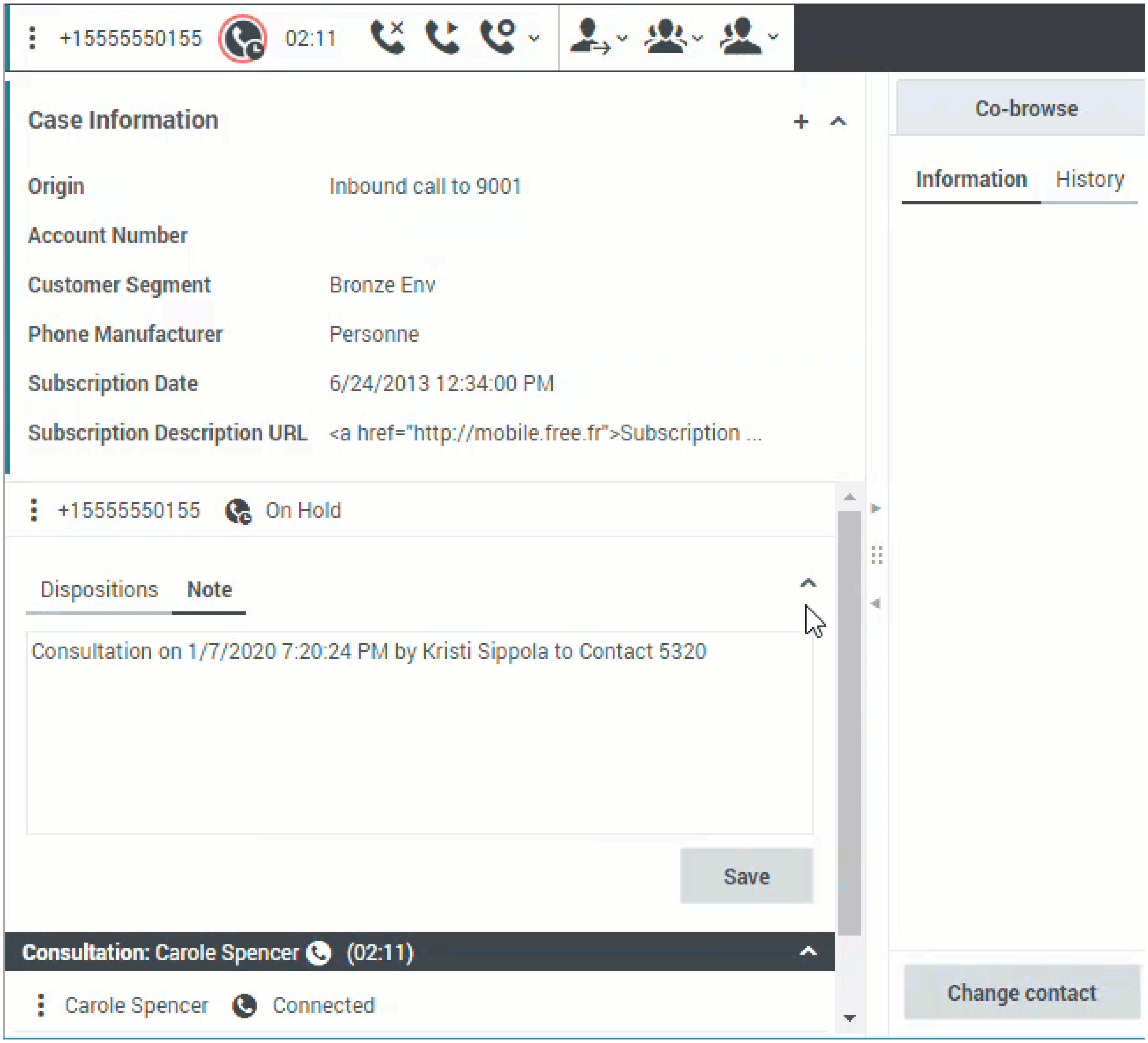
If no matching contact is found, click  to create a new contact. Add the contact information and click **Save**.

If you transfer, conference, or consult the call, it remains anonymous to the other party. The call also remains anonymous to Supervisors monitoring the call.



How do I expand or collapse panes to avoid scrolling?

Use the little chevrons (up/down arrows) to expand or collapse different parts of the interaction view to give yourself more room to work or to enable you to focus on just one pane.

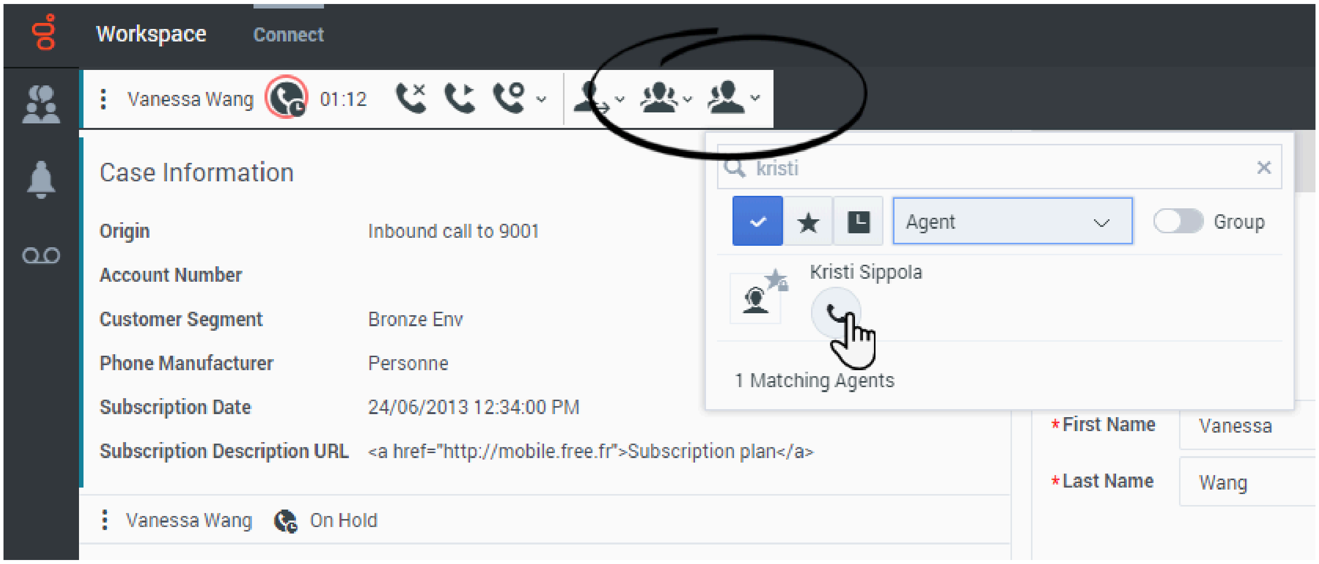


Handling a call videos

Here are some quick videos to show you some of the things you can do while handling a call.

Link to video Link to video Link to video Link to video Link to video Link to video

Where can I get help to handle a call?



- Start a consultation
- Start a conference

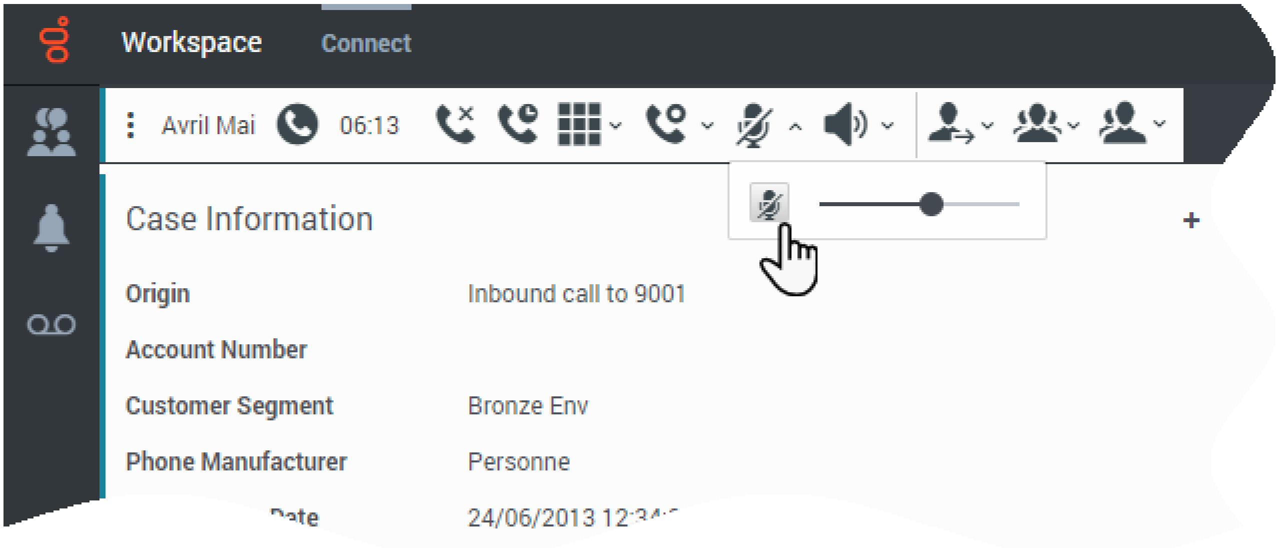
If you want to perform a warm transfer or a two-step transfer, click **Consult** to talk to the consultation target and then click **Transfer** to transfer the call.

What other actions can I take during a call?

You can:

- Record the call
- Hold and resume
- Dial digits without using your phone. For instance, you can use this dialer when you are navigating a phone system.
- View and modify contact information in the **Contact** tab.
- View the contact's interaction history in the **Contact** tab.
- Sometimes Workspace is unable to assign a call to a contact or it assigns the call to the wrong contact. Your account might be set up to let you assign or change a contact in the **Contact** tab.

How do I control the volume of my headset and mute myself?

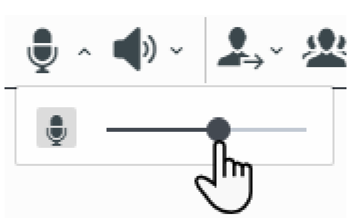


If you use Genesys Softphone, your administrator can set up the controls for your microphone and speakers on your headset to let you mute and unmute yourself and/or your contact, and let you control the volume of your microphone and speakers.

Depending on how things are set up, you might see different configurations of buttons:

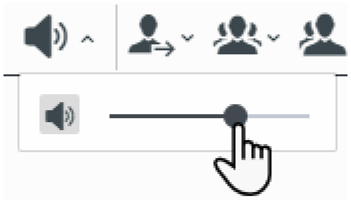
- Mute/unmute your microphone

- Adjust the volume of your microphone

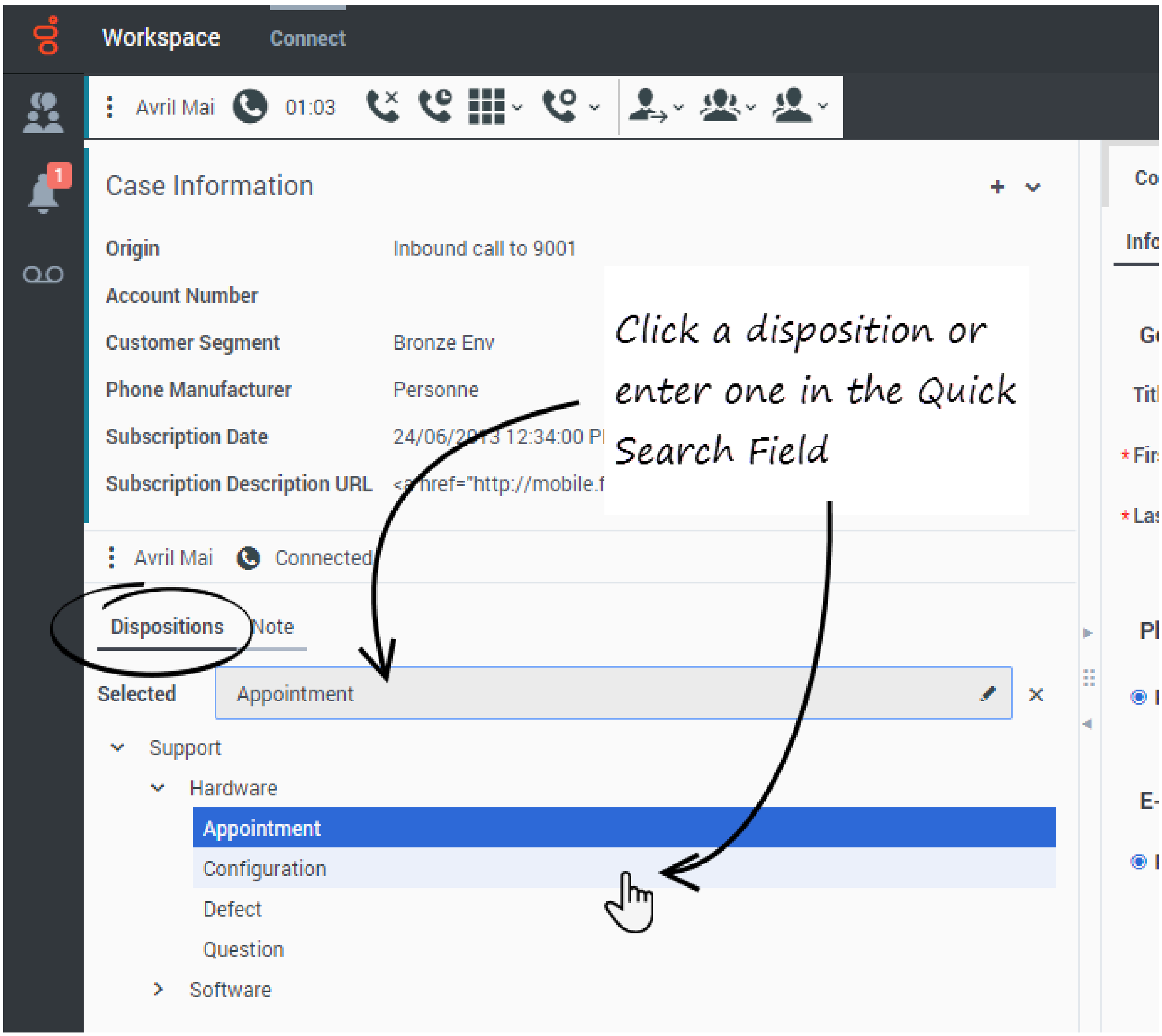


- Mute/unmute your speaker

- Adjust the volume of your speaker

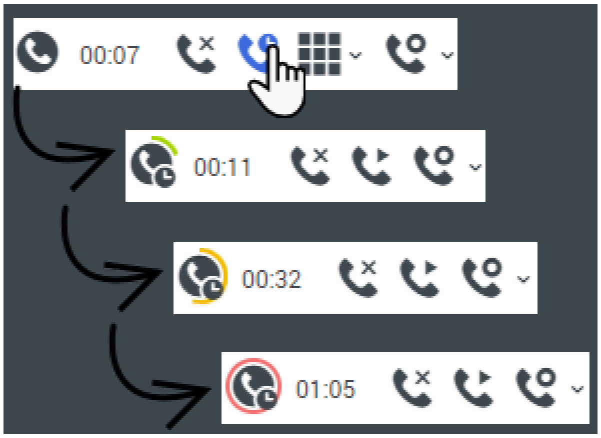


What do I do at the end of a call?



- End call
- Select a disposition code if required
- Mark Done
- Change status as needed

What happens when I put someone on hold?

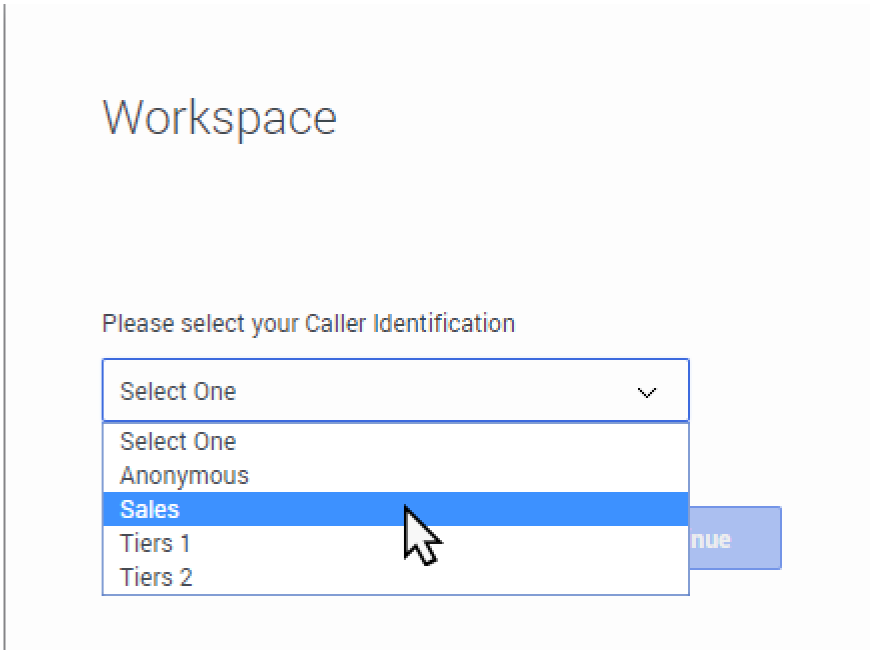


You can see how long you have placed a caller on hold, if enabled.

After you click **Hold** ( ), a timer and progress bar begin to count the seconds that the call is on hold.

The progress bar changes from green to yellow to red as time goes by. If the progress bar changes to red, the call has been on hold too long and you should click **Resume** ( ) to update the contact and let them know that they are still on the call.

How do I manually select a Caller Identification?



When you make a call, you might have to choose a Caller Identification to be displayed on the phone of the contact. This feature might also be enabled for calls that you are transferring or conferencing.

The person you call sees the Caller ID you select. The previous Caller ID that you selected is selected by default. To hide your identity, you can select `Anonymous` if available. Ask your supervisor about when to use this feature.

How do I record a call?

The Call Recording functionality enables you to record the current voice interaction with a contact or an internal target. Agent Desktop supports two different types of call recording: **emergency recording** and **controlled call recording**. Your system administrator configures the type of call recording that is supported in your environment.

If your account is set up for emergency recording, you can start and stop recording by using a single toggle button.

If your account is set up for controlled recording, you can start a recording, pause a recording, resume a recording, and end a recording.

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

Call recording enables you to perform the following functions:

- **Record the call** — Select Record the Call ( ) to record a call.
- **Stop recording the call** — Select Stop Recording the Call ( ) to stop recording a call that you are currently recording.
- **Pause recording the call** — Select Pause Recording the Call ( ) to pause recording a call that you are currently recording. Not all agents might have this feature.
- **Resume recording the call** — Select Resume Recording the Call ( ) to resume recording a call that is currently paused recording.

> Tip
>
> Your account might be enabled for either voice recording or screen recording. You can use the call recording buttons to control both voice recording and screen recording.

When you are recording a call, the call icon in the connected-parties area changes to red.

When you pause a call recording, the red call icon changes back to gray.

A Tooltip indicates both that the call is being recorded and the length of time of the recording.

A call-recording icon ( ) is displayed in the title bar of the Main View when a call recording is active.

How do I forward my calls?

> Important
>
> Call forwarding might not be available in your environment.

To forward calls to a different extension or phone number, on the selected media channel, in the Forward column, click No Active Forward and **Forward**.

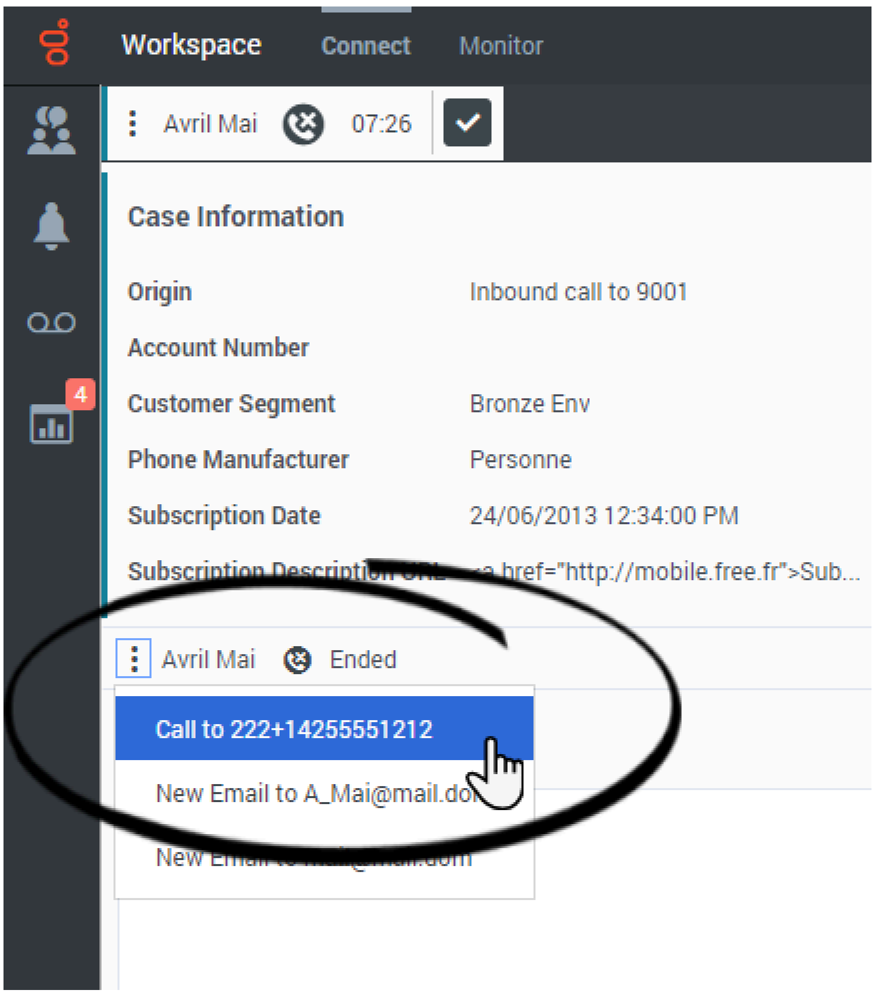
This action opens the Forward dialog box. Enter the number to which you want to forward your calls and click **Apply**. Click **Cancel** to return to the My Channels tab without forwarding your calls.

If you have an Active Forward set and you want to disable it, on the voice channel, in the Forward column, select **Forwarded to <number>**, and select **Cancel Forward to <number>**.

In the Cancel Forward dialog box, select **Yes** to cancel the forward; this removes the active forward and changes the Forward status to **No Active Forward**. To keep the forward active, select **No**.

> **Important**
> When an Active Forward is set, no call is received by the application.

How do I call someone back?



If you are handling a call and the call drops you can call the contact back either by opening Team Communicator, filtering for Recent Calls ( ), and selecting their name, or by opening the **Party Action** menu and selecting the contact's phone number from the pop-up menu.

What next?

- Contacts
- Team Communicator
- Internal interactions

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

Outbound campaigns

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Outbound campaigns.

As an agent, you might work on campaigns (for example, collections, telemarketing, or fundraising) where you make outbound calls to contacts. You can view and manage your campaigns from the **My Campaigns** tab.

What types of campaigns are available?

You might be working with one of the following campaign types:

- Progressive or Predictive campaigns, in which the system automatically sends you a number to dial.
- Preview campaigns, in which you manually request (or *pull*) a number to dial from the system.
- Push-Preview campaigns, in which the system automatically sends you a record to preview, then you click to connect the call.
- Direct Push-Preview campaigns, in which Outbound Contact Server automatically sends you a record to preview, then you click to connect the call.

Video Tutorial: Outbound Campaigns

Here are four tutorial videos that give you a quick overview of being an agent in an Outbound Campaign. The first video introduces Outbound Campaigns, the second demonstrates Predictive and Progressive (automatic) campaigns, the third demonstrates Preview (manual) campaigns, and the fourth demonstrates Push-Preview (semi-automatic) campaigns.

Outbound Campaign Overview

Link to video

Automatic record retrieval (Predictive and Progressive)

Link to video

Manual record retrieval (Preview)

Link to video

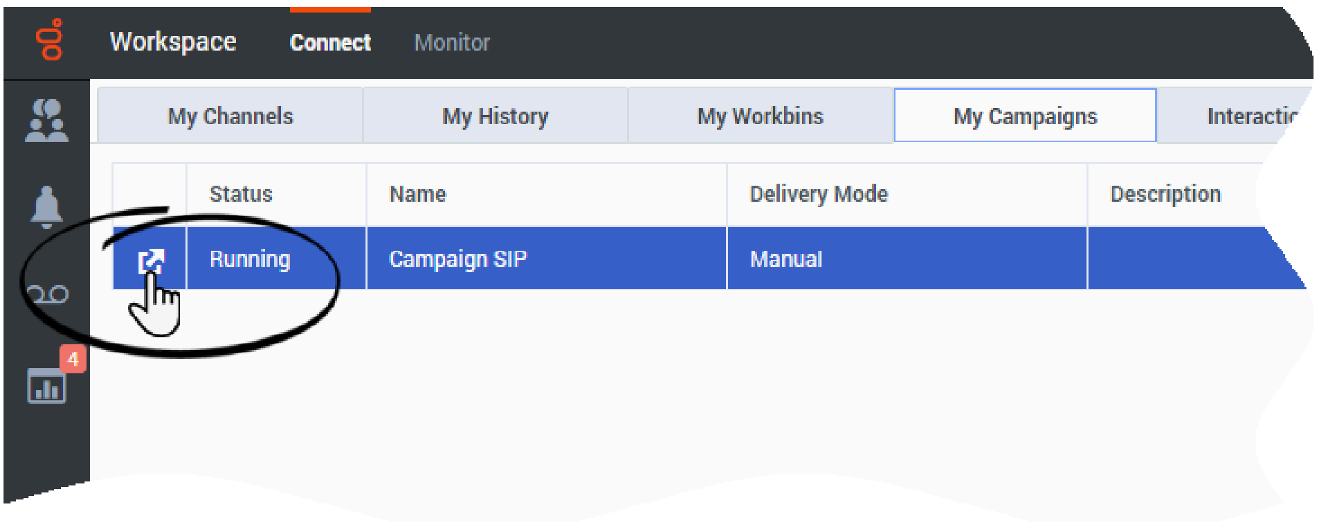
Semi-automatic record retrieval (Push-Preview)

Link to video

Semi-automatic record retrieval (Direct Push-Preview)

Link to video

How do I use the My Campaigns tab?



You can find the **My Campaigns** tab in the **Connect** view of the Main Window.

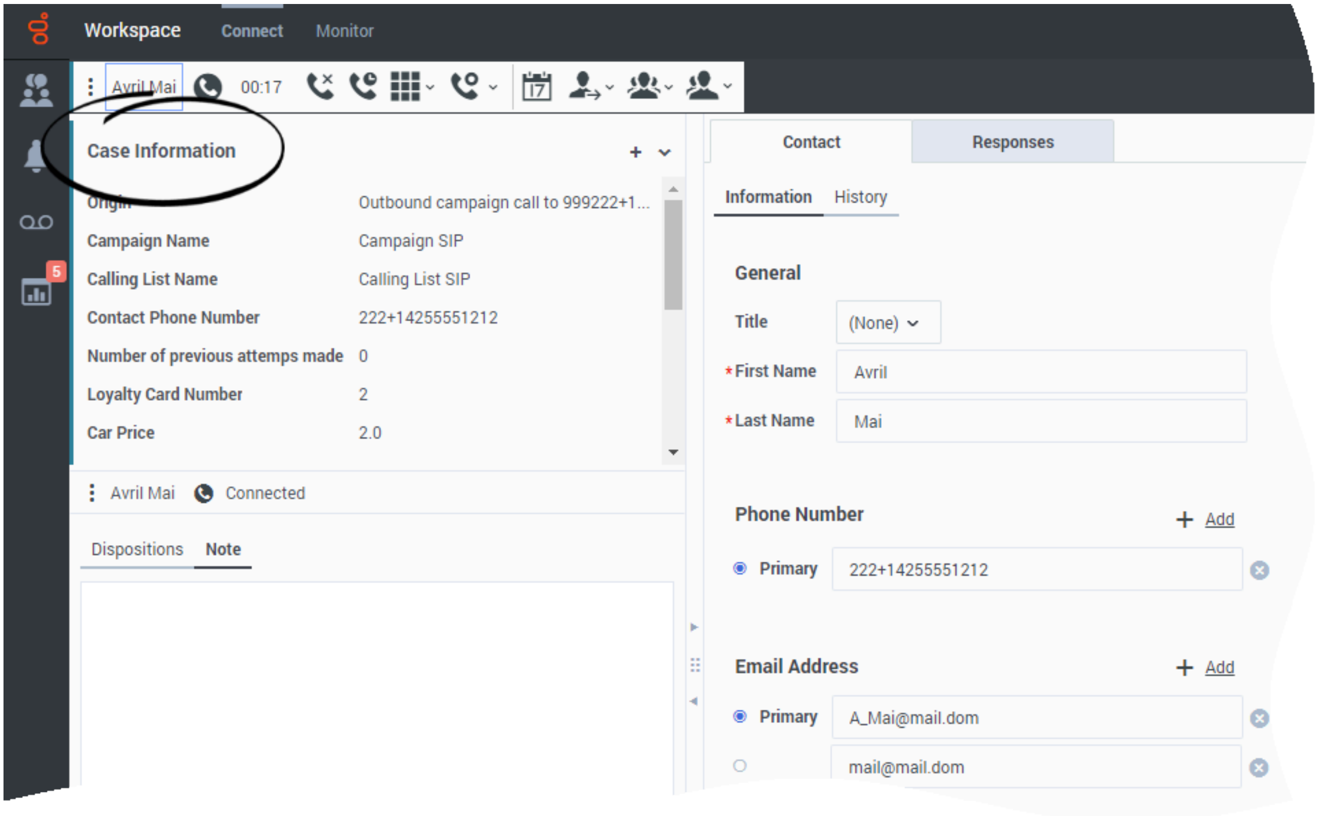
This tab lists all the campaigns that are active or running to which you belong.

The table contains information about each campaign, including **Status** (Active or Running), **Name**, **Delivery Mode** (Manual or Automatic), and a **Description** of the campaign provided by your company.

When you want to get a new calling record, select the campaign you want to work on and click **Get Record** ().

In some campaigns, records are delivered to you automatically whenever your status is **Ready**. If you have selected **Done and Stop** in a campaign and you are ready to resume receiving receiving records, select the campaign you want to work on and click **Get Record**.

How do I work with Progressive and Predictive campaigns?



In campaigns using Progressive and Predictive dialing modes, outbound calls are directed to your workstation and dialed automatically.

You'll get a pop-up notification each time an administrator loads or starts a new campaign that you are part of. When you get the Campaign Started pop-up, click **OK** to close the notification.

If your status is Ready, a new interaction preview appears. You can then **Accept** to connect the call, or **Reject** to return the record to the top of the calling list. If you do nothing, the interaction goes back to the top of the calling list. In some environments, if you do not accept or reject the record notification before a time interval set up by your administrator, the record will automatically be rejected and your status will be set to **Not Ready**.

When you accept the record you are not connected to the outbound call until after the contact has answered the phone. The **Origin** of the call is the name and or number of the contact.

When you're connected to the contact, you can view the campaign call information, the Call Status, and the available Call Actions. Use the standard call controls to manage the call.

How do I work with Preview campaigns?

In campaigns using Preview dialing mode, you request a record from the system and then dial the contact. You can preview the case information and other details *before* you start the call.

You'll get a pop-up notification each time an administrator loads or starts a new campaign that you are a part of. When you get the Campaign Started pop-up, you can choose:

- **Get Record** to retrieve a contact record from the campaign list.
- **OK** to close the notification. (With this option you'll have to retrieve a record manually. Go to **My Campaigns**, select the campaign you want to use, and select **Get Record**.)

When you have previewed the record, use:

to call the contact. When the call is connected, you can monitor the call status and use the standard voice call controls to manage the call.

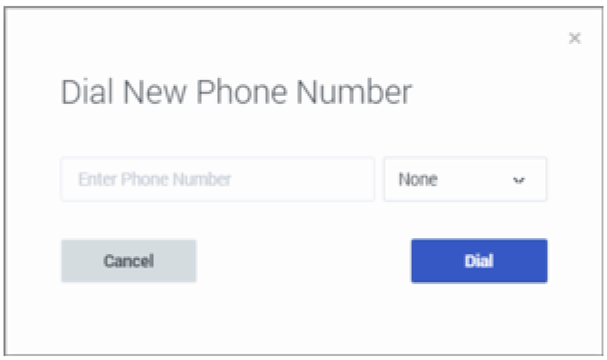
to decline the record. You can then choose **Call this contact later** to return the record to the campaign list or **Do not call this contact** to remove the contact from the campaign list.

to stop receiving previews (**Done and Stop**). To start receiving previews again, go to **My Campaigns**, select the campaign you want to use, and select **Get Record**.

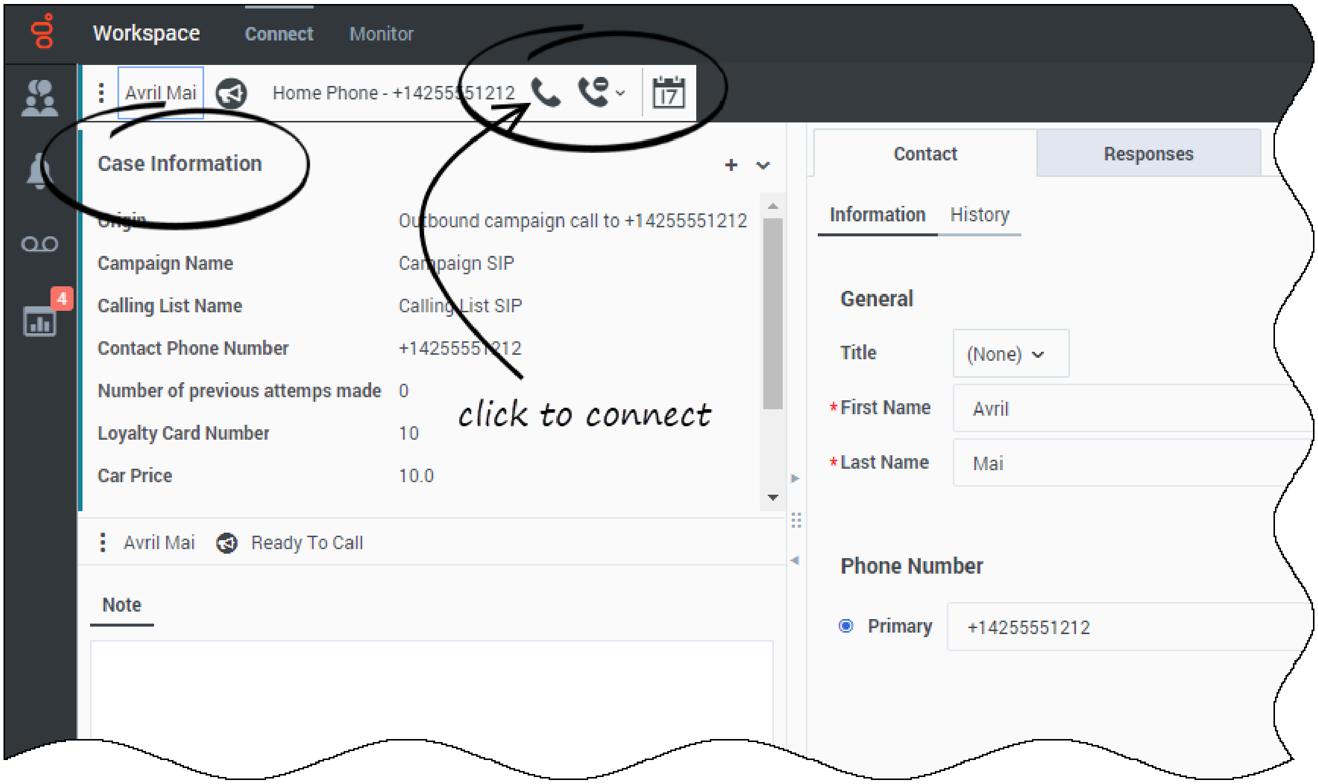
If asked, select the caller ID details you want to use.

Your administrator might set up the Preview campaign so that you have a time limit during which you can preview the interaction before it is dialed automatically. In this case, you'll see a timer next to the **Party Action** menu that counts down the time until the call is automatically connected if you do not click **Call** ( ). Some Preview campaigns connect the call automatically.

You might be required to manually dial a call due to local regulations. If this is the case, click the contact's phone number at the top of the interaction and either select the phone number, or, if you are required to do so, select **Dial New Phone Number**. When the **Dial New Phone Number** window is displayed, type the phone number into the **Enter Phone Number** field, select the phone number type from the drop-down menu, then click **Dial**.



How do I work with Push-Preview campaigns?



In campaigns using Push-Preview dialing mode, a record is delivered to your desktop automatically from the system and then you dial the contact. You can preview the case information and other details *before* you start the call. You must be in a **Ready** status to receive records.

> **Important**
> In the **My Channels** tab, Push Preview is a separate channel from Voice. You must set the **outbound preview** channel to **Ready** to receive records.

You'll get a pop-up notification each time an administrator loads or starts a new campaign. When you get the Campaign Started pop-up, click **OK** to join the campaign.

If your status is Ready, a new interaction preview appears. You can then **Accept** to connect the call, or **Reject** to return the record to the top of the calling list. If you do nothing, the interaction goes back to the top of the calling list. In some environments, if you do not accept or reject the record notification before a time interval set up by your administrator, the record will automatically be rejected and your status will be set to **Not Ready**.

When you have previewed the record, use:

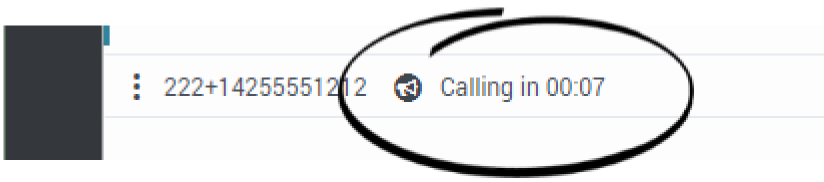
to call the contact. When the call is connected, you can monitor the call status and use the standard voice call controls to manage the call.

to decline the record. You can then choose **Call this contact later** to return the record to the campaign list or **Do not call this contact** to remove the contact from the campaign list.

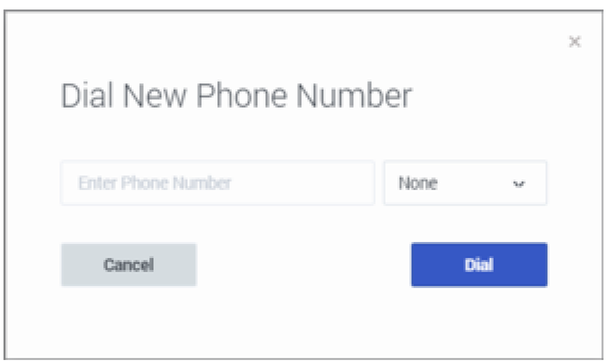
to close a record.

If asked, select the caller ID details you want to use.

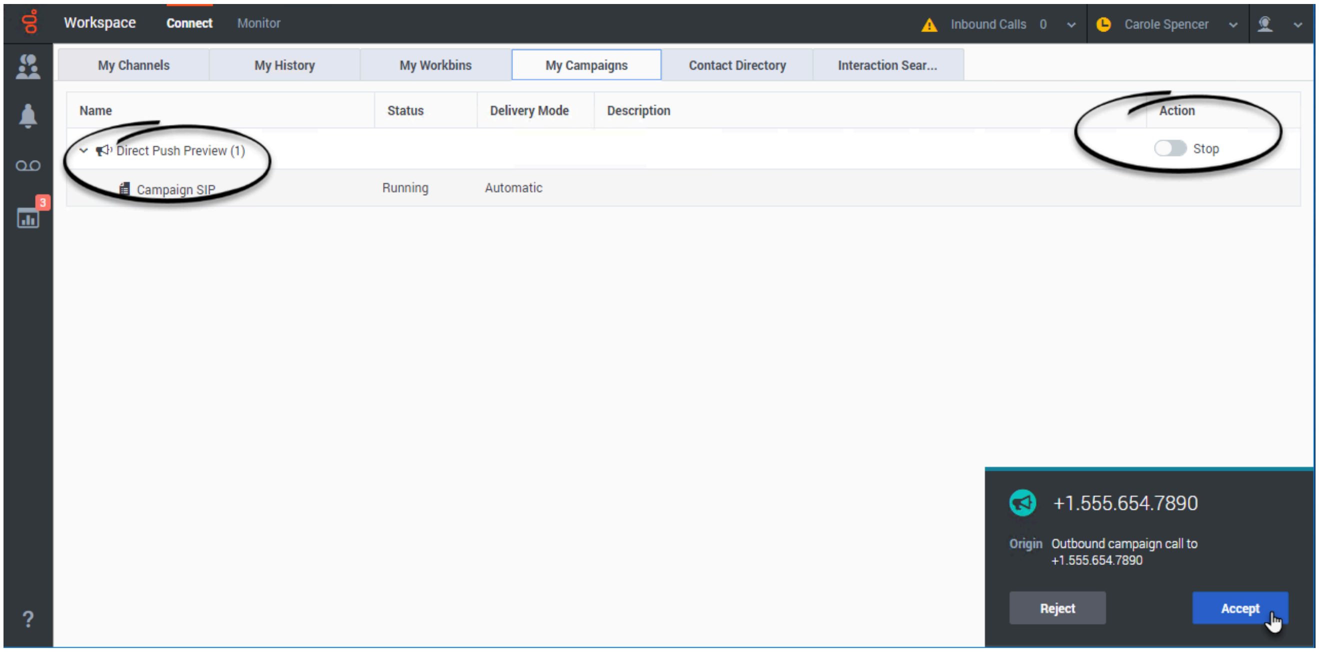
Your administrator might set up the Push-Preview campaign so that you have a time limit during which you can preview the interaction before it is dialed automatically. In this case, you'll see a timer next to the **Party Action** menu that counts down the time until the call is automatically connected if you do not click **Call** (). Some Push-Preview campaigns connect the call automatically.



You might be required to manually dial a call due to local regulations. If this is the case, click the contact's phone number at the top of the interaction and either select the phone number, or, if you are required to do so, select **Dial New Phone Number**. When the **Dial New Phone Number** window is displayed, type the phone number into the **Enter Phone Number** field, select the phone number type from the drop-down menu, then click **Dial**.



How do I work with Direct Push-Preview campaigns?



Link to video

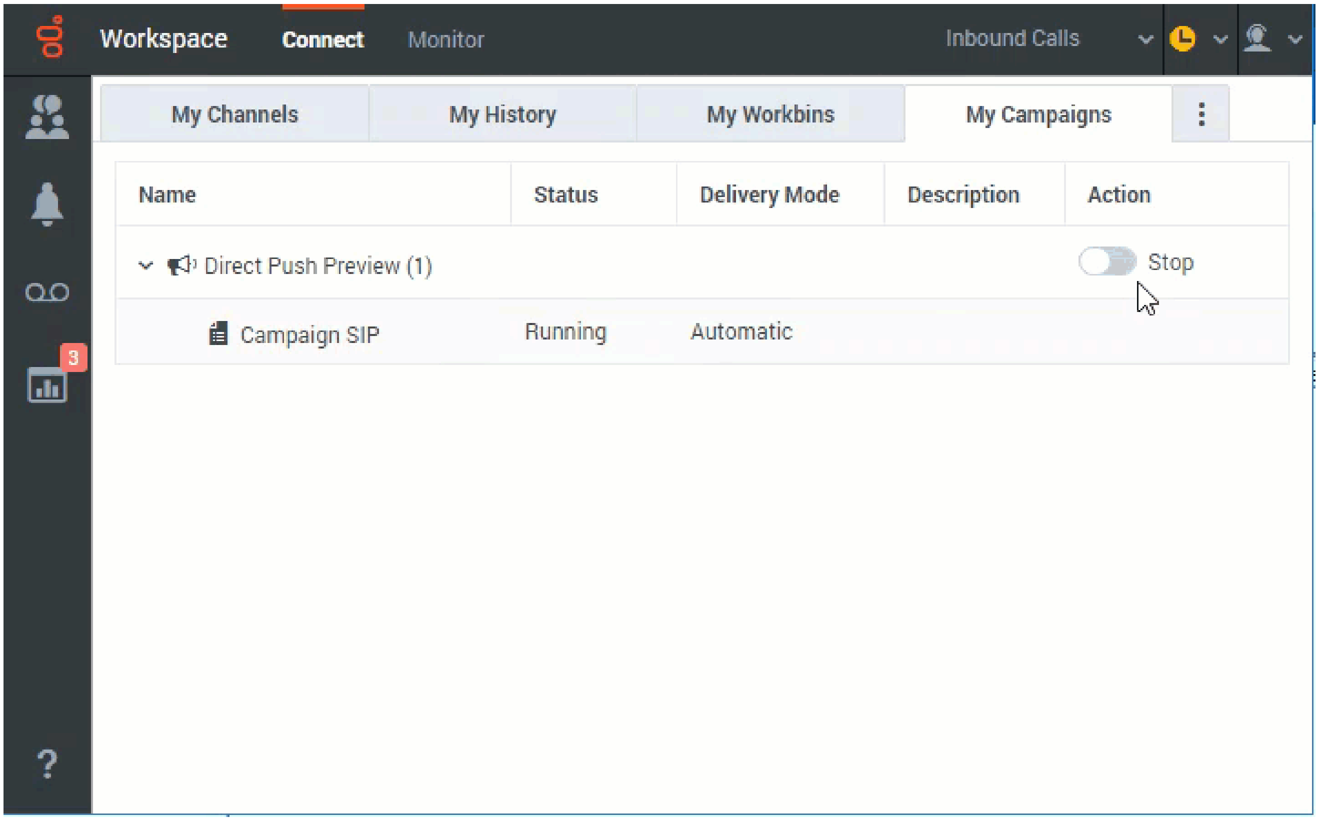
In campaigns using Direct Push-Preview dialing mode, a record is delivered to your desktop automatically from the system. You can preview the case information and other details in the pop-up call record notification *before* you start the call. After previewing it, you click **Accept** to dial the contact.

As with other Outbound campaign types, pop-up notifications inform you when a campaign assigned to you is loaded into the system and when it starts and stops.

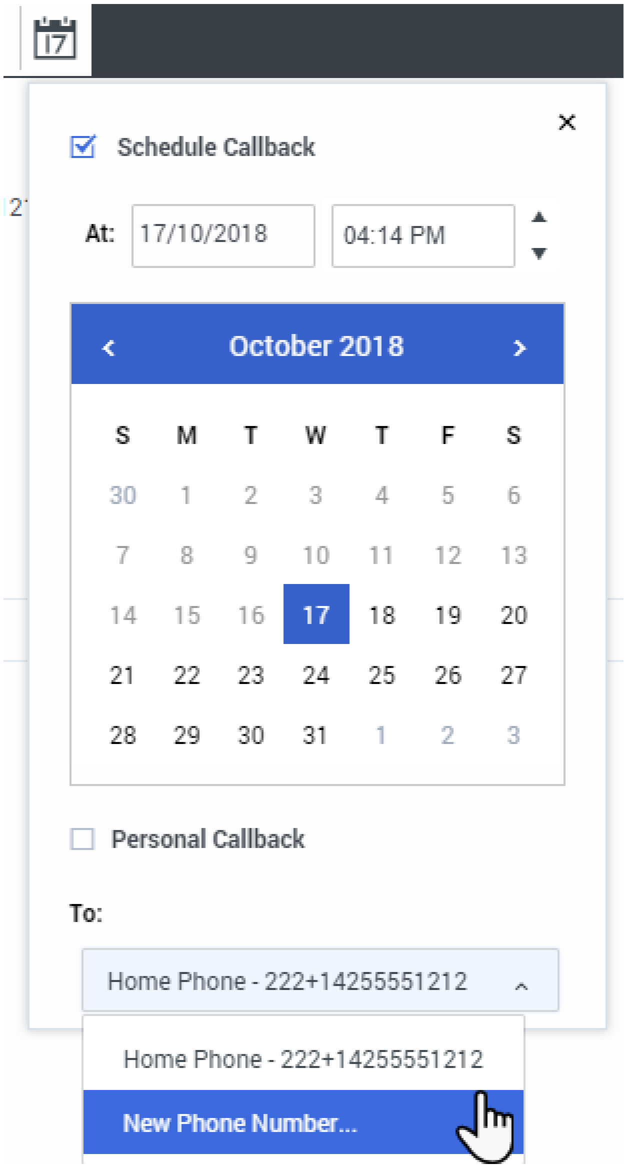
Check the **My Campaigns** tab to see which campaigns are assigned to you. Because Direct Push Preview campaigns ignores your Ready/Not Ready status you must use the **Get Record** (Get Record)/**Stop** (Stop) toggle in the **My Campaigns** tab in the **Action** column in the Direct Preview Campaign row to tell the system when you are ready to receive records and when you want to stop receiving records.

After handling an Outbound campaign call, click **End** to end the call and **Done** to mark it Done. You will then continue to automatically receive new calls until you select **Stop** in the **My Campaigns** tab or you select **Done and Stop** when you mark the interaction **Done**.

To start receiving previews again, go to the **My Campaigns** tab, select the campaign you want to use, and select **Get Record**.


Workspace
Connect
Monitor
Inbound Calls
My Channels
My History
My Workbins
My Campaigns
Name
Status
Delivery Mode
Description
Action
Direct Push Preview (1)
Stop
Campaign SIP
Running
Automatic
3
?

How do I schedule callbacks for a campaign?



During a campaign, you might not be able to reach the contact or they might request to be called back at another specific date and time. You can schedule a callback at any time while you are handling an Outbound campaign call, even after the call has ended.

The Schedule Callback button () opens the **Schedule Callback** window, where you can set a date, time, and even a different phone number for the callback. You can also specify whether the callback is personal (you will handle the callback) or whether any available agent will handle the callback.

Tip: During Preview campaigns, you might be able to use this feature to postpone a preview call before the call is dialed.

When you've set the desired properties for the callback, the Schedule Callback button changes to  to indicate that a callback is scheduled. You can then end the call.

If you need to make changes to a scheduled call back, you can open the Schedule Callback window and make changes to the settings.

To cancel a scheduled callback, clear the **Schedule Callback** box. This must be done *before* closing the Outbound Record or the Interaction Preview.

When a rescheduled callback is directed to your workstation, an interaction preview is displayed as usual. The only difference is that the Case Information includes an indication in the **Origin** field that the call is a **Callback** or a **Personal Callback**.

Note: You might see an error message displayed in the Agent Desktop interface when you try to mark done an Outbound interaction that you have rescheduled. This can happen if the specified rescheduled date and time are invalid (for example, you might have set the rescheduled date and time in the past). You must fix any errors or cancel the reschedule first before you can mark the interaction done.

What next?

- Change your status to Ready
- More about voice calls
- Internal interactions

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

Email

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Email.

Email is a Genesys Digital channel. The email interaction window enables you to view all of the information necessary to handle inbound and outbound email interactions with a contact.

Important

- Some Workspace Agent Desktop features are available only for Genesys Engage cloud users.
- Some Workspace Agent Desktop features are available only for Genesys Engage on-premises users.

How do I handle an inbound email?

Link to video

Typical actions you can take with an email are:

- to reply to the email, using your own message or a standard response.
- to reply all.
- to transfer the email to another agent.
- to save it in your workbin.
- forward to an external resource.
- to print the email.

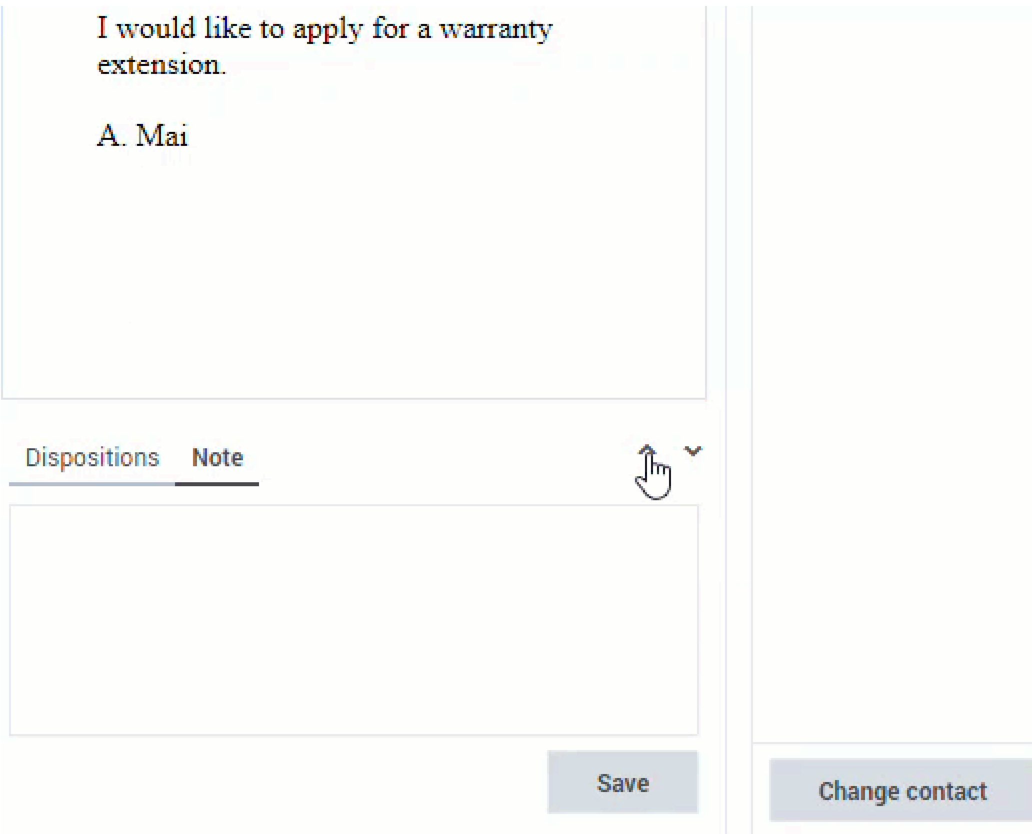
- View the associated case data.
- Add a note or disposition code.
- Mark it as done.

Watch the video to see what happens when an email arrives at a workstation.

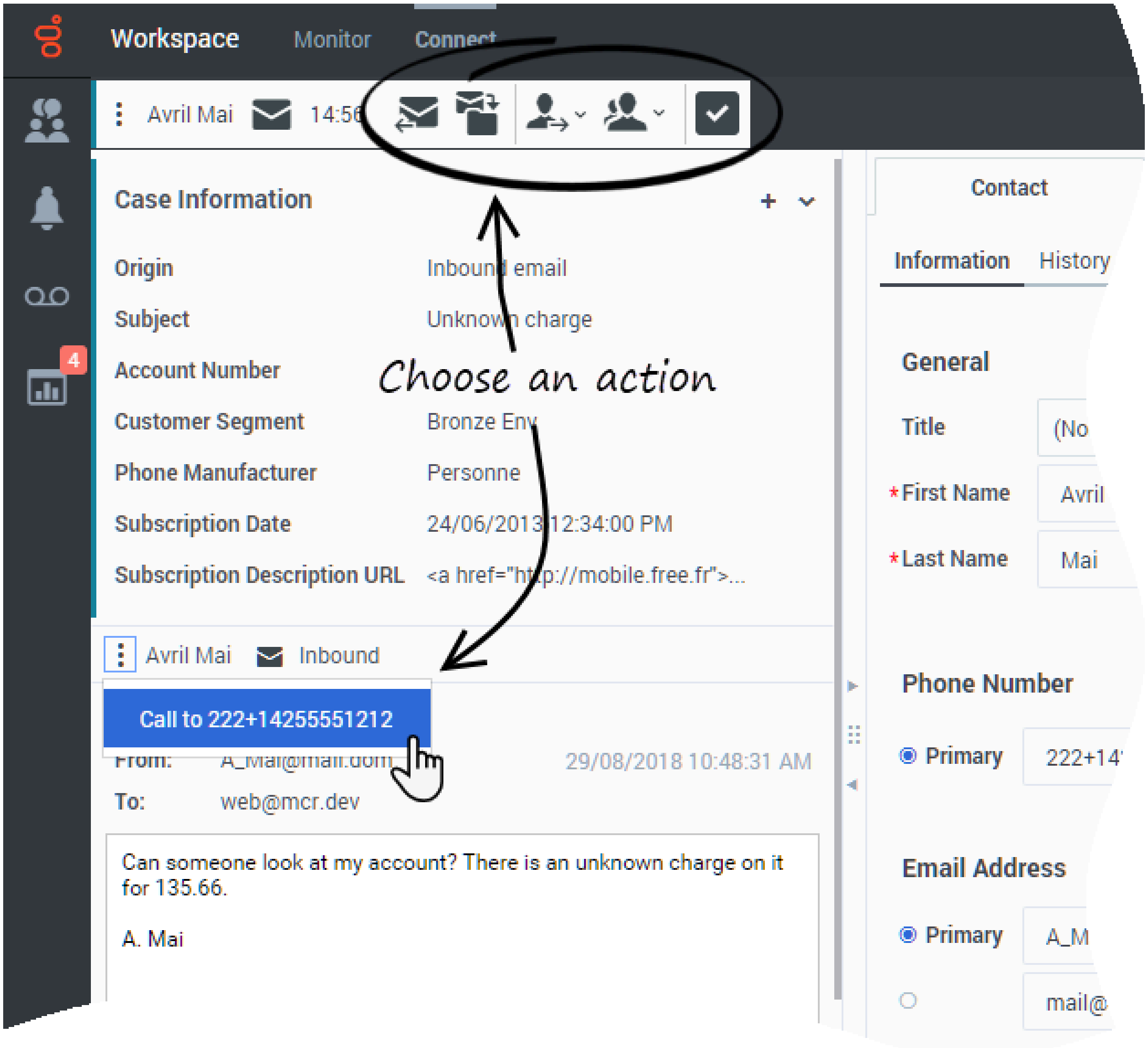
Sometimes Workspace is unable to assign a call to a contact or it assigns the call to the wrong contact. Your account might be set up to let you assign or change a contact in the **Contact** tab.

How do I expand or collapse panes to avoid scrolling?

Use the little chevrons (up/down arrows) to expand or collapse different parts of the interaction view to give yourself more room to work or to enable you to focus on just one pane.



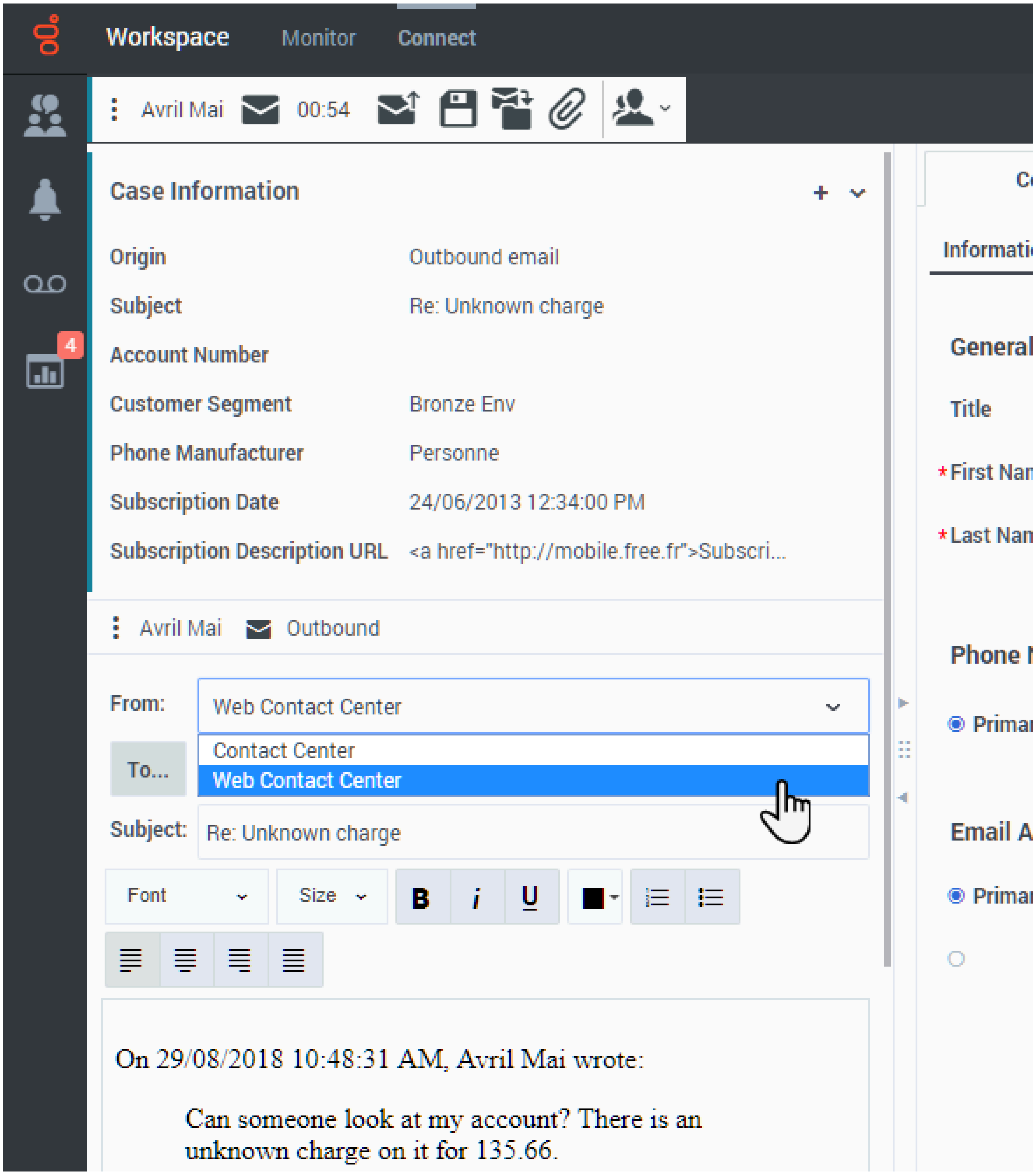
How can I get help with an email?



- Check the case data at the top of the email for information that might help you.
- Call the contact. Click the **Party Action** menu to see if their number is available.
-  to start a consultation with a team member.

If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

How do I compose and send an email?



There are four ways to compose and send an email in Workspace:

- Reply to an active interaction.
- Find a contact (using your internal team or contacts directory) and select the email option from their contact details.

- During a call, click the **Party Action** menu and select **Email**.
- During a chat, click an email address in the chat transcript.

While the outbound email window is open, you can compose a message, and as needed, add:

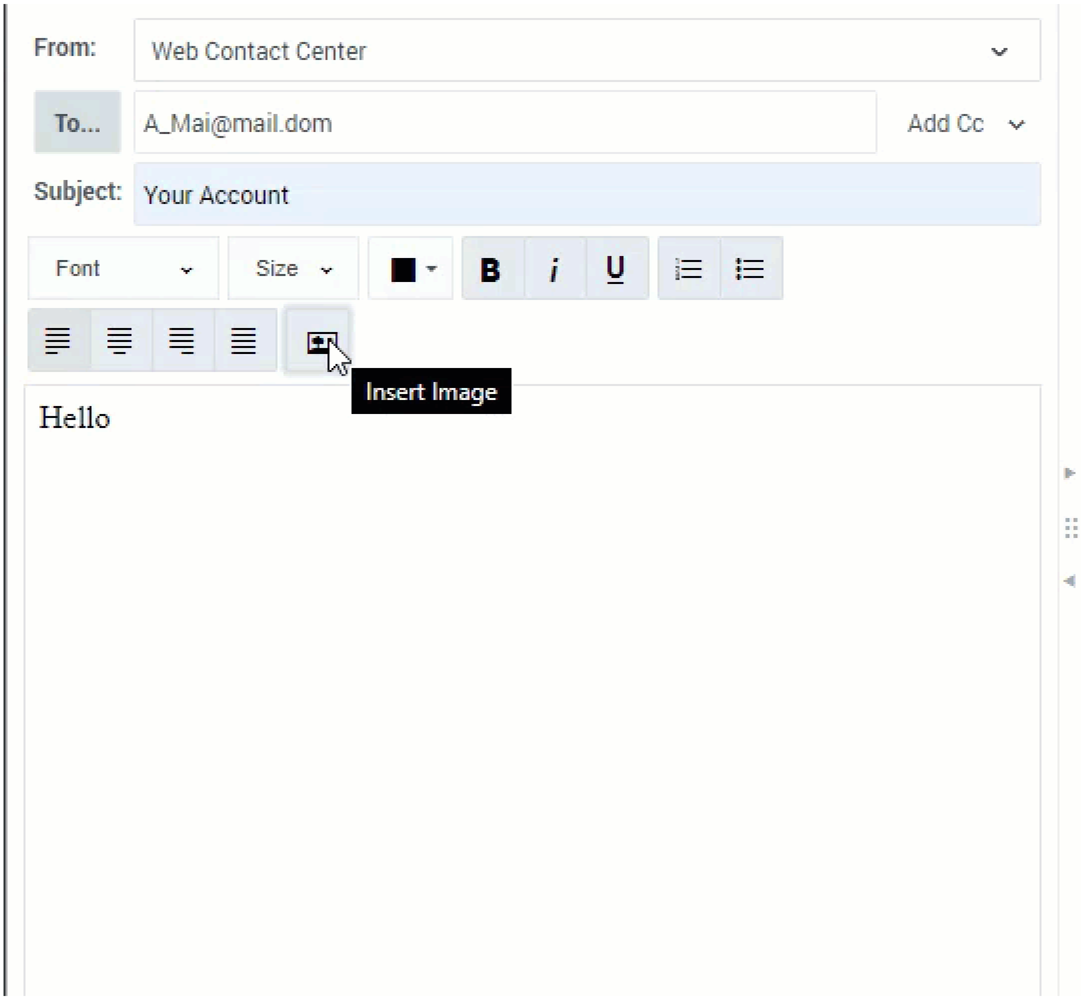
- A note
- A disposition
- attachments (your account might be restricted to attachments below a certain size, both per file and total size of all attachments and also to only certain file types)
- Recipients using To, Cc, and Bcc

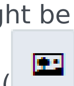
Then send the email.

Use the **From** drop-down to choose a different 'from' email address. Your administrator sets the default 'from' address and the other addresses from which you are allowed to send an email.

If you are not yet ready to send it, you can save it as a draft in your workbin, or delete it.

How do I embed an image in an email?



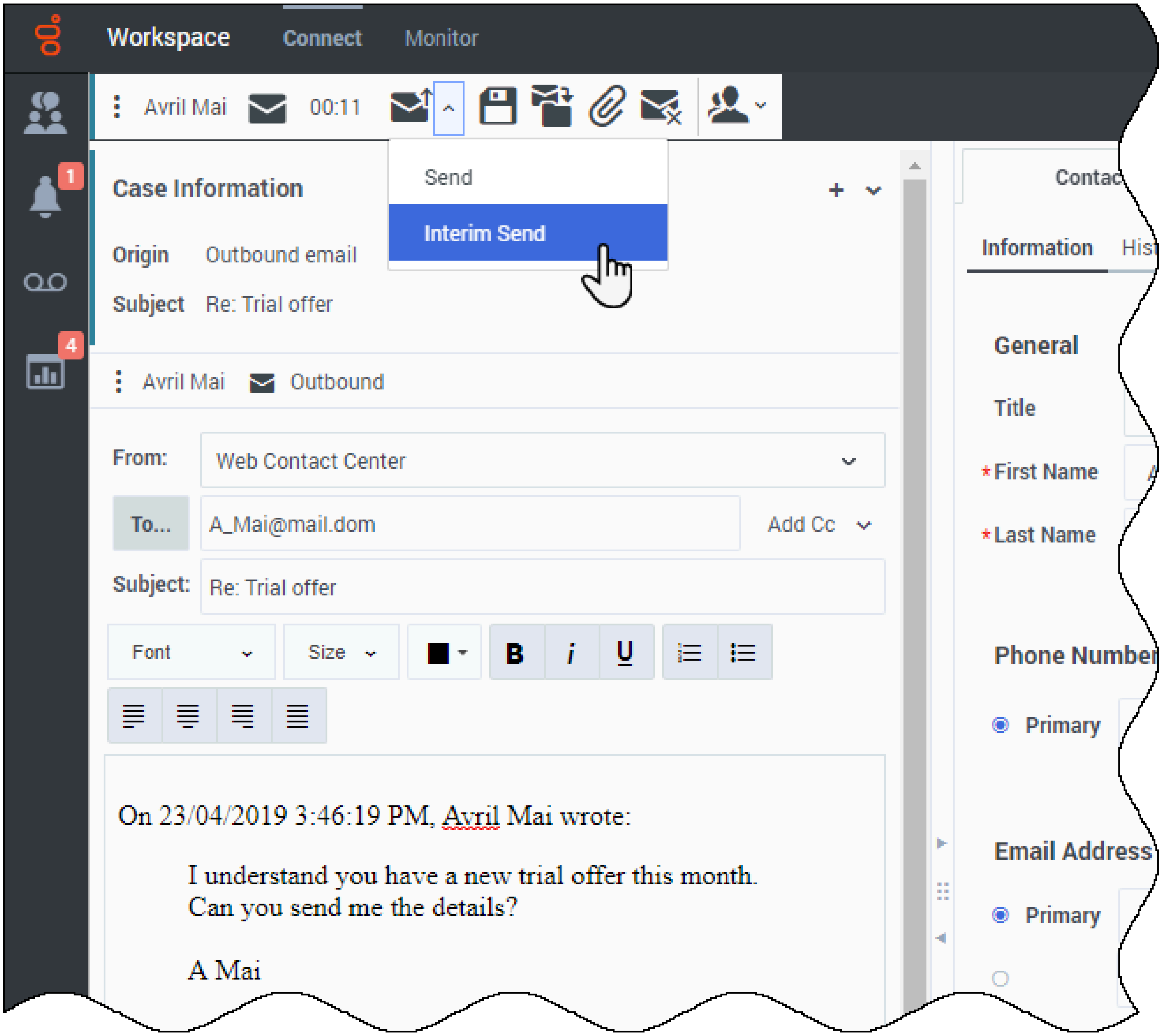
You might be allowed to insert embedded images (pictures) into email interactions by clicking **Insert Image** () or by dragging and dropping an image from a folder or other document into the body of the email interaction.

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 larger, the quality of the image will degrade.

You might also be able to insert a Standard Response that contains an image.

You can delete an embedded image by pressing the **delete** or **backspace** keys.

How do I reply multiple times to the same email?



Link to video

Sometimes you are required to reply to an inbound email more than once. For example, you might send an immediate reply acknowledging that you have received the email and will start working on it. Later, when you have the information your contact is requesting, you must reply a second time to the inbound email. If you just reply to the inbound email and then click **Send**, the inbound email closes and is marked as Done. To keep the inbound email active use the Interim Send feature.

Interim Send sends your response, closes the outbound Email Interaction view and reopens the inbound email interaction in the same view. You can create a second reply email message, you can transfer the email, or you can consult about the email with another party. If you close the inbound Email Interaction view, you can re-open it from your In-Progress workbin.

To access the Interim Send feature, click the down arrow next to the **Send** button , then select **Interim Send** from the drop-down menu. The inbound email is retrieved from your In-Progress workbin and reopens on your desktop. It is not marked as Done.

Forwarding an email inline to an external resource

Link to video

To send a commented copy of an email interaction to an external resource (someone in your company directory that is outside of the control of the Genesys environment — for example, your back office). This is called inline forwarding. A forwarded inbound email is copied into a new email interaction. The new email has a note with the date and contact name or the header of the email that you are forwarding and below that, the contents of the original email quoted. You are still responsible for responding to the original inbound email interaction. You might or might not be required to wait for an answer to this forward, depending upon your corporate policies and processes.

To forward the email, click **Forward** () on the active inbound email window toolbar. Usually this feature is available only for current email interactions; however, some contact centers might give you the ability to forward email interactions from the Interaction History that have already been closed.

To add a target to the **To** address field, do one of two things:

- Type an email address in the address field. Click **Add Email Address** to enter the email address of the target in the address field. If your environment is set up to let you add multiple addresses, you can click in the address field and enter additional email addresses.
- Click the **To...** button beside the **To** address field to display the Contact Search view. You can use this view to perform a search of the Contact Directory for targets. The Contact Search view can also be used to add **Cc** targets (if Cc is available in your environment).

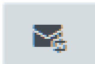
To display the **Cc** address field, click **Add Cc**. The **Cc** address field is displayed below the **To** address field. You add target email addresses to the **Cc** field in the same way that you add addresses to the **To** address field. Click **X** to remove the **Cc** address field.

To add a comment, information, or instructions to the forwarded email interaction for the target, enter your message above the original email that you are forwarding.

To send the forwarded inbound email to the targets, click () **Complete Forward**.

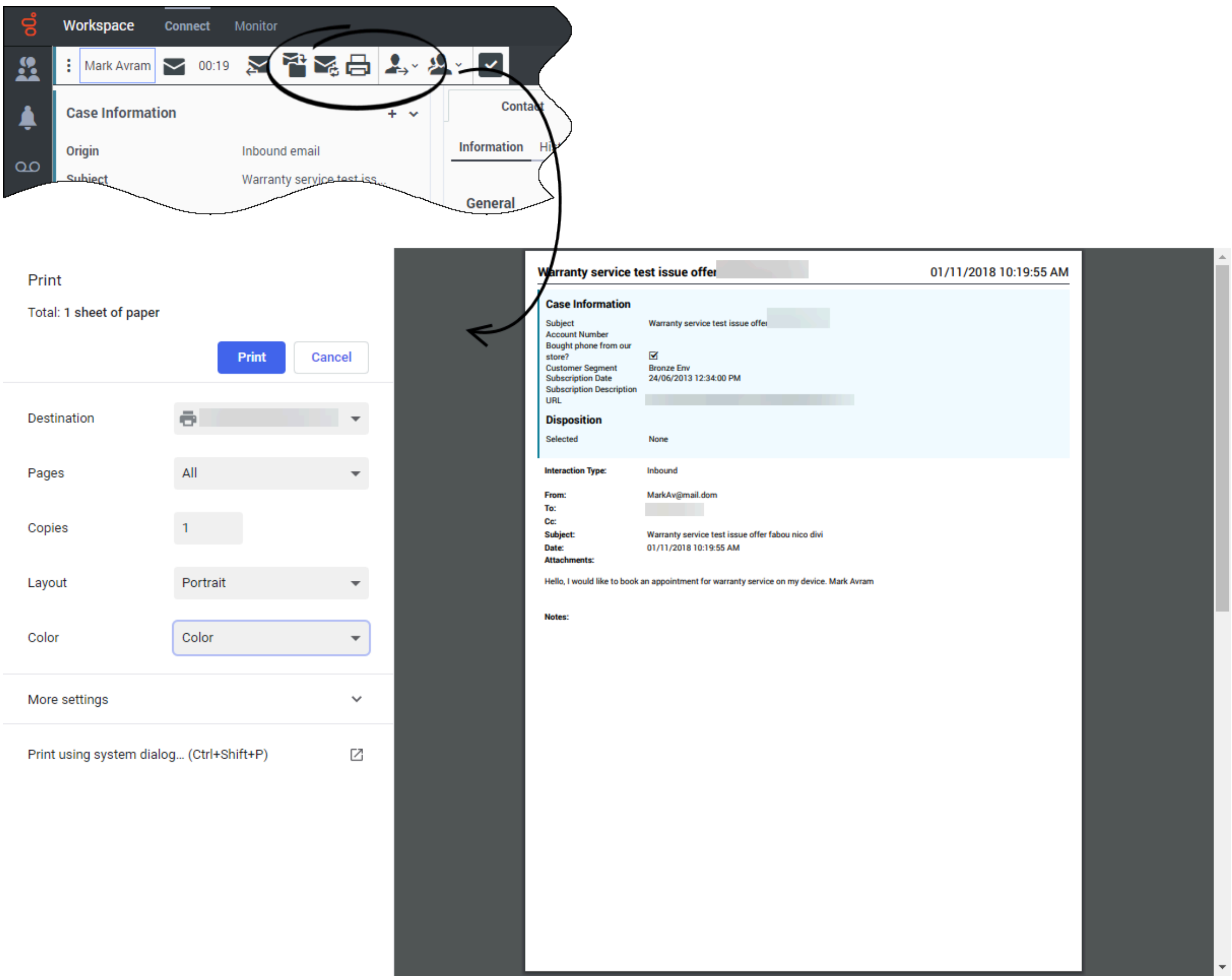
When you forward an email, it is temporarily stored in your In-Progress workbin until the forward is completed, then it is removed from the workbin.

Forwarding from History

You can inline forward from the Interaction History. In the following windows, select an interaction and click :

- **Interaction History**
- **Contact History**
- **My History**

How do I print an email?

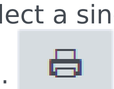


If your account is set up for printing, you can print an email from any of the following views:

- My History

- My Workbin
- Contact History in the Contact Directory
- Interaction Search
- Email Interaction view

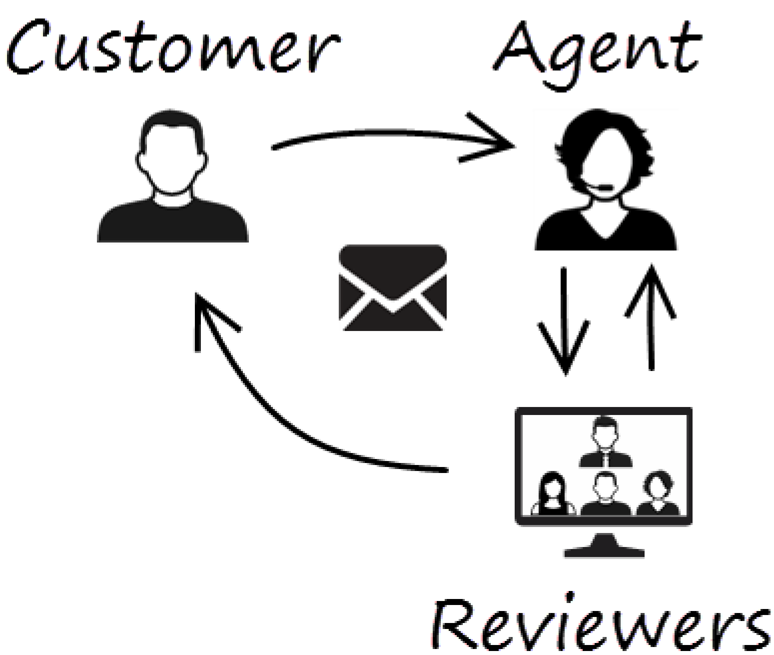
If you are allowed to print from the Email Interaction view, the print button is available in the toolbar: 

If you are allowed to print from the history and interactions views, the print button becomes active when you select a single email interaction (printing multiple email interactions at the same time is not possible): 

Your administrator decides which parts of an email you are allowed to print. One or more parts might be enabled for you: From, To, Cc, Subject, Body, Date, Attachment, Case Data, Note, and/or Disposition.

Clicking the **Print** button opens your browser Print window. The email is displayed in the preview area. Use your browser print controls to select a printer and format your print job.

How does email quality assurance work?



Link to video

Workspace lets you and your team lead or supervisor work together to perform a Quality Assurance (QA) review of outbound emails. If your contact center is set up for email QA, any emails that you send are first sent to a reviewer for approval.

