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# UC Connector Deployment Guide

Instant Message Scenarios

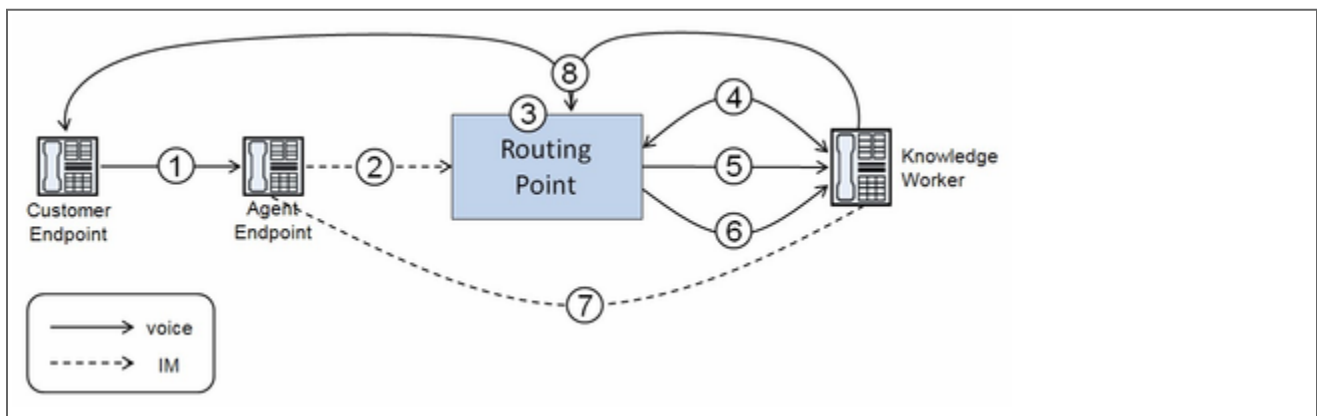
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# Instant Message Scenarios

Contact center agents can use Instant Messaging to communicate with a Knowledge Worker in the enterprise, either to approach a Knowledge Worker about a particular customer interaction, or to convey information about an existing call through an IM session (text).

## Agent Sends IM During a Customer Call

In this scenario, an agent is currently on a call with a customer when the agent starts an Instant Message with a Knowledge Worker. Once the IM with the Knowledge Worker is established, the agent can continue chatting with the Knowledge Worker—for example, to obtain some expert details to pass on to the customer on the call or they can initiate a voice connection (escalate the customer interaction) to the Knowledge Worker by transfer or conference.



A common call flow for this scenario is as follows:

1. An agent is engaged in a voice call with a customer.
2. The agent decides that a Knowledge Worker is needed to satisfy the customer interaction. From their Interaction Workspace, the agent initiates an IM to a designated Knowledge Worker Routing Point DN.
3. The routing strategy loaded onto this Routing Point DN determines how the particular Knowledge Worker is selected.
4. Presence monitoring (enabled by UC Connector ability to map UC presence status to Genesys agent states) determines which Knowledge Workers are currently available, and this information is made available to the routing strategy.
5. Using the presence information, the routing strategy selects an available Knowledge Worker.
6. Universal Routing Server (URS) sends an Interaction Preview to the selected Knowledge Workers—a screen pop arrives at the Knowledge Worker desktop, asking if they will accept the interaction.
  - If the Preview is accepted, the IM is then routed to the Knowledge Worker, and the IM session between agent and Knowledge Worker begins.

- If the Preview is declined, URS can apply default routing, or select another available Knowledge Worker for Preview, depending on the strategy.
7. The agent can then continue chatting, or the agent can transfer or conference (escalate) the customer call to the Knowledge Worker. In the case of transfers, this can be done through either of the following methods:
  8. The call is sent to a Routing Point DN with the relevant attached UserData to identify the Knowledge Worker currently handling the IM. Depending on the business rules, the strategy can then present a preview or just route the call directly.
  9. With Interaction Workspace, the voice DN of the Knowledge Worker who accepted the IM is presented as a transfer target to the initiating agent. The agent can then transfer the call directly to this Knowledge Worker, without going through a Routing Point.

The IM and the voice call are handled separately.