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# Genesys Multicloud CX User Guide

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## Introduction to the Genesys Multicloud CX User Guide.

This User Guide describes the elements of the Genesys Multicloud CX Service that are available for consumption. Only elements specified in a Genesys Services Order will be made available to any individual customer as indicated in the agreement.

- Genesys Multicloud CX Service elements
- Digital
- Inbound
- Routing
- Analytics
- Outbound
- Self-Service and Automation
- Collaboration
- Workforce Engagement Management
- Omnichannel Desktop
- Integration
- Open Platform

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This User Guide includes information about the Genesys Multicloud CX policies.

- Genesys Multicloud CX Data Retention Policy
- Wireless out-of-band management
- Support
- Genesys Multicloud CX billing measurement definitions
- Accessibility

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For detailed documentation about the Genesys Multicloud CX platform, visit the Multicloud Resource Center.

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- [Genesys Multicloud CX customer documentation](#)
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# Genesys Multicloud CX Service elements

An introduction to the Genesys Multicloud CX Service elements.

Genesys Multicloud CX leverages the world-class SIP-based contact center and Genesys Voice Platform (GVP)/Media Services products at the service's core and is offered on a subscription basis. Usage-based aspects of the service can be provisioned to meet the needs of customers, whether they have a large number of users, have need of on-premises integration with the service, or require enhanced routing and reporting. Built on Genesys' market-leading universal queuing and routing features, the Genesys suite supports blended seats, including blending inbound and outbound voice, digital channels, native and external workitems. Rounding out the portfolio is a set of optional features to help customers optimize their contact centers, including the new Genesys Cloud CX Workforce Engagement Management offering.

Your subscription to Genesys Multicloud CX includes attributes such as:

- Global coverage, including the United States (US), Canada, Asia Pacific (APAC), and Europe
- Georedundant high availability and disaster recovery
- Scalability to more than 10,000 agents per tenant customer
- PCI-DSS, ISO27001, HIPAA, and SOC compliance as well as conformance with the EU GDPR

# Digital

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- [1 Chat](#)
- [2 Email](#)
- [3 SMS](#)
- [4 Web callback](#)
- [5 Co-browse](#)
- [6 Widgets](#)
- [7 Social Engagement \(Facebook and Twitter\)](#)
- [8 WhatsApp Messaging](#)
- [9 Genesys Predictive Engagement](#)

Describes Genesys Multicloud CX Digital.

Enabling personalized communications with your customers over digital channels is a critical requirement for an effective and empathetic contact center. From web and mobile chat, email and SMS to public social posts and third-party messaging apps, Genesys brings together an omnichannel agent desktop with consolidated routing and reporting to give you the tools to create the best agent and customer experiences.

Chat  

Genesys Advanced Chat provides both live and asynchronous assistance to your web and mobile customers, allowing for long-lived meaningful conversations. Advanced Chat includes the ability to send and receive emojis, images, and other files, plus it integrates seamlessly with our chatbot solution and Genesys Predictive Engagement for proactive invitations to chat.

Email  

Genesys Email allows our customers to effectively capture, manage, and respond to customer email inquiries with the same routing, agent desktop and reporting as your Genesys Multicloud CX voice interactions. Genesys Email uses your business rules and defined SLAs to categorize and constantly re-prioritize your backlog of messages before routing them to the best available resource.

SMS  

Genesys SMS provides a convenient way for enterprises to engage with customers over a fast and easy channel. Use short codes, local, and toll-free numbers to communicate to any phone, anywhere in the world. Also includes support for multimedia messaging (MMS) to enhance your SMS conversations.

Web callback  

Web Callback enables end consumers to click on a “request callback” link on a website, input data on a webform, and request a callback from the customer either immediately or at a scheduled time. Callback reporting provides active (real-time) and analytic (historical) views of how effectively your callback strategy is meeting consumer needs.

## Co-browse

**IMPORTANT NOTE:** Genesys Co-browse is available only to existing customers who currently subscribe to the service. Customers wishing to add a co-browsing service to their Genesys Multicloud CX subscription should contact their Genesys representative for available options.

Genesys Co-browse lets consumers and customer service agents conduct co-browsing sessions that, in conjunction with real-time chat or phone support, enable more effective and personalized online assistance. By being able to view what online consumers are seeing, the agent can help with everything from resolving shopping questions to completing forms and applications.

## Widgets

Genesys Widgets provides a library of configurable, extensible, dynamic, and context-aware business widgets, which incorporate the user interface, business logic, and connections to your backend Genesys Multicloud CX Services. Genesys Widgets can be used on websites and in web applications to provide a personalized experience for your consumers:

- Web and Mobile Chat
- Callback
- Click-to-Call
- Co-browse

## Social Engagement (Facebook and Twitter)

There's no getting around it – customers today are talking about your business on social media – either hoping to interact with you directly or sharing opinions with others about their experiences with your business. Genesys Social Engagement allows companies to:

- Manage and reply to comments on public posts that need attention, including Twitter handles and mentions.
- Conduct private conversations across Facebook Messenger & Twitter Direct Messaging.
- Handle public-to-private conversations for higher customer satisfaction.

