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Agent Workspace Agent's Guide

Voice Calls

10/10/2026

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- Agent
- Supervisor

The controls and features that let you handle voice interactions with contacts or team members.

Related documentation:

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Important

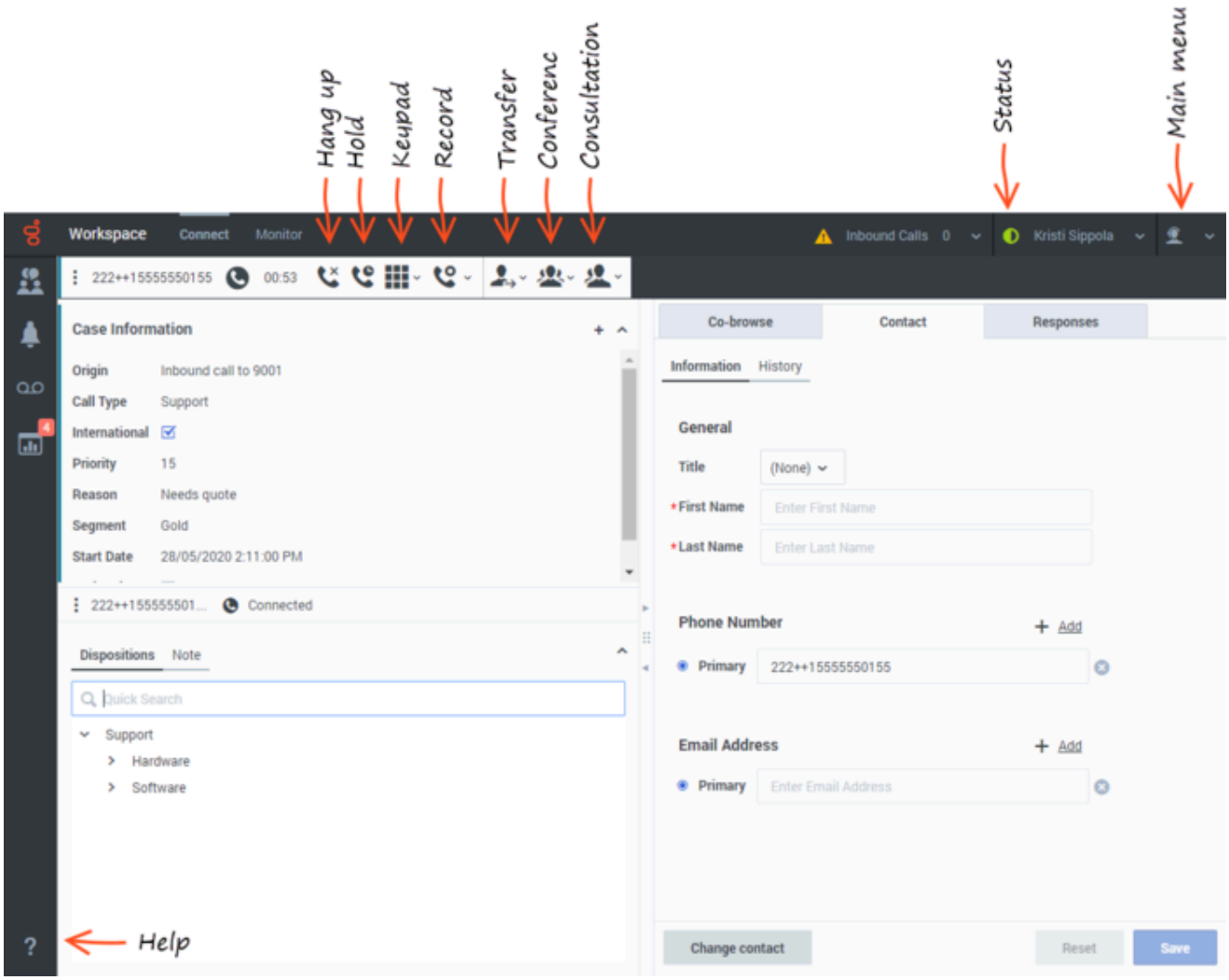
- Due to continual changes to Agent Workspace, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you can access in the product when you use it.
- Some Agent Workspace features are available only for Genesys Multicloud CX users.
- Some Agent Workspace features are available only for Genesys Engage on-premises users.

