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Workspace Desktop Edition User's Guide

Handle An SMS Interaction

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Handle An SMS Interaction

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In this lesson, you will learn how to handle inbound Short Message Service (SMS) interactions and how to check the spelling of your SMS messages before you send your message. This lesson contains the following sections:

- [Receiving and Handling an Inbound SMS Interaction](#)
- [Creating an Outbound SMS Interaction](#)
- [Spelling Check](#)

SMS is a text-messaging component of voice and internet communication. SMS enables the exchange of text messages between you and a contact through your computer. Typically, a contact will send you SMS from a mobile device, a web interface, or an e-mail client. By definition, SMS are *short* messages. Interaction Workspace supports 160 characters per message. If you attempt to send a message that is longer than the character limit, additional messages, each up to 160 characters, will be sent so as to accommodate your entire message. Interaction Workspace supports two SMS modes:

- **Page**--You receive a single inbound SMS to which you can send a response or handle in other ways.
- **Session**--You receive an inbound SMS that starts a chat session with a contact. SMS Session is non-real-time two-way communication between you and your contact through your computer.

Receiving and Handling an Inbound SMS Interaction

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

Lesson: Handling an inbound SMS interaction

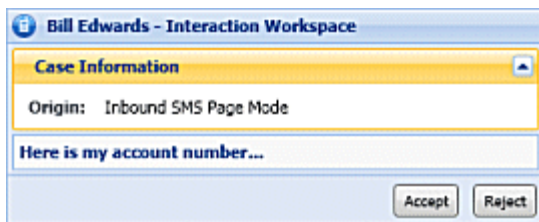
- To handle an inbound SMS interaction properly.

Prerequisites

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

Start

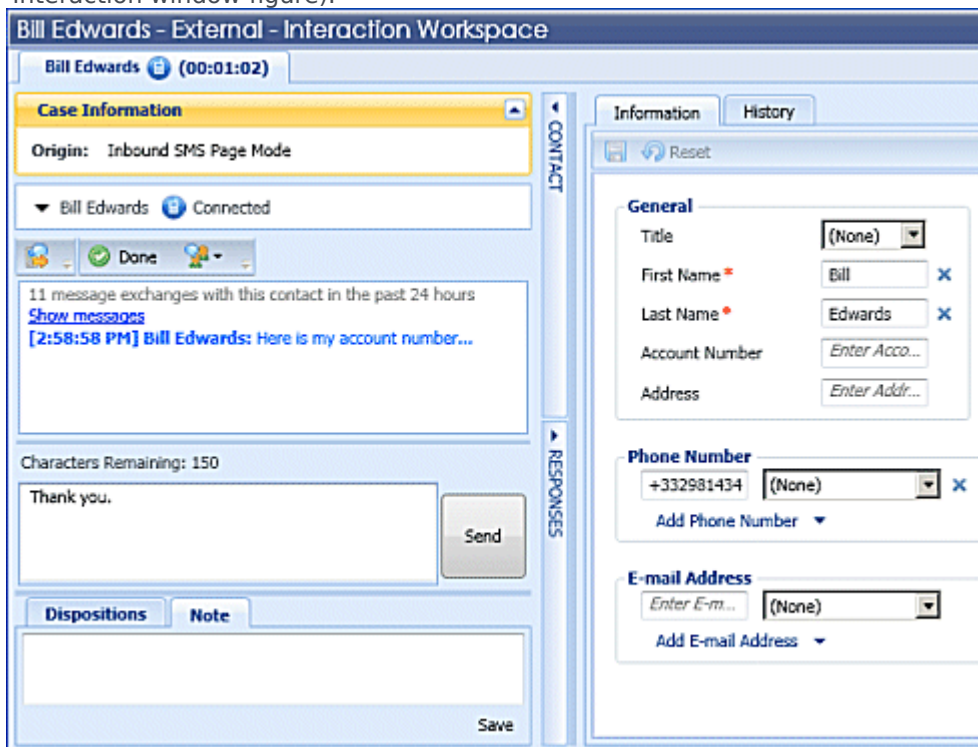
1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the SMS Interaction interactive notification figure).



SMS Interaction interactive notification

The Interaction Preview contains a summary of information that pertains to the interaction, including contact information and type of interaction. The Interaction Preview might also contain Case Information, which is part of the case data about the interaction. The Interaction Preview informs you of whether the SMS was sent in Page Mode or in Session Mode:

- In Page Mode, you can reply to the message, transfer it, contact an internal target or contact to discuss it, or mark it as Done.
 - In Session Mode, if you reply to the interaction, a chat session is started that uses the SMS channel to exchange non-real-time messages.
2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
 - Click Accept to display the interaction.
 - Click Reject to return the interaction to the queue.
 - Do nothing. The interaction will time out and be redirected.
 3. If you accept the interaction, the inbound SMS Interaction window is displayed (see the SMS Page Mode Interaction window figure).