Here's an example of how a typical email QA review cycle might work:

- A customer sends an email to an agent.
- The agent sends a reply, which is directed to a reviewer.
- The reviewer either approves the email (sends it to the customer) or rejects it (holds it back for changes). The reviewer might make the updates themselves, or send it back to the agent with notes or instructions. The Case Information for the interaction might also show a **Rejected** status.
- After the changes are made, the review process repeats.

(Ask your administrator about the QA review process in your contact center as it might differ from the one described here.)

What next?

- Contacts
- Team Communicator
- Internal interactions

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

Chat

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Chat.

Chat is a Genesys Digital channel. The chat channel lets you handle customer chats. To chat with your team members start a chat consultation.

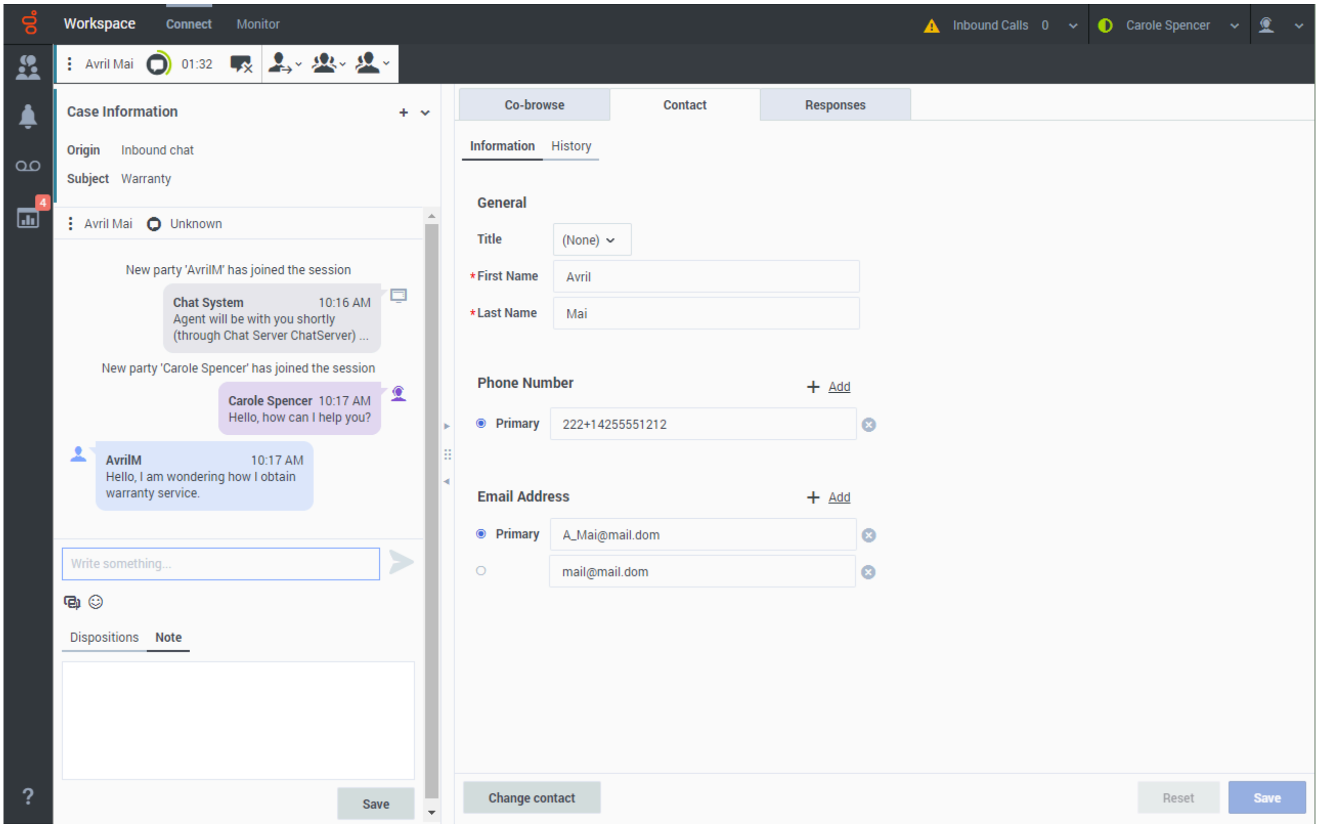
This article describes the typical options for handling a chat interaction. During a chat session, you and your contact send messages back and forth in real-time. When your contact is typing, you will see a notice that they are writing a response, but you won't see what they have written until they send it. The Interaction View keeps track of the conversation and allows you to review what has been said. Chat interactions include Web Chat, Facebook Messenger, Twitter Direct Messages, WhatsApp messages, and SMS.

In some environments, Workspace Agent Desktop supports the Conversation tab and the Communication tab. These tabs let you continue conversations with contacts after the initial interaction is ended. In most cases, chat interactions are directed to your desktop, you exchange messages, and when either you or the contact ends the chat session, the interaction is ended and must be closed and marked as **Done**. However, sometimes you need to continue a chat conversation. Perhaps you had to take time to find additional information for the contact or initiate a business process in your company before continuing the conversation.

Important

- Due to continual changes to Agent Desktop, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you see in the product when you use it.
- Some Workspace Agent Desktop features are available only for Genesys Engage cloud users.
- Some Workspace Agent Desktop features are available only for Genesys Engage on-premises users.

How do I handle a chat interaction?



Link to video

When you accept a chat request, the name of the contact is displayed at the top of the screen and the timer for the pending response indicator starts. The color of the indicator begins as green, then changes to yellow if you have not responded within the specified time limit. If you still do not respond, the indicator changes to red and begins to flash.

Some of the things you can do while handling a chat include:

- Transfer () the chat to someone else in your company.
- Start a chat conference () with yourself, the customer, and someone else in your company.
- Start a Voice (internal targets and contacts) or Chat (an internal target only) consultation. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.
- Call or email the contact, if there is a phone number or email address in the contact database. (You can also launch a call or email from the **Party Action** menu by clicking an email address or phone number.) If your account is set up for it, you can also click a phone number or email address that your contact sends you as a chat message to call or email the contact.
- Add a disposition code or note.

- End the chat () and mark it as done ().
- Sometimes Workspace is unable to assign a call to a contact or it assigns the call to the wrong contact. Your account might be set up to let you assign or change a contact in the **Contact** tab.

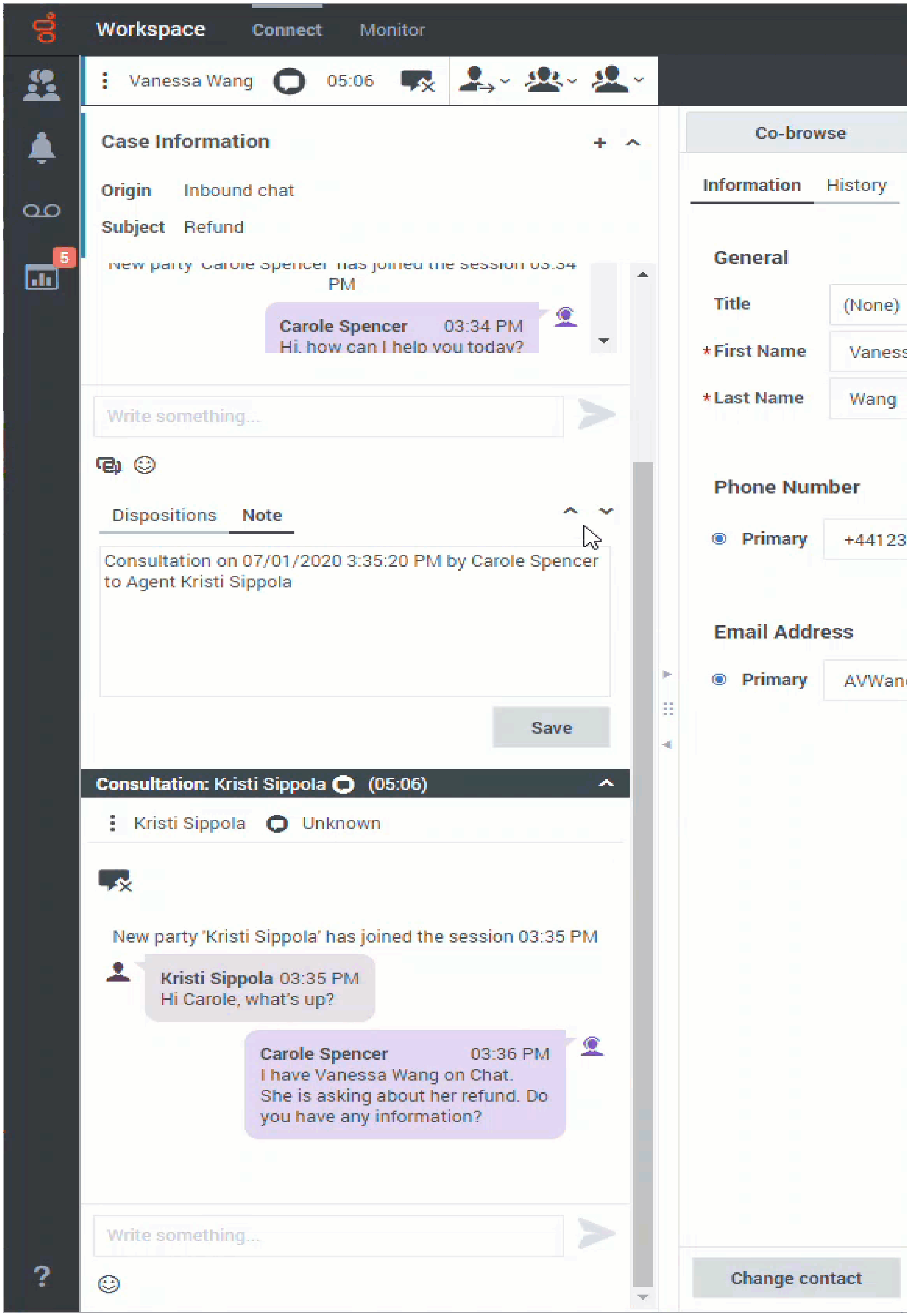
If you place your mouse pointer over the interaction in the Interaction Bar, you can see the elapsed time of the interaction and the last lines of the chat transcript. Connection-status information is displayed next to the **Party Action** menu.

Note: If you have a pending response and the Chat Interaction window is not the active window, it will start flashing in the Windows taskbar, regardless of the pending-response indicator status (green, yellow, or red).

Watch the video to see what happens when a chat request arrives at a workstation.

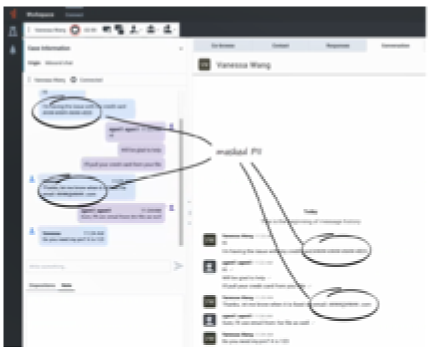
How do I expand or collapse panes to avoid scrolling?

Use the little chevrons (up/down arrows) to expand or collapse different parts of the interaction view to give yourself more room to work or to enable you to focus on just one pane.

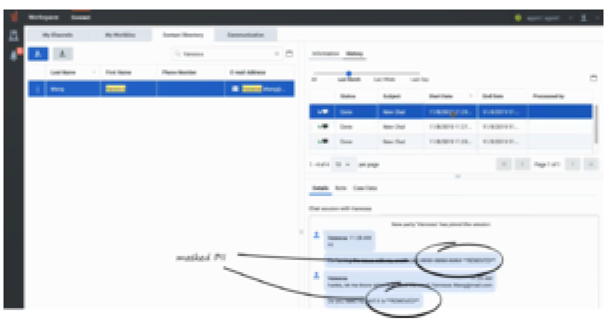

Workspace
Connect
Monitor
Vanessa Wang
05:06
Case Information
Origin Inbound chat
Subject Refund
PM
Carole Spencer 03:34 PM
Write something...
Dispositions
Note
Consultation on 07/01/2020 3:35:20 PM by Carole Spencer to Agent Kristi Sippola
Save
Consultation: Kristi Sippola (05:06)
Kristi Sippola
Unknown
New party 'Kristi Sippola' has joined the session 03:35 PM
Kristi Sippola 03:35 PM
Hi Carole, what's up?
Carole Spencer 03:36 PM
I have Vanessa Wang on Chat. She is asking about her refund. Do you have any information?
Write something...
Co-browse
Information
History
General
Title
(None)
*First Name
*Last Name
Wang
Phone Number
Primary
Email Address
Primary
Change contact
5
?

Why are some numbers masked out?

Occasionally, a contact will enter their credit card number, personal email address, or other Personally Identifiable Information (PII) into the chat. This is a potential security risk for the contact. In some environments, Workspace Agent Desktop detects and masks PII to keep contact information private. This figure shows you some of the ways that PII is masked in the chat transcript, **Conversation** tab, **Communication** tab, and in the History.



Click to enlarge



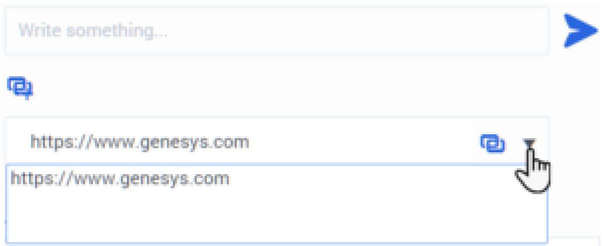
Click to enlarge

Pushing weblinks (URLs) to your contacts

Link to video

Some agents might be set up to push website links (URLs) to contacts. If you are, you will see the **Add URL** button ( ) beneath the chat text editing area.

Click the button to open the URL Editor below the chat text editing area. Type or paste the website address (URL) that you want to send to your contact and click **Send** ( ).

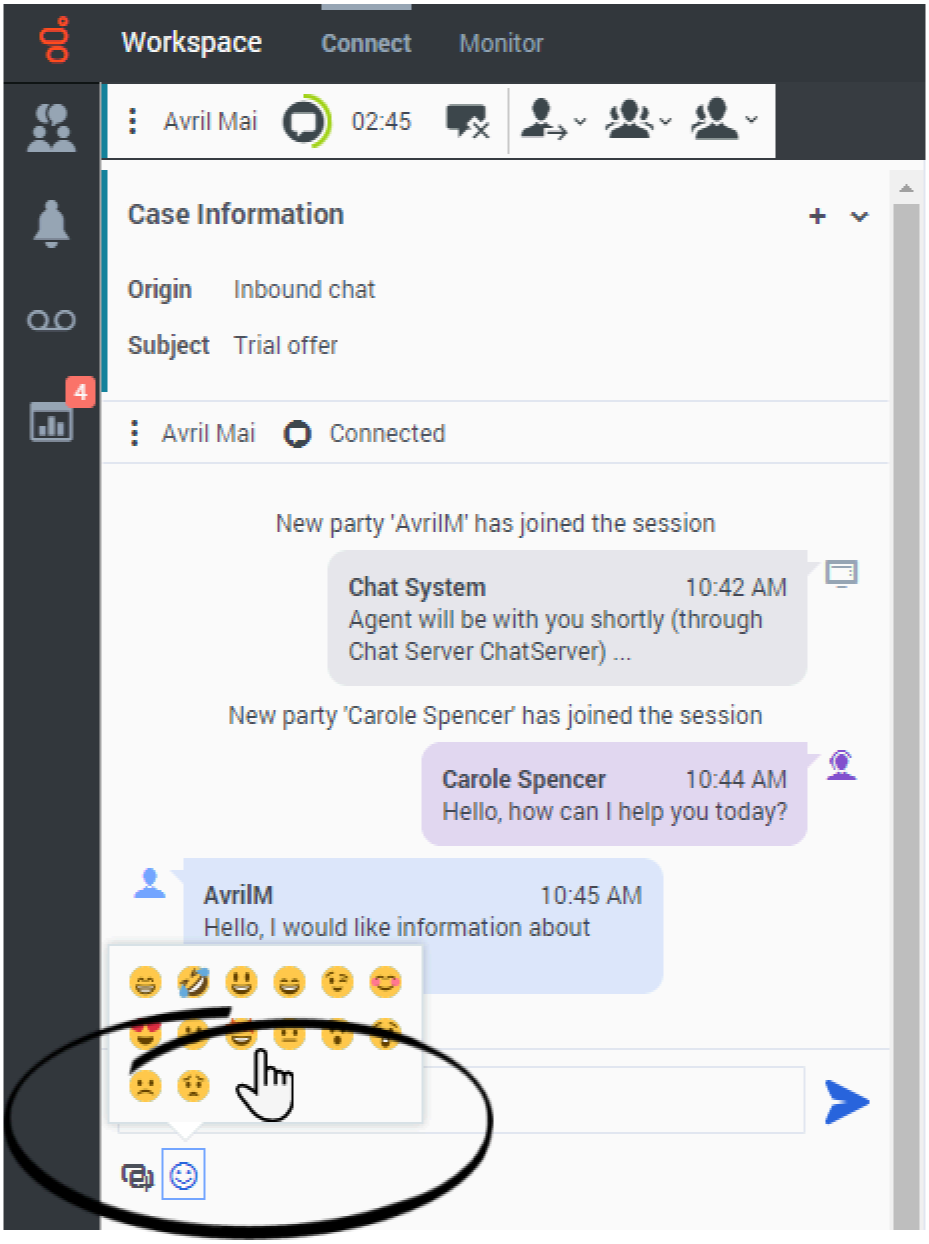


To check the URL before you sent it, click the link symbol () to open the URL in your browser. This way you can be sure that you are sending your contact to the correct website.

If you have sent previous URLs, a down arrow is displayed next to the link symbol in the URL Editor area. Click the arrow to open a menu that contains a list of URLs that you have sent to your contacts. Select one of the URLs to push it to your contact. You can use arrow keys to navigate through the list of URLs: up and down highlights the next URL, left or right selects it and inserts it into the Push URL field.

Your contact will receive a message in their chat window telling them to click the link that you sent them.

Send Emojis to Contacts



Your account might be set up to let you send emojis (*emoticons* or *smileys*) to your contact as part of the chat interaction text. 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.

Important

The **Communication** tab uses a different emoji picker from the Chat interaction view.

There are different ways to add emojis to your chats. Some contact centers allow you to copy and paste emojis into the text editing area. Other contact centers might have the **Emoji Picker** enabled (see below) — use this tool to choose an emoji to send.

Your administrator might have enabled the licensed emojis that come with Workspace Agent Desktop. These are pictures that enhance the appearance of standard operating system and browser supported emojis. If this feature is not enabled for you, you will see the standard color or black and white emojis that are supported by your operating system and browser instead.

Use the **Emoji Picker** to add an emoji to your chat interaction:

1. Click the **Choose an emoji** button (☺) that appears below the text editing area to display the menu of emojis that you can choose from.
2. Click an emoji.
3. Click **Send** ().

Continuing the conversation

Link to video

Important

Some Workspace Agent Desktop features are available only for Genesys Engage cloud users. Not all users will see the **Conversation** and **Communication** tabs.

If your account is enabled for asynchronous chat, you can continue a chat interaction after the initial interaction is ended by using the Conversation tab in the interaction window or the Communication tab.

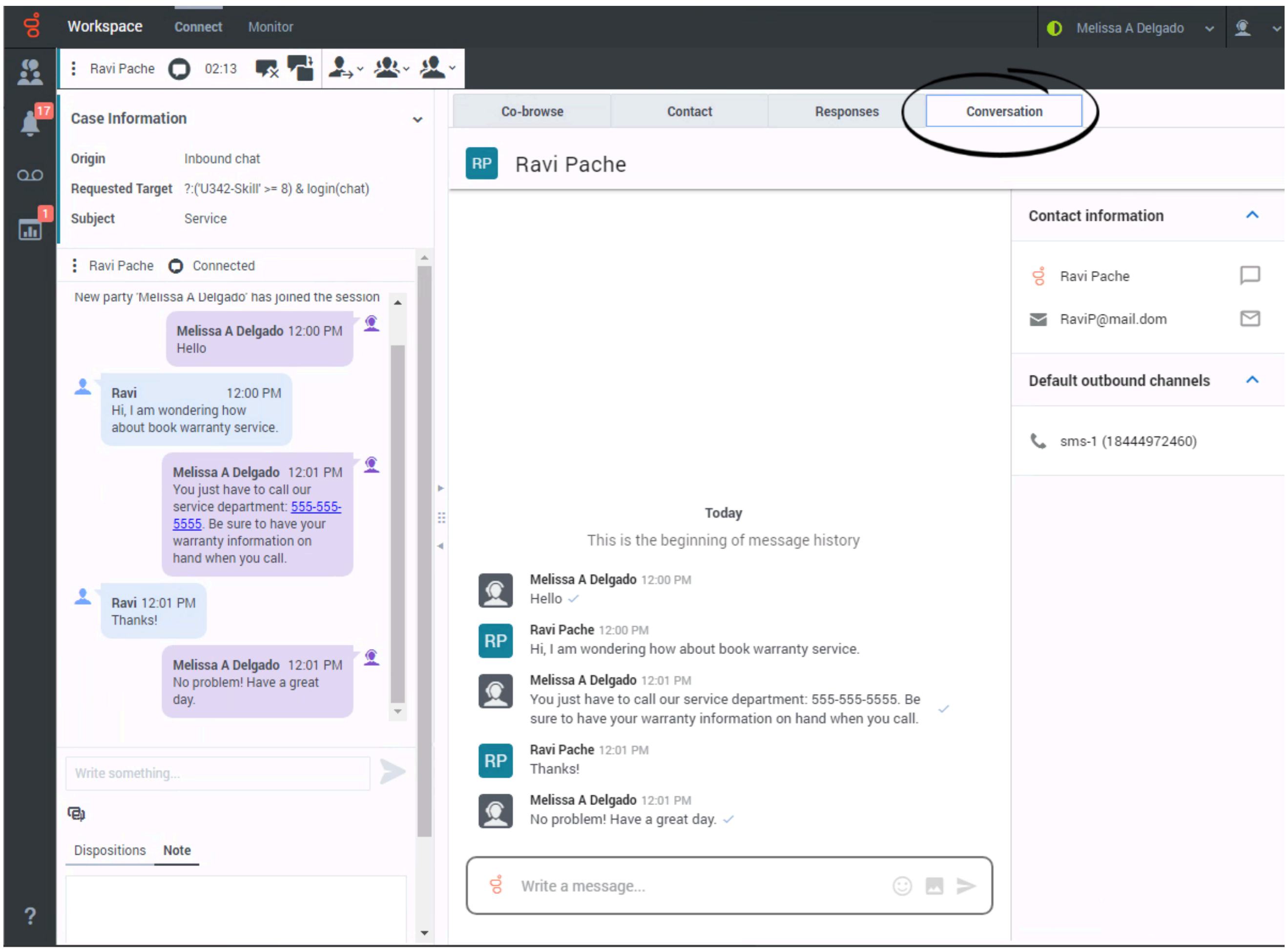
Conversation tab

If you have not yet marked a closed interaction as **Done**, in the **Conversation** tab, the transcript of your current interaction as well as all previous chat interactions with the contact is displayed. You can scroll through it to find messages. To reactivate the Chat session, type your message in the **Write a message** field and click **Send** ().

Communication tab

To reactivate an interaction that is already closed and marked as **Done**, select the **Connect** group, select the **Communication** tab, then click a contact name in the **Assigned contacts** panel. All previous Chat interactions that your contact center has had with the contact are displayed in the transcript area on the right. To reactivate the chat session, click the **Chat** button in the **Contact info** column to open the Chat interaction view or start typing a new message in the **Write a message** field and click **Send** ( ).

Conversation tab



If Asynchronous Chat is enabled for your account, the **Conversation** tab is displayed in the right panel of the Chat Interaction view.

To receive chat interactions, set your status on the Chat channel to **Ready**.

Click **Accept** when a chat notification is displayed on your desktop. This opens the Chat Interaction view. Handle the Chat interaction as normal. The transcript of the chat is displayed both in the Transcript area and the **Conversation** tab. The **Conversation** tab also contains the transcripts of all *previous* chat interactions that your contact center has had with the contact.

The **Conversation** tab allows the following actions:

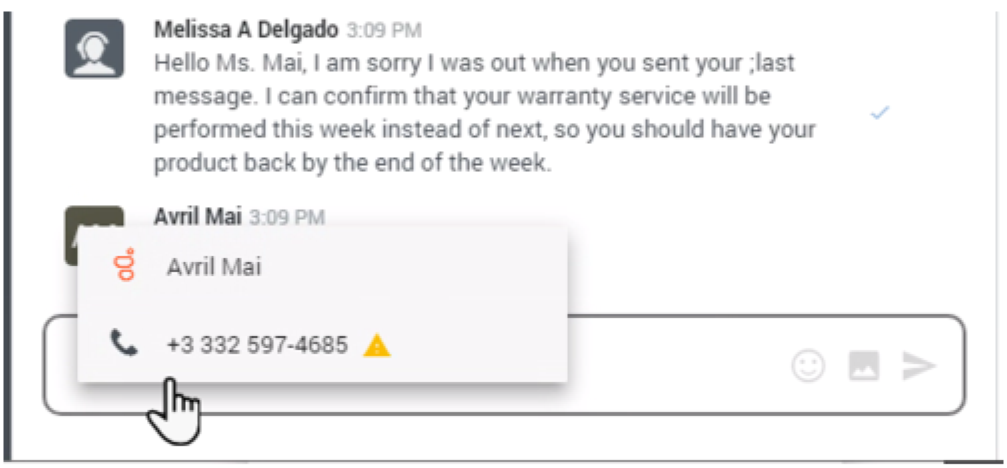
- : Click to send messages you type in the Message Composition area.
- : Attach an image.
- : Send an emoji to your contact.

Tip

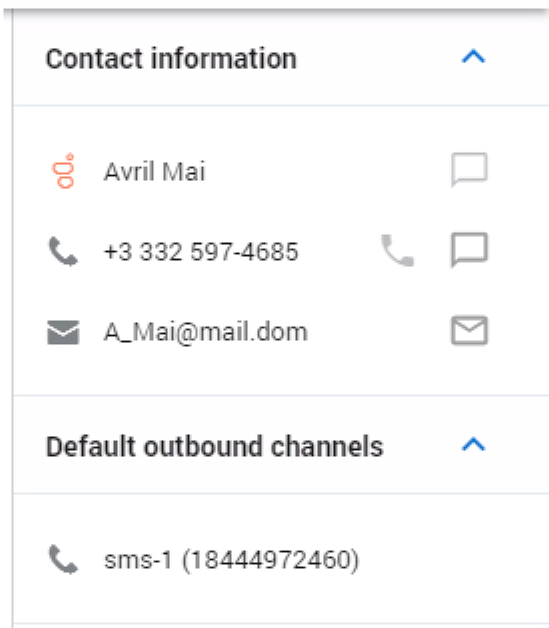
If you or the contact end the session, you can keep the Chat interaction view open while you perform other actions or business processes. Check with your supervisor about whether to mark the interaction as **Done** or keep the interaction view open while you perform other duties.

Keeping the interaction view active might affect your **Ready** status.

To choose a different channel to send your message, click the channel icon in the message composition field and select the channel you want to use. The Genesys Chat channel is selected by default in the message composition field unless the contact has sessions in Facebook, Twitter, or WhatsApp; these are selected first in that priority order.



To launch an interaction, such as a chat, a WhatsApp, or an SMS, click the interaction type in the **Contact info** column. This launches the Chat Interaction window and enables you to continue the conversation there with access to all the interaction window features such as Contact Information, Contact History, and Standard Responses. **Note:** Genesys recommends that you switch to a chat interaction window whenever you want your chatting time to be recorded for KPI purposes.

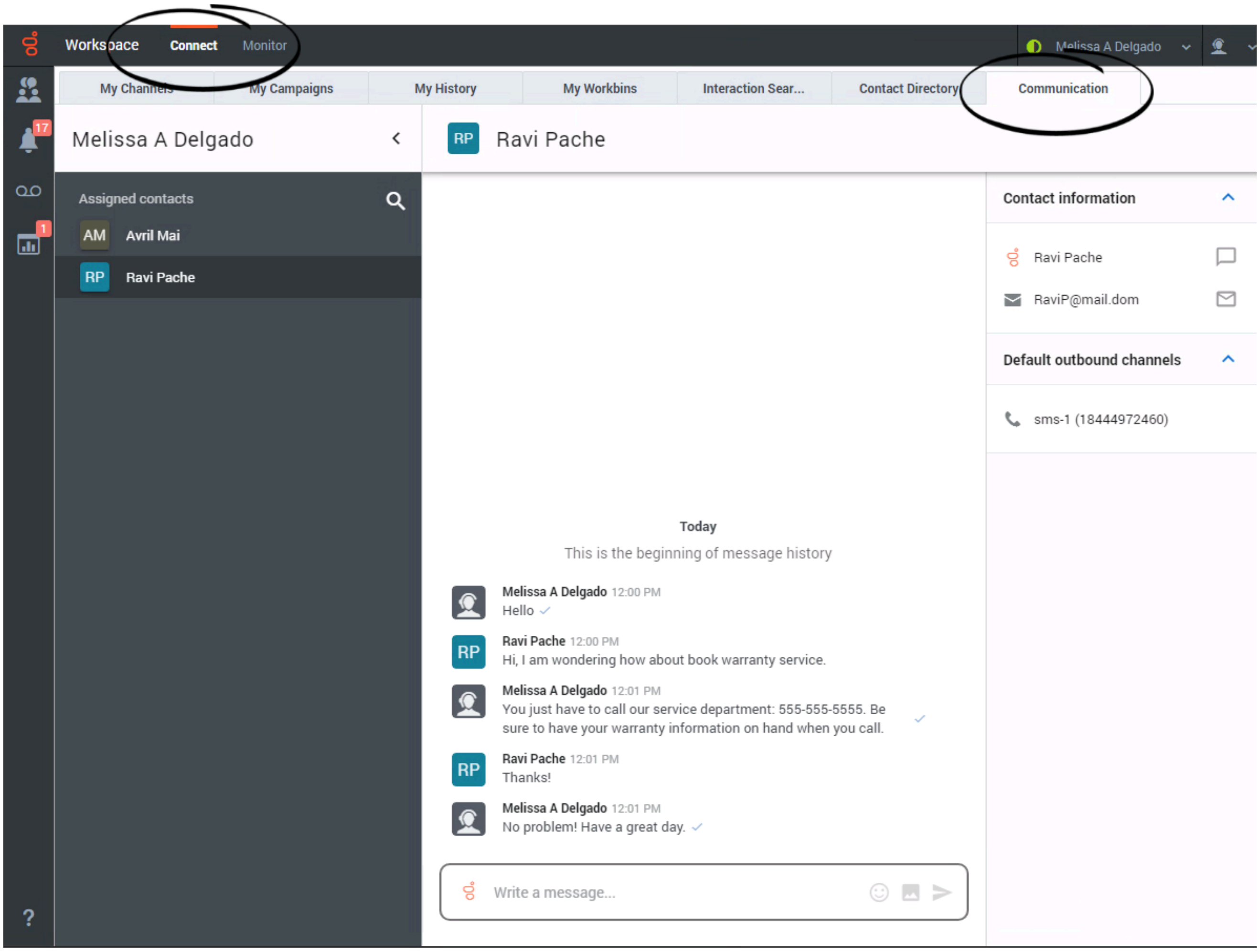


In the **Contact info** column, chat channels are displayed in the following priority order:

- Facebook
- Twitter
- WhatsApp
- Genesys Chat
- SMS

If a channel is not displayed, there are no ongoing conversations with the contact on that channel.

Communication tab



Link to video

The **Communication** tab in the **Connect** group lets you continue chat conversations that you or others at your contact center have had with your company's contacts.

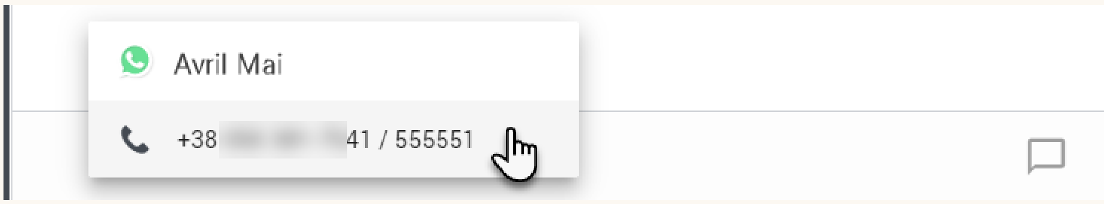
After an agent or the contact leaves a chat session, you can continue the conversation by finding the contact in the **Communication** tab and selecting their name from the contact list.

The **Communication** tab has two areas, the **Contacts** list and the conversation transcript area.

- Select a contact in the **Contacts** list to see the conversations that contact has had with with your company. If a contact is currently active on a channel, a white dot is displayed next to their name.
    - Choose **Private** to see Web Chat, Facebook Messenger, and Twitter Direct Messages transcripts.
    - Choose **Public** to see public Facebook messages and Twitter Tweets that involve your company.
- The conversation transcript area displays all the chat interactions that the selected contact has had with your company.

Communicating with a contact

> **Important**
>
> In some environments, the **Write a Message** field is not available. To launch a new interaction with the contact click the **Chat** icon and select a channel icon, such as Chat, Email, SMS, or WhatsApp.



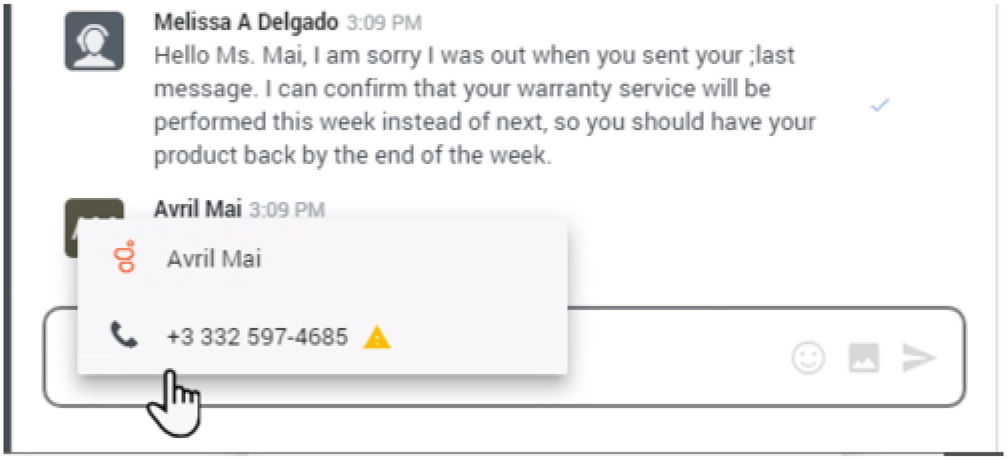
To continue the conversation, either type in the **Write a Message** field and click **Send** () or click the **Chat** icon to open a new Chat interaction view.

If you are unsure whether the contact still has the browser open where they initiated the previous chat, use the **Write a Message** field in the **Communication** tab. The next time that the contact logs in to your company's website the chat will continue and the contact will see all the new and previous messages.

The conversation area allows the following actions:

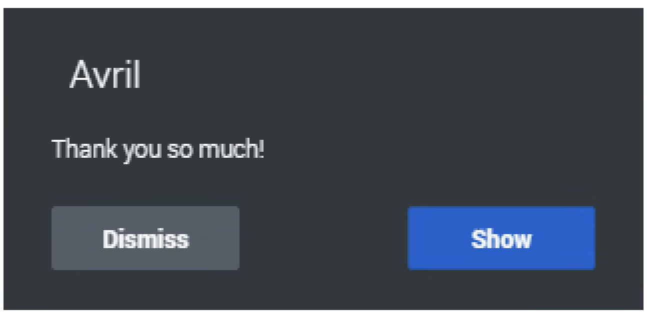
- : Click to send messages you type in the Message Composition area.
- : Attach an image.
- : Send an emoji to your contact.
- : Toggle the display of the **Contacts** list area.

To choose a different channel to send your message, click the channel icon in the message composition field and select the channel you want to use. The Genesys Chat channel is selected by default in the message composition field unless the contact has sessions in Facebook, Twitter, or WhatsApp; these are selected first in that priority order.



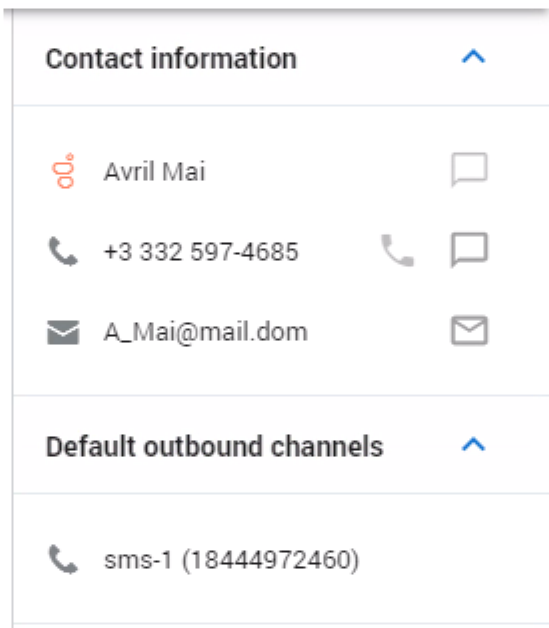
New message notification

When the contact responds, you receive a notification on your desktop. Click **Show** to open the **Communication** tab of the **Connect** group. Click the **Chat** icon to open the chat in a new Chat interaction view if you need to respond and continue the conversation.



Starting a new interaction

To launch an interaction, such as a chat, a WhatsApp, or an SMS, click the interaction type in the **Contact info** column. This launches the Chat Interaction window and enables you to continue the conversation there with access to all the interaction window features such as Contact Information, Contact History, and Standard Responses. **Note:** Genesys recommends that you switch to a chat interaction window whenever you want your chatting time to be recorded for KPI purposes.



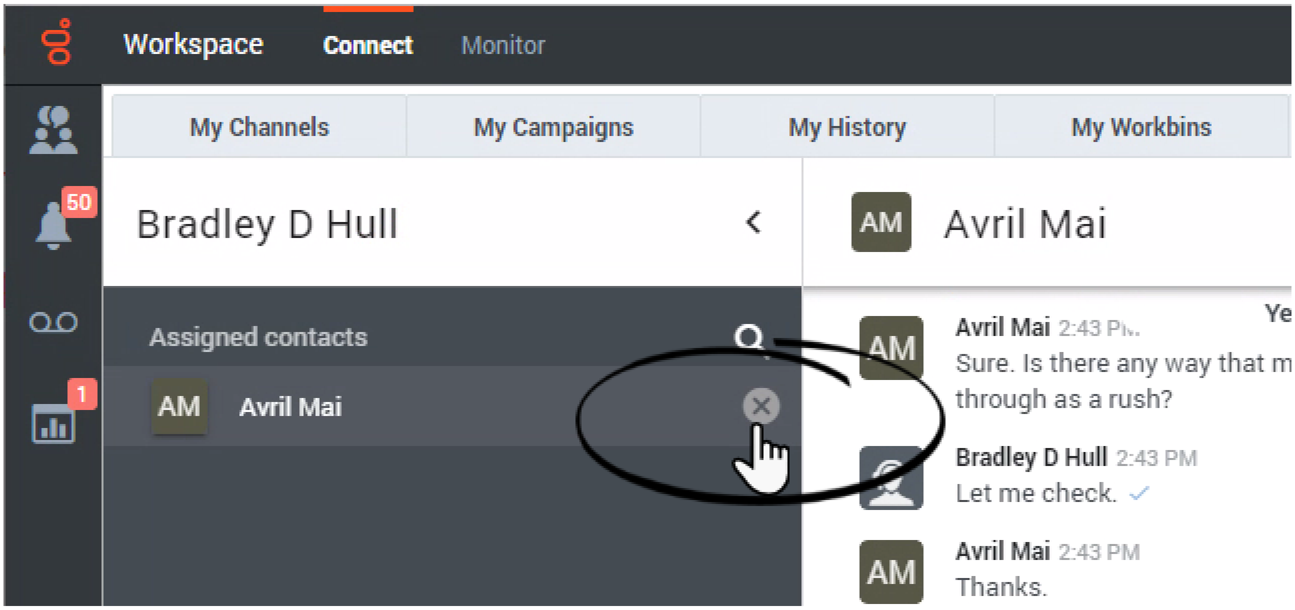
In the **Contact info** column, chat channels are displayed in the following priority order:

- Facebook
- Twitter
- WhatsApp
- Genesys Chat
- SMS

If a channel is not displayed, there are no ongoing conversations with the contact on that channel.

Stop following a conversation

If you no longer wish to follow a conversation you can remove conversations from the **Assigned contacts** list. Find the conversation you want to remove, then hover your mouse pointer over the contact name. Click the **X** next to the contact name to remove the conversation from your **Communication** tab.



Creating a contact and sending a message

You can use the **Communication** tab to search for a contact by entering a phone number in the search field above your assigned contacts.

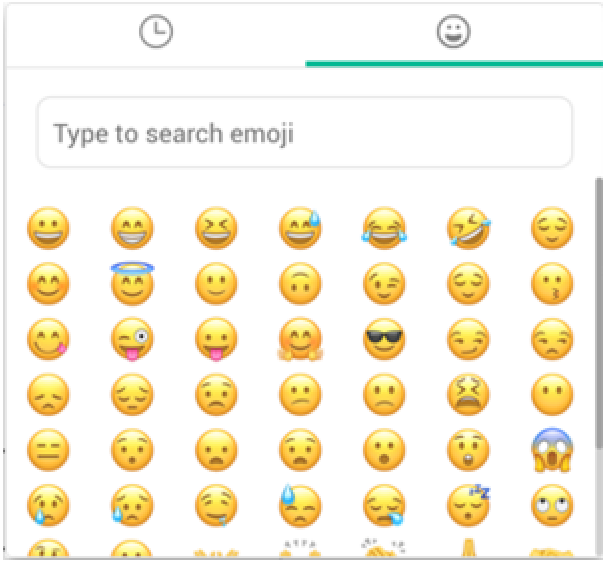
If the contact is found in your company's contact database, they are added to your assigned contacts list and the contact record is displayed in the **Communication** tab. You can select any of the available channels to send a new message.

However, if the contact is *not* found in your company's contact database, the **No contact found** view is displayed. You can use this view to add contact information, including first and last name, phone number, and email address, then create the contact in the contact database and send a new message to the contact.

300px

Using the Communication Tab Emoji Picker

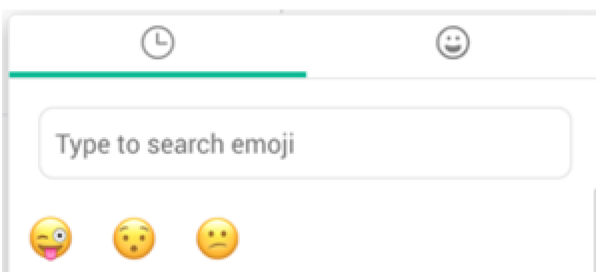
The emoji picker lets you select an emoji to insert into your message from either the Chat interaction (including social media and other messaging channels such as SMS and WhatsApp), the **Conversation** tab, or the **Communication** tab. To open the emoji picker, click the Emoji button ☺. To insert an emoji into the message composition field, click it.



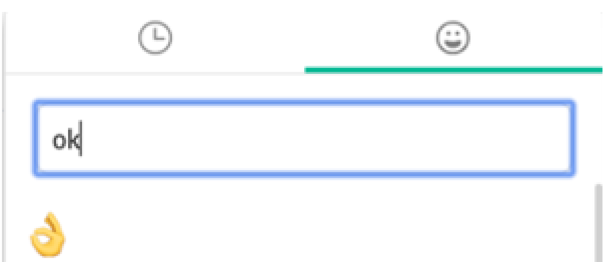
There are two views in the emoji picker, **Recent** and **All**:

- : Click to see your recently used emojis.
- : Click to see all of the available emojis.

The **Recent** view lets you pick from among the last emojis that you have sent during the current session. This is handy if you have favorite emojis that you like to use over and over.



You can search for emojis by name using the search field. Type in the name of an emoji or sentiment.



What next?

- Contacts
- Team Communicator
- Altocloud customer journey
- Internal interactions

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

Facebook Chat

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Facebook Chat.

The Workspace Agent Desktop Chat channel enables you to exchange Facebook Messenger and Facebook Public messages with your contacts using the asynchronous chat features including the Conversation tab and the Communication tab. Your account must be enabled for Facebook to handle chat interactions from Facebook.

Important

- Some Workspace Agent Desktop features are available only for Genesys Engage cloud users. For example, not all users will see the **Conversation** and **Communication** tabs.
- Some Workspace Agent Desktop features are available only for Genesys Engage on-premises users.
- Due to continual changes to Agent Desktop, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you see in the product when you use it.

To receive Facebook Messenger and Facebook Public chat interactions, set your status on the Chat channel to **Ready**.

Social Engagement with Facebook

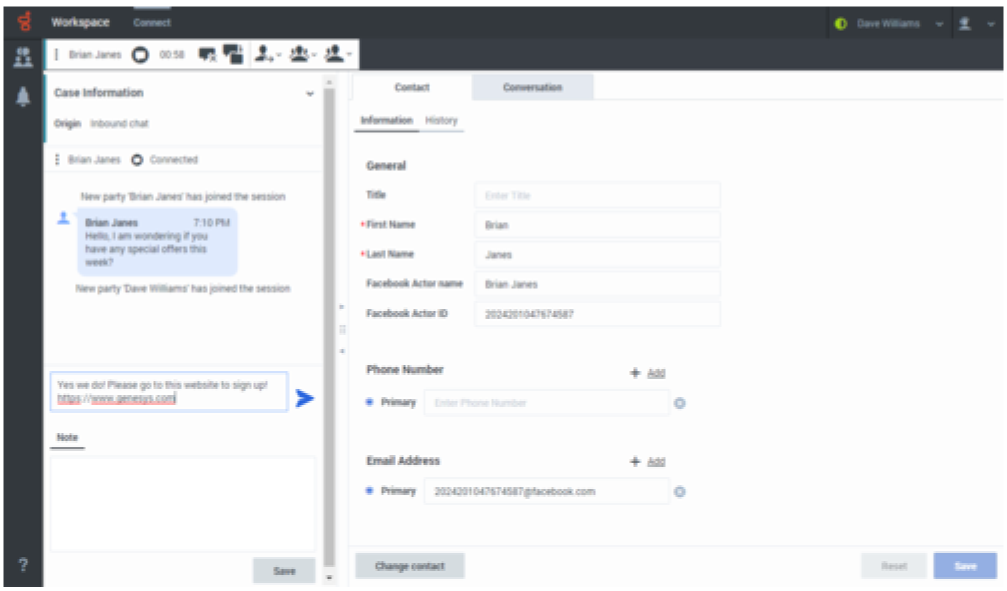
Using Genesys Social Engagement on Facebook you can monitor your business presence and identify and respond to online comments. Facebook Messenger direct messages and comments and replies on your company's Facebook page are monitored and then automatically routed to agents across your enterprise who are using Workspace Agent Desktop. Routing ensures that the right persons handles the customer message, whether it is an inquiry about a new business opportunity or a negative comment that you want to react to immediately.

Handling contacts using Workspace Agent Desktop's Facebook channel improves Customer Experience by providing consistent CX across all channels. Genesys Social Engagement identifies the contact and matches them against customers already in the contact database. When a Facebook message, comment, or reply is directed to you, you have access to all previous interactions with the contact.

Facebook Messenger

When a contact clicks **Send Message** on your company's Facebook page they can use Facebook Messenger to send a message to your company. Instead of having to use Facebook Messenger yourself to reply, the message is directed to you as a new Chat interaction. You handle it just like you would any other direct chat message with one of your contacts.

You handle a Facebook Messenger chat interaction the same way you would handle an asynchronous Chat.



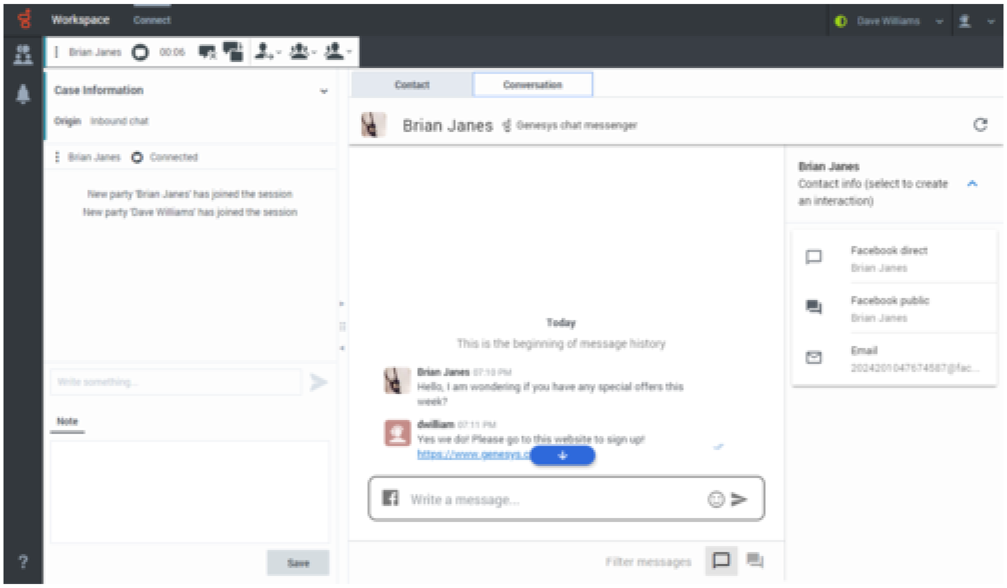
Read the messages from your contact in the Transcript area. Type your messages in the Message Composition field.

The **Contact** tab contains information about the contact including the Facebook actor name and ID. You can update the contact information and view the history of interactions with the contact.

If you have had previous chat/Facebook Messenger interactions with the contact, the full transcript is in the Conversation tab.

Conversation tab

The **Conversation** tab is displayed in the right panel of the Chat Interaction view.

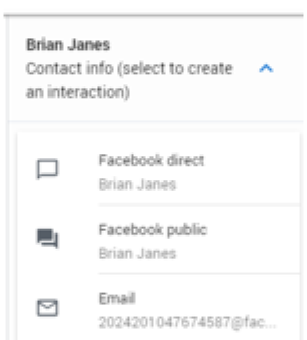


The transcript of the chat is displayed both in the Transcript area and the **Conversation** tab. The **Conversation** tab also contains the transcripts of all previous chat interactions that your contact center has had with the contact.

The **Conversation** tab allows the following actions:

- : Click to refresh the conversation display.
- : Click to send messages you type in the Message Composition area.
- : Send an emoji to your contact.
- : Filter messages to show Private type only.
- : Filter messages to show Public type only.

You can also start an interaction of Facebook direct (Facebook Messenger), Facebook public, or Email by clicking one of these buttons on the right side of the **Conversation** tab:



Tip

If you or the contact end the session, you can keep the Chat interaction view open while you perform other actions or business processes. Check with your supervisor about whether to mark the interaction as **Done** or keep the interaction view open while you perform other duties.

Keeping the interaction view active might affect your **Ready** status.

Communication tab

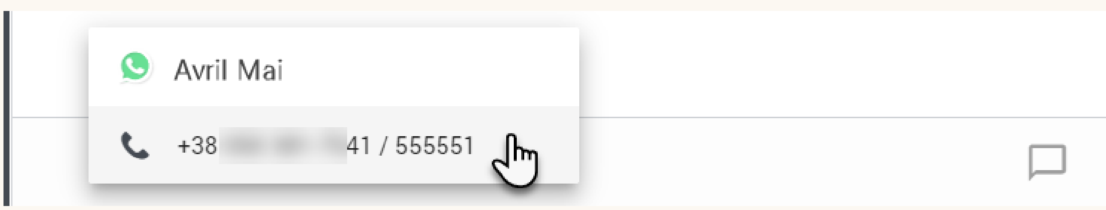
The **Communication** tab in the **Connect** group lets you continue Facebook Messenger chat conversations that you or others at your contact center have had with your company's contacts.

After an agent or the contact leaves a chat session, you can continue the conversation by finding the contact in the **Communication** tab and selecting their name from the contact list.

To continue the conversation, either type in the **Write a Message** field and click **Send** or click the **Chat** icon to open a new Chat interaction view. Your message is sent to the contact's Facebook Messenger account. The next time that they log in to Facebook they will see your message.

Important

In some environments, the **Write a Message** field is not available. To launch a new interaction with the contact click the **Chat** icon and select a channel icon, such as Chat, Email, SMS, or WhatsApp.

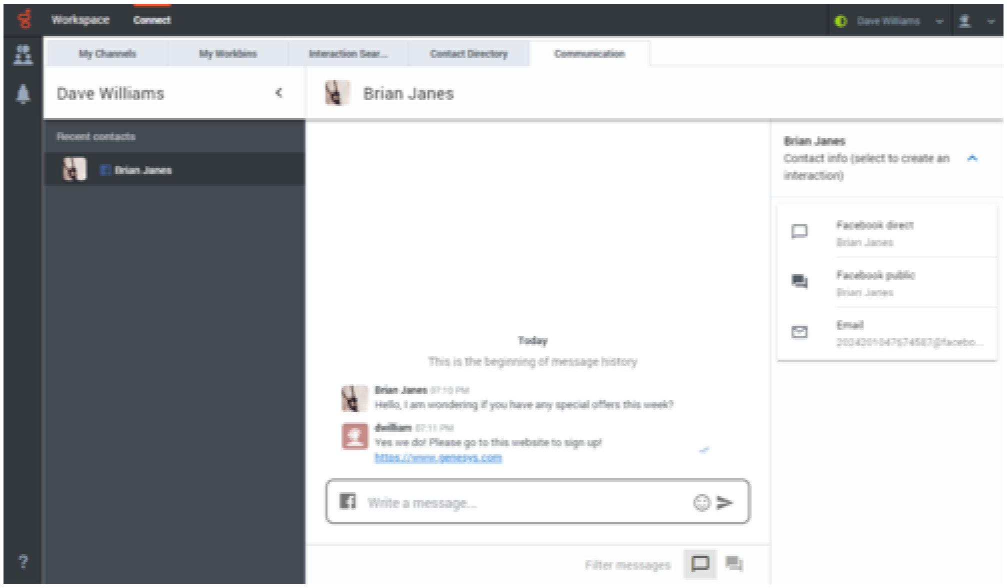


When the contact responds, you receive a notification on your desktop. Click **Show** to open the **Communication** tab of the **Connect** group. Click the **Chat** icon to open the chat in a new Chat interaction view if you need to respond and continue the conversation.

The **Communication** tab has two areas, the **Contacts** list and the conversation transcript area.

- Select a contact in the **Contacts** list to see the conversations that contact has had with with your company. If there is an unread message from one of your contacts, a number is displayed next to their name indicating the number of unread messages.
  - Choose **CHAT** to see Web Chat, SMS, Facebook Messenger, and Twitter Direct Messages transcripts.
  - Choose **OPEN MEDIA** to see public Facebook messages and Twitter Tweets that involve your company.

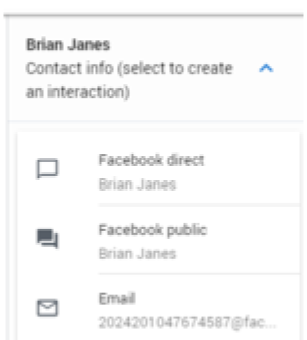
- The conversation transcript area displays all the chat interactions that the selected contact has had with your company.



The conversation area allows the following actions:

- : Click to send messages you type in the Message Composition area.
- : Attach an image.
- : Send an emoji to your contact.
- ': Click to launch the Chat Interaction window and continue the conversation there with access to all the interaction window features such as Contact Information, Contact History, and Standard Responses. **Note:** Genesys recommends that you switch to a chat interaction window whenever you want your chatting time to be recorded for KPI purposes.
- : Toggle the display of the **Contacts** list area.

You can also start an interaction of Facebook direct (Facebook Messenger), Facebook public, or Email by clicking one of these buttons on the right side of the **Communication** tab:

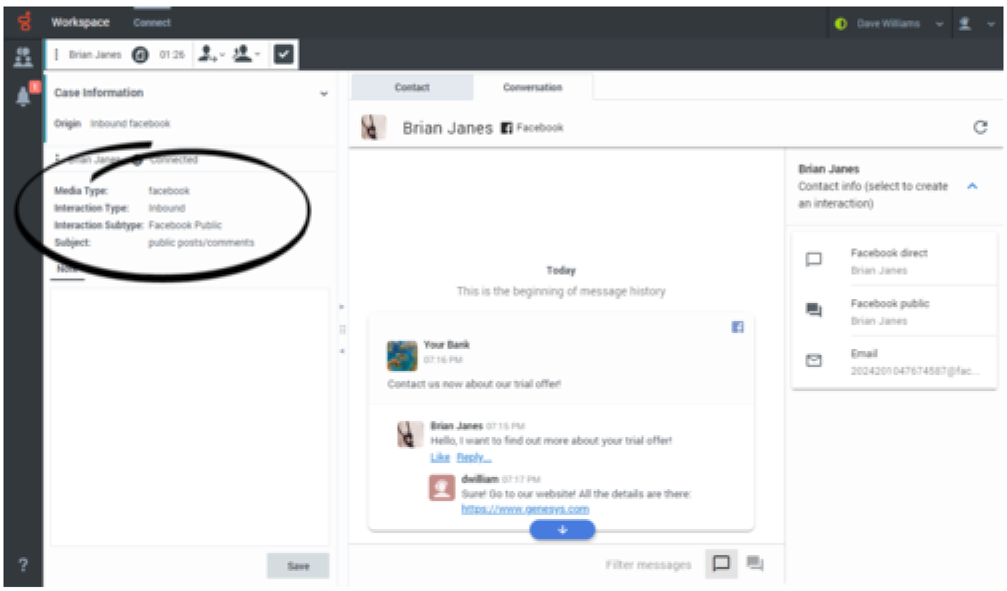


Refer to Chat for information about using the Communication tab.

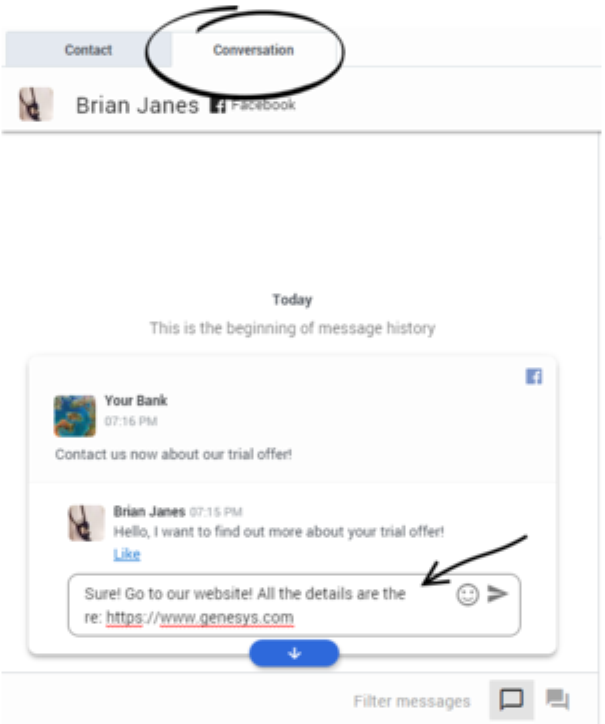
Facebook Public

When a contact replies to a post or creates a new post on your company's Facebook page a new interaction is directed to you as a new Chat interaction. You handle it just like you would any other chat message with one of your contacts. Whatever you reply is posted on your company's public Facebook page as a reply to the post from the contact. Remember, whatever you post will be seen by anyone who visits your company's Facebook page, not just the contact.

You handle a Facebook Public interaction the same way you would handle an asynchronous Chat.



Read the messages from your contact in the Conversation tab. Type your messages in the **Write a message...** field in the **Conversation** tab.



The **Contact** tab contains information about the contact including the Facebook actor name and ID. You can update the contact information and view the history of interactions with the contact.

If you have had previous chat/Facebook Public interactions with the contact, the full transcript is in the **Conversation** tab and in the Communication tab.

What next?

- Chat
- Contacts
- Team Communicator
- Internal interactions

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts

5. Contact and interaction history

Twitter Chat

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Twitter chat.

The Workspace Agent Desktop Chat channel enables you to exchange Twitter Direct Messages and Twitter Public messages with your contacts using the asynchronous chat features including the Conversation tab and the Communication tab. Your account must be enabled for Twitter to handle chat interactions from Twitter.

> **Important**
> - Some Workspace Agent Desktop features are available only for Genesys Engage cloud users. For example, not all users will see the **Conversation** and **Communication** tabs.
> - Some Workspace Agent Desktop features are available only for Genesys Engage on-premises users.
> - Due to continual changes to Agent Desktop, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you see in the product when you use it.

To receive Twitter Direct Messages and Twitter Public chat interactions, set your status on the Chat channel to **Ready**.

Social Engagement with Twitter

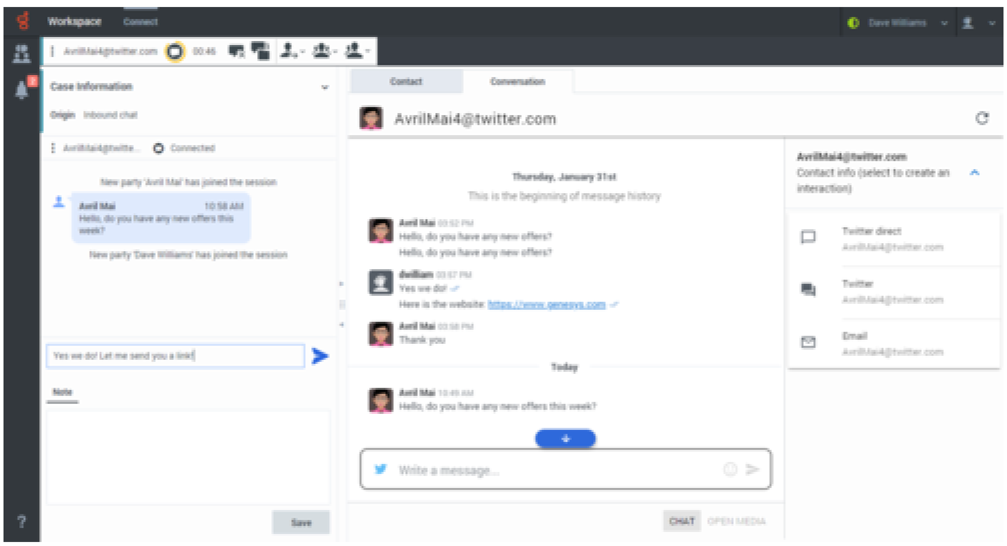
You are not restricted to private Twitter Direct Messages. You can also engage with customers by responding to public Tweets and replies from your company's Twitter page.

Using Genesys Social Engagement on Twitter you can monitor your business presence and identify and respond to online comments. Twitter Direct Messages and Tweets and replies on your company's Twitter page are monitored and then automatically routed to agents across your enterprise who are using Workspace Agent Desktop. Routing ensures that the right persons handles the customer message, whether it is an inquiry about a new business opportunity or a negative comment that you want to react to immediately.

Handling contacts using Workspace Agent Desktop's Twitter channel improves Customer Experience by providing consistent CX across all channels. Genesys Social Engagement identifies the contact and matches them against customers already in the contact database. When a Direct Message, Tweet, or reply is directed to you, you have access to all previous interactions with the contact.

Twitter Direct Message

Customers of your company who are followers of your company's Twitter page can send Twitter Direct Messages to your company's Twitter handle (for example: **@Genesys**). Instead of having to use Twitter Direct Message yourself to reply, the message is directed to you as a new Chat interaction. You handle a Twitter Direct Message interaction the same way you would handle an asynchronous Chat. Click **Accept** on the Interaction Notification and a new Chat interaction opens in Workspace.



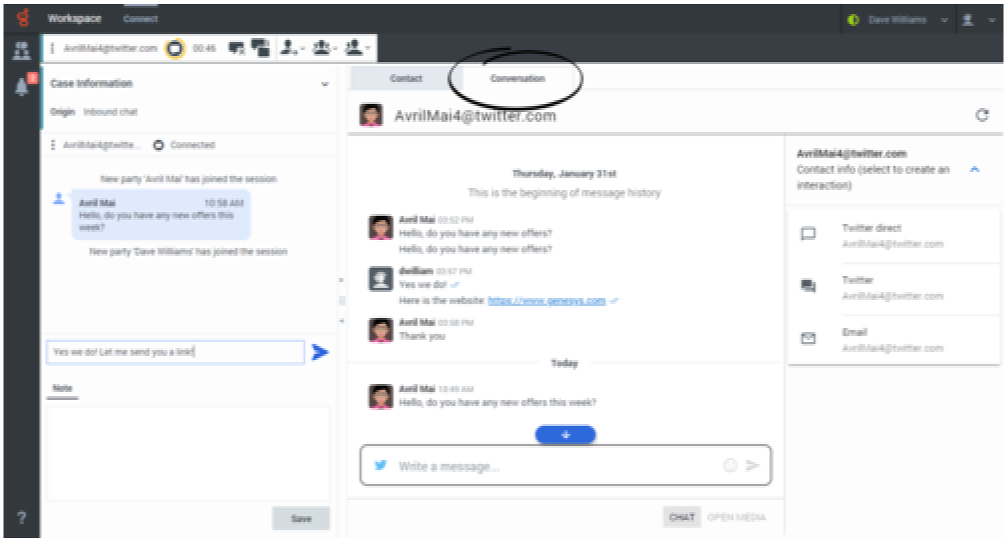
Read the messages from your contact in the Transcript area. Type your messages in the Message Composition field.

The **Contact** tab contains information about the contact including the Twitter actor name and ID. You can update the contact information and view the history of interactions with the contact.

If you have had previous chat/Twitter Direct Message interactions with the contact, the full transcript is in the Conversation tab.

Conversation tab

The **Conversation** tab is displayed in the right panel of the Chat Interaction view.



To receive chat interactions, set your status on the Chat and Twitter channels to **Ready**.

Click **Accept** when a chat notification arrives on your desktop. This opens the Chat Interaction view. Handle the Chat interaction as normal. The transcript of the chat is displayed both in the Transcript area and the **Conversation** tab. The **Conversation** tab also contains the transcripts of all previous chat interactions that your contact center has had with the contact.

The **Conversation** tab allows the following actions:

- : Click to refresh the conversation display.
- : Click to send messages you type in the Message Composition area.
- : Send an emoji to your contact.

> ## Tip
> If you or the contact end the session, you can keep the Chat interaction view open while you perform other actions or business processes. Check with your supervisor about whether to mark the interaction as **Done** or keep the interaction view open while you perform other duties.
>
> Keeping the interaction view active might affect your **Ready** status.

Communication tab

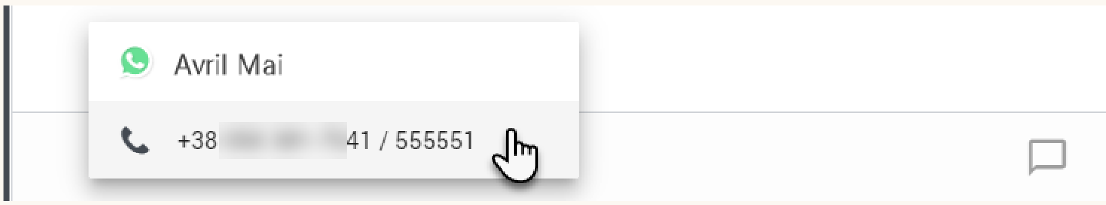
The **Communication** tab in the **Connect** group lets you continue chat conversations that you or others at your contact center have had with your company's contacts.

After an agent or the contact leaves a chat session, you can continue the conversation by finding the contact in the **Communication** tab and selecting their name from the contact list.

To continue the conversation, either type in the **Write a Message** field and click **Send** or click the **Twitter direct** icon to open a new Chat interaction view.

Important

In some environments, the **Write a Message** field is not available. To launch a new interaction with the contact click the **Chat** icon and select a channel icon, such as Chat, Email, SMS, or WhatsApp.

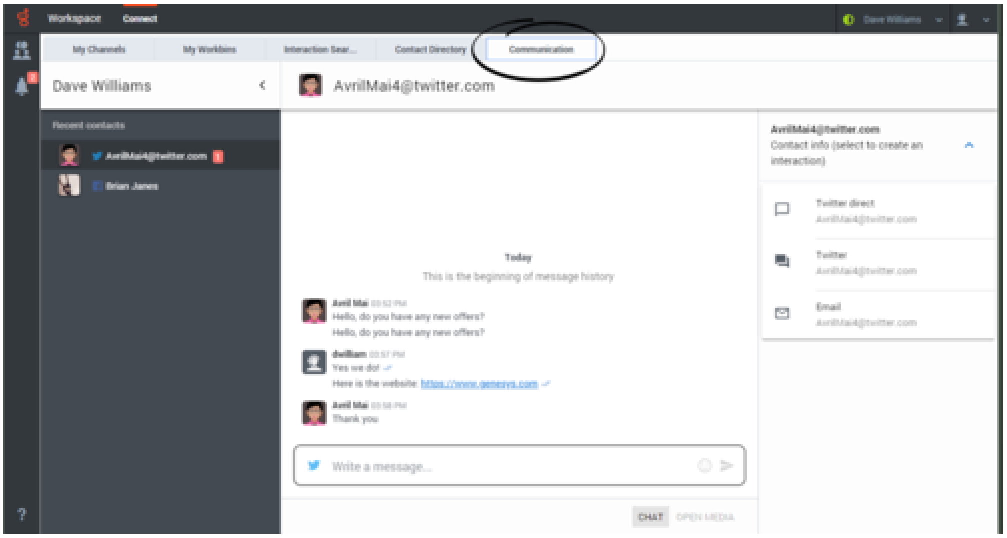


For chat interactions that originated as Twitter Direct Messages, when you send a message, the contact will see it the next time they log in to Twitter.

When the contact responds, you receive a notification on your desktop. Click **Show** to open the **Communication** tab of the **Connect** group. Click the **Twitter direct** icon to open the chat in a new Chat interaction view if you need to respond and continue the conversation.

The **Communication** tab has two areas, the **Contacts** list and the conversation transcript area.

- Select a contact in the **Contacts** list to see the conversations that contact has had with with your company.
  - Choose **CHAT** to see Web Chat, SMS, Facebook Messenger, and Twitter Direct Messages transcripts.
  - Choose **OPEN MEDIA** to see public Facebook messages and Twitter Tweets that involve your company.
- The conversation transcript area displays all the chat interactions that the selected contact has had with your company.



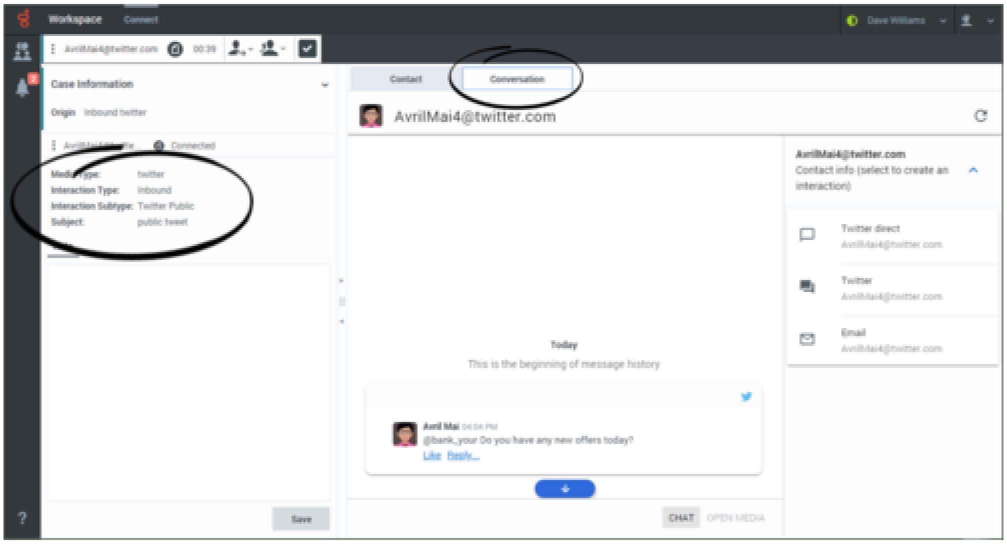
The conversation area allows the following actions:

- : Click to send messages you type in the Message Composition area.
- : Send an emoji to your contact.
- : Click to launch the Chat Interaction window and continue the conversation there with access to all the interaction window features such as Contact Information, Contact History, and Standard Responses. **Note:** Genesys recommends that you switch to a chat interaction window whenever you want your chatting time to be recorded for KPI purposes.
- : Toggle the display of the **Contacts** list area.

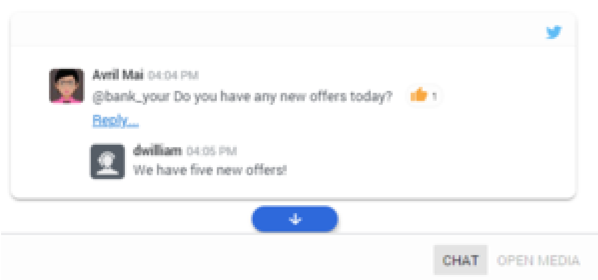
Refer to Chat for information about using the Communication tab.

Twitter Public

When a contact replies to a Tweet or creates a new Tweet on your company's Twitter page, the Tweet is directed to you as a new Twitter interaction. However, because Public Tweets can be created in a non-linear fashion, a Public Tweet interaction must be handled by using the **Conversation** or **Communication** tab. There is no transcript or message field on the left side of the interaction view.



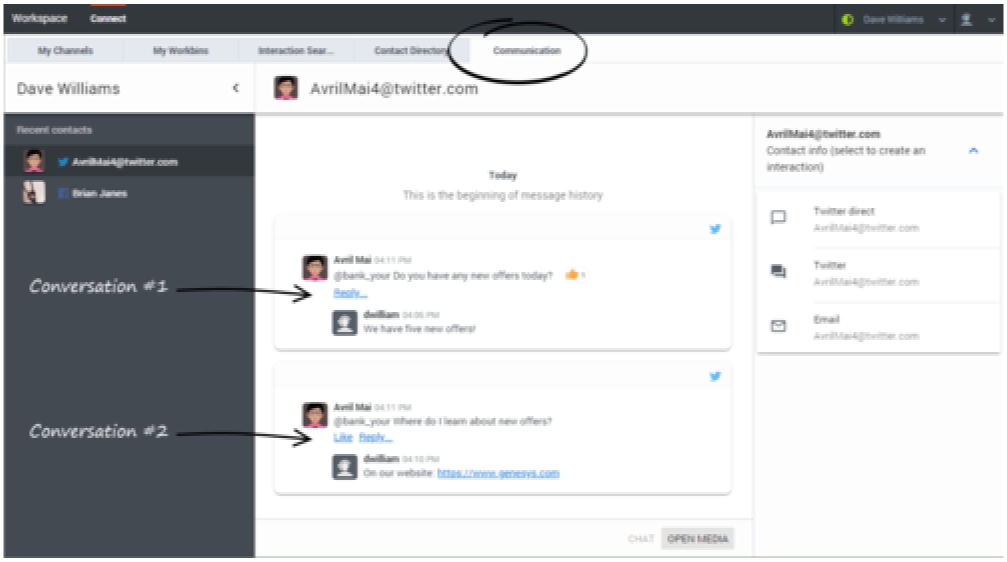
To respond to the Tweet click **Reply**. You can also click **Like** . Type your reply in the message box and click **Send**. In the **Conversation** tab your response appears indented below the Tweet from the contact, and whatever you reply is posted on your company's public Twitter page as a reply to the Tweet from the contact. Remember, whatever you post will be seen by anyone who visits your company's Twitter page, not just the contact.



The **Contact** tab contains information about the contact including the Twitter actor name and ID. You can update the contact information and view the history of interactions with the contact.

If you have had previous chat/Twitter Public interactions with the contact, the full transcript is in the **Conversation** tab and in the Communication tab.

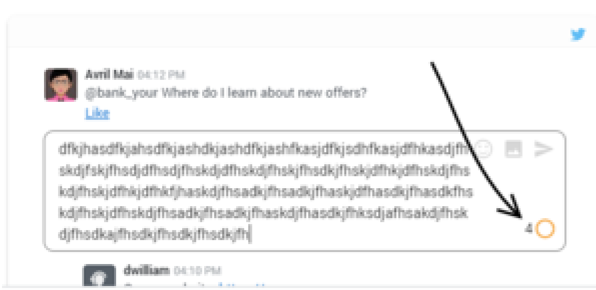
In the **Communication** tab select a contact and then click **OPEN MEDIA** to see all the public Twitter interactions your company has had with the contact. Because social media is non-linear, you can scroll through the transcript and like and respond to any of the Tweets and replies. Think of each Tweet and reply sequence as a separate conversation.



The conversation area allows the following actions:

- : Click to send messages you type in the Message Composition area.
- : Send an emoji to your contact.
- : Attach an image.
- : Click to launch the Chat Interaction window and continue the conversation there with access to all the interaction window features such as Contact Information, Contact History, and Standard Responses. **Note:** Genesys recommends that you switch to a chat interaction window whenever you want your chatting time to be recorded for KPI purposes.
- : Toggle the display of the **Contacts** list area.

As you type your reply in the **Reply** field the small grey circle on the right begins to turn black. This circle is a progress indicator to let you know how close you are to the maximum number of allowable characters. As you get close to the maximum a character countdown is displayed and the circle turns yellow. If you exceed the limit the circle turns red and you will not be able to send your reply until you adjust the wording to make it shorter.



What next?

- Chat
- Contacts
- Team Communicator
- Internal interactions

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

WhatsApp Chat

> **Important**
>
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to WhatsApp Chat.

The Workspace Agent Desktop Chat channel enables you to exchange chat messages with a contact. This is called a chat interaction. Chat interactions include Web Chat, WhatsApp messages, Facebook Messenger, Twitter Direct Messages, and SMS messages.

> **Important**
>
> - Due to continual changes to Agent Desktop, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you see in the product when you use it.
> - Some Workspace Agent Desktop features are available only for Genesys Engage cloud users.

The chat interaction is directed to your desktop, you exchange messages, and when either you or the contact ends the chat session, the interaction is ended and must be closed and marked as **Done**. However, sometimes you need to continue a chat conversation. Perhaps you had to take time to find additional information for the contact or initiate a business process in your company before continuing the conversation.

If your account is enabled for asynchronous chat, you can continue a chat interaction after the initial interaction is ended by using the Conversation tab in the interaction window or the Communication tab.

