GENESYS™

Callback Administrator's Guide

Managing callbacks

7/15/2025

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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 di**alog to customize the display of data.

Related documentation:

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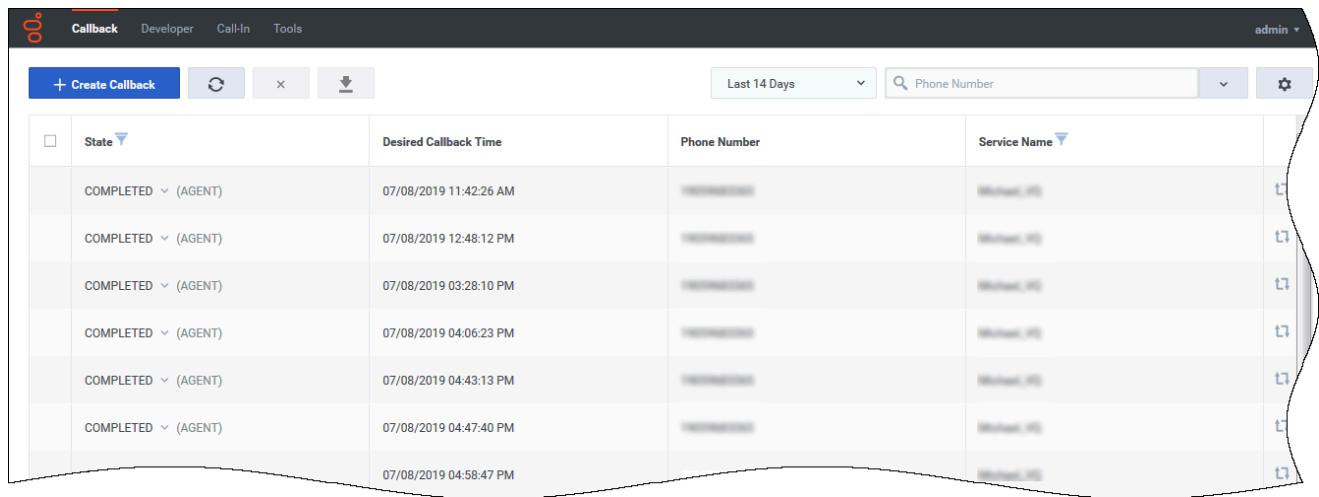
> ## Important
> Genesys Callback supports voice calls only. Digital interactions are not supported.

