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PureConnect Use Cases

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Explore all PureConnect use cases. See the first tab (**All**) for a full list of use cases, or filter by product category.

All

Sort or search the table to find the use case you want to view, then click the title.

ID	Title	Product Category	Subtitle
ID	Title	Product Category	Subtitle

"> BO02 Genesys Work and Lead Distribution Digital Optimizing work distribution across the enterprise to deliver all promises on time"> BO07 Genesys KPI Insights Inbound Monitor and analyze interaction data to detect addressable service level anomalies"> BO11 Genesys Dynamic Case Management Digital Combine Genesys Omnichannel customer experience with Dynamic Case Management to support human-centric automation, continuous innovation and transformation."> CE01 Genesys Call Routing Inbound Route voice interactions to the best skilled resource"> CE02 Genesys Personalized Routing Inbound Apply personalized routing to voice interactions"> CE03 Genesys Callback Inbound Offer callback to queuing callers"> CE07 Genesys Customer Authentication Self-Service and Automation Identify and verify customers in your IVR"> CE08 Genesys Voice Payment Self-Service and Automation Capture payments in your IVR"> CE09 Genesys IVR Personalization Self-Service and Automation Increase self-service by personalizing your IVR"> CE11 Genesys Outbound Dialer Outbound Improve customer communications and increase sales conversion using powerful dialer capabilities"> CE16 Genesys Email Routing Digital Route email interactions to the best skilled resource"> CE18 Genesys Chat Routing Digital Route chat interactions to the best skilled resource"> CE19 Genesys Social Media Routing Digital Engage with your customers through social channels"> CE22 Genesys Digital Callback Digital Enable customers to request a callback from your website or app"> CE29 Genesys SMS Routing Digital Route SMS interactions to the best resource"> CE31 Genesys Chatbots Self-Service and Automation Use chatbots to automate customer conversations and seamlessly hand over to a chat agent when needed."> CE37 Genesys Predictive

Engagement Digital Use AI powered journey analytics to observe website activity, predict visitor outcomes, and proactively engage with prospects and customers via agent-assisted chat, content offer or chatbot."> CE41 Genesys Voicebots Self-Service and Automation Use voicebots to automate customer conversations and seamlessly hand over to an agent if needed."> EE01 Genesys Workforce Scheduling for Voice Workforce Engagement Optimize employee utilization for voice interactions"> EE02 Genesys Omnichannel Workforce Scheduling Workforce Engagement Optimize employee utilization for all digital interactions"> EE03 Genesys Shrinkage Management Workforce Engagement Improve operational effectiveness by better managing agent non-working time"> EE07 Genesys Voice Recording Workforce Engagement Record voice interactions"> EE08 Genesys Voice and Screen Recording Workforce Engagement Record voice and screen interactions"> EE09 Genesys Quality Management Workforce Engagement Improve employee performance with quality management"> EE10-A Genesys Employee Schedule Preferences Workforce Engagement Empower employees with self-administration of their schedule"> EE10-B Genesys Employee Schedule Preferences Workforce Engagement Empower employees with self-administration of their schedule"> EE10-C Genesys Employee Schedule Preferences Workforce Engagement Empower employees with self-administration of their schedule"> EE10-D Genesys Employee Schedule Preferences Workforce Engagement Empower employees with self-administration of their schedule"> EE11 Genesys Shift Bidding Workforce Engagement Empower employees to influence their schedules"> EE22 Genesys Speech Analytics Workforce Engagement Gain basic insight into voice interactions using speech analytics"> EE23 Genesys Advanced Text and Speech Analytics Workforce Engagement Achieve deeper operational insights with speech and text Analytics"> EE24 Genesys Text and Speech Analytics for Customer Service Workforce Engagement Mine call recordings for insights to improve agent and customer experiences"> EE25 Genesys Text and Speech Analytics for Compliance Workforce Engagement Enforce compliance and legal responsibilities with speech and text analytics"> OP01 Genesys Business Communications Open Platform Simplify contact center and business communications

Digital

Sort or search the table to find the Digital use case you want to view, then click the title.

Use Case	Subtitle
Use Case	Subtitle

"> Genesys Work and Lead Distribution (BO02) Optimizing work distribution across the enterprise to deliver all promises on time"> Genesys Dynamic Case Management (BO11) Combine Genesys Omnichannel customer experience with Dynamic Case Management to support human-centric automation, continuous innovation and transformation."> Genesys Email Routing (CE16) Route email interactions to the best skilled resource"> Genesys Chat Routing (CE18) Route chat interactions to the best skilled resource"> Genesys Social Media Routing (CE19) Engage with your customers through social channels"> Genesys Digital Callback (CE22) Enable customers to request a callback from your website or app"> Genesys SMS Routing (CE29) Route SMS interactions to the best resource"> Genesys Predictive Engagement (CE37) Use AI powered journey analytics to observe website activity, predict visitor outcomes, and proactively engage with prospects and customers via agent-assisted chat, content offer or chatbot.

Self-service and automation

Sort or search the table to find the Self-Service and Automation use case you want to view, then click the title.

Use Case	Subtitle
Use Case	Subtitle

"> Genesys Customer Authentication (CE07) Identify and verify customers in your IVR"> Genesys Voice Payment (CE08) Capture payments in your IVR"> Genesys IVR Personalization (CE09) Increase self-service by personalizing your IVR"> Genesys Chatbots (CE31) Use chatbots to automate customer conversations and seamlessly hand over to a chat agent when needed."> Genesys Voicebots (CE41) Use voicebots to automate customer conversations and seamlessly hand over to an agent if needed.





Inbound

Sort or search the table to find the Inbound use case you want to view, then click the title.

Use Case	Subtitle
Use Case	Subtitle

"> Genesys KPI Insights (BO07) Monitor and analyze interaction data to detect addressable service level anomalies"> Genesys Call Routing (CE01) Route voice interactions to the best skilled resource"> Genesys Personalized Routing (CE02) Apply personalized routing to voice interactions"> Genesys Callback (CE03) Offer callback to queuing callers



Outbound

Sort or search the table to find the Outbound use case you want to view, then click the title.

Use Case	Subtitle
Use Case	Subtitle

"> Genesys Outbound Dialer (CE11) Improve customer communications and

increase sales conversion using powerful dialer capabilities



Workforce engagement

Sort or search the table to find the Workforce Engagement use case you want to view, then click the title.

Use Case	Subtitle
Use Case	Subtitle

"> Genesys Workforce Scheduling for Voice (EE01) Optimize employee utilization for voice interactions"> Genesys Omnichannel Workforce Scheduling (EE02) Optimize employee utilization for all digital interactions"> Genesys Shrinkage Management (EE03) Improve operational effectiveness by better managing agent non-working time"> Genesys Voice Recording (EE07) Record voice interactions"> Genesys Voice and Screen Recording (EE08) Record voice and screen interactions"> Genesys Quality Management (EE09) Improve employee performance with quality management"> Genesys Employee Schedule Preferences (EE10-A) Empower employees with self-administration of their schedule"> Genesys Employee Schedule Preferences (EE10-B) Empower employees with self-administration of their schedule"> Genesys Employee Schedule Preferences (EE10-C) Empower employees with self-administration of their schedule"> Genesys Employee Schedule Preferences (EE10-D) Empower employees with self-administration of their schedule"> Genesys Shift Bidding (EE11) Empower employees to influence their schedules"> Genesys Speech Analytics (EE22) Gain basic insight into voice interactions using speech analytics"> Genesys Advanced Text and Speech Analytics (EE23) Achieve deeper operational insights with speech and text Analytics"> Genesys Text and Speech Analytics for Customer Service (EE24) Mine call recordings for insights to improve agent and customer experiences"> Genesys Text and Speech Analytics for Compliance (EE25) Enforce compliance and legal responsibilities with speech and text analytics





Open Platform

Sort or search the table to find the Open Platform use case you want to view, then click the title.

Use Case	Subtitle
Use Case	Subtitle

"> Genesys Business Communications (OP01) Simplify contact center and business communications

PureConnect Use Case Benefits

This page lists all PureConnect business benefits and the corresponding use case documents that help realize those benefits.

- Improved Agent Competency
 - Improved Containment Rate
 - Improved Conversion Rates
 - Improved Customer Experience
 - Improved Employee Productivity
 - Improved Employee Utilization
 - Improved First Contact
- Resolution
- Improved Insights and Visibility
 - Increased Contact Rate
 - Increased Response Rates
 - Increased Revenue
 - Reduced Administration Costs
 - Reduced Customer Churn
 - Reduced Deployment Costs
 - Reduced Employee Attrition
- Reduced Handle Time
 - Reduced Interaction Abandonment
 - Reduced Interaction Transfers
 - Reduced IT Operational Costs
 - Reduced Penalties and Fines
 - Reduced Transfers
 - Reduced Volume of Interactions



Improved Agent Competency

- Genesys Voice and Screen Recording
- Genesys Quality Management



Improved Containment Rate

- Genesys Customer Authentication
- Genesys IVR Personalization
- Genesys Chatbots
- Genesys Voicebots



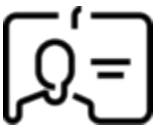
Improved Conversion Rates

- Genesys Outbound Dialer
- Genesys Predictive Engagement



Improved Customer Experience

- Genesys Work and Lead Distribution
- Genesys Dynamic Case Management
- Genesys Call Routing
- Genesys Personalized Routing
- Genesys Callback
- Genesys Customer Authentication
- Genesys Voice Payment
- Genesys IVR Personalization
- Genesys Email Routing
- Genesys Social Media Routing
- Genesys Digital Callback
- Genesys Chatbots
- Genesys Predictive Engagement
- Genesys Voicebots
- Genesys Voice and Screen Recording
- Genesys Quality Management



Improved Employee Productivity

- Genesys Predictive Engagement



Improved Employee Utilization

- Genesys Work and Lead Distribution
- Genesys Dynamic Case Management
- Genesys Personalized Routing
- Genesys Callback
- Genesys Outbound Dialer
- Genesys Email Routing
- Genesys Chat Routing
- Genesys Social Media Routing
- Genesys Digital Callback
- Genesys SMS Routing



Improved First Contact Resolution

- Genesys KPI Insights
- Genesys Call Routing
- Genesys Callback
- Genesys IVR Personalization
- Genesys Email Routing
- Genesys Chat Routing
- Genesys Social Media Routing
- Genesys Digital Callback
- Genesys Chatbots
- Genesys Voicebots



Improved Insights and Visibility

- Genesys Dynamic Case Management



Increased Contact Rate

- Genesys Outbound Dialer



Increased Response Rates

- Genesys Dynamic Case Management



Increased Revenue

- Genesys Work and Lead Distribution
- Genesys KPI Insights
- Genesys Call Routing
- Genesys Personalized Routing
- Genesys Voice Payment
- Genesys Chat Routing
- Genesys Social Media Routing
- Genesys Digital Callback
- Genesys Predictive Engagement
- Genesys Quality Management



Reduced Administration Costs

- Genesys Work and Lead Distribution
- Genesys KPI Insights
- Genesys Social Media Routing
- Genesys Business Communications



Reduced Customer Churn

- Genesys Outbound Dialer



Reduced Deployment Costs

- Genesys Voice Payment
- Genesys Business Communications



Reduced Employee Attrition

- Genesys Work and Lead Distribution



Reduced Handle Time

- Genesys Call Routing
- Genesys Personalized Routing
- Genesys Callback
- Genesys Customer Authentication
- Genesys IVR Personalization
- Genesys Email Routing
- Genesys Chat Routing
- Genesys Digital Callback
- Genesys SMS Routing
- Genesys Predictive Engagement



Reduced Interaction Abandonment

- Genesys Callback
- Genesys Customer Authentication
- Genesys Voice Payment
- Genesys IVR Personalization



Reduced Interaction Transfers

- Genesys KPI Insights



Reduced IT Operational Costs

- Genesys Voicebots
- Genesys Voice Recording
- Genesys Business Communications



Reduced Penalties and Fines

- Genesys Dynamic Case Management
- Genesys Voice Recording
- Genesys Voice and Screen Recording
- Genesys Voice Payment



Reduced Transfers

- Genesys Call Routing
- Genesys Personalized Routing
- Genesys SMS Routing



Reduced Volume of Interactions

- Genesys Outbound Dialer

Interdependencies

This page lists all PureConnect use cases and their mandatory / Optional interdependencies as well as any exceptions which they cannot be implemented with..

Use Case	All of the following required:	At least one of the following required:	Optional	Cannot be implemented with the following:
			<ul style="list-style-type: none"> • Genesys Work and Lead Distribution (BO02) • Genesys Call Routing (CE01) • Genesys Callback (CE03) • Genesys IVR Personalization (CE09) • Genesys Outbound Dialer (CE11) • Genesys Email Routing (CE16) • Genesys Chat Routing (CE18) • Genesys Digital Callback (CE22) • Genesys SMS Routing (CE29) 	
	<ul style="list-style-type: none"> • Genesys Call 			

Interdependencies

Use Case	All of the following required:	At least one of the following required:	Optional	Cannot be implemented with the following:
	Routing (CE01)			
		<ul style="list-style-type: none"> Genesys Call Routing (CE01) Genesys Personalized Routing (CE02) 		
	<ul style="list-style-type: none"> Genesys Personalized Routing (CE02) 			
	<ul style="list-style-type: none"> Genesys Customer Authentication (CE07) 		<ul style="list-style-type: none"> Genesys Call Routing (CE01) Genesys Personalized Routing (CE02) 	
	<ul style="list-style-type: none"> Genesys Personalized Routing (CE02) 		<ul style="list-style-type: none"> Genesys Customer Authentication (CE07) 	
		<ul style="list-style-type: none"> Genesys Call Routing (CE01) Genesys Personalized Routing (CE02) 		
		<ul style="list-style-type: none"> Genesys Chat Routing (CE18) Genesys Social Media Routing (CE19) Genesys SMS Routing (CE29) 	<ul style="list-style-type: none"> Genesys Predictive Engagement (CE37) 	

Interdependencies

Use Case	All of the following required:	At least one of the following required:	Optional	Cannot be implemented with the following:
	<ul style="list-style-type: none"> Genesys Chat Routing (CE18) Genesys Chatbots (CE31) 			
	<ul style="list-style-type: none"> Genesys Call Routing (CE01) 			
		<ul style="list-style-type: none"> Genesys Call Routing (CE01) Genesys Personalized Routing (CE02) 		
		<ul style="list-style-type: none"> Genesys Call Routing (CE01) Genesys Personalized Routing (CE02) 		
		<ul style="list-style-type: none"> Genesys Voice Recording (EE07) Genesys Voice and Screen Recording (EE08) 		

Maturity



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- 1 Inbound Use Cases
- 2 Digital
- 3 Outbound
- 4 Open Platform
- 5 Self-Service and Automation
- 6 Workforce Engagement

Maturity

Inbound Use Cases

Level 1	Level 2	Level 3
<ul style="list-style-type: none">• BO07 - Genesys KPI Insights• CE01 - Genesys Call Routing• CE03 - Genesys Callback	<ul style="list-style-type: none">• CE02 - Genesys Personalized Routing	No use cases with Level 3 maturity for this product category.

Digital

Level 1	Level 2	Level 3
<ul style="list-style-type: none">• BO02 - Genesys Work and Lead Distribution• CE16 - Genesys Email Routing• CE18 - Genesys Chat Routing• CE29 - Genesys SMS Routing	<ul style="list-style-type: none">• BO11 - Genesys Dynamic Case Management• CE19 - Genesys Social Media Routing• CE22 - Genesys Digital Callback	<ul style="list-style-type: none">• CE37 - Genesys Predictive Engagement

Outbound

Level 1	Level 2	Level 3
<ul style="list-style-type: none">• CE11 - Genesys Outbound Dialer	No use cases with Level 2 maturity for this product category.	No use cases with Level 3 maturity for this product category.

Open Platform

Level 1	Level 2	Level 3
No use cases with Level 1 maturity for this product category.	<ul style="list-style-type: none">• OP01 - Genesys Business Communications	No use cases with Level 3 maturity for this product category.

Self-Service and Automation

Level 1	Level 2	Level 3
<ul style="list-style-type: none"> • CE07 - Genesys Customer Authentication • CE08 - Genesys Voice Payment 	<ul style="list-style-type: none"> • CE09 - Genesys IVR Personalization 	<ul style="list-style-type: none"> • CE31 - Genesys Chatbots • CE41 - Genesys Voicebots

Workforce Engagement

Level 1	Level 2	Level 3
<ul style="list-style-type: none"> • EE01 - Genesys Workforce Scheduling for Voice • EE03 - Genesys Shrinkage Management • EE07 - Genesys Voice Recording • EE10-A - Genesys Employee Schedule Preferences • EE10-B - Genesys Employee Schedule Preferences • EE10-C - Genesys Employee Schedule Preferences • EE10-D - Genesys Employee Schedule Preferences • EE22 - Genesys Speech Analytics • EE25 - Genesys Text and Speech Analytics for Compliance 	<ul style="list-style-type: none"> • EE02 - Genesys Omnichannel Workforce Scheduling • EE08 - Genesys Voice and Screen Recording • EE09 - Genesys Quality Management • EE23 - Genesys Advanced Text and Speech Analytics • EE24 - Genesys Text and Speech Analytics for Customer Service 	<ul style="list-style-type: none"> • EE11 - Genesys Shift Bidding

Genesys Work and Lead Distribution (BO02) for PureConnect

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.

Other offerings:

Genesys Engage on-premises

Contents

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- 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
 - 6.2 Document Version

Use Case Overview

Story and Business Context

The work distribution system is designed to capture, prioritize, and effectively distribute tasks across multiple departments to the best-suited employee, based on employees, skills, and availability. This is achieved when the system is integrated with one or multiple task source systems (like CRM, BPM, and Workflow systems) where tasks related to customers are created and stored.

To determine the individual tasks' priority, the work distribution system is configured to ensure the timely completion of all tasks for all customers.

The work distribution system understands the real-time status, readiness, and skills of the employees that handle tasks, and uses rules to identify how the distribution should be handled in the most effective way.

Once the organization has a list of tasks that need to be handled by employees (coming from different source systems), the tasks are captured by the work distribution system and automatically distributed to employees based on their skills, capacity, and real-time presence. Prioritization rules for the tasks ensure that all tasks are distributed on time to the best fit resource. The system provides functionality for near-real-time monitoring and historical reports on operational performance and on major business KPIs.

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 tasks 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 the tasks to the right agents. Increase throughput, utilization, and efficiency in agents' work, by delivering the tasks to the agents' universal desktops in push mode via screen pop together with interaction context and history in blending mode
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	Reduce manual distribution and task monitoring by supervisors via automation, including scheduling

Use Case Benefits	Explanation
	and reporting through intelligent task distribution. Add visibility into employee and group performance.
Reduced Employee Attrition	Offer fair distribution of workload across the available resources.

Summary

A customer journey initiates different process steps that may require manual intervention. The corresponding work items / tasks are created in CRM/BPM/Workflow systems, which play the role of source systems for tasks, but often distribute these tasks to separate queues.

The Genesys work distribution system captures tasks created in the source systems, then places them into the queue and prioritizes the tasks based on configuration. The Genesys work distribution system can distribute all interactions (voice / non-voice) to the best-skilled agent just in time, as they become due based upon their priorities. Through blending with other media types, this use case enables Front Office-Back Office integration.

Use Case Definition

Business Flow

(1) Part 1 - Capture and Distribution

The following flows describe the capture of tasks and their distribution to employees, followed by the task handling process the employee follows.

Business Flow

(2) Part 2 - Task Handling

Business and Distribution Logic

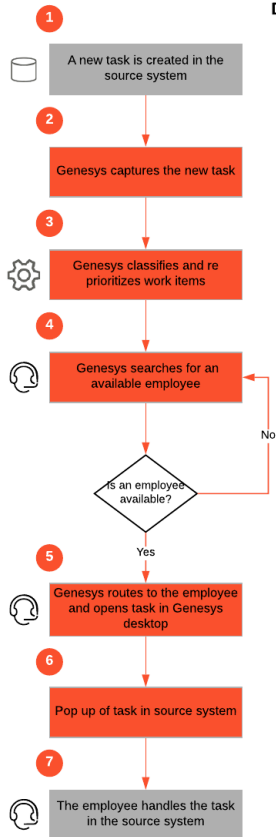
Business Logic

Task Classification and Prioritization

- Once a task has been created within the Genesys system, the system assigns the priority settings for handling the task (Task Prioritization). For example, the business process defines the queues needed to handle the task. Prioritization is based on the attributes associated with tasks and on the configuration described below.

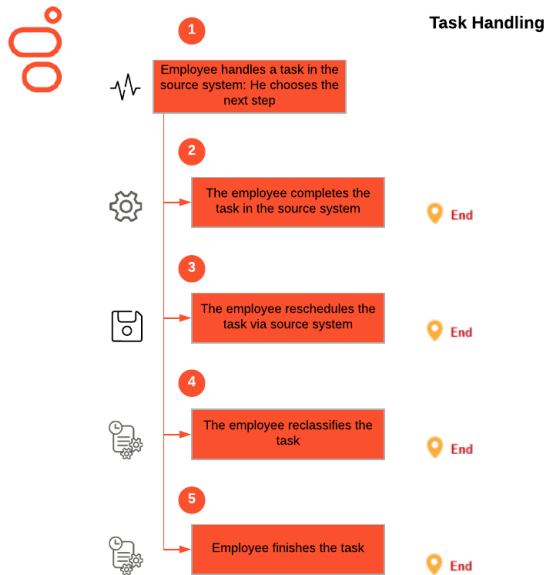


Capture and Distribution



Business Flow Description Part 1 - Capture and Distribution

1. The source system (the BPM / CRM / business system storing and processing the work items associated with business processes) requires an employee to handle one of its work items. The source system uses the Genesys Generic Objects API to create a corresponding task in Genesys.
2. Genesys captures the new task and creates a new interaction in the system.
3. The interaction is prioritized according to the configuration.
4. The task is queued with all other interactions in the system. The priority of the task defines the position of the task in the queue. Once an employee with the right skill becomes available to handle the task, the task is distributed to the employee.
5. The task opens on the employee desktop.
6. The Genesys employee desktop opens the corresponding work item URL in the source system.
7. The employee handles the task in the source system.



Business Flow Description Part 2 - Task Handling

- The employee finishes working on the task in the source system, then decides on the next step.
- The employee may be able to complete the task so that no further action is required.
 - The employee completes the task in the source system.
 - Then the work is finished within the Genesys employee desktop (“Disconnect”).
 - The employee then selects the appropriate wrap-up code.
- The employee may need to reschedule the task because, for example, the customer is available only on the next day. In this case, the employee reschedules the task via the source system (see Reschedule Task).
- The employee may not be able to handle the task because it is wrongly classified. In this case, the employee reclassifies the task via the source system (see Reclassify Task).
- The employee may coincidentally finish the task in the Genesys employee Desktop without any update in the source system (“Disconnect”). In this case, no further action is taken by Genesys.

Attributes

Task prioritization in Generic Objects is based on configuration. In order to apply the configuration within Generic Objects, a set of business attributes (parameters) needs to be passed from the source system to Generic Objects during the capture event.

The Generic Objects data model is flexible and allows the source system to submit any metadata that is relevant to the task.

Configuration

The source system configuration defines the operating principles and constraints of your organization. Example: “All tasks associated with

Department Finance and Customer Segment Gold are classified by the source system to be assigned a priority of high” or “If task attribute Department equals Credit and the Customer Segment equals Silver then the priority assigned by the source system is medium”. In Generic Objects, configuration uses attributes from the captured task to submit the interaction in a particular queue and to assign it to the proper group of employees. The position of the interaction in the queue is based on the total ACD queue calculation.

Priority Rules Priority rules are applied to the task initially after being captured by setting:

- an initial value for the priority
- the initial priority remains for the duration of the interaction
 - Priority rules can be changed through a professional services engagement to meet your needs
 - In a blended environment, the priority ranges used for tasks are synchronized with the priority ranges for other media.

Task Life Cycle/Task Completion

Tasks within Genesys are completed via the source system. The logical flow is as follows:

1. The employee completes a task in the source system. After this, the employee clicks “Disconnect” in Genesys to signal that the task is complete.
2. The employee is then ready for the distribution of a new task and setting the disposition code in Genesys.

Throughout the lifecycle of the task, supervisors and managers have access to the task. This enables management to view the status and contents and to manually retrieve work items.

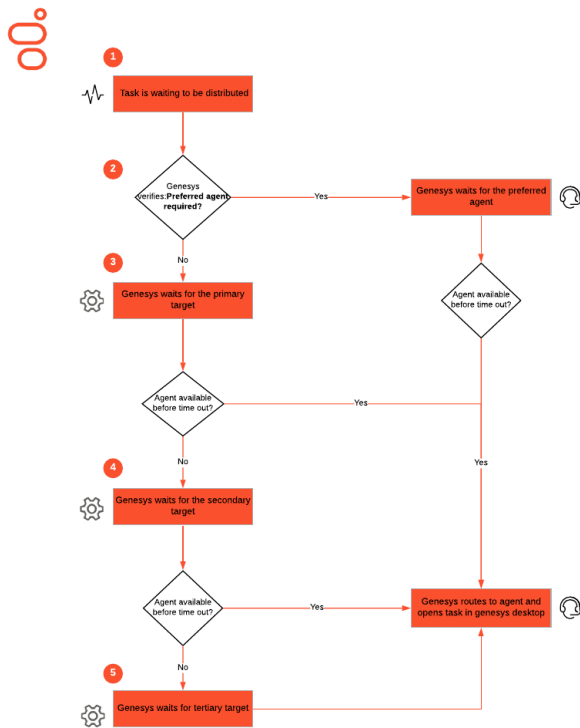
Reclassify Tasks

An employee might also need to reclassify a task. Reclassification is handled through the source system and depends on source system functionality and integration with Generic Objects. The logical flow is:

1. The employee determines that a task needs to be reclassified.
2. Either
 1. The agent reclassified the task within the source system and disconnects within Genesys.
 1. The source system completes the first task and resubmits the reclassified task.
 2. In this instance, the source system is typically used for historical reporting.
 2. The agent transfers the task to the appropriate queue in Genesys.
 1. in this instance, the Genesys reporting is typically used.

Distribution Flow

The following diagram shows the distribution flow:



Distribution Flow Description

1. A task needs to be distributed.
2. The task targets the primary agent based on the skills assigned on the task. This is typically the best-skilled employees for this task.
3. If the task cannot be distributed to the primary target within the defined period, Genesys expands distribution to the secondary target.
4. If the task cannot be distributed to the secondary target within the defined period, Genesys expands distribution to the tertiary target.
5. Genesys waits for an employee satisfying the skill and skill level requirements for the tertiary target until the task can be distributed.

Distribution Logic

Skill-based routing

This use case provides a predefined routing strategy that creates all the queues needed to assign a task to a specific employee. The routing strategy is based on distribution via skill, ensuring that a task is distributed to the best suitable employee independent of place in the organization. The required skill is defined by the Generic Objects configuration. Each employee has one or more queues associated with their profile and a skill level associated with each queue, known as proficiencies. The skill level is used to define 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 based on Queue. The distribution logic supports Redirect on No Answer (RONA): if an employee does not accept a distributed task, the task is routed to another employee after a timeout. The

first employee is set to not ready. This use case is combined with use cases for different media types.

In this case, blending with other media types is supported including the required configuration of capacity rules.

User Interface & Reporting

Agent UI

Task Handling-related Requirements The agent desktop provides the following functionality:

- Task processing from generic objects
- Auto vs manual answer
- Popup of the task in the source system via URL, or display of the source system ID that is used to manually open a task in the source system

General Requirements

The agent desktop has multiple not-ready statuses configured (Admin Work, Lunch, Meeting, Pause, RONA, and Training). The configuration of disposition codes to report on the business outcome (Cross Sell, Need Follow-Up, Not Right Skill, Processed, Terminated, Transferred, Up-Sell).

The customer can choose for this use case from either:

- Interaction Desktop or
- Interaction Connect

Premises and Cloud

IC Business Manager is a Genesys application that offers personalized dashboards based on specific functional, geographical or organizational needs. IC Business Manager 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, generic objects handled, and the average handle time.

With IC Business Manager you can:

Monitor the current state and activity of contact center objects to help make decisions about staffing, scheduling, and generic object routing strategies.

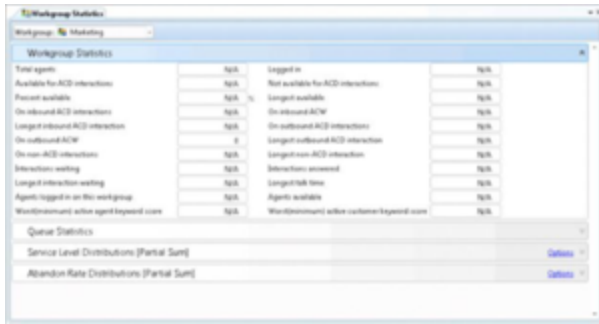
Monitor operational activity through the Generic Objects Activity views. Monitor agent resource activity through the Generic Objects Activity views. Monitor tenant service level through the Service Level views.

Statistics Displayed on the Desktop

The required statistics to be presented on the agent desktop consist of an agent, status, and interactions statistics.

The status statistics are easily configurable by the end user.

Below is an example of Generic Object statistics that are available in Interaction Connect Business Manager for the workgroup.



Reporting

Real-time Reporting

Workgroup Queue

You can view live statistical data for a selected workgroup queue in an efficient and highly visual format. Service Level, Abandon Rate and Wait Time statistics display prominently. You can compare statistics for selected workgroup queues by displaying this view multiple times and selecting a different workgroup each time. With the appropriate license, you can select which statistics you want to view and also enable alerts for the statistics.

Agent Statistics

The Agent Statistics view summarizes the activity of a single agent in a selected workgroup. This view enables supervisors to manage agents. It shows user status, workgroup activation status, and the selected agent's specific statistics. It includes a queue view of the interactions assigned to the agent.

Historical Reporting

Queue Service Level

The Queue Service Level report provides the ability to see the summary and details of up to 12 configured service levels in an absolute or cumulative view with a percentage option.

Queue Summary and Detail

The Queue Summary and Detail report presents summarized statistical data along with detailed statistics on workgroup queues. The statistics are reported, grouped, and summarized by any combination of the queue, media type, interval, skill, or DNIS. Data for calls answered or abandons is summarized and displayed when a single service level configuration is present in the data selected but is otherwise suppressed. The report also displays a chart for interactions distributions and service level.

Wrap Up Codes

The Wrap Up Codes Report displays statistics for completed interactions, summarized by the group, including; Wrap-up code, Queue, User, or Date. The flexibility in creating this report allows the User to display the groups in any order or not include a group in the report. The report also allows the User to choose to display interaction details.

Queue Period Statistics Agent Wrap Up Code by Queue Detail Report

This report enables a supervisor to see the wrap-up codes and related detailed statistics (number of interactions, average talk time, total talk time, average ACW, total ACW, and the number of supervisor requests) for each agent in each queue. A wrap-up code of "NS" means the user did not specify a wrap-up code in the specified time period, even though wrap-up codes were enabled and offered.

Queue Period Statistics Wrap-up Code Summary Report

This report enables a supervisor to see the wrap-up codes and related summary statistics (number of interactions, average talk time, total talk time, average ACW, total ACW, and the number of supervisor requests) for each agent or each queue. A wrap-up code of "NS" means the user did not specify a wrap-up code in the specified time period, even though wrap-up codes were enabled and offered. A wrap-up code of "-" (dash) indicates a regular interaction where no wrap-up code was offered, specified, or entered.

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

There are known limitations on workforce planning for Generic Objects. For more information please contact your account team.

Customer Responsibilities

- Integration of the source system with Genesys is handled by the customer.
- Any changes within the source system that are needed for the integration with Genesys are the customer's responsibility.
- The task is managed/completed in the source application, so the agent needs to have access to the source application (BPM/CRM). To enable popup of the task in the source activation, a URL must be provided to Genesys together with the task. Otherwise the agent must pull the task manually.

Document Version

- Version **V 1.1.1** last updated **March 27, 2025**

Genesys KPI Insights (BO07) for PureConnect

Monitor and analyze interaction data to detect addressable service level anomalies

What's the challenge?

You need quick and easy access to data insights that will help you improve results. When data is missing or is inconsistent across channels, and when business users find it difficult to get to information they need to make good decisions, customer and agent experiences suffer.

What's the solution?

Improve the customer and employee experience by giving business users a full view into real-time agent and workgroup activity and tools to take timely action. Genesys KPI Insights monitors performance against operational goals and provides simple filtering, drill-down and reporting to address service issues in a snap.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

Business users must be able to report, monitor and make decisions regarding their contact center/customer experience to ensure ongoing improvement and the best business outcomes. Knowing when changes need to be made, the impact of the change, and when not to make changes requires the ability to rapidly identify anomalies and understand the root cause behind the anomalies. Maintaining alignment between routing, reporting, and resources is essential in streamlining the business and driving optimization. Companies set their business plans regularly along with the key performance indicator (KPI) objectives that they use to measure customer experience success. To manage the company's contact center objectives and meet end customers' business needs, there is a set of required operational KPIs.

A good business practice is to analyze contact center performance through the review of service level targets and agent performance. The goal is to assess areas of focus to improve the customer service quality and identify any remediation actions.

For example, a contributing factor for service level targets is the percentage of interactions answered within a time frame (target). A contributing factor for agent performance is the average agent negative/positive score. For example, an organization might set an objective to have the service level KPI and the average agent negative/positive score be within the reasonable limit that is set by supervisors according to business needs.

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 First Contact Resolution	Provide visibility into call repetition pattern in reports
Increased Revenue	Isolate and track anomalies to facilitate root-cause analysis to remedy issues
Reduced Administration Costs	Increase visibility into training needs and skills-based routing through better reporting data. Provide readily available reports through KPI-based reporting
Reduced Interaction Transfers	Reduce transfers because of additional visibility attained through KPIs that help identify areas of training and skills-based routing optimization

Summary

Improve efficiency through real-time reporting to improve agent utilization, reduce churn, and

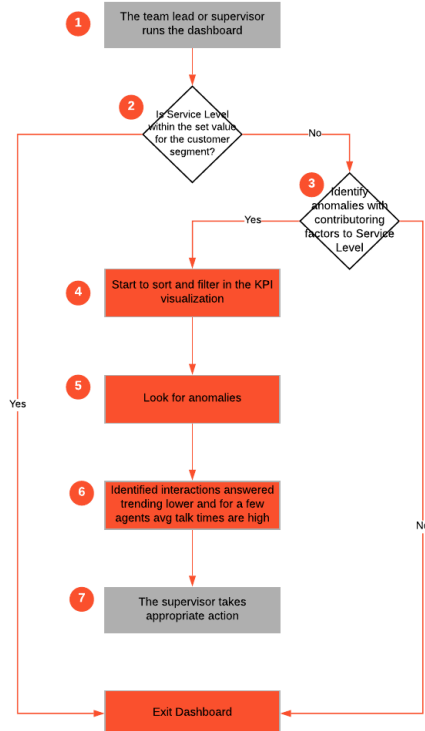
enhance customer satisfaction scores. Companies need the ability to monitor and analyze detailed interaction data to discover anomalies in service levels and agent performance. Mapping this data against business outcomes across all channels, and where appropriate, companies can make informed strategic and operational decisions that minimize future anomalies.

Use Case Definition

Business Flow

(1) Service Level Analysis

The flow below describes how a team lead or supervisor would perform a service level analysis. The reports needed for this analysis are defined in the Business Flow Description.



Business Flow Description

1. The actor (team lead, supervisor, or business analyst) runs a dashboard. Reference - BL1
2. The supervisor reviews the dashboard and checks it against business level KPIs for service level, interactions answered, and customer segmentation. Reference - BL2
3. If the supervisor finds anomalies in the service level target, they analyze further reporting data to identify anomalies with factors that contribute to service level. Reference - BL3
4. For further analysis, the supervisor looks at the service level target against the other variables and notices that the number of interactions answered is trending lower. Reference - BL4
5. The supervisor analyzes the information for anomaly details and correlations and finds out that there were a few agents with higher than normal average talk times. (For example, workgroup, agent statistics KPI). Reference - BL5
6. This information helps the supervisor identify the root cause for the service level anomaly. As an example, the supervisor looks into an agents' interactions and discovers a very long interaction with

multiple holds. After talking to the agent or listening to the call, the supervisor determines that the call was complex for agents to handle and it required multiple holds to get assistance. Subsequently, the supervisor identifies that the root cause is the training of agents who service a particular customer segment. Reference - BL6

7. The team lead or supervisor takes appropriate action.

Business Flow

(2) Agent Performance Analysis

The flow below describes on how a team lead / supervisor would perform an analysis of agent performance. The reports needed for this analysis are defined in the Business Flow Description.

