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Workspace Desktop Edition User's Guide

Conference A Chat Interaction

5/12/2025

Conference A Chat Interaction

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 - **1.1 Starting a Chat Conference**
 - **1.2 Starting a Chat Conference with an Active Consultation**

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

- [Starting a Chat Conference](#)
- [Starting a Chat Conference with an Active Consultation](#)

Starting a Chat Conference

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

- [Lesson: Starting an instant chat conference](#)
- [Lesson: Receiving a chat conference](#)
- [Lesson: Starting a chat conference with an active consultation](#)

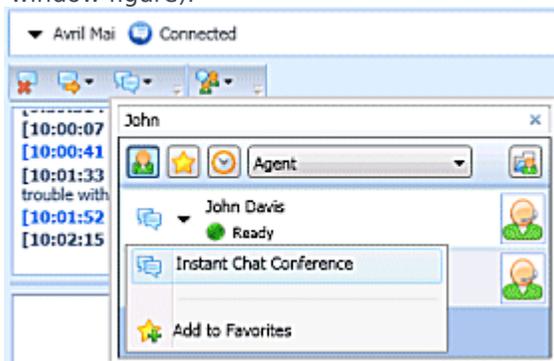
Lesson: Starting an instant chat conference

Purpose:

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

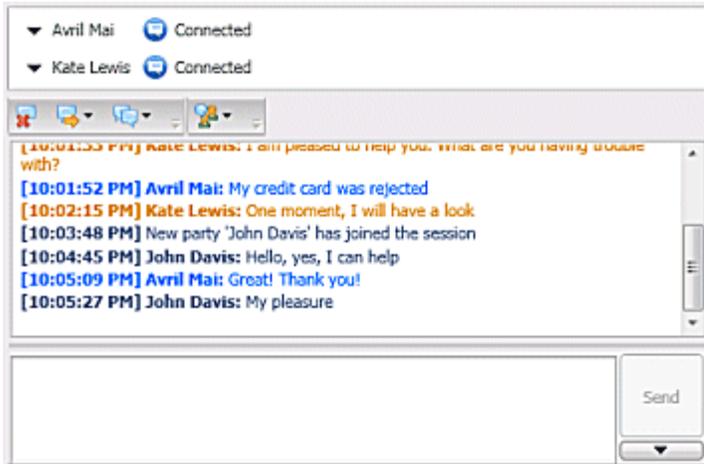
Start

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



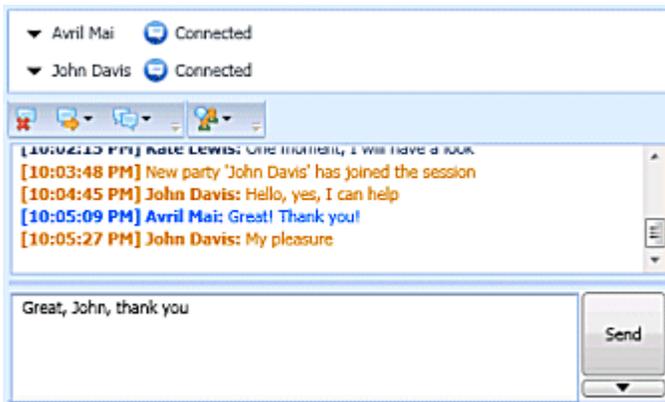
Finding an internal target for a chat conference in the active Chat Interaction window

2. Click the Action Menu drop-down list that is displayed next to the name of the internal target with whom you want to conference, and then select Instant Chat Conference. When the internal target accepts the interaction request, a Chat Interaction window opens on the desktop of the conference target. The Chat Interaction window displays the entire transcript of the chat session between you and the contact (see the Chat Interaction window on the desktop of your conference target displaying the chat transcript and connection status figure).



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

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



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

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

3. If you click the End button and the internal target agent is still connected, the session is transferred automatically to the internal target agent. If you have completed your chat interaction and the internal target agent has already disconnected from the conference, go to Step 8 of the [Lesson: Handling an inbound chat interaction](#).

End

Lesson: Receiving a chat conference

Purpose:

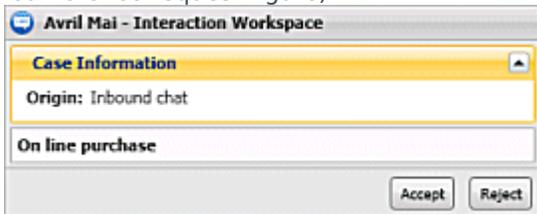
- To receive and join a conference chat interaction with another agent and their active chat interaction party.

