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Agent Workspace Agent's Guide

Messaging

7/26/2024

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Messaging includes the Genesys Chat, SMS, WhatsApp, Messenger, and Twitter Direct Message Digital channels. Messaging enables you to manage message-based conversations across one or more of these channels in a unified conversation.

Related documentation:

-

Important

Due to continual changes to Agent Workspace, screenshots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you can access in the product when you use it.

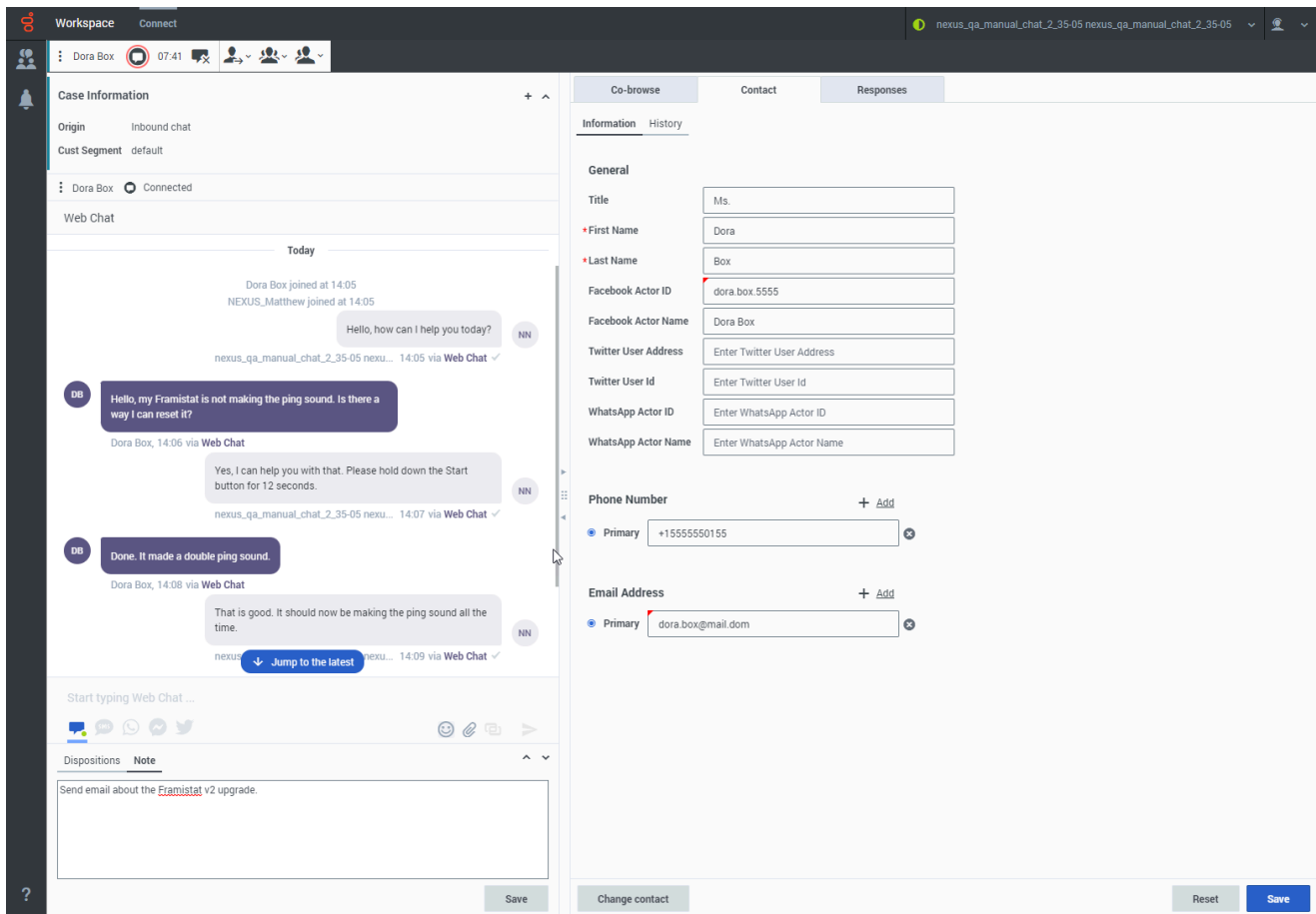
This article describes the typical options for handling, as a chat session, message-based conversations from the Genesys Digital messaging channels.

A chat session involves exchanging messages in real time with a contact. The Interaction View transcribes the conversation and allows you to review the conversation.

Chat interactions include Web Chat, SMS, WhatsApp messages, Facebook Messenger messages, and Twitter Direct Messages. Your account might also be set up to enable you to handle public Facebook and Twitter posts.

When either you or the contact ends the session, the interaction is usually closed and marked as **Done**. However, sometimes you might have to continue a conversation. Perhaps you had to take time to find additional information for the contact or start a business process in your organization before continuing the conversation.

How do I handle a message-based interaction?



The Chat Interaction view is the Agent Workspace interface that lets you exchange messages with a contact.

The Chat Interaction view includes all the controls to handle the interaction, information about the interaction (**Case Information**), and **Disposition** and **Note** tabs where you can add information about the interaction. There might also be tabs on the right side of the view that contain contact information, history, and other features.

To start receiving chat interactions, set your status on the Chat channel or other messaging channel to **Ready**.

Tip

In some environments, agent status is automatically set to **Ready** when the agent logs in. This means that chat interactions are directed to these agents upon login.

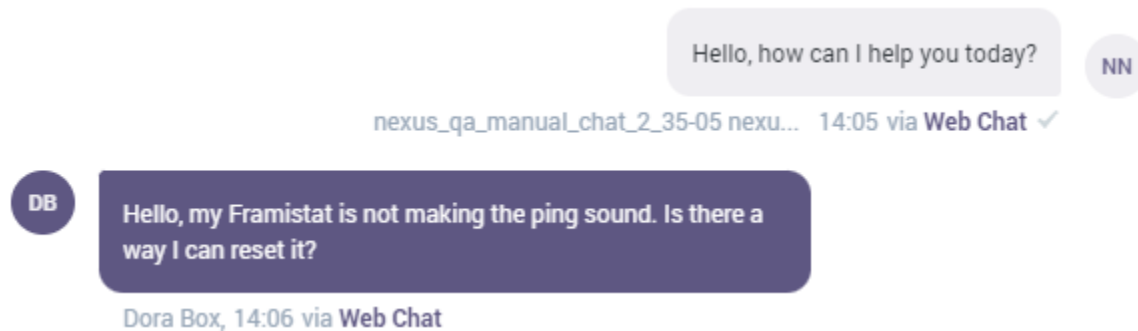
When you receive a chat interaction it is either accepted automatically, or a pop-up notification is displayed on your desktop to enable you to accept the interaction. After you accept a chat, the Chat Interaction view opens on your

Agent Workspace. While a contact is typing, a notice is displayed that they are writing a response, but not what they have written until they send it.

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

You use the Chat Interaction view to handle all message-based interactions (Web Chat, SMS, WhatsApp, Messenger, and Twitter Direct Message). You can distinguish among the different media in multiple ways:

- The color of the message blocks in the transcript
- The information provided in the **Case Information** area
- The origin text under the message block.






Can I have more than one line in my chat message?



The Agent Workspace Chat message composition field can display up to four lines at a time. It expands as you type. You can use **Shift+Enter** to add blank lines to your message. Watch this video to find out how.

[Link to video](#)

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

- To transfer the chat to someone else in your organization, click **Transfer** ().
- To start a chat conference between yourself, the customer, and someone else in your organization, click **Conference** ().
- 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 start 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.
- Click **End** () to 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, the elapsed time of the interaction and the last lines of the chat transcript is displayed. 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 starts 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?

To give yourself more room to work or to enable you to focus on just one panel, use the **Collapse the panel**, **Partially expand the panel**, and **Fully expand the panel** buttons (the little chevrons (up/down arrows)) to expand or collapse different parts of the interaction view.

Workspace Connect Monitor

Vanessa Wang 05:06

Case Information

Origin Inbound chat
Subject Refund

New party 'Carole Spencer' has joined the session 03:34 PM

Carole Spencer 03:34 PM
Hi, how can I help you today?

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...