Business and Distribution Logic

Business Logic

Parameters and Business Rules

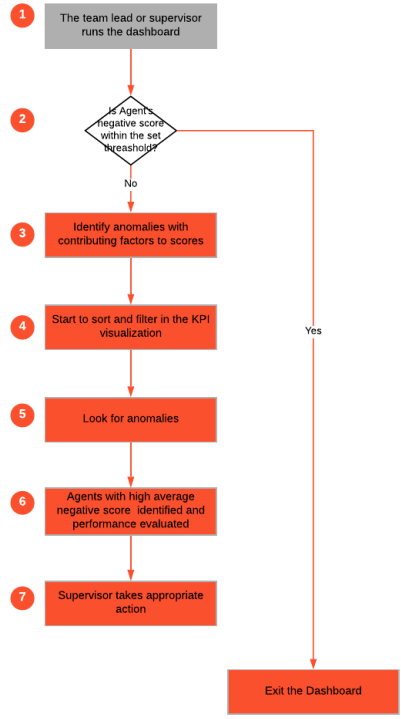
Service Level Analysis

BL1: Assign reports to roles within the company

- The business decides during implementation and operation which roles have access to view dashboards. The roles are based on users' access rights and are configurable in Interaction Administrator.
- The roles are then assigned to report users to have a login to the online reporting.
- This is part of CX Insights standard capabilities.

BL2: Comparison of reports with business level KPIs:

- The actor analyzes the Multiple Workgroup Interval Analysis dashboards and notices that the service level target is low for the current shift or period.
- The actor reviews the report against business level KPIs for service level and customer segmentation.
- The actor reviews the service level in the report and notices that the number of interactions answered is



low
and **Business Flow Description**

1. The actor (team lead, supervisor or business analyst) runs a dashboard. Reference - BL1
2. The supervisor reviews the dashboard against business level KPIs for agent performance and customer segmentation. Reference - BL2
3. If the supervisor finds anomalies in the average agent score, they analyze further reporting data to identify anomalies with factors that contribute to agent score. For example, the supervisor might be able to determine which workgroup and/or agent show high average agent negative/positive scores. Reference - BL3
4. The supervisor looks further into the details (for example, by filtering and sorting against workgroup and agent). Reference - BL4
5. The supervisor analyzes the information for anomaly details and correlations (for example, workgroup, agent statistics KPI). Reference - BL5
6. This information helps the supervisor identify the root cause for the average agent score anomaly. As an example, they may identify that high average agent negative/positive score is driven by certain agent statistics, Workgroup, etc. Subsequently, the supervisor identifies that the root cause is a particular agent servicing a particular customer segment. Reference - BL6
7. The team lead or supervisor takes appropriate action.

decides to investigate.

BL3: Analysis of contributing factors

- The parameters that drive service level target are interactions answered and average talk times of an agent.
- When an anomaly is seen in service level target on the reports, the actor investigates the cause of the anomaly and makes a decision by evaluating the multiple workgroup intervals.
- The actor has the service level set for their team and measures against these values. The service level

target parameters are part of the reporting. Threshold values can either be set by the actor or be automatically calculated in Interaction Administrator.

BL4: Filter into details

- The reporting user starts to filter the reports to identify the underlying root cause of the high average talk times and lower interactions answered.
- The reporting user makes a decision as to where the underlying driver of the service level target is coming from and compares different KPIs with other agents.
- The service level parameters are part of CX Insights. For example, calls answered, calls on-hold, and average talk time.

BL5: Identify correlations

- The filtering continues to identify the underlying root cause of the high average talk times and lower interactions answered.
- When an anomaly is seen in the reports, the actor investigates the cause of the service level anomaly and identifies that average talk time and average hold time have risen at the same time that the service level was not met by evaluating the Multiple Workgroup Interval and Agent Dashboards.
- The actor sees that the average talk time for the period exceeded the service level.

BL6: Identify root cause

- The parameters are part of CX Insights reporting.
- The actor investigates the agents and decides whether the newly hired agent(s) require training to reduce the average talk times and hold times or if other corrective action should be taken, such as making changes to the routing, scheduling, skill levels, etc.

Agent Performance Analysis

BL1: Assign reports to roles within the company

- The business decides during implementation and operation which roles have access to view dashboards. The roles are based on the access rights the user has and are configurable in Interaction Administrator.
- The roles are then assigned to report users to have a login to the online reporting.
- This is part of CX Insights standard capabilities.

BL2: Comparison of reports with business level KPIs:

- The actor analyzes the agent overview and multiple workgroup overview dashboards and notices that the agent negative/positive score is high for the current shift/period.
- The actor reviews the report against business level KPIs for agent performance and customer segmentation.
- The actor reviews the average agent score in the report and notices that the agent negative score exceeds the set threshold value and decides to investigate.

BL3: Analysis of contributing factors

- When an anomaly is seen in average agent scores in the dashboards, the actor investigates the cause of the anomaly and makes a decision by evaluating the agent and the subsequent workgroup.
- The actor's team has set threshold values and measures scores against these values. The average agent score parameters are part of the reporting and the threshold values can either be set by the actor or be calculated automatically based on the percentage range.

BL4: Filter into details

- The reporting user starts to filter the dashboards to identify the agents having high average agent negative scores.
- The reporting user makes a decision as to the source of the high average negative score and compares different KPIs with other agents. For example, calls answered and calls on-hold.
- The average agent negative score parameters are part of CX Insights.

BL5: Identify correlations

- The filtering continues to identify the underlying root cause of the agent negative score.
- When an anomaly is seen in the reports, the actor investigates the cause of the high agent negative score.
- The actor views the average negative score time for the period that exceeds the threshold value.

BL6: Identify root cause

- The parameters are part of CX Insights reporting in the agent and workgroup dashboards.
- The actor investigates the agent performance and decides whether the newly hired agents require training to improve the call quality or if other corrective action should be taken, such as making changes to the routing, scheduling, etc.

Distribution Logic

N/A

User Interface & Reporting

Agent UI

N/A

Reporting

Real-time Reporting

The agent and workgroup dashboards provide users with an easy way to see a wide range of real-time agent and workgroup activities to understand the current state of the contact center. The

visualizations include the number of agents on- and off-queue, time in statuses, and insight into the interactions answered and on-hold, complete with filtering and sorting capabilities.

Master Filters on Dashboards:

- Workgroup selection
- Interval selection
- Agent Selection

Agent Dashboards -It is possible to report the following KPIs:

- Avg Wait Time
- Avg Talk Time
- Avg Hold Time
- Longest Talk Time
- Longest Wait Time
- Agent Availability
- Average Agent Negative/Positive Score
- Average CustomerNegative/Positive Score

• **Workgroup Dashboards** -It is possible to report the following KPIs:

- Avg Wait Time
- Avg Talk Time
- Avg Hold Time
- Total Talk Time
- Total Wait Time
- Total Hold Time
- Service Level Missed Target
- Service Level Target
- Abandon Rate Missed Target
- Abandon Rate Target
- Longest Talk Time
- Longest Wait Time
- Longest On-Hold Time
- Agent Availability

Release Notes:https://help.genesys.com/cic/mergedprojects/wh_rn/desktop/cx_insights.htm

Historical Reporting

Use Interaction Reporter for some performance analysis reports.

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

- Customer should have new analytics feature license enabled to view the dashboards.
- Drill down capabilities are available for some reports in Interaction Reporter.
- This use case is for Inbound interactions only.
- The following user roles will be supported within the scope of this use case: Team Lead, Supervisor, Business Analyst.
- Other requirements
 - KPI captured and analyzed is part of CX Insights
 - This essential use case is based on the Servical Level metric and Agent Performance
 - Once anomalies are identified in reports, the team lead/ supervisor can take actions:
 - Agent performance in terms of call quality, average wait times
 - Train additional agents with the impacted skill to take care of the call quality influencing interactions.

Document Version

- Version **ver 1.0.1** last updated **March 27, 2025**

Genesys Dynamic Case Management (BO11) for PureConnect

Combine Genesys Omnichannel customer experience with Dynamic Case Management to support human-centric automation, continuous innovation and transformation.

What's the challenge?

Contact center, back office and enterprise employees struggle to handle non-linear and human centric processes efficiently. Customer promises are broken as work falls through the cracks. Employee morale suffers with unfair workloads. Customer experience is suffering because back-office and front-office operations are not well integrated.

What's the solution?

Genesys Dynamic Case Management (DCM) provides a no-code/low-code integration with DCM solutions to automate the distribution of structured and dynamic work. Drive process improvement, improved visibility, and faster case resolution with back-office automation and a single user interface for case management.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

Dynamic Case Management (DCM) enables Genesys customers to leverage the back-office automation capabilities to help employees and supervisors better manage cases. Companies can improve processes for the resolution of cases by:

- Providing a single interface for case resolution
- Breaking the inflexibility of current processes
- Getting a 360° view on the process handling and associated SLAs
- Increasing advisors' satisfaction and autonomy
- Increasing supervisor visibility and control
- Giving agents visibility into other tasks or people associated with their immediate work

In addition to this, the benefits can be combined with the Workload Management use cases. For more information, see Genesys Work and Lead Distribution (BO02) for PureConnect. Various Genesys partners can deliver the DCM component of this use case. While Genesys can integrate with many DCM partners, this use case focuses on Eccentex Appbase DCM offerings. To illustrate this use case and make it more tangible, we have provided technical information from the Eccentex platform. In a future release, we will introduce technical details from other vendors. If you are interested in another case management solution provider, the Genesys account team can help you contact our Genesys solution leads. The Genesys DCM solution can be deployed on cloud, on-premises, or in a hybrid model. Genesys DCM brings the omni-process concept, allowing integration of data and tools into a single user interface. This enables agents and advisors to work on a single application instead of having to switch between applications to resolve cases. In the background, the solution orchestrates the flow of information, ensuring that the required information is provided to the agents and advisors at the right time. The solution replicates new input in the relevant back-end systems.

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	Consistent customer experience for non linear case management scenarios and channel agnostic.
Improved Employee Utilization	Unified desktop and user experience optimized for dynamic case resolution.
Improved Insights and Visibility	Improved customer visibility of the case and improved employee insights in case handling and management.
Increased Response Rates	Enforced service level management based on contextual information and business rules to drive

Use Case Benefits	Explanation
	response rates.
Reduced Penalties and Fines	Drive work to be resolved prior to breaching the service level, legal, operational or contractual obligations and optimize the use of your resources.

Summary

Genesys sees the digital journey of the customer as something more than a technological process to be managed by a customer relationship management (CRM) or business process management (BPM) tool; rather, it is a whole-person digital journey that serves the customers on their terms in ways most effective for their needs at any one time or at any one place.

Genesys DCM provides customers with building blocks for the future to deliver automation, efficiency, sales, marketing, enhanced customer service, and a better experience for customers, employees, and external partners. Although Genesys is an open platform that supports integration with hundreds of other products and solutions in the market, the proposed approach is the recommended solution to provide a human-centric DCM omnichannel experience.

Use Case Definition

Business Flow

Case Capture

This use case supports two types of case capture.

- **Web form capture:** Use of a web form that could be integrated into your web site, portal and or intranet environment. Genesys provides a web form, that allows customers and internal employees to create new cases and provide the required information for case creation as part of the scope.

Note: The integration in the selected web site, portal and or intranet portal and the adaptation to the company layout and security requirements of this web page are both out of the scope for this use case.

- **Employee capture:** The customer will get in touch with contacts the front-line employee through a communication channel (for example: voice, email, chat, social, SMS, Apple Business Chat, etc.) Note that the provisioning of the communication channel(s) is out of scope and could be delivered by Genesys through several other use cases.

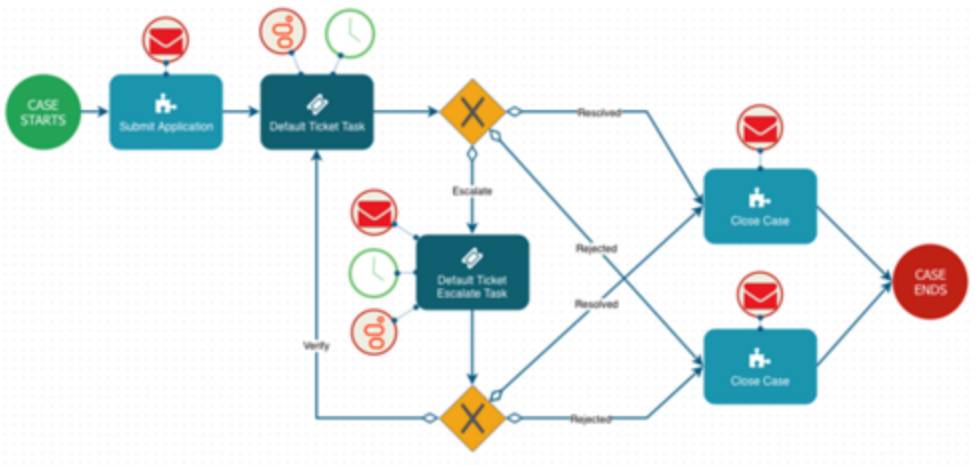
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Business Flow Description

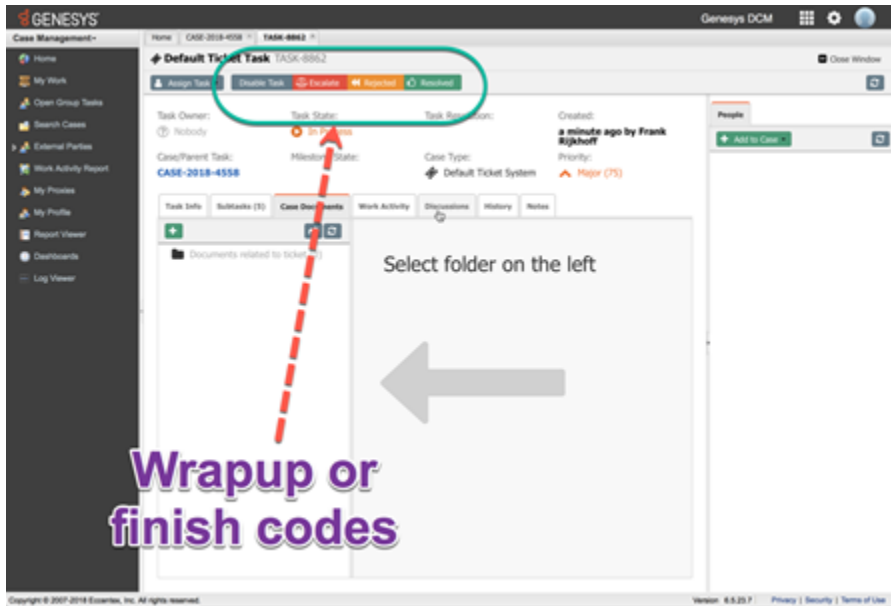
1. A customer/employee is browsing the company website portal or intranet
2. On the site, a form is presented. Upon completion, a new instance of that specific case type is started
3. An automated email is sent to the customer, based on the provided email address in the form, to confirm that the case is now created
4. After the case starts, a new task is created and sent to a workgroup or Advisor, based on ACD properties such as Skill, Priority, etc.
5. Advisor picks up the work in the client application task form, for the Advisor to provide all information needed to complete that task
6. If Advisor cannot resolve the task, it can be escalated, meaning send the task/case to another (2nd Level / Expert) group to work on
7. If Advisor can complete the task, the case will be closed and an automated email with results sent to the customer
8. If Expert can complete the task, the case will be closed and an automated email with results sent to the customer, or the Expert can choose the option to send it back to the original Advisor for closure (verification)

Business Flow

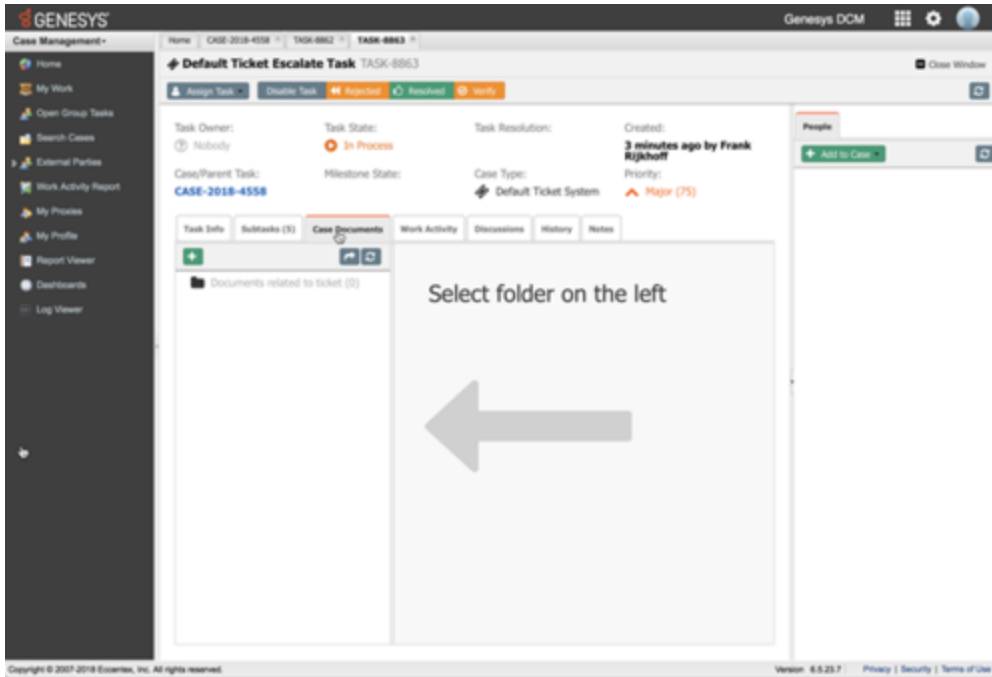
In Eccentex DCM, the case workflow (procedure) looks like:



On each task (dark blue) an SLA can be set to meet your business' SLA's (depicted by the green clock icons). Based on the Employees wrap-up (completion) code on the first task (resolved, rejected to escalate) the next step is taken. This could be automated closure with sending the customer a confirmation email/SMS/Notification with the outcome, or a new task sent to an escalation group. The initial task looks like:



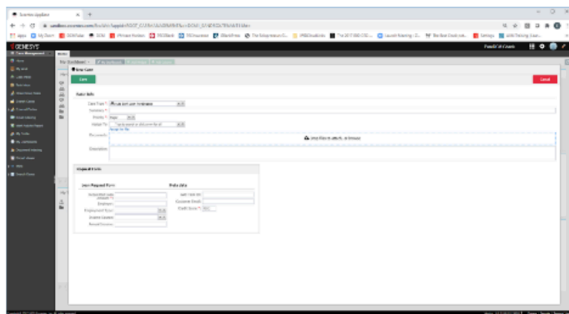
The "Escalation" tasks looks like:



These tasks can be embedded in the Advisor or Expert contact center application (such as Interaction Connect).

Business Flow Description

Business Flow



Business Flow Description

Business and Distribution Logic

Business Logic

Case creation

For this use case, we have foreseen three ways of initiating a new case. A new case can be created:

1. Via a web form on a public or internal website. Completion of this form triggers a web service call, which creates a new case in DCM via its open API.
2. Via DCM user interface. An advisor or expert can create a new case manually. This method can be used if email or voice channels are used. The advisor (agent) who handles the call or email manually creates a new case. see:

3. Via the Eccentex Smart API. This allows the creation of cases by other backend systems.

Distribution Logic

Simple Distribution This use case includes simple distribution logic, where tasks are sent to workbins and it is up to the employees and experts to ensure they are processing the tasks according to the expectations of the company. Advisors need to pull tasks from their associated workbins.

The escalation monitoring part of the process ensures tasks are processed in due time, by sending at-risk tasks to experts.

This use case also enables supervisors to assign tasks from team workbins to one of their employee's workbins.

Advanced distribution

The advanced distribution can be implemented if one of the optional Workload Management distribution use cases has been selected and is deployed at the same time.

In this section, highlights some of the benefits of combining this use case with a workload distribution use case:

- No cherry picking
- Ensure employees and experts are working on the most important tasks for the company first
- Measure employees and experts handling time
- Enabling workforce management/optimization for employees and experts

- The push of tasks reduces allocation bias and idle time
- Employee performance visibility for the individual as well as for the supervisors
- Fair distribution of tasks

For more information on these high-level benefits, refer to the Workload Management distribution use cases (Genesys Work and Lead Distribution (BO02) for PureConnect

An additional benefit of combining use cases includes:

- Fewer groups need to be configured in DCMA's distribution because additional parameters (for example, Language and Case_Type), enable each group to support multiple possibilities.

For example: Enterprises no longer need to foresee different target groups for all the languages and/or segments you support for a specific case type. The routing engine takes into consideration the skills (languages, segments, etc.) and proficiency levels of the advisors in the task distribution.

Advisor Case handling

Simple Case Handling environment

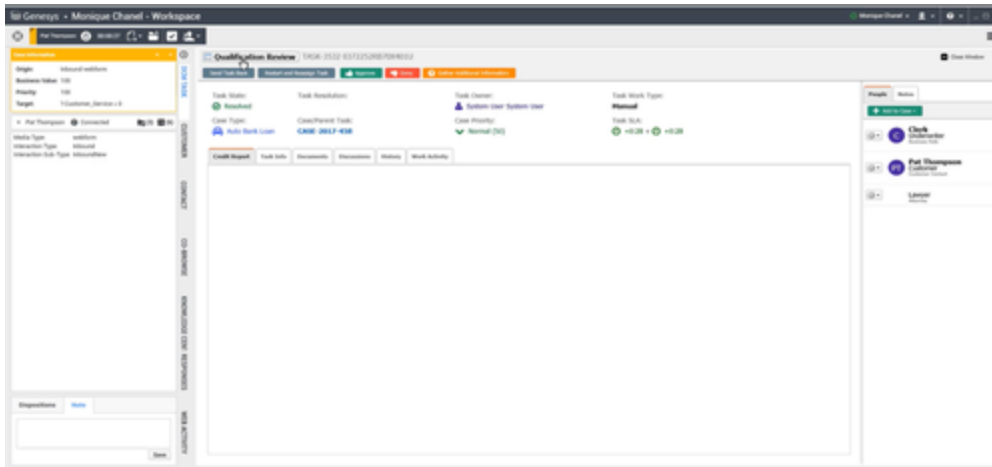
The Eccentex platform comes with its own advisor environment, where employees can review and manage the tasks to which they are assigned. With access rules, it is possible to provide the right visibility and capabilities to each of the people involved in the handling of the case.

Advanced Case Handling environment

If a Workload Management use case will be deployed with this use case, beyond the additional routing and distribution capabilities, new capabilities will also be provided to the employees.

With the Workload Management use case, an Advisor (Agent) toolbar is provided. With the toolbar, employees can log in and put themselves in the desired mode (for example, selecting their login status and ready state, communicating with colleagues, etc.). They can also easily interact with customers if some communication channels are available. Once they receive new tasks, they can get preview information and contextual information to provide an enhanced customer experience.

Note that all standard case handling capabilities are unchanged as the Eccentex DCM interface appears in a frame of the Advisor/Agent toolbar as shown below.



Escalation Process

Escalation criteria

The following escalation criteria are foreseen in this use case:

- Operation level agreement (OLA) for the task.
 - If a task is not performed in OLA time, the task is automatically escalated. OLA monitoring can escalate the task at any step of the normal handling flow. The only exception to this is if an advisor is currently effectively working on the task (task's screen open and active on the desktop). In this case, the task will be subject to escalation if the advisor does not finish the case before closing the task window. As there is only one escalation mechanism, escalated tasks cannot be further escalated. **Note:** Adding Genesys Work and Lead Distribution (BO02) for PureConnect to this use case provides significantly more escalation options. OLA should be smaller than Case SLA, to allow sufficient time for experts to resolve the case. SLA and OLA can be defined in Open Office time or Calendar time. (Allowed format: Days; hours; Minutes)
- Advisor manual escalation.
 - An advisor handling a task can decide to escalate the task if they think this is appropriate to secure in time 'Case Resolution.'

Detail escalation process

Once a task has been escalated, it will always follow the same escalation path. The target escalation expert group can be determined based on the case type.

Note: Adding Genesys Work and Lead Distribution (BO02) for PureConnect to this use case allows for escalation based on any metadata or context around the case.

Case_Type	SLA	SLA/OLA Type	Handling_TargetOLA	Escalation_Target
Technical	16 hours	Open office time	Employees_group_1 12 hours	Expert_group_X
Finance	3 days	Open office time	Finances_group_B 2 days	Team_Supervisor

Replacement	Calendar time	Field_service_group_C	8 days	Express_delivery_team
-------------	---------------	-----------------------	--------	-----------------------

Once one of the escalation criteria is met, the associated task is escalated and the task is sent to the escalation target. The experts associated with this target then receive the escalation in their inbox and are responsible for handling it as quickly as possible. Supervisors can monitor the tasks (normal and escalated) through the reporting interface. Based on the input, they can assign or remove additional employees or experts. They can also change the task's targets and OLA/SLA.

Live notifications

At several steps in the process, notifications can be activated. The activation of the different notifications can be done based on the case type. Administrators and/or supervisors can alter the content of the notification messages. Assuming several notification channels are available, the selection of the notification channel can be done based on case type (communication channels will not be delivered in the scope of this use case).

Case_Type	Creation Notif	Create Notif Change	Assign Notif	Assign Not. Change	Other Notify
Technical	Yes	Email	No		...
Finance	Yes	SMS	Yes	Email	..
Replacement	Yes	Email	Yes	Mobile Notification	..

The content of the different live notification messages is configurable by the administrator and/or supervisors. The message is the same for all case types, but the message supports the following variable information:

- Case_Type (for example: Technical, Finance, Replacement)
- Case_Description (for example: technical issue)
- Case_Id (for example: 1234566 2346)
- Case_SLA (for example: 12)
- Case_SLA_format (for example: Days, Hours, Minutes)
- Case_SLA_Type (for example: Open office time/ calendar time)
- Case_Target (for example: Finances_group_B)
- Case_Creation_Date
- Case_Creation_Time
- Case_Status

Other variables coming from the case creation forms (Maximum of 20 fields. This is not a technical limitation, for more than 20 fields, additional PS effort is required.)

Examples of variables that can be captured in the creation form:

- Customer_Name
- Customer_Firstname
- Customer_Id
- Customer_Email
- Customer_Segment
- Customer_request_description
-

Example of Message::

Dear ,

With this email, we want to confirm that an ACME ticket has been created for your request at . The related identifier for your ticket is the following.

You will receive an answer from us in the time frame.

Best regards

The ACME Company

Portal Case status dashboard frame

This use case can also come with case status dashboard for the customer, this is only applicable if the customer has been identified during the case creation and if the company is providing personalized portal capabilities to their customers. In this case, the Dynamic Case Management platform can provide a web dashboard with all the cases associated to this customer, as well as the status of these cases.

Any combination of the Case _Variables and case creation variables can be presented in this dashboard.

Case_ID, Case_Status, Case_Type, Case_SLA....

Note that the integration of this case status dashboard in the existing company portal is not covered in the scope of this use case. This integration can be done or by customer resources or partner resources.

CRM-Light- customer profile storing

The Dynamic Case Management platform comes with an out of the box CRM Light capability. It stores customer profile data, which can be used in this case management process (such as customer search, case report based on the customer).

Add External Party - Jane Doe

Save

Party Type: Customer Contact

External ID:

Name: Jane Doe

Email: JaneDoe@xxxx.xxx

Phone: 1234567890

Notes:

Additional Links

Link to User:

Group Work Basket:

Default Team:

Customer Information

Full Name		Address	
Solution: Mr.	<input type="text"/>	Address 1: How knows street 1	<input type="text"/>
First Name: Jane	<input type="text"/>	Address 2: <input type="text"/>	<input type="text"/>
Middle Name: <input type="text"/>	<input type="text"/>	City: LA	<input type="text"/>
Last Name: Doe	<input type="text"/>	State: California	<input type="text"/>
Social Security #: 11234567890	<input type="text"/>	Country: USA	<input type="text"/>
<input type="button" value="Add Another Address"/>			

In the scope of this use case allows for the addition of up to five fields to the default customer profile data template. Additional fields can be added but are subject to a separated quote.

User Interface & Reporting

Agent UI

AppBase Client Software Requirements	
Component	Requirements
Operating System	Windows 10, x86 or x64
.NET Framework	4.6
Browser	Microsoft Internet Explorer 11 and above Google Chrome

AppBase Client Hardware Requirements	
Component	Requirements
Processor	Intel i5, 2.6Ghz
RAM	6 GB RAM
HDD	512 GB

Reporting

Real-time Reporting

Real-time, interactive reporting in the browser is achieved with AppBase Dashboards.

Reporting capabilities rely on 3rd party tools to achieve Business Intelligence and Big Data Analytics. Specifically, DCM works primarily with JasperSoft.

Standard reporting provided:

- Number of cases open per Case
- Case status report Per Case Type
- Specific View on escalated Case

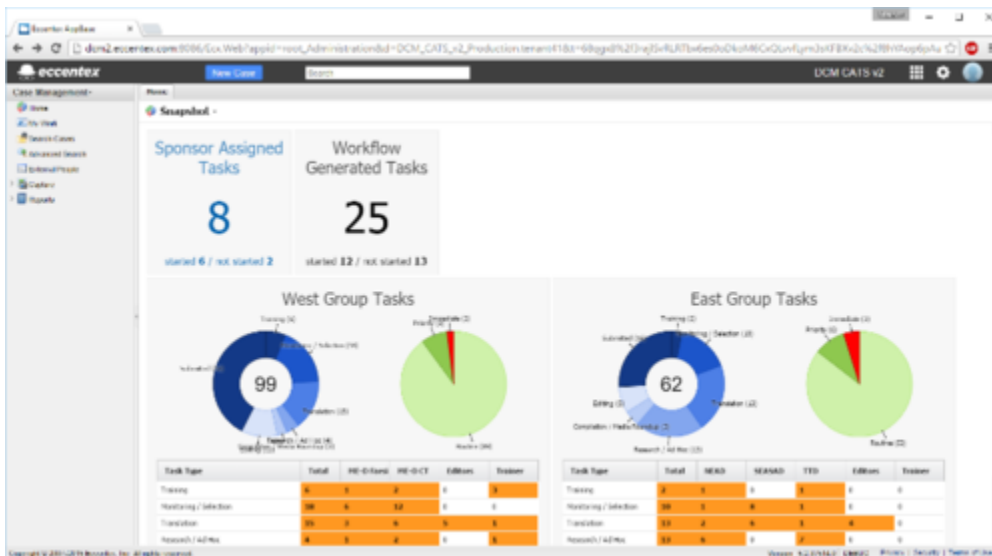
Historical Reporting

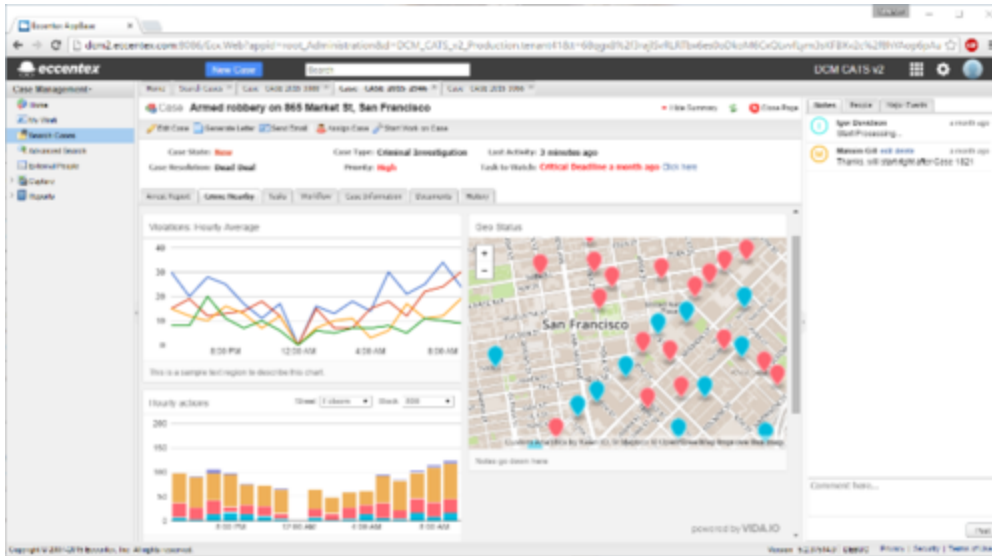
- Number of cases open, closed, escalated per Case type in a defined period
- Number of Cases closed per advisor in a defined period
- Number of cases manually escalated per case types and per Advisor in a defined period
- Report on closer times per case types in a defined period (+ average closer time per case types)

For more information, see [About Interaction Reporter](#).

Tuned reports

The Platform allows also the possibility to create tuned reports for the specific needs. Tuned reports, can be requested and will be subject to an additional Professional services Quote (out of scope of the standard Use Case). Samples of tuned reports:





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	<p>Digital</p> <ul style="list-style-type: none"> Genesys Work and Lead Distribution (BO02) Genesys Email Routing (CE16) Genesys Chat Routing (CE18) Genesys Digital Callback (CE22) Genesys SMS Routing (CE29) <p>Inbound</p> <ul style="list-style-type: none"> Genesys Call Routing (CE01) 	None

All of the following required:	At least one of the following required:	Optional	Exceptions
		<ul style="list-style-type: none"> • Genesys Callback (CE03) <p>Outbound</p> <ul style="list-style-type: none"> • Genesys Outbound Dialer (CE11) <p>Self-Service and Automation</p> <ul style="list-style-type: none"> • Genesys IVR Personalization (CE09) 	

General Assumptions

- Compatibility with DCM hardware and software requirements.
- Customer should allow access to the DCM Platform for their users, involved in the process.

This use case does not include any system integration. The case submission web form and web dashboard (provided in scope) will not be integrated into the existing web environment of the customer. On request of the customer, this integration could be done by Genesys resources, but this will be subject to a separate quote by Professional Services. Customer may also choose to implement this integration with its own or partner resources. The customer should provide the communication channel(s) for the customer notification (such as email, SMS and notification gateways). If the relevant notification channel(s) are available, the use case supports the following notification types:

- Email (requires customer email address)
- SMS (requires customer mobile number)
- Mobile notification (requires customer mobile number).

Note that Genesys can provide optional additional routing capabilities for these notification channels (see the Interdependencies section below for more info). This use case includes:

- One submission form,
- One case status web Dashboard form,
- Five case-types with one common case process.

If additional submission form(s), case dashboard(s) and/or case processes are requested they can be purchased as an add-on. Cases can be routed up to five different target group(s) of employees plus one escalation group. (If additional groups of employees are required they can be purchased as an add-on). The numbers of employees and supervisors are unlimited, but each agent and supervisor

should be equipped with a valid license.

The maximum number of information fields requested in the case creation (web form or agent creation form) is limited to 20. Each of these fields can be made mandatory or not and can be submitted to classical format verification (example: date format, drop-down list, membership number format...). Note that format validation should happen in DCM, as integration to external systems is out of scope of this use case. Note that Complex field validation algorithm can be supported but, in this case, the algorithm should be provided by the customer. This part of the code remains under the responsibility of the customer.

Document or photo upload is supported by default, so advisors and customer can attach digital documents to the case. DCM can also provide advance capabilities in these areas which are out of scope, such as: document scanning, indexing, image editing, format changes. These capabilities can be added to the customer implementation but will be subject to a separate quote by Professional Services. If required, this could be delivered as an add-on (this might also require additional licenses purchase).

No data upload is included to populate the CRM light information (this can be done or by the customer or by Professional Services but is subject to a separate quote).

Use Case Interdependencies

This use case can be sold as standalone. However, it is recommended to sell it with one of the Workload Management Use Cases. See *Interdependencies* section below to review the compatibility and the availability of the Workload Management use case.

- As stated earlier in this document, this use case supports notifications via email, SMS and mobile notifications. It is, however, the responsibility of the customer to provide access to the relevant gateways (email, SMS, mobile notification).

If direct communication is required between the customer and the case worker, it is recommended to select the relevant additional Genesys use cases to orchestrate the communication channels. This will ensure that:

- Customer replies are routed to the relevant Advisors,
- Customer interactions are stored in a central place: Universal Contact Server.
- Provide Advisors with an intuitive and easy to use desktop tool to initiate and professionally manage the interaction.
- Provide Standard response library

and many more capabilities, depending on the additional Use-Cases selected. Please find below a list of possible use cases for the different platform.

Note: This list is for the indicative purpose, contact your account team to get the list of relevant use cases for your configuration.

