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Genesys Task Routing Administrator's Guide

Set up Genesys Task Routing

9/17/2025

Learn how to set up Genesys Task Routing so you can submit and manage workitems from an external source like Salesforce.

Related documentation:

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Genesys Task Routing allows you to submit workitems to Genesys from an external source, such as Salesforce or NetSuite. Once these external workitems are entered in the Genesys system, you can treat them like other Genesys interactions. For example, you can route workitems to the best-skilled agent using a Designer application. You can also get interactions that were processed by an agent in Agent Workspace, including automated third-party application screen pop-ups. Reporting is available through Genesys CX Insights.

Genesys Task Routing is integrated with other Genesys solutions and it can support blended agents handling chat, email, voice and so on, at the same time they manage workitems.

Important

You should be able to complete most of the steps on your own, but sometimes you'll need help from Genesys. We'll let you know when a task requires extra help from a Genesys representative.

Define agents and agent groups

Use Agent Setup to define agents and agent groups you want to be able to handle workitems from your external system.

- Create agents
- Create agent groups
- Contact your Genesys representative to enable an Open Media channel.
- Define a capacity rule.
- Assign the Open Media channel and capacity rule to agents or agent groups.

Configure Agent Workspace

Configure Agent Workspace for the agents in your contact center.

- Configure Agent Workspace
- Contact your Genesys representative to set desktop options for the Open Media channel.

Create a Capture Point

Create a capture point to capture the workitems submitted from your external source.

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- Contact your Genesys representative to create a Capture Point.
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Create a routing application

Create a routing application in Designer to send workitems to agents based on skill, agent group, and so on. Genesys Task Routing includes a sample Designer application to show one of the possible scenarios. We recommend you use this as a starting point to create your own routing application.

- Explore the sample Designer application
 - Create a new Designer application
 - Link your application to your previously created capture point. **Note:** You can associate more than one Capture Point with the same routing application.
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Integrate third-party applications

Create a third-party system adapter that can handle workitems that come from your external source and submit them to Genesys through the Genesys Task Routing API.

- Integrate third-party applications
 - Genesys Task Routing API
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View dashboards in CX Insights

View historical reporting for Genesys Task Routing in CX Insights.

- View Genesys Task Routing dashboards
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