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Callback Administrator's Guide

Getting started with Callback

Contents

- [1 What is a callback?](#)
- [2 Getting started with Genesys Callback](#)
 - [2.1 Create and manage Callback resources](#)
 - [2.2 Provision Callback](#)
 - [2.3 Start using the Callback UI](#)
- [3 Overview of the Callback UI](#)
- [4 Callback reports](#)
- [5 Specifying your language preference](#)



- Administrator

Genesys Callback, available from the Genesys portal, provides traditional callback services, user-originated Click-To-Call scenarios, and supports the integration of Push Notifications and CAPTCHA widgets. This article includes information about where to begin if you are new to Callback and what steps are required to get started using the Callback UI.

Related documentation:

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Businesses sometimes cannot offer on-demand, low-wait agent help because of resource limitations or increased service usage. In these situations, the best option is to offer some form of deferred service that can connect consumers and agents at a later, mutually-beneficial time.

Genesys Callback, which takes its name from the most typical form of deferred agent voice connection, supports a user-originated call-in feature, in addition to a range of scenario and sourcing options. In short, Genesys Callback is much more than callback functionality.

Genesys Callback is enabled by Genesys Engagement Services (GES) behind-the-scenes and you might see references to GES or "Engagement Services" throughout Callback pages or within resource names.

What is a callback?

A callback is a data record that contains data for calling a customer at some time in the future. Callbacks generally consist of attached data and configuration data. Attached data is specific to the end customer and might be used in screen pops, routing, reporting, and other applications. Configuration data describes how a callback is fulfilled; this includes target expressions, timeout values, and virtual queue names.

Using Callback, you can associate a callback service with a phone number, which enables a caller to request a callback. Depending on which scenario you choose to implement, the callback is then routed to an agent who processes the call.

Getting started with Genesys Callback

Before you start working in the Callback UI, you need to provision resources, access permissions, Designer applications for callbacks, and configure the callback services. This section provides information about where to start. For additional information, also see Providing callback services with Callback.

Create and manage Callback resources

Use Platform Administration and Agent Setup to create and manage contact center resources and user access to information and features in the Callback UI. In Platform Administration, you create the virtual queues that will be used for callbacks. The queues are then configured in Designer for Callback use.

To get started, go to the Provisioning Callback page. The page tells you what contact center resources you'll need to provision in Platform Administration or Agent Setup. For general information about configuring agents, including how to assign skills to each agent, see [Create and manage agent skills and Manage agents and other users](#). For information about creating virtual queues, see [Virtual Queues](#).

After the resources are provisioned, you can configure user access permissions for Callback. Genesys provides predefined roles for Callback to ensure that your users have UI access permissions that are appropriate for your business needs. If you are new to Genesys Callback, then you might have to assign resources (users) to appropriate access groups. In addition, you have the option to restrict access to queues (and lists of callbacks) in the Callback UI based on your lines of business. Read [Overview of the Callback UI](#) to understand which roles are required for access to each tab in the Callback UI. For detailed information about Callback-specific roles and access groups, see [Controlling User Access](#).

Provision Callback

You use Designer to provision callback-related applications and virtual queues. Callback works with Designer to do such things as route calls, connect consumers to agents with the correct skills, time out and purge expired or abandoned callbacks, determine if a callback is possible based on a contact center's office hours, and terminate callbacks when appropriate. The Provisioning Callback in Designer page guides you through the Designer application provisioning process, including how to determine which type of Designer applications you require for your callback scenario.

