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Callback Administrator's Guide

[Managing callbacks](#)

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- Administrator

The **Callback** tab in the Callback UI displays the list of callback records. If you have sufficient user privileges, you can create, recreate, schedule, edit or cancel callbacks on this tab. Use the **Advanced Options** dialog to customize the display of data.

Related documentation:

-

Callback Monitor is the minimum role required to access the **Callback** tab.

The **Callback** tab in the Callback application displays the list of callbacks in pages of 250 items. Depending on your time filter selection, you might continue to see a callback record on the **Callback** tab after the **Desired Callback Time has passed**.

Additional tabs and dialogs might display, depending on the permissions associated with your Role.

You might see the term *service* or *service name* in callback-related applications, Widgets, APIs, and in the Callback UI. A service, in this context, is a virtual queue. The service name, therefore, refers to the name of the virtual queue. For example, on the **Callback** page in the UI, the **Service Name** column identifies, by name, the virtual queue associated with each callback.

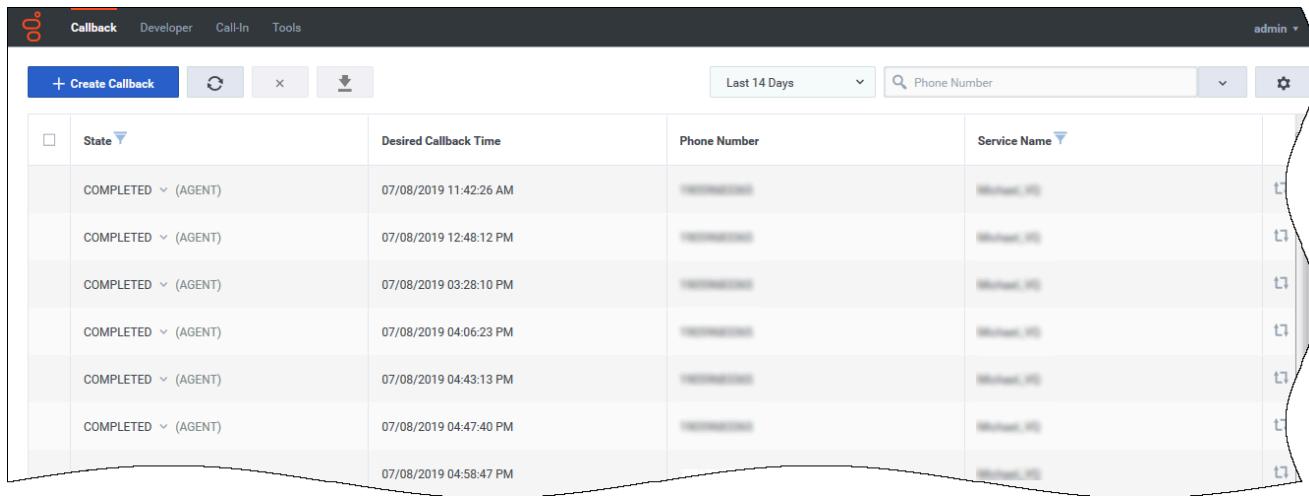
Important

Genesys Callback supports voice calls only. Digital interactions are not supported.

Important

Callback records are stored for 14 days. The 14-day TTL setting starts at the Desired Callback Time. The Callback TTL (seconds) setting in the CALLBACK_SETTINGS data table has no effect on callback record storage duration; 14 days is a fixed value for all callback records.

