



This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

Genesys Engage On-Premises Use Cases

Genesys Work and Lead Distribution (BO02) for Genesys Engage on premises

Important

Please be advised that this use case has been merged with Genesys Lead Engagement (SL05). SL05 has now been decommissioned and all relevant content is displayed in this use case.

Optimizing work distribution across the enterprise to deliver all promises on time

What's the challenge?

You need a better way of distributing & managing work stored in disparate enterprise systems. You need your team to get more conversions in less time. When work or leads are not automatically distributed to the best available skilled resource, the result is a negative impact to customer promises, workloads, SLAs, churn, and sales conversions.

What's the solution?

Automate the distribution of work and leads to improve productivity and enhance the overall interaction experience. Genesys pulls work from multiple systems to create a single list, then automatically categorize, prioritizes, and routes work and captured leads to the best qualified employee anywhere in your company. Eliminate “cherry-picking” and misrouting to process work and leads faster and more efficiently for better resource planning, equitable work assignment, and conversion rates.

[Link to video](#)

Other offerings:

-

Contents

- [1 What's the challenge?](#)
- [2 What's the solution?](#)
- [3 Use Case Overview](#)
 - [3.1 Story and Business Context](#)
 - [3.2 Use Case Benefits*](#)

-
- 3.3 Summary
 - 4 Use Case Definition
 - 4.1 Business Flow
 - 4.2 Business Flow
 - 4.3 Business and Distribution Logic
 - 4.4 Distribution Flow
 - 5 User Interface & Reporting
 - 5.1 Agent UI
 - 5.2 Reporting
 - 6 Customer-facing Considerations
 - 6.1 Interdependencies
 - 7 Related Documentation
 - 7.1 Agent Workspace
 - 7.2 Workspace Desktop Edition
 - 7.3 Document Version

Use Case Overview

Story and Business Context

Work items and sales leads created in CRM, BPM, marketing, email, or workflow source systems each have their own business processes and corresponding journey touchpoints. Siloed workbins across different business units, geographical regions, systems, or resource groups cause inefficient distribution of work items and sales leads.

It is challenging to distribute high volumes of work items and sales leads fairly, quickly, and in accordance to the underlying customer commitment or SLA. While many have invested in automation, these systems and applications focus on the process and not the employees who actually complete the processes.

Genesys Intelligent Workload Distribution (iWD) allows for the effective management of all enterprise work items and leads. Capturing work created in multiple source systems, placing them into a universal queue, and constantly reprioritizing them based on business needs delivers efficient distribution. Genesys distributes work items and leads at the right time to the best-skilled and available employee to complete the task or close the lead.

The ability to define and edit business logic easily drives the proper prioritization and distribution of leads between the available resources. It also prevents “cherry-picking” of work and balancing out the interactions between the available resources fairly and equally. Work items and sales leads can be segmented and prioritized based on multiple business parameters such as lead capture date, expected value, customer segment, and so on. For example, a consumer shopping online that has abandoned their shopping cart is an interaction captured by the website and delivered to Genesys iWD as a “hot lead.” The lead takes its place in the universal queue with a priority schema defined by the size of the shopping cart, the value of the product or service, or other data points about the customer. The lead is constantly reprioritized and then distributed based on business rules that define the service level.

By using Genesys iWD, companies improve their throughput and lead conversion rates, while managing operational costs, enhancing customer experience, and keeping employees satisfied.

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	Deliver all committed work items on time to customers. Automation of lead follow-up ensures faster responses to prospects, improving their experience. Rigorously applying skills-based routing to match segmented leads with the best-skilled employee.
Improved Employee Utilization	Remove cherry-picking by pushing work items to the right employees. Prioritizing and presenting

Use Case Benefits	Explanation
	leads to sales reps reduces idle time, increases throughput, and improves their utilization.
Increased Revenue	Value-based prioritization speeds up response times for important leads, increasing conversion rates and revenue. Prioritizing and re-prioritizing leads based on various business values at that moment in time.
Reduced Administration Costs	Intelligently automate work item distribution, reduce manual distribution and monitoring of tasks by supervisors, improve scheduling and reporting. Add visibility into employee and group performance. Automatic lead distribution reduces time spent by supervisors and administration staff in monitoring, distributing, and reporting on leads. Providing visibility through real-time and historical metrics. Providing necessary data for workforce management and optimization.
Reduced Employee Attrition	Offer fair distribution of workload across the available resources. Visibility into how leads are processed by employees.