## WhatsApp Messaging

Manage long-lived, asynchronous WhatsApp interactions in your Genesys Multicloud CX solution to offer customers the convenience of messaging within the fastest-growing messaging channel in the world. Supports outbound template messages, bots, and linking to existing customer profiles.



## Genesys Predictive Engagement

Genesys Predictive Engagement uses machine learning and AI to build predictive models in real time to segment visitors, prospects, and customers into Personas to determine the ideal moments to engage with them. Currently, Chat and Content Offers are supported. Create your desired business outcomes and action maps to support personalized proactive engagement. To learn more about Predictive Engagement, visit the Resource Center.

# Inbound

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- [1 Inbound Voice Routing and Traffic](#)
- [2 Post-call Voice Survey](#)
- [3 Private and Group Voicemail](#)
- [4 Queue Callback](#)
- [5 Designer \(Voice and Digital\)](#)
- [6 Predictive Routing with Designer](#)
- [7 Designer Omnichannel Applications](#)
- [8 Context Routing](#)

Describes Genesys Multicloud CX Inbound.

Genesys Inbound enhances your contact center infrastructure, empowering you to create an optimal experience with every interaction. Genesys Inbound is the right contact center infrastructure to seamlessly connect and interact with customers.

## Inbound Voice Routing and Traffic

Using operational parameters and rules, administrators can control both custom routing strategies installed at the time of provisioning, and pre-defined templates made available with the service. The customer's contact center hours of operation are an example of an operational parameter that can be configured by administrators.

The inbound voice IVR service includes standard DTMF signaling and supports advanced options including Text to Speech (TTS). Automatic Speech Recognition (ASR) is currently available for Genesys CX on AWS and will be available in Q3 2021 for Genesys CX on Azure.

With the rich control afforded by operational parameters and rules, administrators have a web-based mechanism to control the service in near real time. More complex routing changes may require either a Move/Add/Change/Delete (MAC/D) Services Order (placed with Customer Care) or a Statement of Work (SoW) through Professional Services, depending on the complexity of the requirement.

Routing Analytics provide the ability to view, in near real time and historically, the effectiveness of your routing applications to better understand your customer experience.

Throughout the lifecycle of the service, the Genesys Multicloud CX Customer Portal (also known as Portal) will evolve to allow more customer administrative and routing changes to be made without a MAC/D Services Order. Customers will always have the option of engaging Professional Services (via a SoW) to make more complex changes.

## Post-call Voice Survey

The Voice service includes an integrated and simple-to-engage voice survey option that allows for reliable measurement of customer satisfaction through post-call surveys that include the ability to capture and report on metrics related to the user experience.

## Private and Group Voicemail

Genesys Voicemail enables group and personal voicemail. Features include the capture of messages,

playback, deletion, and storage, as well as a Message Waiting Indicator on the Agent Workspace. Email notification is also supported.

## Queue Callback

The Genesys queue callback service allows consumers to request a callback when they are in queue, either as soon as possible, or at a scheduled time. Callback reporting provides active (real-time) and analytic (historical) views of how effectively your callback strategy is meeting your customers' needs.

## Designer (Voice and Digital)

Genesys Designer provides a simple intuitive web-based interaction flow design tool. It supports both self-service and assisted-service call flows and digital flows. Designer includes predefined routing blocks to support after-call voice surveys as well as immediate and scheduled callback. This same administration tool also provides support for managing operational parameters and announcements.

## Predictive Routing with Designer

Predictive Routing with Designer determines the best possible match between waiting interactions and available agents by drawing on accumulated agent and interaction data, analyzing interactions and outcomes, and generating models to predict outcomes.

## Designer Omnichannel Applications

Build your self-service and routing applications once and point the application to voice, chat, email, and other digital channels.

## Context Routing

Genesys Context Routing allows businesses to access their customer data to personalize the voice, IVR, and digital routing experiences for their consumers.

Most common use cases:

1. **Observed Customer Preference** – Personalize IVR menus based on customer preference.
2. **Customer Value Segmentation** – Provide specialized routing or menus based on customer value.

3. **Campaign Response** - Recognize when an interaction is in response to an outbound campaign.
4. **Third-Party Activity** - The routing application checks a third-party for service status - like cable router offline. For phone calls, the customer can bypass standard IVR menus and get routed to the right agent based on the type of issue.

# Routing

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- [1 Intelligent Workload Distribution \(IWD\)](#)
- [2 Predictive Routing](#)

Describes Genesys Multicloud CX Routing.

Genesys Multicloud CX offers customers some of the most sophisticated interaction routing capabilities in the contact center industry. Benefits include a reduction in handle time and improved first contact resolution.

### Intelligent Workload Distribution (IWD)

Genesys Multicloud CX Intelligent Workload Distribution (IWD) is a business application for dynamically prioritizing the distribution of work tasks to the employees best suited to handle them. IWD captures work items from any system, continuously prioritizing and classifying the work to push the work to the best available employee, in order to meet defined SLAs together with the best customer experience.

