



Manage New Digital Contacts

The Webex Contact Center supports new digital channels—Facebook Messenger, WebChat, Email, SMS, and WhatsApp with enhanced capabilities. Digital channels enhance the reach of any business. With changing demographics and as well as individual habits, consumers expect to reach out to a business using the channel of choice—from anywhere, at any time, under any condition. Hence it is imperative for businesses to be available via all the popular channels of communication.

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Manage Facebook Messenger Conversations

Customers can reach out to agents through the Facebook Messenger on the Facebook page or via mobile app and agents can respond to the Facebook messages through the Facebook Messenger Widget. The Facebook Messenger Widget is a Cisco-offered widget that enables agents to respond to Facebook messages through the conversation pane.

You can use the desktop to transfer, conference, and end a Facebook Messenger conversation.

About Facebook Messenger Widget

The Facebook Messenger Widget supports the following features:

- [Text Attachments](#)
- [Templates](#)
 - [Attach a Template](#)
 - [Locked Templates](#)
 - [Templates with Replaceable Parameters](#)
 - [Templates with Dynamic Substitution of System Parameters in the Chat Console](#)
- [Rich Formatting](#)

- [Trigger Workflow](#)
- [Announcements](#)
- [Keyboard Shortcuts](#)
- [Delivery Receipts](#)

The Facebook Messenger Widget supports the following interactions:

- [Respond to Facebook Messenger Conversation, on page 2](#)
- [Transfer a Facebook Messenger Conversation, on page 3](#)
- [Start a Facebook Messenger Conversation Conference, on page 3](#)
- [End a Facebook Messenger Conversation, on page 4](#)

Respond to Facebook Messenger Conversation

Once a Facebook Messenger conversation is assigned to you, the contact request popover displays the Queue Name, Source Page, Timer, and **Accept** button. The timer indicates the time that has elapsed since you received the Facebook Messenger conversation.

To respond to a chat:

Before you begin

When you are in the **RONA** state, you cannot receive any more contact requests. To receive requests, you must manually change your state from **RONA** to **Available**.

Procedure

Step 1 Click the **Accept** button, in the request. The request opens in the compose box, and an interaction pane is displayed.

The agent can then view the following details in the interaction pane:

- Customer Name
- Queue Name
- Message Thread
- Agent Name
- Date
- Timer

Note The customer messages are represented by a gray bubble with the initials of the customer name inside the bubble. The agent messages are represented by a solid blue bubble.

Step 2 Enter your response in the compose box.

Note The compose box supports a maximum of 1000 characters. Whenever the character count exceeds the configured limit, the **Send** button is disabled, and an error message is displayed below the composer box in red to correct the character limit.

Step 3 Click **Send** or press **Enter** on your keyboard.
The customer receives the response.

Transfer a Facebook Messenger Conversation


If you cannot resolve a customer query and want to escalate the Facebook Messenger request, you can transfer the chat request to a different agent.

To transfer an active chat request to a queue or an agent:

Before you begin

You must have accepted the Facebook Messenger request. For more information, see [Respond to Facebook Messenger Conversation, on page 2](#).

Procedure

- Step 1** Click **Transfer**.
The **Transfer Request** dialog appears.
- Step 2** Choose from one of the following:
- **Queue**—You can either select the required queue from the drop-down list or use the search field to filter the list. The drop-down list displays the queues that are available to transfer the chat request.
 - **Agent**: You can either select an agent from the drop-down list, or use the search field to filter the list. The drop-down list displays the names of available agents. The agent name is preceded by a green icon. For more information, see [Agent Availability States](#).
- Step 3** (Optional) Click the  (**Refresh the List**) icon to retrieve the most recent list of queues and agents.
The retrieved list displays the current agent availability states.
- Step 4** Click **Transfer**.
The transfer request is initiated and the **Wrap Up Reasons** dialog box appears. For more information, see [Apply a Wrap-Up Reason](#).
- Note** Once you transfer the chat request to an agent, if the agent does not accept the chat request, the chat request is dropped.
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Start a Facebook Messenger Conversation Conference

To create a three-way conference chat request between you, the customer and another agent:

Before you begin

You must have accepted the Facebook Messenger request. For more information, see [Respond to Facebook Messenger Conversation, on page 2](#).

