Workspace Desktop Edition Help

Inbound Email

12/16/2025

Inbound Email

[**Modified:** 8.5.113.11, 8.5.111.21, 8.5.117.18, 8.5.121.03]

> ### Tip
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The Inbound Email Interaction window enables you to handle many email–related tasks.

Use the **Zoom** control in the **Main Menu** (refer to Manage your settings and preferences) to change the size of the text in this view. This feature might not be available in your environment. [**Added:** 8.5.109.16]

> ### Important
>
> In the event that there is a problem in your contact center and connection to the servers that handle your interactions is lost, some functionality might be temporarily unavailable or you might lose the interaction with your contact. Workspace displays system messages that inform you about the status of each of your available media channels.

The Inbound Email Interaction Window

The Inbound Email Interaction window enables you to handle many email–related tasks, including the following:

- Reply or Reply All to the email.

- Review and save attached image files (for text and HTML formatted email interactions) and in-line images (for HTML formatted email interactions).

- Transfer (forward) the email.

- Forward the email to an External Resource.

- Select **Done** for the current interaction.

- Start a Voice Consultation with an internal target or with a contact.

- Start an IM Consultation (Instant Message) with an internal target.

- Set a disposition code.

- Save the email in a workbin for later handling.

- Use the Note to attach a note to the interaction history.

- Review Case Data (attached data) for the current interaction.

- Call the sender if there is a phone number in the contact database.

- Review and manage contact history. Open and handle email interactions from the contact history.

- Review and manage contact information. Your account might be set up to let you assign an interaction with an unknown contact to an existing contact in the contact database by using the Manual Contact Assignment feature [**Modified:** 8.5.117.18].

- Hide or display the controls and information about the current interaction by clicking the Hide/show Interaction view button:

Collapse	◀
Expand	▶

- Access the standard response library, if you decide to call the sender instead of replying to the email.

- Print the current email interaction.

- Schedule a Callback by clicking **Schedule Callback** () to open the **New Callback** dialog box. Refer to Genesys Callback. [**Added:** 8.5.111.21]

- Blend the interaction with other media, such as voice and SMS, by using the **Party Actions** menu.
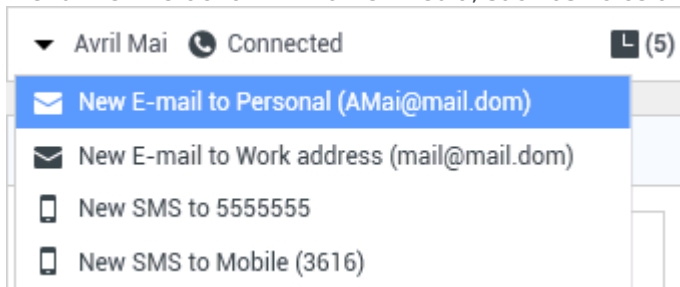
Media blending

If there are in-progress or recent interactions for the current contact, the number of interactions is displayed beside the **In-progress Interactions** and **Recent Interactions** buttons.

> **Tip**
>
> In some environments, you might have to set a disposition code before you transfer or forward an email interaction.

URLs and Security

[**Added:** 8.5.121.03] Sometimes URLs (links to websites) are sent to you by a contact. URLs in the inbound email interaction view might be plain text or they might be HTML formatted text. You can read the URL before clicking it by hovering your mouse pointer over the URL to display a tooltip that lets you review the address.

> **Warning**
>
> To avoid opening malicious web links, review hyperlinks using the tooltip before you click them.

Inserted and Attached Images

[**Added:** 8.5.113.11]

Sometimes your contact includes images as part of their email interaction.

If your contact inserted the image into the body of the email interaction, it is displayed along with the other email content. You can save the image to a local or network drive by right-clicking on it and selecting **Save image as** from the context menu.

