Genesys Engage On-Premises Use Cases

Genesys Chat Routing (CE18) for Genesys Engage on premises

9/9/2025

Route chat interactions to the best skilled resource

What's the challenge?

When customers can't find the answers they need on your website, they want to speak with someone who answer their questions in real time. Online consumers prefer web chat over other channels of communication. Failure to offer a live chat option results in lost sales and lower customer experience scores.

What's the solution?

With just a single click, Genesys Chat Routing provides your digital customers immediate access to live help. And because Genesys Chat uses skills-based routing, chat requests can be intelligently routed to the individual best equipped to help.

Other offerings:

Genesys Cloud PureConnect

Contents

Use Case Overview

Story and Business Context

The web chat channel has become an invaluable tool in communicating with and engaging with customers to provide better service for answering questions, completing orders, general guidance on company's product and features, and personalized customer support. With this solution, Genesys can improve handle time, first contact resolution, agent utilization, and customer satisfaction.

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 Employee Utilization	Improved agent occupancy due to Asynchronous and long-lived Chat Sessions.
Improved First Contact Resolution	Improved First Contact Resolution by routing interactions to an expert through skills based routing
Increased Revenue	Routing revenue-generating opportunities to best resources through skills based routing increases revenue
Reduced Handle Time	Routing chats to the right skilled agents through skills based routing reduces handle time

Summary

The customer can request a chat session with an agent from the company's web site on a specific topic. The request is routed to the best available agent depending on the subject and the agent skill. The agent will be provided with the customer context (requested subject).

Use Case Definition

Business Flow

The following flow describes the use case from the perspective of the main actors, i.e. the customer and the contact centre agent.

The following diagrams shows the business flow of the use case:
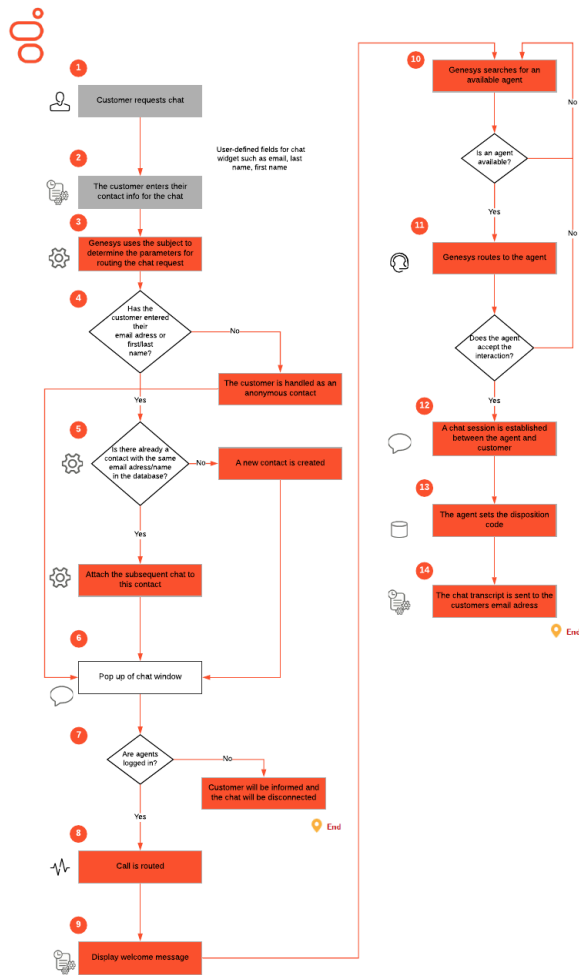
Business Flow Description

1. The customer requests to chat with a live agent via the web page.

2. Customer enters his data via a registration window. The data he can enter are: Last name, first name, nickname, subject and e-mail address.

3. Genesys uses the subject to determine the parameters for routing of the chat request (see chapter "Distribution logic").

4. Genesys will check if last and first name is available from the customer

   - If the customer has not provided the information on first and last name the chat session will not be associated to any contact and no transcript will be saved or e-mailed to the customer.

5. If the customer has entered his e-mail address, Genesys will search for the customer in the contact history. If no contact with the same e-mail address is available, Genesys will create a new contact. The current chat session will be associated to this contact and the chat transcript will be stored under this contact.