Prerequisites

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

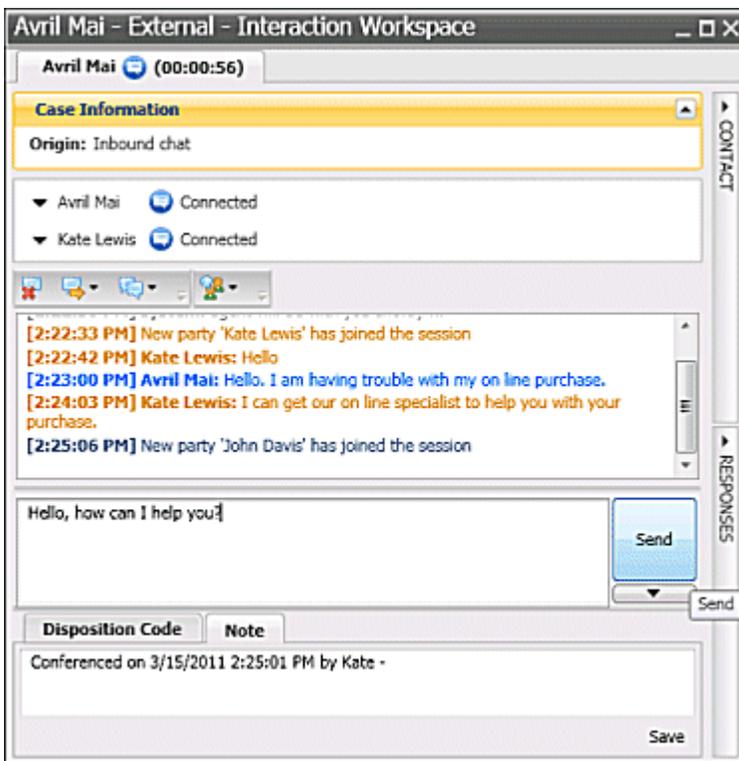
Start

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



Interaction Preview interactive notification, informing you of a conference request

Click Accept to connect to the conference. The Chat Interaction window is displayed (see the Chat Interaction window, displaying your status as Connected to the conferencing agent figure).



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

2. The Interaction Workspace Chat Interaction window enables you to perform the following functions while you are chatting with the conferencing agent and the contact:

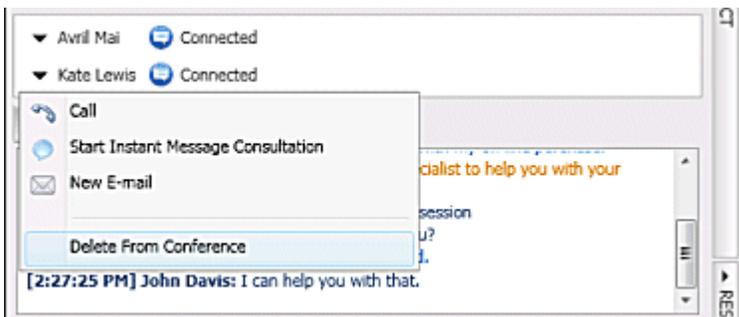
- End the connection" This function ends your participation in the consultation call; you are not added to the conference.
- Start a conference.
- Transfer the chat to a different internal target.

For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*. When you join the conference, all three parties will see any text that you enter into the Chat Interaction window. Your status is Connected (see the Chat Interaction window, displaying your status as Connected to the conferencing agent figure). When you are in a chat conference, you can perform the following functions:

- Use the Conference Party Action Menu (adjacent to the Party Status--see the Conference Party Action Menu figure) to do the following:
 - **Call**--Start a voice call to the party.
 - **Start Instant Message Consultation**--Start an IM consultation with the party.
 - **New E-mail**--Terminate the connection to the party.
 - **Delete From Conference**--Terminate the connection to the party.

For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*.

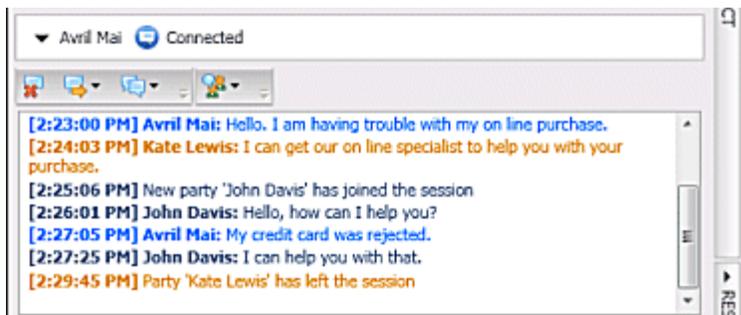
- End the chat--Terminates your connection to the conference. The conferencing agent remains connected to the contact.
- Set a Disposition Code for the chat.