Summary

The design of Genesys Intelligent Workload Distribution (iWD) enables effective capture, classification, prioritization, management, and distribution of work items and high value leads. This distribution occurs across multiple departments to the best-suited employees, based on business segmentation, resource skills, and availability.

The powerful iWD Manager enables business users to define and adjust business segmentation rules and prioritization schemas, as well as view near real-time dashboards into operational performance and backlog. Genesys gives administrators control over the routing logic once the task or lead needs to be delivered to the Genesys agent workspace.

Genesys captures new work items or leads from multiple source systems and creates an interaction in the system. The interaction goes through a process of classification, segmentation, and prioritization within the universal queue based on the business rules created.

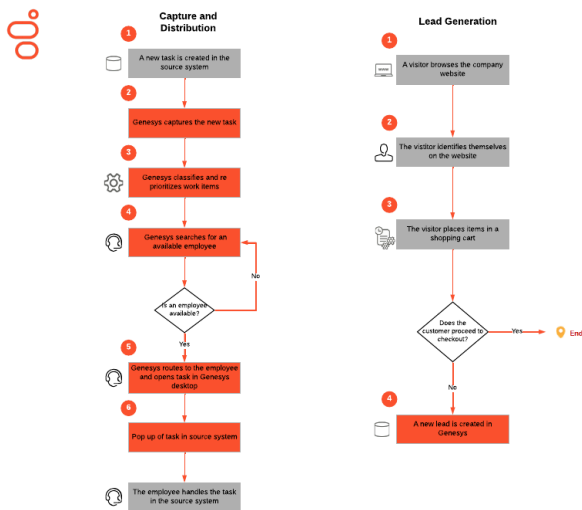
Once an employee with the right skill profile becomes available, the Genesys core routing engine is used to distribute it to the employee in the Genesys agent workspace at the right time to convert the lead or execute on the task. If it cannot be assigned to an employee within a specified period, it continues to be reprioritized.

Use Case Definition

Business Flow

(1) Part 1 - Capture and Distribution / Lead Generation

The diagrams in the following chapters show the business flow of this use case.



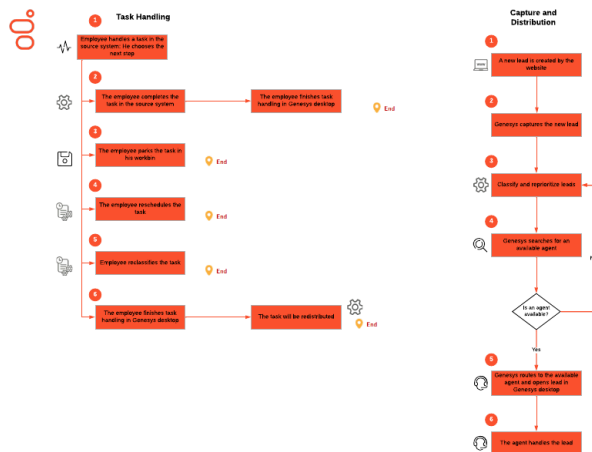
Business Flow Description

1. The system creates a new item in the system with all attached data necessary to process. For leads, see the "Attributes" topic. The source system requires an employee to handle a work item. The source system is the BPM, CRM, or business system that stores and processes the work items associated with said business process. Genesys Intelligent Workload Distribution creates the corresponding work item via the Capture Adapter.
2. Genesys captures the new work item and handles the creation of a new interaction in the system.
3. The interaction is classified and prioritized according to specific lead rules and the business value of the lead (or) the nature of the work item. The lead and work items reprioritize continually if they fail distribution to an employee.
4. The lead/work item is queued with all other interactions in the Genesys system. The priority of these items defines the position in the global queue. Once an employee with the right skill profile becomes available to handle the work item, the item distributes to that employee. If the system cannot assign it within a specified period, it remains reprioritized.
5. The respective employee (could be lead development representative or an Agent) will be able to open the task in the Workspace Desktop to manage and/or complete the task.
6. The lead development representative could use the contact provided by the customer to contact the lead. For work items, the

agent could open them with their respective CRMs to further handle the task.