Change contact

Co-browse

Information History

General

Title (None)

* **First Name** Vanessa

* **Last Name** Wang

Phone Number

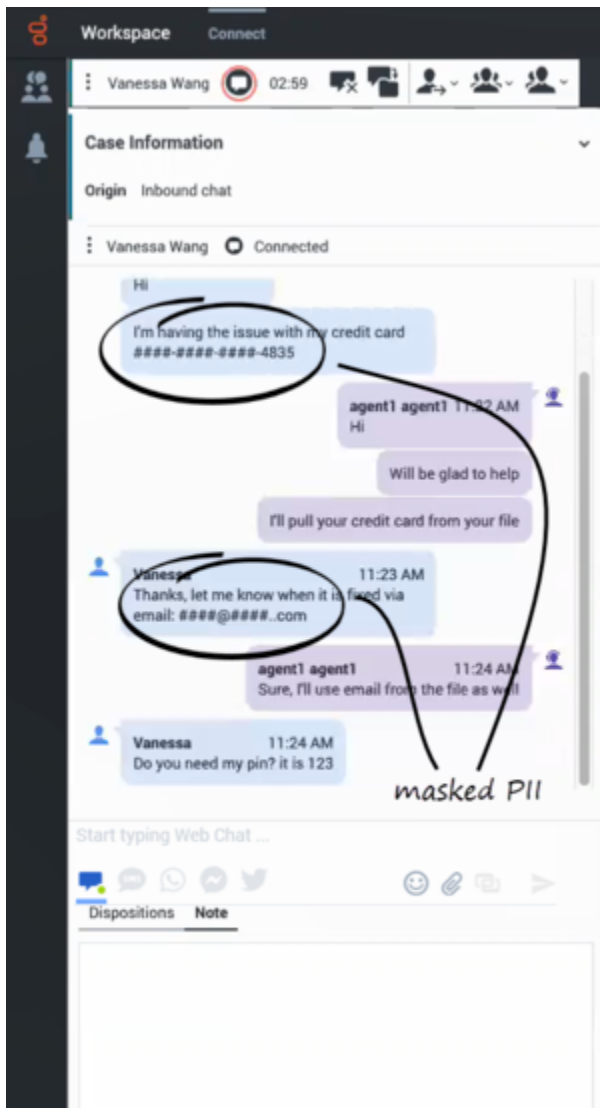
Primary +44123

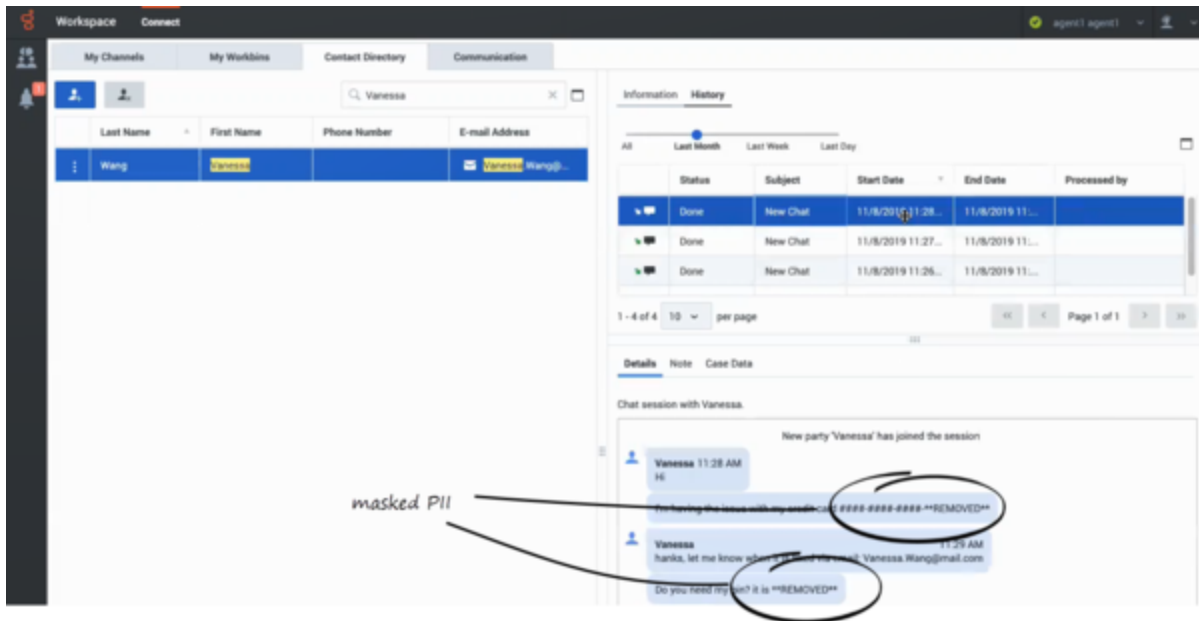
Email Address

Primary AVWan

Why are some numbers masked out?

Some organizations must comply with regulations regarding masking Personally Identifiable Information (PII) while handling contact information. Some examples of PII include credit card numbers, personal email addresses, and phone numbers. Exposing PII to agents and other individuals in an organization is a potential security risk for the contact. In some environments, Agent Workspace 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 and in the history. You might also see masked text in the **Communication** tab.





Pushing weblinks (URLs) to your contacts

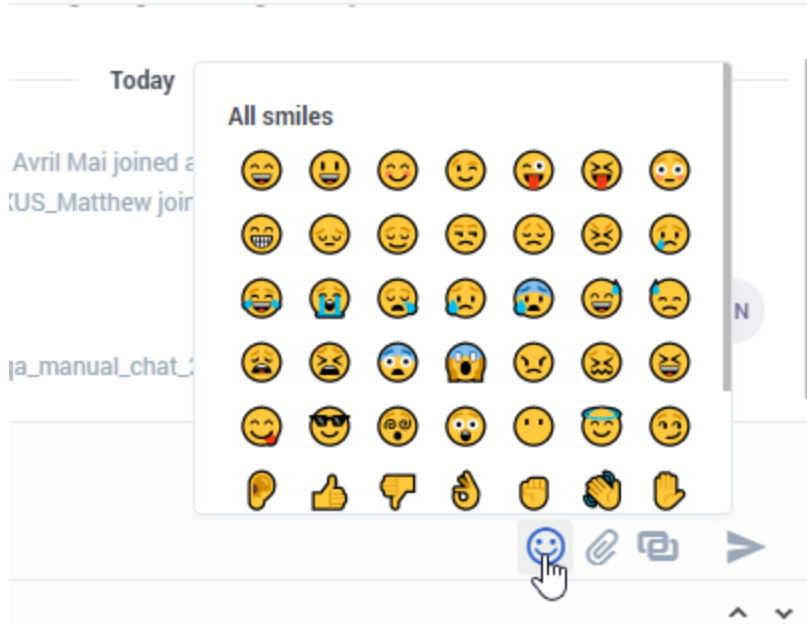
Your account might be set up to enable you to push website links (URLs) to contacts. If it is, the **Check URL** button (🔗) is displayed beneath the chat text editing area.

To push a URL to a contact, first type the URL in the chat text editing area. Agent Workspace recognizes correctly formatted URLs and enables the **Check URL** button for you. Click the button to open the URL in a new tab or window to check the URL before you send it to your contact. This way you can be sure that you are sending your contact to the correct website.

When you are sure that the URL is correct, click **Send** (➤) to send the URL to your contact.

Your contact receives a message in their chat window telling them to click the link that you sent them.