Callback states

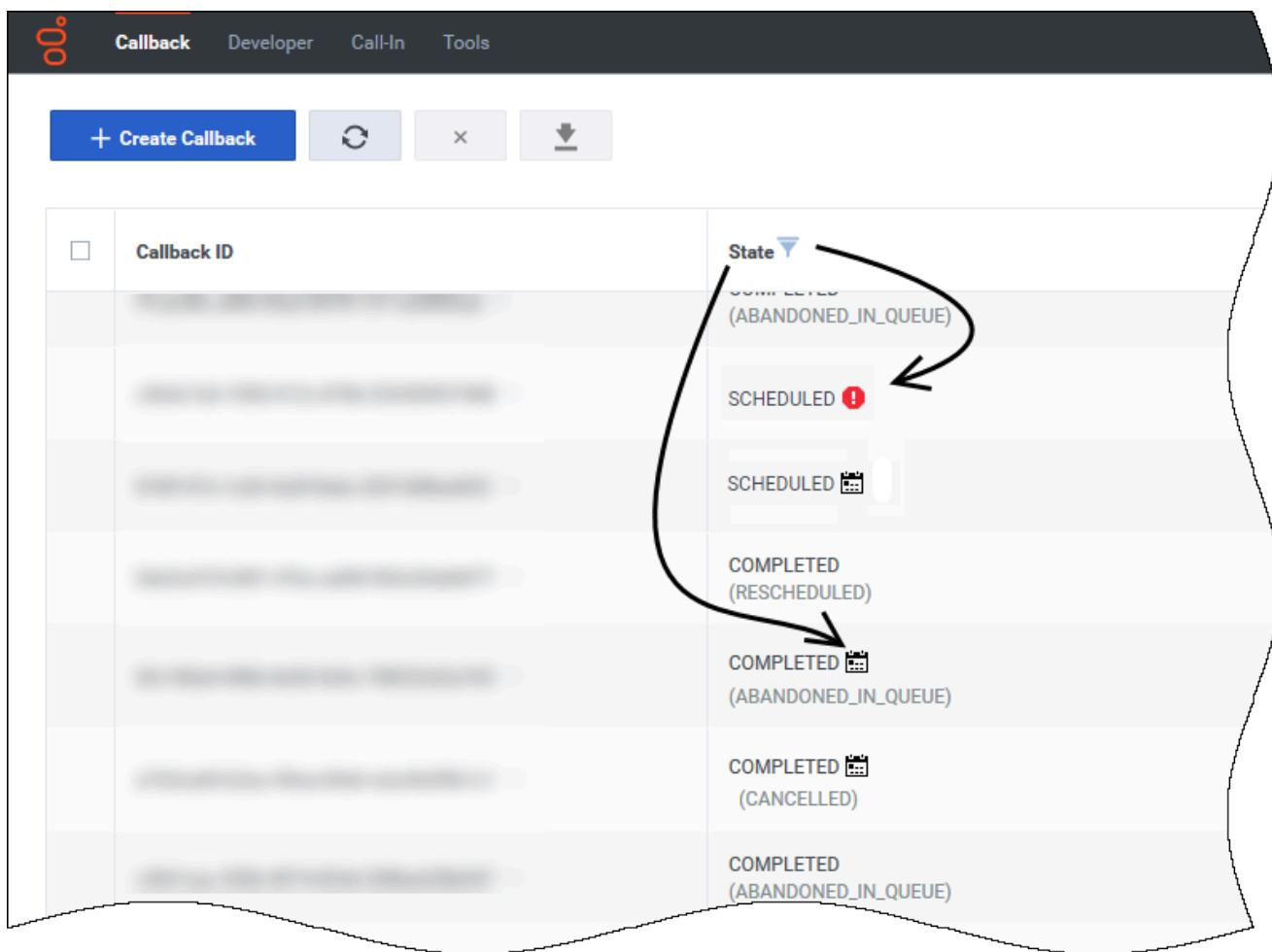


The screenshot shows a table of callback records. The columns are: State, Desired Callback Time, Phone Number, and Service Name. There are six rows, each representing a completed callback. The 'State' column shows 'COMPLETED' followed by '(AGENT)' and a small downward arrow. The 'Desired Callback Time' column shows various times on July 8, 2019. The 'Phone Number' and 'Service Name' columns show redacted data. Each row has a small edit icon in the last column.

<input type="checkbox"/>	State	Desired Callback Time	Phone Number	Service Name	
	COMPLETED (AGENT)	07/08/2019 11:42:26 AM	██████████	██████████	████
	COMPLETED (AGENT)	07/08/2019 12:48:12 PM	██████████	██████████	████
	COMPLETED (AGENT)	07/08/2019 03:28:10 PM	██████████	██████████	████
	COMPLETED (AGENT)	07/08/2019 04:06:23 PM	██████████	██████████	████
	COMPLETED (AGENT)	07/08/2019 04:43:13 PM	██████████	██████████	████
	COMPLETED (AGENT)	07/08/2019 04:47:40 PM	██████████	██████████	████
		07/08/2019 04:58:47 PM			

Callback records can have the following states:

- **SCHEDULED**—The callback-management system is handling the request (there are no sessions started in the system). While in this state, the request is available on the **Callback** tab as long as the specified Desired Callback Time is upcoming.
- **QUEUED**—Callbacks actively waiting for an agent in ORS/URS; the agent is not assigned yet.
- **ROUTING**—An agent is reserved but the call is not yet routed to the agent.
- **PROCESSING**—The assigned agent is handling the callback. You cannot cancel a callback when it is in the PROCESSING state.
- **COMPLETED**—The callback was completed. The COMPLETED status can include a result or reason for the callback completion. For example, a result can indicate that the callback was completed by an agent or was cancelled by an administrator. The result displays beside COMPLETED in the **State** column of the table.



The screenshot shows a table with a header 'Callback ID' and a 'State' column. The 'State' column contains the following data points, each with a black arrow pointing to it from the text above:

- SCHEDULED !
- SCHEDULED
- COMPLETED (RESCHEDULED)
- COMPLETED (ABANDONED_IN_QUEUE)
- COMPLETED (CANCELLED)
- COMPLETED (ABANDONED_IN_QUEUE)

The **Desired Callback Time** is not a precise moment in time, but rather a short time increment – by default, two minutes – that begins at the time identified in the column. When a callback in the SCHEDULED state remains in that state past the **Desired Callback Time** time interval, a warning icon displays to alert you. Hovering your cursor over the icon displays the warning message.

