GENESYS™

Genesys Cloud CX Use Cases

Genesys Customer Authentication (CE07) for Genesys Cloud

2/24/2026

Identify and verify customers in your IVR

What's the challenge?

Most IVRs require your customers to manually enter their information each time they call. Customers typically have to supply that information again when they're connected with an agent or transferred — leading to longer handle times, higher purchase abandonment and poor customer experience scores.

What's the solution?

Cut out time-consuming identification steps with a simple, automated caller ID. Genesys Customer Authentication integrates with your customer database to identify callers by their phone number. This context is passed across channels — so you can identify, verify and proactively greet customers, without repetition.

Link to video

Other offerings:

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Contents

Use Case Overview

Story and Business Context

Smart contact center software knows who's calling. Genesys Cloud CX identifies customers based on their caller ID or prompts the customer for identifying information. This information is passed throughout the call flow for progressive identification and verification — so your customers don't have to repeat themselves and your agents can start solving problems faster.
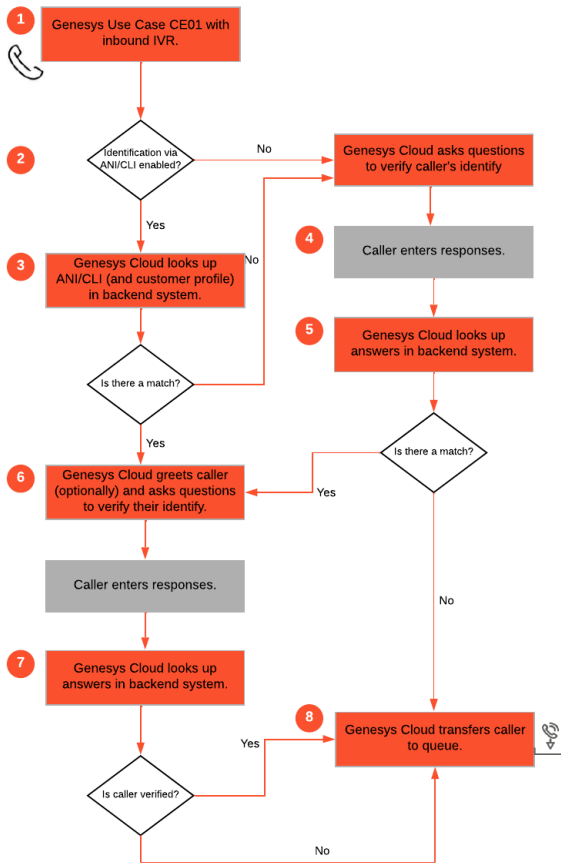
Use Case Benefits*

The following benefits are based on benchmark information captured from Genesys customers and may vary based on industry, lines of business or Genesys product line:

Use Case Benefits	Explanation
Improved Containment Rate	Reduce agent handled inbound call volume by improving containment rate through a robust and flexible solution
Improved Customer Experience	Improve NPS by saving the customer time through efficient and automated ID&V interaction and by extending a more personal approach offered by agent (knowing who the customer is)
Reduced Handle Time	Reduce agent handled time due to a partial automation call through identification and verification (ID&V) with IVR.
Reduced Interaction Abandonment	Certain self-service tasks require a solid means of authentication. If a caller cannot be adequately identified, the call will likely end up waiting for an agent to be available.

Summary

Use Case Definition

Business Flow

Business Flow Description

1. The IVR answers a call.

2. If enabled, Genesys Cloud CX identifies a customer using the Automatic Number Identification (ANI) / Caller Line Identification (CLI). BL1

3. If ANI / CLI are available, Genesys Cloud CX performs a lookup in the company's back-end system (for example, the CRM) to identify the caller.

4. If identification via ANI / CLI is disabled or fails, Genesys Cloud CX asks for a separate Identifier (for example customer ID, account number, tracking number, or alternate phone number) to identify the customer. The caller must respond to this question by entering a numeric value. If the customer does not have the required information, they can opt out and proceed down an unauthenticated path.