Tip

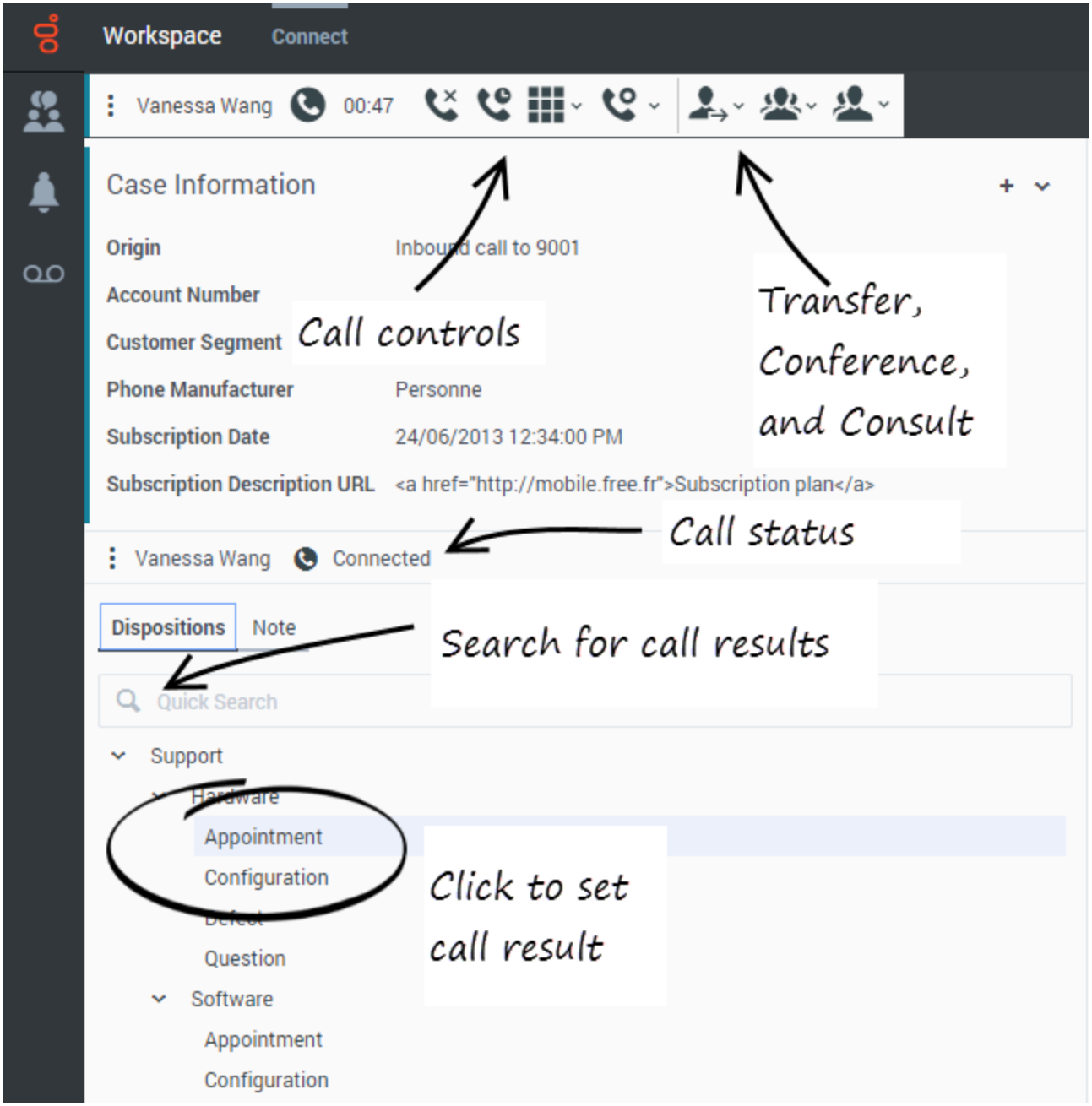
If you are having trouble hearing audio through your headset, refer to the FAQ for possible solutions.

The Voice Interaction Window enables you to handle a voice interaction with an internal target. You can communicate with other agents or internal targets from two places:

- The Team Communicator toolbar in the Main Window view
- The Voice Interaction view (while you are handling an active call with a Contact)



How do I handle an incoming call?



What is a voice interaction?

A voice interaction is the Agent Workspace interface that lets you handle a voice call.

To start receiving calls, set your status on the Voice channel to **Ready**.