Conference Party Action Menu

Remaining Connected After the Conferencing Agent Disconnects

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



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

3. Click End the Chat to terminate your connection to the conference. The Interaction Workspace Chat Interaction window is updated to display the status of the conference as Ended. If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the Disposition Code drop-down list or radio-button list in the Disposition Code view (see [Assigning Disposition Codes](#)).
4. Click Done.
5. Close the Chat Interaction window.
6. Complete your after-call work.
7. Set your status to Ready.

End

Starting a Chat Conference with an Active Consultation

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

Lesson: Starting a chat conference with an active consultation

Purpose:

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

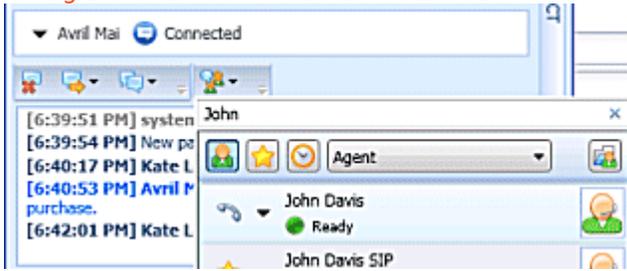
Prerequisites

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

Start

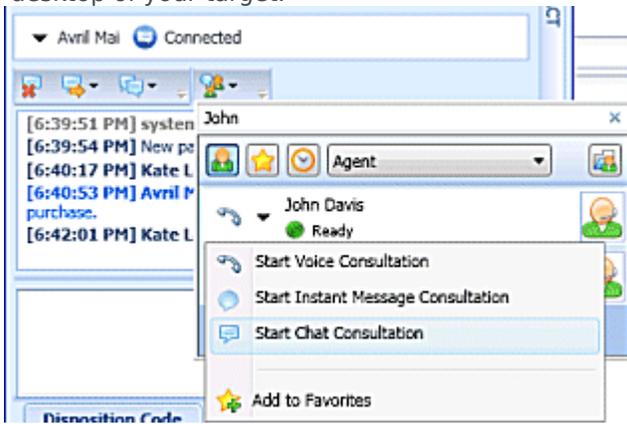
1. In the active Chat Interaction window, click the Start Consultation button and then use the Team Communicator (see the Finding an internal target for a chat consultation in the active Chat Interaction window figure) to find the internal target with whom you want to start a consultation (see the [Lesson:](#)

Using the Team Communicator feature to find an internal target).



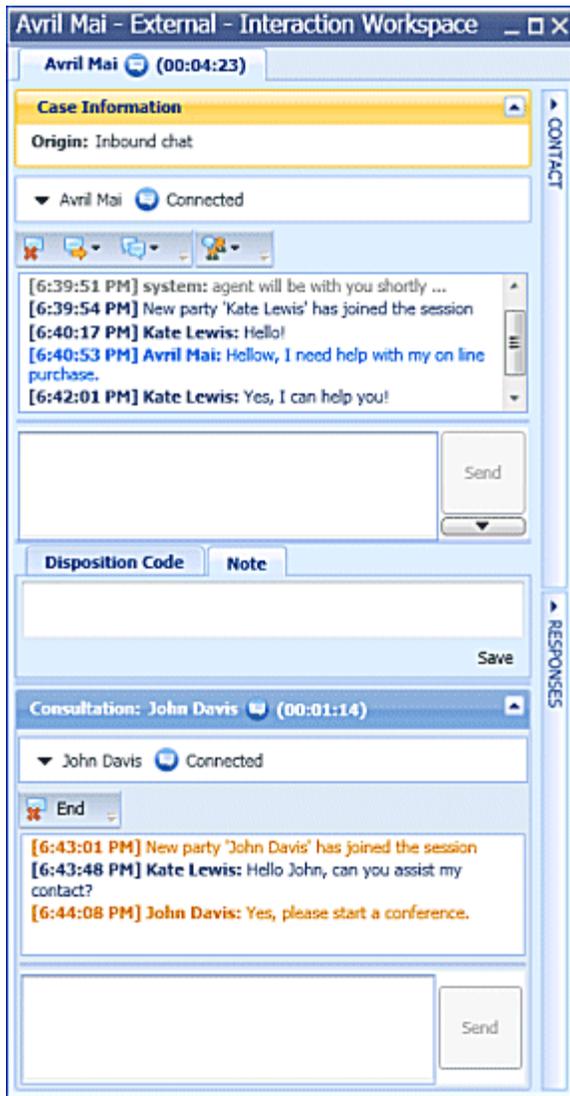
Finding an internal target for a chat consultation in the active Chat Interaction window

2. Click the Action menu drop-down list that is displayed next to the name of the internal target with whom you want to consult, and then select Start Chat Consultation (see the Team Communicator displaying a list of available consultation media figure). An interaction notification is displayed on the desktop of your target.