> ## 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.
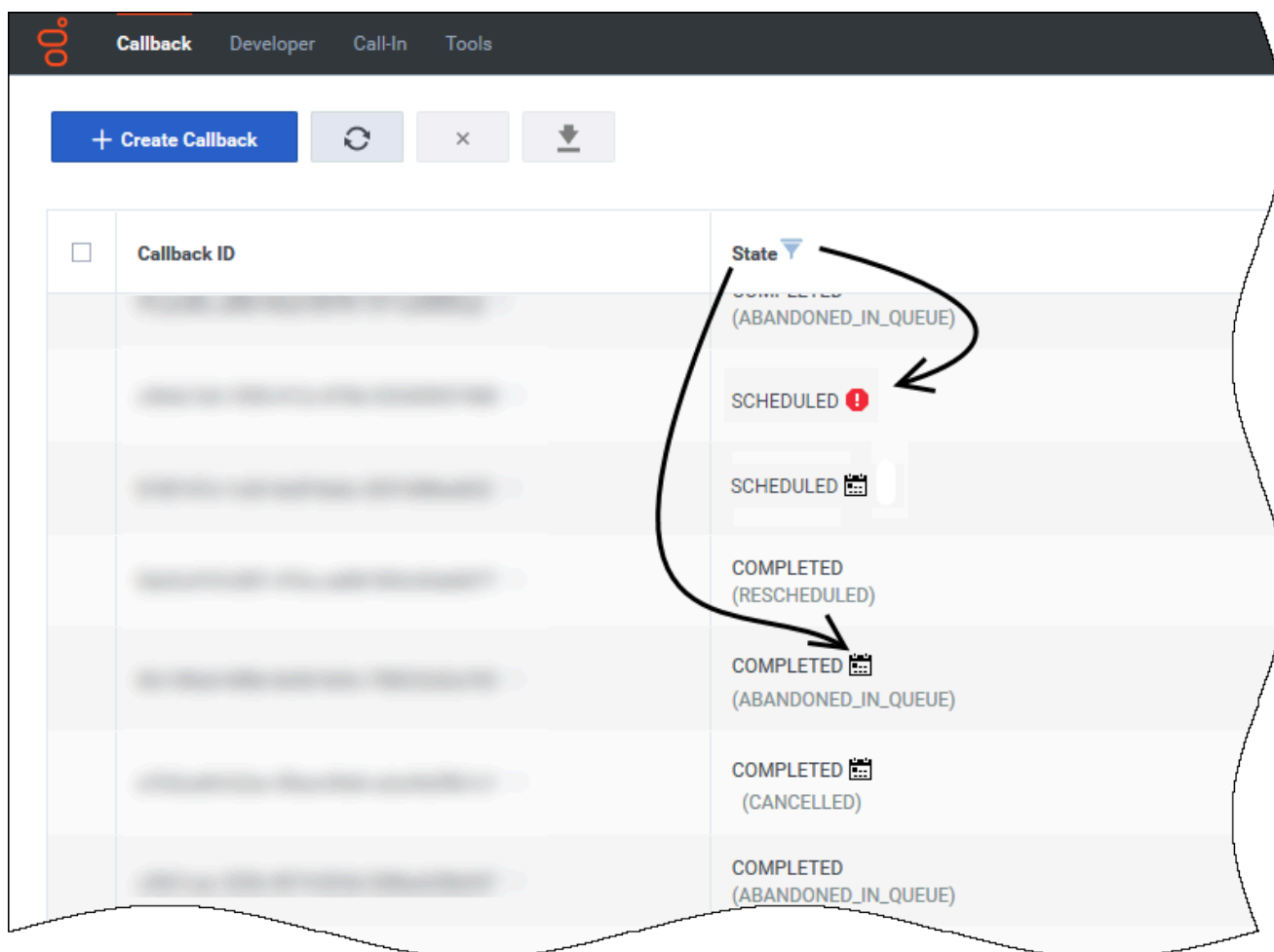
# Callback states

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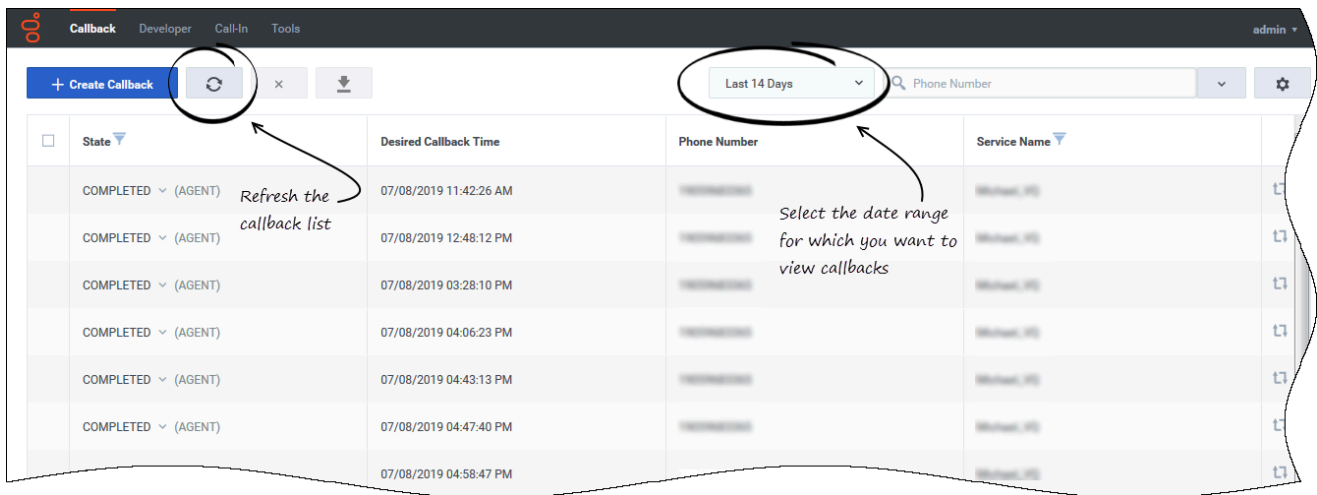
The **Callback** tab includes the following features:

- 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.
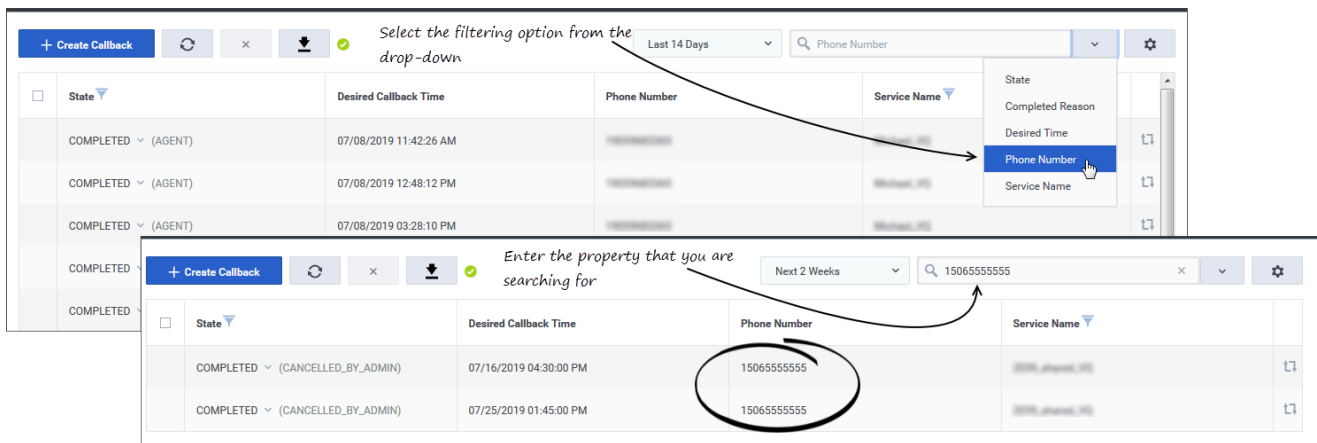
- Search box—You can select a column field in the drop-down at the right of the Search box. The interface then filters the results dynamically as you type.
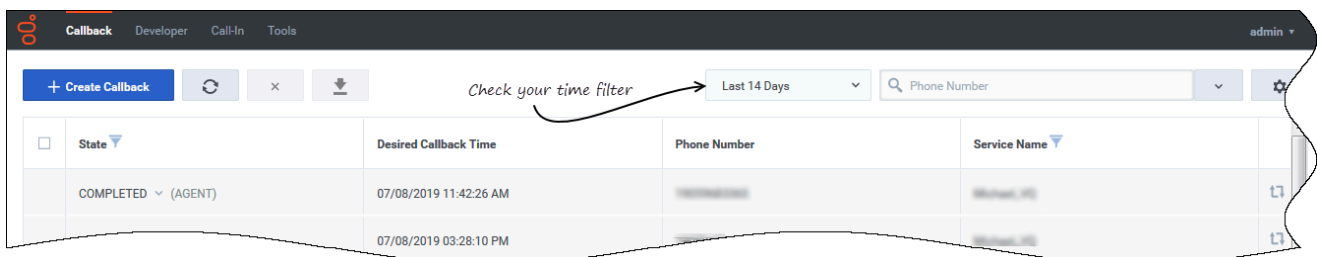
If you do not see your callback after you successfully create it, make sure that your time filters are correct. For example, if you scheduled a callback to occur in two days, it does not show up if the **Last 30 Days** label is selected. Switch to **Next 7 Days**, or something similar, to view it.

Searching for a specific interaction

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

The small arrow toggles the default metrics list

Use the Advanced Callback Metrics toggle to view a more complete list of metrics for the callback