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

When you receive a call it is either answered automatically, or a pop-up notification is displayed on your desktop to enable you to accept the call. When you accept a call, the voice interaction view opens on your Agent Workspace. It includes all the call controls, information about the call (Case Information), and Disposition and Note tabs where you can add information about the call. There might also be tabs on the right side of the view that contain contact information, history, and other features. Use the **Contact** tab to review the contact information, such as name, phone number, and email address.

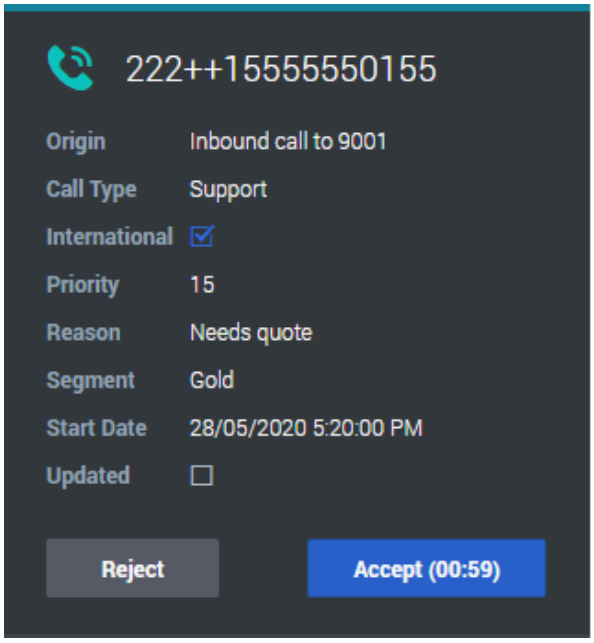
What can I do with a voice interaction?

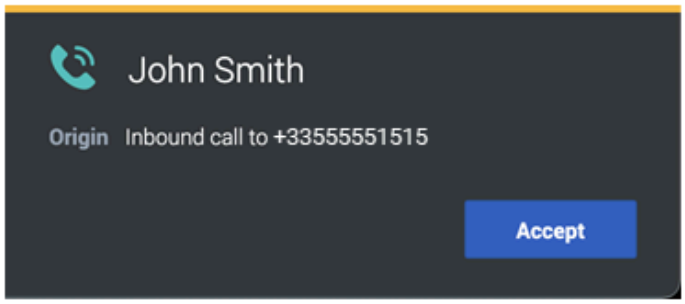
- Handle it myself
- Handle it myself with help
- Instantly transfer it ( )
- Transfer it after a consultation call. If you want to perform a warm transfer or a two-step transfer, click **Consult** to talk to the consultation target and then click **Transfer** ( ) to transfer the call.
- End the call ( )

> **Tip**
> Your organization might use Microsoft Teams or other third-party service to provide support. You might be able to transfer calls, consult with back office team members, or add a back office team member into your call using one of these services.

How do I know when I have a call?

When you get a call, a pop-up notification is displayed on your desktop. You might also hear a ringing tone. The Interaction Notification view displays Case Data. Case Data can help you decide whether you **Accept** or **Reject** the call.





Important

- Your account might be set up for auto-answer. In that case, calls are accepted for you automatically.
- In some environments, the **Reject** option is not available.

In some environments, before the call is connected and your contact hears your phone ringing you receive a call preview. The preview has the same appearance as the Interaction Notification view. The call preview lets you decide whether to connect to the call or put the call back into the queue. If a contact directly dials you, call preview is by-passed. The normal Interaction Notification is displayed for directly dialed calls, even if you are not in the Ready state.

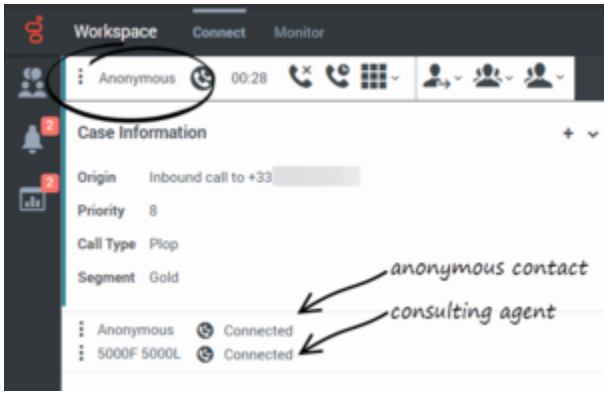
What if the caller is Anonymous?

In some contact centers, inbound calls are anonymous. In this case, there is no information to identify the contact in the interaction view or in the **Contact** tab.