SMS Page Mode Interaction window

The Inbound SMS Interaction window provides the following functionality:

- Compose a message/response.
- Check the spelling of your message/response (see [Lesson: Using Spelling Check to find potentially misspelled words in an SMS message](#)).
- Send a message/response.
- Call or e-mail the contact if the relevant information is available in the contact database.
- Transfer the interaction (see Step 7).
- Mark the interaction as Done.
- Set a disposition code for the interaction.
- Add a note to the interaction.
- View and edit Case Information for the current interaction.
- Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.
- View and manage contact history. See [Managing Contact History](#).
- View and manage contact information. See [Lesson: Finding and viewing an interaction in the contact database](#).

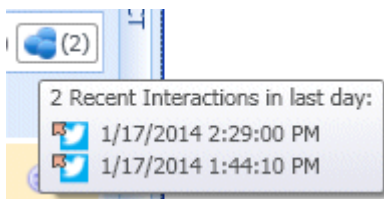
The message-transcript area of the SMS Interaction window contains color-coded, time-stamped message lines from your company's system, as well as the messages that are sent by the contact (see the SMS Page Mode Interaction window figure). If the interaction is in Session Mode, your replies are also displayed.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

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



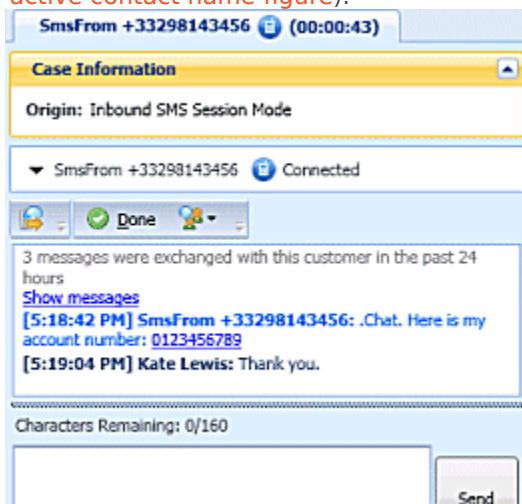
Dynamic Contact History Matrix, displaying the number and type of interactions in progress

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



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

5. To reply to your contact, enter a message in the message area, and then click Send. Your message is displayed to the contact on the SMS device that the contact is using to communicate with you. If the interaction is in **Page Mode**, after you click Send, the interaction window is closed and the interaction is automatically marked as Done, unless you are configured to set a disposition code before you close an interaction window (see [Assigning Disposition Codes](#)). Go to Step 8. If the interaction is in **Session Mode**, your message is also added to the transcript area of the SMS Interaction window. After you click Send, the SMS Interaction window is minimized. You can restore the window in two ways:
 - By selecting the interaction from the Microsoft Windows taskbar
 - By clicking it in the Interaction Bar at the bottom of the Main Window (refer to [Lesson: Using The Interaction Bar](#) for information about using the Interaction Bar)
6. In SMS Session Mode, messages that are sent by your contact are displayed together with your messages in the message-transcript area (see the SMS Interaction window Case Information, Contact Action area, toolbar, and message area figure). While you are interacting with your contact, you can use the following functionality in the SMS Interaction window:
 - Use the Notepad to attach a note to the interaction history. See [Managing Contact History](#).
 - View and edit Case Information for the current interaction.
 - View and manage contact history. See [Managing Contact History](#)
 - View and manage contact information. See [Lesson: Finding and viewing an interaction in the contact database](#)
 - View the Standard Response Library if you decide to call the sender instead of replying to the e-mail. See [Inserting a Standard Response into an E-Mail Interaction](#).
 - Call the sender by clicking the Action menu drop-down list that is displayed next to the contact name (see [the New E-Mail option in the Action menu drop-down list that is displayed next to an active contact name figure](#)).



SMS Interaction window Case Information, Contact Action area, toolbar, and message area

7. If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:
 - Instant-transfer the SMS to another internal target. See [Lesson: Starting an instant SMS transfer](#)).