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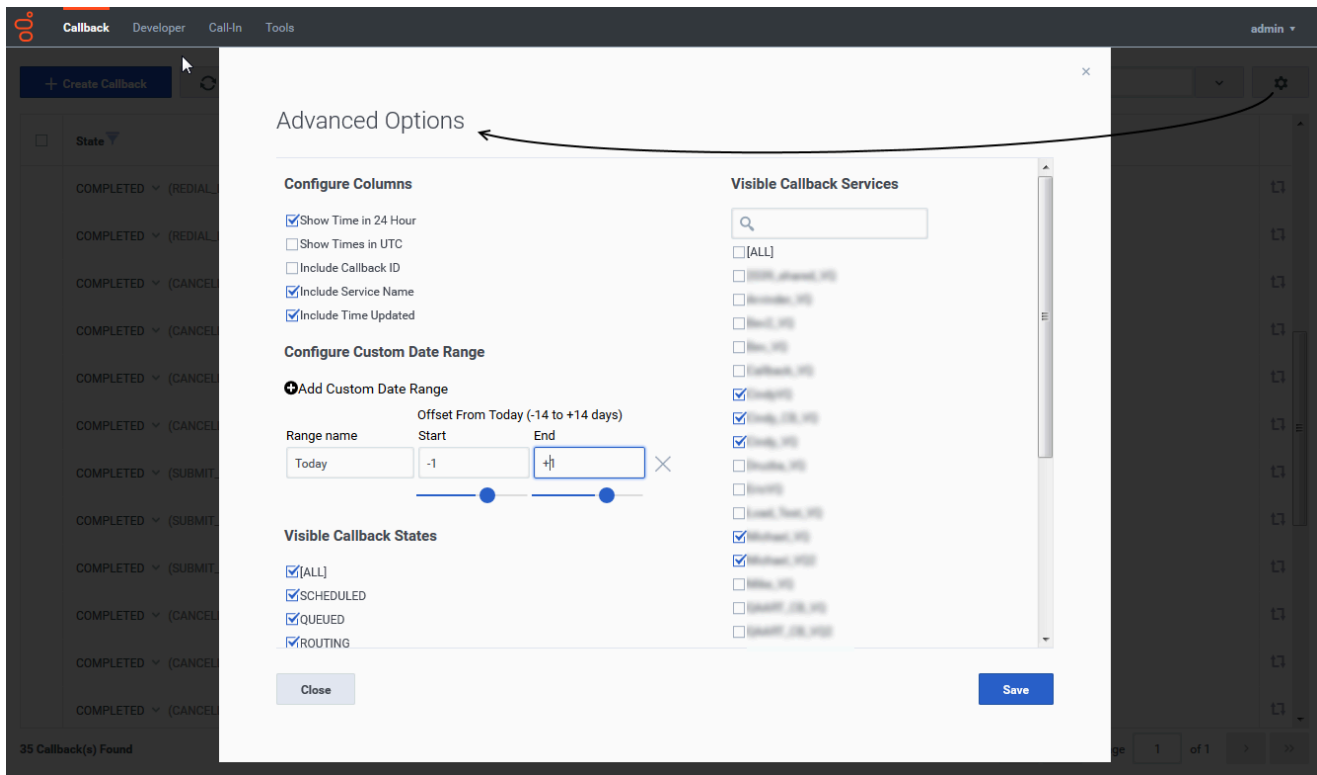
Advanced Options—Opens a dialog in which you can customize how the **Callback** tab displays data:

- **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
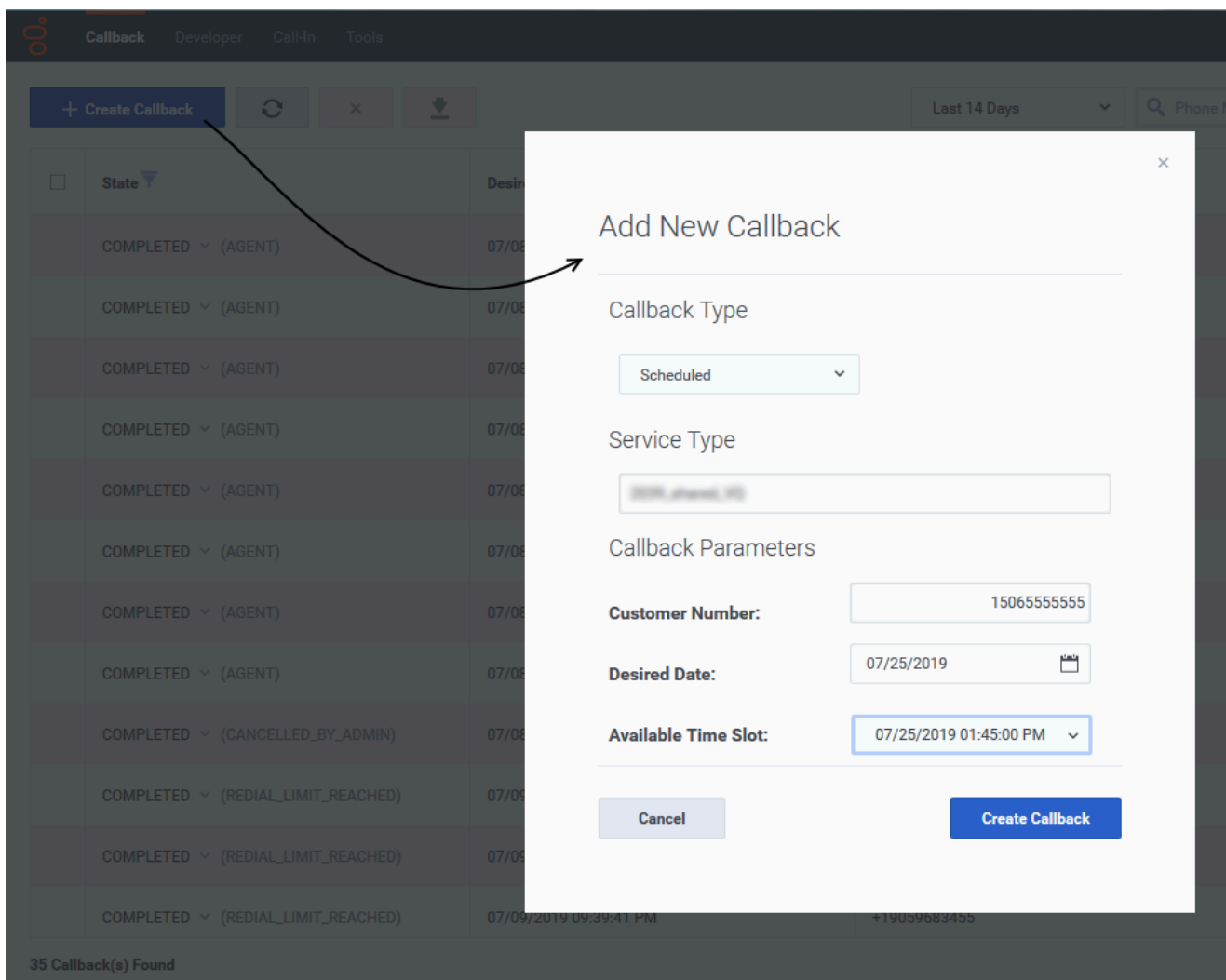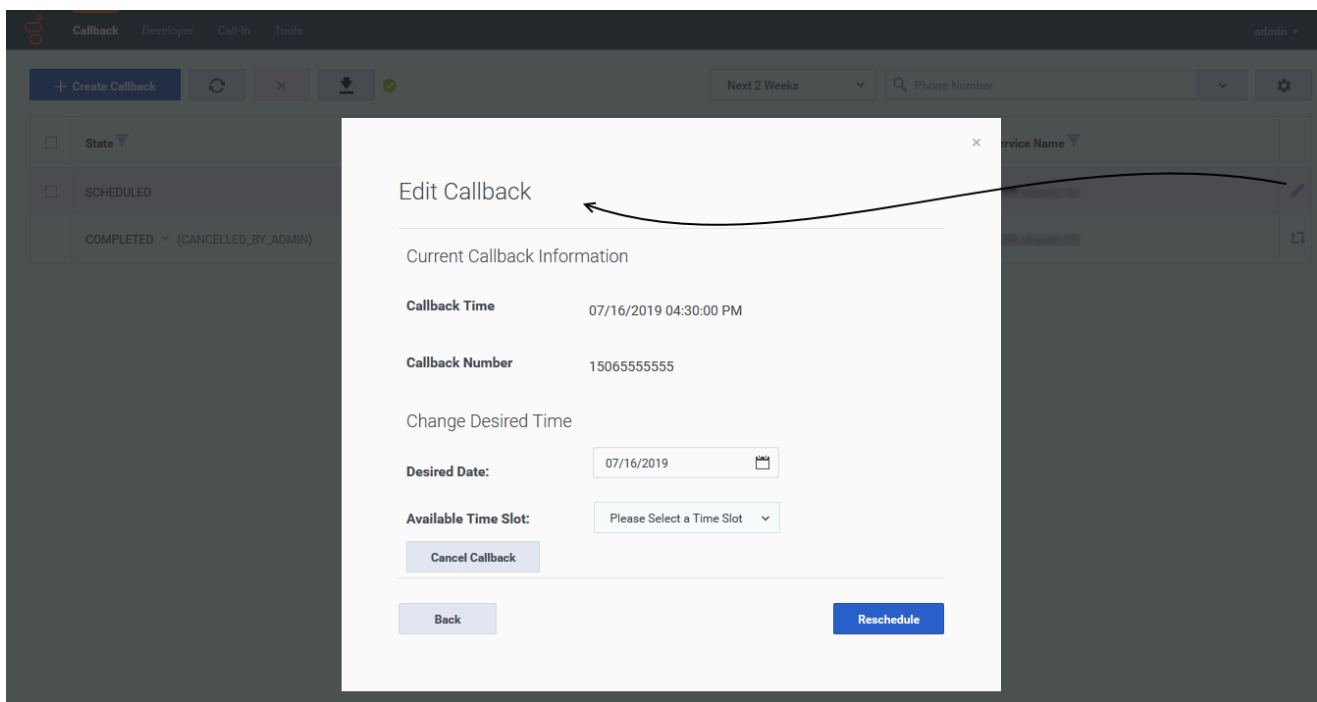
> **Important**
>
> This feature requires the **Callback Administrator** or **Callback Supervisor** role.