If an anonymous caller provides you with Personally Identifiable Information (PII) and it is your corporate policy to add the PII to the **Contact** tab, then the caller is no longer anonymous and Agent Workspace searches for the contact in the contact database. To assign the interaction to the contact, enter the PII into the contact search field, select the contact from the search results, then click **Assign**.

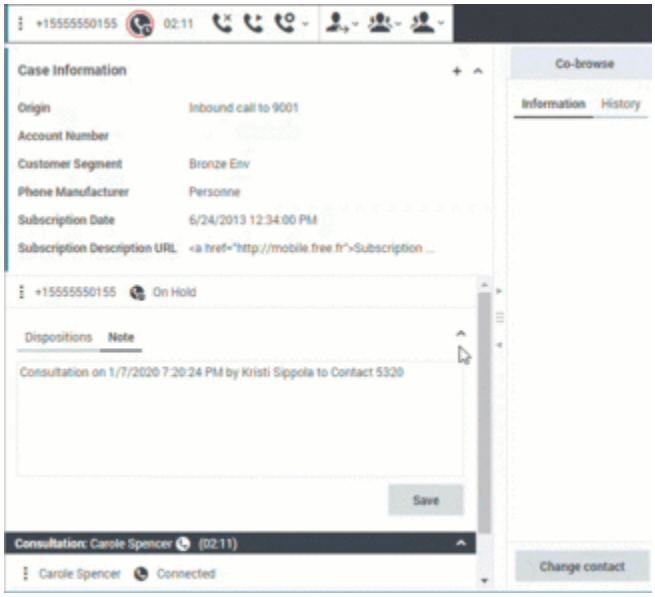
If no matching contact is found, click **Add Contact** ( ) to create a new contact. Add the contact information and click **Save**.

If you transfer, conference, or consult the call, it remains anonymous to the other party. The call also remains anonymous to Supervisors monitoring the call.



How do I expand or collapse panes to avoid scrolling?

To give yourself more room to work or to focus on a single pane, use the little chevrons (up/down arrows) to expand or collapse different parts of the interaction view:



Videos about handling calls

Here are some quick videos showing some of the things you can do while handling a call:

Overview of handling a voice call

Link to video

How to transfer a call

Link to video

How to transfer a call to an agent group

Link to video

How to make a consultation call

Link to video

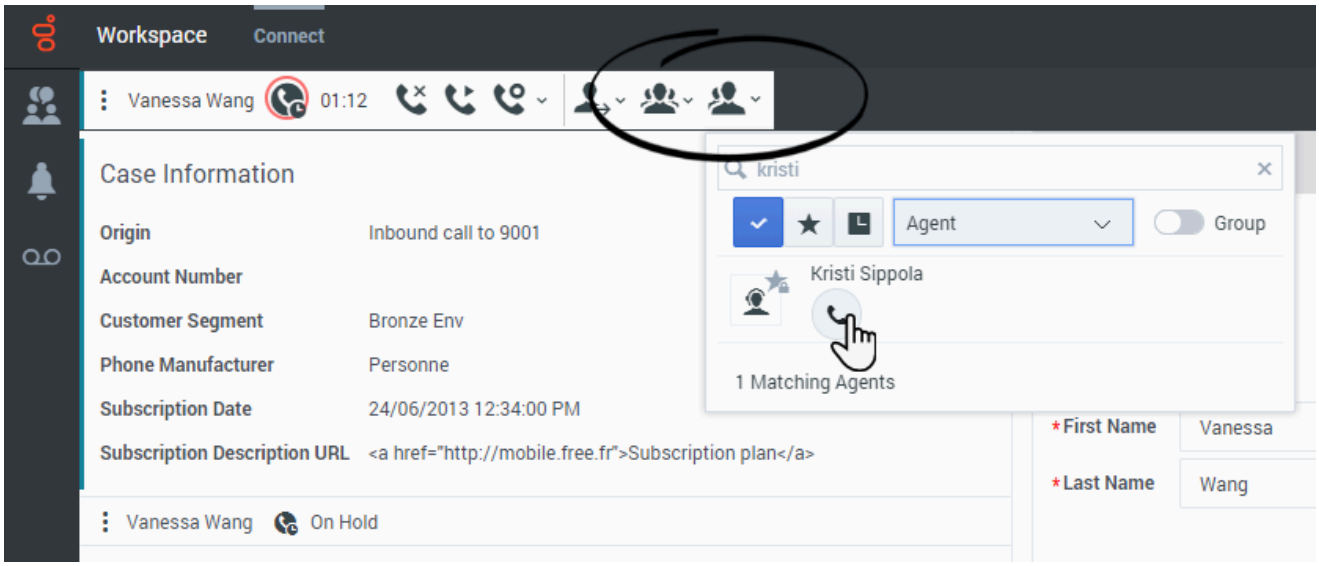
How to use Team Communicator

Link to video

How to dial a new call

Link to video

Where can I get help to handle a call?