IWD works in concert with existing enterprise software applications (such as ERP, BPM, DCM, Salesforce) as well as homegrown legacy systems, to create a universal task list, which is sorted based on business value. IWD comes with specific integration capabilities called capture points, which support RESTful APIs to ingest tasks and webhooks to keep the source systems informed on all changes pertaining to these tasks.

Built-in task management and near real-time dashboards give administrators granular control over their backlog of work items.

### Predictive Routing

Genesys Predictive Routing identifies the best employee to handle a specific interaction with a specific customer, optimizing the business outcome based on historic and real-time data.

Predictive Routing improves KPIs related to customer service and sales use cases. For customer service, the KPIs include Average Handle Time (AHT), Net Promoter Score (NPS), and First Call Resolution (FCR). Sales use cases can improve metrics such as Collection Pay Rate, Churn Reduction, and Sales Conversion Rate.

Predictive Routing is a managed service that builds upon existing customer data and skills-based routing.

# Analytics

## Contents

- [1 Reporting \(Real-time and Historical\)](#)
- [2 Designer Analytics](#)



Describes Genesys Multicloud CX Analytics.

In the daily operations of a contact center, data, context and event streams are generated through customer engagement, business optimization and employee actions by people, machines or the web. With our reporting and analytics capabilities, information is visualized in a user interface for analysis, decision support and business optimization. Users of reporting and Designer Analytics can filter, group, drill, sort and change the presentation style to visualize and understand why they are seeing anomalies or expected results.

### Reporting (Real-time and Historical)

The service includes operational and historical reporting. Web-based, near real-time operational reporting is provided through a standard set of reporting templates or widgets. New operational reporting templates can be authored and/or customized by Genesys for additional fees.

For historical reporting, many configurable templates are available. Users can directly tailor historical reports using filters and drill-down features of the existing reports, as well as modify or build a new report with a few drag-and-drop maneuvers via a standard web-enabled user interface. Custom reports can be saved in a shared repository or to the desktop for offline use. The reports can be accessed subject to role-based restrictions and automatically distributed via various media, including mobile devices. Users can download detailed interaction information to perform additional analytics based on the customer's business requirements.

### Designer Analytics

Designer Analytics offers a close-to-real-time view of what is happening in your contact routing environment.

# Outbound

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- [1 Voice Outbound](#)
- [2 Proactive Outbound - SMS and Email](#)

Describes Genesys Multicloud CX Outbound.

Designed to meet the needs of the business user, Genesys Multicloud CX Outbound provides advanced control capabilities for outbound users.

### Voice Outbound

The Genesys Multicloud CX-based dialer lets you develop sophisticated outbound contact strategies that leverage preview, predictive, and progressive dialing.

- Preview Dialing – Distribute calls from a list to the agent’s desktop on request.
- Progressive Dialing – Initiate an outbound call when an agent is available and no calls are in queue.
- Predictive Dialing – Leverage a predictive dialing algorithm to pace outbound calls, including compliance, auto pacing, and unproductive call filtering (voicemail, busy, disconnected numbers).
- Blending Inbound/Outbound – The dialer supports the blending of inbound calls and outbound campaigns, allowing agents to balance their time in a manner that delivers higher customer satisfaction and service levels.
- Outbound Automated Voice Messaging – Automated message notification service enables you to proactively notify customers about upcoming appointments, prescription availability, or other key events.

Separate provisioning fees will apply for Genesys to create and manage outbound dialing campaigns and enable blended inbound/outbound dialing on the customer’s behalf.

### Proactive Outbound – SMS and Email

Genesys Outbound SMS and Email supports automated one-way and interactive text or email message campaigns to customers without involving an agent. Included is the ability to create standalone message campaigns or sophisticated multi-channel, blended outbound campaigns using Dialer, Outbound IVR, Text and/or Email channels that leverage escalation capabilities based on the results of previous contact attempts. Campaigns can be scheduled in advance or individual messages can be sent on demand. Both email and SMS messages can be personalized.

For SMS, Genesys supports short codes, text-enabled toll-free numbers, long codes, and alpha sender IDs.

Outbound SMS and Email can be used for marketing and sales promotions, proactive status notifications, collections efforts, and interactive surveys.

When used in conjunction with the inbound SMS and Email routing services, customer responses to

## Outbound

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proactive email and SMS messages can be routed to an appropriately skilled and enabled agent to continue the conversation.

# Self-Service and Automation

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- [1 Enterprise IVR](#)
- [2 Platform as a Service \(PaaS\) IVR](#)
- [3 Chatbots Support](#)
- [4 Voicebots Support](#)

Describes Genesys Multicloud CX Self-service and automation.

Using self-service and automation capabilities in your contact center allows you to automate all or part of a customer interaction with your business. This makes your contact center more efficient and streamlines the customer experience. Designer integrates third-party bot capabilities for voice and digital interactions, and Genesys IVR for voice interactions.