6. The chat window will pop-up.

7. Genesys checks if agents are logged in for the requested subject.

   - If no agents are logged in at all for the service chat is disconnected and customer is getting a disconnect message.

8. If agents are logged in for the service, routing takes place.

9. The customer gets a welcome message from Genesys system. Welcome text may depend on the subject.

10. Genesys will search for an available chat agent. If no agent is available the chat interaction will be queued (see chapter "Distribution Logic" for the queuing logic)

    - until an agent becomes available. Comfort messages may be sent to the customer during wait time

    - customer ends the chat session (the

Business and Distribution Logic

Business Logic

Business logic and rules determine the distribution of chat requests and the standard responses agents can use. Distribution depends on a combination of agent skill and availability.

Distribution logic

The following table shows the parameters, which can be configured, based on the subject:

business flow ends)

- final timeout is reached, chat is ended and the customer is informed (the business flow ends)

11. When the chat request is routed to an agent, he can either accept or ignore the chat interaction. If he does not accept the interaction, Genesys will attempt to route to another agent after a specific time out. The first agent will be set to not ready (RONA). Continue at step 9.

12. If he accepts, the chat session between the agent and the customer is established. The agent can use standard responses based on the subject for the chat interaction with the customer.

13. When the chat session is finished the agent can set a disposition code to register the outcome of the chat for reporting purposes.

14. If the customer has provided his e-mail address during the registration process, he will receive a transcript of the chat session via e-mail (optional).

Parameter	Description	
Skill		Required agent skill for distribution of the chat message
Min Skill level 1		Required minimal skill level for the first target group of agents
Max Skill level 1		Required maximal skill level for the first target group of agents
Time out 1		Time out for waiting for the first target group. If skill level 2 is not configured, the interaction will be disconnected after time out 1
Min Skill level 2 (Optional)		Required minimal skill level for the second target group of agents
Max Skill level 2 (Optional)		Required maximal skill level for the second target group of agents
Time out 2 (Optional)		Time out for waiting for the second target group. If skill level 2 is not configured, the interaction will be disconnected after time out 2
Min Skill level 3 (Optional)		Required minimal skill level for the third target group of agents

Parameter	Description	
Max Skill level 3		Required maximal skill level for the third target group of agents
Time out 3 (Optional)		Time out for waiting for the third target group. The chat interaction will be disconnected after the configured time out has been reached
Disconnect Message (no agents) (Optional)		This message will be displayed to the customer when no agents are logged in for his service
Welcome message (Optional)		This message will be displayed to the customer when the chat session is started
Disconnect Message (final time out) (Optional)		This message will be displayed to the customer in case the final time out is reached
Comfort message 1 (Optional)		This message will be displayed to the customer after the first time out is reached
Comfort message 2 (Optional)		This message will be displayed to the customer after the second time out is reached
Chat transcript?		Enable that chat transcripts are sent if the customer has provided his e-mail address

Standard responses

The workspace will display suggested responses to the agent based on the chosen subject. Genesys will prepare the possibility to associate a specific subject with suggested responses using examples. The standard responses will need to be provided by the customer.
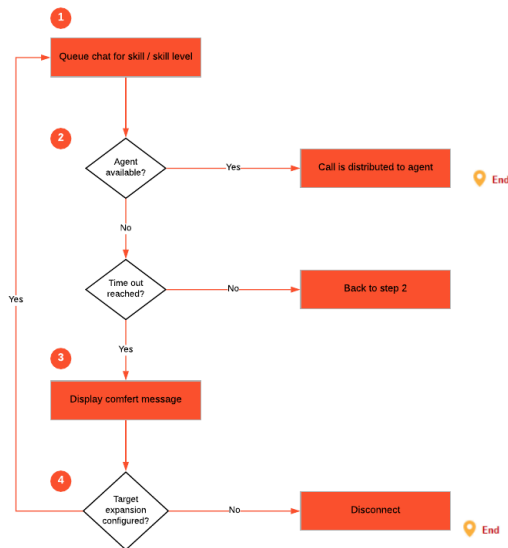
Distribution Flow