- To start a consultation click
- To start a conference click

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.

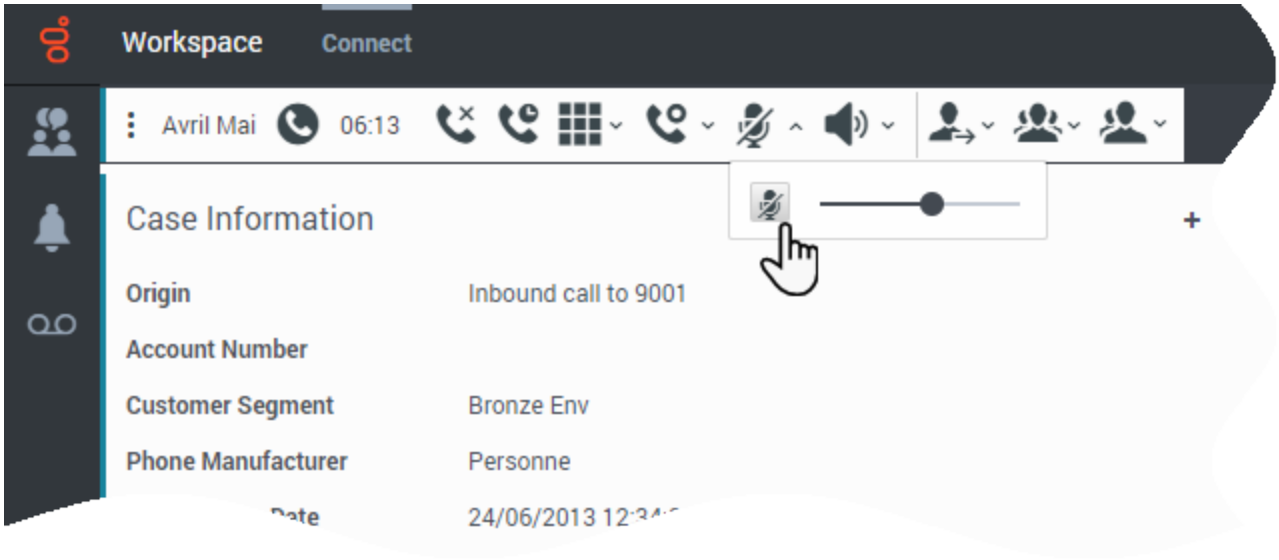
> **Tip**
> Your organization might use Microsoft Teams or other third-party service to provide support. You might be able to transfer calls, consult with back office team members, or add a back office team member into your call using one of these services.

What other actions can I take during a call?

You can:

- Record the call
- Hold the call by clicking and resume the call by clicking
- Dial digits using the keypad (without using your phone. For instance, you can use this keypad dialer when you are navigating a phone system to send dial tones (DTMF).
- View and modify contact information in the **Contact** tab.
- View the contact's interaction history in the **Contact** tab.
- 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.

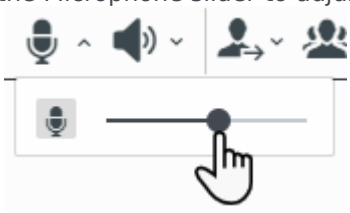
How do I control the volume of my headset and mute myself?

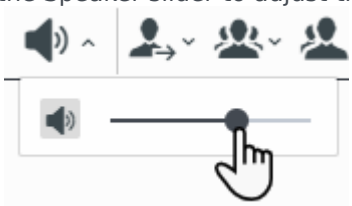


If you use Genesys Softphone, your administrator can set up the controls for your microphone and speakers on your headset. The controls let you mute and unmute yourself or your contact, and let you control the volume of your microphone and speakers.