Send Emojis to Contacts

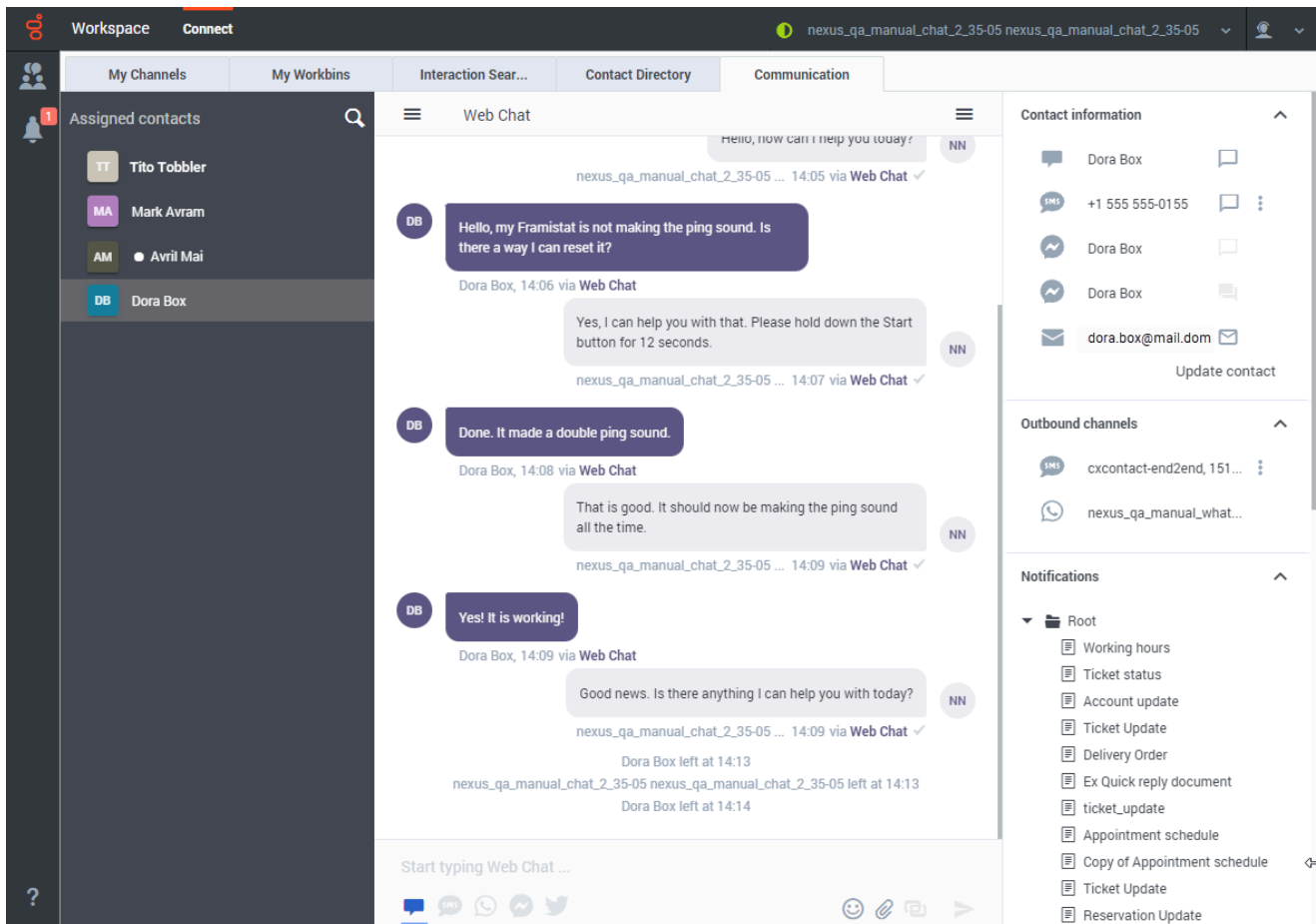


Your account might be set up to let you send emojis (*emoticons* or *smileys*) to your contact as part of the chat interaction text. Emojis are little faces and other symbols that you can use to let your contact know how you are feeling or to help them to know when something is good, funny, bad, or sad. Ask your supervisor or administrator about when to use emojis.

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.
2. Click an emoji.
3. Click **Send** (➤).

Continuing the conversation



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 organization's contacts.

The **Communication** tab has five areas:

- Assigned Contacts list
- Conversation transcript
- Contact information
- Outbound channels
- Notifications

Contacts that you have interacted with in the past are in your Assigned Contacts list. If you have not interacted with a contact in the past, or if the contact has been removed from your Assigned Contacts list, those contacts are considered *unassigned contacts*. If a contact is active on a channel, a white dot is displayed next to their name.

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 in the **Start typing Web Chat** field and enter the message you want to send, then click **Send** (➤). If the contact no longer has the browser open where they started the previous chat, you can still send your message, and the next time that the contact logs in to your organization's website the chat will continue and all the new and previous messages are displayed to the contact.

You can perform the following actions:

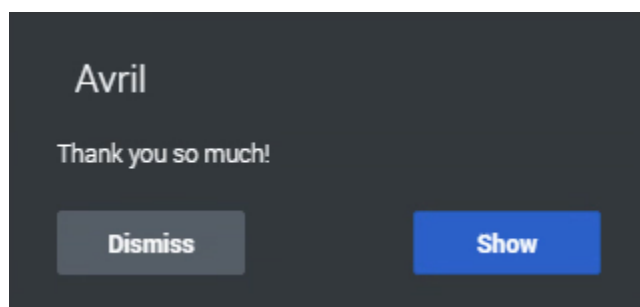
- Click **Send** (➤) to send messages you type in the **Start typing Web Chat** field.
- Click **Attach** (📎) to attach a file such as an image.
- Click **Emoji** (😊) to send an emoji to your contact.

If you want to transition the conversation to a different channel, you can select the channel by clicking one of the buttons under the **Start typing Web Chat** field.

- Click **Create chat interaction** (💬) to send a web chat message
- Click **Create SMS interaction** (SMS) to send an SMS
- Click **Create WhatsApp interaction** (📞) to send a WhatsApp message
- Click **Create Messenger interaction** (📧) to send a message through Facebook Messenger
- Click **Create Twitter Direct Message interaction** (🐦) to send a message through Twitter Direct Message

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.

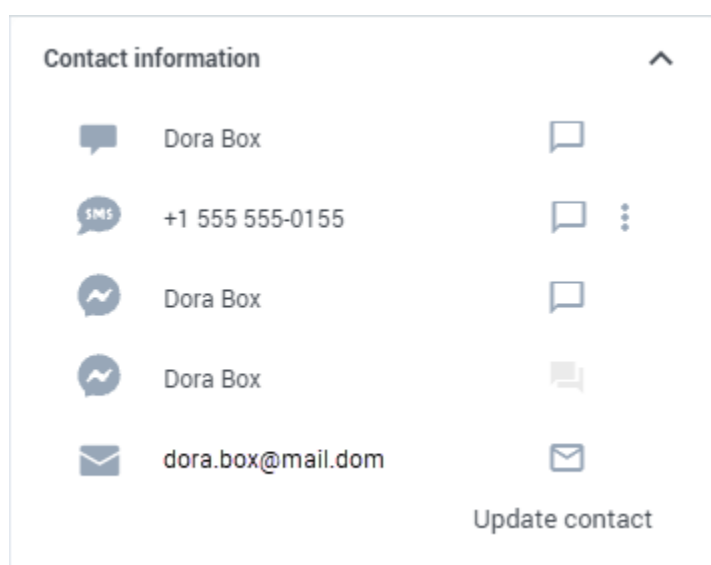


Starting a new interaction

You can start new interactions with an assigned contact by using the new interaction buttons in the **Contacts information** area. If it is not displayed in the **Communications** tab, click **Contacts** (☰) to display of the **Contacts information** area.

The **Contact information** area lists all the media that are available for the assigned contact. Not all contacts have all media available. You can create a new chat messaging interaction for Chat (💬), SMS (SMS), WhatsApp (📞), Messenger (👤), and Twitter Direct Message (🐦), by clicking the **Create interaction** button (🗨️) next to the media.

If a channel is not displayed, there are no ongoing conversations with the contact on that channel.



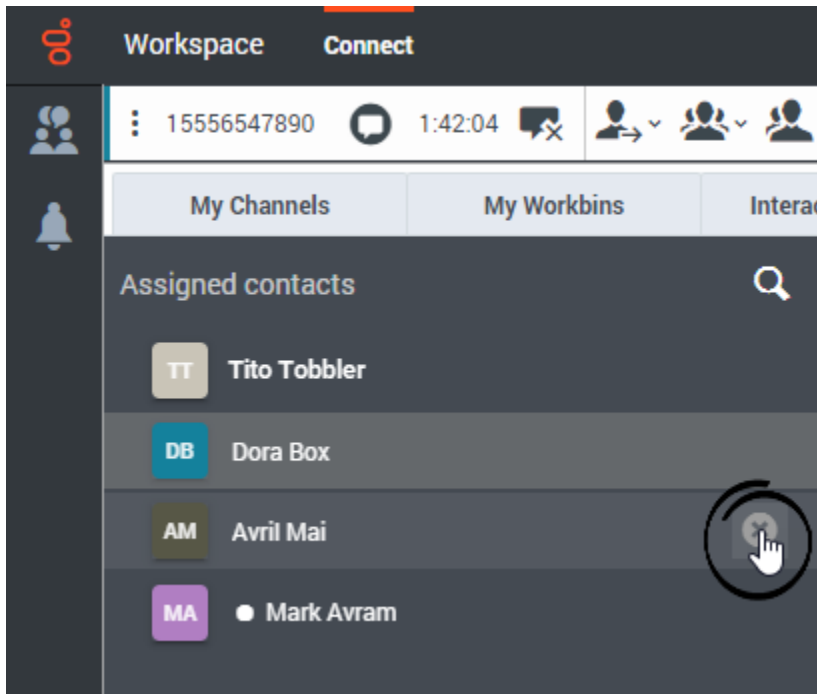
Tip

- Genesys recommends that you switch to a chat interaction window whenever you want your chatting time to be recorded for KPI purposes.
- Sometimes a Chat message you send cannot be delivered. A system message is displayed in the transcript area if the Chat message was not delivered.

Other channels, such as email and voice might also be available in the **Contact information** area. To update the view with the latest information from the **Contact Directory**, click **Update contact**.