Benefits of Combining with Genesys Task Distribution use case and PureConnect

By combining the system of resolution that Eccentex provides with PureConnect system of engagement, the unified solution enables dynamic human based workflow to handle and automate the workflow. PureConnect provides the ability to engage with customers, handle exceptions that occur in the workflow and journey moments where work needs to be performed by an employee.

Customer Responsibilities

N/A

Document Version

- Version **V 1.0.0** last updated **March 27, 2025**

Genesys Call Routing (CE01) for PureConnect

Route voice interactions to the best skilled resource

What's the challenge?

When your customers or sales leads call, they want to speak with someone who can fulfill their needs quickly. If they encounter excessive wait times or do not connect to the best representative in real time, they encounter unnecessary transfers, hold time, and repetition. This experience can result in customer frustration or loss of a potential sale.

What's the solution?

Create a unified virtual contact center by connecting customers to the representative with the best fit. Genesys call routing uses skills-based routing to direct calls to the resource best equipped to help, whether in your contact center, back office, a branch office, an outsourcer, or anywhere else in the world.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

Organizations want to provide an exceptional customer and sales service experience by reducing transfers, hold time and repetition.

To achieve this experience, they need customizable software to fit complex rules, distributed using skills-based routing while automaticity capturing each call disposition for analysis.

When companies enable call routing within their Genesys environments, benefits can include:

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	Shorter wait times and more accurate resolutions by connecting inbound calls or leads to the best matched representative make better customer experiences and improve Net Promoter score
Improved First Contact Resolution	Captured omni-channel data is analyzed to drive process improvements to enable a superior customer journey and allows agents to be equip with the ability to handle calls on a First Contact basis.
Increased Revenue	The ability to route a sales call to the best skilled sales representative increases sales conversions.
Reduced Handle Time	Genesys' routing is far more efficient as it takes full customer context into consideration. This advantage in routing allows for more accurate and timely routing to the best agent to reduce wait time and costly mis-routes.
Reduced Transfers	Reduce the number of transfers due to better voice call routing through Genesys routing.

Summary

Customer wants to contact the company for a specific service or for further information around a product or offer and then calls the company. The system performs hours of operation, special day, and emergency checks, and then plays corresponding messages. The customer selects an option from a menu (prompt and collect) that maps to an agent skill expression. If no agents are available, the target expands to include an additional agent skill or skill-level before routing to an optional overflow number.

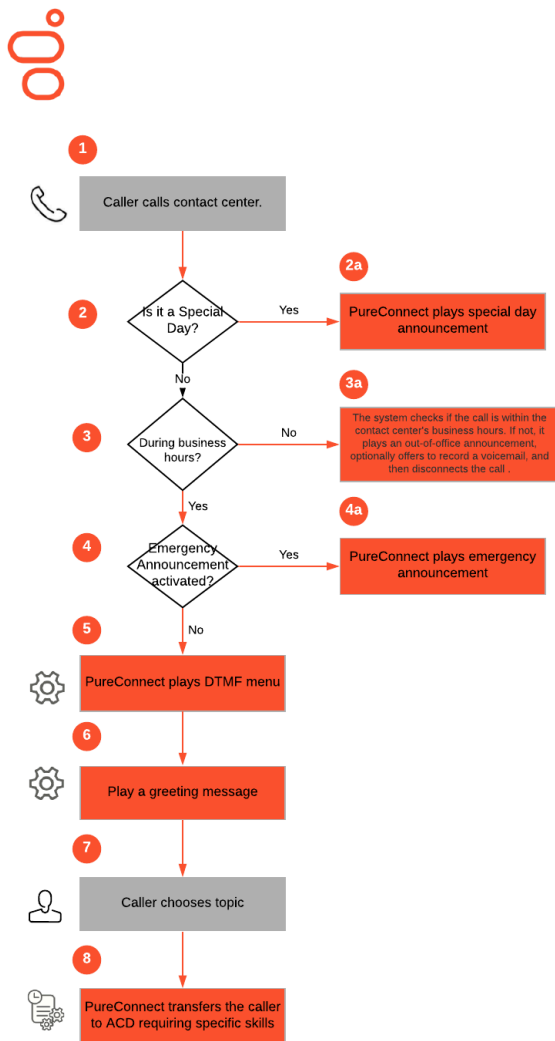
After the initial implementation, customers can enhance the service with more Genesys routing

capabilities.

Use Case Definition

Business Flow

The following flow describes the use case from the perspective of the main actors, that is the caller and contact center agent.



Business Flow Description

1. The caller initiates an inbound voice call to the contact center.
2. The system checks if the day is configured as a special day. In this case a special day announcement is played and the call is disconnected.
3. The system checks if the call is within the contact center's business hours. If not, an out-of-office announcement is played, a voicemail option is provided if desired, and the call is disconnected.
4. The system checks if an emergency announcement is activated. In this case an emergency announcement is played and the call is disconnected.
5. A call steering message (DTMF menu) is played with various menu options (optional).
6. A greeting announcement is played.
7. The caller chooses a menu option using DTMF tones entered on a handset. If the caller does not choose an option or chooses a non-available option, the menu can be repeated one or more times. If the caller still does not choose a valid menu option the call will be handled with default routing parameters.
8. The ACD system distributes the call to the best fit agent for the chosen topic based on the agent's skill and skill level (see [Agent Score Calculation](#) for details).

Business and Distribution Logic

Business Logic

This section describes the parameters Genesys uses to drive routing decisions and describes how these parameters are configured.

These operational parameters allow an administrator to configure a number of settings related to routing logic, including the target skills for each menu option, priority tuning, timers, and overflows.

Some parameters are only available at DNIS/Route Point level. These parameters are either needed only once at the beginning of the call flow (for example, greeting message), or they are used across the entire call flow independent of the caller's subsequent DTMF menu choices. Other parameters are available at both the DNIS/Route Point level (to be used if no call steering has been activated) and at the level of the choice of a specific touch point.

The following tables illustrate example parameters that are configurable through Genesys configuration tools.

Parameters to configure Service Line Announcements

The following parameters are configurable by service line:

Name	Description
Business hours	Sets the hours that the business is open and accepting calls.
Special day	A list of exceptions to the regular business hours for a holiday or other reason.
Emergency declared	Activates the emergency announcement (such as a power outage or general closure).

Parameters to define the Call Steering/DTMF Menus

This use case defines call steering options through multiple levels within the call flows. It also describes the menu options within each level. Four independent call steering flows are included: business hours, after hours, holiday, and emergency. Flows include up to two languages. Call steering for business hours flow includes a tree with 2 menu layers and up to 25 exit routing points. A caller's choice of DTMF menus and sub-options determines the service they need, and the agent skill required to best meet that need. After hours, holiday, and emergency call steering each includes a caller prompt and one exit routing point. An exit point may include items such as routing, voicemail, external transfers, or internal transfers.

Distribution Parameters

The parameters in the following list define the behavior of the distribution logic. These parameters are configurable according to the combination of possible DTMF choices in the call steering.

Name	Description
Workgroup	Primary ACD group that will receive the interaction

Name	Description
Skills	Secondary ACD group that will receive the interaction
Priorities	Value that defines the level of interaction importance

The skill expression that defines the target is a combination of workgroup, skill(s), and proficiencies. Best practice includes using all possible agents in the initial skill group. Agents may be configured with different proficiency levels to provide preferred assignments.

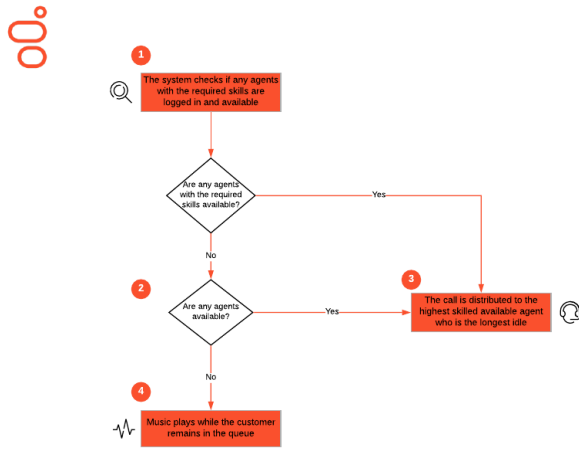
- Time in Queue: The amount of time the caller has been in queue waiting for the next available agent; this may be disabled on a workgroup basis.
- Priority: The configured priority level of the call; defaults to 50.
- Proficiency: The proficiency level configured for each agent.

Audio Resources

The following audio resources are configurable by service line:

Name	Example
Business Hours	A message announcing office closure and inviting to call again at opening time
Please Wait on Hold	A message inviting callers to wait
Welcome	A greeting message
Emergency	An emergency message
Special Day	A message announcing office closure due to special day (such as a public holiday)
Music waiting in queue	Music
Main DTMF Menu Message	The main Call Steering menu announcement
Sub-DTMF Menu Messages (multiple messages)	The sub-menu messages for the Call Steering menu as required

Distribution Flow



Distribution Flow Description

1. The system checks whether any agents corresponding to the requested skill and skill level are logged in. If no agents with the requested skill and skill level are logged in, the flow continues with step 4.
2. The system checks whether any agents are available.
3. If agents with the required skill/skill level are available, the call is distributed to the highest skilled available agent who is idle for the longest time.
4. If no agent is available, the system plays music while the caller is in queue.

Distribution Logic

The distribution logic includes the following functionality:

- The workgroups, skills, and priority are configurable by (final) DTMF choice.
- Proficiencies are configurable on the agent level.
- ANA functionality: If an agent does not accept a voice interaction, the voice call is automatically put back into the distribution flow after a time-out. The agent who did not accept the call is set to agent not answering.
- Blending with other media types is possible. Priority settings for voice interactions are configurable to enable proper priority ranges between different media types. Agent utilization is configurable for agents and agent groups to define which interactions can be handled in parallel (if any).

User Interface & Reporting

Agent UI

- Agents can view the workgroup, DNIS, ANI, caller name, and duration when the call is presented.
- Agents can transfer calls to other individual agents and workgroups.
- Agents can transfer calls to defined route points. The routing logic defined for these route points is similar to the routing logic defined above. Only route points to transfer calls are visible to agents in their desktop.
- Agent can set their availability status to influence routing.

Reporting

Real-time Reporting

- Out-of-the-box Marquee templates and IC Business Manager views are used. These include reports and widgets based on agent, agent group, and queue statistics.
 - The corresponding KPIs are available per (final) menu selection and per DNIS/Route Point (customer intent).
 - Calls deflected because of emergency condition, special day or outside of business hours are reported separately.
 - Calls transferred to an external number are reported separately.
- The availability status of each agent can be displayed.
- Alerts are configurable based on agent and workgroup statistics using upper- and lower-bound thresholds.

Historical Reporting

- IC Business Manager out-of-the-box reports for reporting on inbound voice calls and agents are used, including Queue Summary and User Productivity reports.
 - A report displays workgroup data broken down by the skill that was assigned on the call
 - Shows the total volume of calls that entered, were answered, or were abandoned.
 - Shows the total duration and average duration for talk, hold, and ACW.
 - The system gathers data for each agent regarding the volume of calls answered for each queue, and the duration of associated calls.

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 is based on the corresponding Functional Requirement Specification.
- Routing parameters are configurable through Interaction Administrator, Interaction Attendant, and Interaction Connect.
- Text-to-speech and speech recognition are not included.
- All customer input is via DTMF prompt and collect.
- There are no integrations with third-party systems.
- Customers must provide all prompts and audio files in .wav (8bit, mono, mu-law, 64kbps) format. Files will not be altered, converted, or otherwise edited.
- MPLS is an optional add-on for this use case.
- All data connectivity will be over Internet (secured).

Customer Responsibilities

N/A

Document Version

- Version **v 1.2.1** last updated **March 27, 2025**

Genesys Personalized Routing (CE02) for PureConnect

Apply personalized routing to voice interactions

What's the challenge?

When your customers call, they expect you to know who they are. If they are connected to employees who don't have any information about them or their previous interactions — resulting in unnecessary repetition, effort and time — your customer experience scores suffer.

What's the solution?

Create an effortless experience by recognizing a repeat customer and prioritizing a connection to the same agent who previously served them. Offer expected wait times and the convenience of self-service or a call back. Genesys Personalized Routing uses context-based routing to direct calls to the best resource.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

Callers expect a company to know who they are. Customer experience scores suffer when callers are connected to agents who don't have any information about them or their previous interactions — resulting in unnecessary repetition, effort and time.

This use case connects callers with the best-fit agent based on choices within the IVR, the type of request, and customer context. Routing parameters are configurable and flexible enough to achieve a variety of desired business outcomes.

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:

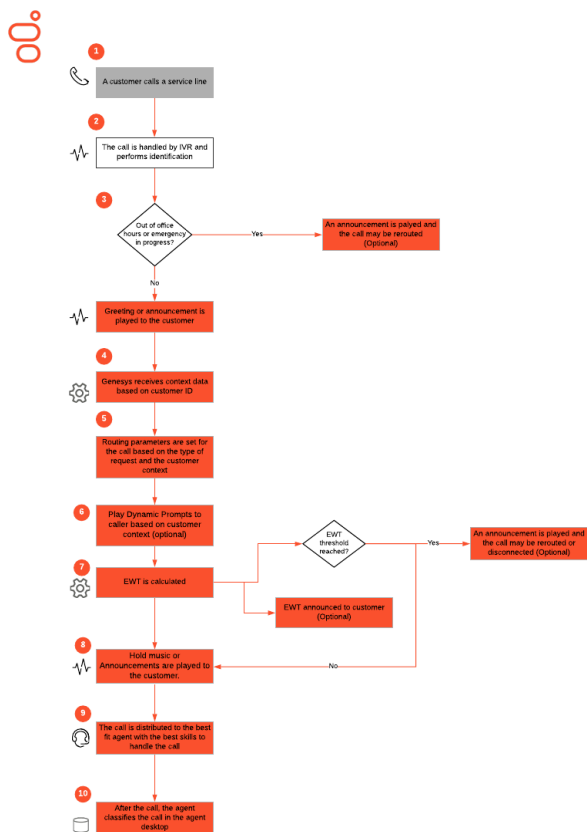
Use Case Benefits	Explanation
Improved Customer Experience	Offer better customer experience through routing to the most qualified agents based on the customer's context or through the ability to use virtualized agent pools to maximize agent resources across the entire enterprise.
Improved Employee Utilization	Improve routing to the best available agent through automated routing with context.
Increased Revenue	Route the right voice interactions to the most qualified skilled agent with better context.
Reduced Handle Time	Use enhanced context to reduce handle time.
Reduced Transfers	Improve routing of voice calls through personalized context routing.

Summary

A call is qualified within the IVR. The customer is identified and authenticated, if needed, within the IVR menu (not part of this use case). Based on the caller's choices within the IVR, the caller is routed to the best agent able to serve the request, which can potentially lead to additional services (for example, to realize up-sell potential). The logic of this use case is business rules driven and therefore flexible to changing needs and business environments.

Use Case Definition

Business Flow



Business Flow Description

1. Caller is transitioned from CE01.
2. The caller is routed to an IVR application that attempts to determine the caller's identity and service request. If explicit identification and verification are needed, CE07 provides this functionality.
3. If the call is outside of office hours or if an emergency situation is in progress, an announcement is played. The caller may then be reconnected or diverted to another number inside or outside of Genesys. If the call is within office hours, a greeting announcement is played.
4. Genesys retrieves context data about the caller based on identification.
5. If the contact center is open, the routing parameters for this call are set based on the type of request and the customer context. This enables flexible and personalized call handling.
6. Prompts may be played based upon customer context (optional)
7. The expected wait time (EWT) is calculated and announced to the caller (optional). If the EWT reaches a specific threshold, an announcement is played and the caller is disconnected or routed to another number inside or outside of Genesys (optional).
8. Hold music or additional announcements are played to the customer
9. The call is distributed to the best agent who:
 - Has the base skill(s) to handle the original request.
 - Has the supplementary skill(s) determined by the context (optional).
 - *Examples: Skills to up-sell a defined product, provide service to the customer, or specific empathy skills based on the customer segment or demographic*

10. After the conversation with the caller, the agent records the outcome of the call for reporting purposes, if they have acted on the presented lead.

Business and Distribution Logic

Business Logic

Emergency Check

Emergency mode activation is enabled at the IVR entry point for the call. Genesys runs a parallel stream to continually check if agents are logged in on the platform. If no agents are detected, then an emergency mode is automatically activated.

EWT Announcements

Announcement of expected wait time to customers is handled based on predefined recordings. It is a good practice to announce expected wait times in approximate language, to not mislead caller expectations.

Busy Treatment

Messages and music are played for calls in the queue. Any number of queue messages or hold music is configurable.

Skills

Genesys routing uses skills for enhanced routing logic and personalization. Skills are defined by caller-specific context data. For example:

- A caller calls the service hotline for “Account Transactions.”
- The caller successfully identifies and authenticates in the IVR. The corresponding data is passed to Genesys.
- In this case, the call should ideally be routed to an agent with the skills “Account_Handling” and the supplementary skill “Up-Sell” to ensure that the agent can handle both the original request and successfully convert the up-sell opportunity for the caller.

Skill level

Each agent has one or more skills associated to their profile, referred to in this use case as proficiencies.

Priority Model

Different priorities are set for calls according to business value of the type of request. If priorities are set and an agent becomes available, Genesys distributes the call with the highest priority matching the agent's skills. This is specifically relevant if the agent can receive interactions for different types of request. The priority of a call is increased over time to make sure that low-priority calls are still distributed to an agent after a potentially longer waiting time (priority tuning). Priority tuning is

configured by defining the beginning priority value for the interaction.

These values are configurable at the point where the caller enters the workgroup queue.

Transfer

The agents can transfer calls to defined internal agent groups or business lines. The routing logic defined for these route points is similar to the routing logic defined above (without initial announcements). Only transfer route points are visible in the PureConnect Client.

Additional functionality

- RONA (Redirect On No Answer)-functionality: If an agent does not accept the call, the call is automatically put back into the distribution flow after a time-out. The agent is set to not ready.
- This use case can be combined with other non-voice use cases. Blending is possible. The configuration of priority values need to be synchronized with priority settings for other media types to allow an ordering of interactions within the universal queue, according to business requirements. Capacity rules are configurable for agents and agent groups to define which interactions are handled in parallel (if any).

Context Service Data

The Genesys IVR can use database dips, REST, or SOAP requests to third-party systems to gather additional information about the caller while the caller traverses the IVR. This data is usable for more advanced IVR routing and decision-making. This capability would be incremental and is not included as part of standard Professional Services delivery.

Parameters available per type of request / service

The following is a list of business parameters that are configurable by service. These are configured in Genesys Interaction Administrator and Interaction Attendant. Note that the list is not exhaustive as additional parameters for technical settings might be required. The list does not reflect the technical realization and naming conventions to be used. Also, some of the parameters are combined for ease of readability. The list is intended for business readers to give an overview of the flexibility in the configuration of the routing logic.

Name	Description
After Hours Message	Message played if the call is outside of business hours
Emergency Flag	Flag to set emergency status for the service
Emergency Message	Message played in emergency situations
Enable Profile	Flag to indicate if this Profile is enabled. If not enabled, the Default Profile is used instead
EWT Flag	Flag to determine if EWT is announced to a customer
Open Hours	Sets the open hours of the service
Schedule	Defines the dates/times when certain IVR logic should be followed <i>Example: Holiday scheduled</i>

Special Day Message	Message played if the call is on a special day
---------------------	--

Parameters available per customer context and type of request/service

The following is a list of business parameters that are configurable by service and customer context. Default values for these parameters are configured by Genesys Interaction Administrator or Interaction Attendant. These base parameters are overwritten by parameters defined by rules using additional customer context. The list is not exhaustive as additional parameters for technical settings might be required. It also does not reflect the technical realization and naming conventions to be used. The list is intended to give business users an overview of the flexibility in the configuration of the routing logic:

Name	Description
Skill	Skill(s) required for this call
Workgroup	Primary ACD group that will receive the interaction

Reporting Parameters

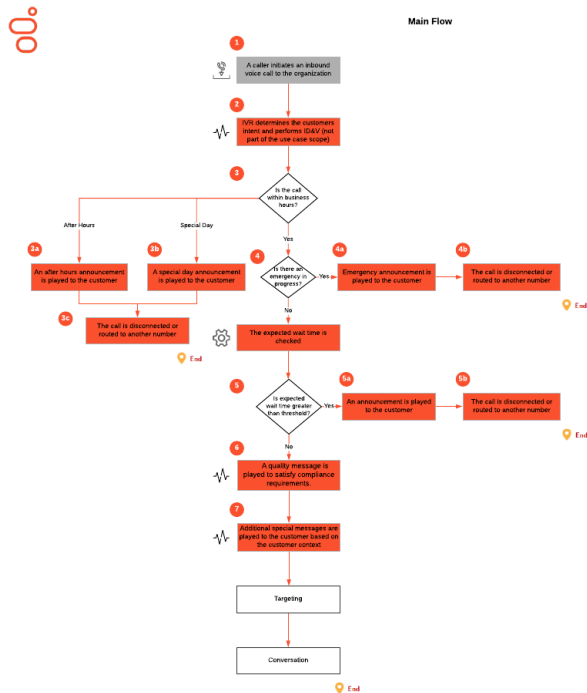
The following business parameters represent reporting categories and they are completely customizable to a company's business model. An administrator can assign different combinations of these parameters to each of the inbound and distribution parameter groups. The assignments can distinguish them in reporting and enable identification of the unique properties of the parameter group.

Name	Description
Profile	Where caller enters IVR
Schedule	Route in Profile taken to determine system schedules
Nodes	Each configured decision point throughout the IVR

Parameters to define the Call Steering

This use case defines call steering options through the use of conditional evaluations based on customer context. At each evaluation, a followup action is carried out to personalize the IVR experience for the caller. These actions may include playing prompts, setting dynamic workgroups or skills, or taking different menu paths based on who the caller is (requires CEO1). The base use case includes up to 8 evaluations, each one including a follow-up action. The use case supports up to two languages. Additional evaluations may be included within this use case through expanded scope or Project Change Request.

Distribution Flow



Distribution Flow Description Main Distribution Flow

1. The caller calls one of the contact center numbers.
2. The IVR determines the type of request (or service) and the customer ID (out of scope for this use case).
3. Genesys performs a check if the call is within the business hours for the requested service. The call may be:
 - Within business hours
 - After hours
 - On special days (e.g. public holidays)
4. Genesys checks if an emergency condition is activated for the call. In this case, a corresponding announcement is played and the call is either disconnected or deflected to a different number inside or outside of Genesys for further processing.
5. The expected wait time is calculated. If the expected wait time is beyond a configured threshold, a corresponding announcement is played and the call is either disconnected or deflected to a different number inside or outside of Genesys for further processing.
6. A quality message is played to satisfy compliance requirements.
7. Special messages, which depend on the type of request and the context, are played.

Conversation Flow

1. The agent handles the caller's request.
2. The caller may not have identified and verified up front, but the request may require identification and potentially verification. In this case, the agent can

handle this manually via a third-party system (outside the scope of this use case).

3. Once the caller is identified and verified, the agent can update the customer ID and verification status in Genesys. The customer context is retrieved from Genesys and displayed to the agent.
4. After the conversation, the agent can set the call outcome including the information about whether they acted on a specific lead (if part of the caller's context data). This information is used for reporting purposes.

Distribution Logic

Call Qualification and Customer Identification (outside of the scope of this use case)

As a prerequisite for this CE02 use case, call qualification and customer identification are handled by an IVR application before the start of this use case. This IVR application is outside the scope of this use case. Use case CE07, Effective Identification & Validation in IVR, can be used for this functionality. The CE02 use case assumes that Genesys receives the following information from the IVR:

- Type of Request / Service (either via DTMF, natural language recognition or IVR intelligence)
- Caller language
- Caller identification
- Information on the status of the identification:
 - Anonymous
 - Identification provided
 - Identification and verification (ID&V) provided
 - Customer ID -The customer ID might be any ID as used by the organization that identifies the caller. Alternatively, the CLI is usable for caller identification, but is less reliable.
 - This input determines the parameters for the specific call.

Remark on naming convention in this document:

“Type of request/service” is the mapping of a call to the caller's need using an IVR pre-qualification, such as a DTMF menu. Therefore, it may be more granular than a published service number for the contact center, or a department within the contact center (for example, sales or billing). The latter is sometimes also referred to as service within some organizations. However, in this use case, “service” is used interchangeably with “type of request” and refers to the more granular definition.

User Interface & Reporting

Agent UI

- The agent can view the workgroup, DNIS, ANI, caller name, and duration when the call is presented.
- Agents can transfer calls to other individual agents and workgroups.
- The agents can transfer calls to defined route points. The routing logic defined for these route points will be similar to the routing logic defined above. Only route points to transfer calls will be visible to the agent in their desktop.
- The agent can set their availability status to influence routing.

Reporting

Real-time Reporting

- Out-of-the-box Marquee templates as well as Interaction Center Business Manager views will be used, which include reports and widgets based on Agent, Agent Group and Queue statistics.
 - The corresponding KPIs will be available per (final) menu selection and per DNIS / Route Point (customer intent)
 - Calls deflected because of emergency condition, special day or outside of business hours will be reported separately.
 - Calls transferred to an external number will be reported separately
- The availability status of each agent can be displayed
- Alerts can be configured based on agent and workgroup statistics using upper and lower bound thresholds

Historical Reporting

- IC Business Manager out-of-the-box reports for reporting on inbound voice calls and agents will be used, including Queue Summary and User Productivity reports.
 - Display workgroup data broken down by the skill that was assigned on the call
 - Show the total volume of calls that entered, were answered, or were abandoned.
 - Show the total durations and average durations for talk, hold, and ACW.
 - Gather data for each agent regarding the volume of calls answered for each queue, and durations associated with them.

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
Inbound <ul style="list-style-type: none"> Genesys Call Routing (CE01) 	None	None	None

General Assumptions

N/A

Customer Responsibilities

- The IVR application to determine the type of request and customer ID is not part of this use case and has to be provided separately.
- All announcements are to be provided by the customer.
- Routing parameters are configured through Interaction Administrator and Interaction Attendant.
- IC Business Manager is used for historical reporting.
- Interaction Desktop or Interaction Connect is used as the agent desktop.
- IC Business Manager is used for real-time reporting.

Document Version

- Version **ver 1.0.2** last updated **March 27, 2025**

Genesys Callback (CE03) for PureConnect

Offer callback to queuing callers

What's the challenge?

When callers wait in long queues, customer frustration with your brand goes up right along with your abandonment rate. However, always keeping staff at peak performance level is costly and inefficient. You need a way to distribute calls during peak times to meet your service levels and keep callers happy.

What's the solution?

An alternative to waiting on hold can make the difference in a customer's experience. After a threshold of time, give callers the wait time and the option of receiving a callback. Now you can deliver higher customer satisfaction without maintaining a peak-level staff.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

This functional use case enables you to improve customer experience by providing wait time information and callback functionality. Depending on the length of the wait time, the system can play different messages and provide optimized customer experiences for various situations. You can specify the upper wait time threshold and the automatic transfer out of queue behavior based on the business. You can monitor the outcome of caller behaviors using reports and quickly adjust the settings if required.

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	Offering callback and providing wait time information during busy times rather than keeping customers on hold improves the customer experience.
Improved Employee Utilization	Smoothing of inbound call volumes with offer of callback during busy times improves employee utilization.
Improved First Contact Resolution	Offering callback reduces the instance of follow-up and repeat calls by customers who have previously abandoned.
Reduced Handle Time	Customers who have not been kept on hold are less likely to spend time 'venting' in frustration, so reducing handle time.
Reduced Interaction Abandonment	Setting customer expectations about wait time with the offer of a callback reduces abandonment rates.

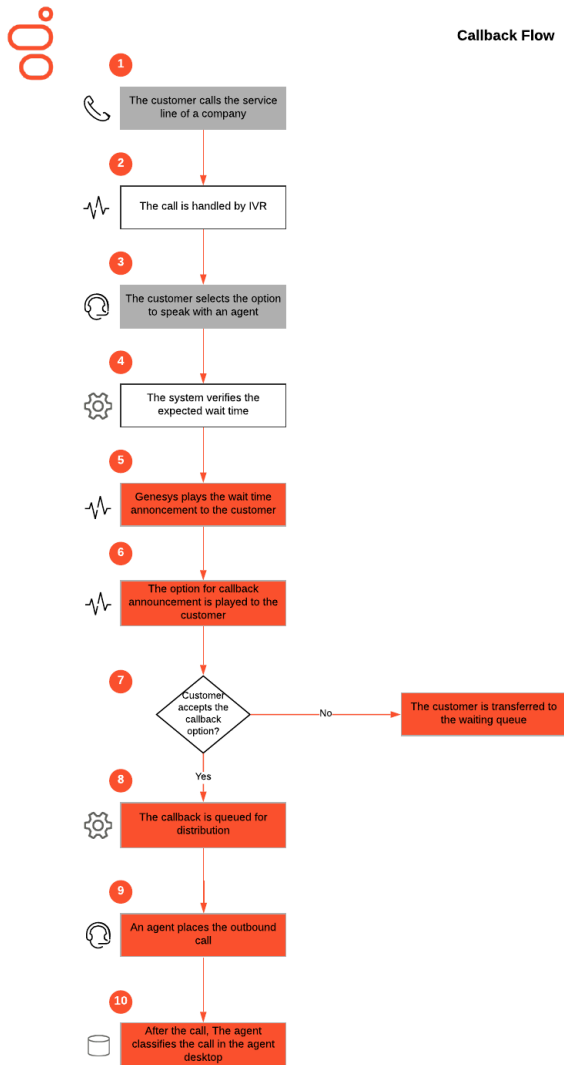
Summary

Enhance your IVR application with the possibility to offer a callback. For example, if the customer has chosen to transfer to a representative but a long wait is expected, they can hear a message letting them know the estimated wait time along with an offer to receive a callback later.

Use Case Definition

Business Flow

Callback Flow



Business Flow Description

1. A customer calls a service line of the company.
2. The call is handled by the IVR
3. At some point the customer needs assistance and chooses a menu option for agent transfer. The type of request and the agent skill(s) necessary to handle the call are determined by logic applied when the caller leaves the IVR.
4. The system verifies the expected wait time for the particular request. If the wait time is below the thresholds, the caller is immediately transferred to the corresponding queue to wait for an agent with the requested skill(s) necessary to handle the call.
5. If the expected wait time is above the threshold, the system plays a wait time announcement to the caller. This can be a generic announcement or the amount of estimated wait time rounded to minutes.
6. After the announcements, the option for callback is announced to the customer.
7. If the customer does not accept the callback, the call is transferred to the corresponding waiting queue. In case the customer accepts the callback offer, the system continues with the registration of the callback.
8. When the callback interaction is next in queue, it is presented to the agent to place an outbound call.
9. Agent places the call.
10. After the conversation between the agent and the customer, the agent can classify the call for reporting purposes via their agent desktop.

Business and Distribution Logic

Business Logic

Callback Offering and Registration This section describes the business rules which drive the decisions made by the voice application, such as how the business rules are configured. The voice application verifies the estimated queue wait time for the type of request before transferring a call. The returned wait time is checked against the user specified settings:

- **Automatic transfer threshold:** If the expected wait time is less than this threshold, the call is automatically transferred to an inbound queue. The logic and business rules used to distribute the call to an agent from this queue are not part of scope of this use case.
- **Upper wait time play back threshold:** If the expected wait time is in between the automatic transfer and the upper wait time play back threshold, the expected wait time is announced to the customer (rounded to minutes). If the business prefers not to announce an expected wait time, a generic message can be played instead. After this announcement a callback is offered to the customer.
- If the wait time is greater than both thresholds, a generic message is played before offering callback to the customer.

The business can configure the messages played and the thresholds.

Callback The following parameters are configurable for the callback logic:

- Voice prompts for announcements / treatments for the callback

It is possible to assign a priority to callback requests. This is important in the case when this use case is combined with other inbound media types (e.g., chat or e-mail).

These parameters are configurable per type of request. The type of request is determined by the point in the IVR where transition from self-service to assisted service is required. It is defined by the auto attendant application using this callback functionality.

Distribution Logic

Distribution logic to define IVR callbacks Included in this use case is the addition of a single logical callback point within the IVR, with a single inclusion of the business logic. Additional instances of this use case may be added for expanded callback use.

Distributing transfer calls to agents This functionality is outside the scope of this use case. The solution will transfer the call to an existing queue for inbound voice routing and will leverage existing inbound voice routing functionality.

Distributing callback requests to agents

The following lists the minimum functionality for distributing a callback generated from the IVR to agents:

- Routing of callback requests to agent is based on agents' workgroup and skills. The required skills for a callback request depend on the type of request and the language. The mapping between subject and workgroup and skills is configurable.
- If this use case is used in combination with other use cases for inbound interactions of a different media type: Blending with other media types is supported including configuration of capacity rules.

User Interface & Reporting

Agent UI

The following lists the minimum functionality for the agent's callback interface:

Customer phone number

Disposition Codes to classify call and call outcome for reporting purposes

We assume that this use case is used in addition to existing inbound voice functionality, so all agent desktop functionality available to handle inbound voice calls as part of this use case will also be available for handling callbacks.

Reporting

Real-time Reporting

PureConnect provides callback queue statistics (offered, answered, abandoned, service levels, etc.). A callback interaction is an interaction type just like calls, chats or emails.

Historical Reporting

PureConnect provides callback queue statistics (offered, answered, abandoned, service levels, etc.). A callback interaction is an interaction type just like calls, chats or emails.

Additional statistics are available with Professional Services customizations.

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	Inbound <ul style="list-style-type: none"> • Genesys Call Routing (CE01) • Genesys Personalized Routing (CE02) 	None	None

General Assumptions

Preconditions

This use case contains only the functionality described in CE03, which can be integrated in existing voice (self-service) applications. This additional voice application functionality is not part of this use case.

The use case contains the functionality to transfer the caller directly to an agent without callback. This functionality consists of transferring the call to a route point / queue. The routing functionality for these calls is not part of the scope of this use case; rather existing inbound voice routing capability will be leveraged. Similarly, existing queues will be used to determine the expected wait time. The routing logic for these inbound voice calls needs to be implemented in Genesys.

This capability can be provided by one of the following use cases:

- Genesys Call Routing (CE01) for PureConnect
- Genesys Personalized Routing (CE02) for PureConnect

Customer Responsibilities

NA

Document Version

- Version **ver 1.0.1** last updated **March 27, 2025**

Genesys Customer Authentication (CE07) for PureConnect

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.

Other offerings:

Genesys Cloud Genesys Engage on-premises

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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 on to the agent, store. 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:

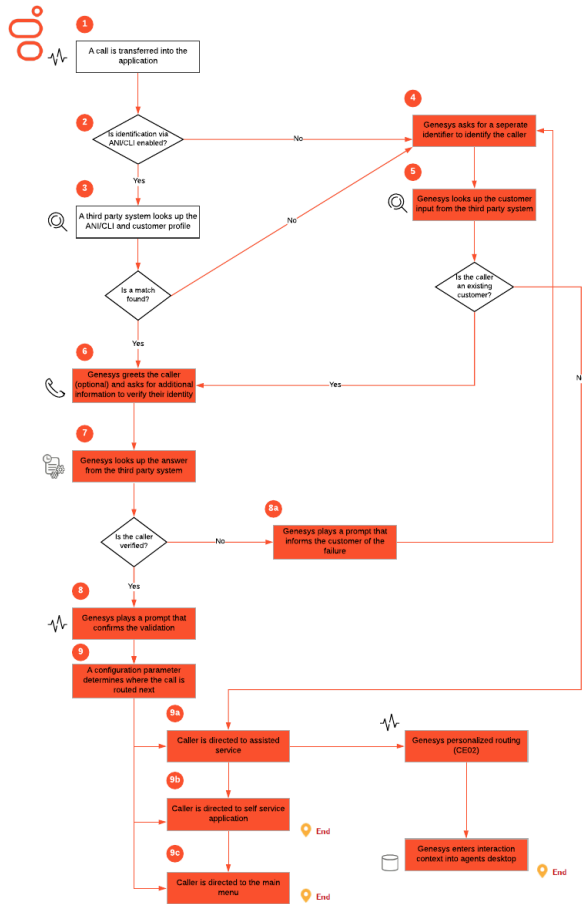
Use Case Benefits	Explanation
Improved Containment Rate	Reduce agent handled inbound call volume by improving containment rate through a robust and flexible solution
Improved Customer Experience	Improve NPS by saving the customer time through efficient and automated ID&V interaction*
Reduced Handle Time	Reduce agent handle time by partial automation of the calls through identification and verification (ID&V) with IVR
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 data captured by the IVR is displayed to the agent, providing a better experience for both the caller and agent.