## Enterprise IVR

The Genesys Multicloud CX Enterprise IVR solution delivers rich self-service IVR capabilities that are authored in Designer. Designer includes a set of web interfaces to enable administrative control, and provides both call and application reporting. Genesys Multicloud CX self-service customer engagement solutions are solely based on IVR, without agent engagement; however, the solution is designed to integrate with the customer's standard call routing and computer telephony integration (CTI) systems to provide an integrated caller experience when self-service becomes assisted service and callers opt to speak to an agent.

## Platform as a Service (PaaS) IVR

The Platform as a Service IVR solution provides similar self-service capabilities to Enterprise IVR, including speech recognition and text-to-speech services. However, PaaS IVR enables the customer to continue to use their existing on-premise applications and tools. Calls are placed to the Genesys Multicloud CX platform, and customer applications are retrieved at runtime by the PaaS IVR platform. The customer retains application development, reporting, and back-end integrations on their own premises. PaaS IVR can help customers take a measured step towards Genesys Multicloud CX, while continuing to maintain their own application tier. PaaS IVR also enables customers to perform phased migrations to Enterprise IVR.

PaaS IVR supports pure self-service, as well as call transfer to a customer demarcation point. Subsequent routing to customer-hosted assisted service (agents) is handled by the customer. PaaS IVR can also support routing to Genesys Multicloud CX agents, enabled through a Professional Services engagement. PaaS IVR includes administrative and reporting capabilities.

PaaS IVR supports the Genesys Intelligent Automation platform as a premise application server. Other VoiceXML-compatible premise application server platforms can be used as well. Contact Genesys Product Management for details.

## Chatbots Support

Customers may use Designer to create a chatbot using Amazon Lex, Microsoft Luis or Google Dialogflow. With Genesys chatbots, you can:

- Automate tasks and assist with queries across multiple channels—web, mobile, social, SMS, and messaging apps
- Alleviate strain on your contact center employees while improving the customer experience and controlling costs

Chatbots can be configured and handed over to an agent within business hours or offer a callback when outside of business hours or at busy times.

## Voicebots Support

Voicebots provide AI-driven natural language understanding, allowing rich self-service of voice interactions. Voicebots increase self-service containment and enhance the customer experience through natural language. Voicebots support includes:

- AI-driven Natural Language Understanding
- Third-party speech-to-text, text-to-speech and intent determination
- Designer support for:
  - Amazon Lex
  - Google Dialogflow
- Mix and match native and third-party bots even within a single interaction

# Collaboration

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- [4 Desk Phone Support](#)



Describes Genesys Multicloud CX Collaboration.

Genesys Multicloud CX supports the interoperability and collaboration of end points in various connection modes. Customers can choose the proper softphone or desk phone to fit agent needs and required experience.

## Genesys Softphone

Genesys softphone for voice calls that seamlessly integrates with the agent desktop user interface.

## WebRTC Media Service

Agents can use a browser-based softphone using the WebRTC protocol.

## PSTN & PBX Based Agents

Agents may use any PSTN-based or PBX-based phone set as long as the phone has Direct Inward Dialing (DID).

## Desk Phone Support

Hard phone SIP support is either directly connected to Genesys Multicloud CX or serviced from another SIP-enabled solution. Please note that Genesys hosted Engage Azure currently does not support Desk Phone.

# Workforce Engagement Management

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  - 1.2 IVR Recording
  - 1.3 Screen Recording
  - 1.4 Quality Management
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Describes Genesys Multicloud CX Workforce Engagement Management (WEM).

Genesys Workforce Engagement Management is a comprehensive, automated software application that accurately forecasts, schedules and tracks the performance of multi-skilled employees in single and multi-site front and back-office environments. It is the only integrated workforce management system to offer automatic updates of historical data and employee skill information in real time across all interaction channels to ensure the most accurate planning.

Genesys Workforce Engagement Management  

### Genesys Interaction Recording

To address the quality recording needs, users can record all calls or just a portion. Call recordings can be based on standard telephony information or call routing data. For example, you can choose to record only “platinum customer” calls. All caller data you identify as relevant is also stored with the recording, enabling search. For example, you can search by standard telephony information such as caller ID. Call recordings can also be paused and resumed based on external events; for example, the service can trigger a pause during the collection process so that credit card information is not recorded. Users can access call recordings from any location with secure network connectivity.

### IVR Recording

Call recordings can optionally include the IVR portion of each voice interaction. This allows for complete end-to-end capture of the customer experience from IVR answer to Agent hang up.

### Screen Recording

Users can record computer screens for either all voice interactions or just a portion. When enabled, screen recordings are captured as adjunct resources when the voice interactions are recorded.

### Quality Management

To address the needs of both training and quality purposes, users can listen to, score, and administer call recordings as part of a larger quality management program.

### Workforce Management

The service delivers a comprehensive Workforce Management (WFM) solution, allowing forecasting, scheduling, adherence, and other standard administrative tasks through a web-based interface. By providing minimal configuration requirements and a rich set of pre-built contracts, shifts, and breaks, WFM makes it easy to get started. Users can see their current schedules through a standard web-based interface, while supervisors can view schedules, make shift adjustments, and perform schedule

swaps. Additional WFM capabilities can also be configured by Professional Services as an optional service under a SoW.

