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PureConnect Use Cases

Genesys Email Routing (CE16) for PureConnect

4/24/2026

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

Contents

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

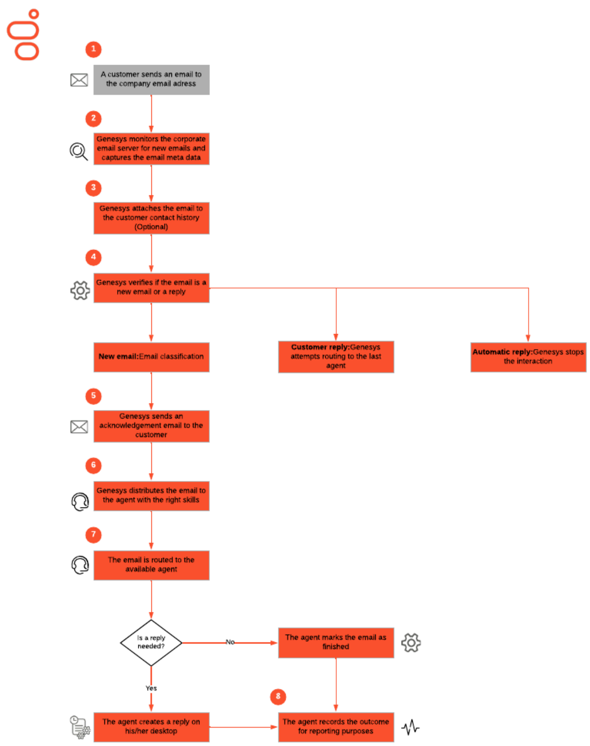
Summary

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 **April 24, 2026**