A calendar icon displays beside callbacks that originated as scheduled callbacks. If there is no icon associated with a callback's state, then the callback was initiated as an Immediate callback.

Callback administration overview

The screenshot shows the 'Callback' tab in a software interface. At the top, there are tabs for 'Callback', 'Developer', 'Call-In', and 'Tools', with 'admin' selected. Below the tabs is a toolbar with buttons for '+ Create Callback', refresh, close, and download. A date range selector dropdown is set to 'Last 14 Days'. A search bar for 'Phone Number' is also present. The main area is a table with columns: 'State', 'Desired Callback Time', 'Phone Number', and 'Service Name'. The table lists completed callbacks with various dates and times. Annotations include a callout pointing to the refresh button with the text 'Refresh the callback list' and another pointing to the date range selector with the text 'Select the date range for which you want to view callbacks'.

The **Callback** tab includes the following features:

- Refresh—You can force the interface to refresh the list of callbacks.
- Date range selector—The date range drop-down menu lets you filter the list of callback records based on a specific (pre-defined) period of time. In the Advanced Options window, you can add your own custom date range to the drop-down menu.

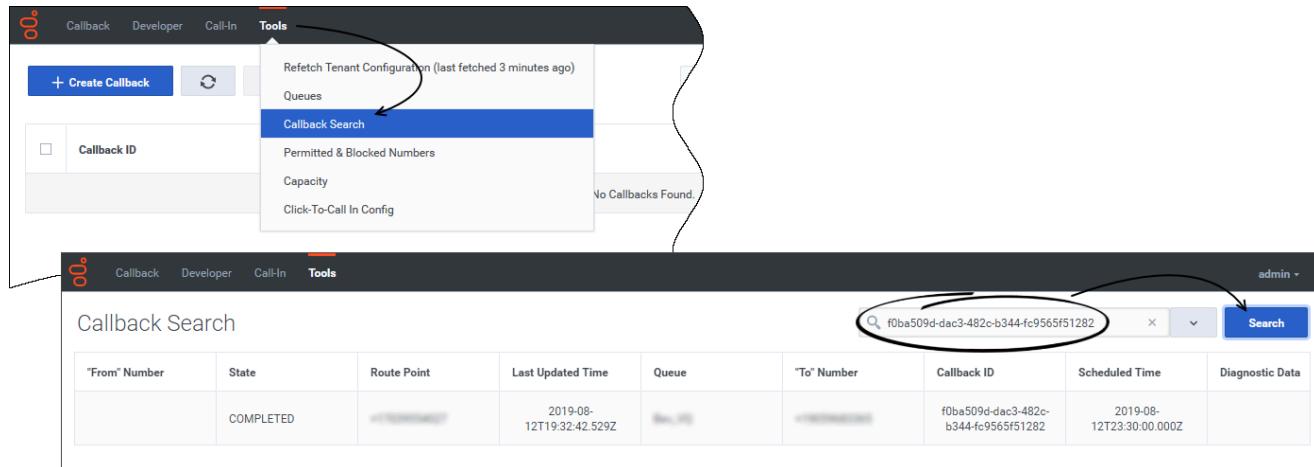
The screenshot shows the 'Callback' tab interface with annotations. A callout points to the date range selector with the text 'Select the filtering option from the drop-down'. Another callout points to the search bar with the text 'Enter the property that you are searching for'. The search bar contains '15065555555'. A callout points to a dropdown menu on the right with the text 'Phone Number' highlighted. The main table shows completed callbacks with their details. Annotations include a callout pointing to the search bar with the text 'Enter the property that you are searching for' and another pointing to the dropdown menu with the text 'Phone Number' highlighted.

- Search box—You can select a column field in the drop-down at the right of the Search box. The interface then filters the results dynamically as you type.

The screenshot shows the 'Callback' tab interface with annotations. A callout points to the date range selector with the text 'Check your time filter'. The search bar contains '15065555555'. The main table shows completed callbacks with their details. Annotations include a callout pointing to the date range selector with the text 'Check your time filter' and another pointing to the search bar with the text '15065555555' highlighted.

If you do not see your callback after you successfully create it, make sure that your time filters are correct. For example, if you scheduled a callback to occur in two days, it does not show up if the **Last 30 Days** label is selected. Switch to **Next 7 Days**, or something similar, to view it.