### Interaction Analytics – Speech

You can analyze up to 100% of agent/customer recordings to uncover why customers are contacting your company, what are their topics of conversation, why multiple contacts are needed to resolve specific issues, what processes cause customer frustration and whether your agents are providing an appropriate level of service.

# Omnichannel Desktop

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- [1 Agent Workspace](#)
- [2 Supervisor Workspace](#)
- [3 CRM Adapter](#)
  - [3.1 Gplus Adapter for Salesforce](#)
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- [4 Agent Scripting \(AppFoundry\)](#)

Describes Genesys Multicloud CX Omnichannel Desktop.

Omnichannel Agent Workspace enables the contact center agents to communicate with customers and team members through phone calls and Genesys Digital channels.

## Agent Workspace

Genesys Workspace Web provides a web-based agent desktop that supports a variety of consumer interaction channels. The service can be easily integrated with a defined set of customer relationship management (CRM) or back-office applications via standard Genesys adapters. The service can also centralize multiple web applications through a common interface and facilitate desktop navigation and workflow.

The agent workspace provides a variety of flexible configuration options that can be provisioned by the customer administrator. Options include:

- Providing a screen pop with the relevant attached data, including the ability to pass this attached data to a defined URL.
- Displaying consumer interaction history on recent interactions.
- Displaying user and service statistics.
- Setting Not Ready Reason codes and Disposition codes.

## Supervisor Workspace

The web-based Genesys Supervisor workspace desktop supports a variety of functions required by supervisors to accurately lead and manage their teams. The supervisor workspace includes the ability to:

- Monitor voice and chat interactions with coach and barge-in support for monitored interactions.
- Provide QA review of emails.
- Monitor and manage agent states.
- Manage and edit interaction queues and workbins.

## CRM Adapter

The combination of Genesys with CRM applications significantly improves agent and enterprise productivity. Genesys provides the following integration options for the most popular CRM.

### Gplus Adapter for Salesforce

Genesys Gplus Adapter for Salesforce enables integration of the Genesys Agent Workspace with Salesforce Sales or Service Cloud. In addition to the features provided by the Agent Workspace, the adapter includes key integration points:

- “Screen Pop” – display and/or create a Salesforce object such as contact, account, or case, or open a Sales for Object Flow.
- Create an Activity Task as a log of the call, with standard and customizable exchange of information between Genesys and Salesforce.
- Invoke Salesforce Apex.
- Support for the Service Client API to be invoked from Salesforce.
- Click-to-dial from Salesforce phone number fields.

### Gplus Adapter for Microsoft Dynamics 365

Genesys Gplus Adapter enables you to integrate inbound voice interactions with MS Dynamics 365 Sales or Customer Service applications. It offers screen pop of Dynamics 365 entities such as contact, account, or cases. Voice-interaction controls allow access to interaction controls such as accept, reject, end, hold, resume, transfer, and conference.

- Support for Microsoft Dynamics 365 Cloud Customer Engagement Application, Sales or Customer Service application.
- Support for Microsoft Dynamics 365 Channel Integration Framework (CIF) V 1.0.
- Support for Microsoft Dynamics 365 Channel Integration Framework (CIF) V 2.0.
- Support for Microsoft Universal Service Desk using CIF V1.0 or 2.0.

### Gplus Adapter for ServiceNow

Genesys Gplus Adapter enables you to integrate inbound voice interactions with ServiceNow. It offers screen pop of ServiceNow objects such as contact, account, or cases. Voice interaction controls allow access to interaction controls such as accept, reject, end, hold, resume, transfer, and conference. Other features include basic agent real-time performance tracker and click-to-dial outbound calling from ServiceNow.

- Support for ServiceNow Geneva or later releases.
- ServiceNow Customer Service Management application needs to be enabled.

## Agent Scripting (AppFoundry)

Agent Scripting is available through our AppFoundry marketplace from various third parties. These scripting tools can be used to prompt agents through the call-handling process with customers. They can be used for either inbound customer service or outbound telemarketing calls. Agent Scripting is a powerful tool that supports branching to guide agents through different paths of the script, depending on the customer's answers to scripted questions. Additionally, agents can capture information about customers and update the customer database, process orders, or track ongoing customer service calls.



# Integration

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- **2 Task Routing**
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- **4 AppFoundry**

Describes Genesys Multicloud CX Integration.

Genesys Multicloud CX includes many capabilities which make integration and customization of your contact center faster and easier.

Supported APIs  

### WWE Service Client API

The WWE Service Client API enables developers to create custom agent applications that integrate with Genesys Multicloud CX services. These applications can include features such as state management, call control, supervisor monitoring, and call recording.

### Genesys Multicloud CX Provisioning API

Configure tenant environment, create users, and retrieve configuration data.