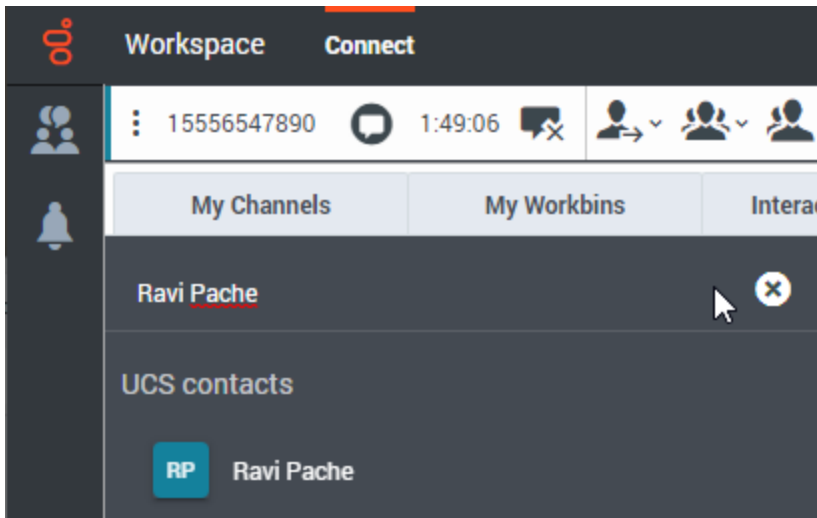
Stop following a conversation

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. To remove the conversation from your **Communication** tab, click the **X** next to the contact name.



Adding a contact to your assigned contacts

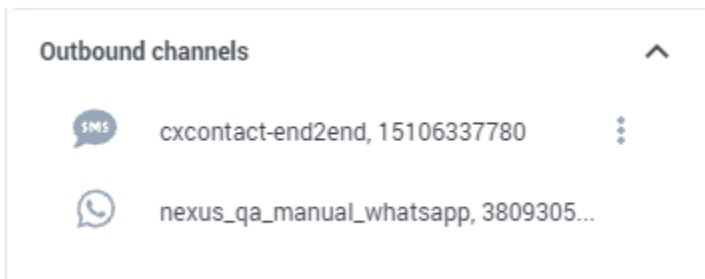
You can use the **Communication** tab to search for a contact in the Contact database by entering contact information in the search field above your assigned contacts. Click the **Search contacts** magnifying glass icon to start your search then enter the name of a contact in the **Search contacts** field.



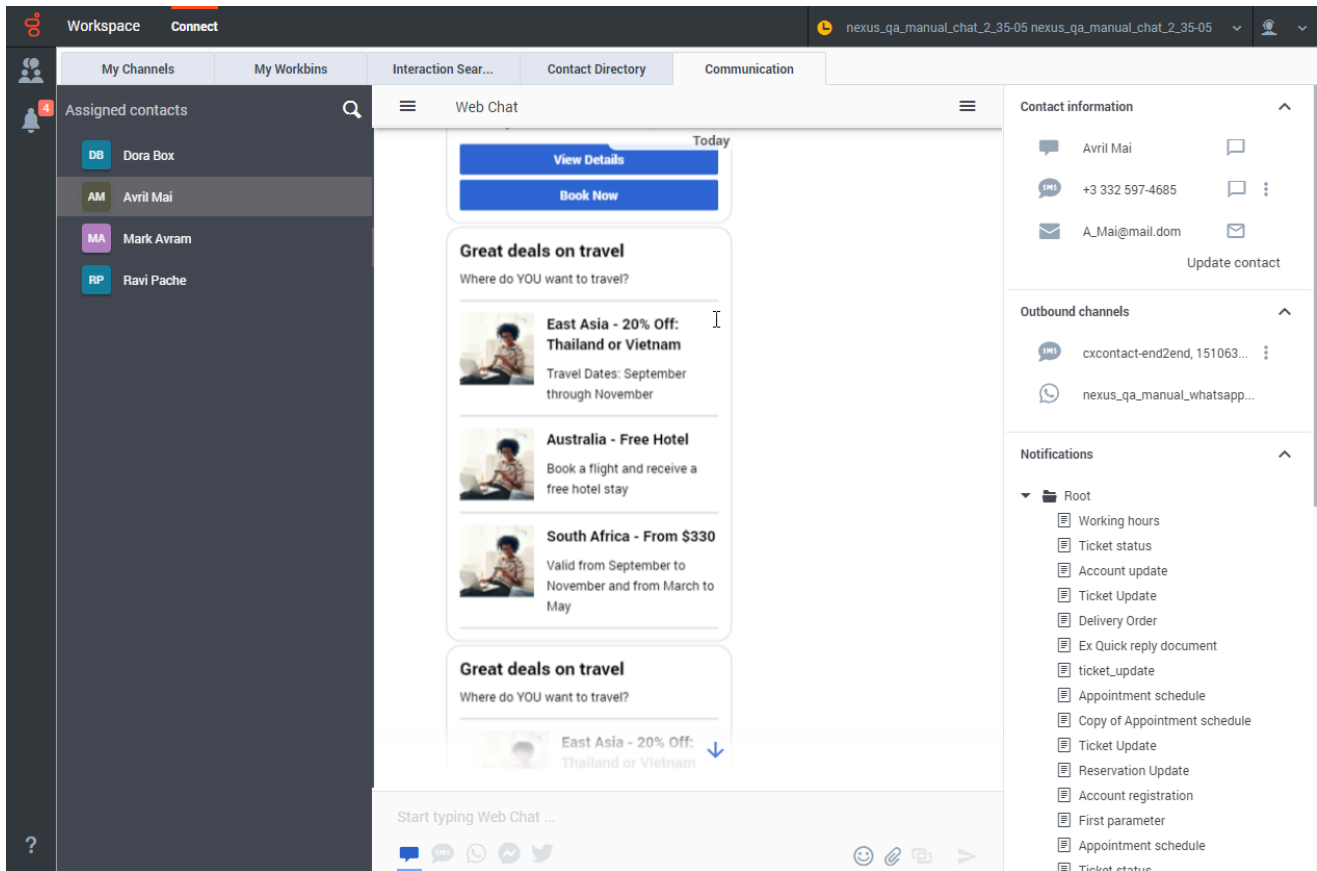
If the contact is found in your organization's contact database, they can be added to your **Assigned contacts** list after interacting with the contact, and the contact record is displayed in the **Communication** tab. You can select any of the available channels to send a new message.

Outbound channels

The **Outbound channels** area enables you to choose different channels to use when starting outbound interactions. If more than one channel is available for you, click the Channel Select (⋮) button next to the channel name to select a different channel.



Web Chat structured messages (Notifications)



What are structured messages?

Some organizations use Genesys Web Chat to enable their contacts to interact with a chatbot prior to connecting the chat interaction to a live agent. Chatbots can deliver both regular text and structured messages to contacts.

Structured messages are a way for your organization to send standardized content to contacts. For example, a structured message might be a selection of buttons that a contact can click to indicate a choice. Structured messages can also include images, text, and video to enrich the content delivered by the bot.

Structured messages include the following message types:

- Quick replies
- Single and multi-select lists
- Carousels

Handling web chat interactions with structured messages

When you handle a web chat containing structured messages in either the Chat interaction view (for an active chat) or the **Communication** tab (for an asynchronous chat), Agent Workspace displays

the structured messages for you.

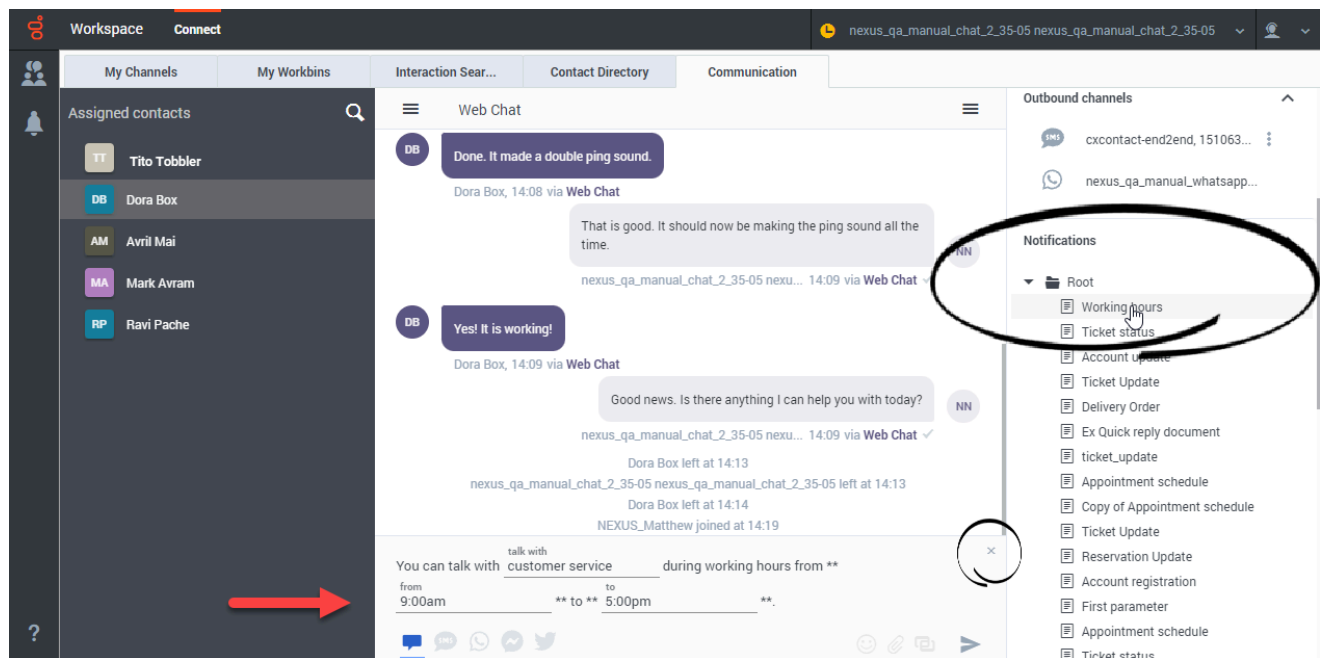
Note: You cannot interact with the choice buttons of structured messages containing buttons and list selections.