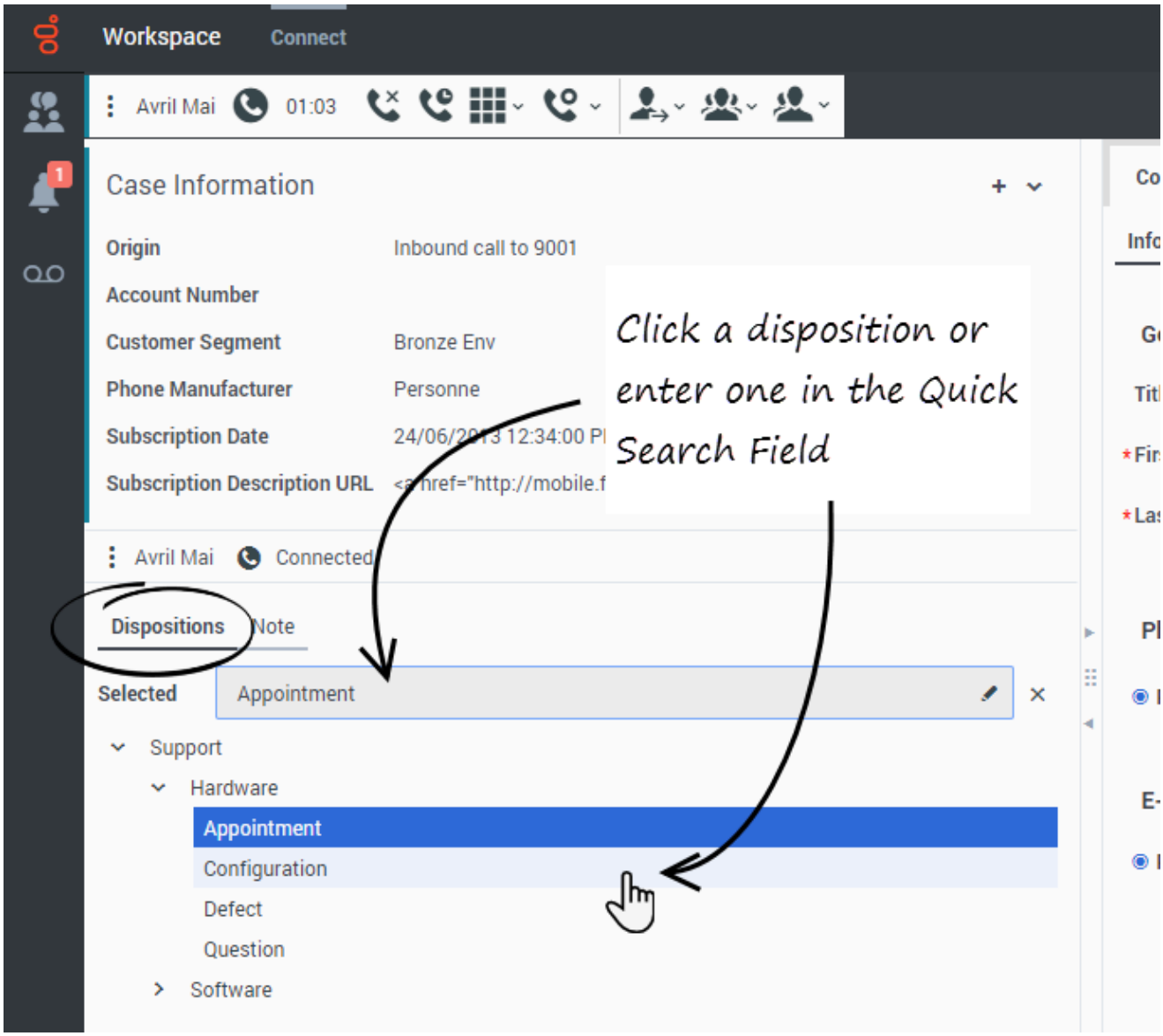
Depending on how your environment is set up, you might encounter different configurations of buttons:

- To Mute/unmute your microphone click:

- Use the Microphone slider to adjust the volume of your microphone:
  
- To Mute/unmute your speaker click:

- Use the Speaker slider to adjust the volume of your speaker:
  

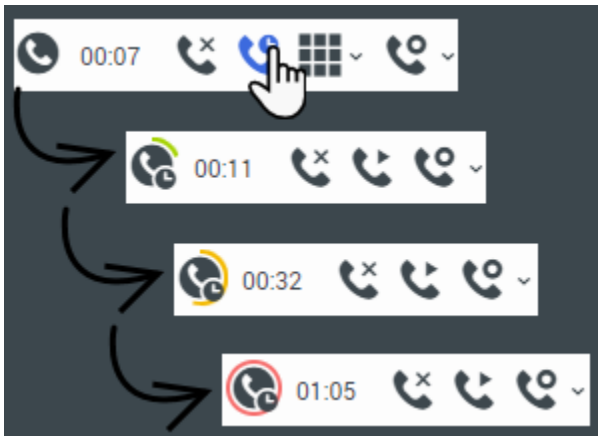
What do I do at the end of a call?