Searching for a specific interaction



The screenshot shows the 'Callback' interface with the 'Tools' menu open. The 'Tools' menu includes options like 'Refresh Tenant Configuration', 'Queues', and 'Callback Search'. The 'Callback Search' option is highlighted. Below the menu, a search bar contains the text 'f0ba509d-dac3-482c-b344-fc9565f51282'. A 'Search' button is to the right of the search bar. Below the search bar is a table with the following data:

"From" Number	State	Route Point	Last Updated Time	Queue	"To" Number	Callback ID	Scheduled Time	Diagnostic Data
	COMPLETED	[REDACTED]	2019-08-12T19:32:42.529Z	[REDACTED]	[REDACTED]	f0ba509d-dac3-482c-b344-fc9565f51282	2019-08-12T23:30:00.000Z	

To quickly find a specific callback interaction, use the **Tools > Callback Search** menu option. To search for an interaction, enter either the callback ID or the customer's phone number and click **Search**.

Metrics

On the **Callback** tab, you have access to diagnostic data or *metrics* for each callback record. The metrics that are available for a callback depend on the callback's state. As the state of the callback progresses, more data becomes available, which means that additional metrics become available as well.

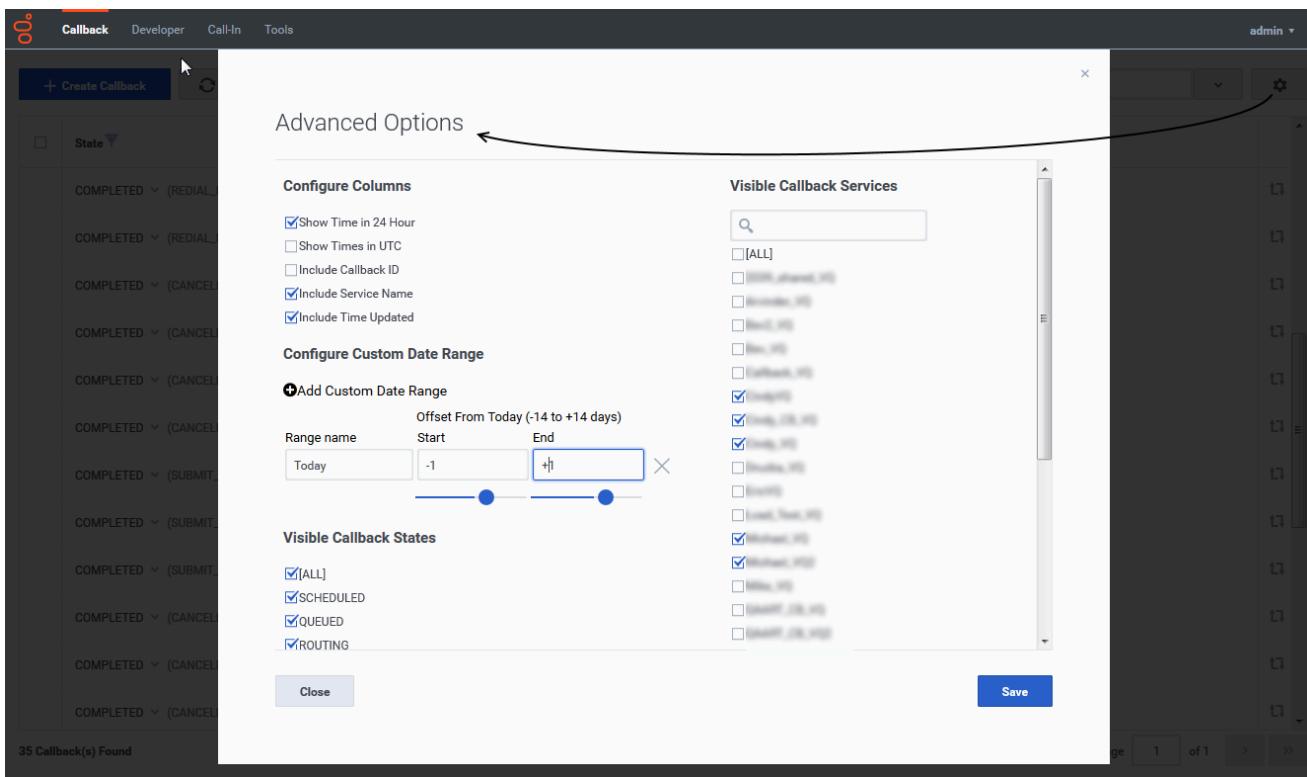
To view the metrics for a callback, click the arrow beside the record. Callback provides some basic information below the callback record (Position in Queue and Estimated Wait Time).

To view all metrics for the callback, click the Advanced Callback Metrics toggle. For example, you might want to know who cancelled a particular callback. That information is available in the list of advanced metrics.

Tip

The username of the person who created, cancelled, rescheduled, or recreated a callback is captured only when the action is performed in the Callback UI.