### Genesys Multicloud CX Statistics API

Create a subscription for multiple statistics and receive notifications when values of those statistics change.

### Genesys Multicloud CX Workspace APIs for Voice and Chat

Develop your own custom agent applications that integrate with Genesys Voice and Chat.

### Genesys Engagement Services (GES) APIs

GES APIs support your mobile applications and can be used to query Genesys Multicloud CX for Estimated queue wait time, Hours of Operation, Available Timeslot, and Create/Query/Cancel Callback.

Task Routing  

Task Routing allows you to implement a single orchestrated routing platform for all interaction types. You can use our REST API from your on-premises or cloud application to submit interactions to Genesys Multicloud CX. The Task Routing API also supports 'get info' and updating attached data.

## Bulk Data Export – WFM, Infomart, and Interaction Recordings



The Genesys Multicloud CX service includes the ability to provide data export services for integration into your on-premises system of records solutions. This includes the ability to export and integrate data collected from:

- Agent, Queue, Call Flow, and Interaction metrics across all channels (Historical Data Feed)
- Genesys Multicloud CX Workforce Management (WFM ETL)\*
- Voice and Screen recordings and metadata (Recording Call Backup Service (RCBS), used in conjunction with GIR)\*
- Voice Recordings (Recording Connector)\*\*
- QM evaluations and GIA categories (QM&GIA Data Export)\*

Data exports are automated and can be downloaded based on the customer-preferred schedule.

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\*Genesys CX on AWS only.

\*\*Genesys CX on Azure only.



The Genesys AppFoundry marketplace makes it easier for our Genesys Multicloud CX customers to access extended solutions built specifically for vertical and business needs. With AppFoundry, the broad community of Genesys Multicloud CX customers can easily find custom contact centers and customer experience applications available from third parties.

# Open Platform

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Describes Genesys Multicloud CX Open Platform.

Creating and integrating a diverse set of CX systems and services is difficult. Genesys Multicloud CX provides you with the tools to meet the unique challenges and needs of your business.

## Infrastructure

Genesys is responsible for all aspects of the Genesys Multicloud CX Service infrastructure located between the points of service demarcation with the customer’s network, including Genesys-provided third-party applications, and other software, servers, select telecom services, load balancing, disaster recovery, capacity management, and more. Genesys’ role and responsibility is further subject to the Genesys Multicloud CX Customer Care Support Guide. The service is available in the following regions, subject to current country-specific legal or regulatory constraints.

Genesys CX on AWS	<ul style="list-style-type: none"><li>• USA</li><li>• Canada</li><li>• Europe</li><li>• APAC</li></ul>
Genesys CX on Azure	<ul style="list-style-type: none"><li>• March 31, 2021: United States of America</li><li>• April / May 2021: Europe</li><li>• End of September 2021: APAC</li></ul>

## Supported Standards and/or Certifications

- SOC-II
- ISO 27001
- GDPR
- PCI-DSS
- HIPAA

## Portal

The main access point to all Genesys Multicloud CX user interfaces is the Genesys Multicloud CX Portal. The interfaces on the Portal are divided into three separate categories:

- **User interfaces** – standard interfaces to contact center services such as Agent and Supervisor workspace, Workforce Management, and Reporting. These interfaces are used by agents, supervisors, and managers.
- **Administration interfaces** – used by Contact Center administrators, supervisors, and managers to configure users, resources (such as IVR), and applications based on their roles.
- **Support interfaces** – used by authorized contact center administrators to submit requests with Genesys Customer Care and to view service status and schedule.

## Agent Setup

Agent Setup is the Genesys Multicloud CX user management tool that provides support for customer administration of their contact center personnel resources. Among other capabilities, it includes support for:

- Agent & Skills management
- Bulk user provisioning (import and export of configuration data)
- Agent and supervisor workspace management and configuration
- Managing Caller ID for Outbound calls through the desktop
- Managing screen pop content
- Managing agent views
- Change control and audit

## Cloud Data Download Service (CDDS)

The Cloud Data Download Service allows Genesys Multicloud CX customers to export and download multiple types of data from a single user interface. Annual or scheduled exports can be configured by the user in the CDDS UI. The service currently supports data export from UCS.

## OS and Browser Support

Genesys Multicloud CX services support a selection of popular operating systems and web browsers. Details are maintained on the Genesys Multicloud CX documentation site.

## Telecom Architecture

User access to the service is the responsibility of the customer. The customer provides bandwidth and availability based on the minimum requirements provided by Genesys.

## Device Management

Enables a Genesys administrator to centrally manage and configure AudioCodes and Polycom SIP phones.

