PureConnect Use Cases

Genesys Customer Authentication (CE07) for PureConnect

2/4/2026

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:

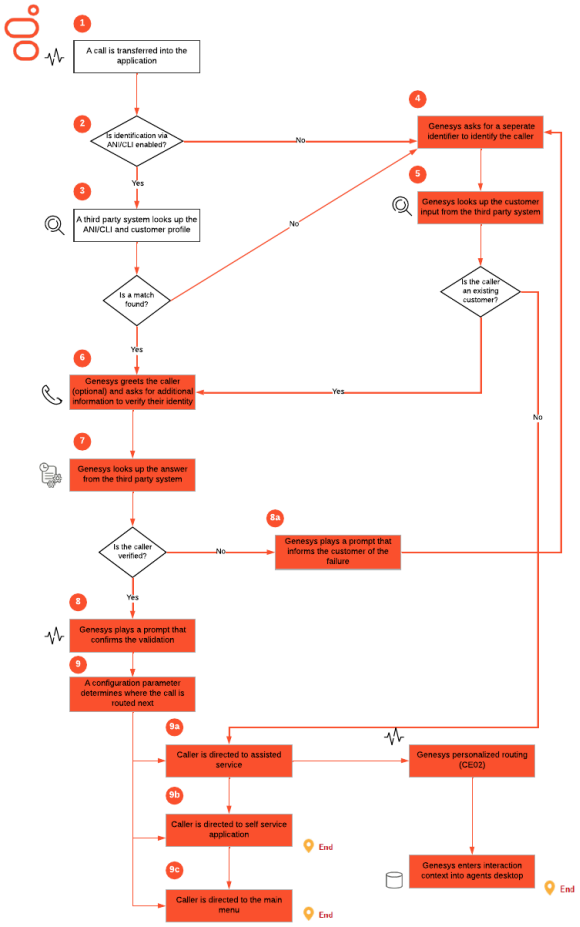
Use Case Benefits	Explanation
Improved Containment Rate	Reduce agent handled inbound call volume by improving containment rate through a robust and flexible solution
Improved Customer Experience	Improve NPS by saving the customer time through efficient and automated ID&V interaction*
Reduced Handle Time	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 separateID&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 • 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 **February 5, 2026**