Advanced options



Advanced Options—Opens a dialog in which you can customize how the **Callback** tab displays data:

- **Configure Columns**—Select display properties for columns.
 - **Show Time in 24 Hour**—Show all times in 24-hour time rather than AM/PM format.
 - **Show Times in UTC**—Show all times in the table in UTC time rather than local time.
- **Configure Custom Date Range**—Add a time range filter.
- Filter the display of callbacks by **States** and **Services**—To filter the list of callbacks that display on the **Callback** tab, you can select specific callback states and virtual queues (services). To view callbacks in any state, select ALL in the **Visible Callback States** list. Similarly, to view callbacks from every virtual queue, select ALL in the **Visible Callback Services** list.

Create or schedule a callback

The screenshot shows the 'Callback' tab in a software interface. A modal dialog box titled 'Add New Callback' is open in the center. The dialog contains fields for 'Callback Type' (set to 'Scheduled'), 'Service Type' (set to '2000_automated'), 'Customer Number' (set to '15065555555'), 'Desired Date' (set to '07/25/2019'), and 'Available Time Slot' (set to '07/25/2019 01:45:00 PM'). At the bottom are 'Cancel' and 'Create Callback' buttons. In the background, a table lists 35 callbacks, all in the 'COMPLETED' state. The 'Create Callback' button in the top-left corner of the main interface is highlighted with a red arrow pointing to it.

Important

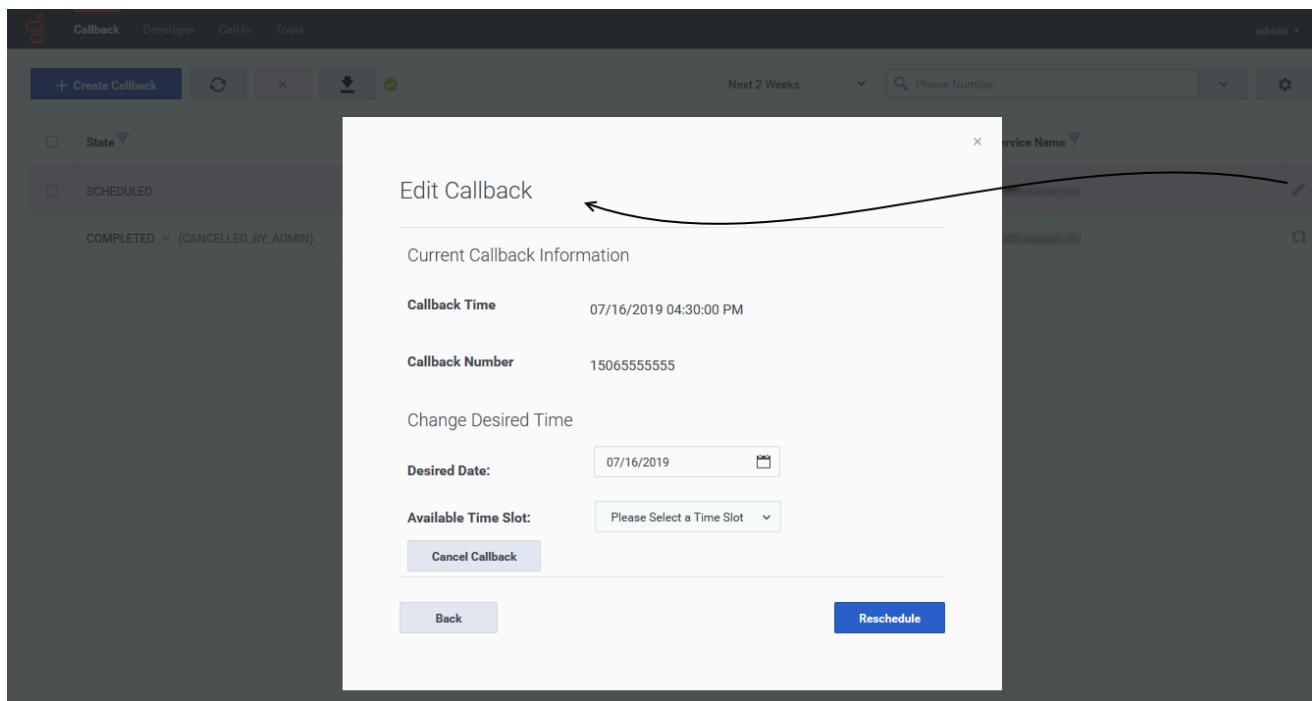
This feature requires the **Callback Administrator** or **Callback Supervisor** role.

Click **Create Callback** to submit or schedule a callback request. A new dialog opens. Select the **Callback Type** (Immediate or Scheduled), then a **Service Type** (the name of the virtual queue provisioned in Designer), and enter the number to call in the **Customer Number** field. For Scheduled callbacks, select a date and time for the call.

Tip

If you provision a virtual queue for callbacks in Designer while you are logged in to the Callback UI, be aware that the new queue will not be available for use in the Callback UI until you log out and log in again because Callback fetches virtual queue permissions data only at login. In other words, Callback determines which virtual queues you have access to when you are logging in, and only then.