Procedure

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- Step 1** Click **Conference**.
The **Conference Request** dialog appears.
- Step 2** You can either select a specific agent from the drop-down list or use the search field to filter the list. The agent name is preceded by a colored icon indicating the current availability state. For example, the **Available** state is preceded by a green icon. For more information, see [Agent Availability States](#).
- Step 3** Click **Conference**.
When the conference chat request is accepted by an agent, the Interaction Control pane changes the state from **Conference Requested** to **Conference**. You can see a message that an agent has joined the chat.
- Step 4** Click **End Conference**.
The **Wrap Up Reasons** dialog box appears. For more information, see [Apply a Wrap-Up Reason](#).
- Note**
- The conferenced agent can exit the chat conference by clicking **Exit Conference**. Chat continues between you and the customer.
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End a Facebook Messenger Conversation

After you have helped your customer with queries, you must take consent from the customer to end the Facebook Messenger session. When you end the session, the **Wrap Up Reasons** dialog appears.

To close a Facebook Messenger session:

Before you begin

The agent must have accepted the Facebook Messenger request. For more information, see [Respond to Facebook Messenger Conversation, on page 2](#).

Procedure

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- Step 1** In the active Facebook Messenger session, click **End**.
The **Wrap Up Reasons** dialog box appears.
- Step 2** You can either select the required reason from the drop-down list or use the search field to filter the list.
- Step 3** Click **Submit Wrap Up**. For more information, see [Apply a Wrap-Up Reason](#).
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Manage SMS Conversations

Short Message Service (SMS) channel enables customers to reach out to agents by sending an SMS from anywhere and even when there is no data connectivity. Customers can send SMS to a Longcode, Shortcode, or toll-free number. A new chat is created in the SMS widget when a customer sends a message. Agents can then handle the chat and send a response to the customer.

The SMS widget is a Cisco-offered widget that enables agents to respond to SMS messages through the conversation pane in the Agent Desktop.

You can use the desktop to transfer, conference, and end an SMS conversation.

About SMS Widget

The SMS Widget supports the following features:

- [Templates](#)
 - [Attach a Template](#)
 - [Locked Templates](#)
 - [Templates with Replaceable Parameters](#)
 - [Templates with Dynamic Substitution of System Parameters in the Chat Console](#)
- [Trigger Workflow](#)
- [Announcements](#)
- [Keyboard Shortcuts](#)
- [Delivery Receipts](#)

The SMS Widget supports the following interactions:

- [Respond to SMS Conversation, on page 5](#)
- [Transfer an SMS Conversation, on page 6](#)
- [Start an SMS Conversation Conference, on page 7](#)
- [End an SMS Conversation, on page 8](#)

Respond to SMS Conversation

Once an SMS conversation is assigned to an agent, the popover displays the Queue Name, Phone Number, Source Number, Timer, and **Accept** button. The timer indicates the time that has elapsed since you received the SMS conversation.

Once an SMS conversation is assigned to an agent, it lands in the Task List pane available in the left-pane of the Agent Desktop. An agent can view the Queue Name, Phone Number, Source Number, Timer, and **Accept** button. The timer indicates the time that has elapsed since you received the SMS conversation.

To respond to a chat:

Before you begin

When you are in the **RONA** state, you cannot receive any more contact requests. To receive requests, you must manually change your state from **RONA** to **Available**.

Procedure

Step 1 Click the **Accept** button, in the request. The request opens in the compose box, and an interaction pane is displayed.

The agent can then view the following details in the interaction pane:

- Customer Name
- Queue Name
- Message Thread
- Agent Name
- Date
- Timer

Note The customer messages are represented by a gray bubble with the initials of the customer name inside the bubble. The agent messages are represented by a solid blue bubble.