Business Flow

(2) Part 2 - Work Item Handling



Business Flow Description

- The employee handles the lead/work item (either an outbound call for leads or through source system for work items). After finishing their work, they decide on the next step.
 - After the outbound call the lead representative could record the result for reporting purposes (converted, not converted) (or) the source system updates Genesys that the work item is completed and Genesys can archive the work item
 - Alternatively, the employee couple complete the task within the Workspace desktop (using the "mark done" button).
- The employee may be able to complete the work item so that no further action is required.
 - After the outbound call the lead representative could record the result for reporting purposes (converted, not converted) (or) the source system updates Genesys that the work item is completed and Genesys can archive the work item
 - Alternatively, the employee couple complete the task within the Workspace desktop (using the "mark done" button).
- The employee may choose not to finish their work immediately if, for example, they are waiting for a call back from the customer or a colleague. In this work item, the employee can park the work in their personal workbin.
- The employee may need to reschedule the work item if, for example, the customer is only available on the next day. They reschedule the work item via the source system.
- The employee may not be able to handle the work item because it is wrongly classified. They reclassify the work item via the source system. (not applicable for leads)
- The employee might not take any action in the source system(not applicable for leads):
 - The employee may accidentally finish

the work item in the employee desktop without any update in the source system ("mark done"). To prevent this the mark done button can be disabled in Genesys desktop.

- Genesys does not receive an update of the work item via the Cloud REST Capture Adapter. In this scenario the source system needs to check for these tasks and update/restart the tasks in Genesys.

Business and Distribution Logic

Business Logic

Before Genesys receives work items, the source system classifies the work and attaches all the necessary metadata. Then, Genesys matches this work with the best employee at the right time.

Genesys system analyzes work items created within to be able to:

- Be associated with the right business process, department, queue, prioritization schema, and employees. The Genesys system assigns work to the business process in real-time based on employee presence and capacity rules.
- The source systems can optionally assign the due date and priority settings for handling the work item (so called work item prioritization).
- Distribution schema applied to the work items is crucial for both steps above. For example, the business process, department and metadata define needed the skills to handle the work item. Segmentation and prioritization depend on the attributes associated to work items and on business requirements. The following sections describe these attributes or metadata.

Attributes

Work item segmentation and prioritization depend on metadata input from one or more source systems. To apply the segmentation and prioritization within the Genesys system, a set of business attributes (parameters) must arrive from the source system. These attributes captured by the capture event are within the Genesys capture adapter.

The global task list includes work captured. Genesys intelligent Workload Distribution Manager applies segmentation rules to separate work items using core attributes and custom attributes:

- For the work item to pass from the source system, it must be a core attribute. A core attribute is a fixed attribute passed from the source system, otherwise the system rejects (external identifier) it.
- Custom attributes can guide the work item to an employee and reflect in the routing and reporting. At the beginning of the project, generation of the mapping between the source system to Genesys iWD attributes occurs. The business user can manage their environment, once establishing the environment. Screen pops on the agent workspace and segmentation in iWD Manager occur through work item and custom attributes.

For detailed Attribute List for Leads, refer to the respective Leads Attribute List section below:

Business Rules

Business Rules define or mirror both the operating principles and constraints of an organization. A few examples:

- All work items associated with Sales Department and Customer Segment Gold shall be handled within 72 hours.
- If the work item attribute department equals Sales and the Customer Segment equals Gold then the Service Level Agreement (SLA) is 72 hours.

These and finer-grained segmentation rules established in iWD Manager and managed by the business user. The GRE & ORS applications controls the distribution strategy for work items to the desired employees.

iWD Manager uses the attributes from the captured work item to assign the task. It can assign directly to an employee, agent group, combination of skills, or skill proficiency levels. Importance of the work relative to other work items is a key factor that determines prioritization in the global task list. Work in the longest routing status distributes first when there are multiple work items with the same priority targeting the same employees.

The same applies for leads, the priority schema defined within iWD manager is highly flexible and business users can adjust the priority curve to suit their business needs.

In the following sales example, the business value of the lead degrades over time. When a promotion runs for leads that didn't convert within six days, the business user raises the priority between six and eight days after capturing the lead.

