Genesys Engage On-Premises Use Cases

Genesys Click-to-Call (CE21) for Genesys Engage on premises

2/17/2026

Enable click-to-call from your website or app to improve service and conversions

What's the challenge?

When customers need more information while on your website or mobile app, they want to speak with a well-informed individual who can provide real-time assistance. Having to search for numbers and take steps back when connected to a sales representative results in lost sales, lower customer experience scores and makes them less likely to buy.

What's the solution?

Connect your customer to the help they need from within the web site or mobile app, making it easy to obtain service, buy and improve campaign results. By using skills-based routing and context, calls can be intelligently routed to the individual best equipped to help. Create a seamless experience to improve revenue and brand loyalty.

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Use Case Overview

Story and Business Context

Customers or prospects often begin their customer service or sales journey on a company's website before placing a call. By presenting each website visitor with a dynamically-generated phone number and optionally an access code, you can use contextual information from the website visit such as the current web page, cookies, and/or customer information for routing and reporting purposes, and make it available to the employee who handles the call.

Where the call is made from a mobile device, information about the device location can also be used to personalize the treatment of the call and display the caller's location to the agent on a map, for example to guide a customer to a local branch or store.

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	Provide a more customer-friendly experience that requires less effort. Hot prospects can bypass IVR menus to be routed directly to the best-fit sales reps, who can use the context of website visits to provide a better customer experience.
Improved First Contact Resolution	Connect the customer to the best-skilled agent to improve first contact resolution.
Increased Revenue	Direct interactions to revenue-generating activities. Context from website visits is used to prioritize sales-related calls and route them to the reps best suited to handling them.
Reduced Handle Time	Customers experience reduced handle time through callback as agents receive associated interaction context. Context from website visits reduces handle time for employees and allows them to focus attention on the prospect.

Summary

Customers or company website visitors on desktop and mobile devices are presented with a dynamically-generated phone number. When a call is received on one of these phone numbers, the system retrieves context information from the website visit for use in routing and reporting on the call, and to provide context to the employee who handles the call. Where the website visit originates on a mobile device, the location of the device can also be used in routing and reporting, and the device location can be displayed on a map for the sales rep.

This use case enables a company to offer its customers a specific phone number to call, which

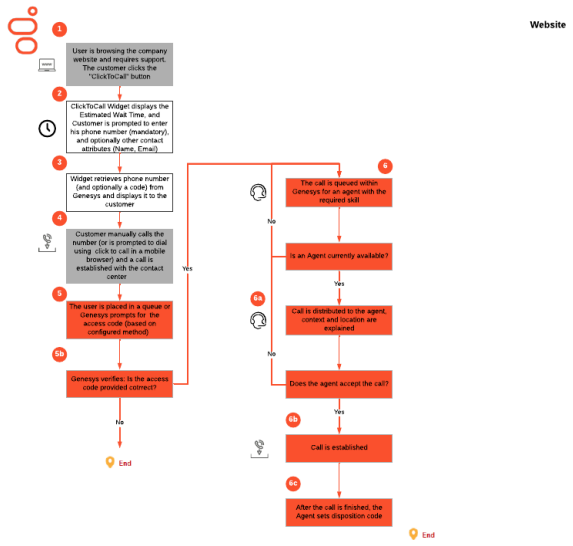
provides routing to the best agent based on the context of their request. This "click-to-call" capability applies only when the customer manually dials the number or is prompted to click-to-dial on a mobile phone. In other words, no media transport such as WebRTC is provided as part of this use case.

Use Case Definition

Business Flow

(1) Business Flow - Website

The following flows describe the use case from the perspective of the main actors, such as a user or customer and a contact center agent, the first a request from a website, the second a request from a mobile application.



Business Flow Description

1. A customer is browsing the company's website or mobile site and requires help. The customer decides to call the contact center and clicks the “ClickToCall” button. Optionally, the customer can click a Channel Selector Widget that shows available channels. If Estimated Wait Time is above the configurable threshold, the ClickToCall button is not accessible.
2. ClickToCall Widget displays the Estimated Wait Time, and the customer is prompted to enter their phone number (mandatory) and optional contact attributes such as Name and Email.
3. The website retrieves a dynamic phone number related to the current web page and displays that to the customer.
4. The customer manually dials the number (or could be prompted to dial the number using click-to-call in a mobile browser), and a call into the contact center is established.
5. Depending on the configured method for matching the interaction, one of the following occurs:
   - DNIS Pool: The user is placed into a queue.

- Access Code: The website displays an access code and Genesys prompts the caller to enter the access code while on the phone call. If the customer does not enter the correct code after multiple attempts, a corresponding message is played and the call is disconnected. Note: this approach has licensing and development requirements.

6. The call is queued within the Genesys system according to the distribution logic described below and delivered to agents with the skill corresponding to the requested subject.
   - If the agent accepts the call, the call is established and the following information is displayed in the agent desktop: Subject based on DNIS, Customer ID, First Name, and Last Name (as available).
   - If the agent does not accept the call, the call is sent back to the queue and the agent is set to not ready (RONA – redirect on no answer).
   - After the call is finished, the agent sets a disposition code to record the call outcome for reporting purposes.

Business Flow

(2) Business Flow – Mobile App

This flow assumes that the user has activated geo-location and push notifications on his smartphone for the company's app.