Step 2 Enter your response in the compose box.

Note The compose box supports a maximum of 1000 characters. Whenever the character count exceeds the configured limit, the **Send** button is disabled, and an error message is displayed below the composer box in red to correct the character limit.

Step 3 Click **Send** or press **Enter** on your keyboard. The customer receives the response.

Transfer an SMS Conversation

If you cannot resolve a customer query and want to escalate the SMS request, you can transfer the chat request to a different agent.


To transfer an active chat request to a queue or an agent:

Before you begin

You must have accepted the SMS request. For more information, see [Respond to SMS Conversation, on page 5](#).

Procedure

Step 1 Click **Transfer**.

- The **Transfer Request** dialog appears.
- Step 2** Choose from one of the following:
- **Queue**—You can either select the required queue from the drop-down list or use the search field to filter the list. The drop-down list displays the queues that are available to transfer the chat request.
 - **Agent**: You can either select an agent from the drop-down list, or use the search field to filter the list. The drop-down list displays the names of available agents. The agent name is preceded by a green icon. For more information, see [Agent Availability States](#).
- Step 3** (Optional) Click the  (**Refresh the List**) icon to retrieve the most recent list of queues and agents. The retrieved list displays the current agent availability states.
- Step 4** Click **Transfer**. The transfer request is initiated and the **Wrap Up Reasons** dialog box appears. For more information, see [Apply a Wrap-Up Reason](#).
- Note** Once you transfer the chat request to an agent, if the agent does not accept the chat request, the chat request is dropped.
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Start an SMS Conversation Conference

To create a three-way conference chat request between you, the customer and another agent:

Before you begin

You must have accepted the SMS request. For more information, see [Respond to SMS Conversation, on page 5](#).

Procedure

- Step 1** Click **Conference**. The **Conference Request** dialog appears.
- Step 2** You can either select a specific agent from the drop-down list or use the search field to filter the list. The agent name is preceded by a colored icon indicating the current availability state. For example, the **Available** state is preceded by a green icon. For more information, see [Agent Availability States](#).
- Step 3** Click **Conference**. When the conference chat request is accepted by an agent, the Interaction Control pane changes the state from **Conference Requested** to **Conference**. You can see a message that an agent has joined the chat.
- Step 4** Click **End Conference**. The **Wrap Up Reasons** dialog box appears. For more information, see [Apply a Wrap-Up Reason](#).
- Note**
- The conferenced agent can exit the chat conference by clicking **Exit Conference**. Chat continues between you and the customer.
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End an SMS Conversation

After you have helped your customer with queries, you must take consent from the customer to end the SMS session. When you end the session, the **Wrap Up Reasons** dialog box appears.

To close an SMS session:

Before you begin

The agent must have accepted the SMS request. For more information, see [Respond to SMS Conversation, on page 5](#).

Procedure

- Step 1** In the active SMS session, click **End**.
The **Wrap Up Reasons** dialog appears.
- Step 2** You can either select the required reason from the drop-down list or use the search field to filter the list.
- Step 3** Click **Submit Wrap Up**. For more information, see [Apply a Wrap-Up Reason](#).
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Manage WebChat Conversations

WebChat channel enables businesses to engage and support their website visitors and customers.

Customers can initiate a WebChat with an agent and send chat messages. Agents can then handle the WebChat and send a response to the customer from the WebChat widget on the Desktop.

The WebChat Widget is a Cisco-offered widget that enables agents to respond to chat messages through the conversation pane.

You can use the desktop to transfer, conference, and end a WebChat conversation.