Note: In a blended environment, the priority ranges used for leads align with the priority ranges for other media types to ensure the right behavior (distribution order) within the environment. For example, if the employee is answering both phone calls and leads, the sales manager decides that phone calls have a higher priority. The result is voice calls priority starts higher than work items maximum priority. If there is an inflection point where the leads are more important than voice calls, then the prioritization strategy should reflect that. For example, leads within 2 hours of their due date and time are more important than voice calls that are in the queue for 30 seconds.

Business Context and Segmentation

Genesys intelligent Workload Distribution assigns every work item to a business process. Assignment of work items occurs after capture based on the segmentation defined within iWD Manager. The Finance and Sales Departments example shows the split of the processes according to the respective segment, and it reflects the different types of skills and proficiencies. The departments and process names adapt easily according to the changing organization's requirements.

Intelligent Workload Distribution Manager configuration segmentation example table:

Department	Customer Segment	Priority increase scheme	Min priority	Max priority
Finance	Gold	Gold	400	1000
Finance	Silver	Silver	200	1000

Finance	Bronze	Bronze	100	1000
Sales	Gold	Gold	500	2000
Sales	Silver	Silver	200	1000
Sales	Bronze	Bronze	100	400

Unspecified business processes use a default segmentation, prioritization, and distribution scheme.

Priority Schema

The system applies the priority schema to the work item/lead initially after capture and again periodically, according to defined prioritization schema. The reprioritization follows the logic defined below.

Rules define the logic to increase the priority over time by.

- Setting an initial value for the priority
- Setting a priority increment
- Setting the various periods between priority increments
- Setting the due date and time
- Set an overdue priority
- Setting the overdue or at SLA value of the priority

The priority of each work item or lead represents the urgency and business value at that point in the life cycle of the item. The prioritization schema allows a balance of work items representing different Service Level Agreements (SLA). The prioritization allows items of a shorter SLA to increase faster and reach the maximum priority compared with items of equal business value with a longer SLA. The values selected along the graph reflect the different SLAs. In other words, maximum priority culminates with the due date. In a blended environment, priority ranges used for items must broadly align with the priority ranges for other media types to ensure the right behavior (distribution order) within the environment.

As an example, for employees answering phone calls and items, phone calls have priority. The priority of voice calls is higher than items. If there is an inflection point where work items/leads are more important than voice calls, then the prioritization strategy should reflect that. For example, work items/leads within 2 hours of their SLA are more important than voice calls that have waited in queue less than 5 minutes.

Work item/lead life cycle (or) Work item/lead completion - Option 1 in source system and in Genesys

Genesys work items complete via the source system. The logical flow is as follows:

1. The employee completes a work item/lead in the source system.
2. The employee presses "Mark Done" in Genesys to signal that they have finished working on the work item/lead. The employee is then ready for the distribution of their next work item/lead.
3. The source system sends an update via the Capture Adapter to complete the item. If the update does not arrive within a specified timeout, the item goes back into distribution with the same priority. The calculation of priority referenced is in the graph described in the section "Priority Rules." The item going back to distribution ensures that the item avoids a stuck state in the Genesys system. If the employee

accidentally presses "Mark Done" in Genesys, the redistribution of the item takes place.

Work item/lead life cycle (or) Work item/lead completion - Close in source system

Genesys work items complete via the source system. The logical flow is as follows:

1. The employee completes a work item/lead in the source system.
2. The source system sends an update via the Capture Adapter to complete the work item/lead. If this update does not arrive within a specified timeout, the item goes back into distribution with same priority. The priority calculated from the graph described in the section 'Priority Rules'. If the employee accidentally presses "Mark Done", the item goes back to distribution preventing a stuck status in the Genesys system. Disabling the "Mark Done" button within the Genesys agent workspace is an option to prevent this scenario from occurring.

Parking work items/lead in the personal workbin

If an employee is unable to complete the task, they can store it in their personal workbin for later. When they need to access the item, the employee can just pull it from their workbin to continue working on it. The use of workbin is helpful when employees are sick or taking time off. Supervisors manage workbins through the desktop to prevent stuck items in an employee's workbin. Items return to queue or assigned to another team member.