Use Case Definition

Business Flow



Business Flow Description

1. Call is transferred into the application. This self-service module can be integrated into a broader IVR application. The call is answered by this application. 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 identifies a customer using the Automatic Number Identification (ANI) / Caller Line Identification (CLI). (Reference Business Logic 1 - BL1)
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 asks 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 successfully validated, the customer is forwarded to agent assisted service.
6. If a customer match is found, Genesys asks for additional information validating the caller's identity for security purposes. This question requires 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 is routed to next. The possible options are listed below. However, these options are outside the scope of the ID&V use case:
 - Agent assisted service - the result of the identification and verification is displayed to the agent, making both the customer and agent experience better. This functionality requires implementation of the use case Genesys Personalized Routing (CE02) for PureConnect.
 - Self service IVR - such as transfer funds or 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. (Reference Business Logic 2 - BL2)

Business and Distribution Logic

Business Logic

BL1: Customer identification by ANI / CLI - Step 3 in the business flow above can be enabled or disabled depending on specific customer requirements. If this step is disabled, the flow always asks for a customer identifier (for example, customer ID, account number, or tracking number). This parameter can be set per company service line.

BL2: Configuration to define the next steps - After successful identification and verification, the call is transferred to the next step of the overall call flow. 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 Genesys Personalized Routing (CE02) for PureConnect use case:

- If the call is transferred to agent-assisted services: The agent receives an indication whether the customer is
 - Identified and verified
 - Identified only
 - Neither identified nor verifiedCustomer identifier and name are displayed to the agent as well (if available and required).

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

- Report that indicates the number of customers proactively identified by ANI/CLI
- Report that indicates the number of customers successfully identified and verified themselves
- Report that indicates the number of customers who were unsuccessful in identifying and verifying themselves

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

General Assumptions

The company has a database that can be used to identify their customers. This database must provide the appropriate web services and must be web accessible.

- The company provides access to an application to validate the customer identity.
- The company must have a unique identifier for each customer.
- 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.
- Genesys Intelligent Automation supports Nuance if ASR and TTS is required.

Document Version

- Version **ver 1.1.2** last updated **March 27, 2025**

Genesys Voice Payment (CE08) for PureConnect

Capture payments in your IVR

What's the challenge?

Customers expect convenience and demand data security. They want the option of phone payment with the assurance of cardholder protection. If you don't accept card transactions by phone, you lose money. And if you don't exceed data security standards, you put your customers — and your business — at risk.

What's the solution?

Ensure secure interactions with a PCI-compliant solution that protects credit card data submitted to your automated IVR system or to an agent. Protect against fraud and preserve trust while still providing a flexible customer experience.

Other offerings:

Genesys Cloud

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Use Case Overview

Story and Business Context

This functional use case enables companies to use Payment Capture capabilities to provide PCI PA-DSS certified payments out-of-the-box (PCI PA-DSS = Payment Card Industry - Payment Application Data Security Standard). Dynamic treatment is applied so that only relevant questions for the card are asked. The use case can be deployed in fully automated or agent-initiated mode.

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	Offer customers the option of agent-assisted or fully automated phone payments.
Increased Revenue	Improve revenue collection through speed to market and established best practice
Reduced Deployment Costs	Lower cost of deployment by reducing deployment time versus traditional IVR builds through pre-built IVR application modules
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.
Reduced Penalties and Fines	Reduce fraud related penalties by using a PA-DSS certified application

Summary

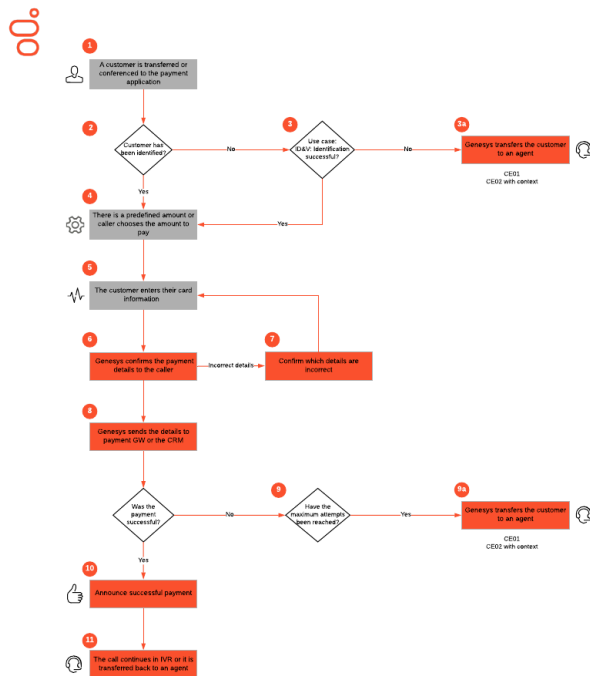
This use case provides the ability to quickly add a PA-DSS certified Payment Capture MicroApp** to a call flow to capture payments. The Payment Capture Microapp integrates with a third-party payment gateway to complete the payment. The application includes automatic card type detection and applies appropriate rules for collection and validation of the card data. Payments can be agent-assisted or fully automated.

** Microapps provide a range of capabilities whose functionality is both highly focused and task-based, thus enabling users to quickly get in, interact, and get out of it. In the personal and business spheres, end users clearly benefit from an application interface that is tailored to their specific use case.

Use Case Definition

Business Flow

(1) The following flow describes the use case from the perspective of the main actors, especially customers.



Business Flow Description

1. A customer is transferred to the payment application by another IVR application. (outside of the scope of this use case). The requested payment amount is transferred to the payment application.
2. The system checks whether the Customer has been identified. If not, the customer is routed to a separate application for Identification and verification. This functionality is covered by a separate use case, [Genesys Customer Authentication \(CE07\) for PureConnect](#)
3. If identification and verification succeeds, the customer moves to the next step. If not, the customer is transferred to an agent with context.
4. The system determines if the caller is to pay a predefined amount or if the caller is permitted to enter the amount they wish to pay. If the latter, the system then enables the customer to enter a payment amount. The system checks if the entered amount is within allowed values before proceeding. The system can also allow the caller to choose to pay the full amount.
5. A voice prompt is played to ask the customer to enter their card details. The following happens:
 - The customer enters their card number.
 - The system checks if it is a valid card number and what type of card it is (the list of allowed card types is configurable). Finally, depending on the type of card, the customer is requested to provide further details (such as expiration date and CVV code).
6. The system plays back the payment details and asks the caller to confirm so that the payment can be processed. The caller will

state whether the details entered are correct or incorrect. The option to read back only the last 4 digits of the card number is configurable.

7. If the caller states that the payment details are incorrect, the system asks the caller which of the previously entered information (such as card number or expiration date) was incorrect. Based on the caller's choice, the system asks for the information again before returning to the confirmation step.
8. If the caller states that the payment details are correct, the system accesses the payment gateway or CRM to process the payment. This will either be rejected or successful.
9. If rejected, the customer can re-enter their card details until the maximum number of rejections is met, then the Customer is transferred to an agent with context.
10. If the payment is successful, Genesys plays an appropriate announcement to the customer and at this point, dynamic information, such as a transaction reference or order number, can also be played.
11. The call transfers back and continues in the IVR application. The result of the payment is attached to the call for further processing.

Business Flow

(2) Agent Conference Scenario

Business and Distribution Logic

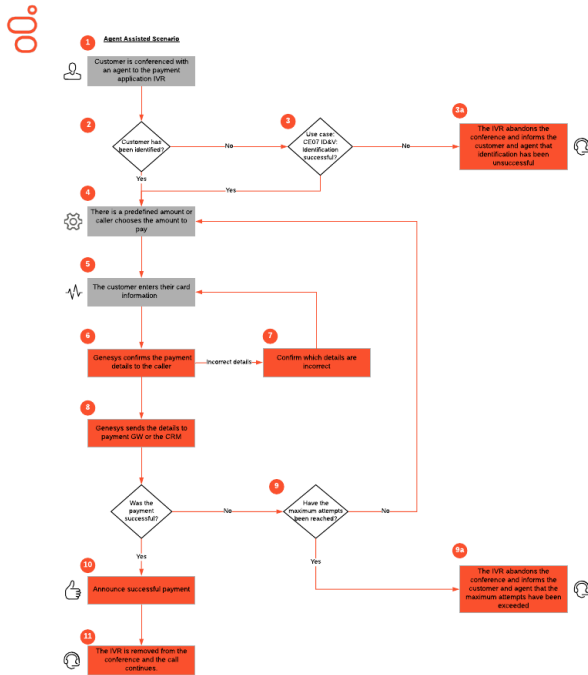
Business Logic

This section describes the business rules that drive the decisions that the Genesys system makes within the payment capture application, such as how the business rules are configured.

Parameters to be passed to the payment application

The payment application requires the following parameters:

1. Customer or Account Identifier (mandatory)
2. Outstanding Balance or Payment Amount (mandatory)



Business Flow Description

1. A customer is transferred to the payment application by conference from an agent with DTMF (Dual Tone Multi Frequency) clamping enabled. The agent is part of the call. The requested payment amount is transferred to the payment application.
2. The system checks whether the Customer has been identified. If not, the customer is routed to a separate application for Identification and verification. This functionality is covered by a separate use case, [Genesys Customer Authentication \(CE07\) for PureConnect](#).
3. If identification and verification succeeds, the customer moves to the next step. If not, the IVR is removed from the conference, and the customer and agent continue their conversation.
4. The system determines if the caller is to pay a predefined amount or if the caller is permitted to enter the amount they wish to pay. If the latter, the system then enables the customer to enter a payment amount. The system checks if the entered amount is within allowed values before proceeding. The system can also allow the caller to choose to pay the full amount.
5. A voice prompt is played to ask the customer to enter their card details. The following happens:
 - The customer enters their card number.
 - The system checks if it is a valid card number and what type of card it is (the list of allowed card types is configurable). Finally, depending on the type of card, the customer is requested to provide further details (such as expiration date and CVV code).
6. The system plays back the payment details and asks the caller to confirm so that the payment can be processed. The caller will state whether the details entered are correct or incorrect. The option to read back only the last 4 digits of the card number must be enabled as the agent is part of the conference.
7. If the caller states that the payment details are incorrect, the system asks the caller

3. Payment Merchant ID (optional)

4. Payment Reference (optional)
5. Call type Conference (required if payment attempt is agent-assisted)

Configuration Settings

The following parameters are configurable within the system:

- The minimum payment amount (required). For payment requests below this amount, there is an error flow where the customer is asked to enter the amount they want to pay.
- The maximum number of declined payments allowed before exiting the flow.
- The result to return when the maximum attempts are reached, possibly to send the call to an agent or initiate some other handling.
- The types of cards that are allowed for payment (such as Amex and Visa)
- The currency of the payment.

Distribution Logic

N/A

User Interface & Reporting

Agent UI

N/A

Reporting

Real-time Reporting

Available KPIs:

- Number of times the payment application was entered
- Number of times a payment was successful
- Number of times a payment was unsuccessful
- Number of times payment was attempted
- Number of times a caller hung up within the payment application

which of the previously entered information (such as card number or expiration date) was incorrect. Based on the caller's choice, the system asks for the information again before returning to the confirmation step.

8. If the caller states that the payment details are correct, the system accesses the payment gateway or CRM to process the payment. This will either be rejected or successful.
9. If rejected, the customer can re-enter their card details until the maximum number of rejections is met, then the Customer is transferred to an agent with context.
10. If the payment is successful, Genesys plays an appropriate announcement to the customer and at this point, dynamic information, such as a transaction reference or order number, can also be played.
11. The IVR is removed from the conference and the customer and agent continue their conversation. The result of the payment is attached to the call for further processing

- Average duration of task per outcome

Historical Reporting

Available KPIs:

- Number of times the payment application was entered
- Number of times a payment was successful
- Number of times a payment was unsuccessful
- Number of times payment was attempted
- Number of times a caller hung up within the payment application
- Average duration of task per outcome

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
Self-Service and Automation <ul style="list-style-type: none"> • Genesys Customer Authentication (CE07) 	None	Inbound <ul style="list-style-type: none"> • Genesys Call Routing (CE01) • Genesys Personalized Routing (CE02) 	None

General Assumptions

- The integration between Genesys Intelligent Automation and the payment gateway (or CRM or other system used to process the payment) is provided by the customer/partner. This is an XML over HTTP(S) interface which typically requires a small translation layer between Genesys Intelligent Automation and the backend systems in order to ensure the required data contract is met.
- Certification of the full PCI environment is outside the scope of this use case.
- Audio prompts:
 - Genesys recommends that pre-recorded prompt recordings be used for any dynamic playback of information such as payment amounts, or order numbers, as this provides a higher quality caller

experience than using text-to-speech.

- Sellable item Concatenated Prompts Recordings is the preferred option.
- TTS is optional for playback of prompts.
- Input modes:
 - If the agent initiates payment capture by conferencing the customer with the IVR, customer inputs areDTMF only. DTMF clamping is used to prevent the agent from hearing DTMF inputs.
 - If payment capture is initiated from IVR, customer inputs can be voice or DTMF,

Genesys Intelligent Automation requires PureConnect Voice XML Interpreter Server, Certification of the full PCI environment is outside the scope of this use case, Customer will provide access to XML/HTTP(S) interface for integration to Payment Gateway

- Payment Gateway Integration occurs via http(s) post web-service.
- PCI compliancy is handled in Cloud.
- Use case may use DTMF or ASR.

Document Version

- Version **v 1.0.2** last updated **March 27, 2025**

Genesys IVR Personalization (CE09) for PureConnect

Increase self-service by personalizing your IVR

What's the challenge?

When your customers call in to service themselves, they want to get off the phone as soon as possible. Giving customers options that confuse more than help slows the process, causes frustration and leads to more agent interactions.

What's the solution?

Deliver a great experience and increase self service adoption by helping customers navigate the IVR quickly. Genesys IVR Personalization tailors messages, menus and treatments based on who the customer is and why they are calling, also taking capacity into account.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

IVRs have historically been designed to maximize the containment of callers to reduce staffing costs associated with increased call volume, often without a careful assessment of customer experience. This has led to deep and complex IVR menu trees that frustrate customers, create an undesirable customer experience, and result in high opt-out rates. IVR personalization addresses the following:

- Simplifies the menu structure (both depth and within a single menu)
- Presents meaningful options to the caller
- Increases containment and use of the IVR through ease of use and relevance of options
- Increases customer satisfaction through simpler, more relevant navigation and completion of tasks IVR personalization is proven to increase self-service rates and improve customer experience.

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	Help customers service themselves quickly and easily so they don't want to speak to an agent.
Improved Customer Experience	Improve customer experience by reducing IVR handle time, which in turn improves Net Promoter Score (NPS). Increase self-service by presenting customers with proactive messaging based on context
Improved First Contact Resolution	Improve first contact resolution by using dynamic menus to more accurately offer the right self-service or route to the right agent
Reduced Handle Time	The time required to address a customer inquiry or request is optimized.
Reduced Interaction Abandonment	Reduce number of callers abandoning while in queue by enabling easier to use IVR.

Summary

Customers presented with personalized menus and messages are more likely to self-serve. This functional use case lists several types of personalization as follows:

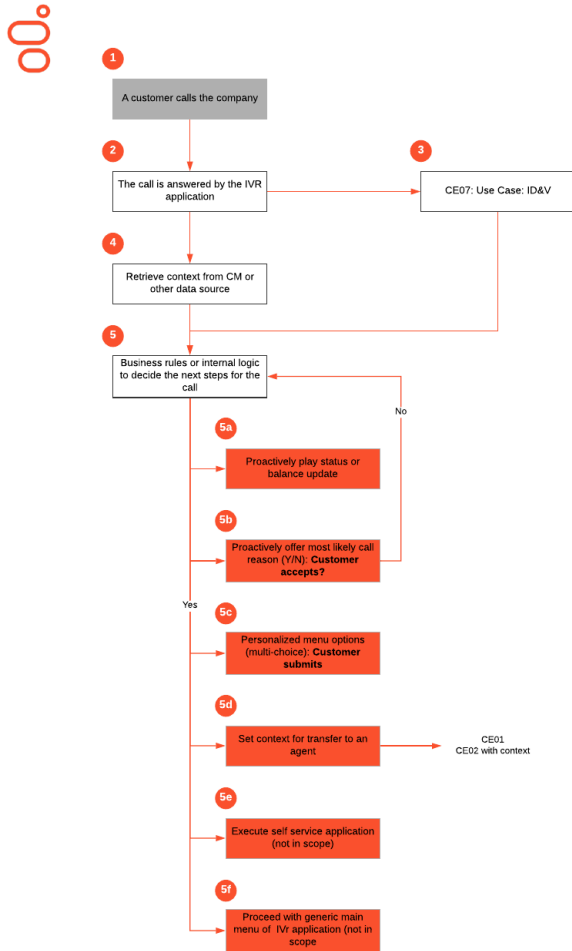
- Proactively play status or balance before presenting any options. For example "Your next order is due to be delivered on Thursday."
- Proactively offer most likely call reason. For example, "Are you calling about the loan application you

have in progress?”

- Personalize menu options. For example, play a mortgage option in the menu only if they have a mortgage, or present a promotion option only if they are eligible.
- Persona-based personalization is the ability to change the wording of input and messages based on language or customer context, such as age. These types of personalization can lead to an increase in self-service rates. They can also improve customer experience by shortening the time spent on the IVR or bypassing self-service based on the context of the customer’s call. The context to drive this personalization can be retrieved from native or from third-party data sources. Personalized IVR can also update customer context so that this information is available across other channels.

Use Case Definition

Business Flow



Business Flow Description

1. A customer calls a service line of the company and progresses through the routing strategy. The routing strategy is not in scope of this use case.
2. An IVR application answers the call. The full IVR application is not within the scope of this use case, but the functionality in this use case can be used as a module to enhance the IVR application with personalization options.
3. If the customer needs to be identified and authenticated (verified), the ID&V interaction uses one or multiple identifiers (such as Customer ID, Account Number, or similar). Customer identification may also be verified by a PIN, if required. This functionality is offered by another use case provided by Genesys, which is leveraged in this scenario, Genesys Customer Authentication (CE07) for PureConnect. The identification and verification functionality itself is not within the scope of this use case.
4. Using the customer identifier (for example, ANI), Genesys can retrieve customer context information from a third-party system (optional).
5. The personalized treatment is decided based on submitting context to business rules natively, using third-party systems or using internal data. Personalized treatments include:
 - Playing a personalized message to the customer. The caller may hang up at this point if they have all the information they require. For example: The caller is identified to be in a region with a power outage. An announcement can be played to inform the caller of the status.
 - Proactively playing status or balance before presenting any options. For example: "Your next order is due to be

delivered on Thursday.”

- Proactively offering the most likely call reason. For example: “Are you calling about the loan application you have in progress?”
- Personalizing menu options (dynamic menu). For example: “Only play mortgage option in menu if they have a mortgage or present a promotion option if they are eligible.”
- Sending the customer to:
 - An agent with updated context
 - A self-service application (not in scope)
 - A generic menu if the caller does not fit any of the configured personalization options. In this case, the caller continues to the main menu of the IVR application. Since this use case is about personalization, the development of this main menu is out of scope.

Business and Distribution Logic

Business Logic

This use case is supported by industry templates that contain examples of personalized treatments using built-in variables or external variables. See below for an example list of these variables. Personalized treatments are confirmed during design.

Built-in Variables

Name	Description
Dialed Number	The number the caller dialed.
CLI	Calling Line Identifier - The number the caller is dialing from (also known as Automatic Number)
Recent Failure Flag	Indicates if a call has failed. When a call fails, for example due to technical error, a flag is set in True or False logic.
Random Percentage	Used for A/B testing. A specified percentage of calls can be randomly selected to be sent down monitored using the reporting.
Last Result	The outcome of the last call flow block. For example, for a menu this would be the menu choice successfully. This value is set by the speech application.
Number of Calls Today	The number of times the customer has called into this call flow today.
Number of Calls in Last Week	The number of times the customer has called into this call flow in the last week.

Number of Calls in Last 2 Weeks	The number of times the customer has called into this call flow in the lasttwo weeks.
Number of Calls in Last 4 Weeks	The number of times the customer has called into this call flow in the lastfour weeks.
Date	A specified date.
Time	A specified time of day.
Date and Time	A specified date and time of that particular day.
Current Day of the Week	This parameter allows you to select a day of the week. Further logic is required.
Opening Hours Rule	This parameter allows you to select whether an opening hours rule is currently open or closed.
Variable	Variables can be populated with context from within the same dialog or by integrating with oth

External Variables

In addition to the built in variables described above, additional customer variables can be used in the rules. These can be:

- Retrieved from a third-party system via a web service.
- Set by the IVR application that leverages this use case. This can be based on caller input, for example.

Business Rules

Business rules are applied to the variables to see how they compare to the configured value. The outcome of the business rule determines which personalized treatment applies. Business rules consist of logical comparisons of one variable with predefined values. Examples include:

- Variable *customer segment* is equal to VIP
- Current Date is equal to 24.12.2020
- Number of calls in the last week is greater than 3
- Multiple logical conditions can be combined within one business rule so that the treatment is applied only if all conditions are met. There is also the option to apply the treatment if any of the conditions are met. Examples for business rules:
 - If Customer Segment = VIP and Number of Calls Today > 1, then route directly to VIP agent
 - If Customer Segment = Platinum or Customer Segment = Gold, then play preferred customer announcement

The list below defines the possible options for comparison:

Name	Description
Equal to	Compare variable with a value to see if they are equal.
Not equal to	Compare variable with a value to see if they are not equal.
Containing	Compare variable with a value to see if the variable contains the value.

Not containing	Compare variable with a value to see if the variable doesn't contain the value.
Matching pattern	Compare variable with a value to see if the variable matches the pattern in the variable.
Not matching pattern	Compare variable with a value to see if the variable does not match the pattern in the variable.
Starting with	Compare variable with a value to see if the variable starts with the value.
Not starting with	Compare variable with a value to see if the variable doesn't start with the value.
Ending with	Compare variable with a value to see if the variable ends with the value.
Not ending with	Compare variable with a value to see if the variable ends with the value.
In list (comma separated)	Compare variable with a comma separated list to see if the variable is one of the values in the list.
Not in list (comma separated)	Compare variable with a comma separated list to see if the variable isn't one of the values in the list.
Between	Compare variable with two values to see if the variable is between those two values.
Not between	Compare variable with two values to see if the variable is between those two values.
Greater than	Compare variable with a value to see if the variable is greater than the value.
Greater than or equal to	Compare variable with a value to see if the variable is greater than or equal to the value.
Less than	Compare variable with a value to see if the variable is less than the value.
Less than or equal to	Compare variable with a value to see if the variable is less than or equal to the value.
Blank	Check to see if variable is blank.
Not blank	Check to see if variable is not blank.

Multiple Rules

Multiple rules can be added to the business logic for personalized routing so that many different personalized treatments can be handled within the same call flow.

Distribution Logic

N/A

User Interface & Reporting

Agent UI

N/A

Reporting

Real-time Reporting

Supervisors have the ability to view interactions in the IVR and see which stage the call is in.

Historical Reporting

The Genesys solution provides reports to determine:

1. Whether customers were presented with contextual options.
2. Whether dynamic menus were presented and if so, whether customers select a self-service option or are transferred to an agent (deflection rates).
3. How long customers spent in the IVR.

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
Inbound <ul style="list-style-type: none">• Genesys Personalized Routing (CE02)	None	Self-Service and Automation <ul style="list-style-type: none">• Genesys Customer Authentication (CE07)	None

General Assumptions

- External variables require customer integration into a third-party system. We assume that this data can be accessed using a web service.

Document Version

- Version **v 1.0.1** last updated **March 27, 2025**

Genesys Outbound Dialer (CE11) for PureConnect

Improve customer communications and increase sales conversion using powerful dialer capabilities

What's the challenge?

Dialing for sales outreach is a hard job that requires specialized skills. Low agent utilization due to sub-par dialers, manual dialing, lack of appropriate blending of inbound/outbound result in fewer sales conversions.

What's the solution?

Deliver coordinated outreach and create optimal engagements based on agent availability while reducing costs. Improve the ROI of outbound sales campaigns by efficiently acquiring, up-selling, and winning back customers through automated and assisted calling campaigns by using a powerful dialer for voice calls and IVR for voice messaging.

Other offerings:

Genesys Cloud Genesys Engage on-premises

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Use Case Overview

Story and Business Context

A company needs to make outbound calls to initiate contact with its customers based on specific business rules for sales, marketing, care, or collections. This use case describes the ability to configure and execute outbound dialing campaigns – both automated and agent-assisted – based on customer-provided contact list(s).

Generating new business and up-selling existing customers is a critical part of any business. Sales and marketing organizations are challenged with improving the efficiency of their team members; increasing reach, contact rates, response rates, and revenue; and complying with industry regulations.

Happier Agents

- Predictive dialing is used when appropriate to improve agent efficiency and satisfaction by removing low value calls and wasted time
- Productive and highly utilized agents will have more opportunities to serve customers, close business, and meet their sales quotas

Happier Legal Team

- Compliance and business rules are accurately maintained to ensure enterprise-wide contact strategy adherence

Improved Effectiveness / Higher Return on Investment

- Improved return on investment of outbound sales and marketing campaigns (e.g. telemarketing; upsell/cross-sell; customer win-back; loyalty/promotions) and outbound campaigns.
- Leads are routed to sales agents within seconds (not minutes, hours, or days) since "speed to lead" follow-up is crucial in many sales environments. This drives lead contact rates and conversion rates, while decreasing call abandonment rates.
- Sales departments are using predictive, progressive, and/or preview dialing modes instead of making manual dials. Outbound call volume is efficiently paced, which results in more sales conversations and increases agent productivity.

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 Conversion Rates	Conversion rates, cross-sells and up-sell rates will improve through the ability to automatically generate outbound calls and empowering agents with single searchable desktop application that

Use Case Benefits	Explanation
	shows customer context.
Improved Employee Utilization	Automating dialing eliminates time spent on dialing and on unanswered calls to improve employee utilization. Enabling blending of inbound and outbound calls also improves employee utilization.
Increased Contact Rate	Automated handling of voicemail and unanswered calls improves right party contacts.
Reduced Customer Churn	Improved customer experience, and in consequence, a reduction in customer churn allows organizations to save on the costs associated with acquiring new customers plus avoids the loss of future revenue.
Reduced Volume of Interactions	Reduced volume of interactions by proactively sending communications through outbound channels.

Summary

The Genesys system supports both agent-assisted and automated outbound calling campaigns using dialer and outbound IVR channels. Companies can blend contact strategies and escalate outreach attempts from automated to agent-assisted calls. Dialer calls can be made in predictive, progressive, preview, or manual mode. The company can use its marketing, CRM, or collections system to generate contact lists based on a one-time event, recurring events, or trigger-based events. The lists include the appropriate contact details, such as contact name, contact phone number, and contact reason. Delivery results are recorded in the system to feed into reports.

Sales and lead development reps are manually dialing customers and prospects for sales and marketing purposes, which is expensive and wastes time. Companies are managing communication in silos and don't have an integrated, outbound dialing campaign. All companies must follow industry regulations and manage for compliance risk.

Use Case Definition

Business Flow

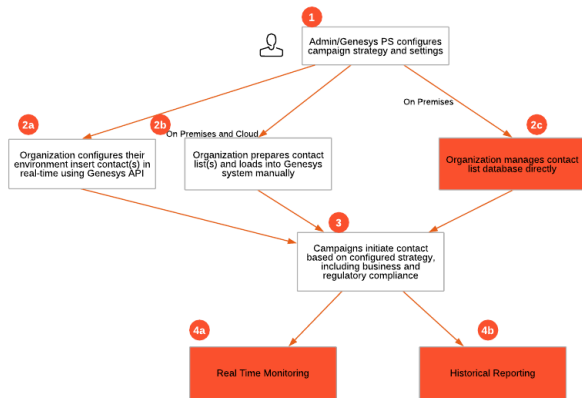
(1)

The following diagram shows the main flow of the use case:

Business Flow

(2)

The following diagram shows the Agentless calling mode flow:



Business Flow Description

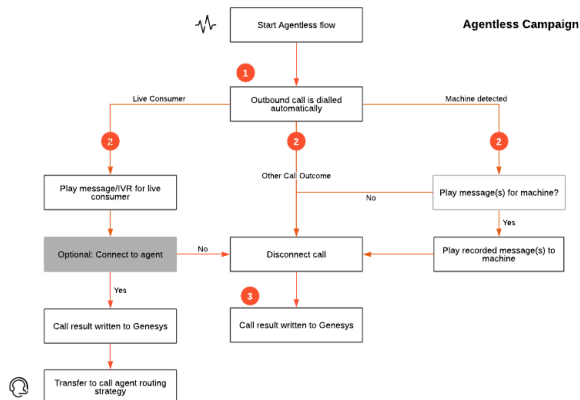
1. An admin or Genesys Professional Services configures the campaign strategy and settings in the Genesys system.
2. The organization either prepares a contact list from a third-party system (such as CRM or collections) or configures their system to use a Genesys PureConnect API to insert contact records. The organization defines the schema for each list.
3. The campaign begins contacting consumers based on the campaign strategy set in step 1. The Genesys system checks each contact/record against the configured Do Not Call list to filter out consumers who should not be contacted. Each call result is recorded. See *Cloud or On Premises* and *On Premises Only* options below.
4. The organization uses the real-time monitoring tools or historical reports to evaluate campaign success.

Cloud or On Premises Options from item# 3

- Manual upload of file with Contact List Import Wizard
- Use API to insert records in real-time or batches

On Premises Only

- Organization manages the contact list database directly, inserting records using SQL (Oracle or MSSQL)



Business Flow Description For Agentless campaigns, there are multiple resulting scenarios:

1. An outbound call is dialed automatically.
2. Call Analysis Detection determines which path to take:

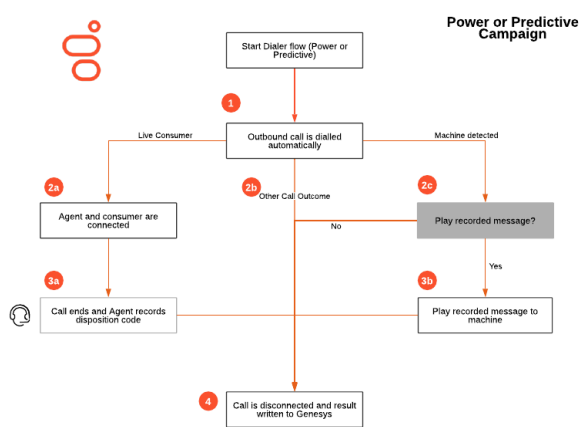
- Live Party - the call either disconnects, plays a recorded message, or uses IVR tools to create a call flow to produce a tailored message, which may include:
 - Text-to-speech playback of contact data from list
 - Decision trees based on contact data to personalize the message
 - The option to opt out of future calls. This is typically done by including “Press 9 to opt out of future calls”
 - The option to connect to a live agent
 - Speech analysis to interpret consumer words instead of using touch-tone buttons, as available
 - Any other IVR-related feature, such as transferring to self-service
- Answering Machine - the call either disconnects, plays a recorded message, or uses IVR tools to create a call flow to produce a tailored message, which may include:
 - Text-to-speech playback of contact data from list
 - Decision trees based on contact data to personalize the message
- Other call results, such as No Answer or Bad Number, disconnects the call

3. In each case, the call is disconnected and the result is written back to the system.

Business Flow

(3)

The following diagram shows the Power and Predictive calling mode flow:



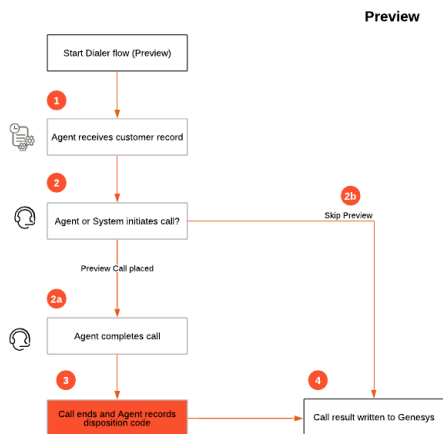
Business Flow Description

1. In Power mode, the system automatically places some number of calls based on the pacing algorithm and when the agent becomes available for the specific campaign. In Predictive mode, the system automatically places some number of calls based on the pacing algorithm and expected agent availability for the specific campaign.
2. For each call attempt, the following are the Outbound Scenarios:
 - Live Party connect - the agent is connected to the contact.
 - Other Call Outbound, that is, Bad Number or No Answer: the call disconnects and the result is written back to the system.
 - Answering Machine: the call either disconnects or plays a message (based on the chosen configuration in step 1)
3. At the end of the call, the agent selects a result code, or the system automatically assigns a result code if not handled by an agent. The following are some of the optional agent dispositions that may be configurable:
 - The contact has the option to ask for a callback. The agent selects a date and time for the campaign to place another call to that contact.
 - The contact may choose to opt out of future calls. That contact is added to a Do Not Call list for future scrubbing for this campaign.
4. The call is disconnected. The result is written back to the system.

Business Flow

(4)

The following diagram shows the Preview calling mode flow:



Business Flow Description

1. In Preview mode, the agent receives a record prior to the call being placed.
2. Based on configuration, either that agent initiates the call or the campaign places the call after a configurable number of seconds. There is also a separate, configurable Skip result if the agent does not place the call.
3. The agent determines the result from a provided list, whether No Answer, Bad Number, Answering Machine, or any number of live party potential outcomes.
4. The selected result is written back to the system.

Business and Distribution Logic

Business Logic

Contact Records

Contact records are either manually uploaded (Cloud and On Premises), added on-demand via API (Cloud and On Premises), or by managing a the Dialer contact database directly (On Premises only). This would be configured by the organization admin or Genesys Professional Services, based on the goals of the customer and the source of the contact. There is no limit on the number of contacts.

Campaign Settings

The organization admin or Genesys Professional Services can configure various campaign settings: start/stop timing, frequency of contact per consumer, filtering treatments, answering machine detection, opt out options, connect to agent options, agent desktop display (scripting), sorting of contacts, and assigned agent group.

Calling Mode - Predictive, Power, Preview

The organization can choose to run Dialer campaigns using Agentless, Preview, Power, and/ or Predictive modes. This mode is configured by the organization admin or Genesys Professional Services.

Scripting Settings

The organization configures scripts for agents using provided script building tools. Scripts have dispositions, text that contains verbiage for agents to read to live party or instructions, and data from the contact list displayed with labels, or embedded within the text area ("Hello *John Customer*, this is *Sally Agent* calling about *Our Product*").

Answering Machine Detection

The organization can choose whether to disconnect or to play a message when an answering machine is detected. Machine detection may be completely disabled, in which case machines are treated as live party connects.

Personalization

For Agentless campaigns, the content and flow of the message may use personalized information from the contact list database to determine which messages to play, and perhaps text-to-speech playback. The audio files are provided by the organization.

User Interface & Reporting

Agent UI

- The agent must be able to view data about the contact provided in the list of contacts assigned to a campaign.
- The agent must be able to read instructions or verbiage displayed on their screen specific to the campaign call.
- The agent must be able to enter a wrap code for each call. The code is used to define the next step in the recall strategy and is captured for historical and real-time reporting.
- Each of the above items must be configurable by an Administrator.

Reporting

Real-time Reporting

Interaction Center Business Manager

For PureConnect, Interaction Center Business Manager contains the real-time reporting features for outbound capabilities. The views are documented in [PureConnect help](#).

The outbound views show statistics regarding campaign performance, agent performance, campaign status and activity, and outbound system health.

Historical Reporting

Outbound historical performance reports are documented in the [PureConnect help](#).

The reports are accessible via the Interaction Reporter view of IC Business Manager. The reports provide information about campaign and agent performance over a provided time range.

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	Inbound <ul style="list-style-type: none">Genesys Call Routing (CE01)Genesys Personalized Routing (CE02)	None	None

General Assumptions

- A customization is required to correlate an inbound interaction resulting from an outbound campaign. This includes updating the contact's status or adding them to a Do Not Call (DNC) list.
- Customer provides an MSSQL or Oracle database for use by Interaction Dialer.
- Automating the import of contacts to the database will be defined as provided by Genesys PS, via customer-developed usage of contact list API, or customer direct updates to the provided database.

Customer Responsibilities

NA

Document Version

- Version **ver 1.0.3** last updated **March 27, 2025**

Genesys Email Routing (CE16) for PureConnect

Route email interactions to the best skilled resource

What's the challenge?

When customers take the time to send an email, they expect a quick, personalized response. But as the volume of email interactions increases, you struggle to provide timely and helpful responses. Trust in email as a reliable communication channel is declining among your customers and employees.

What's the solution?