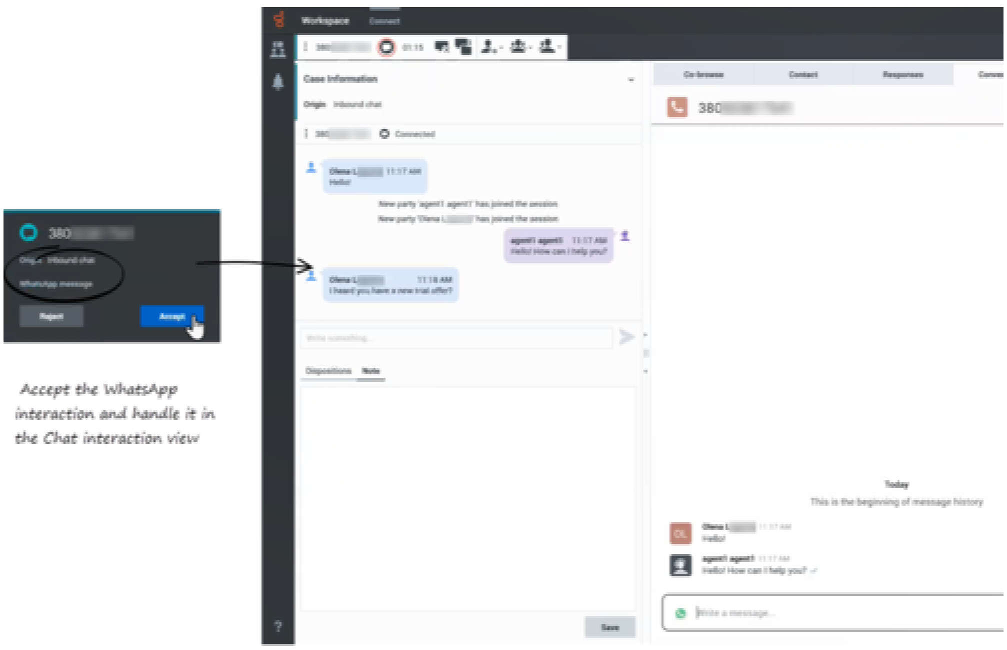
If you have not yet marked a closed interaction as **Done**, in the **Conversation** tab, the transcript of your current interaction as well as all previous chat interactions with the contact is displayed. You can scroll through it or use the Search feature to find messages containing keywords. To reactivate the Chat session, type your message in the Message field and click **Send**.

If you want to reactivate an interaction that is already closed and marked as **Done**, in the **Connect** group, select the **Communication** tab, open the **Contact** panel and select the contact. All previous Chat interactions that your contact center has had with the contact are displayed in the transcript area on the right. To reactivate the chat interaction, click the **Chat** button () to open the Chat interaction view.

WhatsApp Interactions

WhatsApp is a messaging service that enables the exchange of text messages, emojis, images, and Highly Structured Messages (HSM) between you and a contact through your computer. Typically, a contact will send you a message from a mobile device or computer. From your point of view, handling an WhatsApp chat session is no different than handling any other Chat session, whether you are handling a one time interaction or are continuing a conversation.

When a contact sends a WhatsApp message from their device to your company's WhatsApp channel it is directed to you as a Chat and you handle it just like you would any other chat message with one of your contacts.



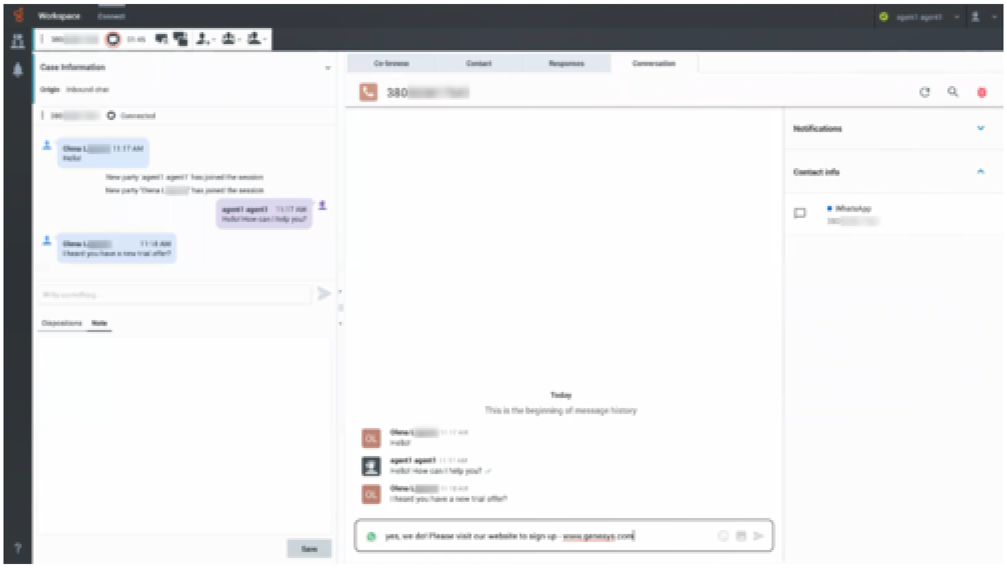
Read the messages from your contact in the Transcript area. Type your messages in the Message Composition field.

The **Contact** tab contains information about the contact including the phone number that sent the WhatsApp message if applicable. You can update the contact information and view the history of interactions with the contact.

If you have had previous chat/WhatsApp interactions with the contact, the full transcript is in the Conversation tab.

Conversation tab

The **Conversation** tab is displayed in the right panel of the Chat Interaction view.

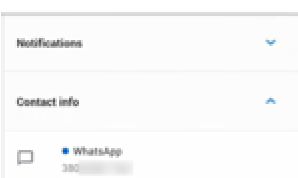


The transcript of the chat is displayed both in the Transcript area and the **Conversation** tab. The **Conversation** tab also contains the transcripts of all previous chat interactions that your contact center has had with the contact.

The **Conversation** tab allows the following actions:

- : Click to refresh the conversation display.
- : Click to send messages you type in the Message Composition area.
- : Attach an image.
- : Send an emoji to your contact.
- CHAT: Filter messages to show chat (private) type only.
- OPEN MEDIA: Filter messages to show open media (public) type only.

You can also start a WhatsApp interaction by clicking one of these buttons on the right side of the **Conversation** tab:



Tip

If you or the contact end the session, you can keep the Chat interaction view open while you perform other actions or business processes. Check with your supervisor about whether to mark the interaction as **Done** or keep the interaction view open while you perform other duties.

Keeping the interaction view active might affect your **Ready** status.

Communication tab

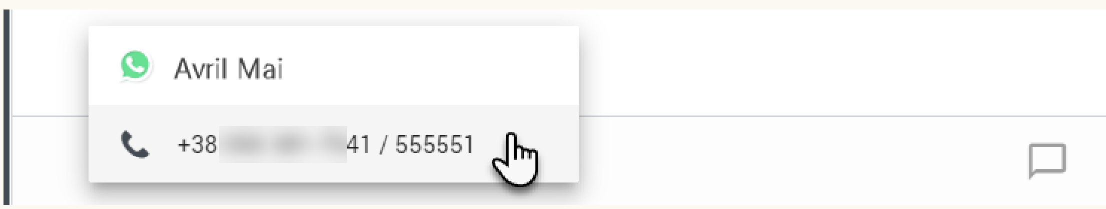
The **Communication** tab in the **Connect** group lets you continue WhatsApp chat conversations that you or others at your contact center have had with your company's contacts.

After an agent or the contact leaves a chat session, you can continue the conversation by finding the contact in the **Communication** tab and selecting their name from the contact list.

To continue the conversation, either type in the **Write a Message** field and click **Send** or click the **Chat** icon to open a new Chat interaction view. Your message is sent to the contact's device.

Important

In some environments, the **Write a Message** field is not available. To launch a new interaction with the contact click the **Chat** icon and select a channel icon, such as Chat, Email, SMS, or WhatsApp.

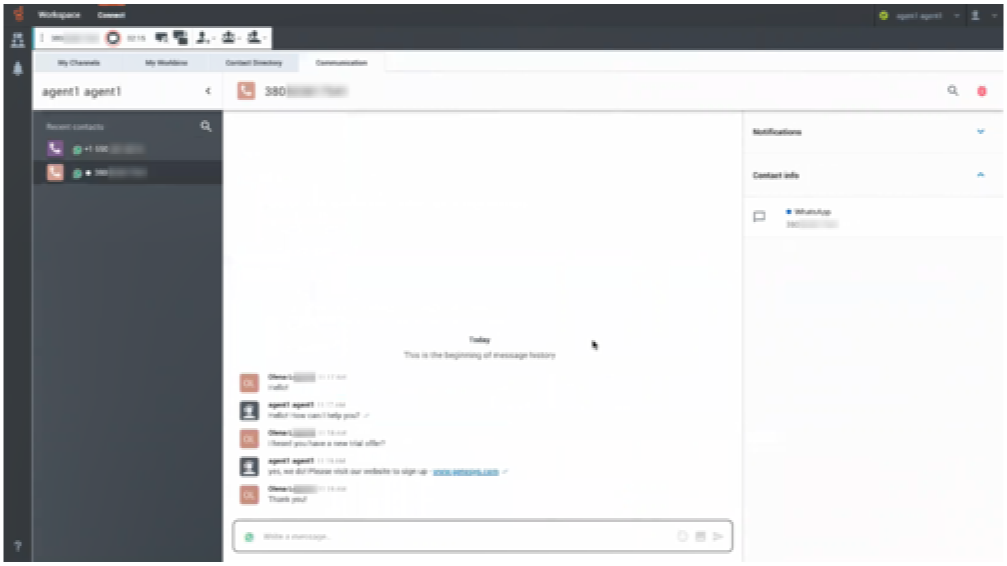


When the contact responds, you receive a notification on your desktop. Click **Show** to open the **Communication** tab of the **Connect** group. Click the **Chat** icon to open the chat in a new Chat interaction view if you need to respond and continue the conversation.

The **Communication** tab has two areas, the **Contacts** list and the conversation transcript area.

- Select a contact in the **Contacts** list to see the conversations that contact has had with with your company. If there is an unread message from one of your contacts, a number is displayed next to their name indicating the number of unread messages.
    - Choose **CHAT** to see Web Chat, WhatsApp, Facebook Messenger, Twitter Direct Messages, and SMS transcripts.
    - Choose **OPEN MEDIA** to see public Facebook messages and Twitter Tweets that involve your company.

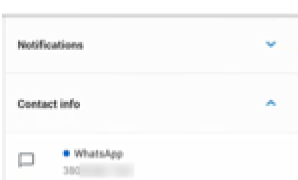
- The conversation transcript area displays all the chat interactions that the selected contact has had with your company.



The conversation area allows the following actions:

- : Click to send messages you type in the Message Composition area.
- : Attach an image.
- : Send an emoji to your contact.
- ': Click to launch the Chat Interaction window and continue the conversation there with access to all the interaction window features such as Contact Information, Contact History, and Standard Responses. **Note:** Genesys recommends that you switch to a chat interaction window whenever you want your chatting time to be recorded for KPI purposes.
- : Toggle the display of the **Contacts** list area.

You can also start a WhatsApp interaction by clicking one of these buttons on the right side of the **Communication** tab:



Refer to Chat for information about using the Communication tab.

What next?

- Chat
- Contacts
- Team Communicator
- Internal interactions

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

SMS Chat

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to SMS Chat.

The Workspace Agent Desktop Chat channel enables you to exchange chat messages with a contact. This is called a chat interaction. Chat interactions include Web Chat, SMS messages, Facebook Messenger, and Twitter Direct Messages.

Important

- Due to continual changes to Agent Desktop, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you see in the product when you use it.
- Some Workspace Agent Desktop features are available only for Genesys Engage cloud users.

The chat interaction is directed to your desktop, you exchange messages, and when either you or the contact ends the chat session, the interaction is ended and must be closed and marked as **Done**. However, sometimes you need to continue a chat conversation. Perhaps you had to take time to find additional information for the contact or initiate a business process in your company before continuing the conversation.

If your account is enabled for asynchronous chat, you can continue a chat interaction after the initial interaction is ended by using the Conversation tab in the interaction window or the Communication tab.

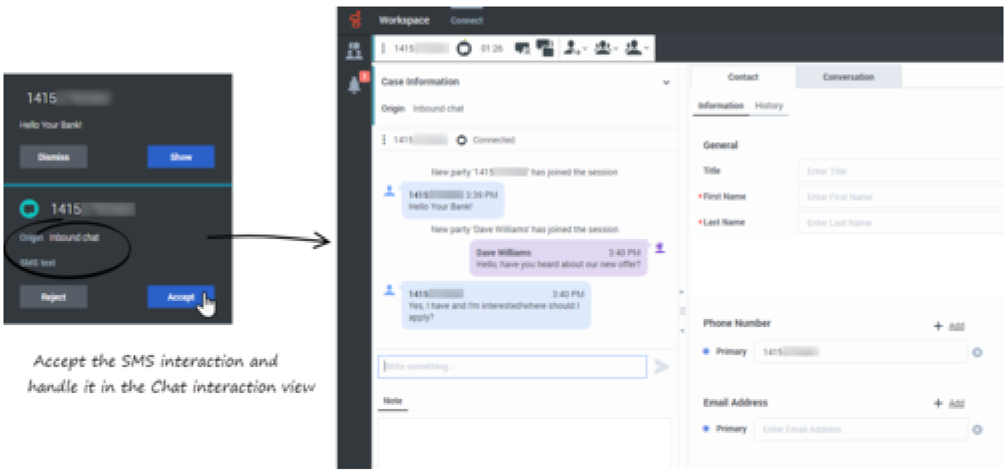
If you have not yet marked a closed interaction as **Done**, in the **Conversation** tab, the transcript of your current interaction as well as all previous chat interactions with the contact is displayed. You can scroll through it or use the Search feature to find messages containing keywords. To reactivate the Chat session, type your message in the Message field and click **Send**.

If you want to reactivate an interaction that is already closed and marked as **Done**, in the **Connect** group, select the **Communication** tab, open the **Contact** panel and select the contact. All previous Chat interactions that your contact center has had with the contact are displayed in the transcript area on the right. To reactivate the chat interaction, click the **SMS** button in the **Contact info** column to open the Chat interaction view.

SMS Interactions

Short Message Service (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. From your point of view, handling an SMS chat session is no different than handling any other Chat session, whether you are handling a one time interaction or are continuing a conversation.

When a contact sends an SMS from their device to your company's SMS channel it is directed to you as a Chat and you handle it just like you would any other chat message with one of your contacts.



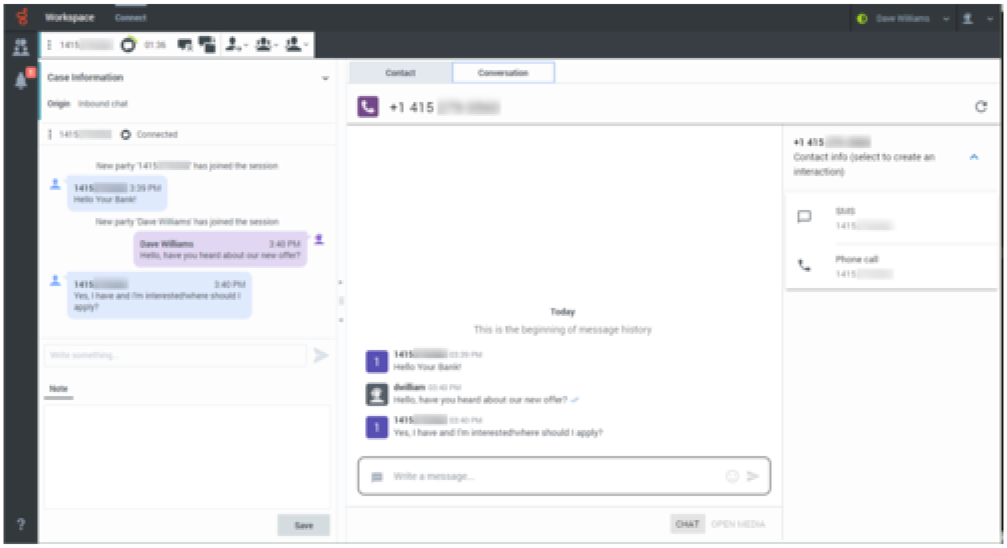
Read the messages from your contact in the Transcript area. Type your messages in the Message Composition field.

The **Contact** tab contains information about the contact including the phone number that sent the SMS. You can update the contact information and view the history of interactions with the contact.

If you have had previous chat/SMS interactions with the contact, the full transcript is in the Conversation tab.

Conversation tab

The **Conversation** tab is displayed in the right panel of the Chat Interaction view.

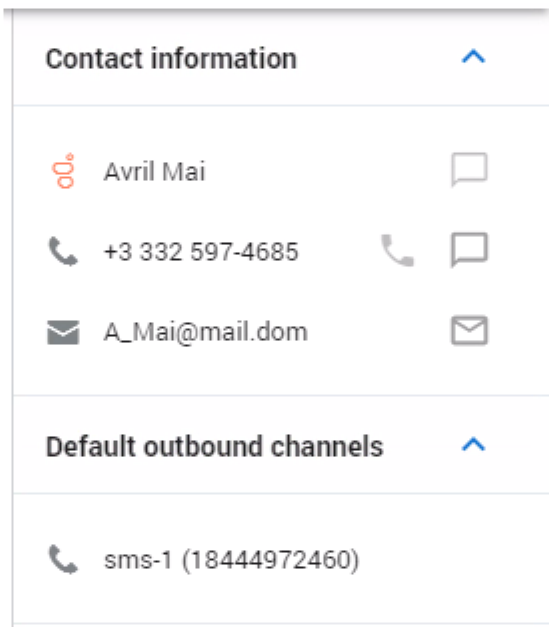


The transcript of the chat is displayed both in the Transcript area and the **Conversation** tab. The **Conversation** tab also contains the transcripts of all previous chat interactions that your contact center has had with the contact.

The **Conversation** tab allows the following actions:

- : Click to refresh the conversation display.
- : Click to send messages you type in the Message Composition area.
- : Send an emoji to your contact.
- **CHAT**: Filter messages to show chat (private) type only.
- **OPEN MEDIA**: Filter messages to show open media (public) type only.

To launch an interaction, such as a chat or an SMS, click the interaction type in the **Contact info** column. This launches the Chat Interaction window and enables you to continue the conversation there with access to all the interaction window features such as Contact Information, Contact History, and Standard Responses. **Note:** Genesys recommends that you switch to a chat interaction window whenever you want your chatting time to be recorded for KPI purposes.



Tip

If you or the contact end the session, you can keep the Chat interaction view open while you perform other actions or business processes. Check with your supervisor about whether to mark the interaction as **Done** or keep the interaction view open while you perform other duties.

Keeping the interaction view active might affect your **Ready** status.

Communication tab

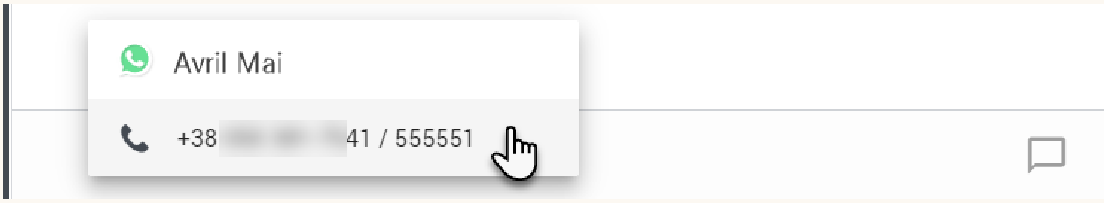
The **Communication** tab in the **Connect** group lets you continue SMS chat conversations that you or others at your contact center have had with your company's contacts.

After an agent or the contact leaves a chat session, you can continue the conversation by finding the contact in the **Communication** tab and selecting their name from the contact list.

To continue the conversation, either type in the **Write a Message** field and click **Send** or click the **Chat** icon to open a new Chat interaction view. Your message is sent to the contact's device.

Important

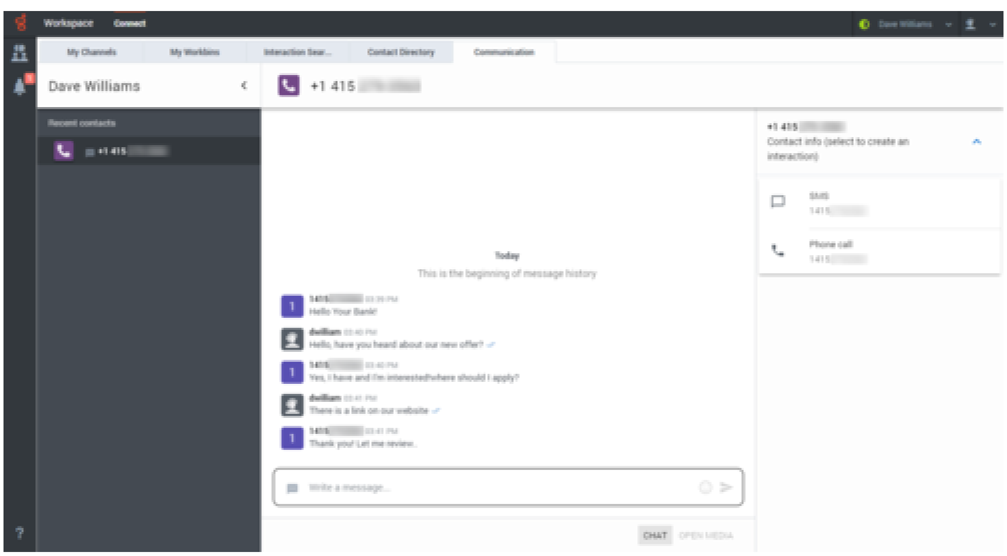
In some environments, the **Write a Message** field is not available. To launch a new interaction with the contact click the **Chat** icon and select a channel icon, such as Chat, Email, SMS, or WhatsApp.



When the contact responds, you receive a notification on your desktop. Click **Show** to open the **Communication** tab of the **Connect** group. Click the **Chat** icon to open the chat in a new Chat interaction view if you need to respond and continue the conversation.

The **Communication** tab has two areas, the **Contacts** list and the conversation transcript area.

- Select a contact in the **Contacts** list to see the conversations that contact has had with with your company. If there is an unread message from one of your contacts, a number is displayed next to their name indicating the number of unread messages.
    - Choose **CHAT** to see Web Chat, SMS, Facebook Messenger, and Twitter Direct Messages transcripts.
    - Choose **OPEN MEDIA** to see public Facebook messages and Twitter Tweets that involve your company.
- The conversation transcript area displays all the chat interactions that the selected contact has had with your company.



The conversation area allows the following actions:

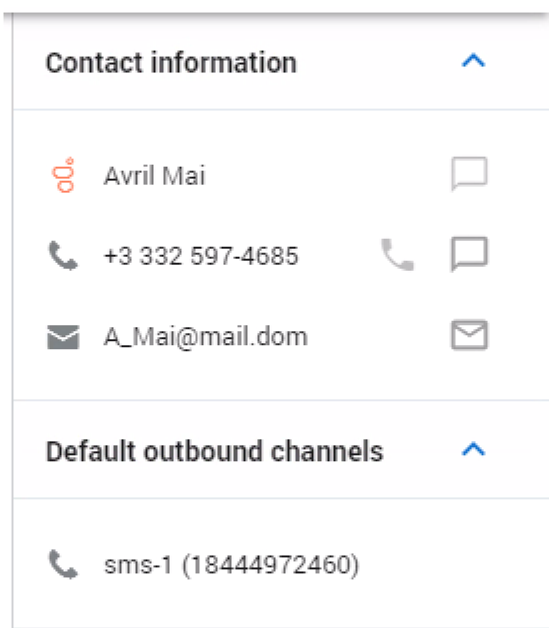
- : Click to send messages you type in the Message Composition area.

- : Send an emoji to your contact.
- : Toggle the display of the **Contacts** list area.

To launch an interaction, such as a chat or an SMS, click the interaction type in the **Contact info** column. This launches the Chat Interaction window and enables you to continue the conversation there with access to all the interaction window features such as Contact Information, Contact History, and Standard Responses.

Notes:

- Genesys recommends that you switch to a chat interaction window whenever you want your chatting time to be recorded for KPI purposes.
- Not all phone numbers can receive SMS. If Agent Desktop detects that it is not possible to send an SMS to the number you choose, you will receive a warning message.



Refer to Chat for information about using the Communication tab.

What next?

- Chat
- Contacts
- Team Communicator
- Internal interactions

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

Workitems

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Workitems.

Workitems, called Open Media by Genesys Digital channels, are documents that might be directed to you for handling. They include many media types, such as faxes or PDFs, that you might have to view while you are handling interactions of another type, such as email.

The Workitem interaction window enables you to view all of the information necessary to handle a workitem.

How do I handle a workitem?

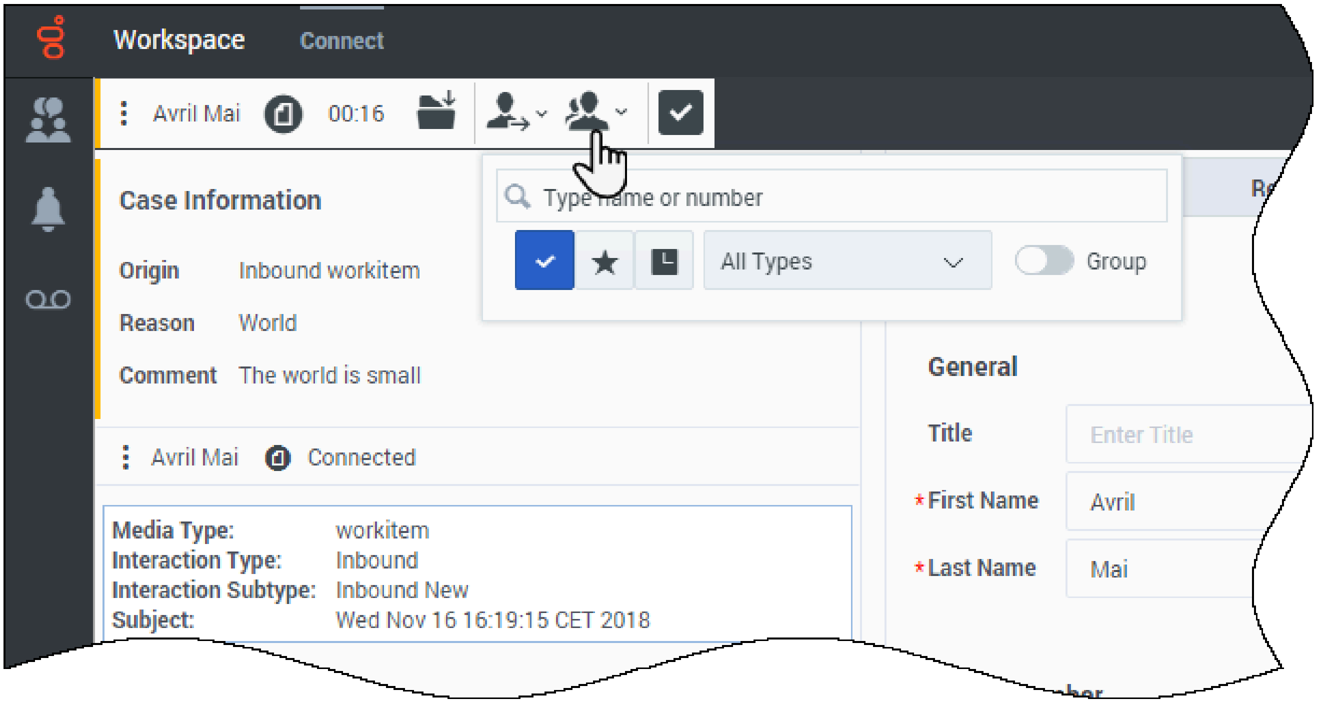
Link to video

Typical actions you can take with a workitem are:

-  to transfer the workitem to another agent.
- View the associated case data.
- Add a note or disposition code.
- Mark it as done.
- Move it to your in-progress workbin to work on later.
- Sometimes Workspace is unable to assign a call to a contact or it assigns the call to the wrong contact. Your account might be set up to let you assign or change a contact in the **Contact** tab.

Watch the video to see what happens when a workitem arrives at a workstation.

How can I get help with a workitem?



- Check the associated case data for information that might help you.
- Call the contact, if your site has this feature and their number is available in your contacts list.
- to start a consultation with a team member. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

If you are transferring the workitem to someone else, you can add your own notes or instructions for that person to review.

Transferring a Workitem

To transfer a workitem that you have accepted, click the **Workitem Transfer** ( ) is displayed. Choose a transfer target. The target must be set up to receive interactions of the type of the workitem. Select **<workitem type> Transfer**.

If the target accepts the interaction, the interaction window on your desktop closes.

If the target rejects the interaction, the interaction window reopens on your desktop and displays an error that informs you that the target has rejected the interaction.

What next?

- Contacts
- Team Communicator
- Internal interactions
- See your workitem in My History
- Open a workitem from a workbin

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

Standard responses

Important

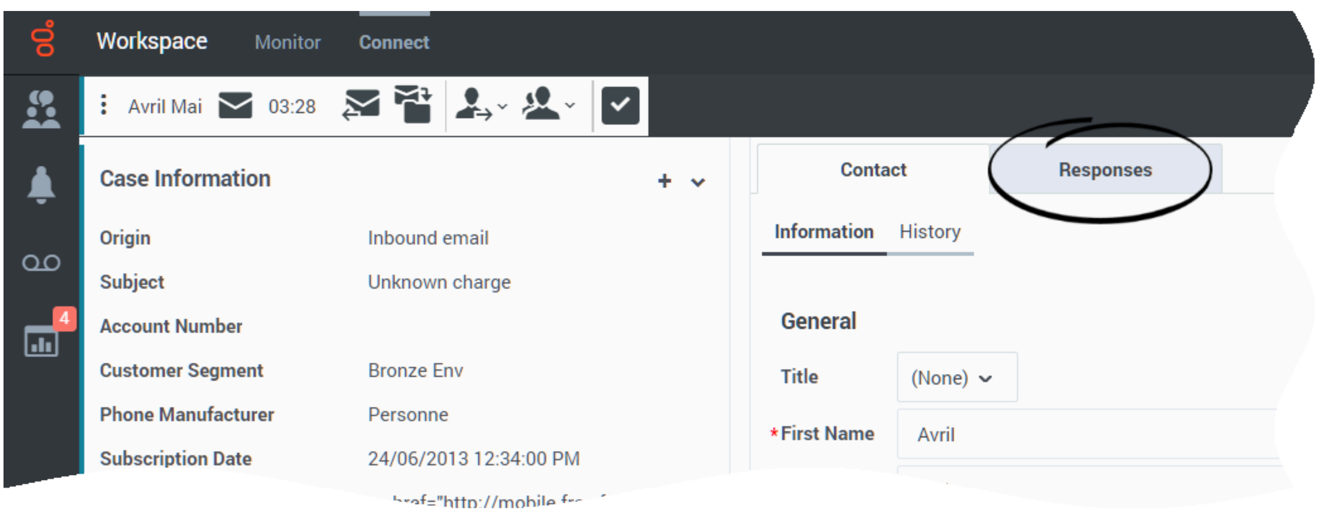
This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Standard responses.

While you are handling an interaction, you can use the Responses tab in the interaction view to access a database of pre-written standard responses for your interactions. You can insert a response as a reply into any outbound interaction, such as an email or a chat message, or you can read them to the contact during a phone interaction.

After inserting a response into an outbound interaction, such as an email or a chat message, you can modify the contents of the text.

Link to video

Using the Responses View

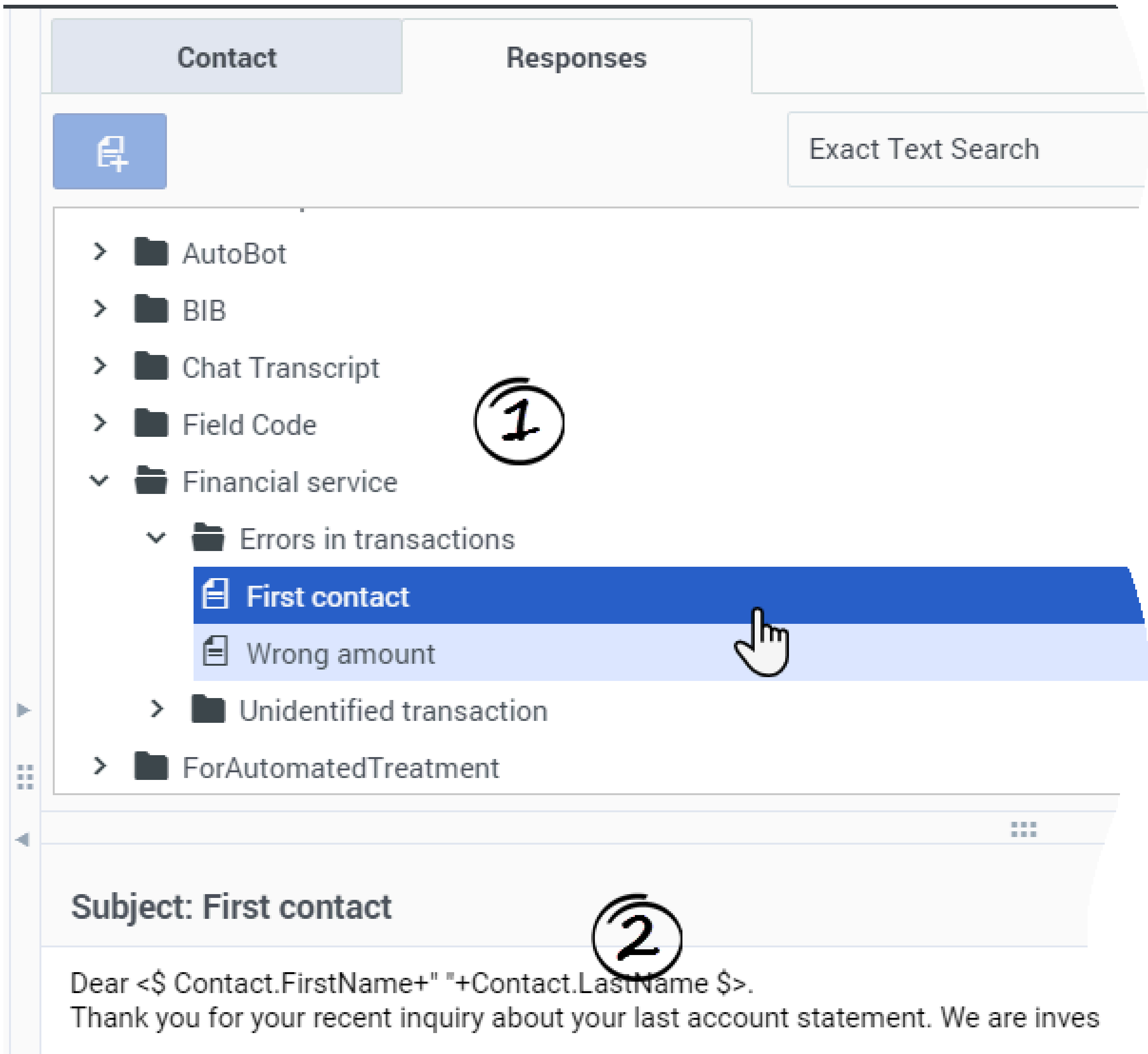


To access the Responses view, select the vertical **RESPONSES** button on the active-interaction window.

The Responses view comprises two main areas: the Responses Explorer folder view and the response display area. You can find responses in one of two ways:

1. Browse using the Responses Explorer folder view
2. Search the responses database by typing in the Search and Filter field.

Responses Explorer



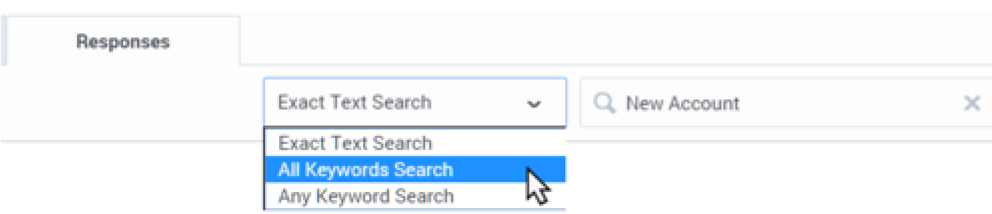
The Responses Explorer contains a tree view of folders (standard-response categories) and pages (standard-response documents). You can:

- Select a response in the explorer area (1) to view its contents (2).
- Navigate the responses folders and documents by selecting folders to open or close them and selecting documents to select them.
- Insert standard-response text into the current interaction at the insertion point by selecting a response document and then selecting **Insert Standard Response Text** .
- Show and hide the responses details area by selecting **Show Detail/Hide Detail** .
- View the contents of the selected response document in the responses details area.
- Copy content from the responses details area and paste it into the message area of your email or chat interaction. Standard responses use "tokens" (such as `<$ Contact.FullName $>`) that replace a code with specific text. For instance, `Dear <$ Contact.FullName $>` becomes `Dear John Smith` in the email. If you copy and paste token code (such as `<$ Contact.FullName $>`) into your draft email, the replacement happens only after you send the email. To see the replacement text before sending, you must click **Insert Standard Response Text**.

Search and Filter

The Search and Filter area enables you to specify keywords for which to search in your company's Standard Response Library. It has the following features:

- **Search field**—Enter the keyword for which you want to search, and click the magnifying-glass icon to initiate the search.
- **Search type**—A drop-down list that enables you to search using one of the following strategies:
  - **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.



Tip

The search is applied to the selected view; to clear the search criteria and display all contents, click the **X** in the search field.

What next?

- Calls
- Chat
- Email
- Navigating Agent Desktop

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

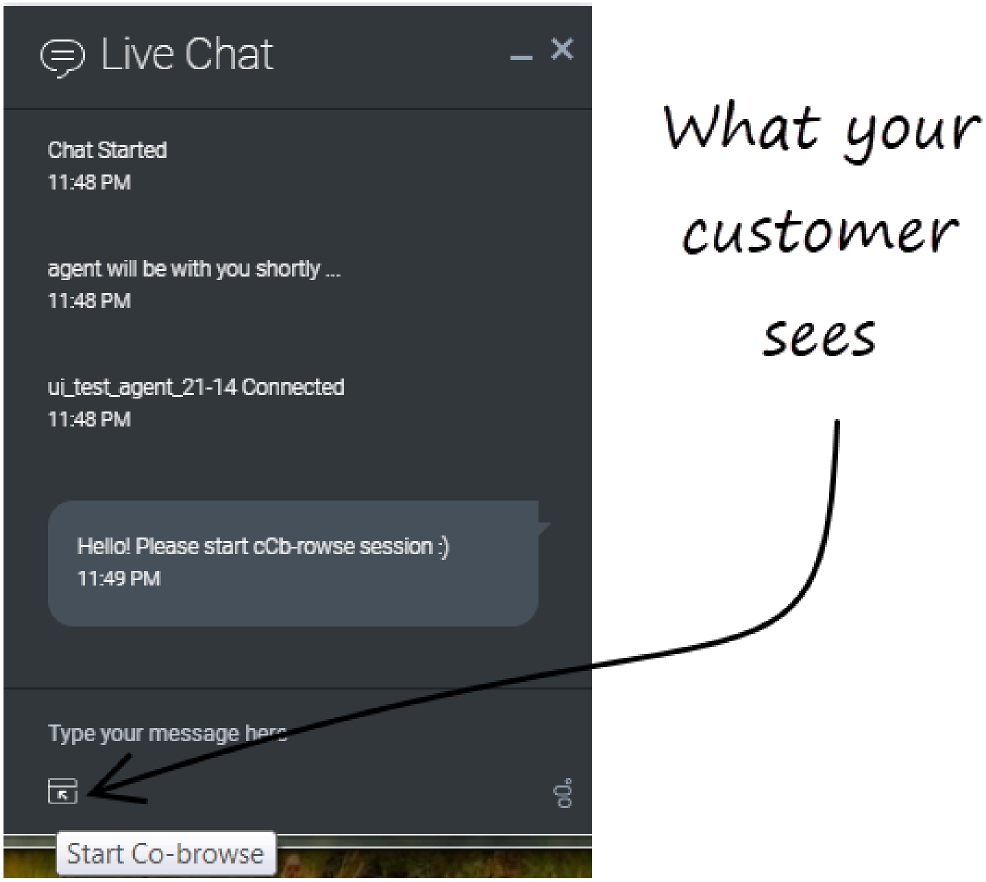
Co-browse sessions

> **Important**
>
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Co-browse sessions.

A Genesys Co-browse session lets you and a contact navigate the same web page at the same time. Unlike conventional screen-sharing applications where one party sees an image of the other party's browser, in a Genesys Co-browse session both you and the contact share the same instance of the web page.

> **Important**
>
> This Workspace Agent Desktop feature is available only for Engage Cloud users.

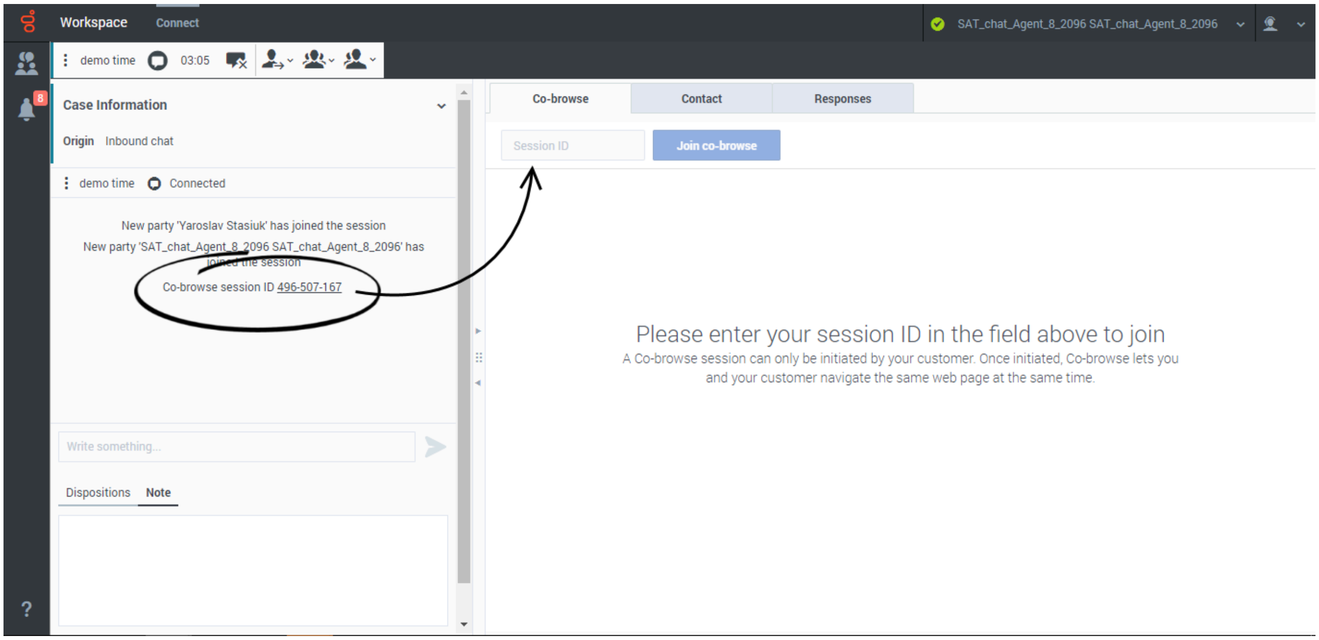
Start a Co-browse session



Your contact *must* initiate a Co-browsing session. You cannot start a Co-browse session. Websites set up for Genesys Co-browse include a widget with a **Start Co-browse** button that the contact must click to start a Co-browsing session.

One of the widgets that your customer sees might look something like this. Clicking the **Start Co-browse** button will present the customer with a session ID.

When you want to co-browse a web page with your contact, ask them to look for the widget and click the button.



If you are engaged in a chat interaction with your contact, the Co-browse session starts automatically. Once the Co-browsing session starts, you see a special message in the chat transcript that contains the session ID. Click the **Co-browse** tab to view it or click the session ID link in the chat transcript to open the **Co-browse** tab to view the session.

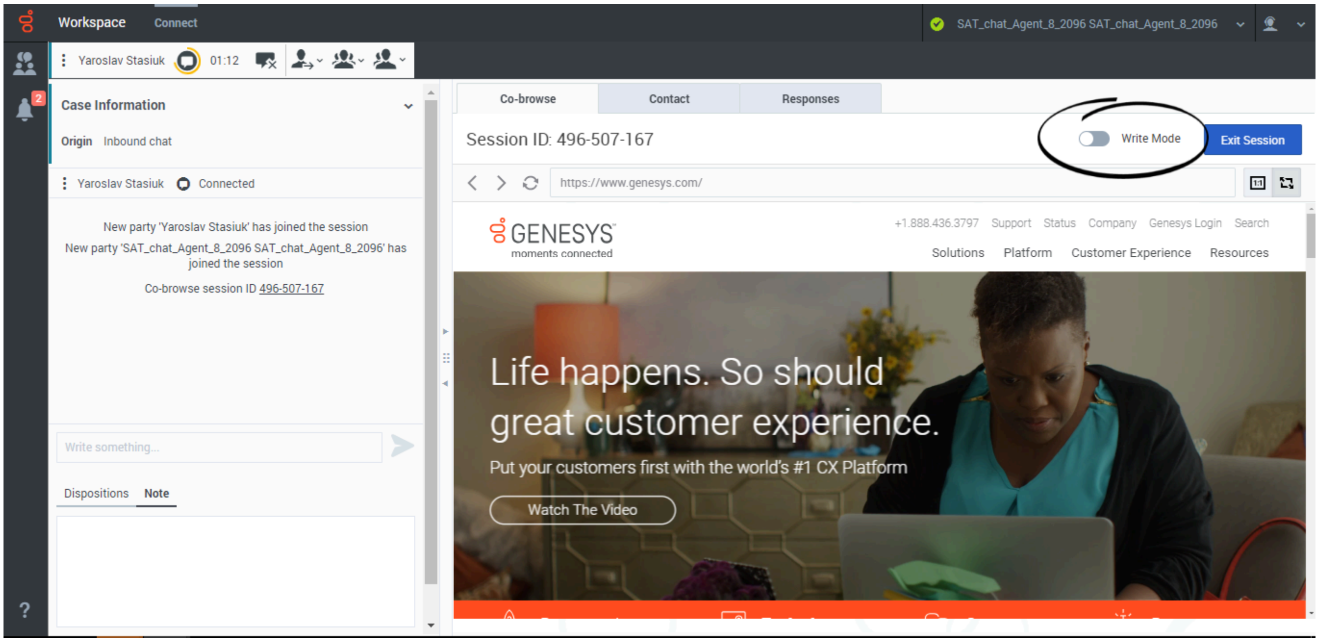
On a voice interaction, you must ask your contact to tell you the session ID that is displayed on their screen. Enter the session ID in the **Session ID** field, then click **Join co-browse**.

You should now see the contact's browser. You do not need to navigate to the same page as the contact. Co-browse uses the session ID to make sure that you and the contact are viewing the same page. As soon as the session starts, the contact receives a notification on their screen that they have started a Co-browsing session.

Important

- You can only have one Co-browse session open at a time (regardless of how many chat sessions you might be handling).
- Genesys Co-browse does not support conference or transfer for chat and voice.

Using Pointer mode and switching to Write mode



When you first join a Co-browse session, you are in **Pointer** mode (Write mode is off). You can see what the contact sees and navigate within the web page using scrollbars, but you cannot perform any actions in their browser. You cannot navigate, input information, or submit forms.

You and the contact can see each other's mouse movements at all times and your mouse clicks create a **red circle effect** around your mouse pointer. Use the red circle effect to direct the contact to specific sections on the web page.

At any time, you can ask the contact to enable **Write** mode. First ask the contact if you can take control of the co-browsing session. When the contact agrees, click the toggle next to **Write Mode** at the top of the **Co-browse** tab. A confirmation message is sent to your contact. When they approve the mode toggle changes to on and you are in **Write** mode.

Tip

If **Write** mode is disabled by your administrator, the mode toggle is not displayed.

Using Write Mode and switching to Pointer mode

In **Write** mode, both you and your contact can perform conventional user actions. *Both* of you can enter text and click buttons.

In **Write** mode, you can navigate by clicking links in the web page or by using the following navigation options in Agent Desktop:

- Click the back and forward arrows to navigate to the previous or next opened page
- Click **Refresh** to reload the page.
- Type a URL into the URL bar and press **Enter**.

Your administrator might limit which interactive elements you can use in **Write** mode.

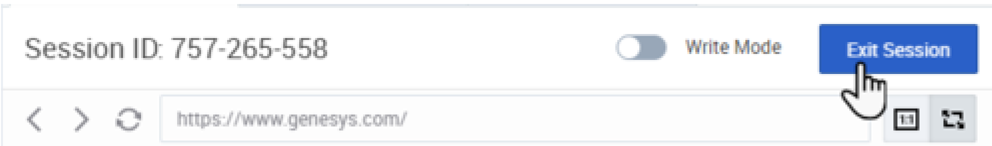
> **Tip**
> You can only co-browse while your contact is on your company's site. If the contact navigates to another site the co-browse session stops until they come back to your site.

To switch back to **Pointer** mode, click the mode toggle at the top right corner of the Co-browse tab.

Your contact can also switch back to **Pointer** mode at any time by clicking the **Write Mode** toggle switch.

Stop a Co-browse session

Once a Co-browse session starts, both you and your contact may end the session. You can click **Exit Session** at the top right corner of the **Co-browse** tab; your contact can click the **Globe** button in the Co-browse session toolbar.



Ending your ongoing chat or call with your contact also immediately ends the Co-browsing session.

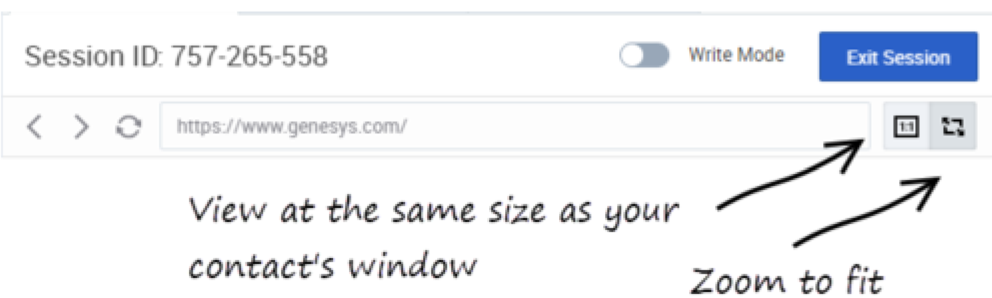
If your contact exits the session, you are notified and your browser no longer displays a view of the contact's browser. Likewise, if you exit the session, your contact receives a notification. Exiting the Co-browse session does not end your related chat or call with your contact.

Manage your virtual browser

The size of your virtual browser (a window on your computer that displays the contact's browser window) matches the actual size at the contact's end.

Scroll bars are displayed to help you navigate the contact's browser if their window is bigger than your Agent Desktop Co-browse area.

You can use the zoom-to-fit button to scale the display to fit in your window or the 1:1 button to return to the actual size that your contact sees.



Visibility of sensitive data

You administrator might limit which fields are readable to you.

Restricted buttons and controls have **green boxes** around them. If you hover your pointer over the element, an alert icon is displayed to remind you that the element cannot be clicked by you. Your contact can still interact with these elements.

> **Tip**
> By default, all **Submit** buttons are deactivated for you. If you click on a **Submit** button, nothing happens. The contacts always has permission to submit any web forms, just as they would while browsing normally.

Restricted text and data entry fields have **purple boxes** around them. If you hover your pointer over the element, an alert icon is displayed to remind you that the element cannot be clicked by you. Your contact can still interact with these elements.

Examples of restricted text and data fields are those that might contain credit card, personal identification, or password information.

If your contact enters information in a restricted text or data entry field, everything they enter is masked out by asterisks (****).

Images might also be masked from you. These display as a grayed out area surrounded with a **purple box**.

What next?

- Voice calls
- Chat
- Contacts
- Team Communicator
- Internal interactions

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

Altocloud Chat Interaction

Important

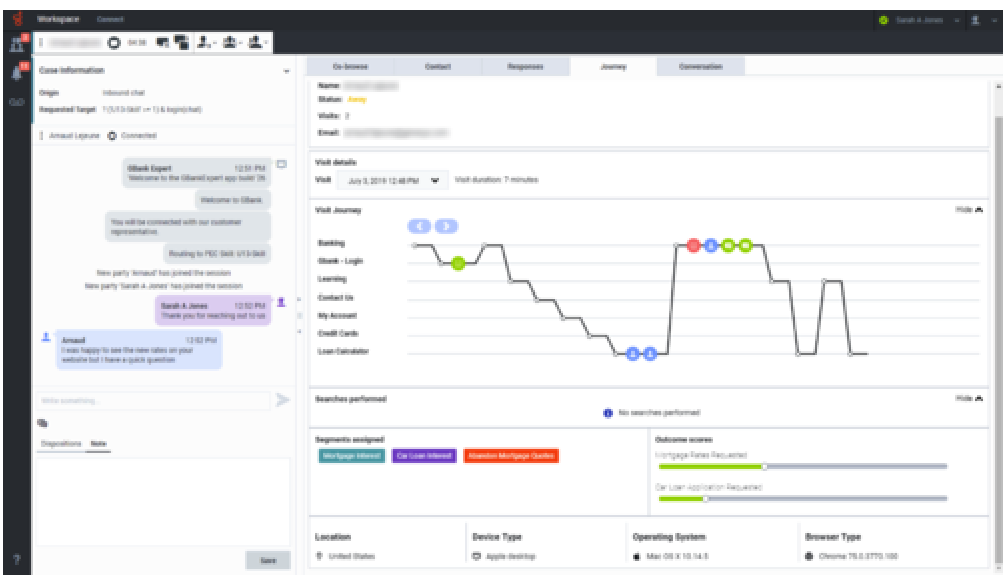
This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Altocloud Chat Interaction.

Genesys Altocloud displays a graphic representation of a contact's website journey, providing information and insight for sales and service agents.

Important

- Some Workspace Agent Desktop features are available only for Genesys Engage cloud users.
- Altocloud Journey might look different in your environment.

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



The **Journey** tab is displayed after a contact has been proactively offered a chat based on their web activity. Altocloud might have identified the contact as a potentially valuable customer or one who has become stuck somewhere on the website. This is determined by how your organization set up Altocloud Journey.

Use the **Journey** tab to view the details of a contact's visit to your company website before and after they initiated a web chat interaction.

The *Genesys Altocloud Agent's Guide* contains all the information that you, as an agent, need to understand and use the contents of the **Journey** tab.

Get Started

- Get started
- A visitor's experience
- About journey analytics in Genesys Engage (Agent Desktop)

Using the Journey tab

- Visitor details
- Visit details
- Customer journey map
- Segments assigned
- Outcome scores

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

What next?

- Asynchronous Chat
- Contacts
- Team Communicator
- Internal interactions
- Co-browse

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop

3. Calls
4. Contacts
5. Contact and interaction history

Contacts and interactions

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Contacts and interactions.

A contact is a person that your company does business with. Your company has information about that person that you can manage and use to do your job. An interaction is a communication with the contact over one or more channels, such as Voice or Digital, such as Chat or Email, and the tools that help you address the contact's needs and the needs of your company. Workspace Agent Desktop provides tools that you can use to manage previous interactions with a contact (the contact's interaction history, your History, and your company's interaction database).

Important

Due to continual changes to Agent Desktop, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you see in the product when you use it.

How do I search through previous interactions with customers?

You can view customer interactions in the Contact Directory and in the History tab of an active interaction.

You can view customer interactions in three ways:

- My History lets you browse your interactions.
- The Contact Directory lets you browse all interactions with a customer or team member.
- Interaction Search lets you browse the complete interaction database using either a Quick Search or an Advanced Search.

Contact management videos

The following videos introduce you to some of the basics of contact and interaction management, but be sure to click the links on this page to read about contact and interaction management in detail.

Managing Contacts

Link to video Link to video

Finding Interactions

How to find interactions in the Interaction Database:

- My History

Basic My History search

Link to video

Advanced My History search

Link to video

- Interaction Search

Basic Interaction history search

Link to video

Advanced interaction history search

Link to video

- Contact History

Basic Contact history search

Link to video

Advanced Contact history search

Link to video

What next?

- Calls
- Chat
- Email
- Contacts
- Contact and interaction history

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

The Contact Directory and contact management

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Contacts can be team members or customers. Information about contacts is stored in the Contact Directory. From the Contact Directory, you can call a contact, manage a contact's profile information (such as their name, phone number, email address), and review a contact's past interactions.

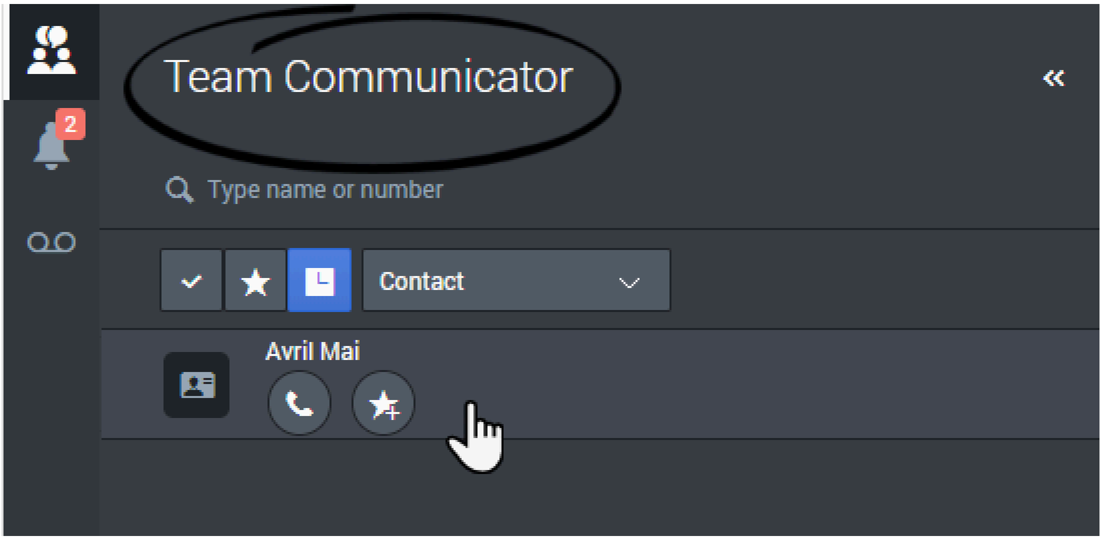
> **Important**
> Due to continual changes to Agent Desktop, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you see in the product when you use it.

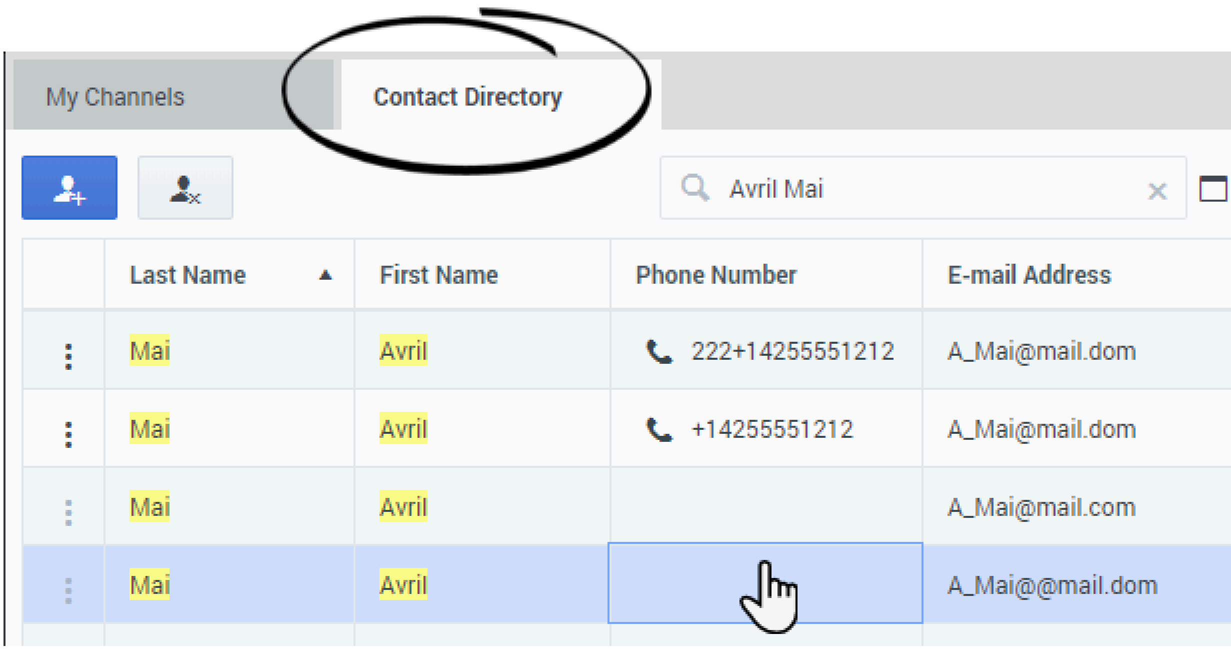
Managing Contacts

Use Workspace Agent Desktop to:

- Find contacts in your contact database.
- Call or email contacts in your contact database.
- Add and delete contacts.
- Edit contact information either while handing an interaction or in the contact database.
- Change the contact that is assigned to an interaction.
- Assign the correct contact to an interaction.

Where are my contacts?





Link to video

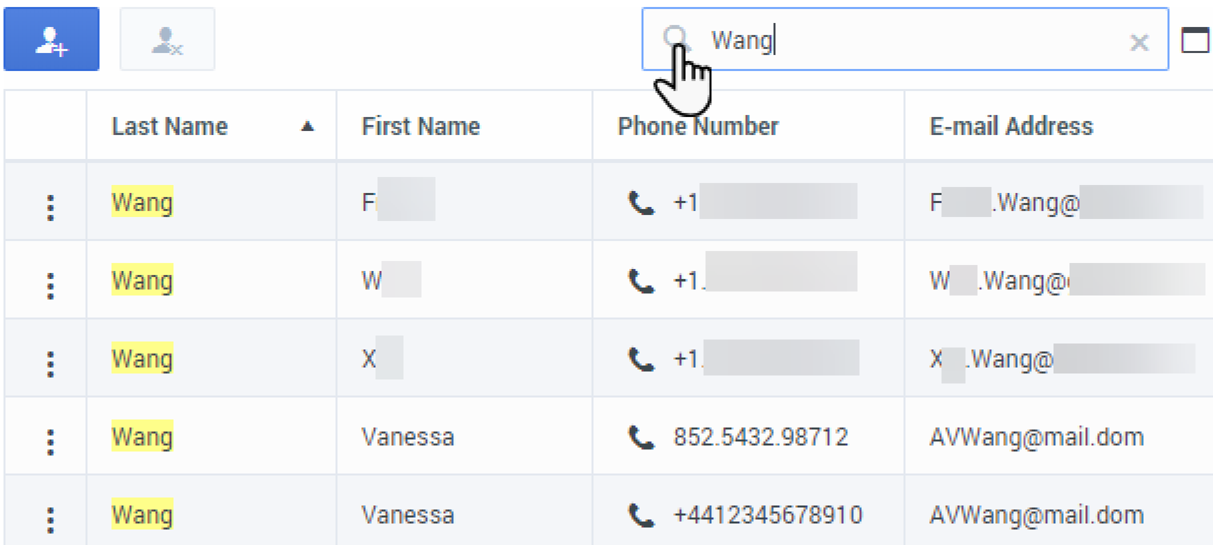
There are a few different ways that you can access your contacts:

- Use the Team Communicator to quickly contact a team member, or a favorite or recent contact. This tool is accessed by clicking the  button. Type a name or number, click Favorites or Recent, then click the contact to call them.
- Open the Contact Directory by selecting **Contact Directory** tab in your workspace. This contains all of your contacts, such as team members, customers, and any external contacts. Type the name, phone

number, or email address of the contact. Click the phone icon to call the contact.

Watch the video to see an overview of the Contact Directory.

How do I find a contact in the Contact Directory?



Link to video

The easiest way is to use the **Quick Search** option.

Start typing a name, phone number, or email address into the **Quick Search** field and the matching results are returned in the **Contact** grid.

The Quick Search searches each field of the contact database for the phrase that you specify and displays a list of records where at least one record field contained the search phrase. Workspace performs a search that considers each field of the contact database (name, phone number, email address, or other criteria) as a *phrase* (as opposed to a *tokenized* list of words) and uses the search criteria that you provide as a *phrase*, not as a list of words.

Examples:

- Quick search using the phrase "John Pa" as the criteria in a quick search defined to apply to only the First Name and Last Name fields will match a contact where:
  - First Name=John or Last Name=John

    and where:
  - First Name = Paul or Last Name = Paul
- Quick search using the phrase "John Daly" as the criteria in a quick search defined to apply to only the First Name and Last Name will not match a contact where:

- First Name=John and Last Name=Doe

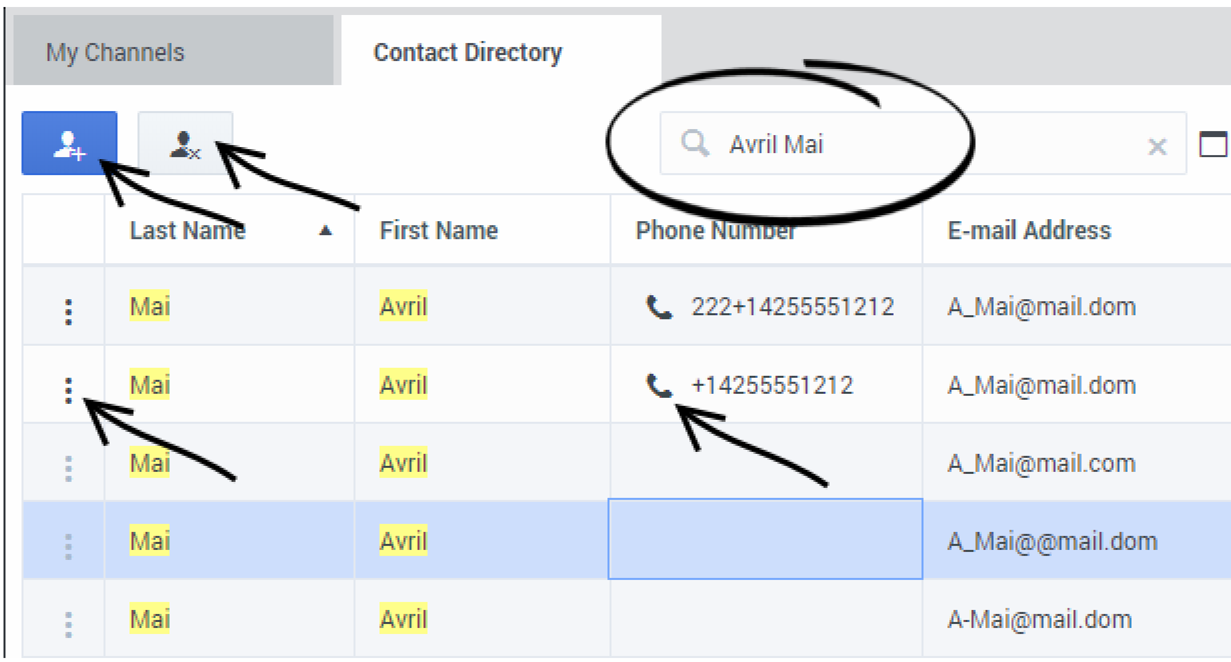
Results are returned in tabular form and sorted according to the default search field, such as **Last Name**.

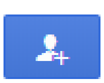
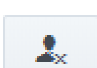
The Grid view can be used to help to refine your search by sorting the results.

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.

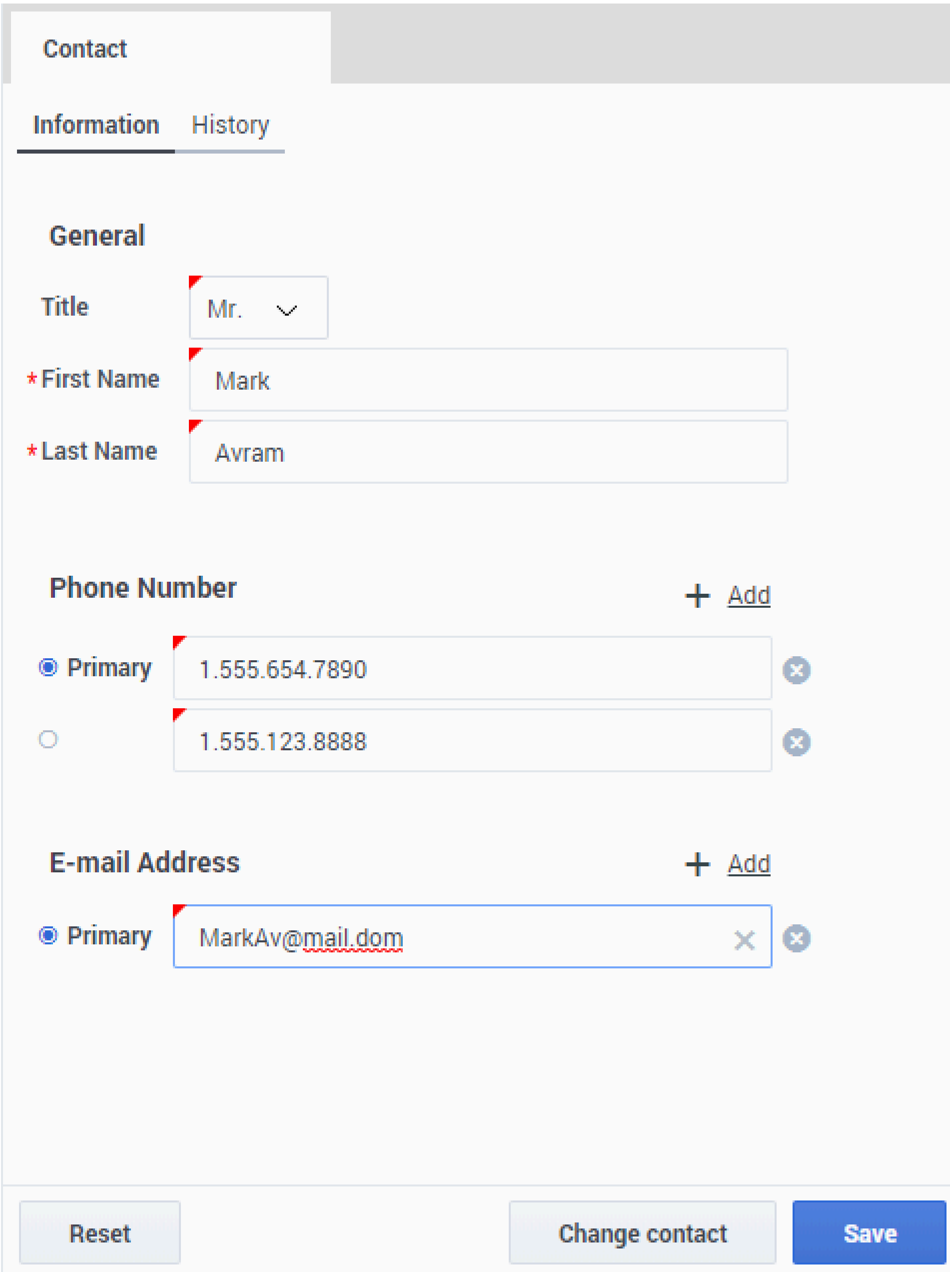
Watch the video to see how you can search the directory and customize the results.

What actions can I take with a contact?



- Call the contact by clicking the phone icon.
- View and manage the profile **Information** of the selected contact.
- View the **History** of interactions with the selected contact.
- Use  to add a new contact.
- Use  to delete the selected contact.
- Use **More Actions** ⋮ to perform other actions such as calling the contact (depends on your permissions).

How do I add a contact?



Your site might be set up to add new contacts automatically. But if you are working with a contact who is not in the Contacts Directory, you might be able to add them yourself.

From the Contact Directory, click to open the Contact Information view.

If you are handling an interaction, you can update the Contact Information view while the interaction is still active.

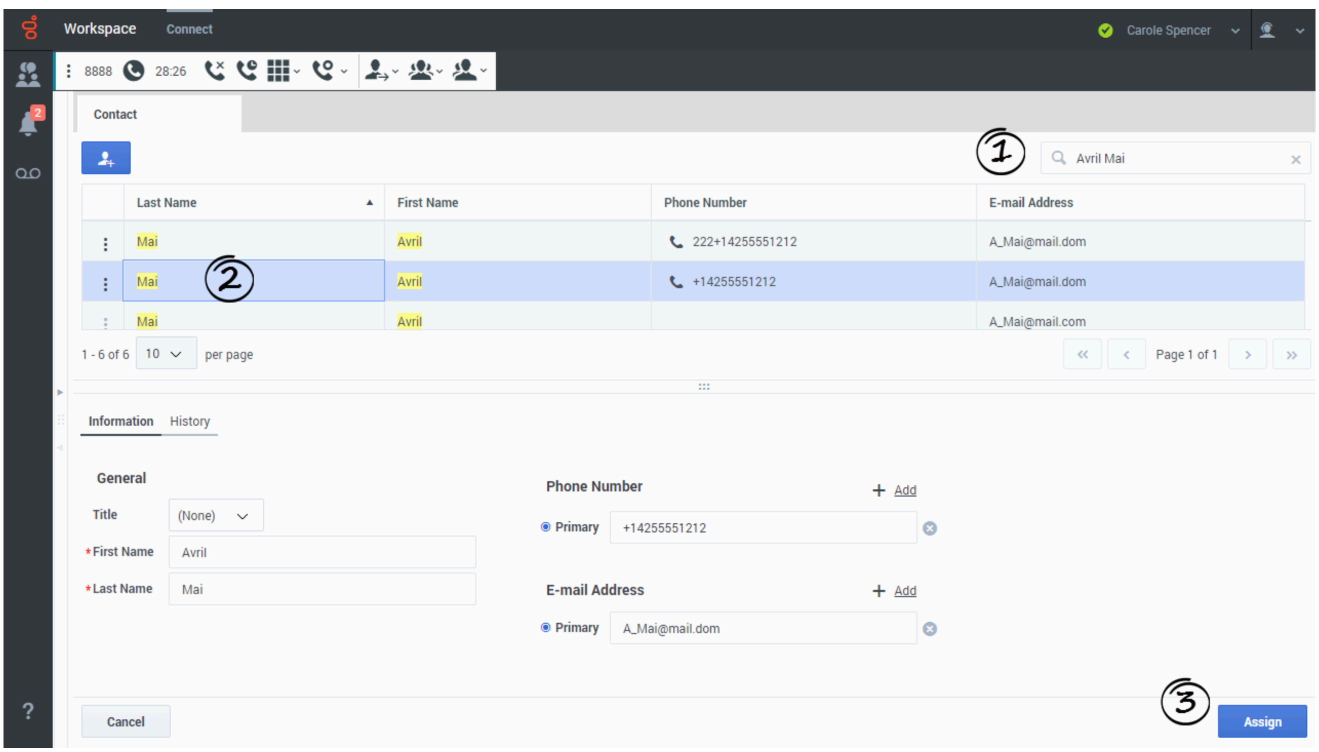
Add contact information to the fields in the view. Unsaved changed are highlighted by a red triangle. Click **Save** to commit your updates to the Contact database.

To clear unsaved changes, click **Reset**.

You can add multiple phone numbers and email addresses for a new (or existing) contact, and specify a phone number or email address as the *primary* contact number or address.

You can clear one or more fields by clicking

How do I change a contact?



Link to video

Sometimes the wrong contact is assigned to an interaction. Perhaps a known contact calls you from a phone that is not in the contact database causing a new contact to be created for a contact that already exists.

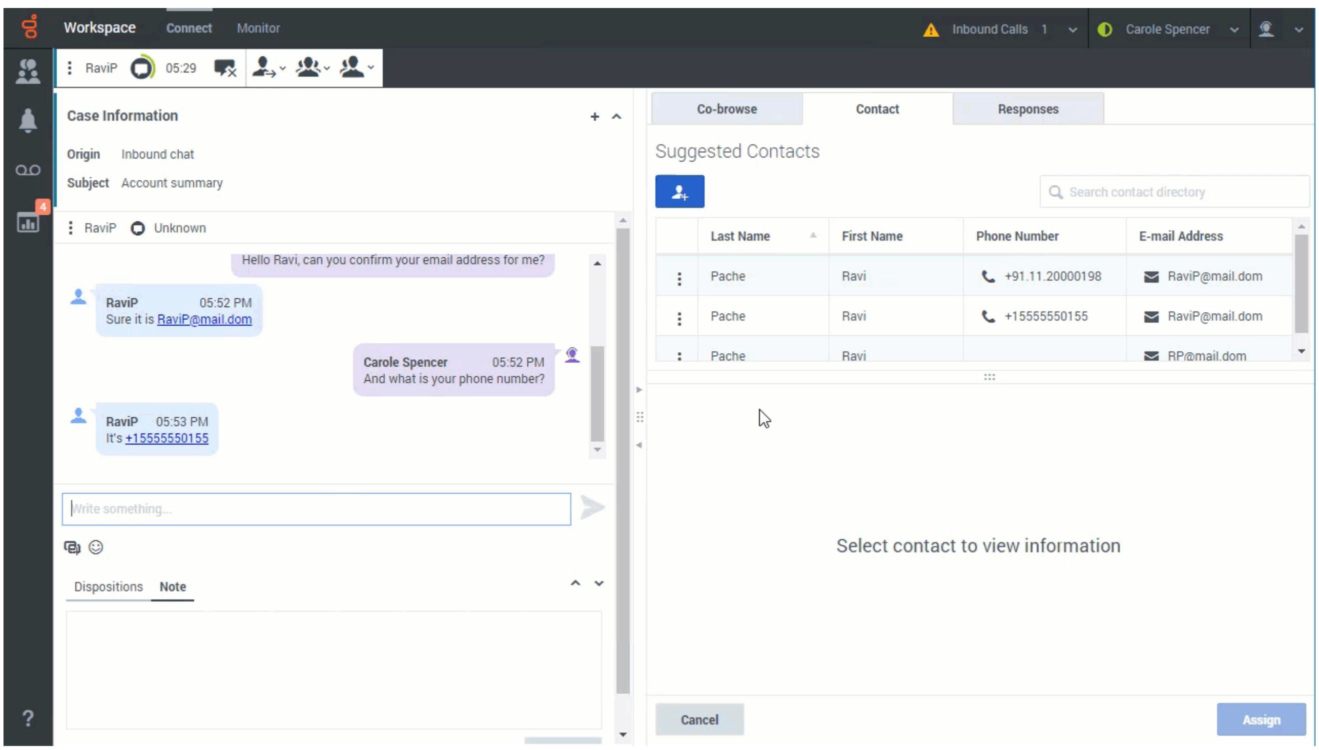
The Change Contact view enables you to assign a different contact for the current or selected interaction. To open this view, in the **Information** tab of the Contact view of the interaction, select **Change Contact**. The Contact Directory quick search is displayed.

Use the Quick Search to find the Contact to whom you want to assign the interaction.

1. Enter the name of the contact.
2. Select the contact in the results grid view.
3. Click **Assign**.

Sometimes, your account might be set up to enable you to choose which contact to assign the interaction to from a list of suggested contacts that Workspace Agent Desktop finds in the Contact database.

What if more than one contact is suggested for an interaction?



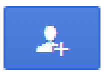
Sometimes more than one person might match the phone number of a call you are receiving, the email address of the email or chat you are handling, or the contact name of a chat or workitem. When this happens, Workspace Agent Desktop might not know which contact to assign the interaction to.

Sometimes, by default, the first contact Workspace Agent Desktop finds in the Contact database is assigned automatically. If the wrong contact is assigned your account might be set up to enable you to change the contact to the correct one.