Rescheduling work items/leads

An employee may also need to reschedule a work item/lead, when a customer is available the following day. The source system handles rescheduling and depending on its functionality and integration with Genesys intelligent Workload Distribution. The logical flow is as follows:

1. The employee determines to reschedule a work item/lead.
2. The employee updates the source system, optionally setting an activation date in the source system. Most important, the employee sets the new SLA date and time in the source system.
3. The employee sets Mark Done in the agent workspace. The employee is available to work on the next work item/lead.
4. The source system updates the work item/lead in Genesys with a so-called activation date which is the date set by the employee. Updating the date prevents the item from distributing before the activation date. The work item/lead is prioritized following the logic described above, starting with the activation date. If the activation date fails to set, then the source system updates the work item/lead based on the new SLA.

Reclassifying work items/leads

An employee might also need to reclassify a work item/lead. The source system handles resegmentation which depends on the functionality and integration to Genesys intelligent Workload Distribution

The logical flow is as follows:

1. The employee reclassifies a work item/lead.
2. The employee updates the source system and sets the new date in the source system.
3. The employee sets Mark Done in their agent workspace. The employee is available to work on the next work item/lead.

-
4. The source system updates the work item/lead in Genesys with the new attributes. The process of classification of the work item runs according to the new attributes. The item distributes to an employee with the right skill profile

Leads Attribute List

The attributes used for one or multiple of the following purposes:

- Segmentation (See topic 'Business Context and Segmentation')
- Prioritization (see topic "Priority Rules").
- For display within the agent workspace.

The following table lists the attributes and its purpose which is available as part of this use case.

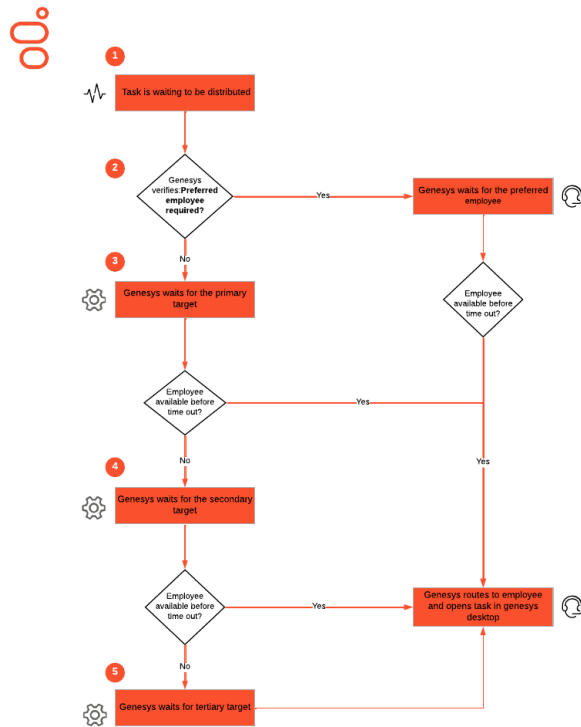
Attribute	Description	Segmentation	Prioritization	Agent Display
External ID	Mandatory ID to identify the lead			X
Contact Number	Contact number to call the customer			X
Alternative Contact Number	Alternative contact number to call the customer			X
Name	Customer Name			X
Surname	Customer Surname			X
Customer Segment	Mapped to a business attribute by the organization	X	X	X
Customer ID	ID to identify the customer in a third-party system			X
Product	To be mapped to a business attribute by the organization	X	X	X
Subproduct	Mapped to a business attribute by the organization	X	X	X
Deal Value	The actual or estimated value of the lead		X	X
Type of Request	Mapped to a business attribute by the organization	X	X	X
Lead Description	A short text to			

Attribute	Description	Segmentation	Prioritization	Agent Display
	provide information to the agent on the lead (max. 30 characters)			

The table focuses on the attributes actively used within the configuration of this use case, however the iWD data model contains a broader list of attributes.

Distribution Flow

The following diagram shows the distribution flow:



Distribution Flow Description

1. Distribution of a work item/lead.
2. If the work item/lead attributes include a preferred employee, Genesys attempts to distribute the work item/lead to this employee until reaching the configurable time-out. The item distributes to its primary target. The primary target defined by all employees with a specific skill or skill level, after the time-out.
3. Genesys expands distribution to the 'reception skill' or a catch-all skill expression, in the event the item fails distribution to the primary target within a configurable time-out.
4. Genesys expands distribution to the tertiary target, in the event the item fails distribution to the secondary target within a configurable time-out.
5. Genesys waits for an employee satisfying the skill/skill level requirements for the expanded target until the work item/lead distributes.

