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Genesys Cloud CX Use Cases

Genesys CRM Collaboration (OP02) for Genesys Cloud

2/15/2026

Important

Making routing decisions requires business logic and these details are specific to the implementation. Routing decisions and screen pops depend on the types of information stored in and retrieved from the CRM.

Enhance routing capabilities and drive agent screenpops using Genesys Cloud CX Data Actions

What's the challenge?

CRM information and the contact center traditionally been silo'ed, but they don't have to be. The contact center can leverage integrations to the CRM to provide a superior customer experience and more efficient handling of calls through improved routing decisions and the surfacing of critical context to the agent as the call is delivered to them.

What's the solution?

Using information stored in the CRM regarding your customer and their prior interactions with your business can be used to great effect by the Contact Center. Data enabling your IVR allows for the customer experience to be more personalized, addressing the caller by name and confirming critical information prior to reaching an agent. Lastly, the information gathered from the CRM can be surfaced directly to the agent.

Link to video

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Use Case Overview

Story and Business Context

CRMs and the contact center often coexist, serving as complimentary pieces to the customer experience puzzle. The contact center can use information stored in the CRM about your customer and their prior interactions with your business to provide a more personalized, meaningful, and effective customer experience. Data enables your IVR to make the customer experience more personalized, addressing the caller by name and confirming critical information before they ever reach an agent. This data can also be used to make advanced routing decisions, steering the customer to the appropriate queue to handle their inquiry. Once a queue is chosen, the system selects the appropriate skills an agent in that queue should have to properly handle this inquiry. The system provides the ACD engine all the facets it should consider when making a routing determination. Lastly, the information gathered from the CRM can be surfaced directly to the agent when they receive the call. The agent will have all the necessary context to quickly and efficiently handle the call.

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	Personalize IVR experience and improve routing efficiency creating an improved overall customer experience.
Improved First Contact Resolution	Improved FCR by enabling more intelligent routing.
Reduced Handle Time	Reduced handle times by providing critical interaction context directly to the agent desktop

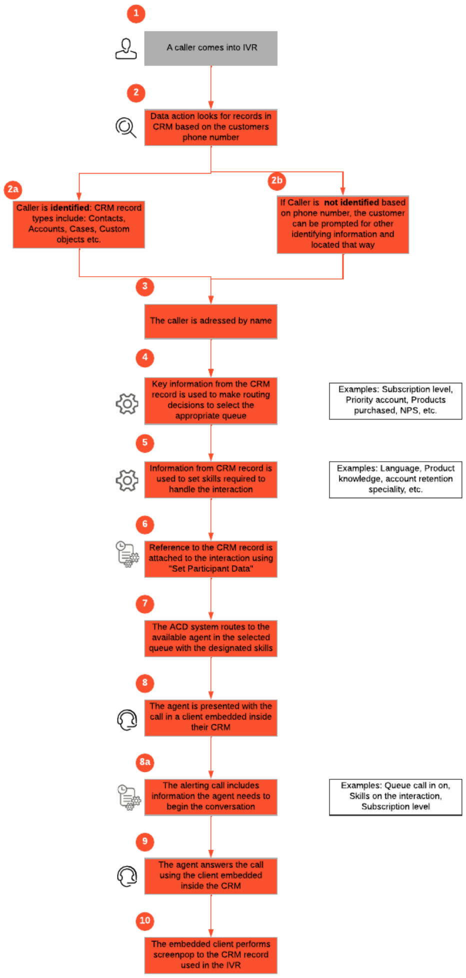
Summary

Genesys Cloud CX supports out of the box integrations for Salesforce, MS Dynamics CRM 365, and Zendesk. Genesys Cloud CX also supports a “generic” integration that connects to a wide range of REST and GRAPH APIs. For more information, see: https://help.mypurecloud.com/articles/requirements-for-the-data-actions-integration (web services tab).

Use Case Definition

Business Flow

Business Flow Description


1
A caller comes into IVR
2
Data action looks for records in CRM based on the customers phone number
2a
Caller is **identified**: CRM record types include: Contacts, Accounts, Cases, Custom objects etc.
2b
If Caller is **not identified** based on phone number, the customer can be prompted for other identifying information and located that way
3
The caller is adressed by name
4
Key information from the CRM record is used to make routing decisions to select the appropriate queue
Examples: Subscription level, Priority account, Products purchased, NPS, etc.
5
Information from CRM record is used to set skills required to handle the interaction
Examples: Language, Product knowledge, account retention speciality, etc.
6
Reference to the CRM record is attached to the interaction using "Set Participant Data"
7
The ACD system routes to the available agent in the selected queue with the designated skills
8
The agent is presented with the call in a client embedded inside their CRM
8a
The alerting call includes information the agent needs to begin the conversation
Examples: Queue call in on, Skills on the interaction, Subscription level
9
The agent answers the call using the client embedded inside the CRM
10
The embedded client performs screenpop to the CRM record used in the IVR

Business Flow Description

1. Call enters the IVR.
2. Based on the customer's phone number, the data action searches for records in the CRM.
    - 2a Caller is identified. CRM record types can include contacts, accounts, cases, custom objects, etc.
    - 2b Caller is not identified. If the caller is not identified based on phone number, the customer can be prompted for other identifying information to locate the contact.
3. Caller is addressed by name.
4. Key information from the CRM record is used to make routing decisions and select the appropriate queue.
    - Examples: Subscription level, priority account, products purchased, and NPS.
5. Information from CRM record is used to set up to five skills required to handle the interaction.
    - Examples: Language, product knowledge, and account retention specialty.
6. Reference to the CRM record is attached to the interaction using a Set Participant Data action.
7. The ACD system routes to the available agent with the designated skills in the selected queue.
8. Agent is presented with the call in a client embedded inside their CRM.
    - Alerting call includes information the agent needs to begin the conversation.
        - Examples: Queue call in on, skills on the interaction, subscription level.

9. The agent answers call using client embedded inside the CRM.
10. The embedded client performs screenpop to the CRM record used in the IVR.

Business and Distribution Logic

Business Logic

Distribution Logic

- Install the data action integration relevant to your CRM:
  - https://help.mypurecloud.com/articles/add-a-data-actions-integration/
- Configure and test your data actions:
  - https://help.mypurecloud.com/articles/create-custom-action-integrations/
  - https://help.mypurecloud.com/?p=141929
- Add the data action to your call flow:
  - https://help.mypurecloud.com/articles/use-data-actions-for-integrations/
- Install the CRM integration from AppFoundry:
  - https://appfoundry.genesys.com/#/filter/purecloud

User Interface & Reporting

Agent UI

There are two methods to deliver a screen pop, either use an agent script or agent UI embedded into the CRM.

Reporting

Real-time Reporting

There is no applicable content.

Historical Reporting

There is no applicable content.

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

Customer Responsibilities

- Customer has a CRM.
- Assumes CRM has web service endpoints to access records.
- Assumes they are not using sensitive data to make routing decisions.

Related Documentation

Document Version

- Version **V 1.0.2** last updated **February 16, 2026**