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# PureConnect Use Cases

## Genesys SMS Routing (CE29) for PureConnect

2/7/2025

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## 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.

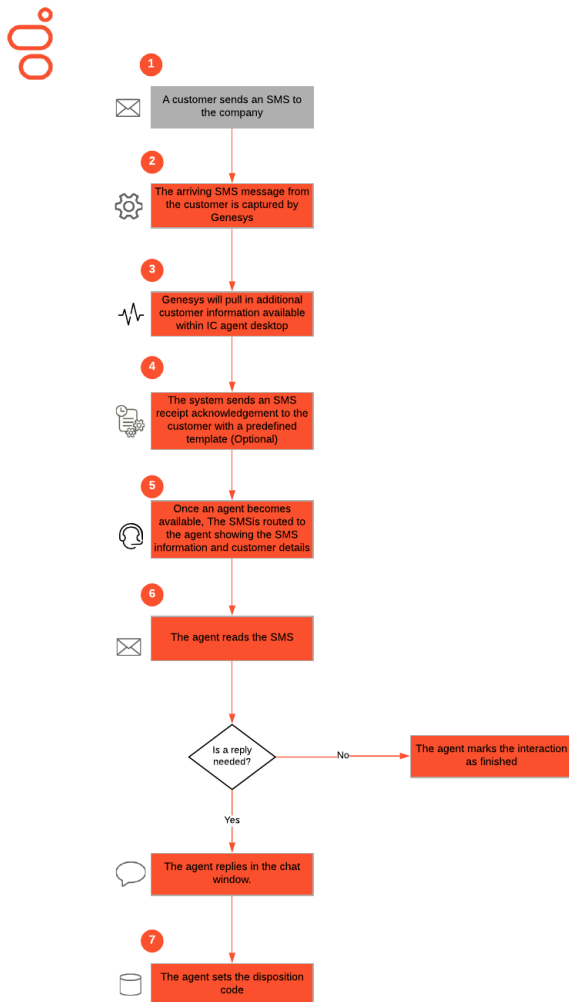
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# Use Case Definition

## 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.

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## 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 us 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

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## 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.

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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

- 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.



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## Document Version

- Version **v 1.0.2** last updated **February 7, 2025**