Sometimes, your account might be set up to enable you to choose which contact to assign the interaction to from a list of suggested contacts that Workspace Agent Desktop finds in the Contact database.

When this happens, you will see a list of suggested contacts in the **Contact** tab of the interaction. (See the video. You can click the video to make it bigger).

In this view you can do the following:

- Select one of the contacts to view their Contact Information and Contact History.
- Select one of the contacts and click **Assign** to assign the selected contact to the interaction.
- Scroll through the list of suggested contacts.
- Search for a contact in the Contact Directory that is not in the list by typing a name, phone number, or email address in the **Search contact directory** field and assign the interaction to him or her. Clear the **Search contact directory** field and press **Return** or click the **Close** button in the search field to return to the Suggested Contacts view.
- Click **Add contact**  to create a new contact and assign the interaction to him or her.
- Click **Cancel** to close the list of suggested contacts. To assign a contact to the interaction, you must click **Change Contact** to reopen the list of suggested contacts.

What next?

- Contact and interaction history
- Calls
- Chat
- Email
- Navigating Agent Desktop

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

Interaction history views

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Interaction history views.

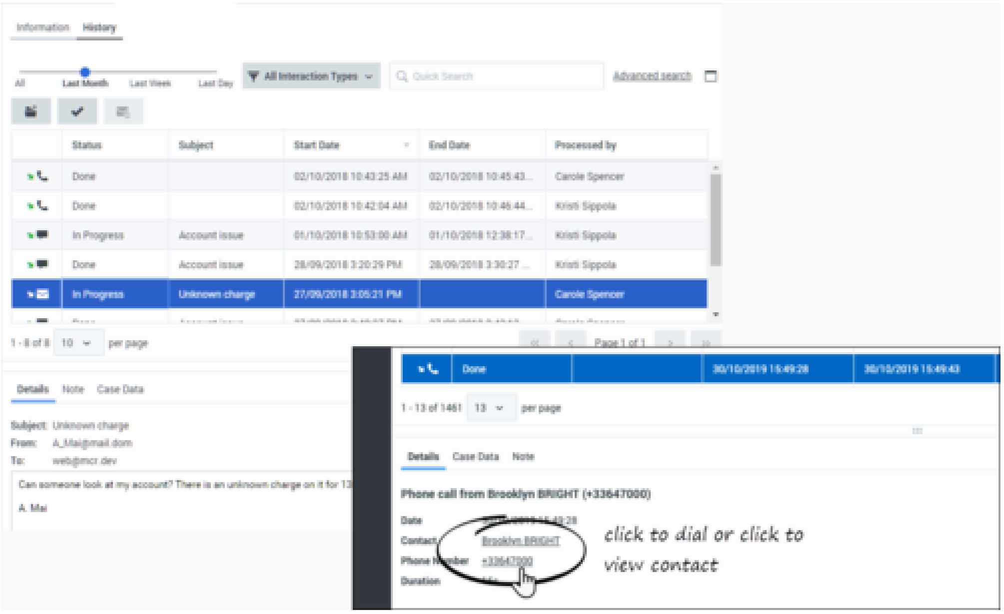
Workspace lets you look at the interactions that you and your coworkers have worked on in the past. You can view information about the interactions, including notes and case data. You can also open and process (forward or mark Done) some interactions.

Important

- Due to continual changes to Agent Desktop, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you see in the product when you use it.
- Some Workspace Agent Desktop features are available only for Genesys Engage cloud users.
- Some Workspace Agent Desktop features are available only for Genesys Engage on-premises users.

Contact and Interaction histories are available in many different views:

- My History: The interactions that you have handled.
- Contact History: Previous interactions with a contact you have selected from the Contact Directory or from the History view of the current voice, chat, email, or workitem interaction.
- Interaction Search: The Interaction Search view lets you search the entire interaction database for all media types, with all contacts, and handled by any agent.



Click an interaction in one of the History views to view more information in the **Details**, **Case Data**, and **Note** tabs.

- If your account is enabled to use the Click-to-Dial feature in the **Details** tab the contact's phone number will be displayed in underlined link text. Click the link to call the contact.
- If your account is enabled to use the Click-to-Search feature in the **Details** tab the contact's name will be displayed in underlined link text. Click the link to view the contact information in the Contact Directory.

Interaction types

The following are examples of some of the icons you might see in the different History views, depending on what channels you are permitted to use.

	Answered incoming call.
	Answered outgoing call.
	Unanswered outgoing call.
	Answered incoming chat.
	Incoming email.
	Outgoing email.
	Incoming workitem.
	Workitem.

How can I find the interactions I've worked on?

The My History view enables you to view and manage your previous interactions with a contact.

Click the **My History** tab to display the My History view in the main view.

The Chronology slider lets you see all of your interaction history, or just those from the last day, week, or month.

The My History view **Interaction Type** button enables you to refine your results by displaying only those interaction types that you select.

The Quick Search field enables you to enter keywords or a phrase to search for in the contact's interactions, such as the subject of an email or chat, the body of a chat transcript, a customer name, the name of the agent who handled the interaction, or other text that your administrator allows you to access.

Show video: My History: Quick Search

Link to video

The Advanced Search feature enables you to choose conditions to search only within the limits that you define.

Show video: My History: Advanced Search

Link to video

When you find the voice, chat, email, or workitem interaction you are searching for, select it to view the details and other information.

You can open some interactions for editing or handling. Just select it and click .

You can Mark Done in-progress interactions such as an email or a workitem. Just select it and click .

You can open email interactions and forward them inline to an external resource. Just select it and click .

Your account might be enabled for printing email interactions. Just select it and click .

Use the **Show Details Panel**/**Hide Details Panel** button () to change the display of the Details panel.

What if the contact information is anonymous?

In some call centers, voice interactions are anonymous to protect contact Personally Identifiable

Information (PII). If you do not assign a contact to an anonymous call, the call is not stored in the contact database and so is not available in any History view. In some contact centers, a routing strategy is used to assign a contact ID to an anonymous contact. In this case the call is available in the **My History** view; however, if you select a call from an anonymous caller, the contact name and phone number are displayed as **Anonymous** in the **Details** tab. You cannot call an anonymous contact.

How do I explore the history of a contact?

The Contact History view lets you see and manage previous interactions with a contact you have selected from the Contact Directory or from the History view of the current voice, chat, email, or workitem interaction.

Link to video

Use the Contact History view to do the following:

- Find interactions for the current contact or the currently selected contact.
- View information about the selected interaction.
- Manage the selected interaction,

The Chronology slider lets you see all of the contact's interaction history, or just those from the last day, week, or month.

The Contact History view **Interaction Type** button enables you to refine your results by displaying only those interaction types that you select.

The Quick Search field enables you to enter keywords or a phrase to search for in the contact's interactions, such as the subject of an email or chat, the body of a chat transcript, a customer name, the name of the agent who handled the interaction, or other text that your administrator allows you to access.

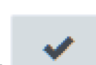
Link to video

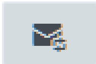
The Advanced Search feature enables you to choose conditions to search only within the limits that you define.

Link to video

When you find the voice, chat, email, or workitem interaction you are searching for, select it to view the details and other information.

You can open some interactions for editing or handling. Just select it and click .

You can Mark Done in-progress interactions such as an email. Just select it and click .

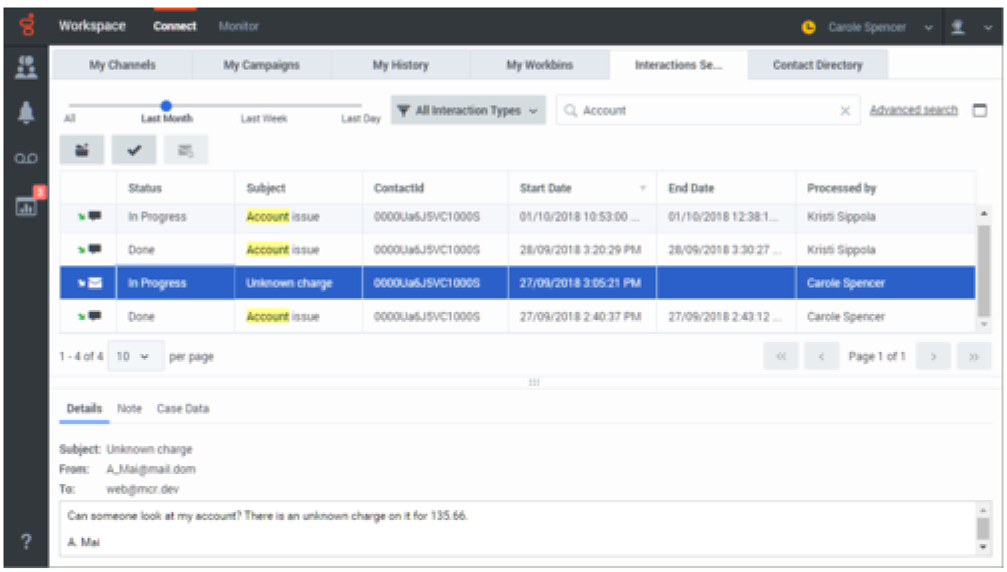
You can open email interactions and forward them inline to an external resource. Just select it and click .

Your account might be enabled for printing email interactions. Just select it and click .

Use the **Show Details Panel/Hide Details Panel** button (☐) to change the display of the Details panel.

How do I find any interaction?

Sometimes you need to find an interaction that someone else at your contact center worked on, or maybe you worked on it, but you can't remember who the contact was or when you worked on it. You might be a team lead or supervisor who is looking for interactions related to a specific topic or was processed by a specific agent or agents.



The Interaction Search view lets you search the entire interaction database for all media types, with all contacts, and handled by any agent.

Click the Interaction Search tab to display the Interaction Search view in the main view.

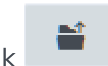
The Chronology slider lets you see all of your interaction history, or just those from the last day, week, or month.

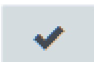
The Interaction Search view **Interaction Type** button enables you to refine your results by displaying only those interaction types that you select.

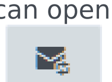
The Quick Search field enables you to enter keywords or a phrase to search for in the contact's interactions, such as the subject of an email or chat, the body of a chat transcript, a customer name, the name of the agent who handled the interaction, or other text that your administrator allows you to access.

The Advanced Search feature enables you to choose conditions to search only within the limits that you define.

When you find the voice or Digital, such as chat, email, or workitem, interaction you are searching for, select it to view the details and other information.

You can open some interactions for editing or handling. Just select it and click .

You can Mark Done in-progress interactions such as an email or workitem. Just select it and click .

You can open email interactions and forward them inline to an external resource. Just select it and click .

Your account might be enabled for printing email interactions. Just select it and click .

Use the **Show Details Panel**/**Hide Details Panel** button () to change the display of the Details panel.

Using Quick Search

The Quick Search field lets you to enter keywords or a phrase to search for in the interaction database, such as the subject of an email or chat, the body of a chat transcript, a customer name, the name of the agent who handled the interaction, or other text that your administrator allows you to access.

Link to video

Searches of customer information like name and address, and of interaction information like subject or body text are 'starts-with' searches, meaning that each of the fields that you are allowed to search for words or strings, are searched for words that start with the keywords that you enter in the Quick Search field.

Searches of information that has been customized by your administrator are 'equals' searches, meaning that the search looks for exact matches with what you enter. Ask your administrator about custom information.

Text search is:

- Not case sensitive. TEXT, Text, text, and teXt are all treated as the same word.
- Searchable as either a group of individual words or as sentences.
  - Put a group of words in double quotes to search for a specific sentence. Searching for `"Find me"`

returns all interactions that contain the exact match for the phrase 'Find me'.

- Otherwise, each word is treated as a separate search condition. Searching for `Find me` returns all interactions that contain one word that starts with `Find` *and* one word that starts with `me`.

Use the **Interaction Type** menu to see only interactions of a certain type, like voice, email, or chat. Perhaps that interaction you are looking for was handled through a chat. To see only chat interactions, select **Show chat interactions** from this menu.

When you find the interaction you are searching for, select it to view the details and other information in the Details, Notes, and Case Data tabs.

Use the **Show Details Panel/'Hide Details Panel** button () to change the display of the Details panel.

Using Advanced Search

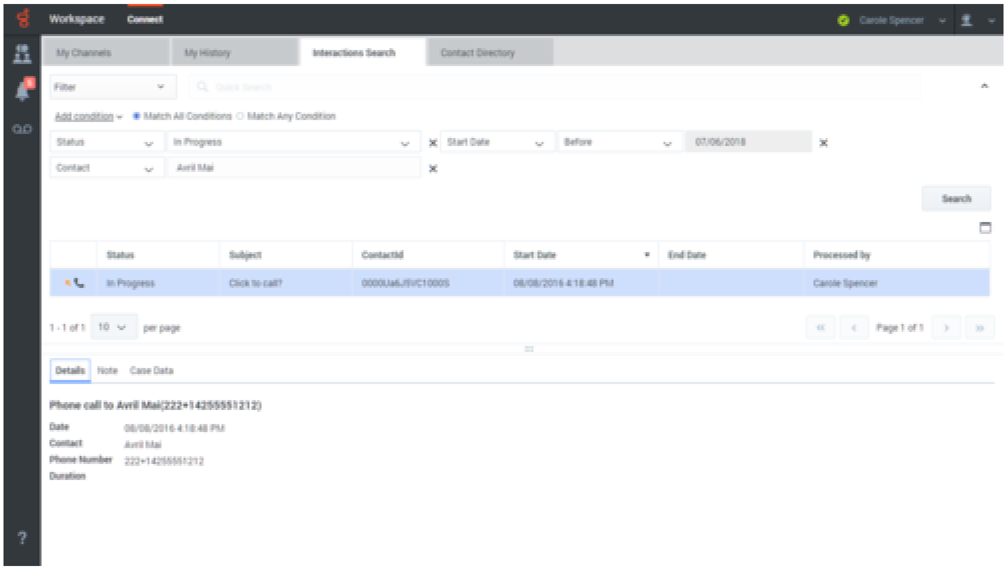
The Interaction Search *Advanced Search* feature lets you choose a set of conditions that you want to use to limit the search to only those interactions in the interaction database that match the conditions you specify.

Link to video

Click next to the Quick Search field to open the Advanced Search view.

> ### Tip
>
> Your administrator decides what conditions you are allowed to search on, so your Interaction Search view might not exactly match the screen shots and video.
> For the **Add Condition** menu, your administrator might have set up groups of conditions which appear as submenus. This makes it easier for you to find the condition you want to use.

This is what the Advanced Search view looks like:



Use the controls described here to set up your search, then click **Search** to find the interactions that match the conditions that you specify.

When you find the interaction you are searching for, select it to view the details and other information.

Interaction Type

Use the **Interaction Type** menu to see only interactions of a certain type, like voice, email, or chat. Perhaps that interaction you are looking for was handled through a chat. To see only chat interactions, select **Show chat interactions** from this menu.

Add Condition

Use the **Add Condition** menu to add search criteria to the Advanced Search view. When you make a selection from this menu a new condition entry is added above the **Search** button. Add as many conditions as you need. The view will scroll if necessary.

To remove a condition, click the X next to the entry.

Each condition entry that you add lets you refine your search. For example, you might limit your search to interactions that have a status of "In Progress". You might know approximately when the interaction was handled. the **Start Date** and **End Date** conditions let you limit the search to interaction handled before, on, between, or after a certain date.

For some conditions, you might have to enter text instead of selecting criteria from a menu or picking a date.

Text search is:

- Not case sensitive. TEXT, Text, text, and teXt are all treated as the same word.
- Searchable as either a group of individual words or as sentences.

- Put a group of words in double quotes to search for a specific sentence. Searching for `"Find me"` returns all interactions that contain the exact match for the phrase 'Find me'.
- Otherwise, each word is treated as a separate search condition. Searching for `Find me` returns all interactions that contain one word that starts with `Find` *and* one word that starts with `me`.

For some conditions, you might have to search the contact database or search for someone in your contact center, such as other agents who processed the interaction you are looking for. For searches of contacts and internal targets, the Team Communicator opens when you click in fields such as **Processed By**.

Match All/Any Conditions

Use the **Match All Conditions** option to limit the search to only those interactions that meet *All* of the conditions that you specify.

Use the **Match Any Conditions** option to find the interactions that meet *at least one* of the search conditions that you specify.

Viewing Search Results

The search results are displayed in the interactions search results grid view. The search result table is sortable. To sort the interactions table, click a column head.

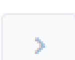
Important

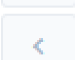
Workspace returns a maximum of 100 interactions. If you do not find the interaction you are searching for, you might have to refine your search criteria further.

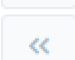
Navigating the Search Results Table

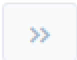
After you click the magnifying glass in the Quick Search field, Workspace looks through the interaction database to find interactions that meet the conditions that you specified.

All the interactions that are found are displayed for you in the Search Results table. The table displays results in pages if many interactions are found. If multiple pages are returned in the search results, page through the list of search results by doing any of the following:

 = Go to the Next Page

 = Go to the Previous Page

 = Go to First Page

 = Go to Last Page

Specify the number of items that are displayed on each page by using the **per page** drop-down list.

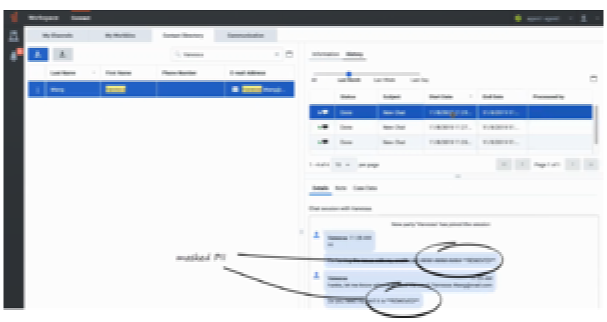
Details, Notes, and Case Data

The **Details**, **Note**, and **Case Data** tabs display information for any interaction that you select in the Search Results table.

- **Details**: 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.
- **Note**: enables you to view notes written by the agents who handled the interaction.
- **Case Data**: enables you to view the Case Data/case information and other attached data for the selected interaction.

Why are some numbers masked out?

Occasionally, a contact will enter their credit card number, personal email address, or other Personally Identifiable Information (PII) into the chat. This is a potential security risk for the contact. In some environments, Workspace Agent Desktop detects and masks PII to keep contact information private. This figure shows you some of the ways that PII is masked in the chat transcript in the History.



Click to enlarge

What next?

- Contacts
- Calls
- Chat
- Email
- Workitems/Open Media
- Navigating Agent Desktop

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

Workbins

Important

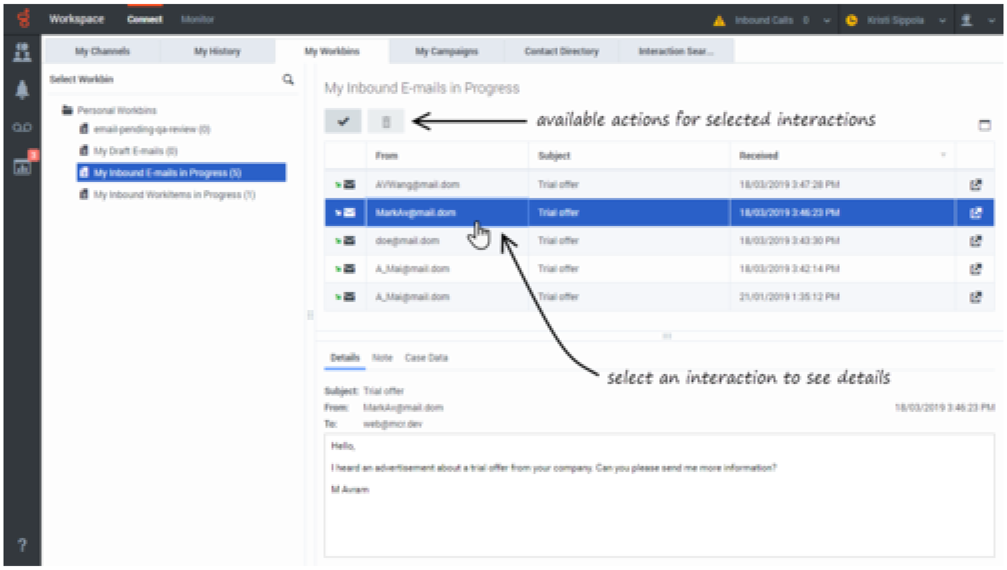
This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Workbins.

A workbin is like a personal queue or storage area where you can store email and workitem interactions to be handled later. You can access all of your workbins from the **My Workbins** tab in the **Connect** area. Supervisors might also see team workbins and Interaction Queues in this tab.

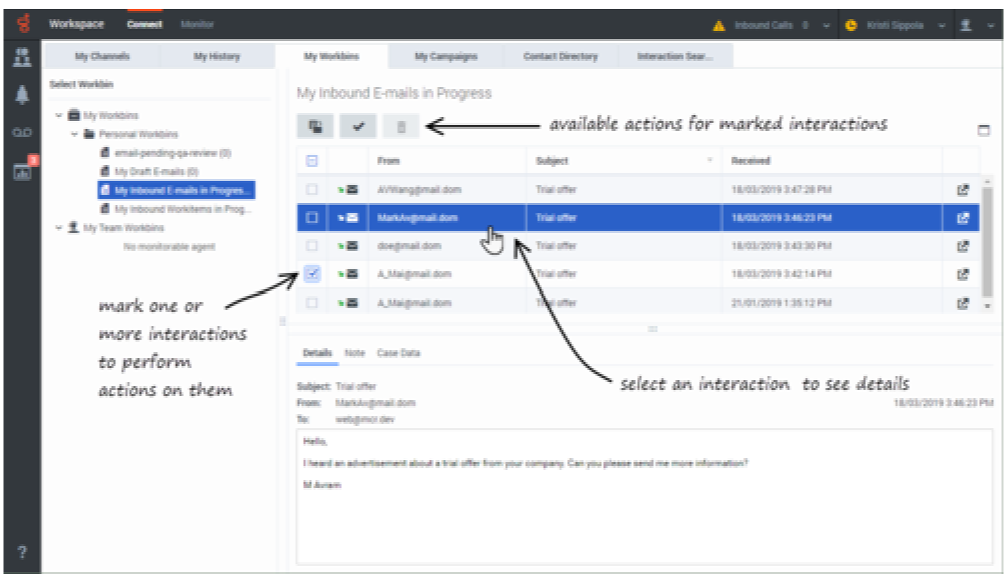
Important

- Some Workspace Agent Desktop features are available only for Genesys Engage cloud users.
- Some Workspace Agent Desktop features are available only for Genesys Engage on-premises users.

Agents typically see only their own workbins and can view and manage only those interactions that are in their own workbins:



Team Leads and supervisors might be set up to view and manage the workbins of the agents they supervise as well as interaction queues:



How do I use the My Workbins view?

Link to video

To view another workbin, select it from the tree in the Workbin explorer on the left-hand side of the view. The number of unopened interactions in each workbin folder is indicated next to the name of the workbin folder.

The list of available workbins depends on how your system is set up by your administrator. Some of the workbins which might be configured for you include:

- **My Draft E-mails** contains pending outbound email interactions that you've saved by clicking **Save in My Draft E-mails Workbin**. Other email interactions might have been moved here by your supervisor.
- **My Inbound E-mails in Progress** contains unprocessed inbound email interactions that you've saved by clicking **Save In My Inbound E-mails in Progress Workbin** ( ). Other email interactions might have been moved here by your supervisor.
- **My Inbound Workitems in Progress** contains unprocessed inbound workitems (workitems, faxes, pdf, or other Open Media types).

To view details, notes, and case data about an interaction that is stored in one of your workbins, select it. Information about the selected interaction is displayed in the tabs at the bottom of the Workbins view. To display the interaction information tabs, click the **Show/Hide Details Panel** button. ( )

To open an interaction for editing or handling click or double-click the interaction.

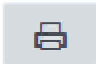
Workbin action controls are displayed at the top of the Workbin view. If your account is not set up for managing multiple interactions, just click an interaction to select it and the available action buttons become active.

If your account is set up for managing multiple interactions, you will see check boxes next to each interaction. Mark interactions for actions by clicking the check box next to them. There are different ways to mark multiple interactions:

- You can click the check box next to each one that you want to mark
- You can click one, then shift+click another to mark both plus all the interactions in between
- You can click the **Mark All** box at the top of the table to mark all interactions (click it again to unmark all)

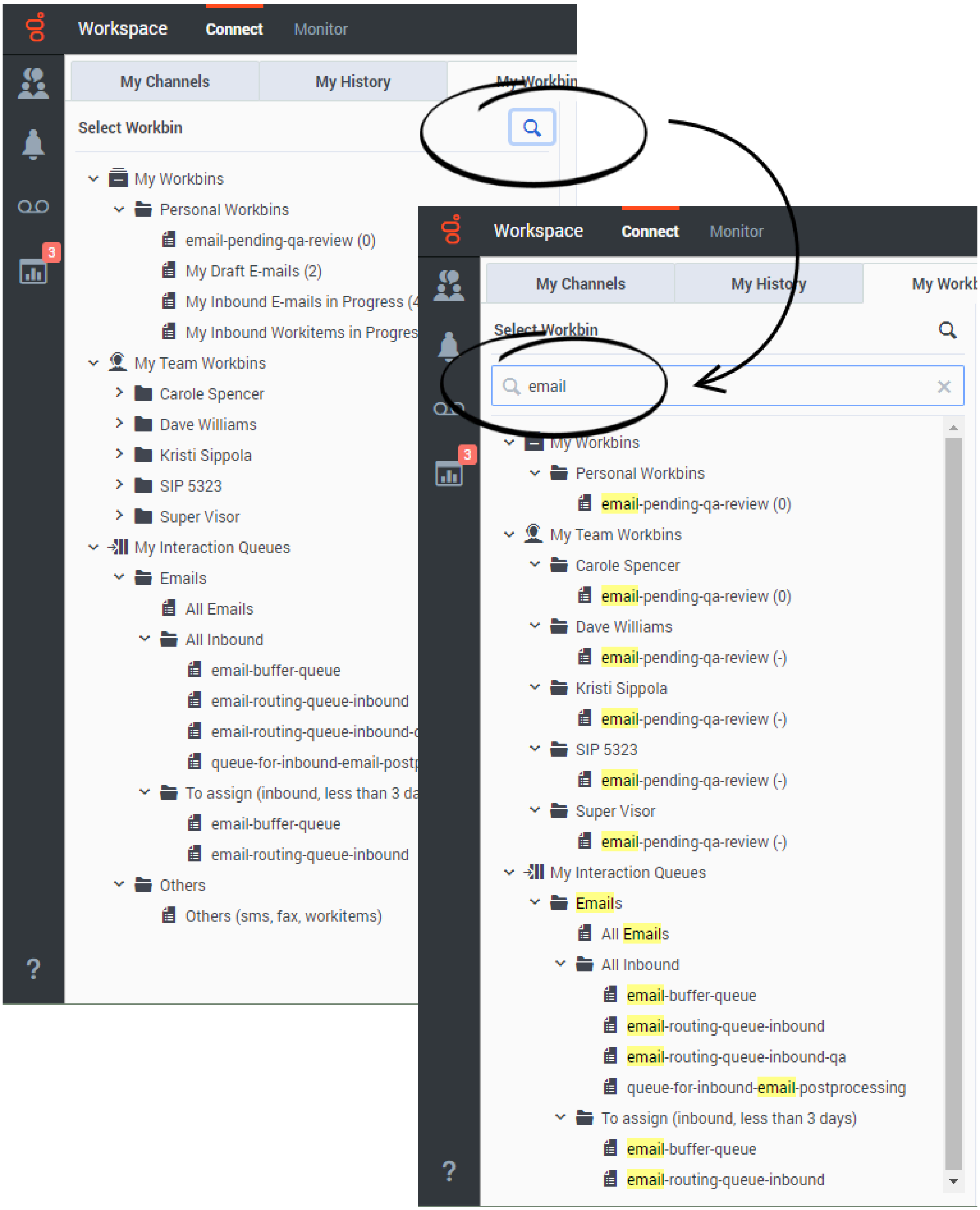
The following actions might be available to you, depending on how your system is set up by your administrator or what interaction type you have selected or marked:

- **Done**
- **Delete**
- **Move to Queue**
- **Move to Workbin**
- **Edit Case Information** Opens the Edit Case Information window to enable you to edit the content of the **Case Data** tab for the marked interaction(s).

- **Print**  If you are allowed to print from the Workbin views, the print button becomes active when you select a single email interaction (printing multiple email interactions at the same time is not possible).

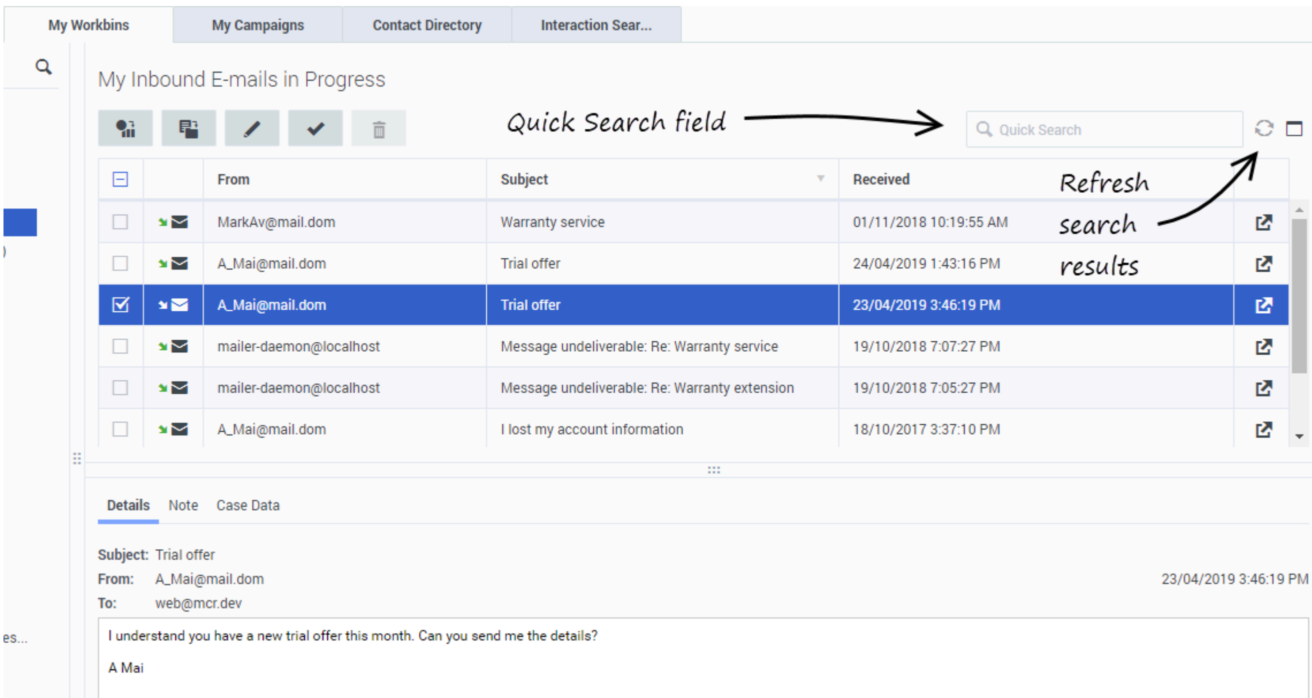
The video shows you how to use your Workbins.

How do I find a specific Workbin or Interaction Queue?


Workspace
Connect
Monitor
My Channels
My History
My Workbin
Select Workbin
My Workbins
Personal Workbins
email-pending-qa-review (0)
My Draft E-mails (2)
My Inbound E-mails in Progress (4
My Inbound Workitems in Progres
My Team Workbins
Carole Spencer
Dave Williams
Kristi Sippola
SIP 5323
Super Visor
My Interaction Queues
Emails
All Emails
All Inbound
email-buffer-queue
email-routing-queue-inbound
email-routing-queue-inbound-c
queue-for-inbound-email-postp
To assign (inbound, less than 3 da
email-buffer-queue
email-routing-queue-inbound
Others
Others (sms, fax, workitems)
Workspace
Connect
Monitor
My Channels
My History
My Workb
Select Workbin
email
My Workbins
Personal Workbins
email-pending-qa-review (0)
My Team Workbins
Carole Spencer
email-pending-qa-review (0)
Dave Williams
email-pending-qa-review (-)
Kristi Sippola
email-pending-qa-review (-)
SIP 5323
email-pending-qa-review (-)
Super Visor
email-pending-qa-review (-)
My Interaction Queues
Emails
All Emails
All Inbound
email-buffer-queue
email-routing-queue-inbound
email-routing-queue-inbound-qa
queue-for-inbound-email-postprocessing
To assign (inbound, less than 3 days)
email-buffer-queue
email-routing-queue-inbound

You might have many workbins (if you are a supervisor you might also have interaction queues) in the **My Workbins** tab tree view. To quickly find one or more by name, click the magnifying glass icon at the top of the tree to open the Search field. Enter the name or partial name of the workbin that you are looking for and the tree view is filtered to show only those workbins (and interaction queues) whose names contain the text that you entered.

How do I search for an interaction in a Workbin or Interaction Queue?



Link to video

When your workbin or interaction queue contains many interactions, it might be difficult to find a specific interaction. If your account is enabled for search, you will see the Quick Search field and Refresh Results icon.

The **Quick Search** field enables you to enter keywords or a phrase to search for in your workbins or interaction queues, such as the subject of an email or chat, the body of a chat transcript, a customer name, the name of the agent who handled the interaction, or other text that your administrator allows you to access.

Cloud Agent Desktop users have search enabled automatically; the only field you can search is **Subject**. On-Premises Workspace users might have other fields available for searching; these fields are enabled by your administrator; if you are not sure what fields you can search, ask your supervisor or administrator.

When you find the chat, email, or workitem, interaction you are searching for, select it to view the details and other information.

To open an interaction for editing or handling click or double-click the interaction.

The following actions might be available to you, depending on how your system is set up by your administrator or what interaction type you have selected or marked:

- **Done**
- **Delete**
- **Move to Queue**
- **Move to Workbin**
- **Edit Case Information** Opens the Edit Case Information window to enable you to edit the content of the **Case Data** tab for the marked interaction(s).
- **Print** If you are allowed to print from the Workbin views, the print button becomes active when you select a single email interaction (printing multiple email interactions at the same time is not possible).

Use the **Show Details Panel/Hide Details Panel** button () to change the display of the Details panel.

Searches of customer information like name and address, and of interaction information like subject or body text are 'contains' searches, meaning that each of the fields that you are allowed to search for words or strings, are searched for words that contain the keyword or phrase that you enter in the Quick Search field.

Searches of information that has been customized by your administrator are 'equals' searches, meaning that the search looks for exact matches with what you enter. Ask your administrator about custom information.

Text search is:

- Not case sensitive. TEXT, Text, text, and teXt are all treated as the same word.
- Searchable as a phrase: Searching for `Find me` returns all interactions that contain the exact match for the phrase 'Find me'.

What next?

- Email
- Workitems
- Supervisor tasks

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

Internal interactions

Important

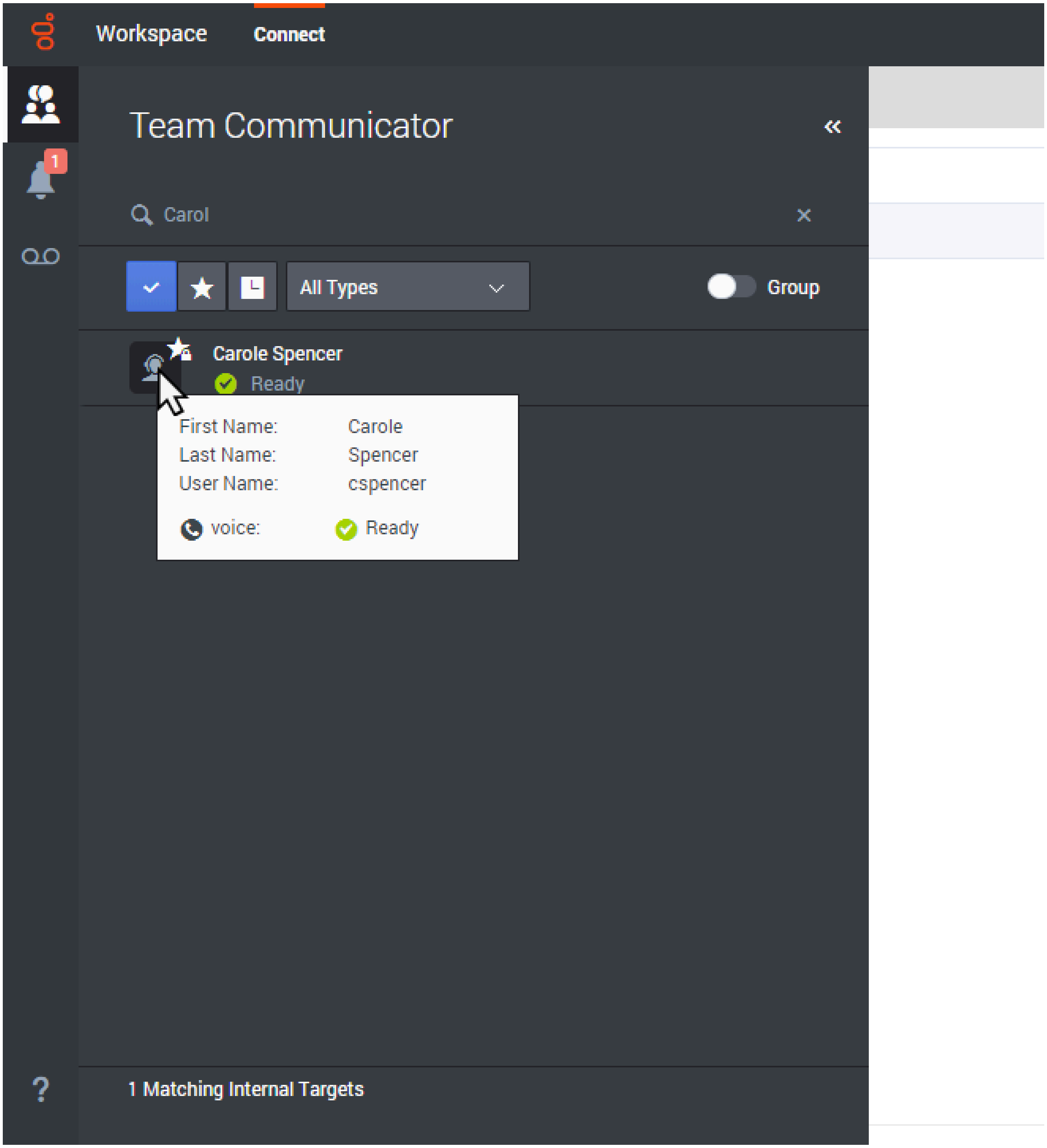
This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Internal interactions.

Internal interactions are communications between you and other people inside your company, such as call and chat consultations, call, chat, and email transfers, and also messages to you from your system or administrators. Internal interactions also include call and chat conferences that involve you, another internal party, and a contact.

Important

Due to continual changes to Agent Desktop, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you see in the product when you use it.

How do I contact people in my company?



The Team Communicator tool lets you search through your company directory for an agent, team lead, agent group, or other targets that you want to call, consult with, or transfer to.

Type in the name of the person that you want to call, then hover your mouse pointer over their name in the list of search results. A pop-up is displayed that lets you know whether that person is ready to take a call, is on a break, is busy, or is logged off.

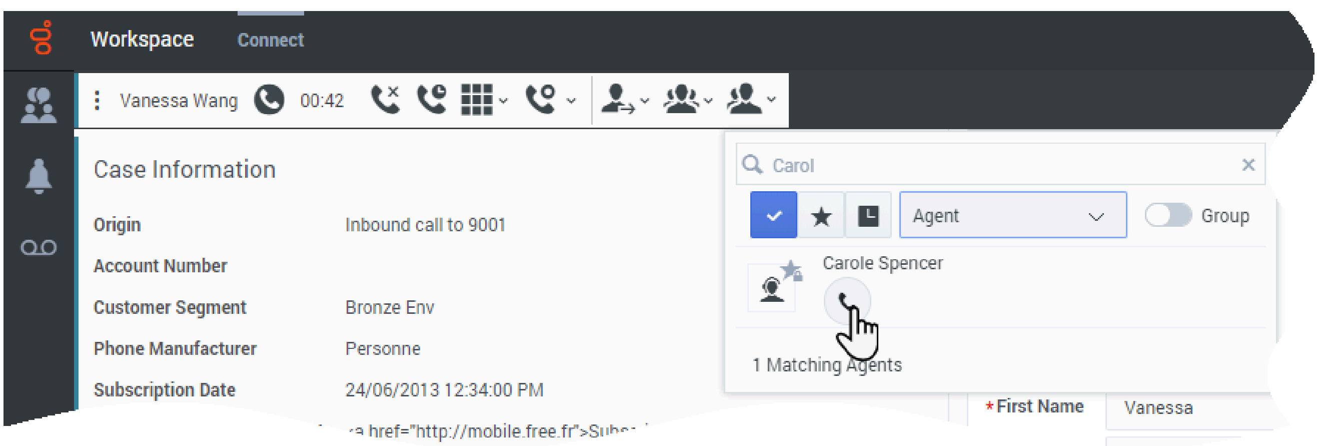
If the person is available, use the action menu to call them. If not, try a different channel or try again later.

Note: The video might show some features that are not yet available in this release of Agent Desktop.

What's the difference between a consultation and a conference?

Both activities involve getting help from an agent or supervisor. Consultations let you communicate with a team member privately while handling an interaction. Conferences let someone else from your contact center join the chat or phone call with your contact. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

How do I start a consultation?



Link to video

A consultation lets you discuss an active call with another team member. It's different from a conference because the customer is not connected to the session. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

 starts a consultation.

Search your list of team members to find the person or internal target (an agent group, a routing point, or a skill) you want to consult with and select the type of consultation you want. Once connected, you can monitor the status and use the controls as you would for any other interaction.

Some things to keep in mind:

- Either party can end the consultation, but ending the consultation does not end your interaction with the customer.
- If you end the session with the customer, the consultation remains active.
- Consultations are private — the customer can't see or hear your discussions.
- The team member can see the case and contact information.

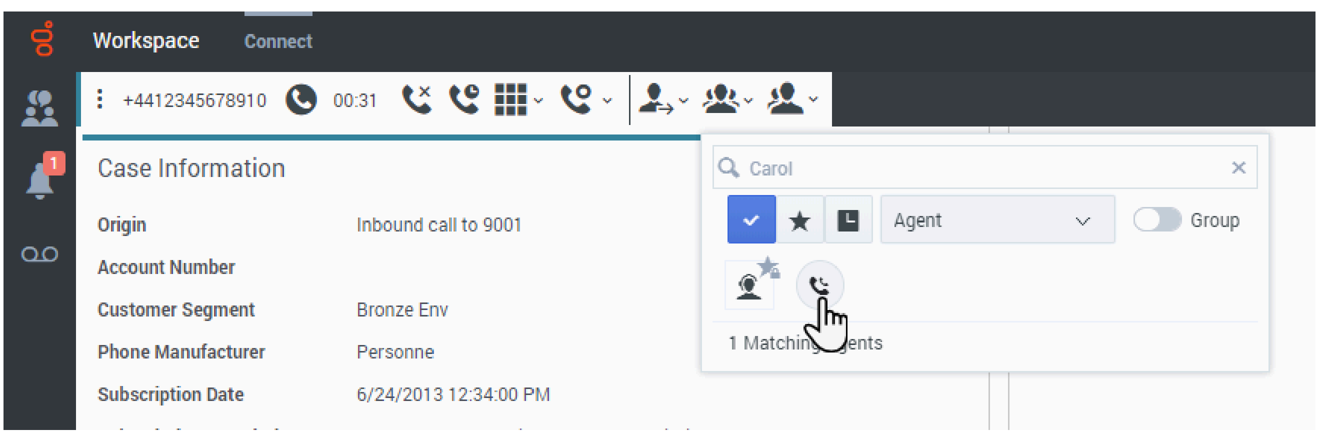
If you are on a call and start a voice consultation, the original call is put on hold while you consult with your selected team member.

-  resumes the original call (and also allows you to toggle between the two calls).
-  ends the consultation and resumes the original call from hold.

Prior to a conference or transfer, you can consult with your team member by selecting **Consult** in the toolbar. After the consultation request is sent, the initial call is put on hold.

While in a consultation, you can also complete a conference or transfer between your team member and your customer. To do this, select **Instant Call Transfer** () or **Instant Call Conference** (), and select the same button beside the desired team member's name.

How do I start a conference?



Link to video

Starting a conference allows you to add another person to your current call. It's different from a consultation because the customer is also connected to the session.

 starts a conference when working in voice.

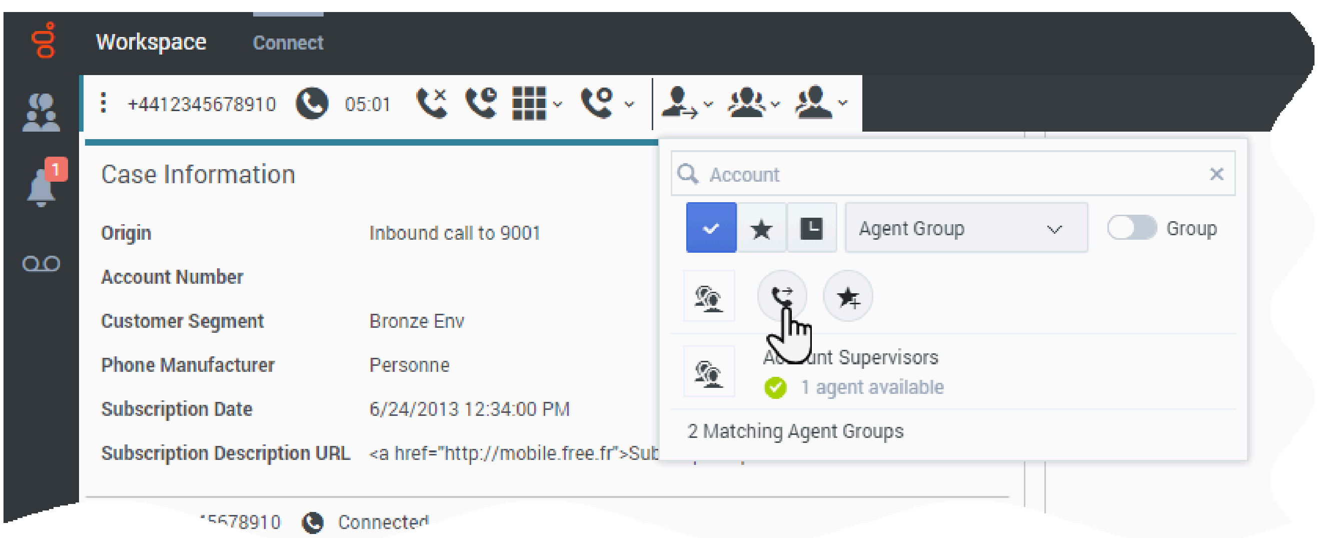
Search your list of internal targets to find the person, agent group, routing point, interaction queue, or skill that you want to add and then select the conference channel you are requesting. The conference begins as soon as they accept the request. (When sending a conference request to an agent group, the agent availability information might be 10 to 30 seconds behind, so you might have to wait to see if an agent is available to join the conference.)

Some things to keep in mind:

- You can always consult with a team member before adding them to a conference.
- In a voice conference, the person you added can choose to release the call. This disconnects them from the conference, but your call with the customer continues.
- If you disconnect from the call but the person you added to the conference is still connected, the call continues without you. Your system might be set up to end the conference after you disconnect if the person that you added is not part of your company.
- Everyone connected to the conference can see or hear what the other parties are discussing, unless you remove or selectively mute a participant.
- Your account might be configured to remove a party from a conference. Select the **Party Action** menu on the Voice Interaction view and select **Drop from conference** to remove that party from the conference.

A team member can select **Leave** to drop from the conference.

How do I transfer an interaction to another team member?



Link to video

You can transfer a call to another team member instantly, or you can consult with them first. For example, you could put the current call on hold while you talk to another team member to see if they will accept the transfer.

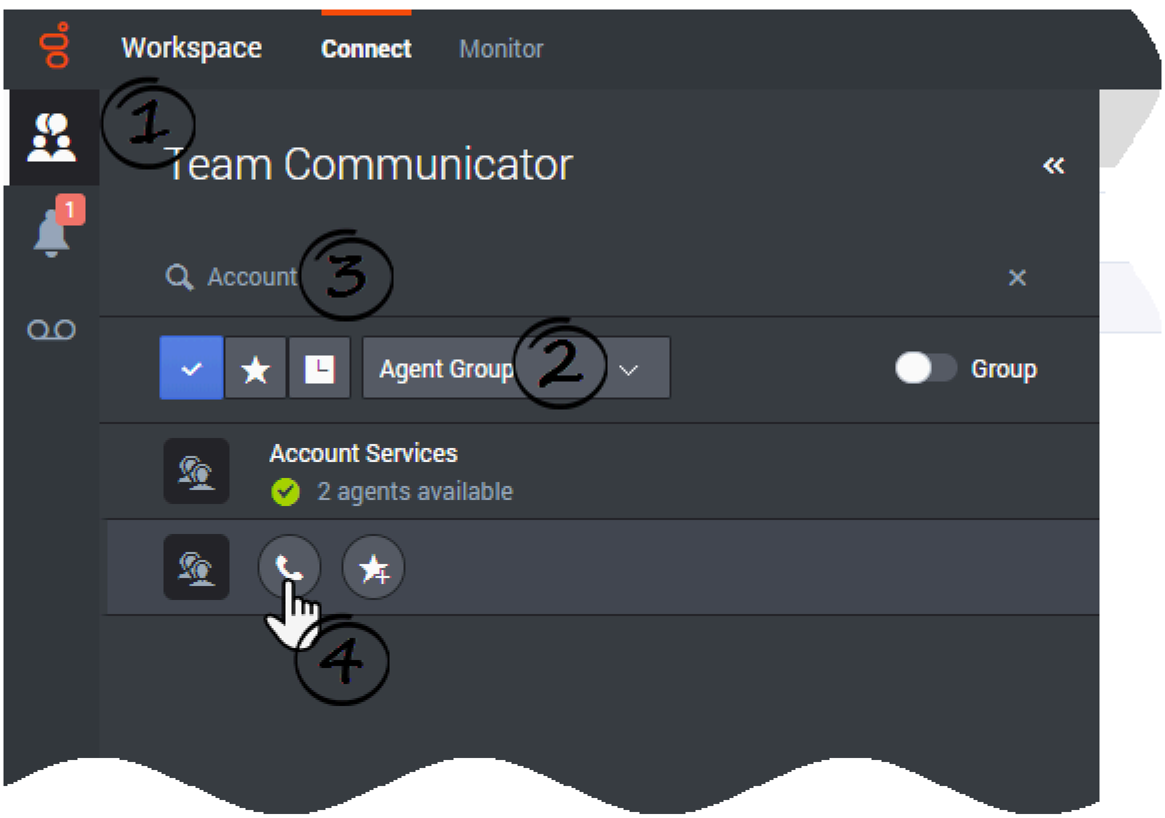
 transfers a voice call.

Some things to keep in mind:

- Case information might be visible to you, the transfer recipient, or your administrator.
- If your transfer request is not accepted, you must manually take your contact off hold.
- If there are no agents available, you might have to wait to transfer the call. (When transferring to an agent group, the agent availability information might be 10 to 30 seconds behind, so you might have to wait to transfer if there are no agents showing as available.)

Watch the video to see how a transfer works.

How do I call an Agent Group?



In some contact centers, agents are assigned to specific groups. For example, some agents in a company might speak different languages, have particular product expertise, or have a higher level of security clearance. These are all specialties that might be associated with an agent's group.

If your administrator has enabled this capability, you can enter the name of the agent group instead of the name of an agent when looking for a team member. Click the **Action Menu** drop-down list that is displayed next to the name of the agent group that you want to call.

Sometimes, no one in the agent group is available to take the call. If your administrator has set up Agent Desktop to display the number of available agents in the agent group, then you will see a message underneath the group name that tells you how many agents are available. If there are no agents available, you might have to wait to make the call.

Important

In some scenarios, the agent group availability information might be 10 to 30 seconds behind.

How do I contact another agent through a Routing Point?

In some contact centers, calls are handled through a Routing Point. Instead of transferring, conferencing, or consulting directly with another agent or to a member of an agent group, your environment might be set up to enable you to direct an interaction to another agent through a Routing Point.

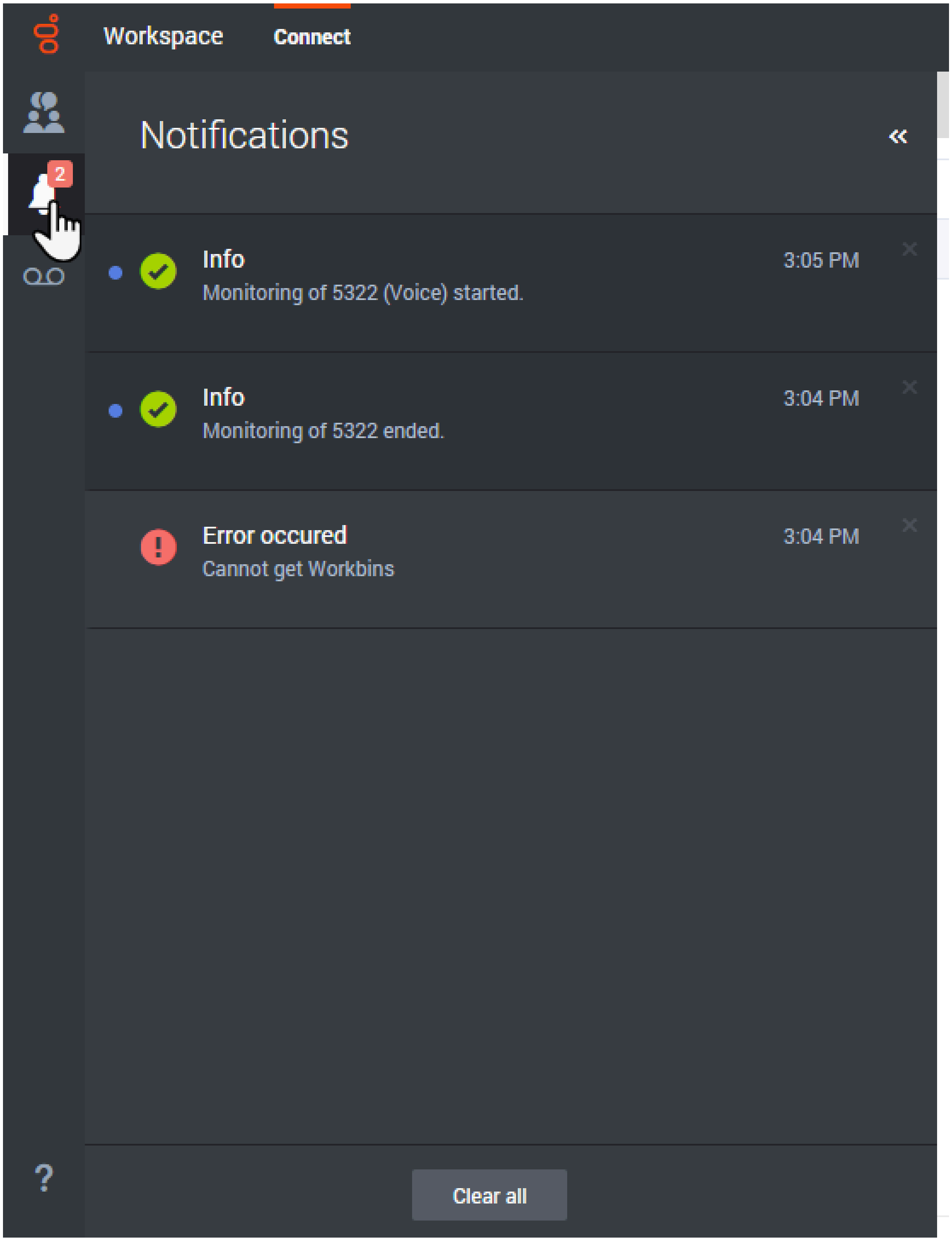
If your administrator has enabled this capability, you can enter the name of the Routing Point instead of the name of an agent or agent group when looking for a team member. Click the **Action Menu** drop-down list that is displayed next to the name of the Routing Point that you want to target.

Next to the Routing Point name you might see different colored icons (1, 2, and 3 in the screen shot) that indicate how busy the Routing Point is. The icon might represent the Average Waiting Time on the Routing Point, the number of interactions currently being handled, or some other statistic. These icons help you decide which Routing Point to choose or to give you an indication of how long it will be before your transfer, conference, or consultation will be handled.

The following icons might be displayed next to the Routing Point in Team Communicator:

- : There are no issues with targeting the Routing Point. The number of interactions being handled is below the warning threshold.
- : The Routing Point is in a Warning state. The number of interactions being handled is above the warning threshold but below the Error threshold.
- : The Routing Point is in an Error state. The number of interactions being handled is above the error threshold so the Routing Point is above capacity.

How do I read my notifications?



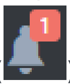
Notifications

You might receive messages and notifications from the system or your administrator.

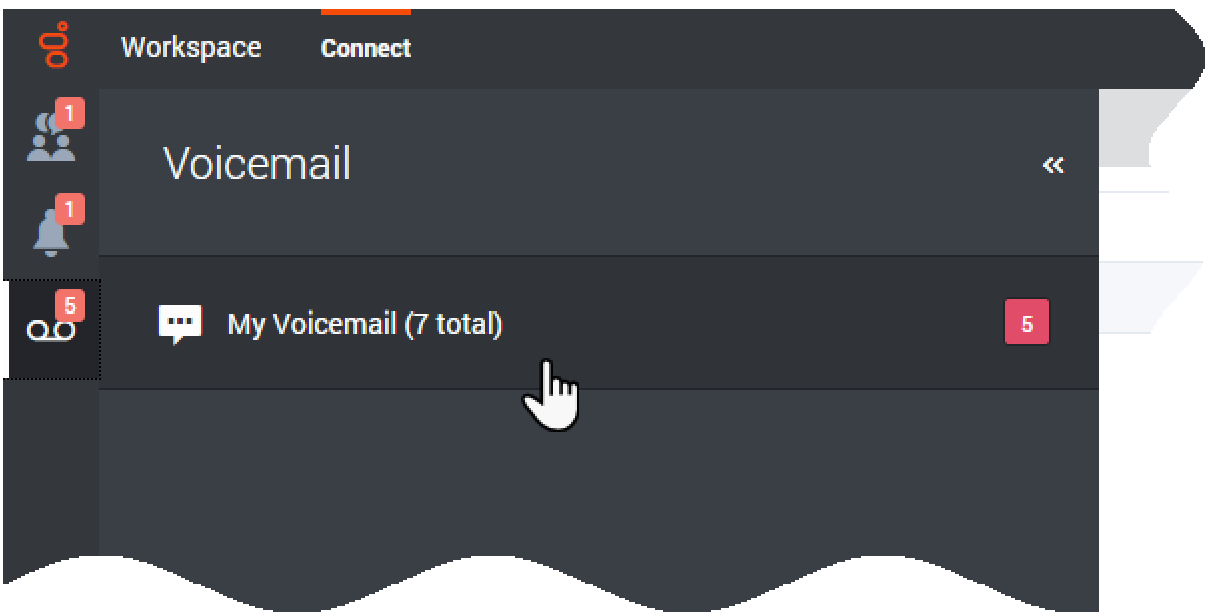
When a new notification arrives, you'll see a preview notification (you might also hear a sound/tone play).

Common notifications include:

- System-based messages (such as when a switch or channel is out of service)
- Voicemails

You can view notifications on the **Notifications** panel. In the Main View, click the **Notifications** button (). The most recent notifications are displayed on top, with a color and a status to indicate the priority.

Voicemail



If you have voicemail messages, you'll see an indicator beside the mailbox, like this: . This tells you how many unheard messages you have.

To call your voicemail box click the **Voicemail** button () to open the **Voicemail** panel. The **Voicemail** panel contains links to your personal and (if available) group voicemail boxes.

Click the voicemail box you want to open. A new internal interaction is launched. Use the keypad to enter your authentication information. The indicator tells you how many unheard messages you have. Beside the name of your voicemail box, the number in brackets tells you how many voicemails you have in total.

Tip: If you hover your mouse pointer over the message waiting indicator, you can see the number of messages in each of your voicemail boxes.

What next?

- Calls
- Team Communicator
- Navigating Agent Desktop

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history

Voicemail for Agents

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

You can access your voicemail box from Agent Desktop through the agent interface.

You can start accessing your voicemails after an administrator enables your voicemail box for you. Your voicemail box will be set up with default settings.

If you want to change your default voicemail box settings, you must set up your user profile. Your mailbox comes with a generic standard greeting. If you want to use a personal greeting or an extended absence greeting, you must record it.

You can access your voicemail account from the web, or from local or remote telephones.

Web access requires Chrome, Firefox, or Internet Explorer 9 or 10.

Access your voicemail from a local telephone

Your desktop telephone might have a Message Waiting Indicator (MWI) in the form of a light or an LED display, which indicates that this phone's mailbox has new messages waiting.

To access your voicemail from a telephone connected to your internal telephone system:

1. Press the **voicemail** key, if your phone includes one, or dial the voicemail access number. Your method of access depends upon your specific telephone model.
2. Enter your mailbox number and password, as required. If you are accessing your voicemail for the first time, you must change your password.
3. From the main menu, select from the following options:
    - Press **1** to play new messages. (Messages become old after 1 play.)
    - Press **3** to play old messages.
    - Press **4** to reach the greetings menu.
    - Press **5** to record your name or change your password.
    - Press **6** to access a group mailbox, if available to you. Press **1** and enter a group mailbox number or press **2** to hear a list of all available group mailboxes.

4. Use these commands while any message plays:
    - Press **1** to rewind 10 seconds.
    - Press **2** to pause or resume.
    - Press **3** to forward 10 seconds.
    - Press **4** to play a voice menu, which lists all commands for listeners.
    - Press **5** to hear envelope information about the call, for example: message length (in H:M:S) and Caller ID of sender.
    - Press **6** to forward the message.
    - Press **7** to delete. (Message is saved if not deleted.)
    - Press **#** (number sign) to go to the next message.
    - Press ***** (asterisk) to cancel and return to the main menu.

Note: In the Telephone User Interface (TUI), mailboxes can be accessed only with mailbox credentials (mailbox number). Using DN, agent, or user credentials to access mailboxes is not supported.

Access your voicemail from a remote telephone

To access your voicemail from a telephone not connected to your internal telephone system:

1. Dial the voicemail access number. If you have dialed into a group mailbox, you can only play messages.
2. Enter your mailbox number and password. If you are accessing your voicemail for the first time, you must change your password.
3. Press **#** to confirm.
4. From the main menu, select from the following options:
    - Press **1** to play new messages. (Messages become old after 1 play.)
    - Press **3** to play old messages.
    - Press **4** to reach the greetings menu.
    - Press **5** to record your name or change your password.
5. Use these commands while any message plays:
    - Press **1** to rewind 10 seconds.
    - Press **2** to pause or resume.
    - Press **3** to forward 10 seconds.
    - Press **4** to play a voice menu, which lists all commands for listeners.
    - Press **5** to hear envelope information about the call, for example: message length (in H:M:S) and Caller ID of sender.
    - Press **6** to forward the message.

- Press **7** to delete. (Message is saved if not deleted.)
- Press **#** (number sign) to go to the next message.
- Press ***** (asterisk) to cancel and return to the main menu.

Note: In the Telephone User Interface (TUI), mailboxes can be accessed only with mailbox credentials (mailbox number). Using DN, agent, or user credentials to access mailboxes is not supported.

Manage your greetings

You can manage greetings for your personal mailboxes. Only the Group Mailbox Administrators can change greetings and passwords for group mailboxes.

To manage your greetings from a local or remote telephone, press 4 and use these commands:

- Press **1** to record an `extended absence greeting`.
- Press **2** to record a `personal greeting`.
- Press **5** to activate the `standard greeting` that inserts your recorded name into a standard message. For example: You have reached the mailbox of *play_recorded_name*.
- Press **6** to activate your `personal greeting`. Not available or played unless this greeting exists.
- Press **7** to activate your `extended absence greeting`. Not available or played unless this greeting exists.

After initiating each action, follow the audio prompts.

- Press ***** to exit the Greetings menu and return to main menu.

Forward Your Voicemail

1. Press 6.
2. Enter a mailbox number.
3. Press 1.

   The voicemail is forwarded.

Notes

- Press * to cancel at any step.
- You cannot forward an expired voicemail.
- Forwarding a voicemail resets its retention limit in its destination mailbox.

Genesys Softphone

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Genesys Softphone is an application that enables your computer and phone or headset to connect to the public phone system. This section describes how to use the Genesys Softphone.

This article tells you how to use Genesys Softphone on your workstation, including how to start Genesys Softphone, activate and register users, view device and user status, and make and receive calls.

Genesys Softphone in Connector Mode

For most Genesys Engage cloud users, Genesys Softphone is in Connector Mode and starts automatically when Windows starts up, you do not have to start Genesys Softphone yourself.

If you right-click the Softphone system tray icon, you are given one menu option, **Exit**. Selecting this option stops Softphone. You must restart Softphone to enable you to log in to Workspace.

> **Important**
> The Genesys Softphone UI described in the Standalone mode section is not available in Connector Mode.

Softphone status indicators

Genesys Softphone displays different icons in the system tray to let users know its status and if there are any warnings or errors.

If you see a warning icon, hover your mouse pointer over the icon to read a tooltip summary of the problem. This tooltip will include the type of protocol your Genesys Softphone is configured to implement: "SIP" or "WebRTC". Specify which type is displayed when reporting an incident to your Administrator.

System tray Softphone status icons

Icon	Condition
	Waiting for agent login
	Agent logged in and Softphone registered
	Activation or registration error
	Headset issue
	Voice quality is currently degraded
	Microphone is muted

Genesys Softphone in Standalone Mode

If your system does not use Connector Mode, you can start the Genesys Softphone by double-clicking the Genesys Softphone shortcut on your desktop or by selecting it in your **Start** Menu.

To open the Genesys Softphone UI, right-click the Genesys Softphone ( ) icon from the Icon Tray and select **Open**.

Softphone status indicators

Genesys Softphone displays different icons in the system tray to let users know its status and if there are any warnings or errors.

If you see a warning icon, hover your mouse pointer over the icon to read a tooltip summary of the problem. This tooltip will include the type of protocol your Genesys Softphone is configured to implement: "SIP" or "WebRTC". Specify which type is displayed when reporting an incident to your Administrator.

System tray Softphone status and warning icons

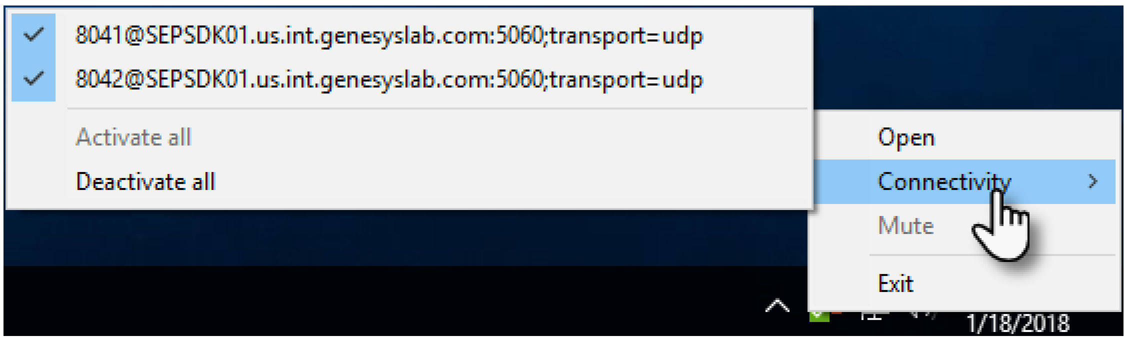
Icon	Condition
	Registered
	Registration error
	Headset issue
	Voice quality is currently degraded

Icon	Condition
	Microphone is muted

Activating and registering the user

When the Genesys Softphone first starts, it reads the user's information from the `Softphone.cfg` file, and automatically registers the user.

To verify that the user is registered, after starting the Genesys Softphone, right-click the softphone icon from the Icon Tray and hover over the **Connectivity** menu. You can register or un-register a connection by clicking and toggling the check marks. The notification area shows that the Softphone is active and ready to take calls.

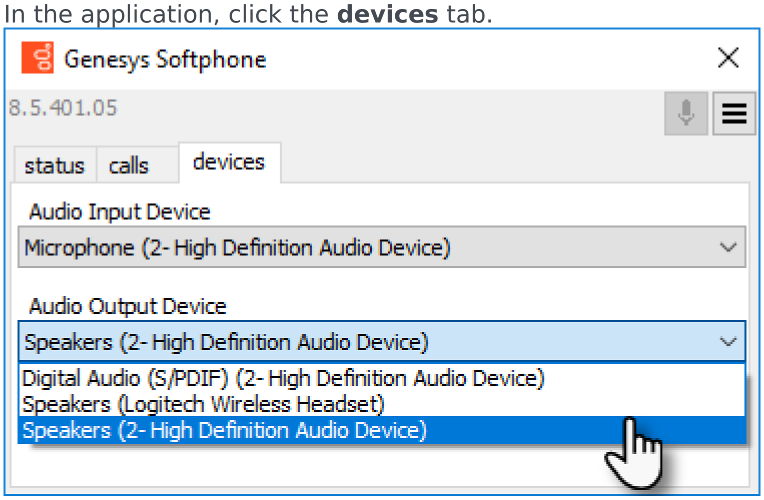


Selecting the input and output devices

The Genesys Softphone configures the input and output devices during start-up when it reads the list of devices from the Softphone.config file. However, if required, the softphone user can change the brand of device used while the Genesys Softphone is running.

To select an input or output device:

1. In the application, click the **devices** tab.

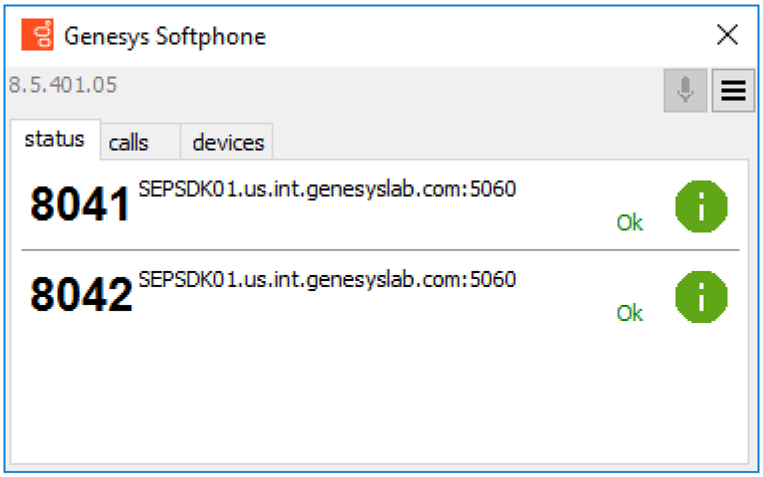


2. Select the appropriate microphone from the **Input Device** drop-down list.
3. Select the appropriate speaker from the **Output Device** drop-down list.

Viewing the Softphone users and status

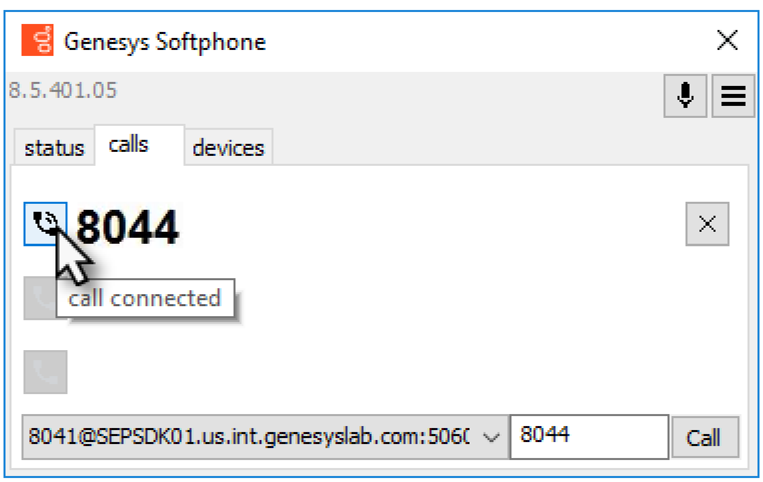
Each Genesys Softphone instance can have up to six SIP user accounts configured.

To view the number of users configured and their statuses, right-click the Softphone icon, and click **Open**. The **Genesys Softphone** window displays. Click the **status** tab.



Making and receiving calls

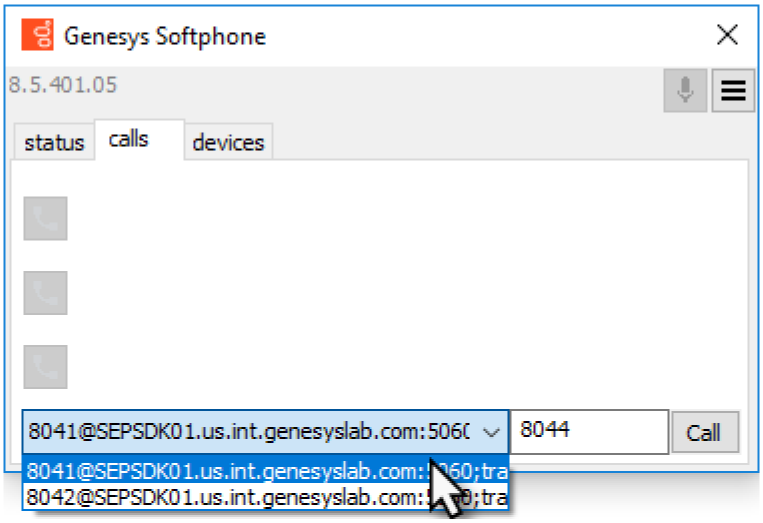
You can make and receive calls from the **calls** tab.



From this tab, you can perform the following operations:

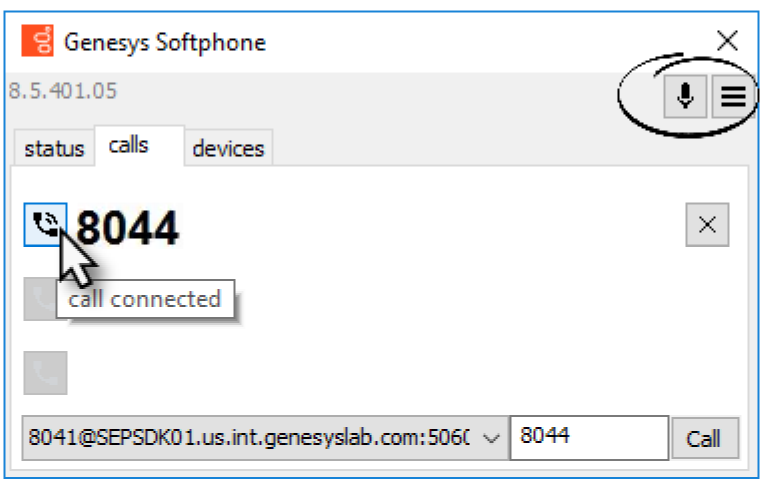
- Answer an incoming call—click the button of an *alerting* call to answer. If you were on another call, that call will be placed on hold.

- Hold a call—when you switch to another call, the currently active call is placed on hold.
- Retrieve a call—click the the line button of a call on hold to retrieve that call.
- Hangup a call—click the hangup button to terminate a call. You can terminate calls that are on hold.
- Dial and make a call—you can make a call by selecting an originating account (connection) from the connections combo box, entering a destination number, and clicking **Call**. Making a new call while another call is active places the existing call on hold.



Muting the microphone

The microphone button shows the current mute status, either muted or un-muted. Clicking the microphone button changes the status.



Mute/un-mute functionality works on the application level and not the system level:

- The mute button is only available when there is an active call.

- Muting the microphone in the Softphone is done on the session level. The mute status does not depend on the selected devices nor on device presence and status. A session may be muted even if a microphone is not plugged in.

You may also mute/un-mute the microphone from the tray icon menu. To mute/un-mute the input device:

1. Right-click the Softphone icon, and click **Mute**.
2. From the same menu, click **Un-mute** un-mute the input device.

> **Important**
> The mute menu item is clickable only when the Genesys Softphone is in an active session.

Gplus Adapter User Guide (v8)

Welcome to the *Gplus Adapter User Guide*. This guide provides all the information you need to start working with the adapter in your environment.

The Gplus Adapter can be implemented in two different options:

- **Gplus Adapter for Salesforce** is a soft phone that can be embedded in your Salesforce sales or service console or be accessed in a separate window that is launched from a **Phone** icon. The standard adapter has a fixed size and therefore the features and functionality is designed for a small screen space.
- **Gplus Adapter for Salesforce - Agent Desktop** is an enhanced soft phone that has a larger window size and thus provides many of the same features and functionality as the Genesys Workspace Agent Desktop.

Click any of the topics below for details.

Gplus Adapter for Salesforce

This chapter explains the features and functionality of this product.

Getting Started

Handling an Incoming Call

Chatting with a Customer

Gplus Adapter for Salesforce - Agent Desktop Option

This chapter explains the features and functionality of this product.

Gplus Adapter for Saleforce - Agent Desktop Option

Gplus Adapter (v8) for Salesforce

As an agent, you’ll be handling calls and making sure that you keep on top of your KPIs. Gplus Adapter is your softphone for handling calls (both inbound and outbound) and other interactions, such as chat or emails. The softphone is launched from your Contact management or ticket management system.