Workspace displays the following for you:

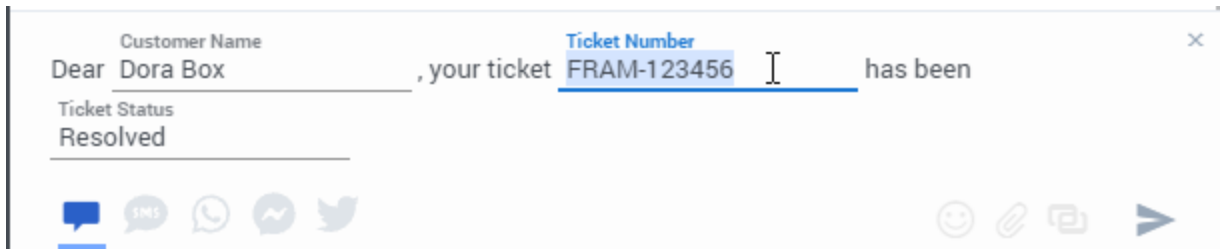
- All buttons, videos, images, and lists in the same format that was presented to the contact.
- Single-and multi-select vertical lists, including any images and text associated with the list.
- Carousels and all of their associated elements, including the look-left and look-right buttons.
- Quick Replies and associated buttons.
- A text message describing the *action* taken by the contact (usually the selection they made).

Notifications area

The **Notifications** area in the **Communications** tab contains a list of structured messages that you can send to a contact.



To select a message, click it. It is inserted into the **Start typing Web Chat** field. Click **Send** (➤) to send the notification. You might be able to type in some notifications to add information such as a contact's name, a date, or a ticket number.

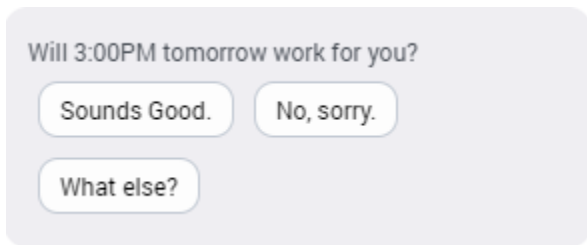


Click the "X" to remove the Notification from the **Start typing Web Chat** field.

Sample structured messages

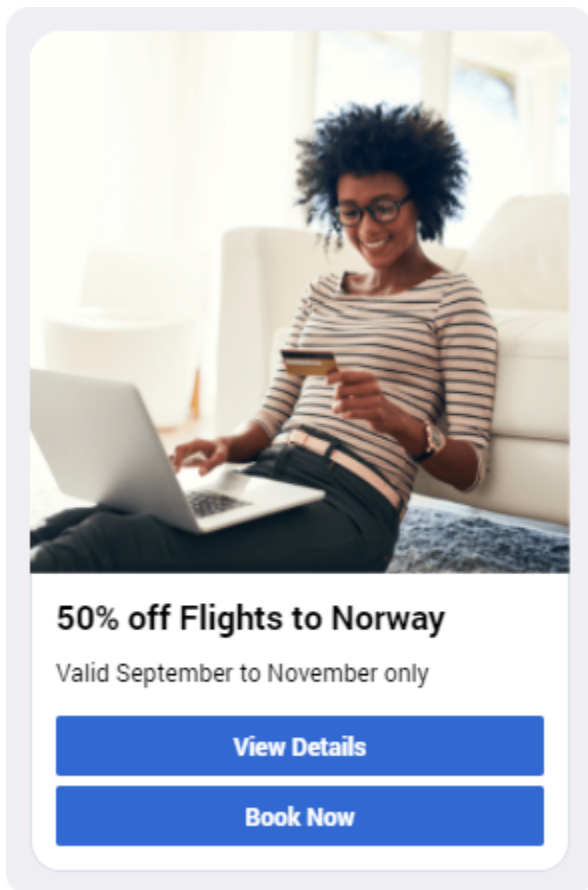
The following are examples of structured messages that an organization might send to contacts who are engaged in a web chat with a bot.

Quick Reply



The Quick Reply structured message usually contains a question from the chatbot to the contact. The contact can click a button to choose an answer. In the chat transcript, the Quick Reply is displayed along with the answer selected by the contact.

Generic structured messages: image or video, text, and buttons




A generic structured message contains any combination of an image or video, some text, and buttons that the contact can click. In the chat transcript, the generic structured message is displayed along with the action taken by the contact.

Multiple-selection list


Great deals on travel

Where do YOU want to travel?




**East Asia - 20% Off:
Thailand or Vietnam**

Travel Dates: September
through November



Australia - Free Hotel

Book a flight and receive a
free hotel stay



South Africa - From \$330


Valid from September to
November and from March to
May


The multiple-selection list contains a vertical stack of options that might include images and text. The contact clicks one or more of them to indicate a preference. In the chat transcript, the multiple-selection list is displayed along with the list options selected by the contact.


Single selection list

Great deals on travel

Where do YOU want to travel?

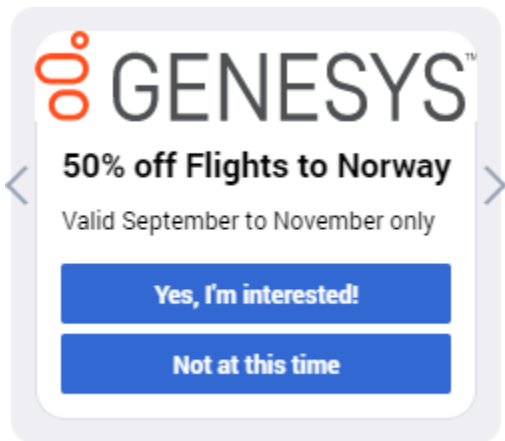
 **East Asia - 20% Off:
Thailand or Vietnam**
Travel Dates: September
through November

 **Australia - Free Hotel**
Book a flight and receive a
free hotel stay

 **South Africa - From
\$330**
Valid from September to
November and from March
to May

The single-selection list contains a vertical stack of options that might include images and text. There is a button next to each list item. The contact clicks one of the items to indicate a preference. In the chat transcript, the single-selection list is displayed along with the selection the contact made.

Carousel



The carousel is a way of displaying multiple generic structured messages to a contact in a single bot message. The contact clicks the look-left and look-right arrows to horizontally scroll through the generic structured messages in the carousel. In the chat transcript, the carousel of generic structured messages is displayed along with the action taken by the contact.

SMS messaging

An SMS interaction is the Agent Workspace interface that lets you handle an SMS message from a contact as a chat.

To start receiving SMS interactions, set your status on the SMS channel to **Ready**.

Tip

In some environments, agent status is set to **Ready** when the agent logs in. This means that SMS interactions are directed to these agents upon login.

When you receive an SMS it is either accepted automatically, or a pop-up notification is displayed on your desktop to enable you to accept the message. When you accept an SMS, the Chat interaction view opens on your Agent Workspace. It includes all the controls, information about the email (Case Information), and **Disposition** and **Note** tabs where you can add information about the SMS. There might also be tabs on the right side of the view that contain contact information, history, and other features.

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**.

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 **Assigned Contacts** panel, search for 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 **Create SMS Interaction** icon in the **Contact information** column to open the Chat interaction view.

Important

You might receive an error message that the number from which you are trying to send a message is incorrect. Contact your administrator.

SMS vs. MMS

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 sends you SMS from a mobile device, a web interface, or an email client. From your perspective, handling an SMS chat session is no different from handling any other Chat session, whether you are handling a one time interaction or are continuing a conversation.

Multimedia Message Service (MMS) is a multimedia component of voice and Internet communication. In Workspace, MMS enables you to receive images sent to your contact center from a mobile device, a web interface, or an email client. Images are displayed to you as thumbnails. To view the image full-size, double-click it or right-click it and select **Open** from the context menu. It opens in the default application specified in the Windows operating system. If you have been granted the correct permissions, you can save an image by clicking the **Save** icon on the image or by right-clicking on it and selecting **Save** from the context menu.

Important

If a contact sends you an MMS that has an attachment issue you will receive a notification. Ask the contact to check the file format of the attachment and resend it.

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 **Assigned Contacts** area of the **Communication** tab and selecting their name from the **Assigned Contacts** list.

To continue the conversation, either type in the **Write a Message** field and click **Send** or click **Create SMS Interaction** 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 use the **SMS** channel, click the **Channel** icon and select the **Chat** channel icon.

