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Genesys Engage On-Premises Use Cases

[Genesys Customer Authentication \(CE07\) for Genesys Engage on premises](#)

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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Use Case Overview

Story and Business Context

In most IVR applications, customers call into companies, such as their credit card company, bank, or cable company, and must manually identify themselves. If the call goes to an agent, customers normally need to identify themselves again to the agent. This is frustrating and time consuming for callers. IVR systems can and should contain self-service to identify the customer automatically based on their caller ID, and this information should then be used throughout the call flow for progressive identification and verification (ID&V), passed as context to a visual session or passed to an agent. This makes customers feel that they want to do business with the company, as their identity is proactively recognized and maintained. For example, as soon as the call connects, a data dip should be completed to identify the customer based on their caller ID. The IVR application can then configure logic to greet the caller by name, skip identification for new self-services within the same call, or skip identification or verification if they move to a visual IVR.

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 | Passing identification and verification from IVR to the agent improves the customer experience. |
| Reduced Handle Time | Automated identification and verification in the IVR reduces agent handling time. |
| 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. |

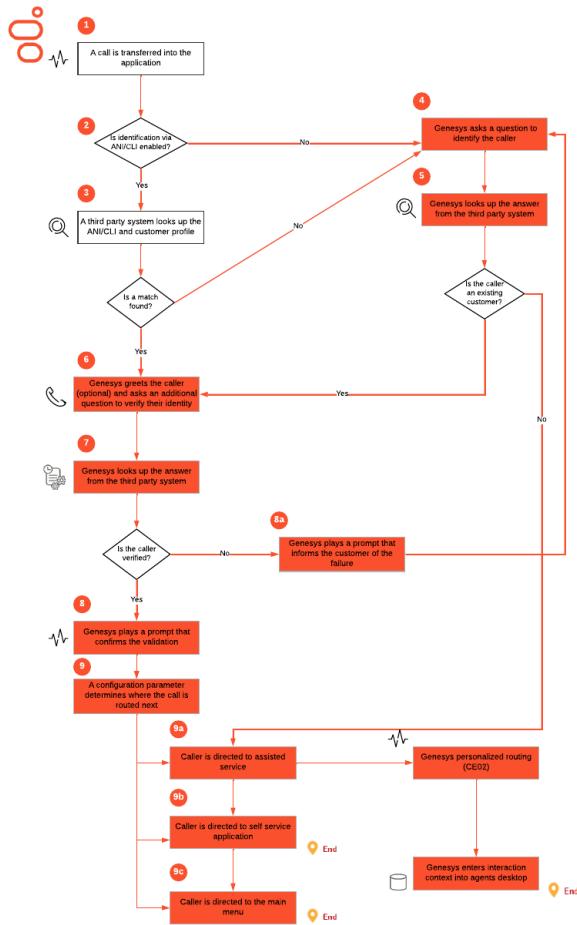
Summary

The IVR system proactively identifies the caller at the beginning of the call. The IVR then asks the caller to identify themselves by entering information to verify their identity. Depending on the business logic configured in the Control Center, the system routes the caller to self-service in the IVR, a main menu, or an agent. If the customer needs to go through another self-service option, the customer's ID&V status persists. This ID&V status also persists if they transfer to a visual IVR and continue their journey there. Finally, if the caller transfers from the IVR to an agent, the system displays the data captured by the IVR to the agent, providing a better experience for both the caller and agent.

Use Case Definition

Business Flow

Figure 1: Example Business Flow



Business Flow Description

1. Call is transferred into the application. This self-service module can be integrated into a broader IVR application that answers the call. At some point the application may decide that Identification and Verification of the customer is required and will initiate the flow of this use case. If ID&V is required then the application initiates the flow of this use case. If the customer has already been identified in a previous channel, transaction or step then it skips this flow. If not it continues to step 3. The broader IVR application is not within the scope of this use case.
2. If enabled, Genesys will identify a customer using the Automatic Number Identification (ANI) / Caller Line Identification (CLI).
3. If ANI / CLI are available, Genesys performs a lookup in the company's database to identify the caller.
4. If identification via ANI / CLI is disabled or fails, Genesys will ask for a separate Identifier (e.g. customer ID, account number, tracking number) to identify the customer. This question must require numeric entry. If the customer does not have the necessary information, Genesys asks the customer to press a specific DTMF tone.
5. The customer input is validated against the customer database.
 - If no match is found, the customer is asked for their identifier, up to a maximum of three times after failure. The number of retry attempts is configurable.
 - If the customer is still not be successfully validated, the customer is forwarded to agent assisted service.
6. If a match is found, Genesys asks for

additional information validating the caller's identity for security purposes. This question must require numeric entry.