Business and Distribution Logic

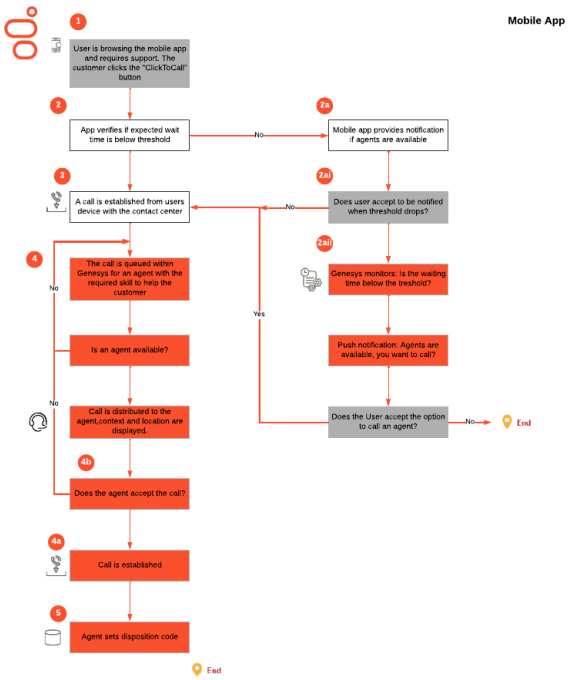
Business Logic

Assign skill based on subject

The agent skill required for a specific call depends on the call origination. Up to four subjects are standard; any additions require customization. This logic needs to be defined based on the DNIS number for incoming interactions.

Assign priority based on subject

Different priorities can be assigned for different subjects. Three priority values are defined per subject based on the status of the call (Initial, Overflow, or RONA).



Business Flow Description

1. A customer is browsing the company's mobile application and requires help. The customer decides to call the contact center and clicks the “ClickToCall” button. The mobile application and related functionality is not within the scope of this use case, but will be provided by the company. Genesys can provide sample applications for iOS and Android.
2. The application retrieves the expected wait time for an agent with skills corresponding to the page and determines whether the time is within the acceptable threshold. If the wait time is above the configured threshold, the app informs the customer and offers to notify him via push notification once an agent becomes available. For customers who do not have push notifications enabled, it is recommended to offer them the ability to activate push notifications for improved service. This functionality is within the application logic and not provided by Genesys.
    - If the customer does not want to wait to be notified, the call to the contact center is established from his mobile device.
    - If the customer agrees to be notified, a push notification is sent to the customer when an agent becomes available. If the customer declines the push notification, the flow ends.
3. The mobile app retrieves the customer details, then establishes a call from the customer’s mobile device to the contact center.
4. The call is queued within the Genesys system according to the distribution logic described below and delivered to an agent with the skill corresponding to the requested subject.
    - If the agent accepts the call, the call is established, and the following information is displayed in the agent desktop: Subject based on DNIS, Customer ID, First Name, and Last Name (as available), plus a new tab for Mobile Details, including a map with the

Distribution Logic

The following lists the minimum requirements for distributing a call generated from the website to agents:

- Skill-based routing
- RONA (redirect on no answer)
- Call flow logic: Up to three expanding targets with configurable timeout based on skill level. Optionally, one external overflow number outside the control of Genesys can be configured; however, in this case the call context is lost. The timeouts, skill level, or external numbers in this call flow logic are configurable per subject (four are included as standard).

customer's current location.

- If the agent does not accept the call, the call is sent back to the queue and the agent is set to not ready (RONA – redirect on no answer).

5. After the call is finished, the agent sets a disposition code to record the call outcome for reporting purposes.

See additional technical information on this use case in the Genesys Mobile Engagement help.

User Interface & Reporting

Agent UI

The following lists the minimum functionality for the agent interface:

- Configuration of Not Ready reason codes (such as Admin Work, Lunch, Meeting, Pause, RONA, Training). Current Genesys customers can reuse the existing Not Ready reason codes.
- Display of Subject, Customer ID, First Name, Last Name (as available from the website).
- Dedicated tab for Mobile Details, current address, and Google map (if available) – for mobile app

Reporting

Real-time Reporting

Leverage standard reporting for voice in Pulse for reporting on calls generated via Genesys Mobile Engagement. Each subject is available as a dimension in the relevant reports.

Historical Reporting

Leverage standard out-of-the-box callback reports in CX Insights. Use **Callback Summary Report** for detailed information about callbacks that were processed by the contact center, allowing you to analyze callback performance based on nearly thirty metrics, including:

- Total number of accepted, declined, attempted, connected, cancelled, abandoned, and successful callbacks.
- Percentages of callbacks that were successful, unsuccessful, declined, or connected.
- Savings resulting from callbacks, including the total amount time and money saved and the average time and money saved per callback.

- The number of attempts made to complete callbacks, the time customers spent waiting for an agent, and time customers waited before abandoning a call.

Use **Callback Detail Report** for detailed information about callbacks that were processed by the contact center, allowing you to analyze callback performance based on nearly 30 metrics. Use this report to view a detailed picture of how Callback is used in your contact center, including information about the volume of callback calls, success rates, resulting savings, and customer wait times.

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

This use case makes the following assumptions:

- All inbound voice calls are routed via Genesys.
- Workspace Desktop Edition or Workspace Web Edition are used as the agent desktop.

Mobile App-Specific

The customer is responsible for:

- Providing geo-location information from the app to the Genesys Mobile Services API.
- Securing a subscription to the Google API, which is necessary for Google to support every agent getting a screen pop with a Google Map in this way.
- Supplying the push provider configuration as well as Apple Push Notification Service (APNS) and Google's Firebase Cloud Messaging (FCM) certificates and credentials for push notifications.

Customer Responsibilities

- The customer is responsible for all aspects of the website or mobile app, including development of the logic and the integration with Genesys.
- Pulse is used for real-time reporting.
- Genesys Infomart and Interactive Insights are used for historical reporting.

- No integration with third-party systems.
- Customers need to update/provide scripting to make REST calls into GMS through the web page associated with click-to-call feature.

Mobile App-Specific

The customer is responsible for:

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Document Version

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