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.

Edit a callback

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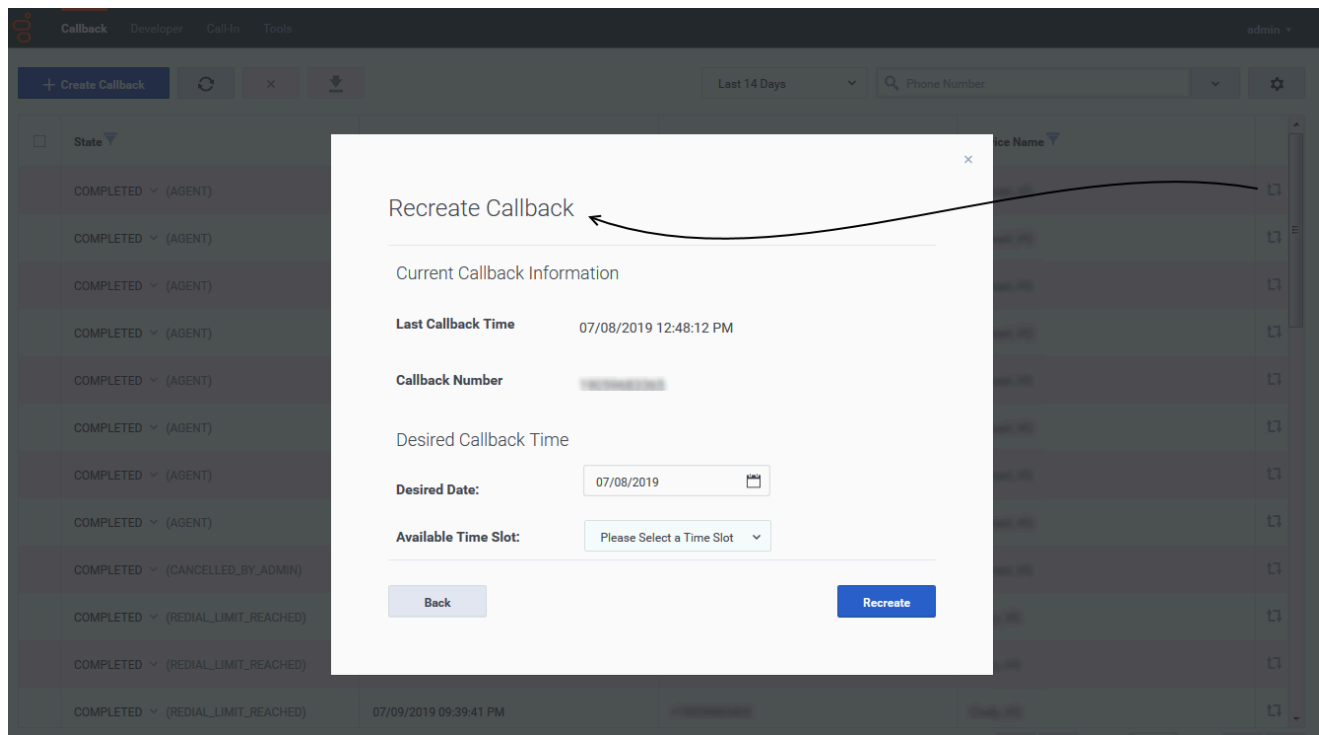
> **Important**
>
> This feature requires the **Callback Administrator** or **Callback Supervisor** role.