If the image is sent as an attachment, it is displayed beside a paperclip icon above the body of the email interaction.
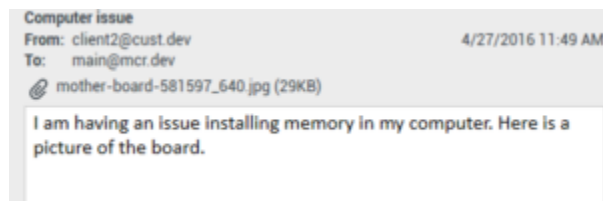
The paperclip icon indicates the email interaction has an attachment

Actions for Attached Files

Right-click the name of the attached file to perform the following functions:

- **Open** — Opens the file in the default application for the file type.
- **Save As** — Save the file to a local or network drive.

- **Print** — Print the contents of the file to a printer that you specify.
- **Save All** — Save all attachments to a local or network drive.

Transferring an Inbound Email Interaction

To transfer an email interaction that you have accepted, click the **Transfer** (▨) button. The Team Communicator is displayed. Choose a transfer target. Select **E-Mail 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 rejected the interaction.

Forwarding an Inbound Email Interaction to an External Resource

[**Modified:** 8.5.113.11, 8.5.104.15]

Workspace supports two types of email forwarding. Most companies will use one type or the other, depending on their business processes.

- **Forward** — The typical use case is that you forward an email and ask a question about it, then you use the answer that you receive to complete your response to your contact.
- **Forward as an Attachment** — The typical use case is that you want someone else to write the response to the email.

Forward

[**Added:** 8.5.113.11]

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 sometimes called in-line forwarding. A forwarded inbound email is copied into a new email interaction. The new email has a note with the date and contact name 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. Agents may or may not wait for an answer to this forward, depending upon your corporate policies and processes.

To forward the email quoted in-line in your email, click **Forward** (▨) on the active inbound email window toolbar.

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

- Start typing a name or other contact information in the address field. The Team Communicator opens and enables you to choose a target. 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 to display the Contact Search view. Use this view to perform a search of the Contact Directory for targets. The Contact Search view can also be used to add **Cc** (carbon copy) targets.

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 email body area, above the quoted content from the email that you are forwarding.

To send the forwarded inbound email in-line to the targets, click **Complete Forward Ctrl+Return** ( ). The interaction window closes on your desktop and the email is forwarded to the in-box of the external resource. Click **Cancel Forward** if you want to close the Forward Email view without forwarding the email interaction.

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.

Forward as an Attachment

[**Modified:** 8.5.113.11]

(Formerly called *Forward to an External Resource)*

Workspace enables you to forward active inbound email interactions to an external resource (someone in your company directory that is outside of the control of the Genesys environment — for example, your back office) by selecting an email address in Team Communicator, either by manually entering the address or by selecting it from a searched Contact or a Corporate or Personal Favorite. You can configure agents to be able to add additional information about the forwarded interaction in a dedicated text box.

Depending on the Business Process that your company uses, you might keep the ownership of the interaction after you forward it, and be responsible for closing the interaction.

To forward the email as an attachment to an external resource, click **Forward as an Attachment** ( ) on the active inbound email window toolbar. Depending on how your system is set up, this action might open the Team Communicator or it might display the Forward Email as an Attachment interaction view.

> ### Tip
> Your system might not be set up for all the features of Forward email. For example, the Team Communicator might not open, or the Forward Email as an Attachment interaction view might not be displayed. You might be restricted to a single **To** target, **Cc** might not be enabled, or the Instructions field might not be available.

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

- Start typing a name or other contact information in the address field. The Team Communicator opens and enables you to choose a target. Click **Add Email Address** to enter the email address of the target in the address field. If your environment is se 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.

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, click in the text box below the **To** and **Cc** fields and enter your message.

To forward the inbound email as an attachment to the targets, click **Complete Forward as an Attachment** ( ). The interaction window closes on your desktop and the email is forwarded to the in-box of the external resource. Click **Cancel Forward as an Attachment** if you want to close the Forward as an Attachment view without forwarding the email interaction.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle An Email Interaction
- Blend Different Media Into A Single Conversation
- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Outbound Email
- QA Review of Email

Top 10 pages

1. Workspace Desktop Edition Help
2. Main Window
3. My Status
4. Contact Directory