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Agent Workspace Agent's Guide

[SMS Chat](#)

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The Agent Workspace Chat channel enables you to exchange chat messages with a contact. This is called a chat interaction. Chat interactions include Web Chat, SMS and MMS messages, Facebook Messenger, and Twitter Direct Messages.

Related documentation:

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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.
- Some Agent Workspace features are available only for Genesys Multicloud CX users.

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 answered 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**. However, sometimes you are required to continue a chat conversation. Perhaps you had to take time to find additional information for the contact or initiate a business process in your company before continuing the conversation.

If your account is enabled for asynchronous chat, you can continue a chat interaction after the initial interaction is ended by using the Conversation tab in the interaction window or the Communication tab.

If you have not yet marked a closed interaction as **Done**, in the **Conversation** tab, the transcript of your current interaction as well as all previous chat interactions with the contact is displayed. You can scroll through it or use the Search feature to find messages containing keywords. To reactivate the chat session, type your message in the Message field and click **Send**.

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.

SMS Interactions

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

Important

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

Multimedia Message Service (MMS) is a multi-media 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 will open 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.

When a contact sends an SMS or MMS from their device to your company's SMS channel it is directed to you as a Chat and you handle it just like you would any other chat message with one of your contacts.

The screenshot shows the Agent Workspace interface. At the top, there are tabs for 'Workspace', 'Connect', and 'Monitor'. The 'Connect' tab is active, showing a phone number '15555555555' and a timestamp '04:08'. Below the tabs, there are icons for users, a bell, and a graph. The main area is titled 'Case Information' and shows 'Origin: Inbound chat' and 'Subject: Agent initiated SMS'. A transcript section shows a message from 'Melissa A Delgado' at 02:43 PM: 'Hello Ms. Mai, have you heard about our new offer?'. The agent responded at 02:44 PM: '15555555555 02:44 PM No! Please tell me more!'. Below the transcript is a message input field with placeholder text 'Write something...' and a send button. At the bottom, there are tabs for 'Dispositions' and 'Note', with 'Note' being the active tab. To the right, a sidebar titled 'Co-browse' is open, showing tabs for 'Information' (which is selected) and 'History'. The 'Information' tab displays a list of fields: Title, *First Name, *Last Name, Workshop PIN, Facebook Actor Name, Facebook Actor ID, Twitter User Address, Twitter User Id, WhatsApp Actor Name, WhatsApp User Id, and Customer Segment. Each field has a small input box next to it.

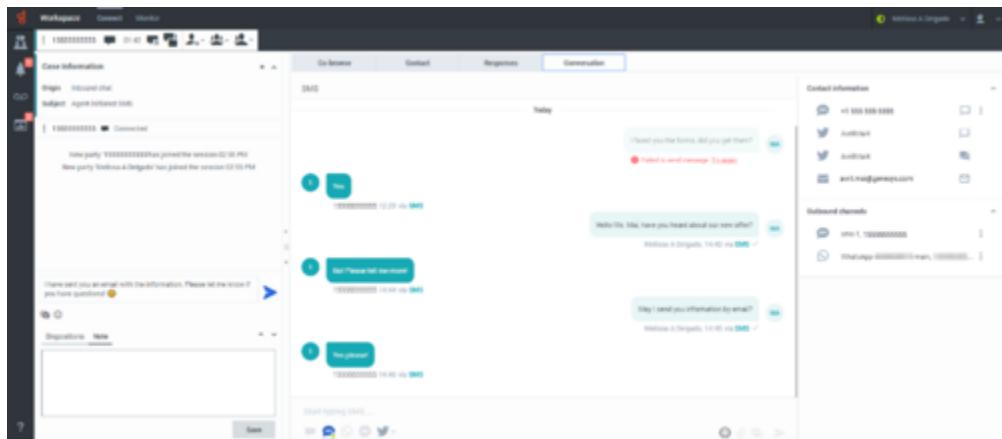
Read the messages from your contact in the Transcript area. Type your messages in the Message Composition field ("Write something...").

The **Contact** tab contains information about the contact including the phone number that sent the SMS. You can update the contact information and review the history of interactions with the contact.

If you have had previous chat/SMS interactions with the contact, the full transcript is in the Conversation tab.

Conversation tab

The **Conversation** tab is displayed in the right panel of the Chat Interaction view.