When the contact responds, you receive a pop-up notification on your desktop. To respond and continue the conversation, click **Show** in the pop-up notification to open the chat in a new **Chat** interaction view.

Tip

- 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 Workspace detects that it is not possible to send an SMS to the number you choose, you will receive a warning message.
- Sometimes an SMS you send cannot be delivered. A system message is displayed in the transcript area if the SMS was not delivered.

WhatsApp messaging

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 sends you a message from a mobile device or computer. From your point of view, handling a WhatsApp chat session is no different from handling any other Chat session, whether you are handling a one time interaction or are continuing a conversation.

To start receiving WhatsApp interactions, set your status on the WhatsApp channel to **Ready**.

Tip


In some environments, agent status is set to **Ready** when the agent logs in. This means that WhatsApp interactions are directed to these agents upon login.

When you receive a WhatsApp it is either accepted automatically, or a pop-up notification is displayed on your desktop to enable you to accept the message. When you accept a message, the WhatsApp interaction view opens on your Agent Workspace. It includes all the controls, information about the WhatsApp (Case Information), and **Disposition** and **Note** tabs where you can add information about the email. There might also be tabs on the right side of the view that contain contact information, history, and other features.

You handle the interaction by exchanging messages with your contact. If either you or the contact ends the session, the interaction is done. To close the interaction, you must mark it as **Done**.

To reactivate an interaction that is closed and marked as **Done**, perform these steps:

- In the **Connect** group, select the **Communication** tab.
- In the **Assigned Contacts** view, select the contact.

All previous 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 **Create WhatsApp Interaction** () to open the Chat interaction view.

Contacts can send WhatsApp messages from their device to your organization's WhatsApp channel. When WhatsApp messages are routed to you, handle WhatsApp messages just like you would handle a Chat interaction with one of your contacts.

Read the messages from your contact in the Transcript area. Type your messages in the **Start typing Web Chat** field.

The **Contact information** area 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.

Communication tab

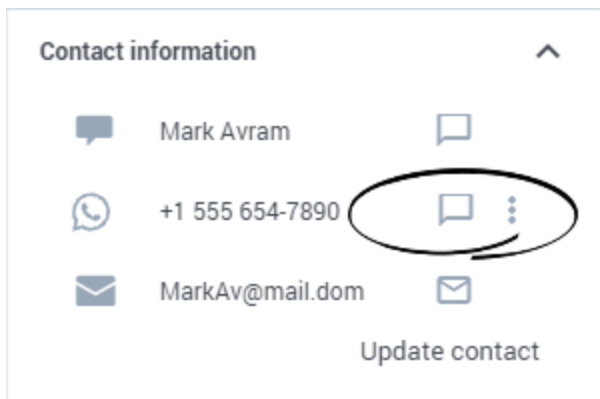
The **Communication** tab in the **Connect** group allows you continue conversations that you or others at your contact center have had with your company's contacts.

To continue the conversation, find the contact in the **Communication** tab, then select their name from the **Assigned Contacts** view.

To continue the conversation, perform one of the following actions:

- Type in the **Start typing Web Chat** field and click **Send**.
- Click the **Create WhatsApp Interaction** icon to open a new Chat interaction view.

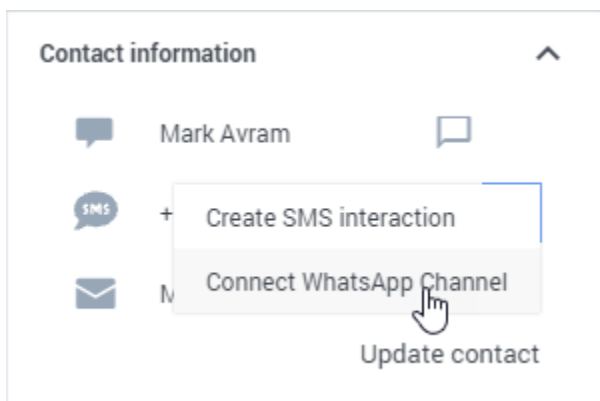
WhatsApp interaction can also be started by clicking the **Create WhatsApp interaction** button next to the WhatsApp channel in the **Communication** tab:



Note: Sometimes a WhatsApp message you send cannot be delivered. A system message is displayed in the transcript area if the WhatsApp message was not delivered.

Connecting to the WhatsApp channel

When you select a contact from the **Assigned Contacts** view in the **Communication** tab, the list of channels and phone numbers available for a contact is displayed in the **Contact Information** area. If you have not interacted with a contact in the past, or if the contact has been removed from your Assigned Contacts list, those contacts are considered unassigned contacts.



If the contact has a WhatsApp account that is not connected to your organization, send a request to WhatsApp to connect the account to your organization by clicking the **Action** menu next to the phone number and selecting **Connect WhatsApp Channel** (refer to the image above). When WhatsApp approves the request by indicating that the number is a valid WhatsApp number, the WhatsApp channel is displayed in the **Contact Information** area.

If the contact does not have a WhatsApp account for a phone number, ask the contact to confirm which number to use. If the number does not exist in the Contact Information in the Contact Directory, you can add the number. To refresh the Contact Information area, unsubscribe from the contact, and search for them again. When the number displays in the Contact Information area, select **Connect WhatsApp Channel** from the channel action menu next to the correct phone number.

After you have added the WhatsApp channel to the contact, the channel action menu contains two options:

- **Create WhatsApp Interaction:** Create and send a new WhatsApp interaction to the contact.
- **Validate WhatsApp Channel:** If you get an error trying to send a WhatsApp message, validate that the WhatsApp channel is still available for the contact. If there is an error, a warning icon is displayed next to the channel in the **Contact Information** area.

Important

WhatsApp does not permit you to send regular WhatsApp messages to a contact immediately after the WhatsApp channel is added. You are only permitted to send Notifications to a contact until the contact replies.

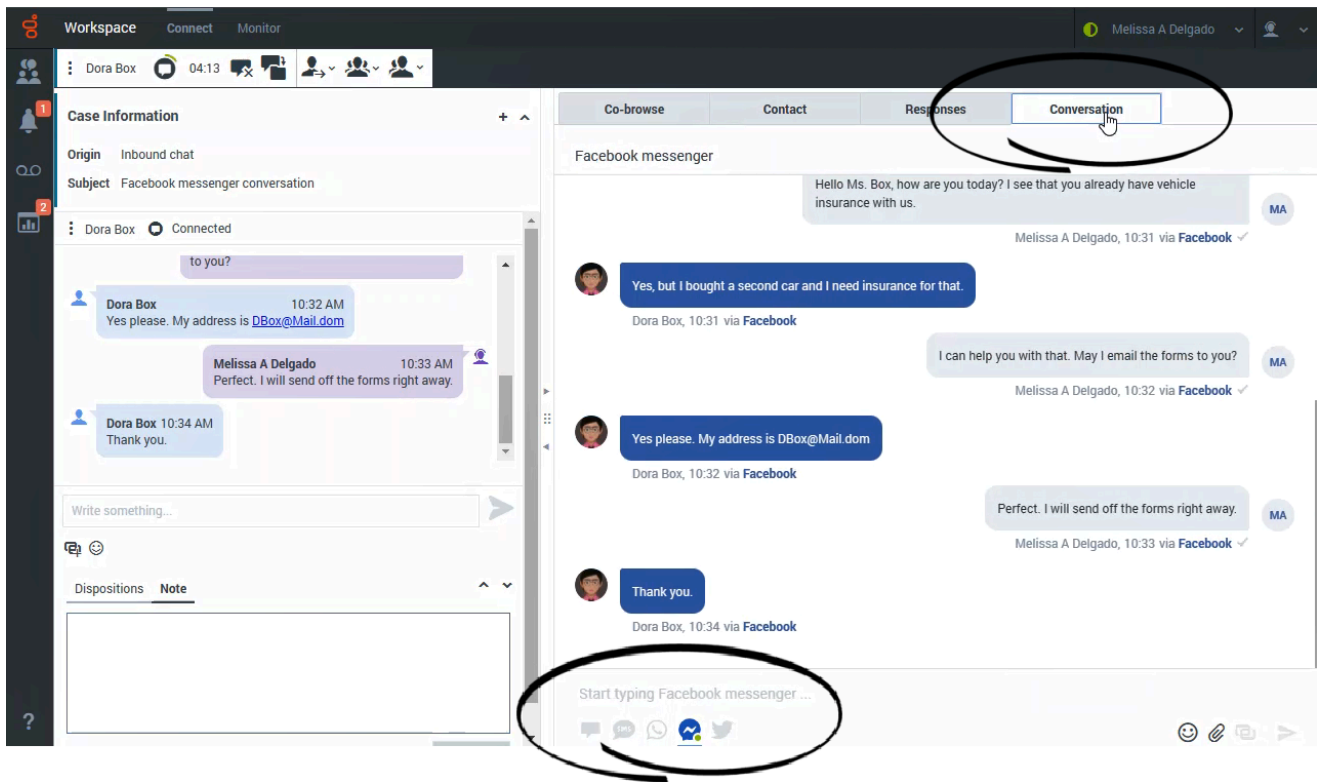
Messenger

To receive Facebook Messenger chat interactions, set your status on the Chat channel to **Ready**.