Edit a callback



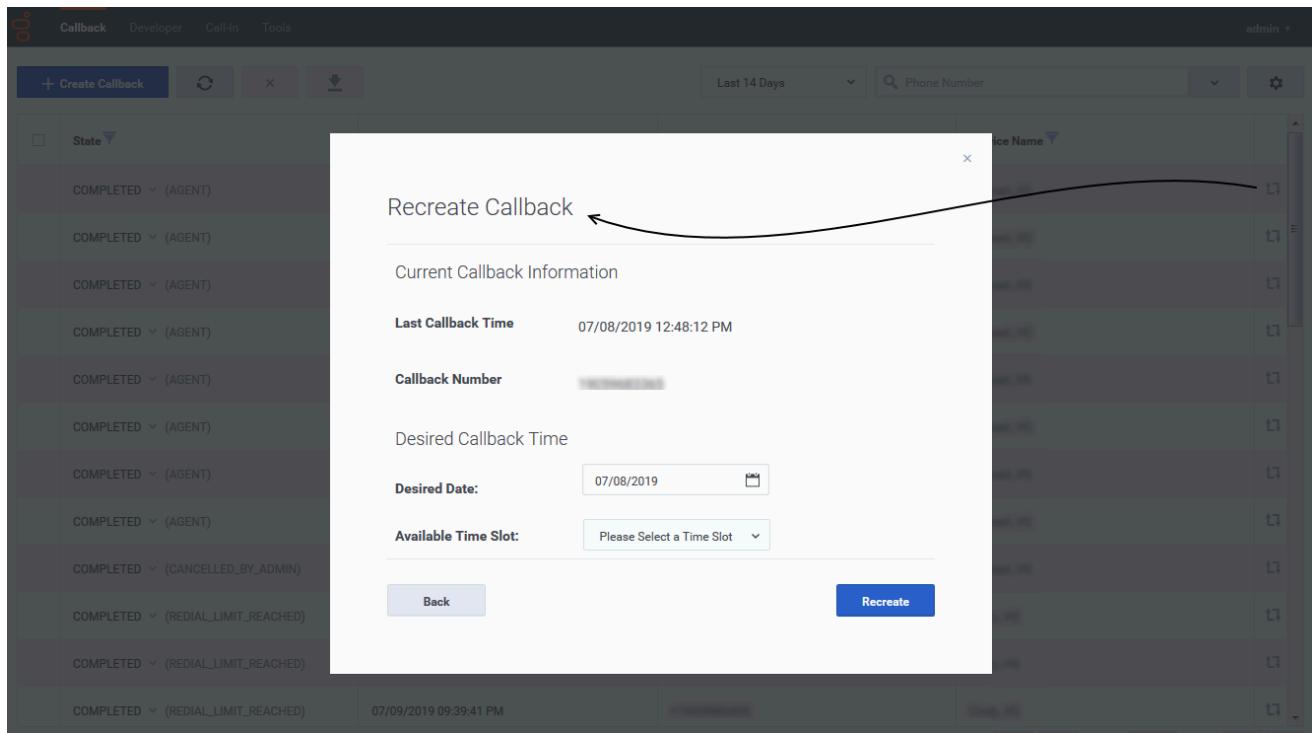
Important

This feature requires the **Callback Administrator** or **Callback Supervisor** role.

In the Callback table, for Callbacks that can be edited, a blue pencil displays in the last column. Clicking this pencil displays the edit options for that Callback.

- You can choose to reschedule the Callback (only for SCHEDULED Callbacks).
- You can choose to cancel the Callback.