- Progressive ID&V, i.e.: higher levels of authentication based on customer profile information and/or requested transaction, occurs during self-service depending on the type of interaction.
- Progressive ID&V is defined in a separate ID&V module and is not within the scope of this use case. The preceding level of authentication should be configurable by a business user in real time should they wish to re-order authentication questions.

7. Genesys looks up and validates the security information entered by the caller within a third party application. If this validation is not successful, the system asks the customer for security information again, up to a maximum of three times after failure.

- If the system cannot successfully validate the customer, the system forwards the customer to agent assisted service.

8. Genesys plays a prompt that confirms the validation or informs the customer of the failure.

9. A configuration parameter determines where the caller should be routed to next. The possible options are listed below. However, these are outside the scope of the ID&V use case:

- Agent assisted service - the result of the identification and verification will be displayed to the agent making both the customer and agent experience better. This functionality requires implementation of the use case .
- Self service IVR such as transfer funds, make a payment.
- Progressive ID&V could occur before self-service depending on the type of interaction. This option would be defined in a separate self-service module outside the scope of this use case.
- IVR main menu for identification of the

type of caller request

Business and Distribution Logic

Business Logic

You can define business logic to govern the ID mechanism, next steps, and voice prompts.

Customer identification by ANI / CLI

Step 3 in the flow above can be enabled or disabled depending on specific customer requirements. If this step is disabled, the flow will always ask for a customer identifier (for example customer ID, account number, or tracking number). This parameter can be set per company service line.

Configuration to define the next steps

After Identification and Verification has been performed successfully, the call will be transferred to the next step of the overall callflow. This might be an agent assisted service, a self-service application or an IVR menu. This parameter can be set per company service line.

Progressive ID&V: Configuration to define preceding authentication question(s) - Configuration can be set from within the ID&V module to give the business user control on the order of authentication questions. The configuration of other ID&V modules that contain these questions are out of scope for this use case.

Omnichannel ID&V: Passing of ID&V token - This authentication use case can be configured to pass an ID&V token from IVR to a visual IVR, so a customer can continue their journey on visual IVR if previously identified.

General: Voice Prompts

The customer can flexibly change all voice prompts within this flow.

Distribution Logic

N/A

User Interface & Reporting

Agent UI

Only available if this use case is used in conjunction with the :

- If the call is transferred to agent-assisted services: The agent will receive an indication whether the customer is

- Identified and verified
- Identified only
- Neither Identified nor verified

Customer identifier and name will be displayed to the agent as well (if available).

Reporting

Real-time Reporting

Users with appropriate permissions are able to follow the interaction journey throughout the IVR. Each step of the IVR process the caller enters (and after, if going to a user or to queue), is identified with time-stamps.

Historical Reporting

Intelligent Automation offers a suite of internal reports details below:

Dashboard

- Application Overview
- System Pulse
- Real-time Graphs

Prebuilt Reports

- Summary
- Calls per Day
- Calls by Time of Day
- Block Results
- Recognition Summary
- Business Task Summary

Customer Journeys

- See what's important to callers
- Monitor the impact of changes
- Compare customer experience
- Data Extracts (CSV format)
- Call Details
- Business Tasks

- GUI Actions
- Inbound SMS

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 | Inbound <ul style="list-style-type: none"> • Genesys Personalized Routing (CE02) | None |

General Assumptions

The use case is supported for Cloud, Premise and Platform as a Service (IVR PaaS) .

For IVR PaaS, Genesys Intelligent Automation is deployed on premise.

- To support PCI or similar compliance, on-premises environments must be architected and configured accordingly
- Genesys Intelligent Automation is a required sellable item.
- As an additional add-on, ASR can be used for the numeric input (see above) and for the phrase "I don't have it" (and synonyms of this phrase) in the flow above.

Customer Responsibilities

- The company has a database that can be used to identify the customer. This database must provide the appropriate web services
- The company provides access to an application to validate the customer identity
- Company must have a unique identifier for their customers
- Complex alphanumeric inputs (for example, check digits) may require custom grammar development - available as optional add-on.

ASR functionality is an optional add-on service for numeric input (see above) and for the phrase "I don't have it" (and synonyms of this phrase) in the flow above.

Related Documentation

Agent Workspace

Agent Workspace enables agents to handle interactions, view Case Data, and transfer calls.

- Agent Workspace v9

Workspace Desktop Edition

Workspace enables agents to handle interactions, view Case Data, and transfer calls.

- Workspace Desktop Edition Help

Document Version

- Version **v 1.1.4** last updated **February 7, 2026**