Tip

In some environments, agent status is set to **Ready** when the agent logs in. This means that Facebook interactions are directed to these agents upon login.

When a contact clicks **Send Message** on your organization's Facebook page, they can use Facebook Messenger to send a message to your organization. Instead of having to use Facebook Messenger yourself to reply, the message is directed to you as an asynchronous Chat interaction in Agent Workspace. You handle it just like you would any other direct 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 Facebook actor name and ID. You can update the contact information and view the history of interactions with the contact.

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 organization'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 **Start typing Web Chat** 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.

When the contact responds, you receive a notification on your desktop. To open the **Communication** tab of the **Connect** group, click **Show**. To open the chat in a new Chat interaction view if you must respond and continue the conversation, click the **Chat** icon.

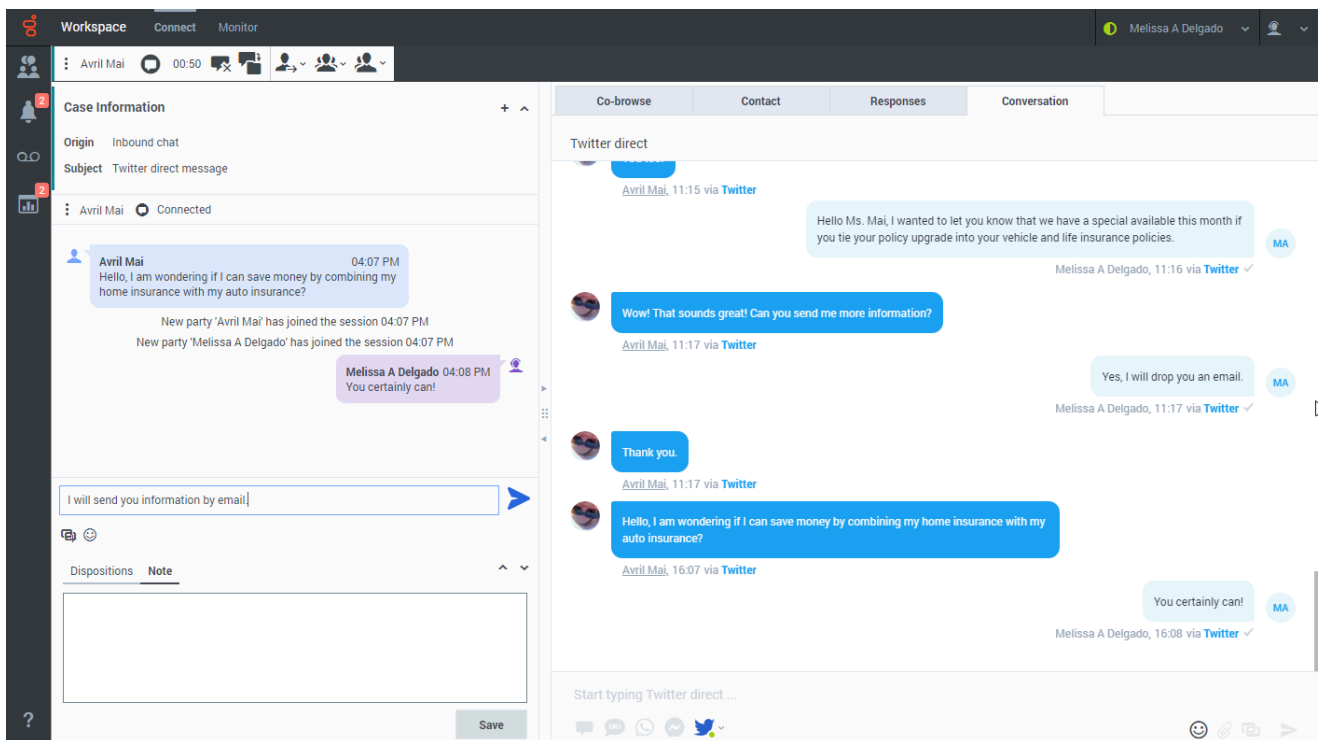
Twitter Direct Message

To receive Twitter Direct Messages, set your status on the Chat channel to **Ready**.

Tip

In some environments, agent status is set to **Ready** when the agent logs in. This means that Twitter interactions are directed to these agents upon login.

Customers of your organization who are followers of your organization's Twitter page can send Twitter Direct Messages to your organization's Twitter handle (for example, **@Genesys**). Instead of having to use Twitter Direct Message yourself to reply, the message is directed to you as an asynchronous Chat interaction. Click **Accept** on the Interaction Notification and a new Chat interaction opens in Workspace.



The screenshot displays the Genesys Workspace interface. On the left, the 'Case Information' panel shows the chat origin as 'Inbound chat' and the subject as 'Twitter direct message'. The chat history shows a customer message from 'Avril Mai' at 04:07 PM asking about saving money by combining home and auto insurance. An agent, 'Melissa A Delgado', responds at 04:08 PM saying 'You certainly can!'. The main 'Conversation' pane shows a 'Twitter direct' message from 'Avril Mai' at 11:15 via Twitter. The agent's response at 11:16 via Twitter explains a special offer for policy upgrades. The customer replies at 11:17 via Twitter asking for more information. The agent responds at 11:17 via Twitter saying 'Yes, I will drop you an email.'. The customer says 'Thank you.' at 11:17 via Twitter. The agent responds at 16:07 via Twitter saying 'Hello, I am wondering if I can save money by combining my home insurance with my auto insurance?'. The agent's final response at 16:08 via Twitter says 'You certainly can!'. The bottom of the interface shows a 'Start typing Twitter direct ...' field and a 'Save' button.

Read the messages from your contact in the Transcript area. Type your messages in the **Start typing Web Chat** 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.

Tip

If either 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 organization's contacts.

After an agent or the contact leaves a chat session, you can continue the conversation by using **Search contacts** to find the contact in the **Assigned contacts** list then selecting their name.

To continue the conversation, either type in the **Start typing Web Chat** field and click **Send** or click the **Twitter direct** icon to open a new Chat interaction view.

Important

In some environments, the **Start typing Web Chat** field is not available. To start a new interaction with the contact click the **Chat** icon and select a channel icon, such as Chat, Email, SMS, WhatsApp, Facebook, or Twitter.

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. To open the **Communication** tab of the **Connect** group, click **Show**. To open the chat in a new Chat interaction view if you must respond and continue the conversation, click the **Twitter direct** icon.

Communication tab.

Public Social Engagement

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, comments, and replies on your organization's Facebook page are monitored and automatically routed to agents across your organization who are using Agent Workspace. Routing ensures that the right person handles the contact's message, whether it is an inquiry about a new business opportunity or a negative comment that should be handled immediately.

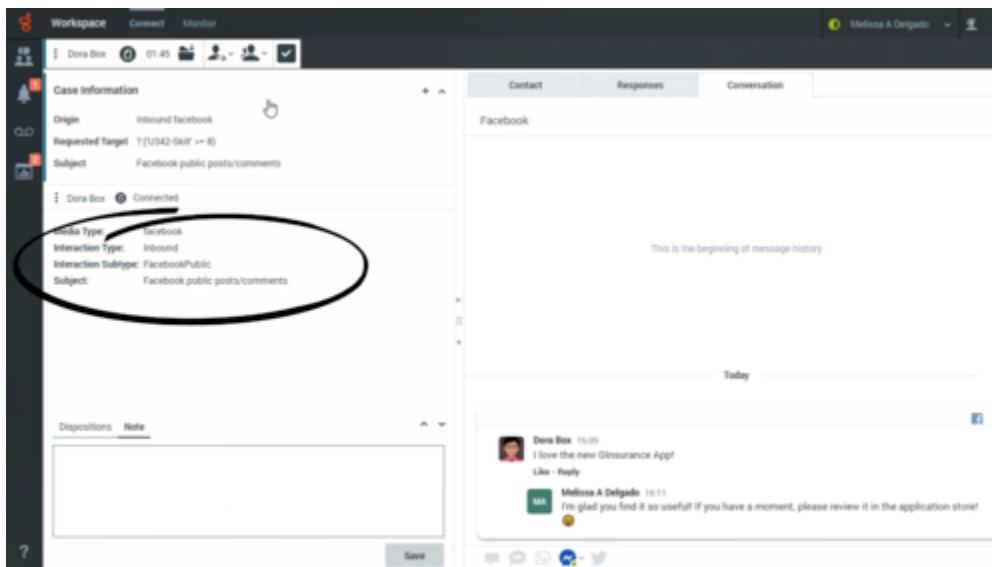
Handling contacts using Agent Workspace's Facebook channel improves Customer Experience (CX) by providing consistent CX across all channels. Genesys Social Engagement identifies the contact and matches them against known individuals already in the contact database. When a Facebook

message, comment, or reply is directed to you, you have access to all previous interactions with the contact.