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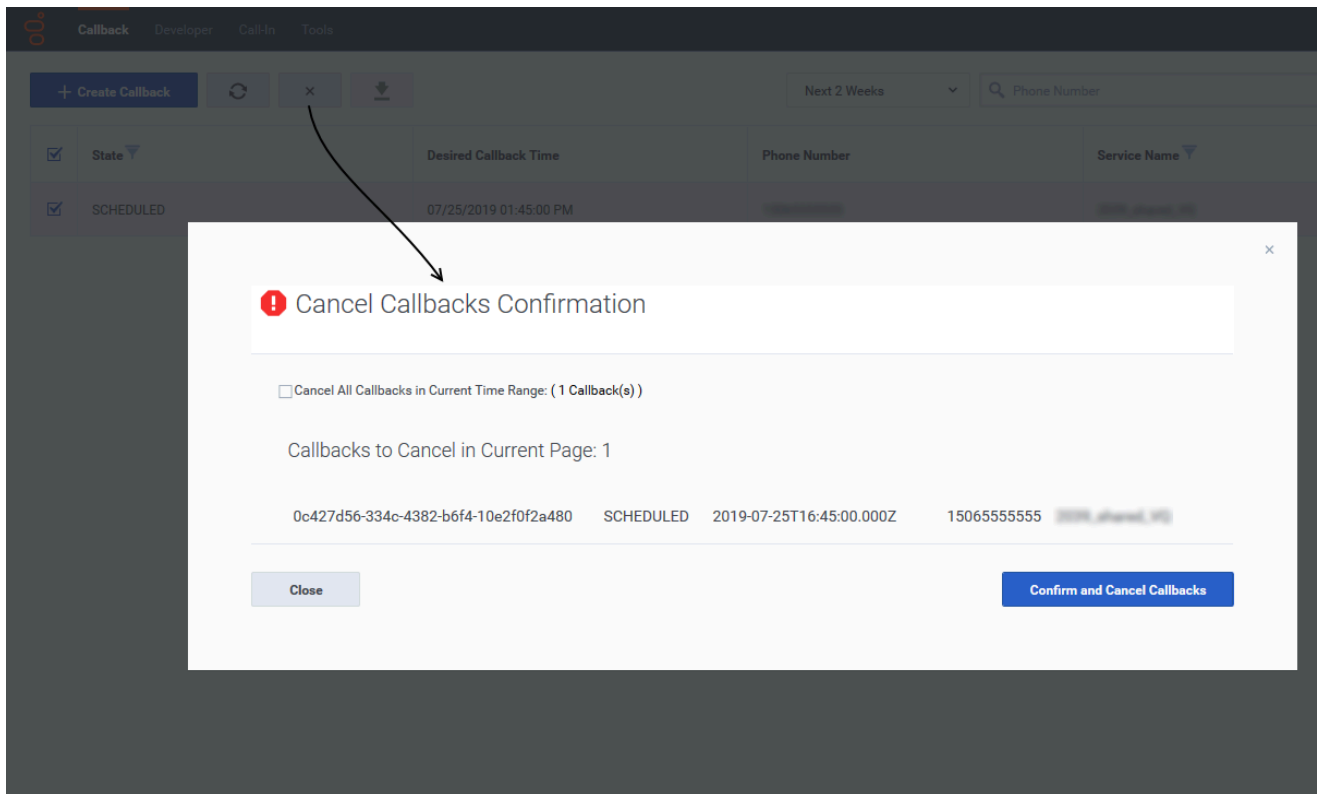
> **Important**
>
> This feature requires the **Callback Administrator** or **Callback Supervisor** role.

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.