When your call is finished you can perform the following actions:

- Click **End Call** ( ) to hang up.
- Select a disposition code if required
- Mark Done by clicking **Done** ( )
- Change status as needed

What happens when I put someone on hold?

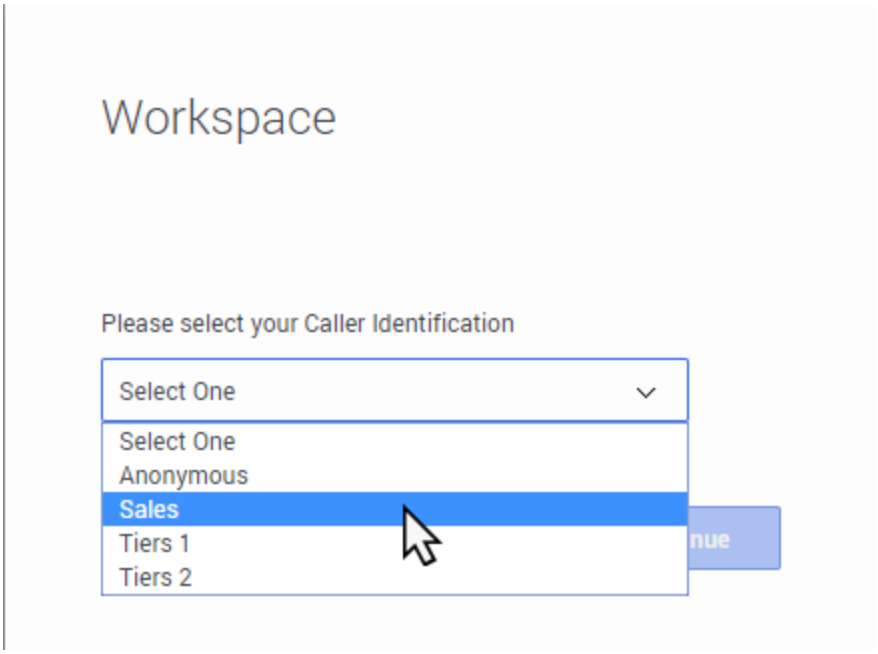


You can determine how long you have placed a caller on hold (if this feature is enabled).

After you click **Hold** ( ), a timer and progress bar begin to count the seconds that the call is on hold.

The progress bar changes from green to yellow to red as time goes by. If the progress bar changes to red, the call has been on hold too long. You can click **Resume** ( ) to update the contact and let them know that they are still on the call.

How do I manually select a caller ID?



When you make a call, you might have to choose a Caller Identification to be displayed on the phone of the contact. This feature might also be enabled for calls that you are transferring or conferencing.

The person you call receives the Caller ID you select. The previous Caller ID that you selected is selected by default. To hide your identity, you can select Anonymous if available. Ask your supervisor about when to use this feature.

How do I record a call?

The Call Recording functionality enables you to record the current voice interaction with a contact or an internal target. Agent Workspace supports two different types of call recording: **emergency recording** and **controlled call recording**. Your system administrator sets up the type of call recording support in your environment.

If your account is set up for emergency recording, you can start and stop recording by using a single toggle button.

If your account is set up for controlled recording, you can start a recording, pause a recording, resume a recording, and end a recording.

In addition, your account might also be set up for automatic or system-guided recording. With automatic call recording, you receive a notification that recording is in progress.

Call recording enables you to perform the following functions:

- **Record the call**: Select Record the Call ( ) to record a call. If your contact has opted out of call recording, this button is not available and a message is displayed informing you that the call is not

being recorded.

- **Stop recording the call**: Select Stop Recording the Call ( ) to stop recording a call that you are currently recording.
- **Pause recording the call**: Select Pause Recording the Call ( ) to pause recording a call that you are currently recording. Not all agents might have this feature.
- **Resume recording the call**: Select Resume Recording the Call ( ) to resume recording a call that is currently paused recording.