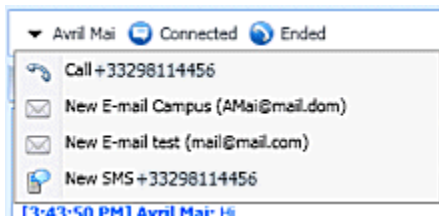
- Start a consultation with another party:
 - Start an Instant Messaging consultation. See [Lesson: Initiating an Instant Messaging session](#).
 - Start a Voice consultation. See [Starting a Voice Conference](#).
8. When you are finished interacting with your contact, click Done to stop the current SMS interaction.
- The transcript is saved in the contact history and the SMS Interaction window is closed.
 - Set a disposition code. See [Assigning Disposition Codes](#).

Warning: SMS sessions are configured to expire if no messages are sent or received within a certain interval that is defined by your administrator. Click Done to close the SMS Interaction window after time out occurs.

End

Creating an Outbound SMS Interaction

Interaction Workspace enables you to send an SMS to any device or system that is capable of receiving an interaction in this format. You can use the Contact Action menu of the Contact Directory or an active interaction to open the SMS Interaction window and create a new SMS interaction (see the Contact Action menu in an active-interaction window figure).



Contact Action menu in an active-interaction window

Unlike inbound SMS interactions, outbound SMS interactions support only Page Mode interactions. In Page Mode, you send a single outbound SMS to your contact.

Lesson: Creating an outbound SMS interaction

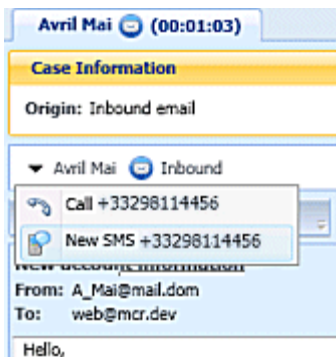
- To create an outbound SMS interaction properly.

Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).

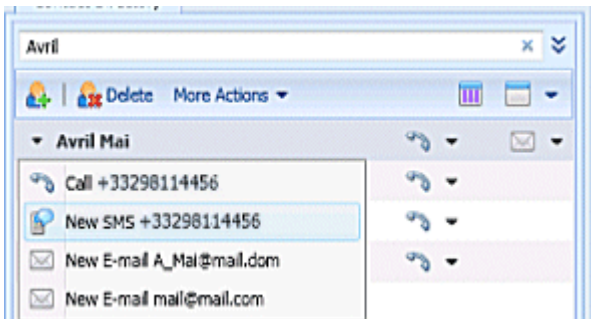
Start

1. From an active interaction, open the Contact Action menu (see the Contact Action menu in an active-interaction window figure).



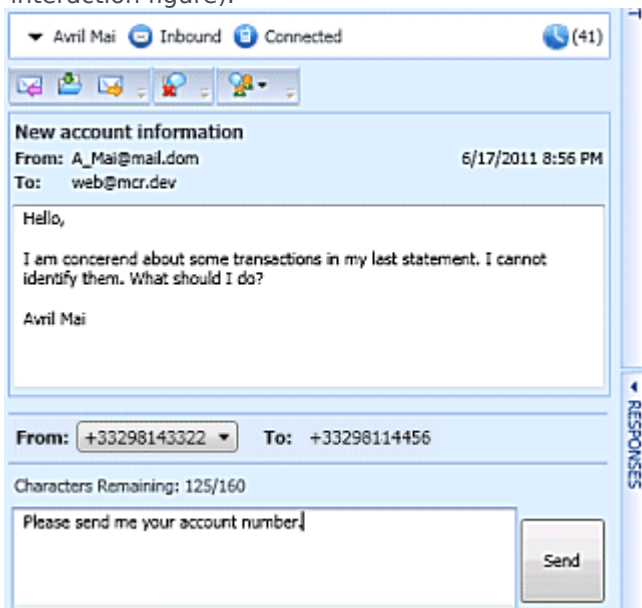
Contact Action menu in an active-interaction window

Alternately, from the Contact Directory, find a contact ([Lesson: Using the Team Communicator feature to find a contact](#)), and then open the Contact Action menu (see the Contact Action menu in the Contact Directory figure).



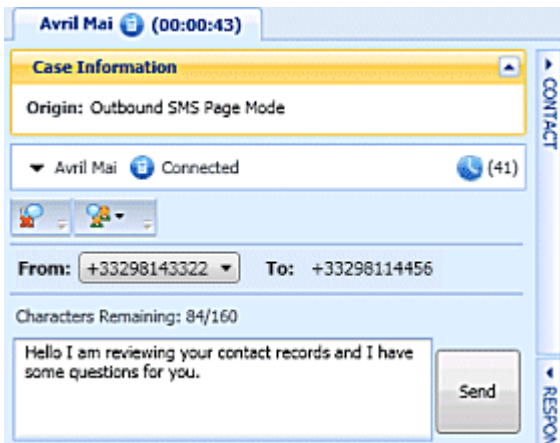
Lesson: Using the Team Communicator feature to find a contact

2. Select New SMS.
3. If you started a new SMS from an active interaction, the SMS view is displayed in the interaction window that is displayed below the active interaction (see the An SMS interaction, blended into an active e-mail interaction figure).