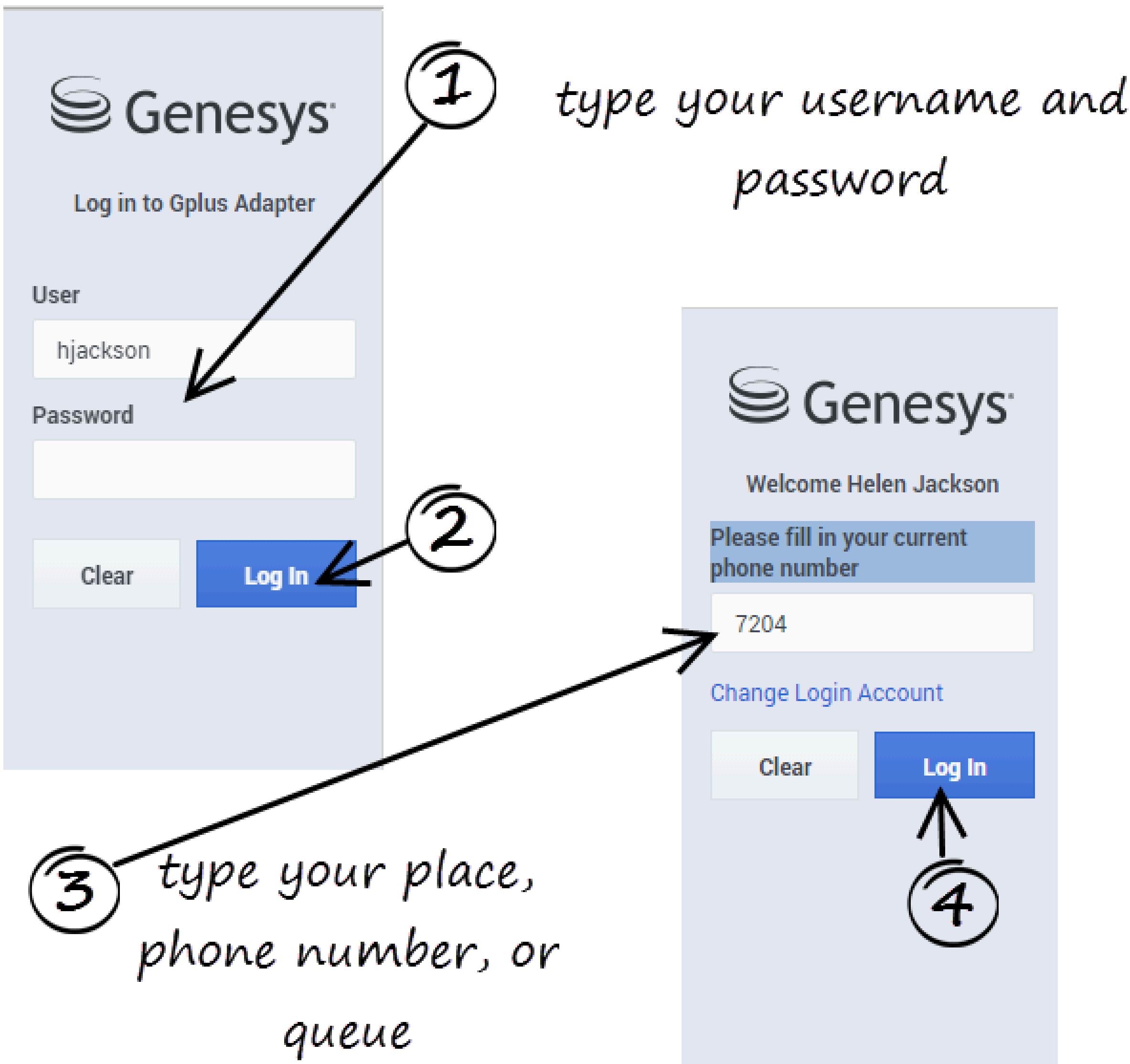
> **Important**
>
> What you see in the adapter depends on your contact center and your role within it, so you might not be able to do or see all the things covered in this help. If you think you should be able to do or see something you can't, check with your supervisor or system administrator.

To get quickly up and running with your Gplus Adapter for Salesforce, see Getting Started.

Getting started (v8)

Now that you know what the Gplus Adapter is, you're probably wondering how to use it. Let's get started.

How do I log in?

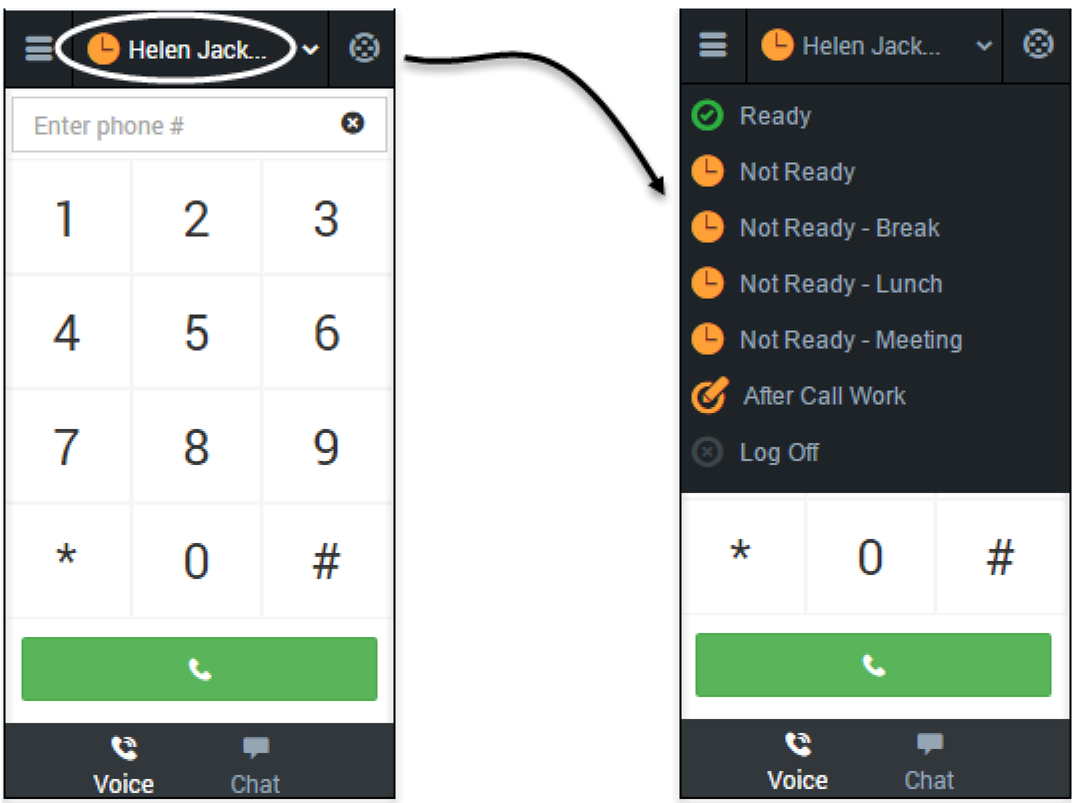


Open a browser (if your system uses a web-based phone, use Chrome) and enter the link for the CRM or ticket application that your supervisor gave you. The Adapter is either in the left pane or you can launch it by clicking **Phone** in the bottom right corner of the screen—it's one or the other, depending on how your administrators have configured the CRM.

Depending on how your administrator has configured the adapter, you might also see a secondary login page where you're prompted to enter the name of a place, a phone number, or enter a queue.

See Logging in for more details.

How Do I Start Taking Calls?



Typically, your status will be **Not Ready** after you log in. Keep in mind that your administrator might have configured your status to be set to **Ready** after login, so it is a good idea to check your status.

You can see your status in the Gplus Adapter for Salesforce on the agent status bar at the top of the adapter. You can also hover over the status with your mouse to see more details about login time, phone number, overall state, and media channel state.

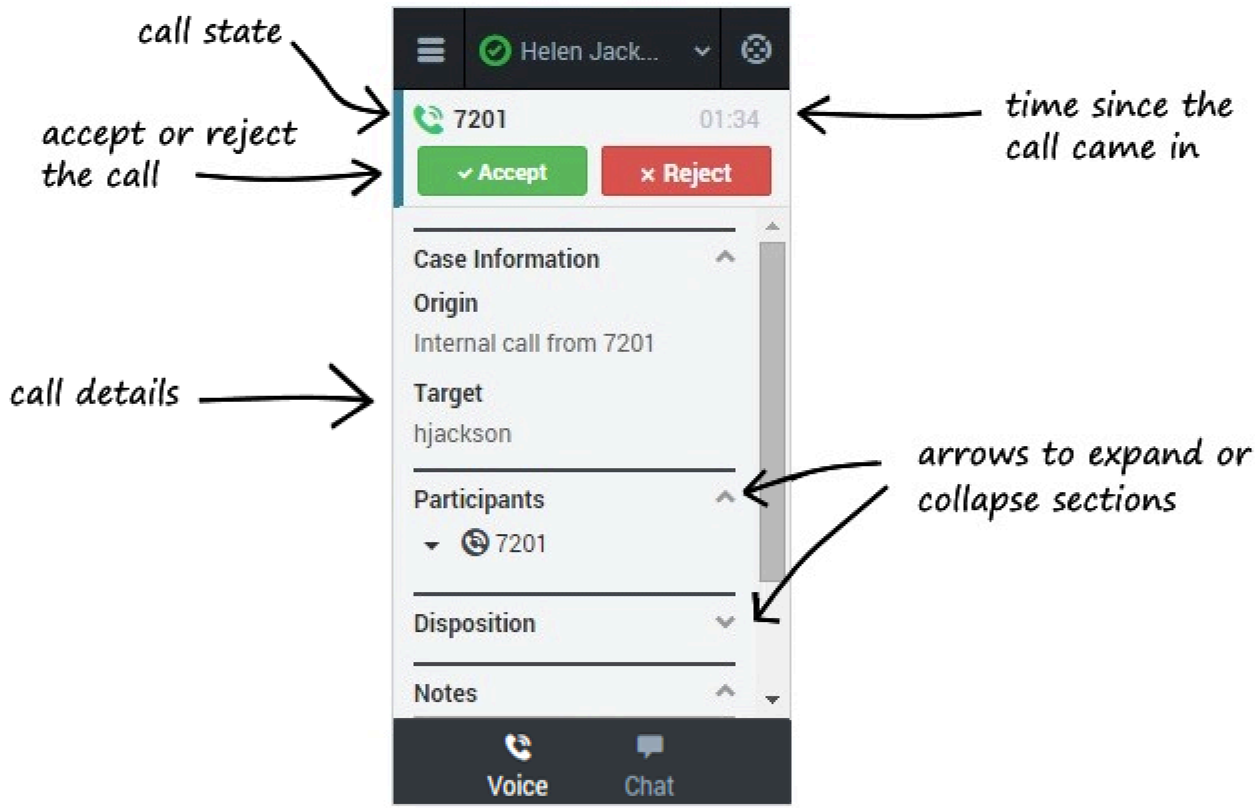
You can update your status on all channels that you are logged into or update your status on a single channel:

- To update your overall status, click the agent status bar, and select a new status.

- To update your status for a particular media channel, click the main menu, select **Channels** to see the list of channels, click the white agent status box, and then select a new status from the list.

For more information about changing your status, including a video that demonstrates how to do it, see Changing your status.

How do I handle customer interactions?



When a call, chat, or email is directed to you, you'll receive a "toast" pop-up in the bottom right-hand corner of your screen. You might also hear a sound.

To answer it, click **Accept**. (If you do not accept, it will go to the next available agent and your status will change to **Not Ready**.)

- Go here to learn about handling **calls**.
- Go here to learn about handling **chats**.

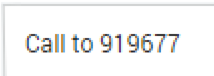
To get you started, here are some common call handling features:

 places the caller on **hold**.

 **restores** the call.

 instantly **transfers** the call to a contact that you select.

 **ends** the call.



calls back the participant that is disconnected from the active call. You can call back a disconnected participant by using the Participants drop down.

Your organization might require you to note a reason for the call (or a *disposition*). If so, after the call is complete, click **Disposition** and select one of the items from the list. Then you can click **Mark Done** to complete the interaction.

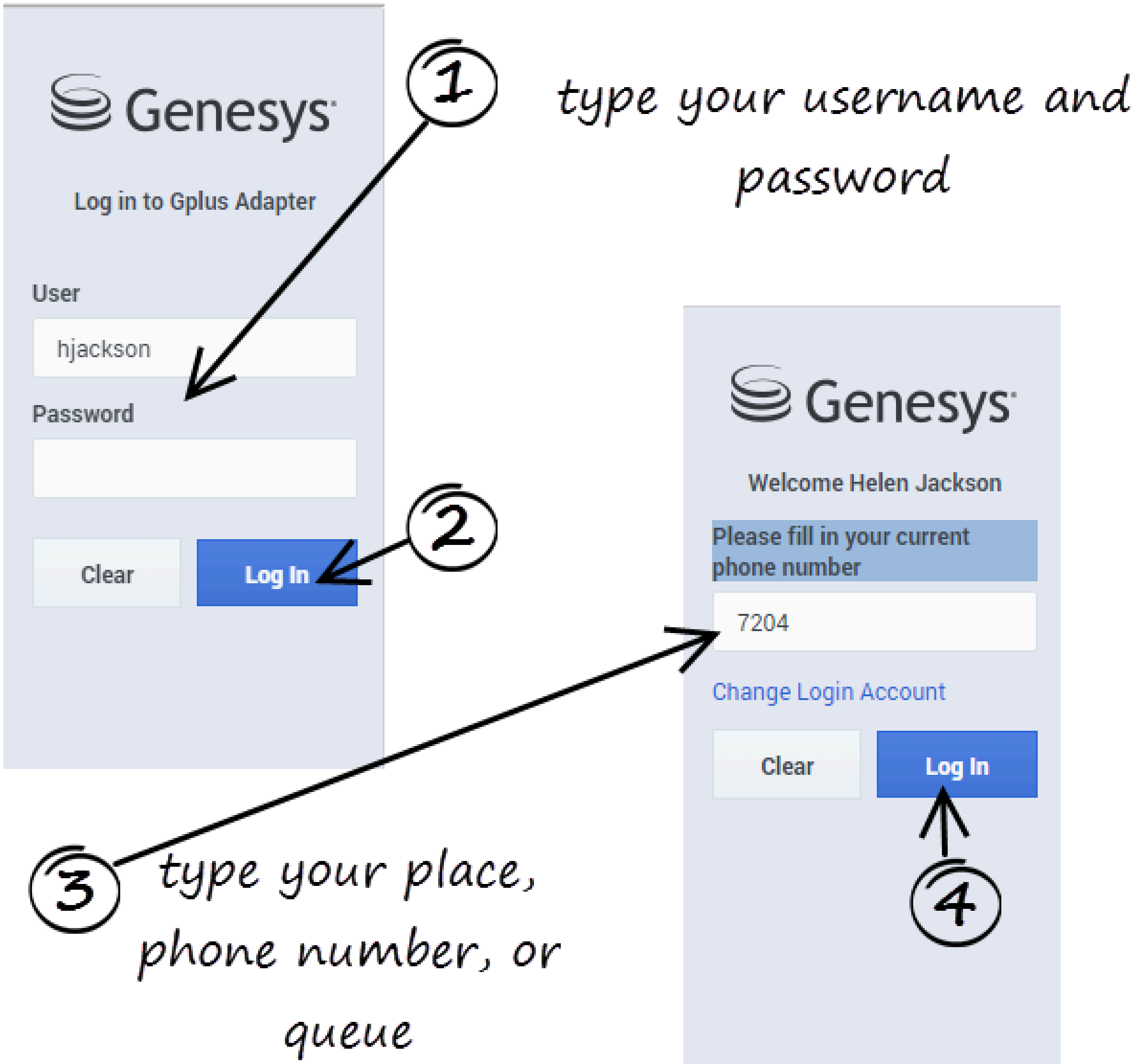
Depending on how your organization is set up, you might now enter an **After Call Work** state. This is a period of time during which you would remain in a **Not Ready** state to allow time for completing other tasks related to the call. When this period ends, you automatically return to a ready state and can again receive calls.

Logging in (v8)

The adapter is either in the left pane or you can launch it by clicking **Phone** in the bottom right corner of the screen—it's one or the other, depending on how your administrators have configured the CRM. If your CRM is configured for single sign-on, you don't need to log in into your Gplus Adapter. When you launch the Adapter, you should have immediate access. If your CRM isn't configured for single sign-on, you are prompted to log in.

If your Adapter is located in the bottom right of the screen, you can also undock the Adapter by clicking the arrow at the top right of the Adapter. This opens the Adapter in a new browser window that you can resize and drag to a new location. If you want to redock the window, just click the arrow again and the window returns to the standard location.

How do I log in to the Adapter?

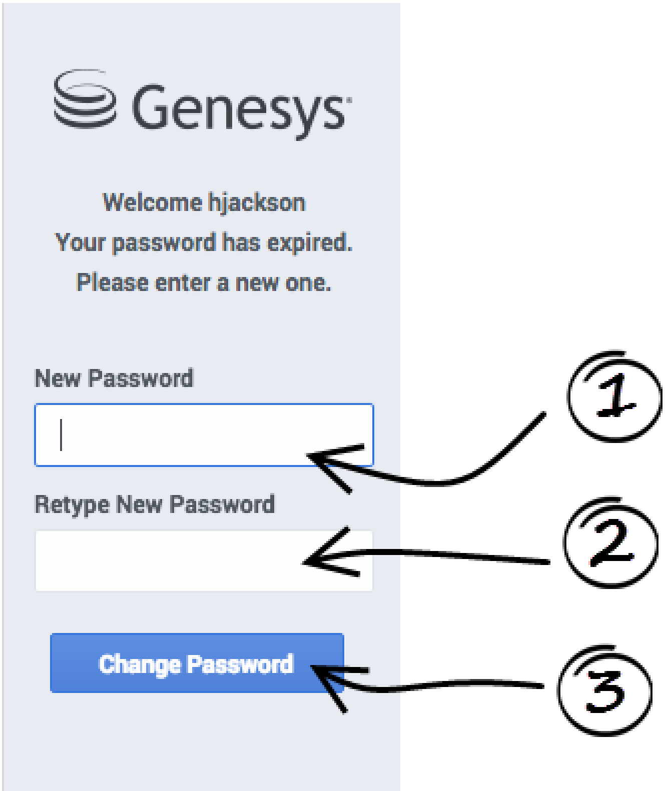


If you are prompted to log in, enter your Genesys username (such as an email address) and password and click **Log In**. If you have logged in before, your username should already be entered for you.

Depending on how your administrator has configured the adapter, you might also see a secondary login page where you're prompted to enter the name of a place, a phone number, or enter a queue.

If you have logged into the Adapter before, the login page automatically inputs your last known place. Most often, you can accept the last known place. If you have changed your place, phone number, or queue, you must update the field before you click **Log In**.

Changing your password



If your password has expired, you are prompted to change your password.

If needed, contact your administrator for password rules.

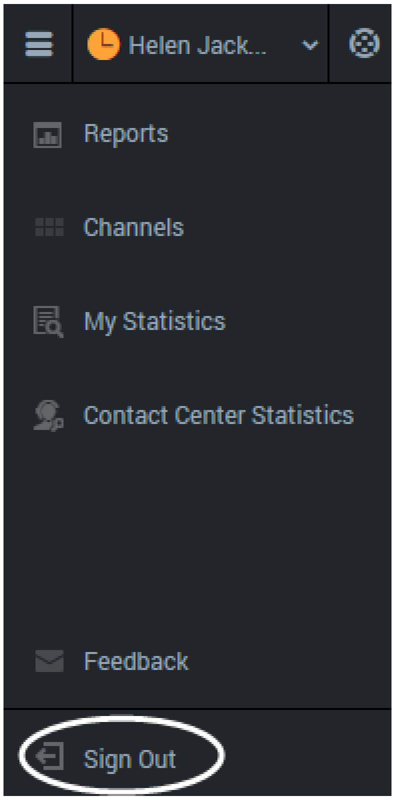
Adapter main view

After you log in, the main view is displayed. From this view, you can change your status, navigate among your channels, and make a call by using Team Communicator or the **Dial Pad** tab.

When you first log in, notice that your agent status is set for you; for instance, **Not Ready**. The default state is determined by your system administrator. If your status is not already set to ready, change your status to **Ready**.

> ### Tip
> After refreshing the page or after a call is completed, you must click anywhere within Salesforce or the Adapter. If you don't, a screen pop might fail to occur.

Logging out

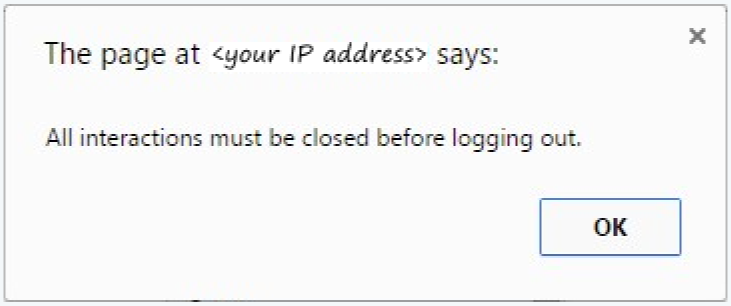


To log off all channels and sign out of Gplus Adapter for Salesforce, click the menu button , and then select **Sign Out**. The adapter returns you to the login page, where you can enter your credentials again, if needed.

When you log out, all interactions are terminated and do not resume when you log back in again; therefore, ensure that your interactions are complete before logging out and closing your browser window.

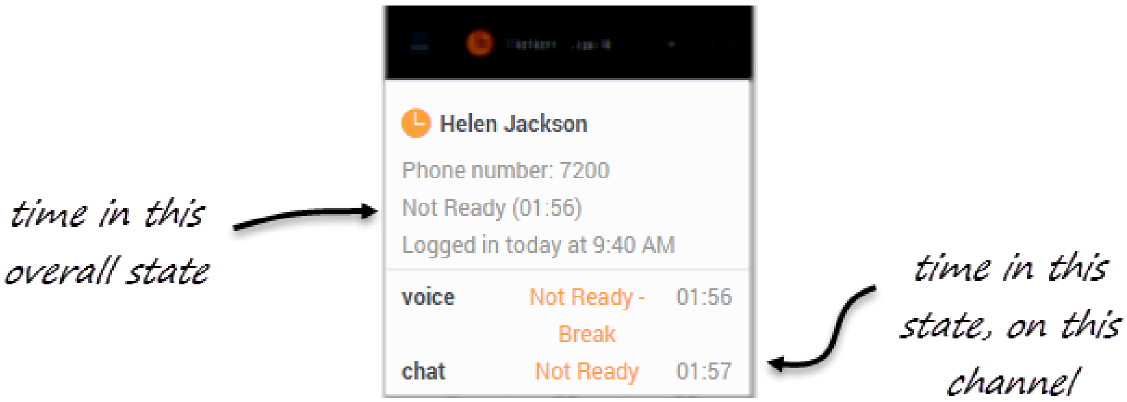
Tip

You can't sign out if you have any active calls. If you try, the following error message is displayed. You must click **OK** before you can continue working with the adapter.

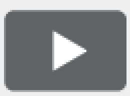

The page at <your IP address> says:
All interactions must be closed before logging out.
OK

Changing Your Status (v8)

You can see your status in the Gplus Adapter for Salesforce on the agent status bar at the top of the adapter. You can also hover over the status with your mouse to see more details about login time, phone number, overall state, and media channel state.



The following video gives you a demonstration on how to change your status on a particular channel:



[+] Show video: Updating your agent status on a channel

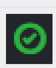
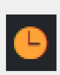
Link to video

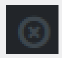
Status choices

When you change your status, you choose from a list of states set by your administrator. Generally, you'll see **Ready**, **Not Ready**, and **After Call Work**, but you could also see variations of these options with specific reasons.

Here's a table to describe at the status choices you might see in your adapter:

[+] Show table

Status	Icon	Description
Ready		You're ready to start accepting calls.
Mixed status		Your status is **Not Ready** on at least one of your logged-in channels.
Not Ready		You're not ready to accept calls. You might also see options such as **Not Ready - Lunch**.

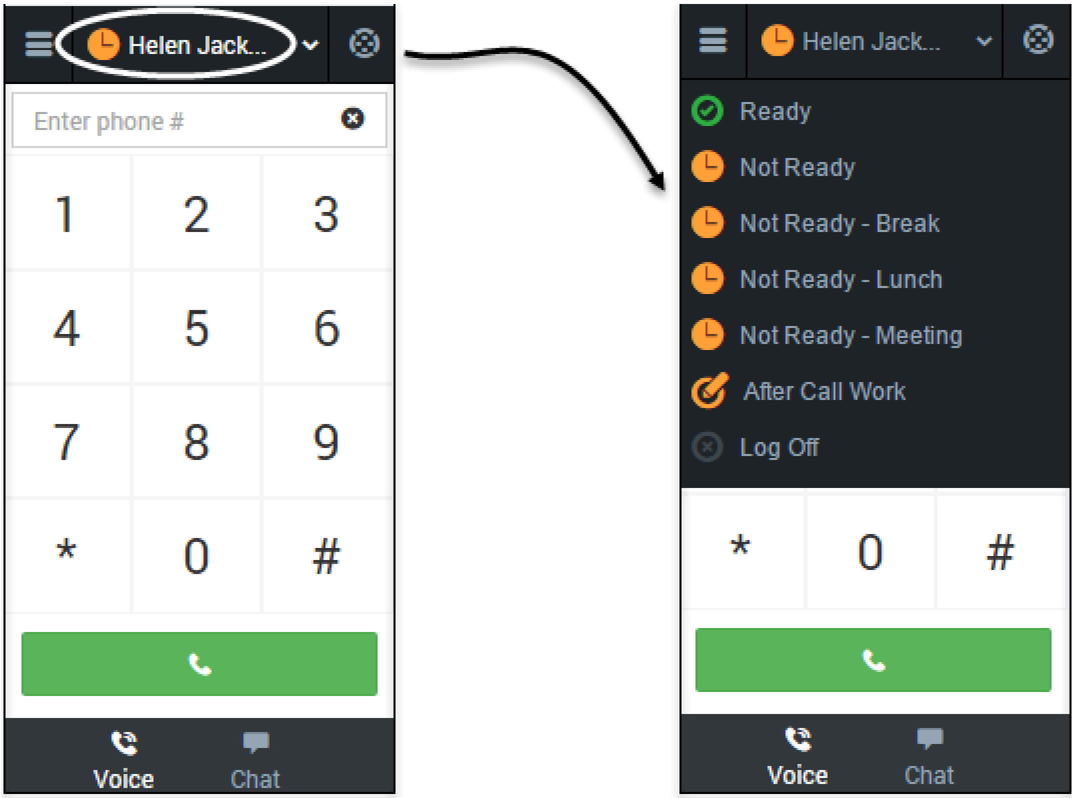
Status	Icon	Description
After Call Work		You're not ready to accept calls because you're completing some admin duties for a previous call. You might also see options such as **After Call Work - Verification**.
Log Off		Log off all channels. You can log off all channels on your adapter and still remain logged into the adapter.

Tip

Your environment might be configured to automatically change your status:

- When a call ends, your status might be set to **After Call Work** .
- When you click **Mark Done**, your status might be changed from **After Call Work** to **Ready**, **Not Ready**, or some other value, .

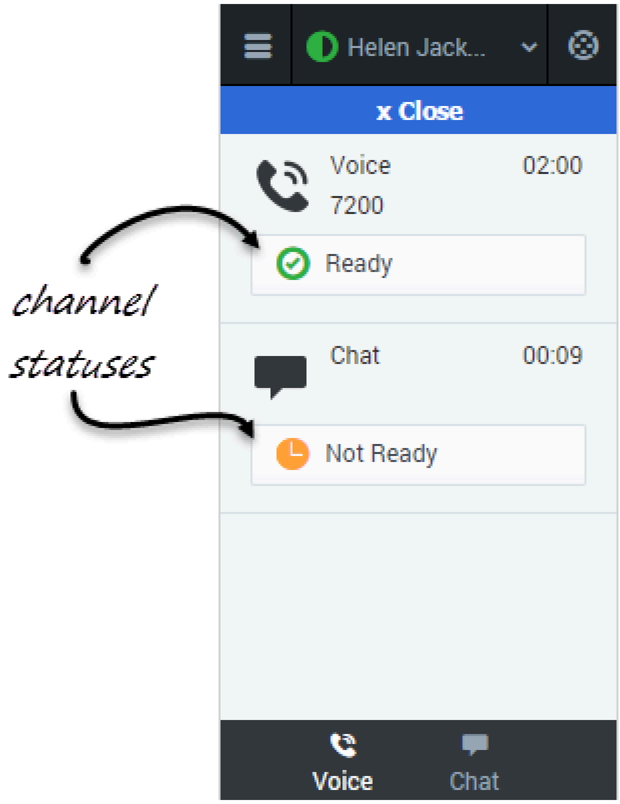
Updating your overall status



If you're logged in to multiple channels, selecting a new status from the status bar changes the status across all channels. Your overall agent status only considers the status of the channels that you are logged into. For example, if you are logged into the voice channel and in **Ready** state, but not logged into the chat channel at all, your global agent status indicates that you are in a global **Ready** state.

To update your overall status, click the agent status bar, and select a new status.

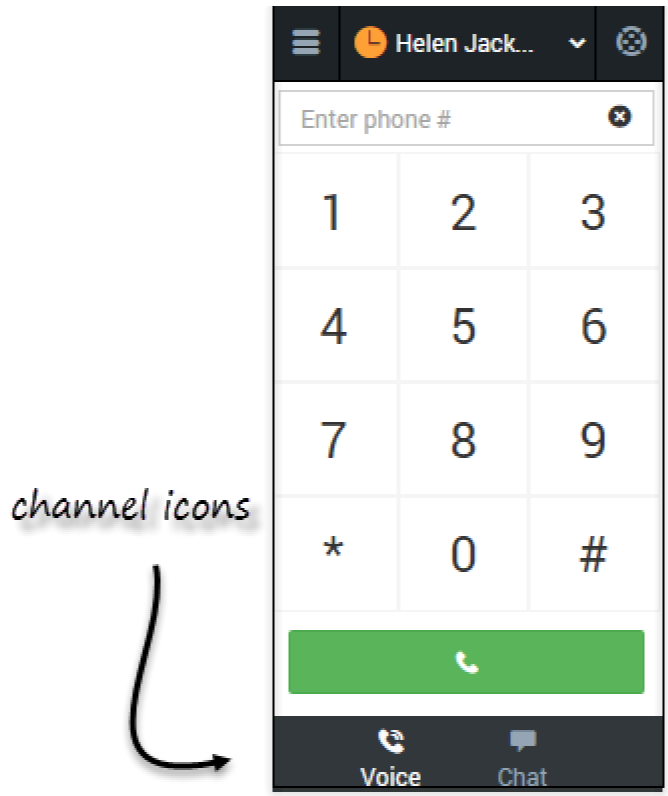
Updating your status on a single channel



To update your status for a particular media channel, click the main menu, select **Channels** to see the list of channels, click the white agent status box, and then select a new status from the list.

Navigating to a Channel (v8)

You can navigate to a different media channel in the Gplus Adapter for Salesforce by selecting the channel icon at the bottom of the adapter.



You can also view details about all your channels through the main menu: click **Channels** to see the list of channels that you're configured to use. You can use channel list to change your status on a particular channel.

Handling calls (v8)

The Genesys Gplus Adapter provides you with controls and features that let you handle voice interactions with contacts or internal targets (such as other agents).

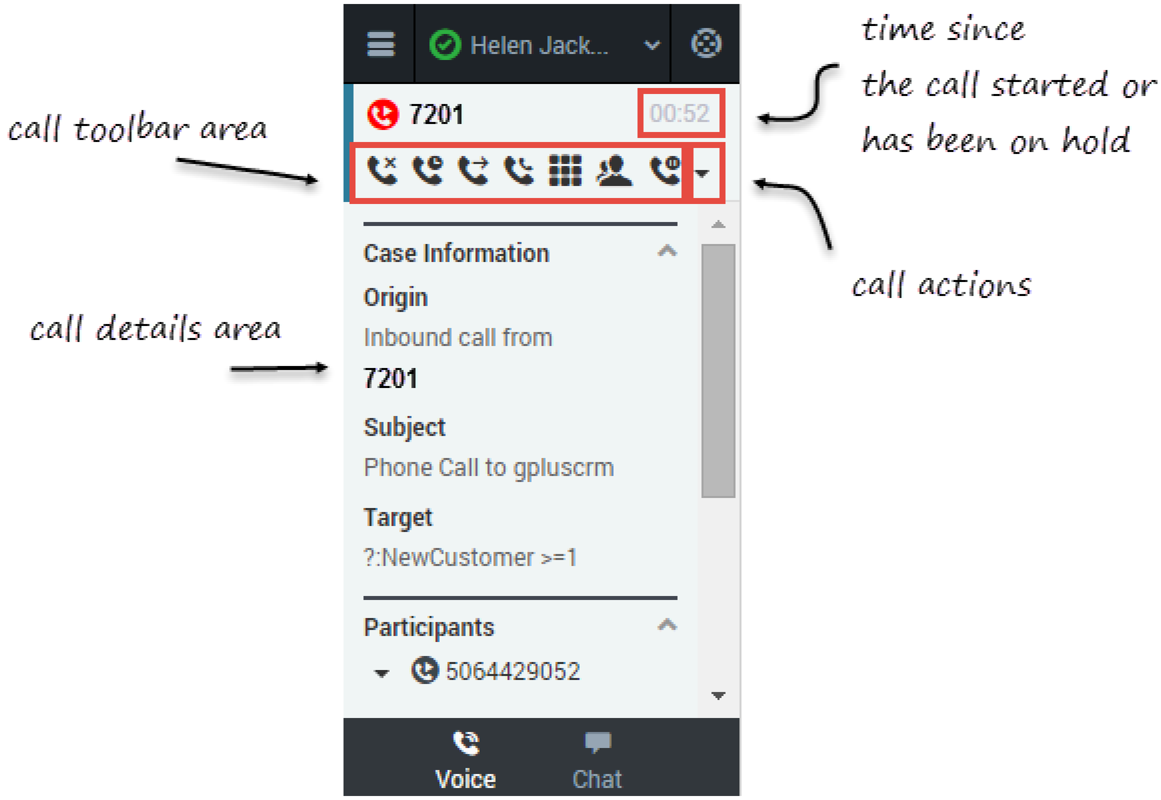
How do I handle calls in the adapter?

Link to video

When you navigate to the voice media channel, you'll see the default view where you can:

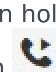
- Handle an incoming call
- Dial a call
- Transfer a call
- Perform an instant conference call
- Initiate a consultation
- Call back a disconnected party
- Record a call

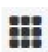
Adapter Main View



Once you have an active call — because you called someone or someone called you — the main voice channel view changes to the call view. This view has two main areas: call toolbar and call details.

When you have an active call, the call toolbar displays icons for actions that you can perform during a call. Depending on the Adapter configuration, you might see some or all of the following toolbar icons:

Icon	Description
	Ends the call.
	Places the call on hold. After the call is hold, the **Retrieve** button  is displayed. Tip If your contact center is configured to display hold time duration, the call timer in the top-right of the Adapter window resets to display how long your call is on hold. When you take the call off hold, the timer returns to showing the duration of the call again.

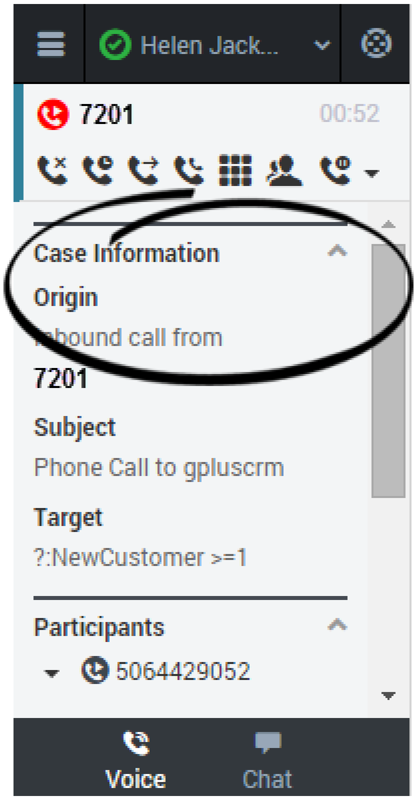
Icon	Description
	Redirects the call to another contact you select using Team Communicator. See Transferring a Call for details.
	Starts a voice conference instantly with the current caller and another contact that you select using Team Communicator. See Performing an Instant Conference for details.
	Starts a voice conference instantly with the current caller and another contact that you select using Team Communicator. See Performing an Instant Conference for details.
	Shows the keypad. You can use this to enter digits when you're navigating voice menus or prompts. Type or select the digits, and then press **Enter** on your keyboard.
	Starts a consultation with another contact before transferring or conferencing the call to that contact. See Initiating a Consultation for details.
	Pauses call recording. See Recording a Call for details.

Call Details

The call details view shows you all the data the adapter has about the call, and it provides fields that you can edit to add more information:

- Case Information
- Participants
- Disposition
- Notes

Case Information



The Case Information section shows you read-only information about the call — the exact information is determined by your administrator.

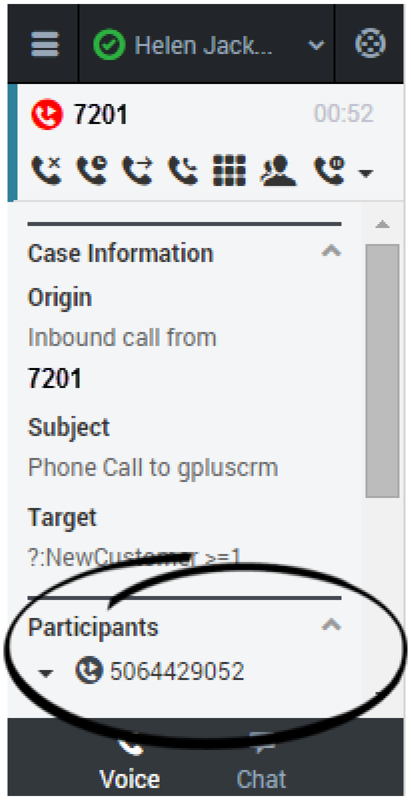
Here are a few examples of some information you might see in your call view:

- Origin
- Target
- Contact name
- Call type
- Account information
- Subject

Depending how your administrator configured your agent, you might be able to add, edit, or delete case information. For more information, see How Do I Edit Case Information?

Case information fields might can contain a URL that you can click to access more information.

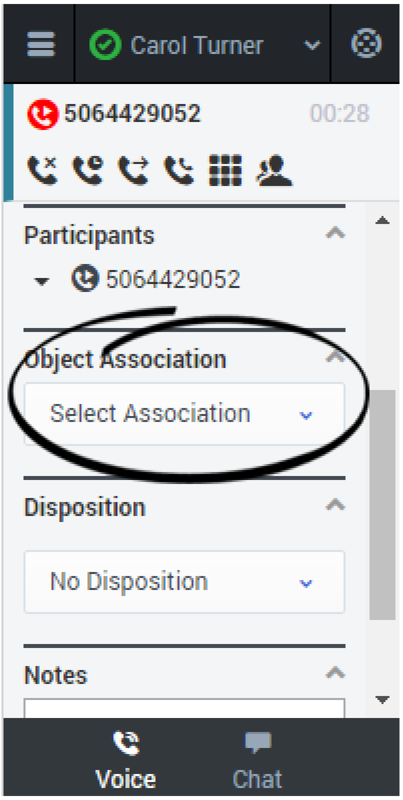
Participants



The Participants section shows you read-only information about who else is on the call and the state of the participant (Ringing, Connected, Ended, and so on). This section is especially helpful when you're trying to keep track of who is participating in a conference call.

From the Participants section, you can also call back a participant that was disconnected from the current call. To call back, expand the **Participants** drop down, hover over the participant number and click the **Call to** action. The call is established as a normal outbound call.

Object Association



During a call or as part of your after-call work, you can associate the interaction with a Salesforce object, such as a customer record. The **Object Association** menu lists options that are related to the object tabs that are displayed in Salesforce.

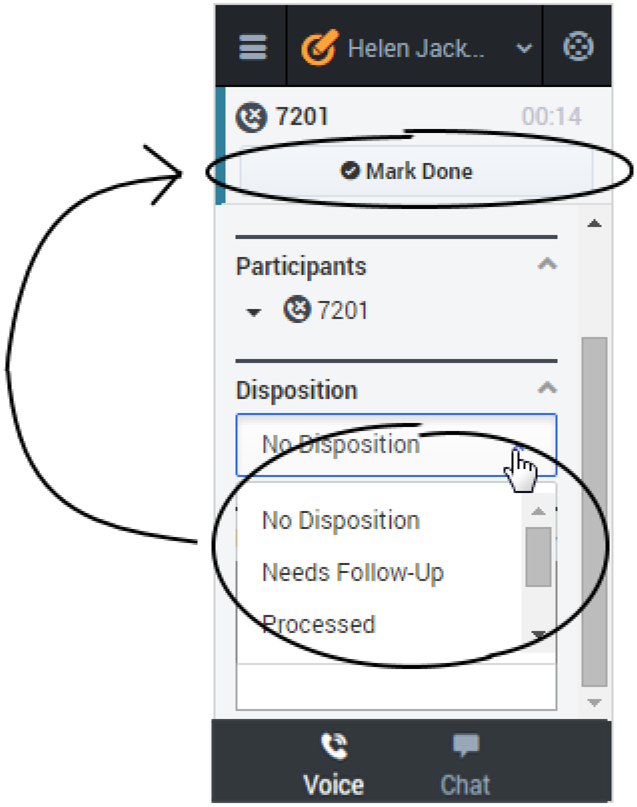
To understand the connection between the **Object Association** menu and Salesforce objects, consider this scenario:

1. You accept a call from John Smith. Salesforce automatically displays John Smith's information in a tab. In the adapter, **John Smith** becomes an option in the **Object Association** menu.
2. You then open another Salesforce tab to display information about another customer named Willard Clinton. In the adapter, **Willard Clinton** is added as another option on the **Object Association** list.

Important

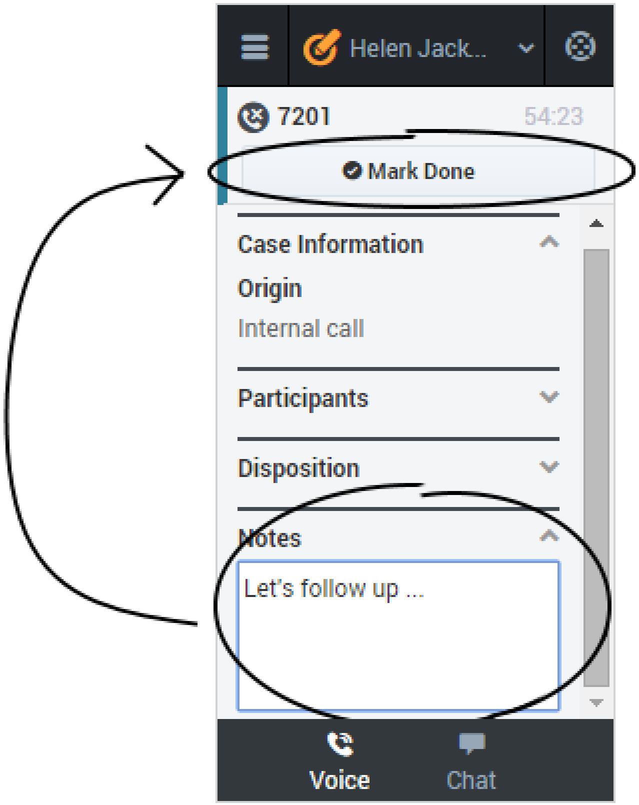
- If your contact center does not permit you to edit case data, the **Object Association** menu is not displayed.
- Avoid opening the Adapter in multiple browser tabs. Object association works only in a single browser tab.

Disposition



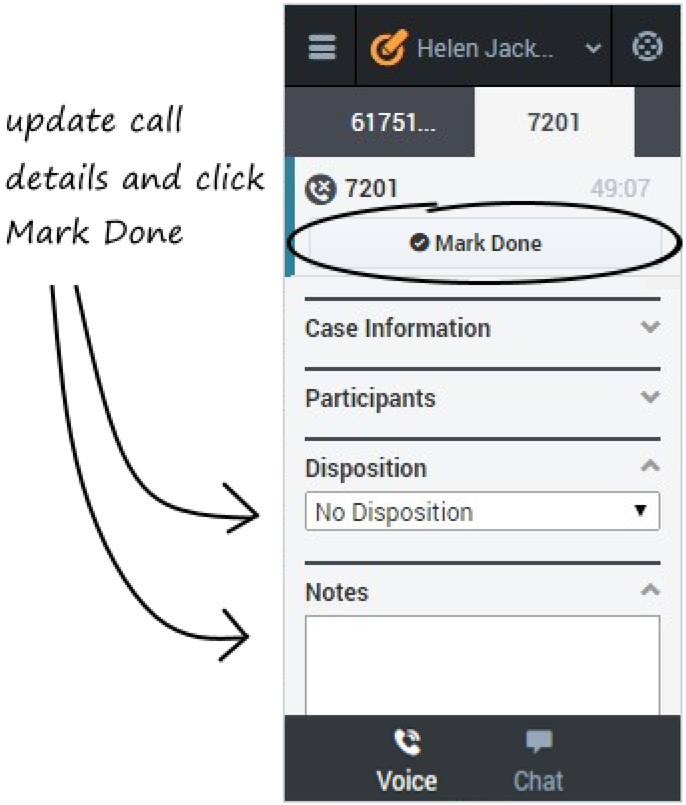
If configured by your administrator, you can change the disposition for a call either during the call or as part of your after-call work. You can use this field to record the business outcome of the call. To update, click the drop-down list, and then select a disposition. Ensure that you don't click **Mark Done** first before you select a disposition. You can't make any further changes after you click **Mark Done**.

Notes



If configured by your administrator, you can add notes either during the call or as part of your after call work. To update, just enter your comments in the text field. Ensure that you don't click **Mark Done** first before you add a note. You can't make any further changes after you click **Mark Done**.

Finishing a call



When your call is over, either because the other party left the call or you clicked **Hang up** , you might need to update some information in the call details area (such as disposition or notes). Your adapter might be configured to automatically change your status to **After Call Work** to give you time to complete this task; if not, you can change the status yourself. Your adapter might be also configured to automatically mark the call as done as soon as the call is over.

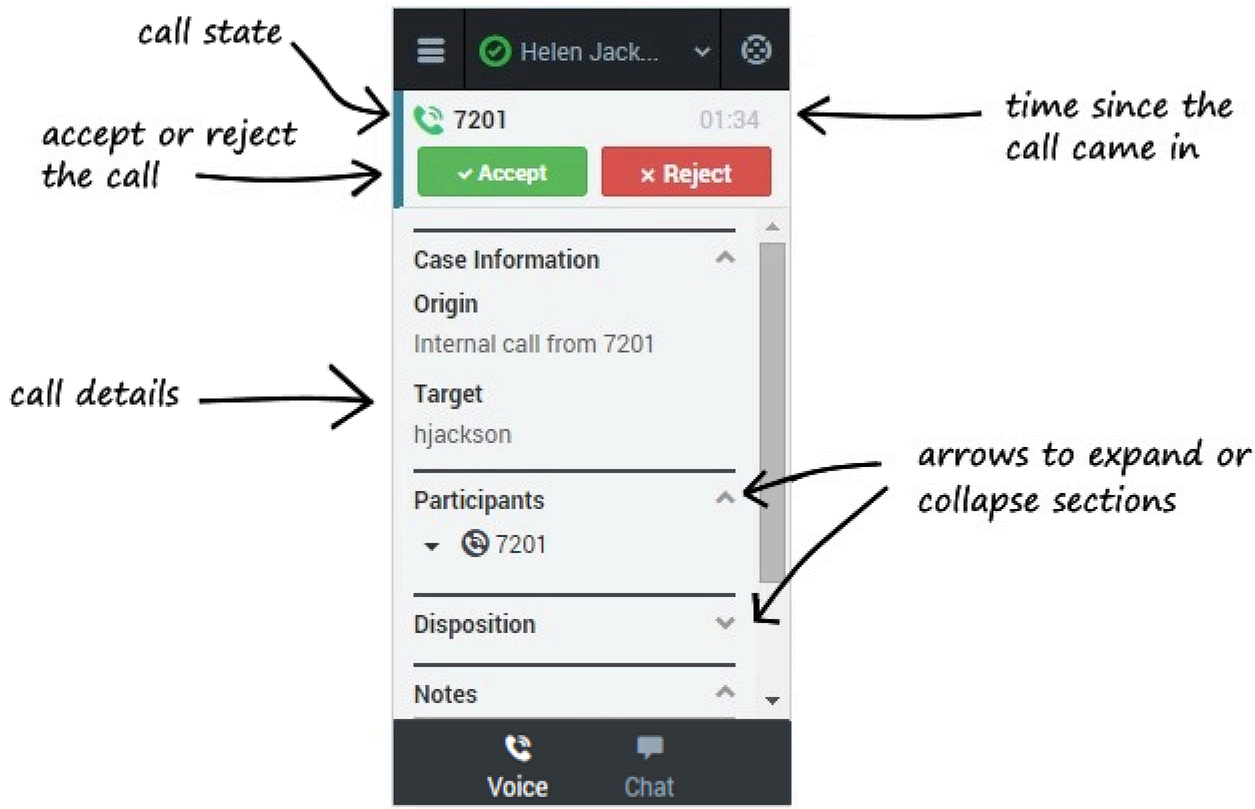
After you finish your after-call work, you can click **Mark Done**, which completes the call and sends you back to the main voice channel view. At this time, your status might automatically change to **Ready**, **Not Ready**, or some other value; otherwise, you have to change it yourself.

If you are finishing multiple calls, just click the tab for a call, enter any necessary information in the call details area, and click **Mark Done**. Then, move on to your next call tab.

Answer incoming calls (v8)

You can start receiving calls as soon as you set your status to **Ready** on the voice channel in the Gplus Adapter for Salesforce.

How do I accept a call?



When you get a call, the adapter's incoming call screen displays. You can **Accept** or **Reject** the call, see the amount of time since the call came in, and see the call's state. You also see the call details area, which displays sections for Case Information, Participants, Disposition, and Notes. You can review this information before deciding whether to accept or reject the call. Take a few moments to identify the components of the incoming call screen.

Another visual indicator that you have calls waiting is a red circle with a number displayed on the **Voice** icon at the bottom on the adapter. The number indicates how many invitations are pending. This is useful for when incoming calls are waiting for you while you are on another screen in the adapter or working in another channel.

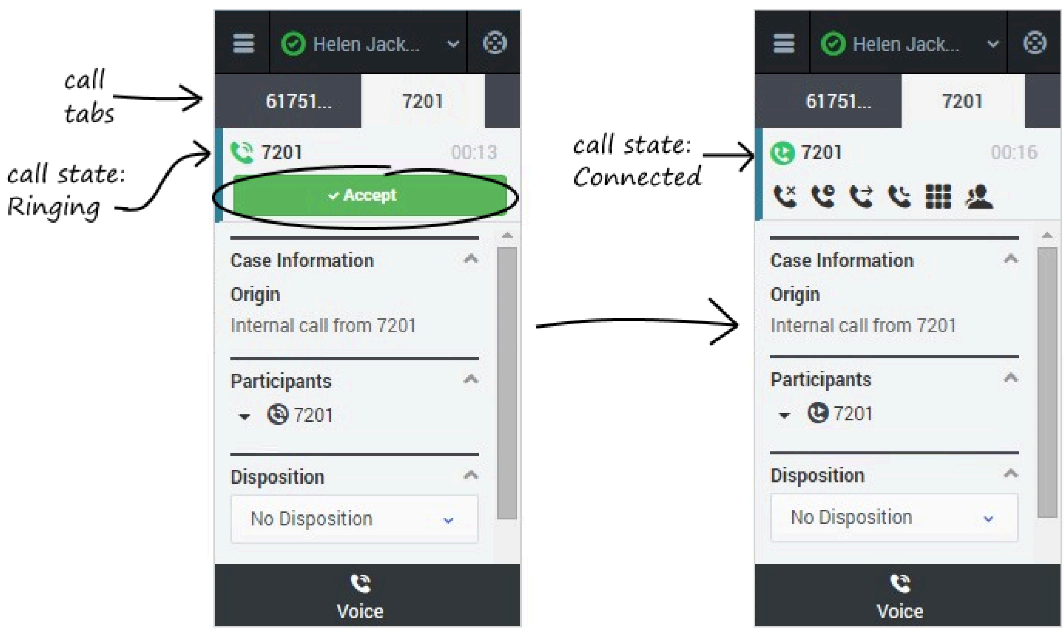
If you reject the call, you'll be taken back to the main view for the voice channel. If you accept the call, you'll see a list of Call Actions you can take in the call toolbar area.

Important

If your administrator has configured it, you might also see related information about the caller in Salesforce. This information might be displayed either while the call is ringing or after you click **Accept**. For example, if the caller already exists in the Salesforce contact database, you might see the Edit Contact screen.

You can work with the standard call actions, or you can modify the call data by setting the disposition or adding notes about the call.

How do I accept a second call?



While you're on an active call, you might get another unrelated direct call from someone else. If this happens, the adapter opens a new tab and shows you the same call overview information with the option to accept.

Tip

You don't see **Reject** in this scenario because rejecting a call puts it back in the system so it can be routed to another available agent. We don't want that to happen if someone is trying to call you directly.

As soon as you accept the new call, the adapter puts your original call on hold. You can go back to your original call by selecting the corresponding tab and clicking **Retrieve**  —this puts your second call on hold. If you have more than two active calls, the rest are displayed in a dropdown list next to the tabs.

Dial a call (v8)

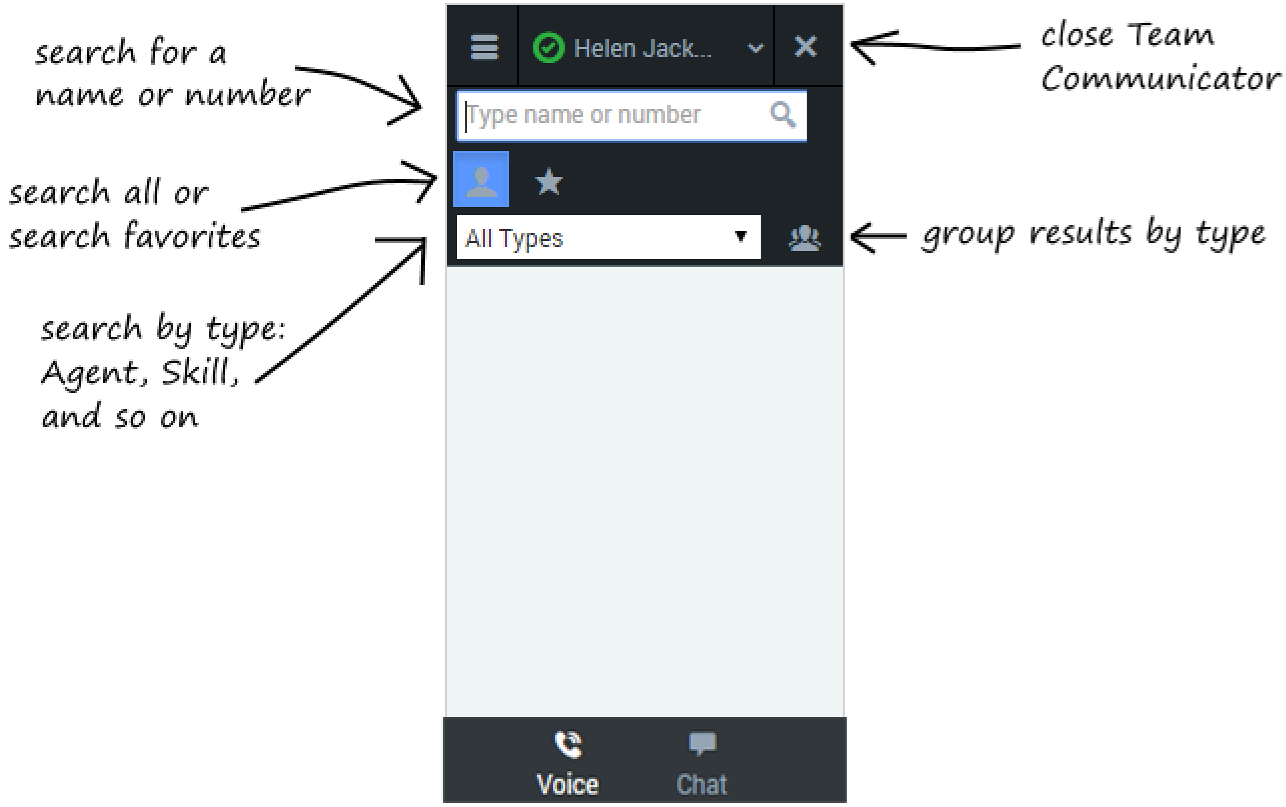
You can use the Gplus Adapter for Salesforce to make calls to contacts by using the dial pad, using Team Communicator, or using click-to-dial.

In some contact centers, you can choose a Caller Identification to be displayed on the phone of the contact that you are calling.

Using the dial pad

Making a call by using the dial pad is simple—just click on the numbers you want to dial (or enter them manually in the phone number field) and click **Dial**.

Using Team Communicator

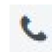


Team Communicator is a powerful tool you can use to search for contacts within your organization or outside your organization and then start a call with that contact. The types of contacts that are available to you in Team Communicator are configured by your administrator — you might not see all the fields and buttons that are described in this section. Your administrator might have added some commonly-used contacts to your favorites list, but you can also add your own favorites.

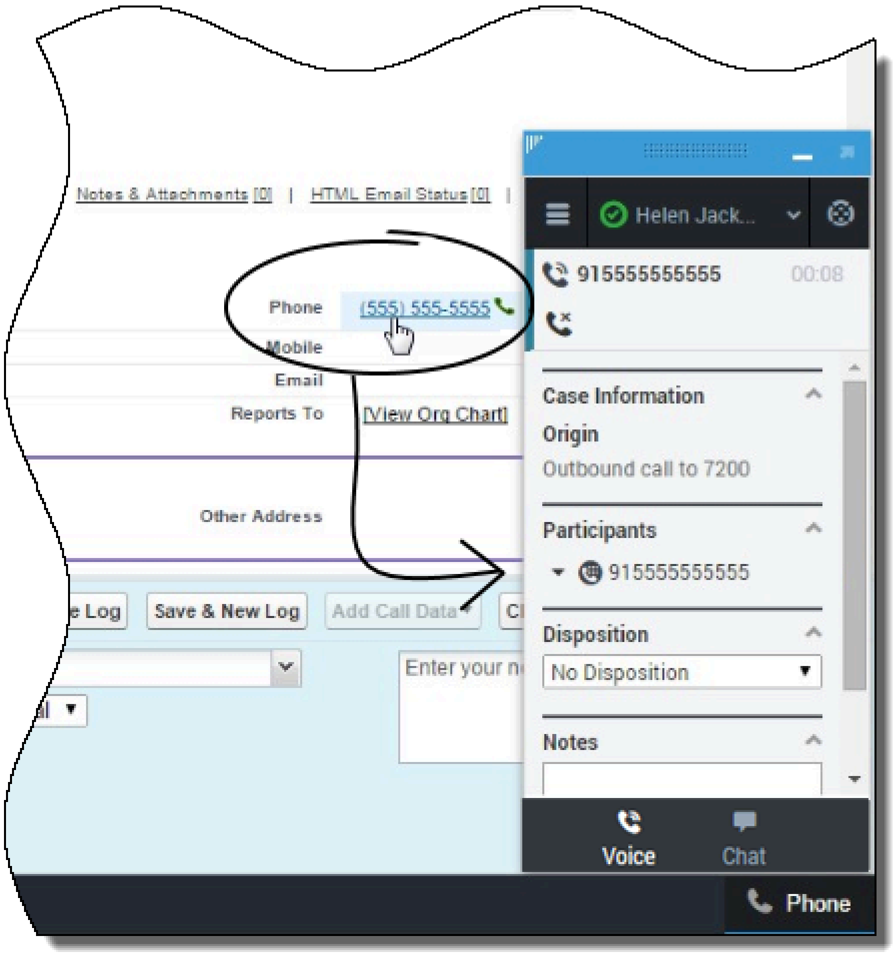
To open the Team Communicator, click **Team Communicator** .

There are many ways to use Team Communicator:

- The simplest is if you know the number of your contact, then you can type it in the text area and press **Enter** on your keyboard to immediately start a call.
- You'll probably use Team Communicator primarily to search for contacts. To get started, just type a name in the text area — as you type, Team Communicator suggests known agents, contacts, and other resources. You can also group your results according to type by clicking **Show Types** . You can collapse these groups by selecting the arrow next to the group name.
- You can also search through your favorites, configured by your administrator, to find a contact to call.
- Finally, you can search for contacts by Skills, Groups, and so on, which can be helpful when you need to call any agent with a particular skill—for example, you might need to transfer a call to an agent who speaks a particular language.

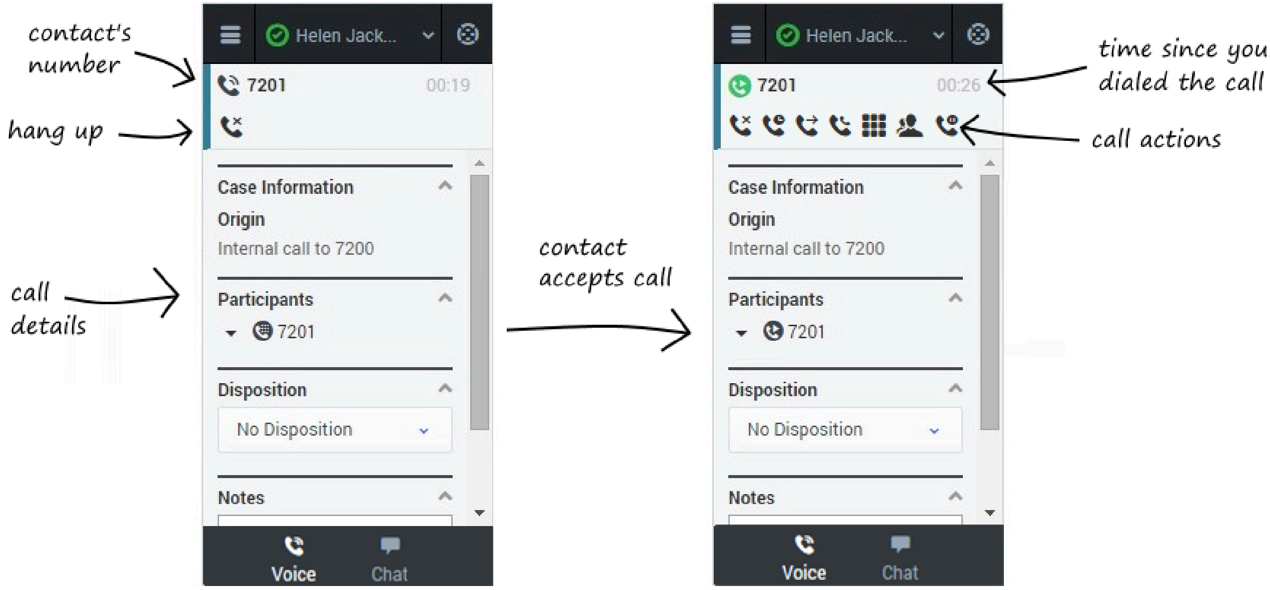
When find a result that you want to contact, just click **Call**  next to the name and your call will start.

Using click-to-dial



With click-to-dial, all you have to do is click a phone number within Salesforce and the adapter automatically dials it and starts the call. For example, you might search for a contact in Salesforce and then click the related phone number.

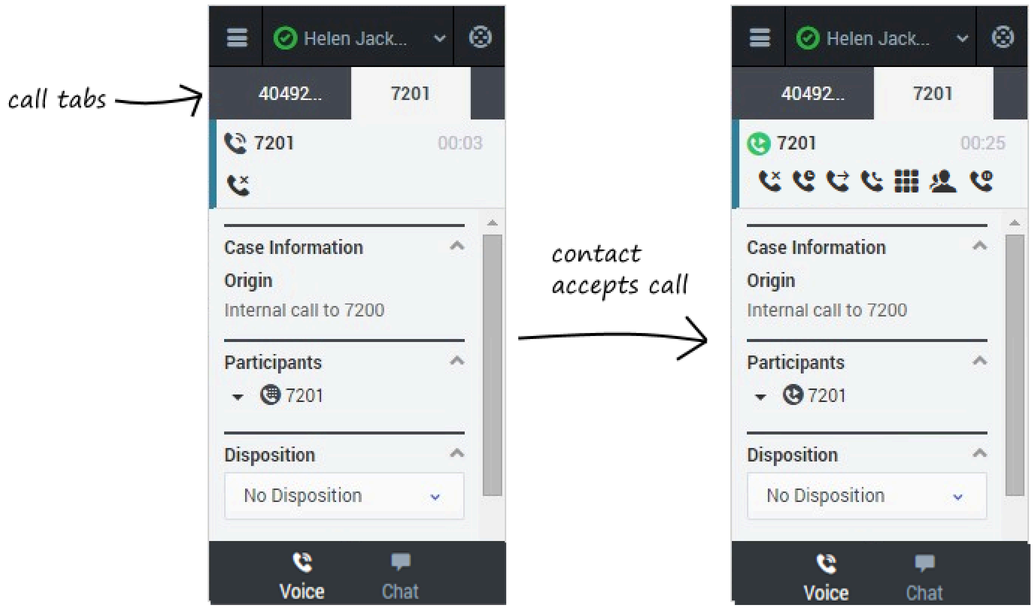
Working with the call



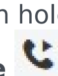
Once you make the call, you'll see two slightly different views as the call transitions from Establishing to Connected. Both views display the call toolbar area and the call details area, which includes sections for Case Information, Participants, Disposition, and Notes.

You can work with the standard call actions, or you can modify the call data by setting the disposition or adding notes about the call.

Dialing another call



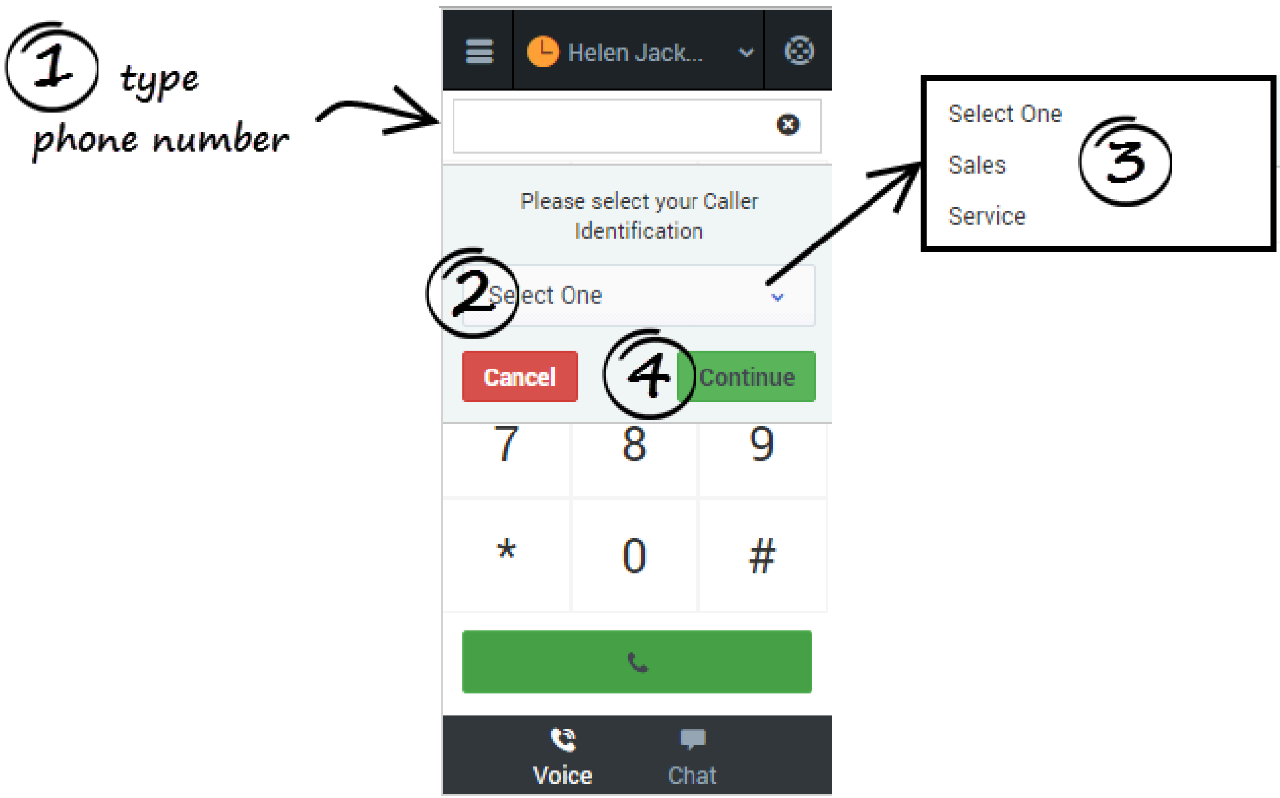
If you're already on a call, you can use the adapter to dial a new call.

When you make another call, the adapter automatically puts your first call on hold. You can go back to your original call by selecting the corresponding tab and clicking **Retrieve**  — this puts your second call on hold. If you have more than two active calls, the rest are displayed in a dropdown list next to the tabs.

Caller Identification for outbound calls (v8)

In some contact centers, the agent must choose the caller id that should be used for outbound calls.

If this feature is enabled for your account, when you make an outbound call, the **Please select your Caller Identification** dialog box is displayed. Select the appropriate Caller ID from the predefined list. This number will be displayed to the person receiving your call. The previous Caller ID that you selected is selected by default. Your system might be set up to enable you to hide the caller ID when you make an outbound voice call. If so, the `Anonymous` ID is included in the `Caller Identification` drop-down menu. Ask your supervisor about when to use this feature.



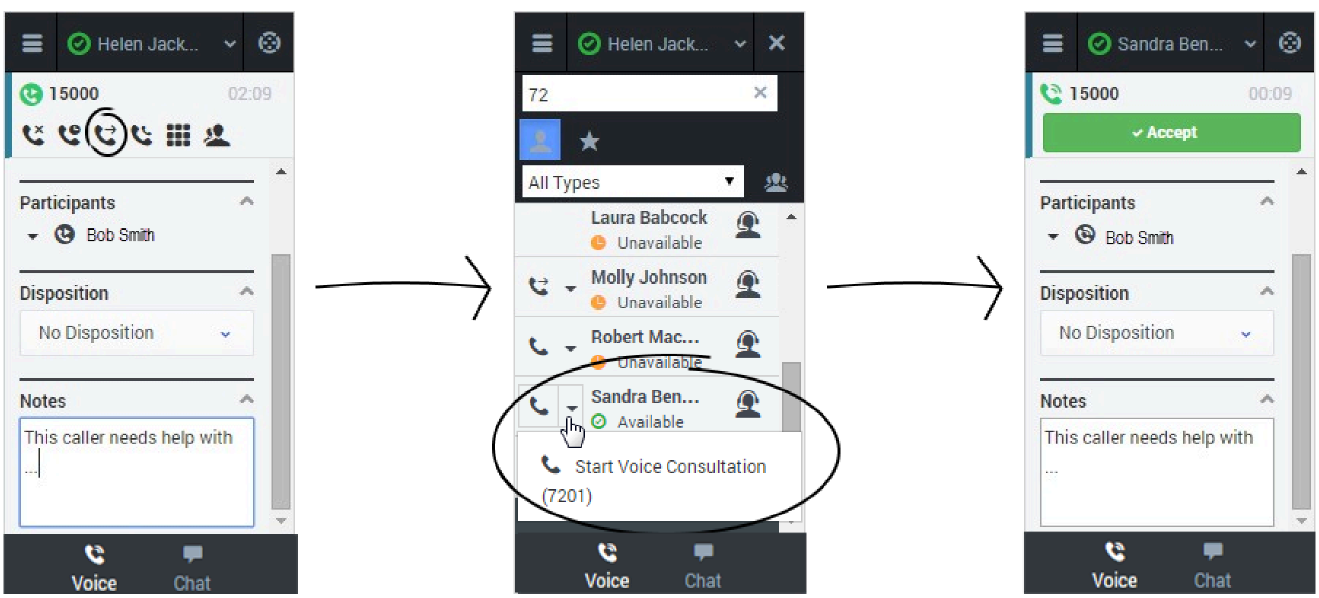
Transfer a call (v8)

When you're on an active call in Gplus Adapter for Salesforce, you can transfer your current voice call to another party. The other party might be another agent that you find by searching for them by name, or by the name of an agent group, a queue, a skill, or a routing point. Your administrator will give you a list of queues, groups, and skills to which you can transfer calls. Agent groups might include a different language, specific product knowledge, or a higher level of security clearance.

All you have to do is click **Instant Transfer**  and choose a contact or enter a phone number in Team Communicator. A green status indicator next to the agent or agent group indicates that there are agents available and your customer will not have to wait long for the transfer to go through.

If you like, you can provide some details about the call in the **Notes** field before you click **Instant Transfer** . When the contact sees the incoming call, he or she will also see your notes in the call details area.

> ## Important
> If your administrator has configured it, the transfer target might also see related information about the active call in Salesforce. For example, if the caller already exists in the Salesforce contact database, the agent might see the Edit Contact screen.

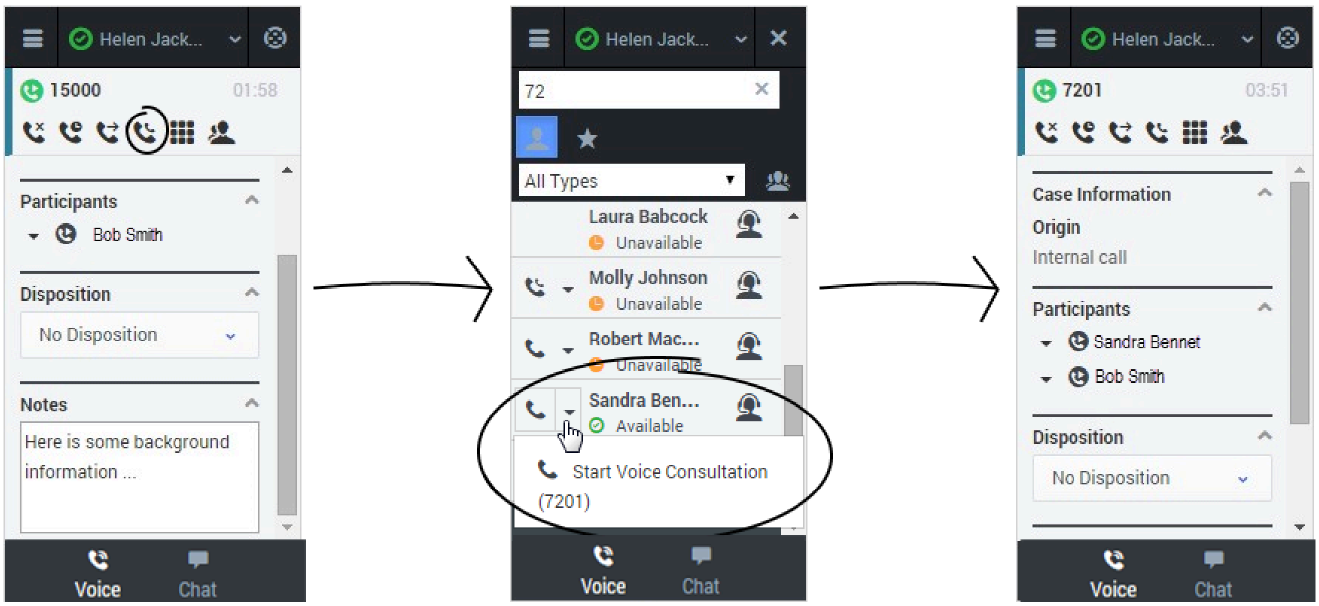


You can also perform consultations where you talk to the transfer target before you transfer the call. See Initiating a Consultation for details.

Conference calls (v8)

When you're on an active call in Gplus Adapter for Salesforce, you can perform an instant conference call with another contact.

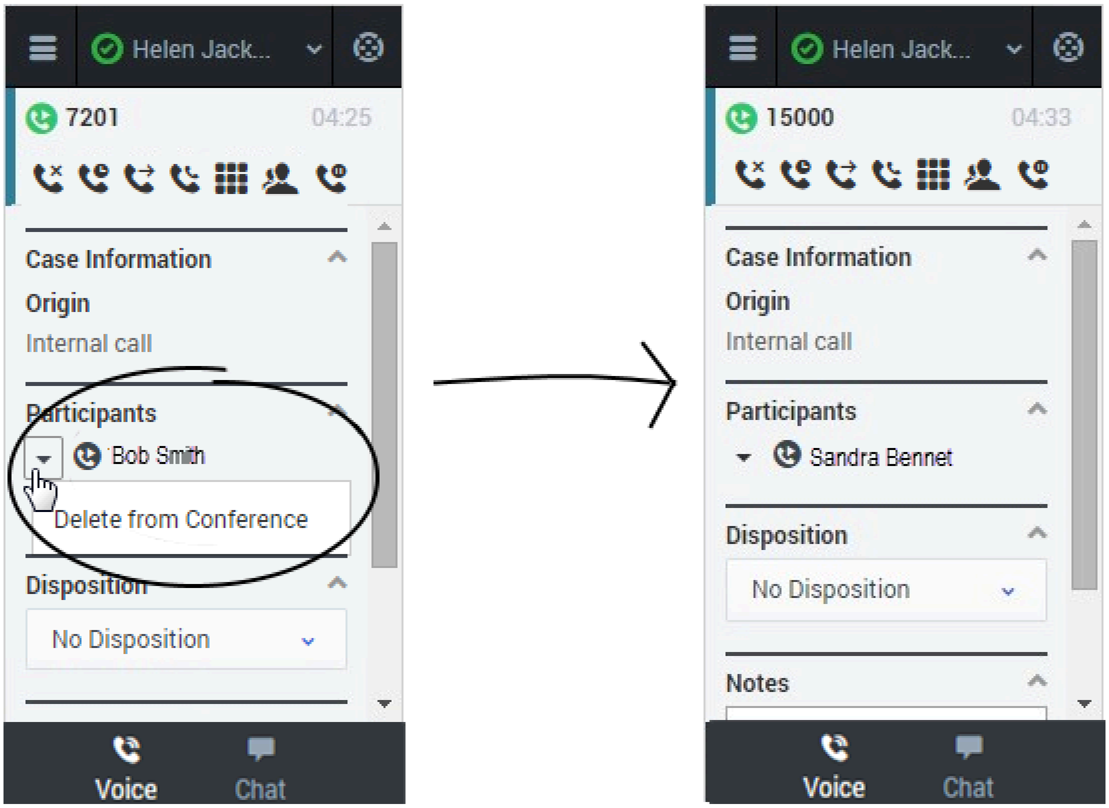
How do I start a conference call?



To start an instant conference, just click **Instant Conference**  and choose a contact or enter a phone number in Team Communicator. A green status indicator next to the agent or agent group indicates that there are agents available and you and the customer will not have to wait long for the conference to go through. If you like, you can provide some details about the call in the **Notes** field before you click **Instant Conference**. When the contact sees the incoming call, he or she will also see your notes in the call details area.

> **Important**
>
> If your administrator has configured it, the conference target might also see related information about the active call in Salesforce. For example, if the caller already exists in the Salesforce contact database, the agent might see the Edit Contact screen.

Once the conference is established, you can see the other parties listed in the Participants section. You can remove a participant by clicking the arrow next to the party you want to remove and selecting **Delete from Conference**.