Then following diagram shows the distribution logic, which will be implemented in case the chat interaction, needs to queue for an agent:

Distribution Logic

Operational hours

The following information can be configured to inform the customer if the contact center is out of operational hours once he initiates a chat request:

- Emergency Flag: If this flag is set, a special message is sent to inform the customer about the condition
- Special Days: Special Days (e.g. public) holidays can be configured, in which the contact center is not operational. If a customer requests a chat on a special day, a corresponding message will e sent to him.
- Operational Hours: If the customer requests a chat outside of the operational hours, a special message

will
be **Distribution Flow Description**

1. The system will queue the chat request.

2. Once an agent with the required skill / skill level becomes available, the chat will be distributed to the agent.

3. If it cannot be distributed before the timeout, a comfort message can be sent automatically to the customer.

4. The potential pool of agents can be expanded via expanding the requested skill levels. The system will wait for an agent until a second timeout is reached. If the timeout is reached, a second comfort message can be sent automatically to the customer. Up to two expansions/comfort messages can be configured.

sent to him.

Additional Functionality

The following lists additional functionality for the distribution logic:

- At every step above the distribution logic will look for agents with the requested skill and a skill level within the boundaries of a maximum and a minimum required skill levels.

- The skill, minimum and maximum skill levels and timers will be configurable by subject (see chapter "Business Logic"). The second and third target are optional.

- Re-route on no answer (RONA) - functionality: If an agent does not accept the chat interaction, the chat interaction will be automatically put back into the distribution flow after a time out. The agent will be set to not-ready.

- Blending with other media types will be possible. Priority settings for chat interactions will be configurable to enable proper priority ranges between different media types. Capacity rules will be configured for the agents / agent groups to define what interactions can be handled in parallel (if any).

User Interface & Reporting

Agent UI

The following lists the minimum requirements for the chat interface:

- Access to Universal Contact History
- Configuration of not-ready reason codes (for example: Admin Work, Lunch, Meeting, Pause, RONA and Training).
- Configuration of disposition codes to report on business outcome (for example: Cross Sell, Need Follow-Up, Not Right Skill, Processed, Terminated, Transferred, Up Sell)
- Access to standard response library
- Setting Threshold Alarm to alarm agents on pending responses for chat
- Agent to agent transfer
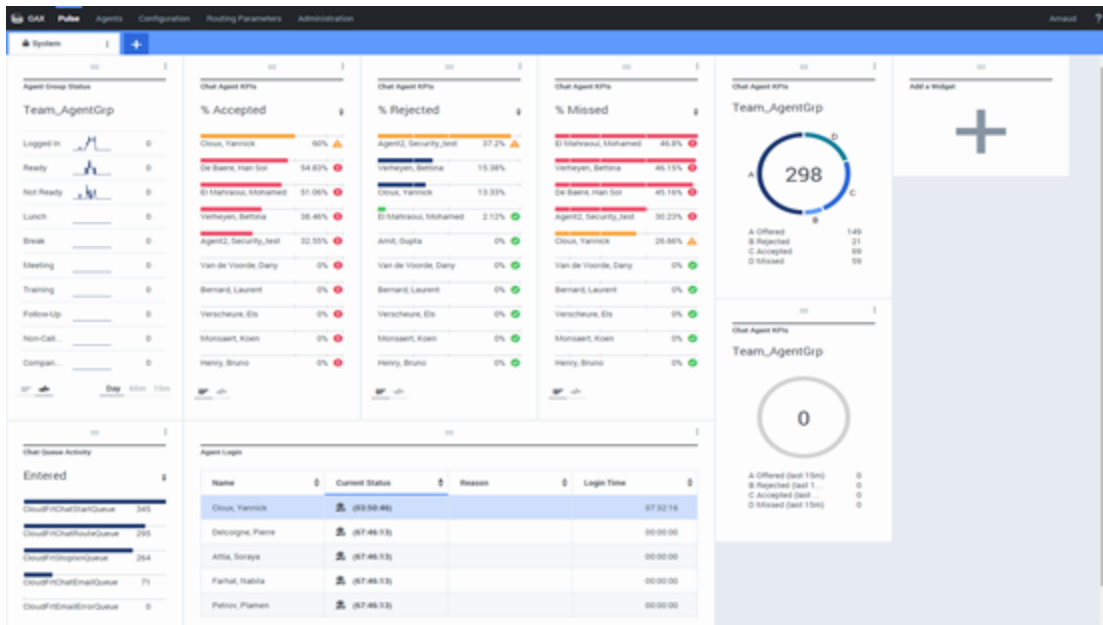
Reporting