Automatically distribute emails to the best-fit agent based on content analysis and keywords. Genesys Email Routing streamlines your response process using email automation functionality that enables you to monitor, measure, and optimize your email flow to create a better customer experience.

Other offerings:

Genesys Cloud Genesys Engage on-premises

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Use Case Overview

Story and Business Context

Email is still one of the most reliable and desired ways for customers to interact with companies for support. It is an essential avenue for companies to serve and engage with customers while providing a consistent and positive customer experience. Genesys can improve handle time, first contact resolution, agent utilization, and customer satisfaction by automatically distributing emails to the best available agent based on content analysis and keywords, and automating acknowledgements and responses.

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	Addressing customers requests in a timely manner through skills based routing improves Net Promoter Score
Improved Employee Utilization	Blending email with voice and chat allows agents to make better use of downtime between calls and chats to improve employee occupancy.
Improved First Contact Resolution	Directing interactions to an expert through skills based routing improves First Contact Resolution
Reduced Handle Time	Reduce handle time by routing emails to agents with the right skills

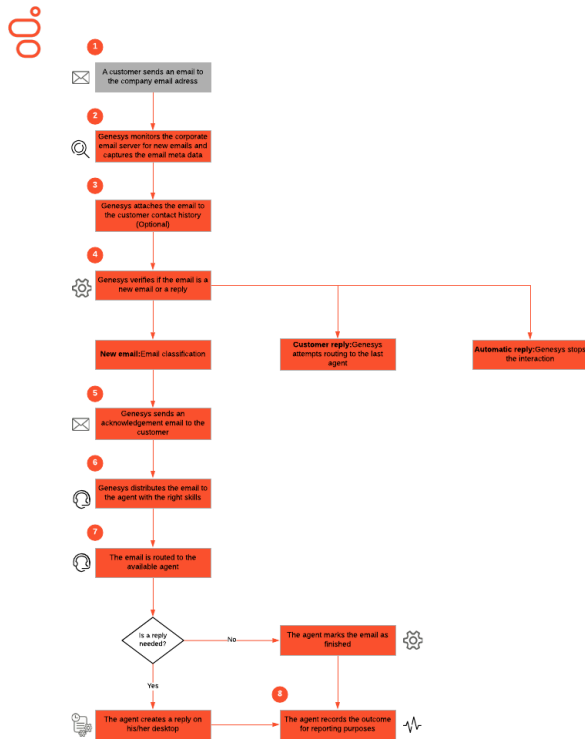
Summary

A customer sends an email to a company email address. The email is captured by the Genesys system and a content analysis is performed. It is then queued to the best available agent with the corresponding skill set. Priority tuning functionality can improve the service level adherence to customer's emails. The reporting functionality of this use case provides management visibility into the email interaction channel to drive further improvements.

Use Case Definition

Business Flow

The following diagrams show the business flow of the use case:



Business Flow Description The following flow describes the use case from the perspective of the main actors, i.e., the user and contact center agent.

1. A customer sends an email to one of the public addresses (e.g., orders@abc.org) monitored by the Genesys email solution.
2. Genesys periodically checks corporate inboxes for new emails. Genesys analyzes the email to capture From, To, Subject, and body content as metadata.
3. Conversation tracking option: Genesys verifies whether the corresponding user already exists as a contact within the Tracker system (by email address). Tracker is an additional, licensable product. The email and any agent responses are attached to the contact.
4. The system checks whether the email is new or a reply.
 1. In case of a new email, the system classifies the email based on keyword analysis (see the Keyword Categorization section).
 2. In case of a reply email from the customer, the system attempts to route it to the previous workgroup (see details in the Distribution Logic section). After a timeout, the system routes the email to the originally specified workgroup.
 3. In case of an automatically generated reply email, the email will not be distributed to an agent and the flow will stop.
5. The system sends out a receipt acknowledgement email to the customer with a predefined template for the To address.
6. Once an agent with the requested skill is available, the email is routed to the agent's

desktop with a screen pop from the email editor displaying the content.

7. Once the agent reads the email, he or she decides whether a reply is needed.
 1. If no reply is needed, the agent marks the email as done.
 2. If a reply is needed, the agent creates an outbound reply email, potentially using a standard response template.
8. The agent sets a disposition code to mark the business outcome for reporting purposes.

Business and Distribution Logic

Business Logic

In the logical flows in the previous sections, there are a number of process steps driven by configuration parameters and additional business logic within the system. These parameters and the underlying logic are described in this section.

Capturing of Incoming Emails

In step 2 of the business flow, the Genesys system checks a set of mailboxes for new emails. The following configuration options are available:

- Address of email server for mailbox
- Authentication details for mailbox
- Protocol for communication (POP3, IMAP, Exchange Web Services protocol)
- Delete email (any emails captured by Genesys are deleted from the mailbox)
- Polling frequency (how often the mailbox is checked for new emails)

Automatic Replies

In step 4, the Genesys system checks for automatic/system replies from the mail server to automatically stop email processing when no agent intervention is needed. This includes:

- Detection of automated answers to prevent “ping-pong” between mail servers by answering with auto-acknowledge on emails of type auto-response or auto acknowledgement.
- NDR Handling (Non-Delivery Report Handling): The system recognizes automatic responses due to failed delivery (assuming these automatic responses are following standards).

Keyword Categorization

Keyword matching allows the system administrator to configure a number of screening rules to identify emails belonging to different categories. For example, an email that contains the word “order” in the body of the email, would be categorized as a sales email. Screening rules can be configured to look for different words or phrase patterns that help categorize emails. Screening rules are applied to the email body and subject.

Standard Responses

In the response library window, the workspace displays suggested responses to the agent based on keyword searches. Standard responses are generated by the customer for specific scenarios of desired email responses. Standard system-wide responses created in Interaction Administrator are detailed in Add a Response Management Library. The standard responses can be used in Interaction Connect or Interaction Desktop

Using response management in an email is described here for Interaction Connect users and Interaction Desktop users.

Distribution Logic

Available Parameters for Configuration by Customer

The following parameters are used for the distribution logic. These parameters are configurable by category:

- Overflow time-outs for overflowing from last workgroup routing to originally defined workgroup target. These timeouts are based on age of interaction.
- Priority start (the starting priority)
- Enable / disable last agent routing.

The following parameter is configurable by the “To” address:

- Auto-acknowledge message

Draft Emails and Agent Queue Alerts

If the agent cannot complete an email, it remains as an open interaction in the agent's queue. Supervisors can set up an alert within IC Business Manager to notify them when queue items have remained beyond a specified threshold.

Additional Distribution Functionality

The following lists additional functionality for the distribution logic:

- Re-route on no answer (RONA) functionality: If an agent does not accept the email interaction, the email interaction is automatically put back into the distribution flow after a time-out. The agent is set to not ready. The priority of the email can be increased by a configurable parameter.
- Blending email interactions with other media types is possible.
- Transfers are possible to agents satisfying the skills of a different category. In the case of a transfer, the

priority is increased to a level set in a configurable parameter.

User Interface & Reporting

Agent UI

The following lists the minimum requirements for the agent desktop:

- Configuration of status messages (Available, Away, Meeting, etc.).
- Configuration of wrap-up codes (Codes are configurable to customer's preference)
- Access to a standard response library where customers can build their own messages for specific email responses
- Agent to Agent transfer
- Agent to Queue transfer
- Review functionality for supervisors

Reporting

Real-time Reporting

Premises and Cloud

IC Business Manager is a Genesys 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, email interactions handled, and the average handle time. With IC Business Manager, a customer can:

- Monitor the current state and activity of contact center objects to help make decisions about staffing, scheduling, and email routing strategies.
- Create widgets from scratch or user-defined templates for a fast and easy text or graphical presentation of selected or user-defined object statistics.
- Monitor operational email activity through the Email Queue Activity views.
- Monitor agent resource activity through the Email Agent Activity views
- Monitor the tenant service level through the Email Service Level views.

Historical Reporting

Premises and Cloud

IC Business Manager out-of-the-box reports are used to:

- Assess the day-to-day operations of the contact center resources for the routing and handling of interactions.

- Measure the effectiveness of the routing rules and efficiency of the use case.
- Calculate the conversion success rate using disposition/wrap-up codes.
- Evaluate resource performance with a variety of reports for agents and interaction details. There are many reports available, including the following.

Queue Service Level - The Queue Service Level report provides the ability to see the summary and details of up to 12 configured service levels in an absolute or cumulative view with a percentage option for the relevant media type.

Queue Summary and Detail -The Queue Summary and Detail report displays summarized statistical data along with detailed statistics on Workgroup Queues. The statistics are reported, grouped, and summarized by any combination of Queue, MediaType, Interval, Skill or DNIS. Data for calls Answered or Abandons is summarized and displayed when a single service level configuration is present in the data selected, but is otherwise suppressed. The report also displays a chart for Interactions Distributions and Service Level.

Agent Utilization Report - The Agent Utilization report displays time usage information by agent across all campaigns, including: talk, ACW, non-Dialer, idle, break, preview.

For more information, see [About Interaction Reporter](#).

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

- Interaction Center Business Manager is required for historical reporting.
- Interaction Desktop or Interaction Connect is used as the agent desktop.
- Customer must ensure proper network connectivity between the PureConnect server and their mail platform, either through a private MPLS connection and the customer's network or via the public internet.

Customer Responsibilities

- Genesys captures emails typically from one primary corporate email server. The customer is responsible for configuring the email server appropriately so that Genesys can retrieve the requested emails.

- For customers who want to retain an archive of original messages, two approaches are available. Customers can configure their server to create and separately store a duplicate copy of all emails. Or, Professional Services can be engaged to create a handler to accomplish the task. Processing emails from the corporate server to Genesys software results in emails being deleted from the original customer server folder.
- Genesys provides documentation about the required connector configurations and the sequence of email handling between servers as part of the described email functionality. The Genesys documentation references third-party documentation about processing limits for particular kinds of email connectors and queues. Genesys does not support customer configurations or a desire for higher performance beyond the published guidelines and limits.
- Email is handled through POP3, IMAP, Exchange Web Services, or Gmail Connector protocols according to those tools' published documentation.
- Customers are responsible for creating their own automated responses within Interaction Administrator.
- Spam is handled at the level of the customer's corporate email servers. A third-party spam solution is required.

Document Version

- Version **v 1.0.3** last updated **March 27, 2025**

Genesys Chat Routing (CE18) for PureConnect

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 Genesys Engage on-premises

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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	Make better use of employee skills by routing chats to the right resource through skills-based routing
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

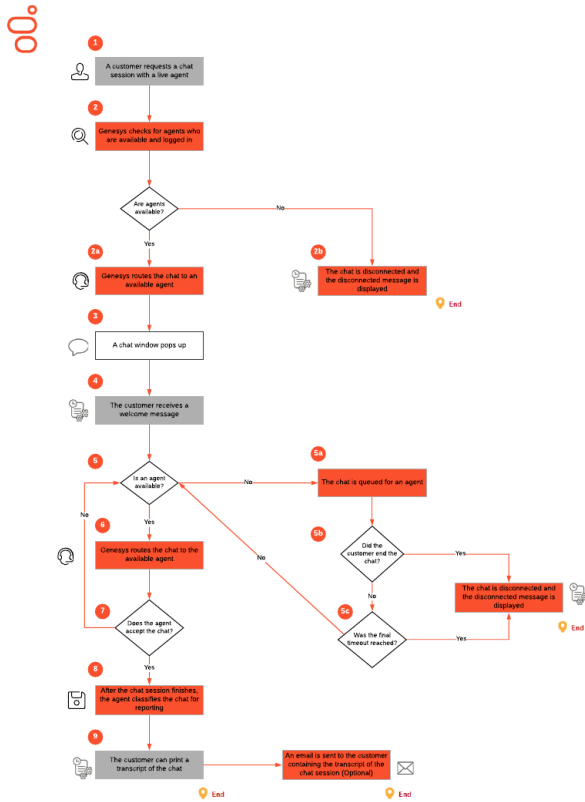
Summary

A website visitor can request a chat session with an agent from the company's website 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 visitor's 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 center agent. The following diagrams shows the business flow of the use case:



Business Flow Description

- The website visitor requests to chat with a live agent via the webpage.
- Genesys checks if agents are available, logged in, and (through the use of Genesys APIs) is able check the wait time to make intelligent decisions as to when to offer the chat feature to website visitors.
 - If no agents are logged in, the chat is disconnected and the website visitor receives a disconnect message.
 - If agents are logged in, routing takes place.
- The chat pop-up window opens.
- The website visitor gets a welcome message from the Genesys system. Welcome text varies, depending on the workgroup.
- The Genesys system searches for an available chat agent.
 - If no agent is available, the chat interaction is queued (see section “Distribution Logic,” for the queuing logic) until an agent becomes available. Wait time and the option to leave a chat voicemail can be configured to send to the website visitor during wait time.
 - If the website visitor ends the chat session, the business flow ends.
 - If the final timeout is reached, the chat is ended and the website visitor is informed. The business flow ends.
- When the chat request is routed to an agent, the agent can either accept or ignore the chat interaction. If the agent does not accept the chat interaction, Genesys attempts to route the interaction to another agent after a specified timeout. The first agent is set to not ready (Did Not Answer).
- If the agent accepts the chat interaction, the chat session between the agent and the website visitor is established. The agent sees the full chat session and context within the desktop. The agent can use standard responses based on the workgroup for the chat interaction.

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 that can be configured based on the subject:

Parameter	Description
Skill	<p>Required agent skill for distribution of the chat message</p> <ul style="list-style-type: none"> Required minimal skill level for the first target group of Min Skill level 1 agents Required maximum skill level for the first target group of Max Skill level 1 agents
Idle time warning (for customer)	Idle time warning that the interaction will be disconnected after the website visitor has not communicated for a specified period of time.
Idle time disconnect Message (final time out)	This message is displayed to the website visitor when the idle time limit has been reached.
Disconnect Message (no agents)	This message is displayed to the website visitor when no agents are logged in for this service.
Welcome message	This message is displayed to the website visitor when the chat session is started.
Wait Time	This message is displayed when a website visitor first connects.
Position in Queue	This message is displayed when a website visitor first connects.
Option to Leave a Chat Voicemail	This message is displayed when a website visitor first connects.
Chat Transcript	Available as an option to print from the chat window.

- When the chat session is finished, the agent can set a disposition code to register the outcome of the chat for reporting purposes.
- The website visitor has the ability to print a transcript of the chat session. Additionally, with the optional Interaction Recorder license, visitors can receive an email with a transcript of the chat session.

Standard Responses

In the response library window, the workspace displays suggested responses to the agent based on keyword searches. Standard responses are generated by the customer for specific scenarios or steps of the chat flow.

Operational Hours

Operational hours should be configured on the customer's webpage. The chat initiation functionality should not be displayed to website visitors outside of business hours.

Additional Functionality

The following list includes additional functionality for the distribution logic:

- The distribution logic looks for agents with the requested skill and a skill level within the boundaries of minimum and maximum required skill levels.
- The skill, minimum and maximum skill levels, and timers will be configurable by subject (see section "Business Logic").
- Re-route on no answer functionality: If an agent does not accept the chat interaction, the chat interaction is automatically put back into the distribution flow after a timeout. The agent is set to Agent Not Answering.
- Blending with other media types is possible. Priority settings for chat interactions is configurable to enable proper priority ranges between different media types. Utilization rules are configured for the agents or agent groups to define which interactions can be handled in parallel (if any).

User Interface & Reporting

Agent UI

The following list includes the minimum requirements for the chat interface:

- Configuration of not-ready reason codes (Agent Not Answering, Away From Desk, Meeting, etc.)
- Configuration of disposition codes to report on business outcome (Cross Sell, Need Follow-Up, Not Right Skill, Processed, Terminated, Transferred, Up Sell)
- Access to a standard response library where customers can build their own specific response messages for specific steps of the chat flow
- Agent to agent transfer

Reporting

Real-time Reporting

Premises and Cloud

IC Business Manager is a Genesys 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 IC Business Manager you can:

- Monitor the current state and activity of contact center objects to help make decisions about staffing, scheduling, and chat routing strategies.
- Create widgets from scratch or user-defined templates for a fast and easy text or graphical presentation of selected or user-defined object statistics.
- Monitor operational chat activity through the Chat Queue Activity views.
- Monitor agent resource activity through the Chat Agent Activity views.
- Monitor tenant service level through the Chat Service Level views.

Historical Reporting

Premises and Cloud

IC Business Manager out-of-the-box reports are used to:

- Assess the day-to-day operations of the contact center resources for the routing and handling of interactions
- Measure the effectiveness of the routing rules and efficiency of the use case
- Calculate the conversion success rate, with Disposition/Wrap-Up codes
- Evaluate resource performance with a variety of reports for Agents and Interaction Details

Queue Service Level - The Queue Service Level report provides the ability to see the summary and details of up to 12 configured service levels in an absolute or cumulative view with a percentage option for the relevant media type.

Queue Summary and Detail -The Queue Summary and Detail report displays summarized statistical data along with detailed statistics on Workgroup Queues. The statistics are reported, grouped, and summarized by any combination of Queue, MediaType, Interval, Skill or DNIS. Data for calls Answered or Abandons is summarized and displayed when a single service level configuration is present in the data selected, but is otherwise suppressed. The report also displays a chart for Interactions Distributions and Service Level.

Agent Utilization Report - The Agent Utilization report displays time usage information by agent across all campaigns, including: talk, ACW, non-Dialer, idle, break, preview.

For more information, see [About Interaction Reporter](#).

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

- Historical reporting requires IC Business Manager.
- Interaction Desktop or Interaction Connect is used as agent desktop.
- There is no integration with third-party systems.
- If customers require advanced chat window customization, they must deploy Web Chat Server on a premises system. Basic customizations are available in the Genesys hosted chat solution.

Customer Responsibilities

- The Genesys customer handles the integration of the solution into the website.
- Customers are responsible for creating their own automated responses within Interaction Administrator.
- Checking for Agents Logged In/Availability on every subsite of a website is not recommended as excessive requests can strain the CIC server. It is recommended to cache this information and check on intervals, or to only check on the leaf/end page of a tree.

Document Version

- Version **v 1.0.2** last updated **March 27, 2025**

Genesys Social Media Routing (CE19) for PureConnect

Engage with your customers through social channels

What's the challenge?

As the volume of social network interactions continues to escalate, it's clear that simply throwing more people onto Twitter and Facebook is not a sustainable solution — there needs to be a new evolution to a scalable model for managing social engagement.

What's the solution?

Monitor your business presence on relevant social media sites and easily identify and prioritize online comments. Automatically routing social media interactions across the enterprise to the right people brings new levels of scalability, consistency and responsiveness in your social media interaction strategies.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

Social media features in PureConnect allow agents to receive and reply to inbound, ACD-routed Facebook and Twitter messages, as well as Facebook private messages and Twitter direct messages. PureConnect routes social media interactions to workgroups that are associated with Facebook and Twitter channels.

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 consistent CX across social networks by providing agents customer info and social context.
Improved Employee Utilization	Deliver interactions to the best available resource with escalation to other channels when needed.
Improved First Contact Resolution	Improved First Contact Resolution by routing interactions to an expert through skill-based routing.
Increased Revenue	Increase revenue and reduce customer churn with improved resolution of business outcome.
Reduced Administration Costs	Eliminated manual monitoring/reporting by automating efforts through Genesys Social Engagement.

Summary

Consistently provide customer service across Twitter and Facebook by delivering interactions to the best available resource with social media public and private messaging. Agents are able to advise customers based on customer information and social media context. Standard responses enable your agents to provide consistent response to customers engaging via Facebook or Twitter.

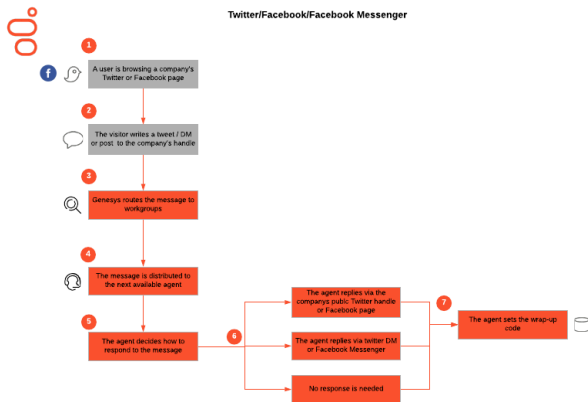
Use Case Definition

Business Flow

Business Flow - Twitter, Facebook and Facebook Messenger

The following flows describe the use case from the perspective of the main actors, i.e., social media user and contact center agent.

The first flow shows how a social media message is handled:



Business Flow Description

1. The user searches in Twitter/Facebook for the company's handles.
2. User reports a customer care issue via a Tweet, Twitter DM, Facebook Post, or Facebook Messenger message to the attention of the company.
3. Genesys monitors the Twitter/Facebook handles via predefined events and filters the message using keywords to determine actionability (routing to workgroups).
4. Genesys searches for an available agent within the configured workgroup.
 1. If an agent is available, the interaction is routed to an agent.
 2. If no agent is available, the interaction is queued until an agent becomes available.
5. The interaction is sent to the next available agent for appropriate response.
6. The agent will decide if the interaction requires private comments.
 - If no private answer is required, the agent will reply via the company Facebook page or company's Twitter handle.
 - If private messaging is required, the interaction will be moved out of the public comment space and will be dealt with via private messaging (Twitter direct message or Facebook Messenger private message).
 - Best practice for the agent is to respond to a public message with a public response, indicating that the conversation might be moved to private.
7. When the interaction is finished, the agent can set a wrap-up code to register the outcome for reporting purposes.

Business and Distribution Logic

Business Logic

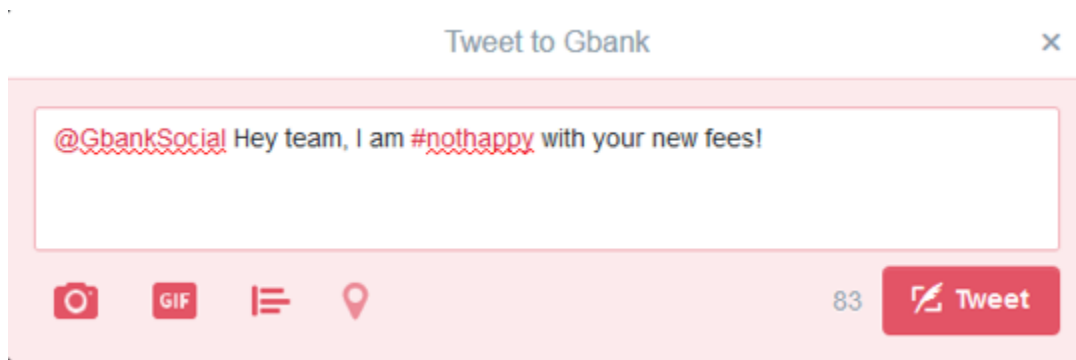
This chapter describes the business logic and business rules, which drive the decisions made by PureConnect social media features within the business flow above.

Engagement Scenarios

The following scenarios describe typical social customer care engagement which have been used successfully.

Scenario 1: Twitter - Tweet to company

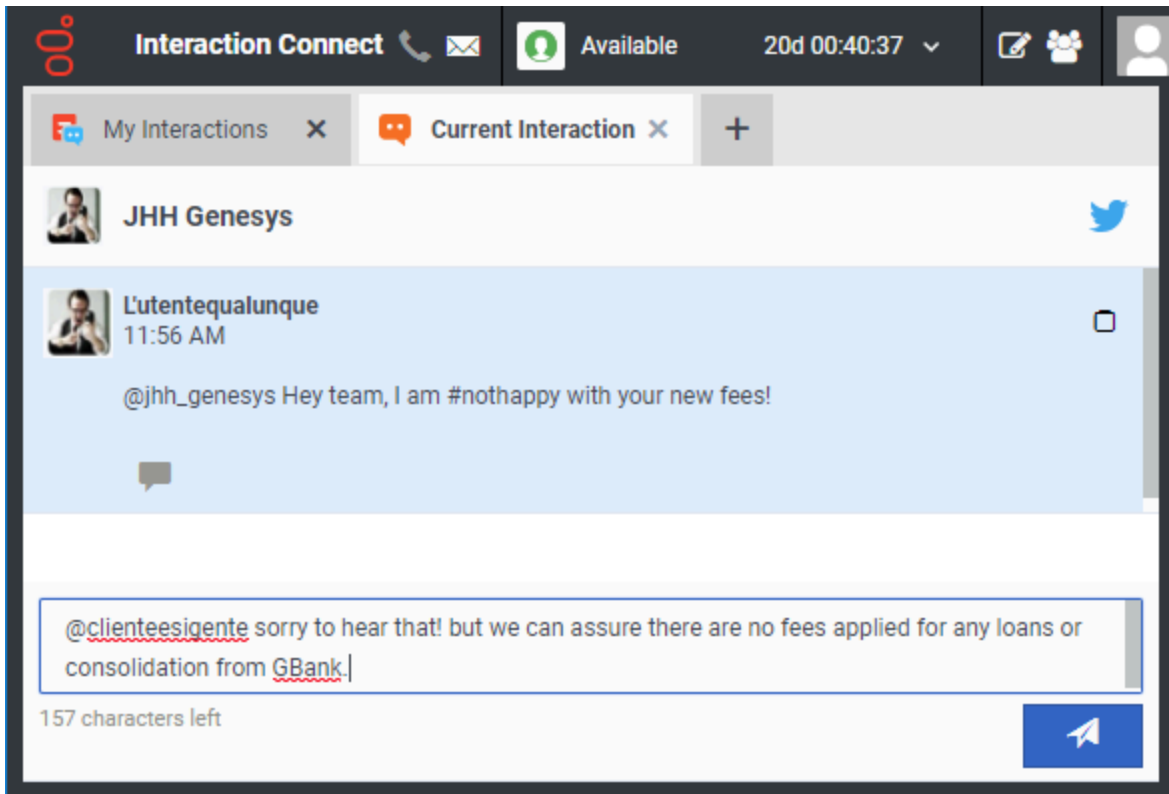
This scenario depicts an engagement when the social media user sends a Tweet to the company's Twitter handle using their account.



PureConnect captures this message according to the predefined Twitter channel configuration and routes it to the next available agent in the configured workgroup.

The incoming Twitter interaction is routed to the next available agent in Interaction Connect.

The incoming Twitter interaction is delivered to the agent desktop. The agent reads the incoming Twitter message and can then send a public Twitter response. In order to consider the interaction complete, the agent disconnects the interaction. Upon disconnection, the agent may be given the opportunity to assign a wrap-up code to the interaction.



If the agent responds, PureConnect sends the response back to the social media user as a Twitter reply.



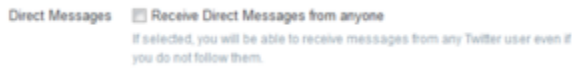
Scenario 2: Twitter - Direct Message (DM) to company

In this scenario, a social media user sends a Twitter direct message to a company's Twitter handle. This is only possible when one of the following conditions is satisfied:

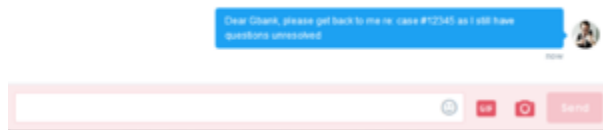
- The flag “Receive Direct Messages from anyone” is activated in Twitter (not recommended as this might result in a high volume of messages).
- The company follows the social media user.

- A Twitter direct message conversation was previously established.

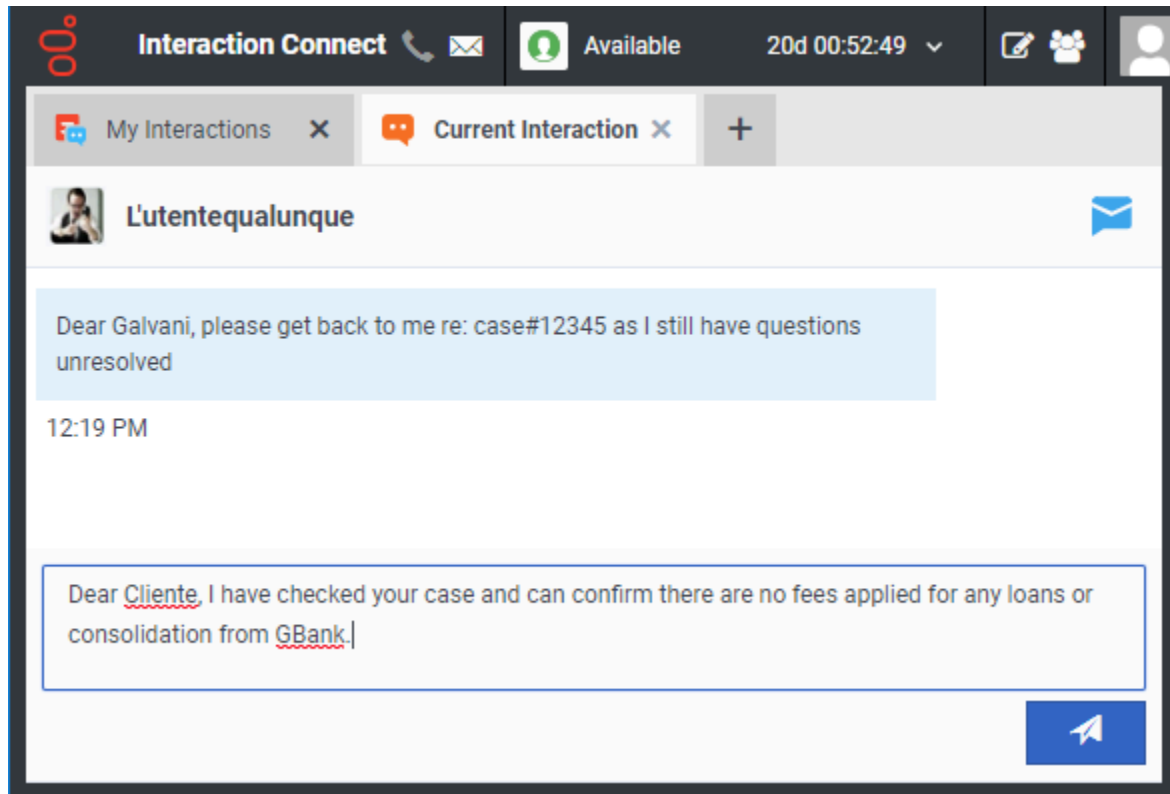
Note that the Twitter policies that allow sending unsolicited direct messages may change. This is outside of Genesys control and the flow and/or preconditions to send direct messages may change.



Customer sends a Twitter direct message to the company:



It is a typical use case for a social media user to first publicly Tweet at the company before initiating a direct message conversation. The company can publicly respond, asking the social media user to first follow the company if necessary, and then asking the customer to send a direct message to the company to carry on the conversation in private.

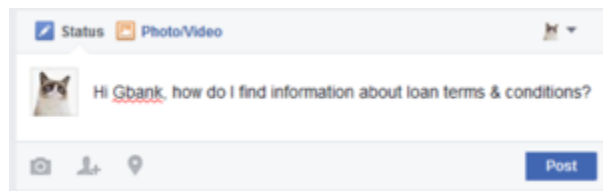


If the social media user then sends a direct message to the company, the interaction is routed to the configured workgroup and assigned to the next available agent. The agent can then respond to the user to continue helping them in private. Once the interaction is complete, the agent can disconnect the interaction and may have an opportunity to assign a wrap-up code at that time.



Scenario 3: Facebook - post on company's timeline (wall) or comment to post (Reply)

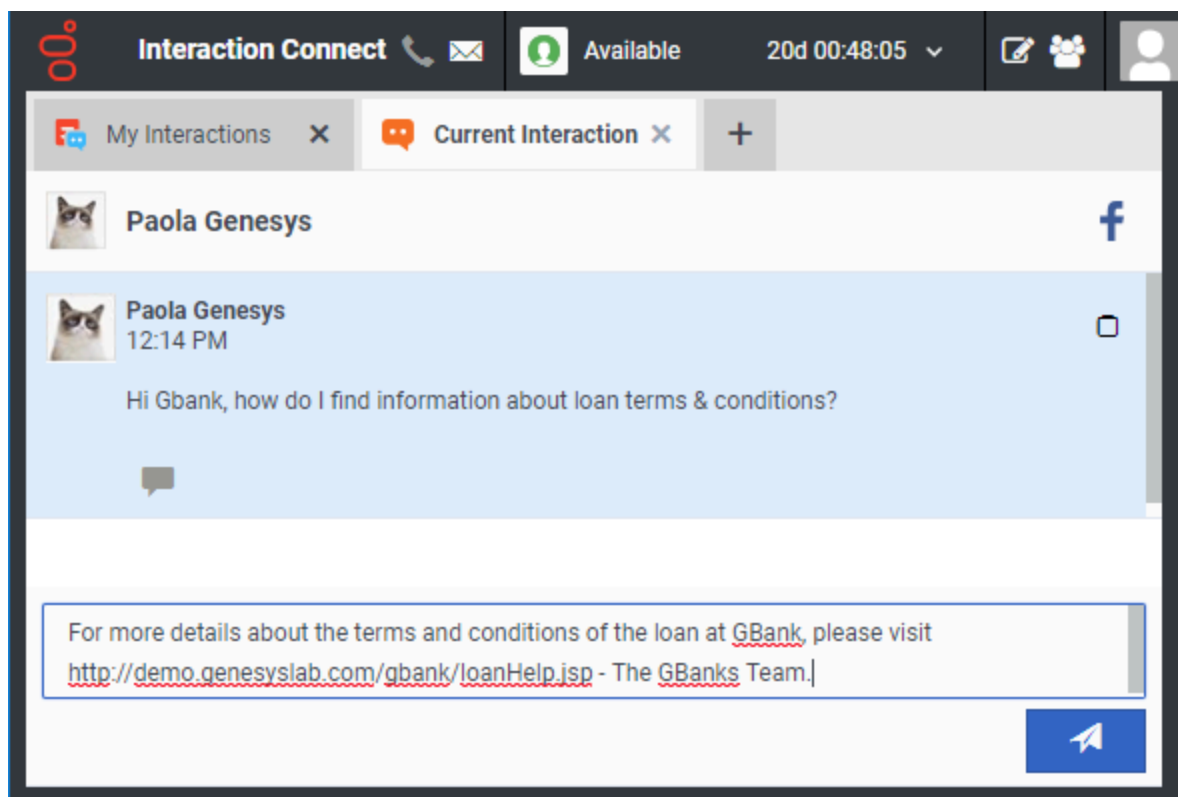
A social media user uses their account to post a message on the company's Facebook page or replies to a post the company made on its Facebook page.



PureConnect captures this Facebook post or reply according to the predefined Facebook Channel configuration, and routes it to the next available agent in the configured workgroup.

The incoming Facebook interaction is routed to the next available agent within Interaction Connect.

The incoming Facebook interaction is delivered to the agent desktop. The agent reads the incoming Facebook post or reply and can then send a public Facebook reply. In order to consider the interaction complete, the agent disconnects the interaction. Upon disconnection, the agent may be given the opportunity to assign a wrap-up code to the interaction.



If the agent responds, PureConnect sends the response back to the social media user as a Facebook reply.

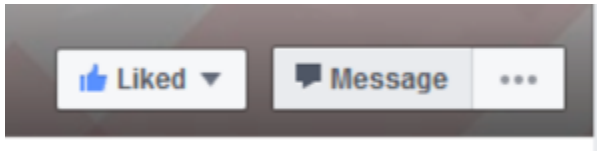


Scenario 4: Facebook - private messaging

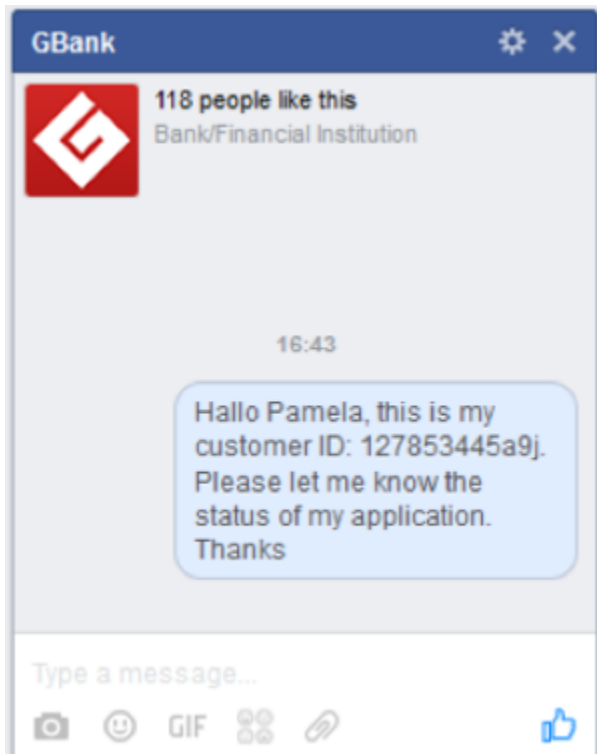
A Facebook Messenger interaction can only be initiated by the social media user, and not directly by

the agent.

