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# PureConnect Use Cases

Genesys Digital Callback (CE22) for PureConnect

2/28/2024

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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

## Contents

- [1 What's the challenge?](#)
- [2 What's the solution?](#)
- [3 Use Case Overview](#)
  - [3.1 Story and Business Context](#)
  - [3.2 Use Case Benefits\\*](#)
  - [3.3 Summary](#)
- [4 Use Case Definition](#)
  - [4.1 Business Flow](#)
  - [4.2 Business and Distribution Logic](#)
- [5 User Interface & Reporting](#)
  - [5.1 Agent UI](#)
  - [5.2 Reporting](#)
- [6 Customer-facing Considerations](#)
  - [6.1 Interdependencies](#)

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- 6.2 Document Version

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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:

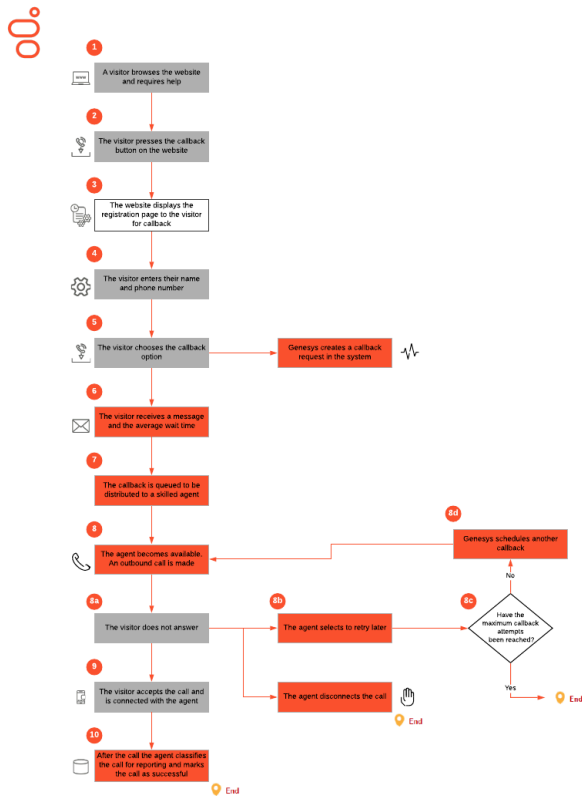
Use Case Benefits	Explanation
Improved Customer Experience	Address customers' requests in a timely manner to lead to better NPS, and provide seamless transition from self-service to assisted service and reduced queueing time
Improved Employee Utilization	Improve agent occupancy by enabling callback and 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.

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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.

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## 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

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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.

<b>All of the following required:</b>	<b>At least one of the following required:</b>	<b>Optional</b>	<b>Exceptions</b>
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:



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- 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 **February 29, 2024**