You can export cancelled reports or recreate cancelled callbacks
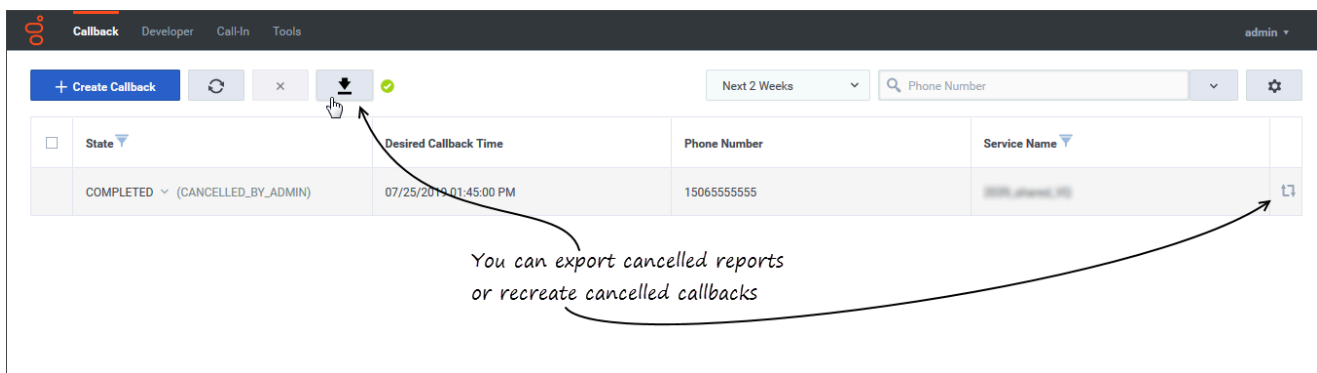
The resulting display shows all the callbacks that you have cancelled and that are now in the COMPLETED (CANCELLED_BY_ADMIN) state.
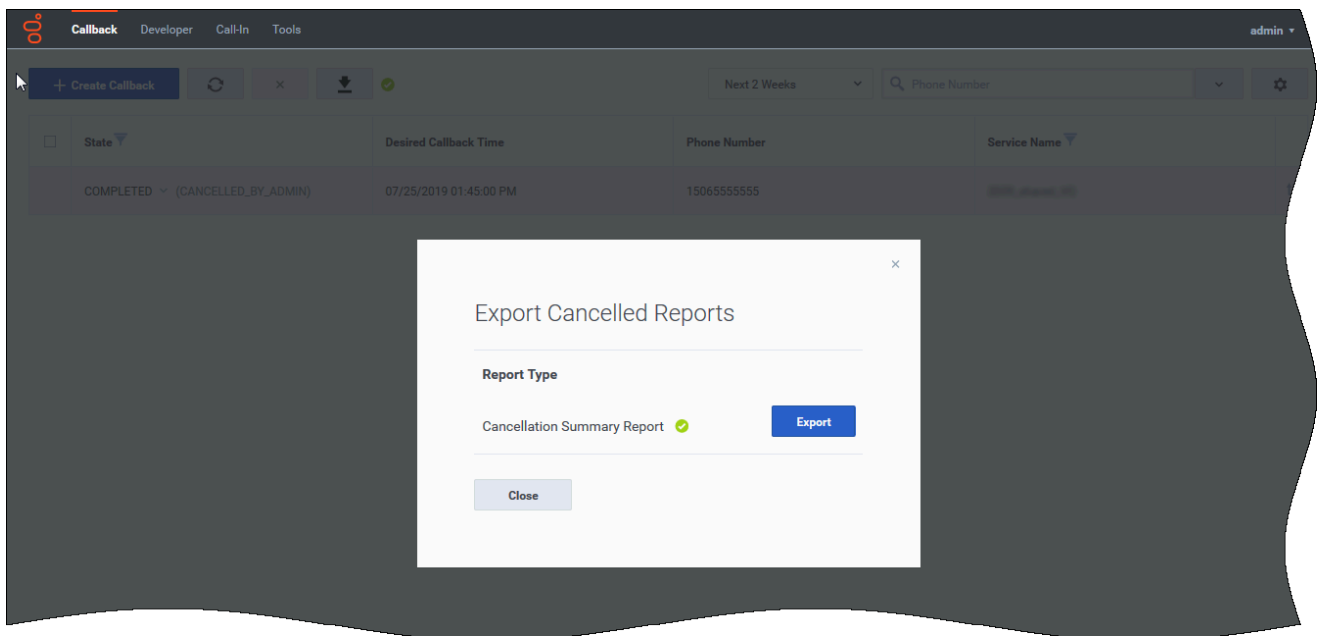
The **Export Cancelled Reports** dialog provides the **Cancellation Summary Report** file only when you have recently cancelled some callbacks. This report shows the cancellation status of the recently-cancelled callbacks.