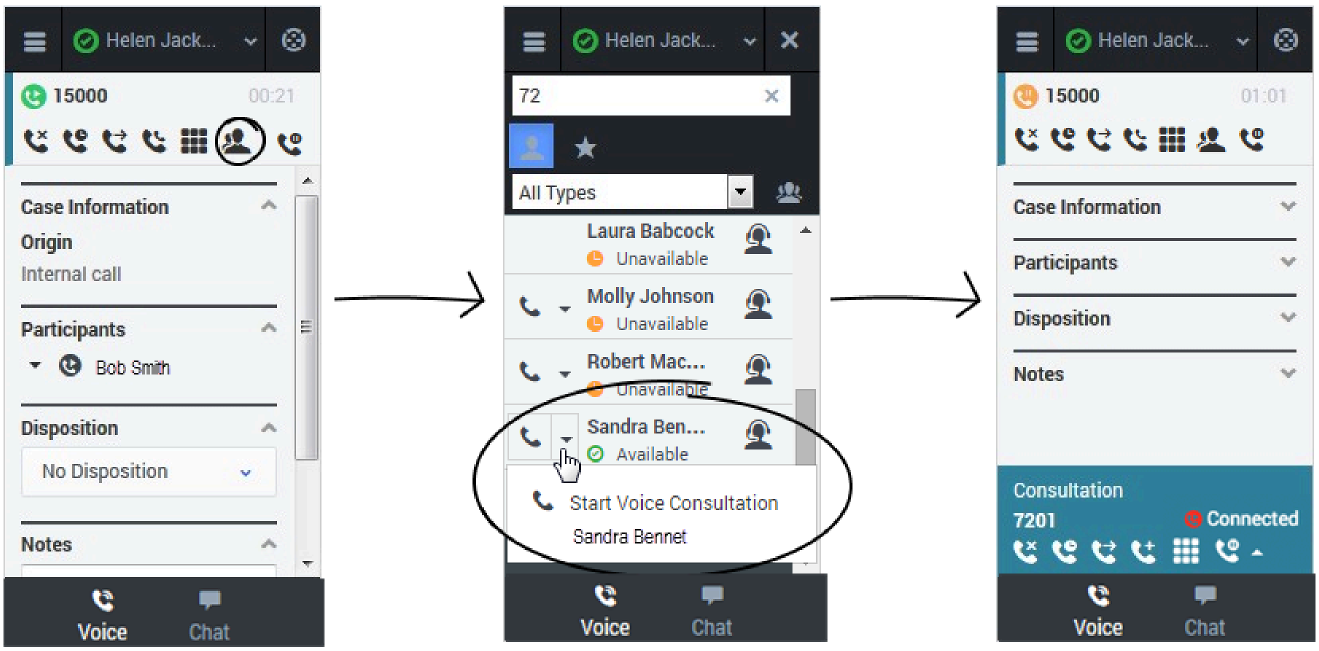


You can also start a consultation and talk with the conference target before performing an instant conference. See Initiating a Consultation for details.

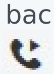
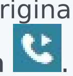
Consultations (v8)

When you're on an active call in Gplus Adapter for Salesforce, you can initiate a consultation with another agent at any time.

How do I start a consultation?



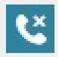
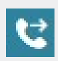
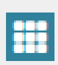
To start a consultation, click **Consult**  and choose a contact or enter a phone number in Team Communicator. A green status indicator next to the agent or agent group indicates that there are agents available and you will not have to wait long to start the consultation. The adapter places your original call on hold and adds a consultation area that includes the consultation call state and a list of consultation call actions.

> **Tip**
>
> You can easily switch back and forth between your original call and your consultation by clicking **Retrieve**  or **Retrieve Consultation** .

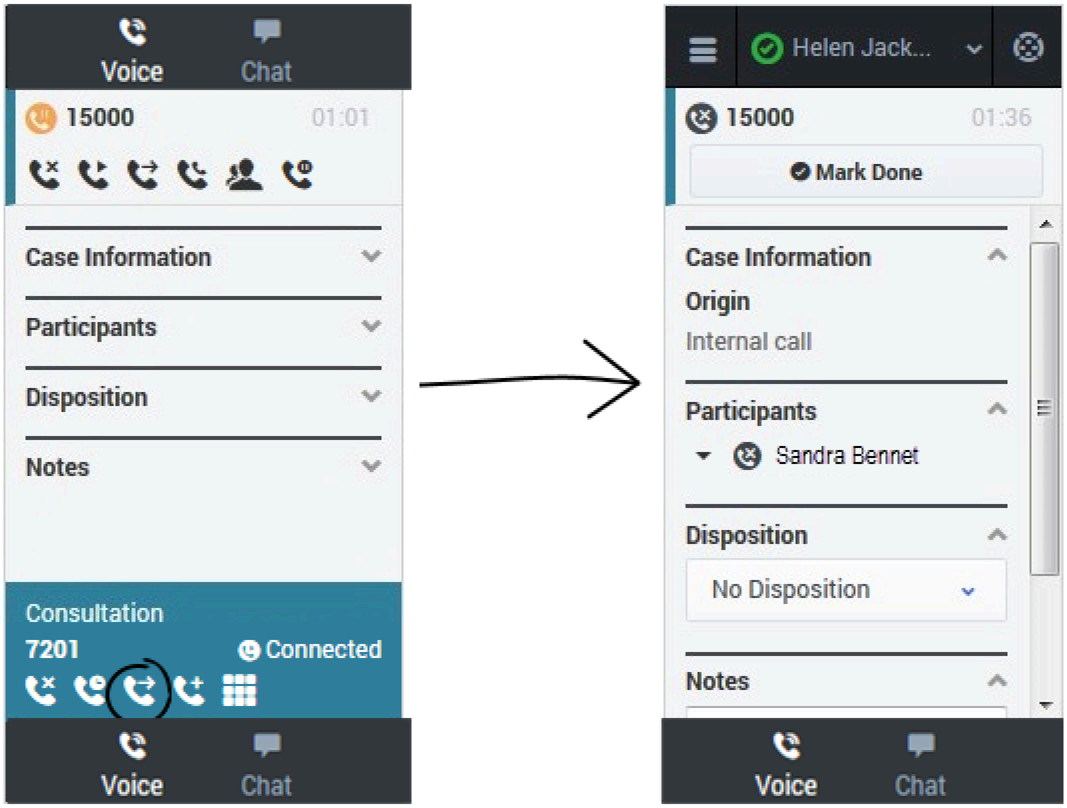
If you like, you can also provide some details about the call in the notes field. This can be helpful if you consult before transferring or starting a conference call. When the target agent sees the transfer or conference request, he or she also sees your notes in the call details area.

When you have an active consultation call, you should see a consultation area with a list of actions you can perform. **Note:** You might not see all of these buttons, depending on how your environment is configured. The following table describes the common buttons you might see in the list:

[+] Show table

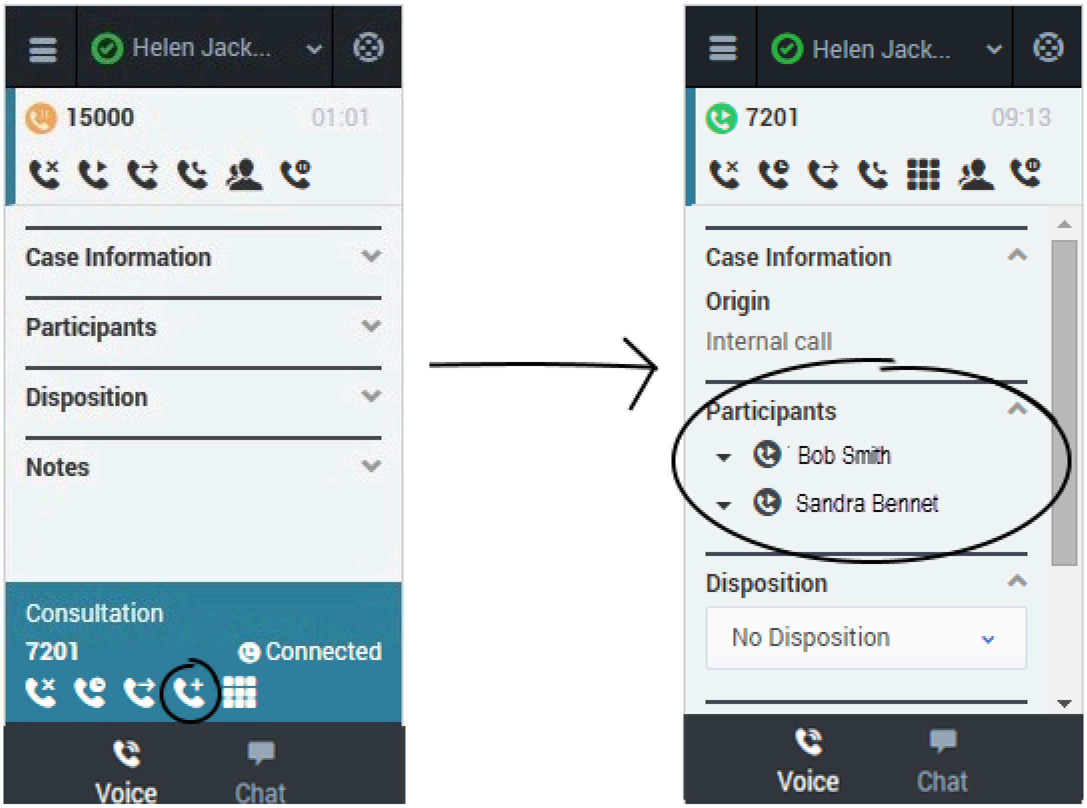
Action	Button	Description
Hang up consultation		Ends the consultation call.
Hold consultation		Places the consultation on hold. If you do this, you'll see a slightly different list of actions with a **Retrieve Consultation** button : 
Complete as transfer		Redirects the call to the consulting agent. See Consult before Transfer for details.
Complete as conference		Starts a voice conference with the current call and the consulting agent. See Consult before Conference for details.
Keypad		Shows the keypad. You can use this to enter digits when you're navigating voice menus or prompts. Type or select the digits and then press Enter on your keyboard. 

How do I transfer the caller to the consulting agent?



You can transfer your original call to the agent you're consulting with by clicking **Complete as Transfer** . This immediately transfers the call to the consulting agent and ends it for you. As usual, you can add call information and click **Mark Done** to finish.

How do I turn my consultation in a conference call?

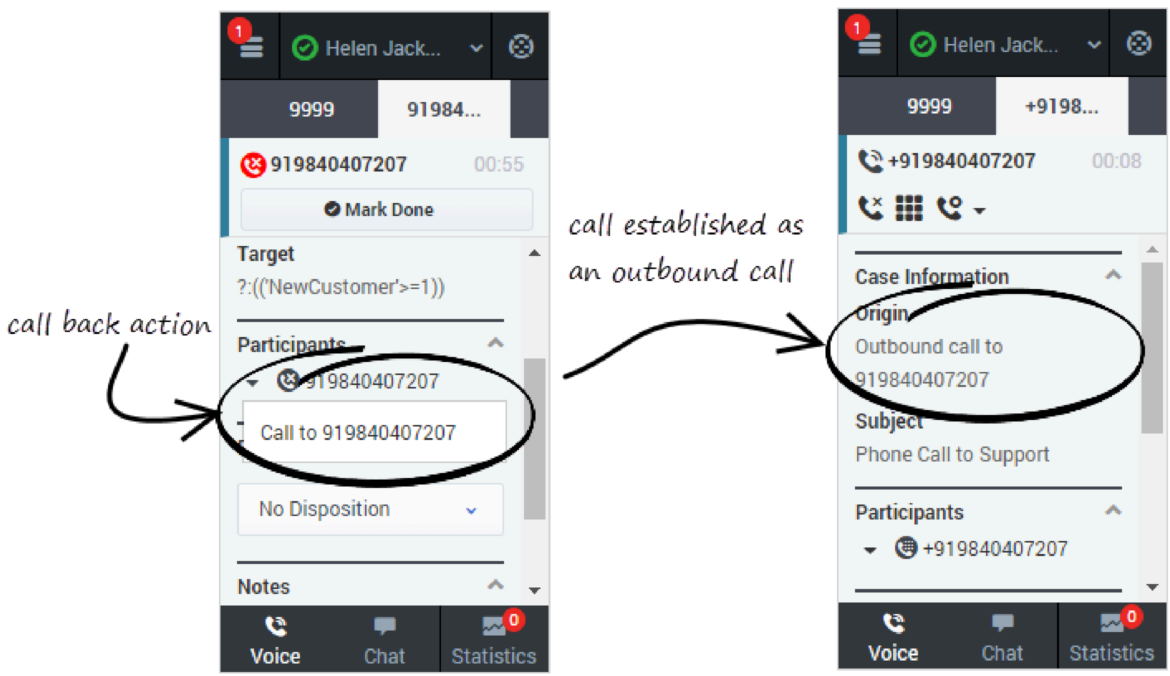


You can initiate a conference call between you, the customer, and the agent you're consulting with by clicking **Complete as Conference**. This immediately retrieves your original call from hold and adds the agent. As with regular conferences, you can remove participants and add call information like disposition and notes.

Call back a disconnected participant (v8)

When you're on an active call in Gplus Adapter for Salesforce, you can call back a participant that is disconnected from the current call.

How do I call back a participant?



To call back a participant, expand the **Participants** drop down list, hover over the disconnected participant contact number, and just click the **Call to** 

action. You can see the call being established as an outbound call in the **Case Information** section.

Once the call is established, you can see the dialed party once again listed in the **Participants** section. For the called back participant, you can perform general call actions such as conference and consultation.

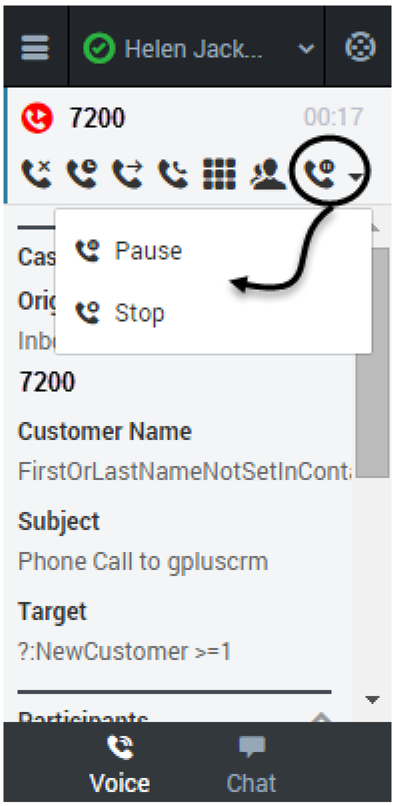
Important

You cannot place a call back for internal calls.

Recording a Call (v8)

The Call Recording functionality enables you to record the current conversation or consultation call with a customer or an internal caller.

How do I record a call?



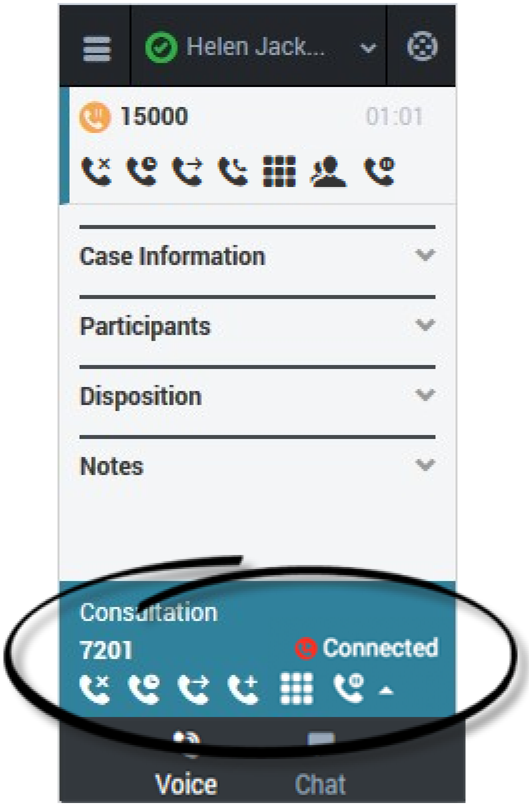
To record a call, you click the **Record** button or choose an action from the drop-down list box. Your call center might be configured to record all calls by default. In this case, you can pause, stop, or restart a recording using the Record options. The following table describes the actions that you can perform:

records the call.After you click the **Record** button, the call status indicator is red . The recording continues until you pause or stop the recording.

stops the recording. After you stop the recording, the call status indicator is green and the

Pause button returns to be the **Record** button. pauses the recording. When you pause the recording, the **Pause** button becomes the **Resume** button.

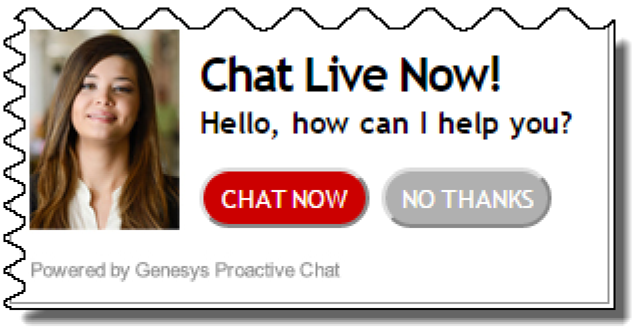
How do I record a consultation?



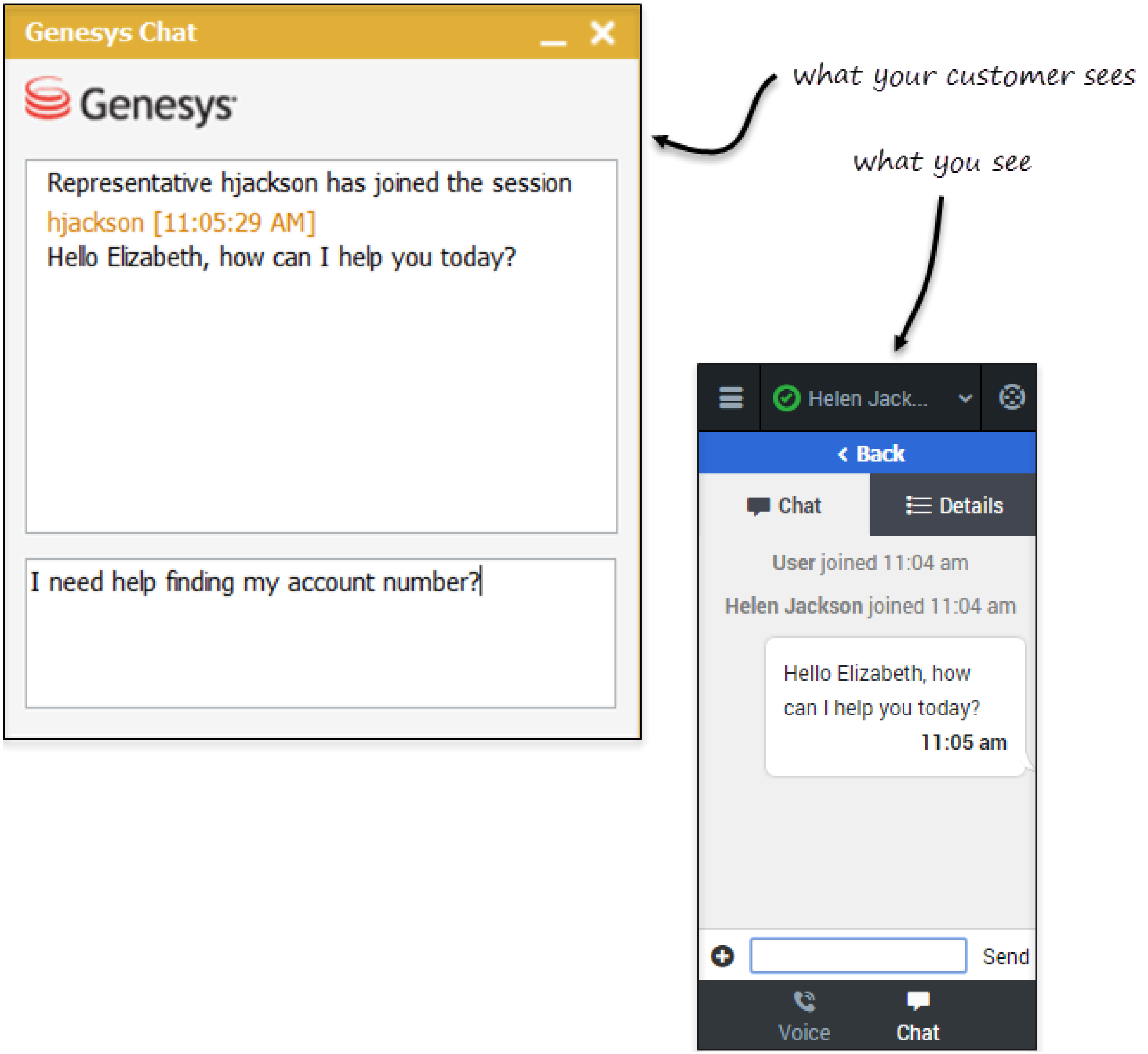
You can also record a consultation. During a voice consultation, look for the controls at the bottom of the adapter.

Working with the Chat channel (v8)

As part of the omnichannel customer experience, customers have the opportunity to chat with a live agent while browsing on your website. This proactive touchpoint with the customer enables him or her to reach out to you for assistance, if needed. The invitation that the customer sees might resemble the following pop-up window:



Chat channel overview

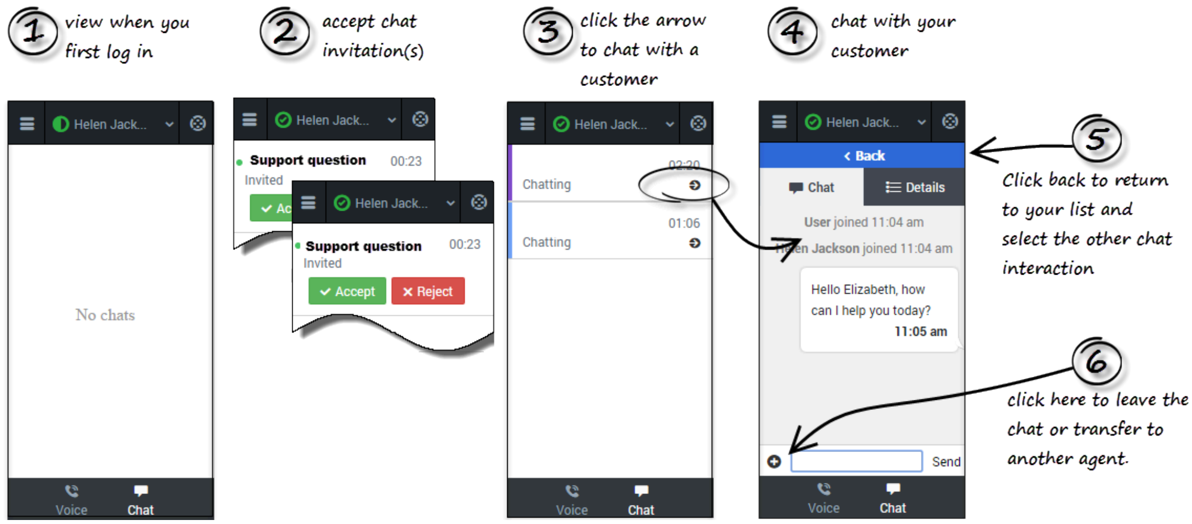


After you log into the adapter and navigate to the chat channel, you'll see the default view where you can accept or reject a chat.

Using the chat channel, you can:

- Chat with a customer
- Manage multiple chat conversations
- Transfer a chat

When you log into the adapter and navigate to the chat channel, you'll see the default view where you can accept chat invitations. At first, your chat list will be empty. After you start accepting invitations, your chat list will include all active chats. To access the chat view for an interaction, select the arrow beside the chat list entry. This displays the chat view in which you can send and receive messages. This view has two main areas: chat transcript and chat details. To access other chat interaction son the list, select the **Back** button to return to the list and select another chat.

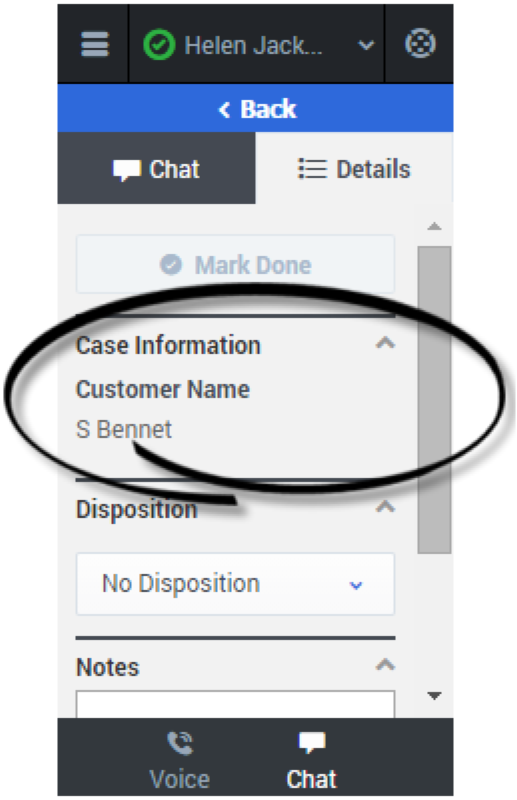


> ## Important
> Regardless of what page you are on in the Chat channel, the **Back** button will always take you back to your list of interactions.

Chat details

The Chat details view shows you all the data the adapter has about the chat, and it provides fields that you can edit to add more information. After you view the details, you can click the **Chat** tab to return to your conversation or click **Back** to return to the main list of chats.

Case Information



The Case Information section shows you read-only information about the chat — the exact information that is displayed is determined by your administrator.

Here are a few examples of some information you might see in your details view:

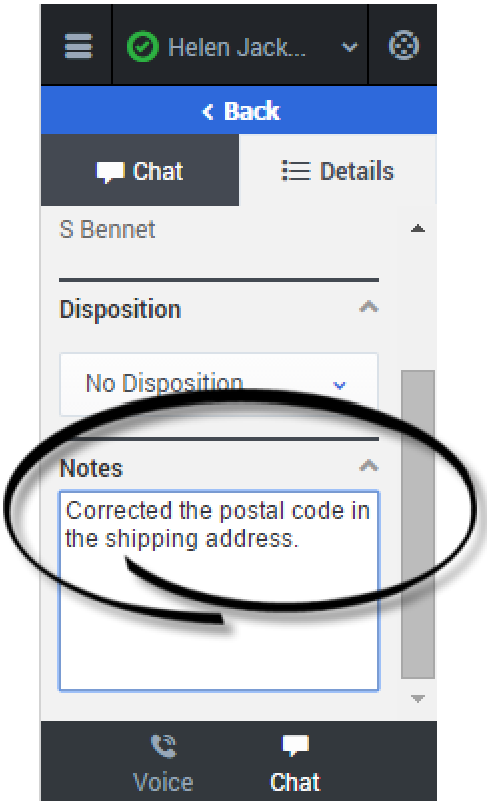
- Origin
- Target
- Contact name
- Call type
- Account information
- Subject

> ### Tip
> For chat interactions, the **Call Type** field shows all chats as Inbound.

Depending how your administrator configured your agent, you might be able to add, edit, or delete case information. For more information, see How do I edit case information?

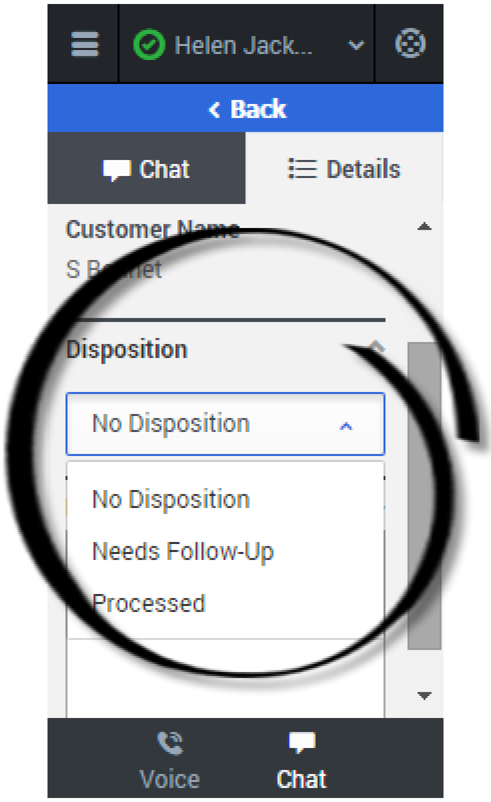
Case information fields might contain a URL that you can click to access more information.

Notes



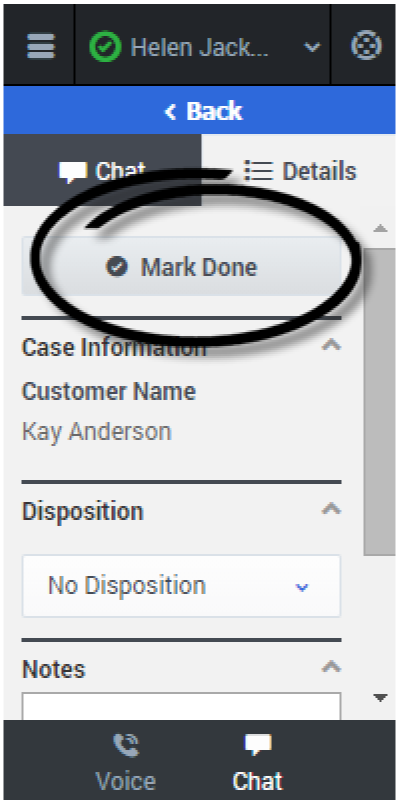
If configured by your administrator, you can add notes either during the chat or as part of your after-call work. To update, just enter your comments in the text field. Ensure that you don't click **Mark Done** first before you add a note. You can't make any further changes after you click **Mark Done**.

Disposition



If configured by your administrator, you can change the disposition for a call either during the chat or as part of your after-call work. You can use this field to record the business outcome of the chat. To update, just click the dropdown list and select a disposition. Ensure that you don't click **Mark Done** first before you select a disposition. You can't make any further changes after you click **Mark Done**.

Finishing a chat



When your chat is over, either because the other party left the chat or you clicked **Leave Chat** , you might need to update some information in the details area (such as Disposition or Notes).

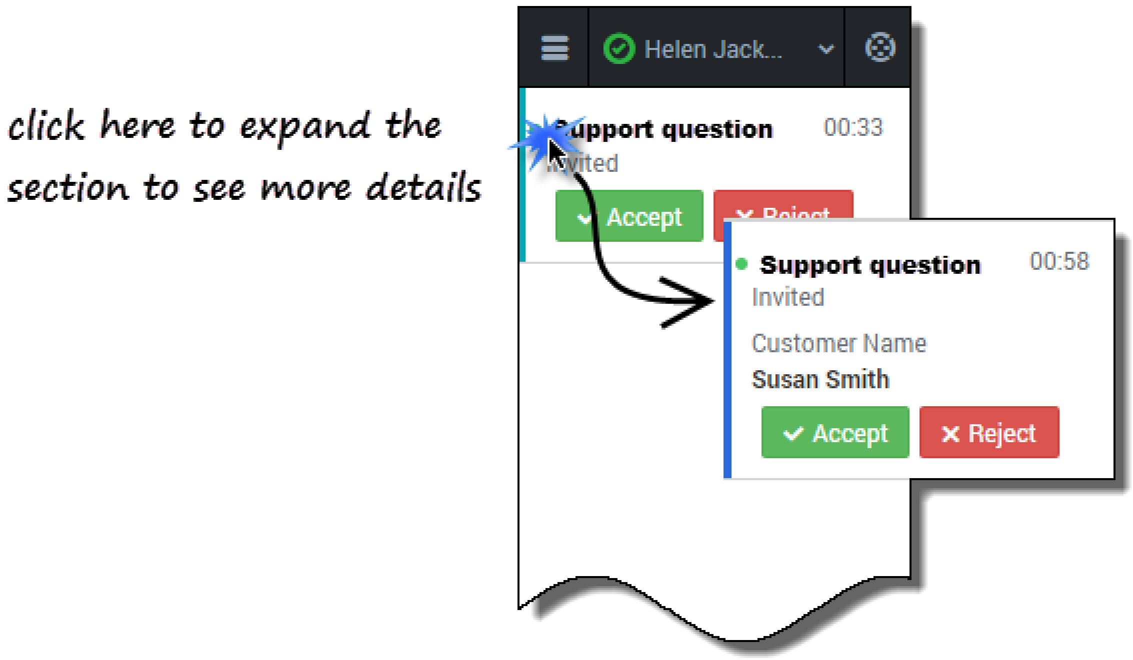
After finishing your after-chat work, you can click **Mark Done**, which completes the chat and sends you back to the main chat channel view. At this time, your status might automatically change to **Ready**, **Not Ready**, or another status, if configured by your administrator; otherwise, you have to change it yourself.

After you mark a chat as done, the chat list is displayed where you can choose another chat to work with.

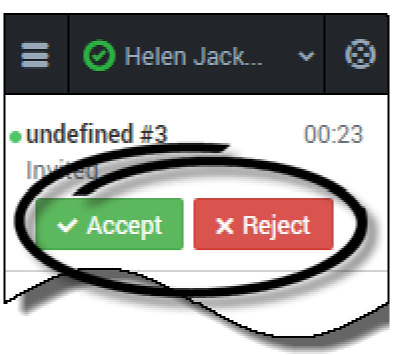
Chatting with a customer (v8)

When you open your chat channel, the main chat view is displayed. Initially, there are no chat invitations displayed. When a new chat interaction arrives, it is displayed in your list. A green symbol is displayed beside each unanswered chat invitation. The symbol goes away after you accept the chat and the status changes to show that your chat is in progress. This view is useful for when you are managing multiple chats.

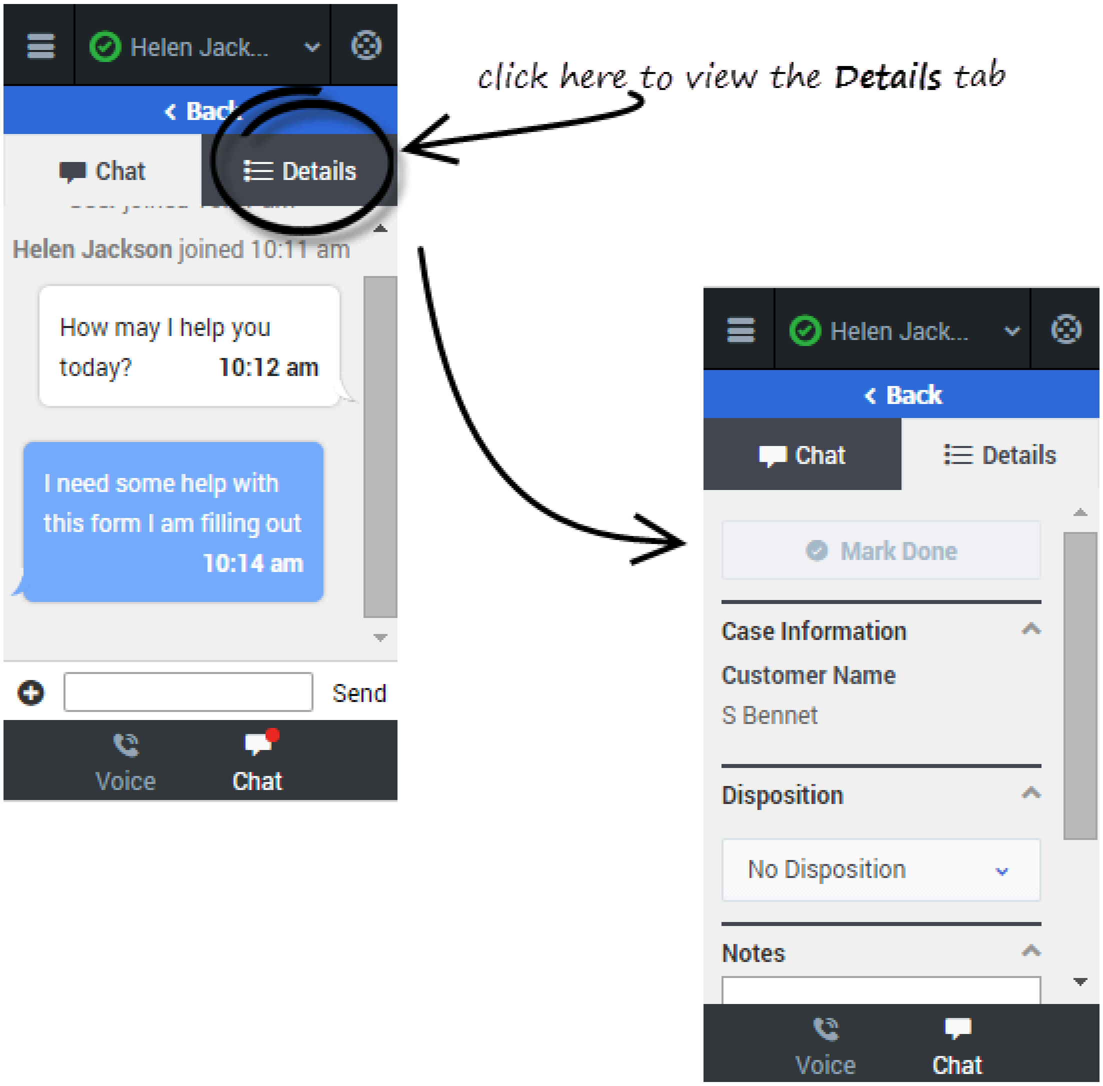
You can click any white space on the invitation to view more details about the chat before you accept or reject it.



You can choose to **Accept** or **Reject** the chat invitation.



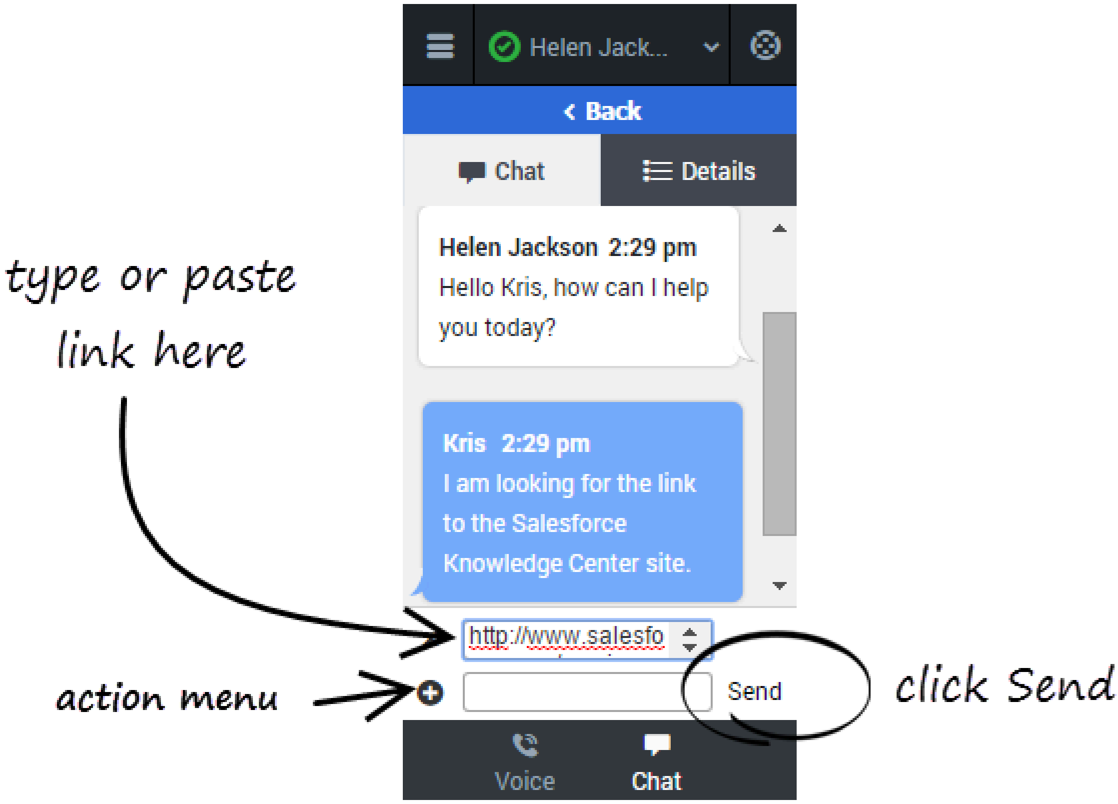
How to conduct a chat



When you accept a chat invitation, the Details view for the chat is opened, you can click the Chat view to chat with your customer. This is where you actively chat with your customer. Chatting is very simple. You just read the messages, and respond by typing text in the text field and then clicking **Send**. You can also click the **Details** tab to view call details.

To conduct a chat, click **Accept** when a new chat invitation arrives. If required, click the **Details** tab to view the call details. Conduct your chat conversation with your customer. When the conversation is complete, click the ⊕ symbol at the bottom of the adapter, and then select **Leave Chat**. On the **Detail** tab, enter your notes, select a disposition, and click **Mark Done**.

How to send a link



While chatting with a customer, you might want to send a link to a website. For example, you can send a link to an application form for a client card or a knowledge center on your support site.

To send a link, click **Send Link**  in the Actions menu. Copy and paste (or type) the Universal Resource Locator (URL) in the URL field above the entry field that pops up. You can also type a message to accompany the link in the text entry field. Then you click **Send**. The Adapter validates the URL and sends the link to your client.

After you send a URL to a customer, the link stays active in the transcript so that the customer can access the link after the call is complete.

> **Warning**
> If your browser is refreshed or closed while you are in the middle of a chat session, the chat session will resume after you log back into the adapter. However, if you are typing a message at the time the browser closes or refreshes, your message will be lost. When you close your browser window, you are automatically logged out the Adapter. All interactions are terminated and do not resume when you log back in again; therefore, ensure that your interactions are complete before logging out and closing your browser window.

Important

If you reject the chat, the chat invitation is no longer displayed on the list and the customer is routed to another agent.

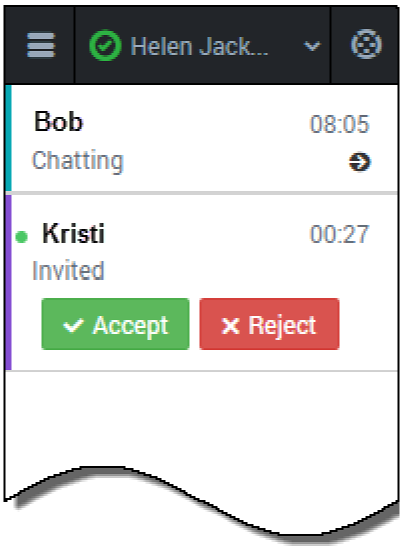
Troubleshooting tip

If the customer leaves the chat before you accept the invitation, a message is displayed in the chat transcript. This message lets you know that the chat is now offline. The only action that you can perform in an offline chat is mark the chat as done.

Managing multiple chat interactions (v8)

The Chat channel features make it easy for you to manage multiple chat interactions. If you have two or more active chat interactions on the go, you can see when you have incoming messages from your other parties and navigate among the chat interactions.

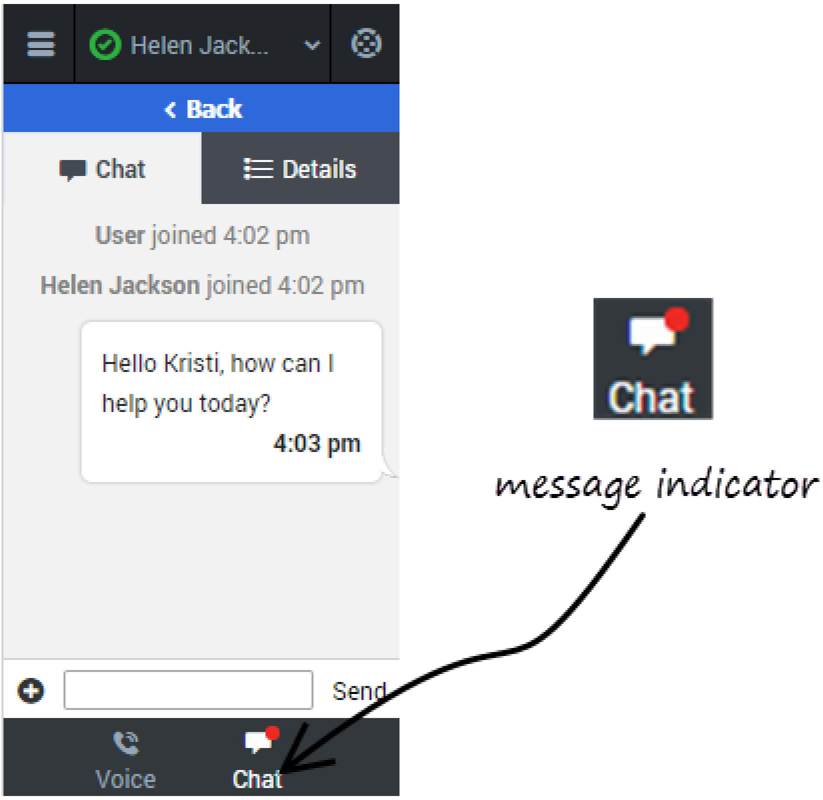
How do I handle two chats at the same time?



Consider this scenario. You are chatting with Bob, a customer who needs your help to complete an online form, when you see a notification on your chat channel icon at the bottom of the adapter. This notification means that you have a message from another in-progress chat or a pending invitation.

Navigate to the main chat list. Notice that you now have two entries on the list:

- Your chat that already is in progress
- A pending chat invitation from another customer



You can accept the invitation and start the interaction with Kristi. Conversely, if you need to focus on your in-progress chat with Bob, you can click **Reject**. The second chat invitation is routed to the next available agent and the entry is removed from your list.

In this scenario, though, let's accept the chat invitation.

After you greet Kristi and start chatting with her, a new message indicator is displayed on the tab header and a red circle is displayed next to Bob's entry on the chat list. Bob responded to your last message.

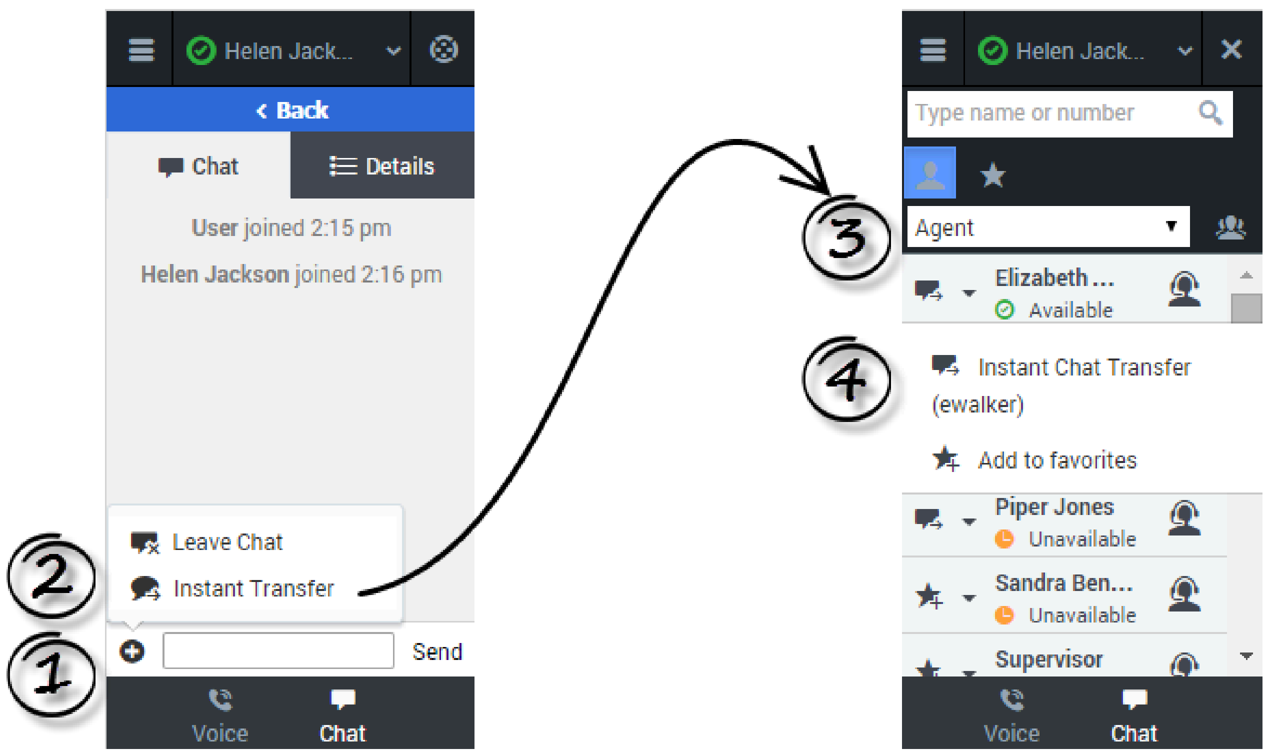
You can click **Back** to return to your chat list, select the arrow next to Bob's chat interaction, and continue chatting with Bob.

In this manner, you can manage several conversations at one time. Remember after each chat is concluded, you must complete the finishing tasks on the **Details** tab and mark the chat as **Done**.

Transferring a Chat (v8)

When you're on an active chat in Gplus Adapter for Salesforce, you can transfer a chat to another agent. Let's say, for example, that your customer has asked you a question on a topic that you are not trained in.

How do I transfer a chat to another agent?



To transfer a chat, click the plus symbol at the bottom of the **Chat** tab. Click **Instant Transfer**. Choose an agent in the Team Communicator. Click the list box and select **Instant Transfer**.

Information transfer

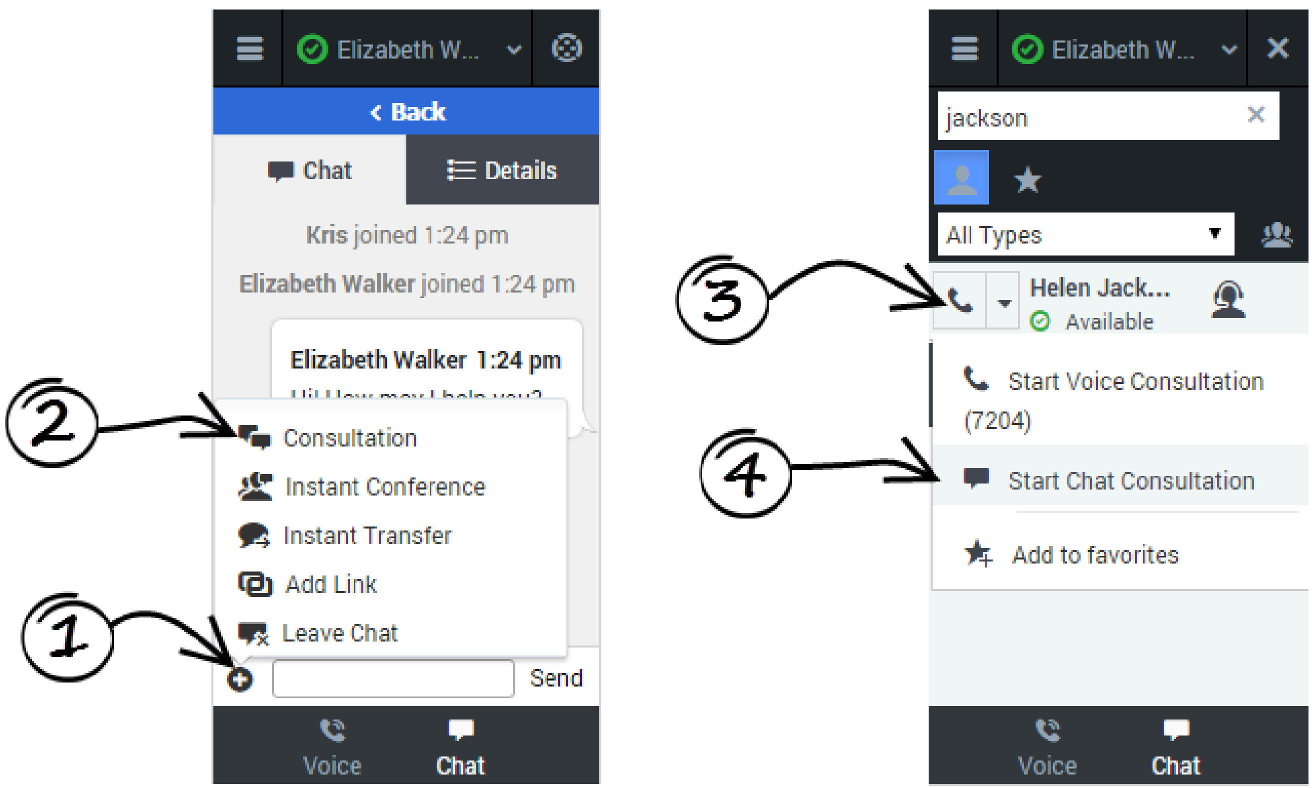
Link to video

If your administrator has configured it, the agent to whom you are transferring the chat might also see related information about the active call in Salesforce. For example, if the caller already exists in the Salesforce contact database, the agent might see the **Edit Contact** screen.

Chat consultations (v8)

When you need support while chatting with a customer, you can use the Gplus Adapter for Salesforce to consult with another agent or supervisor. For example, if a customer asks you a question that you don't know or can't find the answer to, you can open a chat consultation with an agent or supervisor that has the knowledge or skill that you need to complete your chat interaction successfully. If necessary, you can easily start a conference chat with you, the customer, and the other agent, or you can transfer the customer directly to the other agent.

Start a consultation



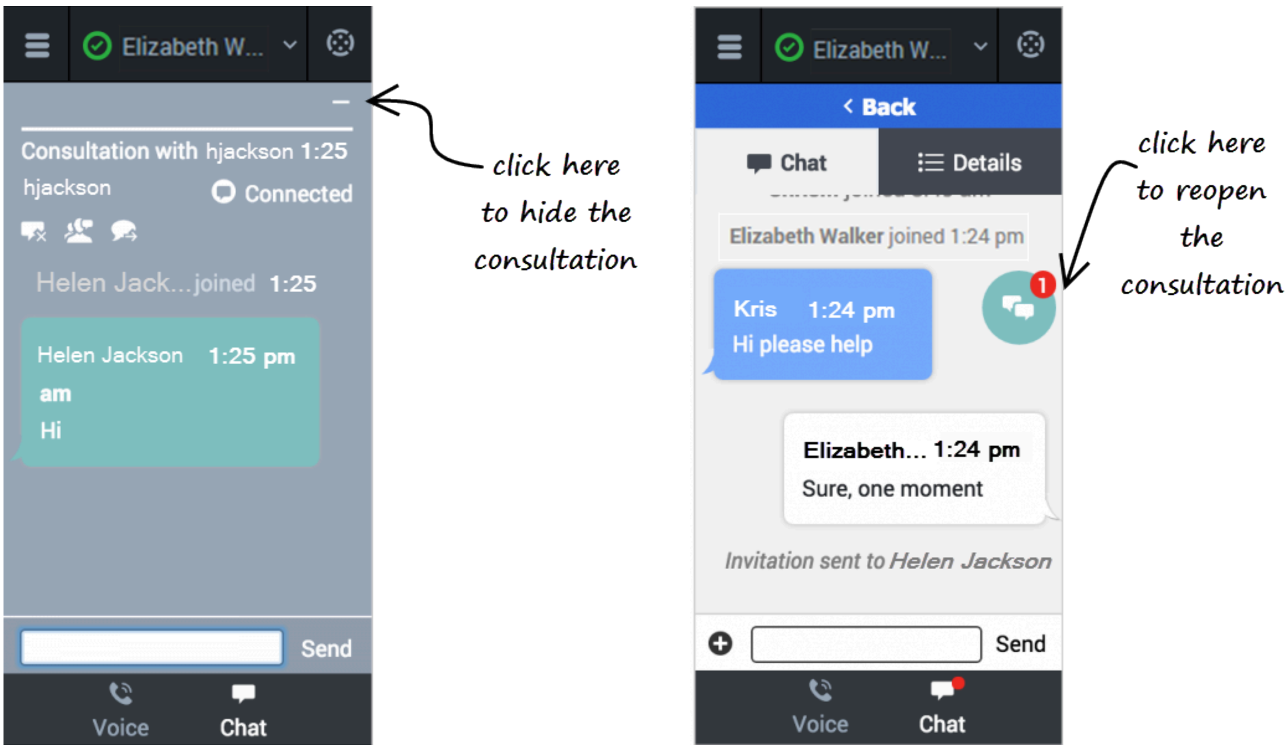
To start a consultation, click **Consultation** on the action menu. After you choose an agent from the Team Communicator and click **Start Chat Consultation**, and the other agent accepts, a collapsible view is displayed over top the current chat view. In this consultation view, you can chat with the other agent. Any text that you type in the consultation view is not visible to your customer.

Let's take a look at the actions that you can take to conclude the chat. You can:

-  —End the consultation, and return to the customer chat.

-  —Complete the chat as a three-way conference. This brings the customer and the agent into the same chat window, allowing for a three-way conversation.
-  —Transfer the chat to the other agent. This concludes your chat with the customer, and the other agent continues.

Managing consultations



You will have chat interactions where you might have several chat views on the go at once. Even in a normal one customer and one agent consultation, you need to manage these multiple screens.

During a consultation, When you need to go back to the customer, click the dash symbol at the top of the view. This collapses the consultation view to a colored bubble. You can place this bubble anywhere on your Adapter by clicking and dragging the bubble. When the consulting agent types a message to you, a notification is displayed on the bubble. For example, if the agent send two messages to you, the number 2 is displayed on the bubble. To return to a consultation, click the chat bubble and the collapsible view is displayed again.

When you have multiple active consultations, each bubble is a different color.

Case Information management (v8)

In the Gplus Adapter, case information can be modified for voice calls and chat iterations. If you see the pencil icon beside a field or the plus symbol at the top of the **Case Information** section, you have the correct access permissions to update case information. Otherwise, contact your administrator or follow your contact center procedures for updating case information. |}

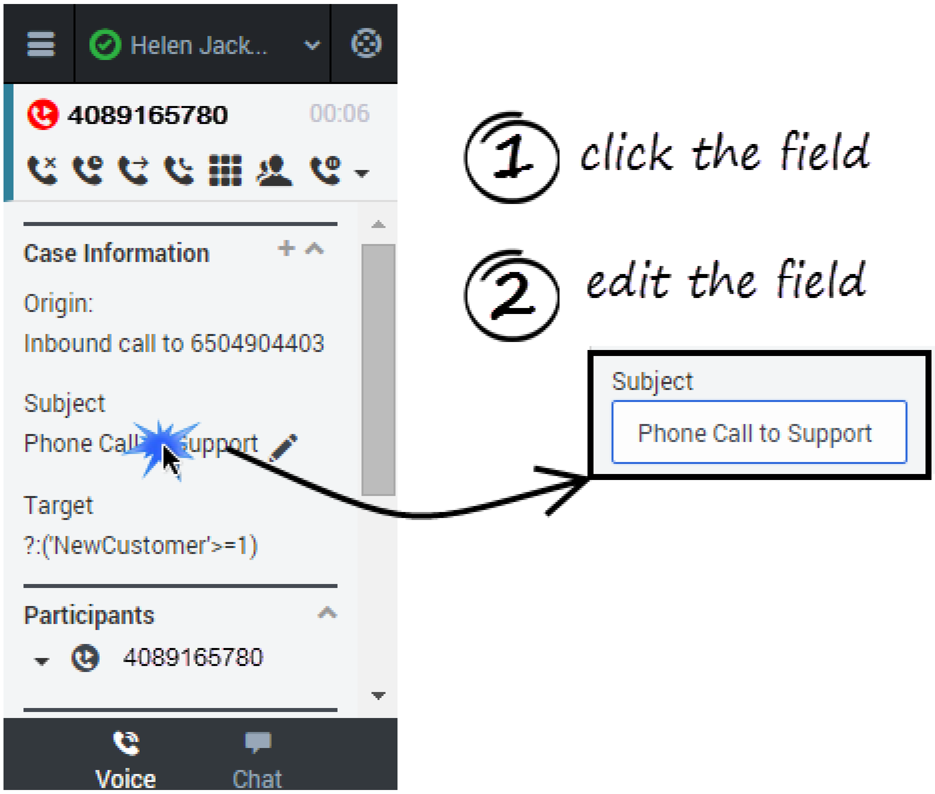
Link to video

Consider this scenario to understand why you would update case information. A customer calls your call center to update details on their account. While talking with your customer you realize that his last name is spelled incorrectly in the contact name field. You can easily correct the spelling error. Many other scenarios could happen such as a complete name change, an update to the reason for calling, or a change in account number.

If you have permission, you can manage the case information in the following ways:

- Edit fields to update the contents of the field.
- Add additional fields to the case information.
- Delete unnecessary fields.

How do I update a Case Information field?

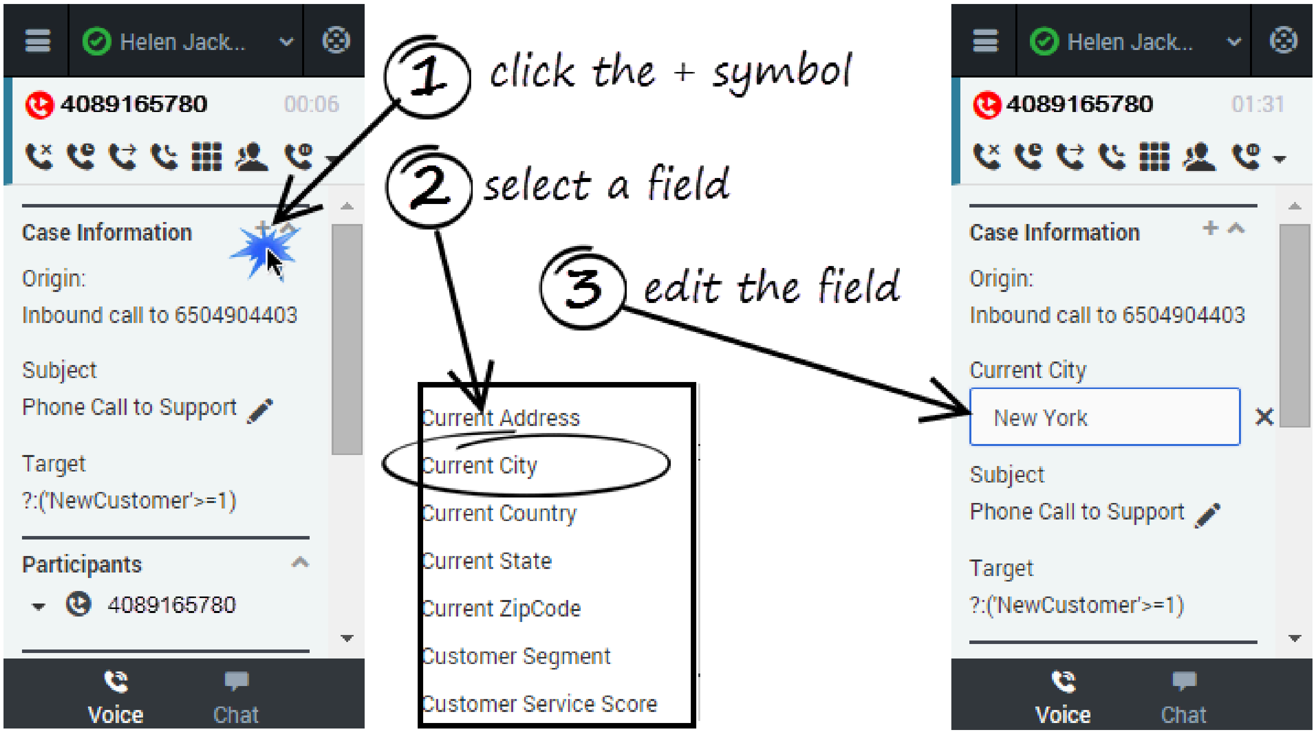


To edit case information, select the field that you want to edit. A text field, a selection drop-down list, or a calendar displays depending on the type of case data.

Each type of field has validation criteria to ensure that you enter the correct information. This prevents you from typing an invalid character or exceeding the maximum number of characters. For example, if you have to enter a credit card number, the field might only allow certain numbers for a particular type of credit card.

If your edit does not match the data validation criteria for the field type, an error icon displays to tell you that you must correct your entry.

How do I add and delete Case Information fields?

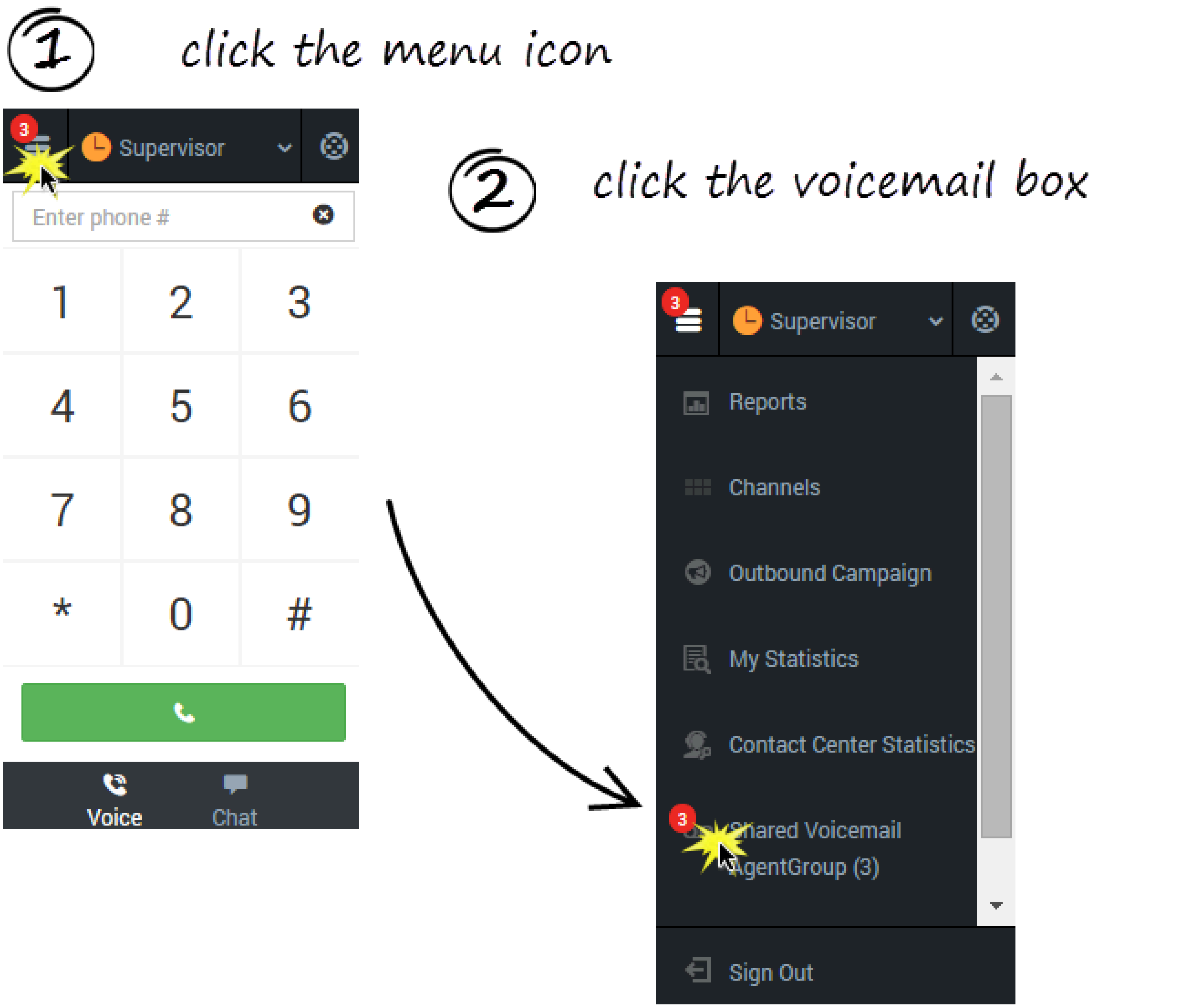


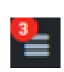
To add a field to the case information, click the plus symbol (+) and select an option from the list that displays. After you add the field, you can edit the case information.

The types of fields you can add depend on what your administrator configured for your contact center. For example, you can an additional field to indicate a preferred language.

To delete a field, click X icon to the right of the field.

Voicemail (v8)

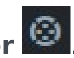


If a red circle with a white number is displayed on the main menu  button, you have voicemail waiting for you. Click the button to view a list of your voicemail boxes.

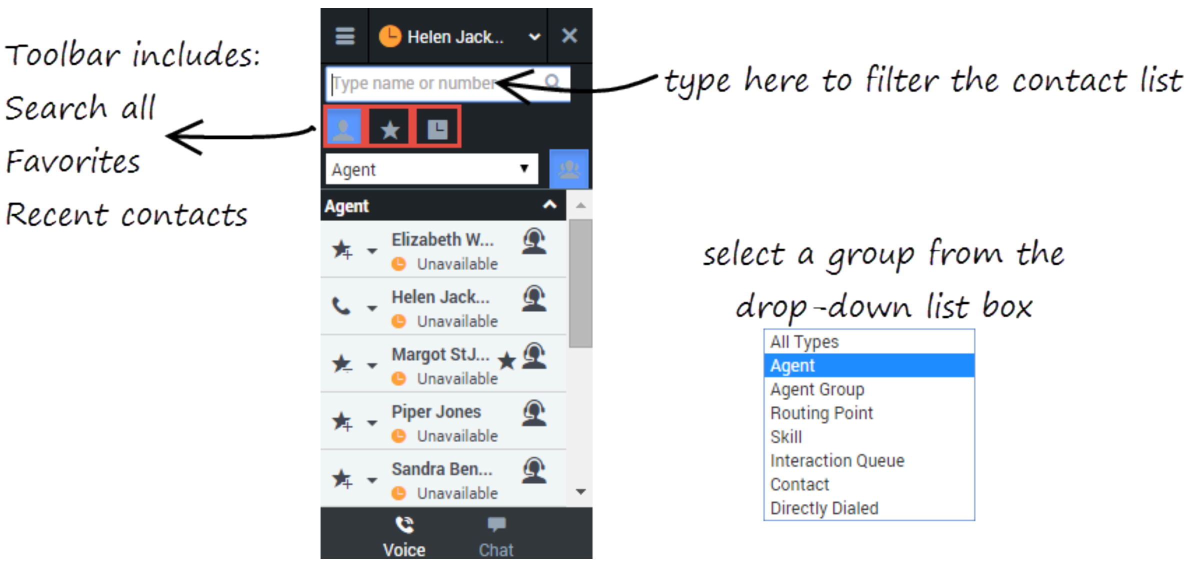
You have a personal voicemail box and possibly a group voicemail box associated with the agent group you belong to. Your mailboxes are only displayed when you have at least one message in the mailbox. When you do have mail, the number of messages in each of your voicemail boxes is displayed beside the name of the voicemail box. Select the voicemail box to open it and listen to your voicemail. The main menu automatically collapses when the voice mail box is selected.

Contact management (v8)

When you need help to resolve a customer issue or you need to transfer the call, use the Team Communicator to locate the contact you need to reach. You can also use the Team Communicator to initiate a call. The contacts in the Team Communicator are already set up for you to use; however, you can add contacts and mark contacts as favorites. After you learn how to navigate the Team Communicator, you should be able to locate your contacts quickly and reduce the amount of call time you use to search for contact.

To open the Team Communicator, click **Team Communicator** .

Find a contact



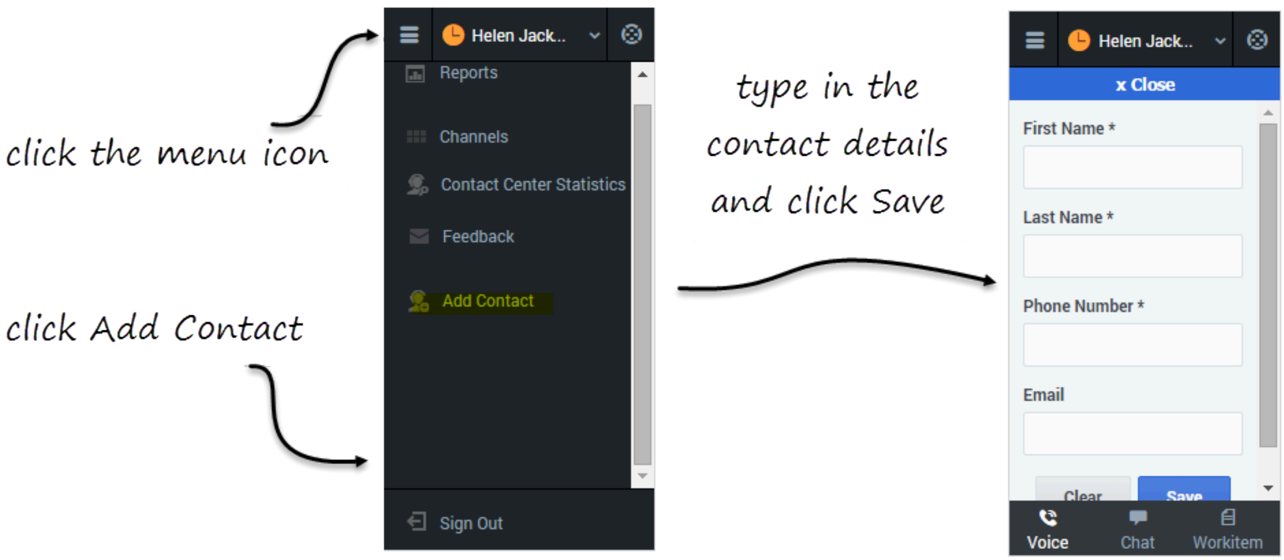
The Team Communicator provides several ways to find a contact.

- Type a name or number in the text field to filter the contact list. The contact list filters the list for you as you type, even if you only type part of a name. For example, if you want to locate the contact for Sandra, you can type San and the list shows all contacts with San in the name.
- The toolbar enables you to:
  - —List all contact types
  - —List your personal and corporate favorite
  - —List recent contacts

- The drop-down list box enables you to display categories of contacts, such as agent groups, routing points, skills, and other such groupings.

Favorite contacts have a star  next to the contact name. Corporate favorites are contacts that marked as favorite by an administrator for use with all agents in your agent group or contact center.

Adding a new contact



Sometimes, you might need to add contacts to your contact list. For example, you can add an external contact.

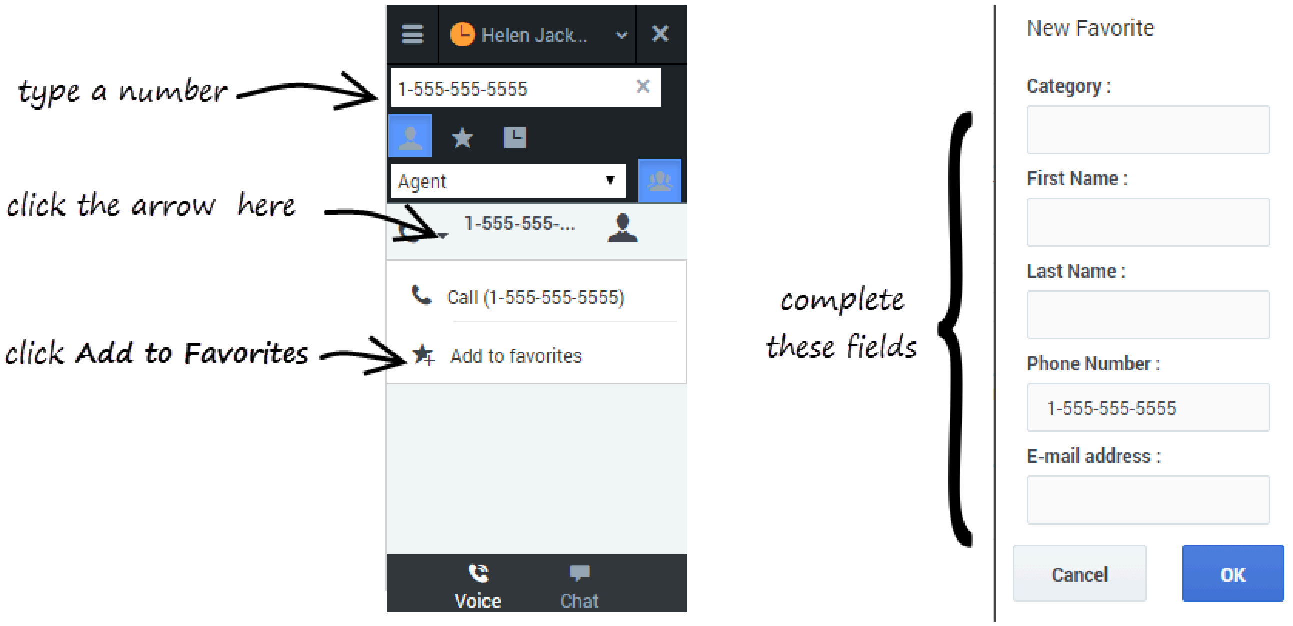
Open the **Add Contact** panel from the main menu and fill out all mandatory fields and the email address. After you click **Save**, a confirmation message is displayed.

Tip

Ensure that you give your contact a unique name. If you have two more entries with the same name, it will be difficult for you to pick which one to call. If you have more than one contact name with the same name, consider appending the last name. For example: John Smith (cell) and John Smith (office).

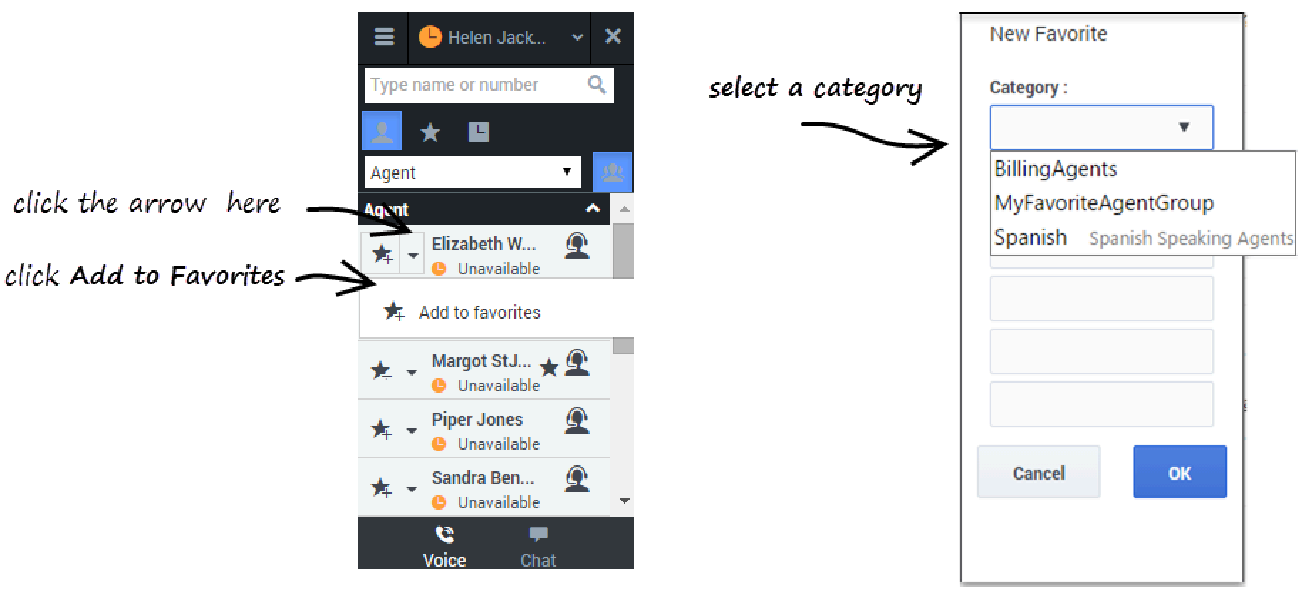
You can further verify that the contact was saved by opening the Team Communicator and typing your new contact's name in the search bar. The contact should appear in the list of results.

Add a new contact as a favorite



When you type a phone number in the Adapter, the Team Communicator recognizes whether the number is already in your contact list or not. If the typed number isn't already a contact, a new entry is added to the contact list. Click the drop-down menu next to the number and select **Add to Favorites**.

Mark an existing contact as a favorite



If you find yourself calling the same contact frequently, you can add the contact to your favorites list. Select the contact that you want to mark as a favorite, click the drop-down menu next to the number, and select **Add to Favorites**.