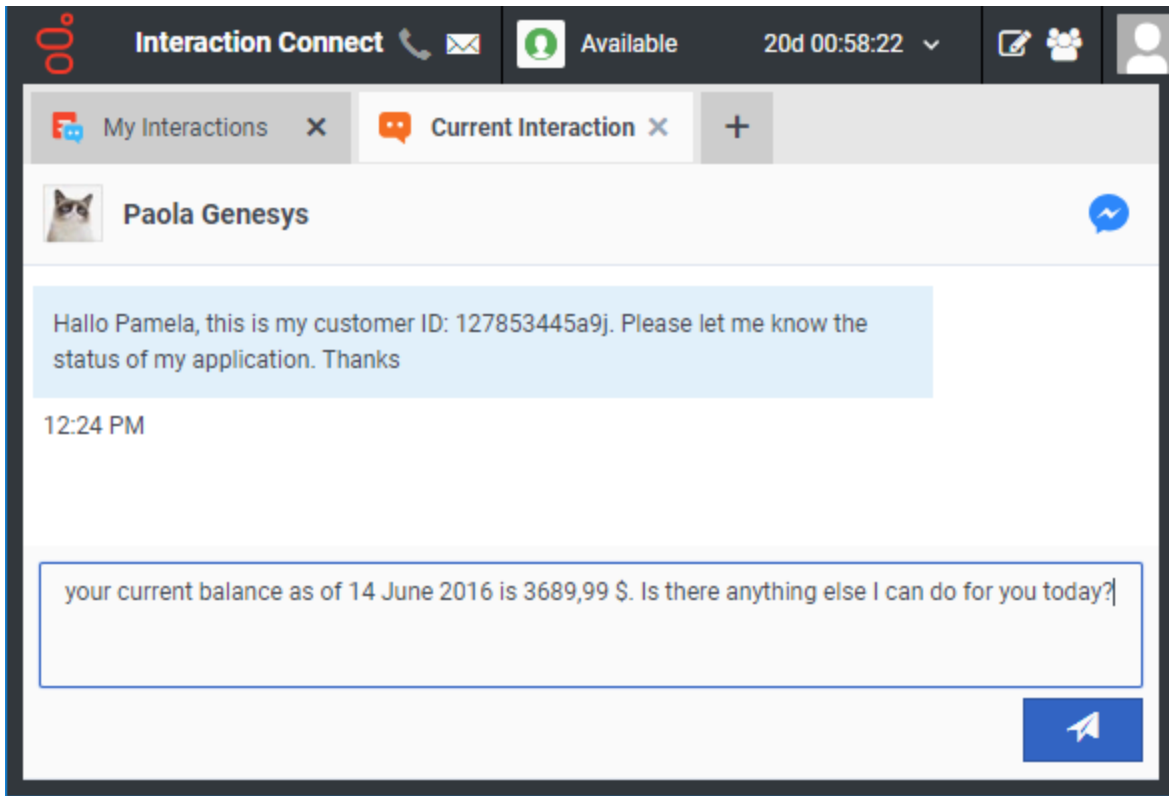
The customer needs to invite the company to a chat session via the “Message” button on the main Facebook page.



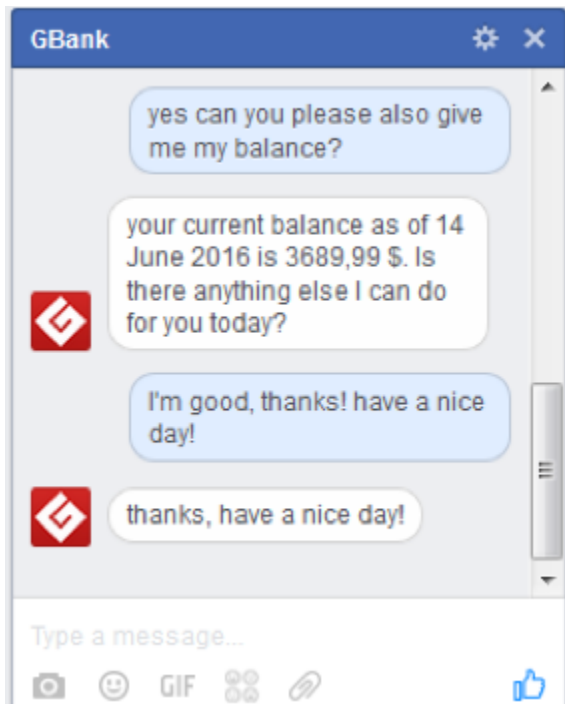
PureConnect receives the Messenger message and routes that interaction to the next available agent in the workgroup configured for that Facebook page.



The agent is then assigned the Facebook Messenger interaction.



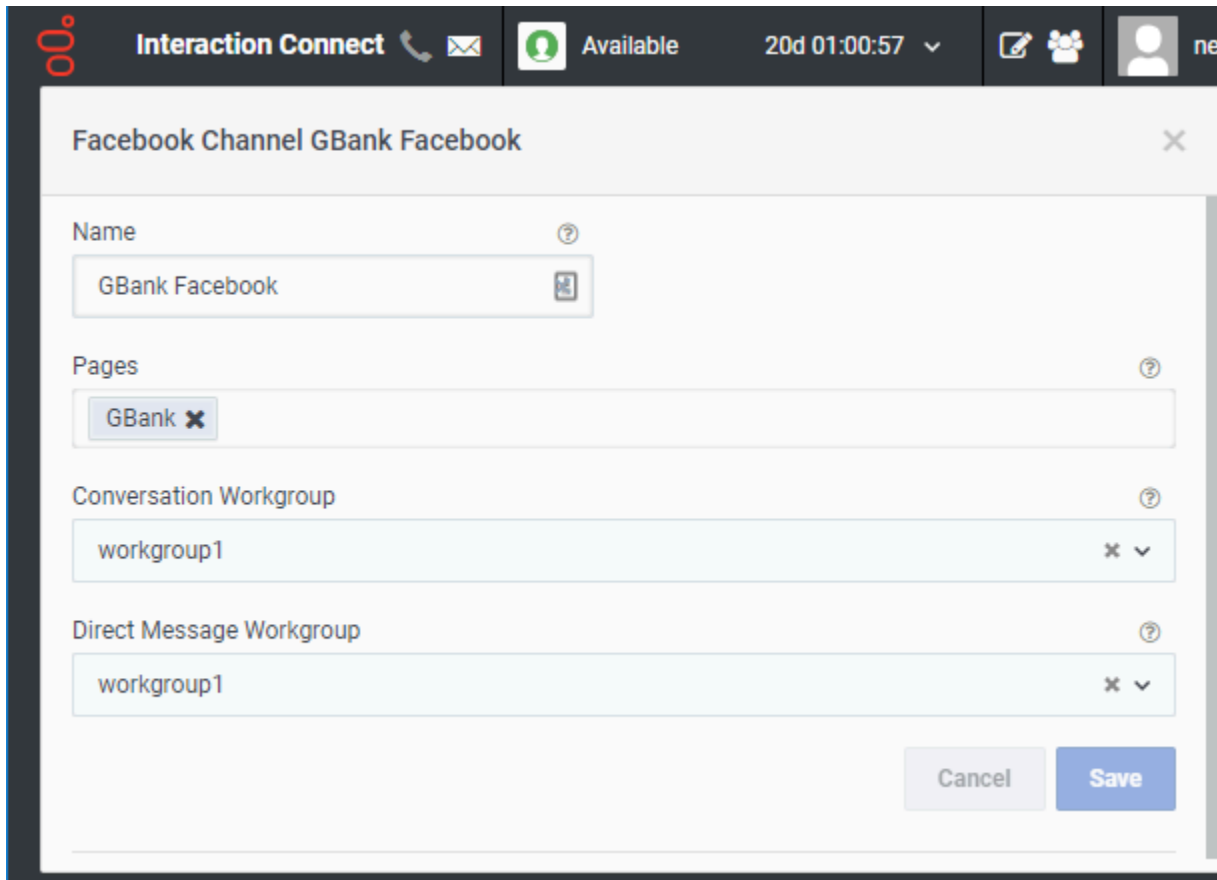
The agent picks up the Facebook Messenger interaction and begins a chat conversation with the customer.



PureConnect sends the agent's replies back to the social media user in Facebook Messenger.

Facebook Channel Configuration

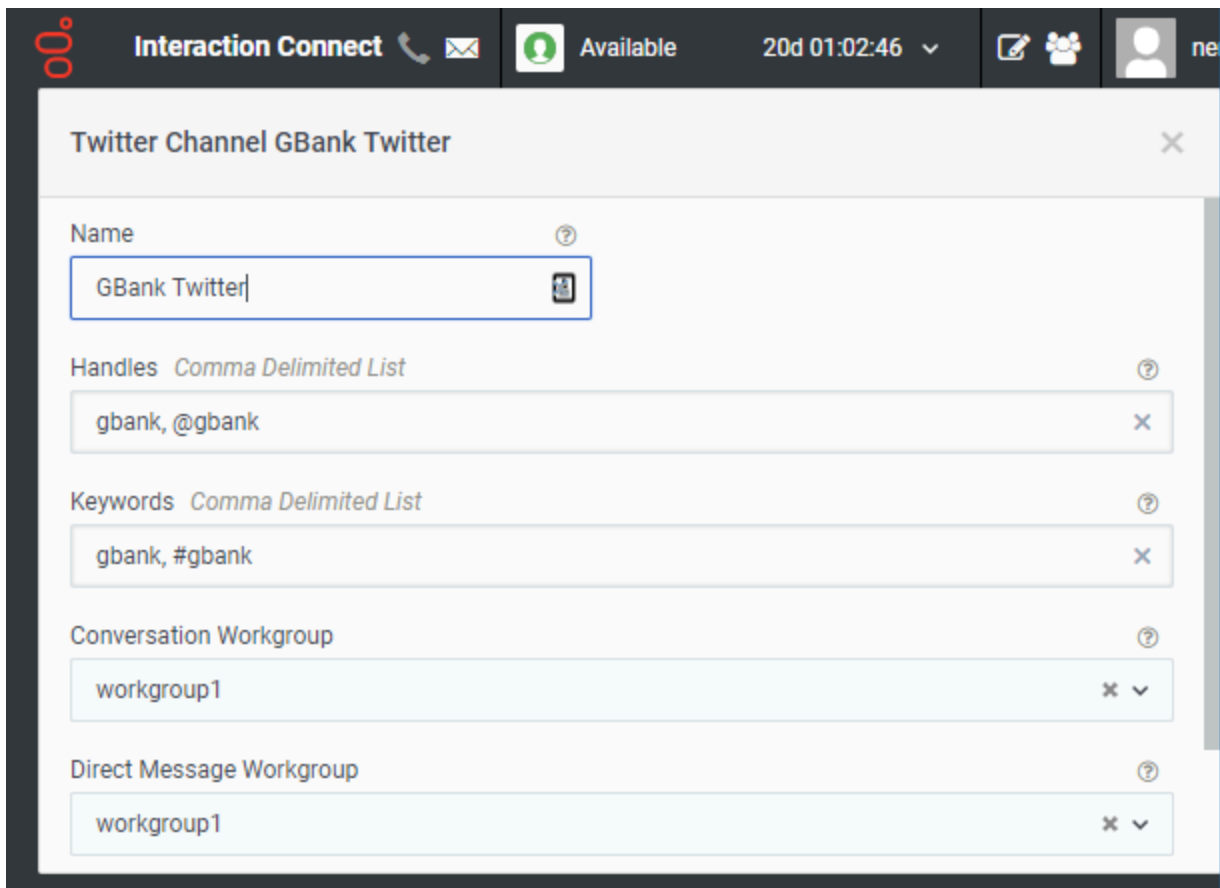
An admin can add and remove Facebook accounts in Interaction Connect. The Facebook accounts added should be associated with Facebook pages. The Facebook pages are the representation of the business for Facebook. A Facebook channel is an association of a Facebook page or pages and the workgroups to route the Facebook public posts (conversations) and Facebook Messenger messages (private messages).



Twitter Channel Configuration

An admin can add and remove Twitter accounts to PureConnect. The Twitter accounts are the business representation of the company for Twitter.

A Twitter channel is an association of Twitter handles and keywords to filter on and the workgroups to route the Twitter public posts (conversations) and Twitter direct messages.



Distribution Logic

Facebook and Twitter social media interactions are distributed to agents based on the workgroups configured for the Facebook and Twitter channels.

User Interface & Reporting

Agent UI

The following lists the minimum requirements for PureConnect Social Media:

- Social Media feature license enabled.
- Agent has ACD Social Media license.
- PureConnect Social Media is enabled and Facebook and/or Twitter accounts and channels are configured.
- Agent is in workgroup configured for Social Media interactions.

Reporting

Real-time Reporting

Minimum Requirements:

- ICBM Statistics Views
- ICBM Reporter Views

ICBM System Statistics View

- Longest Social Conversation
- Longest Social Direct Message
- Active Social Conversations
- Active Social Direct Messages

Other ICBM Statistics Views

- All non media-type specific interaction statistics supported.

ICBM Reporter Views

- All non media-type specific interaction real-time reports supported.

Historical Reporting

Minimum Requirements:

- ICBM Reporter Views
- All non-media-type specific interaction historical reports supported.

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

- Interaction Connect is used as agent desktop.
- Please note that public posts, comments and tweets can be edited or deleted by a user while an agent works on a resolution, which is not addressed or reflected in this use case.

Customer Responsibilities

- PureConnect Social Media is configured to handle interactions from the company's Facebook Page and/or Twitter handle.

Document Version

- Version **ver 1.0.0** last updated **March 27, 2025**

Genesys Digital Callback (CE22) for PureConnect

Enable customers to request a callback from your website or app

What's the challenge?

When customers can't find the answers they need on your website or app, they want to speak with someone who can help quickly. For online consumers, who are a click away from the competition — frustration over long hold times or ill-equipped agents — results in lost sales and lower customer experience scores.

What's the solution?

With just a single click, Genesys Callback provides your digital customers the option to request a return call instead of waiting on hold. And because callback routing uses skills-based routing, these requests can be intelligently routed to the individual best equipped to help.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

Sometimes customers who are browsing your website or mobile app realize they need agent assistance. You can create a seamless transition by offering a callback option that gets the customer to the right agent based on their stated issue. The contact center agent is provided with context of the request for a seamless customer experience.

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:

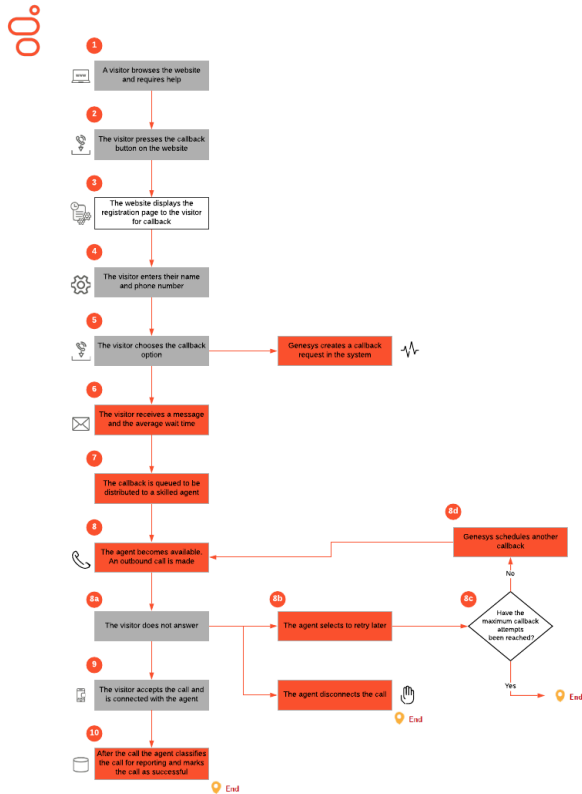
Use Case Benefits	Explanation
Improved Customer Experience	Address customers' requests in a timely manner to lead to better NPS, and provide seamless transition from self-service to assisted service and reduced queueing time
Improved Employee Utilization	Improve agent occupancy by enabling callback and routing interactions to the best agent through skills-based routing with context
Improved First Contact Resolution	Match the right agent to the customer the first time by enabling callback and routing interactions to the best agent through skills-based routing with context
Increased Revenue	Improve online sales conversions by enabling callback and routing interactions to the best agent through skills-based routing with context. Enabling click-to-call option on your website or your app, we can increase online conversions with easy access to assisted service at the customer's preferred time.
Reduced Handle Time	Decrease handle time and queue time through a callback scheduled at the caller's convenience. Customer Context Data is also collected and passed to the agent, thus shortening interaction times due to agent knowing subject matter of request in advance.

Summary

A customer browses the company's website or mobile application and requests a callback from the contact center for additional support. The customer provides their information, including the subject of their inquiry, and chooses either a callback as soon as possible or within a convenient time frame. At the designated time, a call is placed to the customer and they are connected to an agent with the matching skill needed given the provided subject of the call.

Use Case Definition

Business Flow



Business Flow Description

1. The website visitor browses the company's website and requires help.
2. Customer checks if agents are available, logged in, the wait time (through the use of Genesys APIs) or creates their own schedules to be able to make intelligent decisions as to when to offer the callback feature to their visitors. The visitor clicks the Callback button.
3. The website has the option to display a brief registration page to the visitor. Genesys provides a standardized template for the company website to configure callback options.
4. The visitor enters their name and phone number. The following are options the customer can develop for website or mobile visitors:
 1. Automatically set the name and phone number for an authenticated visitor.
 2. Use page-specific logic to designate a specific workgroup for call routing, based on the webpage from which the callback is requested.
5. The visitor chooses to make the callback and a corresponding callback request is created within the Genesys system.
6. The visitor receives the message that an agent will call back. The message also includes the average wait time for the queue.
7. The callback is queued to be distributed to the appropriate workgroup.
8. When an agent becomes available, the agent receives a callback pop-up. The agent initiates the call.

1. If the site visitor does not answer the callback, the agent is given the option to disconnect or retry later.
2. If the agent selects disconnect, the callback ends.
3. If the agent selects retry later, the system uses a configurable time and number of attempts for the callback.
4. Callback is presented for the agent to retry for the number of attempts designated in the system.
9. The callback recipient accepts the call and is connected to the agent.
10. After the conversation between the agent and the callback recipient ends, the agent can mark the callback as successful and set a wrap-up code for reporting purposes via the agent desktop.

Business and Distribution Logic

Business Logic

The following parameters are configurable for callbacks:

- Maximum number of times a callback is presented to an agent.
- Length of time until the next callback attempt is presented.
- Priority assignment for callback requests. This is important when this use case is used in combination with other inbound media types (e.g., inbound calls or email). All callback requests have the same priority.

Distribution Logic

The following lists the minimum functionality for distributing a callback generated from the webpage to agents:

- Routing of callback requests to agents is based on the workgroup. The workgroup is provided via website development during the callback initiation.
- If this use case is used in combination with other use cases for inbound interactions of a different media type: Blending with other media types is supported, including configuration of capacity rules.

User Interface & Reporting

Agent UI

The following lists the minimum functionality for the agent's callback interface:

- Configuration of not-ready reason codes (Away from Desk, Training, Meeting, etc.).
- Display of user name, user phone number, subject, and target (as provided by the web app).
- Wrap-up codes to classify call and call outcome for reporting purposes.

Reporting

Real-time Reporting

Premises and Cloud

IC Business Manager is a Genesys PureConnect 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. The widgets display information about specific key performance indicators, such as service level, callback interactions handled, and the average handle time. With IC Business Manager, a customer can:

- Monitor the current state and activity of contact center objects to help make decisions about staffing, scheduling and callback routing strategies.
- Create widgets from scratch or user-defined templates for a fast and easy text or graphical presentation of selected or user-defined object statistics.
- Monitor operational callback activity through the Queue Activity views.
- Monitor agent resource activity through the Agent Activity views.
- Monitor tenant service level through the Service Level views. Below are several examples of dashboards that are available in IC Business Manager.

Historical Reporting

Premises and Cloud

IC Business Manager out-of-the-box reports are used to:

- Assess the day-to-day operations of the contact center resources for the routing and handling of interactions.
- Measure the effectiveness of the routing rules and efficiency of the use case.
- Calculate the conversion success rate using disposition/wrap-up codes.
- Evaluate resource performance with a variety of reports for agents and interaction details. There are many reports available, including the following.

Queue Service Level - The Queue Service Level report provides the ability to see the summary and

details of up to 12 configured service levels in an absolute or cumulative view with a percentage option for the relevant media type.

Queue Summary and Detail -The Queue Summary and Detail report displays summarized statistical data along with detailed statistics on Workgroup Queues. The statistics are reported, grouped, and summarized by any combination of Queue, MediaType, Interval, Skill or DNIS. Data for calls Answered or Abandons is summarized and displayed when a single service level configuration is present in the data selected, but is otherwise suppressed. The report also displays a chart for Interactions Distributions and Service Level.

Agent Utilization Report - The Agent Utilization report displays time usage information by agent across all campaigns, including: talk, ACW, non-Dialer, idle, break, preview.

For more information, see [About Interaction Reporter](#).

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

- A configured media server and a PureConnect client are required.
- IC Business Manager is required for real-time and historical reporting.
- Interaction Desktop or Interaction Connect are used for the agent desktop.
- There are no integrations with third-party systems.

Customer Responsibilities

The specific configuration and features of digital callbacks are the responsibility of the customer. Web development work is needed to complete the deployment. Web or mobile scenarios may need to be considered. Genesys provides an API for integration with Genesys, which enables the functionality described in this document. Genesys Professional Services can provide consulting services to introduce web developers to the API. The integration needs to satisfy the following requirements:

- An integration with Web Services API delivers the following data to the Genesys system with every callback request:
 - User name (optional)
 - User credentials (optional)
 - User telephone number (mandatory)
 - Subject (mandatory)
 - Language (mandatory)
 - Target -workgroup or user (mandatory)
 - Target type (mandatory)
 - Context (optional)
 - Custom info (optional)
- The company is responsible for the development of the website logic that calls the Genesys API as described in the use case above.
- The company has the option to configure callback components via the Genesys API, including checks for whether agents are available, logged in, the wait time, and when to offer the callback feature to their site visitors.

Document Version

- Version **v 1.0.1** last updated **March 27, 2025**

Genesys SMS Routing (CE29) for PureConnect

Route SMS interactions to the best resource

What's the challenge?

Your customer wants to contact you in the same way they would friends and family — instantly, conveniently, and personally, with freedom to keep moving. If they encounter constraints, excessive hold times, inconsistent responses or multiple calls, that can damage customer satisfaction and put a strain on your agents.

What's the solution?

Connect a customer to the right resource anywhere in your business by routing customer text messages to your best-fit agents. Genesys SMS Routing uses skill-based routing so messaging your company for support is faster and more efficient than calling and enables conversations from anywhere.

Other offerings:

Genesys Cloud Genesys Engage on-premises

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Use Case Overview

Story and Business Context

In today's digital world, customers want a simple, convenient method of communication through their preferred channel at a time that meets their schedule. Increasingly customers are choosing asynchronous channels, such as SMS, for the convenience it provides. Using SMS customers can avoid having to call and wait on hold for an available agent. SMS also allows customers to engage "on the go" without a dedicated mobile app. And because customers engage via SMS at faster rates than any other messaging channel, issues can be resolved more quickly.

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	Combine text messaging with automated responses to boost agent productivity.
Reduced Handle Time	Route SMS messages to the right skilled agents through skills based routing
Reduced Transfers	SMS interactions captured by the Genesys system go through content analysis to assign a category that allows the best agent with the skills to the corresponding category. The result is correct transfer of SMS and avoidance of misrouted SMS and unnecessary costs.

Summary

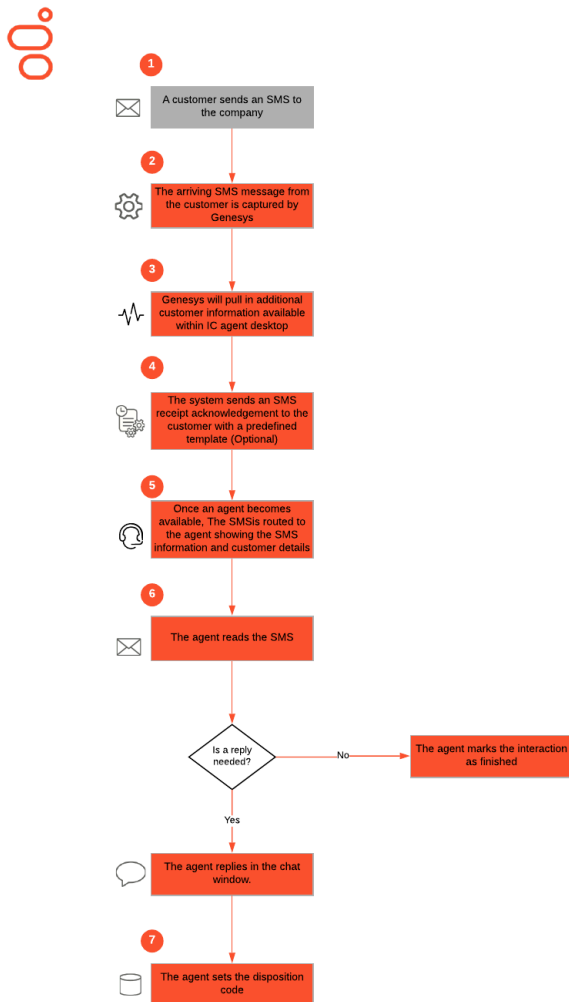
A customer sends an SMS to a company. The SMS is captured by the Genesys system and a content analysis is performed to assign a category to the SMS. It is then queued to the best available agent with the skill set corresponding to the category. After the agent has completed the SMS response, a supervisor may review the SMS, depending on the agent, for quality management. Priority tuning improves the SLA adherence to customers' SMS messages. The use case provides reporting capabilities to provide management visibility into the SMS interaction channel.

Use Case Definition

Business Flow

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

The following diagrams show the business flow of the use case:



Business Flow Description

1. A customer sends an SMS to a company short code or long code number. The SMS message is captured from a carrier and passed to Genesys to be handled by agents.
2. The new SMS message is captured by Genesys, including the customer's phone number as metadata.
3. Genesys will pull in additional customer information available within IC agent desktop. (Tracker data)
4. The system can send out a receipt acknowledgement SMS to the customer with a predefined template configured in Administrator. (Optional)
5. Once an agent within the workgroup for the short/long code is available, the SMS is routed to the agent's desktop application with screen pop showing related SMS information. Any available contact information from Tracker data will be displayed.
6. Once the agent reads the SMS, he or she needs to decide if a reply is needed.
 - If no reply is needed, the agent marks the interaction as done.
 - If a reply is needed, the Agent replies in the chat window, potentially using a standard response template.
7. The agent sets a disposition code to mark the business outcome for reporting purposes once they disconnect the interaction.

Business and Distribution Logic

Business Logic

In the logical flows in the previous sections, there are a number of process steps driven by configuration parameters and additional business logic within the system. These parameters and the underlying logic are

described in this chapter.

SMS message Categorization

Keyword Matching is a method for categorizing of SMS. This is a system wide setting and only one method will be used at any given time. (Optional)

Keyword Categorization

As an alternative to advanced content analysis, it is possible to replace this functionality with more straightforward keyword matching categorization. Keyword matching allows the system administrator to configure a number of screening rules to identify SMS belonging to different categories. For example, an SMS message that contains the word “order” would be categorized as a sales SMS. Screening rules can be configured to look for regular expressions that look for different words or phrase patterns that help categorize SMS messages. Additionally, screening rules can be used to detect patterns like customer ID, and account number to either display or mask sensitive information to the agent. Configuration of up to three regular expressions to display to the agent / mask information are within the scope of this use case.

Distribution Logic

N/A

User Interface & Reporting

Agent UI

The following lists the minimum requirements for the agent desktop:

- Configuration of not-ready reason codes (Admin Work, Lunch, Meeting, Pause, and Training).
- Configuration of disposition codes
- Access to standard response library
- Agent to Agent transfer
- Agent to Queue transfer
- Recorder functionality for supervisors
- Interaction Queue Management for supervisors

Reporting

Real-time Reporting

Premises and Cloud

IC Business Manager is a Genesys 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 IC Business Manager you can:

- Monitor the current state and activity of contact center objects to help make decisions about staffing, scheduling, and chat routing strategies.
- Create widgets from scratch or user-defined templates for a fast and easy text or graphical presentation of selected or user-defined object statistics.
- Monitor operational chat activity through the Chat Queue Activity views.
- Monitor agent resource activity through the Chat Agent Activity views.
- Monitor tenant service level through the Chat Service Level views.

SMS messages are included with the webchat type for reporting.

Historical Reporting

Premises and Cloud

IC Business Manager out-of-the-box reports are used to:

- Assess the day-to-day operations of the contact center resources for the routing and handling of interactions.
- Measure the effectiveness of the routing rules and efficiency of the use case.
- Calculate the conversion success rate using disposition/wrap-up codes.
- Evaluate resource performance with a variety of reports for agents and interaction details. There are many reports available, including the following.

Queue Service Level - The Queue Service Level report provides the ability to see the summary and details of up to 12 configured service levels in an absolute or cumulative view with a percentage option for the relevant media type.

Queue Summary and Detail -The Queue Summary and Detail report displays summarized statistical data along with detailed statistics on Workgroup Queues. The statistics are reported, grouped, and summarized by any combination of Queue, MediaType, Interval, Skill or DNIS. Data for calls Answered or Abandons is summarized and displayed when a single service level configuration is present in the data selected, but is otherwise suppressed. The report also displays a chart for Interactions Distributions and Service Level.

Agent Utilization Report - The Agent Utilization report displays time usage information by agent across all campaigns, including: talk, ACW, non-Dialer, idle, break, preview.

For more information, see [About Interaction Reporter](#).

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

- An SMS server must be purchased in each Genesys DC to serve as the reverse proxy server for cloud customers.

Customer Responsibilities

- Requirements for integration with SMS Aggregator
 - Check local requirements for character set, against SMS Server's supported list (Deployment Guide and Release Notes)
 - Best practice recommends to keep in mind the 160 character limit in the U.S., check on SMS Center restrictions
- Customer has secured and provisioned a dedicated short code, long code, or text-enabled toll-free number in order to send SMS messages
- SMS requires a reverse web proxy server, that is typically provided by premise customers. For cloud customers a web server must be purchased to server as the reverse web proxy.
- Customer will need to review the content and volume of messaging traffic to comply with short and long code regulations from the CTIA (Wireless trade association that governs SMS usage.)
- Configuration, SMS routing, and testing steps will need to be handled by some team in coordination with the message broker. This might be handled by Genesys professional services, an implementation partner, or the customer. It requires experienced SMS routing, setup, and troubleshooting capability.
- Genesys broker is the preferred solution.

Document Version

- Version **v 1.0.2** last updated **March 27, 2025**

Genesys Chatbots (CE31) for PureConnect

Use chatbots to automate customer conversations and seamlessly hand over to a chat agent when needed.

What's the challenge?

Many customer service, sales or support conversations with customers are repetitive — frustrating both to customers and to employees. If you could insert better automation, many conversations may well be taken care of in the entry process, saving time while also increasing customer satisfaction.

What's the solution?

Blended AI chatbots automate natural language conversations, even across channels. Genesys blended chatbots look up customer information and activity to answer questions. They can hand over conversations with context to an agent when needed, or even offer a callback¹ during or after hours.

¹Callback option is available for Genesys Engage only.

Other offerings:

Genesys Cloud Genesys Engage on-premises

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Use Case Overview

Story and Business Context

The proliferation of digital channels has led to more demanding customer expectations and a drastic increase in the number of interactions that companies have to deal with when servicing their customers. Coupled with increased usage of AI for business applications, this has resulted in organizations implementing chatbots that can interact with customers to automate tasks and assist their queries on channels such as web, mobile, social, SMS, and messaging apps.

Chatbots can alleviate strain on contact center employees while improving the customer experience and controlling costs. Chatbots are always on and available, and automated chats. Chatbots are always on and available, and can be handed over to an agent at any time if needed.

While chatbots can also be used by employees and for business optimization purposes, the remainder of this document refers to omnichannel bots in the context of customer engagement. The primary benefits of chatbots are to increase self-service success, deflect interactions from the contact center, and improve the customer experience. Benefits typically include:

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	Increase self-service interactions to reduce agent-assisted interactions for repetitive or common requests
Improved Customer Experience	Reduce the time required to address the customer request handle off hour requests, offer immediate options and improve outcomes.
Improved First Contact Resolution	Present a customer experience that is tailored to the individual based on who they are, why they might be interacting, and the status of the contact center

Summary

Genesys supports a “design once, deploy anywhere” concept for bots to enable organizations to provide a seamless customer experience across voice and digital channels. This use case, however, focuses on deploying a bot on web chat, mobile chat, Facebook Messenger and/or SMS.

The chatbot supports or orchestrates the following capabilities:

- Personalization - to tailor the experience based on context from the current interaction or from previous

interactions

- Natural Language Understanding – to derive intents and entities
- Identification & Verification (ID&V) – to identify and verify the customer if required
- Directed Dialog – to automate relevant business processes or provide information
- Involve another NLU/AI platform including (e.g. Amazon Lex, Microsoft bot framework, IBM Watson or Google Dialogflow) – if it specializes in a particular topic
- Hand-off to an agent – to connect the customer to a live person with the full context of the interaction
- Offer a chatbot survey depending on business context

Use Case Definition

Business Flow

When a customer interacts through a supported Genesys digital channel, a chatbot is initiated. The chatbot first attempts to use context to anticipate why the customer may be engaging and in turn provides personalized messages or options to resolve the query. If no personalization options exist, the chatbot asks the customer an open question, such as "How may I help?"

Once the customer responds, the chatbot tries to interpret the request to determine intent and then decide on what to do next. For example, if the customer replied with "I want to check my balance," the chatbot would first identify and verify them before showing their balance.

If intent is not established or understood, the chatbot presents a retry or max retries message.

Once the task is completed, the chatbot asks if the customer still needs help. The customer can respond by asking another question, requesting to chat with an advisor, or replying 'no'. If the customer replies with 'no', the chatbot can offer a survey based on context.

If the customer chooses to speak or chat with an agent and there is a long wait time, or if it is outside of business hours, the chatbot can offer a callback option or present a suitable offer.

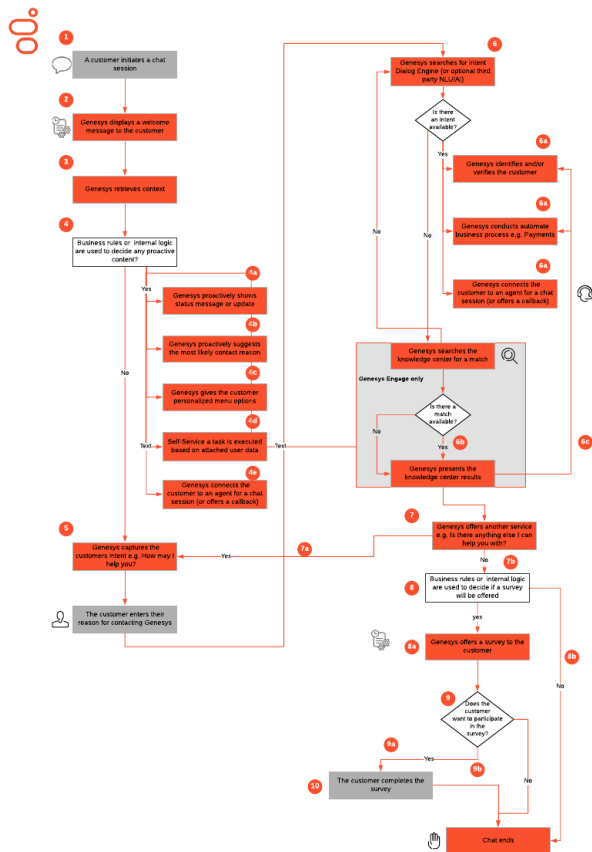
The chatbot continues in this fashion, creating a conversational loop and building up context between itself and the customer to better solve their query.

The following diagram shows the business flow of the use case:

Business and Distribution Logic

Business Logic

BL1: Agent Hand-off: The customer can ask to be connected to an available agent. At that point the chatbot is disconnected and the chat transcript (excluding sensitive data) is displayed in the agent desktop. Other context can also be displayed as Case Data.