About WebChat Widget

The WebChat Widget supports the following features:

- [Text Attachments](#)
- [Templates](#)
 - [Attach a Template](#)
 - [Locked Templates](#)
 - [Templates with Replaceable Parameters](#)
 - [Templates with Dynamic Substitution of System Parameters in the Chat Console](#)
- [Trigger Workflow](#)
- [Announcements](#)

- [Keyboard Shortcuts](#)

The WebChat Widget supports the following interactions:

- [Respond to a WebChat Conversation, on page 9](#)
- [Transfer a WebChat Conversation, on page 10](#)
- [Start a WebChat Conference, on page 10](#)
- [End a WebChat Conversation, on page 11](#)

Respond to a WebChat Conversation

Once a WebChat conversation is assigned to an agent, the popover displays the Customers Name, Email, Queue Name, Timer, and **Accept** button. The timer indicates the time that has elapsed since you received the WebChat conversation.

To respond to a chat:

Before you begin

When you are in the **RONA** state, you cannot receive any more contact requests. To receive requests, you must manually change your state from **RONA** to **Available**.

Procedure

Step 1 Click the **Accept** button, in the request. The request opens in the compose box, and an interaction pane is displayed.

The agent can then view the following details in the interaction pane:

- Customer Name
- Queue Name
- Message Thread
- Agent Name
- Date
- Timer

Note The customer messages are represented by a gray bubble with the initials of the customer name inside the bubble. The agent messages are represented by a solid blue bubble.

Step 2 Enter your response in the compose box.

Note The compose box supports a maximum of 1000 characters. Whenever the character count exceeds the configured limit, the **Send** button is disabled, and an error message is displayed below the composer box in red to correct the character limit.

Step 3 Click **Send** or press **Enter** on your keyboard.

The customer receives the response.

Transfer a WebChat Conversation


If you cannot resolve a customer query and want to escalate the chat request, you can transfer the chat request to another agent or supervisor.

To transfer an active chat request to a queue or an agent:

Before you begin

You must have accepted the WebChat request. For more information, see [Respond to a WebChat Conversation, on page 9](#).

Procedure

- Step 1** Click **Transfer**.
The **Transfer Request** dialog appears.
- Step 2** Choose from one of the following:
- **Queue**—You can either select the required queue from the drop-down list or use the search field to filter the list. The drop-down list displays the queues that are available to transfer the chat request.
 - **Agent**: You can either select an agent from the drop-down list, or use the search field to filter the list. The drop-down list displays the names of available agents. The agent name is preceded by a green icon. For more information, see [Agent Availability States](#).
- Step 3** (Optional) Click the  (**Refresh the List**) icon to retrieve the most recent list of queues and agents.
The retrieved list displays the current agent availability states.
- Step 4** Click **Transfer**.
The transfer request is initiated and the **Wrap Up Reasons** dialog box appears. For more information, see [Apply a Wrap-Up Reason](#).
- Note** Once you transfer the chat request to an agent, if the agent does not accept the chat request, the chat request is dropped.
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Start a WebChat Conference

To create a three-way conference chat request between you, the customer and another agent:

Before you begin

You must have accepted the WebChat request. For more information, see [Respond to a WebChat Conversation, on page 9](#).

Procedure

- Step 1** Click **Conference**.
The **Conference Request** dialog box appears.
- Step 2** You can either select a specific agent from the drop-down list or use the search field to filter the list. The drop-down list displays the names of agents. The agent name is preceded by a colored icon indicating the current availability state. For example, the **Available** state is preceded by a green icon. For more information, see [Agent Availability States](#).
- Step 3** Click **Conference**.
When the conference chat request is accepted by an agent, the Interaction Control pane changes the state from **Conference Requested** to **Conference**. The customer and you can see a message that an agent has joined the chat.
- Step 4** Click **End Conference**.
The **Wrap Up Reasons** dialog box appears. For more information, see [Apply a Wrap-Up Reason](#).
- Note**
- Only you can end the chat conference and not the agent with whom you have conferenced.
 - The conferenced agent can exit the chat conference by clicking **Exit Conference**. The chat continues between you and the customer.
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End a WebChat Conversation

After you have helped your customer with queries, it is a good practice to ask the customer to end the chat session. When the customer ends the chat session, a message appears in the chat conversation indicating that the customer has left the chat.