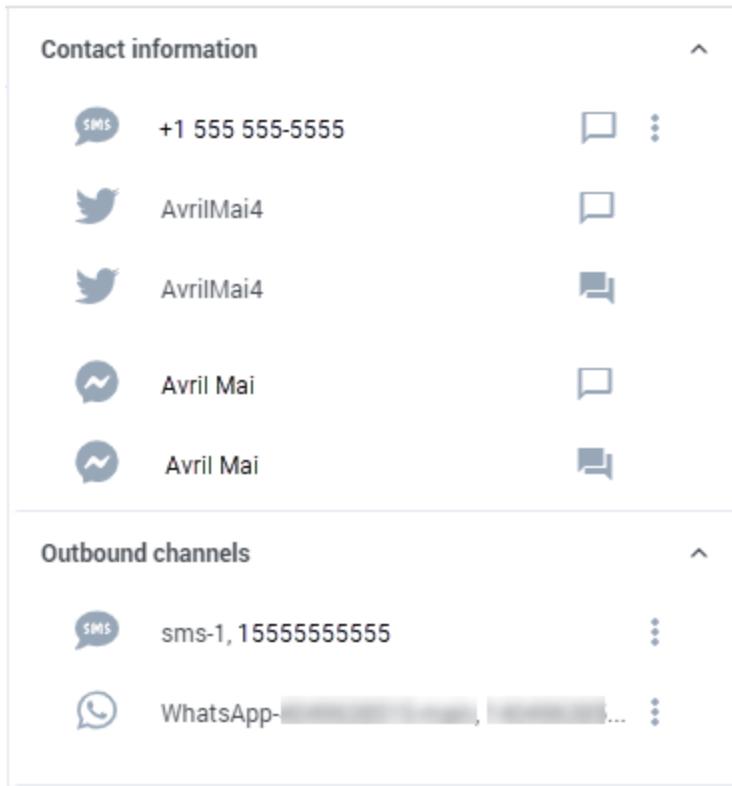


The transcript of the chat is displayed both in the Transcript area and the **Conversation** tab. The **Conversation** tab also contains the transcripts of all previous chat interactions that your contact center has had with the contact.

The **Conversation** tab allows the following actions:

- Click **Emoji** (- Click **Send** (➡) to send messages you type in the Message Composition area.

To start an outbound SMS interaction, click the **Create SMS Interaction** icon in the **Contact information** area. This displays the Chat Interaction window and enables you to continue the conversation there with access to all the interaction window features such as Contact Information, Contact History, and Standard Responses. **Note:** Genesys recommends that you switch to a chat interaction window whenever you want your chatting time to be recorded for KPI purposes.



The screenshot shows the 'Contact information' and 'Outbound channels' sections of the Agent Workspace. The 'Contact information' section lists five entries: '+1 555 555-5555' (SMS), 'AvrilMai4' (Twitter), 'AvrilMai4' (Twitter), 'Avril Mai' (Facebook), and 'Avril Mai' (Facebook). Each entry has a message icon and a three-dot menu icon. The 'Outbound channels' section lists two entries: 'sms-1, 155555555555' (SMS) and 'WhatsApp- [redacted], [redacted] ...' (WhatsApp). Each entry has a message icon and a three-dot menu icon.

Contact Information	Action
+1 555 555-5555	⋮
AvrilMai4	⋮
AvrilMai4	⋮
Avril Mai	⋮
Avril Mai	⋮

Outbound Channels	Action
sms-1, 155555555555	⋮
WhatsApp- [redacted], [redacted] ...	⋮

Tip

If 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 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

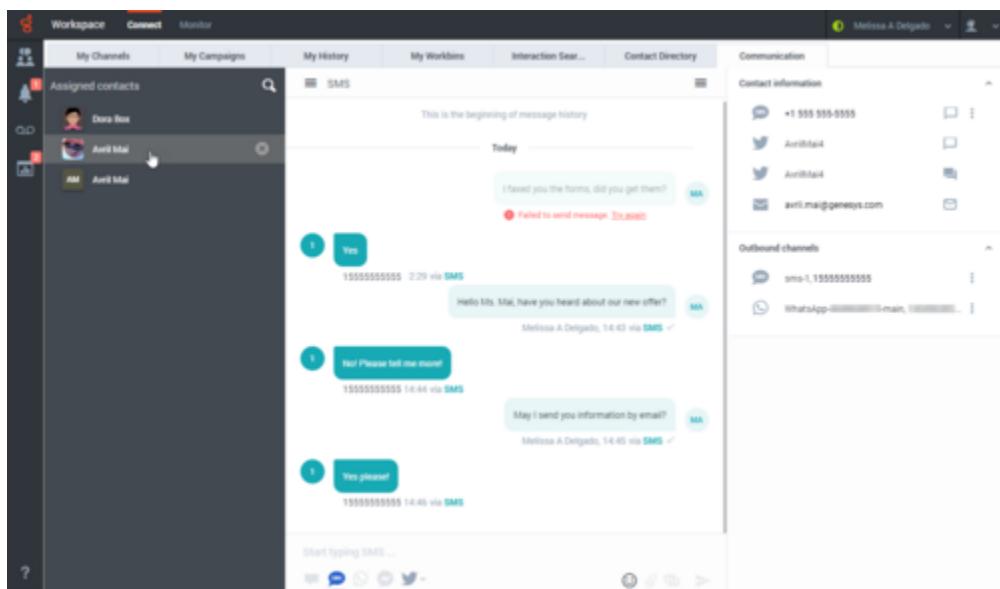
In some environments, the **Write a Message** field is not available. To use the **SMS** channel, click the **Channel** icon and select the **Chat** channel icon.