Business Flow Description

1. A chat interaction is initiated (reactive or proactive) across a supported channel.
2. The customer receives a standard welcome message from the chatbot.
3. Customer information and/or context is retrieved from:
 - Genesys User Data (e.g. Altocloud Segment or from the website passed by Genesys Widgets)
 - Journey context available from Altocloud or customer journey data
 - API call to third-party data source
4. The customer receives a personalized message/menu or is handed over to an agent. Examples include:
 - Custom message or update: "Your next order is due to be delivered on Thursday before 12."
 - Most likely contact reason: "Do you want to find out about the loan application you have in progress?"
 - Tailored menu with most likely options: "Main menu: you can choose Balance, Payments, or TopUps."
 - Self-service task, such as loan application, is executed based on Segment provided by Altocloud or other attached user data.
 - Customer is handed over directly to an agent because they have an outstanding balance (or is able to request a callback).
 - If the customer is not handed over to an agent, the customer could end their chat, confirm the contact reason, or continue.
5. Assuming the customer has moved on from the Personalization stage, the chatbot asks an open-ended question like: "How may I help you?" to determine intent and capture the customer's response. (BL3)
6. The customer's response is then sent to a third-party NLU engine via API. (BL1-BL4)

BL2: Retries: The number of retries for self-service

tasks and questions can be configured by a business user. Upon maximum retries the dialog can be configured to present a message, hand off to an agent, or offer a callback if busy or outside of business hours.

BL3: Response Type: The interaction flows can be configured to accept natural language responses as well as closed responses, such as account number, date of birth, and yes/no questions. This means that customers can backtrack to a different point in the dialogue when required. For example, if a customer is midway through making a payment and says “actually just tell me where your nearest branch is,” then the chatbot shows the nearest branch.

BL4: Callback: If outside of business hours, or estimated wait time (EWT) is high, the chatbot can offer an immediate callback. If this option is not included, then a message states that a transfer is not possible.

BL5: Survey: The customer can determine whether to address a survey or not. This can be based on:

- Genesys User Data
- Journey context from Altocloud or customer journey data
- API call to third-party data source
- Internal logic

Distribution Logic

When the conversation is handed over to a live agent, the interaction moves to one of these use cases, depending on the channel the customer is using:

- Genesys Chat Routing (CE18) for PureConnect
- Genesys Social Media Routing (CE19) for PureConnect
- Genesys SMS Routing (CE29) for PureConnect

User Interface & Reporting

Agent UI

Are handled as part of channel-specific use cases:

-
-
-

- If intent and entities are returned, the conversation moves to the correct point in the interaction flow, which could be within one of the following sub-flows (or microapps):
 - Identification and Verification.
 - Automated business process (such as payment collection microapp).
 - Hand-off to live agent or request a callback (see the relevant use case for the channel).

- If intent and entities are not returned the chatbot returns a retry message like: "Sorry, we didn't understand your question. Please ask another question or reply AGENT for live assistance."

7. Upon completion of a task, the chatbot asks a follow-up question like: "Is there anything else I can help you with?" (BL2-BL3)
 - If the customer responds “yes,” they're brought back to Step 5: "How may I help you?"
 - If the customer responds “no,” the chatbot decides whether or not to offer them a survey (see the next step).
 - If the customer responds with a more advanced answer, the response is sent to a third-party NLU engine via API to determine intent and entities for further processing.
8. Customer information and/or context is retrieved to determine whether to offer a survey. (BL5)
 - Logic defined in Intelligent Automation
 - If a survey is to be offered, the chatbot continues to the next step.
 - If no survey is to be offered, the chatbot continues to step 11 and shows a goodbye message.
9. The chatbot asks the customer: "Would you like to participate in our survey?"
 - If the customer answers "yes," then they continue to the next step and engage in a survey.

Chat transcript between customer and chatbot is populated in the chat interaction window in the agent desktop.

- If the customer answers "no," then they continue to the final step and are shown a goodbye message.

Reporting

Real-time Reporting

- Current Chat interactions waiting in the system
- Total Chat interactions
- Agent Group Status

Historical Reporting

Historical reports cover:

- How many conversations took place over a period of time
- Length of time for each conversation: maximum/minimum/average
- How many unique customers/contacts and how many repeat customers/contacts

10. The chatbot offers the customer a survey. The survey questions are configurable by the customer on a business-as-usual basis and therefore no dialog flow is defined here. This dialog uses the Intelligent Automation Questionnaire Builder microapp.
 - The chatbot presents a concluding message and ends the chat.

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	Digital <ul style="list-style-type: none"> • Genesys Chat Routing (CE18) • Genesys Social Media Routing (CE19) • Genesys SMS Routing (CE29) 	Digital <ul style="list-style-type: none"> • Genesys Predictive Engagement (CE37) 	None

General Assumptions

- Supported channels include web & mobile chat, Facebook Messenger, Twitter, and SMS. The LINE integration through web chat will be improved and WhatsApp will be added in H2 2019.
- This use case is supported by industry templates that contain examples of chatbot applications combining personalization, natural language understanding, AI, and microapps. Chatbot application requirements including required microapps will be confirmed during design. These application templates will be created for Financial Services, Telco, and Travel.
- Hand-off to agent is on the same channel (unless click-to-call or callback).
- Supported third-party NLU/bot platforms are Microsoft bot framework, IBM Watson, Amazon Lex and Google DialogFlow.
- Our schema-based approach to supporting the big four bot providers can also be used for other bots via customization.
- Rich Media (for example buttons & carousels) requires PS customization.
- Secure payment options vary by channel (for example, Apple Pay on Apple Business Chat is secure; SMS is not).
- The Genesys Intelligent Automation Control Center to configure Chatbots is currently localized to support the following languages:
 - English (United Kingdom)
 - French
 - Spanish (Mexican)
 - German
- Callback requires customization from professional services for Intelligent Automation to make callback requests to PureConnect.
- Chat transcript is not passed to callback agent.
- Survey dialog flow is provided by Questionnaire Builder microapp. Results available for download from Intelligent Automation Control Center or via web service.
- Dialog Engine is not available for PureConnect. It is only available for Genesys Cloud CX.

Document Version

- Version **v 1.1.1** last updated **March 27, 2025**

Genesys Predictive Engagement (CE37) for PureConnect

Important

Please be advised that this use case has been merged with Genesys Predictive Engagement (SL09). SL09 has now been decommissioned and all relevant content is displayed in this use case.

Use AI powered journey analytics to observe website activity, predict visitor outcomes, and proactively engage with prospects and customers via agent-assisted chat, content offer or chatbot.

What's the challenge?

It's challenging to identify the right individual, the best moments, and the optimal ways to offer assistance online. Companies want to shape their customers' journeys and drive them towards desirable outcomes, but it's hard to utilize all of the available data in a way that is meaningful and actionable. In addition, consumers expect fast answers, but it's expensive to always engage an agent.

What's the solution?

Proactively lead customers to successful journeys on your website. Apply machine learning, dynamic personas, and outcome probabilities to identify the right moments for proactive engagement via a web chat or help content screen-pop.

Other offerings:

Genesys Cloud Genesys Engage on-premises

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Use Case Overview

Story and Business Context

One of the biggest challenges for the modern business is learning to work with the data available in a way that is both meaningful and easy to act on. The data generated by a website often goes unexplored, and as a result, the intentions and reactions of individual customers and prospects can be overlooked. Focus is often placed on the broad strokes—key metrics such as the number of conversions per month—and the ability to identify the potential customers who need engagement is lost. As a result, customers who may be on the verge of signing up for a trial, completing a checkout, searching for information regarding service or support, or any other desirable outcome, fall through the cracks. The high volume of website traffic makes it a challenge to identify the right individuals, best moments, and optimal ways to engage in real-time. Expectations for time-to-respond are increasing but growing your staff is costly.

Genesys Predictive Engagement uses machine learning to observe the progress of website visitors toward defined business outcomes—such as purchase completion or requesting a quote. It enables the business to use real-time observations and predictions rather than static rules, to trigger intervention only at the points when it is needed most.

For customers seeking service or support, a company's website is often the first point of contact, even if it is only to find a phone number to call. But companies are challenged with making sense of and learning to use all the data generated by their website in a way that is both meaningful and actionable in real time. As a result, customers either end up calling into the contact center (an expensive support channel) or get frustrated with your business because they can't find the help they need. Genesys Predictive Engagement prioritizes engagement with high value visitors and proactively offers chat to better utilize your staff and reduce your costs.

Examples of how the customer experience can be optimized by using data, context, and website behavior for a predictive engagement:

- Use of machine learning to detect the progress of website visitors toward defined outcomes—purchase completion, requesting a quote—and enable the business to trigger intervention only at the points when it is needed most.
- A customer who is recognized to be having trouble submitting a loan application is prompted with a proactive web chat enabling an agent to help the customer walk through the steps.
- A customer needs to activate their new mobile phone, goes to the website, and searches for "device activation." A proactive chatbot is offered to help the customer walk through the steps.
- A customer is planning a trip abroad and needs to notify their credit card company. They go to the company's website and based on a search related to "travel alert," a chatbot is offered to assist to prevent the need to call the contact center.
- A customer is proactively offered self-help options to assist with a transaction, for example providing a link to a video to help with a Return Merchandise Authorization (RMA).

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 Conversion Rates	Follow individual customer journeys in real time on your website. Identify the moment of struggle or moment of opportunity and launch a chat or voice interaction with a sales agent at the right time to increase lead volume, improve lead qualification and reduce customer churn.
Improved Customer Experience	Offer assistance only as needed to reduce customer annoyance.
Improved Employee Productivity	Representatives are empowered with real time customer journey data which allows them to personalize and prioritize engagements with prospective and existing customers.
Increased Revenue	Retain customers by increasing customer satisfaction with faster and more personalized service. Improve the ability to up-sell and cross-sell existing customers with data based on their current interests, online journeys, and prior purchasing behavior.
Reduced Handle Time	When the engagement requires escalation from self-service to assisted service, the agent is provided context of the journey.

Summary

Understanding and using knowledge of online activities and behaviors can provide context to better handle a follow-up digital or voice interaction to help customers who are shopping, buying, using the company's products across the full customer life cycle. This engagement intelligence can also be used for converting service requests to sales opportunities for cross-sell or up-sell. Genesys uses artificial intelligence to observe and analyze the progress of website visitors toward defined outcomes - service requests, pending transactions, application status. This technology allows the business to engage with customers using dynamic observations and predictions rather than simple static rules- creating happier customers, smarter employees, and better outcomes.

Companies have vast amounts of data within their CRM, marketing automation, contact centers and websites, and Genesys enables companies to unlock that data in real time to engage customers proactively, eliminating the need for a voice call or contact without context. Genesys Predictive Engagement observes individual customer journeys on your company website and applies machine learning, dynamic (or audience) segmentation, and real-time outcome scoring to identify the right moments for proactive engagement with the right customer via chat, chatbot, or content offer. When the visitor interacts, the sales rep has the customer journey information at their fingertips.

Predictive Engagement's real-time engagement sophistication increases customer satisfaction, improves conversion rate, and optimizes the use of agent resources for the highest value customers. Predictive Engagement leads to improvement of key performance indicators such as call deflection, average order value (AOV), first contact resolution, and conversion rates.

Use Case Definition

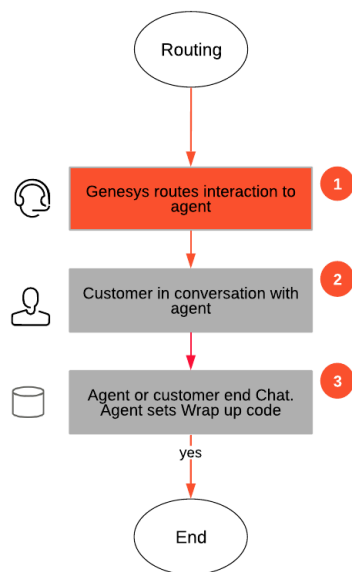
Business Flow

(1) Main Flow

Business Flow

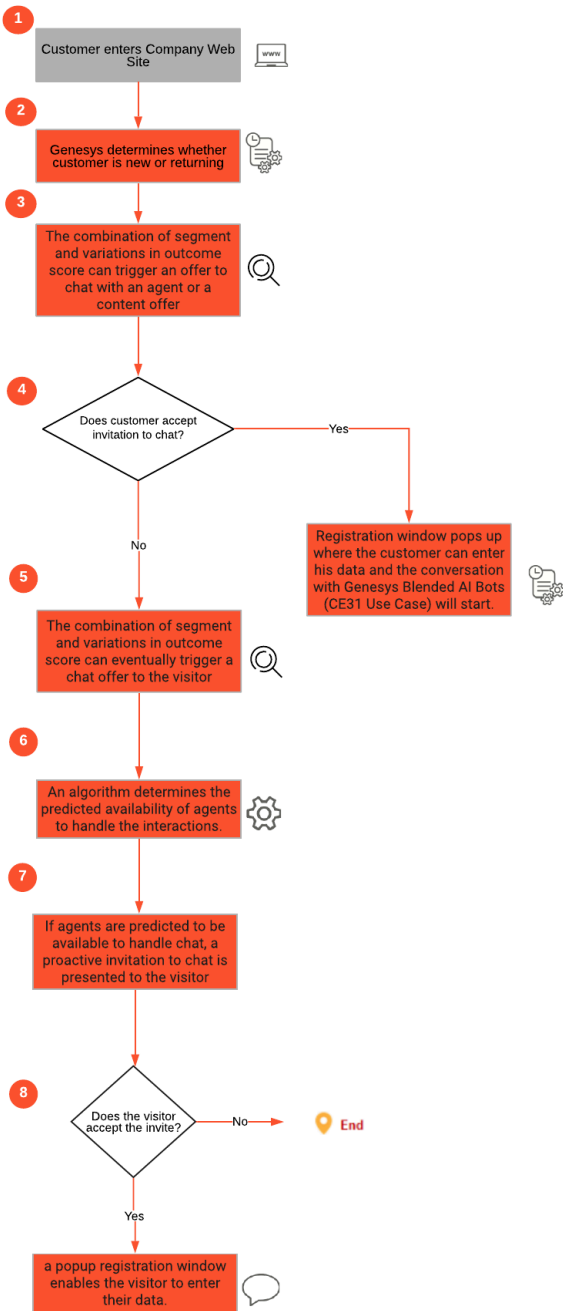
(2) Routing

This diagram details the routing that takes place before and during the chat.



Business Flow Description

1. Genesys routes the interaction to an agent based on the skills, media, language, and other ACD routing choices.
2. An agent and customer are in conversation. The agent has access to full visitor context such as segment, journey information, and outcome score.
3. After the conversation ends, the agent sets a disposition code within their desktop to record the outcome of the conversation.



Business Flow Description

1. The customer starts browsing the company website.
2. Genesys determines whether the customer is new or returning to the website, and associates data from previous journeys.
3. The combination of segment and variations in outcome score can trigger an offer to chat with an agent or with a chatbot while the customer is browsing the website.
4. An algorithm determines the predicted availability of agents to handle the interactions.
5. If the customer accepts the invitation for chat, a registration window pops up where the customer can enter his data and the conversation with Genesys Blended AI Bots (CE31 Use Case) will start. In the registration form, customer can either manually enter his contact details (name, email) or contact details will be pre-filled if already known to Genesys.
6. In Genesys Routing logic, a decision can be made based using context (for example, customer segment, customer lifetime value) and current agent availability

Business and Distribution Logic

Business Logic

BL1 - Customer Identification

The system can use cookies to detect returning visitors and associate them with previous site visits. Identity information provided during the journey (such as email address or phone number) is captured after it is explicitly submitted from the web page and can identify the visitor even across devices. After the customer is identified, all tracking data collected is associated to that specific customer. All customer information collected is done in a GDPR compliant fashion. When visitor identity cannot be determined, the customer is handled as an anonymous user and all tracked data attached to them.

BL2 – Segment and Outcome Configuration

Segments are a way to categorize visitors on the website based on common behavior and attributes. Segments are configured upfront during system provisioning. A segment can be made up of one or both of these components:

- Attributes, such as browser type, device type, location, marketing campaign they are associated with, UTM parameters, and the referral website.
- Journey pattern, such as web browsing behavior, searches performed on the website, items clicked, returning users, cart abandoner, and high order value.

Outcomes or goals are specific tasks you want your visitors to perform on your website. As with segments, these are configured upfront. Typical outcomes include:

- Check order status or return status
- Open or check status of a trouble ticket
- Locate warranty or return policy
- Application submission
- Online purchase confirmation
- Submit payment
- Online quote
- Book a demo or appointment

Genesys uses predictive analytics to evaluate in real time the probability for a specific outcome to be achieved, based on segment and visitor behavior on the website (the outcome score).

BL3 – Action Map Configuration

Action maps determine the way to engage with the website visitor. Within action maps, you define the triggers that result in an action to the customer. These triggers can be based on any combination of:

- Segment
- User activity
- Outcome score (typically, a drop in outcome score for a specific segment can trigger a webchat)

BL4 – Customer Invite and Registration Window

Genesys Widgets will be used for:

- Invite messages for webchat
- Collection of visitor's contact details

- Engagement over chat session

Distribution Logic

The distribution of the interaction is determined by the target expression and virtual queue configured in the Genesys Predictive Engagement rules.

User Interface & Reporting

Agent UI

- Integration of Genesys Predictive Engagement desktop gadgets into Interaction Connect (if chatbot conversation requires escalation to an agent)
- Single sign-on is available as an option

Reporting

Real-time Reporting

An admin can see the Live Now view of current visitors and live tracking information on the site. The views allow admins to make real-time operational decisions. For example, when a marketing campaign has gone live and drill into individual customer journeys.

Historical Reporting

Interaction reporter and scheduled reporting are available in Pure Connect to evaluate webchat agent, queue, and customer handling performance.

The visitor activity report provides trend analysis and a drill-down by device type.

Reporting on segments matched and outcomes achieved.

Action map performance of action types; webchat, content offers and architect flow. It allows a funnel drill-down performance of the key stages which can identify resourcing requirements, queue issues,

- Qualification
- Offer
- Acceptance
- Engagement

A CX Insights Dashboard that shows the following will be available:

- Combined total number of chats (native, Predictive Engagement and bots) for a workgroup for an interval.

- Total number of native chats for a workgroup for an interval.
- Total number of Predictive Engagement chats for a workgroup for an interval.
- Total number of bot chats for a workgroup for an interval.
- Combined total number of chats (native, Predictive Engagement and bots) for an agent for an interval.
- Total number of native chats for an agent for an interval.
- Total number of Predictive Engagement chats for an agent for an interval.
- Total number of bot chats an agent for an interval.

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
Digital <ul style="list-style-type: none"> • Genesys Chat Routing (CE18) 	None	None	None
Self-Service and Automation <ul style="list-style-type: none"> • Genesys Chatbots (CE31) 			

General Assumptions

- Genesys Widgets 9 must be used
- General logic for routing of interactions will be using the logic defined within the mandatory use cases
- Design and configuration of this use should take it into account previous deployment of mandatory use cases
- Integration of Predictive Engagement desktop gadgets into Interaction Connect.
- Genesys Predictive Engagement for On Premises is sold as Subscription only (On Premises Perpetual customers may consume through subscription).

Customer Responsibilities

- Customer must deploy both Predictive Engagement and Widgets code snippets on their website / web pages

Document Version

- Version **1.1.2** last updated **March 27, 2025**

Genesys Voicebots (CE41) for PureConnect

Use voicebots to automate customer conversations and seamlessly hand over to an agent if needed.

What's the challenge?

When your customers call in to self-service or need an agent, they want to get off the phone as soon as possible. Traditional IVRs are complex menu mazes that are unfriendly to use and confuse customers. This leads to longer agent interactions and increases cost of service for an organization

What's the solution?

Deliver a smooth service experience for customers with a bot that intuitively understands customer issues in natural language. It improves contact center operations as agents do not need to intervene for repetitive issues.

Other offerings:

Genesys Cloud Genesys Engage on-premises

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Use Case Overview

Story and Business Context

Successful companies strive to provide good experiences for their customers, but doing so becomes challenging and expensive given the multitude of communications channels (voice and digital) that must be offered to interact with customers. It is increasingly expensive to serve customers with live agents and companies need to optimize efficiencies in cases when requests can be fully or partially automated and serve customers faster and more economically. Customer Service costs are sustainable for self-service channels like in-app, web self-service, and virtual assistant but they begin to increase with web chat and exponentially skyrocket with voice. The challenge to customer service leaders is to provide outstanding experiences for customers by utilizing automation and artificial intelligence blended with human interaction where required.

Blending bots technology with voice, self-service and digital applications enables companies to optimize service without incurring costs associated with live customer interactions. Designing customer experiences with voice bots delivers the following:

- Ability to manage the customer entire journey, automated wherever possible, human touch when needed, for example, chatbots, voicebots, and Altocloud
- Create personalized bot experiences by sharing context across voice and digital channels and with agents
- Voicebots in general provide significantly higher benefits than a traditional IVR due to advancements in speech recognition technology and the introduction of Conversational AI which promotes a more natural interaction providing a high-quality customer experience
- Quickly and easily deploy omnichannel bots with Natural Language Understanding (NLU) and pre-built microapps that leverage industry best practice
- Move to cloud at your own speed and at low risk with cloud, hybrid, and premise options
- Inclusion of voicebots powered by Natural Language Understanding from Google DialogFlow and Amazon Lex to provide natural and rich conversational experiences for customers who call Customer Service. Spoken phrases from customers are transcribed to text by Google Cloud Speech to Text which is then interpreted by the chosen NLU application to identify the customer's intent. For example, book a flight; extract key data for the query such as origin and destination city, date, day, time; and generate an appropriate response and/or further questions to continue the interaction.

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	Increase self-service interactions results in reduced agent-assisted interactions for repetitive or common requests.

Use Case Benefits	Explanation
Improved Customer Experience	Reduce time to serve, which in turn improves Net Promoter Score (NPS). Improve self-service containment rates, handle time, and overall customer experience by enabling routing to the right self-service application by correctly identifying intent.
Improved First Contact Resolution	Present a customer experience that is tailored to the individual based on who they are, why they might be interacting, and the status of the contact center.
Reduced IT Operational Costs	Reuse of existing assets and the option to use less expensive speech alternatives

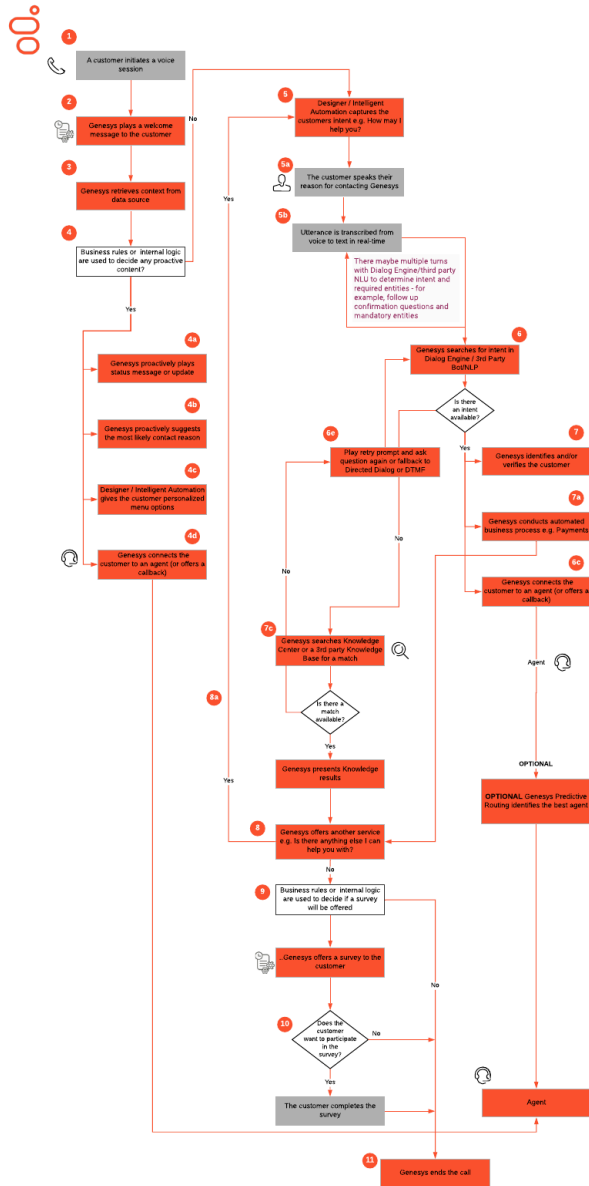
Summary

Genesys supports a “design once, deploy anywhere” concept for AI-driven bots to enable organizations to provide a seamless customer experience across voice and digital channels. This use case focuses on deploying a bot on the voice channel and can automatically be extended to digital channels by adding the Genesys Chatbots with Blended AI Use Case. The voice bot supports and orchestrates the following capabilities:

- Personalization – to tailor the experience based on context from the current interaction or from previous interactions
- Natural Language Understanding (NLU) – to derive intents and entities
- Intent classification utilizes NLU to classify the customer's intent with high accuracy, and connect the customer to the correct self-service process or agent. Also NLU derives entities, which are pieces of relevant information from customer utterances such as: account numbers, amounts, and other parameters that are returned to complete a process corresponding to the intent thus enabling a conversational experience.
- Identification & Verification (ID&V) – to identify and verify the customer if necessary
- Directed Dialog – to automate relevant and structured business processes or provide information
- Involve another NLU/AI platform – if it specializes in a particular topic
- Hand off to a voice agent – to connect the customer to a live person with the full context of the interaction
- Offer a callback - if outside of business hours or long wait time then the voicebot offers a callback from the voice channel
- Offer a voicebot survey depending on business context

Use Case Definition

Business Flow



Business Flow Description

1. A voice interaction is initiated (reactive or proactive) on the voice channel.
2. The customer hears a standard welcome message from the voicebot.
3. Customer information and/or context is retrieved from:
 - Customer profile information stored in PureConnect
 - Genesys User Data
 - API call to third-party data source
4. The customer hears a personalized message or menu or is handed over to a voice agent. Examples include:
 - Custom voice message or update, such as "Your next order is due to be delivered on Thursday before 12"
 - Most likely contact reason, such as "Do you want to find out about the loan application you have in progress?"
 - Customer is provided personalized menu options.
 - Customer is routed over directly to a voice agent. For example, if they have an overdue payment or a callback is scheduled. If the customer is not handed over to a voice agent, then at this point the customer could end their call, confirm the contact reason, or continue.
5. Once the customer has moved on from the Personalization stage, the voicebot asks an open-ended question like: "How may I help you?" to determine intent (and entities) and capture the customer's response.
 - The customer speaks to the voicebot in natural language. For example, the customer could say "I missed a bill payment and want to check my balance because I think I'm in arrears"

- The voicebot listens to the customer and converts the raw spoken utterance into text.
6. The voicebot then sends the customer's response to the configured NLU engine. If intent and entities are returned, the conversation moves to the correct point in the interaction flow, which could be within one of the following subflows:
 7. Identification and Verification (ID&V)
 - Automated business process (such as Payment Collection microapp)
 - Handoff to live voice agent or schedule a callback (see the relevant use case for the channel).
 - If intent and entities are not returned and the organization has Genesys Knowledge Center (GKC) or of third-party Knowledge Base, the system passes the raw textual transcription to be Knowledge Base to look for a result using the Knowledge Base API. If a relevant knowledge article is found, the results are played back to the customer and the customer moves to the next step. If a relevant knowledge article is not found, the voicebot plays a prompt like: "Sorry, I didn't find any results. Rephrase or say AGENT for live assistance." If intent and entities are not returned and the customer does not have a Knowledge Base, the voicebot plays a prompt such as: "Sorry, I didn't understand your question. Please ask me another question or say AGENT for live assistance."
 - Fall back to DTMF is an optional capability that can be quoted by Professional Services separately as it is not included in the scope of this use case.
 8. Upon completion of a task, the voicebot asks a follow-up question like: "Is there anything else I can help you with?"
 - If the customer says something like "yes", they're brought back to Step 5: "How may I help you?"
 - If the customer says something like "no", the voicebot decides whether to

offer them a survey (see the next step). If the customer responds with a more advanced answer, the NLU Engine determines intent and entities for further processing.

9. Customer information and/or context is retrieved from the following sources to determine whether to offer a survey which is available within Genesys Intelligent Automation only (steps 8–10):
 - Customer profile information stored in PureConnect
 - Genesys User Data
 - API call to third-party data source
 - logic defined in Intelligent Automation
 - If a survey is to be offered, the voicebot continues to the next step.
 - If no survey is to be offered, the voicebot shows a goodbye message and ends.
10. The voicebot asks the customer: "Would you like to participate in our survey?"
 - If the customer answers something like "yes", then they continue to the next step and engage in a survey.
 - If the customer answers something like "no", then the customer is shown a goodbye message and the voicebot ends.
11. Optional: If the survey results meet a certain criteria based on the configured evaluation parameters, a specific action can be taken. For example, if the customer provides a negative response, they can be routed to a live agent.

Business and Distribution Logic

Business Logic

BL1: Agent Handoff: The customer can ask to be connected to an available voice agent. Other context can also be displayed as Case Data.

BL2: Retries: The number of retries for self-service tasks and questions can be configured by a

business user. Upon, maximum retries the dialog can be configured to play a message, hand off to a voice agent, or offer a callback if busy or outside of business hours.

BL3: Response Type: The interaction flows can be configured to accept natural language spoken responses and closed spoken responses such as account number, date of birth, and yes/no questions.

BL4: Callback: If outside of business hours, or estimated wait time (EWT) is high, the voicebot can offer a callback. If this option is not included, then a message is played back to the caller that a transfer is not possible.

BL5: Survey: The customer can determine whether to address a survey or not. Surveys can be based on:

1. Customer profile information stored in PureConnect
2. Genesys User Data
3. API call to third-party data source

Parameters Influencing VoiceBot Behavior

This Use Case is supported across industry verticals. The basic features of voicebot business logic such as personalization are parametrized. Example parameters include:

- Personalization
- Segmentation, offer management, characteristics, and most likely contact reason
- Intents - the goal of the interaction - for example, a "pay_bill" intent returned by NLU Engine would indicate that the customer should be presented with an authentication business process followed by a payment business process
- Entities - more pieces of key information returned by NLU Engine. Entities can accelerate the conversation by pre-populating answers to subsequent questions
- Confidence levels

Agent Handoff:

- Based on user choice, such as "I want to speak to an advisor"
- Based on default handling, such as retries, timeouts, global commands
- Based on application logic, such as customer with an outstanding debt and application decides to transfer

Callback

- Estimated wait time to determine whether to offer callback

Survey

- Based on context from PureConnect, Intelligent Automation, Genesys User Data, or third-party web service

Distribution Logic

When the conversation is handed over to a live agent, the interaction moves to one of these use cases, depending on the channel the customer is using - see the Use Case Interdependencies section for related use cases.

User Interface & Reporting

Agent UI

N/A

Reporting

Real-time Reporting

Key real-time metrics that can be included in a report are:

- Current interactions waiting in the system
- Total interactions
- Agent Group Status

Historical Reporting

- How many conversations took place over a period
- Length of time for each conversation: maximum/minimum/average

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

All of the following required:	At least one of the following required:	Optional	Exceptions
Inbound <ul style="list-style-type: none"> Genesys Call Routing (CE01) 			

General Assumptions

- Use Case supports voice channel. Genesys Chatbots (CE31) for PureConnect supports digital channels.
- This Use Case is supported by industry templates that contain examples of voicebot applications combining personalization, natural language understanding, AI, and microapps. Voicebot application requirements including required microapps will be confirmed during design. These application templates are created for Financial Services, Telco, and Travel.
- Handoff to voice agent is on the same channel.
- To access a 3rd party NLU, it must be routed through Intelligent Automation.
- NLU capabilities for non-English languages can be supported through third-party NLU engines such as Google DialogFlow. Integration to third-party NLU/AI engines is a customization task. Dialogs that do not require NLU can support any language by using personas.
- Integration to Knowledge Center is a customization task; an example integration code snippet can be provided.
- Callback dialog flow is provided by the Intelligent Automation Smart Transfer microapp.
- Chat transcript is not passed to callback agent.
- Survey dialog flow is provided by the Intelligent Automation Questionnaire Builder microapp. Results available for download from the Intelligent Automation Control Center or via web service.
- More infrastructure is required to support UniMRCP and Google ASR.
- The Intelligent Automation Control Center to configure voicebots is localized to support the following languages:
 1. English (United Kingdom)
 2. French
 3. Spanish (Mexican)
 4. German
- The IVR transcript will not pass.
- The voicebot is deployed in a Hybrid model, that is, Genesys PureConnect infrastructure on premise with Google components in the cloud.
- Google ASR is connected through a universal UniMRCP connector that supports voicebots through Intelligent Automation, if a customer needs voice-based ASR they require Nuance.
- There is an extra lead time for cloud deployment for a customer-specific infrastructure plan to be

created. Cloud Operations supports many customers and a new deployment enters into the queue with other requests.

- Dialog Engine is not available for PureConnect. It is only available on Genesys Cloud CX.

Customer Responsibilities

- Voicebot configuration and settings will be quoted as part of a Professional Services engagement to capture requirements and business logic.

Document Version

- Version **1.0.2** last updated **March 27, 2025**

Genesys Workforce Scheduling for Voice (EE01) for PureConnect

Important

The Optimizer Use Case for PureConnect is not available. Please reference the Genesys Workforce Scheduling for Voice (EE01) for Genesys Engage on-premises product and use case as a Workforce Engagement Management option.

Optimize employee utilization for voice interactions

What's the challenge?

Optimizing employees' schedules is a tricky balance. Under staff, and customer experience can suffer as wait times climb, SLAs slip, and agents feel pressured. Over staff, and high workforce costs cut into your bottom line. Without easy, accurate forecasts, it's hard to schedule your workforce effectively.

What's the solution?

Find the right balance. Your Genesys solution automatically gathers data, making it easy to get accurate forecasts and scheduling scenarios across queues and activities. Factor in agent skills and contract rules to cover your bases, and get real-time insight and monitoring into SLAs and schedule adherence.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

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: *Info needed.*

Summary

Use Case Definition

Info needed.

Business and Distribution Logic

Business Logic

User Interface & Reporting

Reporting

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

Document Version

- Version **v 1.0.0** last updated **March 27, 2025**

Genesys Omnichannel Workforce Scheduling (EE02) for PureConnect

Important

The Optimizer Use Case for PureConnect is not available. Please reference the Genesys Omnichannel Workforce Scheduling (EE02) for Genesys Engage on-premises product and use case as a Workforce Engagement Management option.

Optimize employee utilization for all digital interactions

What's the challenge?

Your call center may have set hours, but your digital channels are always on. Without the right insights, it's hard to create balanced schedules that allow your company to be responsive to digital interactions while considering employee hours, contracts, preferences and time off, and labor laws.

What's the solution?

Find the right balance. Your Genesys solution automatically gathers data, making it easy to get accurate forecasts and scheduling scenarios across channels. Factor in arrival patterns and hours of operation to cover your bases, and get real-time insight and monitoring into SLAs and schedule adherence.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

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: *Info needed.*

Summary

Use Case Definition

Info needed.

Business and Distribution Logic

Business Logic

User Interface & Reporting

Reporting

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

Document Version

- Version **V 1.0.1** last updated **March 27, 2025**

Genesys Shrinkage Management (EE03) for PureConnect

Important

The Optimizer Use Case for PureConnect is not available. Please reference the Genesys Shrinkage Management (EE03) for Genesys Engage on-premises product and use case as a Workforce Engagement Management option.

Improve operational effectiveness by better managing agent non-working time

What's the challenge?

Your contact center has many locations, time zones, and employees. Managing shrinkage with a spreadsheet based approach isn't working. Shrinkage is eroding the amount of time agents spend handling customer interactions which leads to increased operational expense, reduced service levels, and customer churn.

What's the solution?

Genesys WFM Solution improves forecast and schedule accuracy by including shrinkage in the plan. Schedule adherence, a primary cause of shrinkage, tracks variances between target and actual employee availability. With accurate workforce scheduling you can deliver higher service levels at lower operating costs.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

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: *Info needed.*

Summary

Use Case Definition

Info needed.

Business and Distribution Logic

Business Logic

User Interface & Reporting

Reporting

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

Document Version

- Version **V 1.0.0** last updated **March 27, 2025**

Genesys Voice Recording (EE07) for PureConnect

Record voice interactions

What's the challenge?

You need to reliably record calls to help agents get better, enhance the customer experience and manage risk. When recordings are not complete or available, you risk being out of compliance and lose valuable information that could be used to improve efficiency and make customers happier.

What's the solution?