Real-time Reporting

Premise

Pulse is a Genesys Administrator Extension (GAX) plug-in application that offers personalized dashboards based on specific functional, geographical or organizational needs. Pulse dashboards present information using graphical "widgets" that can be viewed as graphs or tables, showing information about specific key performance indicators, such as service level, chat interaction handled and the average handle time. With Pulse you can:
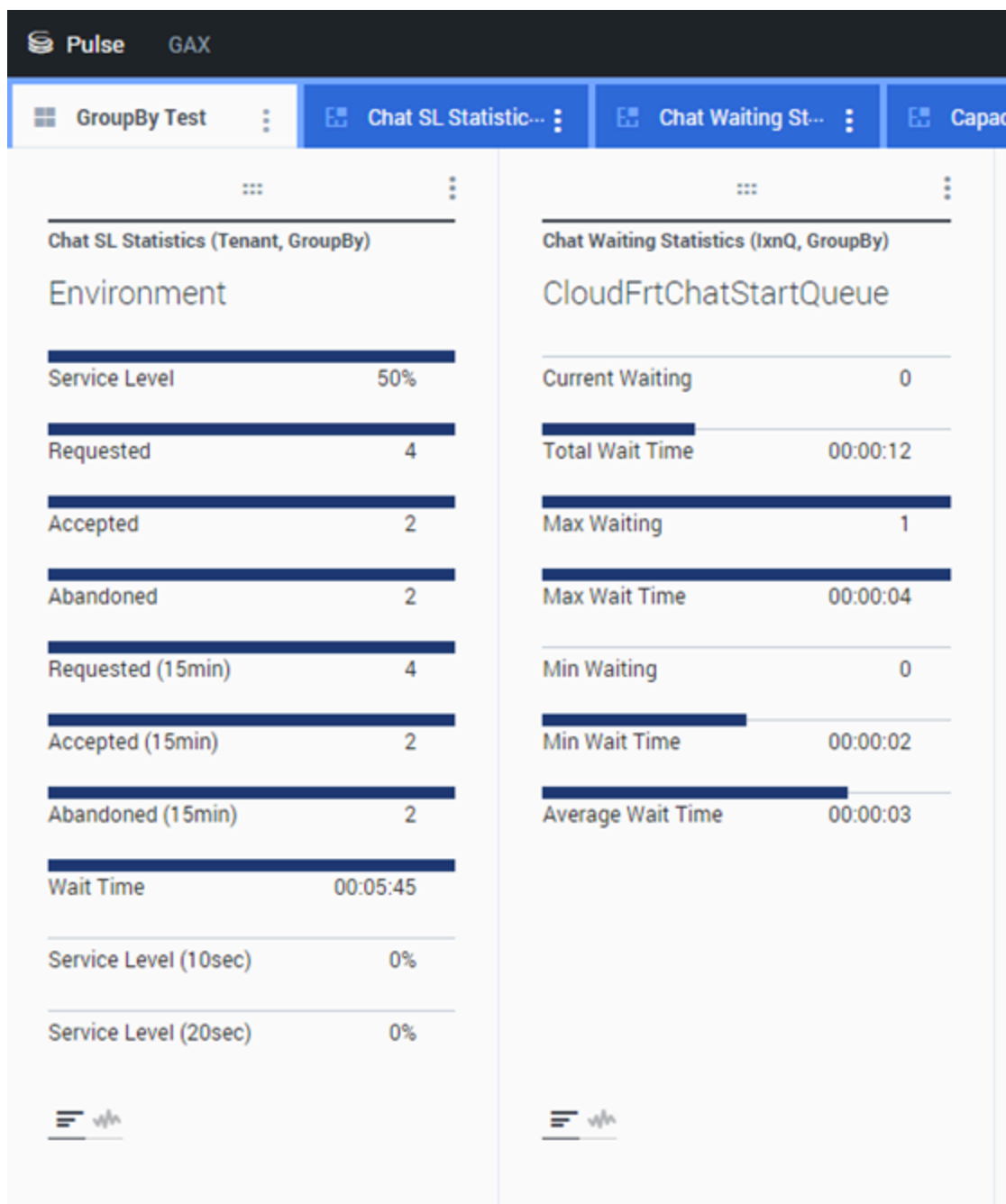
- Monitor the current state and activity of Contact Center objects to help make decisions about staffing, scheduling and call routing strategies.
- Create widgets from predefined and user-defined templates for a fast and easy text or graphical presentation of selected or user-defined object statistics.
- Predefined templates
  - Monitor operational Chat activity through the Chat Queue Activity template.
  - Monitor Agent resource activity through the Chat Agent Activity template
  - Monitor Tenant Service Level through the Chat Service Level template.