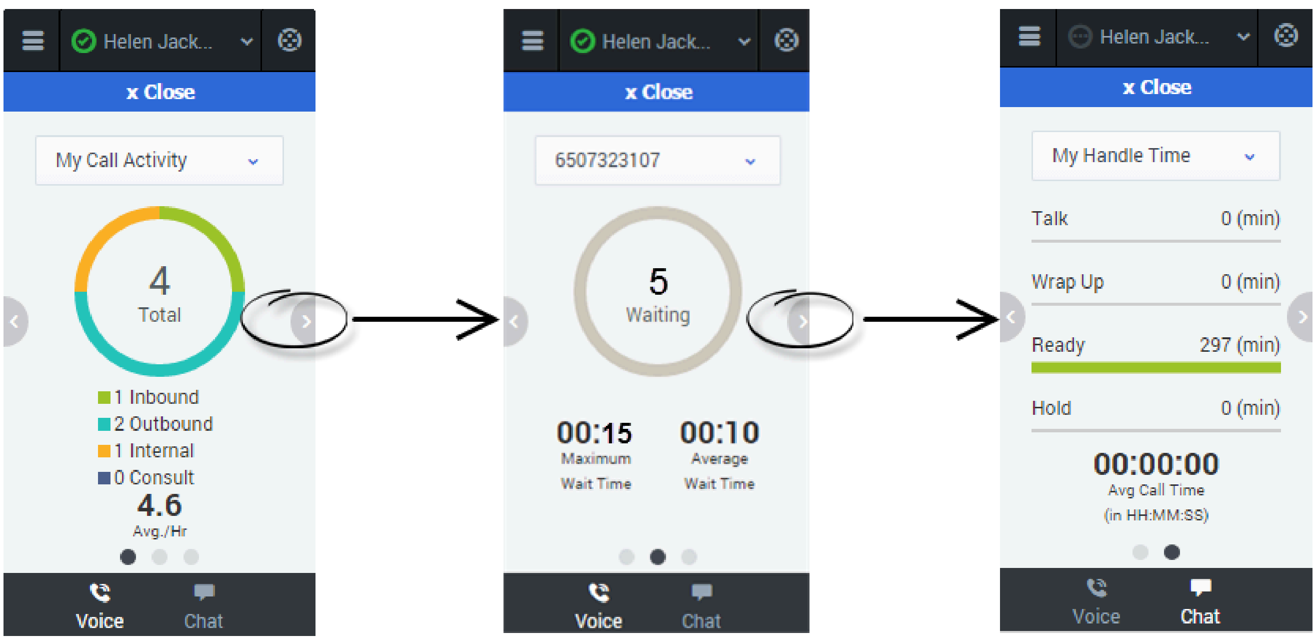
Viewing your reports (v8)

While you are working in the GPlus Adapter for Salesforce, you can view reports and statistics at any time. This information is important for you to see so that you can gauge the call wait times and monitor your Key Performance Indicators (KPIs).

> **Important**
> Reports are only available to you if Dashboards are enabled in your contact center. To enable this feature, you can log a care ticket .

Reports and statistics are available to you through the main menu. You can access the following adapter views:

Reports view

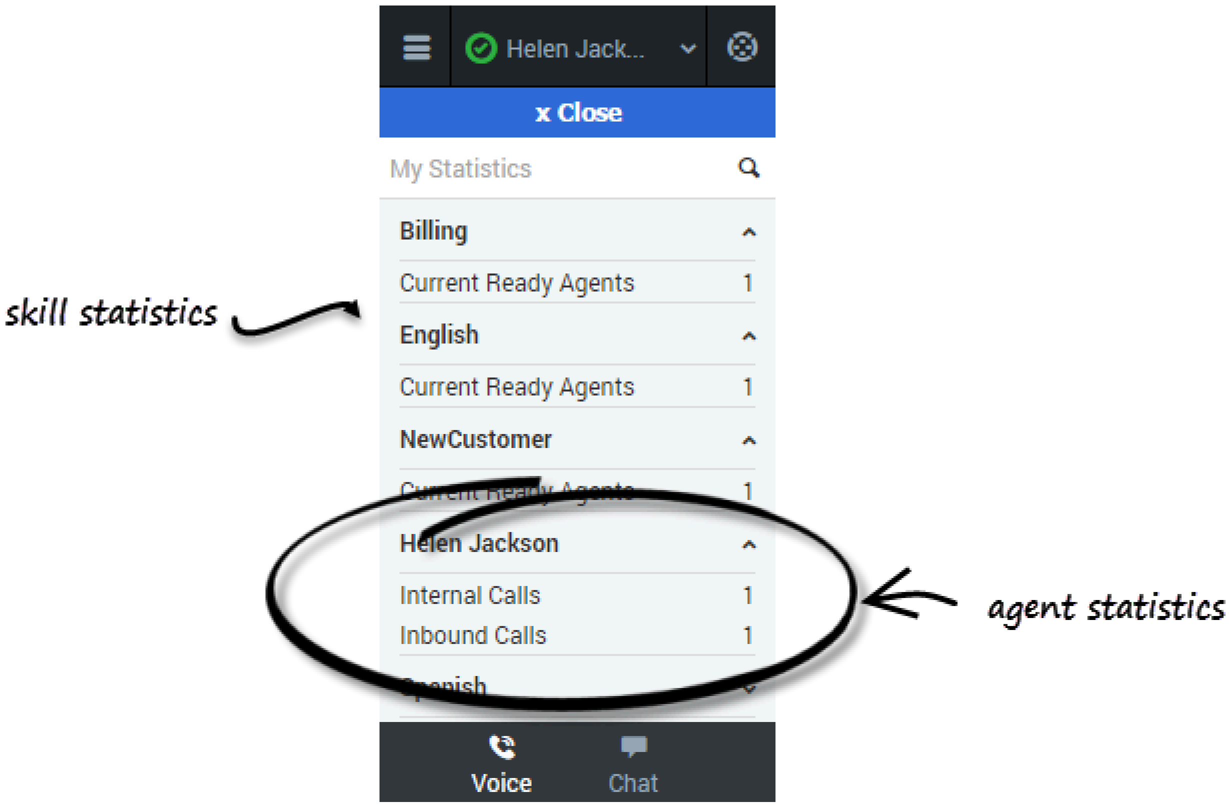


The Reports view for voice interactions displays two pages: **My Call Activity** and **My Handle Time**. To navigate between the pages, use the arrows on the left and right side of the adapter.

- On the **My Call Activity** page, you can view a diagram that represents the averages of calls per hour and call time. Call Activity metrics include Total calls, Inbound calls, Outbound calls, Internal calls, and Consult calls.

- On the queue statistics page, you can select a queue from the drop-down list and see corresponding statistics such as the number of calls waiting, the maximum wait time, and the average wait time.
- On the **My Handle Time** page, you see metrics (in minutes) for Total time, Talk time, Wrap Up time, Ready time, and Hold time.

My Statistics view



The **My Statistics** page of the adapter displays the list of your statistics, otherwise known as Key Performance Indicators (KPIs).

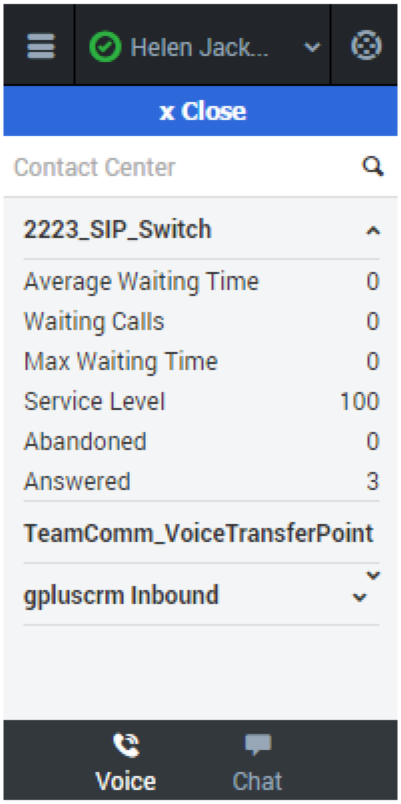
You can access the My Statistics page from the main menu at the top corner of the adapter. The statistics that you see depend on how your administrator has set up your account. For example, you might see agent statistics, skill statistics, and queue statistics. If your adapter does not include a My Statistics option on the main menu, your administrator might not have added any statistics to your agent account. In this case, contact your administrator.

You can expand sections by clicking the arrows next to the section title.

You can also type a value into the search field to filter the list of statistics that are displayed.

Note: Statistics about the Routing Points, Queues, and so on, are displayed in the Contact Center Statistics tab.

Contact Center Statistics view



The Contact Center page on the adapter displays a summary of your Routing Point metrics, which might include:

- Average Waiting Time
- Waiting Calls
- Max Wait Time
- Service Level
- Abandoned
- Answered

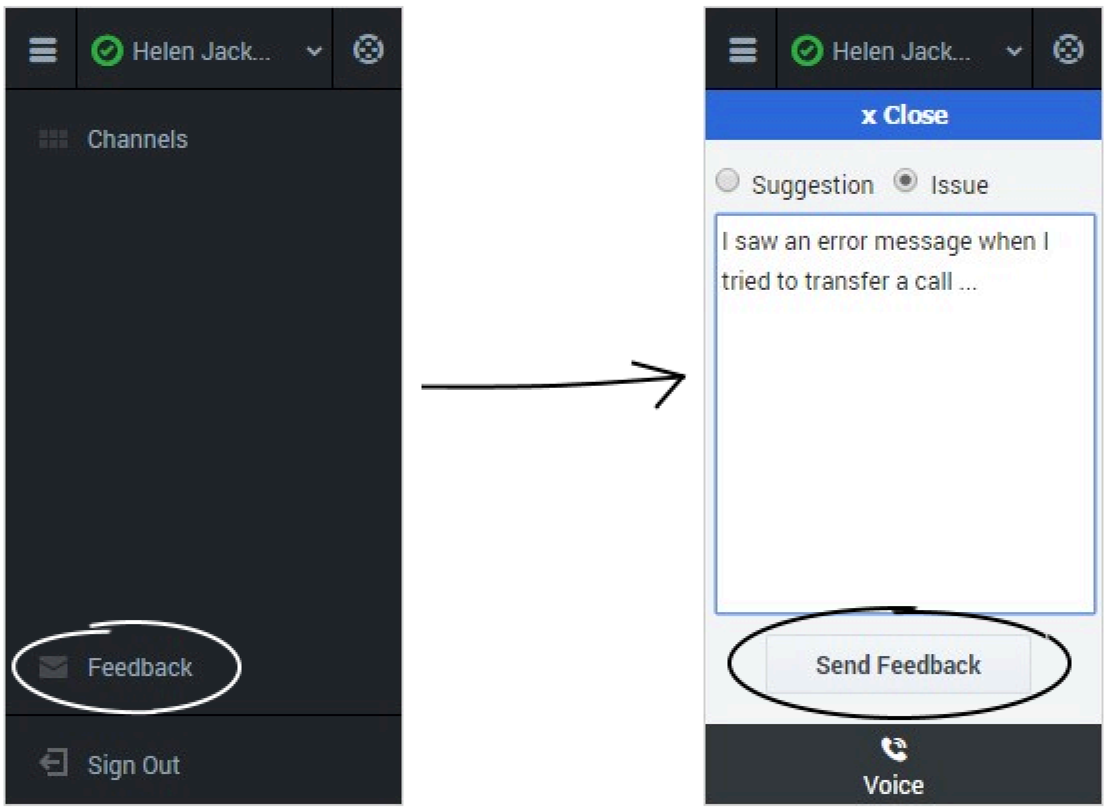
Your adapter might display more, or fewer, metrics depending on how your administrator has set up the Contact Center Statistics view.

You can also type a value into the search field to filter the list of statistics that are displayed.

Submitting feedback (v8)

Sometimes web-based applications don't work as expected. There might be network connection issues, or the system that sends you phone calls and chats might be slow or behaving in odd ways. Sometimes the sound quality of a phone call is bad. Sometimes an error message is displayed on your desktop. These and other issues are problems that you should report to your supervisor.

How to provide feedback when something goes wrong



Open the **Help** menu and select **Feedback** to open the **Feedback** window. Choose the type of feedback that you want to give, either a suggestion or to report an issue, describe the problem or suggestion by typing in the text box, then click **Send** to submit your feedback. This information, along with logs about what you were doing in your most recent Agent Desktop session, are sent to Genesys and are available to Customer Care for later reference.

If for some reason the adapter becomes disconnected from your network and you have to close your browser and launch a new one to log in again, the adapter automatically opens the **Feedback** window to let you write a report about the disconnection problem immediately.

After you complete a feedback report, please tell your supervisor about it. He or she might want to call Genesys Customer Care about the problem and will be able to refer to the feedback you just submitted.

Gplus Adapter for Salesforce - Agent Desktop option (v8)

Agent Desktop, when deployed as an embedded application in Salesforce Console, is an interaction management console that provides you with a robust subset of features that are available in the full Agent Desktop. This product adds more functionality to your softphone and seamlessly integrates the adapter activity in your sales or service console.

How do I access the Agent Desktop console?

Link to video

If Agent Desktop is configured in your sales or service console, you will see a **Workspace** icon at the bottom right corner of your screen. Depending on how your console is configured, the **Workspace** icon might appear elsewhere on the screen.

If your sale or service console is configured for single sign-on, you don't need to log in into your Gplus Adapter. When you launch the adapter, you should have immediate access. If your console isn't configured for single sign-on, you are prompted to log in.

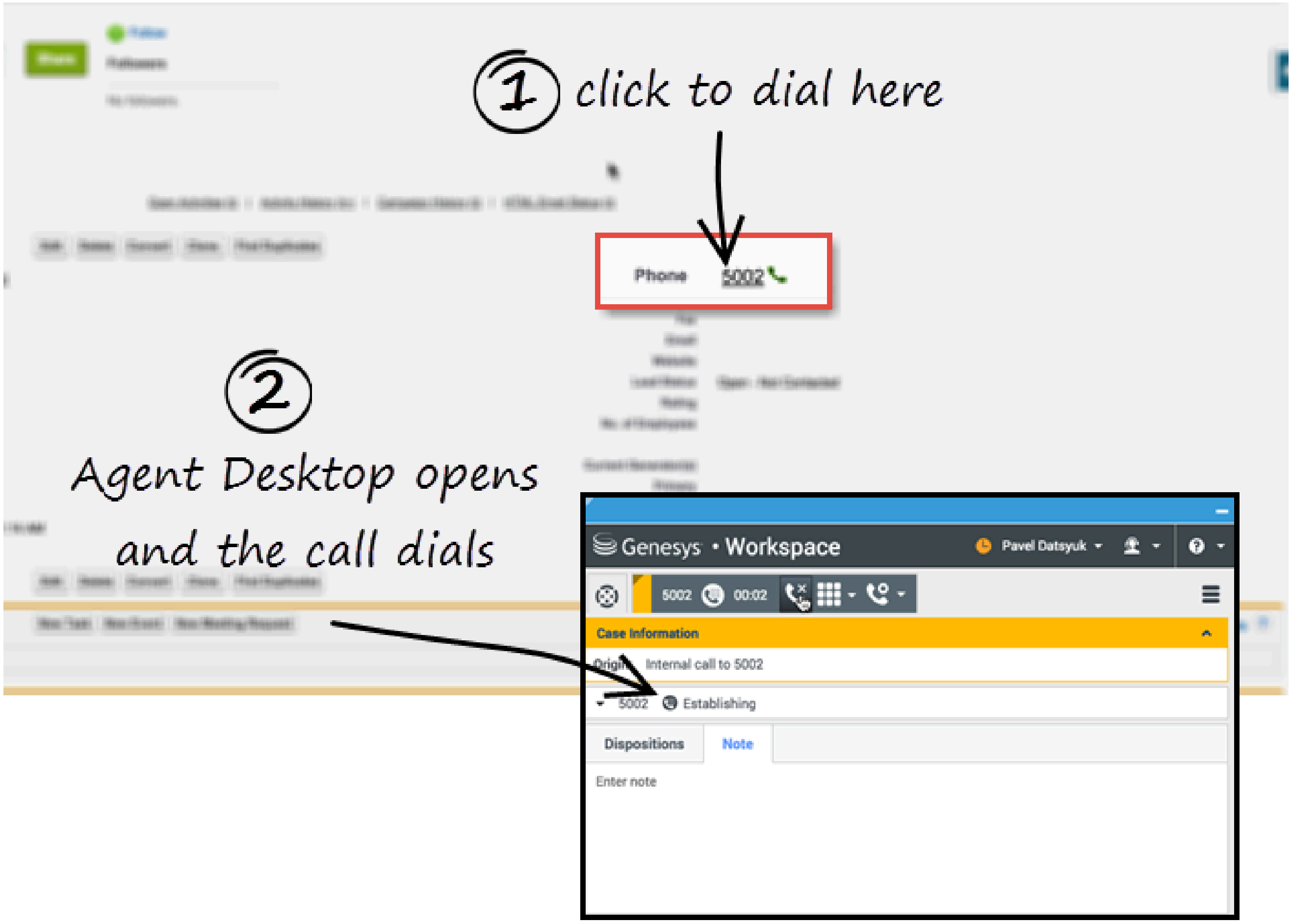
After you open Agent Desktop, you can click anywhere in the title bar along the top of the Agent Desktop window to drag it to a new position within your browser window. You can also undock Agent Desktop by clicking the arrow at the top right of the window. This opens Agent Desktop in a new browser window that you can resize and drag to a new location. If you want to redock the window, just click the arrow again and the window returns to the standard location.

Supported features

Agent Desktop console includes some features that integrate with your sales or service console. This means that actions that you take in the console or Agent Desktop can be seamlessly passed to each other.

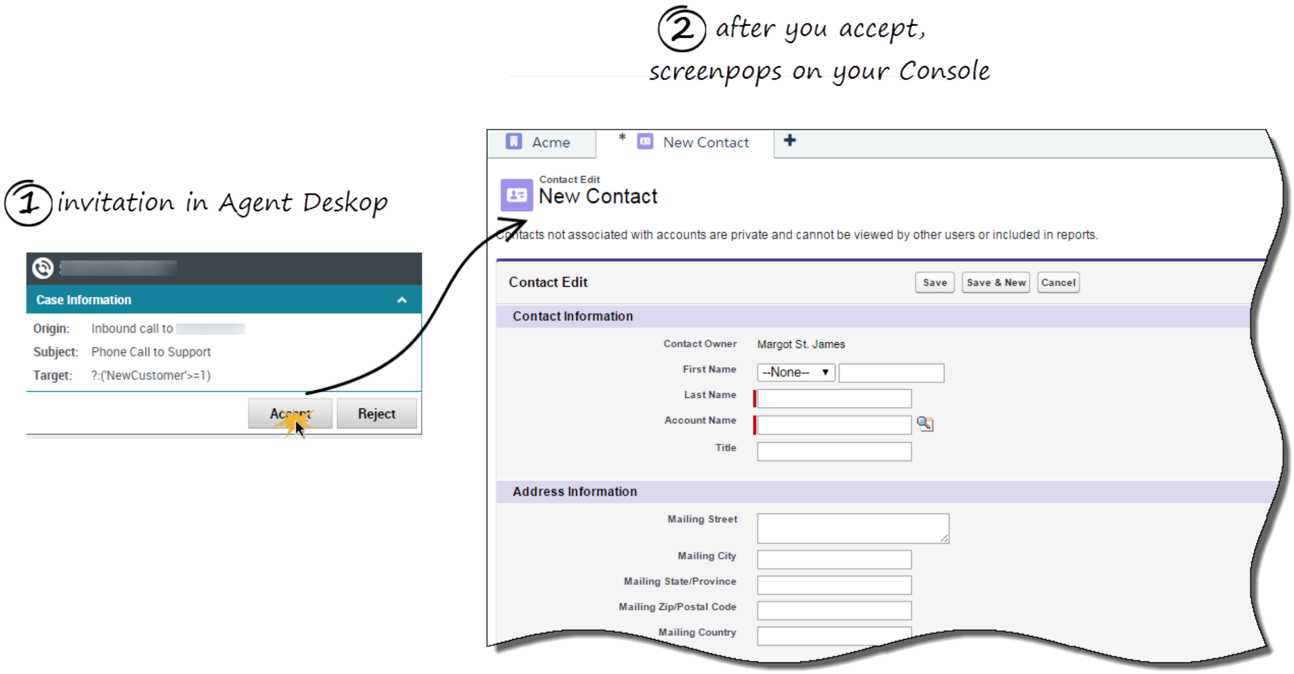
Integration points include:

Using click-to-dial



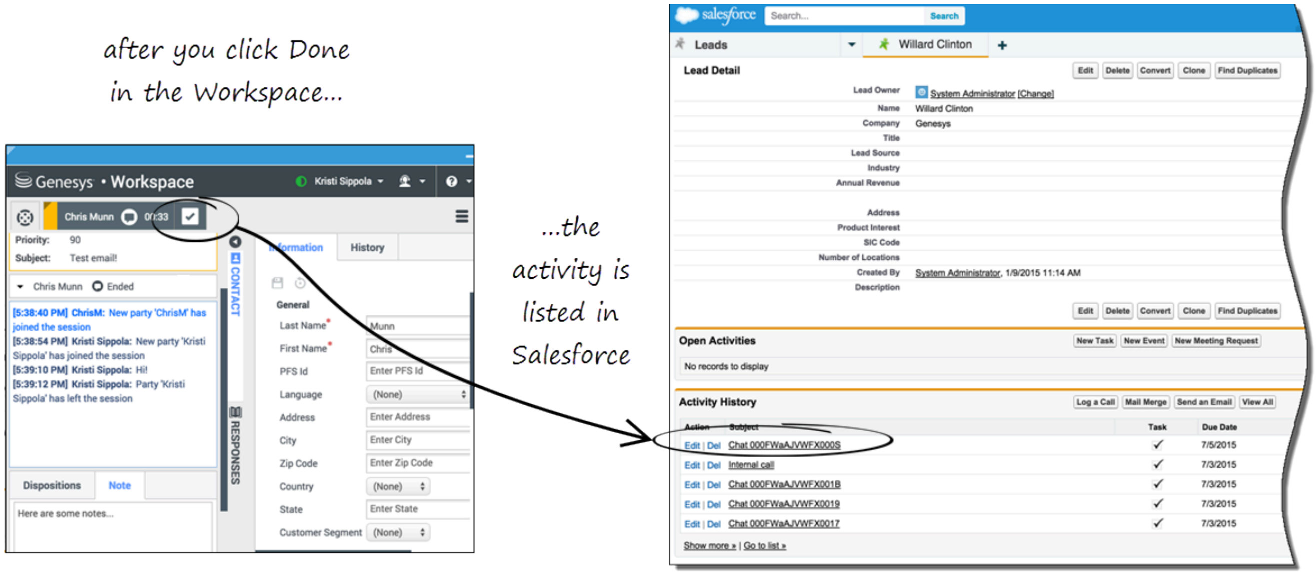
With click-to-dial, when you click a phone number in your console, Agent Desktop automatically dials it and starts the call. For example, you might search for a contact and then click the related phone number.

Screen pops



Screen pops are contact records that are displayed when an agent receives or makes a call, chat or email in Agent Desktop. Your console can display one or more related records, depending on what information it has about the customer. For example, if a customer enters their case number before they talk to the agent, your console displays the case automatically when the agent receives or makes the call in Agent Desktop. If there is no contact information available, the **New Contact** page is displayed.

Activity history



When you mark a voice, chat, inbound email, or outbound campaign interactions as done (**Mark Done**), the details about the interaction are added to the contacts's activity history in Salesforce.

The types of information that are saved in the activity history include:

- call duration
- call type
- case data
- call UUID
- disposition
- notes
- time stamp
- chat transcript
- email subject
- email body

Tip

- For chat interactions, the **Call type** field shows all chats as **Inbound**.
- For emails, the **Call type** field shows **Inbound** for received emails and **Outbound** for sent emails and replies.

Voice calls or chats that could not be established are not saved in the history. When a voice call or chat involves multiple parties, such as consultations and conferences, the activity is saved as only one interaction.

Important

- If you use the Mozilla Firefox web browser, issues may occur if you pop Agent Desktop out to a new browser window or if you move Agent Desktop within the Salesforce sales or service console.
- In Lightning Experience mode, you cannot move, pop out, or resize the Agent Desktop window. The size of the window is pre-configured during deployment.

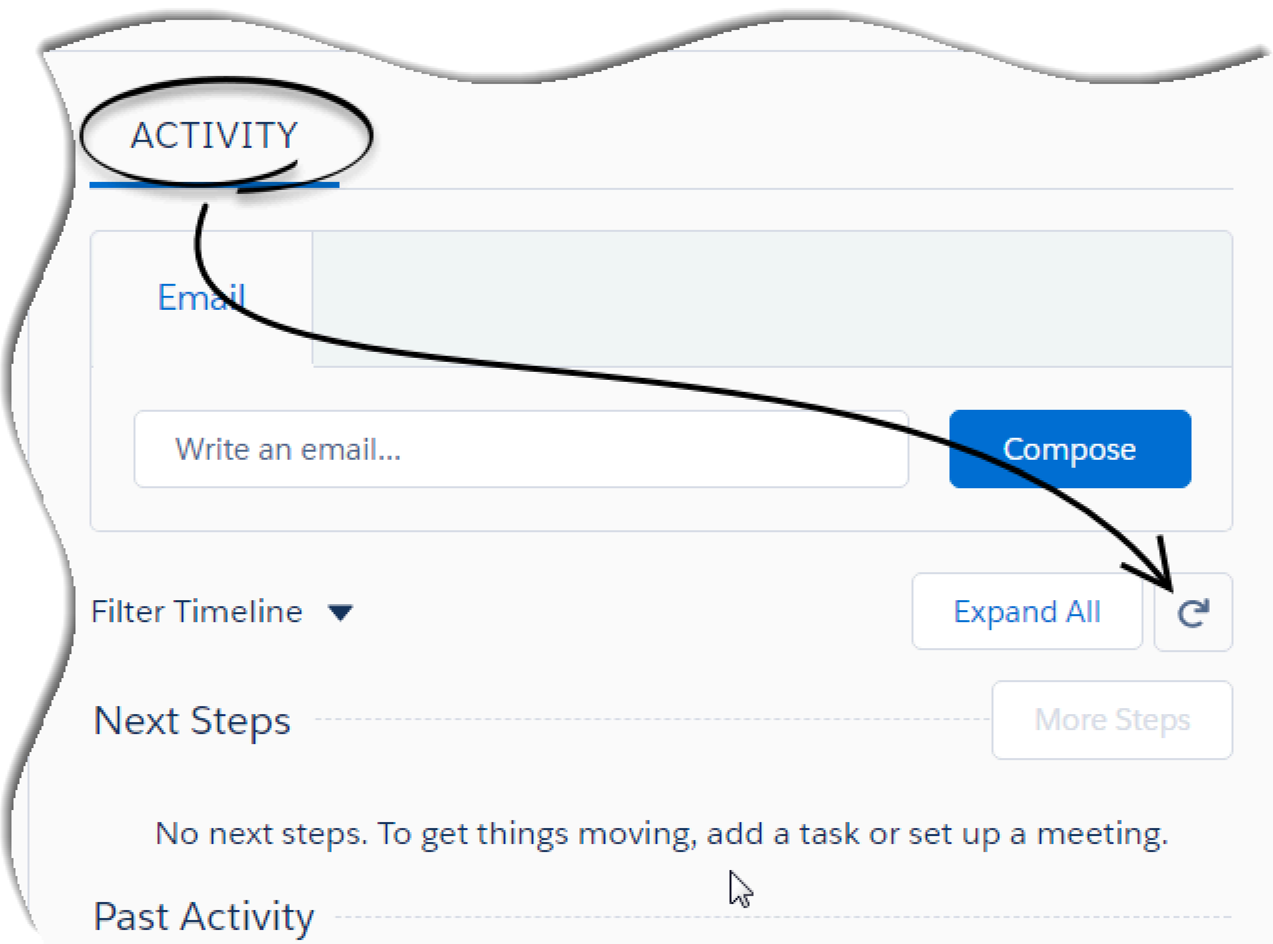
Related documentation

- For agents—To learn how to use Agent Desktop, see Agent Desktop help.

Lightning Experience (v8)

The Lightning Experience functionality in Gplus Adapter for Saleforce - Agent Desktop option is the same as it is in Salesforce with the following exception(s):

Activity history



Accessing the activity record can be done slightly differently in Lightning Experience. There is a **Refresh Activity History** icon that can be used instead of navigating off the page, or refreshing:

1. Click **Contacts** from the menu bar.
2. Select the contact name.
3. Click the **Refresh Activity History** icon, in the **Activity** tab to review all **Past Activity**.

4. Clicking on an activity will open the **Task** window for that item.

Gplus Adapter for Salesforce (v9)

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Gplus Adapter for Salesforce (v9).

Gplus Adapter for Salesforce is a soft phone integrated within the Salesforce environment that offers many of the same features as the Genesys Agent Desktop (v9).

Important

What you see in Gplus Adapter depends on your contact center and your role within it, so you might not be able to do or see all the things covered in this help. If you think you should be able to do or see something you can't, check with your supervisor or system administrator.

How can I use Gplus Adapter as an agent?

As an agent, you can use Gplus Adapter to handle calls, chats, emails, or other media channels interactions without navigating away from your Salesforce environment.

Check out the topics below to explore more details.

- Getting Started - helps you to get quickly up and running with your Gplus Adapter.
- Working with Gplus Adapter - helps you to understand the features and functions that are available in Salesforce as part of Gplus Adapter integration.
- Click-to-dial - helps you to make connections easily by clicking to make a call.
- Screen Pops - helps you to see a contact record as soon as you receive an interaction.
- Activity History - helps you to work with the Salesforce contact activity history by adding details about the interactions you handle.
- Genesys Agent Desktop help - helps you to explore complete set of functions that you can use in Gplus

Adapter as an agent.

Getting started

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Getting started.

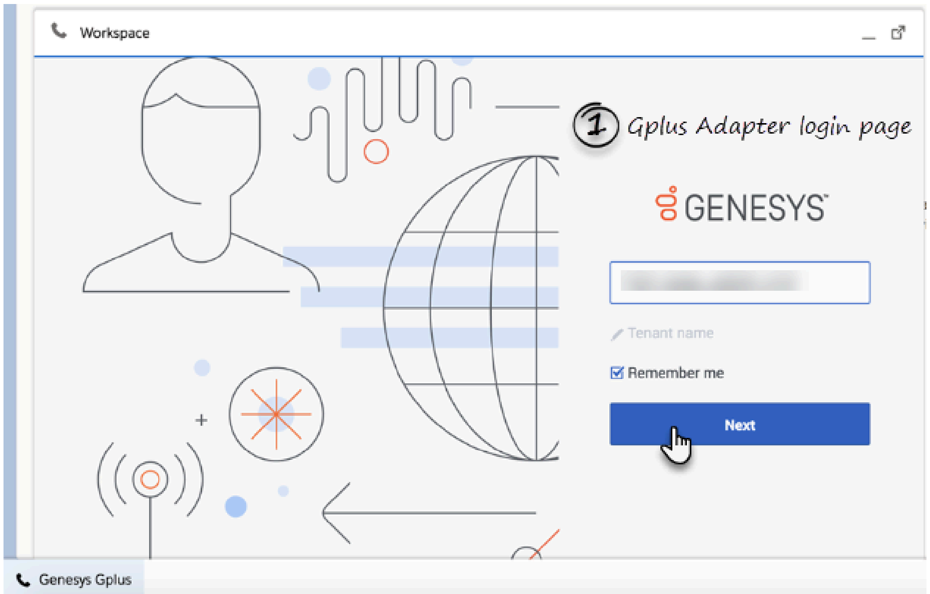
Logging in and getting ready to take call and handle Genesys Digital channels.

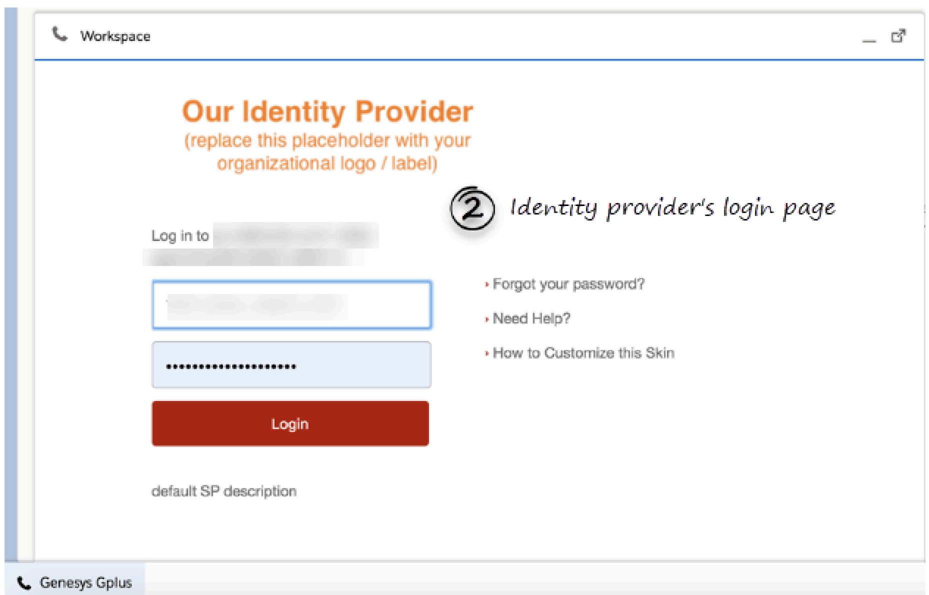
How do I log in?

You can log into Gplus Adapter from within Salesforce Lightning doing the following:

1. Click the soft phone icon at the bottom-left corner of the **Utility Bar**.
2. Follow the log in procedure. For more information about logging in, see Getting Started in the Genesys Agent Desktop help.
3. After you successfully log in, you can start working in the Adapter main view.

Log in with single sign-on (SSO)





Important

This feature is supported only for Engage Cloud.

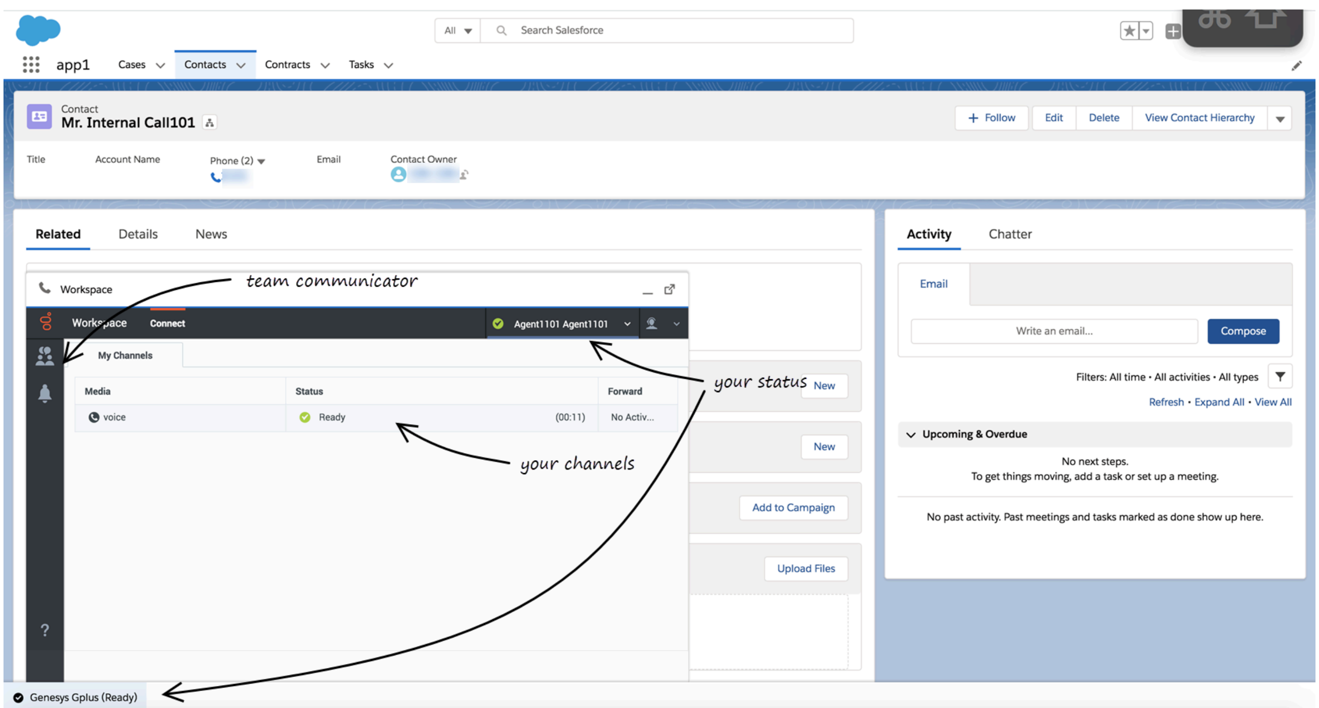
Log in to Salesforce Lightning as usual, click the Gplus Adapter button at the bottom-left corner of the Salesforce Lightning Utility Bar, enter your Genesys Username and click **Next**.

If Adapter is configured for SSO, you will be prompted to enter the Adapter credentials in the identity provider's (for example, Okta) login screen. Once you log in with the identity provider, you're redirected back to Adapter and automatically logged in. Alternatively, if you are already logged in with the identity provider, when you click **Next**, you will have immediate access to Adapter.

The identity provider differs for different organizations, so the login page of the identity provider might not be the same as the one in the image to the left.

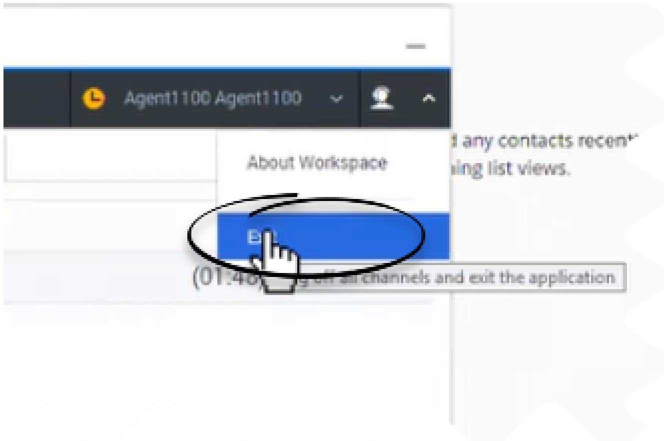
Some contact centers use Salesforce as the identity provider. In this case, you will not be redirected to an identity provider login screen. Since you are already logged in to Salesforce Lightning, your identity is confirmed without you having to enter your password.

Gplus Adapter main view



The Gplus Adapter button in the Salesforce Lightning Utility Bar displays your current status obtained from Workspace Agent Desktop. If Gplus Adapter is minimized, it still reflects changes to your current status. Refer to Getting started in the *Workspace Agent Desktop Help* for more information about your status and the status icons.

How do I log out?



To log off all channels and sign out of Gplus Adapter, click the agent icon and then select **Exit**. A modal pop-up window will open asking your confirmation to log out of the application. Click **Exit**. If your company does not use SSO, Adapter returns you to the login page, where you can enter your credentials again, if needed.

Ensure that you close all the interactions before logging out, otherwise you will see an error message.

If your company uses SSO, after you log out, you must click the **Login** link to start a new session. See the Workspace Help for more details. **NOTE:** This feature is supported only for Engage Cloud.

Working with Gplus Adapter

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Working with Gplus Adapter.

Gplus Adapter deployed in Salesforce Lightning enables you to handle Genesys contact center functions from Salesforce along with Salesforce-specific features such as updating activity history, screen pop, and click-to-dial.

How do I access Gplus Adapter?

If Gplus Adapter is configured in Salesforce Lightning, you will see a phone icon in the bottom-left corner of your screen. Click the phone icon and you will see a pop-up window where you can login with your Adapter credentials.

Integrating Interactions with Salesforce Lightning

Gplus Adapter integrates functionality of the following interaction types with Salesforce:

- Voice
- Chat
- Email
- Outbound Preview
- Open Media Workitems

For information about how to handle specific interaction types, refer to the Agent Desktop Help.

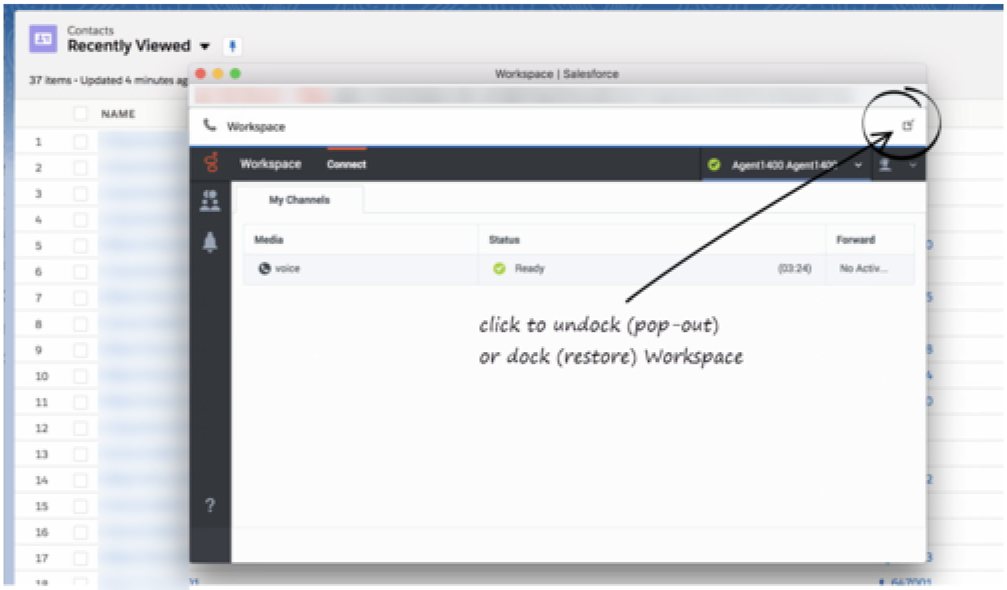
Pop out, moving and resizing Adapter

By default, the Adapter window launches in the bottom-left corner in the Salesforce environment.

If you want to move the Adapter window to a different location, undock (pop out) the window by clicking  in the top-right corner of the Adapter window and drag it where you want to place it.

Once you undock the window, you can move or resize the window as needed.

You can dock (restore) the window back to its original position by clicking .



The Adapter window can be manually maximized and minimized by clicking .

Interaction events that trigger Adapter to be maximized

If you have minimized Adapter to handle other tasks in Salesforce, the Adapter window is automatically maximized by the following events:

- Receiving voice, chat, email, or workitem interactions
- Releasing interactions
- Marking Done interactions
- Receiving connections error notifications
- Receiving confirmation that an interaction has been processed

Supported features

Gplus Adapter includes some features that integrate with Salesforce Lightning environment. This means that actions that you take in Salesforce or Gplus Adapter can be seamlessly passed to each other.

The integrated features are:

- Click-to-dial

- Screen pops
- Activity history

Handling multiple calls

If you are on a call with an internal target as a second call while you are already handling a customer's call, then Adapter will create the Salesforce activity history only when the customer's call is active.

> **Important**
> If you are using the Mozilla Firefox browser and making a consultation call, you might not be able to enter an agent's number occasionally. The workaround is to minimize and maximize the Adapter window or click anywhere in the Salesforce window. This is a Salesforce known limitation and it occurs intermittently.

Reconnecting Genesys Server

When working with Adapter, if you are disconnected from Genesys server due to some reason, you will receive appropriate notifications. Follow the instructions in the notifications to have you connected back to the server. For more information about these notifications, see Handling a system disconnection in the Genesys Agent Desktop help.

Related documentation

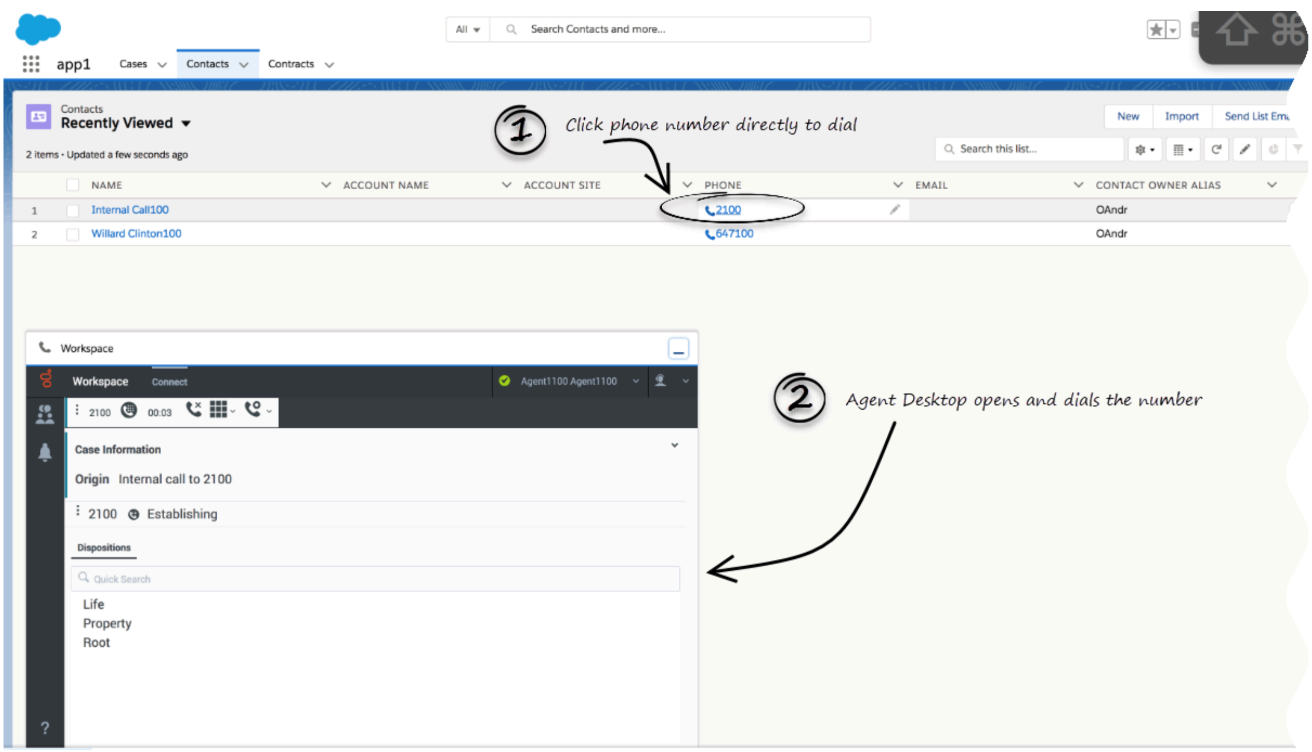
- To learn how to use Gplus Adapter, see the Genesys Agent Desktop help.

Click-to-dial

> ## Important
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Click-to-dial.

Click-to-dial makes connecting to your customers easy. All you have to do is click their phone number to make a call.

Using click-to-dial



With click-to-dial, when you click a phone number in Salesforce, Adapter automatically dials it and starts the call. For example, you might search for a contact and then click the related phone number.

Related documentation

- To learn how to use Gplus Adapter, see the Genesys Agent Desktop help.

Screen Pops

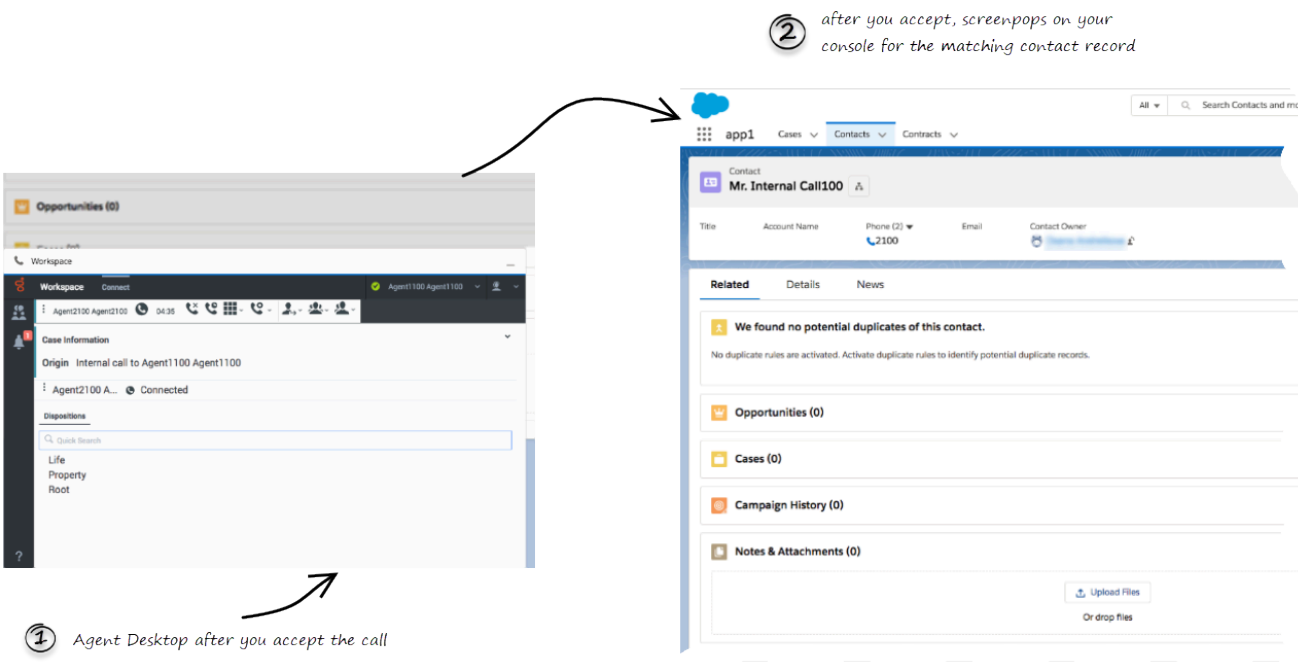
Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Screen Pops.

When you receive an interaction, you will see a contact Salesforce record pop up on your screen.

What are screen pops?

Screen pops are Salesforce records or other pre-configured objects that are displayed when an agent receives a call, chat, email, or other media channel interactions in Adapter. Your console can display one or more related records, depending on what information it has about the customer. For example, if a customer enters their case number before they talk to the agent, your console displays the case automatically when you receive or make the call in Adapter. If there is no contact information available, the **New Contact** or other record page is displayed, depending on how your administrator has set up your account.



Events that trigger a Salesforce record screen pop

A Salesforce record screen pop is typically triggered when an interaction is initiated (ringing call) or after you have accepted an interaction (establishing a call). Your administrator sets up Gplus Adapter to trigger screen pops based on different events. Here are the different events that can trigger Salesforce record screen pops for different interaction types:

Events triggering a Salesforce record screen pop

Interaction type	Event
Voice interaction	Call ringing
	Call accepted and established (if it was previously ringing)
Chat interaction	Chat notification received
	Chat notification accepted
Email interaction	Email notification received
	Email notification accepted
Open media interaction	Open media (workitem) notification received
	Open media (workitem) notification accepted
Outbound interaction	Clicking **Get Record**
Outbound Push Preview interaction	Outbound record notification accepted

Voice call Salesforce record screen pop types

Different Salesforce record screen pop types might be set up for you when a call is ringing or when you accept and establish a voice call.

Your Salesforce record screen pop could be one of the following types:

- A configured Salesforce Object such as Salesforce contact.
- A Salesforce flow.
- A web page (URL) might be opened in a new tab or window.
- An object home, such as the list of recently viewed contacts.
- A Salesforce list; for example, the **All Contacts** list.
- The **Search Results** screen pop, containing the search results based on case information such as the contact name.
- The **New Account** dialog box.

Outbound campaigns

The Outbound Campaign calling list is correctly updated only if you dial from Agent Desktop. Dialing using a click-to-dial phone number field in Salesforce is not an Outbound Campaign call and the calling list will not be updated in such dialing scenarios.

Related documentation

- To learn how to handle interactions, see the Genesys Agent Desktop help.

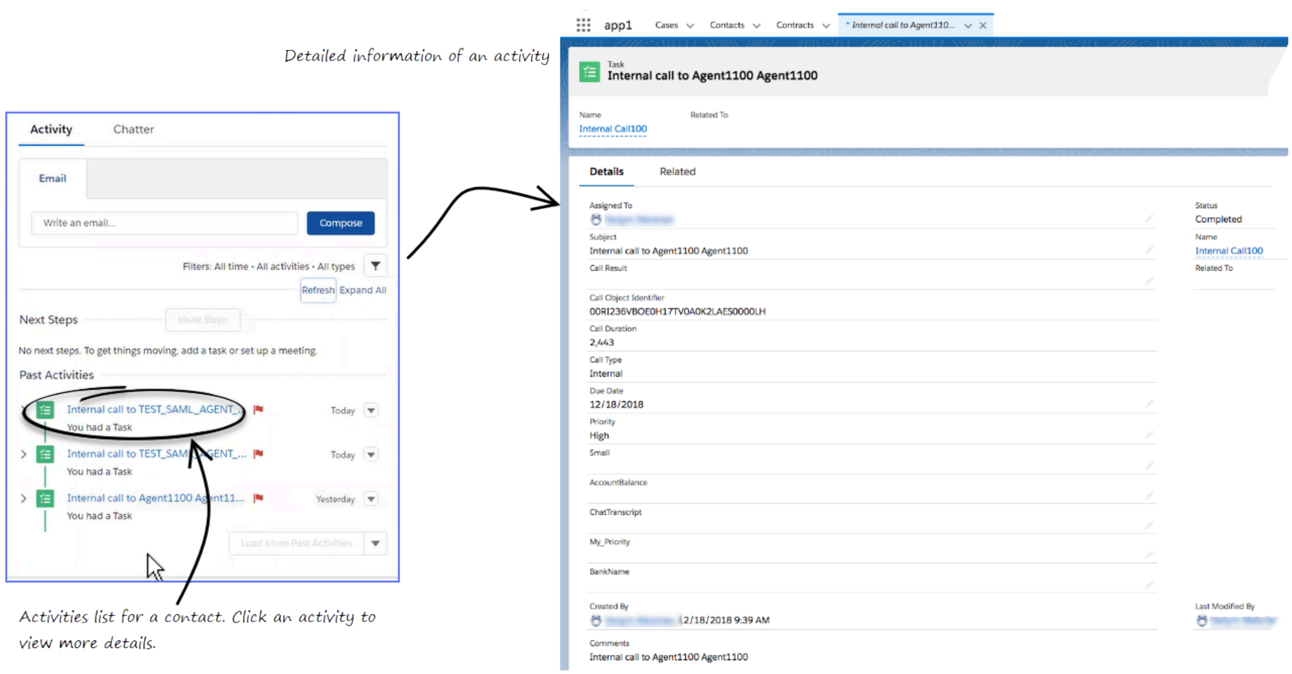
Activity History

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Activity History.

Gplus Adapter works with the Salesforce contact activity history by adding details about the interactions you handle.

Activity history for interactions



When you mark a voice, chat, email, or any other media channel interaction as done (**Mark Done**), Adapter searches for a corresponding record in the Salesforce database and links the task to the selected record. If record is found, Adapter creates an activity log task and links it to the matching record. If no corresponding record is found, or if more than one candidate record is found, Adapter instead creates a task in the Task Pool; you can then associate the task to the correct record.

In some environments, Adapter might be set up to create an activity record when the screen pop is displayed and modifies the logged activity when you mark the interaction **Done**. Activity on screen pop is created for inbound and internal calls.

You cannot update the **Comments** (Description) field. If you want to add notes to the activity log **Comments** field you must do so after you mark the interaction as **Done**. Any changes you make to the activity log *before* you mark the interaction as **Done** are overwritten by Adapter after you click **Done**.

The types of information that are saved in the activity history include:

- subject
- call duration
- call type
- case data
- call UUID
- disposition
- notes
- time stamp
- chat transcript
- email body

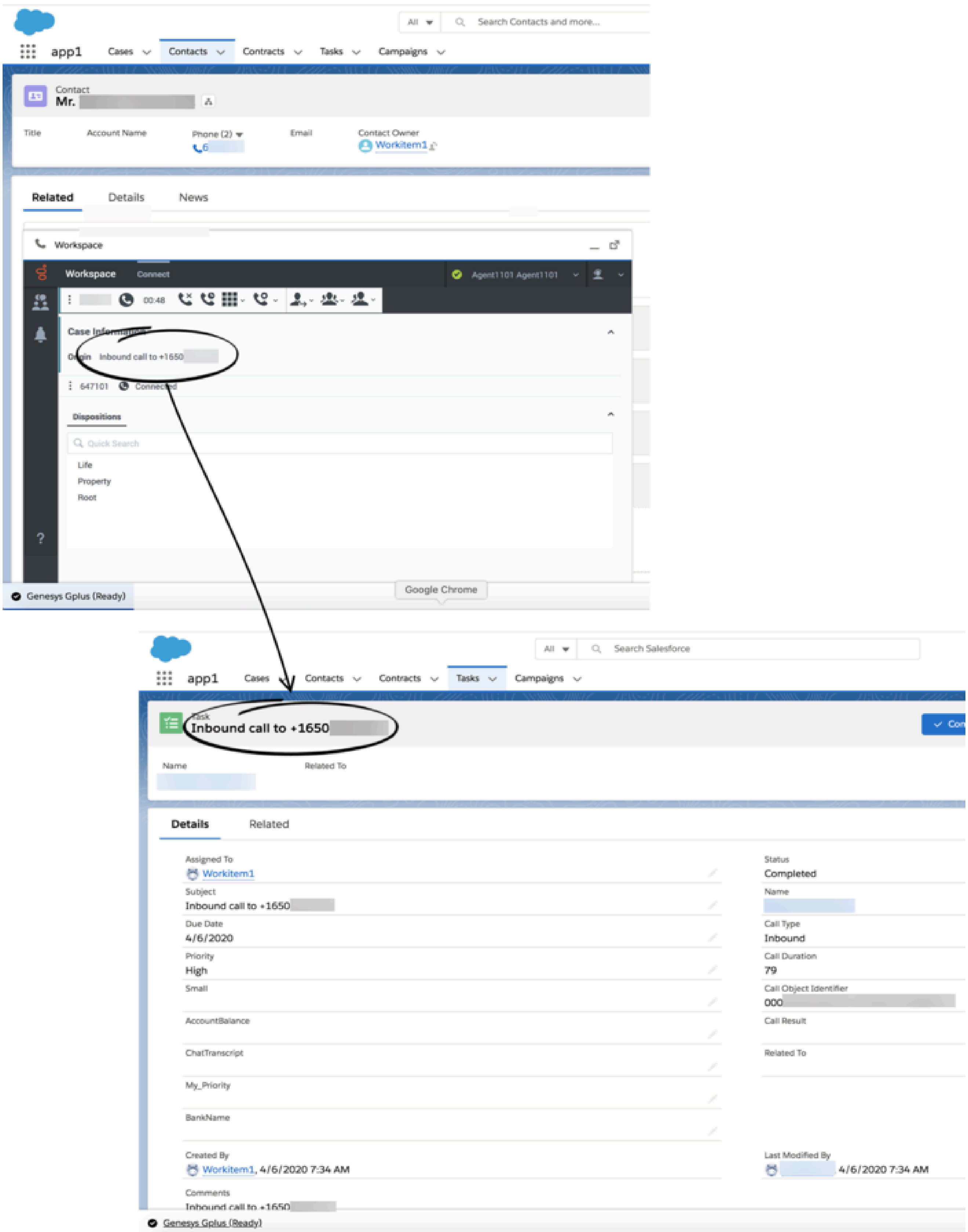
Tip

For Chat and Open Media interactions, the **Call type** field shows all chats as **Inbound**.
For emails, the **Call type** field shows **Inbound** for received emails and **Outbound** for sent emails and replies.

You can view the activity history of a contact by opening the contact record from **Contacts** tab and navigating to the **Activity** tab. The **Activity** tab shows all the activities performed against the contact. If you do not see the latest activity, click **Refresh**.

Clicking an activity will open the **Task** tab for that item where you can see the complete details of an activity.

Voice calls or chats that could not be established are not saved in the history. When a voice call or chat involves multiple parties, such as consultations and conferences, the activity is saved as only one interaction.


app1
Cases
Contacts
Contracts
Tasks
Campaigns
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Mr.
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Account Name
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Contact Owner
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Last Modified By
4/6/2020 7:34 AM
Genesys Gplus (Ready)

Related documentation

- To learn how to use Gplus Adapter, see the Genesys Agent Desktop help.

Gplus Adapter for Microsoft Dynamics 365

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

The Gplus Adapter for Microsoft Dynamics 365 provides integrated management of communication channels within the Microsoft Dynamics 365 CRM. For agent documentation, see the Agent Guide.

Workforce Management 8.5.1

Welcome to Workforce Management (WFM) 8.5.1 Web for Agents Help. Use this page to go directly to the information you need, or use the Table of Contents to take a step-by-step tour of all the features and functions in Genesys Workforce Management Web for Agents.

Important

If you are using Workforce Management 8.5.2, refer to the Workforce Management Agent Help.

Getting Started

Become familiar with WFM Web for Agents

- Login Timestamp
- Menu Options
- Changing the Date
- Logging Out

Scheduling and Trading

Adjust your schedule, make schedule trades

- My Schedule Pane
- Other Schedules Pane
- Trading Road Map
- Trading Windows for Specific Tasks

Availability and Preferences

Use availability patterns, add preferences, request time off

- Availability Patterns
- Changing Your Preferences
- Requesting and Editing Time Off

Bidding and Configuration

Use schedule bidding, configure WFM Web for Agents

- Bidding Scenarios
- Bidding Assignments and Details
- Configure Your Personal Pane
- Configure Shared Transportation

Workforce Management Web for Agents overview

Important

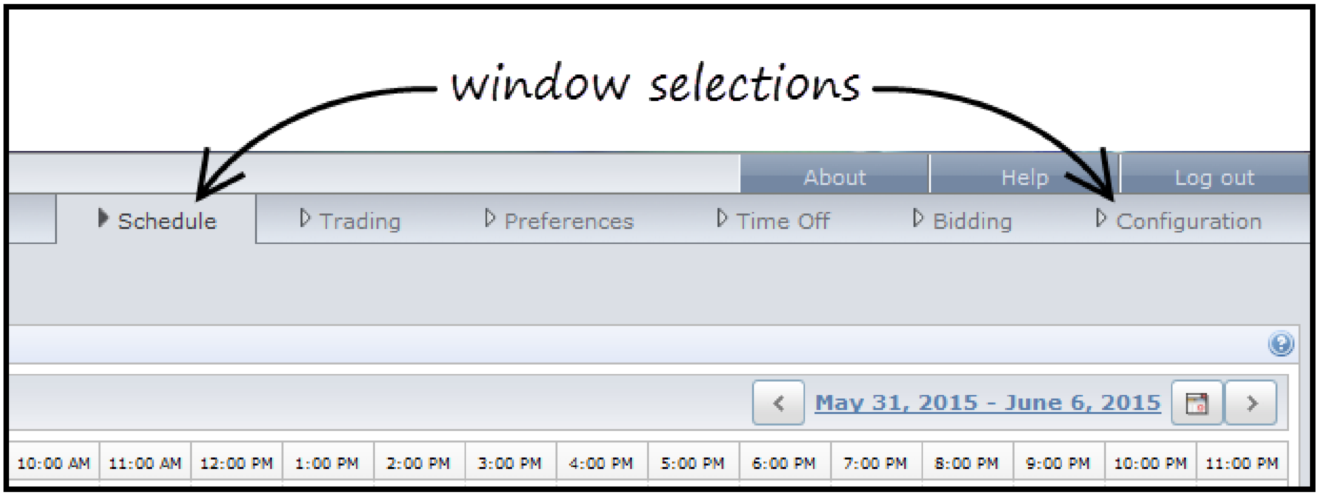
This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Workforce Management (WFM) Web for Agents is an application that you can open from your browser. WFM Web for Agents gives you all the tools you need, as a contact center agent, to manage your work schedule:

- You can enter your schedule preferences – indicate days and times that you prefer to work.
- You can trade shifts with other agents.
- You can bid for shifts in an online "auction".

In addition to features that help you manage your work schedule, WFM Web for Agents includes features that help you organize or track other work-related activities. For example, if you work in a very large contact center, you can use WFM Web for Agents to organize shared transportation for travel to and from work.

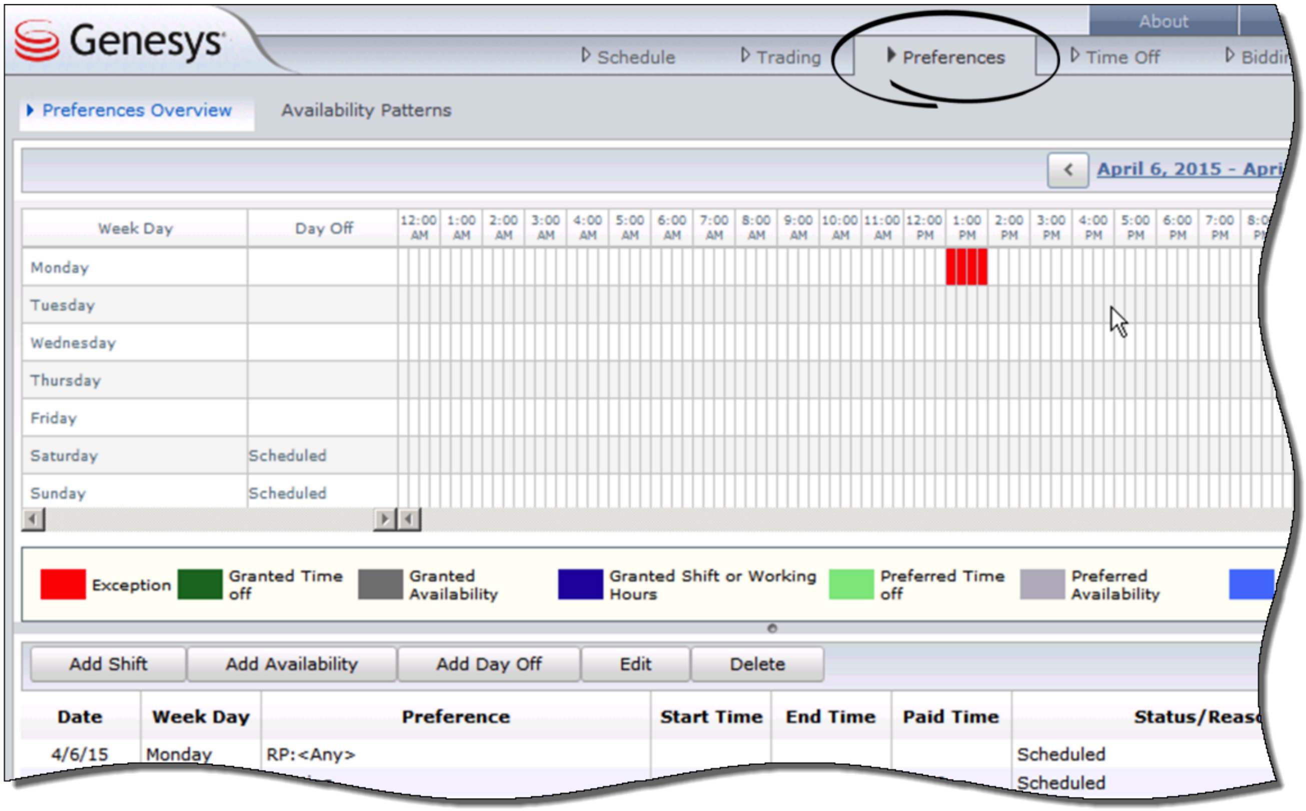
WFM Web for Agents interface



When you log in to WFM Web for Agents, the first thing you see is your work schedule for the current week. This is the **Schedule** window. Along the top of the interface, you will probably have links to other windows. You will use these windows to manage your time at work and your time off.

The available windows might vary among agents or across departments. Your contact center staff will give you access to the WFM Web for Agents windows that reflect the workflow at your site. For example, in a small contact center where there are only a few agents, the contact center might not use the *shift trading* features in WFM Web for Agents. In that case, you would not have a **Trading** button or window.

Let your supervisor know which days you prefer to work



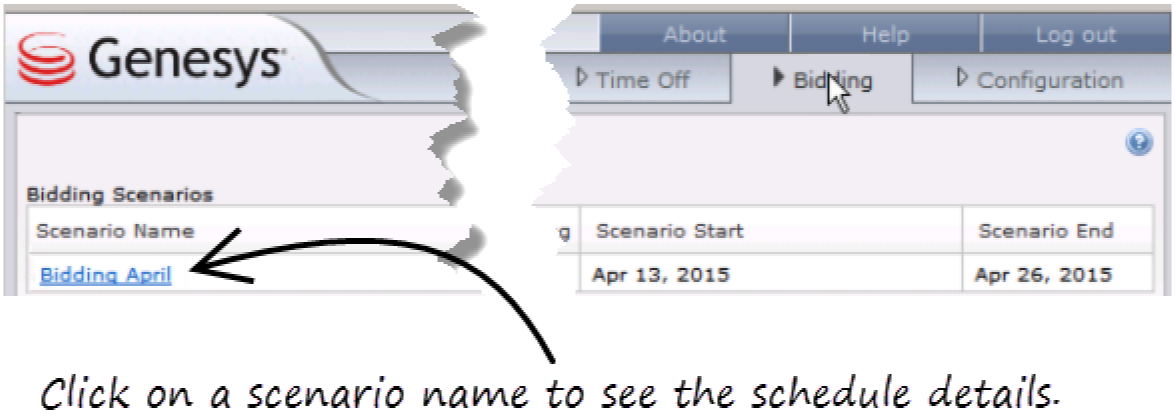
In most contact centers, you can select a work schedule or shift that works best for you. You use WFM Web to tell your supervisor which days you prefer to work in a week. You might use only the **Preferences** window, or only schedule bidding, or a combination of the two.

You use the **Preferences** window to indicate which days you prefer to work, indicate the days you are available to work, and track the status of your requests. For example, you might prefer to work Wednesday to Sunday instead of Monday to Friday. It is a full work week, but you are indicating that you prefer to have Monday and Tuesday off rather than Saturday and Sunday. A supervisor will have to review and approve your requests for particular work days and shifts before your preferences are applied to the schedule.

For detailed information about entering and tracking your schedule preferences, see the following pages:

- Preferences
- Adding and editing shift preferences
- Adding and editing day off preferences
- Adding and editing availability preferences

Bid for schedules



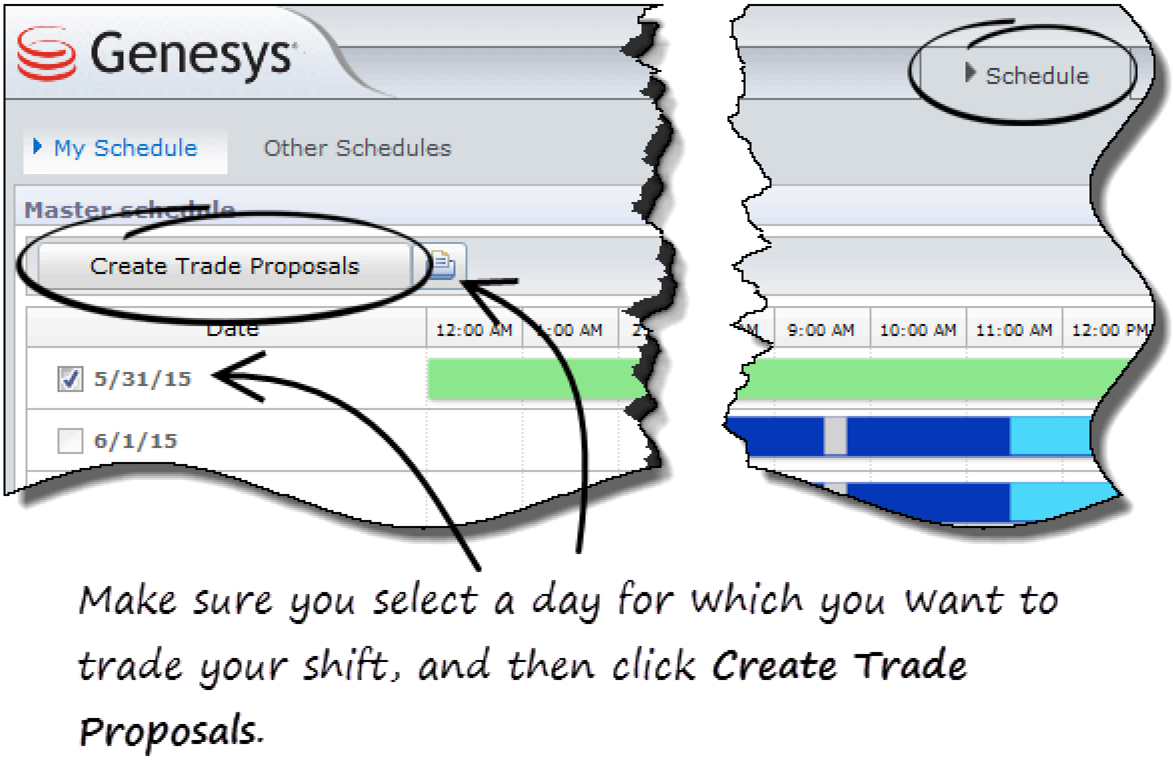
Schedule bidding is another way to indicate your schedule preferences. Instead of the **Preferences** window, you use the **Bidding** window. Schedule bidding is like an online auction. There is a day on which bidding opens, and a day when it ends. On the **Bidding** window, you review a list of possible schedules for upcoming weeks and *rank* schedules to indicate which ones you like best.

If many schedules are posted during the bidding cycle, you can sort and filter the list to more quickly find those that suit you best. For example, you might sort the list based on the time when shifts begin, or filter the list based on the days off included in each schedule. For more information, see Bidding.

For more information about bidding scenarios, see the following pages:

- Bidding Scenarios View
- Bidding Assignment Pane
- Bidding Details View
- Bidding Assignment Filter View
- Bidding Assignment Sort View

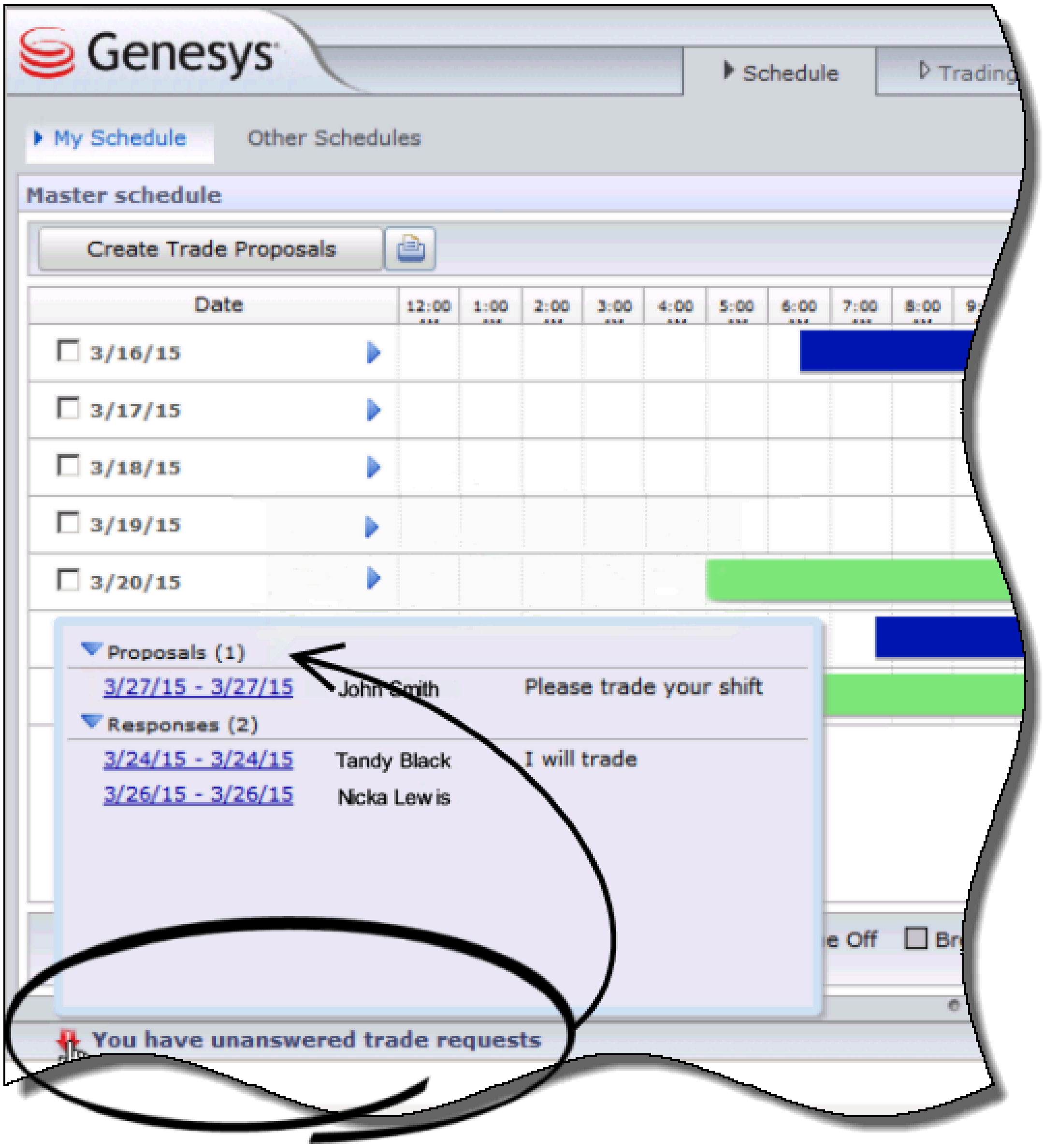
Trade your shift with another agent



If you are scheduled to work a late shift on Monday, but an outside appointment makes that difficult, then you might want to trade shifts with an agent who is scheduled to work a shift earlier in the day. If your contact center allows agents to trade shifts, then you probably have a **Trading** window in your WFM Web for Agents.

You can send a trade request from your **Schedule** window. You then use the **Trading** window to track your trade requests, responses, approvals, and so on.