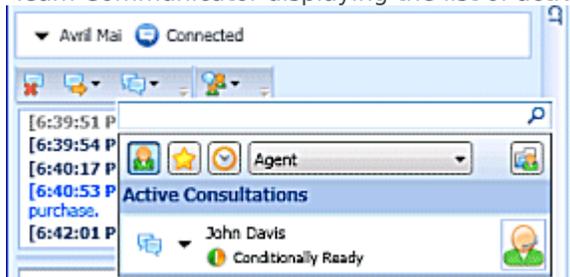
Team Communicator displaying a list of available consultation media

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



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

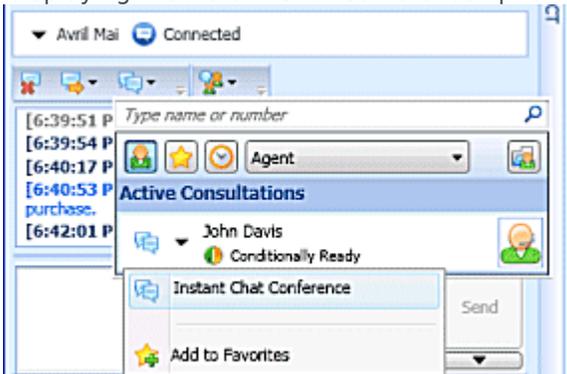
- To transition your active chat consultation to a chat conference, click the Instant Chat Conference button on the main interaction toolbar (see the Team Communicator displaying the list of active consultations figure). The Team Communicator opens and displays your active consultations (see the Team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



Team Communicator displaying the list of active consultations

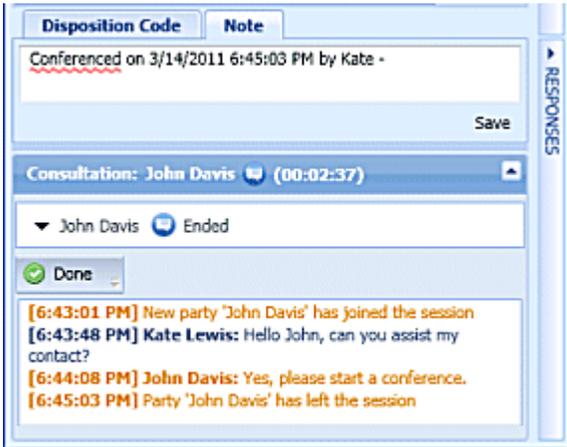
- Click the Instant Chat Conference button in the Action menu that is next to the name of the consult

party with whom you want to conference with your chat interaction (see the Team Communicator displaying the Instant Chat Conference option figure).

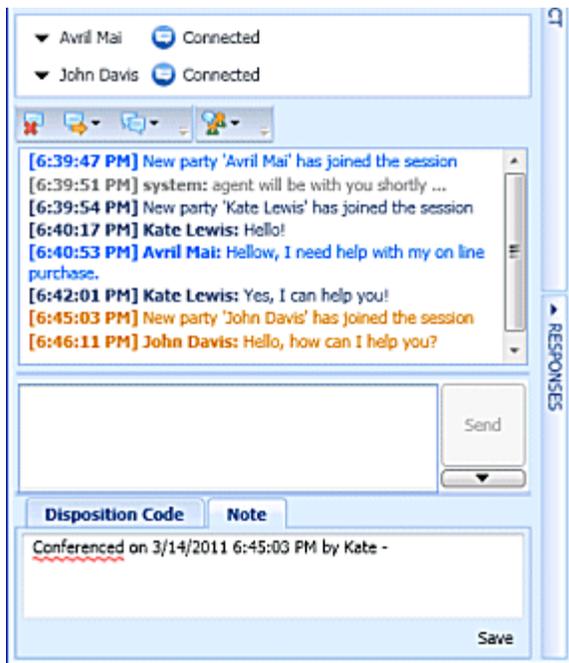


Team Communicator displaying the Instant Chat Conference option

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



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



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

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

End