Recreate a callback



Important

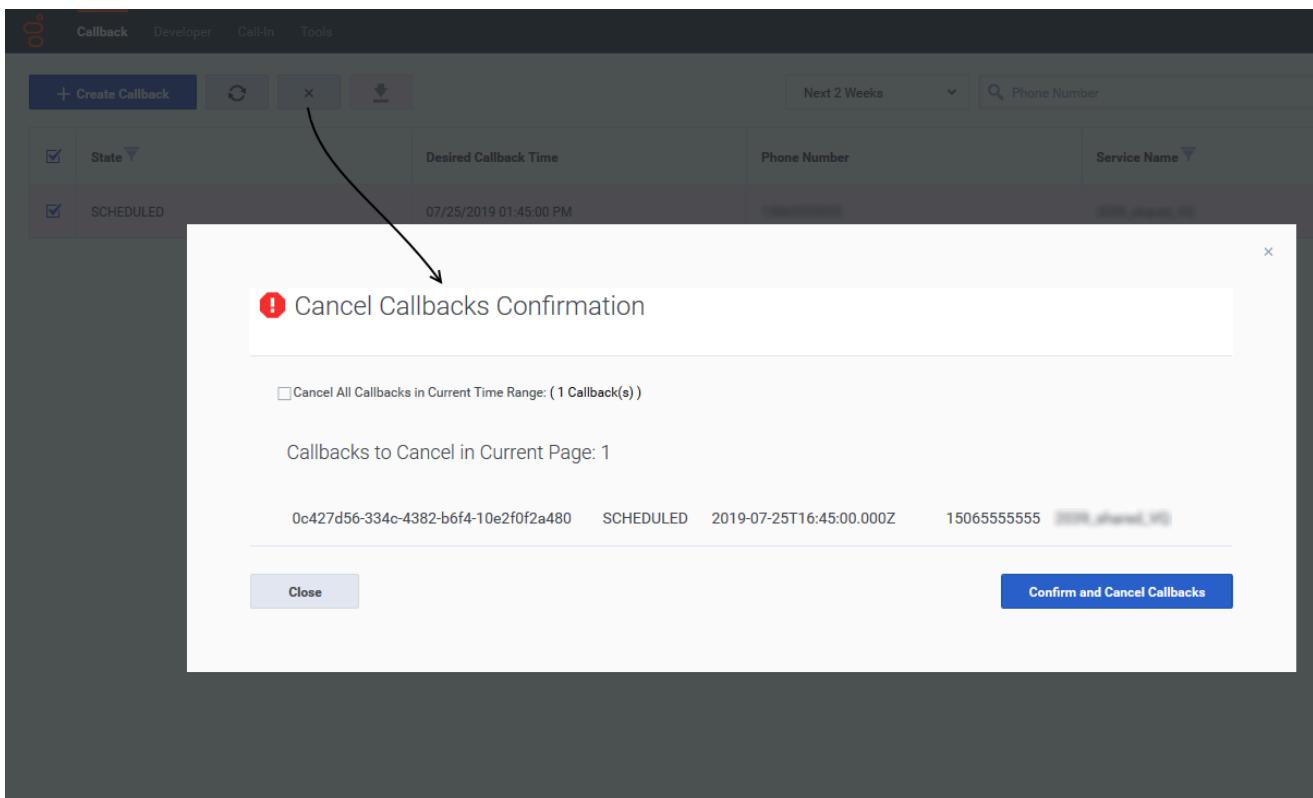
This feature requires the **Callback Administrator** or **Callback Supervisor** role.

For completed callbacks which can be recreated, the  icon displays in the last column of the table. Click the icon to open the **Recreate Callback** dialog for that callback.

Important

Name recordings will be preserved if a callback is rescheduled within four days of the completion of the original callback.

Bulk cancel and export of callback records



Important

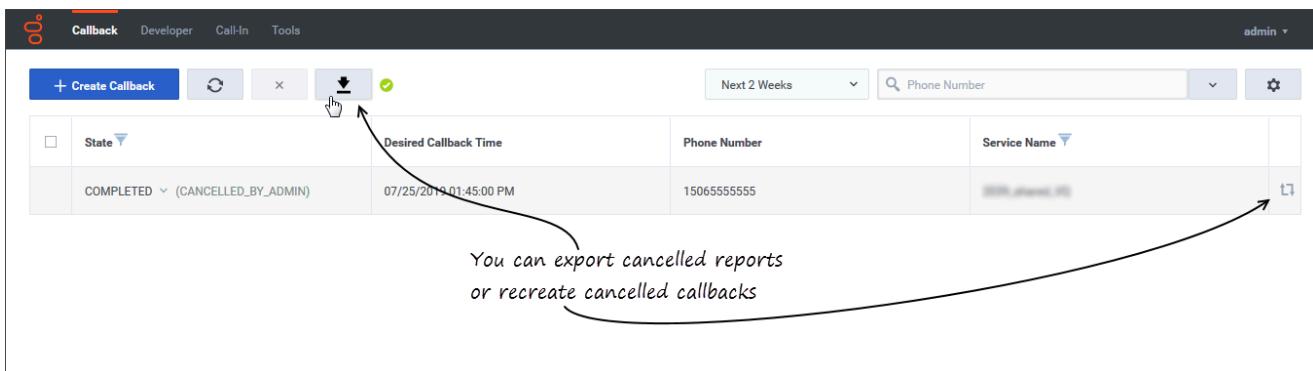
This feature requires the **Callback Administrator** or **Callback Supervisor** role.

Make sure to select an appropriate Time Range to filter callbacks, then make a callback selection to activate the **Cancel Callbacks** button. When you click this button, the **Cancel Callbacks Confirmation** dialog opens, displaying the selected callback cancellations.