Review requests to trade your shift



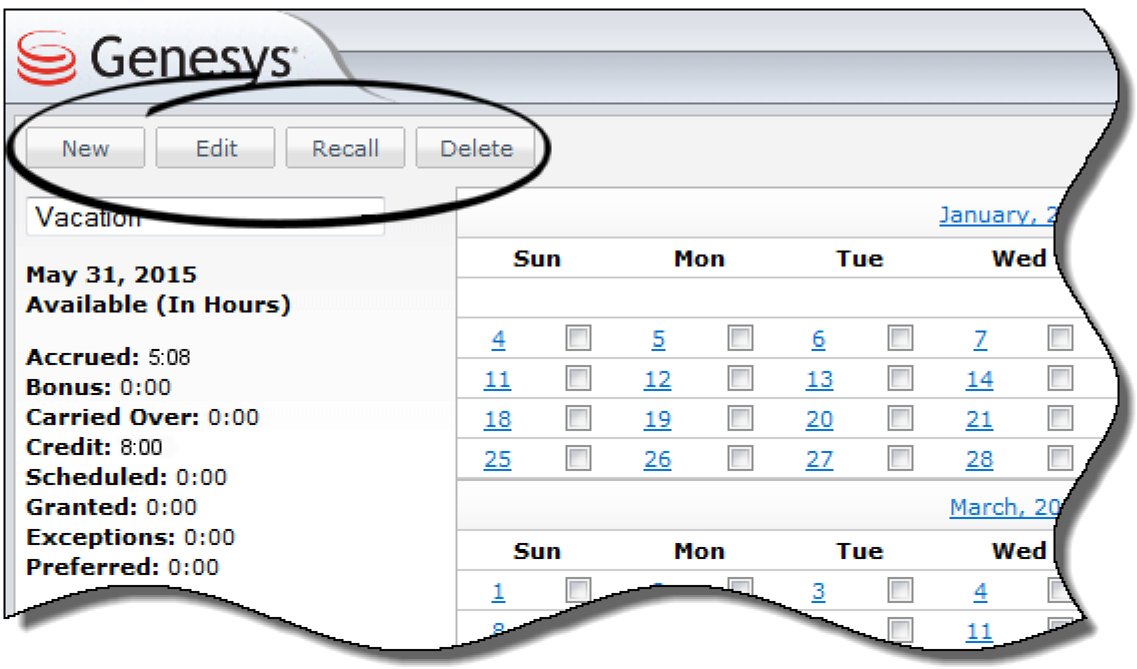
If your contact center lets you trade shifts with other agents, then you will receive shift trade requests from other agents from time to time. When you receive a *proposal* from another agent to trade shifts, you will see a notification at the bottom of your WFM Web for Agents window. Click the notification to see more information about the trade request.

For detailed information about trading shifts, see the following pages:

- Trading
- Trading Windows Road Map

- Reviewing My Proposals and Their Responses
- Reviewing My Responses to Other Agents' Proposals
- Creating Trade Proposals
- Adding Comments to a Trade
- Viewing Personal Proposals Available to Me
- Viewing Community Proposals
- Viewing Other Agents' Schedules
- Viewing Other Agents' Schedule Details

Request vacation days



You use the buttons on the **Time Off** window to request vacation time or other time off, to edit a request for time off, or to cancel a request for time off that has not yet been approved or scheduled.

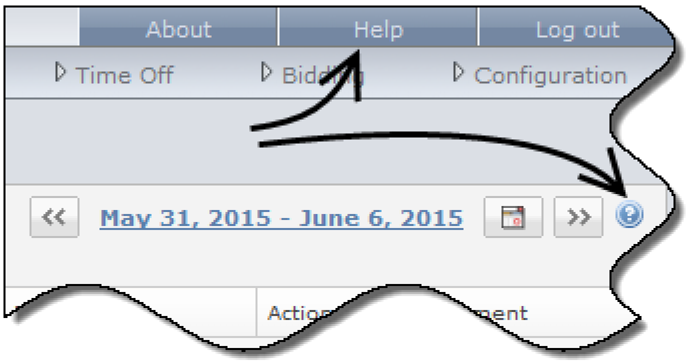
The **Time Off** window shows you, at a glance, which days you have requested as vacation, how many hours you have accumulated as bonus hours, the status of requests for time off, and much more.

For information about using the buttons on the **Time Off** window, see the following pages:

- Requesting Time Off
- Editing Time Off

- Deleting Time Off
- Recalling a Time-Off Request

Find information about WFM Web for Agents



When you are working in WFM Web for Agents, you can find information about the window and options you are currently viewing by clicking the icon. If you want to search for more general information about the interface, use the Help button at the top of your screen.

Getting Started

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

With Workforce Management (WFM) Web for Agents you can:

- View your schedule (on your desktop or iPhone).
- Select a scenario for schedule bidding.
- Indicate schedule preferences.
- See how much time off you have of each time-off type.
- Request time off.
- View other agents' schedules (if enabled at your site).
- Trade your schedule days with other agents (if enabled at your site).

Opening WFM Web

You can log into WFM Web from any computer with a web browser running JavaScript, such as Microsoft Internet Explorer, Firefox, or Chrome. The splash screen displays when WFM Web is loading the **Log In** GUI.

You will need the URL (web address) for WFM Web for Agents:

1. Ask your supervisor for the URL for WFM Web for Agents for your desktop.
2. After you are given this URL, add it to your browser's Favorites or Bookmarks list so that you can easily return to it.

> **Important**
> WFM Web is optimized for a screen resolution of at least 1024x768. At lower resolutions, some elements (such as table headers) might not display correctly.

Genesys recommends that you not run WFM Web in more than one browser window on the same workstation, because doing so can cause the program to behave unexpectedly. (In other words, do not open a second browser window on the same WFM Web session by selecting **File** > **New** or pressing **Ctrl+N**.)

However, you can start a separate WFM Web session by launching a separate instance of your browser, then logging in to WFM Web again from that browser.

Security Features

Whether you can view other agents' schedules, and whether they can view yours, depends on how your system administrator has set up WFM Web. However, other agents can never set preferences or make vacation requests for you, nor vice versa.

To improve on system security, an enhancement enables the timestamp information from the previous login to display in the GUI the next time you log in to WFM Web through the Agent or Agent Mobile interface, alerting you of any unauthorized use of your login credentials.

Where Next?

Login Timestamp

Menu Options

Changing the Date

Schedule

Bidding

Preferences

Trading

Time Off

Configuration

About WFM Web

Logging Out

Session Expiration

Login Timestamp

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

The Workforce Management (WFM) Web GUI displays the timestamp information from the previous login the next time you log in through the Agent or Agent Mobile interface, alerting you of any unauthorized use of your login credentials.

In the Web for Agents interface, the timestamp displays the date and time in the time zone that is selected from the drop-down list. It is displayed in the Configuration module under **Personal** just above the Themes section. (See figure below.)

In the Web for Agents Mobile interface it is displayed in the Dashboard view below the version information.

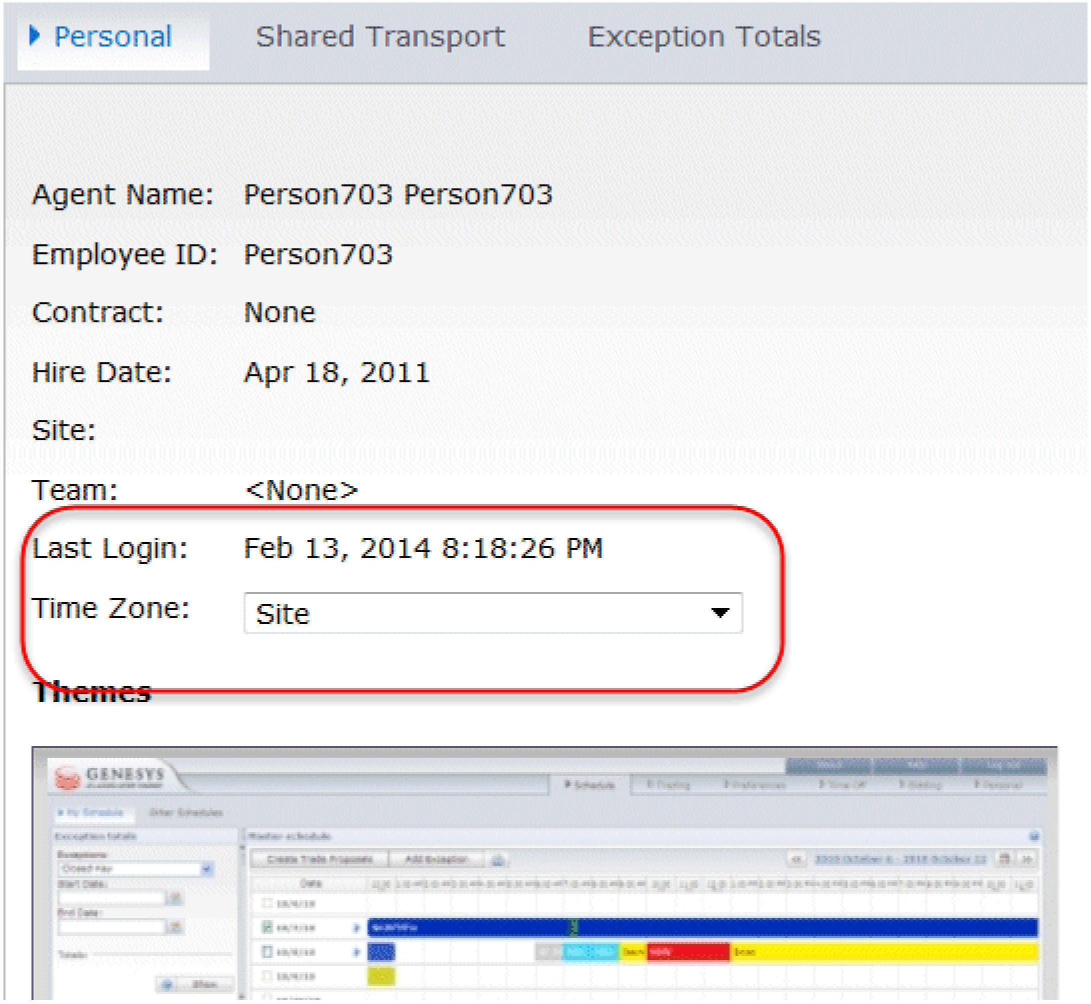


Figure: System Login Timestamp

Menu Options

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Every WFM Web for Agents window displays the Menu Bar, which contains a set of navigation buttons. Click these buttons to move from window to window: **Schedule**, **Trading**, **Preferences**, **Time Off**, **Bidding**, or **Configuration**.

> **Important**
> - You might not see all of these items on your Menu Bar, depending on the options that have been configured for you.
> - When WFM Web opens, it displays your schedule for the current week. See Changing the Date for help on how to display different weeks.

The buttons **About**, **Help** and **Log Out** appear on every window.

Changing the Date

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

When you open WFM Web on your desktop or mobile device, the Daily Schedule window appears. It displays your schedule for the current week. To change the date, use the date arrow buttons Previous and Next or the pop-up calendar button . See the figure below.

Figure: Date and Calendar buttons

Similar buttons appear in other WFM Web windows. In some windows, they move you by different time intervals, as discussed below.

To use the date arrows:

- Click to move backward.
  - In the Schedule, Trading, and Preferences windows, you reach the previous week.
  - In the Time Off window, you reach the previous year.
- Click to move forward.
  - In the Schedule, Trading, and Preferences windows, you reach the next week.
  - In the Time Off window, you reach the next year.

To use the pop-up calendar:

1. Click the **Calendar** button .
   A calendar appears.
2. Set new dates.

- Click a day to select the week containing that day.
- Click the month drop-down list to jump to a different month.

- Click  or  on either side of the year to jump forward or back one year.

- Click **OK**.
The window automatically refreshes to match your date selection.

Logging Out

Important

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When you are finished using WFM Web, always log out.

Important

If you do not log out, other users might be able to view your account information.

To log out:

- Click **Log out** from any WFM Web window.

This ends your WFM Web session and returns you to the Login window. You can now close your browser if you want to.

Important

If your session expires, you are automatically logged out.

Session Expiration

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

A WFM Web session expires if you have not used it for a certain amount of time. If your session expires, the Session Expired warning appears when you attempt to use WFM Web.

To start using WFM Web again:

1. Click **OK** in the warning dialog box.
   The Login dialog box appears.
2. Enter your user name and password in the Login window that appears (just as you would to start using WFM Web).

If you are finished using WFM Web:

- Close your browser. If your session expires, you are automatically logged off.

Schedule

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Two panes near the top of the Schedule window offer different schedule views:

- **My Schedule**—Displays your schedule information for the current week. (To display other weeks, see Changing the Date.)
- **Other Schedules**—Displays a filterable, sortable, and searchable list of other agents and their schedules.

My Schedule

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

The menu bar across the top of the My Schedules pane offers the following Web Services Menu Options: Schedule, Trading, Preferences, Time Off, Bidding, and Configuration. You might not see all of these items on your Menu Bar, depending on the options that have been configured for you.

The schedule itself displays colored graphical schedule bars and a drill-down schedule details section. Each line of the details section contains a small box whose color matches the corresponding portion of the schedule bar, in browsers such as Chrome, FireFox, and Internet Explorer.

Visual cues in the details view include full names of selected exceptions, breaks, and other items.

If your site allows schedule trading, this pane also displays trading messages and controls with the following contents:

Control	Description
Trading *message box*	This area, near the bottom of the window, alerts you to any open trade proposals or responses. It does so with a message of the form "You have unanswered trade requests." This message is a link; click it to open the Personal Proposals window (if you have trade proposals from others) or open the My Proposals window (if you have responses to your trade proposals).
Create trade proposals *button*	Opens the create trade proposals window, where you can create new trade proposals for the days whose check boxes you select below. **Note:** This button is hidden if this optional functionality is not enabled for you.
Add Exception *button*	Opens the Add Exception dialog box, where you can add an Exception for the day(s) that you have selected in this view. **Note:** This button is hidden if this optional functionality is not enabled for you.
 **Print Schedule** *button*	The Print Schedule button displays a Print Preview window of the agent's schedule for the current

Control	Description
	week, including all details. Click **Print Schedule** to start the standard Windows print process for the currently displayed schedule.
check boxes	Select the check box in the table's first column for each day for which you want to create trade proposals or add exceptions. Then, click Create Trade Proposals or Add Exception.
Date	Shows each date during the week.
and icons	Click the icon to display the details for this date in a "drop-down" format. Click the icon to hide the details.
Paid hours *for this date*	Shows how many hours of paid work you are scheduled for on each day.
Schedule Details *for this date*	Shows what activities you are scheduled to perform each day. This column also shows break information.
Start Time *for this date*	Shows when you are scheduled to start your shift and the start time for each activity and break during your workday.
End Time *for this date*	Shows when you are scheduled to end your shift and the end time for each activity and break during the workday.

Back to Top

Add Exception Dialog Box

To add an exception to your schedule, select day(s) in the schedule, and click the Add Exception button. The **Add Exception** dialog box appears, with the following controls:

Control	Description
Exceptions *drop-down list*	Select an exception from this list, if it is configured to appear.
Full Day Exception *check box* (read-only)	If the selected exception is a full day exception, this check box is selected. If the selected exception is not a full day exception, this check box is cleared.
Allowed Range:	Your supervisor specifies the start and end dates in this date range. You can specify the exact start time and end time for the exception. (Specify place for exception pane) or specify a range that WFM can use to decide the start time and end time for the exception (Find place for **Exception** pane).

Control	Description
	Note: Both panes cannot be displayed at the same time.
Specify place for exception *pane*	Click this phrase to expand or minimize this pane, which contains choices that specify a start time, end time, and paid time for the exception.
Specify place for exception *fields*	Select or enter hours and minutes values in the drop-down fields **Start Time** and **End Time** of the selected exception. The start time must occur before the end time. The hours 12AM ... 12PM represent times in the current day; the times +12AM ... +12PM represent times in the next day. Select or enter hours and minutes values in the drop-down field **Paid Time** of the selected exception. The check box of each selected weekday is selected by default. You can clear one or more check boxes to exempt the corresponding day(s) from your choices.
Find place for Exception *pane*	Click this phrase to expand or minimize this pane, which contains choices that specify a range of possible start times and end times. WFM will make the actual choices, within this range.
Possible dates *fields*	The **Earliest Start** and **Latest End** fields are for display only; you already selected this range of days before you clicked the Add Exception button.
Possible times *fields*	Select or enter hours and minutes values in the drop-down fields **Earliest Start** and **Latest End**. The start time must occur before the end time. The hours 12AM ... 12PM represent times in the current day; the times +12AM ... +12PM represent times in the next day
Duration	Select or enter hours and minutes values for the drop-down fields.
Possible weekdays	Clear the check box for each weekday that is to be excluded as "possible"; all are selected, by default. **Note:** Weekdays that are selected in the **My Schedule** view only are available in the **Find place for Exception** and **Specify place for Exception** panes.

Back to Top

Warnings Versus Errors

If WFM displays warnings, the exception is inserted into the schedule as a pending change.

If WFM displays errors, the exception is not inserted into the schedule.

Pending Changes

WFM Web for Agents displays changes which are requested but not yet approved in a **Pending Changes** table, which appears directly below the Agent's schedule. Click the **Undo Changes** link in the leftmost column of any pending change, to cancel your request.

Other Schedules

Important

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The Trading message box, which appears near the bottom of the window, alerts you to any open trade proposals or responses.

Two panes near the top of this window control different views of agent schedules:

- **Other Schedules** pane—Displays a filterable, sortable, and searchable grid that lists other agents and their schedules.
- **My Schedule** pane—Displays your schedule information for the current week.

The Other Schedules pane lists agents and their schedules (all agents in the Enterprise, if unfiltered). Columns:

Column	Description
Agent	Displays the name of the agent whose information appears in that row. Position the cursor over a day cell to display its details in a pop-up window.
Site	Displays the name of the agent's site and (in parentheses) the site's Business Unit.
Team	Displays the name of the agent's team.
days of the week (*one column for each*)	Displays the agent's schedule information for that weekday.

Click the **Agent**, **Site**, or **Team** column header to sort the grid by the data in that column, in ascending or descending order.

The **Filter** button displays the Filter dialog box, where you can click the corresponding radio button to limit the display to one of these choices: People I work with (the default), My Shared Transport (displayed if the agent joined any shared transport), My Team, My Site, My Business Unit.

Important

The filtering options that are available to you have been configured by a supervisor or

> a system administrator.

The **Find An Agent** button displays the Find an Agent dialog box, where you can search the grid for, and highlight instances of, an agent's first name or last name.

If there is more than one page of data, use the navigation buttons **First**, **Previous**, **Next**, and **Last** to move between the pages. These buttons are grouped with a numeric indicator of your position within the pages: 1 of 1

Trading

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

The Trading message box, near the bottom of the window, alerts you to any open trade proposals or responses.

The trading windows—if your system administrator has enabled them—help you obtain more convenient schedules by trading with other agents. This help topic first describes the whole trading process (How Trading Works) and then breaks it down into steps (Requirements for a Successful Trade). For step-by-step instructions, see the Trading Windows Road Map.

Using the eight trading windows, you can:

- Create schedule trade proposals.
- Respond to other agents' personal or community trade proposals.
- Review or cancel your own trade proposals.
- Review or cancel your responses to other agents' proposals.
- View other agents' schedules or schedule details.

How Trading Works

A trade can include up to one full week of schedule days. Every schedule trade requires:

- One agent's proposal for a trade. The proposal specifies which schedule days this agent wants to trade.
- Another agent's response to that proposal. The response indicates this agent's willingness to accept the proposed trade.
- An approval. The approval can be either automatic (by WFM Web) or explicit (by a supervisor).

For some trades, the proposing agent must explicitly accept the response before submitting the trade for approval. This is always true for community proposals, which are offered to all agents within a team or site.

If a trade is approved, it executes: both agents' schedules change to reflect it, and the trade no longer appears in most trading windows. (However, all of your own proposals still appear on the My Proposals tab even after WFM Web executes the corresponding trades.)

Not all trades are approved. Under certain conditions (for example, when one agent is not qualified for the other's scheduled activities), WFM Web automatically declines a trade. If either agent's schedule is changed before a pending trade's approval, WFM Web automatically cancels the trade. If a pending trade has not been approved before the first day involved in the trade, it expires. In each of these cases, the trade does not occur

Requirements for a Successful Trade

For a trade to take place, all the following steps must occur.

- One agent creates a community or personal trade proposal.
- At least one agent responds to the community proposal or the receiving agent accepts the personal proposal.
- The proposing agent accepts a response to a community or personal proposal. (This step is required for personal proposals only if the proposing agent specified manual approval.)
- The trade receives either WFM Web's automatic approval or a supervisor's explicit approval.

Trading Windows Road Map

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

The eight Trading windows enable you to propose schedule trades, accept or decline other agents' trading proposals, and cancel your proposals or responses. See the sections below for how to:

- Open the trading windows
- Move between trading windows
- Use the trading windows' common features.

Opening the Trading Windows

To open the trading windows from other windows, click Trading on the Menu Bar.

- If you have unanswered personal trade proposals for the currently selected week, the Personal Proposals window opens.
- If you have no unanswered personal trade proposals for the currently selected week, the My Proposals window opens.

Moving Between Trading Windows

Most trading windows include the Trading menu bar. Click tabs on the bar to move among the trading windows.

Each trading window shows a particular kind of information about trade proposals, responses, or underlying schedules. The eight trading windows are:

Trading window	Description
Personal Proposals	Shows trading proposals that another agent has proposed to you specifically.
Community Proposals	Shows trading proposals that agents have offered to all agents within your team or site.

Trading window	Description
My Proposals	Shows schedule trades that you have proposed, with their status and any responses. (Responses appear below their associated proposal.)
My Responses	Shows your responses to other agents' trading proposals, with status information.
[Trading] Schedules	If enabled, helps you identify trading partners by showing other agents' scheduled working hours. (If your system administrator has disabled this feature, the Trading menu bar does not include a Schedules tab, and you cannot open this window.) Agent days displayed with a darker background color are days that are not compatible with you, as the logged in agent. For example, an agent day in a darker background color may indicate a full-day exception that cannot be traded or a day that contains activities in which you are not skilled, which also cannot be traded.
Schedule Details Pop-Up	Clicking an agent name shows that agent's detailed schedule (activities and start/end times.
Create Trade Proposals	Allows you to initiate a trading proposal. Click create trade proposals in the Schedule Window to open this window.
Trading Comments	If your system administrator has enabled WFM for Agents to support comments, allows you to add explanatory comments to trade proposals and responses. Click the action buttons in the Personal Proposals, Community Proposals, My Proposals, or My Responses windows to open this window.

Back to Top

Trading Windows' Common Features

Most of the trading windows display information for one week at a time, with standard date selectors to move to other weeks. Most windows show up to 10 trades at a time in a table that includes some, or all, of the following columns and controls:

Column/Controls	Description
Re	In the Personal Proposals or Community Proposals window, an asterisk (*) in this column indicates that you have already responded to this trading proposal.
Dates	Shows the start and end dates involved in the trading proposal or response.
Status	In the My Proposals or My Responses window, this column shows the acceptance or approval status of the trading proposal or response.

Column/Controls	Description
Agent name	Shows the agent originating or responding to the trading proposal. Click any link in this column to view the corresponding agent's Schedule Details pop-up.
days of the week	These columns show work start/end times for each day in the proposed trade.
Total paid	Shows the total number of paid hours covered by the proposed trade.
Action *buttons*	Provides buttons to accept, decline, or cancel a proposal or response, or to respond to a community proposal.
Comment	Shows any comments attached to the proposal or response. If the trade needs to be approved by a supervisor, the supervisor can see any comments you enter when you make the trade request. Or the supervisor may enter a comment about the trade for you to read. This column does not appear if your system administrator has disabled the Comments feature.
Previous 10	Click this button to display the previous set of trades (if there are more than 10 trades).
Next 10	Click this button to display the next set of trades (if there are more than 10 trades).

Back to Top

Trading Windows for Specific Tasks

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Use the trading windows for:

- Reviewing your proposals and their responses
- Reviewing your responses to other agents' proposals
- Creating trade proposals
- Adding comments to a trade (if enabled)
- Viewing personal proposals available to you
- Viewing community proposals that are available
- Viewing other agents' schedules
- Viewing other agents' schedule details

For instructions about how to move among the trading windows and using their common features, see the Trading Windows Road Map. For a description of how trading works, see the Trading Overview.

Reviewing My Proposals and Their Responses

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Use the My Proposals window to:

- Review schedule trades that you have proposed, along with their status and any responses.
- Accept or decline responses.
- Cancel your own pending trade proposal, if you change your mind.

The window includes standard date selectors and a table of proposals, whose general controls are described in Trading Windows' Common Features.

About the Proposals Table

The table shows all of your proposals whose first day falls within the selected week. It is sorted by the first date of each proposal.

Responses appear on separate rows below their associated proposals.

- Click an agent's link in the **Agent Name** column if you want to display his or her Schedule Details pop-up.

Viewing and Changing Trade Status

The Status column tells you what the current status is for each trade proposal. Each proposal's (or response's) status determines the actions that you can take in the Action column:

Status	What it means	Actions you can take
Open	The proposal has been offered to a specific agent or to the	Click **cancel** if you want to

Status	What it means	Actions you can take
	community, and has not yet passed into one of the other statuses listed in this table.	cancel an open proposal.
Accepted	Another agent has accepted your personal proposal or responded to your community proposal.	Click **accept** on a response row to submit this trade (with this response) for approval. Click **decline** if you choose not to trade with this respondent.
In Review	Another agent has accepted your proposal and, if required, you have approved the response. But the trade could not be auto-approved. It is now awaiting a supervisor's approval.	Click **cancel** if you want to cancel your original proposal. This will also cancel the response.
Confirmed	Both you and the other agent accepted the proposal, and the trade received either automatic or supervisor approval. Your trade has executed.	None
Declined	The proposal was declined by the responding agent (in the case of a personal proposal), by a supervisor, or by WFM Web. The trade will not take place.	None
Cancelled	Either you explicitly cancelled your proposal, or WFM Web automatically cancelled the pending trade (because of changes to your schedule or the responding agent's schedule). The trade will not take place.	None
Expired	The proposal did not receive approval by the day before its first included day. The trade will not take place.	None

When you click the accept, decline, or cancel button, the Trading Comments window opens. There, you can add a comment and complete the action by clicking submit.

For further details about requirements for a trade's approval, see Trading Overview.

Reviewing My Responses to Other Agents' Proposals

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Use the My Responses window to:

- Review your responses to other agents' schedule trade proposals.
- Review the status of proposals to which you have responded.
- Cancel a pending response, if you change your mind.

The window includes standard date selectors and a table of proposals and responses, whose general controls are described in Trading Windows' Common Features.

About the Proposals and Responses Table

The table shows all of your responses to proposals whose first date is within the selected week. It is sorted by the first date of each proposal.

The Agent Name column shows the agent who posted each original proposal.

- Click an agent's link in the **Agent Name** column if you want to display his or her Schedule Details pop-up.

Viewing Trade Status and Canceling Responses

The Status column tells you the current status of each trade proposal/response pair. When a response is in certain statuses, you can use the Action column to cancel it:

Status:	What it means:	Actions you can take:
Accepted	You have accepted this personal proposal or responded to this	Click cancel if you want to

Status:	What it means:	Actions you can take:
	community proposal. Your response is now awaiting the proposing agent's decision.	cancel your response.
In Review	You accepted this proposal and, if required, the proposing agent approved your response. But the trade could not be auto-approved. It is awaiting a supervisor's approval.	Click  cancel if you want to cancel your response.
Confirmed	Both you and the proposing agent accepted the proposal, and the trade received either automatic or supervisor approval. Your trade has executed.	None
Declined	Your response was declined, either by the proposing agent or by a supervisor. The trade will not take place.	None
Cancelled	Your response was cancelled: you explicitly cancelled it, or the other agent cancelled the original proposal, or WFM Web automatically cancelled the trade because of changes to either agent's schedule. The trade will not take place.	None
Expired	The proposal did not receive approval by the day before its first included day. The trade will not take place.	None

When you cancel a response, if your system administrator has enabled the Comments feature, the Trading Comments window opens. There, you can add a comment and complete the action by clicking submit.

For further details about requirements for a trade's approval, see Trading Overview.

Creating Trade Proposals

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Use the Create Trade Proposals window to propose a schedule trade:

1. In the Schedule window's first column, select the check boxes beside the schedule days that you want to trade. Then click **create trade proposals**.

   The Create Trade Proposals window opens. Its first line lists the date(s) that you just selected.

   > **Important**
   > Some types of exceptions do not appear by name. Instead they are marked by the generic label Exception. These exceptions have been configured by the system administrator to be nontradeable.

2. Select either **This trade proposal is for an individual** or **This trade proposal is for the community**.

   Your choice determines who will be offered your proposal. The community option includes all agents on your team or all agents at your site, depending on how your system administrator has set up WFM Web.

3. If you choose the individual option, select the agent's name from the drop-down list.

   The list offers agents from your team or from your whole site, depending on how your system administrator has set up WFM Web.

   If you choose the community option, you cannot select individual names here.

4. If you choose the individual option, you can also select **Check if you want to manually approve response to this trade proposal**.

   Selecting this check box means that for the trade to take place, you must explicitly confirm the other agent's acceptance of this proposal. Clearing the box means that once the other agent accepts it, the trade will immediately be submitted for approval, without your intervention.

If you choose the community option, you cannot clear this check box. You must confirm (accept) one response to submit the trade for approval.

5. (Optional) Enter comments about this proposal in the large text box near the bottom. You can only enter comments if your system administrator has enabled the Comments feature.

6. Click **submit** to send the proposal, or **cancel** to delete it without sending it.

Adding Comments to a Trade

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Important

You can only add comments to a trade if your system administrator has enabled this feature.

Use the Trading Comments window to add comments (if you want) and then complete one of the following actions that you have begun in another window:

- Accept, decline, cancel, or respond to a trade proposal.
- Accept, decline, or cancel a response.

The Trading Comments window's heading text indicates the action that you are about to complete.

1. Type your comments into the Comments text box.

   For example, you might want to indicate your reason for declining or canceling a proposal or response.

2. Click submit to attach your comments and complete the action. (Or click cancel to discard your comments and cancel the action.)

   The window that opens after you click submit depends on what trading action you are completing:

Action completed	Resulting window
Accept Proposal, Respond to Proposal, or Cancel Response:	Opens the My Responses window.
Decline Proposal or Cancel Own Proposal:	Returns you to the previous window.
Accept Response or Decline Response:	Opens the My Proposals window.

Viewing Personal Proposals Available to Me

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Use the Personal Proposals window to examine, and respond to, trading proposals that another agent has sent specifically to you. The window includes standard date selectors and a table of proposals and/or responses, whose general controls are described in Trading Windows' Common Features.

About the Proposals and Responses Table

The table is sorted by Agent Name. It shows only proposals whose status is **Open** they have not expired, are not in review, and have not been accepted, confirmed, declined, or cancelled.

The table provides the following details:

- In the first (Re) column, an asterisk (*) indicates that you have already responded to the trading proposal on this row.
- In the Agent Name column, you can click to display an originating agent's Schedule Details pop-up.

How to Accept or Decline a Proposal

In the Action column:

- Click **accept** if you want to trade schedules.
- Click **decline** if you do not want to trade.

The Trading Comments window opens, in which you can add a comment and submit your response.

Viewing Community Proposals

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Use the Community Proposals window to examine, and respond to, schedule trade proposals offered to all agents. Depending on WFM Web's setup at your site, community proposals can be offered to all agents on your team or to all agents on all teams.

The window includes standard date selectors and a table of proposals, whose general controls are described in Trading Windows' Common Features.

Viewing Your Schedule Information

The first row of the Community Proposals view always displays your schedule information, against a differently colored background. Click on your name to view your schedule details for selected week in a pop-up window.

About the Proposals Table

The table is sorted by Agent Name. It shows only proposals whose status is **Open** they have not expired, are not in review, and have not been accepted, confirmed, declined, or cancelled.

The table includes the following details:

- In the first (Re) column, an asterisk (*) indicates that you have already responded to the trading proposal on this row.
- In the Agent Name column, you can click to display an originating agent's Schedule Details pop-up.

How to Respond to a Proposal

- In the Action column, click **respond** if you want to trade schedules.

The Trading Comments window opens, in which you can add a comment and submit your response.

Viewing Other Agents' Schedules

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Use the [Trading] Schedules window to examine other agents' schedules. This can help you identify agents with whom you want to trade schedules.

Important

You can open this window only if your system administrator has enabled it. A second setup option determines whether you can view schedules only within your own team or across all teams at your site.

About the Schedules Window

The table shows schedule information for up to 20 agents at a time, on each day of the displayed week. Agent days displayed with a darker background color are days that are not compatible with you as the logged in agent. For example, an agent day in a darker background color may indicate a full-day exception that cannot be traded or a day that contains activities in which you are not skilled, which also cannot be traded.

The table includes the following columns:

Agent Name	Click an agent's name if you want to open the Schedule Details pop-up, which shows you details about the agent's scheduled activities on each day. Click the arrow symbol next to the column title, to sort the table by this column's data.
Team	Displays the team to which the Agent belongs. Click the arrow symbol next to the column title, to sort the table by this column's data.
days of the week	These columns show one of the following for each agent on each day: a shift, working hours, Day Off, Time Off, or an exception name.

Total paid	Shows each agent's total paid hours for the week.

Important
Some types of exceptions do not appear by name. Instead they are marked by the generic label Exception. These exceptions have been configured by the system administrator to be nontradeable.

Using the Schedules Window

You can modify the display using the following options:

- To reveal any days that are hidden offscreen, use the horizontal scroll bar at the bottom of the window.
- To reveal more agents, click **Previous 20** or **Next 20**.
- To display a different week, use the date selectors at the upper right.

Viewing Other Agents' Schedule Details

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Use the Schedule Details pop-up window to help identify agents with whom you want to trade schedules. It displays details about another agent's scheduled activities, with start and end times, on each day of the selected week.

About the Schedule Details Pop-Up

The pop-up window displays schedule details for the agent and week identified along the top. The table contains the following columns:

Column	Description
Date	Each day of the selected week appears on a separate row.
Paid hours	The agent's paid hours for this date.
Scheduled activities	Names of the schedule items for this agent on this date.
Scheduled Attendance: Start time, End time	Shows the agent's scheduled start and end time for the listed activities.

> **Important**
> Some types of exceptions do not appear by name. Instead they are marked by the generic label Exception. These exceptions have been configured by the system administrator to be nontradeable.

Using the Schedule Details Pop-Up

- If some information is hidden offscreen, use the scroll bar along the right edge to reveal it.

- To close the pop-up window, click its close box in the upper right corner.
- To display a different week, first close this pop-up to restore the previous window. Then change the date in that window, and click the same agent's link in that week's display.

Preferences

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

The Preferences window displays two tabs, Preferences Overview (the default) and Availability Patterns.

Use the Preferences Overview tab (click the title) to:

- View your preferences for shifts, exceptions, days off, working hours, time off, and availability.
- Add, modify, or delete your preferences for shifts, your availability or days off.
- Enter comments associated with your preferences.

Important

You cannot edit or delete exceptions, time off, working hours, or granted preferences. If you need to change an exception or a granted preference, contact your supervisor.

Viewing Preferences or Exceptions

Each day's bar in the Preference Overview pane's Weekly Preferences grid shows preferences and exceptions as segments covering the preference or exception timesteps. The Legend indicates which colors represent exception and preference statuses.

In the Weekly Preferences grid, you can view the status of each day off, for which you made a Day Off preference. Most cells in the Day Off column will be empty, except the actual days for which you created a preference. In those cells, one of three Day Off statuses will appear: Scheduled, Preferred, or Granted.

Use the Availability Patterns pane (click the title) to:

- Create, modify, or delete availability patterns.
- Create availability preferences based on availability patterns.

The Preferences Overview pane has three main sections:

TOP—Preferences Overview link and Availability Patterns link on the left side, Weekly Preferences Grid beneath them and across the full width of the display.

MIDDLE—A Legend identifies the colors used in the Weekly Preferences Grid.

BOTTOM—The Daily Preferences table summarizes your preferences and preference status on each day. It contains a row for each week day and the following columns:

Show columns... [+]
:

Column	Description
Date	The date of the indicated day
Weekday	The day of the week.
Preference	The names of the preferences and exceptions for each day.
Start time	When each preference or exception is requested to begin. (For a Day Off, this column is empty.)
End time	When each preference or exception is requested to end. (For a Day Off, this column displays "Full Day")
Paid time	The number of paid hours in each preference or exception
Status/Reason	Status: whether each preference is Preferred, Granted, Declined, Scheduled, or Not Scheduled. See Preference Statuses and Hierarchy for an explanation of these statuses. Reason: Why WFM assigned a status such as Declined or Not Scheduled to the time off item.
Comments	If any item shown in this list has a comment associated with it, the comment appearsin this column.

Preference Statuses and Hierarchy

Before scheduling, a preference can be Granted, Declined, or Preferred. After a scheduled is built for the dates that include this preference, the status can be Scheduled (appears in the schedule) or Not Scheduled (does not appear in the schedule).

- A *Granted* preference appears in the schedule unless it is first removed or unless another preference is added that out-ranks the first one. If this happens, the status of the lower-ranking preference changes to Declined.
- A *Declined* preference does not appear in the schedule unless it is declined in favor of a higher-ranking preference and the higher-ranking preference is later removed before the schedule is built. If this happens the preference goes back to its original status, which can be Granted or Preferred.
- A *Preferred* preference appears in the schedule if it complies with the scheduling constraints and optimization settings that are configured for your site.

Show the hierarchy of preferences: [+]

1. Granted full-day exceptions.
2. Granted days off.
3. Granted full-day time off.
4. Granted availability.
5. Granted shifts.
6. Granted paid (working) hours.
7. Granted part-day exceptions, granted part-day time off.
8. Rotating patterns.
9. Preferred items (including exceptions, paid hours, and time off with preferred status).

> Important
>
> If you do not see Preferences in the menu bar, then Schedule Preferences are not enabled for your contact center.

Graphical Hierarchy

The graphical hierarchy differs from the status resolution hierarchy. The Preferences graph displays the following hierarchy, top to bottom.

Show the graphical hierarchy: [+]

- Full day Exception
- Time off
- Availability
- Part day exception
- Shift
- Working hours

Granted or Scheduled items are shown on top and Preferred items (of the same type) are shown below them.

Editing and Deleting Preferences

Use the following procedures to edit or delete a preference from the Preferences Overview pane's Weekly Preferences grid or Daily Preference list.

Important

When editing preferences, the date cannot be changed.

Editing Preferences

To edit a preference in the Preferences Overview pane:

1. Click the preference you want to edit.
2. Click **Edit**.
3. When the dialog window opens, make the appropriate changes and click **OK** to submit the entry, or **Cancel** to discard it and close the dialog window.

Notes About Editing Preferences

- If WFM can schedule your preference, the revised preference appears in the Preferences window.
- If an Availability preference cannot be edited, a warning is displayed after the Edit dialog closes and the preference remains unchanged.
- If a Shift preference cannot be edited, a warning is displayed but the Edit dialog is not closed to correct data.
- Available shift start times can differ, if a time zones, other than site time zone, is selected.
- When adding a shift to your preferences, you will see fewer available start times or possibly no applicable start times, depending on the time zone you selected. In this case, select either the site time zone or try another time zone.
- Your preferences are not guaranteed to be assigned to you unless your supervisor grants them prior to scheduling. If your preferences are not granted, WFM schedules as many preferences as possible according to the rules configured for your site.

Deleting Preferences

To delete a preference, select the preference you want to delete and click **Delete**.

Adding and Editing Shift Preferences

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Use the Preferences Overview pane to add your shift preferences:

1. Click **Add Shift**.
2. In the **Date** drop-down menu, select a date.
3. In the **Shifts** drop-down menu, select a shift.
4. Select a **Start Time** and **End Time** and check **Next Day**, if applicable.
5. In the **Comments** field, enter any applicable comments.
6. Click **OK** to submit the entry, or **Cancel** to discard it and close the dialog window.

> **Important**
> When adding a shift to your preferences, you will see fewer available start times or possibly no applicable start times, depending on the time zone you selected. In this case, select either the site time zone or try another time zone.

Editing Shift Preferences

Use the Preferences Overview pane to edit Shift preferences. See Editing and Deleting Preferences.

Adding and Editing Availability Preferences

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Use the Preferences Overview pane to add your Availability preferences:

1. Click **Add Availability**.
2. In the **Date** drop-down menu, select a date.
3. Enter a **Start Time**, **End Time** (check **Next Day**, if applicable)
4. In the **Comments** field, enter any applicable comments.
5. Click **OK** to submit the entry, or **Cancel** to discard it and close the window.

Editing Availability Preferences

Use the Preferences Overview pane to edit Availability preferences. See Editing and Deleting Preferences.

Adding and Editing Day Off Preferences

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Use the Preferences Overview pane to add your Day Off preferences:

1. Click **Add Day Off**.
2. In the **Date** drop-down menu, select a date.
3. In the **Comments** field, enter any applicable comments.
4. Click **OK** to submit the entry, or **Cancel** to discard it and close the window.

Editing Day Off Preferences

Use the Preferences Overview pane to edit Day Off preferences. See Editing and Deleting Preferences.

Availability Patterns

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

You can request availability preferences by creating *availability patterns*, which contain the start and end times you want for a week. Availability patterns are displayed in a table at the top of the Preferences pane. Your availability patterns can specify different start and end times for each day.

Tip

When adding or editing preferences, you can select your preferred time zone. When you create availability preferences, the time zone you chose is applied to the start and end times that are specified in availability patterns. The start and end time values in the pattern itself will be in the chosen time zone and do not change if the time zone changes.

Use the Availability Patterns tab to:

- Create, edit, or delete an availability pattern.
- Create an availability preference based on an availability pattern.
- Display the Preferences Overview tab by clicking that link.

Creating Availability Patterns

To create a new availability pattern:

1. In the Preferences window, click **Availability Patterns**.
   The Availability Patterns tab appears.
2. Click **Create Pattern**.
3. Enter a name for the new pattern in the Description text box.
4. Enter start times and end times that you want for each day of the week. On each day's row, use the time controls to enter start and end times (in hours and minutes).

> **Tip**
> You can not leave start and end times blank.

Times are displayed in 12- or 24-hour format, depending on your computer's regional settings. Use the `Next Day` check box to indicate that the end time falls within the next day.

5. After you have entered the information, click **Apply**.
   The new pattern is now included in the Select pattern drop-down list.

Editing Availability Patterns

To edit a previously created availability pattern:

1. In the Availability Patterns tab, select the pattern from the Select pattern drop-down list.
   The pattern properties appear in the start time and end time drop-down lists.
2. Change the start times and end times.
3. Click **Apply**.

Deleting Availability Patterns

To permanently remove an availability pattern:

1. In the Availability Patterns tab, select the pattern from the table by checking the corresponding check box.
2. Click **Delete Pattern**.

Creating Availability Preferences

To create an availability preference based on an availability pattern, see Creating and Editing Availability Preferences.

Using Patterns for Availability Preferences

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

You can create, edit, or delete availability preferences, as described in this help topic.

> **Important**
> You cannot edit or delete a Granted availability preference.

Creating Availability Preferences

You can create (add) availability preferences in two ways:

1. Use the Preferences Overview pane to enter preferences one day at a time (see the procedure below).
2. Use an availability pattern, which allows you to specify availability for a range of days at once.

Creating Availability Preferences Using Patterns

To create an availability preference using an availability pattern:

1. In the Preferences window, click **Availability Patterns**.
   The Availability Patterns tab appears.
2. At the top left, select the pattern that you want to use to create the preference.
3. Click **Make Preference**.
   The Make Preferences window opens.
4. Enter your preference **Start Date** and **End Date**.
5. Click **Apply**.

Using the Edit Weekly Preferences Window

To create an availability preference using the Edit Weekly Preferences Window, follow the instructions in Adding and Editing Availability Preferences. When you create the preference, select the **Availability** check box.

Editing Availability Preferences

To edit availability preferences:

- Use the Preferences Overview pane to edit preferences one day at a time. See Editing and Deleting Preferences.
- Use an the Availability Patterns pane to edit availability for a range of days at once. See Editing Availability Patterns.

Deleting Availability Preferences

Use the Preferences Overview pane to delete preferences one day at a time. See Editing and Deleting Preferences.

Time Off

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Use the Time Off pane to:

- View your requested time off in the calendar, with its status.
- Request time off.
- Remove time-off requests that have not yet been granted or scheduled.
- View your time-off balance for any desired date.

To use Time Off:

- Click **Time Off** in the Menu bar.

The Time Off pane includes:

- A drop-down list with all the time-off types available to you.
- The time-off balance pane.
- A 12-month calendar for the current year.
- A legend, explaining the significance of the colors used in the calendar.
- Four command buttons (**New**, **Edit**, **Recall**, and **Delete**) that you can use to make, change, or delete time-off requests. These buttons are displayed in the top-left corner of the Time Off pane.

Tip

If you do not see **Time Off** in the Menu Bar, then the Time Off Planner is not enabled for your contact center.

Time Off Pane

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

The Time Off pane includes two main sections:

1. The balance pane, which shows your time-off balance for the time of time off that you select in the drop-down list in the upper left corner of the Time Off window. The legend, which is at the bottom of the balance pane, indicates what each color means.
2. The calendar, which shows time-off requests and their status. Days for which you have time-off requests are shown in color. This color changes depending of the status of the request.

Time Off Calendar

Each date on the calendar has a check box next to it.

- To create a new time-off request, select one or more check boxes and then click **New**. For more information about how to create a new time-off request, see Requesting Time Off.
- To change an existing time-off request, select one or more check boxes next to dates that have time-off requests entered for them and then click **Edit**. For more information about how to edit an existing time-off request, see Editing Time Off.
- To recall a time-off request, select the check boxes for one or more dates that have time-off requests attached to them and then click **Recall**. For more information about the Recall feature, see Recalling a Time Off Request.
- To delete a time-off request, select the check boxes for one or more dates that have time-off requests attached to them and then click **Delete**. See Deleting Time Off for more information about deleting a time-off request.
- To display all existing time-off data for a particular day in the Calendar, hover the cursor over that day's cell. A pop-up window displays all the time-off data that exists for that day, which can include: Date, Name, Start/End Time, Status, Reason, Comments.

Comments are notes that are entered by a supervisor or manager when the time-off item is either granted or declined.

Reason is a field that explains why the WFM system put the time-off item in a particular status such as Declined or Not Scheduled.

Balance Pane

To see your balance for a specific time-off type, select the time-off type from the drop-down list at the top left part of the Time Off window.

> **Important**
> The information in the balance pane is for the selected time-off type only. Use the drop-down list box to select a different time-off type, to see your balance for that type. Inside the list box, the time-off types that you can request and edit are listed above the "—*Others*—" legend, and the time-off types that you cannot use are listed below it.

Back to Top

This table explains each category that appears on the balance pane.

Time Off Hours Section	Accrued	Total accrued time-off hours for the current period, up to the selected day. (To view the total accrued hours for the entire period, select the last day of the period.)
	Bonus	Total bonus time-off hours. Bonus hours are configured by your supervisor or scheduling manager. They are included in your total time-off balance.
	Carried Over	Total time-off hours carried over from the previous period. Some companies limit the number of hours that you can carry from one year to the next.
	Credit	Total time-off hours that can be taken in advance, if applicable. (Some companies allow you to request more time off than you currently has accrued, with the expectation that you will accrue the necessary time before the end of the year.
	Scheduled	Total scheduled time-off hours for the period, up to the selected day. To view the total scheduled hours for the entire period, select the last day of the period. You

		cannot remove Scheduled or Granted time off in Time Off module, but can remove Preferred time off.
	Granted	Total requested time-off hours that have been granted. To view the total granted hours for the entire period, select the last day of the period.
	Exceptions	Total part-day exceptions used as time-off hours that have been granted.
	Preferred	Total hours of *preferred time off* (requested, but not yet declined, granted or scheduled). To view the total preferred hours for the entire period, select the last day of the period.
	Balance	Total time-off hours for the current period, up to the selected day. The balance is calculated as the sum of accrued, bonus, carried-over, and credit hours, minus granted, preferred, exceptions, and scheduled hours. Note that the limit to this balance can be exceeded. If the limit is reached before the end of the Accrual Period, an agent can progressively accrue more time off if he requests it, and his Supervisor grants it.
	Accrual Period Total	Total hours of time off for which you are eligible in the current period. This value changes only when you select a day in a different time-off period.
	Lead Time (weeks)	If the supervisor has enabled time-off auto-granting, you can enter your time-off preferences at least this number of weeks before the first desired time-off date. Your preferences are granted automatically if your absence would not excessively burden the company, and if you have enough time-off hours available to cover the request.
Legend		Each status—Declined; Granted; Preferred; Scheduled, Recalled; Scheduled; Not Scheduled; Recalled; and Partial—is represented by its own color. *Partial* indicates a part-day time-

		off request.
Bidding Periods	Name	The name of the bidding period. This box shows all of the bidding periods that are configured for the selected year, but not yet processed.
	Start	The bidding period start date and time.
	End	The bidding period end date and time.
	Processed on	The date and time on which requests for this bidding period will be processed.
	Minimum Days in Requests	The minimum number of days per request.
	Click to see attached message (link)	When clicked, this link opens a dialog containing notes or additional information about the bidding period. **Note:** The link is not present if supervisor does not add notes.

Back to Top

Each date in the calendar is also a link. Click the date link to update the balance pane so that it shows your time-off balance for the date you clicked instead of for the current date. For example, click the date for the day before you would like to take a vacation to see whether you will have accumulated enough time off by then to take your vacation.

Important

- The information is for the current time-off period. This is the time since the last carry-over date (often January 1), or, if the carry-over date has not yet occurred, the time since your date of hire. The carry-over date might be different for the different types of time off.
- If there are no bidding periods configured for the selected year, the **Bidding Periods** information is not displayed.

When Time Off Types No Longer Apply

A drop-down list box in the upper-left corner of your Time Off Planner displays all the Time Off Types that are configured for your site. Some of these may not relevant for you. (Agents are assigned to Time Off Rules, which in turn are associated with Time Off Types.)

You can create, edit, delete, or recall time-off requests only for types that correspond to a Time Off

Rule assigned to that agent. So, you might be able to view Time Off Types that correspond to Time Off Rules that are no longer assigned to you. You can see these "old" Time Off Types, but you cannot interact with them. They appear below the —*Others*— legend in the drop-down list.

The Time Off Types that you can use appear above the "—*Others*—" legend.

Workforce Management enables you to select a Time Off type from below the "—*Others*—" legend in the drop-down list box, but you will not be able to perform any tasks with it (such as requesting time off or viewing your time-off balance).

Back to Top

Time Off Limits Grid

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

The Time Off Limits grid appears above these dialog boxes: Inserting New Time Off Items, Editing Time Off Items.

The grid area displays time-off limit information for the dates that were selected in the main time-off planner view. Each day of the agent's schedule appears in a separate row, divided into timesteps. Dates that are not in sequential order are visually separated by empty narrow rows.

Grid Columns and Controls

The **check box** in the leftmost column of each row is clear to affect only this row. Select or clear the check box in the header to operate all check boxes in the column (and thus, all rows) with one click.

Date displays the date and weekday for each row.

Time steps displays each timestep as a cell in a grid. Point the cursor at a timestep to display the time off limits for that timestep in a pop-up window.

Full view check box above the grid expands and compresses the display.

- Select this check box (the default setting) to compress the display: each hour in the grid gets a header title.
- Clear this check box to expand the display: each 15-minute timestep gets a header title, and each cell in the grid displays its time-off limit value as an integer rounded downward.

Grid Characteristics

Each cell in the grid presents a color code for the time-off limit of the timestep that it represents:

- **Red**—The time-off limit for this timestep is 0 or less.
- **Green**—The time-off limit for this timestep is 1 or more

Variable Grid Characteristics

If you are entering new Time Off items:

- All check boxes are selected by default.
- The new Time Off items that you insert apply only to dates that are checked in the grid.

If you are editing Time Off items:

- The check box column of the grid does not appear, which means that the individual check boxes for each row do not appear.

Important

If you are deleting or recalling Time Off items, the grid and the Full View check box do not appear.

Requesting Time Off

> **Important**
>
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Use the Time Off Calendar to add a new time-off request, or to recall an existing request.

Making a Time-Off Request

1. Select the check box next to each date for which you want to add a time-off request.
2. Click **New**.
   The Inserting New Time Off Items dialog box opens. The Time Off Limits grid appears at the top of this dialog box. In the grid, Timesteps that this agent cannot select (because of limits or constraints) are colored red.
3. Select the time-off type from the drop-down list.
   Time Off types which appear below the "—*Others*—" legend in the drop-down list box in the Time Off window are unavailable to you and cannot be selected.
4. If this is a request for a full day off, select the **Full Day** check box.
   If you work a different number of hours on different days of the week, you must enter the number of paid hours here, so that the system deducts the appropriate hours from your time-off balance.
5. Specify the exact hours and minutes in your full day by entering or selecting them in the **Paid Time** drop-down list box. Note the following prerequisites:
   - You must select the **Full Day** check box and the **Paid Time** check box.
   - Workforce Management must be configured to enable agents to enter paid time for full-day time-off requests. This setting is configured by your system administrator.
6. For part-day requests, clear the **Full Day** check box and enter a start and end time for the request.
7. Click **Submit**, or, to discard a request, click **Cancel**.

> **Important**
>
> - If WFM successfully processes your requests, the Time Off window reappears and

displays your new time-off settings.

- If the server returns error messages, WFM opens a window containing the errors in a list. Click **Close** to return to the main Time Off view.
- WFM declines time-off requests that violate the terms of the agent's contract. If specifically configured to do so, WFM also declines requests that fall on a day with a granted day off, granted availability with duration of `0` in the Calendar, or a rotating pattern day off.

See other Time-Off related topics:

- The Time Off Autogrant Feature
- Time-Off (Vacation) Bidding
- Wait-Listing Notes

Back to Top

The Time Off Autogrant Feature

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

If your supervisor enables autogranting, your time-off requests are immediately granted and published to the Master Schedule in certain conditions:

- The feature is enabled. Consult your supervisor.
- All the requested days come after the specified lead time. The lead time is shown on the balance pane.
- The time-off request is for more hours than the minimum required for the auto-grant feature to apply.
- Your absence does not exceed time-off limits established by your supervisor.
- You have accrued enough time-off hours to cover your time-off request.

If the auto-granting feature is disabled, your time-off requests are entered in Preferred status and a supervisor must grant your requests before they can be included in your schedule.

Some conditions apply to only full-day or part-day time-off requests:

- Full-day time-off requests are always auto-published.
- When a full-day time-off is recalled, WFM restores a baseline schedule if that is available.
  - If the recalled time-off itself is a baseline schedule or if a baseline schedule is not available, then WFM inserts a Day Off if the time-off was unpaid.
  - If the recalled time off is paid, then WFM schedules a compatible shift with the same number of paid hours as the recalled time off.
- A part-day time-off request must occur during the hours of the agent's shift.
- If a part-day time-off instance overlaps a part-day exception, WFM preempts and removes the exception (if configured.)
- If a part-day time-off instance overlaps another part-day time off, WFM refuses the request.

Important

- If the Time Off instance that you added has the status Granted Not Scheduled, WFM will send a notification to your supervisor.
- When you specify either start/end or paid time in a time-off request, WFM verifies the values against these configured constraints: contract availability, minimum of earliest start of all available for the day shifts, maximum of latest end of all shifts.

Time Off (Vacation) Bidding

> **Important**
>
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

When time off (vacation) bidding is enabled and you submit time off requests that fall into a configured bidding period, they are not processed right away. Instead, WFM delays granting the time off requests until the processing date. On that date WFM grants all time off requests from bidding period, based on seniority and/or rank. Time off requests that are not granted are processed, based on their submission order if there are available slots in time off limits.

When you submit time off requests that fall into a bidding period, you will see a warning dialog informing you that the submitted request falls into the bidding period. If you select **Proceed**, the time off request is submitted for later processing.

Wait-listed time off requests are processed at a later time, based on the configured time off limit or restriction, and no longer processed on a first-come, first-serve basis.

> **Important**
>
> The wait-list check box has been removed in this release.

After WFM processes your time off requests and you return to the Time Off view, you will see a pop-up dialog listing all of days, for which you requested time off. Hover your mouse over a specific day to see the request details, including its status (for example, whether or not the request has been granted). You can do this for any time off request; not just the time off requests that fall within a bidding period.

Editing Time Off Items During Bidding

Be aware, when you delete or recall any time off item in a batch that WFM performs the action on all of the items that were submitted in that batch, considering it one request. Also, items from the same batch can only be selected or deselected together, not separately.

Time Off Balances

Time off requests that are created and granted when the time off bidding feature is enabled, appear as regular time off items and impact your time off balances for that specific time off type, in the same way as it did in previous WFM versions.

Wait-Listing Notes

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

If a time-off request is eligible for auto-granting but there is no appropriate time slot available, the request is "wait listed" until that time becomes available and then it is auto-granted (auto-grant must be enabled).

The wait list functionality puts into a queue agents who request unavailable time off, in the order of when each request was made. If the time slot becomes available, agents in that queue are granted their requests, in order. Ask your supervisor whether or not this process is automatic depends upon the wait list and autogrant settings that are specified by the WFM administrator.

To see how many others are present on a timestep's wait list, click the cursor on that timestep. A date-and-time information box appears, which also displays the label Wait-List followed by the number of people who are currently in the queue for time off in that time step.

In addition, the information box displays the label Time Off Limit and the corresponding number for that time step.

> **Important**
> The value shown in parentheses next to the Wait-List check box is the number of existing wait-listed items that are already present in the system, on the timesteps that are selected in the Start Time/End Time controls.

Editing Time Off

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Use the Time Off calendar to edit existing time-off requests.

1. Select the check box next to each date for which you want to edit a time-off request.
2. Click **Edit**.
   The Editing Time Off Items dialog box appears. It shows all time-off requests for the days you selected. By default, all are selected.

   > **Tip**
   > The Time Off Limits grid appears at the top of this dialog box.

3. Clear the check boxes for time-off requests that you do not want to edit.

   > **Important**
   > You cannot clear (or select) the check box for a Time Off type that you can no longer use. (These Time Off types appear below the "—*Others*—" legend in the drop-down list box in the Time Off window.)

4. Change the time-off settings for the requests you want to edit.
5. Click **Submit**. Or, to discard your changes, click **Cancel**.

If WFM successfully processes your requests, the Time Off window reappears and displays your new time-off settings.

If the server returns error messages, an error window lists them. Click Back to correct the problems.

Tip

You can Recall a time-off Request.

Deleting Time Off

> **Important**
>
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Use the Time Off calendar to remove previously made time-off requests.

> **Important**
>
> If a time-off request is Granted, and the auto-granting feature is off, you cannot use Time Off to remove the time-off request. A supervisor must make the change in WFM Web for Supervisors.

If the auto-granting feature is enabled, then you can remove Granted time-off that has not passed the auto-granting lead time listed in the balance pane.

For example, if the Granted time off request is three weeks in the future and the lead time is set to two weeks, then the Granted time-off request can be removed. However, if the Granted time off request is only one week in the future, then the request cannot be removed because it has passed the lead time.

To remove time-off requests:

1. Select the check boxes for the days with time-off requests you want to delete.
2. Click **Delete**.
   The Deleting Time Off Items window opens. It shows all time-off requests for the days you selected. By default, all are selected.
3. Clear the check boxes for time-off requests that you do ***not*** want to remove your time-off preferences.
   All selected time-off requests will be deleted.

   > **Important**
   >
   > You cannot clear (or select) the check box for a Time-Off type that you can no longer use. (These Time-Off types appear below the "—*Others*—" legend in the drop-down list box in the Time Off window.)

4. Click **Submit** or, to keep your time-off requests on the calendar, click **Cancel**.
   The Time Off window reappears, displaying your updated time-off settings.

Recalling a Time-Off Request

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Use the Time Off Calendar to add a new time-off request, or to recall an existing request:

1. Select the day where you requested the time off.
2. Click **Recall**.
   WFM displays your recall request(s) in the Recalling Time Off Items window, with a separate line for each day.
3. If you decide not to submit the recall request for a day in the list, clear the check box at the far left of that day's line.
4. Click **Submit** (at the lower right).

The recalled time off is marked in the calendar with the status Recalled or Scheduled, Recalled. If your company uses WFM's notification functionality, then WFM sends a notification to the appropriate supervisor. If autopublish is enabled, WFM republishes the schedule, with the time-off removed.

- **Recalled** status—Indicates that the item was completely recalled and no longer affects the agent's schedule.
- **Scheduled, Recalled** status—Indicates that the agent's recall request was received, but the item is not yet recalled. The item will remain active and in the agent's schedule until a supervisor removes the time off from the schedule.

Entering Comments

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

You can make comments when you make a preference or time-off request. Your supervisor might choose to consider these comments when deciding whether to grant or deny preferences and time-off requests.

To enter comments:

1. While creating, or editing a time off request, click **Comment....**
2. Enter your comment.
3. Click **OK** or **Cancel** to close the dialog box without saving the comment.
   The dialog box closes.

Bidding

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Use the schedule bidding window to bid on schedules. You can access a bidding scenario only during the Schedule Bidding Period (the time period between the Start Date/Time and End Date/Time for bidding).

To access a bidding scenario:

1. At any window, click the **Bidding** link on the menu bar.

   ### Tip

   If you do not see Bidding in the menu bar, bidding might not be configured for your call center.

2. At the Bidding Scenarios View, select a bidding scenario.

   ### Tip

   If no bidding scenarios are listed, there are no scenarios currently open for bidding.

3. At the Bidding Assignment Pane, perform any of these tasks:
   - Sort or Filter the view of available shifts.
   - Rank the schedules and bid on them by numbering them 1, 2, 3 and so on. You can view and revise your bids up until the End Date/Time in separate Desired or Unwanted lists

Bidding Scenarios View

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

You reached this view by clicking on **Bidding** in the menu bar.

This view displays all scenarios which are available for bidding, and you can open any of those scenarios to view schedules and assign bids. Each row in this view displays one bidding scenario, and these columns present information about each bidding scenario:

Control	Description
Scenario Name	Displays the name of a bidding scenario.
Bidding End Name	Displays the bidding scenario’s bidding end date/ time.
Days Remaining	Displays number of remaining days until the scenario closes for bidding.
Scenario Start	Displays number of remaining days until the scenario closes for bidding.
Scenario End	Displays the final date for which the schedule will be effective.

Opening a Bidding Scenario

To examine a bidding scenario, click on its link in the Scenario Name column.

The Bidding Assignment Pane for that scenario opens.

Bidding Assignment Pane

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

You reached this pane by clicking on the name of a bidding scenario in the Bidding Scenarios View.

As an agent, you can only access a bidding scenario for a specific period of time, which is known as the bidding window. The bidding window closes on the date and time that are labeled Bidding End Time in the upper left portion of the screen.

To Modify and Navigate the Display:

1. Click one of these controls: **Show controls.. [+]**

Control	Description
Sort button	Sort the rows by day of the week, earliest shift start, earliest meal start, total weekly paid hours, ascending or descending.
Filter button	Filters the rows by days of the week, days off, shift start, first meal start time.
View drop-down menu	Display schedule information in the grid below, in one of these selected formats: start/end time, shift name, total daily paid hours, meals start/end times
All button	Display all schedules regardless of how your ranked them (default).
Desired button	Display only the schedules that you ranked as Desired.
Unwanted button	Display only the schedules that you ranked as Unwanted.
Previous *n* button	Display the previous n schedules.
Next *n* button	Display the next page, which contains n schedules (except for the final page, which may contain fewer).

2. Click the **Apply** button, or click **Cancel** to abandon the dialog without making your changes.

To Rank a Schedule:

1. Select the check box in the far right column for each schedule that you wish to affect.
2. Click one of these controls to indicate your bids: **Show controls.. [+]**

Control	Description
Add to Desired button	Rank the selected schedules by adding them to the Desired view. Immediate results appear, as a ranking number in the Bid column of each selected shift. (These numbers are unique and consecutive, starting with one: 1, 2, 3, 4...)
Add to Unwanted button	Rank the selected schedules by adding them to the Unwanted view. Immediate results appear, as a [bracketed] ranking number in the Bid column of each selected shift. (These numbers are unique and consecutive, starting with one: 1, 2, 3, 4...)
Remove	Remove all selected schedules from the Desired or Unwanted current views. (You cannot remove anything from the All view.)

The Schedules Grid

The grid displays information about the available schedules. The information varies depending on the View selected. Default: **Start/End Times**. The grid columns are:

Show grid columns.. [+]

Grid Column	Description
Name	Displays the schedule name and week numbers if the schedule bid is longer than one week.
Days of the Week	Each column displays schedule information for a day of the week, depending on the View selected. The Views are named (and they display the corresponding named values) for each day's shift and total for the week: • **Shift Start/End Times** • **Shift Names** • **Total Daily Paid Hours** • **Meals Start/End Times** **Note:** Regardless of the View selection, this column can also display the name of full day activity which is not a shift and/or does not have Time defined.
#	Displays the number of instances of this exact schedule that are available to be bid on across the

Grid Column	Description
	contact center. For example, if the number in this column is 3, then 3 different agents can be granted this particular schedule.
Weekly Totals	Displays the total paid hours for the week, for each schedule.
Bid	Displays your current bid for this particular schedule.
Check box	Displays a check box for each schedule bid. How to use it: • Select a check box to select the schedule on the same line. • Click Add to Desired or Add to Unwanted to add the selected schedule to the corresponding list. • Click Remove to remove the selected schedule from the list that it is currently on. • You can select multiple schedules.

Bidding Details View

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

You reached this view from the Bidding Assignment Pane by clicking on one of the schedule names, or on a week within any schedule.

Click on the name of a multiple-week schedule name to display all weeks in that schedule.

Click on a single week within a multiple-week schedule (or on the name of a 1-week schedule) to display a single week.

Understanding the Bidding Details View

The top line of this view displays the schedule name on the left side and the schedule date range on the right side. The columns are:

Column	Description
Date	Shows each date during the week.
Paid hours	Shows how many hours of paid work you are scheduled for on each day.
Schedule details	Shows what activities you are scheduled to perform each day. This column also shows break information.
Scheduled attendance Start time	Shows when you are scheduled to start your shift and the start time for each activity and break during your workday.
Scheduled attendance End time	Shows when you are scheduled to end your shift and the end time for each activity and break during the workday.

If you click on a single week, or if the schedule contains only 1 week, the display will show a single week within the schedule.

If you click on the name of a schedule that contains multiple weeks, the display will show multiple weeks in the schedule.

Bidding Assignment Filter View

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

You reached this window by clicking the **Filter** button in the Bidding Assignment Pane.

Use the Filter dialog to limit the display of available schedules in the Bidding assignment window, in this way: Select days of the week and then a second characteristic which will apply to schedules which have shifts on those days.

1. Select some or all of the Days of the Week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) for each week. Your next selection(s) will apply only to schedules which have shifts on those days. Default setting: all days selected.
2. Select one of these three radio buttons:

Radio Button	Description
Show all	Undo all current filtering by disabling all other possible choices. Display all schedules.
By Days Off	Display only schedules which match the full Days Off that you select.
By Shift Start **And First Meal Time** (a check box that is enabled only if By Shift Start is selected)	Display only schedules with shifts that start no earlier than your **Earliest Start Time** setting and no later than your **Latest Start Time** setting, on your selected days. If you select the check box, both fields are required. Also, display only schedules that have shifts with a first meal that starts no earlier than your **Earliest Start Time** setting and no later than your **Latest Start Time** setting. If you select the check box, both fields are required.

3. Click **Submit** to apply your choices, or click **Cancel** to abandon the dialog without applying them.

Bidding Assignment Sort View

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

You reached this window by clicking the **Sort** button in the Bidding Assignment Pane.

Use the Sort dialog to display the available schedules in the Bidding assignment Window in a special order, in this way:

1. Select a day of the week and then a second characteristic which will apply to schedules with shifts on that day.
2. Select one of these radio buttons:

Control	Description
Day of the Week	Select one day only: Sun, Mon, Tue, Wed, Thu, Fri, Sat.
Earliest Shift Start	Sort by shift start time (default). Days Off are listed after all schedule days with shifts.
Earliest Meal Start	Sort by first meal start time. Schedules which contain shifts without meals are listed after all schedules which contain shifts with meals.
Total Weekly Paid hours	Sort by total weekly paid hours.

3. Select a sorting method: either **Ascending** or **Descending**.
4. Click **Submit**, or click **Cancel** to abandon the dialog without making your changes.

Bidding Assignment Desired View

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

You reached this window by clicking the **Desired** tab in the Bidding Assignment Pane.

Use the Desired View to reorder your bids for schedules that you want.

Ranking Your Bids

Your bids are already ranked when you reach this window; that happened when you clicked Add to Desired in the Bidding Assignment Window. Your most desired bid is numbered 1.

To change a single bid:

1. Select the number in the Bid column box, and enter a different number.

   > **Important**
   > If you change the rank of one of your bids and click **Apply**, the rest of your bids will be renumbered accordingly.

2. Click **Apply** to implement your change, or **Cancel** to abandon it.

Repeat as necessary to achieve the bid order that you want.

Removing Schedules from the Desired View

To remove one or more shifts from the Desired View:

1. Select the check box in the far right column of every schedule that you wish to affect.
2. Click **Remove** to remove the selected schedule(s) from the Desired View and set the bid ranking to `0`.
   or
   Click **Unwanted** to move the selected schedule(s) to the Unwanted View.

Bidding Assignment Unwanted View

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

You reached this window by clicking the **Unwanted** tab in the Bidding Assignment Pane.

Use the Unwanted View to reorder your bids for schedules that you not want.

Ranking Your Bids

Your bids are already ranked when you reach this view; that happened when you clicked Add to Unwanted in the Bidding Assignment Window. Your most unwanted bid is numbered 1.

1. Select the number in the Bid column box, and enter a different number.

   > **Important**
   > If you change the rank of one of your bids and click **Apply**, the rest of your bids will be renumbered accordingly.

2. Click **Apply** to implement your change, or **Cancel** to abandon it.

Repeat as necessary to achieve the bid order that you want.

Removing Shifts from the Unwanted View

To remove one or more shifts from the Unwanted View:

1. Select the check box in the far right column of every shift that you wish to remove.
2. Click **Remove** to move the selected shift(s) to the All View and set the bid ranking to `0`.
   or
   Click **Desired** to move the selected shift(s) to the Desired View.

Configuration

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

The Configuration window provides access to your personal information, shared transport arrangements, and the schedule exception totals. It has the following three tabs, which are described in details in the related topic:

- Personal Pane
- Shared Transport Pane
- Exception Totals Pane

The Personal Pane

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

This view displays your personal information: name, employee ID, contract, hire date, site (business unit), team, last login, and depending on whether or not you have changed it, the site or your current time zone.

If you select a time zone, other than the site time zone, the Schedule, Trading, Preferences, and Time-Off modules display information, based on the selected time zone. (See an example of the Time Zone drop-down list below).

Themes

This view also offers a graphical choice of screen-display themes, which you might know from other programs as *skins*. Themes apply a different color to various elements on the screen and are displayed as miniature versions of the Schedule view. To switch to a different theme, click on it, and wait for a few moments while WFM applies the new theme.

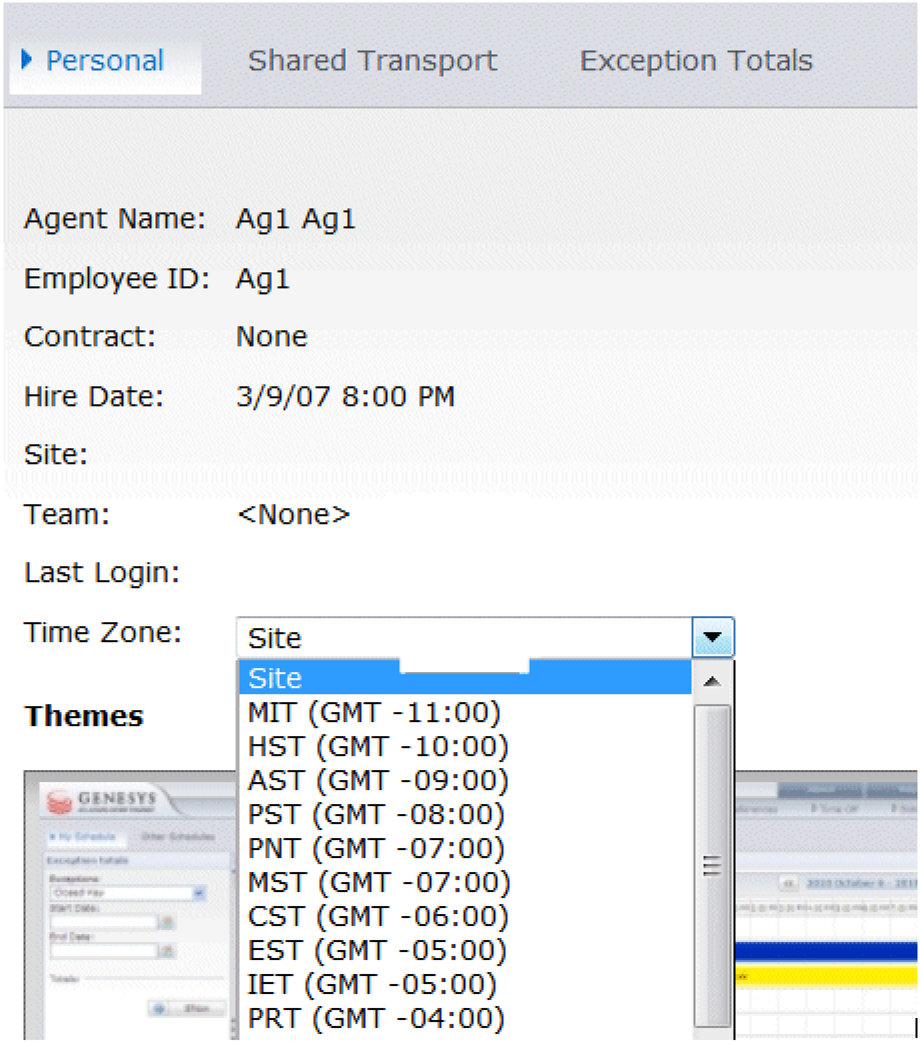

Figure: Time Zone Drop-Down List—Personal Pane

The Shared Transport Pane

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Use the Shared Transport pane to manage your participation in a shared transport group. You can use the buttons at the top of the pane to perform the following tasks:

- Create—Use this button to create a new shared transport group.
- Browse shared transport—Use this button to browse existing shared transport groups that you can filter by using the Find button.
- Delete—Use this button to delete selected items in the join requests list.

Create Button

Click the **Create** button to open a dialog box that features the following controls:

Show controls.. [+]

Control	Description
Shared Transport Name *field*	Enter the name of the new shared transport group.
Comments *field*	Enter descriptive comments, if any.
Cancel *button*	Exit the dialog box, and take no action.
Create *button*	Create the shared transport group that you have described in the two fields. The dialog box closes, and the group is added as new record in Shared Transport table with the related information for that group. You are automatically added as a participant. **Note:** Creating a new shared transport group deletes all of your pending join requests. You can belong to only one shared transport group at a time.
Help *button*	Display context-sensitive help.

Back to Top

Browse Shared Transport Button

Click the **Browse shared transport** button to open a dialog box that displays a list of existing shared transport groups. This dialog box features the following controls:

Show controls.. [+]

Control	Description
Find by *drop-down menu*	Choose Shared Transport Name, Agent's First Name, or Agent's Last Name.
Find by *field*	Enter the text that will be applied to the Find criterion. Leave this field empty to find all shared transport groups.
Find *button*	Click to apply the filter. The list of shared transport groups appears below the filter controls, with the following columns:
check box icon	Use to select a shared transport group before you click the Join button.
Shared transport *column*	Name of the shared transport group.
Agents *column*	List of the participants in the shared transport group.
Bus *column* (check box)	Specifies a bus as the transportation that is provided by company. (Agents are driven to work by company bus.) Only supervisors can create groups with Bus checked.
Comments *column*	Use to view any comments that are associated with shared transport groups.
Cancel *button*	Click to take no action and exit the dialog box.
Join *button*	Click to submit a Join request, enter comments associated with the agent join request, and close the dialog box.
 **Help** *icon*	Use to open the help topic that describes the Browse Shared Transport dialog box.

Back to Top

Delete Button

The **Delete** button is used to delete the selected agent's join requests. To delete join requests, check appropriate check box and press **Delete**.

You cannot delete a shared transport group, in which the agent is a participant—the check box will be disabled for these groups. However, you can leave your current shared transport by clicking the Leave Transport button under the **Comments** dialog box in the bottom pane. The shared transport is removed from the table and you are no longer a member of that shared transport.

Shared Transport Panes

The Shared Transport pane is divided into two other panes. The top pane includes the following columns that display information about the shared transport groups and join requests that you created:

Show columns.. [+]

Control	Description
☐ *check box* icon	Use this check box to select join requests for deletion. It is disabled for the current shared transport group.
Shared Transport	The shared transport group name.
Status	The shared transport group status (open or closed). An open status indicates that this shared transport is open for new requests. A closed status indicates that it is closed to new requests. The Status field also contains the status of the agent's join request (pending or declined).
Bus ☐ *check box* icon	Use to specify a type of shared transport group. The check box indicates the mode of transportation that is used by the shared transport group. When checked, it means a bus (provided by the company) is the mode of transportation. When unchecked, it means a carpool (created by the agents) is the mode of transportation.
Comments	Use to view the text that was entered into the comments box when the shared transport group was created.

Back to Top

The bottom pane displays the details of the selected shared transport item, such as:

- The name of the shared transport group
- The status
- The type of group (For example, if **Bus** is checked, the message "*This is a bus*" is also displayed)
- The names of all group members (including yours) Comments

It also includes the following three buttons, which enable you to perform the following tasks:

- Leave transport—Use this button to remove yourself from the shared transport group, which deletes the shared transport group if you are the only member.
- Join requests—Use this button to accept or decline requests from other agents to join the shared transport group.
- Change properties—Use this button to change the properties of the shared transport group.

Tip

These buttons are displayed only if your current shared transport group is selected. If a join request is selected, they are not displayed.

Leave Transport Button

Click the **Leave transport** button to open a Confirmation dialog box that features the following controls:

Show controls.. [+]

Controls	Description
OK	Confirms the request to leave the shared transport group and closes the Confirmation dialog box.
Cancel	Cancels the request to leave the shared transport group and closes the Confirmation dialog box.

Back to Top

Join Requests Button

Click the **Join requests** button to open a dialog box that features the following controls:

Tip

You must first belong to a shared transport group.

Show controls.. [+]

Controls	Description
This dialog box displays a list of all join requests, with the following columns:	
☐ *check box*	Use to select a request before you click the Accept or Decline button. You can select multiple requests.
Agent	Name of the agent who is requesting to join the shared transport group.
Status	Shows Pending for all requests. Accepted/Declined agents are not listed.

Controls	Description
Bus *check box* icon	A type of shared transport group. The check box Indicates the mode of transportation that is used by the shared transport group. When checked, it means a bus (provided by the company) is the mode of transportation. When nchecked, it means a carpool (created by the agents) is the mode of transportation.
Comments	Displays any comments that are associated with the Join request.
The Join Requests dialog box features the following controls:	
Accept *button*	Click to approve the selected request(s).
Decline *button*	Click to decline the selected request(s).
Cancel *button*	Click to take no action and exit the dialog box.
 **Help** *icon*	Use to open the help topic that describes the Join Requests dialog box.

Back to Top

Change Properties Button

Click the **Change properties** button to open a dialog box that features the following controls:

Show controls.. [+]

Controls	Description
Shared Transport Name *field*	Edit the name of your shared transport group.
Status *radio button*	Select either Open Shared Transport (for new requests) or Close Shared Transport (for new requests).
Comments *field*	Enter or edit comments that are associated with the shared transport group.
Cancel *button*	Click to take no action and exit the dialog box.
Submit *button*	Click to save the current changes to the shared transport group.

Back to Top

Exception Totals Pane

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Agents.

Use the Exception Totals pane to view the totals for a selected exception over a selected date range. The following controls do not define any exceptions; they only filter the display.

Controls	Description
Exceptions *field*	Select an exception type from the drop-down list.
Start Date *field*	Enter a date or select one from the pop-up calendar.
End Date *field*	Enter a date or select one from the pop-up calendar.
Show *button*	Click to display totals (in the Totals field) for exceptions that match the preceding three fields.
Totals *field*	Displays exception, period, and number of minutes on 3 lines