When you end the chat session, the **Wrap Up Reasons** dialog box appears. If necessary, you can also end the chat. In that case, the customer sees a message saying that the agent has left the chat.

To close a chat session:

Before you begin

You must have accepted the WebChat request. For more information, see [Respond to a WebChat Conversation, on page 9](#).

Procedure

- Step 1** In the active chat session, click **End**.
The **Wrap Up Reasons** dialog box appears.
- Step 2** You can either select the required reason from the drop-down list or use the search field to filter the list. You can select more than one wrap-up reason at a time.
- Step 3** Click **Submit Wrap Up**. For more information, see [Apply a Wrap-Up Reason](#).
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Manage Conversations on Email

Email channel enables customers to send email messages with tables, embedded links, and attachments.

The email widget is a Cisco-offered widget that enables agents to respond to email messages through the conversation pane.

You can use the desktop to respond and transfer an email conversation.

About Email Widget

The email widget supports the following features:

- [Email Attachments](#)
- [Templates](#)
 - [Locked Templates](#)
 - [Templates with Replaceable Parameters](#)
 - [Templates with Dynamic Substitution of System Parameters in the Chat Console](#)
- [Rich Composer Modes](#)
- [Rich Formatting](#)

The Email Widget supports the following interactions:

- [Respond to an Email Conversation, on page 12](#)
- [Send a Quick Reply, on page 13](#)
- [Send a Standard Reply, on page 14](#)
- [Transfer an Email Conversation, on page 15](#)

Respond to an Email Conversation

Once a Email conversation is assigned to you, the popover displays the Customers Name, Email, Queue Name, Timer, and **Accept** button. The timer indicates the time that has elapsed since you received the Email conversation.

To respond to a chat:

Before you begin

When you are in the **RONA** state, you cannot receive any more contact requests. To receive requests, you must manually change your state from **RONA** to **Available**.

Procedure

Step 1 Click the **Accept** button, in the request. The request opens in the composer box, and an interaction pane is displayed.

The agent can then view the following details in the interaction pane:

- From email address
- To email address
- Email subject
- Email thread (if any)
- Timestamp and status of the email (Sent/Received/DRs)
- Announcements
- Attachments (if any in the inbound email)
- Reply, Reply All, Forward, and Cc icons
- Transfer button

Step 2 You can respond to the email in one of the following ways:

- Quick replies provide an instant way to respond to simple queries. For more information, see [Send a Quick Reply, on page 13](#).
- Standard replies allow you to format your text, add images to the message, attach files, and so on. For more information, see [Send a Standard Reply](#).

Step 3 Click **Send** on your keyboard.
The customer receives the response.

Send a Quick Reply

When an incoming email request requires a simple and short response, you can send a quick reply.

To send a quick reply:

Before you begin

You must be in the **Available** state to receive an email request.

Procedure

Step 1 Click **Accept** button, in the email request. The request opens in the email composer, and an interaction pane is displayed.

- The email conversation must be PCI compliant. You cannot share financial or health information in email conversations or attachments.

- At any point in time, you can only respond to the latest email.

Step 2 Enter the response in the **Quick reply here** composer box.

Step 3 Click **Send**.

Send a Standard Reply

You can send a standard reply if you want to format your email response, add images, attach files, or add more recipients.

To send a standard reply:

Before you begin

You must be in the **Available** state to receive an email request.

Procedure

Step 1 Click **Accept** button, in the email request. The request opens in the email composer, and an interaction pane is displayed.

Step 2 Click the  icon to view **Reply**, **Reply All**, and **Forward** options.

Step 3 Select the **Reply** option to send a reply only to the sender or select the **Reply All** option to respond to all the recipients or select the **Forward** option to send it to a new recipient.