The SLA defines input parameters. Time-out values for the overflow logic are also related to the SLA and defined by SLA. See the topic under 'Priority Rules'.

Distribution Logic

Skill and proficiency-based routing

This use case is provided with a predefined routing strategy that creates all the queues needed to assign a work item/lead to a specific employee. The distribution strategy is based on a series of skill expressions, ensuring that a work item/lead is distributed to the most suitable employee, independent of their location within the organization. The required skill(s) and proficiency levels are defined by the department and process the item belongs to. See "Business Context and segmentation" for the logic to define the Genesys intelligent Workload Distribution department and process. Each employee has one or more skills associated with their profile and a skill level associated to each skill, referred to in this document as proficiencies. The metadata on the work item/lead and the distribution strategy is used to define the primary, secondary, and tertiary targets within the routing logic described below. The targets are defined as follows:

- Primary target = Employees with base skill level > N
- Secondary target = Employees with base skill level > M
- Tertiary target = Employees with base skill level > P

The values for N, M, and P are configurable in iWD Manager and routing strategy based on Department, Process, and metadata attached to the work item.

For example:

- Primary target = Sales Processing > 7 and Legacy System Processing > 1
- Secondary target = Sales Processing > 4
- Tertiary target = Sales Processing > 0

Routing to Preferred Employee

The source system can provide a preferred employee for a work item/lead as work item/lead metadata. In this work item/lead, the distribution logic first attempts to distribute to a preferred Employee. If the work item/lead cannot be distributed to this Employee within a specific time out, routing to the skill is applied. This timeout is configurable as a percentage of the SLA as a global parameter.

Additional Distribution Functionality

The distribution logic supports redistribution or "RONA" functionality. In other words, if an employee does not accept an item distributed to them, the item is routed to another employee after a time out. The first employee is set to not ready. This use case is combined with use cases for different media types. Blending with other media types, including the required configuration of capacity rules, is supported.

User Interface & Reporting

Agent UI

Agent Workspace enables agents (employees) to handle Work Items through the following functionality:

- Work item/ lead processing from Genesys work blending
- Auto or manual answer
- Pop up of the work item / lead in the source system by a URL or by displaying capture ID to manually open a work item / lead in the source system
- Agent Workbins for parking and pulling of work items / leads (Group Workbins not supported in this use case)
- Option to disable "Mark Done" button
- Disposition codes
- Contact History with Universal Contact Server
- Support for Salesforce.com through Gplus Adapter which integrates the Agent Workspace as a tab or floating window (Gplus Adapter supports intelligent Workload Distribution)
- Ability to transfer work items / leads
- Multiple configurable not-ready reason codes (for example: Admin Work, Lunch, Meeting, Pause, RONA, and Training)
- Display of agent, status, and interaction statistics in the Agent Workspace

Reporting

Real-time Reporting

Genesys Pulse enables at-a-glance views of real-time contact center statistics through dashboards and wallboards.

Each Genesys Pulse report presents information within graphical widgets, which show graphs or tables that provide information about incoming voice call queues, agent groups, or individual agents. You can personalize Genesys Pulse reports based on functional, geographical, or organizational considerations.

Genesys Pulse provides templates for the most popular reports. You can use these templates to

quickly add report widgets to your dashboards.

The following Genesys Pulse standard reports are particularly relevant for this use case:

- **IWD Agent Activity** — Displays agent or agent group activity as it relates to the processing iWD work items type contacts.
- **IWD Queue Activity** — Displays an overview of current or near real-time activity associated with the iWD queues.

See [Standard Report Templates](#) for more information.

Note: Genesys Pulse is limited to a 24-hour window, so cannot be used to track work item / lead backlogs over longer periods. Backlog reporting is available through **iWD Manager for cloud**. For more detailed information on the dashboards available within iWD Manager for Cloud, please visit [iWD Manager Dashboard](#) documentation.

Historical Reporting

Genesys CX Insights (GCXI) provides customizable reports and dashboards that can help you track the benefits of this use case by analyzing historical data KPIs that provide intraday tracking of processes, resource performance, and task handling.