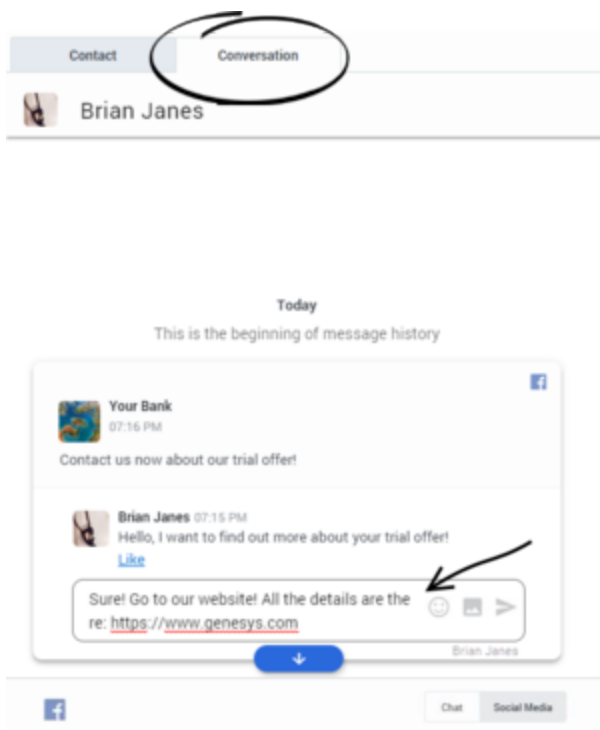
Facebook Public

When a contact replies to a post or creates a post on your organization'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. Your reply is posted on your organization's public Facebook page as a reply to the post from the contact. Remember, your post will be seen by anyone who visits your organization'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. To reply to your contact, 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.

The **Communication** and **Conversation** tabs allow the following actions:

- Click **Emoji** (😊) to send an emoji to your contact.
- Click **Attach** (📎) to attach an image.
- Click **Send** (➤) to send messages you type in the Message Composition area.
- Click **Chat** (Chat) to filter messages to show Private type only.
- Click **Social Media** (Social Media) to filter messages to show Public type only.
- Click **Contacts** (☰) to toggle the display of the **Contacts information** area.

Social Engagement with Twitter

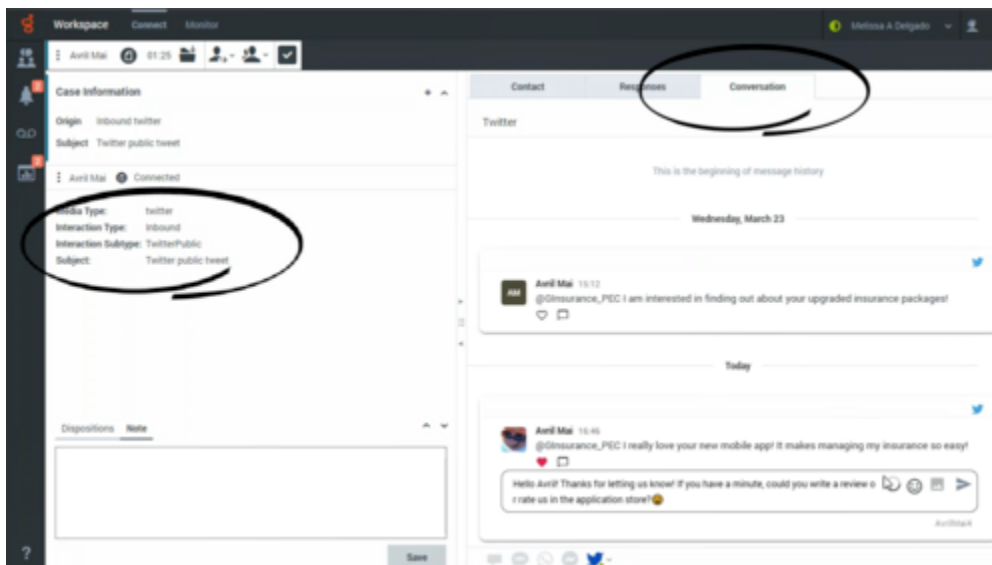
You are not restricted to private Twitter Direct messages. You can also engage with customers by responding to public Tweets and replies from your organization's Twitter page.

You can monitor your business Twitter presence and identify and respond to online comments by using Genesys Social Engagement. Twitter Direct Messages and Tweets and replies on your organization's Twitter page are monitored and automatically routed to agents across your organization who are using Agent Workspace. Routing ensures that the right person handles the contact's message, whether it is an inquiry about a new business opportunity or a negative comment that should be handled immediately.

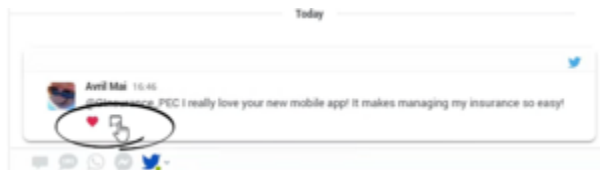
Handling contacts using Agent Workspace's Twitter channel improves Customer Experience (CX) by providing consistent CX across all channels. Genesys Social Engagement identifies the contact and matches them against known individuals already in the contact database. When a Direct Message, Tweet, or reply is directed to you, you have access to all previous interactions with the contact.

Twitter Public

When a contact replies to a Tweet or creates a Tweet on your organization'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.



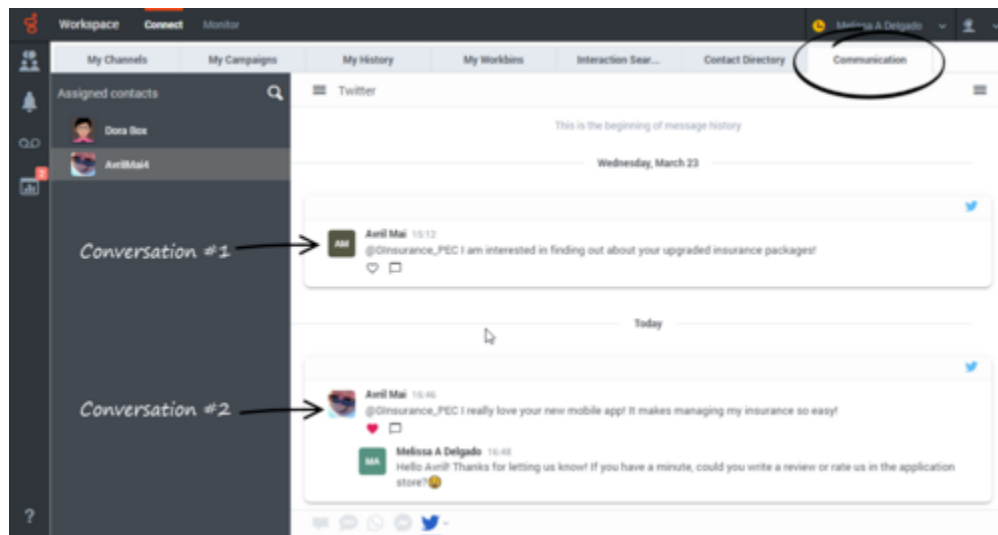
To respond to the Tweet click **Reply**. You can also click **Like**. Type your reply in the message field then click **Send**. In the **Conversation** tab, your response appears indented below the Tweet from the contact. Your reply is posted on your organization's public Twitter page as a reply to the Tweet from the contact. Remember, your post will be seen by anyone who visits your organization'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.

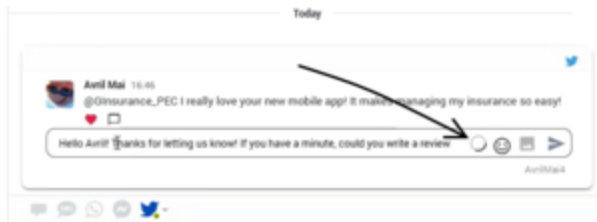
In the **Communication** tab, select a contact and then click **SOCIAL MEDIA** to access all the public Twitter interactions your organization has had with the contact. Because social media is non-linear, you can scroll through the transcript and like and respond to any of the Tweets and replies. Think of each Tweet and reply sequence as a separate conversation.



The conversation area allows the following actions:

- Click **Emoji** (😊) to send an emoji to your contact.
- Click **Attach** (📎) to attach an image.
- Click **Send** (➤) to send messages you type in the Message Composition area.
- Click **Chat** (Chat) to filter messages to show Private type only.
- Click **Social Media** (Social Media) to filter messages to show Public type only.
- Click **Contacts** (☰) to toggle the display of the **Contacts information** area.

As you type your reply in the **Reply** field, the small gray circle on the right begins to turn dark blue. 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?

- Contacts
- Team Communicator
- Predictive Engagement customer journey
- Internal interactions

Top 5 topics

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