## Supported Hard Phones

Vendor	Phone Model	Firmware Version
AudioCodes	All 4xxHD Phones (420HD, 430HD, 440HD)	2.x (2.2.2+)
Genesys	420HD	2.x (2.2.2+)
Polycom	VVX IP Phones (VVX300, VVX400, VVX500, VVX600, etc.)	4.x, 5.x
Polycom	SoundPoint IP Phones (320, 335, 450, 550, 650, 670, etc.)	3.2.x, 4.0.x (v4.0.3.7562+)

## Supported Softphones

Soft Phone Vendor	Phone Model	Phone Version
Genesys	SIP Endpoint SDK	8, 8.1, 8.5
Genesys	Workspace SIP Endpoint	8, 8.1, 8.5
Genesys	Softphone	8.5, Genesys Softphone 9.0

# Genesys Multicloud CX data retention policy

## Contents

- [1 Definitions](#)
- [2 Policy](#)
- [3 Data retention period by solution category](#)
  - [3.1 Customer Engagement](#)
  - [3.2 Employee Engagement](#)
  - [3.3 Business Optimization](#)



Explains the Genesys Multicloud CX data retention policy.

### Definitions

- Data - Information that is stored in any form including on paper (typically referred to as hardcopy), or digital (often referred to as soft-copy or as electronically stored information). The term “data” includes, but is not limited to, databases, word documents, spreadsheets, PowerPoint presentations, electronic reporting systems, audio tapes, electronic tapes, backup tapes, optical discs, CD-ROMs, DVDs, email, voicemail, photographs, drawings, designs, or sketches.
- Genesys Multicloud CX Platform Data - Data that is stored, utilized, processed or transmitted through, in, or by the Genesys Multicloud CX Platform.
- Retention - The maintenance of data in a useable or recoverable format.
- Retention Period - The amount of time that data must be saved in a form that can be retrieved.
- Legal Hold - A process to preserve all forms of relevant information when litigation is reasonably anticipated. During the period of Legal Hold, normal document retention and destruction policies are suspended until the Legal Hold is lifted. Legal Hold notices are issued by Genesys Legal Department.
- Multicloud CX Innovation Edition - Provides customers with a non-production environment which is totally separate from their own production environment. This environment has all Genesys MCCX products, enabling them to easily innovate without touching production services.
- Multicloud CX Preview Edition - Provides a preview functionality which allows for software to be evaluated before it's deployed in production. This process enables customers to identify software issues for integration problems and/or bugs.

### Policy

- Clarification of Retention Period: if the default Retention Period for a certain type of Data is two (2) months, then Data created on March 20th will be retained until the end of May 20th after which point those records will be destroyed or overwritten.
- All customer Genesys Multicloud CX Platform Data will be purged upon contract termination with a 30-day grace period, whether or not the Data has reached its maximum retention period.
- All Data Retention Periods are subject to suspension if a Legal Hold notice is issued.
- If any part of the Data is subject to regulatory guidelines regarding its retention, then the regulatory- or legally-mandated data retention period shall apply.
- The following tables list the default and maximum Retention Periods by Solution Category. Unless otherwise specified by contractual agreement, Genesys will apply the specified default Retention Period to all Solution categories.

Data retention period by solution category  

Customer Engagement

			Default retention	Innovation/Preview retention	Max retention	Data usage	Options past retention period
Inbound	IVR	Call flow data	90 days	90 days	36 months	Real-time analysis & troubleshooting	Download available - GIM BI
	Voice routing and traffic	UCS contact profile	End of contract	90 days	End of contract	Customer contact data	N/A
	Post voice call survey	Response data	90 days	90 days	36 months	CX analysis	Download available - GIM BI
	Private and group voicemail	Message media	End of contract	90 days	End of contract	User-managed messaging	N/A
Digital	Email/chat	UCS interaction history (transcripts and so on)	90 days*	90 days	90 days*	Best practices	
Outbound	Voice	Campaign (calling) list	72 hours	72 hours	72 hours	List refresh	Download available
		Call results (detail records)	16 months	90 days	16 months	Success rate	Download available
Self service	Enterprise IVR	Call flow data	90 days	90 days	36 months	Real-time analysis & troubleshooting	Download available - GIM BI

\*Per interaction. All chained interactions (that is, email responses) are kept until 90 days past the last interaction.

Employee Engagement

			Default retention	Innovation/Preview retention	Max retention	Data usage	Options past retention period
WFO	GIR	Voice recordings	13 months*	90 days	End of contract*	Compliance & legal purposes	Download available

			Default retention	Innovation/ Preview retention	Max retention	Data usage	Options past retention period
	QM	Screen recordings	13 months*	90 days	End of contract*	Training and compliance	Download available
		QM evaluations	13 months	90 days	End of contract	Training	Download not available
		QM reports	90 days	90 days	36 months	Required for QM/ training purposes	Store up to 3 years
	WFM	Forecasting, scheduling, reporting, configuration, calendar	36 months	90 days	60 months	Workforce trends	Store up to 5 years
OmniChannel Desktop	Workspace	UCS interaction history (transcripts and so on)	90 days**	90 days	90 days**	Best practices	
		UCS contact profile	End of contract	90 days	End of Contract	Customer contact profile	N/A

\*Storage charges apply from Day 1 of storage.

\*\*Per interaction. All chained interactions (that is, email responses) are kept until 90 days past the last interaction.