5. The customer input is validated against the enterprise/organization's back-end system (for example, the CRM). If a match cannot be found, Genesys Cloud CX asks the customer for their identifier. Genesys Cloud CX requests this information up to a maximum of three times after failure. The number of retry attempts is configurable. If Genesys Cloud CX cannot successfully validate the customer, the customer is transferred to a queue for agent-assisted service.

6. If needed for security purposes, Genesys Cloud CX can ask for additional information to validate the caller's identity. The caller must respond to this question by entering a numeric value.

7. Genesys Cloud CX validates the information entered against the organization's back-end system (for example, the CRM). If this validation is unsuccessful, Genesys Cloud CX asks the customer for security information again, up to a maximum of three times after failure. The number of

retry attempts is configurable. If Genesys Cloud CX cannot successfully validate the customer, Genesys Cloud CX transfers customer to a queue for agent-assisted service.

8. After successful identification and verification, Genesys Cloud CX transfers the call to the next step of the overall call flow. This step could be an agent-assisted service or a self-service application. To simplify subsequent interactions during this call, Genesys Cloud CX retains the customer identifier and verification status. Later Genesys Cloud CX can display this information to an agent by using scripts.

Business and Distribution Logic

Business Logic

Parameters and Business Rules

- **Customer identification by ANI / CLI** - Step 3 in the business flow can be enabled or disabled depending on specific business requirements. If this step is disabled, the flow always asks for a customer identifier. (for example customer ID, account number, or tracking number.) You can set this parameter for each company service line.

- **General: Voice Prompts** - The business can configure all voice prompts within this flow.

Distribution Logic

There is no applicable content for this section.

User Interface & Reporting

Agent UI

If Genesys Cloud CX transfers the call to an agent, the agent receives an indication whether the customer is:

- Identified and verified

- Identified only

- Not identified or verified

If they are available in the back-end system, Genesys Cloud CX displays the customer's identifier and name.

Reporting

Real-time Reporting

Due to the continuous evolution, the features available in Genesys Cloud CX rapidly change. See the Genesys Cloud CX Resource Center for latest features at http://help.mypurecloud.com.

The following are examples of Genesys Cloud CX Historical and Real-time views that provide relevant insights:

- Agent

  - Agent views provide metrics on agent status, agent performance, agent interactions, and other metrics to understand agent activity. Filters include skills, languages, wrap-up codes, and more.

- Queue

  - There are several views that provide insight into both real-time and historical queue activity.

  - The Queue Activity view shows real-time metrics, including all calls that are currently waiting on and interacting with agents.

- Interactions

  - The Interactions view provides detailed information on both historical and real-time interactions.

  - It allows supervisors to filter interactions based on metrics including agent names and wrap-up codes.

- Reports

  - Genesys Cloud CX has a full library of canned reports available in .pdf and .xlsx formats.

  - Supervisors can filter these reports by dates, users, queues, and so on.

  - Supervisors can download reports from the Genesys Cloud CX user interface.

  - Supervisors can schedule reports to run and download in batch.

- Other Views

  - WFM

  - Quality

  - Outbound

  - Scheduled Callbacks

  - Campaigns

  - And more

Historical Reporting

Same as real-time Reporting.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

All of the following required:	At least one of the following required:	Optional	Exceptions
Inbound • Genesys Personalized Routing with Callback (CE43)	None	None	None

General Assumptions

- Identify the customer using the businesses publicly available REST endpoint. This endpoint must provide the appropriate web services and must be web accessible.

- Validate the customer's identity using the publicly available REST endpoint that the business provides.

- The business must either have a unique identifier or a phone number for each customer used for identification.

- If the business requests customer entries, the unique identifier must be numeric.

Related Documentation

Document Version

- Version **V 1.0.2** last updated **February 25, 2026**