Below are several examples of Chat dashboards, implementation of dashboards would be customized based on the deployment.

Example 1:

Example 2:

Example 3:

Example 4:

Cloud

Due to the continuous evolution, the features available in Cloud rapidly change. Please reach out to your local Cloud Team for latest information.

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 illustrate the routing and handling of interactions and measure the effectiveness of the engagement rules and efficiency of the use case.

Some of the most relevant reports that are useful to measure the effectiveness of the engagement rules and efficiency of the use case are found in the Chat folder, such as:

- Asynchronous Chat Dashboard — Use this dashboard to view detailed information about asynchronous chat sessions in the contact center. Asynchronous (Async) chat sessions are single chat sessions between a customer and a contact center that last for a long period of time (potentially several days). Agents can return a chat session back into the workflow (into a dormant state), and then reconnect to the session later.

- Chat Engagement Report — Learn more about the number of chat engagements agents had, and the duration of each. Sessions can contain more than one *engagement*; each engagement represents an agent's participation in that part of a session.

- Chat Message Statistics Report — Learn more about how chat is used in the contact center.

- Chat Session Report — Learn more about the volume of chat sessions handled in your contact center within a specific time period, including details about the number of messages within chat sessions, and about how often chat sessions were missed or transferred.

- Chat Termination Report — Use this report to learn more about how interactions were terminated; whether by the client, by the agent, due to inactivity, or for some other reason.

- Interaction Acceptance Dashboard — Understand how long it takes for agents to accept customer interactions, and to identify what percentage of interactions are accepted promptly, or with some delay.

- Interaction Acceptance Report — View statistics about the acceptance of interactions by agents, including the amount of time it takes for agent to accept interactions, and the number and percentage of interactions that were accepted quickly, or with a delay.

- Pre-Agent Termination Report — Learn more about calls that terminated before connecting to an agent.

Other reports relevant to this use case include:

- Interaction Handling Attempt Report — Explore segment-related details with regard to an agent's handling of contact center interactions that are stored in the Info Mart INTERACTION_RESOURCE_FACT table, including both the time that was required to distribute the interaction to the agent, and data about the agent's contiguous participation in the interaction.

For more information about Genesys CX Insights and other reports/dashboards, see the *Genesys CX Insights 9.0 User's Guide*.

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

- Implementation of this use case will be based on the Digital Blueprint Architecture

- Genesys Infomart and Interactive Insights in place for historical reporting

- WDE or WWE will be used as agent workspace

- Pulse will be used for real-time reporting

- Use of Genesys CX widget with limited modification to the company's corporate identity as described in chapter "User Interface Requirements".

- No integration with third party systems

Customer Responsibilities

- Genesys customer will handle the integration of the solution into his web site,

- Provision and configuration standard responses in Genesys Knowledge Manager

Related Documentation

Agent Workspace

Agent Workspace enables agents to handle chat interactions.

- Chat interactions
- Standard Responses
- Customer and interaction history

Workspace Desktop Edition

Workspace enables agents to handle chat interactions.

- Chat interactions
- Standard Responses
- Customer and interaction history

Document Version

- Version **V 1.0.3** last updated **September 10, 2025**