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.

The **Communication** tab has two areas, the **Assigned Contacts** list and the conversation transcript area.

- Select a contact in the **Assigned Contacts** list to access the conversations that contact has had with your company. 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 there is an unread message from one of your contacts, a number is displayed next to their name indicating the number of unread messages.
- The conversation transcript area displays all the chat interactions that the selected contact has had with your company.



The conversation area allows the following actions:

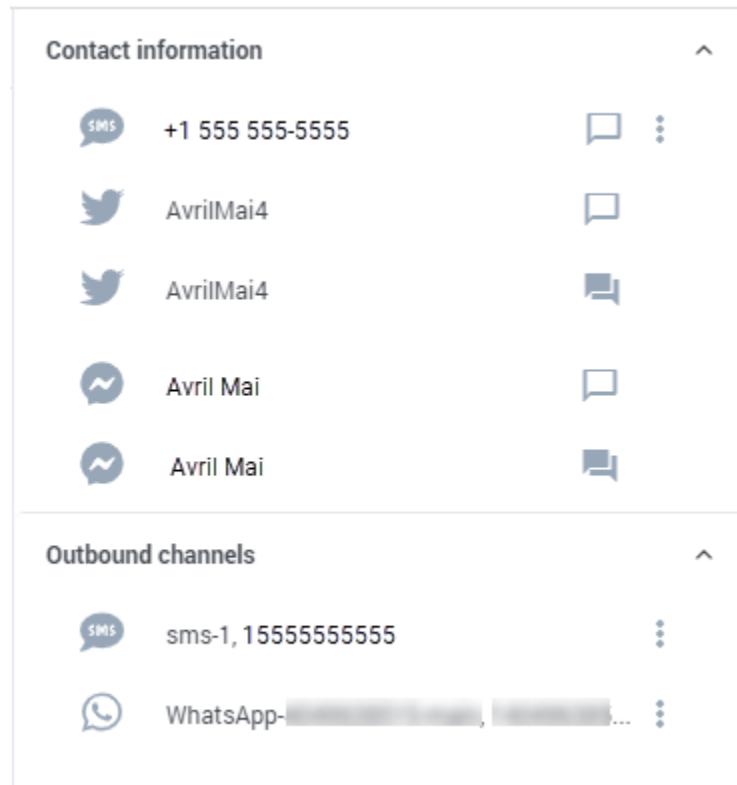
- Click **Send** (➤) to send messages you type in the Message Composition area.

- Click **Emoji** (😊) to send an emoji to your contact.
- Click **Contacts** (☰) to toggle the display of the **Contacts information** area.

To start an outbound SMS interaction, click the **Create SMS Interaction** icon in the **Contact information** area. This displays the Chat Interaction window and enables you to continue the conversation there with access to all the interaction window features such as Contact Information, Contact History, and Standard Responses.

Notes:

- 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.



The screenshot shows the Agent Workspace interface with two main sections: 'Contact information' and 'Outbound channels'.

Contact information section:

Icon	Contact Name	Action Buttons
SMS	+1 555 555-5555	Chat icon, More options icon
Twitter	AvrilMai4	Chat icon
Twitter	AvrilMai4	Video icon
Chat	Avril Mai	Chat icon
Chat	Avril Mai	Video icon

Outbound channels section:

Icon	Channel Name	Action Buttons
SMS	sms-1, 155555555555	More options icon
WhatsApp	WhatsApp-[redacted]	More options icon

Refer to Chat for information about using the Communication tab.

What next?

- Chat
- Contacts
- Team Communicator
- Internal interactions

Top 5 topics

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