An SMS interaction, blended into an active e-mail interaction

If you started a new SMS from the Contact Directory, a new SMS Interaction window is displayed (see the New SMS Interaction window figure).



New SMS Interaction window

4. To send an SMS interaction (Page Mode), in the SMS text area, enter your message and then click Send. The message is sent to your contact and the SMS view or SMS Interaction window is closed.

End

Spelling Check

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

Lesson: Using Spelling Check to find potentially misspelled words in an SMS message

- To verify the spelling of the content of an outbound SMS message.

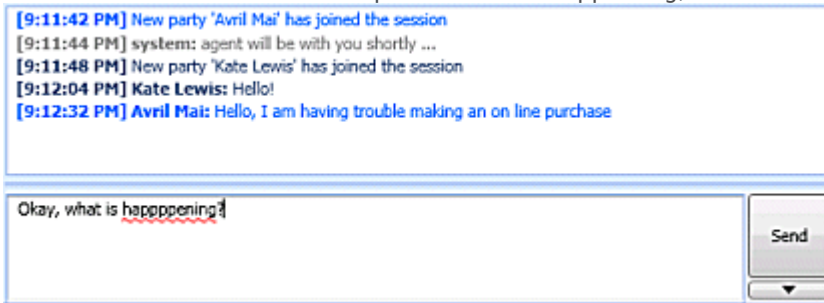
Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have an active SMS interaction (see [Receiving and Handling an Inbound SMS Interaction](#) or [Creating an Outbound SMS Interaction](#)).

Start

1. Begin to enter text in the message area of an SMS Interaction window (see [Lesson: Handling an inbound SMS interaction](#) or [Lesson: Creating an outbound SMS interaction](#)). You can enter text by typing at the insertion point, pasting content from another document, or inserting a standard response ([Lesson: Using The Standard Response Library](#)).
2. When Spelling Check is on, words in the message area that are not in the specified dictionary are underlined by a red, wavy line. The Chat message composition area, displaying a misspelled word that

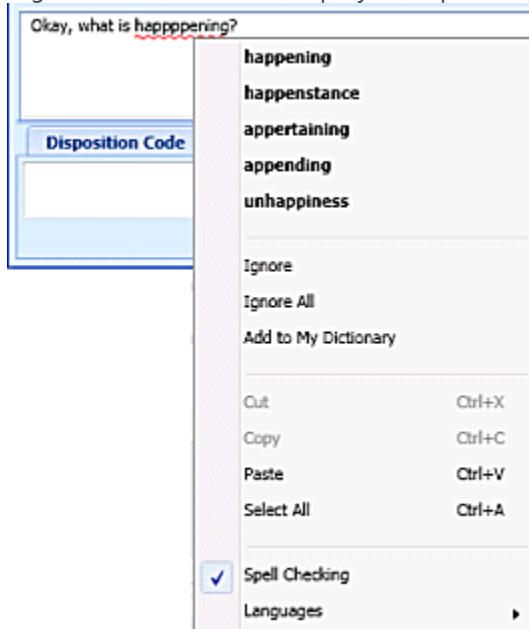
is underlined in red figure shows a chat message that contains a word that is not in the English (United States) dictionary (the default dictionary for this user). The behavior of Spelling Check is the same in all windows. The misspelled word is happening, which is misspelled as happppening.



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

3. You can correct the spelling by using one of two methods:

- Edit the word(s) manually.
- Right-click the word to display the Spelling Check menu.



Chat Interaction window Spelling Check menu

4. If you right-clicked the misspelled word to display the Spelling Check menu, you can do one of the following:

- Select the correct spelling from the list of suggestion (bold text).
- Ignore--Select to ignore this instance of the word that is not in the specified language dictionary.
- Ignore All--Select to ignore all instances of the word that is not in the specified language dictionary for this interaction only.
- Add to My Dictionary--Select to add the spelling to your personal dictionary (not your corporate dictionary).
- Spell Checking--Select to turn the Spelling Check functionality off or on.
- Languages--Select to open the list of available language dictionaries. You can select a different

language dictionary.

End