- At any point in time, you can only respond to the latest email.
- If you receive a new email while replying (to an email), a banner message you are not replying to the latest email appears above the email composer. You will not be allowed to send an email until the latest email is read.
- When you **Reply** to an email, the To and Subject fields are auto-populated and cannot be edited.
- When you **Reply All** to an email, the To and Subject fields are auto-populated and cannot be edited. The Cc field gets pre-populated with original Cc of that email. You can add/edit email ids in the Cc field.
- When you **Forward** an email, the subject field is auto-populated. You can add/edit email ids in the To and Cc fields. The email body gets loaded with the latest email in the composer.
- When you switch from **Reply** to **Reply All**, the To fields are automatically populated, and the Cc field gets auto-populated with the original Ccs of that email and can be edited. The email body is saved as a draft.
- When you switch from **Reply** to **Forward**, the To and Cc field are emptied, and the email body is saved as a draft.
- When you switch from **Reply All** to **Forward**, the To and Cc field are emptied, and the email body is saved as a draft.
- When you switch from **Reply All** to **Reply**, the To field is automatically populated, the Cc field is emptied, and the email body is saved as a draft.

- When you switch from **Forward** to **Reply**, the To field gets automatically populated and the email body is saved as a draft.
- When you switch from **Forward** to **Reply All**, the To and Cc fields get auto-populated, and the email body is saved as a draft.

Step 4 (Optional) Click **Cc** to send a carbon copy of the email to more recipients.


Step 5 Compose the email in the email body.

Step 6 (Optional) You can apply [Rich Formatting](#).

Step 7 (Optional) You can add [Email Attachments](#).

Step 8 (Optional) You can attach [Templates](#).

If you enter the text in the composer and then select a template the existing text will be replaced with the template.

Step 9 (Optional) Click the  icon, to change the background and font colours of an email to light on dark.

Step 10 Click **View Original Email**, to view the initial customer email.

Step 11 Click the  icon beside each email in the email thread to view the complete email.

Step 12 Click **Send**.

Transfer an Email Conversation

If an email is misclassified or you cannot resolve a customer query, you can transfer the email to another queue. When you initiate the email transfer, you can select an email queue from the list of email queues in your enterprise. You cannot transfer an email to any specific agent or supervisor.

To transfer an email request to a queue:

Procedure

Step 1 Click **Transfer**.

The **Transfer Request** dialog box appears.

Step 2 You can either select the required queue from the drop-down list or use the search field to filter the list. The drop-down list displays the queues to which you can transfer the email request.

Step 3 Click **Transfer**.

The transfer request is initiated and the **Wrap Up Reasons** dialog box appears. For more information, see [Apply Wrap Up Reason](#).

Manage WhatsApp Conversations

The WhatsApp channel enables businesses to communicate with their customers efficiently through a simple, fast, and secure application. Customers can reach out to agents through the WhatsApp Business account and initiate a WhatsApp conversation by sending messages to the WhatsApp Business number. You can respond to the messages through the WhatsApp widget.

The WhatsApp widget is a Cisco-offered widget that enables you to respond to WhatsApp messages through the conversation pane in the Agent Desktop.

You can use the Agent Desktop to transfer, conference, and end a WhatsApp conversation.

About the WhatsApp Widget

The WhatsApp widget supports the following features:

- [Text Attachments](#)
- [Templates](#)
 - [Attach a Template](#)
 - [Locked Templates](#)
 - [Templates with Replaceable Parameters](#)
 - [Templates with Dynamic Substitution of System Parameters in the Chat Console](#)
- [Rich Formatting](#)
- [Emojis](#)
- [Trigger Workflow](#)
- [Announcements](#)
- [Keyboard Shortcuts](#)
- [Delivery Receipts](#)

Respond to a WhatsApp Conversation

When a WhatsApp conversation is assigned to you, the popover displays the Customers Name, Customer Phone Number, Source Number, Queue Name, and Accept button. A timer displays the time elapsed since you received the WhatsApp conversation.

Before you begin

When you are in the **RONA** state, you can't receive any more contact requests. To receive requests, you must manually change your state from **RONA** to **Available**.

