Genesys Cloud CX Use Cases

Rule-Based Decisions by Genesys (CE46) for Genesys Cloud

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Give customers the ability to develop, author, and evaluate business rules to improve classification and routing decisions.

What's the challenge?

Customers want to have a seamless and scalable way to handle complex business rules within their organization. They want to be able to author business rules for the purpose of making decisions, test these business rules to ensure they are optimized and have the capabilities to better understand these business decisions and the usage of rules. They want an all-in-one solution for creating and managing Business Rules.

They want to have more power when creating and managing business rules for routing. Dependencies on IT and technical team hampers agility and innovation. Governance of such rules is increasingly difficult if there are multiple channels and not a single place to monitor changes and audit.

What's the solution?

Rule-Based Decisions provides the power to the business users to develop, author, and evaluate business rules. It allows organizations to centralize the definition, management, and execute complex sets of rules and logic in a consistent and automated manner. IT teams still can govern the business rules centrally without the hassle of ensuring rules for each and every channel. Users can test business rules to make sure they work properly and are optimized. It gives them the ability to manage, search, arrange, and group them for better administration. Rule-Based Decisions also provides capabilities to better understand business decisions and usage of rules and APIs or other development tools for integrating with other applications such as ERP systems, CRM software, supply chain suites, among many others.

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Use Case Overview

Story and Business Context

Rule-Based Decisions is a capability of Genesys Cloud that provides the ability to develop, author, and evaluate business rules. A rules engine, often referred to as a business rules engine (BRE) or a rules-based system, is a software component or system that allows organizations to define, manage, and execute complex sets of rules and logic in a consistent and automated manner. A business rule is a piece of logic defined by a business and its execution is important for the running of the business. Multiple business rules, essentially if-then scenarios, can be considered together to make business decisions. Depending on how the decision is defined, the decision process can execute any number of logic steps and actions to arrive at a logical output.

Rule-Based Decisions provides the below capabilities:

- Business users can author business rules for the purpose of making decisions.
- Test business rules in order to make sure they work properly and are optimized.
- Give users the ability to manage, search, arrange, and group them for better administration.
- For a decision table, arranging would mean sequencing them in rows. For individual rules which might be packaged together, arranging will mean sequencing and ordering them. A decision table will be governed by multiple policies like First match, All match, Last match etc. Our default policy is First Match.
- Provide capabilities to better understand business decisions and usage of rules.
- These rules are evaluated in a Rules Engine based upon requests received from client applications (Genesys as well as external)
- Provide APIs or other development tools for integrating with other applications such as ERP systems, CRM software, supply chain suites, among many others.

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 Customer Experience	Correct Routing leads to quicker and efficient resolution which increases customer satisfaction.
Improved Employee Utilization	Better routing leads to Agents using their time better and increasing their efficiency.
Improved First Contact Resolution	Every customer is routed correctly using a no-code engine built for context, control and speed.
Reduced Handle Time	Routing decisions are based off of structured business rules and decision tables which leads to a quicker resolution of issues.

Use Case Benefits	Explanation
Reduced Transfers	Routing calls to agents based on custom business rules improves accuracy and reduces the need for internal transfers.

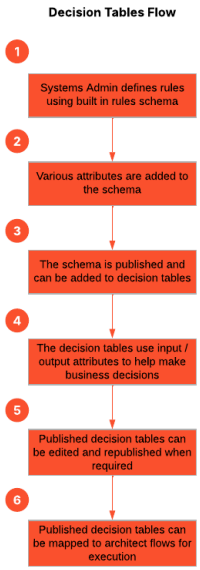
Summary

Rule-Based Decisions is used to create and execute structured business logic at scale through decision tables, for classification and routing decisions. It is used to create rules schemas and decision tables to define stateless business logic, invoke decision tables from a flow to execute routing and handling rules for an inbound interaction and make real-time updates to rules parameters to allow intra-day changes to the system. Rule-Based Decisions will provide customers with an all-in-one solution to create and manage business rules and logic for CX and EX orchestration.

Use Case Definition

Business Flow

Decision Tables Flow

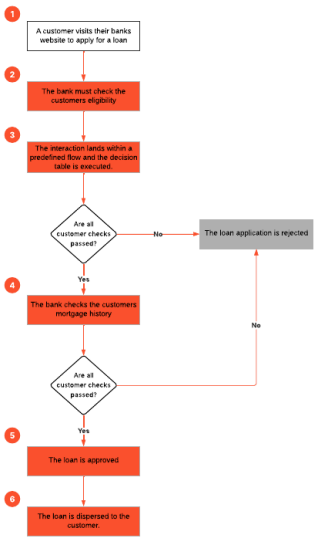


Business Flow Description

1. A systems admin defines rules / constraints using a built-in rules schema
2. Various attributes are added to the rules schema
3. The schema is published and can be added to decision tables.
4. Decision tables use rules schemas to help make business decisions for Genesys Customers using input and output attributes.
5. Published decision tables are versioned and can be edited and republished when needed.
6. Published decision tables can be mapped to architect flows for execution.

Business Flow

Customer Journey Flow



Business Flow Description

1. A customer visits a bank website looking to apply for a loan
2. The bank must check the customers eligibility using the rules schema from a Genesys Decision table
3. The interaction lands inside a predefined flow where the decision node is activated and the decision table is executed
4. If all checks are passed based on decision tables, the bank the checks the customers mortgage history
    - If the customer fails the checks based on the decision tables rules, the loan is rejected
5. If the customer passes the mortgage check, the loan is approved

- If they fail the mortgage check, the loan is rejected

6. The loan is dispersed to the customer.

Business and Distribution Logic

Business Logic

Rules Schema

- The systems Admin uses the built in Rules Schema to define the boundary conditions and constraints of a decision table.
- The schema has a name and description and will support various attribute types.
- The schema builder supports all major attribute definition types as needed for Rules Schema.
- Once saved, an attribute is added to the schema.
- Schema builder also supports platform entities to be added as attributes. Once a platform entity is added to a schema, it inherits all properties of that object for that organization.
- Multiple types of attributes can be added to the schema.
- The schema can be saved as a draft and then published when all details are confirmed.
- Once published, the schema becomes active and can be used in decision tables.

Decision Tables

- Decision tables support multiple inputs and outputs.
- The rules Admin can choose the comparator for an attribute and define Default Values whenever necessary.
- “Add Rows” is used to add more rows of business logic to the decision table.
- The final decision table is populated and can be saved to be published later.
- Published tables can be edited by an admin and republished later. The tables are all versioned.
- Decision tables can also be copied / duplicated.

User Interface & Reporting

Agent UI

N/A

Reporting

Real-time Reporting

N/A

Historical Reporting

N/A

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
None	None	None	None

General Assumptions

N/A

Customer Responsibilities

- Customers provide their own rules schema, including required attributes and value types.
- Customers build their own decision tables to define their business logic.
- Customers manage their own versioning, publishing and governance.
- Monitor system behavior and adjust rule parameters as needed.

Document Version

- Version **V 1.0.0** last updated **February 9, 2026**