You can either:

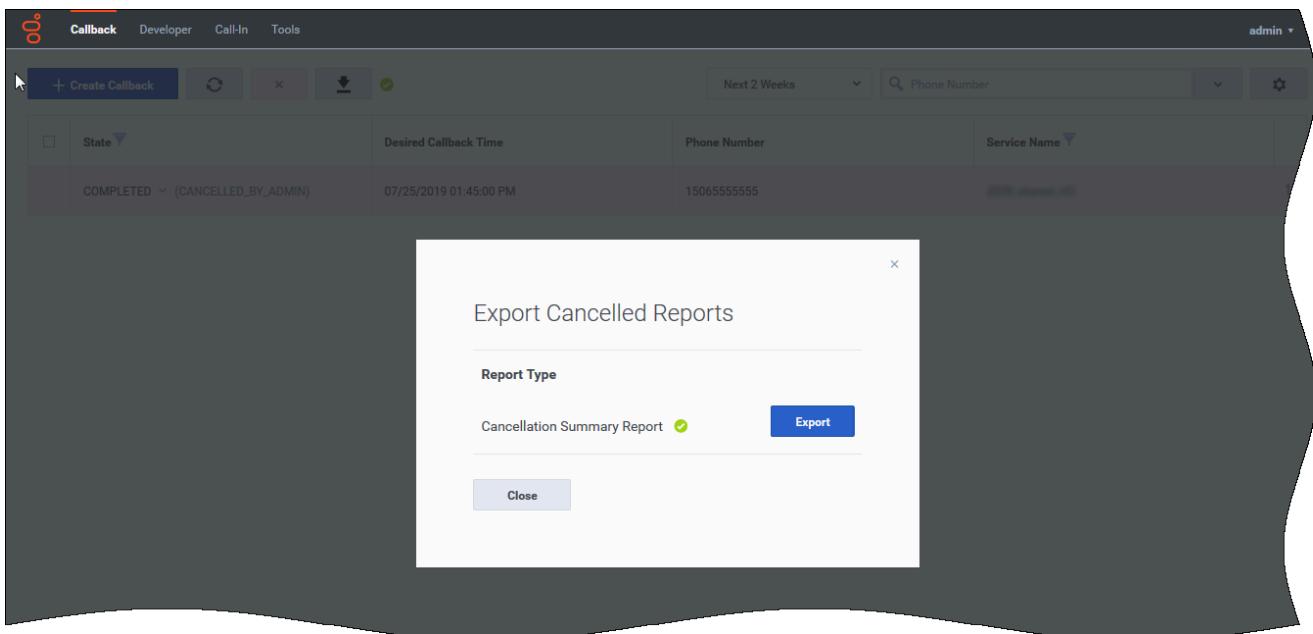
- Continue with the selections you have made and click **Confirm** to cancel them, or
- Check **Cancel All Callbacks In Current Time Range** to override your previous callback selections and delete all callbacks in the current time range. If you select this option, the list of displayed callbacks disappears from the dialog. Callbacks that are in the PROCESSING state cannot be cancelled. If there are any callbacks in this state within the selected time range, they are excluded in the **Cancel Callbacks Confirmation** dialog box and are not cancelled.

Click **Confirm** to cancel the records.



The screenshot shows the 'Callback' application interface. At the top, there are navigation links: 'Callback', 'Developer', 'Call-In', and 'Tools'. On the far right, it says 'admin'. Below the navigation is a toolbar with buttons: '+ Create Callback', 'refresh', 'close', a download icon with a green checkmark, and a settings gear icon. To the right of the toolbar are filters: 'Next 2 Weeks', a search bar for 'Phone Number', and a settings gear icon. The main area is a table with columns: 'State', 'Desired Callback Time', 'Phone Number', and 'Service Name'. A row in the table shows 'COMPLETED (CANCELLED_BY_ADMIN)' in the 'State' column, '07/25/2019 01:45:00 PM' in the 'Desired Callback Time' column, '15065555555' in the 'Phone Number' column, and '0000000000' in the 'Service Name' column. A tooltip with a curved arrow points to the download icon in the toolbar, containing the text: 'You can export cancelled reports or recreate cancelled callbacks'.

The resulting display shows all the callbacks that you have cancelled and that are now in the COMPLETED (CANCELLED_BY_ADMIN) state.



The screenshot shows the 'Callback' application interface with a modal dialog titled 'Export Cancelled Reports' overlaid. The dialog has a 'Report Type' section with a radio button for 'Cancellation Summary Report' (which is selected) and an 'Export' button. There is also a 'Close' button at the bottom left of the dialog. The background of the application shows a table with a single row: 'COMPLETED (CANCELLED_BY_ADMIN)' in the 'State' column, '07/25/2019 01:45:00 PM' in the 'Desired Callback Time' column, '15065555555' in the 'Phone Number' column, and '0000000000' in the 'Service Name' column.

The **Export Cancelled Reports** dialog provides the **Cancellation Summary Report** file only when you have recently cancelled some callbacks. This report shows the cancellation status of the recently-cancelled callbacks.