> **Tip**
>
> Your account might be enabled for either voice recording or screen recording. You can use the call recording buttons to control both voice recording and screen recording.

When you are recording a call, the call icon in the connected-parties area changes to red.

When you pause a call recording, the red call icon changes back to unavailable.

A Tooltip indicates both that the call is being recorded and the length of time of the recording.

A call-recording icon ( ) is displayed in the title bar of the Main View when a call recording is active.

How do I forward my calls?

> **Important**
>
> Call forwarding might not be available in your environment.

To forward calls to a different extension or phone number, on the selected media channel, in the **Forward** column, click **No Active Forward** and **Forward**.

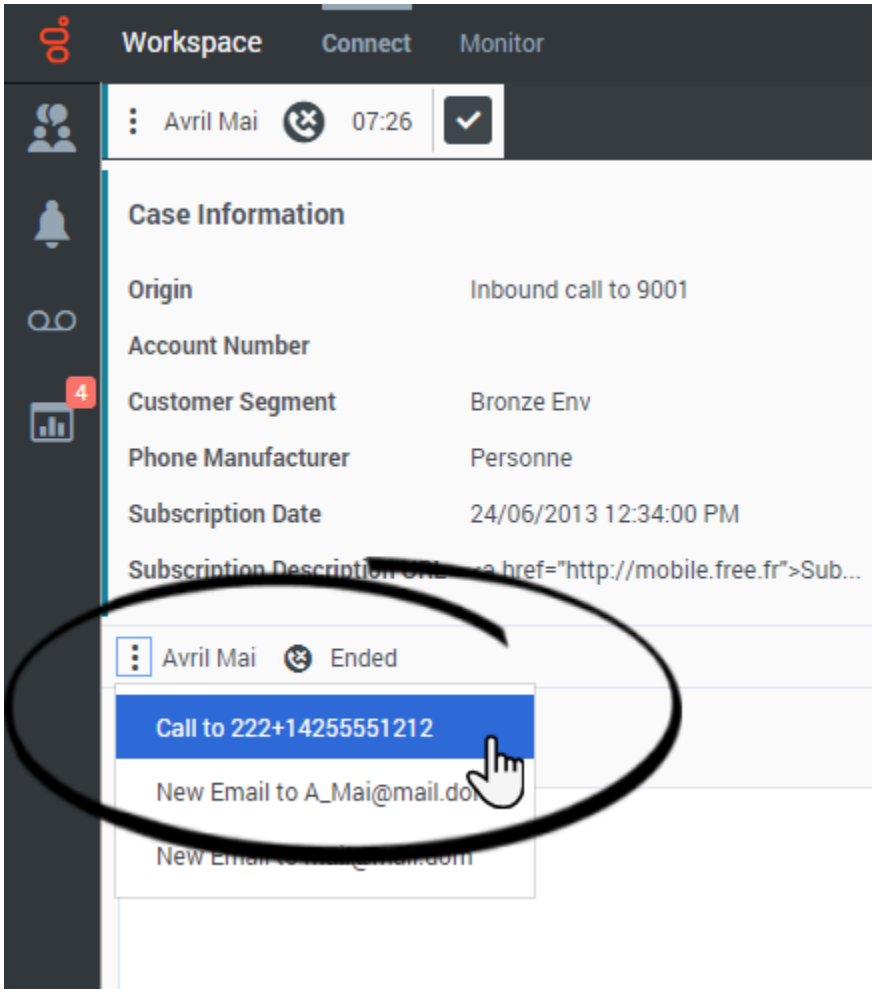
This action opens the **Forward** dialog box. Enter the number to which you want to forward your calls and click **Apply**. Click **Cancel** to return to the My Channels tab without forwarding your calls.

If you have an Active Forward set and you want to disable it, on the voice channel, in the **Forward** column, select **Forwarded to** , then select **Cancel Forward to** .

In the **Cancel Forward** dialog box, select **Yes** to cancel the forward. Canceling the forward removes the active forward and changes the Forward status to **No Active Forward**. To keep the forward active, select **No**.

> **Important**
> When an Active Forward is set, the application does not receive any calls.

How do I call someone back?



If you are handling a call and the call drops, you can call the contact back in one of two ways:

- Open Team Communicator, filtering for Recent Calls ( ), then select the contact.
- Open the **Party Action** menu and select the contact's phone number from the pop-up menu.

What next?

- Contacts
- Team Communicator
- Internal interactions

Top 5 topics

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