## Business Optimization

			Default retention	Innovation/ Preview retention	Max retention	Data usage	Options past retention period
Analytics	Historical Reporting	GIM data (includes Designer Call Flow data)	13 months	90 days	36 months	Trending and performance analysis	Download available - GIM BI
Platform	Designer	Analytics (Elastic Search)	90 days	90 days	36 months	Short-term analysis & call flow tuning	Download available - GIM BI

# Wireless out-of-band management

Explains the Genesys Multicloud CX wireless out-of-band management restrictions associated with the use of wireless devices in Genesys data centers.

Where available\*, Genesys will permit customers to use wireless devices in Genesys data centers to provide out-of-band management of their equipment used to access the Genesys Multicloud CX service infrastructure subject to the following restrictions:

- Customers' wireless devices shall not be part of the Genesys Multicloud CX environment and placement of wireless devices will not be permitted in the Genesys Multicloud CX environment;
- Wireless devices, including antennas, must be located in rack space that Genesys designates for use solely by customers;
- Customer must lease rack space from Genesys pursuant to a Services Order;
- Customer is responsible for ensuring that it leases enough rack space to accommodate antennas for the wireless devices;
- Customers are responsible for procuring wireless services, including the determination as to whether such services are sufficient to meet customers' requirements;
- Customers are responsible for management and maintenance of the wireless devices;
- If a customer requires changes to wireless devices that necessitates any changes to the wireless equipment, Genesys shall charge customer for such support on a time and materials basis;
- If a customer requires access to its wireless devices in the data center, such access shall be subject to Genesys' policy, including but not limited to the requirement that customer personnel be escorted by Genesys or a Genesys representative;
- Genesys reserves the right to impose additional reasonable requirements and/or fees based on customers' use of wireless devices; and
- Genesys shall have no liability to customers with respect to the use of wireless devices for out-of-band management, including any outages or equipment failures affecting the wireless devices and/or customers' ability to remotely manage their equipment.

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\* Applicable to Genesys CX on AWS only.

# Support

Describes the support documentation for Genesys Multicloud CX services.

Please refer to the Genesys Multicloud CX Customer Care Support Guide. Note that from time to time the service itself may include certain communications from Genesys such as service announcements, administrative messages, and notices. To that end, the customer acknowledges and agrees that such communications are considered part of the service, and the customer will not be able to opt out of receiving them.

# Genesys Multicloud CX billing measurement definitions

## Contents

- [1 Billing measurement definitions](#)

Provides Genesys Multicloud CX billing measurement definitions

Billing measurement definitions  

Download the spreadsheet, available [here](#). The spreadsheet defines the measurements used in all Genesys Multicloud CX offers, including Private Edition, to determine consumption for billing purposes.

Genesys Multicloud CX billing measurement definitions

# Accessibility

## Contents

- [1 Overview](#)
- [2 VPAT](#)



Provides information on Genesys support for standards to make software accessible to people with disabilities.

This topic provides information on Genesys VPAT®

## Overview

Genesys values diversity as a core principle. As part of this, Genesys seeks to remove obstacles for individuals with disabilities to be able to successfully use its software. Genesys follows best-practices and guidelines towards this goal.

The internationally recognized W3C Web Content Accessibility Guidelines (WCAG) 2.1 cover a wide range of recommendations for making Web content more accessible. By following these guidelines, Genesys makes content more accessible to a wider range of people with disabilities and often makes Web content more usable to users in general. WCAG relies on four guiding principles for building accessible UIs, as follows:

- **Perceivable:** Information and user interface components must be presentable to users in ways they can perceive.
- **Operable:** User interface components and navigation must be operable.
- **Understandable:** Information and the operation of user interface must be understandable.
- **Robust:** Content must be robust enough that it can be interpreted by a wide variety of user agents, including assistive technologies.

Genesys provides Voluntary Product Accessibility Template® - VPAT® reports to document conformance of Genesys applications to WCAG 2.0 and WCAG 2.1 specifications. The VPAT® report is a standardized template for documenting conformance to various accessibility specifications. The VPAT® report provided by Genesys follows the W3C/WAI's WCAG 2.0 and WCAG 2.1 specifications, as this is an international standard adopted and recognized by Genesys customers worldwide. Available Genesys VPAT® reports can be found in the table in the VPAT section below.

### Important

Please note that Genesys is continually extending accessibility capabilities in Genesys Cloud. For more information please see the article on accessibility in Genesys Cloud.

## VPAT

The following table provides information on Genesys VPAT®:

<b>Products</b>	<b>Role</b>	<b>WCAG 2.1 Level A</b>
<b>Widgets</b>	Consumer	Achieved
<b>Portal</b>	All employees	Achieved
<b>Workspace Web</b>	Agent (+supervisor features)	Achieved
<b>Workspace Desktop (Premise)</b>	Agent	Achieved (with limitations)
<b>WFM Web Agent</b>	Agent	Achieved (with limitations)
<b>Pulse</b>	Supervisor	Achieved

**Note:** When using softphone, it is recommended to use in Connector Mode, which allows agents to control the softphone from their Workspace application.