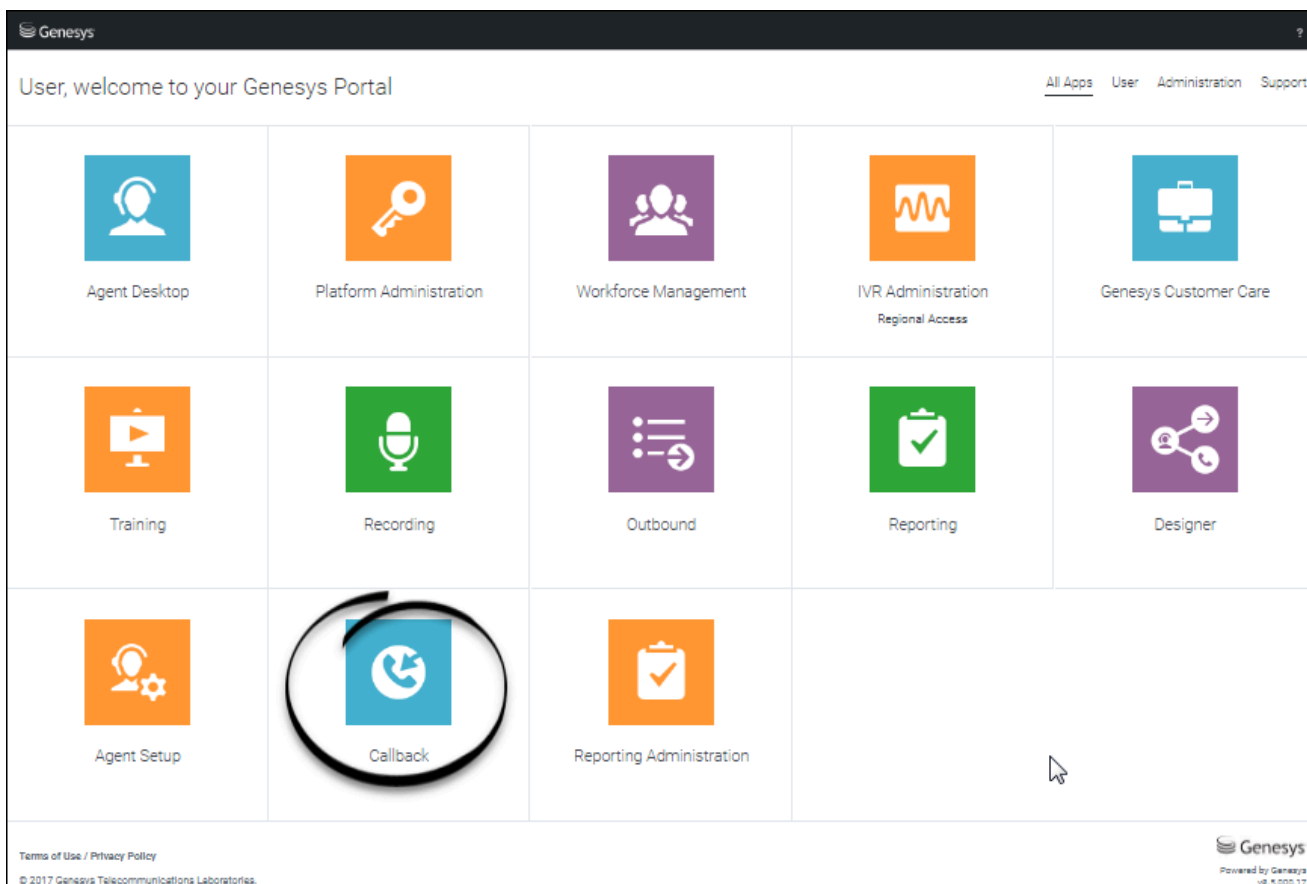
Start using the Callback UI

After you have completed Callback provisioning and testing to ensure that calls are routed correctly, and Callback users have been assigned to the correct roles and access groups, you can begin to use the Callback UI. The **Callback** tab displays the list of callback records. Users with sufficient permissions use the **Callback** tab to manage the callback records, including creating, editing, or cancelling callbacks.

Callback Administrators and Developers have access to a **Developer** tab in the Callback UI. Use the **Developer** tab to manage callback activity and features at a more technical level. For example, you can check for errors in Callback API queries or validate API keys. To learn more about the tools on the **Developer** tab, see [Troubleshooting and validating functionality](#).

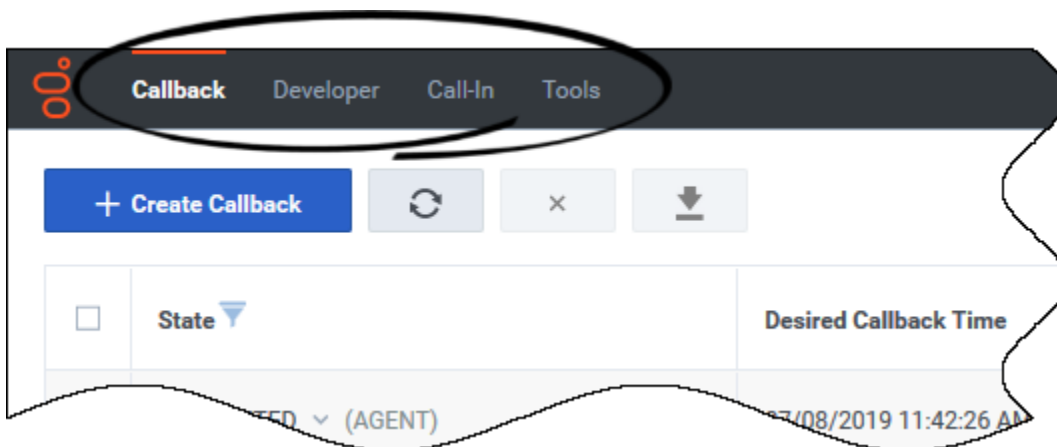
If you work with GES/Callback REST APIs, you can find links to tutorials and additional information on the [Genesys Multicloud CX REST APIs and Tutorials for Callback](#) page in the Callback documentation.

Overview of the Callback UI



Click the **Callback** icon on the Genesys Portal to open the UI. The Callback UI is supported in the following browsers:

- Firefox
- Google Chrome
- Microsoft EdgeHTML version 16.0 and up and on Chromium-based Edge



The Callback UI has multiple tabs; you might see all available tabs or only some of the tabs. Administrators will make sure that you have access to the tab or tabs that you need to do your job. Access is based on the role to which you have been assigned.

By default, your Callback UI session times out after 20 minutes of inactivity.

The following tabs are available in the Callback UI:

- **Callback:** Displays the list of callbacks. In some scenarios, you might need to create or monitor a callback request, or even cancel a set of callbacks. Callback Monitor is the minimum role required to access the **Callback** tab. To modify callback records, you require the Callback Administrator or Callback Supervisor role.
- **Developer:** You must be a member of the Callback Administrator or Callback Developer role to access the **Developer** tab. From the **Developer** tab, you can access developers' tools such as the list of errors related to your Callback API queries as well as pages on which you can validate your API keys or provision Push Notifications.
- **Call-In:** You must be a member of the Callback Administrator or Callback Developer role to access the **Call-In** tab. If you have the Click-To-Call-In scenario provisioned, use the **Call-In** tab to view the Click-To-Call-In records.
- **Tools:** You must be a member of the Callback Administrator, Callback Supervisor, or Callback Developer role to access the **Tools** tab. The **Tools** tab offers additional views and tools to assist with callback management, configuration, and troubleshooting. For example, you can search for a specific interaction within the callback records or check the EWT on a specific callback queue.

Callback reports

For information about real-time reporting for callbacks, see Real-time Reporting with Pulse. Callback activity is tracked as part of the queue reports. You can add a report widget that is based on the Callback Activity template to your Pulse dashboard.

For information about Callback historical reporting using Genesys Customer Experience Insights (GCXI), see Callback reports, Callback Details Report, and Callback Summary Report in Work with Genesys CX Insights Reports.