Procedure

- Step 1** Click the **Accept** button in the request.
- The request opens in the compose box and the Interaction Control pane appears that shows the following details:
- Customer Name
 - Queue Name
 - Source Number
 - Customer Phone Number
 - Message Thread
 - Timestamp
 - Read receipts
- The customer messages are represented by a gray bubble with the letter C inside the bubble. The agent messages are represented by a solid blue bubble.
- Step 2** Enter your response in the compose box. The composer box supports a maximum of 4096 characters.
- If you exceed the allowed character limit, the **Send** button is disabled. An error message is displayed to remind you that you need to delete characters.
- Step 3** Click **Send** or press **Enter** on your keyboard.
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Transfer a WhatsApp Conversation

If you can't resolve a customer query and want to escalate the WhatsApp request, you can transfer the request to a different agent.

Before you begin

You must have accepted the WhatsApp request. For more information, see [Respond to a WhatsApp Conversation, on page 16](#).

Procedure

- Step 1** Click **Transfer**.
- Step 2** Perform one of these options:
- Choose a specific agent from the drop-down list.
 - Use search criteria to filter the list.
- Step 3** Choose one of the following options:

- **Queue:** Choose the required queue from the drop-down list or use the search field to filter the list. The drop-down list displays the queues that are available to transfer the WhatsApp request.
- **Agent:** The drop-down list displays the names of available agents. Choose an agent from the drop-down list or use the search field to filter the list. The agent name is preceded by a green icon. For more information, see [Agent Availability States](#).

Step 4 (Optional) Click the **Refresh the List** icon to retrieve the current list of queues and agents. The list displays the current agent availability states.

Step 5 Click **Transfer**.

The transfer request is initiated, and the **Wrap Up Reasons** dialog box appears. For more information, see [Apply a Wrap-Up Reason](#).

Note If the agent doesn't accept the WhatsApp request that you transferred, the WhatsApp request drops.

Start a WhatsApp Conversation Conference

You can create a three-way conference WhatsApp request between you, the customer, and another agent.

Before you begin

You must have accepted the WhatsApp request. For more information, see [Respond to a WhatsApp Conversation, on page 16](#).

Procedure

Step 1 Click **Conference**.

Step 2 Perform one of these options:

- Choose a specific agent from the drop-down list.
- Use search criteria to filter the list.

Step 3 Choose one of the following options:

- **Queue:** Choose the required queue from the drop-down list or use the search field to filter the list. The drop-down list displays the queues that are available to transfer the WhatsApp request.
- **Agent:** The drop-down list displays the names of available agents. Choose an agent from the drop-down list or use the search field to filter the list. The agent name is preceded by a green icon. For more information, see [Agent Availability States](#).

Step 4 Click **Conference**.

The Interaction Control pane changes to the **Conference** state. When the chosen agent accepts the conference request, you and the customer see a message that another agent has joined the conversation.

Step 5 When you complete the conference, click **End Conference**.

Note The conferenced agent can click **Exit Conference** to exit the WhatsApp conference. The conversation continues between you and the customer.

The **Wrap-up Reasons** dialog box appears. For more information, see [Apply a Wrap-Up Reason](#).

End a WhatsApp Conversation

After you have helped your customer, it is a good practice to ask the customer to end the WhatsApp session. When the customer ends the WhatsApp session, the WhatsApp conversation displays a message that the customer has left the session.

If necessary, you can end the WhatsApp session. In this case, the customer sees a message that you have left the session.

Before you begin

You must have accepted the WhatsApp request. For more information, see [Respond to a WhatsApp Conversation, on page 16](#).

Procedure

Step 1 In the active WhatsApp session, click **End**.

Step 2 Perform one of these actions:

- Select the wrap-up reasons from the drop-down list.
- Use the search criteria to filter the list and choose the wrap-up reasons.

You can select more than one reason. For more information, see [Apply a Wrap-Up Reason](#).

Step 3 Click **Submit Wrap Up**.