Monitor quality to continuously improve performance and experiences. Be compliant. Genesys Voice Recording, natively integrated with the Genesys Customer Experience Platform, reliably records 100% of calls, makes it easy to search and access recordings, and doesn't lose a beat with transfers - even across sites.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

Businesses need to reliably record calls to improve customer experience and employee performance, be compliant, and manage risk. Voice recording is native on the Genesys platform. It reliably records 100% of calls — even across multiple sites — and makes it easy to search and access recordings regardless of location. Through voice recording, customer service operations can analyze the quality of voice conversations, identify training needs and help to continuously improve the performance of employees. The payoff is a better customer experience.

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
Reduced IT Operational Costs	Eliminate the need to purchase additional hardware, software, and the associated maintenance and support services through integrated approach
Reduced Penalties and Fines	Record 100% of calls with no lost calls. Improve security by making parties aware they are being recorded

Summary

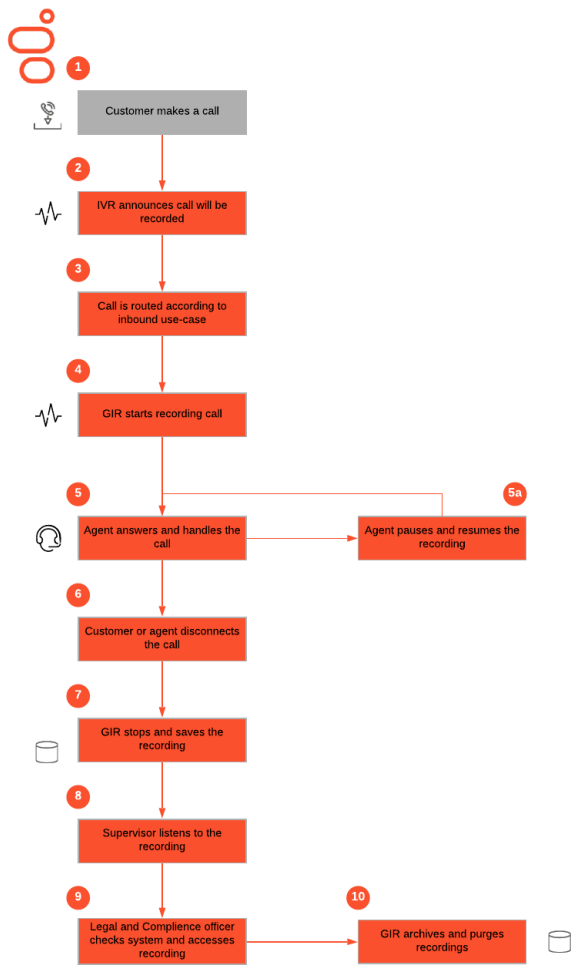
PureConnect can provide 100% voice recording of customer conversations with agents for compliance and regulatory requirements.

Use Case Definition

Business Flow

The following image describes the main actors of the business flow and their goals:

- The customer calls a service number, and the call is recorded
- The supervisor needs to be able to listen to recordings
- The agent needs to be able to pause/resume recordings
- The Legal and Compliance officer needs to be able to access the system to audit and protect recordings



Business Flow Description

1. Customer calls one of the service lines of the company.
2. An announcement is played to the customer that the call is going to be recorded.
3. The call is handled and routed to an agent following the logic of the Inbound Voice distribution strategy which is implemented for the Service Line. This can be either the use case "CE01 - Connect a voice interaction to right resource" or "CE02 - Personalized & Value Based Voice Routing". The Inbound Voice routing strategy is not within the scope of this use case.
4. Genesys Interaction Recorder starts the recording.
 - 5. Agent answers the call from any desk within the site.
 - The agent may (if enabled) pause/resume the recording manually via the standard configuration with Genesys CIC Client when sensitive data needs to be entered.
6. Customer or Agent disconnects the call.
7. Genesys Interaction Recorder stops and stores the recording.
8. Supervisor searches for, retrieves and listens to a recording made by one of their agents.
9. Legal and Compliance officer checks the system for compliance and retrieves recordings for legal purposes.
10. Genesys Interaction Recorder archives and purges recordings according to the rules defined in the system.

Business and Distribution Logic

Business Logic

Details of the business flow depend on how the system is set up for your environment. This section describes the options which are available and how the initial set-up may be done for your environment by Genesys Professional Services, within the scope of this Smart use case.

Metadata

Metadata are attributes that can be added to the recording to allow precisely targeted interaction search and selection for evaluation and analysis. The available attributes depend on the distribution logic implemented in your environment and are defined with you during the implementation project.

Retention Criteria

Recordings can be archived and / or purged from the system after a specified time. After recordings have been purged, they are no longer available for supervisors or compliance officers via the Genesys user interface. The corresponding retention policies are configured during the implementation of this use case. This use case includes implementation of one set of rules which are valid for all recorded calls. Archived files are not managed by GIR. It is the customer's responsibility to set up a lifecycle policy for these archives and to purge them after the lifecycle period.

User Access

Access to recordings is managed by GIR security policies, which includes roles and associated permissions as well as by the organizational hierarchy defined for the individual agents. The scope of this use case includes the default set of roles that can be provided upon request.

Pause / Resume recording

The ability for an agent to pause/resume a recording from the client application can be enabled or disabled based on customer requirements.

Distribution Logic

N/A

User Interface & Reporting

Agent UI

The agent has the optional capability in the client app to pause/resume a recording when confidential information is passed via the call.

Reporting

Real-time Reporting

The supervisor has the ability to monitor active calls which are being recorded.

Historical Reporting

As a compliance use-case, it is not relevant how many calls per service/business line/customer segment are recorded. The assumption is that 100% of calls are recorded. In addition to the historical

reporting, Genesys Interaction Recorder provides audit logs for recording access. These audit logs contain the following information:

- Who accessed a recording
- Which recording
- When
- Deletions
- Playback requests
- Exports
- Interaction Type
- Wrap-up Code
- All attached attributes, when archived
- Archive logs

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	Inbound <ul style="list-style-type: none"> • Genesys Call Routing (CE01) • Genesys Personalized Routing (CE02) 	None	None

General Assumptions

- The Record Interactions – Base package supports 100% voice recording.
- Media Servers are sized appropriately based on PureConnect sizing calculator.
- Remote Content Servers are used as required by system load.
- The following activities are out of scope:
 - Configuration of Network at its final state: SBC, Media Gateways, VLANs, Firewalls, NAT, Trunking

services, etc.

- Configuration of External Storage system (e.g. SAN / NAS)
- Set up of retention policy for archived files
- Installation of the standard out of the box CIC Clients
- Customization of other desktop application to enable Snippet Recording
- Provisioning of recordings from other vendors

PureConnect Cloud

- Customer will follow standard PureConnect Cloud network topology
- Customer will open all necessary ports
- PureConnect Cloud based storage sized appropriately (RCM customers) as required by system load

Customer Responsibilities

N/A

Document Version

- Version **v 1.0.1** last updated **March 27, 2025**

Genesys Voice and Screen Recording (EE08) for PureConnect

Record voice and screen interactions

What's the challenge?

You need to meet contact center compliance and quality needs, within budget and strategy. When complete voice and screen recordings are too expensive, complicated or don't fit your technology vision, that exposes you to unnecessary costs and risks.

What's the solution?

Get end-to-end interaction recordings by capturing calls and screen activity. Genesys Voice and Screen Recording, already available on your Genesys Customer Experience platform, is simple and cost-effective to add, use and manage. Boost quality, reduce risk and help the contact center improve performance.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

Recording calls and agent screens is important for quality management purposes. Simultaneous playback of recorded calls and agent screens helps to identify issues with agent efficiency, desktop applications, and to identify the training needs of each agent. This powerful solution will enable the modern contact center to record the entire customer interaction, allowing the contact center to meet quality or regulatory compliance requirements. Genesys provides organizations with reliable, high-quality recordings of both audio communications and related desktop screen activity.

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 Agent Competency	Use screen recordings with audio to identify quality issues and optimize the agent's use of back-end systems, and to identify compliance and risk factors. Monitor ACW via screen recordings to identify areas to train and optimize
Improved Customer Experience	Combine recording into training which results in reduced handle time, improved first contact resolution and improved employee attrition
Reduced Penalties and Fines	Record 100% of calls with no lost calls. Improve security by making parties aware they are being recorded

Summary

PureConnect can provide 100% voice recording of customer conversations with agents for compliance and regulatory requirements, with a sub-selection of agent screens being recorded.

Use Case Definition

Business Flow



Business Flow Description

1. Customer makes a call to one of the service lines of the company.
2. The IVR announces that the call will be recorded.
3. The call is handled and routed to an agent following the logic of the inbound voice distribution strategy which is implemented for the service line. This can be one of the existing inbound voice use cases (see these use cases for more details). The inbound voice routing strategy is not within the scope of this use case.
 - Based on initiation policies, which the administrator sets in Genesys, it is determined if the screen needs to be recorded.
4. Genesys Interaction Recorder starts the voice recording.
 - If step 3a determines that the screen needs to be recorded, Genesys Interaction Recorder starts screen recording as soon as the agent answers the call.
5. The agent can answer the call from a single, dedicated desk within the site (product limitation).
 - The agent may (if enabled) pause or resume the recording manually via the standard configuration with the Genesys Customer Interaction Center client when sensitive data is required.
6. The customer or agent disconnects the call.
7. Genesys Interaction Recorder stops the voice recording. Screen recording stops after the configured ACW period has ended.
8. Genesys uploads the screen recording files to the central system immediately or at configured intervals.
9. The supervisor searches for, retrieves, and

listens to a recording made by one of their agents.

10. The legal and compliance officer checks the system for compliance and retrieves recordings for legal purposes.
11. The quality manager searches for, retrieves, and listens to recordings to use in agent evaluations.
12. Genesys Interaction Recorder archives and purges recordings according to the configured rules.

Business and Distribution Logic

Business Logic

Details of the business flow described above depend on how the system is configured for your environment. This section describes the available options and how the initial set-up will be configured for your environment by Genesys Professional Services, within the scope of this use case.

Metadata

Metadata are attributes that can be added to the recording to allow precisely targeted interaction search and selection for evaluation and analysis. The available attributes depend on the distribution logic implemented in your environment and are defined with you during the implementation project.

Retention Criteria

Recordings can be archived and / or purged from the system after a specified time. After recordings have been purged, they are no longer available for supervisors or compliance officers via the Genesys user interface. The corresponding retention policies are configured during the implementation of this use case. This use case includes implementation of one set of rules which are valid for all recorded calls. Archived files are not managed by GIR. It is the customer's responsibility to set up a lifecycle policy for these archives and to purge them after the lifecycle period.

User Access

Access to recordings is managed by GIR security policies, which includes roles and associated permissions as well as by the organizational hierarchy defined for the individual agents. The scope of this use case includes the default set of roles that can be provided upon request.

Pause / Resume recording

The ability for an agent to pause/resume a recording from the client application can be enabled or disabled based on customer requirements.

Screen Recording Percentage

Screen recording occurs only for a percentage of calls. The system will be configured with a percentage or other criteria-based policies. Audio will be recorded in 100% of the interactions.

Distribution Logic

N/A

User Interface & Reporting

Agent UI

- The agent will have the optional capability to pause or resume a recording when confidential information is passed via the call via his agent desktop.
- The Screen Capture Client is installed on the agent's desktop by IT.

Reporting

Real-time Reporting

The supervisor will have the ability to monitor active calls and which are being recorded.

Historical Reporting

As this is a compliance use case, it is not relevant how many calls per service/business line/customer segment are recorded. Assumption is that 100% of calls are recorded. In addition to the historical reporting, Genesys Interaction Recorder provides audit logs for recording access. These audit logs contain the following information:

- Who accessed a recording
- Which recording
- When
- Deletions
- Playback requests
- Exports
- Interaction Type
- Wrap-up Code
- All attached attributes, when archived
- Archive logs

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	Inbound <ul style="list-style-type: none"> Genesys Call Routing (CE01) Genesys Personalized Routing (CE02) 	None	None

General Assumptions

- The Record Interactions – Base package supports 100% voice recording.
- Media Servers are sized appropriately based on PureConnect sizing calculator.
- Remote Content Servers will be used as required by system load.
- The following activities are out of scope:
 - Configuration of Network at its final state: SBC, Media Gateways, VLANs, Firewalls, NAT, Trunking services, etc.
 - Configuration of External Storage system (e.g. SAN / NAS)
 - Set up of retention policy for archived files
 - Installation of the standard out of the box CIC Clients
 - Screen recording client is installed and configured on each agent machine.
 - Customization of other desktop application to enable Snippet Recording
 - Provisioning of recordings from other vendors

PureConnect Cloud

- Customer will follow standard PureConnect Cloud network topology
- Customer will open all necessary ports
- PureConnect Cloud based storage sized appropriately (RCM customers) as required by system load

Use Case Inter Dependencies

This use case can be used on top of

- Genesys Call Routing (CE01) for PureConnect OR
- Genesys Personalized Routing (CE02) for PureConnect (**on-premises only**)

Customer Responsibilities

N/A

Document Version

- Version **v 1.0.1** last updated **March 27, 2025**

Genesys Quality Management (EE09) for PureConnect

Improve employee performance with quality management

What's the challenge?

Businesses need to evaluate the quality of their interactions to identify opportunities for improvement, but it's not efficient to evaluate every single interaction. You need a way to distinguish important from routine interactions, and then generate the results in a consistent and automated manner.

What's the solution?

Genesys Quality Management includes strategic metadata with each recorded interaction to pinpoint which are most valuable to evaluate, and then uses predefined reports to analyze and present those results for a clear and consistent view of where you're strong and where you could improve.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

Quality Management (QM) helps organizations move beyond random sampling to gain a deeper understanding of its agent/customer interactions by monitoring, evaluating, and studying customer interactions. Quality Management not only helps organizations identify agents who underperform, but it also helps them identify the root cause of an agent's behavior. By understanding agent performance and productivity at a granular level, Quality Management offers insight into customer interactions and ways in which agents can improve them. That is, Quality Management offers insight that can increase employee productivity, resolve future customer disputes, and subsequently enhance customer service. It enables the organization to ensure consistent and professional service.

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 Agent Competency	Improve agent performance to spend less time handling the call (AHT) and after call work (ACW), improve accuracy and customer care, and more effective training and compliance management using comprehensive Quality Management tracking
Improved Customer Experience	Address the root cause(s) of low indicators for NPS, FCR and high handle time using Quality Evaluation criteria
Increased Revenue	Identify lower performers and then coach them on critical agent skills to improve sales and collections using Quality Evaluation criteria

Summary

Organizations need to evaluate and improve the quality of the interactions that their employees have with their customers and prospects. The QM module is a tool that helps organizations improve the quality and efficiency of agent performance and contribute to customer satisfaction.

Use Case Definition

Business Flow

Flowchart of business usage:

Business and Distribution Logic

Business Logic

Quality Manager

Create and manage forms (questionnaires) that enable evaluators to provide feedback about a specific agent. That is, when a form is included in an evaluation, it becomes part of a process that helps you identify how an agent is functioning, and subsequently what the agent needs to do in order to maximize your business goals and customer satisfaction. Quality Management evaluations are the best way to evaluate and improve agent behaviors that support your business goals. They drive the behaviors that promote a specific agenda by enabling you to assess how well your agents are performing during customer interactions.

Interaction Recorder

To help ensure that an agent's participation in an interaction coincides with a specific business agenda, evaluators receive a list of evaluation sessions that they must fill out using scorecards according to a configurable schedule. A completed scorecard provides a view into how an agent communicates with consumers. Such evaluation sessions provide consistent and regular feedback that helps surface insightful reports, comments and suggestions that can lead to formal skills training and action plans to improve an agent's performance.

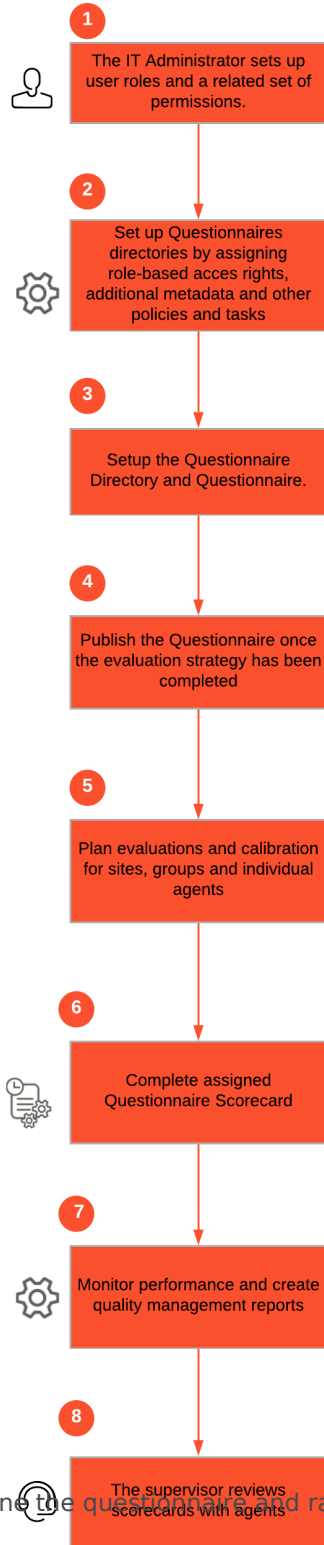
Interaction Reporter

Reports are summaries and analyses of interaction, speech and external metadata. You can generate reports for analysis, view report details and status, and share the data with users throughout the enterprise. You can view reports in your browser, print them or send them via email. To help you monitor your business, IC Business Manager provides a wide range of standard reports that can be customized to better suit your needs. Depending on the type of report, the results may be presented as lists or data and/or in graphic form.

Parameters and Business Rules common flow

The following needs to be set up to support the quality management process:

1. IT Admin to set up users and:
 - Role based access rights for questionnaire directory access
 - Additional metadata configuration (relevant to QM)
 - Initiation and retention policies criteria and actions to auto-assign questionnaire scorecards to recordings and scoring users
2. Set up and publish questionnaires for quality management and historical reporting:



- Define the questionnaire and ranking settings.

Business Flow Description The Business flow shows steps to create QM questionnaires, evaluate recordings, and review results with agents.

1. Set up Users: The IT Administrator sets up user roles and a related set of permissions. Standard users include:
 - Admin
 - Form Designer
 - Evaluation Planner
 - Evaluation Reviewer
 - Supervisor
2. Setup up questionnaire directories by assigning
 - Role-based access rights for questionnaire directory access.
 - Additional metadata configuration (relevant to QM).
 - Initiation and retention policies criteria and actions to auto-assign questionnaire scorecards to recordings and scoring users.
3. Setup the questionnaire directory and questionnaire: From within IC Business Manager, use the Quality Manager views to create and save a Questionnaire with the following:
 - Questionnaire ranking
 - Questionnaire group
 - Questionnaire questions
 - Scoring requirements
4. Publish the questionnaire once the evaluation strategy has been completed to allow the questionnaire scorecards to be assigned to recordings and used for reporting purposes.
5. Evaluation/calibration planning: The evaluation planner plans review sessions for CC sites, groups or individual agents. The planner decides how to configure Interaction Recorder initiation and retention policies to auto-assign questionnaire scorecards based on incoming recorded

- Define the question groups that will be required within a questionnaire.
 - Define and configure the questions contained within each question group; specify the proper question type (multiple choice, yes / no, etc) .
 - Define the importance of each question along with the actual answers.
 - Define which questions will allow comments to be specified and whether or not an answer can be marked Not Applicable (N/A).
 - Define weighting of each question.
3. Save and preview changes for each questionnaire.
 4. Publish questionnaire once each questionnaire has been finalized. Questionnaires must be published in order to be assigned for quality evaluations and included within historical reporting.
 5. Evaluation/Calibration planning
 - Within IC Business Manager, identify recordings that require either evaluation or calibration.
 - Assign calibration scorecards for role or user based calibration.
 - Manually assign questionnaire scorecards to recordings for evaluations.
 - Define process for scoring users to review recordings and complete questionnaire scorecards.
 - Recording searches returns recordings for playback and ability to manage scorecards.
 - Scorecard searches and the Recordings To Score View provides results based on scorecards in progress, auto-assigned, completing, etc.
 6. Manage questionnaire scorecards for evaluation
 - Select scorecard or recordings to be evaluated; playback the recordings and complete the assigned questionnaire scorecard form(s).
 - Save scoring progress as needed. Finish the scorecard and indicate if the agent evaluated must acknowledge (signoff) on the questionnaire scorecard.
 7. Select and run reports
 - Define filters and run Interaction Quality Management reports to review scorecard and quality results.
 - Define filters and run Interaction Reporting Calibration reports to review calibration summary results.
- interactions. Questionnaire scorecards may also be manually assigned to recorded interactions from within IC Business Manager, based on other interaction criteria or recording attributes. Details tasks:
- Attach questionnaire scorecard forms to recorded interaction
 - Assign evaluators (scoring users)
6. Complete assigned questionnaire scorecard: The evaluation planner/supervisor conducts reviews of the appropriate teams and gives feedback and insight into how many reviews need to take place, what has been done, and what is in progress or still pending. Detailed actions:
 - Select a recording.
 - Play back the selected recording.
 - Score a recording with the auto-assigned questionnaire scorecard.
 - Score a recording with a manually assigned questionnaire scorecard.
 - Finish the scorecard.
 7. Create Quality Management Reports: The evaluation reviewer monitors performance on progress results displays and uses report templates that are relevant for the actors' role to display. This can be part of a dashboard, background report, or email subscription. Detailed actions:
 - Run an instance of a selected Quality Management report.
 - Run a calibration report for completed scorecards that were marked for calibration.
 8. Supervisor reviews scorecards with agents: The supervisor pushes a report to the agent to provide feedback. The agent is informed about their performance.
 - Agents review their recently completed scorecards.
 - Agents acknowledge and provide comments (sign-off) for completed scorecards that require action.

- Save to filters to the reporting library for reuse.

Distribution Logic

N/A

User Interface & Reporting

Agent UI

For screen recording, a desktop client needs to be deployed per workstation.

Reporting

Real-time Reporting

N/A

Historical Reporting

In any quality management process, the customer needs to have a proper display of progress and performance results to identify the improvement needs. The customer can define the minimum displays they need to follow a QA process. QM report templates available:

- Calibration Question Group Details
- Deleted Recording Audit by Date
- Deleted Recording Audit by User
- Recorder Questionnaire Detail
- Recorder Scoring Summary
- Recorder User Scoring Summary
- Quality Scoring Details
- Calibration Details
- Calibration Recording Summary

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	<p>Workforce Engagement</p> <ul style="list-style-type: none"> • Genesys Voice Recording (EE07) • Genesys Voice and Screen Recording (EE08) 	None	None

General Assumptions

- Recording is setup in full detail and attribute relevancy is sorted out
- Understanding of the business QA process:
- Scoring quotas/targets and planning criteria are known
- Scoring thresholds are known (for example, 60% minimum 90% excellent)
- Scoring categories are defined (for example, greeting, knowledge, behavior)
- Scoring question types are defined (for example, multi selection, choice pass/fail)
- Scoring answers follows a business standard, such as 2,3,4, answers plus free text
- Result preferred output is defined (for example, how to display what has been measured)
- Regulatory specials:
- With every project it is highly recommended to discuss the local restriction related to compliance, data protection and any special council need to make sure the access to interaction and allowance to review is understood in full detail.
- IWP does not support geo-redundancy, so it is not offered as a geo-redundant solution in PureConnect Cloud.

Document Version

- Version **v 1.0.1** last updated **March 27, 2025**

Genesys Employee Schedule Preferences (EE10-A) for PureConnect

Important

The Optimizer Use Case for PureConnect is not available. Please reference the Genesys Employee Schedule Preferences (EE10-A) for Genesys Engage on-premises product and use case as a Workforce Engagement Management option.

Empower employees with self-administration of their schedule

What's the challenge?

As millennials make up more of your workforce, they want more control in their lives and want to easily self-manage their schedules. Managers want to reduce the time it takes to manage this process as long as the contact center runs efficiently.

What's the solution?

Give employees the control they want. The right web application empowers employees to self-manage their schedules through business rules. Employees can request time off, submit schedule preferences, and manage exceptions — without going through a supervisor or planner.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

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: *Info needed.*

Summary

Use Case Definition

Info needed.

Business and Distribution Logic

Business Logic

User Interface & Reporting

Reporting

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

Document Version

- Version **V 1.0.0** last updated **March 27, 2025**

Genesys Employee Schedule Preferences (EE10-B) for PureConnect

Important

The Optimizer Use Case for PureConnect is not available. Please reference the Genesys Employee Schedule Preferences (EE10-B) for Genesys Engage on-premises product and use case as a Workforce Engagement Management option.

Empower employees with self-administration of their schedule

What's the challenge?

As millennials make up more of your workforce, they want more control in their lives and want to easily self-manage their schedules. Managers want to reduce the time it takes to manage this process as long as the contact center runs efficiently.

What's the solution?

Give employees the control they want. The right web application empowers employees to self-manage their schedules through business rules. Employees can request time off, submit schedule preferences, and manage exceptions — without going through a supervisor or planner.

Other offerings:

Genesys Engage on-premises

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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: *Info needed.*

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Info needed.

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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

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Genesys Employee Schedule Preferences (EE10-C) for PureConnect

Important

The Optimizer Use Case for PureConnect is not available. Please reference the Genesys Employee Schedule Preferences (EE10-C) for Genesys Engage on-premises product and use case as a Workforce Engagement Management option.

Empower employees with self-administration of their schedule

What's the challenge?

As millennials make up more of your workforce, they want more control in their lives and want to easily self-manage their schedules. Managers want to reduce the time it takes to manage this process as long as the contact center runs efficiently.

What's the solution?

Give employees the control they want. The right web application empowers employees to self-manage their schedules through business rules. Employees can request time off, submit schedule preferences, and manage exceptions — without going through a supervisor or planner.

Other offerings:

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Genesys Employee Schedule Preferences (EE10-D) for PureConnect

Important

The Optimizer Use Case for PureConnect is not available. Please reference the Genesys Employee Schedule Preferences (EE10-D) for Genesys Engage on-premises product and use case as a Workforce Engagement Management option.

Empower employees with self-administration of their schedule

What's the challenge?

As millennials make up more of your workforce, they want more control in their lives and want to easily self-manage their schedules. Managers want to reduce the time it takes to manage this process as long as the contact center runs efficiently.

What's the solution?

Give employees the control they want. The right web application empowers employees to self-manage their schedules through business rules. Employees can request time off, submit schedule preferences, and manage exceptions — without going through a supervisor or planner.

Other offerings:

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Genesys Shift Bidding (EE11) for PureConnect

Important

The Optimizer Use Case for PureConnect is not available. Please reference the Genesys Shift Bidding (EE11) for Genesys Engage on-premises product and use case as a Workforce Engagement Management option.

Empower employees to influence their schedules

What's the challenge?

As millennials make up more of your workforce, they want more control in their lives and a way to easily influence their schedules. Managers want to reduce the time it takes to manage this process as long as the contact center runs efficiently.

What's the solution?

Supervisors manage specific employees who can choose shifts or schedule they want while managing the operation of the contact center.

Other offerings:

Genesys Engage on-premises

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Genesys Speech Analytics (EE22) for PureConnect

Important

The Optimizer Use Case for PureConnect is not available. Please reference Genesys Speech Analytics (EE22) for Genesys Engage on-premises product and use case as a Workforce Engagement Management option.

Gain basic insight into voice interactions using speech analytics

What's the challenge?

Organizations that record all or a portion of their calls amass a significant amount of data in those recordings. The difficulty lies in sifting through thousands of hours of dialog to find what's most important - a task that's impossible without automation.

What's the solution?

It starts by automating the transcription of your calls. From there, you can discover trends such as frequency and changes in frequency of words and phrases. Use the search function if you're looking for something specific.

Other offerings:

Genesys Engage on-premises

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None	None	None	None

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Genesys Advanced Text and Speech Analytics (EE23) for PureConnect

Important

The Optimizer Use Case for PureConnect is not available. Please reference the Genesys Advanced Text and Speech Analytics (EE23) for Genesys Engage on-premises product and use case as a Workforce Engagement Management option.

Achieve deeper operational insights with speech and text Analytics

What's the challenge?

There's a lot of dialog that resides in your recorded voice calls and digital interactions. How do you make that data actionable and help improve your operational and strategic goals?

What's the solution?

Automate the transcription of your voice and digital interactions, including tools for deeper analysis and trending.

Other offerings:

Genesys Engage on-premises

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Genesys Text and Speech Analytics for Customer Service (EE24) for PureConnect

Important

The Optimizer Use Case for PureConnect is not available. Please reference the Genesys Text and Speech Analytics for Customer Service (EE24) for Genesys Engage on-premises product and use case as a Workforce Engagement Management option.

Mine call recordings for insights to improve agent and customer experiences

What's the challenge?

Most customer requests and issues follow consistent patterns, but you still need people to make sense of their language to respond. Teams can still miss emerging changes in customer requests until they become bigger issues. Finally, how can you identify better issue handling to adopt for training?

What's the solution?

AI transcription of voice, combined with text interactions in all channels, identifies keywords and phrases along with customer context to improve responses. Detect changes in the occurrence of words and phrases over time and across interactions to unlock valuable insights into call outcomes.

Other offerings:

Genesys Engage on-premises

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Genesys Text and Speech Analytics for Compliance (EE25) for PureConnect

Important

The Optimizer Use Case for PureConnect is not available. Please reference the Genesys Text and Speech Analytics for Compliance (EE25) for Genesys Engage on-premises product and use case as a Workforce Engagement Management option.

Enforce compliance and legal responsibilities with speech and text analytics

What's the challenge?

Many organizations work under strict regulatory requirements for use of data and communications. Monitoring for compliance adherence is a never-ending and stressful job. There isn't time to check every interaction so you use sampling, but what if you miss a critical problem?

What's the solution?

Automated speech and text monitoring for comprehensive monitoring. Genesys systems check agent and organization compliance with legal, regulatory and organization obligations. Monitor 100 percent of interactions to reduce risk of compliance failures, litigation, financial impact and damage to reputation.

Other offerings:

Genesys Engage on-premises

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None	None	None	None

Document Version

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Genesys Business Communications (OP01) for PureConnect

Simplify contact center and business communications

What's the challenge?

Companies are tired of dealing with the complex maze of separate communications solutions that require more resources to deploy and maintain, increase cost of ownership, and leave the business without a good way of collaborating across teams. Customers and employees are too important to just maintain the status quo.

What's the solution?

Consolidate multiple systems to a single, reliable platform for both contact center and business users. With a unified platform, enterprises can seamlessly connect with customers, partners and teams anywhere. Enjoy fast deployment, simplified administration, improved efficiency and reduced total cost of ownership.

Other offerings:

Genesys Cloud

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Use Case Overview

Story and Business Context

Companies are looking to reduce complexity, simplify administration, improve efficiency, and reduce total cost of ownership. They need a way to have a single platform for powering both contact center and business users. The combination of customer experience management and business communications gives customers a unified all-in-one solution. Companies are tired of dealing with multiple cobbled-together communications solutions that require more resources to deploy and maintain, increase cost of ownership, and leave the business without a good way of collaborating across teams and business units. Customers and employees are too important to just maintain the status quo. With a unified platform, enterprises smartly connect departments, workgroups, contact centers, branch offices, and remote and mobile workers. The unified platform supports basic dial tone capability, plus multichannel queuing and routing, IVR, speech-enabled auto-attendant, unified messaging, conferencing, and presence management. Companies want a platform that extends beyond call control to provide multichannel customer service calls, faxes, email, and messaging that handles all types of communications quickly and consistently. Platform business users require streamlined real-time monitoring and end-to-end reporting capabilities that make it easy to ensure service quality across channels. Equally as important to the business are applications for multichannel recording and scoring, as well as automated post-call satisfaction surveys to improve service performance on a continuous basis. In keeping with multi-modality requirements, companies must empower their employees, especially their sales force and field organizations with mobility-based applications to give them the same functionality as their in-office counterparts: company-wide presence, one-number find-me/follow-me, conferencing, ad-hoc call recording, and unified messaging, as well as speech-enabled access to email, calendars, and contacts from anywhere. Selecting a unified platform that supports basic to advanced communication capabilities becomes a competitive advantage.

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
Reduced Administration Costs	Implement a single all-in-one platform to reduce equipment and operational costs, streamline centralized administration and reporting, and save on personnel and training from a single vendor
Reduced Deployment Costs	Automate key parts of deployment through auto-configured PureConnect gateways for IP networks and VoIP, auto-provisioning and management of IP phones, and pushed-out client updates via Interactive Update™. Take advantage of incremental application licensing and multi-site location independence with disaster recovery, which is easily scalable and cost effective.
Reduced IT Operational Costs	Leverage your existing technical expertise with a standards-based platform that openly integrates

Use Case Benefits	Explanation
	with third-party PBX systems, IP PBX systems, IVR systems, and call recorders - or simply use the built-in features. It integrates easily to databases, web services, messaging platforms, back-office systems, business apps, CRM and ERP packages, and SIP devices, including gateways, telephones, and headsets. Take advantage of the platform's open interoperability that eliminates vendor lock-in to proprietary hardware. Save on phones and hardware by using softphones with a browser and network or Internet connection

Summary

This use case offers rich IP PBX functionality, together with basic unified communications features. Features include: IP PBX call processing, auto-attendant, full-featured operator console, complete desktop phone features, enhanced desktop client features, SIP softphone, real-time presence management, on-demand call recording and monitoring, conferencing, corporate and workgroup directories, embedded call controls for desktop applications, instant messaging, voice mail and unified messaging, multilingual support, and reporting. All of this functionality is built in to the Interaction Center server, so it's merely a licensing exercise to use.

Use Case Definition

Business Flow

(1)

Business Flow

(2)

Business and Distribution Logic

Business Logic

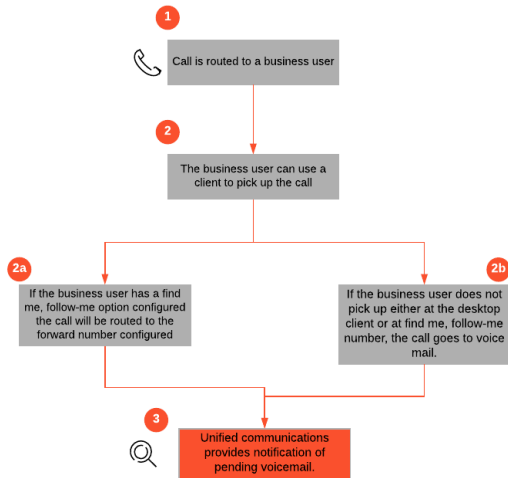
N/A

Distribution Logic

An ACD agent connects to a PBX user (e.g., Subject Matter Expert/SME). The PBX user/SME can be a remote agent working from a satellite location or from home. In either case the ACD agent would see the status of the SME and be able to warm transfer the customer call.



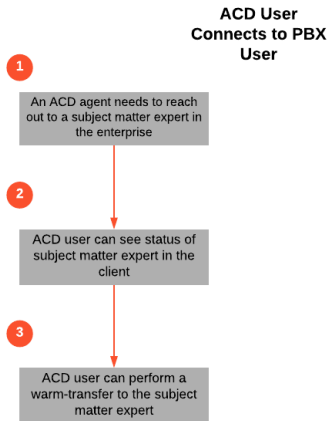
**Inbound PBX Call
or Call to a
Business User**



Business Flow Description Inbound PBX call or call to a business user

Call options provided

1. The call routes to a business user.
2. The business user can use the client to pick up the call.
 - If the business user has the find-me/follow-me option configured, the call is routed to the forward number configured.
 - If the business user does not pick up either at the desktop client or at the find-me/follow-me number, the call goes to voice mail.
3. Unified communications provides notification of pending voice mail.



1. The **Business Flow Description** ACD user connects to PBX user

1. The ACD agent needs to reach out to a subject matter expert in the enterprise.
2. The ACD user can see the status of the subject matter expert in the client.
3. The ACD user can perform a warm-transfer to the subject matter expert.

ACD agent needs to reach out to a SME in the enterprise.

2. The ACD agent can see the status of the SME in the client.
3. The ACD agent can perform a warm-transfer to the SME.

User Interface & Reporting

Agent UI

See the PureConnect Installation and Configuration Guide [PureConnect Installation and Configuration Guide](#) .

Reporting

Real-time Reporting

See the Interaction Reporting Help landing page in the PureConnect Documentation Library and the PureConnect Reporting Technical Reference.

[Reporting Help Landing Page](#)

[Reporting Technical Reference](#)

Historical Reporting

Interaction Reporter is an IC Business Manager application that allows you to run pre-defined reports, using filters to configure report parameters.

[Interaction Reporter Help](#)

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

- The customer is an existing PureConnect on-premises customer.
- Or, the customer is an existing PureConnect cloud customer.

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