Some of the most relevant reports include:

- **Intraday Process Dashboard** — Provides an intraday overview of the completed iWD tasks that were overdue, along with the counts, percentages, and averages of completed iWD tasks, including a breakdown of the average amount of time it took to complete tasks. This dashboard provides visual summaries of the detailed information in the on the [Intraday Process Report](#).
- **Intraday Process Report** — Provides information about the performance of historical and pending work items. Use this report to learn more about sources of backlog, about throughput, and to understand how often tasks become overdue before they are finished. Includes counts of the completed iWD tasks that were overdue, and counts, percentages, and averages of completed iWD tasks, along with a breakdown of the average amount of time it took to complete tasks.
- **Resource Performance Dashboard** — Gives insight into the amount of time and effort resources are spending to resolve work items.
- **Resource Performance Report** — Insight into how resources handle tasks over specific time periods, which can help you gain insight into the the variability of performance for each process, department, and days the resource worked.
- **Task Detail Report** — Provides details about individual work items when viewed from the customer perspective.
- **Task Work Detail Report** — Provides detailed information about tasks that involved more than one employee, and about the queues that distributed the tasks to the employees.
- **Customer Segment Service Level Report** — Provides information about the number of new tasks, number of completed tasks, and the percentage of all tasks that were completed during the reporting interval, by day, by customer segment, and by business process.

See more information, see [Get started with Genesys CX Insights](#) and [Genesys CX Insights reports for iWD Cloud](#).

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	Digital <ul style="list-style-type: none">Genesys Email Routing (CE16)	None

General Assumptions

- Business Calendar attributes are handled in Designer.
- Customizations of the business process are supported through Designer.
- The recommended approach is for the source system to provide the necessary meta data for iWD Manager to perform the classification of the work down to the department and process level.
- If this capability does not exist in the source system, the source system must classify the work down to the Department and Process level.
- Employee capacity rules will be provisioned through Agent Setup.
- Blending of voice, chat, and work item is supported. Agent Setup provisions the capacity rules for employees; for example, the agent will only work on more than media at once (1 voice, 3 chat, 1 email, 2 work items). Routing then handles the delivery of work items based on priority.
- The following known limitations exist in this use case for cloud
 - Genesys Pulse reports and dashboards are generic to the Agents, and not specific to work items. iWD Manager dashboards functionality needs to be used for work item specific realtime reports and dashboards.
 - All work items need to be submitted through the cloud capture point only.
 - No 3rd party WFM support

Customer Responsibilities

- Intelligent Workload Distribution use case with tasks arriving from a source system use a provisioned bi-directional REST capture point.
- The customer handles the Genesys intelligent Workload Distribution integration of the source system.

-
- Any source-system changes needed for the integration with Genesys are within the customer responsibility.
 - The source system must support the update of work items in Genesys intelligent Workload Distribution as required by the work item life cycle (complete, update, pause, resume, cancel, and so on).
 - To enable the functionalities of resegmentation and rescheduling, the source system must support the flow as described above.
 - The work item completed in the source application, so the employee must have access in the source application (BPM/CRM). To enable pop-up of the work item in the source activation, a URL must be available for to Genesys to link with the work item. Otherwise the employee must pull the work item manually.
 - When using preferred employee routing, the work item attributes must specify the same employee (agent) ID as used in Genesys.
 - Work items captured from the BPM have the required minimum fields from the source system to apply segmentation and prioritization rules. The scenarios described above these fields are:
 - External ID - unique ID to identify the work item in the source system
 - Data used to derive the Process and Department for the work item
 - Workspace Web Edition (WWE 9.0) used as the employee and supervisor desktop.
 - Limits to number of departments, processes, and rules as described in "Business Logic".
 - Genesys Pulse and iWD manager used for real-time reporting.
 - Work items appear in this use case as the "workitem" media type.

Related Documentation

Agent Workspace

Agent Workbins, Status, and statistics.

Gplus Adapter Salesforce integration.

- Agent Workspace Workbins
- Workitem handling
- Agent Status
- Statistics
- Gplus Adapter for Salesforce

Workspace Desktop Edition

Agent Workbins, Status, and statistics.

- Workbins
- Workitem handling
- Agent Status
- Statistics

Document Version

- Version **V 1.1.1** last updated **June 13, 2026**