GENESYS™

Genesys Predictive Routing Help

View the Customer Profile schema

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Contents

View the fields, datatypes, anonymization status and other aspects of the Customer schema.

Related documentation:

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> **WARNING:** Although the Predictive Routing web application includes data upload functionality, its use is deprecated in favor of data uploads using Data Loader. If you upload from the GPR web application, note that using both Data Loader and the UI to upload data creates conflicts and presents a high risk of data corruption.

View the schema

After Data Loader uploads the Customer Profile, you can use the GPR web application to view the schema.

1. Click the **Settings** gear icon ⌄ ⚙ ?, located on the right side of the top menu bar, to open the **Settings** menu (appears on the left side of the window).

2. Click the **Customer Profile** tab to open the Customer Profile window.

NOTE: Making changes on this page to a schema uploaded using Data Loader will cause a mismatch and prevent any subsequent updates using Data Loader.

All of the columns in your schema are listed and include the following information:

- **Label** and **Type** - The *Label* is the name of the column in the Customer Profile and the *Type* is the datatype for that field.

- The field specified as the **ID Field** field is marked with a dot in the radio button for that row.

- **Visible** - *Visible* fields appear in the display on the **Customers** tab (accessed from the top navigation bar).

- **Indexed** - *Indexing* speeds access to values in the indexed field. You can have up to five (5) indexed fields.

    - The ID field is always indexed by default.

- **Cardinality** - The number of unique values that occur in that column. If there are more than 1000, this field shows the value as **1000+**. Click the cardinality value to open a pop-up window that displays the first 1000 unique values that occur in the field.

- **Expression** - If you created a custom field using an expression, the expression you used is shown in this column.

- **PII** - A mark in this column indicates that the fields was configured to be anonymized upon upload. PII fields contain sensitive data or personally identifiable information.

You can sort the table by clicking any column header.

Update Profile data

NOTE: Although the GPR application presents buttons labeled **Upload Data** and **Add New Field**, this functionality is deprecated. Changes to the data made in the GPR web application cause a mismatch between the schema configuration in the Data Loader `Application` object and the data presented in the GPR web application.

To *update* data in the Customer Profile schema, create a CSV file containing the new data—but using the same schema—and upload it using Data Loader.

If you need to *change* the schema for the Customer Profile, use the following procedure:

NOTE: Execute this procedure while the Predictive Routing is turned off or when the inbound call volume through GPR is low, to reduce impact on the scoring results.

1. Open the **[dataset-customers]** section in the Data Loader `Application` object from GAX or any other Genesys configuration manager application.

2. Set the **upload-dataset** option value to `false`.

3. From the GPR web application, open the Customer Profile from the **Settings** menu.

4. Delete the Profile by clicking the trashcan icon next to the Customer Profile heading.

5. In the Data Loader `Application` object, change the values in the **[dataset-customers]** and **[schema-customers]** sections as desired.

6. Set the **upload-dataset** option in the **[dataset-customers]** section to `true`.

After Data Loader uploads the new Customer Profile, you can check the schema from the GPR web application.